

SERVICENOW PROJECT MANAGEMENT

TRAINING MANUAL

MAY 2019

CONTACT

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Introduction to Project Management

A Project is a temporary activity with a defined beginning and end. The challenge is to achieve all the project goals within the given constraints of scope, time, and budget.



Project Management assists with delivering a well defined product or service on time and on budget. It uses processes and techniques to coordinate resources and to achieve predictable results.

Traditional Project Management Procedures include Initiation, Planning and Design, Execution, Monitor and Control and Completion or Closing.

The ServiceNow Project Portfolio Management (PPM) application tracks and manages all aspects of projects. It will assist with financial tracking, scheduling resources, managing tasks, and it provides the use of templates and the ability to update status reports.



Objectives

By the end of this manual the user will be able to:

- 1. Create projects in ServiceNow.
- 2. Capture project goals and objectives.
- 3. Define an action plan to coordinate and control activities.
- 4. Track budget and project expenses.
- 5. Manage resource needs and task assignees.



LOG INTO SERVICENOW

Chrome is the recommended browser.



Click to Login.

For training class go to <u>https://dev.support.rowan.edu</u> In production, go to <u>https://support.rowan.edu</u>



Login with Rowan Credentials.



Complete Duo Authenication if prompted.



Select Technician from the top menu.



APPLICATION NAVIGATOR



You can hover next to the name of the module and transparent star will appear. Select the star to fill it in, and that module will become a favorite. In the application navigator, select the middle star at the top of the navigator and you will see the list of favorites.







CREATE A NEW PROJECT

In the New Project form, complete the fields below.

Project Name - The name of the project that is used on the Project Intake form.

Project Manager - Search for and select your name.

Portfolio - If this project is part of a portfolio, search for the portfolio name by clicking the icon.

Program - If this project is part of a program, search for the program name by clicking the icon.

State - Leave in the **Pending** state until you have completed the project plan and work actually begins on the project. When you change to Work in Progress, you will be limited to changes you can make in the project plan.

Calculation (Automatic is recommended):

- Manual project: Changes to the dates, duration, or relationships of a project task do not automatically update other tasks.
- Automatic project: Change to the dates, duration, or relationships of a project task automatically updates the dates of other tasks in the project.

Description: A detailed description of the project; include what is on the intake form.

Dates Tab

Planned start date - Click the calendar icon, and search through the months, click on the desired day and then click the green check mark to confirm. (If you don't put in the start date here, it will automatically be assigned today's date, and it can not be changed later).

The **Planned end date** and **Planned duration** are automatically calculated from the tasks. If tasks or a schedule will not be included, enter the planned end date. Select **Save.**

< Project New record [New view]				Ø	≑ ∞∞ Sav	e Start project	Submit
							^
To create project from a template cli	ick here.						×
* Project Name	Effort Reporting Banner 9 (Test)					8	
Project manager	Hegel, Marybeth	Q ()	Number	PRJ0010536			
Portfolio		Q	State	Pending	•		
Program		Q	Calculation	Automatic			
Description	Updating the Banner 8 Effort Report	ting Module to Banner 9.					
Dates Financials Notes							
Schedule	Project Management Schedule				Q	0	
Planned start date	03/01/19 08:30:00 AM	#					
Planned end date	03/01/19 04:30:00 PM	æ					
Planned duration	Days 1 Hours 00 00	00					
Save Start project Submit							
				Response time(ms): 4029,	, Network: 3, server: 3276	, browser: 750	~

APPLY A TEMPLATE

Project templates include project tasks and subtasks, attachments, checklists, and other project information. Because projects often get repeated, templates enable you to create, save, and reuse project structure. You can also modify existing templates, create projects from templates, and apply templates to empty projects. For more information about creating Templates see Appendix A.

< Project Effort Reporting Banner S	(Test)		Ð	√
Initiating	Planning	\rangle	Executing	
To apply template click here.				
≫ Project Name	Effort Reporting Banner 9 (Test)	₽ 🖻		Number
Project manager	Hegel, Marybeth	Q. (j)		Percent complete
Status	Green	•		State
				Priority
Description	Updating the Banner 8 Effort Repo	rting Module to Banner 9.		
Dates Details Business Case	Financials Score Notes Prefer	rences		

In the upper left of the screen, just above project name, select "To apply template click here".

Search for and select a template from the pop up window. Select **OK**.

dt Apply Template	×		d١	Apply Template * Start date		×	
► Start date (p3/01/19 08:30:00 AM ↓ Broject template	pokup using list			03/01/19 08:30:00 AM			
Cancel	Project Templates AT Support Center - Goo Import/desupport.coman.edu/project Market	aga Drann – jogo Kt. Iengikar, listdo Typpam, target - tengikar, jdfoppam, target, sakue 4 Soppam.	× .	Large Project Template	Q ОК	(j) 	
	Treps: treps: 0.00 Y All C E Name Small Project Template Large Project Template		ŀ				
	Interimp Troject Itemplate - small Interimp Troject Itemplate EVENT TRANSING AND CREATE DP EVENT TRANSING AND CREATE DP EVENT TRANSING AND CREATE DP	ROUGET TIMPL IMPLATE IS					
		Image: All states of the second states tates of the second states of the second states of the sec					

Scroll to the bottom of the page. The project has been populated with standard project tasks which can be modified, deleted or new tasks added.

Save as New Template																		
	Project T	asks (11)	Sub Projects	Stories	Requirements	Decisions	Resource Plan	Cost Plans	Benefit Plans	Project Budget	Baselines	Status Report	s Risks	Issues	Project Change Requests	Time Cards	Expense Lines	
	E P	roject Tasl	ks New Ed	IL. G	o to Number	٣	Search										44 4	1 to 11 of 11 🕨 🍽 🖻
	F Parent = PRJ0010264																	
	0	Q	Number 🔺	≡ She	ort Description	≡ Depen	idency =	Planned start d	ate	ned end date	\equiv Planned	duration	Actual st	art date	\equiv Actual end date	■ Assigned t	o 🛛 🗏 State	≡ Percent complete
ł.		(i)	PRJTASK001076	Monito	oring		02/	18/19 08:00:00 /	M 02/18/1	9 04:00:00 PM	1 Day		(empty)		(empty)	(empty)	Pending	0%
		(i)	PRJTASK001076	5 Initital	ting		02/	18/19 08:00:00 A	M 02/18/1	9 04:00:00 PM	1 Day	0	(empty)		(empty)	(empty)	Pending	0%



DETAILS AND FINANCIALS

There are two sets of tabs in the Project Management module. The set at the top of the screen are high-level, where the bottom tabs are more detailed. Scroll up to the first set of tabs.

Details tab

Select the **Phase** from the dropdown list.

- Initiating Creating and approving project charter, setting up meetings, forming project team.
- **Planning** Creating a project plan, identifying key tasks and milestones, project kick-off meetings.
- **Executing** Delivering on projects tasks, building/implementing software, training materials, support processes, etc.
- **Delivering -** Go-live, post go-live monitoring and adjustment.
- Closing Preparing for Operational Gate review, project retrospectives.
- **Department** Leave blank for now.

If appropriate, select **Portfolio** or **Program** by clicking on the search icon and selecting from the resulting display list. (example: For a NERD project, select NERD as the program). Select **Save.**

Dates Details Business Case Financials	Score Notes Preferences			
Portfolio		Q Phase	Initiating •	
Program		Q Department	Network Operations Q	0
Investment Class	None	▼ Business Unit	Q	
Investment Type	Non	▼ Impacted Business Units		
Execution	Waterfall	▼ Business Capabilities		
		Business Applications		
Save Update Start project Delete				

Financials tab

Enter the **Budget Cost** (the total budget of the project).

The rest of the fields are automatically calculated from Cost and Expenses (next section).

Select Save.

Dates	Details	Business Case	Fit	nancials	Score	Notes	Preferences					
		Planned cost		s	v		0.00	Planned benefit	\$	Ŧ	0.00	
		Budget cost		S	Ŧ		10,000.00	Planned return	\$0.00			
		Actual cost		\$	Ŧ		0.00	Planned ROI %				
		Discount Rate %					0	Net present value	\$0.00			
		Forecast		\$0.00				Internal rate of return %				
Save	Update	Start project	t	Delete								
Delated	Links											



COST PLAN

Cost Plans tab

A cost plan breakdown captures the estimated cost for the project. Under the related links select the Cost Plans tab. The total cost will equal the amount put in the Budget field.

Select New.

Complete the following fields:

- Name of the cost plan.
- Select **Start** and **End Fiscal periods**.
- Enter **Unit Cost** and **Quantity**.
- Check the **Recurring** box if the expense is a recurring cost during the project.
- Select the **Cost type** (Select Capex for a capital expense or Opex for an operating expense).
- Select **Save** or **Submit**.

Hint - Rowan's fiscal year starts each July 1. So the first fiscal period (month) of the year is July. FY19: P01 would be July 2018)

* Name	Printed Training Materials	* Start fiscal period	FY19: P10 2
Project/Demand	PRJ0010536		FY19: P12
Financials			~
* Currency	USD Q	* Cost type	Other Opex R (
Unit cost	5	Total planned cost	0
Quantity	600	Total actual cost	0
Recurring		Forecast	0
Save Submit			

The cost plan will be listed in the Cost Plan tab.

atus Reports Risks Issues Project Change Requests Time Cards Expense Lines (1)
◄ ◄ 1 to 1 of 1 ▶ ▶ ►
period
3,000 50
Sum 3,000 Sum 50
i i

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EXPENSE LINES

Expense Lines tab

Expense lines keep track of what is actually spent. Expense lines can be formed from a cost plan. Right click on the cost plan (in the Cost Plan tab), and select Expense Plan.

Complete the following fields:

- Amount.
- Process Date.
- State (Pending or Processed).
- Short Description.
- Select Save or Submit.



	Expense Line EXP0058988					Ð	😆 ooo Save Update 🛧 🗸
1	Number	EXP0058988			Amount	\$ ¥ 50	
	Date	03/24/19			Process date	03/22/19 10:57:13 AM	
1	Rate Card		Q		Inherited		- 1
	Rate type				State	Processed	•
	Source ID	Project: Effort Reporting Banner 9 (Test)	Q	١	Summary type	Run Business	•
	Cost plan	Printed Training Materials	Q	0	Expense type	Орех	*
	Cost type	Other Opex	Q	١			_
	Short description	Training Materials created for Effort Training Class.					

In the Financial tab, you will now see the cost plan in the Planned Cost field and once an expense has been processed, it will be listed in the Actual Cost field.

Dates De	tails	Business Case	Financials	Score	Notes	Preferences	
		Pla	nned cost	\$	Ŧ		3,000.00
		В	udget cost	\$	Ŧ		10,000.00
		A	ctual cost	\$	Ŧ		50.00
		Discou	int Rate %				(
			Forecast	\$0.00			



REQUIREMENTS

Requirements tab

Requirements (optional) can either be high level achievements or detailed requirements. An example of a high level requirement - a working online billing system. An example of a detailed requirement - user interface that allows data entry.

Select the **Requirements** tab under the Related Links.

Select New.

Source is the name of the person requesting the requirement.

Owner is the IRT functional manager responsible for completing the work. Add **Estimated Effort**.

Short Description - For description suggestions, you can click the light bulb icon. **Description** - enter requirement details if known.

Select **Priority** (from Critical to Low). **States** are not currently being used.

Type (optional)

- **Business** details the specific need that is being addressed.
- Solution (Functional) describes the features of the solution.
- Solution (Non-Functional) defines the attributes of the system environment; identifies standards, for example, business rules, that the system must conform to; usually includes statements about reliability, scalability and security.
- **Quality** details the quality with which the functions are delivered, qualities that the solution must have, or constraints within which it must operate. Examples include: reliability, testability, maintain ability, availability.
- **Stakeholder** describes the needs of a particular stakeholder or group of stakeholders. They usually describe how someone wants to interact with the solution. defines WHAT each specific stakeholder/group needs from a solution.
- **Transition** detailed statements of capabilities or behaviors required only to enable transition from the current to the desired future state. Examples include: role changes, education, migration of data; needed in order transition to the new solution.

K ■ Requirement New record									Ø	11	<u> </u>
Number	DREQ0001005					Priority	None	,	•		
Source	Hegel, Marybeth	Q	(i)			State	Pending		•		
Owner	Hegel, Marybeth					Туре	Business		-		_
Estimated effort	Hours 0 00 00				Туре	Business	5			*	1
Short Description	LMS Evaluation					None -	-				1
Description	LMS will be evaluated to determine if a change wi	eded.	l.		Business Solution Solution Quality	i (Functional) (Non-Functional)					
Save Submit						Stakehol Transitio	lder m				

Select Submit.

If a requirement is being modified, select **Update** to save the modifications. Requirements can be modified after they are submitted.



PROJECT TASKS

Project Tasks tab

Tasks can be created in the Project Tasks Tab. Scroll to the second section of tabs and select Project Tasks. A green dot next to a task number indicates that sub- tasks exist for that task. Select **New**.

Project Tasks (11)		Sub Projects	Stories	Requirements	Decisions	Resource Plan	Cost Plans	Benefit Plans	Project Budget	Baselines (1
	roject Tasł	s New E	dit (So to Number	Ŧ	Search				
7	Parent = P	RJ0010264								
繱	Q	≡ Number 🔺		Short Description	on	≡ Depen	dency	■ Planned start	date ≡ P	lanned end da
i PRJTASK0010761 Monitoring								02/18/19 08:00:0	0 AM 05/3	1/19 04:00:00
								02/10/10 00:00:0	0.444 0.0273	0/10 04-00-00

Enter Short Description.

Select **Planned start** and **Planned end** dates from the calendar (duration is calculated). Or you can enter duration, then planned end date will be calculated.

Select **State** from the State dropdown field.

Assignment Groups have not yet been defined, though you can assign to an individual.

Check if it is a **Milestone** or **Key Milestone** if appropriate Note: A task must be a Key milestone to display on status reports.

Enter **Description**.

Select Save.

A new window will appear to create a resource plan for this task. Complete the resource plan information (see Resource Plans in this manual) or select **Submit** to return to the project.

✓ ■ Project Task New record [New view]			P	save Submit
* Short Description	Create Training Manual			
Number	PRJTASK0011540	State	Work in Progress]
Time constraint	Start on specific date	Assignment Group	Q	
Planned start date	03/19/24 12:00:00 AM	Assigned to	Q]
Planned end date	03/29/24 04:30:00 PM	Additional assignee list	A 2	-
Planned duration	Days 9 Hours 00 00 00	Milestone		
		Key milestone		
Description	Create a manual for the Effort Reporting train	ning and online resources.		1
Save Submit				

PLANNING CONSOLE

The planning console gives project managers a comprehensive view of all aspects of a project, including a hierarchical list of project tasks and the project Gantt chart and icons to perform tasks on the console.

To open the planning console in a project either select the Planning Console link in Related Links or right click on the header and select Planning Console.



1. Search for and select a project.

- 2. Insert and move tasks
- Inserts a new task above or below the selected task. You cannot insert a task above the top task
- Move the current task up or down in the hierarchy.
- Unindent or un-ident the selected task. This changes the parent and numbering of the task.
- This icon displays the critical path in red. Any delays of critical path tasks delay the finish date.

3. Double click any field to edit its values. Right click the field to see more actions.

4. Edit the State field by double clicking in the field and selecting a new state. You may need to change the column size to see the additional actions (i.e. State).



GANTT CHART

The Gantt chart on the planning console is a visual representation of a project timeline that shows start and end dates of tasks, and the dependencies between tasks.

Use Gantt charts to change task dates and dependencies, and assess the progress of the overall project.

Planning	Console						\checkmark	↑	←	\rightarrow	<u>^</u>				↓ ••
🅎 WBS	Short description		Dependency	State	Planned duration					Q1 2019 Februa	9 ▼ ry	March	Q2	2019 v April	1
4	✓ Training Project			Pending	11 Days										
1	✓ Monitoring	₽ •		Pending	11 Days										
1.1	Status Meetings	R •		Pending	1 Day						•			\square	0
1.2	New Task	•		Pending	1 Day						1	Baselines			
1.3	Status Reporting	•		Pending	1 Day						1	2/17/2010			
1.4	Issue Tracking	•		Pending	0 Seco							2/11/2019			- I
1.5	New Task	•		Pending	1 Day	+					O <mark>I</mark> O	Create new base	line		
1.6	Change Requests	•		Pending	1 Day						1	Other			
2	> Inititating	•		Pending	1 Day						1	Copy partial proj	ect		
3	Milestone: Project Scope Approval	•		Pending	0 Seco						•	Copy project			
4	PhaseGate: Initiation Complete	•		Pending	0 Seco						•	Show live feed			- 1
5	> Planning	•		Pending	1 Day						1	Plint			
6	PhaseGate: Planning Complete	•		Pending	0 Seco						•	Configure Gantt	View	_	_
7	> Executing	•		Pending	1 Day						1	Show date chang	ge		
8	Test Gate: Go / No Go	•		Pending	0 Seco						•	Show duration c	hange		
9	PhaseGate: Executing Complete	•		Pending	0 Seco						•	Show weekends			
												Hide external de	pendencies		
												Help			
												Walkthrough			
												Keyboard shortc	uts		

1. In the Gantt Chart, hover over the task (Blue bar) to view a summary of a task.

2. To change the planned start or end dates of a task, click on the planned duration (blue bar), and change the number of days. Then go to the blue bar, and then drag the left or right edge of the bar.

3. The **More Action** icon (...) includes a tutorial (Walkthrough), a list of keyboard shortcuts and the print function.



GANTT CHART

You can create dependencies in the planning console. An example of a dependency is when one task doesn't begin until another task is complete.

Select the carrot (triangle) next to a parent task, and you can see that all the tasks are numbered in the WBS column. Create a new task with the icons at the top middle of the chart (Add Task Below). Select **Enter.**

After creating the task, you are brought to the Dependency column. To create a dependency you can select the end of one task in the Gantt Chart and connect it with the beginning of the task that is dependent on it. Or you can enter the code below in the Dependency column.

- {WBS_number}{dependency_type}+{lag_time}
- WBS_number- the number of the Task dependency_type the type of dependency (see below
- lag_time amount of time in days, to delay the start of the dependent task. Could be positive or negative.

DEPENDENCY TYPE	EXAMPLE	DESCRIPTION
Finish to start	1.1fs+0	The task you are editing starts when task 1.1 is finished.
Start to start	1.1ss+0	Task 1.1 cannot finish until the task you are editing finishes.
Start to finish	1.1sf+0	Task 1.1 cannot start until the task you are editing finishes.
Finish to finish	1.1ff+0	The task you are editing cannot finish until task 1.1 finishes.

Planning	Console		Ę	3 🖬 ↓ ↑ ←	\rightarrow \land
₩BS	Short description	Dependency	State	Planned duration	March
4	✓ Effort Reporting Banner 9 (Test)		Work i	16 Days	
1	✓ Monitoring ! •		Pending	1 Day	1
1.1	Status Meetings ! •		Pending	1 Day	1
1.2	Status Reporting		Pending	1 Day	Ч
1.3	Update Project Management Plan 🕴 🌒	1.2ff+0	Pending	1 Day	H A
1.4	Issue Tracking		Pending	1 Day	
1.5	Risk Tracking		Pending	1 Day	
1.6	Change Requests		Pending	1 Day	1
2	∨ Inititating !•		Pending	1 Day	1
2.1	Demand Sizing		Pending	1 Day	+ 00
2.2	Schedule Tailoring Kickoff Meeting		Pending	1 Day	I
2.3	> Kickoff Meeting ! •		Pending	1 Day	1
2.4	Complete Project Charter		Pending	1 Day	I
2.5	Schedule Steering Committee Meetin; ! •		Pending	1 Day	I
2.6	Communicate information to the stee ! •		Pending	1 Day	ri i
2.7	Enter meetings in Marketplace	2.6ss+0	Pending	1 Day	×
2.8	This is my new task ! •	2.7ss+0	Pending	1 Day	L _M



GANTT CHART

a T	raining Project 🔹		Summary	y De	ails Planning Tracking	Status Report ZO	om and Dates 🛛 🖾
Planning	Console			C	$\Box ~ \downarrow ~ \uparrow ~ \leftarrow ~ \Rightarrow ~ \land$		000
🕎 wis	Short description	Dependency	State	Planned duration	January	Q12019 🔻	March
4	✓ Training Project		Pending	1 Day	+	00	
	> Monitoring	•	Pending	1 Day		1	
2	> Inititating	•	Pending	1 Day		1	
3	Milestone: Project Scope Approval	•	Pending	0 Seco		•	
4	PhaseGate: Initiation Complete	•	Pending	0 Seco			
5	> Planning	•	Pending	1 Day		1	
6	PhaseGate: Planning Complete	•	Pending	0 Seco		•	
7	> Executing	•	Pending	1 Day		1	

1. **Milestones** are project tasks with a duration of 0 and indicates that a phase is complete. If necessary, create dependencies between tasks and milestones so that a task does not start until a milestone has been reached.

Milestones are often used to indicate that a phase is completed or related tasks are completed, examples include initiation complete, coding completed, client acceptance testing completed, customer approved web page. A task must be indicated as a "**Key Milestone**" to be displayed on status reports.

To convert a task to milestone, right-click a task and select Convert to milestone. You can convert a task to a milestone only until it is not in Work in Progress state. Once work in progress, the option appears as greyed out for the task. The option is not available for a parent task. If a task has child tasks, the option is available only for the child tasks.

🚯 🚯

2. The icons above indicate whether the project schedule is calculated **automatically** or **manually**. This is set up in the project creation.

3. Use the funnel to select the columns to be displayed on the planning console, This also changes the WBS level as displayed on the console. If too many columns are displayed on the planning console, the Gantt chart may not display. Select the < under the left hand navigation to collapse it and give more room to the Gantt chart.

4. View more actions (...) to be performed on the project. You can create or view baselines, copy project, copy partial project, view live feed, print or apply template. You can change the settings to show or hide date change, duration change or weekends. You can also view Keyboard shortcuts and walkthroughs (see page 19)

5. Change Zoom Level and scroll to date.



RESOURCE PLAN

A resource plan is a request for people to work on your project. You can create a resource plan from a project or from a project task. You can edit and adjust the plan until you submit it for approval (Request button). Keep your resource plans at the highest level possible. See Appendix B for the workflow of a resource request.

Expense Lines

Resource Plan New

Project Tasks (12) Sub Projects Stories Requirements Decisions Resource Plan Cost Plan

▼ Search

Go to Number

In the Project Details form, select the **Resource Plan** tab in the second set of tabs under Related Links).

Select New.

Resource Plan New record [N	lew view]				の言い	ooo Sa	ve
Number	RPLN0001060			Nam	e Effort Reporting - Hegel		
Resource type	User resource	•		* Tas	sk PRJ0010324	Q	G
* User resource	Hegel, Marybeth	Q	Ō	* Start da	03/01/19		
Request type	Hours	•		* End dat	te 05/31/19		
+ Planned hours		20		Allocation typ	Monthly	•	
				Allocation sprea	d Even	•	
				Sta	te Planning		

Fill in the fields as appropriate.

Resource Type - Category of resource. Select User Resource (Group resources are not yet defined). If you select User resource in the Resource type field, the User resource field is displayed. Select the User Resource (by last name).

Request Type - Hours, FTE or Person Days

Amount of either Planned hours or FTE or Person Days

Name of the resource plan ("Name of Project" - "Last Name of Resource").

Task - select from the drop down list. Note the task starting with PRJxxxxxx is the project. If that task is selected, the resource is requested for the entire project unless you specify a start and end date that differs from the project dates.

Start and End dates

Allocation Type, Allocation spread

Select Save or Submit to continue working on the plan.

Once you have completed the resource request, then select **Request**. You will then meet with the resource manager to review and approve the plan. (see Appendix B for the resource request workflow).



RESOURCE PLAN

Another way to create a resource plan is in the actual Project Task.

Scroll under Related links and select the **Project Task** tab. Select one of the project tasks.

In the project task select the **Resource Plans** tab.

Select New.

Complete the form as shown on the previous page.

t Tasks (12) Sub Projects Stories Requirements Decisions Resource Plan Cost Plans Benefit P t Change Requests Time Cards Expense Lines ▼ Search Go to Number Project Tasks New Edit.. nt = PRJ0010264 Number Short Description Dependency Planned start date = Monitoring 02/18/19 08:00:00 AM 05 PRJTASK0010761 02/18/19 08:00:00 AM Inititating 02 PR.ITASK0010766

The Project manager will email the Resource Plan number to the **Resource Manager**. The Resource Manager will select **Requested** under **Resource Plans** in the Application Navigator, and then search for the Resource Plan number. Click on the plan number and the resource plan will open.

Rowan University IRT Support Cen		
	Resource Plans New Go	to Number 🔻 Search
e 🕇 ()	All>State = Requested .or. Exte	ension = Requested
Resource	🔯 🔍 ≡ Number 🔺	≡ Name
Getting Started	(i) <u>RPLN0001007</u>	Hours for Status Meetings for Bob Penn
▼ Resource Plans	(i) <u>RPLN0001009</u>	Hours for Status Meetings - NSS 0007 Vul
Create New		
All		
Requested		

Select Confirm and Allocate from the top of the page. Select Save or Update.

K Resource Plan RPLN0001059			1 to 000	Save Upd	late Confirm Confirm and Allocate	Reject Delete	$\uparrow \ \downarrow$
Name	Test - Hegel			Number	RPLN0001059		A
* Start date	03/01/19			∦ Task	PRJ0010324	Q (j)	- 1
* End date	04/30/19	Ē		State	Requested		- 1
Resource Details Reque	est Details Allocation Config Notes						- 1
Resource type	User resource	v					
* User resource	Hegel, Marybeth	Q (j)					
Save Update Co	nfirm Confirm and Allocate Reject	Delete					



ISSUES AND RISKS

The **Issues, Risk and Change Control** tabs are for project information distribution. They are put in place during the planning phase and will be used throughout the Execution and the Monitoring/Control Phases.

Project Issues describe something that is happening. Issues are events that are currently having a negative impact on the project. We track project issues so that we may manage them and limit the negative consequences.

Project 1	Fasks (12)	Sub Projects	Stories	Requirements	Decisions	Resource Plan	Cost Plans	Benefit Plans	Project Budget	Baselines (1)	Status Reports	Risks	Issues
Project (Change Requ	ests Time Ca	ards Ex	pense Lines									
	ssues New	Go to	Number	▼ Sea	rch								
7	Parent = PR.	0010264											
4	Q ≡ Number ▲ ≡ Short D				E Short Desc	iption \equiv Priority \equiv Assigned to					to		≡ State

Select the Project and scroll to the second set of tabs (under Related Links) and select the Issues tab. Select **New**.

Complete the fields and then select **Submit**.

	Number	ISU0010002			State	Work in Progress	٠			
	Priority	3 - Moderate	•	1	ssigned to	Hegel, Marybeth	Q	Þ		
	Impact	3 - Low	٣		Parent	PRJ0010264	Q	()		
Short Description No computers are working in Training Room B.										
	Description	Something happened to all the computers in training room B and none of them are working, so we can't do any training classes in there.								
	Work Notes	Workshop they would look into	the problem.							

Priority - The priority of the issue (High, Medium or Low), as defined by the ServiceNow priority matrix https://wiki.med.umich.edu/display/UMHSHELPDESK/ServiceNow+-+Priority+Matrix

State: Select the appropriate state of the issue, as defined below.

- Pending The issue is not currently impacting the project, but will be soon.
- **Open** The issue is currently impacting the project, but no one is working on resolving the issue.
- Work in Progress The issue is currently impacting the project and someone is actively working on resolving it.
- **Closed Complete** The issue is no longer impacting the project as a result of intervention by the project team or project manager.
- **Closed Incomplete** The issue is no longer impacting the project, but there may still be lingering risks related to it.
- **Closed Skipped** The issue is no longer impacting the project, and nothing was done to intervene.

Assigned to - The person responsible for managing the issue.

Short Description - A simple description of the issue.

Description - A longer, more detailed description of the issue.

Work Notes - The work notes field can be used to capture ongoing information related to the mitigation of the issue.

Manage your issues throughout the lifecycle of the project. As conditions change, update your issue records. Was the issue resolved? Change the state of the issue to reflect that.



ISSUES AND RISKS

Project Risks describe something that might happen. Risks are uncertain events that, if they occur, will have a negative impact on the project. We track project risks so that we may manage them and avoid the negative consequences. Risks can be avoided, mitigated, or accepted.

Project Tasks (12) Sub Projects Stories Requirements Decisions Resource Plan Cost Plans Benefit Plans Project Budget Baselines (1) Status Reports Risk													
Project Change Requests Time Cards Expense Lines													
E Risks New Go to Short description V Search													
Task = PRJ0010264													
\$\$ Q	■ Short descript	ion	:	Probability			≡ Sta	te					

Select the Project and scroll to the second set of tabs (under Related Links) and select the Risks tab. Select **New.**

< Risk New record	1				n 🕂 👓	Save Submit				
Task	PRJ0010264	Q (1)	Probability	Moderate	٣	*				
Estimated cost	\$ *	500.00	State	Pending	Ŧ					
∦ Short description	Software may be dela	ioftware may be delayed								
Mitigation plan	If the software is delay	If the software is delayed a demo could be done on the Cloud version.								
Save Submit										

Complete the fields and then select **Submit**:

Estimated Cost - The estimated financial impact to the project if the risk happens (if applicable).

Probability - The probability that the Risk will happen - Absolute, High, Moderate, or Low

State - Select the appropriate state of the risk, as defined below.

- **Pending** The risk hasn't happened yet, but might in the future.
- Achieved The risk has come true and is now an issue. ServiceNow will not automatically create an issue if you set the state to achieved you will need to manually create a new Issue to describe this.
- Not Achieved The risk has been successfully mitigated or avoided.

Short description - A simple description of the risk.

Mitigation plan - The plan and action to mitigate or avoid the risk.

Manage your risks throughout the lifecycle of the project. As conditions change, update your risk records. Was the risk achieved or mitigated? Change the state of the risk to reflect it.



DECISIONS LOG

The purpose of the **Decisions Log** is to document all major decisions that are made on a project. It should include, at minimum, description of the decision, what date the decision was made, who agreed to the decision, and why the decision was made.

Project	Tasks (12)	Sub Projects	Stories	Requirements	Decisions	Resource Plan	Cost Plans	Benefit Plans	Project Budget	Baselines (1)	
Status F	Reports F	Risks Issues	Project C	hange Requests	Time Cards	Expense Lines					
	Decisior s	New Go to	Numbe	r ▼ S	earch						-
	Parent = P	RJ0010264									
繱	Q	≣ Numbe	r 🔺	=	Short Descrip	tion				≡ State	

Select the Project and scroll to the second set of tabs (under Related Links). Select the **Decisions** tab. Select **New**.

< E Decision New record	d		Ø 👬	ooo Save Submit
Number	DCSN0001001	State	Pending •	*
Requestor	Hegel, Marybeth Q	(i) Approval Required	No	
Due date	02/23/19 01:22:45 PM	9		
Short Description	The steering committee decided that a	t a an addition month of training is needed.		8
Save Submit				

Complete the appropriate fields and click **Submit.**



CLOSE A PROJECT

Project closure activities include confirming that work is done per the requirements, gaining acceptance and sign-off for various project artifacts, releasing resources and completing all financial transactions. Within ServiceNow there are also a handful of activities that should be completed.

< Project Training Project	oject	∅ ∧ ∄	ooo Follow	- Save Update	Start project Delete	\downarrow
Manage Attachments (2	l): 🛃 2019-02-15_15-49-10.png [rer	ame] [view] 📓 2019-0	2-15_15-51-08.png [renai	me] [view]		_
Initiating	Planning	Exect	uting	Delivering	Closing	
* Project Name	Training Project		Number	PRJ0010264		
Project manager	Hegel, Marybeth	Q ()	Percent complete		0	
Status	Green	•	State	Pending	*	
			Priority	Pending Open Work in Progress		
Description				Closed Complete Closed Incomplete Closed Skipped		
Dates Details Bu	iness Case Financials Score	Notes Preferences				
Schedule	Project Management Schedule				Q. (j)	

Open a project. On the Project form, change the **State** field to one of the closed states:

Closed Complete the project is finished and all tasks are complete.

Closed Incomplete the project is finished, but tasks remain unfinished.

Closed Skipped the project was abandoned.

Select Save.

Notify the resource manager that project is closed and the resources are no longer required. On the **Details** tab, select **Closing** from the Phase dropdown list.

Select Save.

Dates Details Bus	iness Case	Financials	Score	Notes	Preferences				
Portfolio				Q		Phase	Initiating	•	
Program				Q		Department	Initiating Planning Executing		0
Investment Class	None			۳		Business Unit	Delivering		
Investment Type	- None			٠		Impacted Business Units	⊕		
Execution type	Waterfall			۳		Business Capabilities	⇔		
						Business Applications	⇔		
Save Update	Start project	Delete							

PROJECT WORKBENCH TABS

Select either **Planning Console**, **Project Workbench** or **Status report** from Related Links to see the Project Workbench tabs.

Related Links Create Agile Phase Create Test Phase Planning Console Project Workbench Status Report Create Baseline Save as New Template

金 Ne	w Project - MB	•	Summar	y Deta	ails Pl	anning	Tracking	Status Report
Status			Perce	Percent Complete			Open Risks	0
Green			0 %			0		
Delayed	Tasks and Milest	ones				Upcon	ning Tasks (until n	ext 2 weeks) With
	Number	Short Description	Planned end date 🔻	Assigned to	State	*	Number 🔺	Short Description
(i)	PRJTASK0011558	Status Meetings	03/29/19 04:30:00	(empty)	Pending	G	PR ITASKOOTISS	Monitoring

The **Summary** tab is a dashboard which displays preconfigured widgets and reports to track the progress on various aspects of a project such as open risks, actual cost, and delayed milestones.

The **Details** tab opens the project form and defines important aspects of the project.

	Summary	Details	Planning Tracking	g Status Report	Ŀ
Project PMO Training			₽ √ ≌	Follow - Save Updat	e Start project Delet
Initiating	Planning		Executing	Delivering	Closing
⇒ Project Name	PMO Training	Q 8	ğ Number	PRJ0010124	
Project manager	Mocini, Susan	Q ()	Percent complete		0
Status	Green	•	State	Pending	•
			Priority	None	
Description	1				

🙆 P	MO Training							
		Summary D	atails Pla	anning	Tracking Sta	tus Report		\checkmark
Planning	Console				$\uparrow \leftarrow$		Ĺ,	000
₩BS	Short description		Dependency	State	Planned duration		January	
4	V PMO Training	1		Pending	4 Days	+	0	^
1	> Monitoring	1.		Pending	1 Day		1	
2	> Inititating	1.•		Pending	4 Days			

The **Tracking** tab enables you to manage the project in the project workbench.

The **Planning** tab opens the project in the planning console.

PMO Training	•					
	Summary	Details	Planning	Tracking	Status Report	
Project Workbench						+ (= •••
0% Complete This is a manual project. Task rel date or duration changes update	lationships do not cha the project dates and	ange task dates. d duration.	Only task			End date
Cosing New Task Planning						
Project Tasks (Workbench view	w] Search for text		earch		√ 44 4	1 tolof1 🕨 🕨
All>Parent = PRJTASK00104	52					

 W5-5007 Implement Infrastruc.
 Sammary
 Details
 Planning
 Tacking
 Tacking
 Texts Import

 11.00.13
 V
 Image: Sammary
 Planning
 Tacking
 Texts Import
 Texts Imp

The **Status Report** tab displays the project status reports and executive summary.



PROJECT WORKSPACE

The Project Workspace enables the project manager to define, plan, track, and monitor a project in a single location. Project managers can also review the status, exceptions, and KPIs (key performance indicators) in the workspace to take further actions for the project.



Row 1 displays project name, state, project manager name, and important project dates. The displayed project dates are based on the current state of the project:

- If the project state is Pending or Open, planned start date and planned end date are displayed.
- If the project state is Work in Progress, actual start date and planned end date are displayed.
- If the project state is Closed, actual start date and actual end date are displayed.

Row 2 displays Status, Percent complete, and Phase.

Row 3 displays the following project information based on the current state of the project. Open risks, open issues, and overdue tasks of the project under Updates heading. Date and short description of the last missed milestone task under Last missed milestone heading.



APPENDIX A CREATE TEMPLATES

A project template defines the basic structure of a project. Project templates can include project tasks and sub-tasks, attachments, checklists, and other project information.

(F template	Create from	m an existing template	.	
Change Standard Change	Under the !	Project module in the A	Application Navigator	select Template.
All Templates Project Projects	Open the d	lesired project template	2.	
Templates				
		All Class = Project Template		
				≡ Name
		i <u>TPL01001</u>		Small Project Template
		(j) <u>TPL01002</u>		Large Project Template
Template	Project Name			
	choose field			
Save Update Delete		- Select Copy Templ	ate under Related Lin	ks
Related Links				
Create Project Copy Template			Copy template	
		1	* Template name	
			Training Project Template - Small	
			Description Template for small traning projects	
The Copy template dialo	og box opens. Fi	ll in the new (unique)	Template	
template name and a bri	ef description.	Click OK .	Small Project Template	
				Cancel

Make changes needed for new template. Add fields (select choose field dropdown) or remove fields (select the X next to the field) as needed. Select **Save** to stay on the form and continue working or **Update** to complete and leave the template.

< Project Template Training Project Tem	mplate - Small			Ø	ŧ	ooo Save	Update	Delete		
	Name	Training Project Template - Small								
	Table	Project [pm_project]	1_project]							
	Description	Template for small traning projects	te for small traning projects							
Data								~		
	Template	Project Name 🔻	taffe export project				×			
		choose field 🔻	value							
Save Update Delete										



APPENDIX A CREATE TEMPLATES

Create a Template - From an Existing Project

Under the Project module in the Application Navigator, select All.



Scroll down to **Related Links** and select **Save as New Template.**

Save Update Start project Delet Related Links Create Agile Phase Create Test Phase Planning Console Project Workbench Status Report Create Baseline Save as New Template Select the number of the desired project.

	Projects	New Go to	Number Search
P	All >	Task type = Proje	ct
<u>نې</u>	Q	E Number 🔺	≡ Project Name
	i	PRJ0010047	NSS-0007 Implement Infrastructure Security Scanning & Vulnerabi Tenable)
	i	PRJ0010078	Camden Joint Health Sciences Centet

The **Create Template** dialog box opens. Fill in the new (unique) template name and a brief description. Select **OK**.

Create template)	×
★ Template name		
Training Template		
Description		
template for all training projects.		
Project name		
PRJ0010264		
	Cancel	

Make changes needed for new template. Add fields (select choose field dropdown) or remove fields (select the X next to the field) as needed. Select **Save** to stay on the form and continue working or **Update** to complete and leave the template.

Project Template Training Template					Ø	ŧ	000	Save	Update	Dele
Manage Attachments (2): 🔊	2019-02-15_15-49-1	0.png [rename] [view] 📓 2019-02-15_1	5_15-51-08.	8.png [rename] [view]						
	Name Translog TempLate									
	Table	Project [pm_project]								
	Description	template for all training projects.								
Data										$\mathbf{\vee}$
	Template	Project manager	▼ He	iegel, Marybeth	٩				×	
		Project Name	▼ Tra	raining Project					×	
		choose field	▼ -v	value						
Save Update Delete	2									

APPENDIX A CREATE TEMPLATES

Create a template - From a Microsoft Project project.

Under the Project module in the Application Navigator, select Import.



Click **Choose File** to select a Microsoft Project file.

To import the Microsoft project as a new project, select the **Create new project** option. Select Import.



To import the Microsoft project as a subset of an active, existing project or task select **Update an ex-isting project**. Search for the existing project (only active projects will be on the list).

Microsoft Project Import	
select an mpp file:	
Choose File No file chosen	
Create new project	
Update an existing project	
	Q

Important Notes on importing from Microsoft Project

- The Project Management application sets the time constraint for all imported tasks to Start on specific date irrespective of their time constraint in Microsoft Project.
- The resource name in Microsoft Project should map to the name of the user in the instance.

The following calendar elements from Microsoft Project are not imported into Project Management:

- Project calendars
- User calendars
- Schedules

While importing a Microsoft Project file into ServiceNow, the import will fail if:

- The project with tasks was created in ServiceNow prior to import.
- You create new tasks in ServiceNow in a project which was imported from Microsoft Project earlier, and then reimport.



APPENDIX B - PHASES OF A RESOURCE PLAN

Create resource plans to ask for resources. Resource managers review, can modify and approve resource plans.

All resource plans for **that project** appear on the Resource Plan tab of the Project page.

Resource Plans progress through several phases.

Planning- Planning is the default state when a resource requester creates a resource plan. Any plan in this state can be edited. Select **Save** or **Submit** to continue in the plannin state.



Requested - Resource requester submits a resource plan for resource managers' review by clicking **Request.** The resource plan then moves into the Requested state. Resource managers confirm and allocate resources or reject the plan. The resource requester can request a group, specific users in a group, or a specific user to work on the selected task.



After you submit the plan for review, a resource manager can confirm and allocate the requested users. If more than one user or groups are required by the task, multiple resource plans will be needed for the given task.

Rejected - Resource manager rejects a resource plan by clicking **Reject**. The resource plan then moves into the Rejected state. Rejected plans stay in that state until changes are made and the requester can re-request the resources.



APPENDIX B - PHASES OF A RESOURCE PLAN

Confirmed - After the plan is requested, the resource manager can block/confirm the resources for future projects and demands. The resource plan then moves into the **Confirmed** state. Only a resource manager can modify the plans in Confirmed state. Soft allocations are created when the resource plan moves to the Confirmed state.

Allocated - After the plan is confirmed, the resource manager can review the plans, view availability, change resource preferences and perform the resource allocation. Then the plan becomes allocated. Once a plan is in the **Allocated** state, it can only be canceled, completed, or modified by the resource manager. Soft allocations are converted to hard allocations when the resource plan moves to the Allocated state. You can also set a plan to the Allocated state directly from the Requested state using Confirm and Allocate option.



Completed - After the allocation of resources if there are no more changes, a resource manager can change the status of the plan to complete.

Canceled - An allocated plan can be canceled if the allocations are no longer required. This removes all future allocations. The past allocations are canceled or removed.



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APPENDIX C - NOTES, ATTACHMENTS & BUSINESS CASE

Attach a File

Project artifacts and documents should be attached to the project record in ServiceNow. You can upload a file as an attachment to a project. Attachment file size is not limited by default. However, uploading large attachments can cause issues with the user's active session on the instance. Empty attachments (file size of 0 kb) are not supported.

1. Choose the **paperclip icon** at the top menu.



2. Select Choose **File**. Navigate and find the file on your computer. Select **Open**.



3. Close the popup window.

Attachments	\times
Choose Files No file chosen	
2019-02-15_15-49-10.png [rename] [view]	

4. Files will appear at the top of the form.

< ≡	Project Training Project
Manage Atta	chments (1): 2019-02-15_15-49-10.png [rename][view]

Notes tab

Click on the Notes tab to add a link to a document stored in another location. Paste the link in the **Work Notes**. Select **Save**.

Dates	Details Bus	siness Case Financials	Score Notes Preferences		
		Watch List	8	Work Notes List 🗟 🚊	
		* Work Notes	https://irt.rowan.edu/services/trai	ning/index.html	
				Post	
		Activities: 1	HM Hegel, Marybeth	Field changes + 02/15/19 09:29:28 AM	7
			Impact 3 - Lov Opened by Hegel State Open	r Marybeth	
Save	Update	Start project Delete			

Business Case tab

The business case tab is currently optional, but complete the form if you know the information requested.



GLOSSARY

Program - is a group of projects that will attain a greater goal once all projects are completed than each individual project will attain on its own.

Portfolio - is a set of programs that will attain a greater goal.

Milestones are project tasks with a duration of 0 and indicates that a phase is complete. If necessary, create dependencies between tasks and milestones so that a task does not start until a milestone has been reached.

Milestones are often used to indicate that a phase is completed or related tasks are completed, examples include initiation complete, coding completed, client acceptance testing completed, customer approved web page. A task must be indicated as a "Key Milestone" to be displayed on status reports. To convert a task to milestone, right-click a task and select Convert to milestone. You can convert a task to a milestone only until it is not in Work in Progress state. Once work in progress, the option appears as greyed out for the task. The option is not available for a parent task. If a task has child tasks, the option is available only for the child tasks.

Manual project - Changes to the dates, duration, or relationships of a project task do not automatically update other tasks.

Automatic project - Change to the dates, duration, or relationships of a project task automatically updates the dates of other tasks in the project.

Copex - Captial expenses which will be the case with most projects. An example is the purchase of software.

Opex - Operational expenses. An example is the maintenance agreement of the above software. This is not usually included in the project, but sometimes may be included for a short duration.



ADDITIONAL RESOURCES

Project Management Documentation from ServiceNow -

https://docs.servicenow.com/bundle/kingston-it-business-management/page/product/project-management/ concept/c_ProjectApplicationOverview.html

Overview of ServiceNow Project Management Application -

https://www.youtube.com/watch?v=HWd9YSJP8Ps



