Rowan University
INFORMATION RESOURCES & TECHNOLOGY

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PROJECT MANAGEMENT
SERVICENOW

APRIL 2019

servicenow

ServiceNow Project Management

A Project is a temporary activity with a defined beginning and end. The ServiceNow Project Portfolio Management (PPM) application tracks and manages all aspects of projects.

Goals of this Guide:

This guide will guide you in the basic information needed for the Project Management Module such as creating a project, entering budget costs and details, viewing the Planning console, entering costs and expenses.

CREATE PROJECT

1. Enter Project Name (from intake meeting).
2. Enter Project Manager.
3. State - keep at pending until all data entry is complete.
4. Calculation - select Automatic.
5. Dates - be sure to changed planned start date if project is in progress.
6. Select Save.
7. In the Details tab select the Phase (intiating etc…) and Execution Type (Waterfall). Save.

RESOURCE PLAN

1. A resource plan is a request for people to work on your project. Select the Resource Plan tab and select New
2. Select User resource as the User type. Select the name of the person in User resource.
3. Name the resource plan "Project name - Resource Last Name".
4. Save or if ready to request, select Request.
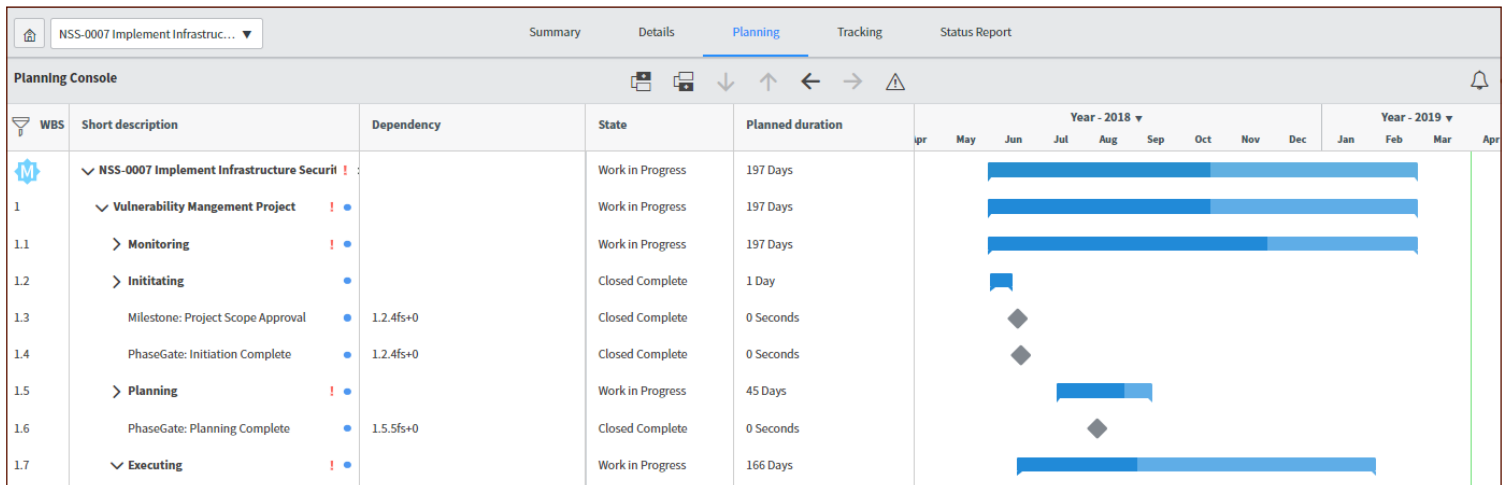5. Contact the resource's manager to review request.

FINANCIALS

1. In Financials tab enter Budget cost. Save.
2. In Cost Plan tab - select New, enter name of item, fiscal period it will be purchased in, unit cost and quantity and cost type. Save.
3. After Invoice is approved for a purchase, enter Expense line. Right click on the Cost plan and select Create Expense Line. Enter Amount, Processed date. Once the expense has been taken from the project budget and processed, change the State from Pending to Processed. Enter a Short description. Save.

Dates	Details	Business Case	Financials	Score	Notes	Preferences

Planned cost	$ ▼	3,000.00
Budget cost	$ ▼	10,000.00
Actual cost	$ ▼	50.00
Discount Rate %		0
Forecast	$0.00	

Save   Update   Start project   Delete

	WBS	Short description	Dependency	State	Planned duration	Year - 2018 ▼									Year - 2019 ▼			
						Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
M		⌄ NSS-0007 Implement Infrastructure Securit !		Work in Progress	197 Days													
	1	⌄ Vulnerability Mangement Project ! ●		Work in Progress	197 Days													
	1.1	⌄ Monitoring ! ●		Work in Progress	197 Days													
	1.2	⌄ Inititating ●		Closed Complete	1 Day													
	1.3	Milestone: Project Scope Approval ●	1.2.4fs+0	Closed Complete	0 Seconds													
	1.4	PhaseGate: Initiation Complete ●	1.2.4fs+0	Closed Complete	0 Seconds													
	1.5	⌄ Planning ! ●		Work in Progress	45 Days													
	1.6	PhaseGate: Planning Complete ●	1.5.5fs+0	Closed Complete	0 Seconds													
	1.7	⌄ Executing ! ●		Work in Progress	166 Days													

Planning Console

NSS-0007 Implement Infrastruc... ▼   Summary   Details   Planning   Tracking   Status Report

PLANNING CONSOLE & GANTT CHART

1. Open Planning Console under Related Links.
2. Select a task under the Short Description column.
3. Using the icons at the top middle of the screen, add a new task, before or after the selected task. Use the fulnnel to add columns.
4. 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.
5. Use Gantt charts to change task dates and dependencies, and assess the progress of the overall project.