Rowan University
INFORMATION RESOURCES & TECHNOLOGY

SERVICENOW
PROJECT MANAGEMENT

TRAINING MANUAL

MAY 2019

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irt.rowan.edu

V1.3 5/2019

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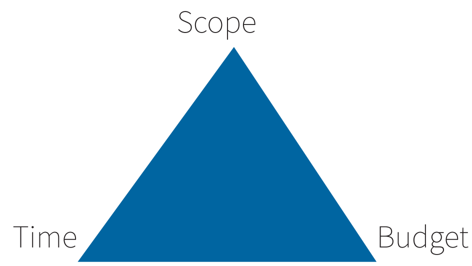
Introduction to Project Management

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.

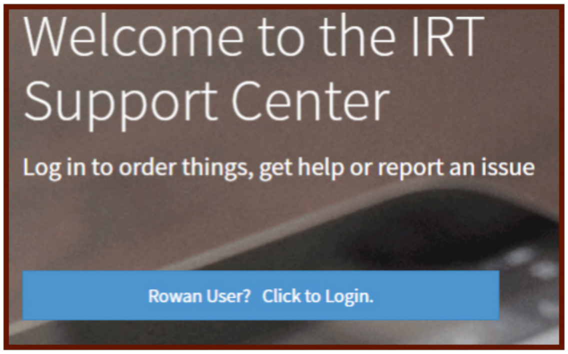
Objectives

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

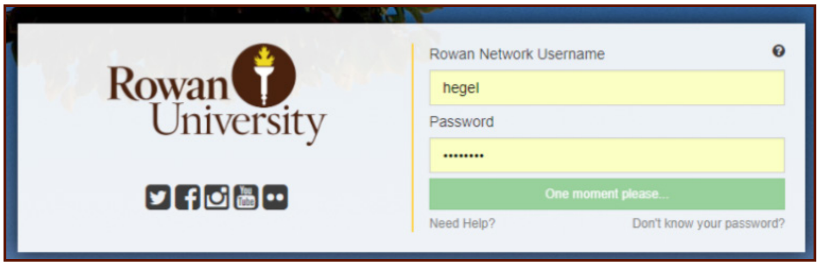
Chrome is the recommended browser.



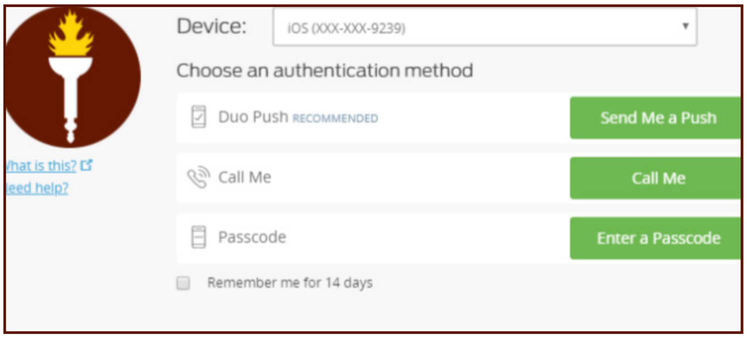
For training class go to https://dev.support.rowan.edu

In production, go to https://support.rowan.edu

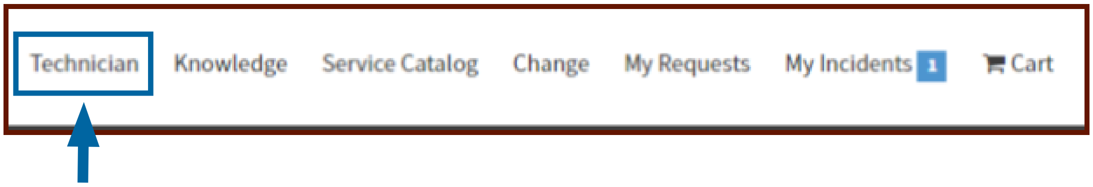
Click to Login.



Login with Rowan Credentials.



Complete Duo Authenication if prompted.

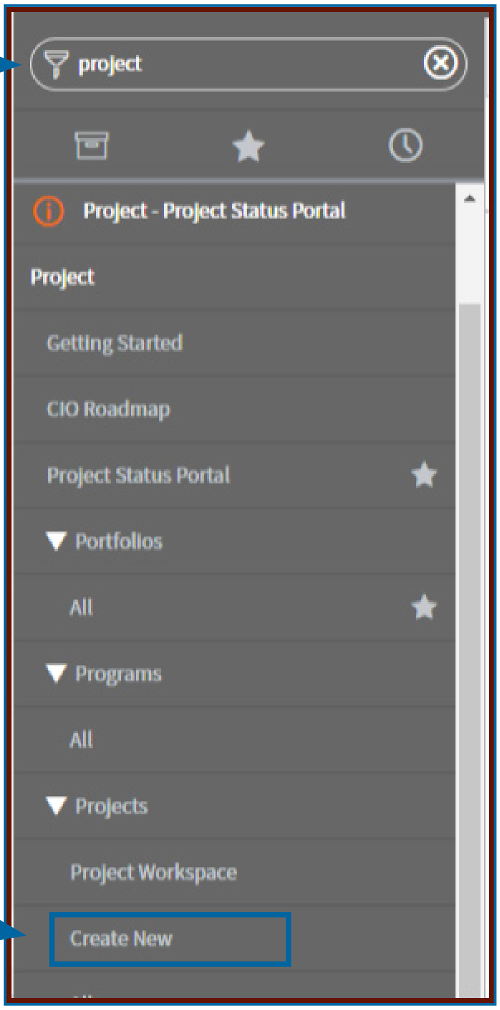


Select Technician from the top menu.

APPLICATION NAVIGATOR

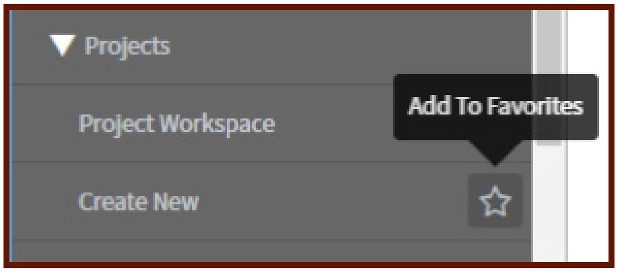
To create a new project, search for Project in the Application Navigator Search field in the menu on the left side of the page. Enter.

Application Navigator

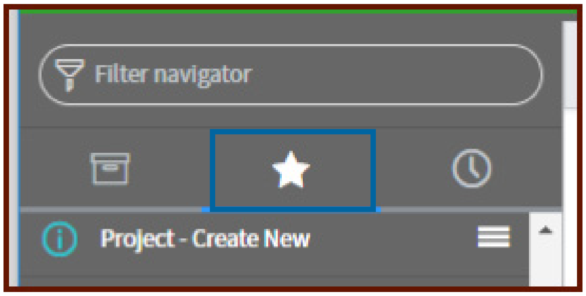


Under Projects select Create New.

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):

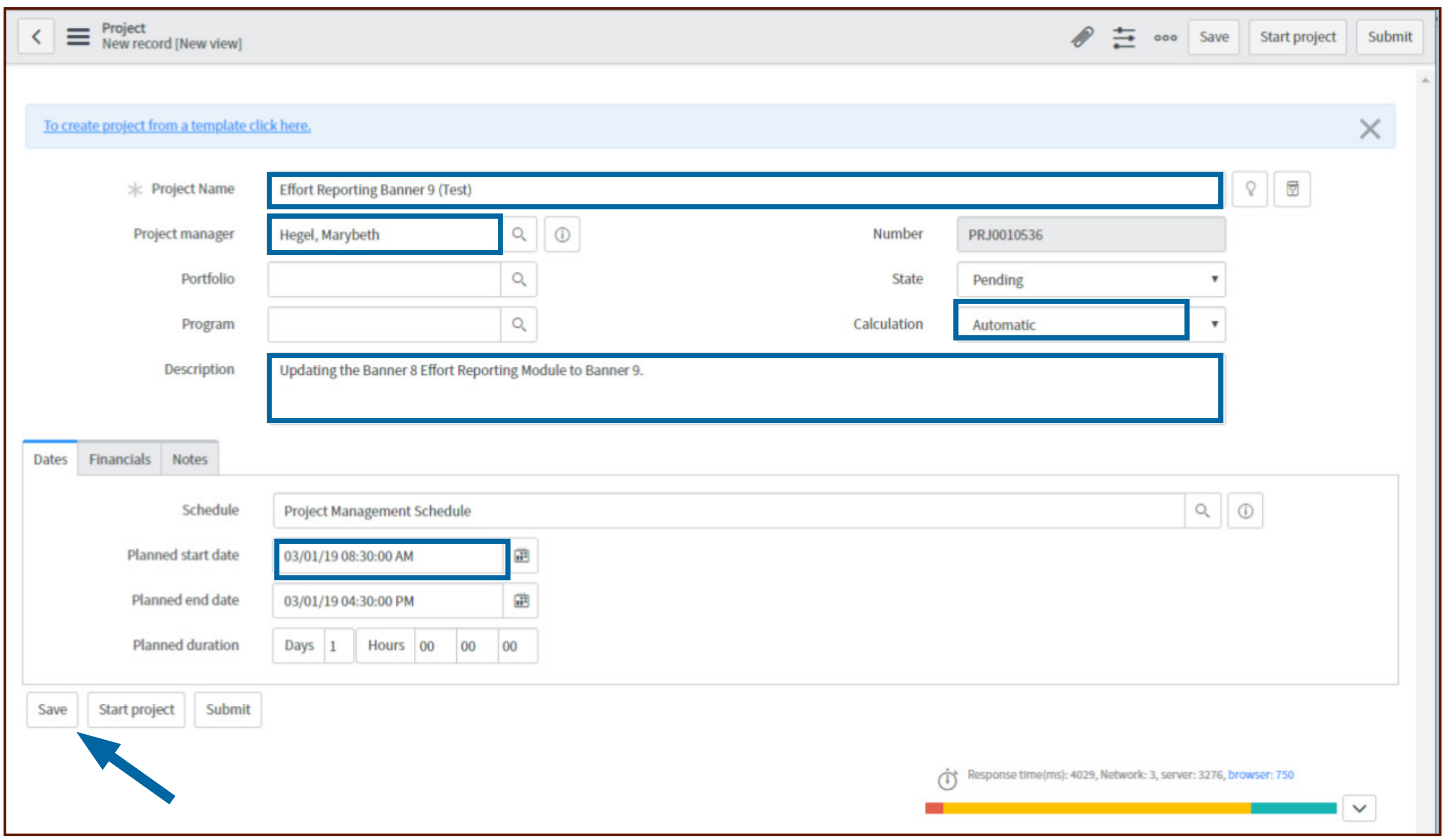
- Manual project: Changes to the dates, duration, or relationships of a project task do not automatically update other tasks.
- Automatic project: Change to the dates, duration, or relationships of a project task automatically updates the dates of other tasks in the project.

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

Dates Tab

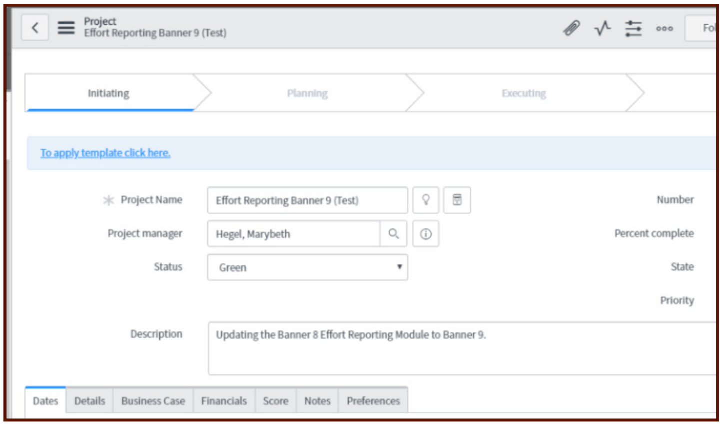
Planned start date - Click the calendar icon, and search through the months, click on the desired day and then click the green check mark to confirm. (If you don't put in the start date here, it will automatically be assigned today's date, and it can not be changed later).

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.**



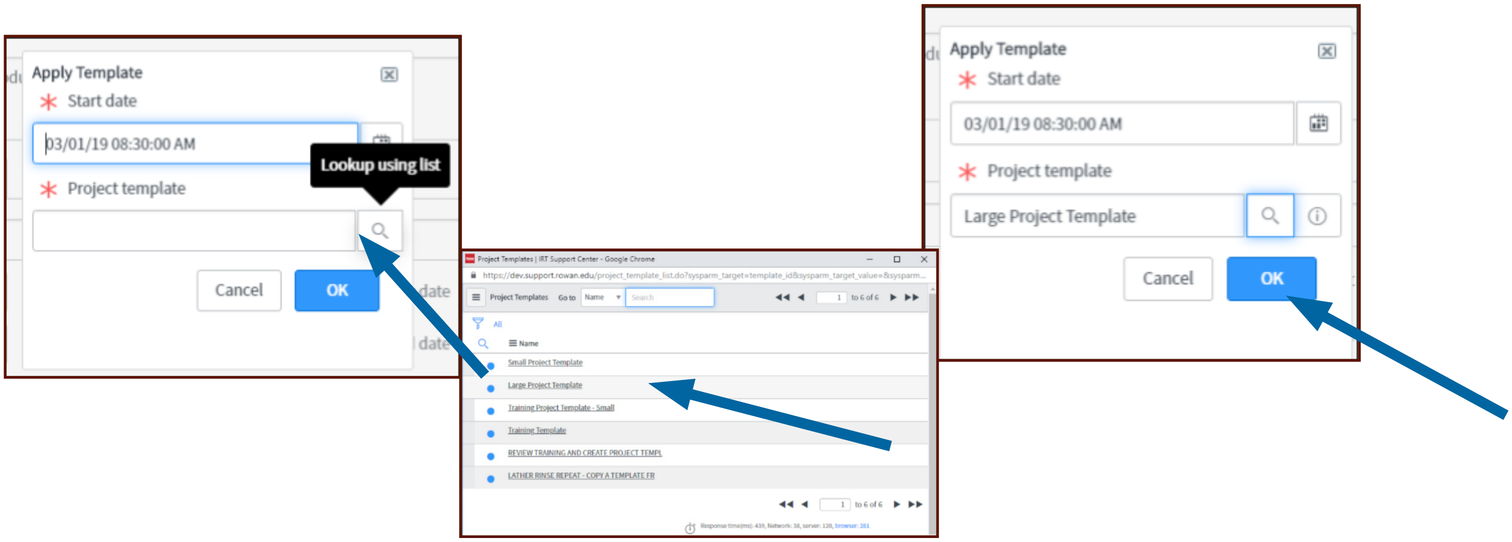
APPLY A TEMPLATE

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.

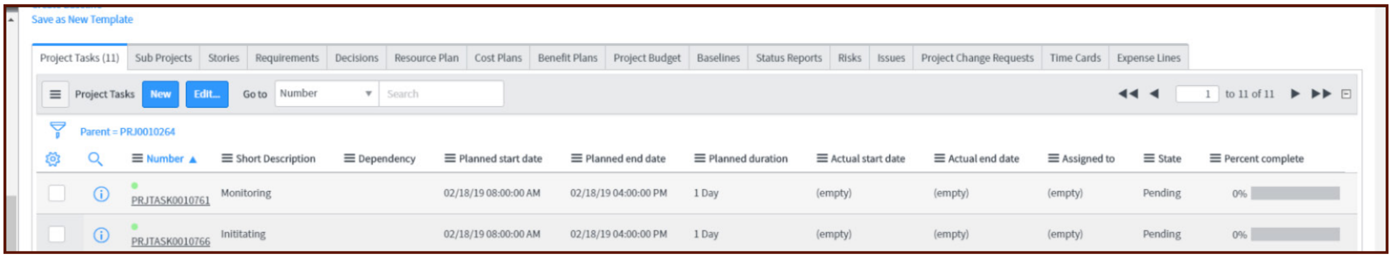


In the upper left of the screen, just above project name, select "To apply template click here".

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



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.



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DETAILS AND FINANCIALS

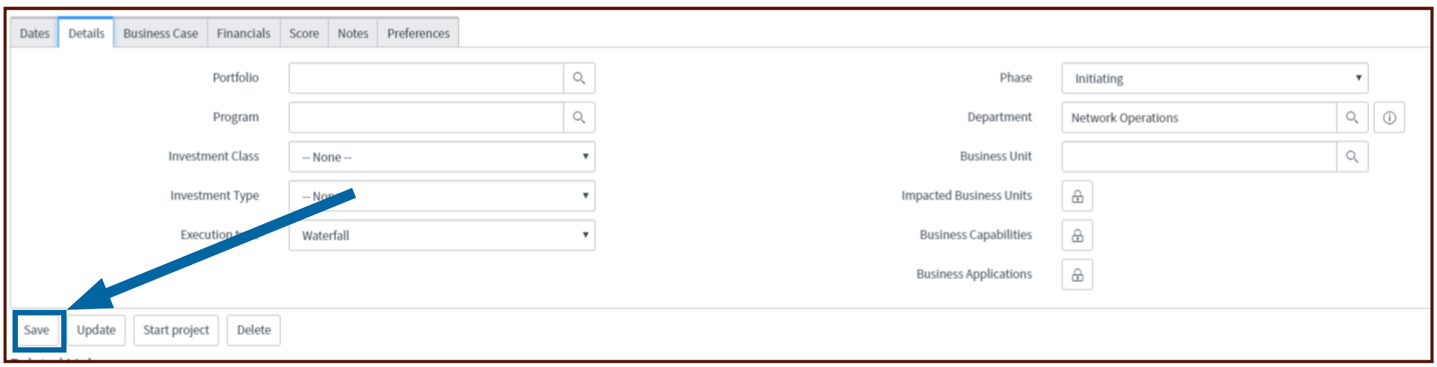
There are two sets of tabs in the Project Management module. The set at the top of the screen are high-level, where the bottom tabs are more detailed. Scroll up to the first set of tabs.

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.**

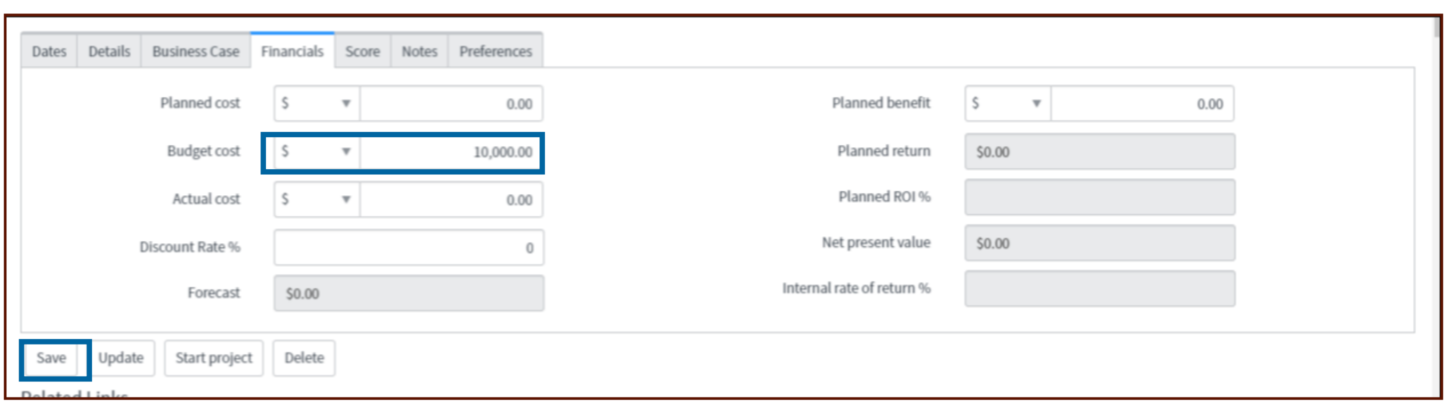


Financials tab

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**.



Cost Plans tab

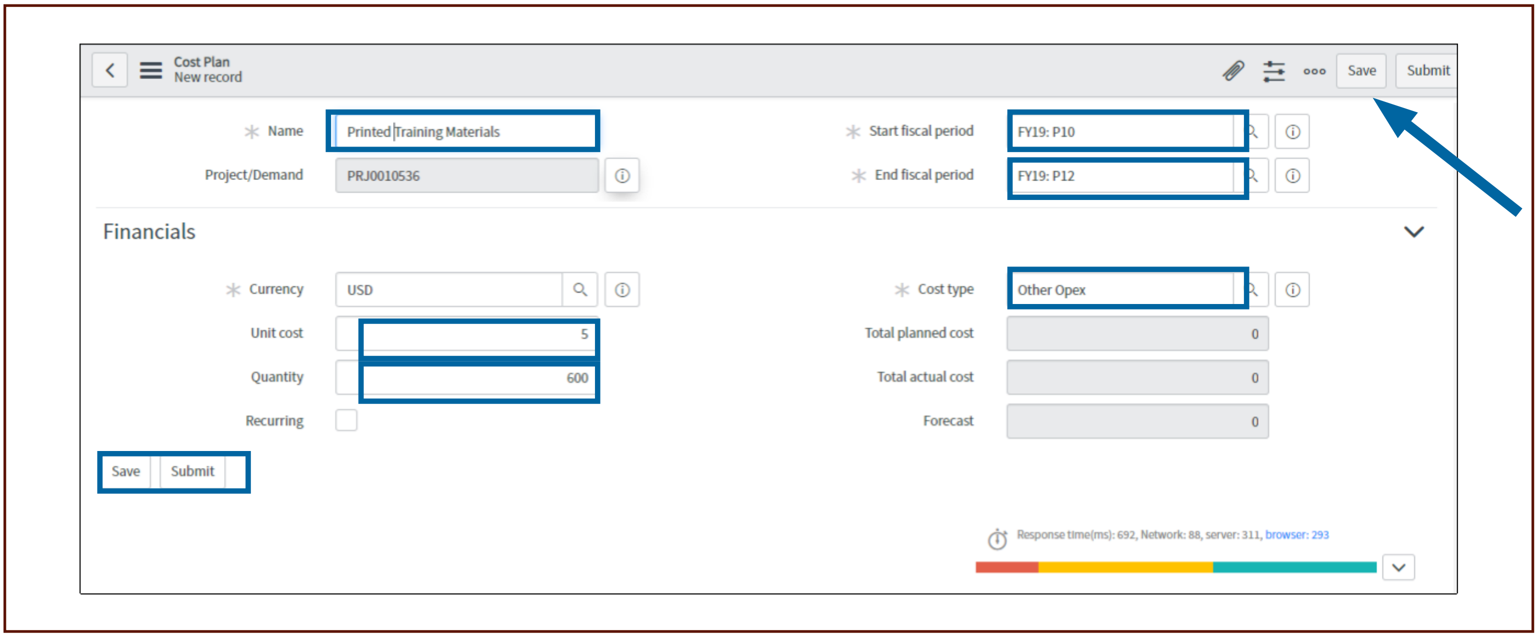
A cost plan breakdown captures the estimated cost for the project. Under the related links select the Cost Plans tab. The total cost will equal the amount put in the Budget field.

Select **New**.

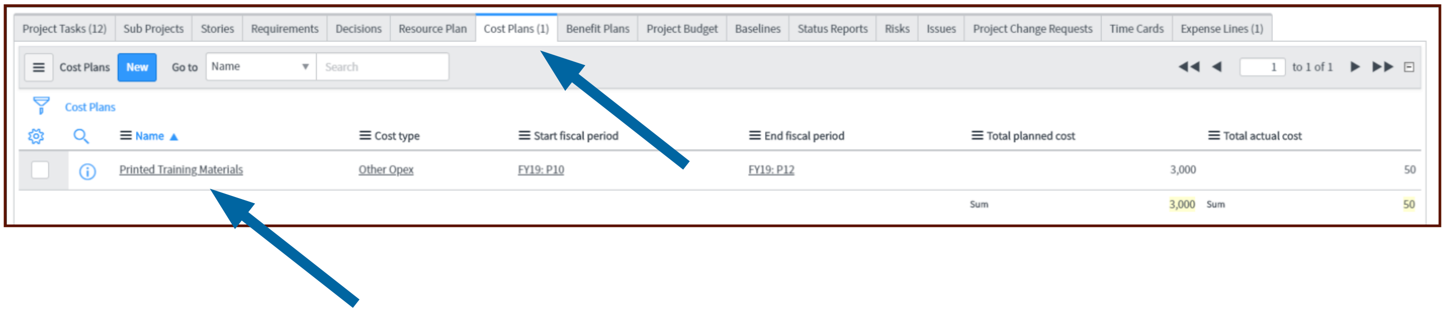
Complete the following fields:

- **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)



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



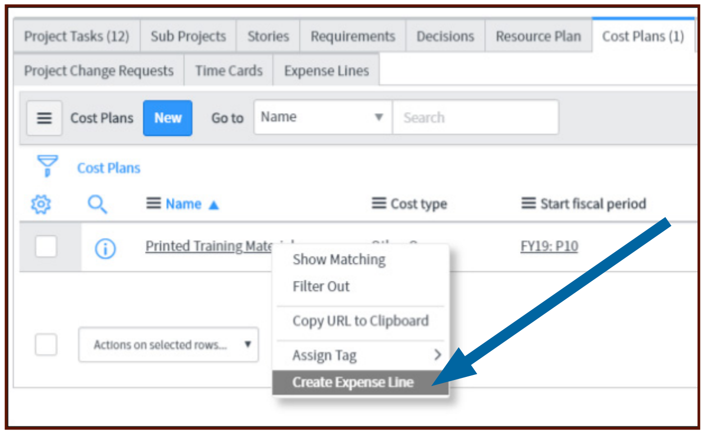
EXPENSE LINES

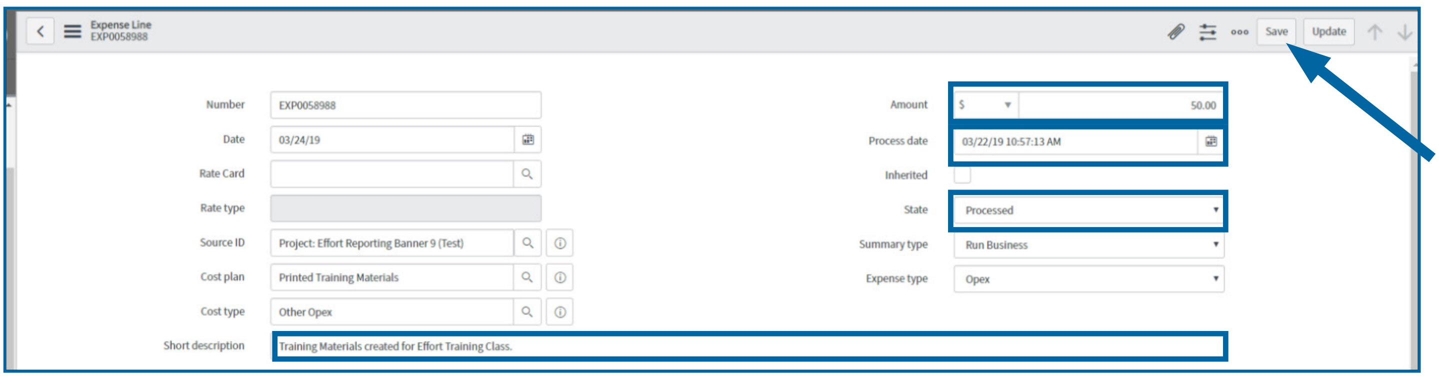
Expense Lines tab

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.

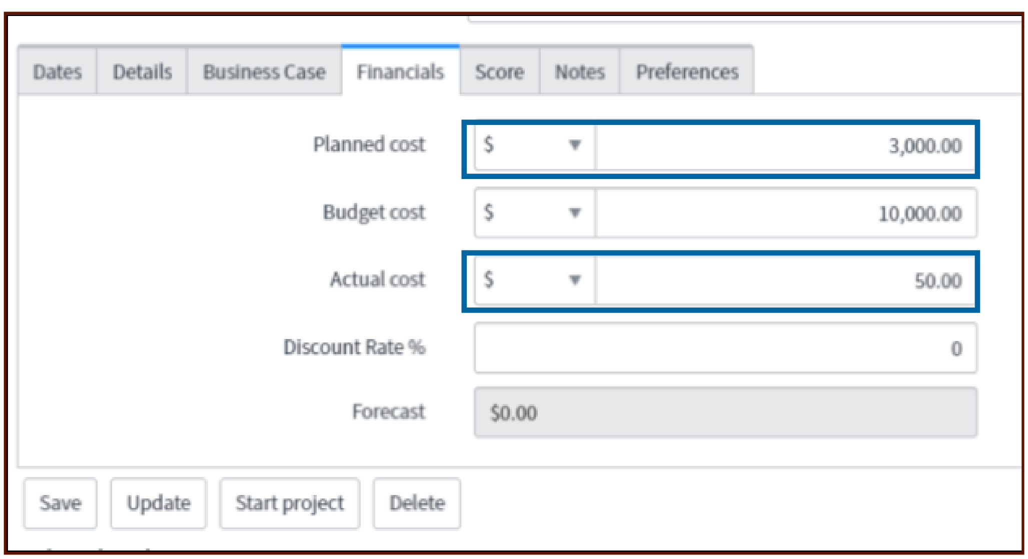
Complete the following fields:

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





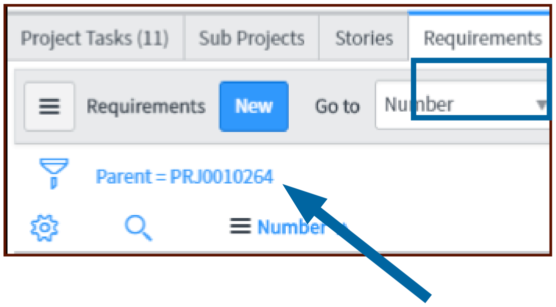
In the Financial tab, you will now see the cost plan in the Planned Cost field and once an expense has been processed, it will be listed in the Actual Cost field.



REQUIREMENTS

Requirements tab

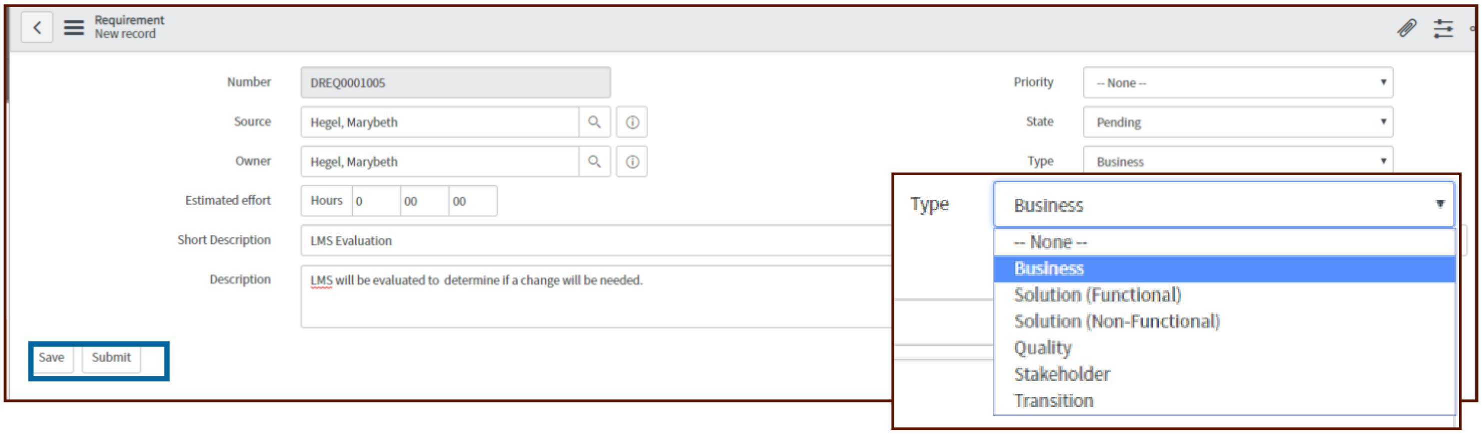
Requirements (optional) can either be high level achievements or detailed requirements. An example of a high level requirement - a working online billing system. An example of a detailed requirement - user interface that allows data entry.



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)

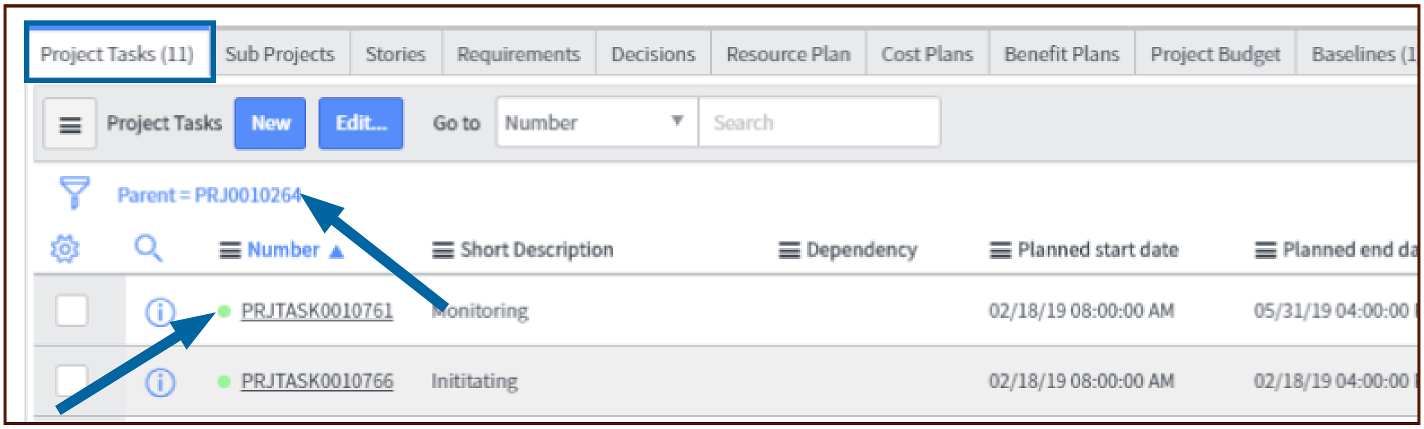
- **Business** - details the specific need that is being addressed.
- **Solution (Functional)** - describes the features of the solution.
- **Solution (Non-Functional)** - defines the attributes of the system environment; identifies standards, for example, business rules, that the system must conform 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.



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

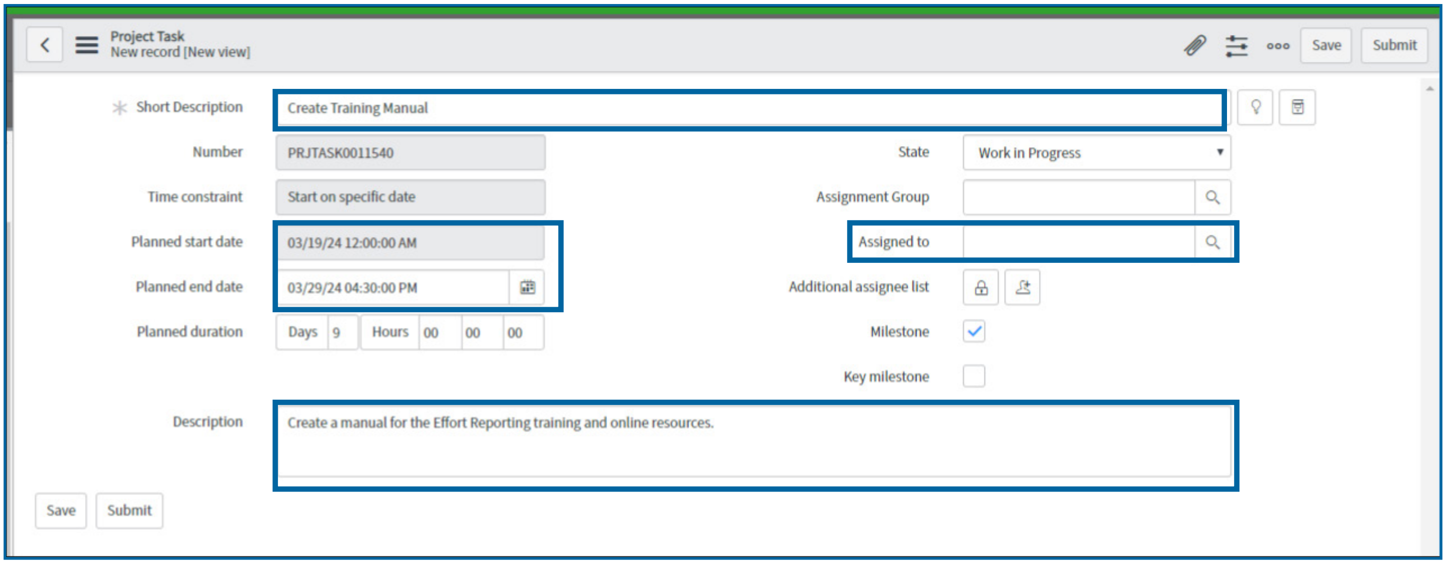
Project Tasks tab

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**.



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**.

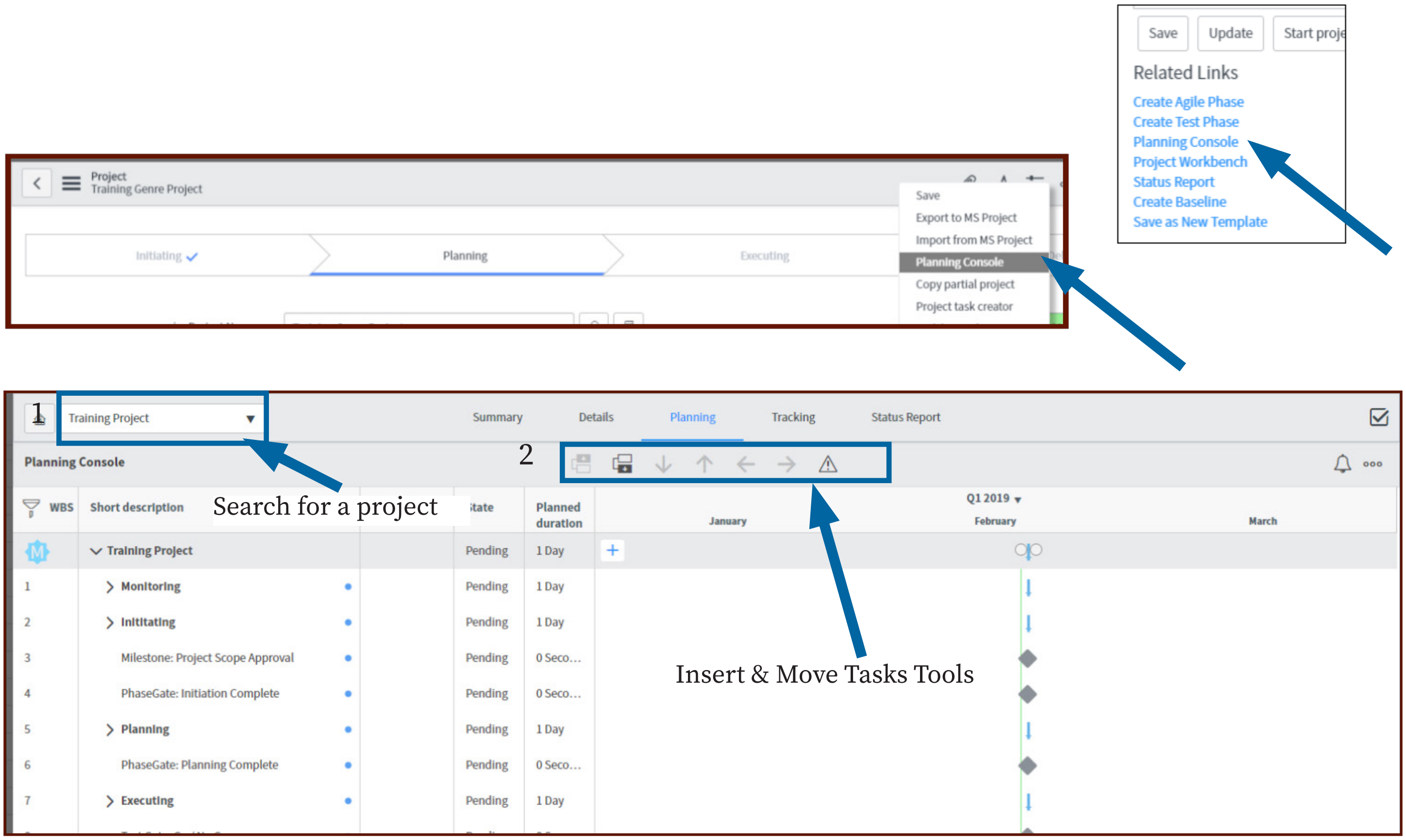
A new window will appear to create a resource plan for this task. Complete the resource plan information (see Resource Plans in this manual) or select **Submit** to return to the project.



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.

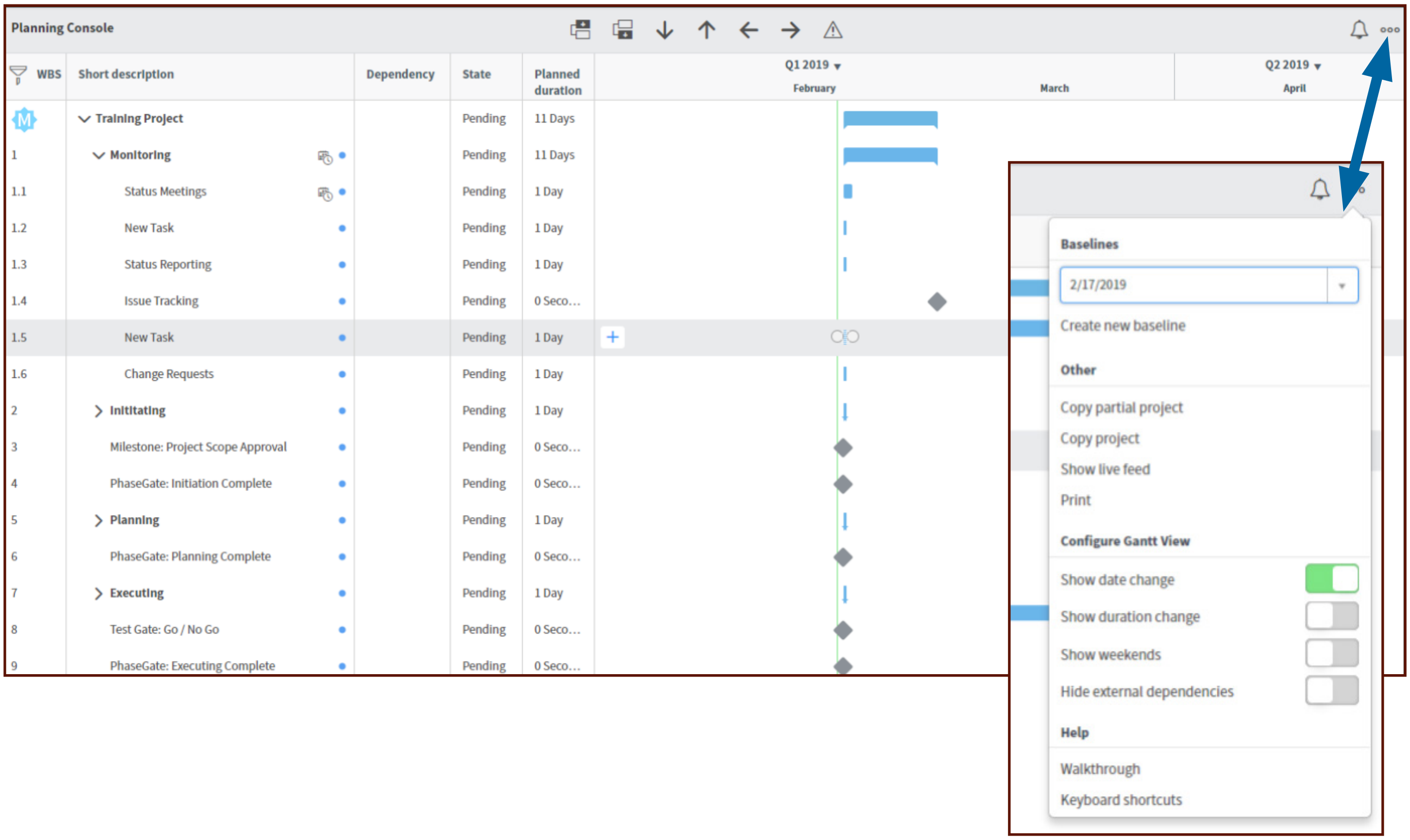
2. Insert and move tasks
- Inserts a new task above or below the selected task. You cannot insert a task above the top task
- Move the current task up or down in the hierarchy.
- Unindent or un-ident the selected task. This changes the parent and numbering of the task.
- This icon displays the critical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



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.

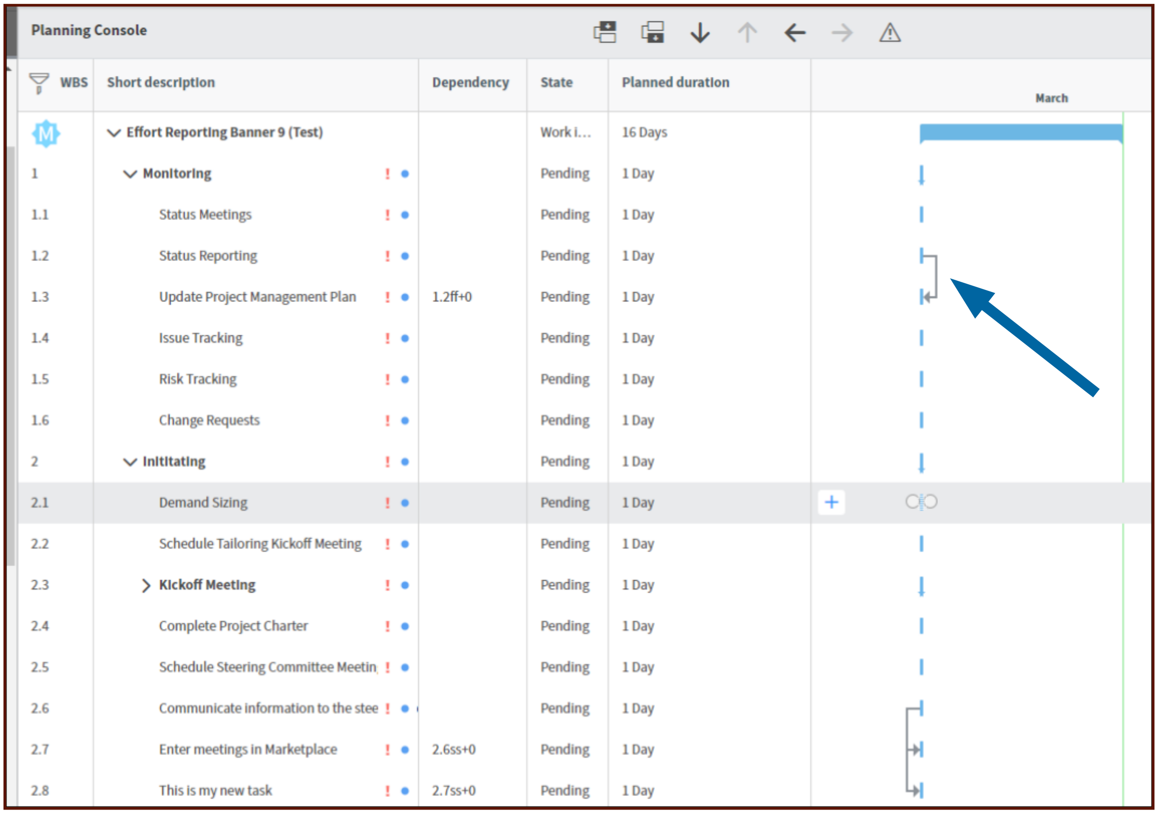
3. The **More Action** icon (...) includes a tutorial (Walkthrough), a list of keyboard shortcuts and the print function.

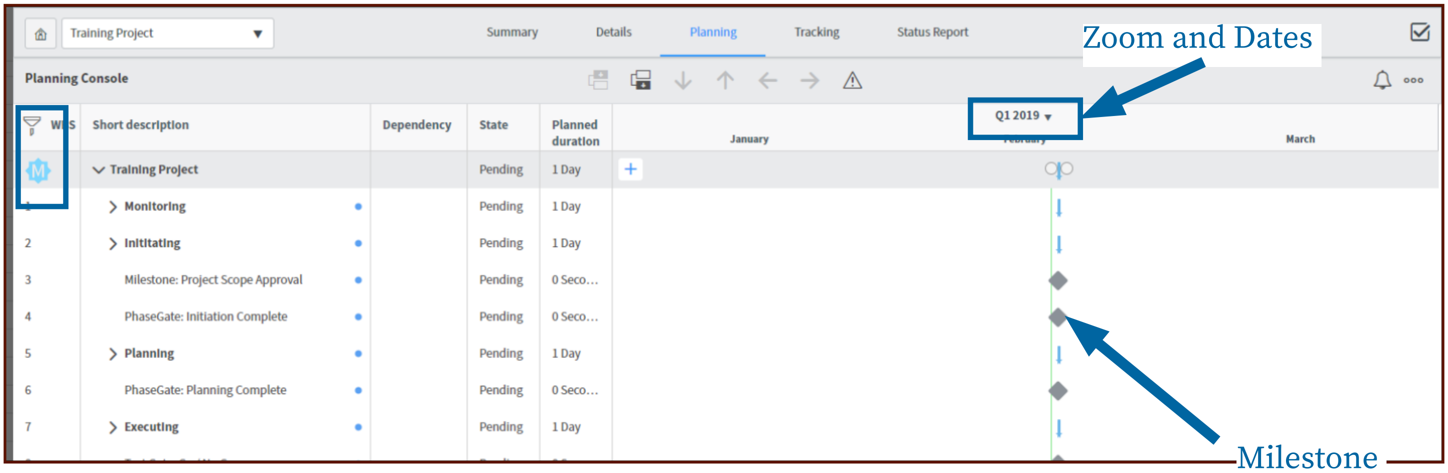
GANTT CHART

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.





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.

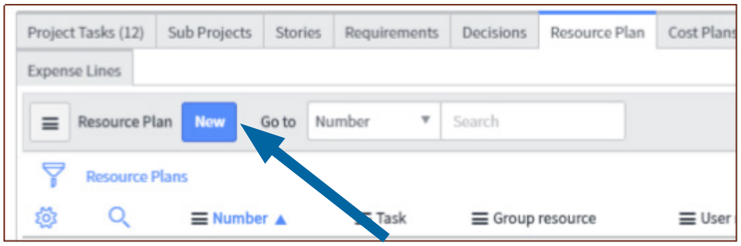
4. View more actions (**...**) to be performed on the project. You can create or view baselines, copy project, copy partial project, view live feed, print or apply template. You can change the settings to show or hide date change, duration change or weekends. You can also view Keyboard shortcuts and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

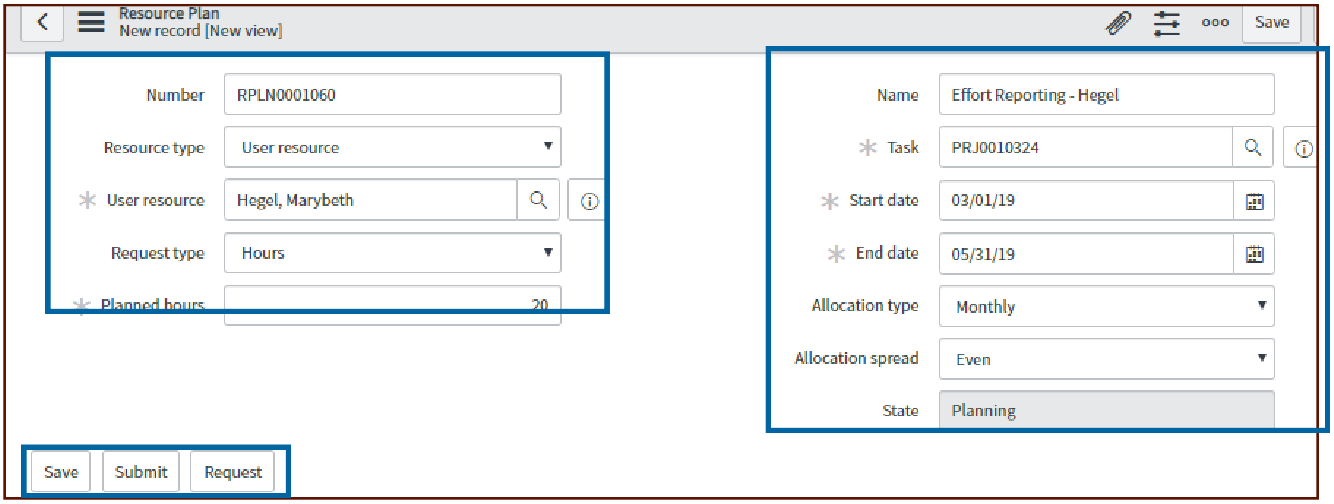
5. Change Zoom Level and scroll to date.

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.

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





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 PRJxxxxxxx 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

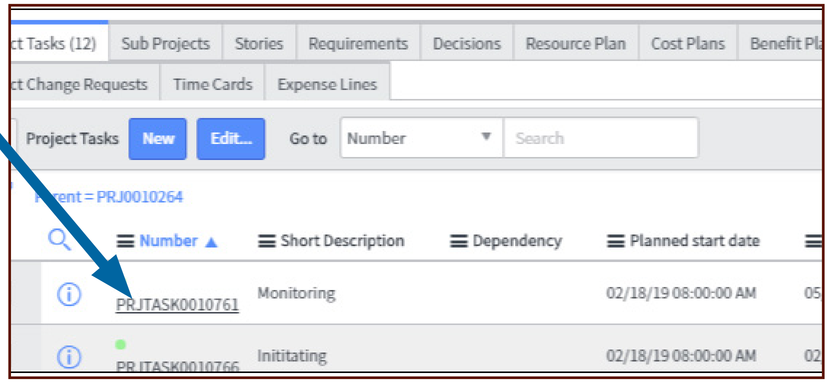
Allocation Type, Allocation spread

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.

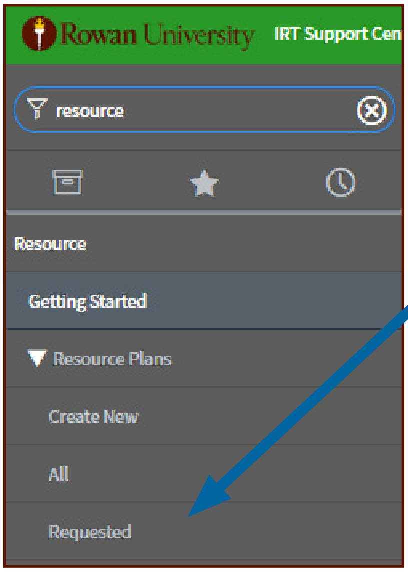


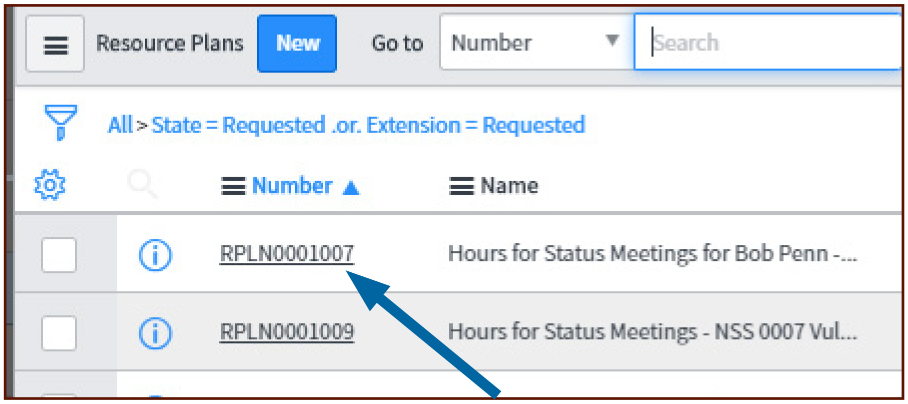
In the project task select the **Resource Plans** tab.

Select **New.**

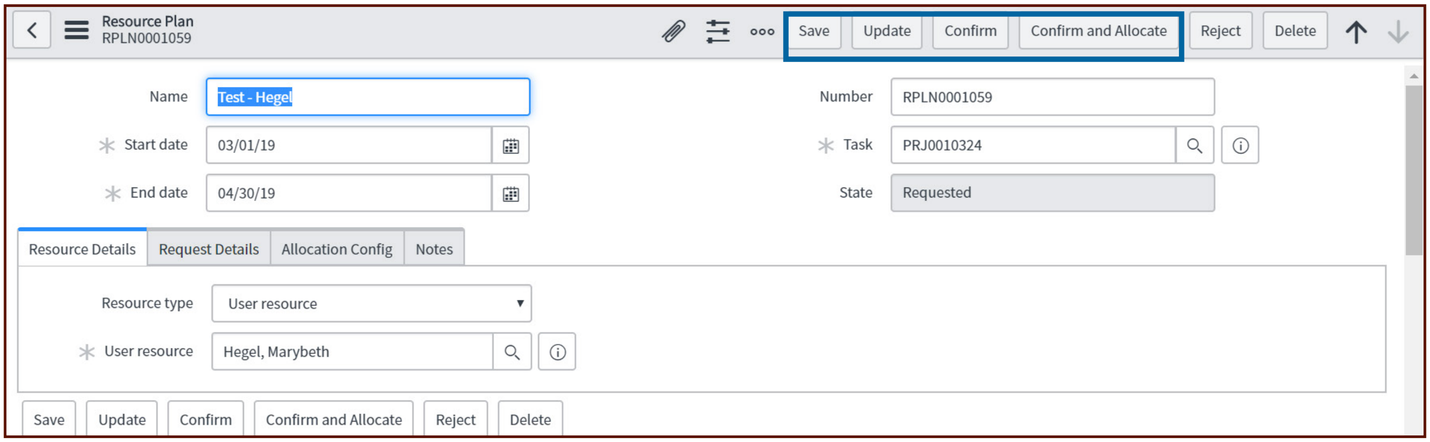
Complete the form as shown on the previous page.

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.





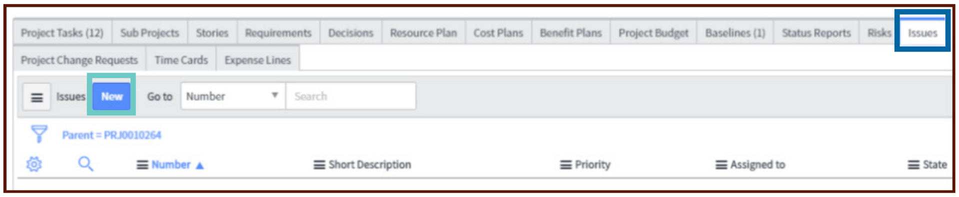
Select **Confirm and Allocate** from the top of the page. Select **Save or Update.**



ISSUES AND RISKS

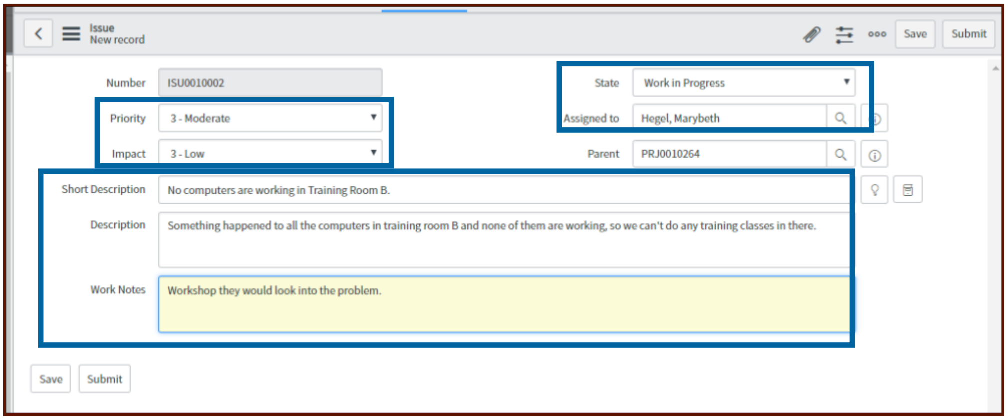
The **Issues, Risk and Change Control** tabs are for project information distribution. They are put in place during the planning phase and will be used throughout the Execution and the Monitoring/Control Phases.

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.



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**.



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.

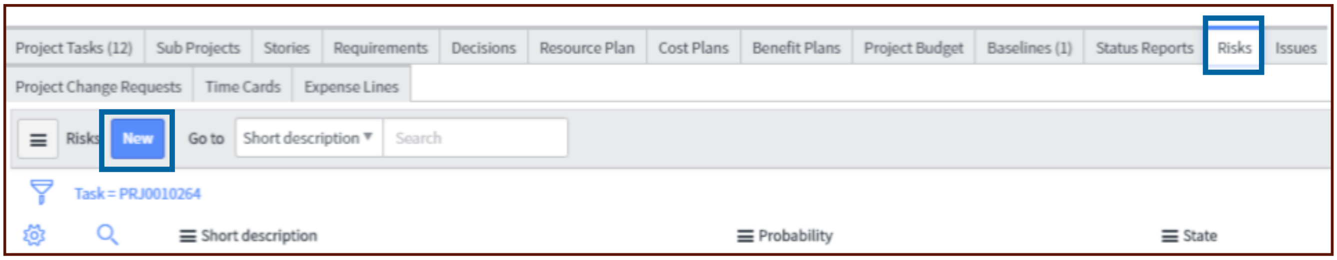
Description - A longer, more detailed description of the issue.

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

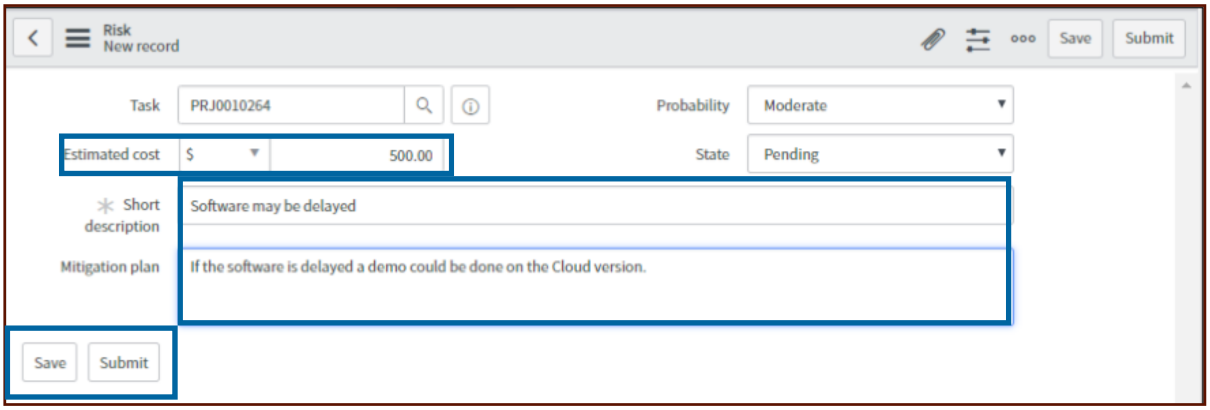
Manage your issues throughout the lifecycle of the project. As conditions change, update your issue records. Was the issue resolved? Change the state of the issue to reflect that.

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.



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



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.

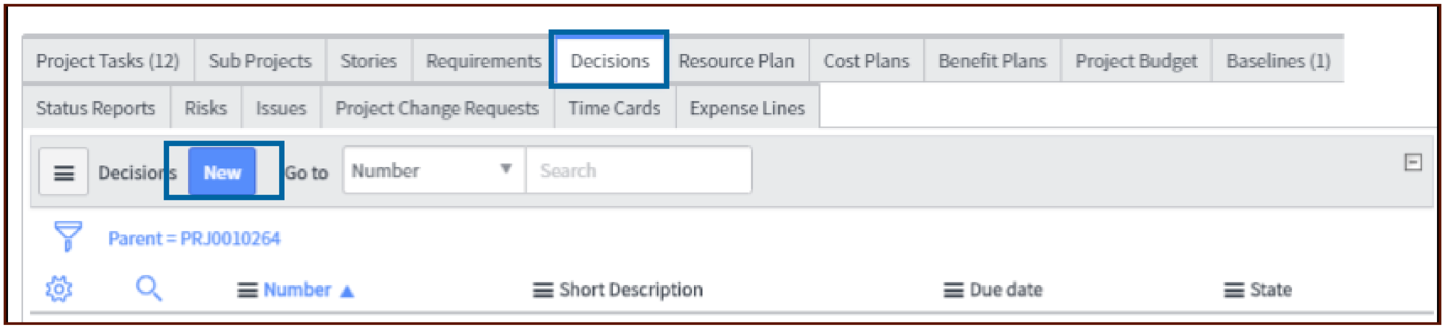
Short description - A simple description of the risk.

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

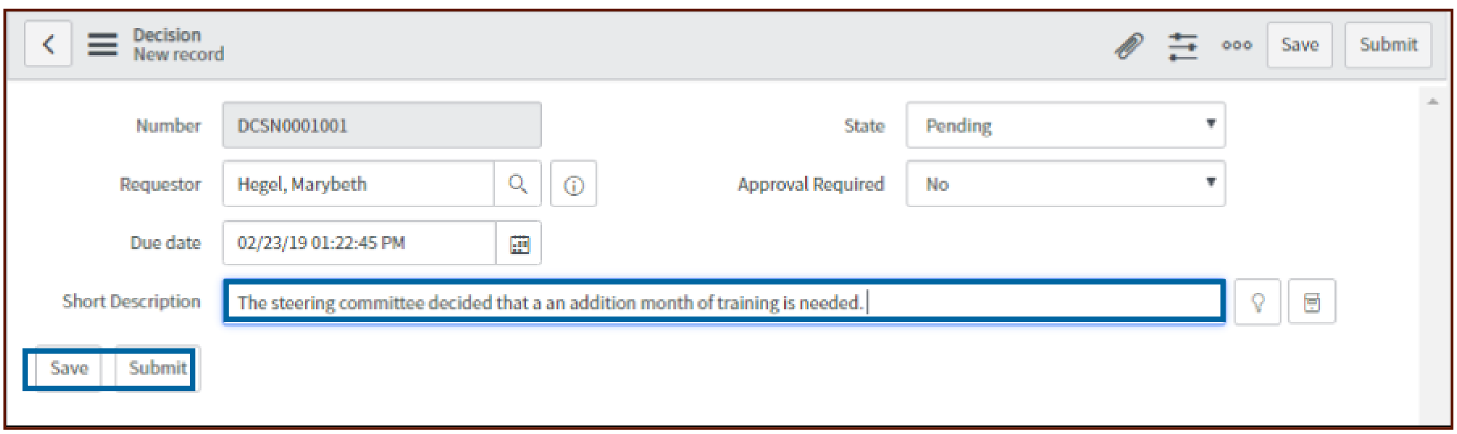
Manage your risks throughout the lifecycle of the project. As conditions change, update your risk records. Was the risk achieved or mitigated? Change the state of the risk to reflect it.

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.



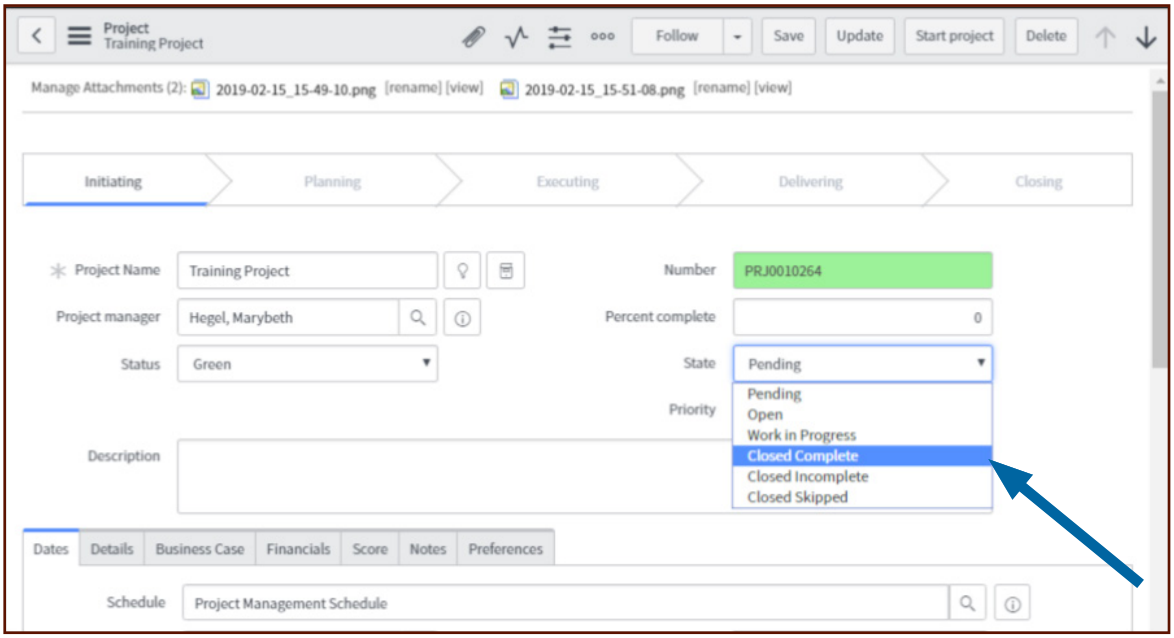
Select the Project and scroll to the second set of tabs (under Related Links). Select the **Decisions** tab. Select **New**.



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.



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

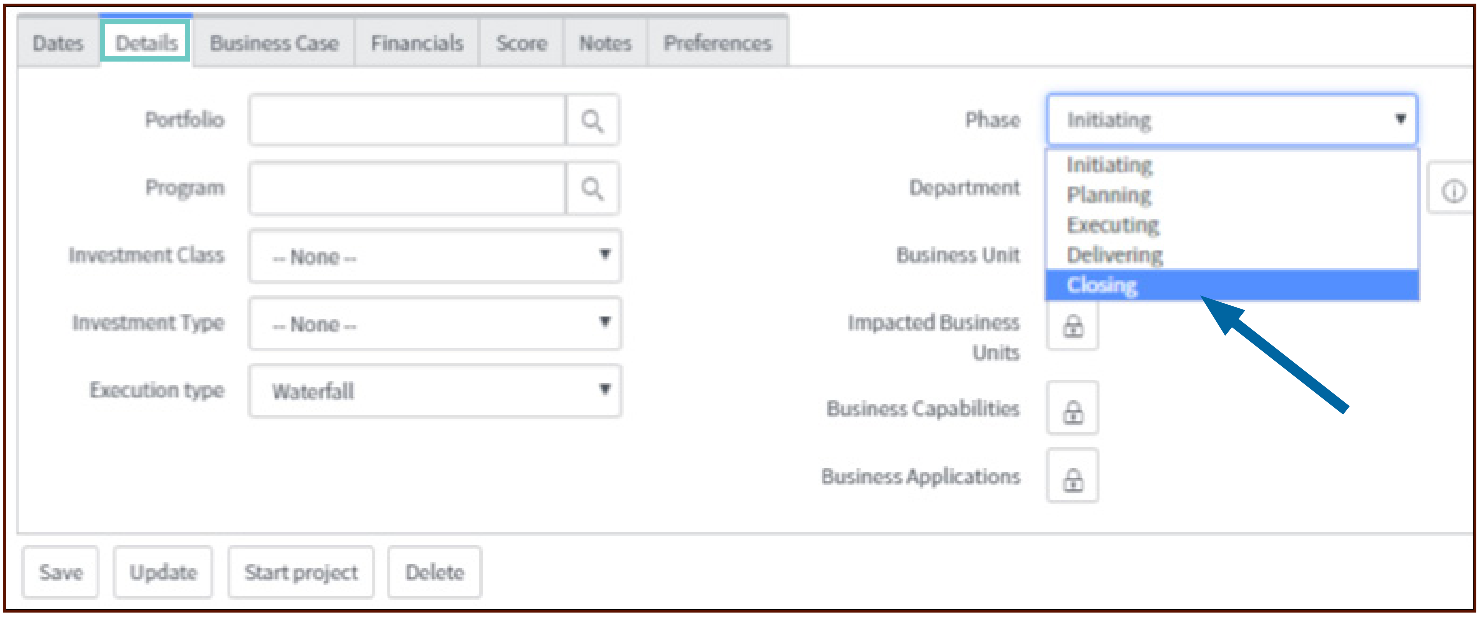
- **Closed Complete** the project is finished and all tasks are complete.
- **Closed Incomplete** the project is finished, but tasks remain unfinished.
- **Closed Skipped** the project was abandoned.

Select **Save.**

Notify the resource manager that project is closed and the resources are no longer required.

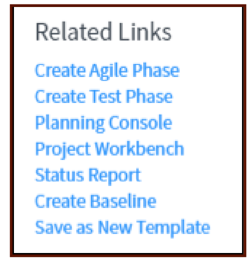
On the **Details** tab, select **Closing** from the Phase dropdown list.

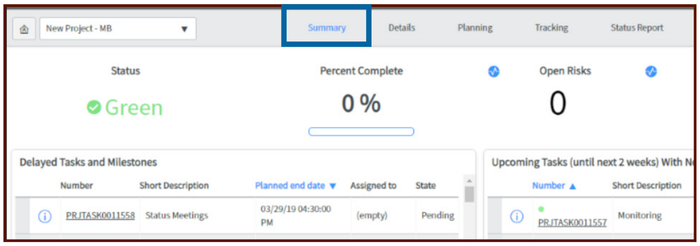
Select **Save.**



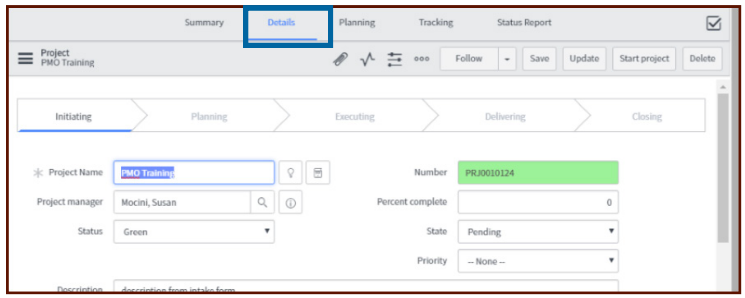
PROJECT WORKBENCH TABS

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

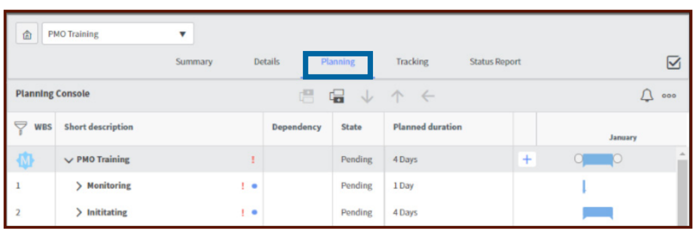




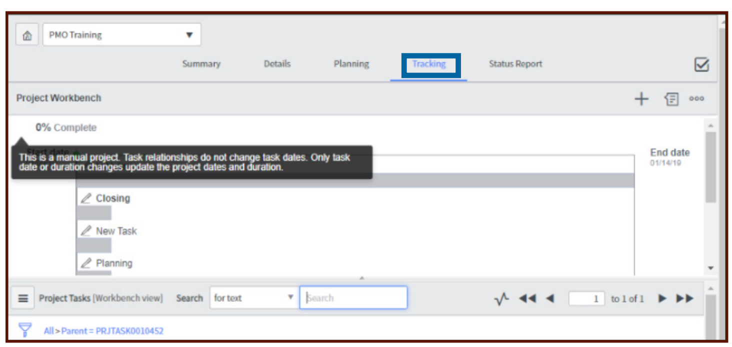
The **Summary** tab is a dashboard which displays preconfigured widgets and reports to track the progress on various aspects of a project such as open risks, actual cost, and delayed milestones.



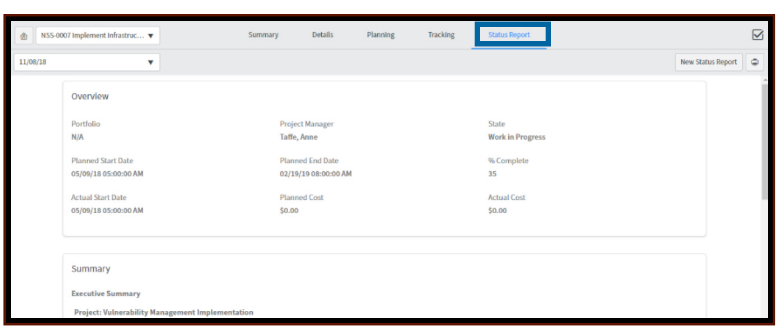
The **Details** tab opens the project form and defines important aspects of the project.



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



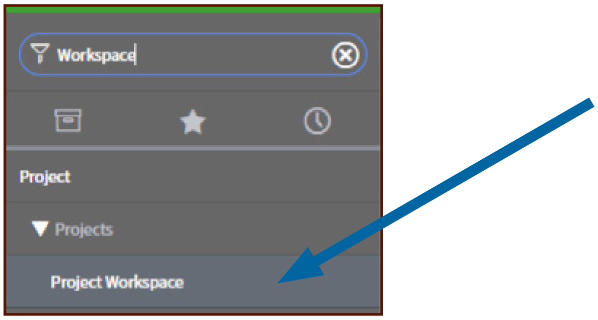
The **Tracking** tab enables you to manage the project in the project workbench.



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

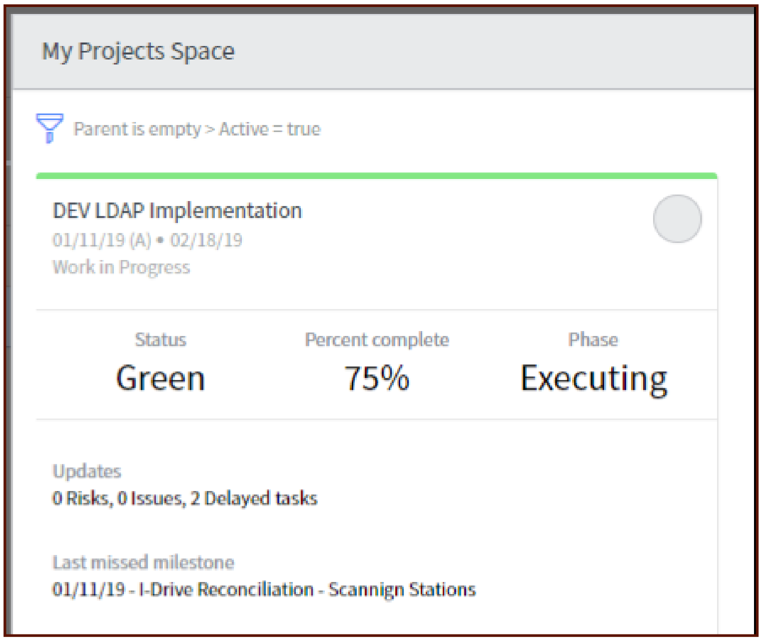
PROJECT WORKSPACE

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.



Select Project Workspace from the Application Navigator.

The project workspace overview page **My Projects Space** displays the projects as cards based on the filter criteria, which can be modified. The cards have a color band at the top. The color of the band is based on the **Status** field in the respective project record. Each card further displays the following information about the project in three rows:



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:

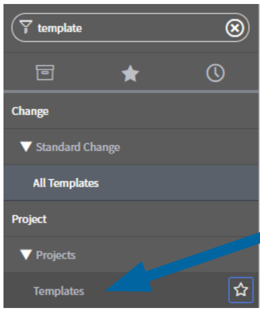
- If the project state is Pending or Open, planned start date and planned end date are displayed.
- If the project state is Work in Progress, actual start date and planned end date are displayed.
- If the project state is Closed, actual start date and actual end date are displayed.

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

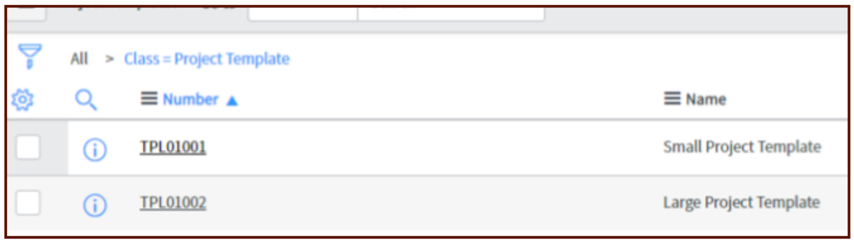
A project template defines the basic structure of a project. Project templates can include project tasks and sub-tasks, attachments, checklists, and other project information.

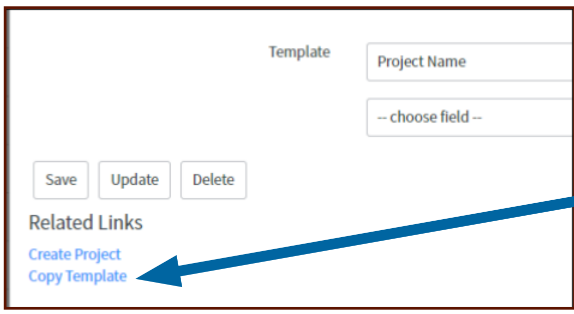


Create from an existing template.

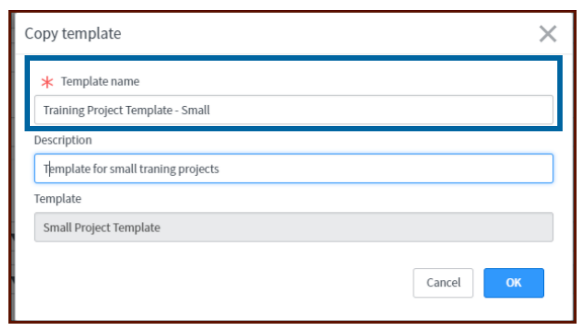
Under the **Project** module in the Application Navigator, select **Template.**

Open the desired project template.



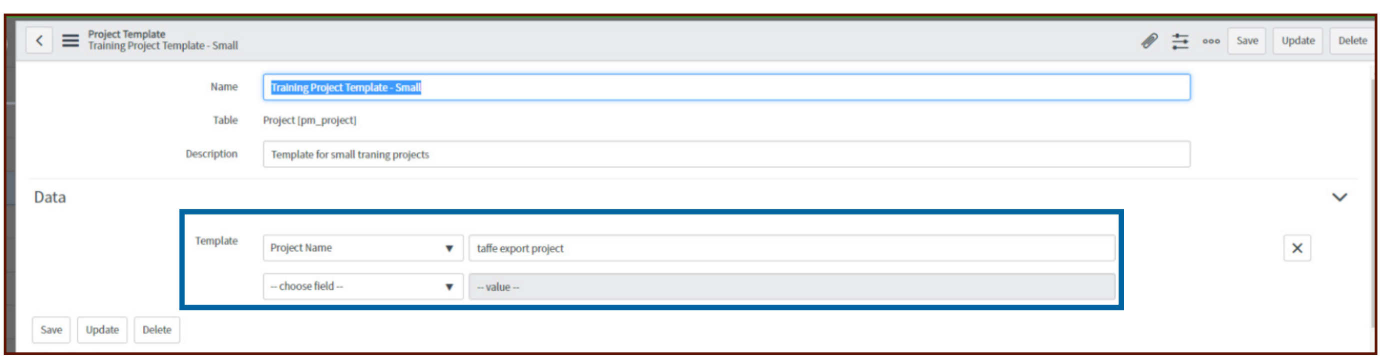


Select **Copy Template** under Related Links.



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

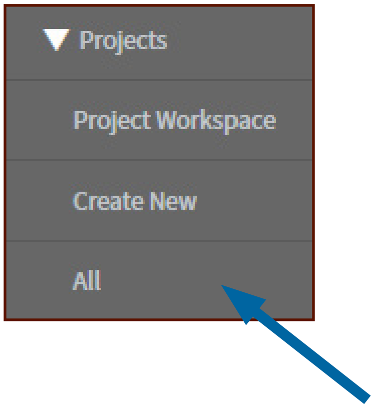
Make changes needed for new template. Add fields (select choose field dropdown) or remove fields (select the X next to the field) as needed. Select **Save** to stay on the form and continue working or **Update** to complete and leave the template.



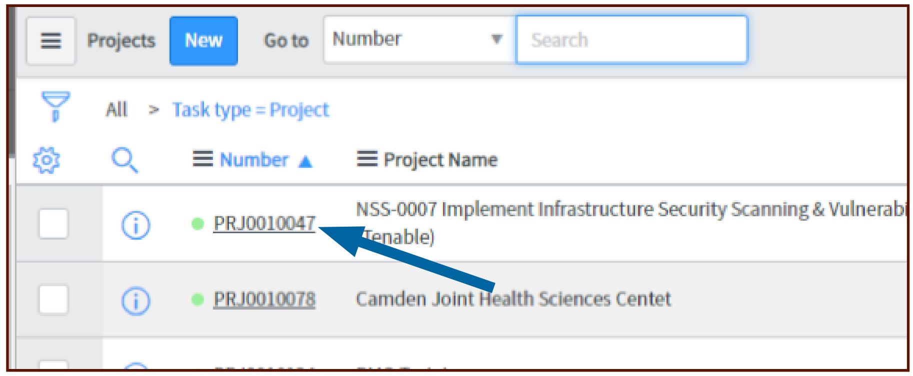
APPENDIX A CREATE TEMPLATES

Create a Template - From an Existing Project

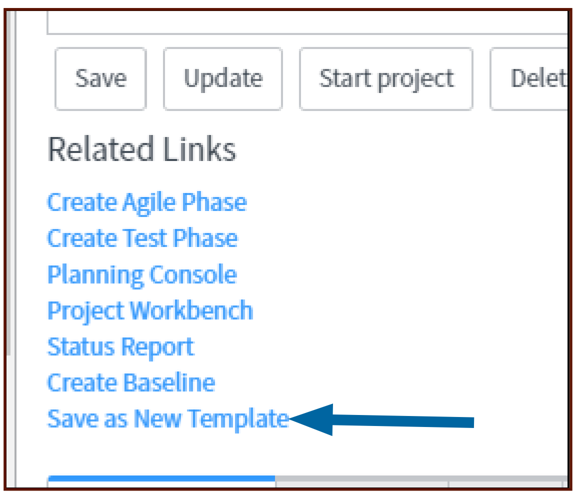
Under the Project module in the Application Navigator, select **All**.



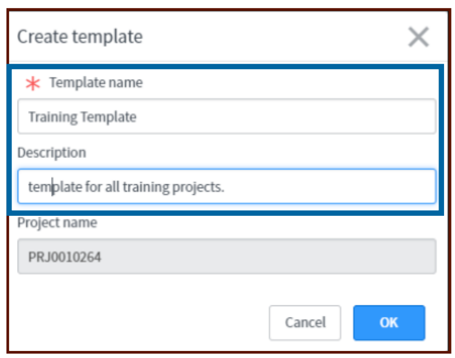
Select the number of the desired project.



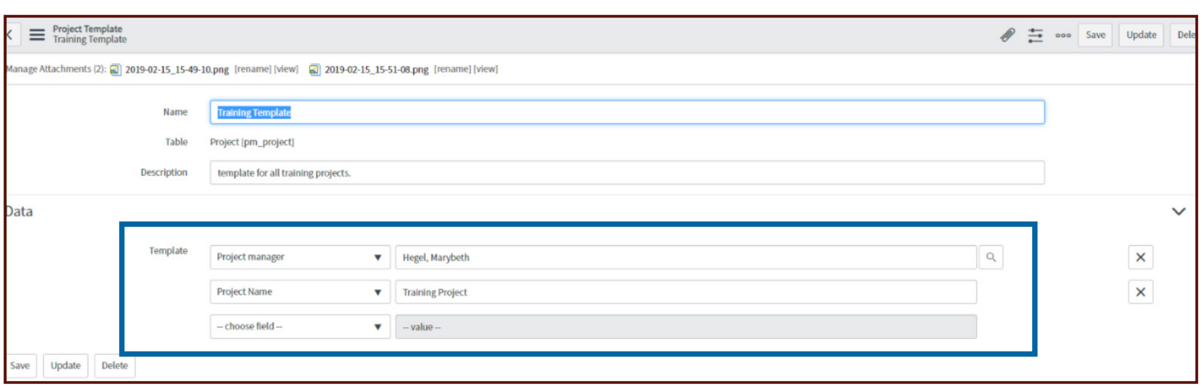
Scroll down to **Related Links** and select **Save as New Template.**



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



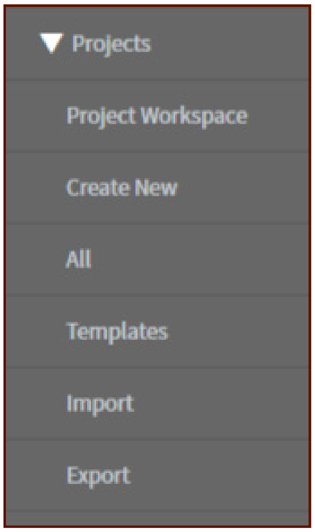
Make changes needed for new template. Add fields (select choose field dropdown) or remove fields (select the X next to the field) as needed. Select **Save** to stay on the form and continue working or **Update** to complete and leave the template.



APPENDIX A CREATE TEMPLATES

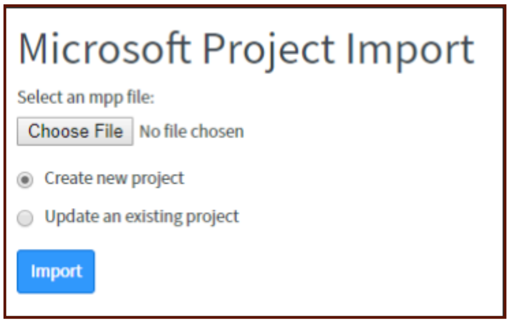
Create a template - From a Microsoft Project project.

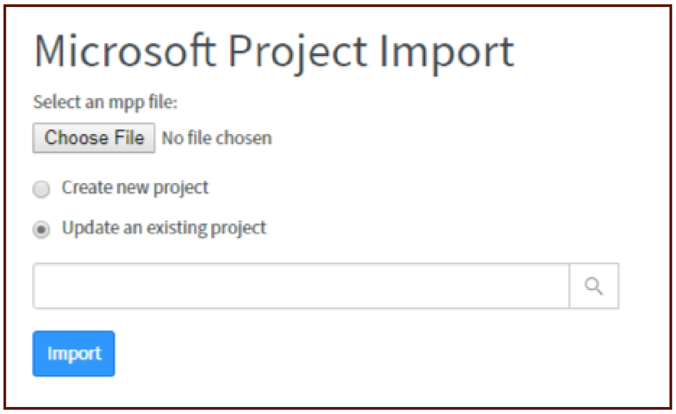
Under the Project module in the Application Navigator, select **Import.**



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 existing project**. Search for the existing project (only active projects will be on the list).

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

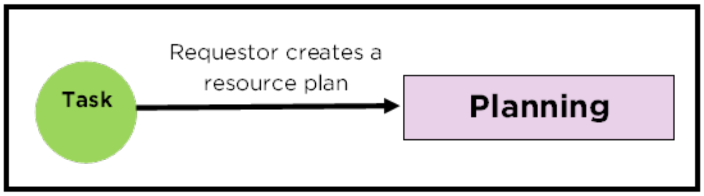
While importing a Microsoft Project file into ServiceNow, the import will fail if:

- 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.

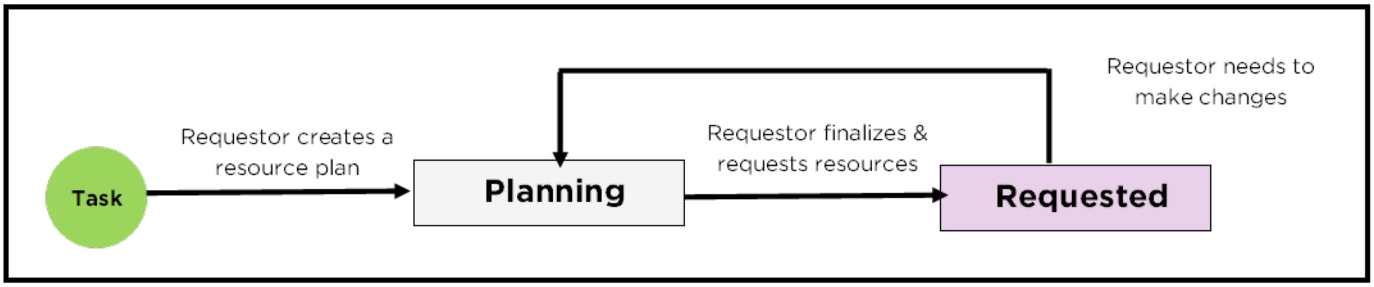
Create resource plans to ask for resources. Resource managers review, can modify and approve resource plans.
All resource plans for **that project** appear on the Resource Plan tab of the Project page.

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.

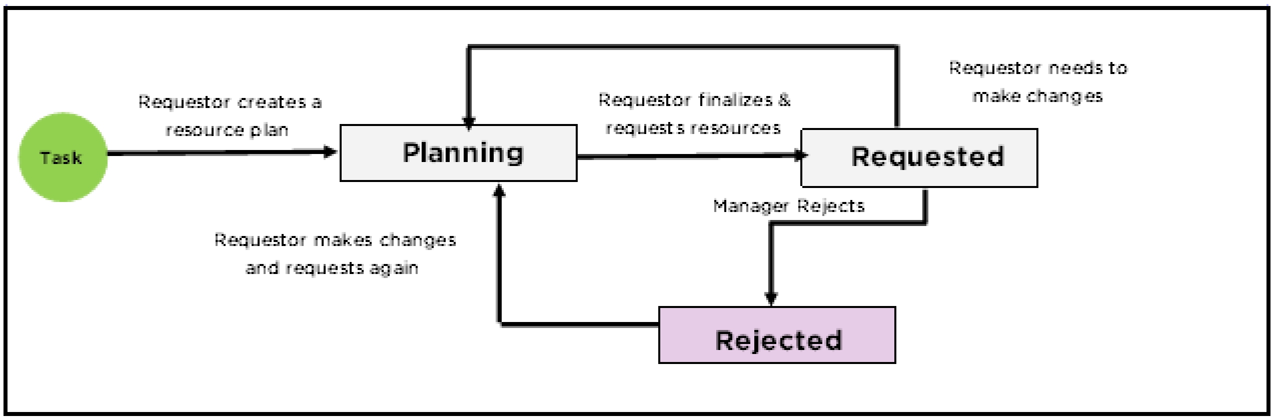


Requested - Resource requester submits a resource plan for resource managers' review by clicking **Request.** The resource plan then moves into the Requested state. Resource managers confirm and allocate resources or reject the plan. The resource requester can request a group, specific users in a group,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



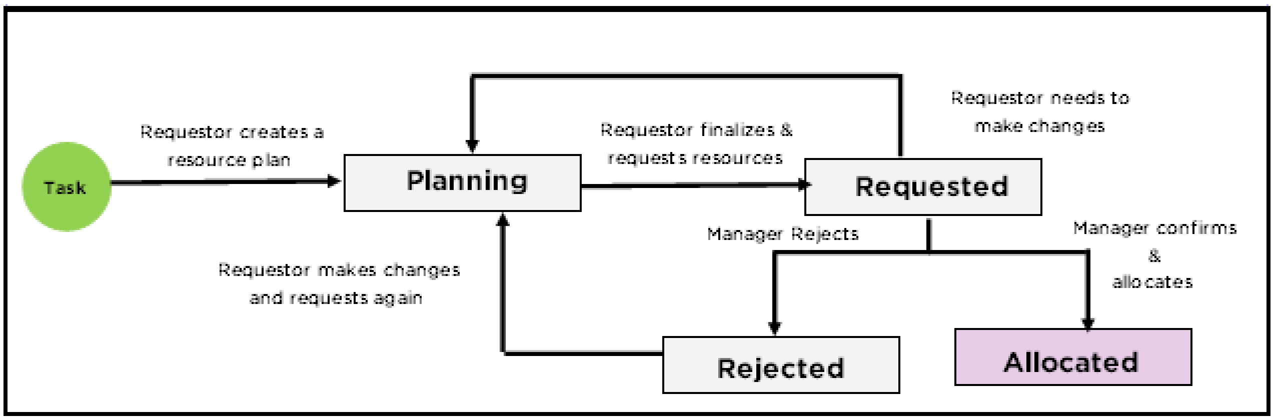
After you submit the plan for review, a resource manager can confirm and allocate the requested users. If more than one user or groups are required by the task, multiple resource plans will be needed for the given task.

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.



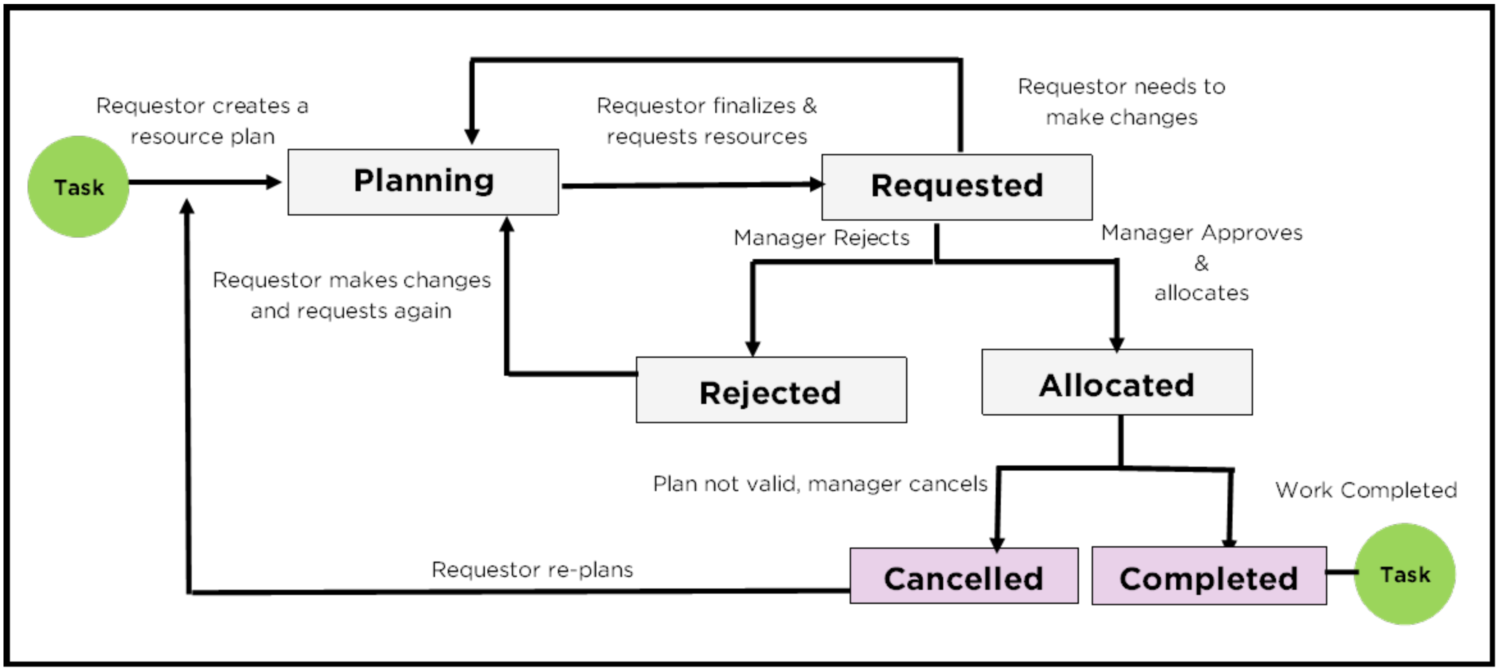
Confirmed - After the plan is requested, the resource manager can block/confirm the resources for future projects and demands. The resource plan then moves into the **Confirmed** state. Only a resource manager can modify the plans in Confirmed state. Soft allocations are created when the resource plan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

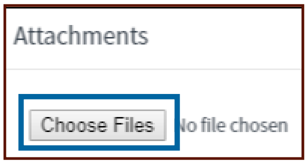


Attach a File

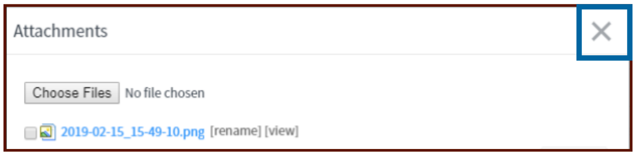
Project artifacts and documents should be attached to the project record in ServiceNow. You can upload a file as an attachment to a project. Attachment file size is not limited by default. However, uploading large attachments can cause issues with the user's active session on the instance. Empty attachments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

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

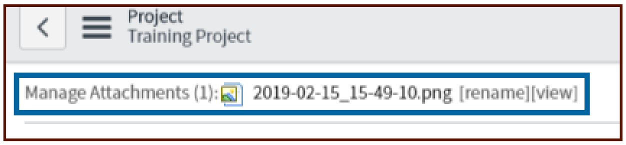
2. Select Choose **File**. Navigate and find the file on your computer. Select **Open.**



3. Close the popup window.

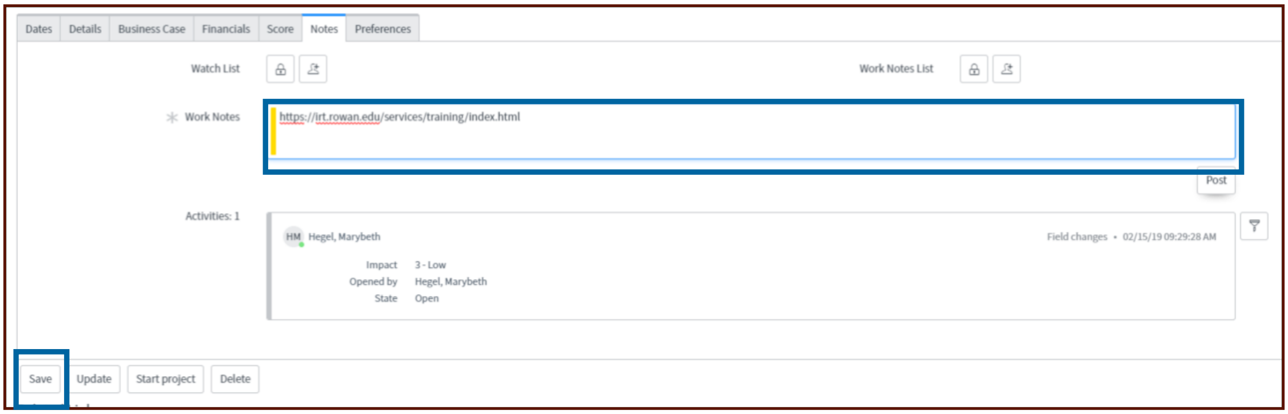


4. Files will appear at the top of the form.



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**.



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