

# Project Portfolio Management (PPM) Fundamentals

## Module 1: Project Portfolio Management Introduction

Objectives:

- Review the ServiceNow Project Portfolio Management products
- Explore the architecture and roles within Project Portfolio Management
- Discover Project Portfolio Management applications

## Module 2: Demand Management

Objectives:

- Demonstrate how to submit and screen demands
- Identify how to assess and qualify demands
- Examine Demand Workbench and Roadmap

**Labs:**

Lab 2.1: Submit a Demand

- Create a demand
- Enhance a demand
- Create a demand task
- Submit a demand
- Associate costs and resource plans with a demand

Lab 2.2: Screen a Demand

- Add demand risks
- Validate assessment recipients
- Complete demand assessments

Lab 2.3: Create a Project from a Demand

- Modify the Demand form
- Review assessment metric results
- Approve demands through creating a project
- Navigate through the Demand Workbench, Demand Roadmap, and Project CIO Roadmap

## **Module 3: Set Up a Project**

Objectives:

- Demonstrate how to initiate a project in ServiceNow
- Understand the use of project tasks
- Discover project creation features

**Labs:**

Lab 3.1: Create a New Project and Project Tasks

- Create a Project
- Modify a Project form
- Add notes and comments to a project
- Create and assign a single project task
- Create and update multiple project tasks

Lab 3.2: Project Creation Options

- Create a project from:
  - A copy of another project
  - A project template
  - A Microsoft Project import
  - Create a template from a project

## **Module 4: Planning a Project**

Objectives:

- Describe Project Workspace and Planning Console
- Discover how to manage project tasks, relationships, schedule slips, risks, issues, and costs
- Identify how to monitor and report on project status

**Labs:**

Lab 4.1: Create Project Tasks in Planning Console

- Add tasks and subtasks in the Planning Console
- Set task durations in the Planning Console
- Build out project relationships, set milestones, and establish a project baseline

## Lab 4.2: Manage Project Activities

- Monitor schedule slips
- Export a baseline
- Track risks and issues
- Create cost plans and expense lines
- Create a status report

## Module 5: Tracking a Project

### Objectives:

- Describe Project Workbench
- Examine waterfall, Agile, and hybrid projects
- Identify how to manage project phases, tasks, and stories

### Labs:

#### Lab 5.1: Define a Waterfall Project

- Create a waterfall project
- Add phases and project tasks in the Project Workbench and the Project form

#### Lab 5.2: Define an Agile Project

- Review Agile groups and add team members
- Create an Agile phase
- Associate existing and new stories to an Agile phase

#### Lab 5.3: Manage a Hybrid Project

- Manage a hybrid project
- Create and manage a test phase
- Create a milestone and manage project tasks and stories

## Module 6: Resource Management

### Objectives:

- Discover how to create and manage resource plans
- Recognize key components of the resource workbench
- Examine resource costs and timecards

## **Labs:**

Lab 6.1: Request Resources ▪ Create a new resource plan based on resource availability

- Manage and request a resource plan

Lab 6.2: Confirm and Allocate Resources

- Create soft allocations
- Create hard allocations

Lab 6.3: Submit a Time Card

- Submit actual time against a resource plan and project
- Approve a time card

## **Module 7: Program and Portfolio Management**

Objectives:

- Recognize key components of building programs and portfolios
- Discover the Program Workbench
- Demonstrate how to plan a portfolio

## **Labs:**

Lab 7.1: Create and Manage a Program

- Define a program
- Relate program assets
- Use the Program Workbench

Lab 7.2: Plan and Manage a Portfolio

- Add demands and projects to a program/portfolio
- Create planning scenarios
- Compare scenarios to determine which is most beneficial
- Confirm a scenario
- Track a portfolio

