

SPM Release Enablement

Formerly known as release delta training

2026 July to September Store release

Strategic Portfolio Management (SPM) Value Evolution

55+

Major
Innovations

6

Family
Releases

12

Store
Releases

2024 Q1 & Q2

Washington D.C

- Now Assist for SPM: Feedback Summarization & Demand Creation
- Enterprise Agile Planning
- Actionable Resource Management Workspace
- Resource Boards: Export to Excel/CSV
- Associate Work to Targets - SPW
- Next Experience Dashboards (Project Workspace & SPW)
- Projects Source to Pay Ops Better Together Story
- Migration to Attribute-Based Resource Plans
- Business Capability Lens - EA + SPM Better Together
- Launch of CWM

2024 Q3 & Q4

Xanadu

- Now Assist for SPM: Email Project Summary Full-Doc Summarization and Multi-Feedback Summarization
- Project Status Reports in Docs
- Goal Framework: Target Check-ins and Progress Visualization
- Scenario Planning: Trade-off Analysis, Compare Scenarios & Approve Scenarios
- Export Roadmap to PowerPoint
- RMW & PWS: View Actuals vs Planned Resource Assignments
- Docs in PWS, EAP, Strategic Planning
- Migration Path for SAFe to EAP

2025 Q1 & Q2

Yokohama

- **Now Assist for SPM:** Writing Planning Item, Enhanced Story Generation
- Scenario Planning for Financials
- Dashboards in RMW and SPW
- RMW - Extend Resource Request & Edit Groups
- PW - Copy/Duplicate Status Reports
- EAP - Integration with Jira & ADO workaround, Kanban Configurations
- CWM Updates
- Now Assist for SPM powered by AI
- Agents: Monitor Project Tasks
- Now Assist for SPM: Story Generation in EAP
- Portfolio Financials
- Benefits planning in SPW
- Digital Product Lens
- SPM + Impact Better Together
- SPM + Opportunity Market Place Better Together
- SPM Docs - Real time collaboration
- Project Workspace - Checklists (project & task level), Read-Only View for Project Status Reports
- Resource Management: Enhanced allocation modal based on resource utilization and Group by with allocation roll-up
- CWM Updates: Impact + CWM

2025 Q3 & Q4

Zurich

- Now Assist in SPM:
 - Identify Similar Records for Demands
 - Acceptance Criteria Generation
 - Target Generation
- Playbooks in Project Workspace
- EAP & Jira integration
- Multi-currency in New Financials
- EAP & CWM Connection
- Demand Conversion to EAP entities
- SPW - Configurable Roadmaps, Sharing Portfolio, VoC enhancements
- Status Reports - States & Copy Reports
- Benefit Planning
- Labor Cost Plans in sub-projects & planning items
- RMW - Assigning resources in unassigned resources, realignment resource option, data grid filtering, work notes and resource rate editable
- AI Strategy in AI Control Tower
- Agile Sprint Planning in CWM
- Connected Work in CWM
- Financials on Planning Items
- New display modes in Financials
- UX Enhancements on Roadmap in SPW
- Create resource board in RMW & PW
- Move Resource Capability in RMW & PW
- Add Hover States for Resource Modifications in PW & RMW
- Rate model support for planning items in RMW
- Third Party LLM Model connections
- Improved Project Email Insight Now Assist Skill

2026 Q1 & Q2

Australia

- Demand manager AI specialist
- Portfolio Insights
- Project Risk Detection
- Epic health status
- Enhanced Goal Insights
- Enhanced Project Insights
- Enhanced Project Status Reports
- Enhanced Demand Summarization Skill
- AI Project Status Reports
- Goal Level Insights
- Demand AI Summary
- In-App Project Insights + Enhanced Email
- Quick Story Generation from Epics
- Enterprise Strategy & Goals V1.0
- Demands New UX V1.0 with Playbooks
- Better Together with ITAM
- SPW Hierarchy & Kanban Views
- Goals - Delegate KR's & Targets
- EAP Usability + Hierarchy View
- Multi-Currency Baselines
- Resource Management Enhancements

2026 Q3

Brazil

July 2026

- Portfolio AI Insights Expansion
- AI Project Plan Generation
- Project Q&A Enhancements
- Automatic Goal Status Calculation

August 2026

- Demands Dashboards
- RIDAC Governance Across SPW
- AI Identified Risks Enhancements
- Conversational Demand Creation
- Executive Tab with Demand Summary
- Similar Demands Detection
- Demand Workspace Financial Grid
- Hybrid Project Management

September 2026

- SPM MCP Server General Availability
- EWD - Hardened Security Plugin and Tailored Layouts by Partition
- Programs in L1 Portfolio Plans
- RIDAC

SPM Overview of Major New Features and Enhancements

Description | Business problems it solves

New Feature/ Enhancement	What's changed	Business Outcomes
<u>MCP for SPM</u>	Strategic planning moves to where your teams already work. Live data in AI clients. No more manual dashboards. Decisions happen faster because context switching stops.	Portfolio managers make faster risk calls. Project teams spend less time on status reports, more on delivery. Leadership gets real-time insights instead of day-old spreadsheets.
<u>Dashboards in Demands</u> Strategic Planning Workspace Portfolio Planning Workspace	New dashboard view with demand analytics, data quality metrics, and a customizable bubble chart	Replace static workbench views with a living, editable picture of your demand portfolio
<u>Hybrid Project Management</u> Project Workspace Collaborative Work Mgmt	Project managers plan and govern in Project Workspace while team members view, update, and break down their assigned work in CWM — with both sides staying automatically synchronized in real time.	Project managers maintain full plan visibility without chasing status updates, and team members work in their preferred environment without needing access to Project Workspace.

SPM Overview of **Minor** New Features and Enhancements

Description | Business problems it solves

New Feature/ Enhancement	What's changed	Business Outcomes
<u>AI Demand Summarization</u> Strategic Planning Workspace Portfolio Planning Workspace	Cleaner AI Overview tab in the new workspace; also available in classic UI	Faster context on any demand without reading through the full record
<u>Identify Similar Demands</u> Strategic Planning Workspace Portfolio Planning Workspace	AI flags contextually similar demands (85% threshold) surfaced as a banner and related list on the demand record	Catch duplicate or overlapping demands before they progress through the review cycle
<u>Customizable Summarization in Demands</u> Strategic Planning Workspace Portfolio Planning Workspace	Admins can edit which fields feed the summary and clone/modify the prompt	AI output reflects your organization's priorities, not a fixed template

SPM Overview of **Minor** New Features and Enhancements

Description | Business problems it solves

New Feature/ Enhancement	What's changed	Business Outcomes
<u>Financial Grid in Demands</u> Strategic Planning Workspace Portfolio Planning Workspace	Now available inside Demand Workspace, consistent with Project Workspace	Manage demand financials without switching contexts or tools
<u>My Demands Widget</u> Strategic Planning Workspace Portfolio Planning Workspace	Requesters can add a demand tracker directly to their employee portal canvas	Full visibility into submitted demands without needing to contact the demand team
<u>Conversational Demand Creation</u> Strategic Planning Workspace Portfolio Planning Workspace	Natural language demand creation via Moveworks; auto-populates form fields and surfaces related catalog items	Reduces incomplete or duplicate submissions before they reach the demand manager

SPM Overview of **Minor** New Features and Enhancements

Description | Business problems it solves

New Feature/ Enhancement	What's changed	Business Outcomes
<u>Automatic Target Status Calculation</u> Strategic Planning Workspace	Target status is now automatically calculated when actuals are entered, eliminating manual status selection and ensuring every check-in period has a consistent, populated status.	Improved data quality and governance across goal reporting, giving leaders a reliable, real-time view of target health without manual intervention.
<u>Project Plan Generation — Performance & Accuracy</u> Project Workspace	AI model tuning and prompt refinement deliver more accurate project plans from uploaded documents, reducing the gap between what's in your files and what gets generated.	Project managers spend less time correcting AI-generated plans and more time executing them.
<u>Milestone Extraction</u> Project Workspace	Milestones referenced in uploaded documents are now automatically identified and pulled into the generated project plan — no manual re-entry required.	Key delivery markers from existing documentation are preserved in the project plan without additional effort from the project manager.

SPM Overview of **Minor** New Features and Enhancements

Description | Business problems it solves

New Feature/ Enhancement	What's changed	Business Outcomes
<u>Plan Review Stage</u> Project Workspace	A review step is added before project creation, letting users inspect how uploaded content maps to the plan structure and adjust before committing.	Project managers catch mapping gaps and scope issues before the project is created, reducing rework after generation.
<u>Dynamic Content in Docs</u> Project Workspace	Live project data, fields, and tables can now be pulled directly into project docs using a backslash trigger — extending what was already available in status reports.	Project documentation stays current with the plan automatically, removing the manual effort of keeping docs and project data in sync.
<u>Edit Projects in List View</u> Project Workspace	Projects can now be edited inline directly from the list view, without navigating to the details page for each record.	Project managers make routine updates faster and stay oriented within the full portfolio view rather than losing context navigating away.

SPM Overview of **Minor** New Features and Enhancements

Description | Business problems it solves

New Feature/ Enhancement	What's changed	Business Outcomes
<u>Portfolio AI Insights - Projects at Risk</u> Project Workspace	AI now surfaces projects with underlying issues — delayed tasks, resource bottlenecks, financial pressure — before those issues cause visible schedule delays.	Portfolio managers can intervene earlier, with root cause context and recommended actions, before risks escalate into delays.
<u>Portfolio AI Insights - Items Forecasting Over Budget</u> Project Workspace	AI identifies planning items where forecast is exceeding approved budget and surfaces root causes across labor, rates, and non-labor cost plans.	Portfolio managers pinpoint cost overrun drivers earlier, reducing the time spent manually reviewing cost plans across the portfolio.
<u>Portfolio AI Insights - Enhanced AI Insights Panel</u> Project Workspace	The insights panel is now expandable to a full view, regenerable on demand, and includes a per-insight info icon explaining the underlying methodology.	Portfolio managers access deeper insight detail and understand exactly what data is being analyzed, improving confidence in AI-surfaced recommendations.

SPM Overview of **Minor** New Features and Enhancements

Description | Business problems it solves

New Feature/ Enhancement	What's changed	Business Outcomes
<u>RIDAC by Type</u> Project Workspace	RIDAC navigation is reorganized into separate tabs per type — risks, issues, decisions, actions, change requests — with inline editing and multi-row actions replacing the grid layout.	Project managers find and update RIDAC items faster, with fewer clicks and without opening individual records for routine changes.
<u>RIDAC as Related Lists</u> Project Workspace	RIDAC is now available as a related list on demands, epics, features, and iterations — extending visibility beyond projects to the full delivery hierarchy.	Teams managing agile and hybrid delivery track risks and issues directly on the records where work is happening, without switching contexts.
<u>Admin Access Control for Partition Data</u> Enterprise Wide Deployments (EWD)	System administrator access to partition data is now off by default — explicit partition role assignment is required before access is granted	Organizations maintain tighter governance over partition data visibility, ensuring admins access only the data they are explicitly authorized for.

SPM Overview of **Minor** New Features and Enhancements

Description | Business problems it solves

New Feature/ Enhancement	What's changed	Business Outcomes
<u>Extended Security for EWD Partitions</u> Enterprise Wide Deployments	A new store application adds ACL-based security on top of existing partition role-based access, providing a second layer of data control for enterprise deployments.	Organizations with strict data separation requirements can enforce partition boundaries at the record level, not just at the role level.
<u>Programs in SPW</u> Strategic Planning or Portfolio Planning	Existing legacy programs now appear as a new L1 option in Strategic Planning Workspace, with a portfolio plan automatically created for each program.	Legacy program users access modern SPW functionality without manual setup, making the transition incremental rather than requiring an all-at-once migration.

MCP for SPM

IT Portfolio Insights

What would you like to do?

Can you provide me with some insights on the project PRJ0010814 — Mobile App Development?

PRJ0010814 - Mobile App Development
Project Insights

Overall Health: CRITICAL RED
Project Status: Work in Progress (20% Complete)
Health Score: **RED**
Action Required: IMMEDIATE

Area	Status	Key Issue
Resources	RED	David Brow
Schedule	GREEN	On track (d
Cost	GREEN	Within bud
Scope	YELLOW	3 open char

Critical Issues

Write a message...

Claude is AI and can make mistakes

SPM MCP Server
AI integration for SPM related tools

Server details

OAuth setup required. You can create a new OAuth integration or use an existing one to connect a client. [Set up OAuth](#)

Basic information

This record is in the MCP for Strategic Portfolio Management application. [Switch scope](#)

Label: SPM MCP Server Name: SN_SPM_mcp_spm_server

Application: MCP for Strategic Portfolio Management

Server URL: https://fowes@sn.service-now.com/sncaas/mcp-server/mcp/sn_spm_mcp_server

Short description: AI integration for SPM related tools

\$ Advanced and/or Prime

Portfolio intelligence without leaving chat—same ServiceNow governance, live from your AI client

- 1 Ask your portfolio questions in AI Client (Claude, Copilot etc) and get answers instantly, same ACLs and audit trail enforced
- 2 Get AI-powered project & portfolio risk detection and recommendations that run domain logic on ServiceNow, not guesses from the model - governance validated at every step
- 3 Generate status reports in chat with stakeholder ready answers – role-based visibility, full audit and no context switching required

Today, the SPM MCP Server spans use cases for **goals, portfolio plans, and projects**

What it can to today

Strategic Planning: Goals Framework

- ✓ Retrieve goals and objectives for any owner, timeline, or status
- ✓ Generate AI-powered insights on goal health, targets, aligned work, and risks
- ✓ Answer "What is the state of this OKR and what should I do about it?" in one query

TOOLS: `get_goals`, `generate_goal_insights`

Strategic Planning: Portfolio Management

- ✓ Retrieve portfolio plans with flexible filtering by owner or timeline
- ✓ Generate AI-powered portfolio insights in natural language for executive conversations
- ✓ Surface at-risk projects, delayed start and end dates, and misalignments across the portfolio

TOOLS: `get_portfolio_plans`, `generate_portfolio_insights`

Project Management

- ✓ Retrieve projects by owner, timeline, or status and analyze status trajectory
- ✓ Detect project risks, surface recommendations, and identify RIDAC gaps
- ✓ Generate Red, Amber, Green (RAG) status reports across resources, cost, schedule, and scope from live project data

TOOLS: `get_projects`, `generate_project_insights`, `identify_project_risks`, `get_ai_status_report`

What that means in practice

PRODUCT MANAGER / GOAL OWNER

"What is the state of this OKR and what should I do about it?"

Goal health surfaced → summary of goal and targets → aligned work flagged → recommendations for overcoming risks

PORTFOLIO MANAGER / PRODUCT MANAGER

"Show me our Q3 portfolio plans. Which projects are at risk and what dependencies are misaligned?"

At-risk projects identified → delayed starts and ends flagged → dependency misalignments surfaced for action

PROJECT MANAGER

"What's the health of my Q3 implementation project? What risks should I focus on?"

Status trajectory analyzed → RIDAC risks detected and saved as AI drafts for review → RED/AMBER/GREEN status across cost, schedule, scope, and resources

MCP for SPM

Fact Sheet

Why we added it

SPM MCP moves live strategic data into those tools instead of forcing you to tab back to dashboards for every decision.

How you activate it

- Portfolio Planning (*SPM Adv Licensing*)
- Strategic Planning (*SPM Prime Licensing*)
- Project Workspace (*SPM Adv Licensing*)
- MCP for SPM

Licensing

SPM Advanced and/or Prime

Who to target

Portfolio Managers
Project Manager

Technical

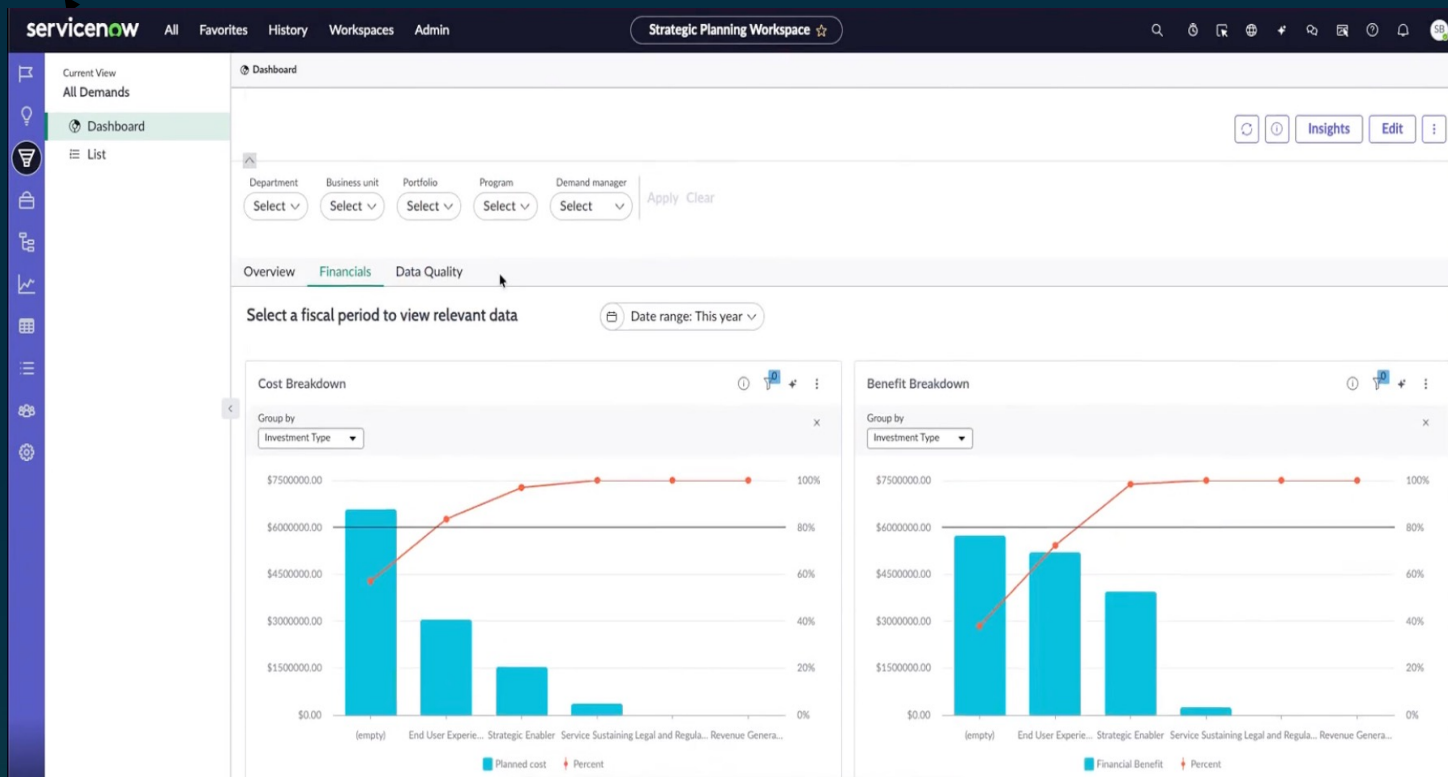
Pre-built MCP server connecting your AI client to ServiceNow via OAuth. Live data, user-by-user access control, full audit trail. No raw API wrappers. No DIY infrastructure.

Before / After

Before: Create custom MCP to integrate AI Clients with ServiceNow SPM

After: Now, use the OOTB to access SPM data in AI Client of preference

Demand Management Enhancements



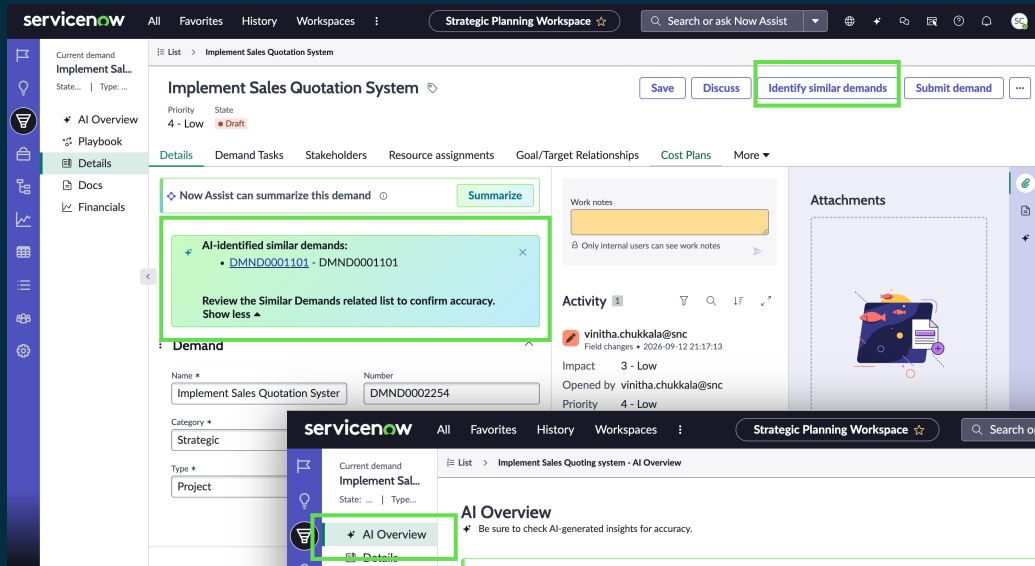
\$ Advanced and/or Prime

Demand management that keeps every stakeholder informed, from intake to execution

- 1 Manage demands end-to-end with greater confidence — from consistent financial planning and AI-assisted summarization, to requesters who can track their own submissions without needing to ask
- 2 Eliminate the gaps that slow demand teams down — disconnected financial views, manual effort to interpret demand context, and requesters who don't know where their request stands.
- 3 Empower every stakeholder in the demand lifecycle — portfolio managers get financial and analytics parity with projects, demand managers get AI-assisted context on every record, and requesters get visibility into their submissions from intake through execution.
- 4 **Reduce** time spent on status updates, manual financial tracking, and incomplete submissions — so demand and portfolio managers can focus on evaluation and prioritization rather than administration.

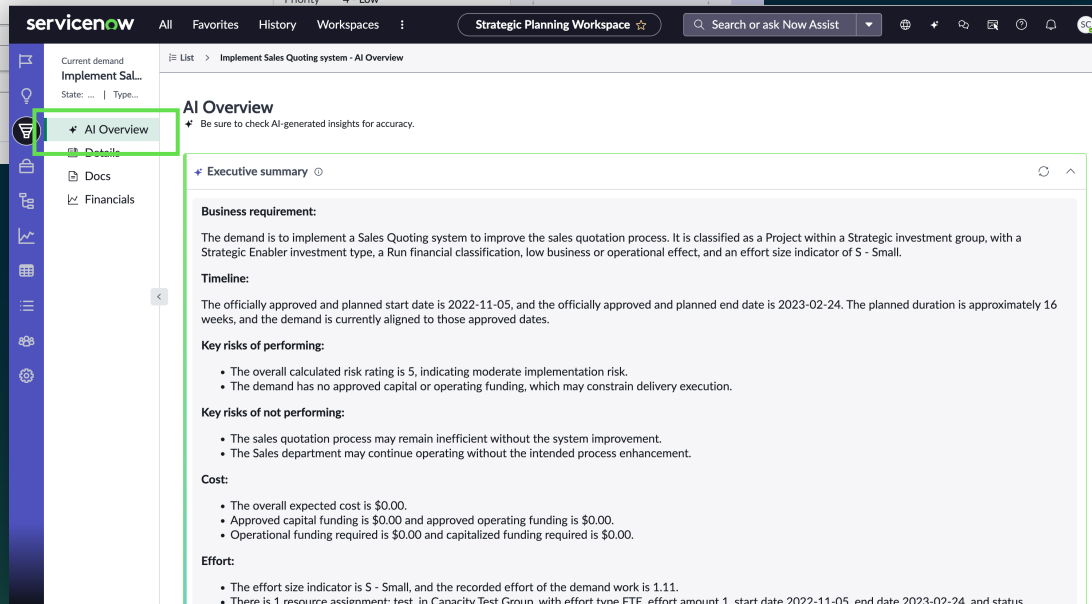
AI-Powered Demand Intelligence

Similar Demands



ServiceNow interface showing the 'Implement Sales Quotation System' demand record. The 'Identify similar demands' button is highlighted. Below it, a pop-up displays 'AI-identified similar demands' with a list containing 'DMND0001101 - DMND0001101'. A message states: 'Review the Similar Demands related list to confirm accuracy. Show less'.

Demand Summarization

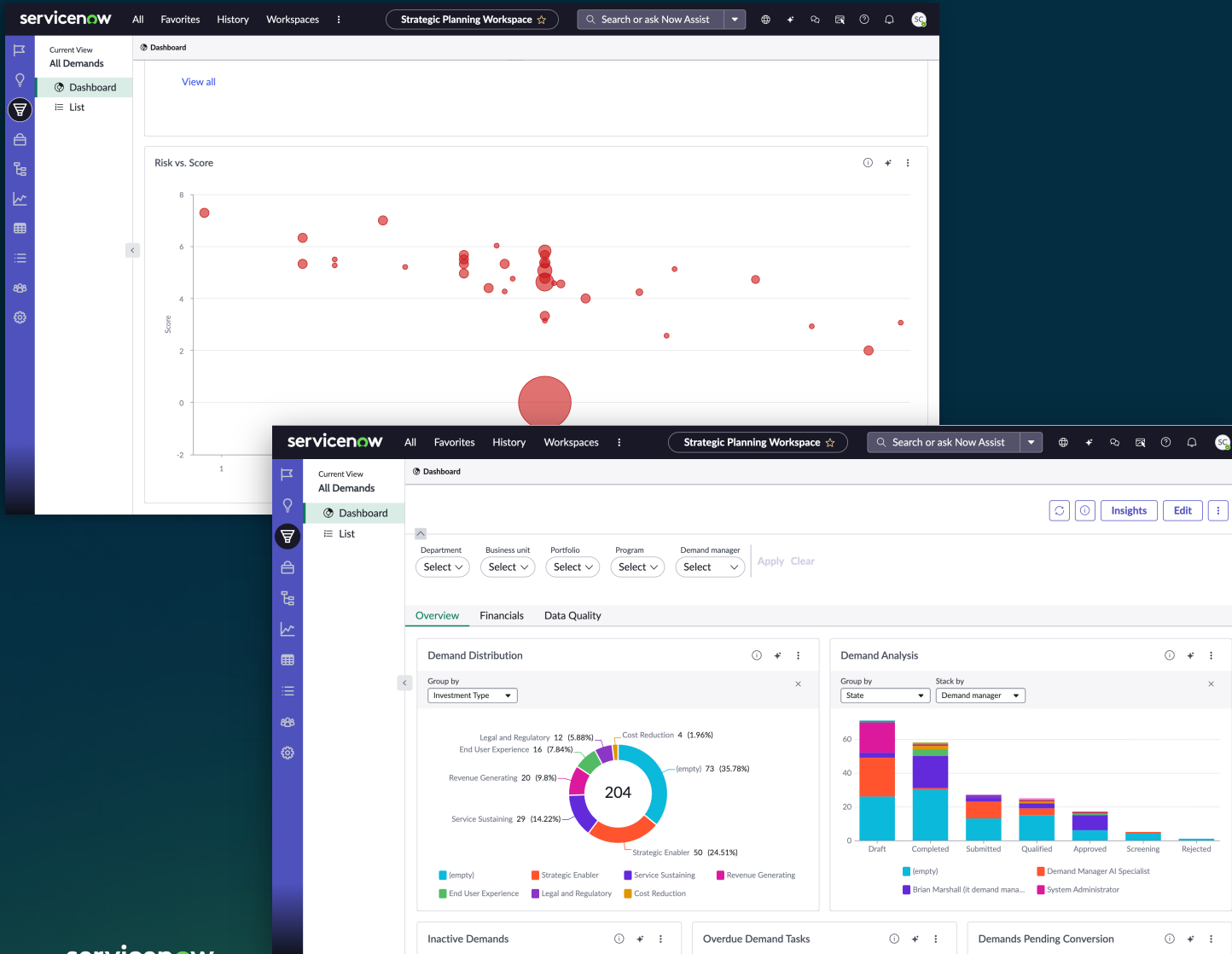


ServiceNow interface showing the 'Implement Sales Quotation System - AI Overview' page. The 'AI Overview' tab is highlighted. The page displays an 'Executive summary' with the following sections:

- Business requirement:** The demand is to implement a Sales Quoting system to improve the sales quotation process. It is classified as a Project within a Strategic investment group, with a Strategic Enabler investment type, a Run financial classification, low business or operational effect, and an effort size indicator of S - Small.
- Timeline:** The officially approved and planned start date is 2022-11-05, and the officially approved and planned end date is 2023-02-24. The planned duration is approximately 16 weeks, and the demand is currently aligned to those approved dates.
- Key risks of performing:**
 - The overall calculated risk rating is 5, indicating moderate implementation risk.
 - The demand has no approved capital or operating funding, which may constrain delivery execution.
- Key risks of not performing:**
 - The sales quotation process may remain inefficient without the system improvement.
 - The Sales department may continue operating without the intended process enhancement.
- Cost:**
 - The overall expected cost is \$0.00.
 - Approved capital funding is \$0.00 and approved operating funding is \$0.00.
 - Operational funding required is \$0.00 and capitalized funding required is \$0.00.
- Effort:**
 - The effort size indicator is S - Small, and the recorded effort of the demand work is 1.11.
 - There is 1 resource assignment: test, in Capacity Test Group, with effort type FTE, effort amount 1, start date 2022-11-05, end date 2023-02-24, and status

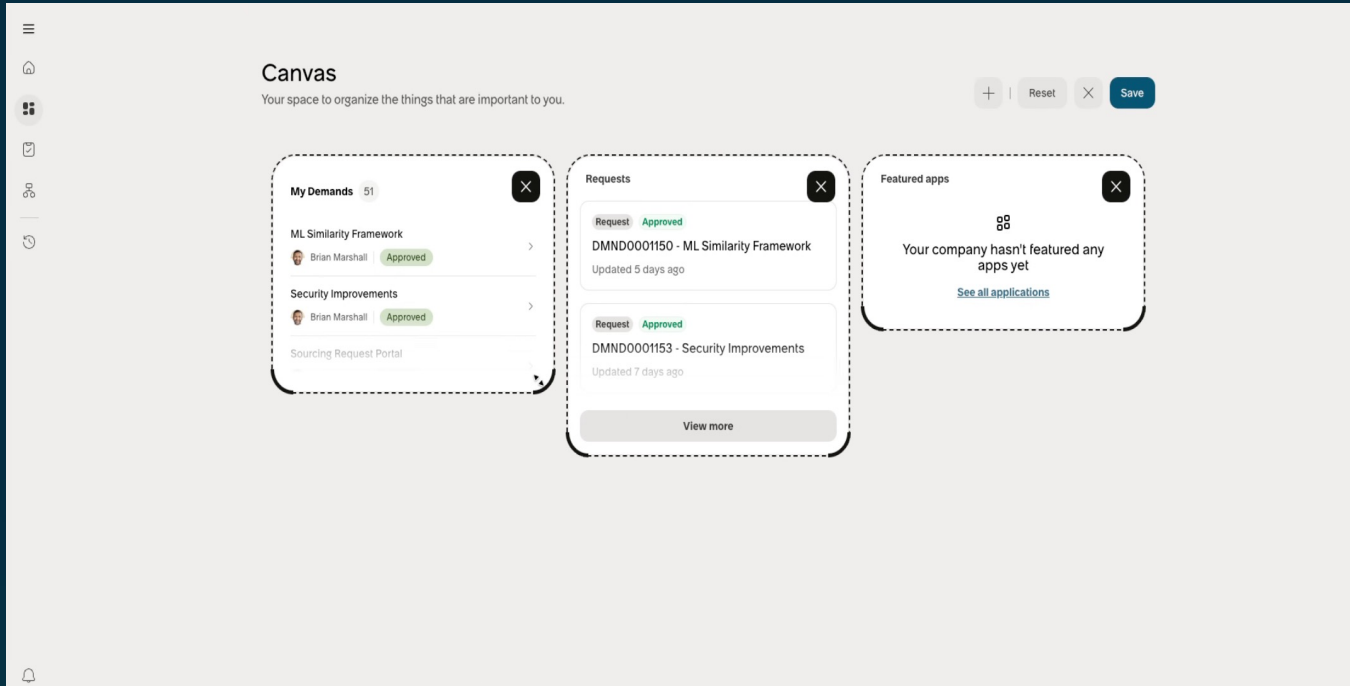
- Get instant context on any demand through a cleaner AI Overview tab, without having to read through the full record history or chase down the original requester.
- Identify potentially duplicate or overlapping demands before they progress through the review cycle, using AI that compares name, description, and business case content at an 85% similarity threshold.
- Customize which fields feed into the AI summary and clone the prompt to match your organization's language, so AI output reflects your priorities rather than a fixed template..

Demands - Financial & Analytics Parity



- **Manage** demand financials directly inside the demand workspace using the same grid experience already familiar from Project Workspace — no context switching or tool juggling required.
- **Replace** the static demand workbench with a fully editable dashboard that covers financial data, data quality metrics, and portfolio distribution — all in one configurable view.
- **Reconfigure** the bubble chart to surface the dimensions that matter most to your team, giving each portfolio manager a view tailored to their priorities rather than a fixed default.
- **Compare** demands and projects on equal financial footing, with a consistent grid experience across both that reduces the learning curve and makes cross-portfolio analysis straightforward.

Demands - Requester Empowerment



- Empower requesters to track their own demands — including lifecycle stage and post-conversion project status — directly from their employee portal, without contacting the demand team for updates.
- Reduce incomplete submissions by guiding requesters through demand creation conversationally via Moveworks, auto-populating fields and surfacing related catalog items before a form is submitted.
- Add a My Demands widget to the employee portal canvas so requesters always have a live view of everything they've submitted, its current state, and what it has converted into.
- Cut status-chasing conversations for demand managers by giving requesters direct visibility into where their demand stands at every stage of the lifecycle.

Demand Management Enhancements

Fact Sheet

Why we added it

Demand managers and portfolio managers were managing financial data for demands in a separate context from the rest of SPM. The old demand workbench provided a static bubble chart and list view with no ability to customize columns or edit the chart itself. Customers using the workbench had limited options for tailoring the view to their portfolio's priorities, and there was no financial grid equivalent to what existed in Project Workspace — creating an inconsistent experience across the platform

How you activate it

- Portfolio Planning (*SPM Adv Licensing*)
- Strategic Planning (*SPM Prime Licensing*)
- Moveworks??

Licensing

SPM Advanced

Who to target

Portfolio Managers
Demand Managers

Technical

XXX

Before / After

Before: No financial grid in demand records; managed separately. Static demand workbench with fixed bubble chart columns. Bubble chart columns could not be changed

After: Financial grid available directly on the demand record, consistent with Project Workspace. Editable platform dashboard with configurable bubble chart and demand analytics. Columns, dimensions, and dashboard layout fully configurable per team

Project Workspace Enhancements

✦ Powered by ServiceNow Otto

\$ Advanced and/or Prime

The screenshot shows the ServiceNow Project Workspace interface. A modal titled 'Generate project plan' is open, featuring a two-step process: 1. Provide context and 2. Review project details. The first step is active, showing a text area for project description and an 'Attach files' button. An example text is provided: '6-month digital transformation to modernize legacy systems, migrate data to the cloud, and redesign the customer portal. Include tasks for change management and stakeholder communication.' Below this, a file named 'WBS_Cloud_Infrastructure_Automation.xlsx' (9.2 KB) is listed under 'Attachments'. The modal has 'Cancel' and 'Next' buttons at the bottom. The background interface shows the 'Project Workspace' header, navigation tabs, and a list of projects.

Spend less time setting up projects and more time running them

- 1 Generate a structured project plan from documents your team already has — Word, PDF, Excel, or PowerPoint — with phases, tasks, and milestones extracted automatically, so project managers are not starting from a blank slate.
- 2 Review how uploaded content maps to the project structure before anything is created, giving project managers control to adjust scope and correct any gaps before committing — reducing rework after the fact.
- 3 Add Dynamic content on Project Docs and edit list view of Projects – providing users better usability

Project Plan Generation — Performance & Accuracy

✦ Powered by ServiceNow Otto

The screenshot illustrates the workflow for generating a project plan using ServiceNow Otto. It shows three main components:

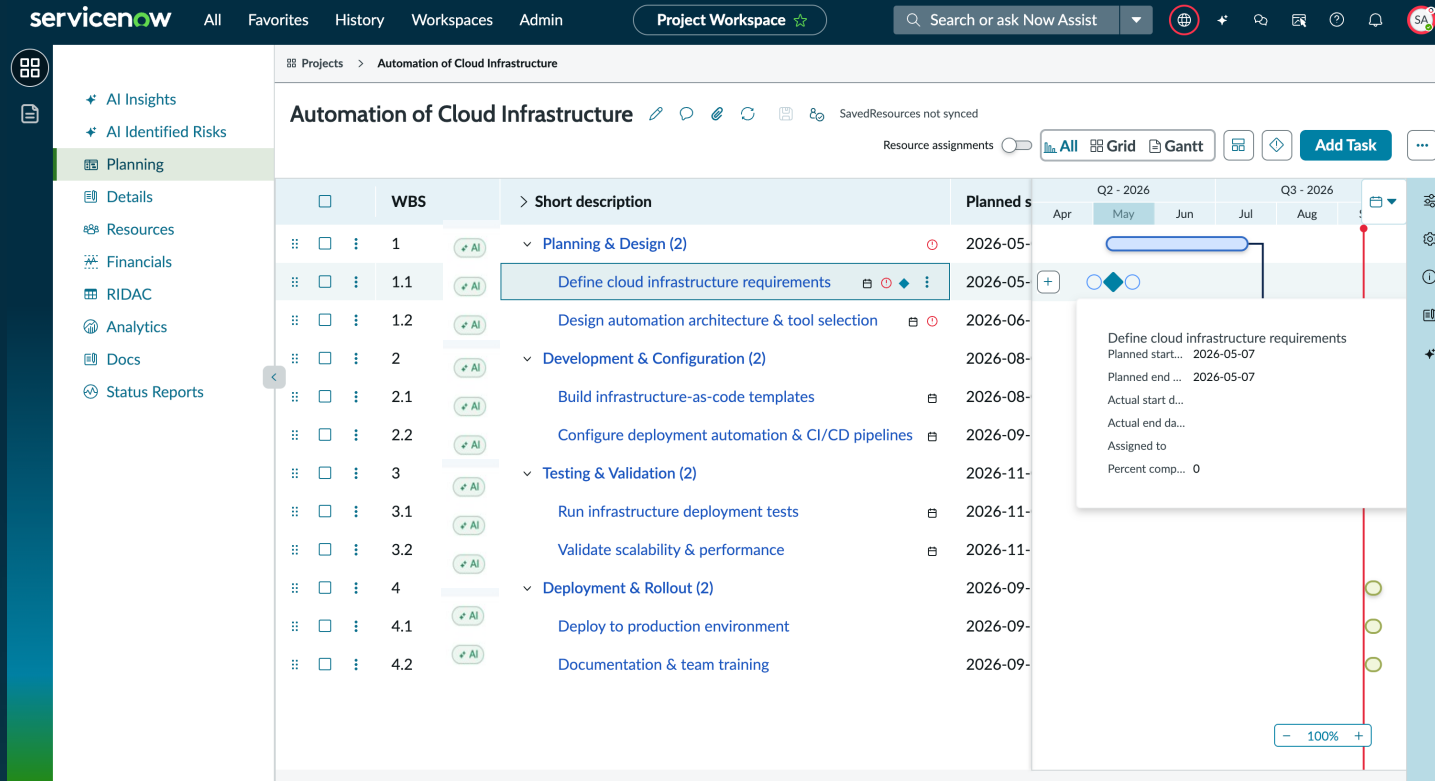
- Upload Document:** A file named 'WBS_Cloud_Infrastructure...' is uploaded. A table of tasks is visible in the document preview.
- Review:** A 'Generate project plan' dialog box is shown, indicating '12 tasks detected' and listing tasks with their descriptions and durations.
- Generated Project:** The final project plan is displayed in a Gantt chart view, showing tasks like 'Planning & Design', 'Define cloud infrastructure', 'Design automation', 'Development & Configuration', 'Build infrastructure-as-code', 'Configure deployment automation', 'Testing & Validation', 'Run infrastructure deployment tests', 'Validate scalability & performance', 'Deployment & Rollout', 'Deploy to production environment', and 'Documentation & team training'.

ID	Task Name	Phase	Duration (days)	Status	Dependencies
1.0	Planning & Design	Phase 1	10	Completed	
1.1	Define cloud infrastructure requirements	Phase 1	5	Completed	
1.2	Design automation architecture & tool selection	Phase 1	5	Completed	1.1
2.0	Development & Configuration	Phase 2	20	In Progress	
2.1	Build infrastructure-as-code templates (IaC)	Phase 2	12	In Progress	
2.2	Configure deployment automation & CI/CD pipelines	Phase 2	8	Not Started	
3.0	Testing & Validation	Phase 3	10	Not Started	
3.1	Run infrastructure deployment tests	Phase 3	5	Not Started	
3.2	Validate scalability & performance	Phase 3	7	Not Started	
4.0	Deployment & Rollout	Phase 4	10	Not Started	
4.1	Deploy to production environment	Phase 4	5	Not Started	
4.2	Documentation & team training	Phase 4	4	Not Started	

- **Upload** existing project documentation — Word, PDF, Excel, or PowerPoint — and receive a structured plan with phases, tasks, and dependencies generated automatically, without starting from a blank slate
- **Reduce manual setup time** by letting AI interpret unstructured content from documents your team already has, rather than re-entering information that exists elsewhere
- **More accurate outputs** as continued model tuning and prompt refinement improve how uploaded content translates into a structured project plan

Milestone Extraction

Powered by ServiceNow Otto



- Capture milestones automatically from uploaded documents — if your documentation references milestones or key milestones, they are pulled directly into the generated project plan without manual identification
- Preserve the intent of your source documents by ensuring key delivery markers are not lost in translation when moving from unstructured files into a structured project plan
- Save the review step of manually checking whether critical milestones were included — the system surfaces them as part of generation

Plan Review Stage

Generate project plan

12 tasks detected Tasks will be automatically imported when you save the project. No need to upload again

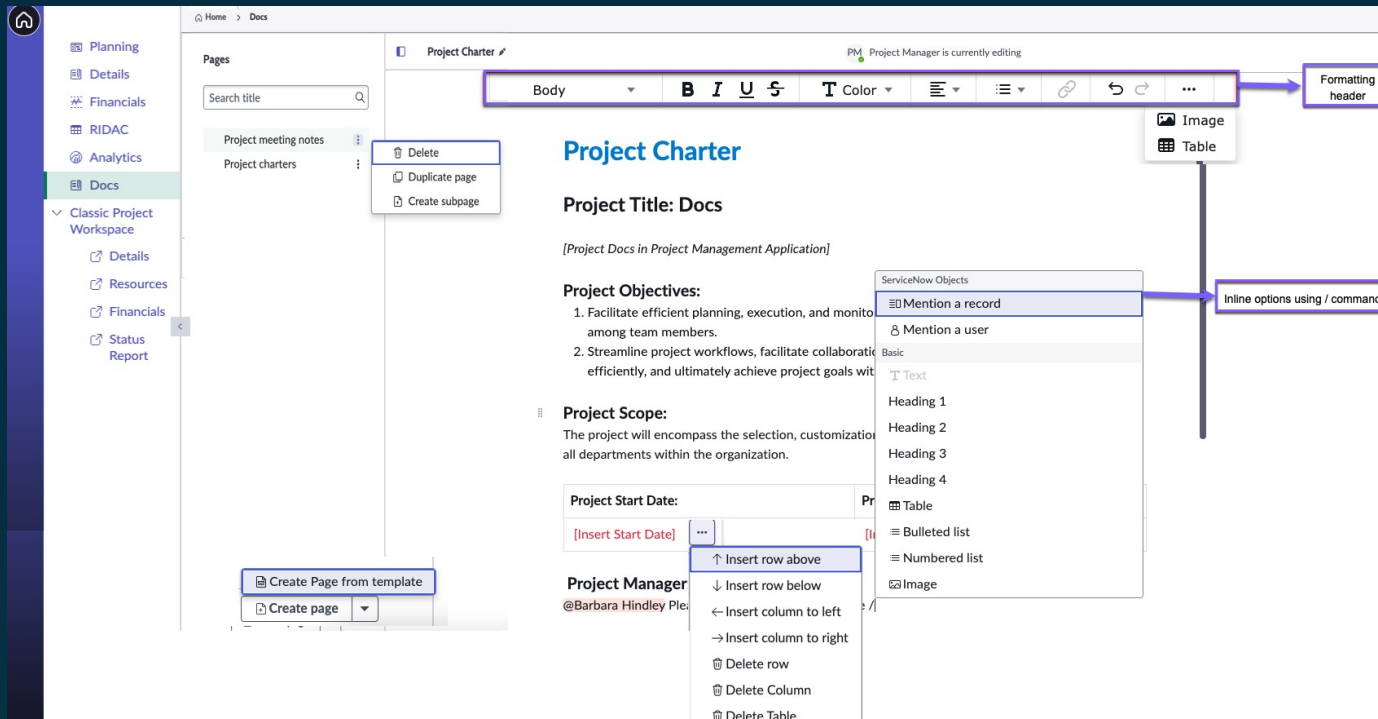
All tasks **Tasks with error**

☐	L.	Short description	Description	Planned...	Planned...	Plan
☐	▲	Planning & Design	Planning & ...			10 c
☐	▲	Define cloud infrastruc...	Define clou...			5 da
☐	▲	Design automation archite...	Design the a...			5 da
☐	▲	Development & Configura...	Developmen...			20 c
☐	▲	Build infrastructure-as-co...	Build infrast...			12 c
☐	▲	Configure deployment aut...	Configure d...			8 da

Back **Create Project**

- Review how uploaded content maps to the project structure before any record is created, so project managers can verify the interpretation is correct before committing
- Adjust scope and correct gaps at the review stage rather than after the project has been generated, reducing rework and re-creation of tasks
- Stay in control of the AI-generated output — the review stage ensures the plan reflects your intent, not just the system's interpretation of your documents

Dynamic Content in Docs



- Pull live project data, tables, and fields directly into project documents using a backslash trigger, so documentation stays connected to the actual project plan rather than becoming outdated the moment it is written
- Extend the same capability already available in status reports into project docs, giving teams a consistent way to embed real project data across any document they create in the workspace
- Eliminate manual copy-paste of project information into documents — dynamic content references the source directly, reducing the risk of stale or inconsistent data in project documentation

Edit Projects in List View

The screenshot displays the ServiceNow interface for the 'Projects' list view. The left sidebar shows a navigation menu with 'Projects' expanded, including options like 'My projects', 'All projects', 'Project templates', and 'Project RIDAC'. The main area shows a table of projects with columns: Number, Project name, Project manager, Portfolio, Approved start date, and Approved end date. The table lists 10 projects, including 'AI GENERATED_PROJECT' and 'Sanitize KB Articles'. Two popups are visible: one for 'Automate Monthly Upg' and another for '2026-09-08 08:00:00', both with 'Cancel' and 'Apply' buttons. The top navigation bar includes 'servicenow', 'All', 'Favorites', 'History', 'Workspaces', 'Admin', and a 'Project Workspace' tab. A search bar and 'Export', 'New' buttons are also present.

Number	Project name	Project manager	Portfolio	Approved start date	Approved end date
PRJ0010001	AI GENERATED_PROJECT 2026-09-08 00:28:13			2026-09-08 08:00:00	2026-09-09 17:00:00
PRJ0010002					
PRJ0010004					
PRJ0010005	Implementation	System Administrator		2026-09-16 08:00:00	
PRJ0010006	Sanitize KB Articles	System Administrator		2026-09-15 08:00:00	
PRJ0010007	HR Attendance Tool			2026-09-16 08:00:00	
PRJ0010008	AI Adoption Initiatives			2026-09-16 08:00:00	2026-09-16 17:00:00
PRJ0010009	Cloud Migration			2026-09-16 08:00:00	2026-09-16 17:00:00
PRJ0010010	HR Management System Implementation			2026-03-01 08:00:00	2026-12-31 17:00:00

- Update project fields directly from the list view without navigating to the details page, saving the extra steps that added friction to routine edits
- Make quick changes to projects in sequence from a single view, rather than opening and closing individual records for each update
- Maintain list view context while editing — project managers stay oriented within their full portfolio view rather than losing context by navigating away to a details page

Project Q&A with ServiceNow Otto

The top screenshot shows the ServiceNow Project Assistant interface for the 'Acme New Hire Surveys' project. The workspace includes a WBS view with a table of tasks:

WBS	Short description
1	Initiation (3)
2	Planning
3	Dev Execution (5)
4	Delivering
5	Closing

The bottom screenshot shows the 'Now Assist' panel with a query for worknotes from the last 2 weeks. The results are displayed in a table:

Date	Author	Dimension	Record	Note
2026-08-25	vibha.sharma1@snc	Task	PRJTASK0010194 - Dev Execution	This task is currently at risk because key stakeholders have limited availability for review and approval.
2026-08-25	vibha.sharma1@snc	Task	PRJTASK0010194 - Dev Execution	Several activities are dependent on

- Bug fixes and accuracy improvements applied to the Ask Otto conversational panel based on customer and internal stakeholder feedback received after the initial release.
- Work notes from tasks, resources, and RIDAC are able better query through the same panel with date filters — currently returning a list of relevant work notes, with summarization planned as a follow-on enhancement.
- Ask Otto delivers more reliable responses based on direct feedback from early adopters. Project managers can now query work notes across tasks, resources, and RIDAC with date filters directly from the conversational panel, without navigating to individual records.

Project Workspace Enhancements

Fact Sheet

Why we added it

Project managers were losing time correcting inaccurate AI-generated plans, manually re-entering milestones from source documents, and fixing plans after creation with no review opportunity. Separately, project documentation disconnected from live plan data the moment it was written, and routine edits required navigating away from the list view entirely.

How you activate it

- Project Workspace

Licensing

SPM Advanced

Who to target

Portfolio Managers
Project Managers

Technical

AI model tuning and prompt refinement improve plan generation accuracy from uploaded documents. Milestone extraction added to the generation pipeline. A pre-creation review step lets users inspect content mapping before committing. Dynamic content in docs uses a backslash trigger to pull live project fields and tables. Inline editing enabled directly from list view.

Before / After

Before: Inaccurate outputs required significant manual correction post-creation. Milestones lost during generation — re-entered manually. Projects created immediately with no inspection opportunity. Project Docs were Static — disconnected from plan data immediately after creation. Edits required navigating to the details page for each project

After: Project managers now receive more accurate AI-generated plans from uploaded documents with less post-creation rework. Milestones are automatically extracted from source documents and included in the plan. A pre-creation review step lets users inspect and adjust content mapping before committing. Project docs stay connected to live plan data through dynamic content, and routine edits can be made inline directly from the list view without losing portfolio context

Hybrid Project Management

Powered by ServiceNow Otto

The screenshot displays the ServiceNow Project Workspace interface. The top navigation bar includes 'All', 'Favorites', 'History', 'Workspaces', and 'Admin'. The main content area shows a project plan for 'Automation of cloud infrastructure management and d...'. The plan is organized into a table with columns for 'WBS', 'Short description', 'Planned sta...', 'Planned en...', 'Assigned to', and a Gantt chart. A green box highlights the 'Testing & Validation' section, which includes tasks like 'Reconfig Efforts', 'Run infrastructure deployment t...', and 'Validate scalability & performan...'. Below the project plan, a 'Resource a...' section shows a list of tasks and their assigned resources.

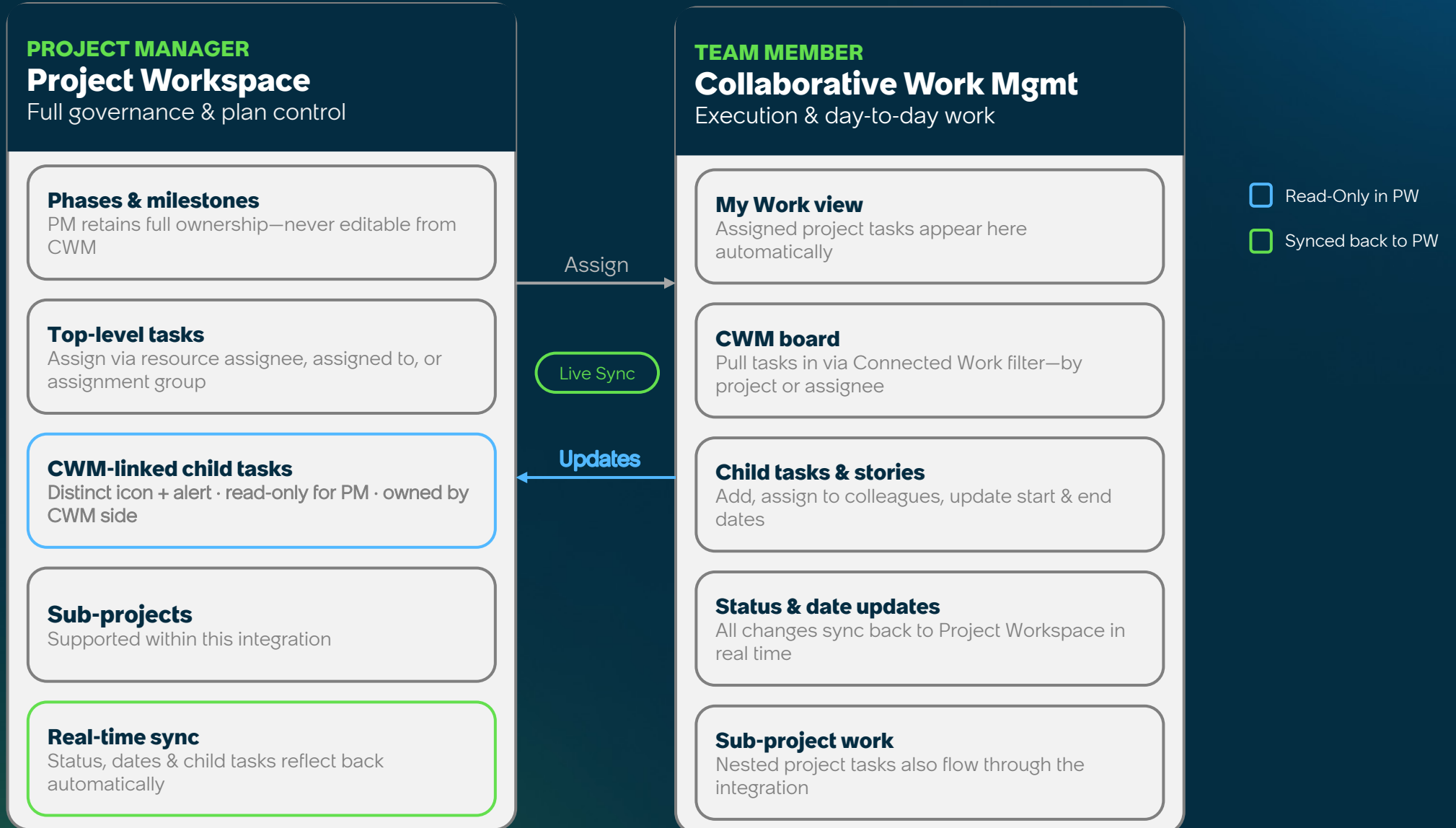
WBS	Short description	Planned sta...	Planned en...	Assigned to
1	Planning & Design (3)	2026-03-05	2026-03-13	cwm
2	Development & Configuration	2026-03-04	2026-05-14	Kevin
3	Testing & Validation (3)	2025-01-01	2026-02-09	Abel T
	Reconfig Efforts	2026-08-04	2026-10-14	Abel T
	Run infrastructure deployment t...	2026-09-13	2026-10-06	Abel T
	Validate scalability & performan...	2026-09-01	2026-10-01	Abel T

Advanced and/or Prime

Spend less time setting up projects and more time running them

- 1 Generate a structured project plan from documents your team already has — Word, PDF, Excel, or PowerPoint — with phases, tasks, and milestones extracted automatically, so project managers are not starting from a blank slate.
- 2 Review how uploaded content maps to the project structure before anything is created, giving project managers control to adjust scope and correct any gaps before committing — reducing rework after the fact.
- 3 Access project activity and work notes from tasks, resources, and RIDAC directly through the Ask Auto conversational panel, with date filters, so project managers can surface what's happened across a project without manually hunting through records.

Hybrid Project Management. - PWS + CWM



Hybrid Project Management. - PWS + CWM

PROJECT MANAGER

Project Workspace

Full governance & plan control

- ✓ View CWM tasks associated to the project without navigating and creating separate integrations – providing full governance
- ✓ Identify tasks rolled-up from CWM with Board icon
- ✓ Status synced directly into Project Workspace
- ✓ Alert icon notifying that the tasks are read-only

Hybrid Project Management – PWS + CWM

Fact Sheet

Why we added it

Project managers and team members were working in separate tools with no synchronization — project managers had no real-time visibility into team activity without manually chasing updates.

How you activate it

- Project Workspace
- Collaborative Work Management

Licensing

SPM Advanced

Who to target

Portfolio Managers
Project Managers

Technical

Project managers assign resources in Project Workspace. Assigned tasks appear automatically in the team member's CWM My Work view and can be pulled onto boards via the Connected Work filter. Team members add child tasks and stories, update status and dates in CWM, and all changes reflect back into Project Workspace in real time. CWM-linked tasks display with a distinct icon in Project Workspace — project managers retain governance over the parent plan but cannot edit CWM-side tasks.

Before / After

Before: Project managers and team members worked in separate environments with no synchronization. Project managers had no visibility into team-level activity unless they manually followed up, and team members had no way to see their project-assigned work inside CWM.

After: Project managers assign work in Project Workspace and receive real-time updates from CWM without any manual follow-up. Team members see their assigned project work directly in CWM, break it down into tasks and stories, assign across their team, and update status — all of which reflects back into the project plan automatically. Both personas stay in their preferred environment while working from a single synchronized view of project progress.

Automatic Target Status Calculation

The screenshot shows the ServiceNow Goals interface. The top navigation bar includes 'servicenow', 'All', 'Favorites', 'History', 'Workspaces', and 'Admin'. The current workspace is 'Strategic Planning Workspace'. The main content area is titled 'Engineering goals' and shows a table of goals. The table has columns for 'Goals and targets', 'Actual', and 'Status'. The 'Actual' column is highlighted in purple, and the 'Status' column is highlighted in green. The table lists several goals, including 'Accelerate the velocity of product development' and 'Boost team members career development'. A 'Check-in actuals' modal is open on the right, showing a 'Time period' of '2026 Q2', a 'Planned target' of '40', and an 'Actual' value of '32'. The 'Status' is set to 'Yellow'. The modal also has a 'Remark' field and 'Cancel' and 'Save' buttons.

Goals and targets	Actual	Status
Accelerate the velocity of product development		
Increase sprint velocity by 80%	20	22 Green
Reduce average code review time by 50%		
Reduce the average number of bugs per feature from 2 to 1		
Boost team members career development		
Complete 1 training for AI native app development		
Conduct the first EduCamp for engineering team on the security topic		
Increase the EVS score for "career development" question from 7.2 to 9.0		
Improve the quality of our product		
Reduce the average number of new bug reports from 72 to 60		
Increase code coverage from 45% to 80%		

\$ Prime

Target status that stays current without the extra step

- 1 Eliminate the manual step of selecting and saving a RAG status after every check-in — the system calculates and sets it automatically the moment actuals are entered, so target owners focus on the work, not the admin.
- 2 Ensure every check-in period has a populated status across all targets, giving leaders a consistent and trustworthy view of goal health without chasing incomplete records or second-guessing whether a Green status was actually entered or just never updated.
- 3 Set what Green, Yellow, and Red mean for your organization by configuring the threshold values that govern automatic calculation — so status reflects your performance standards, not a generic default.

Automatic Target Status Calculation

The screenshot shows the ServiceNow interface for configuring the system property `sn_gfa.target.auto_status.thresholds`. The page title is "System Property - sn_gfa.target.auto_status.thresholds". A notification at the top states: "You are editing a record in the Goal Framework for SPM application (cancel)".

The configuration form includes the following fields:

- Suffix:** `target.auto_status.thresholds`
- Name:** `sn_gfa.target.auto_status.thresholds`
- Description:** Enables automatic Red/Yellow/Green status for target periods and defines its thresholds. When enabled, each period's status comes from how far the actual has progressed from the start value toward the planned target: $(\text{actual} - \text{start value}) \div (\text{planned target} - \text{start value}) \times 100$ — Green $\geq 90\%$, Yellow 75–90%, Red $< 75\%$. Adjust these values to tune how on-track, at-risk, and off-track periods are classified. When disabled, automatic status is turned off and period status is not calculated or updated by the system.
- Choices:** (Empty list)
- Type:** `string`
- Value:** `{"enabled": true, "thresholds": [{"green": 90, "yellow": 75}]}`
- Ignore cache:** ☒
- Private:** ☐
- Read roles:** `sn_gf.goal_admin`
- Write roles:** `sn_gf.goal_admin`

Buttons for **Delete** and **Update** are located below the form. At the bottom, there is a table with columns **Categories**, **Order**, and **Search**. The table is currently empty, displaying "No records to display".

- A new system property (`sn_gfa.target.auto_status.thresholds`) governs automatic status calculation — enabled by default
- Status is calculated as percentage achievement of actual against planned target for each check-in period using the following default thresholds:
 - 90% or above → Green
 - 75–89% → Yellow
 - Below 75% → Red
- Status is set automatically the moment the target owner clicks outside the actuals field — no save action required
- Threshold values are configurable by admins — organizations can adjust the Green / Yellow / Red ranges to match their own performance standards
- The feature can be disabled entirely via the system property, reverting to manual status entry for organizations that prefer that approach
- Target owners retain the ability to override the automatically calculated status — the system sets a default, not a lock
- Applies consistently across all check-in periods for a target, ensuring every period has a populated status

Automatic Target Status Calculation

Fact Sheet

Why we added it

Target owners were required to manually select and save a RAG status every time they checked in actuals — a step that was easy to skip, inconsistently applied, and added friction to an already repetitive task. When status fields were left blank or incorrectly set, it created data quality gaps across the organization's goal reporting. Leaders reviewing goal health could not trust that a Green status reflected actual performance — it might simply mean no one had updated it. This also placed an unnecessary burden on target owners to interpret their own numbers and translate them into a status, rather than just recording what happened.

How you activate it

- Strategic Planning
- Goal Framework for SPM

Licensing

SPM Prime

Who to target

Portfolio Managers

Technical

- Status is automatically calculated when actuals are entered, using configurable Green / Yellow / Red thresholds — no manual selection needed
- Admins can adjust the threshold ranges to match their organization's performance standards, or disable the feature entirely
- Target owners can override the auto-calculated status at any time, keeping teams in control of the final value

Before / After

Before: Target owners manually selected and saved a RAG status after every check-in. No configurable standard — each person interpreted their own numbers

After: Status is automatically set as soon as actuals are entered — no additional step required. Automatic calculation is the default; target owners can still override when context requires it

Portfolio AI Insights

✦ Powered by ServiceNow Otto

The screenshot displays the ServiceNow Portfolio AI Insights interface. The main view shows a table of planning items for 'Engineering FY26'. An overlay panel titled 'AI Insights' is open, displaying a list of insights including 'Planning items with delayed starts', 'Items by impact severity', 'Top root causes', and 'Recommended actions'. The 'Recommended actions' section suggests approving budget for AI Benefits management.

Prioritization	Roadmap	Kanban	Hierarchy	Capacity	Financials
Grouped by: None (Drag the column headings here to set groups, or select 'Group by' from the column menu)					
	Ra...	1.	Name	Total Budget	
		1	Sales quote generation in Logiq		
		2	CRM Account data deprecation		
		3	Auto trigger downsell alerts		
		4	Integration RM data with Logiq		
		5	Trigger projects for complex quotes		
		6	Payment gateway migration		
		7	Mobile App Design		
		8	Manufacturing supply chain optimization		
		9	Kubernetes server maintenance		
		10	Sales onboarding project		
		11	Randomization of Test data for AI		
		12	HR access approval portal		
		13	Analytics Dashboard		
Total					

\$ Advanced and/or Prime

Surface portfolio risks earlier, understand why they're happening, and act before they escalate

- 1 Monitor your entire portfolio for schedule, financial, and resource risks in one AI-powered panel — without manually reviewing each planning item or waiting for project managers to surface issues
- 2 Understand the root cause behind every flagged item — whether it's delayed milestones, over-allocated resources, or labor and cost plan variances — so decisions are grounded in data, not assumptions
- 3 Access AI-generated recommendations alongside each insight, giving portfolio managers a starting point for action rather than having to determine next steps independently
- 4 Stay current by regenerating insights on demand to reflect the latest project data, with an expandable panel view and a per-insight info icon that explains exactly what data each insight is analyzing.

Portfolio AI Insights - Projects at Risk

✦ Powered by ServiceNow Otto

The screenshot displays the ServiceNow Portfolio Planning workspace for 'Engineering FY26'. The main view is a table of projects with columns for 'Ra...', 'Name', and 'Total Budget'. The table lists 13 projects, including 'Sales quote generation in Logiq', 'CRM Account data deprecation', 'Auto trigger downsell alerts', 'Integration RM data with Logiq', 'Trigger projects for complex quotes', 'Payment gateway migration', 'Mobile App Design', 'Manufacturing supply chain optimization', 'Kubernetes server maintenance', 'Sales onboarding project', 'Randomization of Test data for AI', 'HR access approval portal', and 'Analytics Dashboard'. An 'AI Insights' overlay is visible on the right, showing 'Projects at risk' with 2 impacted items, 'Items by impact severity' (2 - Critical), and 'Items forecasting over budget' with a forecast variance of -\$50.84K. The overlay also shows 'Top root causes' and 'Recommended actions'.

	Ra...	Name	Total Budget
1		Sales quote generation in Logiq	
2		CRM Account data deprecation	
3		Auto trigger downsell alerts	
4		Integration RM data with Logiq	
5		Trigger projects for complex quotes	
6		Payment gateway migration	
7		Mobile App Design	
8		Manufacturing supply chain optimization	
9		Kubernetes server maintenance	
10		Sales onboarding project	
11		Randomization of Test data for AI	
12		HR access approval portal	
13		Analytics Dashboard	
Total			

- Surface projects with underlying issues — delayed tasks, milestone dependencies at risk, and over-allocated resources — before those issues cause visible delays in the plan
- See the full impact of each at-risk project, including monetary benefit at stake and downstream dependencies that could be affected
- Act early using AI-generated recommended actions based on identified root causes, giving portfolio managers a concrete starting point for intervention

Portfolio AI Insights - Items Forecasting Over Budget

✦ Powered by ServiceNow Otto

The screenshot displays the ServiceNow Portfolio Planning workspace for Engineering FY26. The main table lists 13 items with their names and total budgets. Two AI Insights overlays are shown, providing detailed budget variance analysis.

Item	Name	Total Budget
1	Sales quote generation in Logiq	
2	CRM Account data deprecation	
3	Auto trigger downsell alerts	
4	Integration RM data with Logiq	
5	Trigger projects for complex quotes	
6	Payment gateway migration	
7	Mobile App Design	
8	Manufacturing supply chain optimization	
9	Kubernetes server maintenance	
10	Sales onboarding project	
11	Randomization of Test data for AI	
12	HR access approval portal	
13	Analytics Dashboard	
Total		

AI Insights - Items forecasting over budget

Forecast variance (FY26)
-\$50.84K

Capex: +\$69.80K Opex: -\$120.64K

1 of 31 items exceed their budget forecast. 'Under-budgeted' and 'Actuals above plan' drive 100% of the forecast variance.

Items by impact severity
● 1 - Critical

Portfolio is \$145.84K (41.7%) over budget overall.

Impact - all items - FY26

Total budget vs. forecast
Capex: \$350.00K budget → \$375.20K Forecast **-\$25.20K**
Opex: \$0.00K budget → \$120.64K Forecast **-\$120.64K**

Top root causes - by driver

- Under-budgeted
1 Item - budget was set below forecast at baseline approval
Customer NPS monitoring dashboard
Spend: hardware and cloud costs
- Actuals above plan
1 Item - non-labor spend over plan
Customer NPS monitoring dashboard
Cost type: Hardware Capex - Spend: hardware and cloud costs

Recommended actions

AI Insights - Impact - all items - FY26

Total budget vs. forecast
Capex: \$350.00K budget → \$375.20K Forecast **-\$25.20K**
Opex: \$0.00K budget → \$120.64K Forecast **-\$120.64K**

Top root causes - by driver

- Under-budgeted
1 Item - budget was set below forecast at baseline approval
Customer NPS monitoring dashboard
Spend: hardware and cloud costs **-\$50.84K**
- Actuals above plan
1 Item - non-labor spend over plan
Customer NPS monitoring dashboard
Cost type: Hardware Capex - Spend: hardware and cloud costs **-\$5.00K**

Recommended actions

Cost variance in last fiscal period [FY26: M07]

Category	Variance
Overspend	-\$18.96K
Underspend	+\$40.20K

across 2 cost plans

1 planning item has variance between planned and actual cost in last fiscal period. Rate and effort variance account for 47.0% of the variance. 'Other spend' and 'Effort / hours overrun' drive 100% of the overspend variance.

Items by impact severity
● 1 - Critical

Impact - all items - FY26

- Identify planning items where the forecast is exceeding the approved budget, with AI analysis that examines labor effort, resource rates, currency rates, and non-labor cost plan patterns as root causes

- Pinpoint the specific cost plan drivers behind each variance — whether it's higher-than-estimated labor hours, rate increases, or non-labor spend categories like hardware or CapEx

Reduce the time spent manually reviewing cost plans by letting AI identify patterns and commonalities across multiple items, surfacing the most significant drivers in one view

Portfolio AI Insights - Enhanced AI Insights Panel

✨ Powered by ServiceNow Otto

The screenshot displays the ServiceNow Portfolio AI Insights interface. The main panel shows a list of projects under the 'Engineering FY26' planning item. The projects are ranked by impact, with the top item being 'Sales quote generation in Logiq'. An 'AI Insights' panel is overlaid on the right, providing detailed analysis for the selected project. This panel includes sections for 'Impact - all items - FY26', 'Top root causes - by driver', 'Cost variance in last fiscal period', and 'Items by impact severity'.

Rank	Name	Total Budget
1	Sales quote generation in Logiq	
2	CRM Account data deprecation	
3	Auto trigger downsell alerts	
4	Integration RM data with Logiq	
5	Trigger projects for complex quotes	
6	Payment gateway migration	
7	Mobile App Design	
8	Manufacturing supply chain optimization	
9	Kubernetes server maintenance	
10	Sales onboarding project	
11	Randomization of Test data for AI	
12	HR access approval portal	
13	Analytics Dashboard	

AI Insights Panel Data:

- Impact - all items - FY26**
 - Total budget vs. forecast
 - Capex: \$350.00K budget → \$375.20K Forecast (-\$25.20K)
 - Opex: \$0.00K budget → \$120.64K Forecast (-\$120.64K)
- Top root causes - by driver**
 - Under-budgeted** (Budget vs EAC)
 - 1 Item - budget was set below forecast at baseline approval
 - Customer NPS monitoring dashboard: Spend: hardware and cloud costs (-\$50.84K)
 - Actuals above plan** (Plan vs actual)
 - 1 Item - non-labor spend over plan
 - Customer NPS monitoring dashboard: Cost type: Hardware Capex - Spend: hardware and cloud costs (-\$5.00K)
 - Recommended actions**
- Cost variance in last fiscal period [FY26: M07]**
 - Overspend: **-\$18.96K** across 2 cost plans
 - Underspend: **+\$40.20K** across 3 cost plans
 - 1 planning item has variance between planned and actual cost in last fiscal period. Rate and effort variance account for 47.0% of the variance. 'Other spend' and 'Effort / hours overrun' drive 100% of the overspend variance.
- Items by impact severity**
 - 1 - Critical

- Expand the insights panel to a full view for deeper analysis, without losing context of the portfolio plan underneath
- Regenerate insights on demand to reflect the latest updates across your planning items — no need to wait for a scheduled refresh
- Understand what each insight is analyzing through a per-insight info icon that explains the methodology, data considered, and how impact and root causes are determined
- See the most critical insights first with reordered priority — Projects at Risk surfaces at the top so portfolio managers focus attention where it matters most



Portfolio AI Insights

Fact Sheet

Why we added it

Portfolio managers had no proactive signal for projects heading toward risk or budget overruns until issues were already visible in the schedule or financials. Budget-related issues were the top customer ask from PAC sessions and remained unaddressed after the initial schedule-focused insights in Q2.

How you activate it

- Strategic Planning (*SPM Prime Licensing*)

Licensing

SPM Prime

Who to target

Portfolio Managers
Demand Managers

Technical

Three new insights added to the AI Insights panel in Strategic Planning Workspace: Projects at Risk surfaces underlying schedule, resource, and financial pressures before delays occur; Items Forecasting Over Budget identifies cost plan variances across labor, rates, and non-labor categories; Actuals Over Budget flags where spend has already exceeded approved budget. Panel enhanced with expandable full view, on-demand regeneration, per-insight info icon, and priority-based reordering.

Before / After

Before: The AI Insights panel contained three schedule-focused insights only. Portfolio managers had no AI-assisted view of financial risk, and the panel offered no way to expand, regenerate, or understand the methodology behind each insight.

After: Portfolio managers can monitor schedule, financial, and resource risk across their portfolio from a single expanded AI Insights panel, with root cause analysis, recommended actions, and full transparency into how each insight is generated — refreshable on demand as project data changes.

RIDAC

servicenow All Favorites History Workspaces Strategic Planning Workspace Search or ask AI

RIDAC

Default li... My lists All RIDAC - Risks 33 Last refreshed just now.

1 filter 1 Sort by Group by

Number	Short description	Planning Item	Planning item type	Top Portfolio	Top Program	State
RSK0001001	Integration Risks			HR	HR Digital Transformation Program	Pending
RSK0001023	Resource sourcing constraint			Application Modernization		Work in Progress
RSK0001009	Monitor Cals & Reporting			HR	HR Digital Transformation Program	Pending
RSK0001015	Benefit Shortfall			HR		Open
RSK0001004	CSI Program Level Risk - Demo			Enterprise Ventures		Pending
RSK0001018	Changing Priorities			HR		Open
RSK0001031	Ability Change Standing Data			HR	HR Digital Transformation Program	Pending
RSK0001029	Risk of losing confidentiality of data			Sales	Sales Enablement Program	Pending

Showing 1-20 of 33

Records per page 20

Advanced and/or Prime

Manage risks, issues, decisions, and actions in one consistent, editable experience across your entire portfolio

- 1 Access all RIDAC items — risks, issues, decisions, actions, and change requests — through a single, consistent navigation experience with separate tabs per type, replacing a grid layout that required individual record navigation
- 2 Edit inline and action multiple records at once across any RIDAC type, removing the friction of opening individual records to make routine updates
- 3 Understand exactly how AI identifies risks through a new info icon on the AI Identified Risks skill, and trust that manually created risks are kept cleanly separate from AI-generated ones
- 4 Track RIDAC across the full delivery lifecycle — the related list is now extended to demands, epics, features, and iterations, so risks and issues are visible wherever work is being managed

RIDAC by Type

Number	Short description	Planning Item	Planning item type	Top Portfolio	Top Program	State
RSK0001001	Integration Risks			HR	HR Digital Transformation Program	Pending
RSK0001009	Monitor Cals & Reporting			HR	HR Digital Transformation Program	Pending
RSK0001015	Benefit Shortfall			HR		Open
RSK0001018	Changing Priorities			HR		Open
RSK0001031	Ability Change Standing Data			HR	HR Digital Transformation Program	Pending
RSK0001029	Risk of loosing confidentiality of data			Sales	Sales Enablement Program	Pending
RSK0001033	Data availability			Application Modernization		Open
RSK0001027	New compensation change plan			HR		Work in Progress

- Navigate RIDAC by type — risks, issues, decisions, actions, and change requests each have their own tab, making it faster to find and work within a specific category without filtering a combined grid

- Edit records inline and perform actions across multiple rows at once, capabilities that were not available in the previous grid layout

- Retain all existing RIDAC functionality within the new experience — existing customers will see both views during transition, while new customers move directly into the updated navigation

RIDAC as Related List

The screenshot displays the ServiceNow RIDAC (Risk, Issue, Decision, Action, Change) interface. The top navigation bar includes the ServiceNow logo, tabs for All, Favorites, History, and Workspaces, and a search bar. The main header shows 'Strategic Planning Workspace' and a search bar. The left sidebar contains a tree view with categories: All RIDAC, Project RIDAC, Portfolio Risks, and Program Risks. The 'All RIDAC - Risks' list is currently selected, showing 33 items. The table columns are: Number, Short description, Planning Item, Planning item type, Top Portfolio, Top Program, and State. The table lists various risks such as 'Integration Risks', 'Resource sourcing constraint', 'Monitor Cals & Reporting', 'Benefit Shortfall', 'CSI Program Level Risk - Demo', 'Changing Priorities', 'Ability Change Standing Data', and 'Risk of losing confidentiality of data'. The bottom of the table shows 'Showing 1-20 of 33' and 'Records per page 20'.

Number	Short description	Planning Item	Planning item type	Top Portfolio	Top Program	State
RSK0001001	Integration Risks			HR	HR Digital Transformation Program	Pending
RSK0001023	Resource sourcing constraint			Application Modernization		Work in Progress
RSK0001009	Monitor Cals & Reporting			HR	HR Digital Transformation Program	Pending
RSK0001015	Benefit Shortfall			HR		Open
RSK0001004	CSI Program Level Risk - Demo			Enterprise Ventures		Pending
RSK0001018	Changing Priorities			HR		Open
RSK0001031	Ability Change Standing Data			HR	HR Digital Transformation Program	Pending
RSK0001029	Risk of losing confidentiality of data			Sales	Sales Enablement Program	Pending

- Track risks, issues, decisions, and actions directly on demands, epics, features, and iterations — the same related list experience already available on projects is now extended across the full delivery hierarchy
- Reduce context switching for teams managing agile and hybrid delivery by surfacing RIDAC items on the records where work is actually happening, rather than requiring navigation to a separate view
- Maintain a consistent risk and issue management practice across waterfall and agile delivery without requiring teams to manage separate tracking processes

AI Identified Risks

The top screenshot shows the ServiceNow AI Identified Risks interface. The main grid displays risks generated by AI, with columns for Number, Short description, Description, Impact, Probability, AI rationale, and Mitigation plan. The bottom screenshot shows the same grid with a tooltip explaining how AI Identified Risks work, including a 'How AI Identified Risks works' section and a 'Reviewing a risk' section.

How AI Identified Risks works

AI analyzes your project data for early warning signs, flags risks before they derail your goals, and pre-populates draft risk records so you only need to review and approve.

Consider: Schedule task delays, milestone slippage, dependency delays, Resource (overallocation, conflicts), Cost (Budget overrun, cost variance)

Reviewing a risk: Select a risk and click **Accept** to save it and move it into the RIDAC, or **Reject** to close it as skipped.

See the AI rationale column on each record for the specific reasoning behind that risk. [Learn more](#)

- An info icon added directly to the AI Identified Risks skill page explains the skill methodology, what data is being considered, how risks are flagged, and links to the supporting community article.
- A bug fix ensures manually created risks no longer inherit the AI Draft state, which is reserved exclusively for AI-generated risks. Accepted AI risk hyperlinks now redirect to RIDAC by Type rather than the legacy All RIDAC grid view.
- Users can understand the AI risk identification methodology directly on the page without leaving the application. Manually created risks are cleanly separated from AI-generated ones, and accepted risk links route directly into the updated RIDAC by Type experience.

RIDAC

Fact Sheet

Why we added it

Managing risks, issues, decisions, and actions across a portfolio required navigating a combined grid with no type-level separation, and RIDAC visibility was limited to projects — leaving agile and hybrid delivery teams without a consistent way to track risks on their work.

How you activate it

- Strategic Planning (*SPM Adv Licensing*)

Licensing

SPM Advanced and/or Prime

Who to target

Portfolio Managers
Demand Managers

Technical

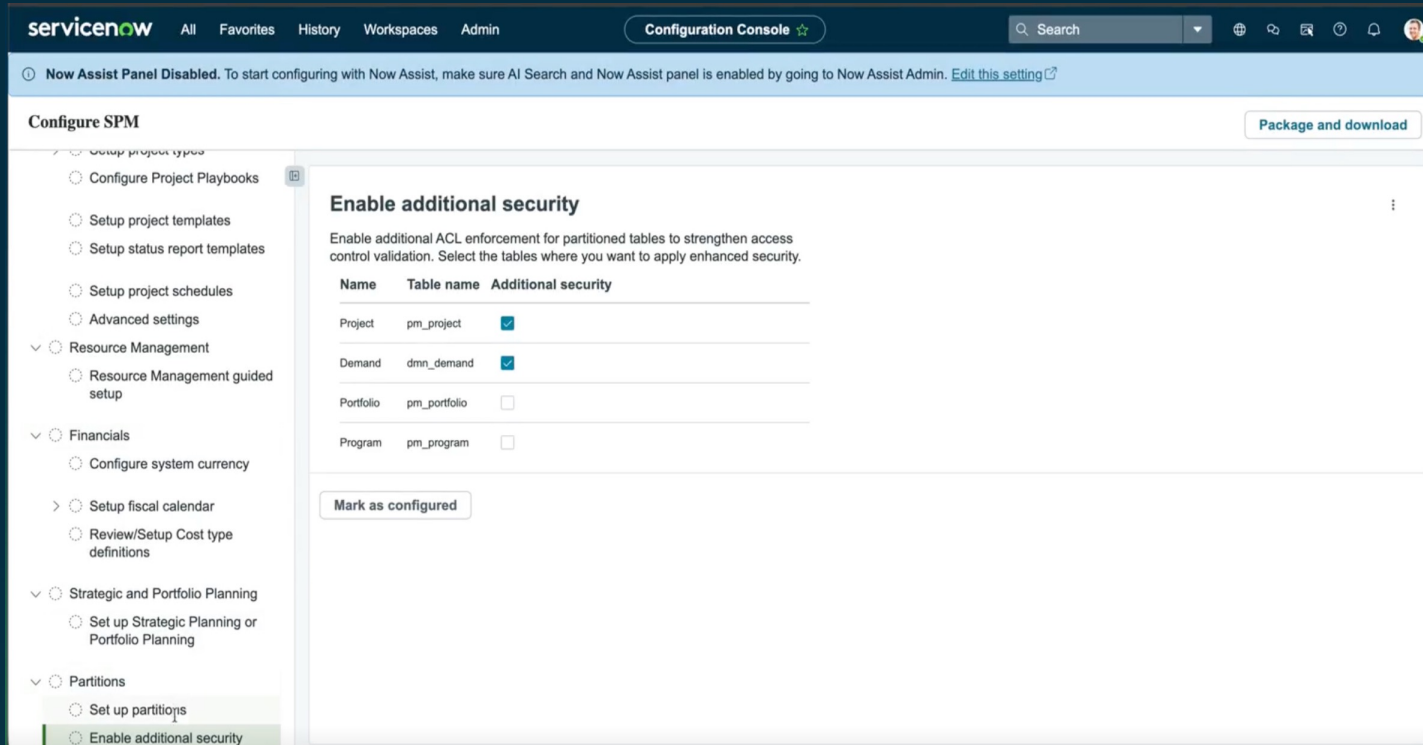
RIDAC navigation restructured into separate tabs per type — risks, issues, decisions, actions, change requests — with inline editing and multi-row actions. Data model extended to support RIDAC on goals and EAP iterations. RIDAC added as a related list on demands, epics, features, and iterations. RIDAC also available as a filtered list within portfolio plans.

Before / After

Before: All RIDAC types were managed in a single combined grid with no type-level separation, no inline editing, and no visibility on agile delivery entities such as epics, features, and iterations.

After: RIDAC is accessible by type across a consistent tabbed experience with inline editing, available as a related list across the full delivery hierarchy, and visible within portfolio plans — giving project, agile, and portfolio teams a unified approach to risk and issue management.

Enterprise-Wide Deployment — Security

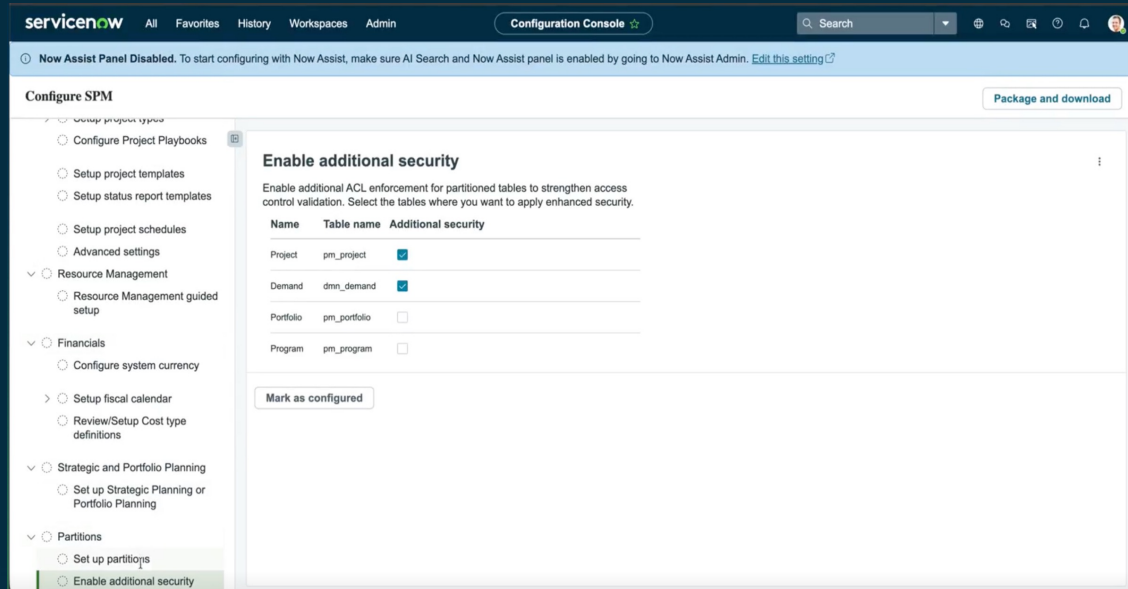


\$ Advanced and/or Prime

Stronger, more configurable security controls for organizations running SPM at enterprise scale

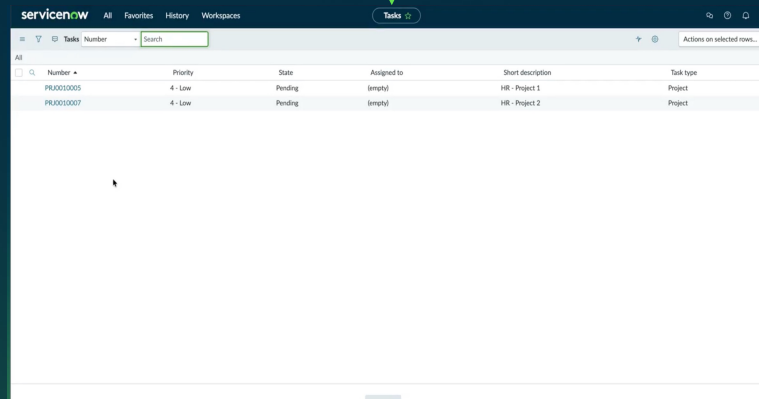
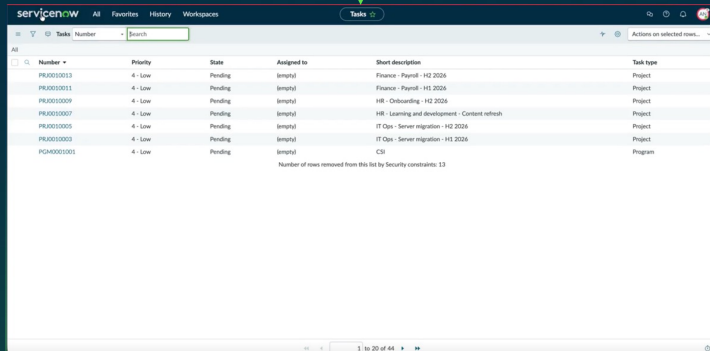
- 1 Add a second layer of security to partition-based deployments through ACLs, giving organizations granular control over who can access data within each partition — beyond what role-based access alone provides
- 2 Control whether system administrators can access partition data by default — admin access is now off unless explicitly granted through partition roles, addressing a key concern raised during early customer testing
- 3 Deploy with greater confidence in multi-partition environments, knowing that both access control and administrative data visibility are configurable to your organization's governance requirements

Extended Security for EWD Partitions



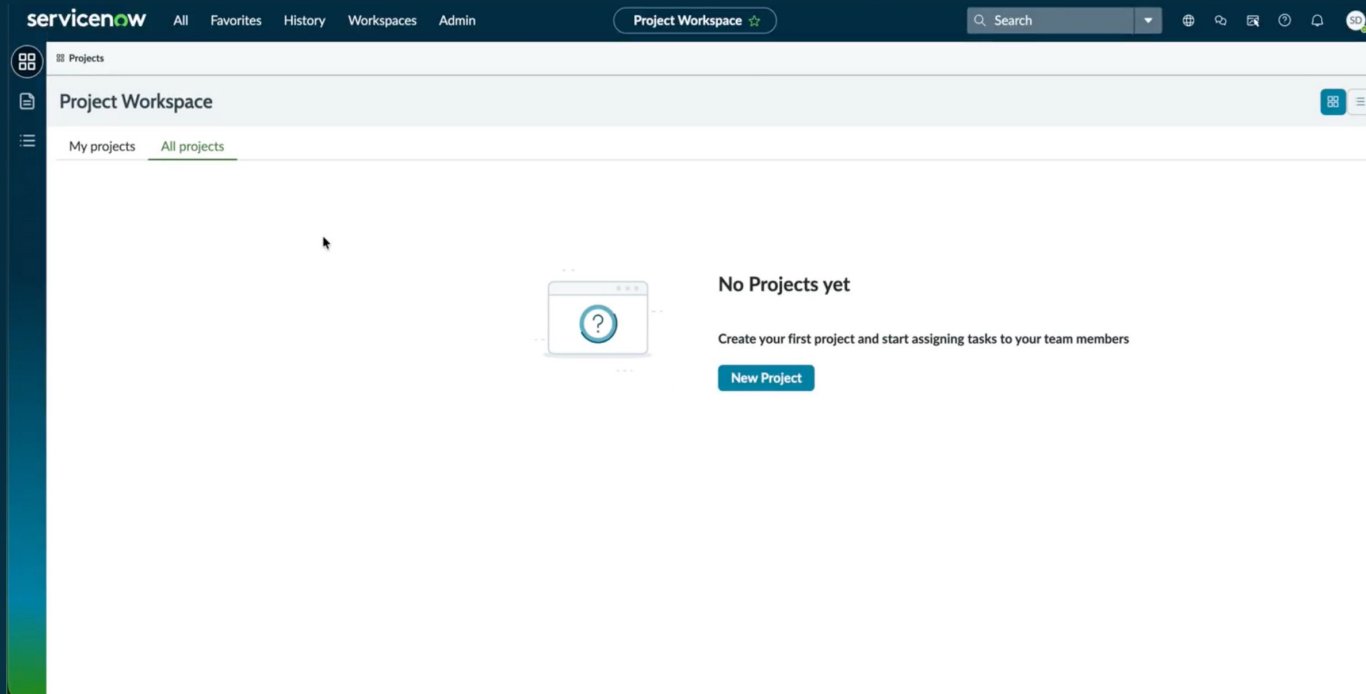
Without enabling ACLs, user could still access projects from `task.list` even though partitions disabled it earlier

After enabling ACLs, user CANNOT access projects from `task.list`



- Apply a second layer of access control to EWD partitions through a new store application that introduces ACLs on top of existing partition role-based security
- Meet more stringent data separation requirements for organizations where partition boundaries must be enforced at the record level, not just at the application or role level
- Install selectively — the extended security application is available via the store, allowing organizations to adopt it based on their specific governance and compliance requirements

Admin Access Control for Partition Data



- Default to 'false' access for system administrators — partition data is no longer accessible to admins by default, requiring explicit assignment of partition roles before access is granted
- System property:
`sn_spm_ewd.allow_admin_access_to_all_partitions`
- Address the governance gap identified by customers during early partition testing, where admin-level access to all partition data created an unintended data visibility risk
- Configure access boundaries clearly for each partition, giving organizations control over which administrators can see which partition's data — without relying on platform-wide admin privileges as a bypass

Enterprise-Wide Deployment — Security

Fact Sheet

Why we added it

Customers deploying SPM across large enterprises needed stricter data separation between partitions than role-based access alone could provide, and system admin visibility into partition data was broader than required by governance standards.

How you activate it

- Portfolio Planning (*SPM Adv Licensing*)
- Strategic Planning (*SPM Prime Licensing*)

Licensing

SPM Advanced

Who to target

Portfolio Managers
Project Managers

Technical

A new store application adds ACL-based security as a second layer on top of existing partition role assignments. System administrator access to partition data is now off by default, requiring explicit partition role assignment before access is granted.

Before / After

Before: Partition security relied solely on role-based access, with no record-level enforcement. System administrators had default visibility into all partition data regardless of whether that access was needed or authorized.

After: Organizations can enforce partition data boundaries at the record level through ACLs, and system administrators access only the partition data they are explicitly authorized for, supporting stricter governance requirements across enterprise deployments

Programs in SPW

servicenow All Favorites History Workspaces Strategic Planning Workspace Search or ask AI

Programs

Programs 6 Filter 11 Sort by Group by

Program Name	Status	Portfolio	Top program	Percent complete	Program manager	Planned start date	Planned end date
Operator contains 5 values selected. Value Edit filter	Operator is Value	Operator is Value	Operator contains Value	Operator is Value	Operator On yyyy-MM-dd	Operator On yyyy-MM-dd	
☐ Sales Enablement Program	Green	Sales	Sales Enablement Program	9.07%	George Tukis (Program Manager)	2020-08-10 00:00:00	2022-12-30 19:16:10
☐ HR Digital Transformation Program	Red	HR	HR Digital Transformation Program	4.73%	George Tukis (Program Manager)	2020-09-21 08:00:00	2022-11-26 17:00:00
☐ Cloud Transformation	Yellow	Application Modernization	Cloud Transformation	3.93%	George Tukis (Program Manager)	2020-11-02 00:00:00	2023-06-30 00:00:00
☐ Career Evolution and Recognition	Green	HR	Career Evolution and Recognition	0%	George Tukis (Program Manager)	2021-03-01 00:00:00	2022-06-30 00:00:00
☐ HR & Employee Engagement Program	Green			0%	George Tukis (Program Manager)	2021-06-01 00:00:00	2021-12-31 01:00:00
☐ CSI	Green	Enterprise Ventures		0%	Megan Burke (Portfolio Manager)	2024-01-23 00:00:00	2027-02-01 04:30:00

Showing 1-6 of 6 1 Records per page 20

\$ Advanced and/or Prime

Bring your existing programs into Strategic Planning Workspace — without starting from scratch

- 1 Access all your existing legacy programs directly from a new L1 menu in Strategic Planning Workspace, without having to navigate away from the workspace or recreate program structures you already have
- 2 Start working in the modern portfolio planning experience immediately — the system automatically creates a portfolio plan for each of your programs, so teams are not faced with a manual setup process before they can begin using SPW functionality
- 3 Transition at your own pace — the Programs L1 gives existing program users a familiar entry point into SPW, making adoption incremental rather than requiring an all-at-once migration from legacy programs

Programs in SPW

The screenshot displays the ServiceNow Strategic Planning Workspace (SPW) interface. The top navigation bar includes the ServiceNow logo, tabs for All, Favorites, History, and Workspaces, and a search bar labeled 'Search or ask AI'. The main content area is divided into two sections: 'CSI - Planning' and 'CSI - RIDAC'.

CSI - Planning View:

- Left sidebar: Planning, Details, RIDAC.
- Top tabs: Prioritization (selected), Roadmap, Kanban, Hierarchy, Capacity, Financials.
- Buttons: Portfolio insights, New demand.
- Grouped by: None (Drag the column headings here to set groups, or select 'Group by' from the column menu).
- Table columns: Ra... (Rank), Name, Planning state, Planning item type, MoSCoW.
- Table data:

Ra...	Name	Planning state	Planning item type	MoSCoW
1	Contract Migration Playbook & Program	Prioritized	Demand	1 - Must
2	Seal Contracts Search and Analytics	In Review	Demand	2 - Should
3	Replace Legacy CS with ServiceNow	Prioritized	Demand	2 - Should
4	FY25 Replace Legacy CS with ServiceNow	Prioritized	Demand	2 - Should
5	Develop Workday SN Integration	New	Demand	1 - Must
6	Attendance Management System	Prioritized	Demand	1 - Must
7	Workday Time Tracking for Employees with Temporary Work Schedules	New	Demand	2 - Should

CSI - RIDAC View:

- Left sidebar: Planning, Details, RIDAC.
- Top tabs: Risks (selected), Issues, Decisions, Actions, Request Changes.
- Buttons: Edit, Export.
- Table columns: Number, Short description, Planning Item, Planning item ty..., Top Portfolio, Top Program, State.
- Table data:

Number	Short description	Planning Item	Planning item ty...	Top Portfolio	Top Program	State
RSK0001004	CSI Program Level Risk - Demo			Enterprise Ventures		Pending
RSK0001008	Demand Level Risk - Demo	Contract Migration Playbook & Program	Demand	Digital/Business Transformation	CSI	Pending

Showing 1-2 of 2. Records per page: 20.

- Access model — users who already have SPW and program access can view the auto-created portfolio plan without any additional setup or sharing step. Access is inherited from existing role assignments, not manually configured per plan
- RIDAC within the Program Plan — RIDAC items are available within the program plan as a filtered list, covering both the program-level entities and the planning items within it. Users can filter by project, portfolio, or program. Decisions, actions, and change requests are being added to programs specifically as part of this release

Programs in SPW

Fact Sheet

Why we added it

A large number of customers actively use legacy programs but had no pathway into Strategic Planning Workspace, creating a gap between where they worked and where the platform was heading.

How you activate it

- Strategic Planning
- Portfolio Planning

Licensing

SPM Advanced and/or Prime

Who to target

Portfolio Managers
Program Manager

Technical

A new Programs L1 option added to SPW automatically generates a portfolio plan for each existing legacy program. Access is governed by existing SPW and program roles — no additional setup required. Capacity, financials, and a program status report follow in October.

Before / After

Before: Legacy program users had no access to Strategic Planning Workspace functionality and no structured way to transition their existing programs into the modern planning experience.

After: Existing legacy programs are accessible directly from SPW with a portfolio plan automatically created for each, giving program users immediate access to modern planning functionality without manual setup or migration effort.