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Xanadu Strategic Portfolio Management

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Strategic Portfolio Management

Align work with strategy to deliver products and services in a way that supports your business goals and priorities. ServiceNow® Strategic Portfolio Management (SPM) enables you to use digital transformation to drive more customer value faster. Plan, deliver, and track value across different methodologies.

https://player.vimeo.com/video/1172311283?h=67d26d03af&badge=0&autopause=0&player_id=0&app_id=58479

SPM helps you align work to strategy, enabling you to optimize business outcomes and respond rapidly to change so that you deliver more value, not just more output.

With Strategic Portfolio Management, gather critical business requirements, prioritize new requests, assess top-level investments, allocate resources, and adapt to changing business priorities by making adjustments on an ongoing basis. Manage strategic and operational work from one place while driving Agile transformation.



Migrate from Scaled Agile Framework to Enterprise Agile Planning

Enterprise Agile Planning helps streamline communication and collaboration between teams, and drive coordination with diverse teams using an intuitive workspace.



Manage all assigned tasks from one place with My Work

Manage all your work such as CWM tasks, project tasks, RIDAC items, and Agile stories from a centralized view in the Collaborative Work Management workspace.



Show or hide features of your portfolio plan

Show or hide the features of your portfolio plan in the Portfolio Planning Workspace or Strategic Planning Workspace so you share only the most important data with your stakeholders.



Update actuals easily using the enhanced target breakdowns interface

Update actuals and track the progress of your targets in daily, weekly, monthly, quarterly, or yearly intervals with the enhanced target breakdown feature.



Prioritize and roadmap high-level items in Portfolio Planning workspace

Use a top-down approach and plan for high-level items, programs, using the Project Program lens.



Export roadmap or free-form roadmap to a Microsoft PowerPoint file

Export the portfolio plan roadmap or free-form roadmap into a Microsoft PowerPoint file.

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Export the data of your goals and targets to a Microsoft Excel or CSV file

Export the data of your goals and targets from list view of the Goals page and to a Microsoft Excel or CSV file to share the data and collaborate with your business stakeholders.



Manage resource allocations and assignments

Manage resource assignment and allocations in Project Workspace.



Manage financials of sub-projects on parent project

View and manage the financial information such as cost plans and expense lines of sub-projects on the parent project.



Enable AI experience using Now Assist for Strategic Portfolio Management (SPM)

Use the Now Assist for SPM application to summarize, elaborate, or shorten the selected or complete content on Docs quickly. Track key elements such as milestones, resource assignments, projects, and project tasks using email project summary skill.



Gain enhanced visibility and actionable Insights with customizable status reports in Project Workspace

Utilize status reports to monitor project health, key metrics, risks, and milestones and keep you prepared to address project challenges promptly.

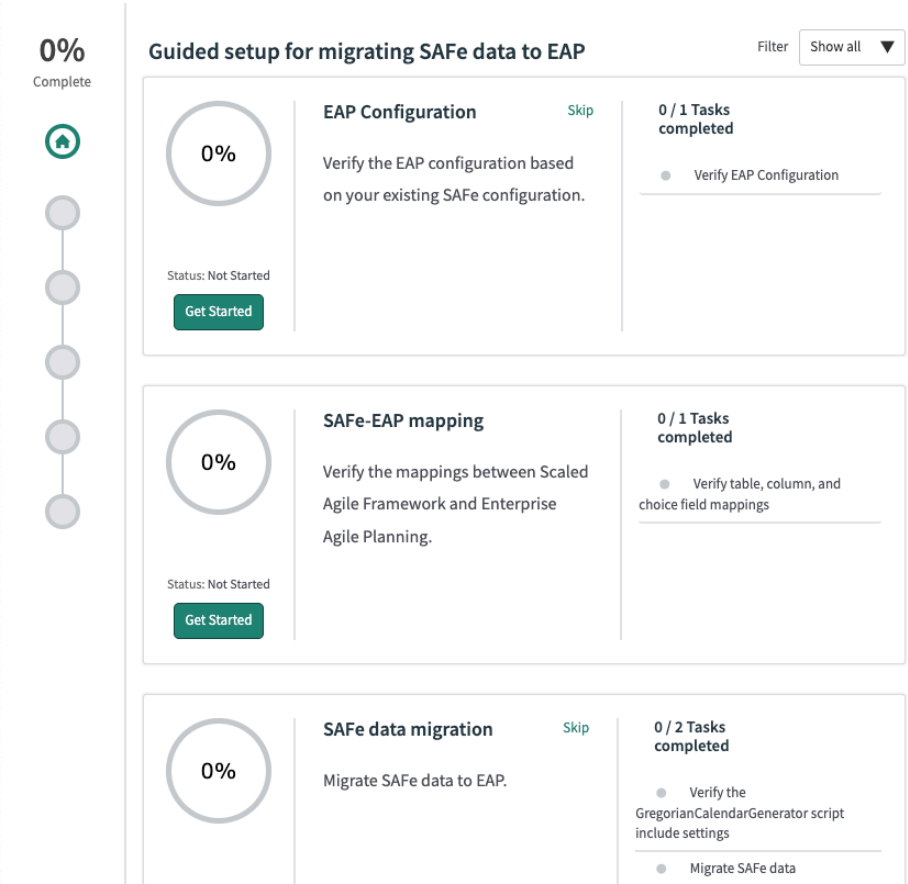


Optimize plans using scenario planning

Use scenario planning to simulate changes to the portfolio plan, compare scenarios for visualizing tradeoff decisions, and approve a scenario to revise the live plan making informed decisions.

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Migrate from Scaled Agile Framework to Enterprise Agile Planning



Migrate all data from the tables of Portfolio SAFe or Essential SAFe applications to EAP tables. Use the **SAFe Migration Guided Setup** module to help you with a step by step process for successful migration.

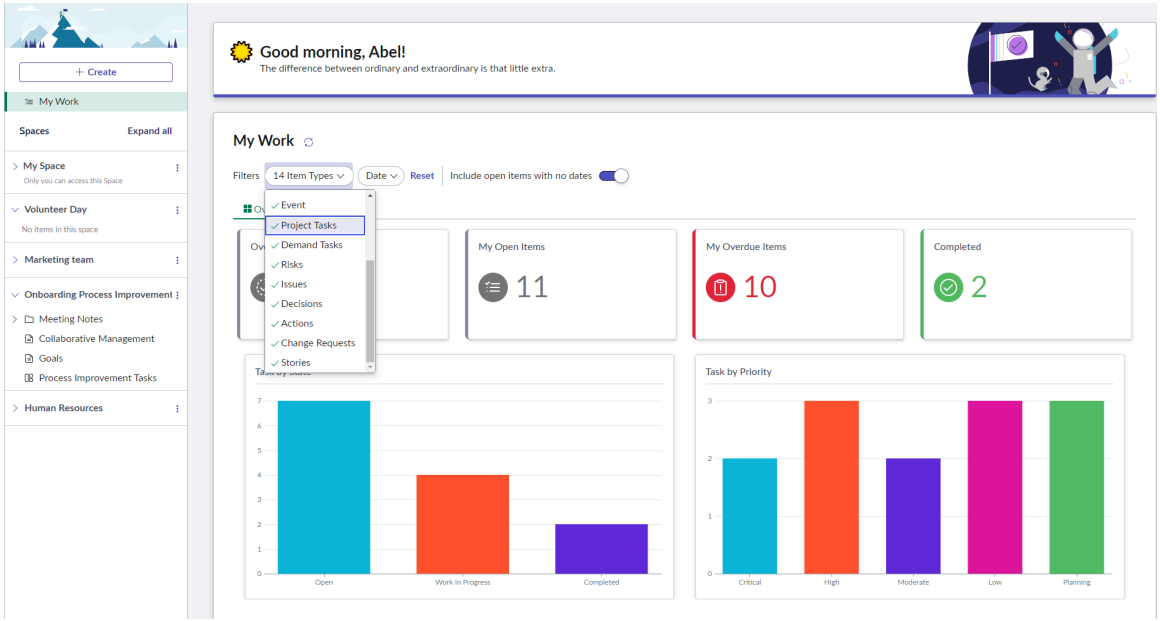
Important:

Starting with the Xanadu release, Portfolio SAFe, Essential SAFe, Performance Analytics Content Pack for Essential SAFe, Work Progress Status for SAFe, Agile - Scaled Agile Framework - Unified Backlog, and Read only roles for SAFe plugins are being prepared for future deprecation. These plugins will be hidden and can no longer be activated on new instances but will continue to be supported. Enterprise Agile Planning in Strategic Planning provides the latest experience for this functionality.

For more information on the deprecation process and its impact, see the Application/Plugin Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

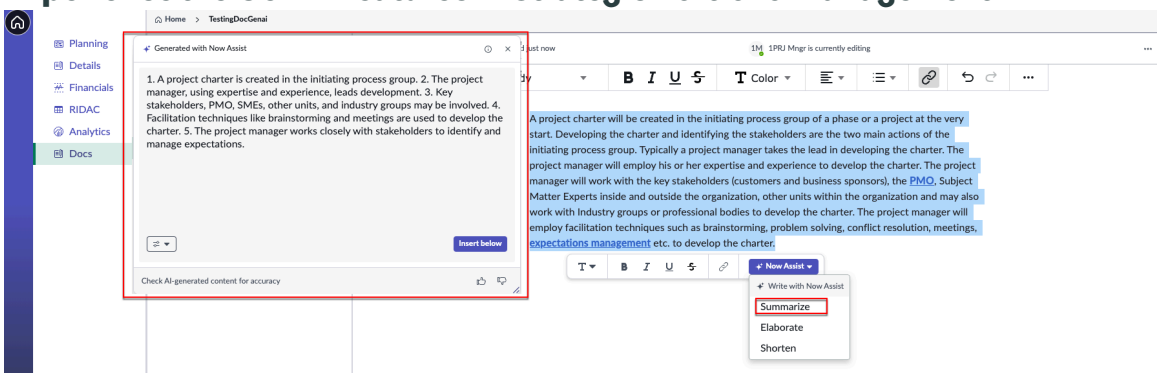
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Manage all assigned tasks from one place with My Work



My Work in CWM consolidates all tasks across CWM and Strategic Portfolio Management (SPM) workspaces, provides visualizations around work such as task grouping by state, priority, and key metrics such as open and overdue items.

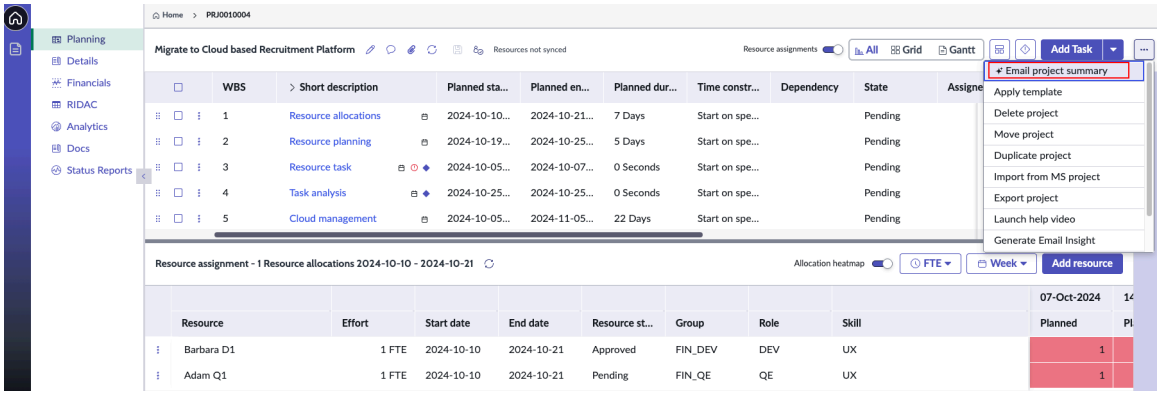
Experience the Gen AI features in Strategic Portfolio Management



Project Gen AI Docs (Project Workspace) or Planning item Gen AI Docs (Strategic Planning) or EAP Teams Gen AI Docs (Enterprise Agile Planning) skill: Summarize, elaborate, or shorten the selected or complete content on Docs to quickly understand the requirements or key information in documents using Now Assist.

Email project summary skill: Generate and share the project summary quickly with Project managers using Now Assist. You can monitor key elements such as milestones, resource assignments, projects, and project tasks of your projects.

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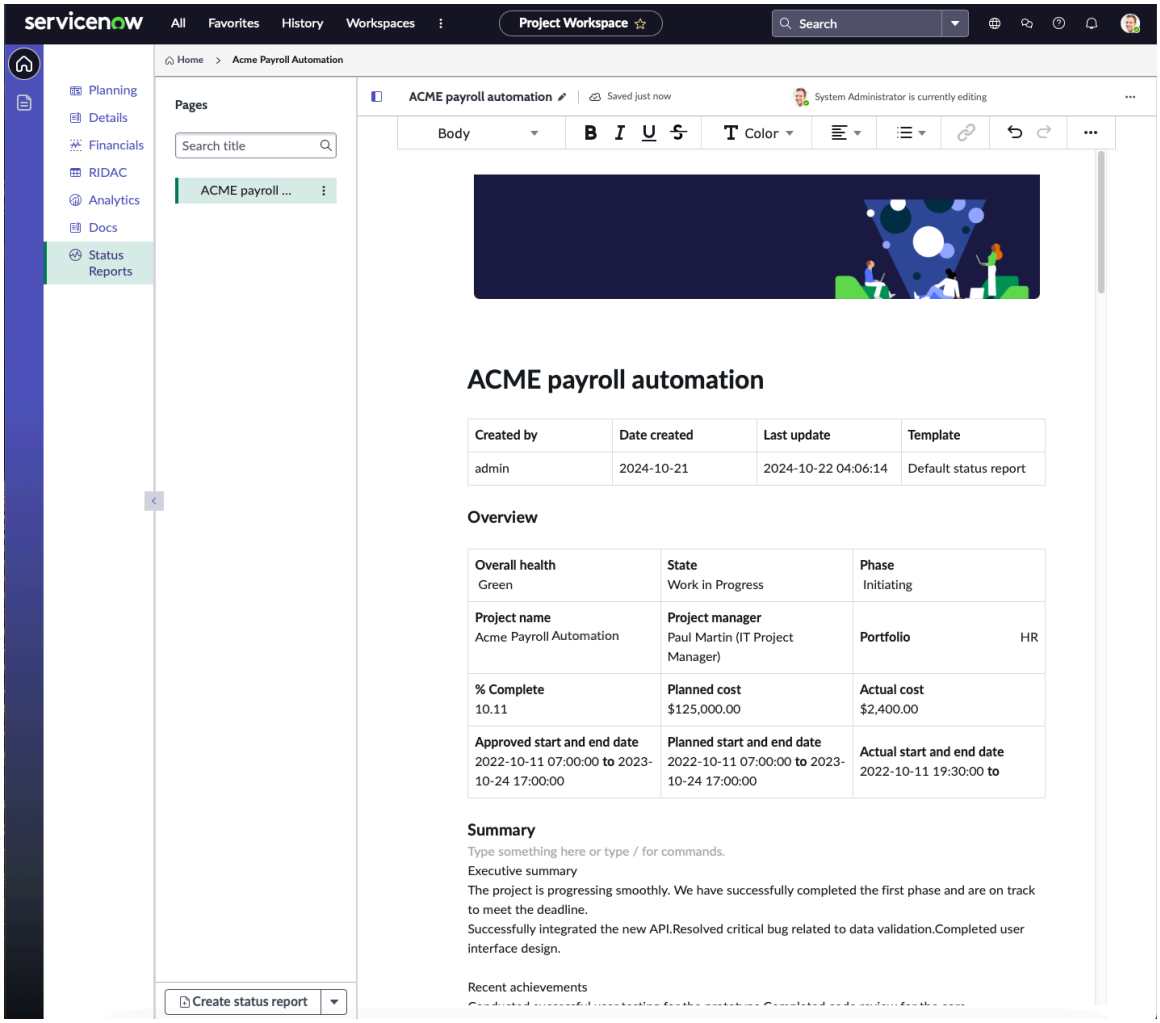


Gain enhanced visibility and actionable Insights with customizable status reports in Project Workspace

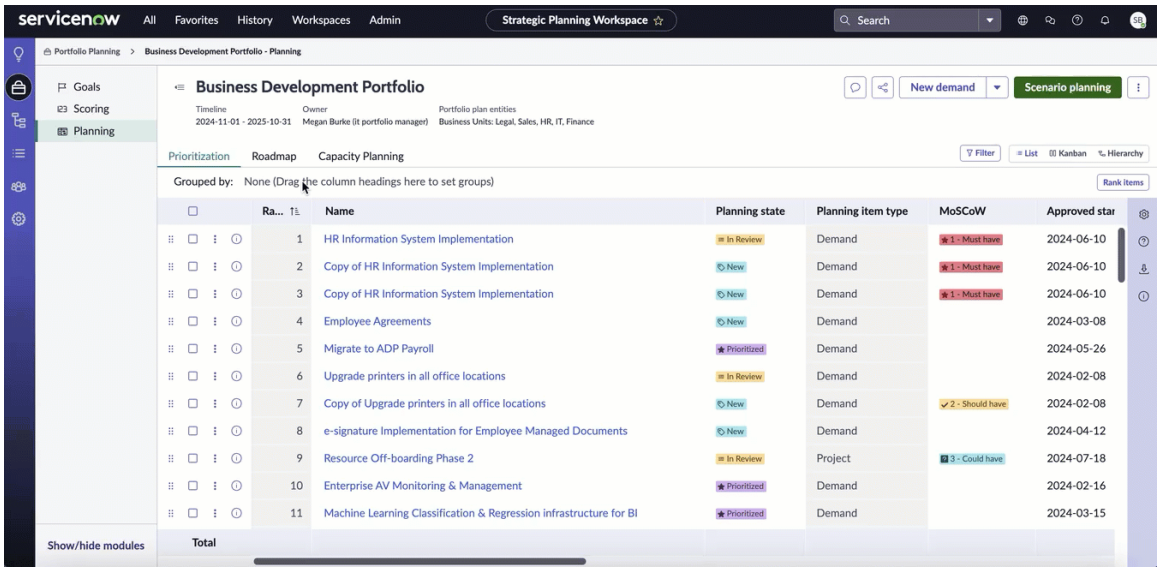
Project Workspace offers powerful and flexible status reporting that empowers teams to monitor project health, key metrics, risks, issues, and milestones—all in one place. Status reports provide a fully customizable and configurable view of the current project state, displaying essential metrics such as overall health, schedule, scope, cost, and resource utilization. Wit status reports, project teams and stakeholders stay aligned, informed, and prepared to address any project-related challenges in a timely manner. Project managers can either create and configure their own status reports or can use one of the two base system templates:

- One Page Status Report: This template provides a concise one-page summary of key project metrics, making it ideal for quick updates where a high-level overview is sufficient.
- Default Status Report: This template includes a more comprehensive range of data points, covering areas such as milestones, risks, issues, decisions, and change requests. It offers a detailed view of the project's progress and status, similar to a classic status report.

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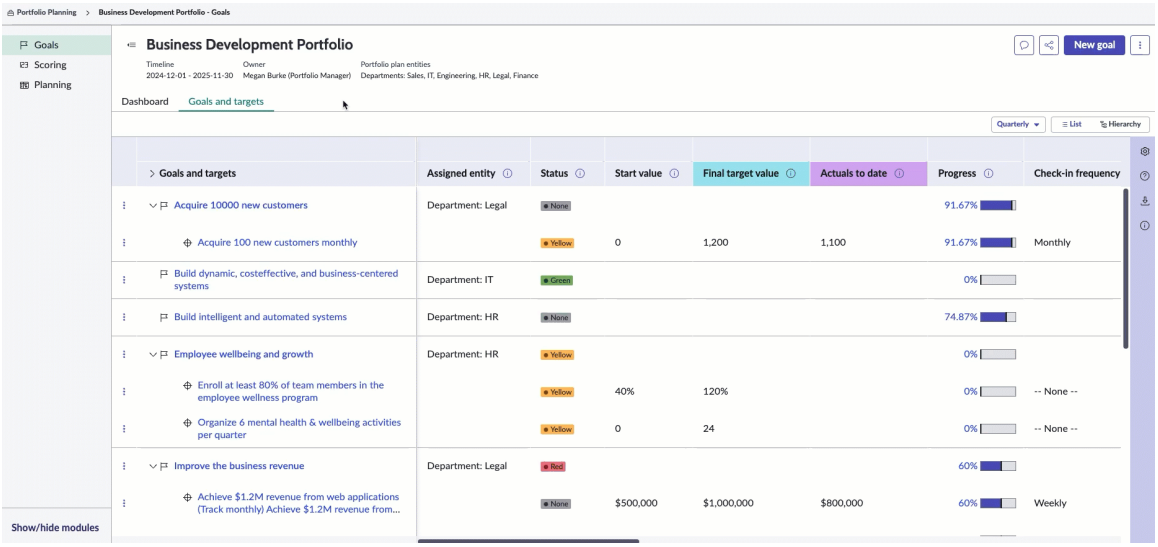
Show or hide features of your portfolio plan



As a portfolio manager, show or hide the features, such as Goals, Scoring, Prioritization, and Roadmap, of your portfolio plan in the Strategic Planning Workspace. This capability helps you share only the portfolio plan data that matters to your stakeholders and restrict access to the other data.

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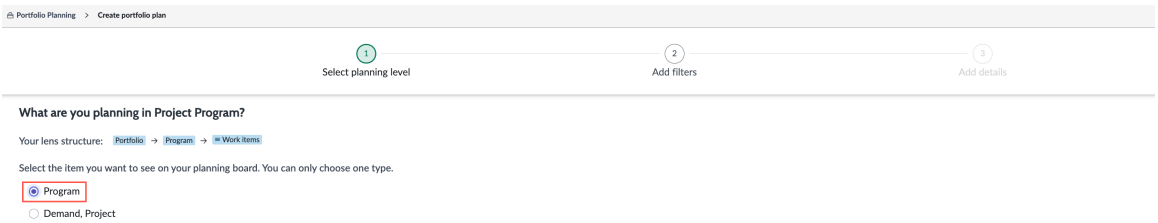
Update actuals easily using the enhanced target breakdowns interface



Use the enhanced UI to update the actuals for a target in the Strategic Planning Workspace.

- Create daily, weekly, monthly, or yearly target breakdowns according to how often you want to update and track the progress of the target. The target breakdowns are created based on the value selected in the **Check-in frequency** field.
- In the **Progress** tab of the target's side panel, view the trend of the target's progress in a line or bar graph. You can also edit the planned target and view the check-in history of the target actuals.

Prioritize and roadmap high-level items in Portfolio Planning workspace

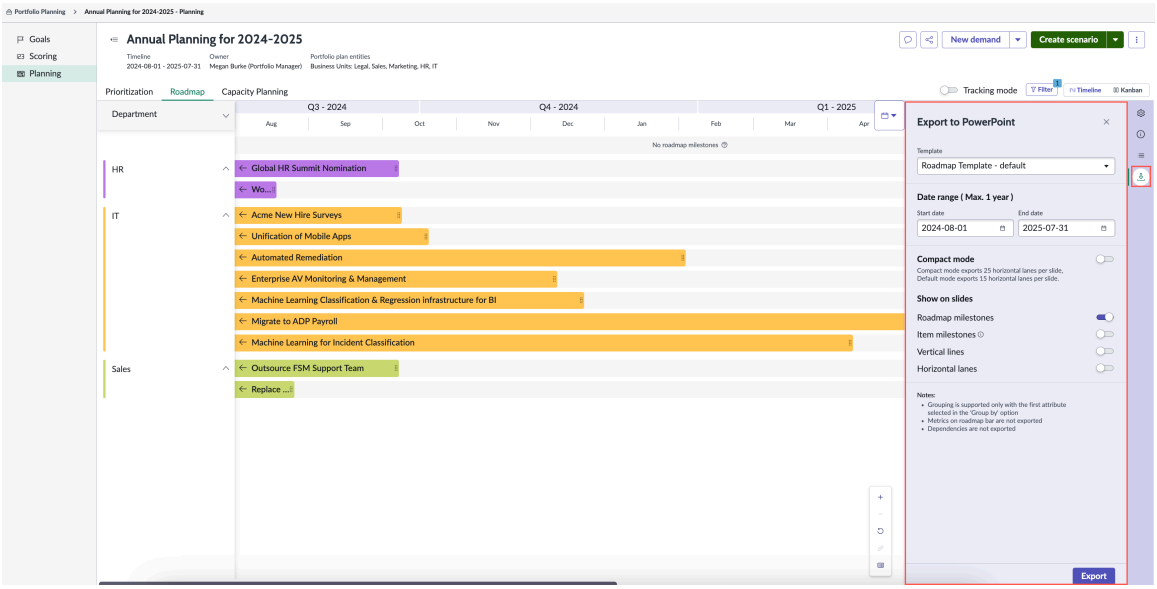


Enable higher-level planning personas, such as EPMOs and product leaders, to prioritize and plan high-level items, programs, instead of a bottom-up approach focused on specific work items .

For example, if you are department head, you can build a portfolio plan for your department's programs. Review the programs using the List view, drill down into the projects and demands associated to these programs in a Hierarchy view, and track the progress of these programs using the portfolio roadmap.

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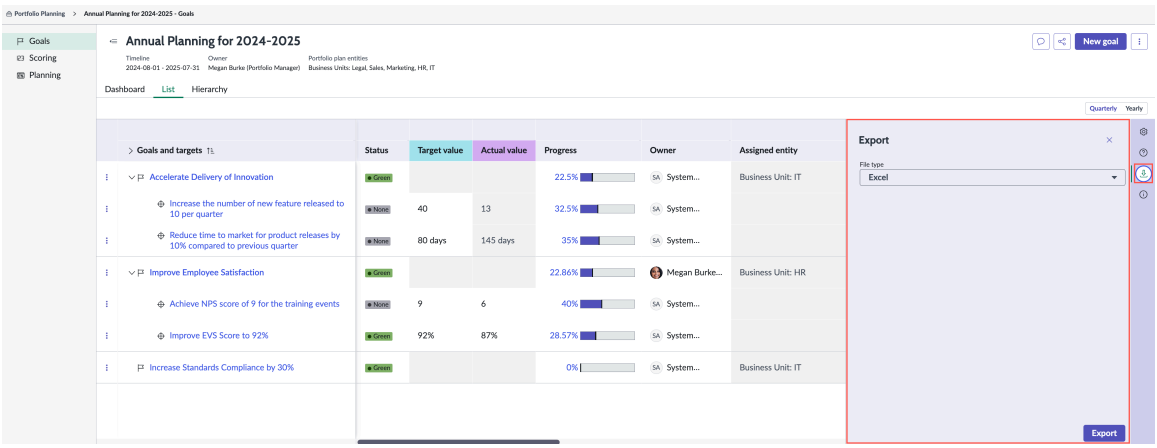
Export roadmap or free-form roadmap to a Microsoft PowerPoint file



Export the portfolio plan roadmap or free-form roadmap into a Microsoft PowerPoint file so that you can keep your business stakeholders updated on the progress. Save time by avoiding copying data into reports and drive shared outcomes by enabling collaboration even with stakeholders who can't access your ServiceNow instance.

You can export roadmap or free-form roadmap to the predefined Microsoft PowerPoint template or you can also create your own branded template and then export.

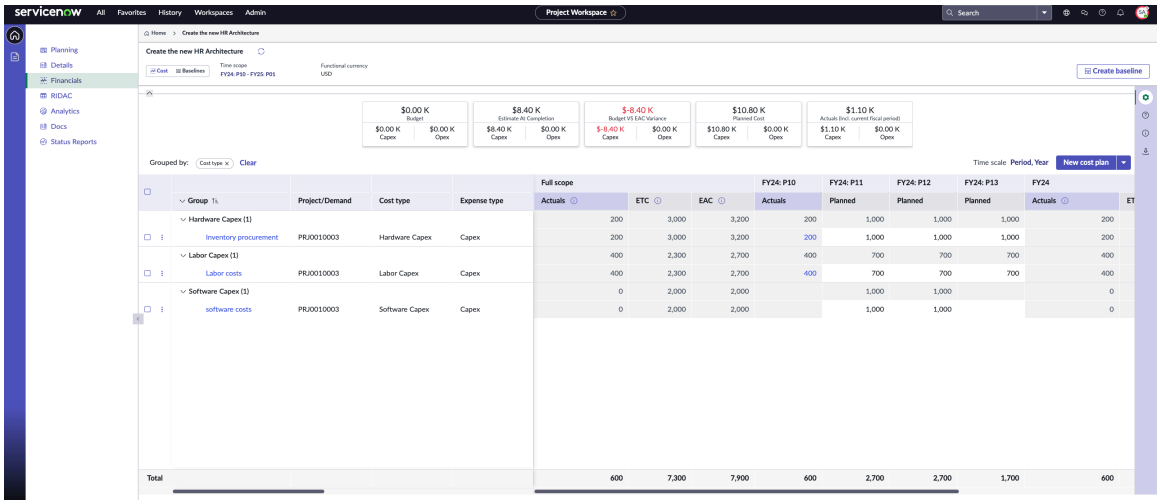
Export the data of your goals and targets to a Microsoft Excel or CSV file



Export the data of your goals and targets from list view of the Goals page and to a Microsoft Excel or CSV file to share the data and collaborate with your business stakeholders.

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Manage financials of sub-projects on parent project

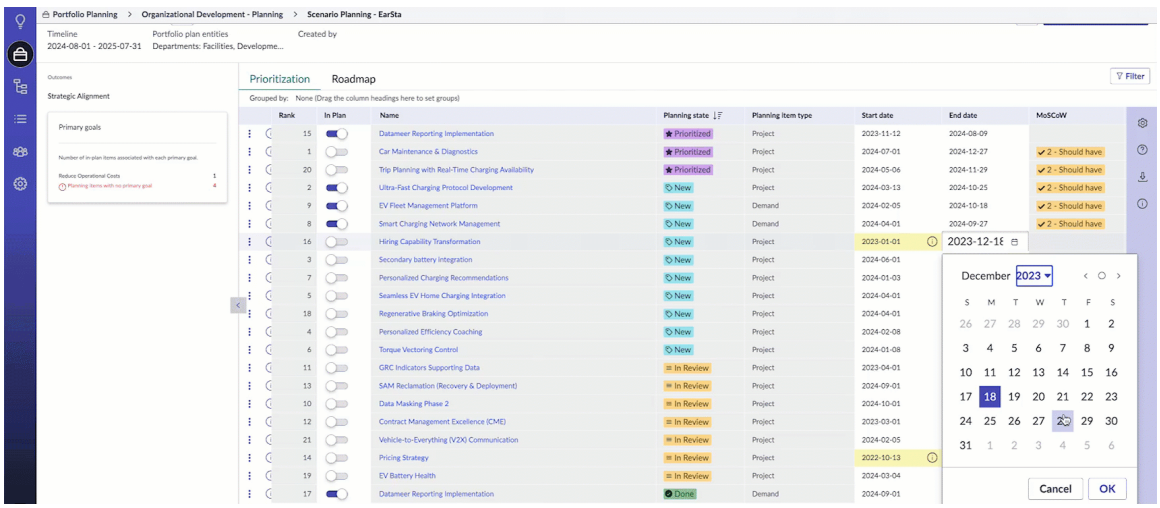


View and manage the cost plans and expense lines of sub-projects on parent projects. Create a baseline on the parent project to fetch the financial performance of sub-projects to track the expenses and re-forecast the cost plan to use the budget efficiently.

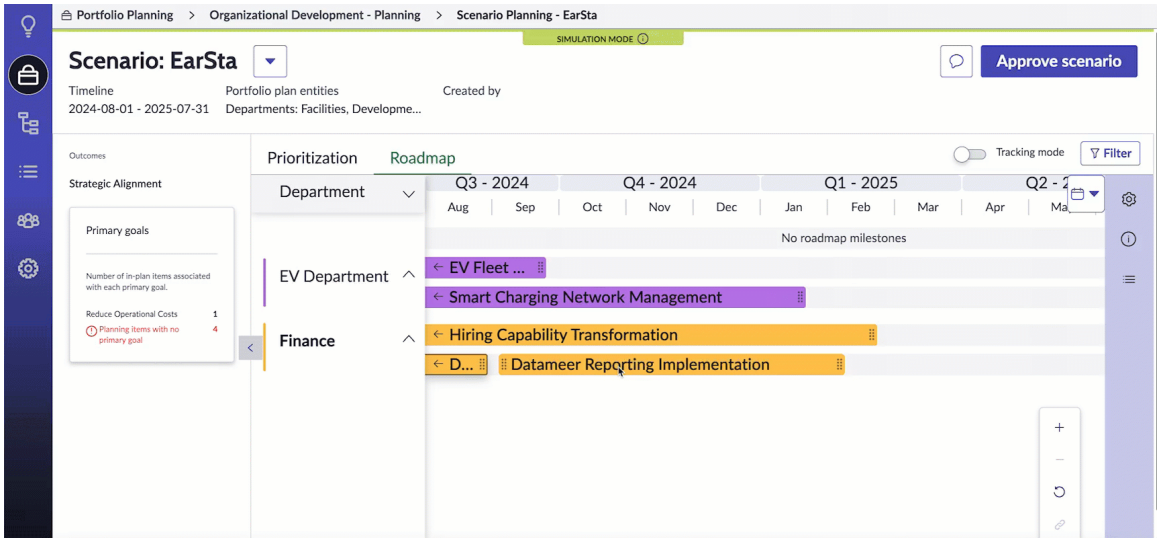
Optimize resource allocations and assignments

Assign users or groups according to the selected effort type when creating a resource assignment. Align resource allocations with the selected effort type. Use the assigned schedule for resource allocation when a resource has a schedule. Update to the resource assignment also modifies the resource assignment status. View actuals for each resource from resource allocation window.

Optimize plans using scenario planning



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Use scenario planning to simulate changes to the portfolio plan and approve the best scenario to revise the live plan making informed decisions.

- Create scenarios in a simulated environment and adjust the prioritization and timelines of planning items.
- Visualize the differences between goal alignment and trade-off decisions between scenarios by comparing scenarios side by side.
- Approve the best scenario as the live portfolio plan for execution and making informed decisions.

Organization Extension (com.snc.organization_extension) plugin

Organization Extension (com.snc.organization_extension) plugin activates Goals, Business unit, Enterprise strategy, and Business unit strategy entities. It is available on zBoot to all customers with demo data.

Business Units, Goals, Enterprise Strategy, and Business Unit Strategy modules are available in the Organization application menu.

Business Applications and Business Capabilities modules are also available within the Organization application menu, however, their related tables are moved to Configuration Management (CMDB) (com.snc.cmdb) plugin, which is available on zBoot but without demo data.

Learn

- What is Gantt chart?
- What is Agile?
- What is a key performance indicator (KPI)?
- What is a work breakdown structure (WBS)?
- What is Project Portfolio Management (PPM)?
- What is value stream mapping (VSM)?
- What is Agile?
- What is Agile project management?
- What is digital transformation?
- What is resource management?

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- What is strategic portfolio management?
- What is the difference between Agile vs. Waterfall?

Get started

- Understand how to deliver business outcomes with speed and agility using ServiceNow SPM. For more information, see Customer Success Center.
- Learn how to align execution with business goals and priorities. For more information, see Strategic Planning.
- Create goals, set targets for them, and evaluate the progress of your goals and targets to accomplish the organizational plans and drive business outcomes. For more information, see Goal Framework and Goal Framework for SPM.
- Enhance your SPM capabilities with specialized plugins that provide read-only roles for various modules, confirming secure access to dashboards and reports.

Applications and features

- Collaborative Work Management
- Portfolio Planning
- Strategic Planning
- Now Assist for Strategic Portfolio Management (SPM)
- Goal Framework and Goal Framework for SPM
- Project Portfolio Management
- Project Workspace
- Resource Management Workspace
- Export to PowerPoint for Strategic Portfolio Management
- Innovation Management
- Time Card Management
- Agile Development 2.0
- Scaled Agile Framework (SAFe)
- SPM Benchmarks
- Microsoft Azure DevOps Integration for Agile Development
- Atlassian Jira Integration for Agile Development
- Test Management applications
- Cost Management
- Data Separation

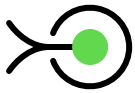
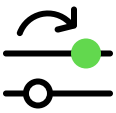
Portfolio Planning

Enhance your traditional product and portfolio management by prioritizing work and visualizing plans with ServiceNow® Portfolio Planning (formerly known as Alignment Planner Workspace). Effectively plan, track, and manage work for projects and demands using a centralized workspace.

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Portfolio Planning is available for users with a Strategic Portfolio Management (SPM) Standard license.

Get started

Explore  Learn the key features and value that Portfolio Planning offers your business	Configure  Set up the core configuration	Use  Learn how to plan and align work across your portfolios
Prioritize  Rank and prioritize work for your portfolio plans	Roadmap  Roadmap work for your portfolio plan	Report  Export portfolio plan and roadmap status report as a PPT
Integrate  Integrate Portfolio Planning with Project Portfolio Management	Compare  Compare capabilities of Portfolio Planning with Strategic Planning	Reference  Get details about components and domain separation

Troubleshoot and get help

- Ask or answer questions in the Strategic Portfolio Management forum on the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

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Exploring Portfolio Planning

Prioritize, roadmap, and track the work planned for your products and portfolios using Portfolio Planning. Enhance management of your traditional project and product delivery approach.

Portfolio Planning overview

Portfolio Planning helps you plan work for your products and portfolios in the desired delivery perspective. Cascade the plans from the enterprise level down through portfolios and products or plan work to align with your business objectives.

With lens in Portfolio Planning, you can flexibly switch between planning perspectives and create personalized plans to achieve focused planning for your products and portfolios. From the work associated to these portfolio plans, prioritize and roadmap relevant work, thus aligning the right execution teams to the right strategy.



Comparing Portfolio Planning Workspace with Strategic Planning Workspace

- Portfolio Planning Workspace: Prioritize, roadmap, and track work when using waterfall methodology. Enhance traditional portfolio planning for demand and project management.
- Strategic Planning Workspace: Prioritize, roadmap, and track work when using traditional, agile, or hybrid methodologies. Align strategy to execution by defining and tracking goals across the organization. To learn more about Strategic Planning, see Strategic Planning.

Feature	Portfolio Planning Workspace	Strategic Planning Workspace
Pre-defined lens: Project Portfolio	✓	✓
Pre-defined lens: Organization	✓	✓
Pre-defined lens: Project Program	✓	✓
Pre-defined lens: Product	✗	✓

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Feature	Portfolio Planning Workspace	Strategic Planning Workspace
Pre-defined lens: Strategic Investments	✗	✓
Pre-defined lens: Goals	✗	✓
Pre-defined lens: Value Stream	✗	✓
Pre-defined lens: Business Capability	✗	✓
Lens configuration: Modify existing lens	✓	✓
Lens configuration: Create new lens	✗	✓
Portfolio plans: Create and share	✓	✓
Planning items: Supported planning items	Project, Demand	Project, Demand, Epic, Custom
Supported items for high-level planning	Program (pm_program)	Strategic Program, Initiative, Custom
Planning items: Custom planning item tables	✗	Five predefined tables
Prioritization: List	✓	✓
Prioritization: Hierarchy	✓	✓
Prioritization: Kanban	✗	✓
Roadmaps: Timeline	✓	✓
Roadmaps: Kanban	✗	✓
Scenario planning	✓	✓
Scoring	✗	✓
Goals	✗	✓
Product Feedback	✗	✓
Capacity planning	✓	✓
Financials	✓	✓
Create and share free-form roadmaps	Project, Demand, and Program tables	Any ServiceNow® platform entity
Enterprise Agile Planning	✗	✓
Dashboards	✓	✓

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Learn about different features of Portfolio Planning in detail from the following sections.

Lenses in Portfolio Planning

Flexibly switch planning perspectives to prioritize, roadmap, and view the alignment of work using personalized portfolio plans. Improve enterprise planning by discovering planning insights that drive shared outcomes.

Lenses

Lens in Portfolio Planning indicate a perspective by which you can prioritize and plan your work. Lens and its structure represent the way that different planning managers choose to prioritize, fund, and plan work. For example, depending on your role, you can plan work from the perspective of a delivery organization, strategic investment, product, and others.

Pre-defined lenses and their structure

Portfolio Planning provides two pre-defined lenses to get you started with building your portfolio plans - Organization and Project Portfolio.

Planning managers can use these lenses based on their role at the company. Each lens includes multiple levels, that the personas can plan at, and together these levels form the structure for that lens.

Lens	Planning levels	Planning manager	Description
Organization	• Company • Business unit • Department	• Department head • Business unit head	Visualize how work is aligned to company's objectives
Project Portfolio	Portfolio	• Product manager • Portfolio manager	Visualize how work is aligned to portfolios across the company
Project Program	• Portfolio • Program	• Portfolio manager • Program manager	Plan, prioritize, and roadmap the work in your programs.

You can work with your administrator to modify the structure for these pre-defined lenses. For more information, see Configuring lens in Portfolio Planning.

Start creating portfolio plans to improve the alignment of your work with the business strategy. See Create a portfolio plan.

Portfolio plans in Portfolio Planning

Personalized portfolio plans help you align work with your company's objectives and roadmap the right work for the right time.

Portfolio plans overview

Portfolio plans are custom plans per planning manager that are built using a lens. A portfolio manager can use the Project Portfolio lens to plan in the perspective of portfolios, and a department head can use the Organization lens to plan in the perspective of a department.

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As a planning manager, you can create multiple portfolio plans using different lenses. Visualize the plans and progress of work from different perspectives and share them with stakeholders.

Using portfolio plans, you can:

- Enable focused planning of work in the desired perspective (lens).
- Prioritize and roadmap the right work to ensure alignment with the company's objectives.
- Reduce the time spent on aligning execution teams to the right work.

High-level planning using portfolio plans

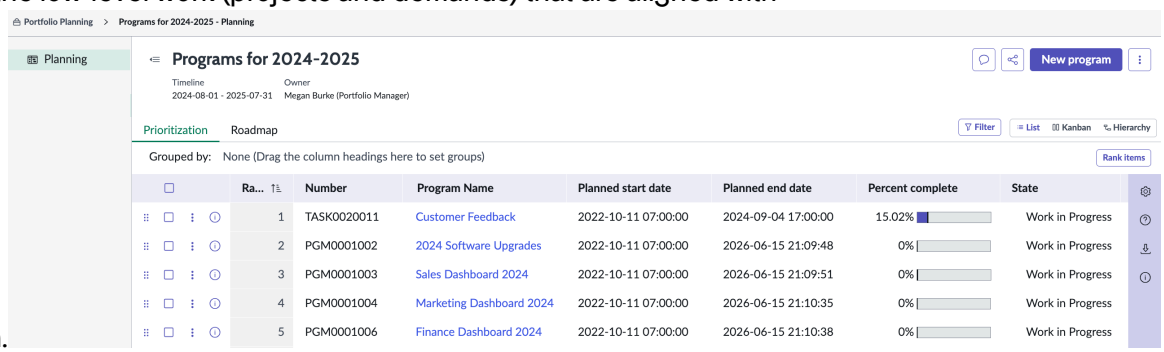
In Portfolio Planning, you can prioritize and roadmap programs (pm_program) for your organization by building high-level portfolio plans. High-level planning items usually span across multiple business units, departments, or portfolios of a company. These high-level planning items help you further breakdown a company's priorities and achieve specific milestones and outcomes.

Using the Hierarchy view, review the work pipeline and drill down to the low-level planning items that are associated with your programs.

For example, as an EPMO, you can view the epics associated with each program.

You can use Programs (pm_program) from the Project Program lens to create high-level portfolio plans. See Create a high-level portfolio plan.

Here's a sample portfolio plan that shows a few programs of the company and the low-level work (projects and demands) that are aligned with them.



Start creating portfolio plans to align work with your company's objectives. See Managing portfolio plans in Portfolio Planning.

Work prioritization in Portfolio Planning

Prioritize work that is relevant for your portfolio using a centralized Workspace in Portfolio Planning. Review and determine the right work to invest in.

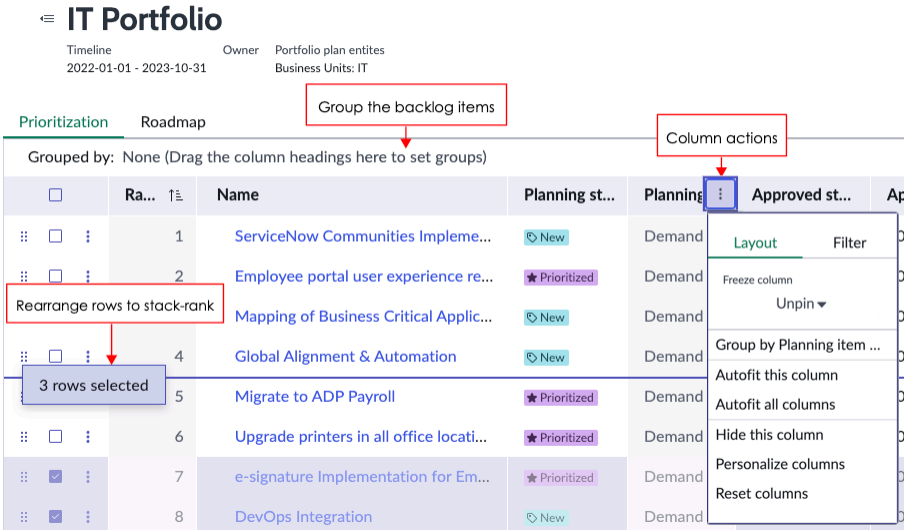
Before scheduling the roadmap for your portfolio plan, it's helpful to first know the existing and upcoming workload. Having all the work items listed at one place helps you understand the overall work pipeline. The consolidated view enables smoother backlog grooming so that you easily review and decide which items must be prioritized.

Using the Prioritization tab in the workspace, you can review all the new and existing work for your portfolio plan, representing its backlog. To help you review the workload efficiently, Prioritization provides information for each work item such as the associated goal, planned costs, and planned benefits. Using these data points, you can stack-rank the items and decide which items are to be prioritized over the others. The Prioritization tab provides the following views to review and manage your backlog.

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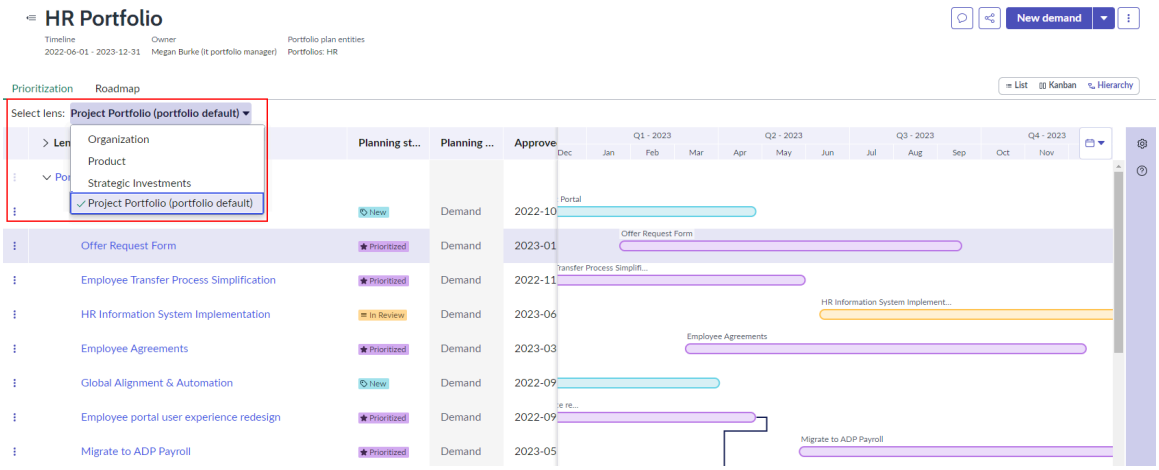
List view

Planning items are listed in a grid format. You can stack-rank the items, group them by a desired attribute, and sort them based on their priority by using the drag functionality.



Hierarchy view

This view displays how work in the current portfolio plan is aligned with respect to entities of other lenses. Using the lens switcher, you can change the perspective in which you view the alignment of the work. Using the timeline section of the view, prioritize work effectively by gaining visibility into the schedule and dependencies between the planning items.



For example, as a portfolio manager, you can view the projects and demands created for your portfolio all in one place, as your portfolio's backlog. If your portfolio must take up a new project, you can add it to this backlog directly. These items are marked as **New** for easy identification. If you are in discussion over certain items with your stakeholders, mark them as **In Review** until you decide on its priority. After you decide which items are ready to be worked on, mark them as **Prioritized** and they would be added to your portfolio roadmap. If you don't want to pursue a project or a demand, mark it **Cancelled**.

To get started with managing your work pipeline in Portfolio Planning, see Prioritizing portfolio plan work in Portfolio Planning.

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Roadmaps in Portfolio Planning

Effectively plan work for your company using visual roadmaps in Portfolio Planning Workspace.

As your organization grows and priorities change, it's important to have the flexibility of changing existing plans and making new plans with ease. Using roadmaps, you can create a layout of current and upcoming plans while aligning them with your business objectives. Share these visual plans with other stakeholders across the organization, drive meaningful conversations, and validate common understandings.

Each roadmap is a high-level block of work, prioritized by different planning personas such as enterprise project managers, portfolio managers, project managers, or others. Roadmaps also provide insights to the stakeholders while guiding the delivery teams during development.

The following are the types of roadmaps that you can work with:

- Portfolio plan roadmaps
- Free-form roadmaps

The features available in these roadmaps are:

- Hybrid roadmaps
- Roadmap-level milestones
- Planning item-level milestones
- Planning item dependencies
- Tracking mode

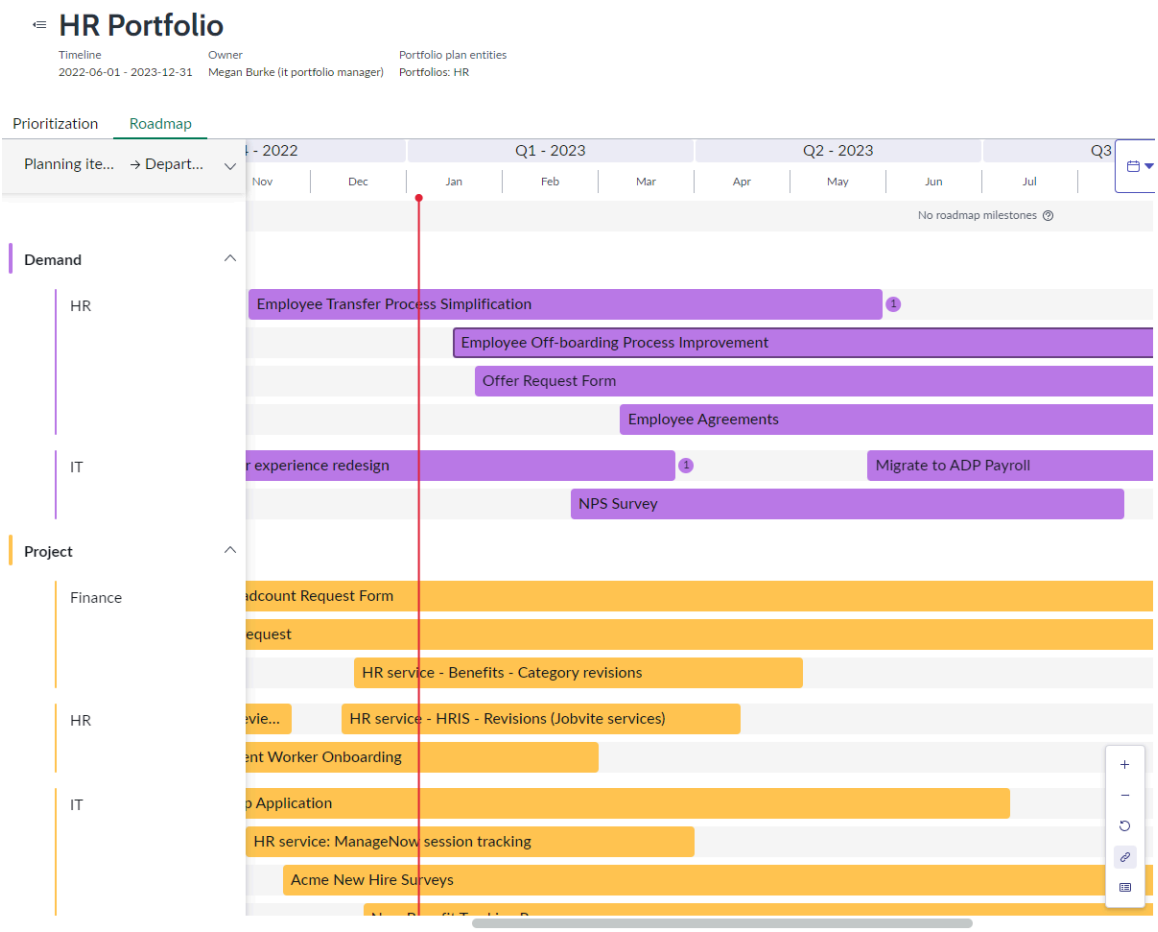
Note:
Roadmaps are available with Portfolio Planning by default. Roadmap Planning (sn_roadmap_plng) is no longer available to install as a separate application.

Portfolio plan roadmaps

By creating a flexible portfolio plan using lenses, you can prioritize and roadmap work for your portfolio. Use these portfolio roadmaps to plan and track work in different perspectives of the organization separately, while connecting them to the high-level plans of the company.

Create a portfolio plan to get started.

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Free-form roadmaps

Free-form roadmaps provide you the flexibility of planning and tracking work from different units of your company, such as work across multiple portfolios.

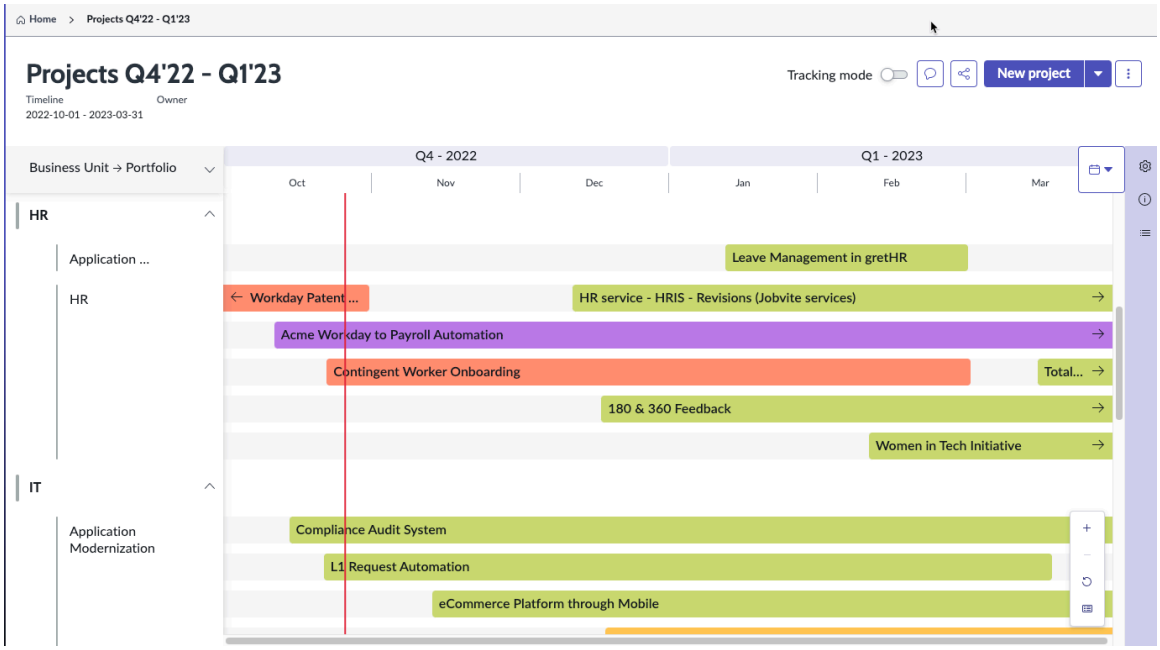
Using a filter condition, you can define what kind of work items you want on your roadmap. If you want to have a roadmap dedicated to just the projects of your department, define a roadmap for projects to start tracking the progress of current projects and create plans for new ones. See Create free-form roadmap in Portfolio Planning Workspace.

Free-form roadmaps provide you the flexibility of planning and tracking work from different units of your company, such as work across multiple portfolios.

Using a filter condition, you can define what kind of work items you want on your roadmap. If you want to have a roadmap dedicated to just the projects of your department, define a roadmap for projects to start tracking the progress of current projects and create plans for new ones.

See Create free-form roadmap in Portfolio Planning Workspace.

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Hybrid roadmaps

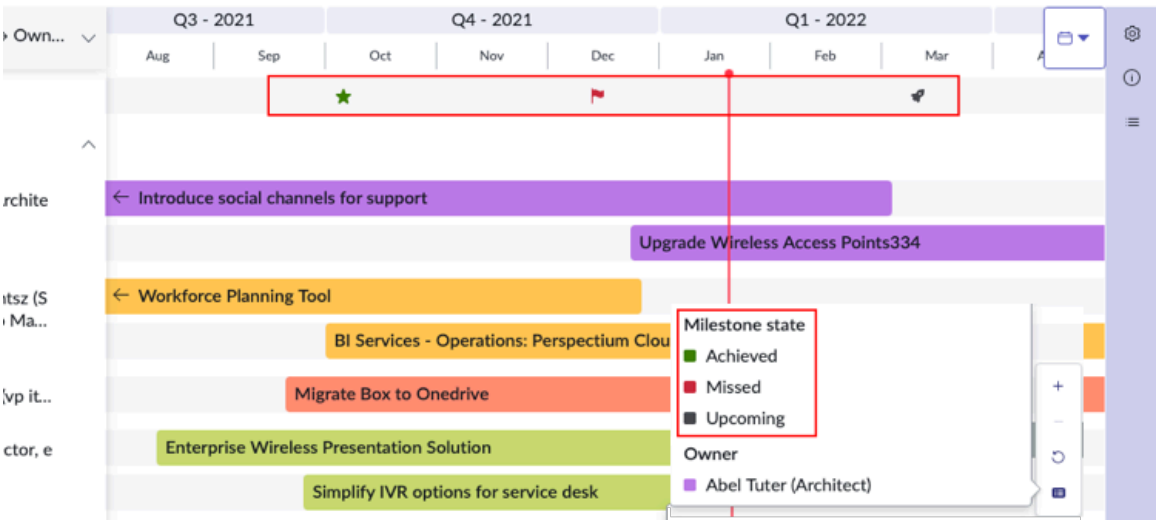
In Portfolio Planning, with both the portfolio roadmaps and free-form roadmaps, you can build hybrid roadmaps. For example, you can have a combination of projects and demands in a single view.

Milestones on the roadmap

You can create milestones for your roadmap, or for each planning item on the roadmap.

Roadmap-level or portfolio-level milestones

The milestones created at the roadmap level can help with tracking launch dates or key events during that roadmap's timeline. To learn how to create roadmap milestones, see Add milestones for roadmap in Portfolio Planning Workspace.



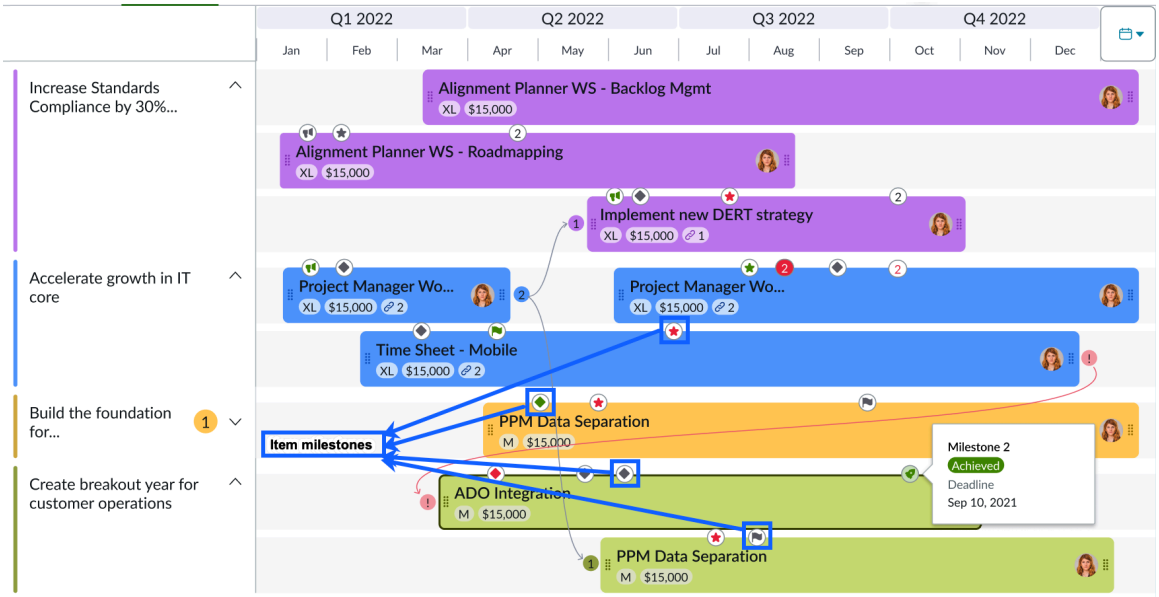
Planning item milestones

Using the milestones created at the item level, you can focus better on strategic outcomes. These milestones help with tracking deadlines or other important dates. You can access milestones on projects and demands.

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You can create and update milestones for all types of planning items from the roadmap, but the project milestones are read-only. As any changes to project milestones may impact the associated project plans, it is recommended to create or update project milestones using Project Workspace in Project Portfolio Management (PPM).

To learn how to create item-level milestones on a roadmap, see Add milestones for roadmap items in Portfolio Planning Workspace.



Planning item dependencies

While planning, it is essential to know how your planning items are connected with each other. Unless you know the dependency for each item, you might miss prioritizing time-critical projects or demands. This lack of information may also put you at risk of not scheduling the right work for the right time period.

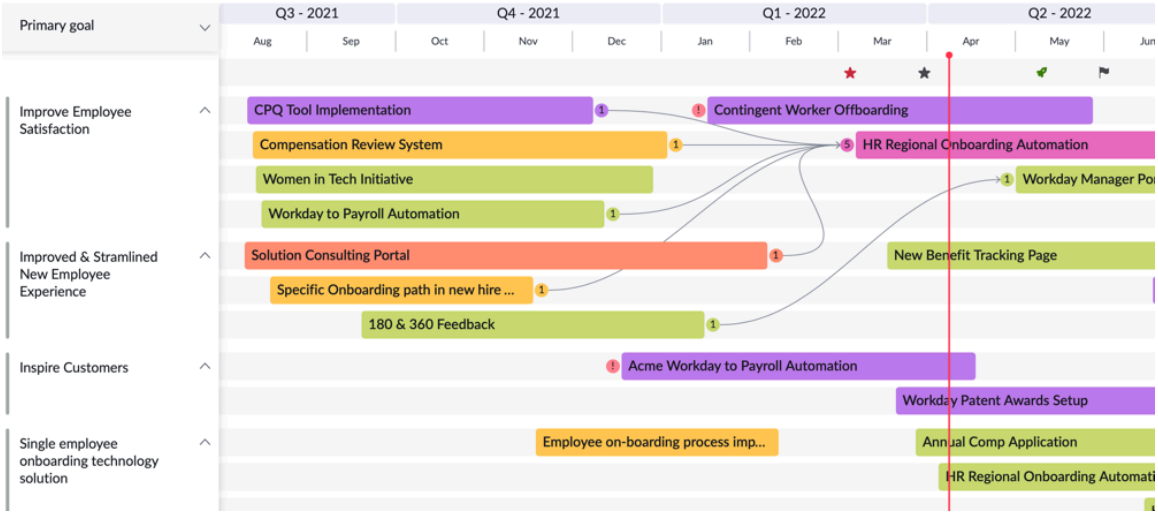
Dependencies on the roadmap help you visualize these relationships between the planning items, so that you can adjust their scheduling accordingly.

In Portfolio Planning, you can create simple or hybrid dependencies. For example, you can establish dependencies between two projects or between a project and an epic. Also, planning items can have dependency on items within the same portfolio plan or on items that aren't planned yet.

The dependency lines help you easily identify the items that may have to be prioritized together. Such easy identification of relationships between planning items provides better collaboration and facilitates enhanced decision making in the planning process.

To learn about creating and managing dependencies, see Add dependencies for roadmap items in Portfolio Planning Workspace.

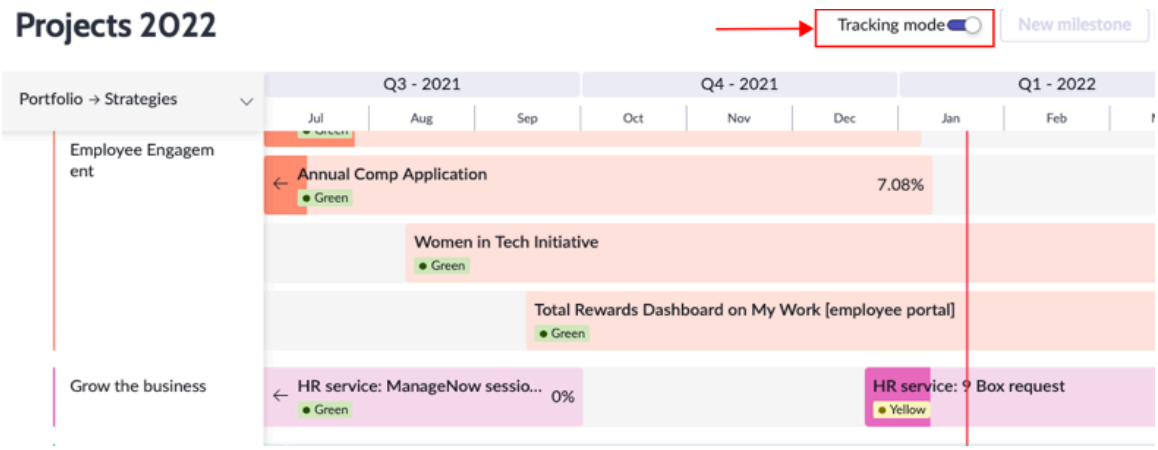
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Tracking mode in roadmaps

Track status, progress, and metrics for each item on the roadmap. Using the status indicators and the percentage complete score on the planning item bars, make informed decisions ahead of time and easily communicate your work progress to the stakeholders.

See Track roadmap item progress in Portfolio Planning Workspace.



Scenario planning in Portfolio Planning

Create and evaluate strategic scenarios to explore different planning approaches. Approve the optimal scenario that aligns with the organizational goals and strategic priorities.

Scenario planning overview

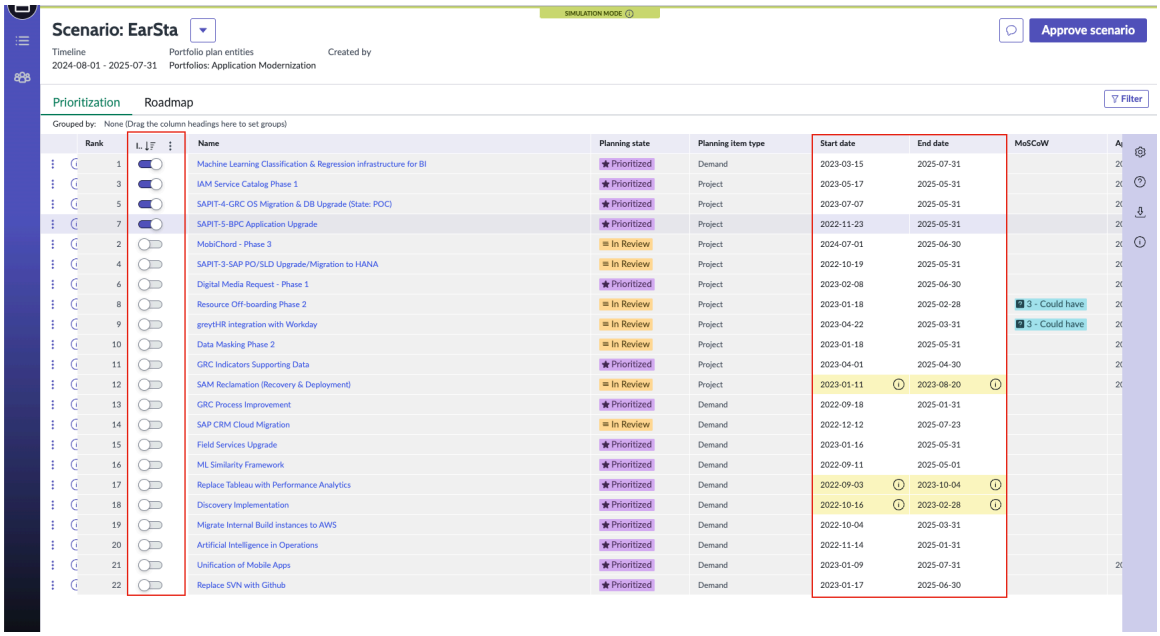
Scenario planning in Portfolio Planning enables organizations to create, evaluate, and approve the best strategic scenario that aligns with their strategic goals and intended business outcomes. This process helps in visualizing different approaches, assessing their impacts, and making informed decisions before implementing the live plan. By using scenario planning, organizations can anticipate potential challenges. Scenario planning overview

What is a scenario

A scenario in Portfolio Planning is a simulated version of a plan that enables you to explore a strategic approach without affecting the live plan. It provides a safe environment to prioritize items, adjust timelines, and evaluate the potential impacts of each approach.

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As compared to a plan, a scenario additionally has the following:



- **In Plan** toggle: The **In Plan** toggle enables you to prioritize or de-prioritize the planning items in the scenario you're creating. By default, when you create a scenario, the **In Plan** toggle is turned on for planning items that have all of the following field values:
  - Planning state as Prioritized or Done
  - Start and end dates within the portfolio plan dates.
- **Date** fields: The **Start date** and **End date** fields for the scenario are automatically populated based on either the planned or actual start and end dates of the planning items. You can update these dates during the scenario planning process. Once the scenario is approved, the updated dates are recorded as the approved dates for the planning items. If the updated dates fall outside the acceptable range, they're highlighted in yellow.

For more information on portfolio plans, see Portfolio plans in Portfolio Planning.

By comparing scenarios side by side, you can assess the differences in goal alignment and trade-offs between each scenario. This comparative analysis helps identify the scenario that best meets strategic objectives. For more information on comparing the scenarios, see Compare scenarios in Portfolio Planning.

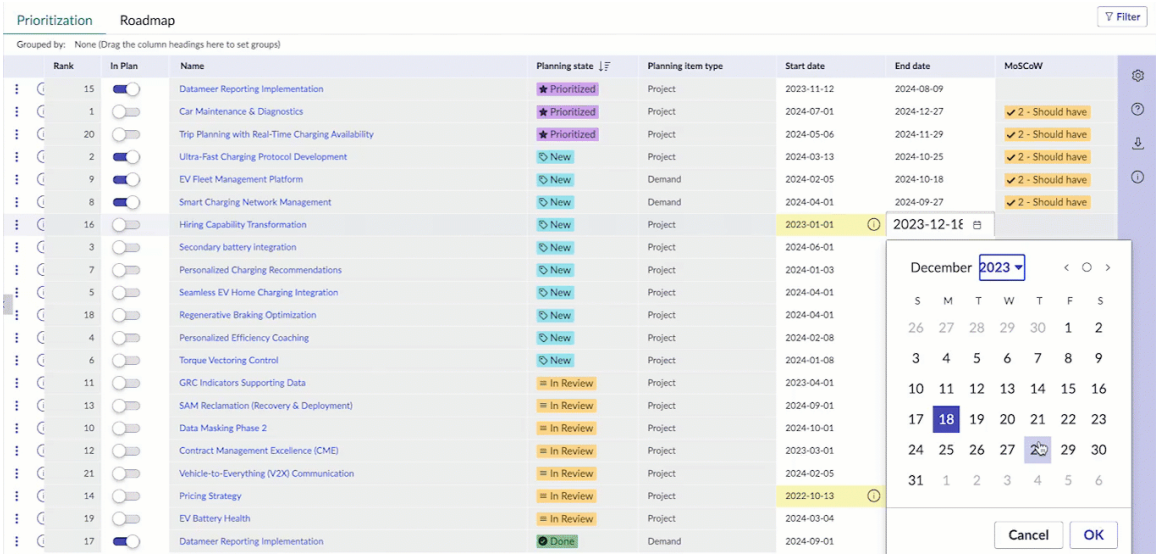
Scenario planning workflow in Portfolio Planning

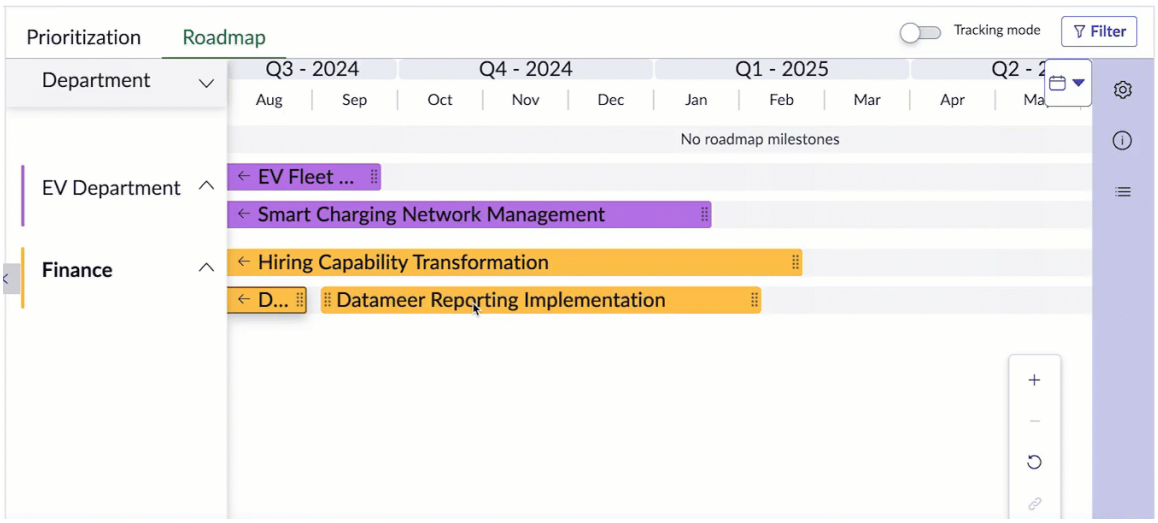
Using the Scenario Planning feature in Portfolio Planning, you can perform the following activities:

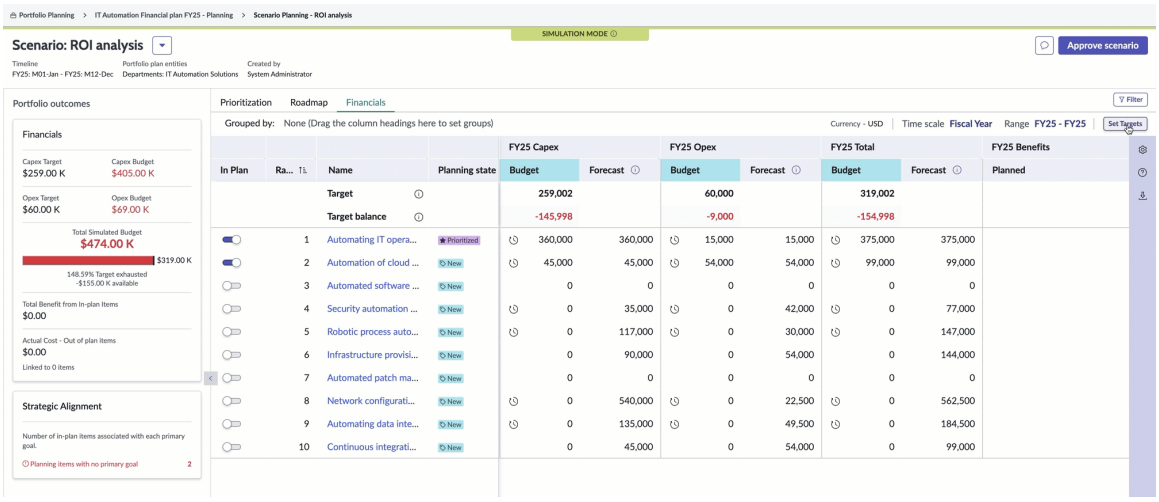
- Create a scenario to explore different strategic approaches and business outcomes. For more information, see Create a scenario in Portfolio Planning.
- Adjust and compare multiple scenarios side by side to evaluate differences in goal alignment, trade-offs, and financial benefits. For more information, see Compare scenarios in Portfolio Planning.
- Approve the best scenario that aligns with the organizational goals. For more information, see Approve a scenario in Portfolio Planning.

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- Set a target portfolio budget for each of your planning cycle, which can be for fiscal period, quarter, yearly, or portfolio timeline.
- Evaluate the target vs proposed budget of In-plan items and review the monetary benefit from the prioritized items.





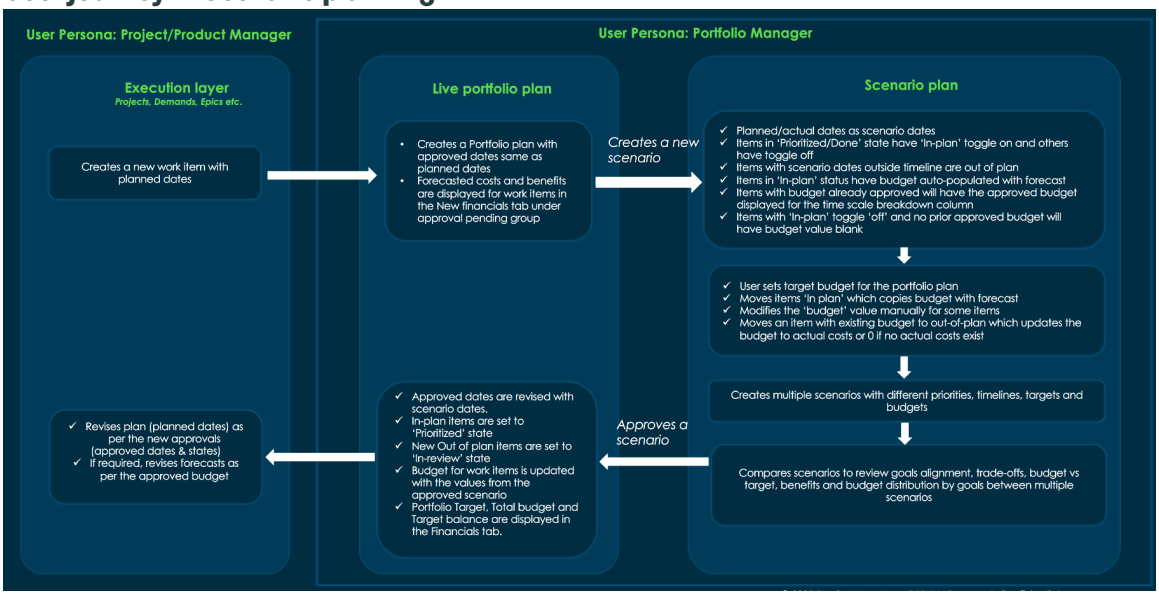


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Scenario Planning workflow overview

The scenario planning workflow involves an execution owner and a portfolio owner. The following illustration illustrates how scenario plans are created based on the planned or actual dates of planning items and how the In-plan toggle is adjusted based on the states of these planning items.

User journey in Scenario planning



For more detailed guidance on using scenario planning to enhance your Portfolio Planning process, see Optimizing planning with scenario planning in Portfolio Planning.

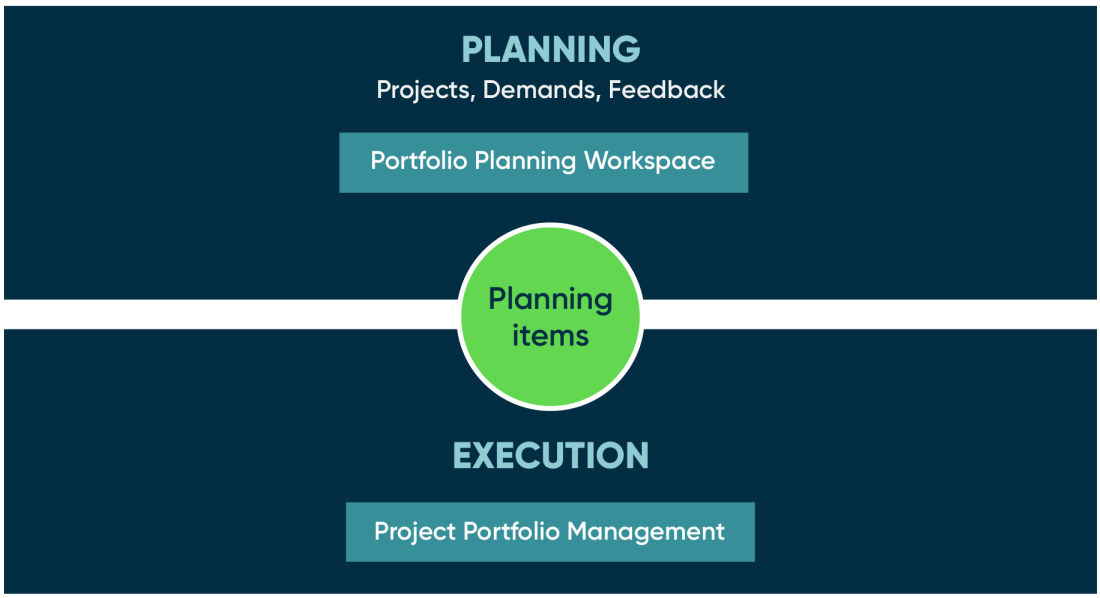
Portfolio Planning with Project Portfolio Management

Facilitate execution of the work planned in Portfolio Planning in ServiceNow Project Portfolio Management (PPM) application.

While planning personas like portfolio managers or product owners use Portfolio Planning to align their plans with the business objectives, execution teams can use PPM to deliver work on the planned projects and demands.

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Portfolio Planning integration with ServiceNow® Project Portfolio Management



Key benefits of Portfolio Planning with PPM

- View available PPM planning items in Portfolio Planning.
- Import planning items from PPM to Portfolio Planning.
- Export planning items from Portfolio Planning to PPM.
- Synchronize updates for linked planning items of Portfolio Planning with PPM.
- Track the progress of the linked planning items in Portfolio Planning.

To get started on integrating Portfolio Planning with PPM, see Configuring Portfolio Planning with PPM.

Capacity in Portfolio Planning

The Capacity tab provides portfolio managers a comprehensive view of capacity, allocations, and utilization of resources.

Analyzing the Capacity screen, you can:

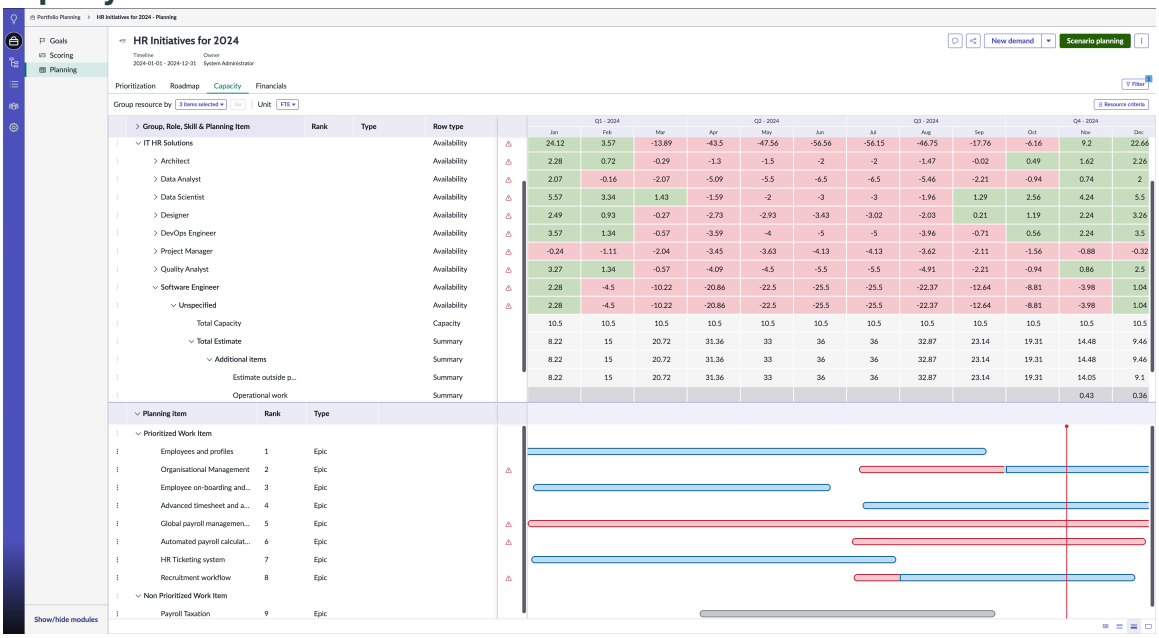
- View resource capacity for prioritized items in your portfolio.
- Understand the resource capacity needs and estimates across your organization by using key attributes such as group, role, and skill.
- Effectively forecast the supply of resources and the demand of work in your portfolio.
- Understand and get an overview of the resource capacity allocations by using the color indicators.
- Plan for resources with specific skills or roles for future assignments.
- View the resource allocation health instantly with the new intuitive user interface that gives you a detailed breakdown of portfolio duration by month having over allocations.

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- Identify the risks in resource capacity for the prioritized planning items using the Rank field.
- Use the warning icons to easily identify the over utilized resources (), planning items with actual dates (), and the planning items or resource groups with no resource assignments ().

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Capacity screen



The top screen area displays:

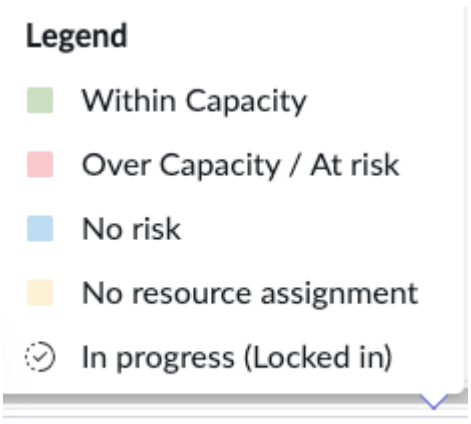
- Resource capacity details depending on the defined resource criteria.
- Allocation details for the time period.
- Resources grouped by primary attributes.

The bottom screen area displays:

- Prioritized planning items.
- Interactive Gantt chart for the duration of planning items. Select a Gantt bar to see the capacity for that specific planning item only.

> **Note:**
> Move the Gantt bar of a planning item to adjust the planned dates depending on the available resource capacity. Planning items with actual dates, indicated with in-progress icon ( ), cannot be adjusted for resource availability.

- Toggle option ( ) to adjust the resource capacity view.
- Legend explaining the visual representation of the resource capacity and Gantt bar of planning items.



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Financial planning for Projects and Demands

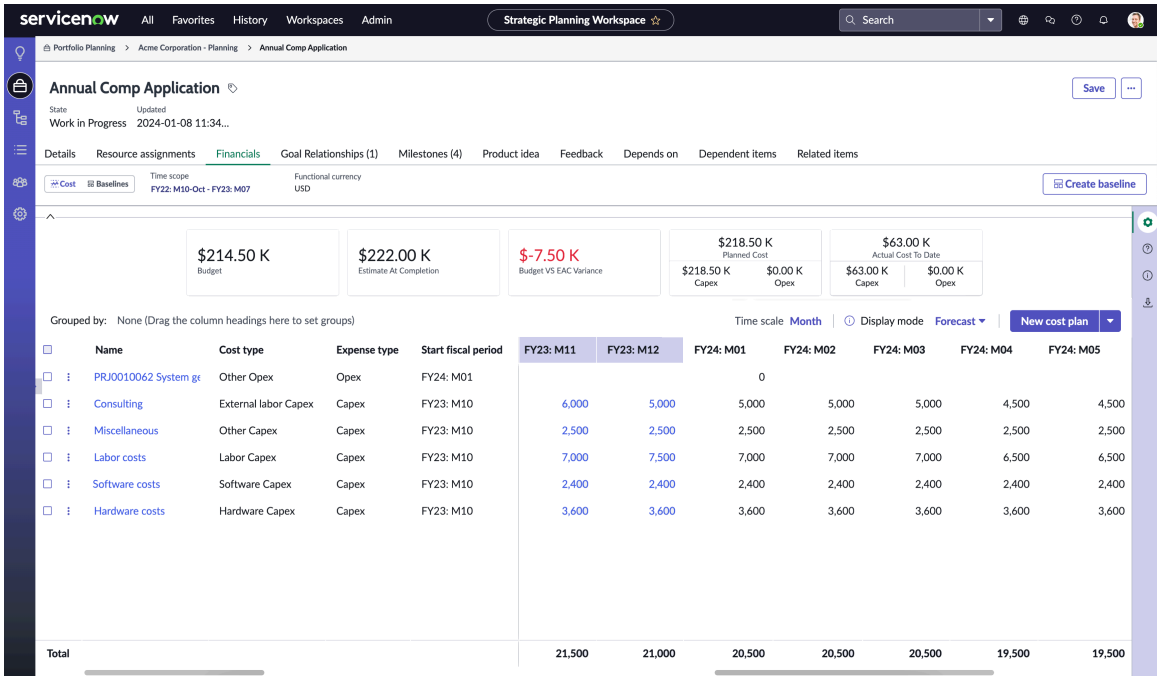
Plan, re-forecast, track the financials, and create baselines for projects and demands.

The financials view provides a streamlined perspective, showcasing the actual and planned expenses for the entire fiscal period. You can view the latest estimated cost of completion by displaying the Actual costs for the past fiscal periods, planned costs for the current and future fiscal periods, the totals for quarter, year, and total duration of work.

The interface gives you the ability to create cost plans, expense lines, and baselines. As a project manager or a financial user, you can:

- Enter high-level financial forecasts for planning items using the simple financials section in the Details tab.
- Work on high-level estimating for Planned opEx and Planned capEx.
- Create a detailed breakdown of the planned costs using the financials tab.
- View the rollups of Planned costs, Actuals costs, and Planned benefits for all of your planning items in the Prioritization grid.
- Add, edit, or delete cost plans effortlessly from the Cost screen.
- Re-forecast your planned expenses using the in-line editing feature.
- View a streamlined perspective, showcasing your actual costs for the past and planned expenses for the future, for the entire time scope of the planning item.
- Get a better comprehensive solution by viewing the Forecast (previously EAC - Estimate at Completion), Remaining Estimates (previously ETC - Estimate to Completion), and Actuals of each cost plan for the total time scope and the yearly breakdowns.
- Re-forecast the planned cost for future fiscal periods by directly updating the quarterly and yearly totals using the in-line editing capability of the grid.
- Generate labor costs depending on the resource assignments for the entire scope of the planning item broken down by the financial attributes configured for your organization. For more information on the planning attributes for attribute-based mapping, see Planning attributes.
- Add or edit expense lines against the cost plans easily from the side panel with the associated cost plan details pre-populated.
- Record unplanned expenses using the New expense line side panel.
- Create and compare financial baseline to track the financials of your planning items.
- Compare the latest costs (actual expenses for past fiscal periods and planned costs for current and future fiscal periods) with the initial forecasted planned costs by creating financial baseline and using the compare baselines capability.
- Analyze the cause of variance in costs and when did this occur over time by capturing the financial baselines manually or automatically.

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You can view the following information on the financials screen.

- Time scope: duration of the planning item or a cost plan, whichever has a larger fiscal period range.
- Functional currency: currency defined and used to calculate the financials.
- Customizable widgets showing different financial information such as allocated budget, Forecast (previously EAC - Estimate at Completion), Variance (the difference between budget and Forecast), breakdown of planned costs, and actuals by cost type.

> **Note:**
> Budget and Budget vs EAC Variance widgets are available for Demands and Projects only.

- Time scale: time period breakdowns to view the financials. Default value is set to Month/ Period, depending on the fiscal calendar type.
- Display mode: list options to switch between different modes to get a focused view of financials.
- Generate labor costs: one-click solution to generate or refresh the planned labor costs for the planning item depending on resource assignments.

> **Note:**
> This option is enabled for the projects with resource assignments only.

- The pane gives you a tabulated view of the cost plan attributes displaying the Name, Cost type, Expense type, Stat fiscal period, End fiscal period, Total planned cost, Employee type, and Role. You can customize these fields. For more information, see Customize the left pane view for financials.
- In the right pane, you can view the total Actuals, Forecast, and Remaining Estimates for the selected Time scope duration. Actual expenses against a cost plan for the past fiscal periods, Actuals, Forecast, and Remaining Estimates for the current fiscal year, and planned costs for the current and future fiscal periods.

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Note:
The header rows of actuals and planned are color-coded differently to help you easily identify and differentiate between the expense types.

- New cost plan: opens a simplified side-panel to create a new cost plan for the entity.
- Personalize option to customize the columns in the left pane of the table.
- Export option to download Cost or Baselines comparison as Microsoft Excel or CSV file.

Dashboards in Portfolio Planning Workspace

As a product and portfolio manager, use dashboards in Portfolio Planning Workspace to monitor performance, track progress, and make informed decisions related to planning and execution. These dashboards leverage Platform Analytics to provide a trend of historical data and regular reports.

The Execution Dashboard is available in the Portfolio Planning Workspace:

You can use the default dashboard or create your own dashboards to monitor performance and take informed decisions.

Benefits of dashboards

- Create data visualizations and add them to the dashboards using the Platform Analytics experience.
- Monitor performance, track progress, and make informed decisions related to planning and execution.
- Duplicate existing dashboards and customize them as needed, without modifying the out-of-the-box dashboards.
- Use the out-of-the-box dashboards or configure your own dashboards as needed.
- Share dashboards with stakeholders to enable collaboration.
- View relevant data by applying filters directly within a dashboard.
- Any filters applied are saved as part of user personalization and are available the next time you log in.

For guidance on using and managing dashboards in the Portfolio Planning Workspace, see Using dashboards in Portfolio Planning.

Better together with other ServiceNow® applications

Integration of Portfolio Planning with other ServiceNow® applications helps portfolio and product managers to optimize planning, collaboration, and release management for their products.

Portfolio Planning with Collaborative Work Management

With the integration of ServiceNow® Collaborative Work Management (CWM) with Portfolio Planning, you can plan and roadmap with Boards in a portfolio plan. By adding CWM Boards to a lens configuration, you can access them in the Prioritization and Roadmap pages of a portfolio plan as planning items.

The lenses supported to configure CMW Board as a planning item are Organization and Project Portfolio.

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For more information on integration of CWM with Portfolio Planning, see Connecting CWM with Strategic Planning or Portfolio Planning.

Configuring Portfolio Planning

Learn about the process required to set up Portfolio Planning to enable your product and portfolio managers start aligning their work business objectives.

Configuration workflow

Use the following steps as guidelines to set up Portfolio Planning. Some of these steps require the admin role and some require the sn_align_core.apw_admin role.

1. Install Portfolio Planning.
2. Assign user roles.

   See the Roles installed table in Components installed with Portfolio Planning.

   Note:
   If you are upgrading from an older version to Portfolio Planning v6.1.1 or higher, a fix script is run to remove the milestone_editor role from the roadmap_editor role because the roadmap_editor role is no longer used. In this case, you may experience a longer time for the upgrade to complete if your ServiceNow instance has a large number of users with the roadmap_editor role. For more information, see KB1443618.

3. Configure lenses to enable portfolio plans.

   See Configuring lens in Portfolio Planning.

4. Integrate ServiceNow® Portfolio Planning with Project Portfolio Management (PPM).

   See Portfolio Planning with Project Portfolio Management.

5. Configure Capacity Planning and generate resource capacity.

   See Capacity configuration in Portfolio Planning.

6. Enable financial planning for epics and customise the Financials screen view.

   See Configure financials for planning items in Portfolio Planning.

Guided Setup to configure Portfolio Planning

Guided Setup provides a sequence of tasks to help you with the required configuration on your ServiceNow instances. After installing Portfolio Planning, navigate to **All** > > **Portfolio Planning** > **Guided Setup**.

When you're configuring a task from the Guided Setup, you can launch the in-app help for additional guidance by clicking the Show Help icon ( ).

Install Portfolio Planning

You can install the Portfolio Planning application (sn_align_ws) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

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Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Portfolio Planning application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Portfolio Planning:

- Roles
- Tables

For more information, see Components installed with Portfolio Planning.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Portfolio Planning application (sn_align_ws) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Result

The following components are installed with installation of the Portfolio Planning application:

- Roles
- Tables

See Components installed with Portfolio Planning for more information.

Configuring lens in Portfolio Planning

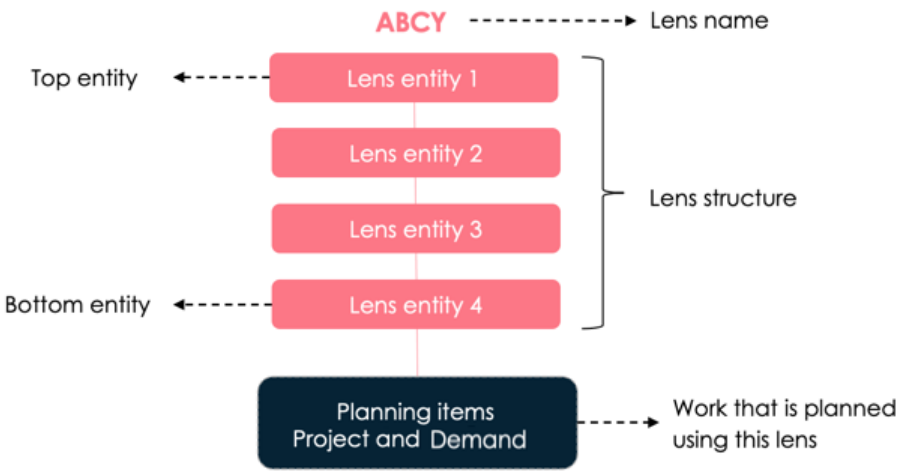
Learn about lens structure and pre-defined lenses in Portfolio Planning so that you can configure a lens that represents your company's planning process.

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Lens structure

Each lens in Portfolio Planning consists of a structure that is made up of lens entities. These entities represent different levels of planning. Planning managers can build portfolio plans at one of these levels, and create plans for the type of work items that are associated to this lens.

Sample lens structure

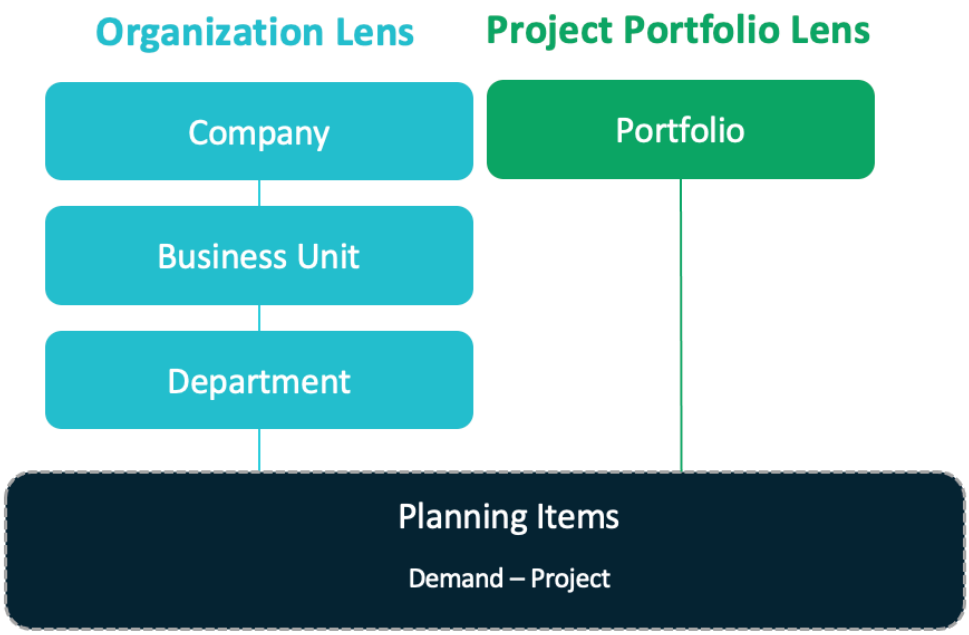


Pre-defined lenses in Portfolio Planning

Two pre-defined lenses, Organization and Project Portfolio are available.

For example, the Organization lens has Company, Business Unit, and Department as its entities. A department head can create a portfolio plan at the department level, and start to prioritize and roadmap the department's work. This work can be in the form of projects, demands, or any other custom type that is configured.

Lens structure of pre-defined lens



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In the Portfolio Planning Workspace, planning managers can get started with creating portfolio plans with one of the pre-defined lenses.

Planning items for a lens

For every portfolio plan that is built using a lens, only those item types that are included with that lens are available for planning. For example, a lens XYZ has just demands added to it. Then, in any portfolio plan that is built using the XYZ lens, work can be planned in the form of demands only.

Configuring lens and lens structure

You can either use a pre-defined lens as it is or update its existing configuration.

- To use the lens as it is, complete your lens setup by configuring integration with a ServiceNow Project Portfolio Management.

  See Configuring Portfolio Planning with PPM.

- To update the lens configuration:
  - Change the planning items included within the lens. See Lens Form.
  - Add more entities to the lens structure. See Modify lens structure in Portfolio Planning.

Modify lens structure in Portfolio Planning

Add or modify entities for your lens structure so that your planning managers can start creating their portfolio plans in Portfolio Planning.

Before you begin

Ensure that your application scope is set to **Portfolio Planning Core**.

Role required: admin

About this task

For a lens, add entities to modify its existing structure. You can add up to six entities in a lens structure. For more information on lens and its structure, see Configuring lens in Portfolio Planning.

Procedure

1. Navigate to **All** > **Portfolio Planning** > **Lenses**.
2. From the Lenses list, select a lens for which you want to update the lens structure.
3. Add an entity to the lens structure.

   a. From the Lens structure related list, select **New.**

   b. On the form, fill in the fields.

   For field information, see Lens structure form.

   c. Select **Submit.**

4. Repeat step 3 to complete adding all your lens entities.

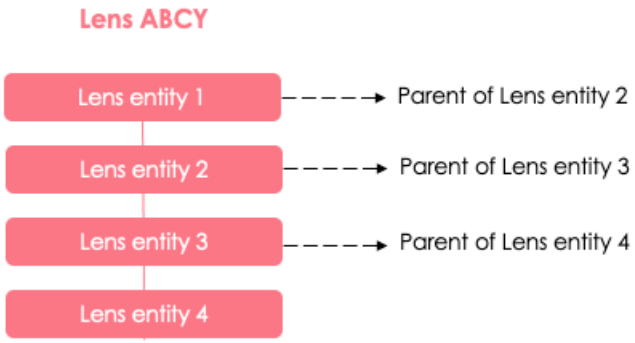
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- Add the entities in a top-down manner:

  Add the top-level entity first, followed by the second-level entity, followed by the third, and so on.

- Ensure that every entity, except the top-level, has a parent entity reference.

  For example, the second-level entity must refer to the top-level entity as its parent.



What to do next

1. Verify that the Planning item table [sn_align_core_planning_item] has a field that references the bottom entity of this lens.
2. Ensure that the following form views for all the planning item types that are associated in your lens contains a field for the bottom entity of your lens structure.
   - APW Preview
   - APW New
   - APW Default
3. Update the roadmap configuration for the tables of all planning item types that you associate with this lens:

   Add the bottom entity of this lens structure and its parent to **Group by fields** and **Color by fields**. These fields are used as the default group by and color by settings for the portfolio roadmap. See Customize the display preferences for Prioritization and Roadmap in Portfolio Planning Workspace.

4. Validate your lens configuration and activate it. See Activate a lens in Portfolio Planning.

Activate a lens in Portfolio Planning

Validate your lens configuration and activate it so that your planning managers can start creating portfolio plans using this lens.

Before you begin

Role required: admin

About this task

If you've changed the structure of an existing lens, validate its configuration and set its state to Active.

Planning managers can create portfolio plans using only lenses that are active. For a lens to be available in the workspace for a planning manager, its configuration must be valid and must be in the Active state.

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Procedure

1. Navigate to **All** > **Portfolio Planning** > **Lenses**.
2. From the Lenses list, select a lens.
3. On the lens form, click the **Validate Lens** related link.
   - If the lens configuration is valid, a success message prompts you that you can now activate it.
   - If the lens configuration isn't valid, use the error messages to understand the issues and fix the configuration.

     Try validating the lens using the related link again.
4. Select the **Active** field and save the form.

Related topics

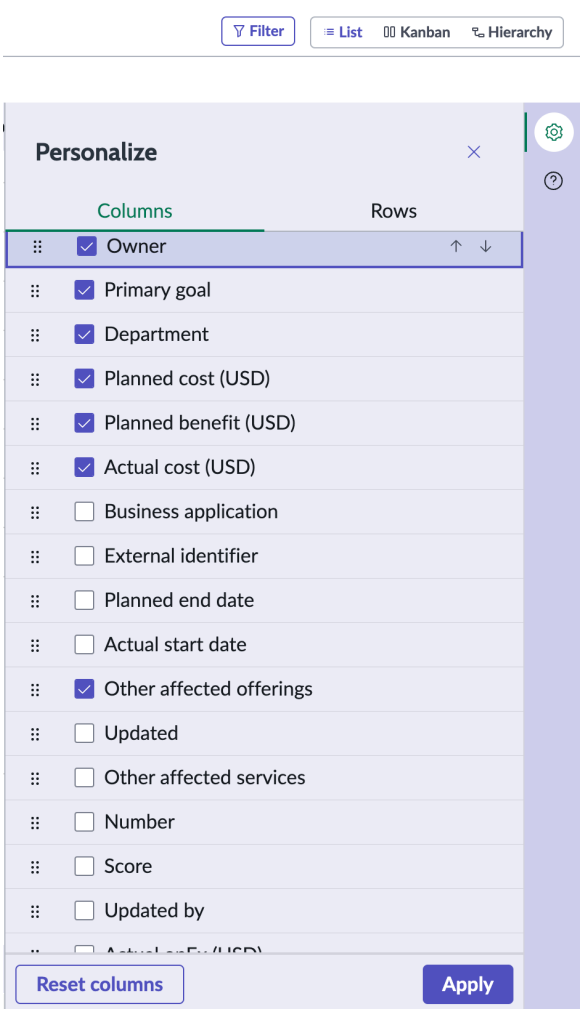
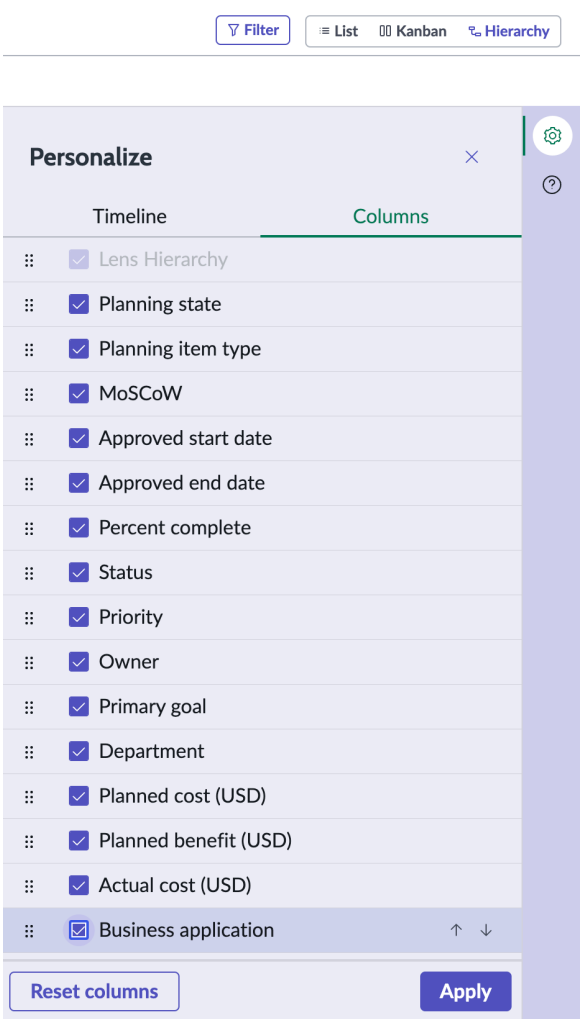
Modify lens structure in Portfolio Planning

Configuring additional columns for Prioritization page in Portfolio Planning

Configure what columns must be displayed on the Prioritization page of portfolio plans so that your planning managers can select the appropriate data points they need.

Portfolio managers or product owners can show or hide the data for their planning items by using the Personalize side panel in the Prioritization page of their workspace. By default, this side panel of List and Hierarchy views provides all the default fields available for that planning item. If your planning managers want to see additional columns, for example, there could be a requirement of information from a dot-walked field. In such cases or to remove any existing choices, you can configure them using the admin role.

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Personalize settings for List view	Personalize settings for Hierarchy view
	

Add extra columns as choices to this side panel or remove any of the default column choices by updating the list layout configuration for the planning item types associated to the portfolio plan.

- If the portfolio plan has multiple item types associated to it, update the view configuration of the Planning Item [sn_align_core_planning_item] table.
- If the portfolio plan has a single item type associated to it, update the view configuration of the relevant table.

From the form view of the identified table, change the view to **APW Prioritization**, and update the list layout. For the detailed procedure of updating the layout configuration for a list, see Configure the list layout.

Note:
List v3 is no longer available for new deployments. If you are already using list v3, you may continue to do so, but in this case some of the functionalities might not be available.

Configuring Prioritization and Roadmap settings in Portfolio Planning

Configure the way data is shown on the Prioritization and Roadmap pages of the workspace so that your planning managers view the information that is relevant for them.

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Customizing highlighted fields on prioritization page of Portfolio Planning workspace

Customize the fields to be highlighted on the Prioritization page of a portfolio plan according to your planning manager's needs.

By default, the List and Hierarchy views of the Prioritization page of a portfolio plan highlight the **Planning state** and **Status** fields of a planning item with colors. Based on your planning manager's requirements, you can configure fields that are of Choice type, such as Owner or Priority to also be the highlighted columns on the page. This customization requires:

- Modifying the Prioritization view Script Includes (APWBacklogConfigImpl for List view and APWGanttConfigImpl for Hierarchy view).
- Configuring a new record for the required field in the sys_highlighted_value table.

Modify Script Includes for Prioritization page in Portfolio Planning

Modify the Script Includes for List and Hierarchy views of the Prioritization page to change the columns to be highlighted in these views in the workspace.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Script Includes**.
2. From the list, select one of the following:
   - For List view, select APWBacklogConfigImpl
   - For Hierarchy view, select APWGanttConfigImpl
3. Update the column name in the **Script** field of the Script Include.

   In the *`getColumnsForHighlightedValues`* function, update the return value to the desired column.

   For example, if you want to highlight the Priority column, update the return value to `("planning_state", "state", "priority")`.
4. Select **Submit**

What to do next

Create new highlighted values for Prioritization columns in Portfolio Planning

Create new highlighted values for Prioritization columns in Portfolio Planning

Customize the fields to be highlighted on the Prioritization page of a portfolio plan according to your planning manager's needs.

Before you begin

Modify Script Includes for Prioritization page in Portfolio Planning.

Role required: admin

Procedure

1. Navigate to **Workspace Experience** > **Administration** > **Highlighted Values**.
2. Select **New**.
3. On the form, fill in the fields.
   For field information, see Highlighted Value form.

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4. Save the form.
5. In the Highlighted Value Conditions related list, create records to configure the color, order, and icon for each of the field values that you want to be highlighted in the workspace.

   a. Select **New**

   b. On the form, fill in the fields.
   For field, information, see Highlighted Value Condition form.

   c. Select **Submit**.

6. Repeat step 5 to complete this configuration for all the field values.
   For example, if you are configuring for status column, you must create three records in the Highlighted Value Conditions related list for each of the choices Red, Green, and Yellow.
7. Select **Update**.

Modify Script Includes for milestone icons in Portfolio Planning Workspace

Modify the Script Includes for milestone icons of the roadmap and portfolio plan to customize the icons to be shown in the Roadmap tab in the workspace.

Before you begin
Role required: admin

Procedure

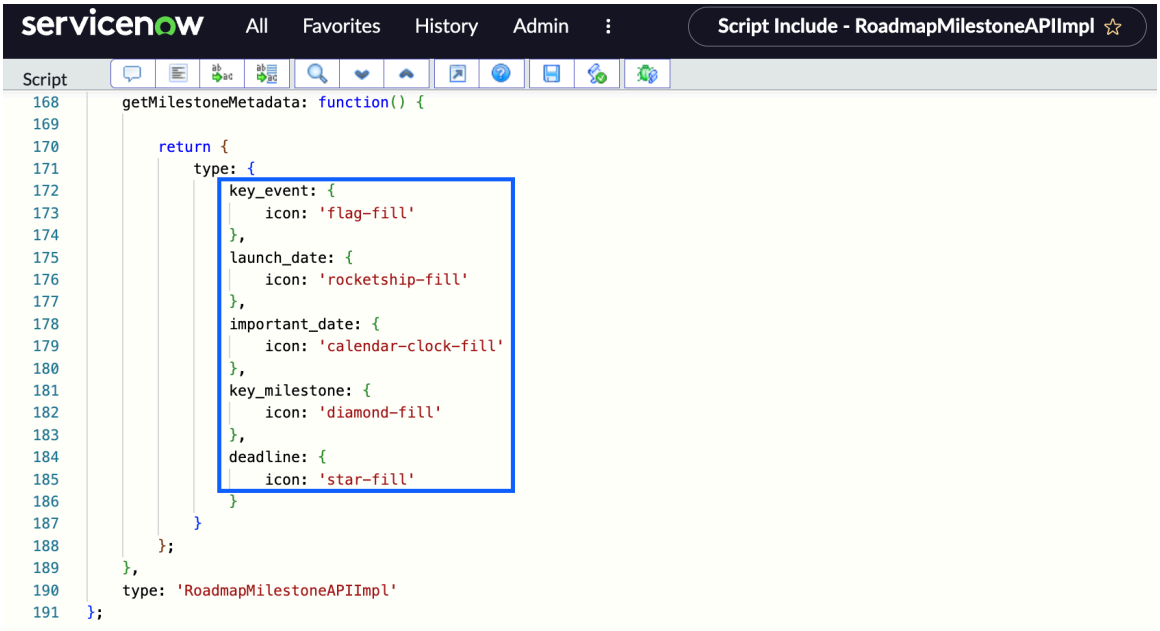
1. Navigate to **All** > **System Definition** > **Script Includes**.
2. From the list, select RoadmapMilestoneAPIImpl.
3. Update the milestone icon type in the **Script** field of the Script Include.
   In the *`getMilestoneMetadata`* method, update the return value to the required icon.

   For example, if you want to display the Circle exclamation icon () for key event milestone, update the return value to `'circle-exclamation-outline'` for the key_event milestone.

   The default icons are as follows:

   - key_event: `'flag-fill'`
   - launch_date: `'rocketship-fill'`
   - important_date: `'calendar-clock-fill'`
   - key_milestone: `'diamond-fill'`
   - deadline: `'star-fill'`

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4. Select **Update**.

Configure additional source tables for free-form roadmap in Portfolio Planning

Add new tables to roadmap preferences and configure their details so that these tables can be used as source tables while creating a free-form roadmap in Portfolio Planning.

Before you begin

Install Portfolio Planning.

Role required: sn_align_core.apw_admin

Procedure

1. Navigate to **All** > **Portfolio Planning** > **Portfolio Plan Configuration**.
2. Select **New**.
3. On the form, fill in the fields.
   For field information, see Portfolio plan configuration form.
4. Select **Submit**.

Customize the display preferences for Prioritization and Roadmap in Portfolio Planning Workspace

Update source table configurations so that you can customize the roadmap view in Portfolio Planning according to your business priorities.

Before you begin

Install Portfolio Planning.

Role required: sn_roadmap_plng.roadmap_admin or sn_align_core.apw_admin

About this task

For the source tables that you use to create your portfolio plans or free-form roadmaps, modify the configuration. You can update the fields to group and color the items on the roadmap, the metrics to be displayed for each item, and others.

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Procedure

1. Navigate to **All** > **Portfolio Planning** > **Portfolio Plan Configuration**.
2. Open a table for which you want to edit the configuration.
3. Edit the required fields.
   For field information, see Portfolio plan configuration form.
4. Select **Update**.

Update the display limit of items for Prioritization and Roadmap in Portfolio Planning

Create a system property to update the display limit of the items shown in Prioritization page, Roadmap page, and the item milestones on the roadmap view in Portfolio Planning.

Before you begin

Ensure the application scope in your instance is set to Global.

Role required: admin

About this task

The default display limit for Prioritization and Roadmap pages are:

- Planning items shown in the prioritization view = 500
- Roadmap items shown in the roadmap view = 500
- Item-level milestones in the roadmap view = 100
- Items shown in all the Kanban views = 500

If the total number exceeds these default limits, the additional number of planning items, milestone indicators, and vertical lanes are not visible in the workspace. To overwrite this default setting, create a system property and set it value to a desired limit of display.

Important:
If the value of a system property exceeds its default value, the UI performance can degrade.

Procedure

1. Navigate to **All** > **System Properties** > **All Properties**.
   A list of all the properties in the System Properties [sys_properties] table appears.
2. Click **New**.
3. On the form, fill in the fields.
   For information on the other form fields, see the field description table in Add a system property.
4. Select **Submit**.

Hierarchy view configuration in Portfolio Planning

Show or hide parent records of planning items shown in the Hierarchy view for high-level and regular portfolio plans by configuring system properties.

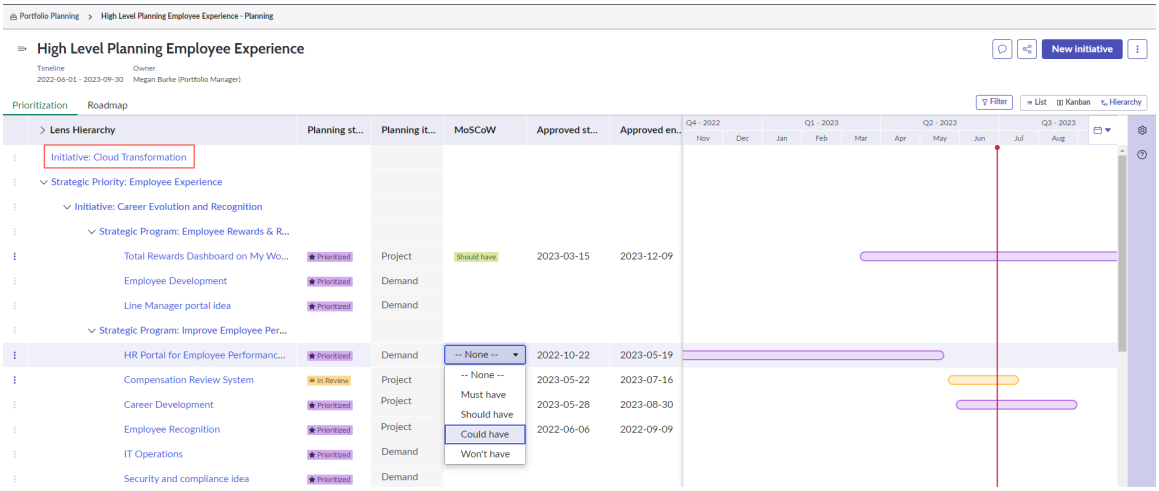
Display empty parent entities in the Hierarchy view

In the Hierarchy view of the Prioritization tab, the parent records are displayed only if they have any associated planning items.

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For example, a portfolio plan built from the Organization lens (Company > Business Unit > Department) is used to manage and track plans for Demands and Projects. So, when you switch to the Prioritization Hierarchy view, only those departments that have at least one Demand or Project associated with it are shown in the view.

If you want to see other departments that are included in this portfolio plan but have no planning items associated to them, work with your administrator to create the system property *sn_align_ws.gantt_hide_empty_entities* and set it to **false**.

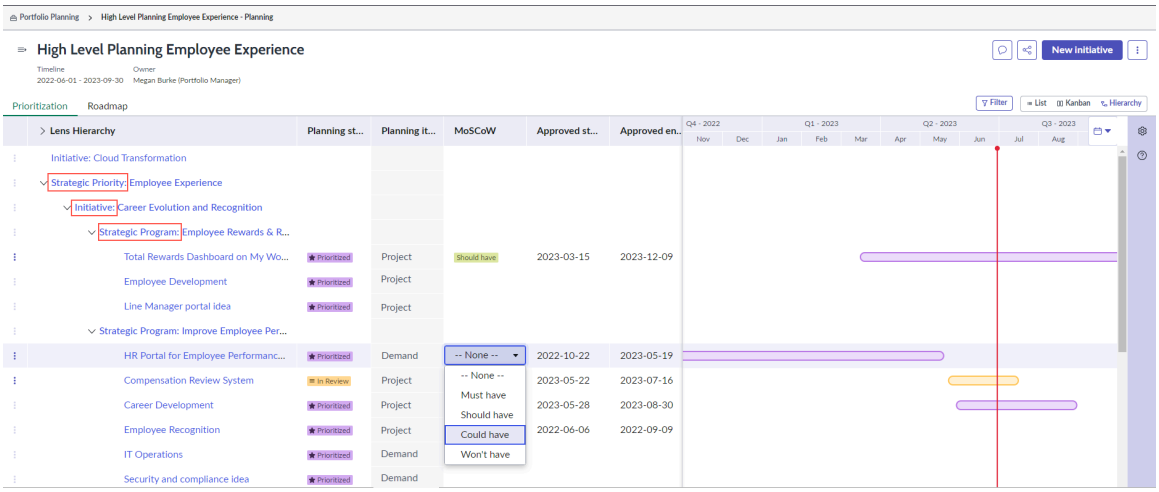


Display complete hierarchy for high-level portfolio plans

For high-level portfolio plans, the Hierarchy view by default shows only the hierarchy up to the parent level.

For example, a portfolio plan built from the Strategic Investment lens (Company > Strategic priority > Initiative > Strategic program) is used to manage and track plans for strategic programs. So, when you switch to the Prioritization Hierarchy view, only Strategic Priority > Initiative levels are shown by default.

If you want to see the whole hierarchy of Strategic priority > Initiative > Strategic program > planning items, work with your administrator to create the system property **true**.



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Customizing Lists in Portfolio Planning Workspace

You can add custom tables to the Lists menu in Portfolio Planning Workspace and manage access to the newly created categories and lists.

Perform the following tasks to customize Lists and manage access to the newly created categories and lists in the Lists page of Portfolio Planning Workspace:

- Add the **New** button to the APW List Menu Configuration page. For more information, see Enable adding custom tables to the Lists menu.
- Add custom tables to the Lists menu. For more information, see Customize Lists in Portfolio Planning Workspace.
- Manage who can view the newly created categories and lists in the Lists page. For more information, see Define audience for new lists in Portfolio Planning.

Enable adding custom tables to the Lists menu

Add the **New** action button to the APW List Menu Configuration page, so that you can add custom tables to the Lists menu in Portfolio Planning Workspace.

Before you begin

Role required: admin

Procedure

1. Navigate to **Workspace Experience** > **Actions & Components** > **List Actions**.
2. From the Action Assignments page, select **New** to create the action button.
3. On the form, fill in the fields.
   For a description of the field values, see Action Assignment form.
4. Select **Submit**.

Result

The **New** action button is added to the APW List Menu Configuration page.

What to do next

Customize Lists in Portfolio Planning Workspace.

Customize Lists in Portfolio Planning Workspace

Add custom tables to the Lists menu in Portfolio Planning Workspace.

Before you begin

Role required: admin

- Ensure that your application scope is set to **Portfolio Planning**.
- Enable adding custom tables to the Lists menu.

About this task

Lists menu in the Workspace homepage helps planning managers quickly find a record that they need. By default, this view shows the list of entities of all the planning items and lens available for this ServiceNow instance. If your planning managers need more categories or lists, you can add them.

For more information of configuring lists in a workspace, see Lists.

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Procedure

1. Navigate to **sys_ux_list_menu_config.list**.
2. From the UX List Menu Configurations list, select **APW List Menu Configuration**.
3. Select a new category or a new list.

   Tip:
   Create a category first and then create a list.

4. On the form, fill in the fields.
   - UX List Category form.
   - UX List form.
5. Select **Submit**.
   Repeat this procedure until you've created all the custom categories and lists.

Define audience for new lists in Portfolio Planning

Manage who can view the newly created categories and lists in the Lists page of Portfolio Planning Workspace.

Before you begin

Customize Lists in Portfolio Planning Workspace.

Role required: admin

Procedure

1. Navigate to **sys_ux_applicability_m2m_list.list**.
2. Select **New**.
3. On the form, fill in the fields.
   For field information, see List Applicability form.
4. Select **Submit**.

Configure scenario planning in Strategic Planning

Configure scenario planning in strategic planning to create and compare multiple scenarios.

1. Enable or disable scenario planning.

   For more information, see Enable or disable scenario planning in Portfolio Planning.

2. Manage financial widgets in compare scenarios page.

   For more information on how to add and manage widgets to the comparison view, see Configure financial widgets in compare scenario.

Enable or disable scenario planning in Portfolio Planning

Enable or disable scenario planning in Portfolio Planning.

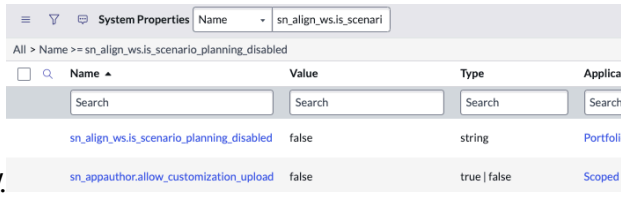
Before you begin

Role required: admin

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About this task
Scenario planning is enabled by default. Use the following steps to disable or enable scenario planning, as required.

Procedure
1. Navigate to **All> System Properties**.
2. Search for the property



   sn_align_ws.is_scenario_planning_disabled.
3. Verify the value of the property.
   - To enable scenario planning, verify that the property is set to **False**.
   - To disable scenario planning, verify that the property is set to **True**.

What to do next
Create a scenario in Portfolio Planning

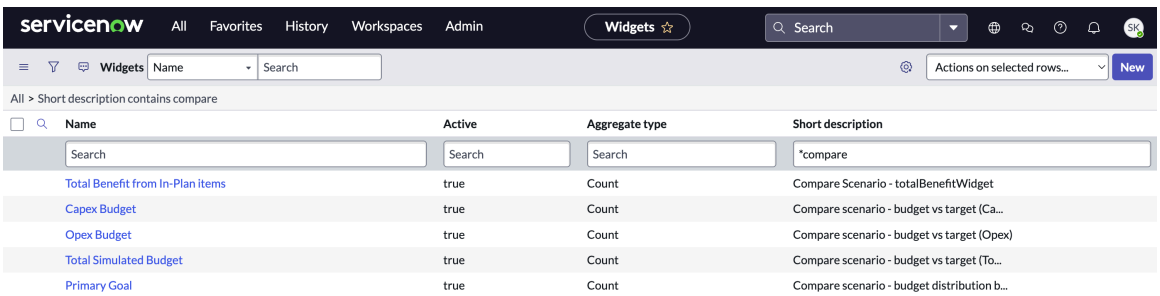
Configure financial widgets in compare scenario

Add or manage existing widgets to view financial insights while comparing scenarios. Define your own attribute from the cost types to view it's details in the Compare scenario page.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Project Administration** > **Widgets**.
2. In the Widgets list, filter the Short description with **Compare scenario** to view the existing list.

   By default, there are five financial widgets enabled to compare the financial performance of scenarios.



3. Edit an existing widget or create a widget to use it in scenario planning.

4. Select **Submit**.

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Portfolio Planning diagnostics

Run diagnostic scans to identify and fix errors in the configuration and other common settings for Portfolio Planning before your planning managers prioritize and roadmap their projects and demands.

Portfolio Planning diagnostic scans help you find discrepancies by validating the configuration for the following:

- Lens and lens structure
- Form views, list views, related list views, and workspace view rules for planning items
- Global ranking for planning items
- Portfolio plans

The following are the default diagnostic scans available for Portfolio Planning.

Portfolio Planning diagnostics

Name of the scan	Description
Identify planning items without a global rank	Identifies the number of planning items on the Prioritization List page, for which the global rank is not populated. If this scan fails, the result shows the planning items that do not have a global rank. Click **Run Fix Script** to populate a global rank to items for which this field is empty.
Validate List views for planning items	Verifies that all the planning items that can be added to portfolio plans have the APW Prioritization and APW Default List views. If this scan fails, the result displays the List views that are missing for certain planning item tables. To learn how to fix these, see Create list views for new planning item tables in Strategic Planning.
Validate Form section views for planning items	Verifies that all the planning items that can be added to portfolio plans have the APW Prioritization, APW Default, and APW New form views. If this scan fails, the result displays the Form section views that are missing for certain planning item tables. To learn how to fix these, see Create form views for new planning item tables in Strategic Planning.

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Name of the scan	Description
Validate Related list views for planning items	Verifies that all the planning items that are allowed on portfolio plans have the APW Default Related list view. If this scan fails, the result displays the Related list views that are missing for certain planning item tables. To learn how to fix these, see Create related list views for new planning item types in Strategic Planning.
Validate Workspace view rule for Default view of planning items	Verifies that all the planning items that are allowed on portfolio plans have the Default view's workspace view rule. If this scan fails, the result displays the Default view rule is missing for certain planning item tables. To learn how to fix these, see Create workspace view rules for new planning item forms in Strategic Planning.
Validate Workspace view rule for APW Default view of planning items	Verifies that all the planning items that are allowed on portfolio plans have the APW Default view's workspace view rule. If this scan fails, the result displays the APW Default view rule is missing for certain planning item tables. To learn how to fix these, see Create workspace view rules for new planning item forms in Strategic Planning.
Validate invalid fields in the Portfolio Plan configuration	Finds any invalid fields in the portfolio plan configuration records for all existing portfolio plans. If this scan fails, click **Run Fix Script** to remove the identified invalid fields.
Validate Portfolio Plan Configuration for all the portfolio plans	Verifies if each existing portfolio plan created in your instance has a valid portfolio plan configuration.

Capacity configuration in Portfolio Planning

Generate employee profiles for resources and map them with primary attributes to start capacity planning.

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- Enable the planning attributes for capacity to map resources to a unique attribute. For more information, see Enable planning attributes for capacity in Portfolio Planning.
- Create resource assignments and generate employee profiles. For more information, see Generate employee profiles for resources to work with Capacity.
- Map resources to a unique group, role, and skill to generate employee profiles. For more information, see Map primary attributes to resources.

Enable planning attributes for capacity in Portfolio Planning

Enable the planning attributes Group, Skill, and Role so that your planning managers can view the resource capacity details.

Before you begin

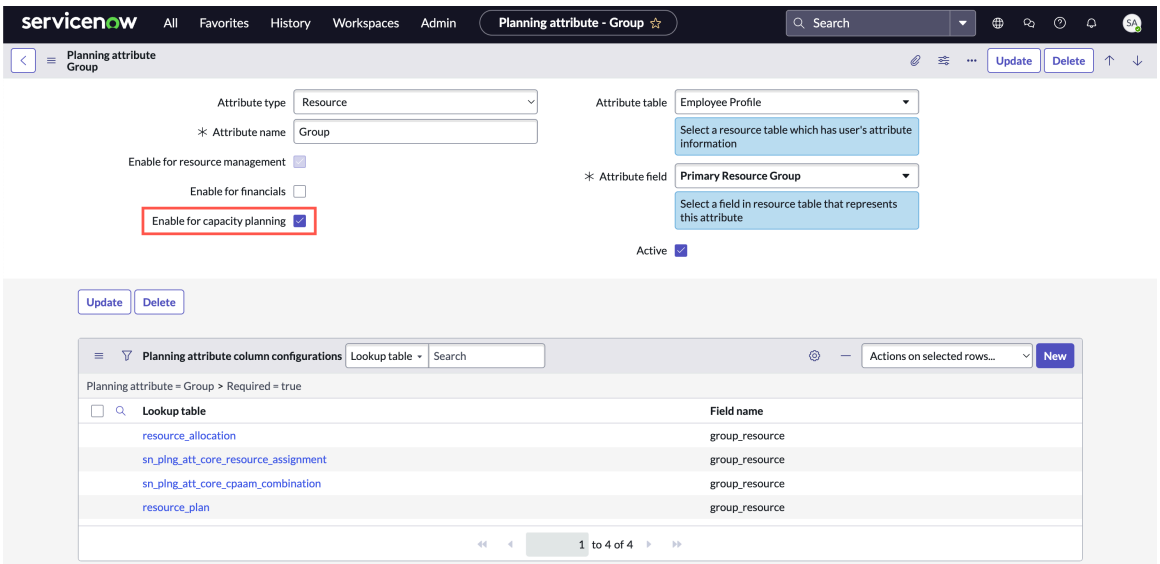
Role required: admin

Note:
This activation is a one-time task to enable planning attributes to plan and work on resource capacity.

Procedure

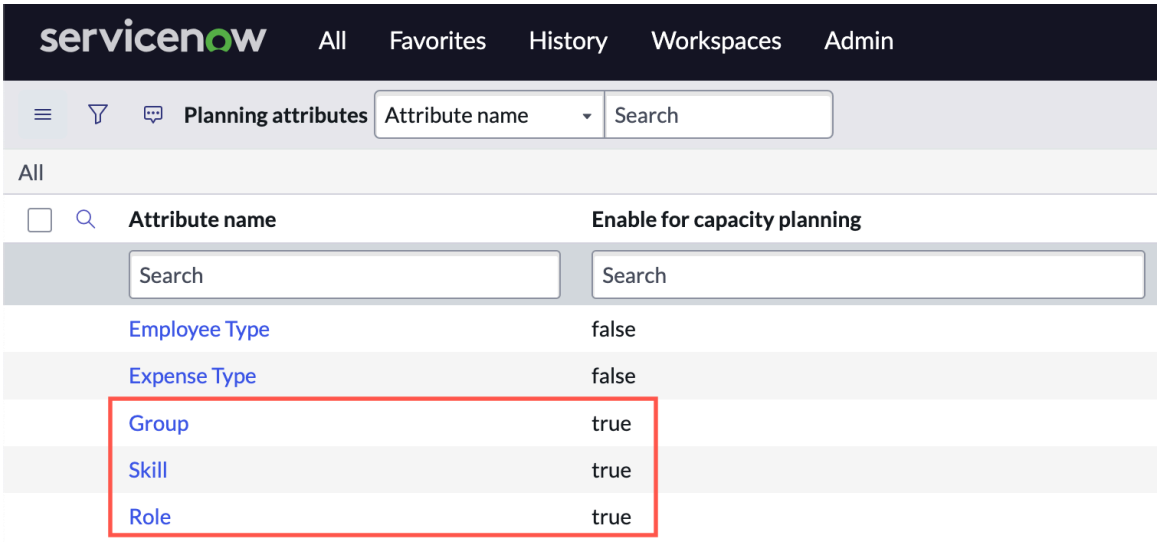
1. Navigate to **All** > **Portfolio Planning** > **Planning Attributes**.
2. Filter the Attribute name to locate and open the **Group** attribute.
3. Select the **Enable for capacity planning** option.
4. Select **Update**.

Note:
If an attribute is enabled for capacity planning, it is enabled for resource management by default.



5. Repeat the steps 2 through 4 for the **Skill** and **Role** attributes.

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You can create custom attributes and map them to resources. For more information, see Create or edit planning attributes.

6. Set the value of the Enable for capacity planning column for Group, Role, and Skill field to **true**.

What to do next

1. Configure attribute values: Navigate to **All** > **Strategic Planning** > **Planning Attributes** to view and manage attribute values. You can add, edit, or import attribute entries for Group, Skill, and Role.
2. Map attributes to resources: Assign the enabled planning attributes to your resources so they appear in capacity views. For custom attributes, see Create or edit planning attributes.
3. Start capacity planning: Navigate to the Capacity tab in your *`Strategic Planning Workspace`* to view resource capacity based on the enabled attributes.

Generate employee profiles for resources to work with Capacity

Generate employee profiles for the resources to map against primary attributes.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Employee Profile** > **Employee Definition**.
2. Filter the name to locate and open the **sys_user** table.
3. In the Employee Definition page, select **User** from the Table list.
4. Use the condition builder to filter the required resources and then select the update count icon ( ).
5. Select **Generate Employee Profiles** (Generate Employee Profiles).
6. In the Generate Employee Profiles window, select **Proceed**.

Result

Employee profiles for the selected resources are generated.

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What to do next

Populate a primary group, primary role, and primary skill for the resources with employee profiles. For more information, see Map primary attributes to resources.

Map primary attributes to resources

Locate and map the primary group, primary role, and primary skill for the resources associated with existing employee profile tables.

Before you begin

Generate employee profiles for resources to work with Capacity.

Role required: admin

Procedure

1. Navigate to **All** > **Employee Profile** > **Employee Profiles**.
2. Filter the User column to locate and open the resources with employee profiles.
3. Select the **Populate primary resource attributes** related link to auto-populate the attributes.
   - If an employee is assigned to a single group, role, and skill, the primary attributes are populated.
   - If an employee is assigned to multiple groups, skills, or roles, select the **Primary Resource Group**, **Primary Resource Role**, and **Primary Resource Skill**, using the lookup icon.
4. Select **Update**.

Activate a scheduled job to automatically generate resource capacity

Activate the scheduled job to auto-generate the resource capacity at required cadence.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Filter the name field to locate and open **Generate Resource Capacity**.
3. Select **Active** option to activate the schedule job.
4. Edit the fields on the Scheduled Script Execution form to customize the job and meet your requirements.
   For more information about the field description and scripts, see Automatically run a script of your choosing.
5. Select **Execute Now** to execute the scheduled job or select **Update** to save your changes.

Configure financials for planning items in Portfolio Planning

Configure the ServiceNow Internal integrations to view the financials for planning items in Portfolio Planning.

Before you begin

Role required: admin

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Procedure

1. Configure the attributes to generate labor costs in financials based on the resource assignments on the work items.
   For more information, see Planning attributes and Create or edit planning attributes.
2. Generate default mapping configurations to create table maps.
   For more information, see Generate default mapping configurations.
3. Create new widgets to view the rolled up financial data at planning item level.
   For more information, see Configure a widget and associate it with project.
4. **Optional:** Customize the left pane in the financials screen to match the requirements of your organization.
   For more information, see Customize the left pane view for financials.
5. Enable budgeting option to allocate and manage budget of your planning items.
   For more information, see Enable financial budget allocation for planning items in Portfolio Planning.
6. Configure the budget attribute to expense type or cost type to manage the budget of your planning items.
   For more information, see Configure budget attribute at instance-level to allocate budget.
7. **Optional:** Customize the Create cost plan form fields to match the requirements of your organization.
   For more information, see Customise cost plan form.
8. Customize the default expense types to manage cost plans for your planning items.
   For more information, see Change the default expense type in Portfolio Planning.
9. Define a custom prefix for your baseline name.
   For more information, see Create a custom prefix for baseline.
10. Activate and define a scheduled job to migrate budget for your planning items.
    For more information, see Activate a scheduled job to migrate budget of your planning items
11. Activate and define scheduled job to automatically create financial baselines for your planning items at a defined cadence.
    For more information, see Activate a scheduled job to create financial baselines for your projects and demands.
12. Activate and define a scheduled job to generate labor costs for your projects and demands based on the attribute-based resource assignments.
    For more information, see Activate a scheduled job to generate labor costs for your projects and demands.

Customize the left pane view for financials

Customize the left pane for financials to view custom field information.

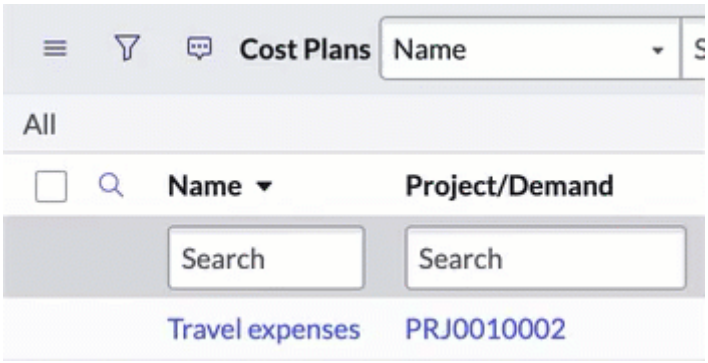
Before you begin

Role required: admin

Procedure

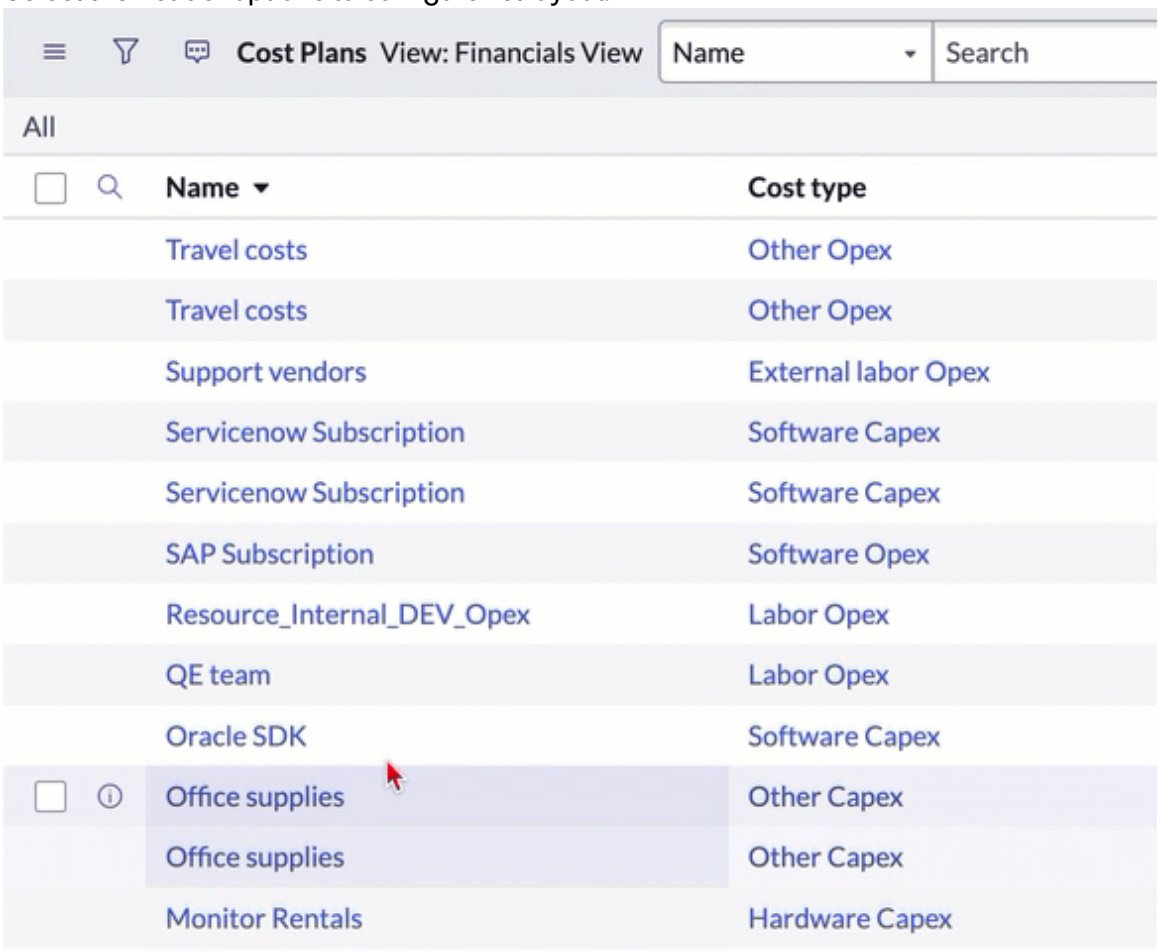
1. Navigate to **All** > **System Definition** > **Tables**.
2. Filter the Label field to locate and open the **Cost Plan** table.
3. Select the **Show List** related link.
4. Select the financials view by navigating to **List controls** > **View** > **Financials View**.

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The selected view (...) is displayed on the header.

5. Select the header options to configure list layout.



6. Add or remove the fields in the Selected column to customize the left pane view in financials view.
7. Select **Save**.

Result

Cost plans table with customized fields for Financials View is displayed.

Add monetary and non-monetary benefit plans related lists

Add the monetary benefit plans and non-monetary benefit plans related lists for your planning item.

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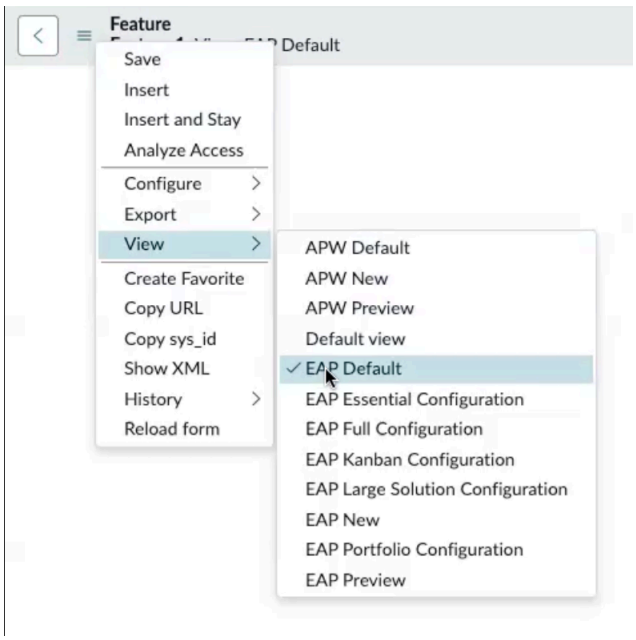
Before you begin

- This is a one time activity to enable and view the monetary benefit plans and non-monetary benefit plans related list for all the planning items.
- Role required: admin

Procedure

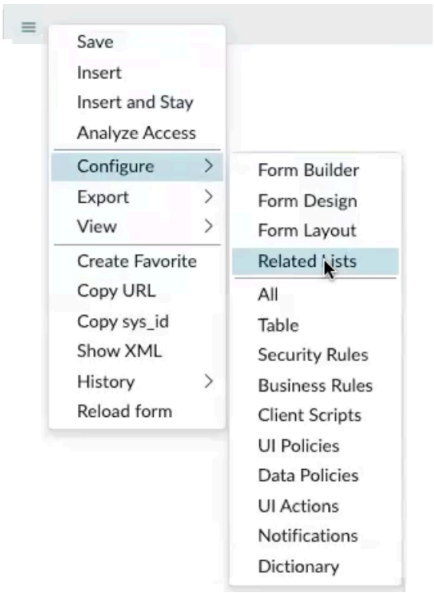
1. Navigate to **All** > **System Definition** > **Tables**.
2. Filter the Label field to locate a planning item type.
3. Select the **Show List** related link.
4. Open a record from the list of Features or Capabilities.
5. Change the scope of the application if you do not see the editable form of the record page.
6. Change the record page view to **EAP Default**.

   To change the view, select **Additional actions** menu ( ), select **View**, and select the **EAP Default** view.



7. Select **Additional actions** menu ( ), select **Configure**, and select the **Related Lists** option.

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8. Select **Monetary Benefit Plans** and **Non-monetary Benefit Plans** from the Available list and add them to Selected list.
9. Select **Save**.
10. Select **Update** on the planning item record page.

What to do next

Create and manage monetary and non-monetary benefits plans for your planning items.

- Manage monetary benefit plans for your planning items in Portfolio Planning
- Manage non-monetary benefit plans for your planning items in Portfolio Planning

Enable financial budget allocation for planning items in Portfolio Planning

Enable allocation property after migrating to Next Experience to work on budget allocation for your planning items using Portfolio Planning.

Before you begin

- For new customers accessing financials in Next Experience, this property is enabled by default.
- Role required: admin

Procedure

1. Navigate to **All** > **System Properties** > **Properties**.
2. Filter the Name column to locate and open **sn_invst_pln.enable_budget_allocation_v2** property.
3. Update the Value field to **True** and select **Update**.

What to do next

Configure budget attributes to work on managing budget of your planning items. For more information, see Configure budget attribute at instance-level to allocate budget.

Configure budget attribute at instance-level to allocate budget

Configure the budget attribute by expense type or cost type as an instance-level to work on budget allocations for your planning items using Portfolio Planning.

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Before you begin

- Enable the budget allocation property to work on budgeting for planning items. For more information, see Enable financial budget allocation for planning items in Portfolio Planning.
- Role required: admin

Important:
Existing customers cannot change the budget attribute to cost_type.

Procedure

1. Navigate to **All** > **System Properties** > **Properties**.
2. Filter the Name column to locate and open **sn_invst_pln.budget_allocation_attribute** property.
3. Update the Value field to one of the following.
   - **cost_type** - view financials by cost types such as Hardware Opex, External labor Capex, Software Capex, Software Opex, and so on.
   - **expense_type** - view financials by expense types such as Capex and Opex.
4. Select **Update**.

Customise cost plan form

Manage the fields required on the new cost plan form as per your organization needs.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Filter the Label field to locate and open the **Cost Plan** table.
3. Select the **Design Form** related link.
4. On the header row, select **Cost Plan [cost_plan]** from the table list and **Financials View** from the view list.
5. On the form, you can:
   - Drag and drop the required fields from the Fields column.
   - Remove the existing fields using the Remove field icon.
6. Select **Save**.

Change the default expense type in Portfolio Planning

Configure the default expense type to create or edit cost plans for your planning items.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Properties** > **All properties**.
2. Filter the name to locate and open the **sn_plng_att_core.default.expense_type** table.
3. Change the Value field to the required expense type and select **Save**.
   Opex is the default value.

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Create custom labor costs and map them to sys_id

Create and map custom labor costs to sys_id to generate labor costs based on the relevant expenses.

Before you begin
Role required: admin

Procedure

1. Create custom labor costs.
   a. Navigate to **All** > **System Definition** > **Tables**.
   b. Filter the Label field to locate the open **Cost Type Definition**.
   c. From the Related Links, select **Show List**.

      List of OOB labor costs is displayed.

   d. Select **New**.
   e. On the Cost Type Definition form, fill the fields.
      - **Name** - enter the name of the labor cost plan.

        Tip:
        Adding the cost type, either capex or opex, as a suffix to the name helps you to easily identify while creating cost plans.

      - **Expense type** - select Capex or Opex from the list to define expense.

      For example, you can create Software Capex labor cost to capture software purchasing expenses. Hardware Opex labor cost to capture your hardware purchasing expenses.

   f. Click **Submit**.

      The new cost plan is displayed on the list.

   g. Right-click on the cost plan row and select **Copy sys_id**.
2. Map the custom labor costs with sys_id.
   a. Navigate to **All** > **System Properties** > **All properties**.
   b. Filter the name field to locate and open the **sn_plng_att_core.labor_costtype_sysid_mapping** property.
   c. In the Value field, enter the labor cost type name and it's sys_id in the same format as the OOB labor costs mapping format.
   d. Select **Update**.

Activate a scheduled job to manage the expense type on resource assignments

Activate and define a scheduled job to manage expense type of resource assignments created for demands, projects, and project tasks.

Before you begin
Role required: admin

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Procedure

1. Navigate to **All** > **System Scheduler** > **Scheduled Jobs** > **Scheduled Jobs**.
2. Filter the name field to locate and open **Migrate task type planning attributes from tasks**.
3. Select **Active** option to activate and schedule the job.
4. Edit the fields on the Scheduled Script Execution form to customize the job and meet your requirements.
   For more information about the field description and scripts, see Automatically run a script of your choosing.
5. Select **Execute Now** to execute the scheduled job or select **Update** to save your changes.

Activate a scheduled job to migrate budget of your planning items

Activate the **Migrate budget for active demands and projects** scheduled job to migrate budget of active planning items from Classic UI to Next Experience.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Filter the name field to locate and open **Migrate budget for active demands and projects**.
3. Edit the fields on the Scheduled Script Execution form to customize the job and meet your requirements.
   For more information about the field description and scripts, see Automatically run a script of your choosing.
4. Select **Execute Now** to execute the scheduled job or select **Update** to save your changes.

Activate a scheduled job to create financial baselines for your projects and demands

Define a scheduled job to automatically create financial baselines for your planning items at a required cadence.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Filter the name field to locate and open **Create Financial Baseline For active Demands and Projects**.
3. Select **Active** option to activate and schedule the job.
4. Edit the fields on the Scheduled Script Execution form to customize the job and meet your requirements.
   For more information about the field description and scripts, see Automatically run a script of your choosing.
5. Select **Execute Now** to execute the scheduled job or select **Update** to save your changes.

Activate a scheduled job to generate labor costs for your projects and demands

Activate a scheduler job to automatically create labor costs for attribute-based resource assignments.

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Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Filter the name field to locate the *Generate Labor Costs* scheduled job and open it.
3. Select **Active** and on the Scheduled Script Execution form, fill the fields.
   For a description of the field names, see Scheduled Script Execution form to generate labor costs for projects and demands.
4. Select **Update** to save your changes or **Execute Now** to run the scheduled job.

Configure portfolio financials in Portfolio Planning

Configuration details for properties and scheduled jobs to view and manage portfolio financials in Portfolio Planning

Before you begin
Role required: admin

Procedure

1. Enable integration for an internal planning item type.
   For more information, see Enable integration for internal planning item.
2. Activate the investment entities for Demands and Projects.
   For more information, see Activate investment entities for planning items.
3. Enable the roll up system property to true to view financials.
   For more information, see Activate rollup property for projects to view portfolio financials.
4. Activate the data generation scheduled job to view portfolio financials.
   For more information, see Activate a scheduled job to generate data to view portfolio financials.

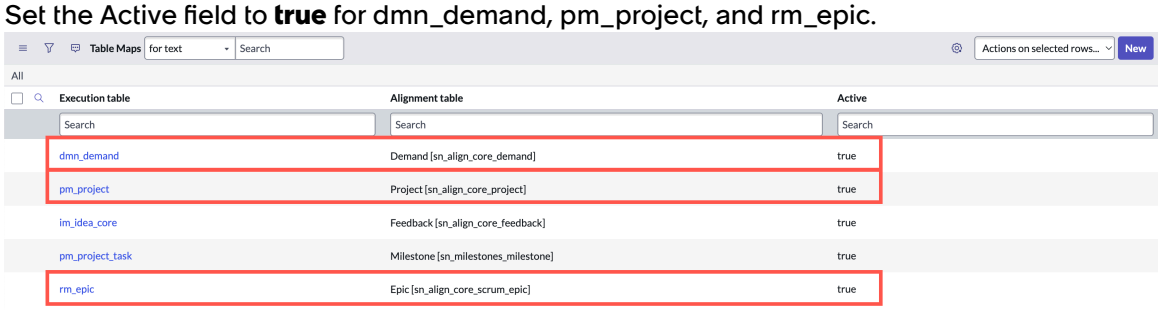
Enable integration for internal planning item

Enable the integration for an internal planning item type to view portfolio financials.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Filter the name field to locate and open the **Table Map** [sn_align_cmn_int_table_map] table.
3. Select the **Show List** Related Link.
4. Set the Active field to **true** for dmn_demand, pm_project, and rm_epic.



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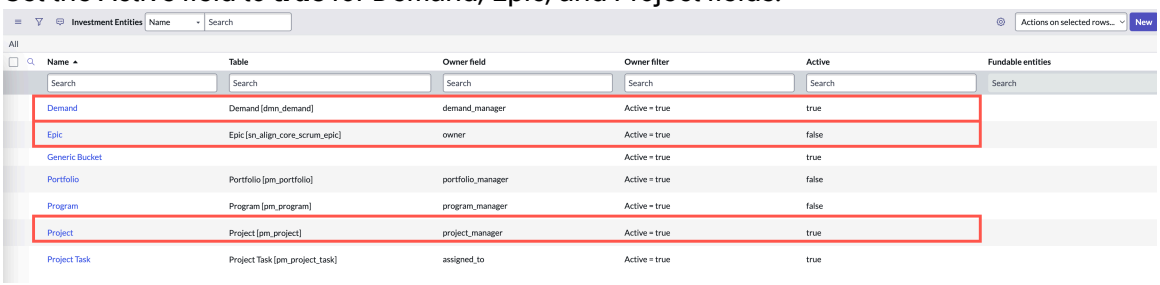
Activate investment entities for planning items

Activate the investment entitied for Demands, Projects, and Epics to view portfolio financials.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Filter the name field to locate and open the **Investment Entity** [sn_invst_pln_invst_funding_entity] table.
3. Select the **Show List** Related Link.
4. Set the Active field to **true** for Demand, Epic, and Project fields.



Activate rollup property for projects to view portfolio financials

Activate project cost rollup property to view the rolled up costs of top projects in portfolio financials.

About this task
Financial fields such as planned costs, forecasts, actual costs are rolled up from sub-projects to top projects upon setting this property to true.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Properties** > **All Properties**.
2. Filter the name field and select the **com.snc.project.rollup.cost** property.
3. Enter **true** in the Value field and select **Update**.

Activate a scheduled job to generate data to view portfolio financials

Activate and define **Data generation for financials in SPW/PPW** scheduled job to migrate budget from old data model to new data model and view portfolio financials.

About this task
It is a one-time activity to define and run this scheduled job to view portfolio financials.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Filter the name field to locate and open **Data generation for financials in SPW/PPW**.

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3. Select Active option to activate and schedule the job.
4. Edit the fields on the Scheduled Script Execution form to customize the job and meet your requirements.

   For more information about the field description and scripts, see Automatically run a script of your choosing.
5. Select **Execute Now** to execute the scheduled job.

Result
All the required mappings to view the portfolio financials for Epics, Demands, and Projects are mapped.

To validate if the data generation job is successful, navigate to **All** > **System Definition** > **Tables** and check the mappings for **Investment** record in the **Project** [sn_align_core_project] table.

Configuring Portfolio Planning with PPM

Understand the process required to set up Portfolio Planning to work with ServiceNow® Project Portfolio Management.

Configuration workflow

Use the following steps as guidelines for your Portfolio Planning with Project Portfolio Management (PPM) setup process. Some of these steps require the admin role (sn_align_core.apw_admin) and some require the user role (sn_align_core.apw_user).

1. Create an alignment integration.
2. Generate default mapping configurations.
3. Create custom mapping configurations.

Guided Setup

After installing Portfolio Planning, you can use the guided setup to help you with the required configuration. To open the guided setup, navigate to **Portfolio Planning** > **Guided Setup**.

Create an alignment integration

Internal alignment integration synchronizes internal processes and data to support Strategic Portfolio Management, confirming that planning and execution are aligned with business objectives through real-time bi-directional synchronization with applications such as Project Portfolio Management, Agile Development 2.0, and Scaled Agile Framework (SAFe).

About this task
After you have Portfolio Planning installed, the **ServiceNow Internal** Alignment integration is created by default. In case the alignment integration isn't available, you can create your alignment integration type.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Portfolio Planning** > **Integrations**.
2. Verify if the **Servicenow Internal** alignment integration exists.
3. If not, click **New** to create an alignment integration.

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4. In the **Name** field, enter a name for the alignment integration (For example, `ServiceNow Internal`).
   Alternatively, you can also click **Create ServiceNow Internal Integration** from the related links to create an internal alignment integration.
5. Click **Submit**.

Generate default mapping configurations

Generate default mapping configurations to create table maps for Project Portfolio Management (PPM).

Before you begin
Role required: sn_align_core_apw.admin

Procedure
1. Navigate to **All** > **Portfolio Planning** > **Integrations**.
2. Click **ServiceNow Internal** to view the alignment integrations for the internal applications.
3. Click **Generate Default Mapping Configurations** to create the table maps for projects and demands.

> **Note:**
> Mapping configurations consist of table, field, and choice maps.

Create custom mapping configurations

Create mapping configurations for planning items that are not created by default such as features, stories, etc.

As an admin, you can choose to create table maps, field maps, and choice maps for the planning items that are not created by default. For more information, see:

1. Create a table map.
2. Create a field map.
3. Create a choice map.

Create a table map

Create a table map to define the mapping between tables in Portfolio Planning with the tables in Project Portfolio Management (PPM).

Before you begin
Role required: sn_align_core.apw_admin

Procedure
1. Navigate to **All** > **Portfolio Planning** > **Integrations**.
2. Select **ServiceNow Internal**.
3. Create a new table map by selecting **New** in the **Table maps** tab.
4. In the Table map form, fill in the fields.
5. Select **Submit**.

Result
A new table map is created with your alignment and execution table configurations.

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Note:
To create or update a table map for a planning item type other than demand or project, the SPM Pro license is required. Contact your administrator for more details.

What to do next
Create a business rule to support export of this new table map configuration to PPM. For more information, see Create a business rule to apply a custom table map configuration.

Create a business rule to apply a custom table map configuration

Create a business rule to enable import for your new custom table map configuration from and Project Portfolio Management (PPM) application.

Before you begin
Role required: sn_align_core_apw.admin

About this task
After you create a custom table map in Portfolio Planning integrations, create a business rule similar to 'Sync Data from Execution to Alignment' business rule in the rm_epic or dmn_demand tables.

Note:
Ensure that the business rule is created in the execution application, PPM.

Procedure
1. Navigate to **All** > **System Definition** > **Business Rules**.
2. From the list of available business rules, locate and open the Sync Data from Execution to Alignment rule.
3. From the context menu (☰), perform an Insert and Stay operation on this business rule.
   If you have not enabled the **Insert and Stay** action in your ServiceNow instance, see Allow insert options on records.
4. On the business rule form, edit the following fields.

Business rule form

Field	Description
Name	Unique name for the business rule. For example, if your new table map is to map demands, name this rule as Sync Demands with Portfolio Planning.
Table	Select the table for which you've created the custom map. For example, Feature [sn_safe_feature].

5. Click **Update**.

Create a field map

Map the fields for each table map from Portfolio Planning to Project Portfolio Management and vice-versa.

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Before you begin

Ensure that you have created a table map for an alignment integration record. For more information, see Create a table map.

Note:
If the execution field type is 'Reference' and the alignment field type is 'String', then the sync will not work.

Role required: sn_align_core.apw_admin

Procedure

1. Navigate to **All** > **Portfolio Planning** > **Integrations**.
2. Select **ServiceNow Internal.**
3. In the **Table Maps** related list, select the table map for which you want to create a field map.
4. Create a new field map by selecting **New** in the Field Maps tab.
5. In the Field map form, fill in the fields.
6. Click **Submit**.

Create a choice map

Map the choice list for each field map for fields with a list of values from Portfolio Planning to Project Portfolio Management and vice-versa.

Before you begin

Ensure that you have created a field map and it contains choice fields with a list of values. For more information, see Create a field map.

Role required: sn_align_core.apw_admin

Procedure

1. Navigate to **All** > **Portfolio Planning** > **Integrations**.
2. Select **ServiceNow Internal**.
3. In the **Table Maps** related list, select the table map which has the fields for which you want to create a choice map.
4. In the **Field Maps** related list, select a relevant field map for which you want to create a choice map.
5. Create a new choice map by selecting **New** in the Choice Maps tab.
6. In the Choice map form, fill in the fields.
7. Click **Submit**.

Configure bulk import

This system property enables you to update the bulk import functionality in Portfolio Planning with PPM.

Before you begin

Role required: sn_align_core.apw_admin

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Procedure

1. Enter `sys_properties.list` in the navigation filter.
2. Search for *com.sn_align_cmn_int.bulk_import*.
3. Set the property value to either of the following options.
   When the records are imported from PPM to Portfolio Planning, only the last comment will be imported.

Managing portfolio plans in Portfolio Planning

Create personalized portfolio plans in Portfolio Planning Workspace and enable focused planning of work in the desired perspective (lens) to align with business objectives.

The following sections guide you on creating, updating, sharing, and collaborating with portfolio plans in Portfolio Planning Workspace.

For details on how to use roadmaps for your portfolio plans, see Planning roadmaps in Portfolio Planning.

Create a high-level portfolio plan

Build a portfolio plan for high-level items (programs) in the Portfolio Planning Workspace so that you can prioritize, roadmap, and manage work aligned to these programs.

Before you begin
Role required: sn_align_core.apw_user or business_stakeholder

About this task
You can create high-level planning only for Program (pm_program) planning items and is supported by the Project Program lens.

In this task, select the Project Program lens, add conditions to filter the planning item data that you need, and enter additional details to build a portfolio plan.

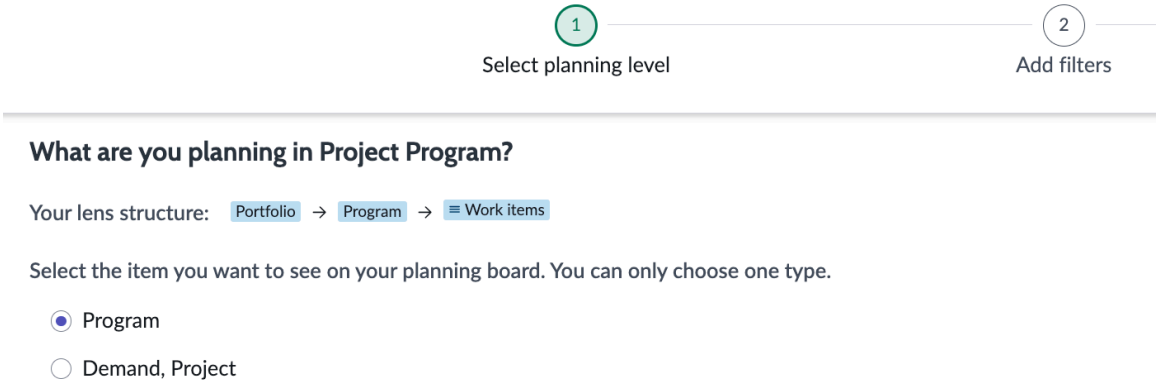
Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning**.
2. From the Portfolio Plans page, select **New**.
   If there are no existing portfolio plans, select **Create your first portfolio plan**.
3. Select **Project Program** lens for your high-level planning.
   The Create portfolio plan wizard is shown.
4. For the lens, select **Programs** as work items for planning.

   a. For the lens, select work that you want to plan.

      For example, you want to manage work for programs in your company. Select Programs as your high-level planning item. This enables you to plan for programs and review the work aligned to these programs.

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b. Add conditions to further filter the data of your planning items.

For example, you are responsible for the programs of the Customer Support department. You can set a condition to filter programs of only the Customer Support department from the Program table.

You can also add multiple conditions to help you set a complex filter and add the right kind of data to your portfolio plan.

c. Fill in the details of the portfolio plan.

Provide the information of the portfolio plan's name, owner, start and end dates, and description.

Use the **Previous** and **Next** buttons to navigate between the steps.

5. Select **Create**.

Result

The portfolio plan is created and the page is refreshed to show the Planning page. You can view the list of all portfolio plans that you own or shared with you from the Home page.

What to do next

Analyze the backlog and prioritize work for your portfolio plan. See Prioritizing portfolio plan work in Portfolio Planning.

Create a portfolio plan

Use lens and build a personalized portfolio plan in Portfolio Planning Workspace so that you can start to prioritize and align work in the planning perspective of your choice.

Before you begin

Role required: sn_align_core.apw_user or business_stakeholder

Procedure

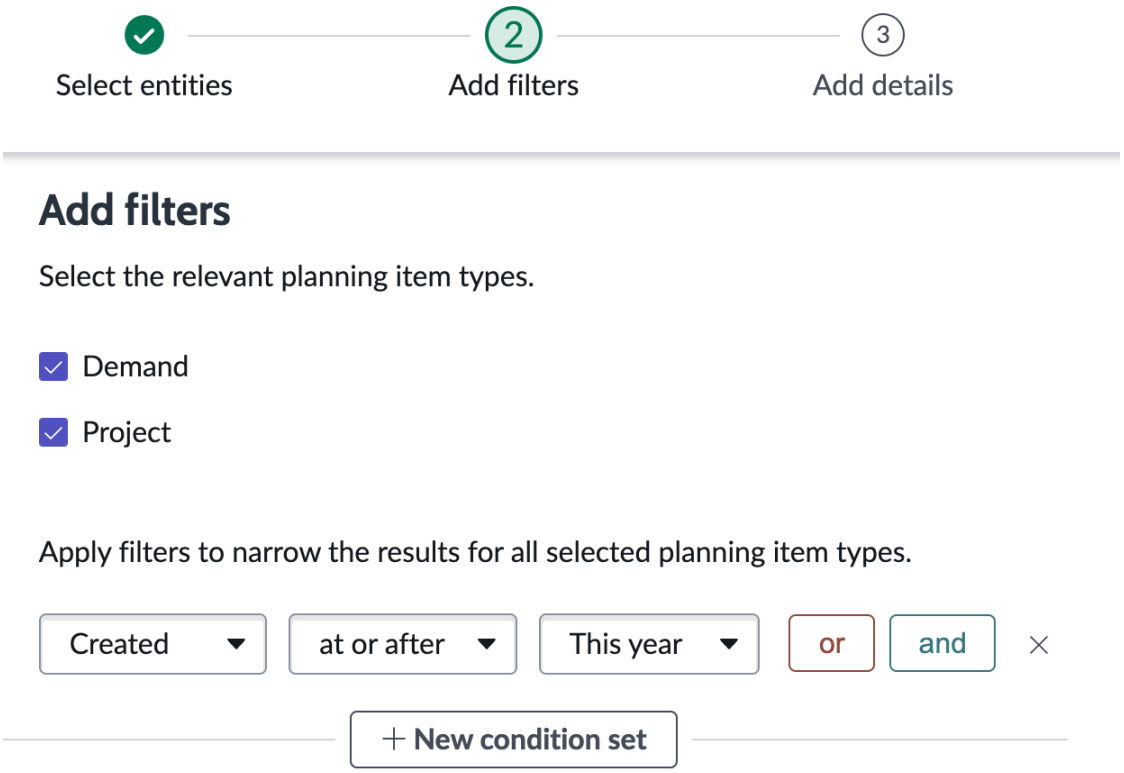
1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning**.
2. Select **New**.
   If there are no portfolio plans existing, select **Create your first portfolio plan**.
   The Create Portfolio plan wizard is shown.
3. Make your selections by using the Create Portfolio plan wizard.

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a. Select a lens.

b. For the selected lens, choose the entity type and the desired entities of that type.

The entity type represents the perspective that you plan your work in. For example, if you've chosen the Organization lens, you can select Business Unit as your entity type, and then select the required business units, to plan work from their perspective.



You can also add multiple conditions to help you set a complex filter and add the right kind of data to your portfolio plan.

c. Select the type of planning items that you want to include in your portfolio plan.

You can further filter the planning item data with additional conditions.

d. Fill in the details of the portfolio plan.

Provide the information of the portfolio plan's name, start and end dates, and description.

You can use the **Previous** and **Next** buttons to navigate between the steps.

4. Select **Create**.

Result

The portfolio plan is created and the page is refreshed to show the Planning page for this new portfolio plan. You can view the list of all portfolio plans that you own or shared with you from the Home page.

Planning items that meet the following criteria appear in the portfolio plan:

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- Planning items that belong to one of the entity types selected in Step 3(b)
- Planning items that match the planning item types selected in Step 3(c)
- Planning items with an approved start date or an end date that falls within the portfolio plan timeline
- Planning items that don't have both Approved start and Approved end dates

Note:
If any demands were converted into projects in Project Portfolio Management, only the resulting project planning items (converted from demands) appear in the portfolio plan.

What to do next

- Analyze the backlog and prioritize work for your portfolio plan. See Prioritizing portfolio plan work in Portfolio Planning.
- Roadmap the prioritized work to visualize and track progress of your plans. See Planning roadmaps in Portfolio Planning.
- Modify a portfolio plan in Portfolio Planning Workspace.
- Show or hide features for your portfolio plan according to your requirement while sharing a portfolio plan with your stakeholders. See, Show or hide the features for a portfolio plan.
- Share portfolio plans in Portfolio Planning Workspace.

Create a copy of an existing portfolio plan in Portfolio Planning Workspace

Create a portfolio plan with the data of an existing portfolio plan. If the portfolio plan you want to create is similar to an existing portfolio plan, copying the existing portfolio plan saves your time. You can also copy portfolio plans that were shared with you either with view or edit access.

Before you begin

Role required: sn_align_core.apw_user or business_stakeholder

About this task

The **Duplicate portfolio plan** option copies the selected portfolio plan with its all data (Prioritization and Roadmap) into the portfolio plan. It also preserves all dependencies and relationships among the copied items and their child items.

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one.
3. From the portfolio plan header, select the More actions icon (⋮) and then select **Duplicate portfolio plan**.
4. On the Duplicate portfolio plan window, fill the details.

   a. Enter a name for the portfolio plan in the **Portfolio plan name** field.
   By default, the name is *ABC (Copy)* where ABC is the name of the portfolio plan you copied from.

   b. **Optional:** Select **Share with same users and groups** option to grant access to the users of the portfolio plan you copied from.

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The action grants the same read and edit access as is the users had for the portfolio plan you copied from.

c. Select **Confirm**.

Result
The new portfolio plan is created and a link is generated on the screen to access the new portfolio plan.

What to do next
- Analyze the backlog and prioritize work for your portfolio plan. See Prioritizing portfolio plan work in Portfolio Planning.
- Roadmap the prioritized work to visualize and track progress of your plans. See Planning roadmaps in Portfolio Planning.
- Modify a portfolio plan in Portfolio Planning Workspace.
- Show or hide features for your portfolio plan according to your requirement while sharing a portfolio plan with your stakeholders. See, Show or hide the features for a portfolio plan.
- Share portfolio plans in Portfolio Planning Workspace.

Modify a portfolio plan in Portfolio Planning Workspace

Update the details of a portfolio plan in Portfolio Planning Workspace or delete it, to reflect the changes in your planning priorities.

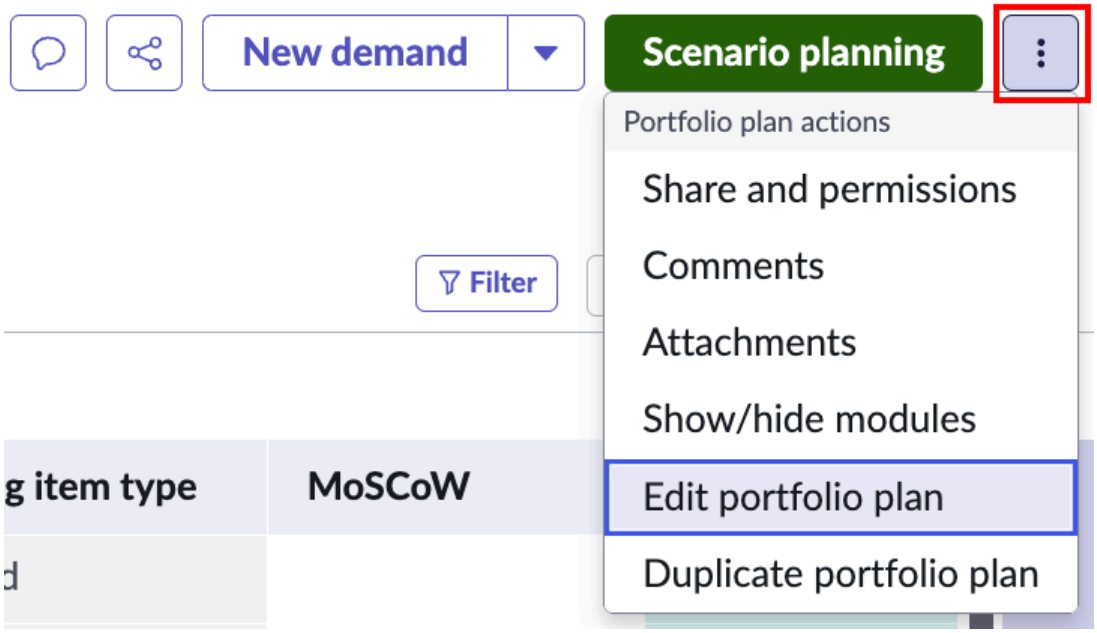
Before you begin
Create a portfolio plan.

Role required: sn_align_core.apw_user or business_stakeholder

About this task
Note:
Only the owner or editors of a portfolio plan can modify it.

Procedure
1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one.
3. From the portfolio plan header, select the More actions icon ( ).

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4. Update the details of the portfolio plan or delete it using the Portfolio plan actions menu.

What to do next

Share your updated portfolio plan or collaborate with other stakeholders.

- Show or hide features for your portfolio plan according to your requirement while sharing a portfolio plan with your stakeholders. See, Show or hide the features for a portfolio plan.
- Share portfolio plans in Portfolio Planning Workspace.
- Collaborate on portfolio plans in Portfolio Planning Workspace.

Show or hide the features for a portfolio plan

As a portfolio manager, show or hide the features (for example, Prioritization, Roadmap, and so on) for your portfolio plan as needed so that you can share only the required data with your stakeholders.

About this task

Hiding features for your portfolio plan helps you share only the data that matters to your stakeholders and restrict access to the other data in your portfolio plan.

Note:
When you share a portfolio plan with your stake holder providing view access and hiding a feature (for example, Capacity Planning), the viewer can only view the enabled features and can't see the hidden feature (Capacity Planning) in the shared portfolio plan. However, when you share a portfolio plan providing edit access, the editor can enable or hide the features as required and can view and edit any data in the shared portfolio plan.

Before you begin

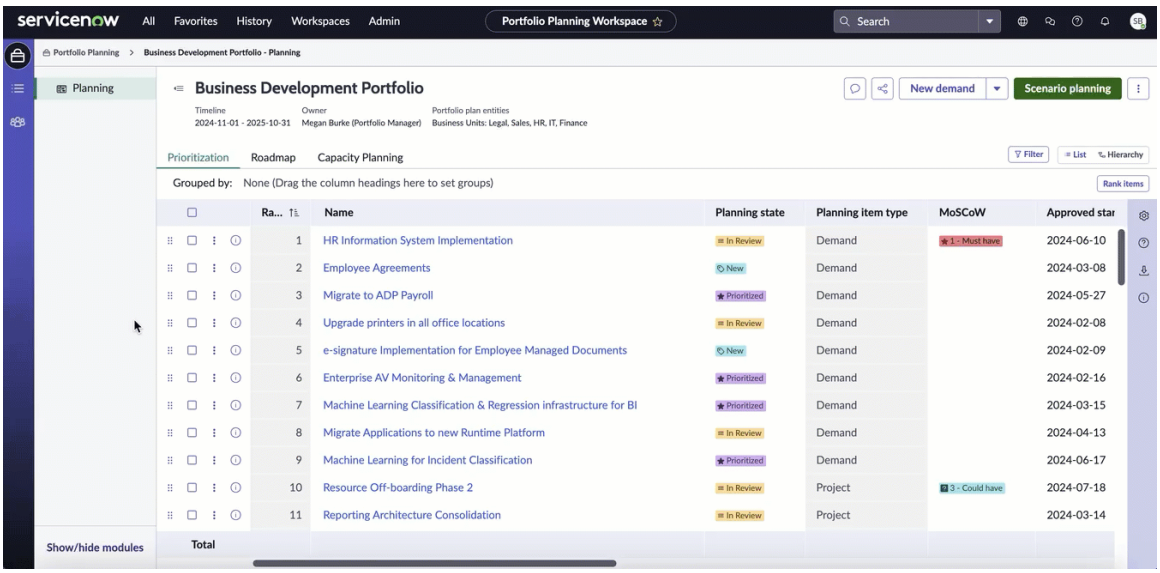
Create a portfolio plan.

Role required: sn_align_core.apw_user or business_stakeholder

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Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select the portfolio plan for which you want to show or hide the features.
3. From the left pane of the portfolio plan, select **Show/hide modules**.
4. On the Show/hide modules window, select the features that you want to show and deselect the features that you want to hide.



5. Select **Apply changes**.

Related topics

Share portfolio plans in Portfolio Planning Workspace

Share portfolio plans in Portfolio Planning Workspace

Share your portfolio plan with stakeholders and other planning managers so that they have visibility into the plan's progress and start collaborating.

Before you begin

- Create a portfolio plan.
- Users or groups that you want to share the portfolio plan with must have the sn_align_core.ap_read_only or sn_align_core.apw_user role to get the read or edit access to the portfolio plan respectively.

Role required: sn_align_core.apw_user or business_stakeholder

About this task

Select individual users or groups to share the portfolio with.

When you share a portfolio plan with an individual user or a group, they can access the entire portfolio plan, which includes Prioritization and Roadmap. Also, they can access the Capacity tab in the Planning page if the user has the sn_align_ws.spw_capacity_user or sn_align_ws.spw_capacity_read role.

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Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one.
3. From the portfolio plan header in the Planning page, select the **Share portfolio plan** icon ( ).
4. On the Share portfolio plan form, select users to share the portfolio plan with and set their access appropriately.
   a. In the **Members or Groups** field, enter the names of individual users or groups.
   b. From the **Access** field, select the access level as **Viewer** or **Editor** for the selected names.
      - An editor can view and change the portfolio plan's settings and data.
      - A viewer can only comment or add attachments. They can't change any settings or data.

      Note:
      Even if a user is granted view-only access to a portfolio plan, they can still edit planning item tables or any associated tables used in the portfolio plan if they have the sn_align_core.apw_user role assigned.
5. Select **Send invite**.

Result
The selected individual and group users are notified of the portfolio plan sharing through an email.

What to do next
Collaborate on portfolio plans in Portfolio Planning Workspace.

You can change the access level or remove access for a user or a group.

1. On the Share portfolio plan form, select **Manage access**.
2. From the user or group card, select the Action Menu icon ( ).
3. Select the right access level or select **Remove**.

Related topics
Modify a portfolio plan in Portfolio Planning Workspace

Show or hide the features for a portfolio plan

Collaborate on portfolio plans in Portfolio Planning Workspace

Add comments and attachments to your portfolio plan so that users can review and share their feedback. Collaborate with stakeholders and drive shared outcomes.

Before you begin
Create a portfolio plan.

Role required: sn_align_core.apw_user or business_stakeholder

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About this task

Comment on plans and data points, share attachments, and provide feedback from a single place in the workspace to ensure all the stakeholders are in alignment with the business priorities.

The attachments and comments that you add from the portfolio plan's header, they apply to the entire portfolio plan, which includes Prioritization and Roadmap.

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. From the portfolio plan header in the Planning page, select the **Comments** icon ( ).
4. Add comments or attachments to the portfolio plan.

Related topics

Show or hide the features for a portfolio plan

Prioritizing portfolio plan work in Portfolio Planning

Use the Prioritization feature of the Portfolio Planning Workspace to add, update, and rank planning items so that you can prioritize the right work for the right time.

Prioritization views

Prioritization page in Portfolio Planning represents your backlog, showing the items of your work pipeline in a list and hierarchy views. See Work prioritization in Portfolio Planning for an overview of these views.

Note:
The Prioritization feature is available only for portfolio plans.

Prioritization features

In each of these views on the Prioritization page, you can perform the following actions:

Add new planning items

Add new items to your backlog directly from the Prioritization page. The type of planning items that you can create here depends on your portfolio plan configuration. See Add planning items to Prioritization page in Portfolio Planning Workspace.

Update planning item details

You can edit details of the planning items, add attachments, and collaborate on them with the stakeholders directly from the Prioritization page views to enable smoother real-time backlog grooming.

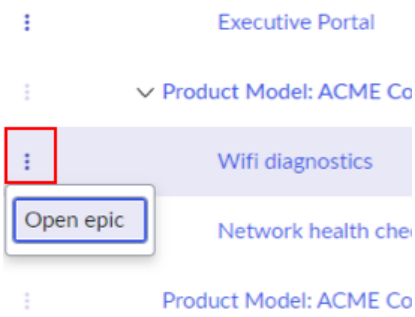
See Update planning item details from Prioritization view.

Open the planning item in the Execution app

If you're using ServiceNow PPM, Agile Development 2.0, or SAFe applications to execute the planned work, you can open the planning items in their own application. For example, if your planning item is a project, you can navigate to the

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project form, project planning console, or project status report directly from the Prioritization page.



Personalize the Prioritization page view

Change the way that the Prioritization page is displayed so that you can view the information in the format that you need. See Personalizing Prioritization page views in Portfolio Planning Workspace.

All settings, such as row and column personalization, grouping, and sorting, are saved as the portfolio plan preferences. So, these settings are applied to all the users or user groups that the portfolio plan is shared with.

Add planning items to Prioritization page in Portfolio Planning Workspace

Add new planning items to your portfolio plan's work backlog in Portfolio Planning Workspace and ensure that the work pipeline is current.

Before you begin

Create a portfolio plan.

Role required: sn_align_core.apw_user

About this task

Use the Prioritization page of your portfolio plan to add new planning items or import them from other ServiceNow execution system such as Project Portfolio Management (PPM).

You can use the List or Hierarchy views while you perform this task.

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. From the Prioritization page, add a new planning item for your portfolio plan.

   Use the More options drop-down to select the planning item that you want to create.

4. On the form, fill in the short description and approved dates.
   For full field information, see Demand planning item form or Project planning item form.
5. Select **Submit**.

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6. **Optional:** If you're using PPM to execute the planned work, you can also import your work items from the application.
   For more information, see Executing Portfolio Planning work in PPM.

Result

The new item is created with its **Planning state** field is set to **New** and the position of the item is based on the view that you are in.

- List view: Added to the bottom of the list.
- Hierarchy view: Added to the appropriate grouping. For example, your selected lens is Organization. Then, the new item is added to the grouping of its department.

What to do next

- Rank planning items in Portfolio Planning Workspace.
- Update planning item details from Prioritization view.

Create a copy of an existing planning item in Portfolio Planning Workspace

Create a copy of an existing planning item to add it to your portfolio plan's work backlog in Portfolio Planning Workspace and ensure that the work pipeline is current. If the planning item you want to create is similar to an existing planning item, copying the existing planning item saves your time.

Before you begin

Create a portfolio plan.

Role required: sn_align_core.apw_user

About this task

Use the Prioritization page of your portfolio plan to add new planning items or import them from other ServiceNow execution system such as Project Portfolio Management (PPM).

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. From the Prioritization page, select **List** view.
4. Select the More actions icon (⋮) of the planning item that you want to copy and then select **Duplicate**.
   The new planning item is created and the item appears right below the planning item you copied from. Also, the rank is updated for the new planning item automatically based on the rank of the planning item you copied from.

   By default, the name is *Copy of ABC* where ABC is the name of the planning item you copied from.
5. **Optional:** If you're using PPM to execute the planned work, you can also import your work items from the application.
   For more information, see Executing Portfolio Planning work in PPM.

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What to do next

- Rank planning items in Portfolio Planning Workspace.
- Update planning item details from Prioritization view.
- Personalizing Prioritization page views in Portfolio Planning Workspace.

Update planning item details from Prioritization view

Update the details of your planning items or delete them so that the Prioritization page in Portfolio Planning Workspace reflects the latest work pipeline.

Before you begin

Role required: sn_align_core.apw_user

About this task

Update the details of a planning item using the List and Hierarchy views in the portfolio Prioritization page. Edit the details inline from the grid view to facilitate smoother real-time backlog grooming. Use the full details page of the planning item to add attachments and collaborate on them with the stakeholders.

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. From the Prioritization page, select **List** or **Hierarchy** view.
4. Update item details, attach files to the item, or delete the item.

   Information of certain columns that aren't editable in the full details page, can't be edited inline too. For example, planned cost and planned benefit. These cells are visually differentiated using grey color as their background.

   If you group the Prioritization items list by any attribute, you can't edit the short description of the items directly from the grid view.

Rank planning items in Portfolio Planning Workspace

Rank the planning items that are added to the pipeline of your portfolio plan and decide on their priority so that you can start planning your portfolio roadmap.

Before you begin

- Create a portfolio plan.
- Ensure that the planning items in the Prioritization page are sorted by the Rank column in ascending order.

Role required: sn_align_core.apw_user

About this task

Use the List view to stack-rank the planning items of your portfolio plan.

Within the ServiceNow system, all the planning items are assigned a global rank. Reorder the items in the Prioritization page to change their rank and update their planning state. If you decide to include a planning item into your roadmap schedule, mark its Planning State as **Prioritized** to add it to the roadmap directly from the Prioritization page.

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The Rank column helps you quickly identify the rank of an item relative to the other items in the backlog. This information is useful to determine the top-ranked items from a long list of planning items. When there's no custom grouping or sorting, the planning items are sorted by their rank, and you can reorder the rows.

Note:
Reordering of rows is not allowed if the planning items are already grouped or sorted by any other attribute. Remove the grouping or sorting to reorder rows.

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. From the **List** view, Rank the planning items according to your priority by rearranging their order.

   Repeat this step until the ranking of the planning items align with your business priorities. To get better visibility of data that you need:

   - Sort or group the list by the required columns. See Personalize Prioritization List view in Portfolio Planning Workspace.
   - Filter the planning items. See Apply quick filters for Prioritization and Roadmap data in Portfolio Planning.

Tip:

Using the Row context menu ( ), you can also assign the highest and lowest ranks to the planning items using the **Move to top** and **Move to bottom** options respectively.

Result
The rank of the item is automatically updated and can be seen from the Rank column. The Rank column is read-only.

Prioritize work

Review and prioritize the items of your portfolio plan pipeline to add them to the plan's roadmap so that your teams can start working on them.

Before you begin

- Create a portfolio plan.
- Ensure that the planning items in the Prioritization page are sorted by the Rank column in ascending order.

Role required: sn_align_core.apw_user

About this task
Review and prioritize the items in the Prioritization or Hierarchy tab views during your grooming sessions. You can use the MoSCoW values assigned to an item to help you decide the priority of work.

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.

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3. From the Prioritization or Hierarchy tab, mark a planning item as In Review or Prioritized.

   Once you mark a planning item as **Prioritized**, it is automatically added to your portfolio roadmap, based on the values in the **Approved start date** and **Approved end date** fields.

   - If the dates fall within the portfolio planning period, then the item is displayed on the roadmap.
   - If either of the date fields is empty, then the item is added to the Unscheduled items list of the roadmap.

   Note:
   Your roadmap shows only those items that have Planning state set to **Prioritized**.

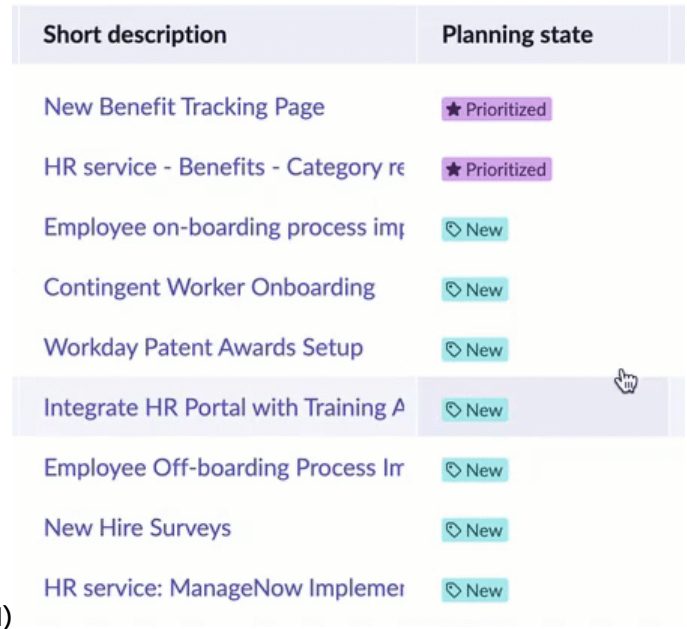
   If you've marked an item as **Done** or **Cancelled**, that item is not displayed on the Prioritization page by default. You can update the filter on the Planning state column to show the items that are completed or cancelled.

4. **Optional:** From the Prioritization tab, you can update the planning state of multiple items at once.

   a. Select the **Planning state** cell of one of the rows that you want to update.

   b. Press and hold the **Ctrl** key (for Windows OS) or **command** key (for Mac OS), and select the **Planning state** cells of the other rows that you want to update.

   c. Double-click one of the selected cells and choose a state.



(Optional)

Categorize and find work items using tags

Categorize your planning items based on your requirement by adding tags.

Before you begin

Create a portfolio plan.

Role required: sn_align_core.apw_user

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About this task

Tags enable you to categorize planning items. You create the tag name, which should name the reason for the tag. You can make the tags visible to everyone, some people, or just yourself. The visibility setting specifies who can use the tags to search for planning items.

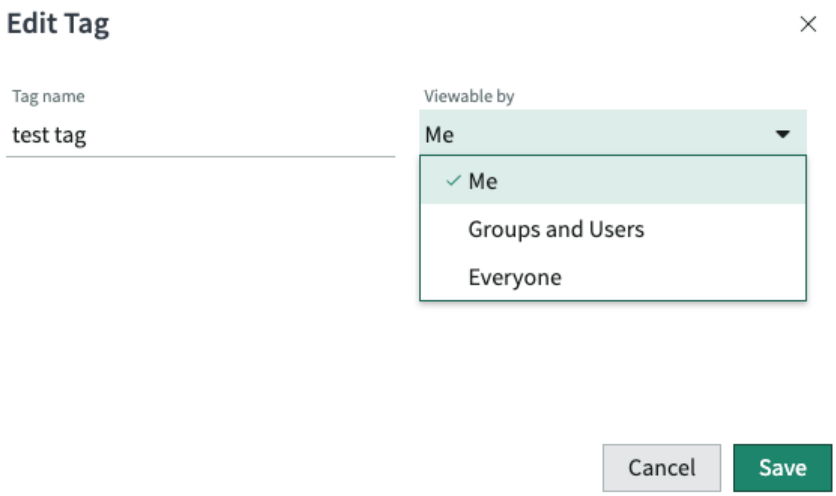
Any tagging additions or removals made to a planning item are automatically synced across all views in the Planning page and in the Scoring page. After tagging planning items, you can use the tags to search for planning items using the **Filter** option (Filter) in the List view of Prioritization and in the Scoring page.

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. From the List view of Prioritization, add a tag for a planning item using one of the following options.

> **Note:**
> The tag visibility setting defaults to private, which means the tag is only visible to the user who created the tag. So, only the user who created the tag can use the tag to search for planning items labeled with that tag.

4. To change the visibility setting of the tag, on the Details page of the planning item, select the tag and change the **Viewable by** setting.

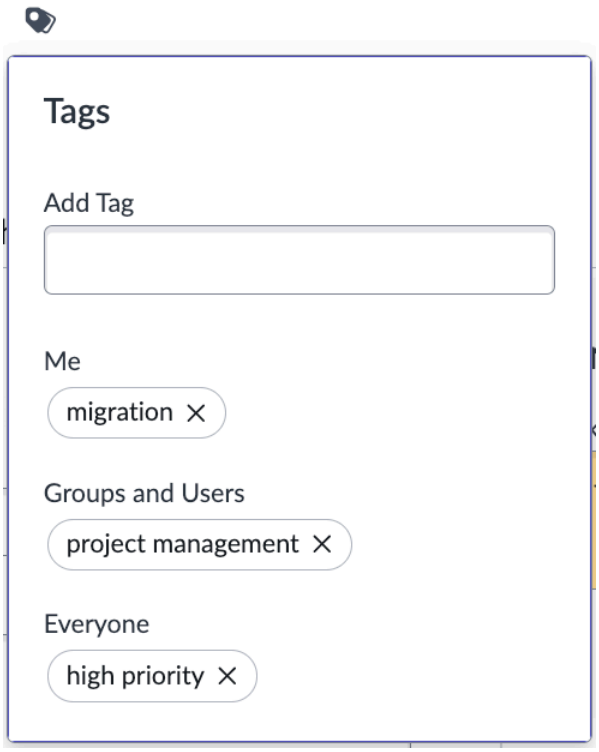


Option	Description
Me	Tag is visible only to the person who created the tag. Only the user who created the tag can use the tag to search for planning items la beled with that tag. This setting is the default.
Groups and Users	Tag is visible to specific groups or users. You can specify the groups and users who can view this tag.
Everyone	Tag is visible to everyone.

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Option	Description
	Note: This visibility setting is only available to an admin or tags_admin role.

A planning item can have multiple tags and each can have a different visibility setting.



5. To remove a tag from a planning item, double-click the cell in the Tag column on the List view or select the filled tag icon ( ) on the Details page of the planning item to open the list of tags, then select the **X** next to the tag you want to remove.

Personalizing Prioritization page views in Portfolio Planning Workspace

Personalize how the List and Hierarchy views on the Prioritization page in Portfolio Planning Workspace so that you can view the information that is most relevant to you and your stakeholders.

Personalize Prioritization List view in Portfolio Planning Workspace

Group and sort the planning items by the attributes of your choice, and customize the displayed columns to facilitate effective grooming.

Personalize Prioritization Hierarchy view in Portfolio Planning Workspace

Modify the views based on the lens to learn how work in the current portfolio plan relates to other lenses and gain better visibility into roll-ups of finances and schedules.

Personalize Prioritization List view in Portfolio Planning Workspace

Personalize the List view in the Prioritization page in the workspace so that you can view the information that is most relevant to you and your stakeholders.

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Before you begin

Create a portfolio plan

Role required: sn_align_core.apw_user

About this task

This task provides guidance on different options to personalize the List view of the Prioritization page.

Personalization preferences are saved as the portfolio plan's settings in Portfolio Planning. So, these settings are applied to all the users or user groups that the portfolio plan is shared with.

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. Use the Personalize side panel to update the display of rows and columns on the page.

   a. Select the Personalize icon ().

   b. From the Columns section, select the columns that you want to see or hide the data of.

      You can reorder the columns here to change their display order on the backlog.

      If you want additional columns to be available in this page, your admin can configure them. See Configuring additional columns for Prioritization page in Portfolio Planning.

   c. From the Rows section, choose how the rows are displayed, using the **Shade alternate rows** toggle.

4. Group your items by one or multiple columns that are on display in the Prioritization page.

   You can group the planning items by an attribute of the type choice or reference. Some examples to group by are Planning state, Planning item type, Owner, and Primary goal.

   Use one of the following ways to group the planning items. Repeat the action to group the list by multiple attributes.

5. Sort the planning items by any column, by clicking the column name.
   For example, you can sort the items by **Approved start date**.
6. Filter the planning items by an attribute.

   a. For the column that you want to filter, select the Column actions icon ().

   b. Select **Filter**.

   c. Select or type the filter that you want to apply.

      For example, you can have the list to show only **New** items, by filtering the **Planning state** column. Other examples to filter by are the item's planning state, primary goal, or priority.

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Note:

You can filter only on those attributes that are of the type choice, string, or reference.

7. Pin columns to the left or right of the list.

   a. For the column that you want to pin, select the Column actions icon ( ).

   b. From the Pin column section, select **Pin to left** or **Pin to right**.
   The default selection is **Unpin**.

8. Adjust the width of the columns as per choice or set the width to autofit.
   Hold and drag the column border to adjust its width. You can set the column width to autofit using the **Autofit this column** or **Autofit all columns** options from the Column actions ( ).

9. Reset columns to default settings by selecting **Reset columns** from the Personalize menu ( ).

   Selecting this option reverts the column personalization, grouping, and sorting to default settings.

   Personalization settings that you've made so far on the Prioritization page would be cleared. Any personalization that you make after this point is set as the new preference for the portfolio.

10. Apply quick filters for Prioritization and Roadmap data in Portfolio Planning

Personalize Prioritization Hierarchy view in Portfolio Planning Workspace

Personalize the Hierarchy view in the Prioritization page of Portfolio Planning Workspace so that you can view the information that is most relevant to you and your stakeholders.

Before you begin

Create a portfolio plan.

Role required: sn_align_core.apw_user

About this task

Sort the planning items by an attribute of your choice and use the Personalize side panel to customize the display of the columns.

Personalization preferences are saved as the portfolio plan's settings in Portfolio Planning. So, these settings are applied to all the users or user groups that the portfolio plan is shared with.

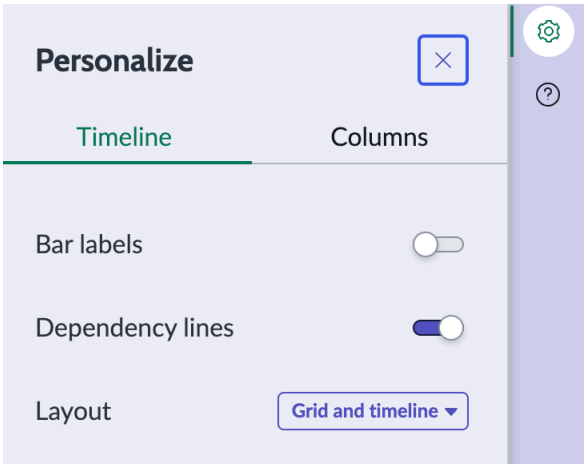
Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. Personalize the timeline view and the columns on the grid view using the Personalize side panel.

   a. Select the Personalize icon ( ).

   The personalize side panel opens.

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b. From the Timeline section, toggle the display of item names and dependency lines.
You can also choose to update the layout. Select Grid and timeline view, Grid view, or just the Timeline view.

c. From the Columns section, update the planning item fields that are displayed in the grid view.
Select the necessary columns and click **Apply**.

4. Sort the planning items by any column, by clicking the column name.
For example, you can sort the items by **Approved start date**.
5. Apply quick filters for Prioritization and Roadmap data in Portfolio Planning

Export data of portfolio plan items from Prioritization to Excel or CSV

Export the data of portfolio plan items from your portfolio plan into a Microsoft Excel or CSV file. You can share this data and collaborate with your business stakeholders.

Before you begin

Role required: sn_align_core.apw_user

Procedure

1. Navigate to **All** > **Strategic Planning** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. In the Prioritization tab, select **List** view.
4. Verify that the columns you want to export are personalized.

Note:
If the filters are applied on the view, the filtered data is exported.

5. Use the personalized side panel to export the data of your portfolio plan items.

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a. Select Export icon ().

b. From the **File type** drop-down on the Export window, select **Excel** or **CSV** to export the data to a Microsoft Excel or CSV file respectively.
A file with the selected format is exported. By default, the name of the file is *ABC_Prioritization_List* where ABC is the name of the portfolio plan you exported the data from.

Planning roadmaps in Portfolio Planning

Create a layout of the plans for upcoming projects or initiatives while aligning them with your business objectives using roadmaps in a centralized workspace. Facilitate collaboration among stakeholders and adjust plans on the go.

Roadmaps in Portfolio Planning Workspace are of two types: Portfolio plan roadmaps and free-form roadmaps.

For portfolio plans, only those planning items that are prioritized from the Prioritization page are shown on the roadmap. See Prioritize work.

Use the information in the following sections to start using roadmap capabilities for your business plans.

Related topics

Roadmaps in Portfolio Planning

Create free-form roadmap in Portfolio Planning Workspace

Create a standalone visual roadmap to start high-level planning of work from different units of the company.

Before you begin
Role required: sn_align_core.apw_user

About this task
Create a standalone roadmap to plan work across multiple units of your organization, such as projects of all departments. To learn more about free-form roadmaps, see Roadmaps in Portfolio Planning.

Select a source table as a starting point to base your roadmap on. Select one of project or demand for a simple roadmap or Planning Item table for a hybrid roadmap.

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning** > **Free-form Roadmaps**
2. Select **New**.
   If this is the first free-form roadmap in your ServiceNow® instance, select **Create your first free-form roadmap**.
3. Use the Create free-form roadmap wizard to fill out the details of your roadmap.

   a. Select a source table to base your roadmap on.

   b. Add conditions to filter the data from the source table.

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For example, if your source table is **Project**, the related filter condition can be **Business Unit is Finance AND Active is true**.

c. Enter details of the name and planned dates for the roadmap.

> **Note:**
> The start and end dates for your roadmap act as a date range filter for all the items displayed in the roadmap.

4. Select **Create**.

Result

- A new roadmap is created and displayed.
- This roadmap is listed in the **Free-form roadmaps** tab of the Home page of Portfolio Planning Workspace.

What to do next

- Update, personalize, and collaborate with your roadmap.
- Add milestones or create dependencies for the items planned on your roadmap.

Update details of free-form roadmap in Portfolio Planning Workspace

Update the details of a free-form roadmap to reflect the changes in priorities or the timeline of the roadmap.

Before you begin

Create free-form roadmap in Portfolio Planning Workspace.

Role required: sn_align_core.apw_user

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning** > **Free-form Roadmaps**
2. Select a roadmap to open it.
3. From the roadmap header, select the More actions icon (⋮).
4. Use the Update free-form roadmap wizard to edit out the details of your roadmap.
5. Select **Update**.

Result

The roadmap is updated and the roadmap items are displayed according to the latest changes.

Share a free-form roadmap with stakeholders in Portfolio Planning Workspace

Add people from your organization who are the stakeholders for the work involved in your roadmap plan so that they have visibility into the roadmap's progress.

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Before you begin

- Create free-form roadmap in Portfolio Planning Workspace.
- Ensure that the users that you add as stakeholders have the appropriate role to access the roadmap. For more details on user roles, see Components installed with Portfolio Planning.

Role required: sn_align_core.apw_user

About this task

Grant access for the free-form roadmap to other users and stakeholders in your organization.

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning** > **Free-form Roadmaps**
2. Select a roadmap to open it.
3. From the roadmap header, select the **Share roadmap** icon ( ).
4. On the Share roadmap form, select users to share the roadmap with and set their access appropriately.
   a. In the **Members or Groups** field, enter the names of individual users or groups.
   b. From the **Access** field, select the access level as **Viewer** or **Editor** for the users selected.
      - An editor can view and change the roadmap's settings and data.
      - A viewer can only comment or add attachments. They can't change any settings or data.
5. Select **Send invite**.

What to do next

Change the access level or remove access for a user or a group.

1. On the Share roadmap form, select **Manage access**.
2. From the user or group card, select the action menu icon ( ).
3. Select the right access level or select **Remove**.

Managing free-form roadmap views in Portfolio Planning

Portfolio managers can create customized views for their free-form roadmap by applying personalization settings such as grouping, milestones selection, dependencies selection, and tracking mode. Portfolio owners or editors can share these personalized views with stakeholders to enable easier collaboration on the free-form roadmaps.

Benefits of free-form roadmap views

Portfolio managers can create personalized views as needed by applying settings such as grouping, milestones selection, dependencies selection, and tracking mode.

- Views can be created as private or public.
- Can create up to three private views and up to 10 shared (public) views.

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- Free-form roadmap views can be shared with stakeholders to enable collaboration on the free-form roadmap.
- Switch between shared and private views as needed.

Create a free-form roadmap view in Portfolio Planning

Create a customized free-form roadmap view based on your requirements, so you can access it when you log in again and share it with stakeholders for collaboration.

Before you begin

Role required: sn_align_core.ap_read_only

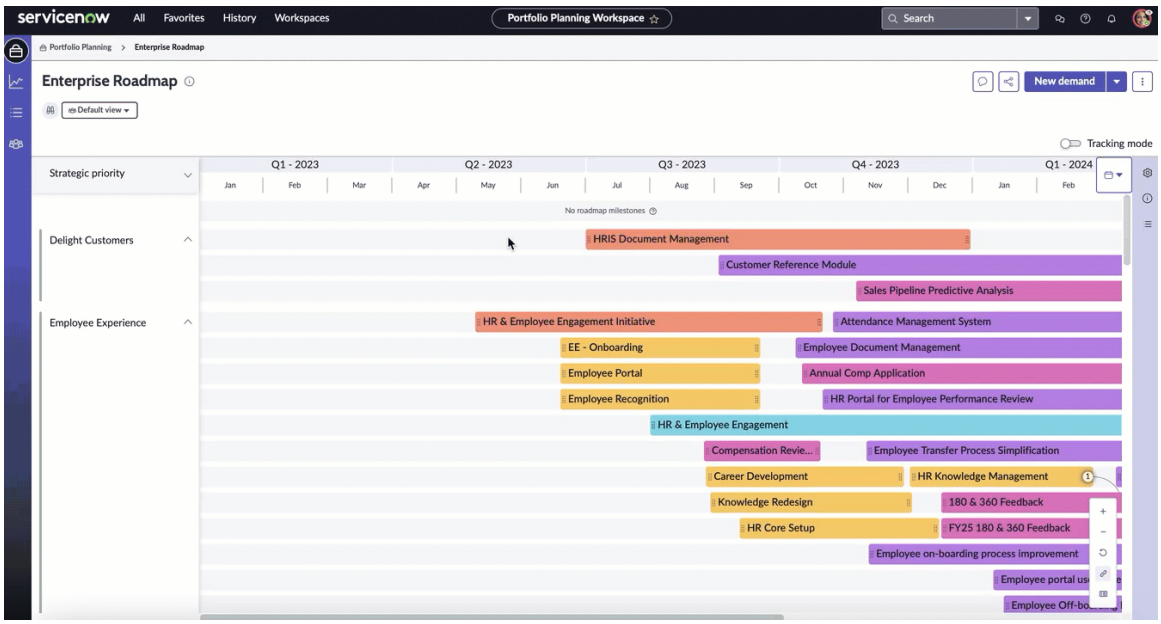
About this task

You can create up to three private views and up to 10 shared (public) views per free-form roadmap.

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning** > **Free-form Roadmaps**
2. Select a free-form roadmap to open it.
3. Change the view as needed.
   For example, you can enable the **Tracking mode** toggle.

   The **Save as new view** option appears on the free-form roadmap header.



4. From the free-form roadmap header, select **Save as new view**.
5. On the Save as new view window, fill the details.

   a. Enter a name for the view in the **View name** field.

   b. **Optional:** Select the **Shared view** toggle to make this view public.
   Selecting the **Shared view** toggle makes the view visible to all stakeholders with whom this free-form roadmap is shared.

   c. Select **Save**.

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Result
The shared view for the free-form roadmap is created and is visible to all stakeholders with whom this free-form roadmap is shared.

What to do next
- Share the free-form roadmap with your stakeholders to start collaborating on the free-form roadmap. See Share a free-form roadmap with stakeholders in Portfolio Planning Workspace.
- Edit a free-form roadmap view to change the existing view. See Edit a free-form roadmap view in Portfolio Planning.

Edit a free-form roadmap view in Portfolio Planning

Edit a customized free-form roadmap view based on your requirements, so you can access it when you log in again and share it with stakeholders for collaboration.

Before you begin
Role required: sn_align_core.ap_read_only

About this task
- Only the owner of a free-form roadmap view can edit a shared (public) view.
- You can have up to three private views and up to ten shared (public) views per free-form roadmap.

Procedure
1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning** > **Free-form Roadmaps**
2. Select a free-form roadmap to open it.
3. From the free-form roadmap header, select the view you want to edit or override with your personalization settings from the list of available free-form roadmap views.
   The selected view appears.
4. Make changes to the view as needed.
   For example, enable **Tracking mode** toggle.

   After you make any change to the view, the Save view option appears in the free-form roadmap header.
5. Select **Save view**.
   The view is updated to reflect the changes made.
6. **Optional:** To edit the name of the view, select the Free-form roadmap drop-down from the free-form roadmap header and then select the Edit view icon ( ) next to the view you want to edit the name for.
   On the Edit view window, fill the details.

   a. Update the name for the view in the **View name** field as required.

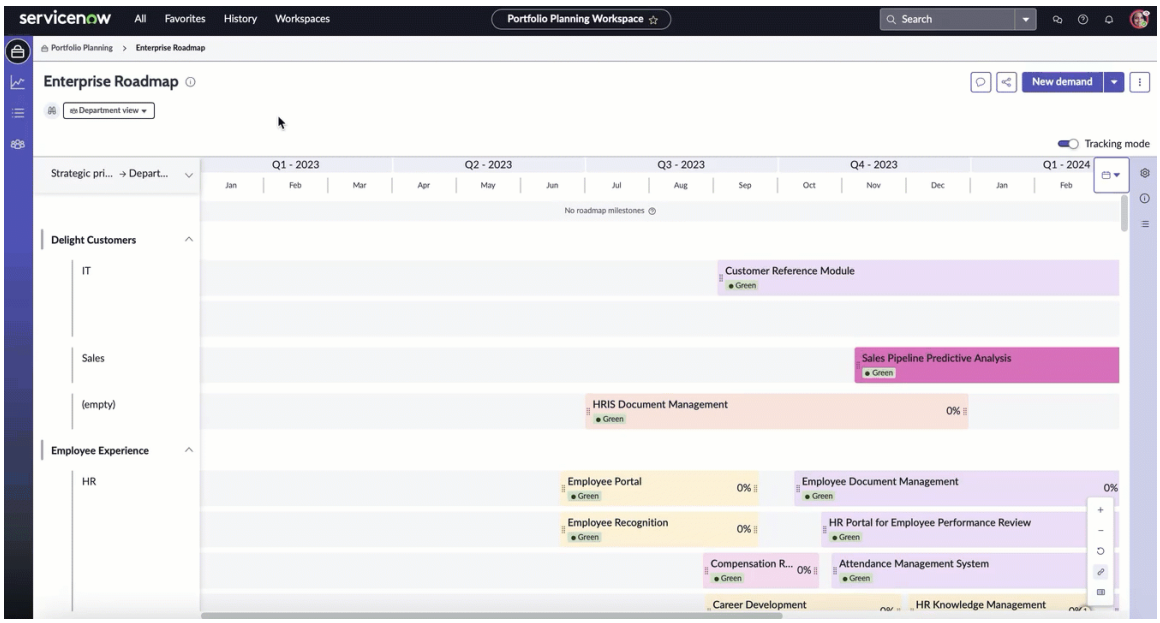
   Note:
   Only the owner of the free-form roadmap view can rename the view.

   b. **Optional:** Select the **Shared view** toggle to make this view public or disable the **Shared view** toggle to make the view private.

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Important:
Changing a shared view to a private view removes access for existing stakeholders.

c. Select **Save**.



What to do next

Share the free-form roadmap with your stakeholders to start collaborating on the free-form roadmap. For more information, see Share a free-form roadmap with stakeholders in Portfolio Planning Workspace.

Related topics

Create a free-form roadmap view in Portfolio Planning

Delete a free-form roadmap view in Portfolio Planning

Delete a free-form roadmap view in Portfolio Planning

Delete a customized free-form roadmap view if it is no longer needed or if the maximum limit of ten shared or three private views has been reached.

Before you begin

Role required: sn_align_core.ap_read_only

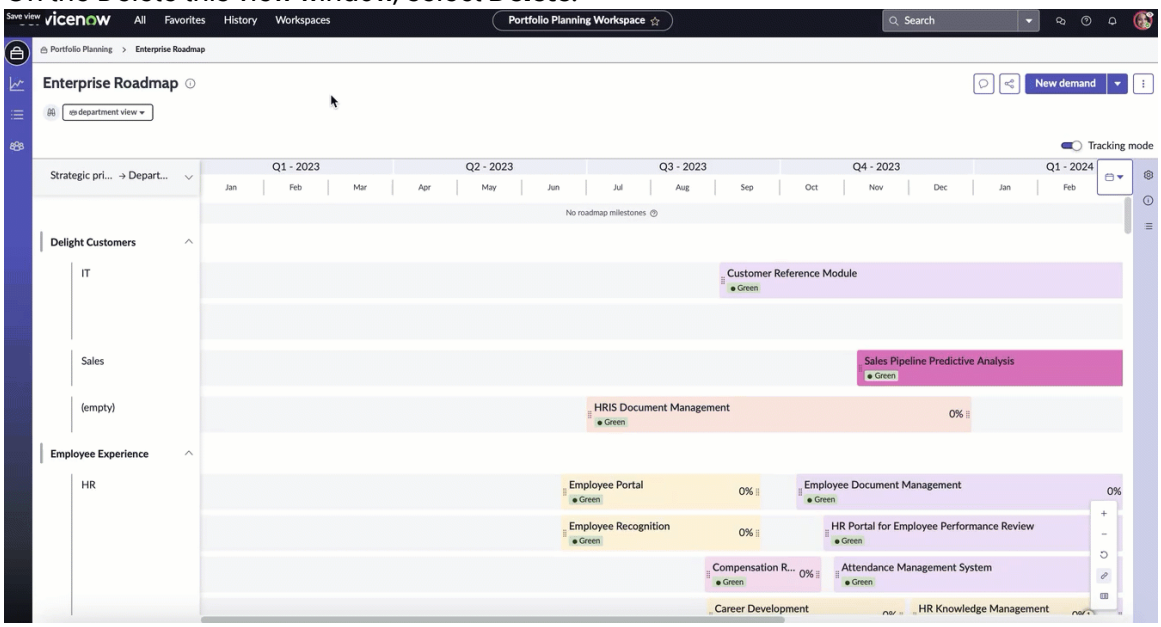
About this task

- Only the owner of the free-form roadmap view or an editor of the free-form roadmap can delete the view.
- Deleting a free-form roadmap deletes the view, including any changes made to the view. However, this action keeps the items (projects, demands, epics) intact in the free-form roadmap.
- You can have up to three private views and up to ten shared (public) views per free-form roadmap.

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Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning** > **Free-form Roadmaps**
2. Select a free-form roadmap to open it.
3. Select the Free-form roadmap view drop-down from the free-form roadmap header and then select the Delete view icon ( ) next to the view you want to delete.
   The Delete this view window appears.
4. On the Delete this view window, select **Delete**.



Related topics

Create a free-form roadmap view in Portfolio Planning

Edit a free-form roadmap view in Portfolio Planning

Create a copy of an existing free-form roadmap in Portfolio Planning Workspace

Create a roadmap with the data of an existing roadmap. If the roadmap you want to create is similar to an existing roadmap, copying the existing roadmap saves your time.

Before you begin

Role required: sn_align_core.apw_user

About this task

Create a standalone roadmap to plan work across multiple units of your organization, such as projects of all departments. To learn more about free-form roadmaps, see Roadmaps in Portfolio Planning.

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning** > **Free-form Roadmaps**
2. Select a roadmap that you want to create a copy from.

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3. From the roadmap header, select the More actions icon (⋮) and then select **Duplicate roadmap**.
4. On the Duplicate roadmap window, fill the details.

   a. Enter a name for the roadmap in the **Roadmap name** field.
   By default, the name is *ABC (Copy)* where ABC is the name of the roadmap you copied from.

   b. **Optional:** Select **Share with same users and groups** option to grant access to the users of the roadmap you copied from.
   The action grants same read and edit access as is the users had for the roadmap you copied from.

   c. Select **Confirm**.

Result

- A new roadmap is created and a link is generated on the screen to access the new roadmap.
- This roadmap is listed in the **Free-form roadmaps** tab of the Home page of Portfolio Planning Workspace.

What to do next

- Update, personalize, and collaborate with your roadmap.
- Add milestones or create dependencies for the items planned on your roadmap.

Create planning items from roadmap view in Portfolio Planning Workspace

Create and add new planning items to your portfolio roadmap or free-form roadmap directly from the roadmap view.

Before you begin

Role required: sn_align_core.apw_user

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning** and open your roadmap.
2. From the roadmap view, select the **New <item type>** option.
   - For a free-form roadmap, the option depends on the roadmap's source table.
   - For a portfolio plan roadmap, the option depends on the portfolio plan settings.

One planning item type	Multiple planning item types
	

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3. On the form, fill in the required field information.
   For full field information, see Demand planning item form or Project planning item form.
4. Select **Submit**.

Result
The new item appears on the roadmap, at a place based on its approved start and end dates.

If you don't fill both the approved start and end date fields, the item that you created would be moved to the list of unscheduled items. You can add them to your roadmap plan later. For more information, see Plan unscheduled items into roadmap in Portfolio Planning Workspace.

Modify planning items from roadmap in Portfolio Planning Workspace

Update the details of planning items or delete them from a portfolio plan or free-form roadmap so that your roadmap reflects the latest plans.

Before you begin
Role required: sn_align_core.apw_user

About this task
Edit the details of planning items from a side panel view, or the full details view in the roadmap.

Procedure
1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning** and open your roadmap.

2. From the roadmap view, click a planning item that you want to update or delete.

   The side panel opens with the Details tab.

   Further, you can click **Full details** and open the item's record page. On the full details page, you can also view related lists such as Milestones, Dependencies, and others. For field information, see Demand planning item form or Project planning item form.

   Note:
   If your free-form roadmap was built on one of the PPM tables, such as project [pm_project] or demand [dmn_demand], you can only make updates from the full details page.

3. Update the details or delete the item.
   - To update, edit the field details and click **Update**.

     If you're on the full details page, click **Save**.

   - To delete, do the following:

     a. On the full details page, click the More Actions icon ( ) and select **Delete**.

     b. Click **OK** to confirm.

Plan unscheduled items into roadmap in Portfolio Planning Workspace

Add items without start or end dates yet to your portfolio plan or free-form roadmap.

Before you begin
Role required: sn_align_core.apw_user

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About this task

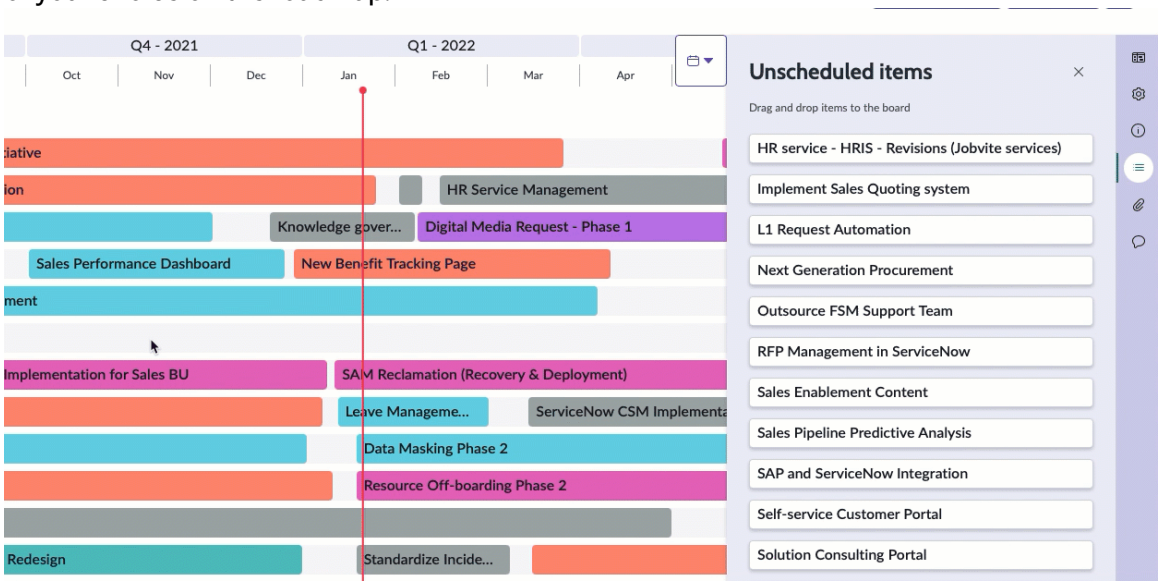
Planning items that meet the criteria of your portfolio plan or free-form roadmap, but don't have either the start or end dates are categorized as unscheduled items. As you progress in your planning, use the unscheduled items list to schedule these items into your roadmap timeline.

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning** and open your roadmap.

2. From the sidebar, select Unscheduled items ( ).

3. From the list of unscheduled items in the side panel, drag and drop a planning item at a place of your choice on the roadmap.



Reschedule roadmap items in Portfolio Planning Workspace

Update the planned dates of your roadmap items to account for any changes in your scheduling priorities.

Before you begin

Role required: sn_align_core.apw_user

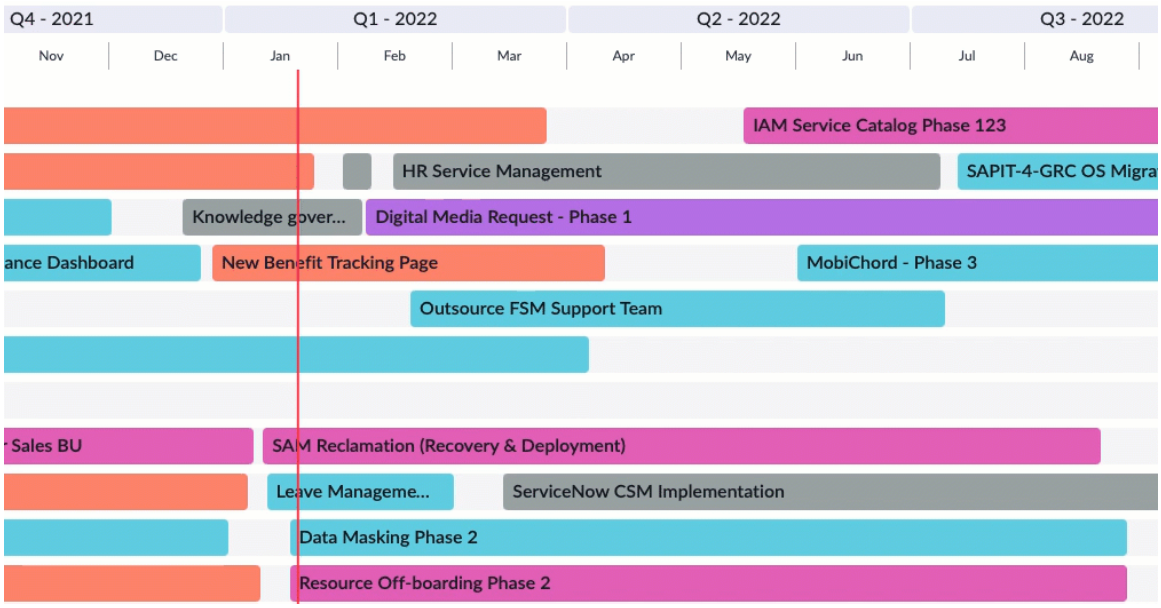
Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning** and open your roadmap.

2. To change the dates planned for a roadmap item, resize the roadmap item bar.

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3. To reschedule the roadmap item, drag and drop the item to a timeline area of your choice.



Add milestones for roadmap in Portfolio Planning Workspace

Track key dates of your plan's timeline by creating milestones and displaying them on the roadmap.

Before you begin

Role required: sn_align_core.apw_user

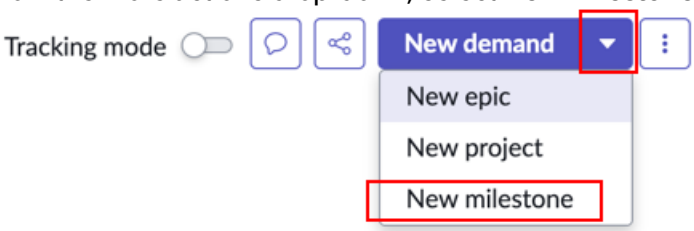
About this task

For the timeline of your portfolio plan or free-form roadmap, create milestones such as launch dates, deadlines, or other key events directly from the roadmap view.

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning** and open your roadmap.

2. From the More actions drop-down, select **New milestone**.



3. On the form, fill in the fields.

   For field information, see Roadmap milestone form.

4. Select **Submit**.

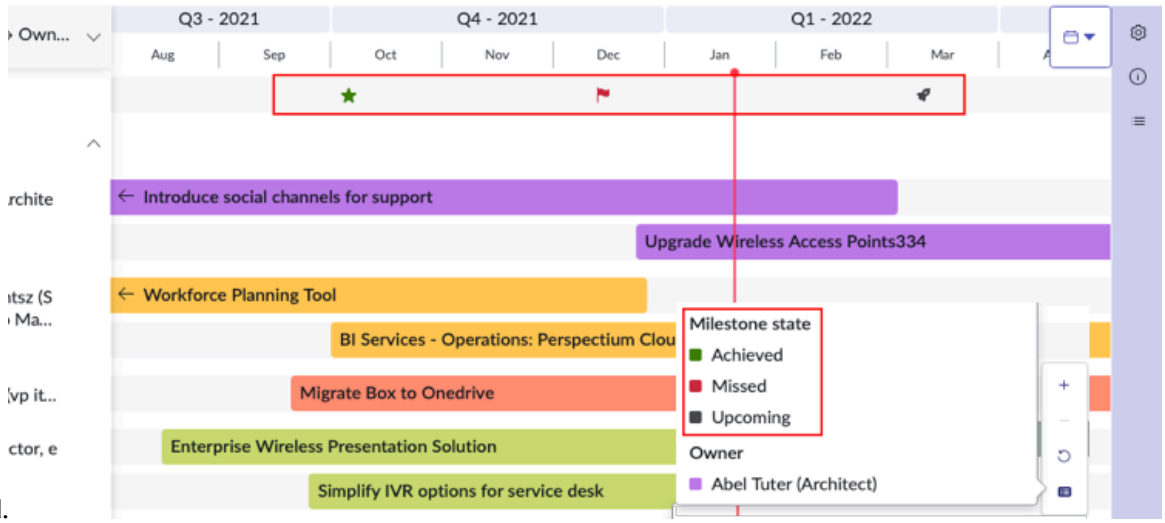
5. **Optional:** Repeat steps 2 through 4 to add more milestones to your roadmap.

Result

Milestones that you created are visible on the roadmap.

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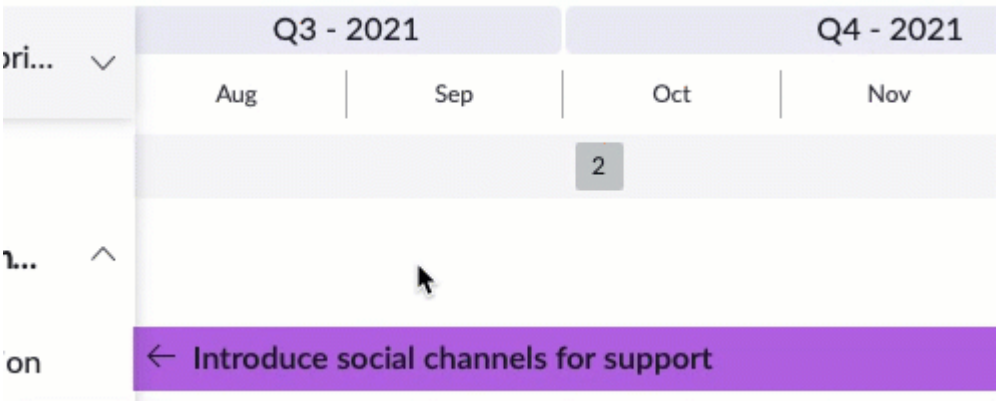
Here is an image of a sample roadmap with the milestone bar showing different milestones for the planning period.



The color of the milestone, shown on the legend, indicates the status of the milestone.

- Red: Missed milestone.
- Green: Achieved milestone.
- Grey: Upcoming milestone.

If multiple milestones are scheduled close to each other, they might appear grouped in the milestone bar. In this case, you can expand and collapse the milestone bar to view all the milestones of that period.



Update a roadmap milestone in Portfolio Planning Workspace

Update or delete the milestones that you added to your portfolio plan or free-form roadmap so that they reflect any change of plans.

Before you begin

Add milestones for roadmap in Portfolio Planning Workspace.

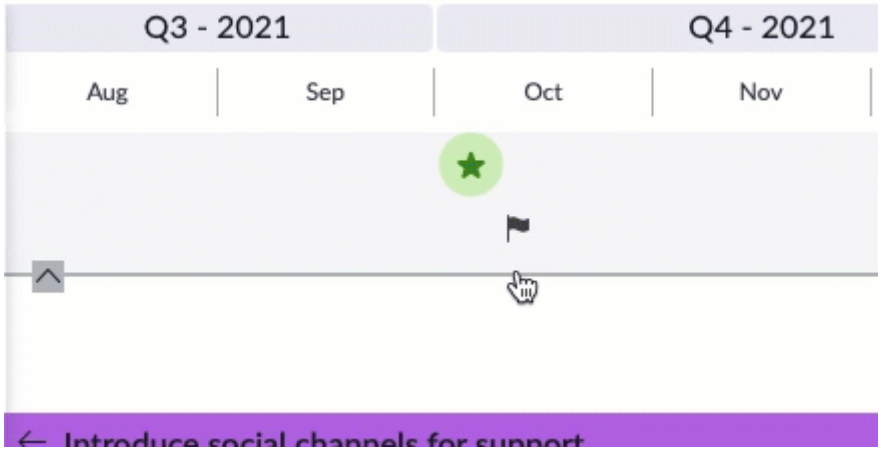
Role required: sn_align_core.apw_user

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning** and open your roadmap.

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2. To reschedule a milestone, you can drag and drop it at a timeline area of your choice.



If you want to update other details or delete the milestone, proceed with the following steps.

3. From the roadmap view, click the milestone that you want to update.
The side panel opens showing the milestone details.
4. Update or delete the milestone.
   - To update, edit the field details and click **Save**.

     For information on the form fields, see Roadmap configuration form.
   - To delete the milestone, click **Delete.**

     Select **OK** to confirm.

Add milestones for roadmap items in Portfolio Planning Workspace

Track key outcomes of your planning items (such as demands and projects) by creating milestones for them, directly from the roadmap view.

Before you begin

Role required: sn_align_core.apw_user

About this task

Select a roadmap item and create a milestone for it. Use the roadmap side panel to fill in the details and submit.

For free-form roadmaps, milestones are supported only if the source table is Planning Item [sn_align_core_planning_item] or one of its extensions.

Important:

You can't add a project milestone from the roadmap view. Creating or updating project milestones may impact the associated project plans. So, it's recommended to create or update project milestones using Project Workspace in Project Portfolio Management (PPM).

However, any existing milestones of the project are visible on the roadmap if you've integrated Portfolio Planning with Project Portfolio Management.

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning** and open your roadmap.

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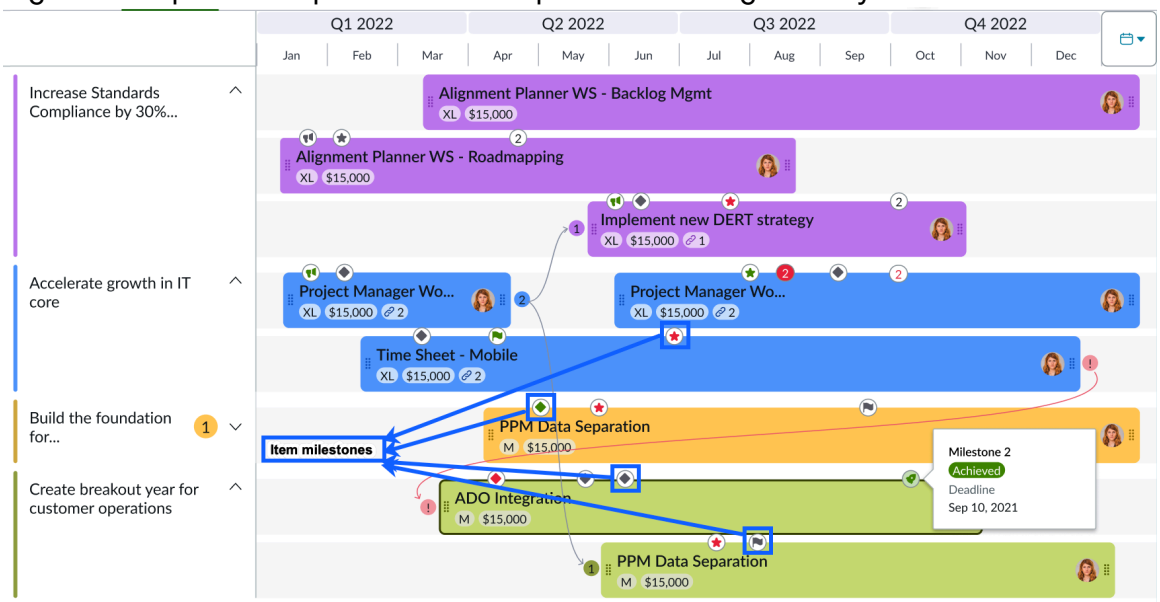
2. From the roadmap view, click a planning item to which you want to add the milestone.
   The side panel opens showing the item details.
3. Select the Milestones tab.
   Alternatively, you can click **Full details** and select the Milestones tab from the full details page.
4. Select the Add milestone icon ( ).
   If the item doesn't have any milestones, select **New milestone**.
5. On the form, fill in the fields.

   For field information, see Planning item milestone form.
6. Select **Save**.
   When you go back to the Milestones tab, you can see the milestone listed there.
7. **Optional:** Repeat steps 2 through 6 to add more milestones to your items.

Result

- Milestones that you created are indicated on the roadmap item bars.

  Here's an image of a sample roadmap with the roadmap items indicating that they have milestones.



- Pointing your cursor over these milestone indicators shows the details such as the milestone name, type, and due date.
- Clicking one of these indicators opens the Milestones tab of the Item details side panel. Here, you can see a list of all the milestones for this planning item.

What to do next

Learn more about managing milestones:

- Customizing milestone display on roadmap in Portfolio Planning Workspace
- Item milestone errors in Portfolio Planning Workspace
- Update roadmap item milestones in Portfolio Planning Workspace

Update roadmap item milestones in Portfolio Planning Workspace

Update or delete the milestones that you added to your planning items (such as demands, scrum epics, or programs) so that they reflect any change of plans.

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Before you begin

Add milestones for roadmap items in Portfolio Planning Workspace.

Role required: sn_align_core.apw_user

About this task

From the portfolio roadmap or free-form roadmap, select a planning milestone to update its details. Use the roadmap side panel to edit the details and submit.

For free-form roadmaps, milestones are supported only if the source table is Planning Item [sn_align_core_planning_item] or one of its extensions.

Important:

You can't add a project milestone from the roadmap view. Creating or updating project milestones may impact the associated project plans. So, it's recommended to create or update project milestones using Project Workspace in Project Portfolio Management (PPM).

However, any existing milestones of the project are visible on the roadmap if you've integrated Portfolio Planning with Project Portfolio Management.

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning** and open your roadmap.
2. From the roadmap view, click a planning item and select the Milestones tab.

   The side panel shows the list of all the milestones associated with this planning item.

   Alternatively, you can click **Full details** and open the item's record page and then select the Milestones tab.
3. Click the milestone that you want to update.
4. From the milestone form, update the details or delete the milestone.
   - To update, edit the field details and click **Save**.

     For information on the form fields, see Planning item milestone form.
   - To delete the milestone, click **Delete.**

     Select **OK** to confirm.

Add dependencies for roadmap items in Portfolio Planning Workspace

Create dependencies and visualize relationships between planning items of your portfolio or free-form roadmap, so that you can adjust their scheduling.

Before you begin

Role required: sn_align_core.apw_user

About this task

From the portfolio roadmap or the free-form roadmap, use the item details side panel to create dependencies between two planning items. Dependencies are supported for projects, epics, demands, initiatives, programs, or any custom planning item types that you may have created.

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The dependency for a planning item on your roadmap can be on an item from the same roadmap, a different roadmap, or the item might not be planned yet. Learn more about dependencies in the roadmap.

Note:
Dependencies for free-form roadmaps are available only if the roadmap's source table is Planning Item [sn_align_core_planning_item] or one of its extensions.

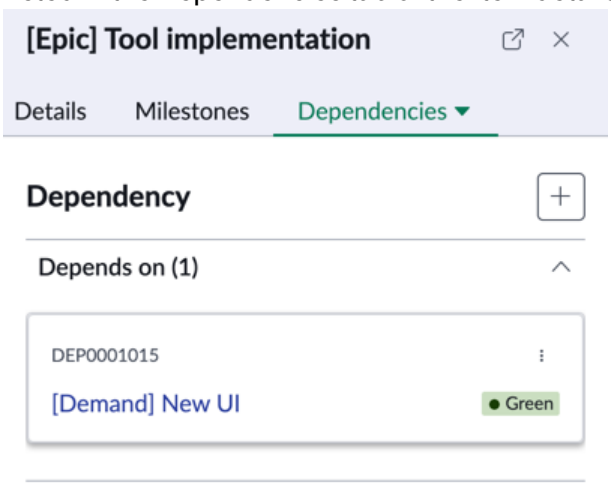
Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning** and open your roadmap.
2. From the roadmap view, click a planning item for which you want to add the dependency. The side panel opens showing the item details.
3. Select **More** > **Dependencies**.
4. From the Dependencies tab, select the Add dependency icon ( ).
5. On the form, fill in the fields.

   For form field information, see Dependency form.
6. Select **Save**.

Result

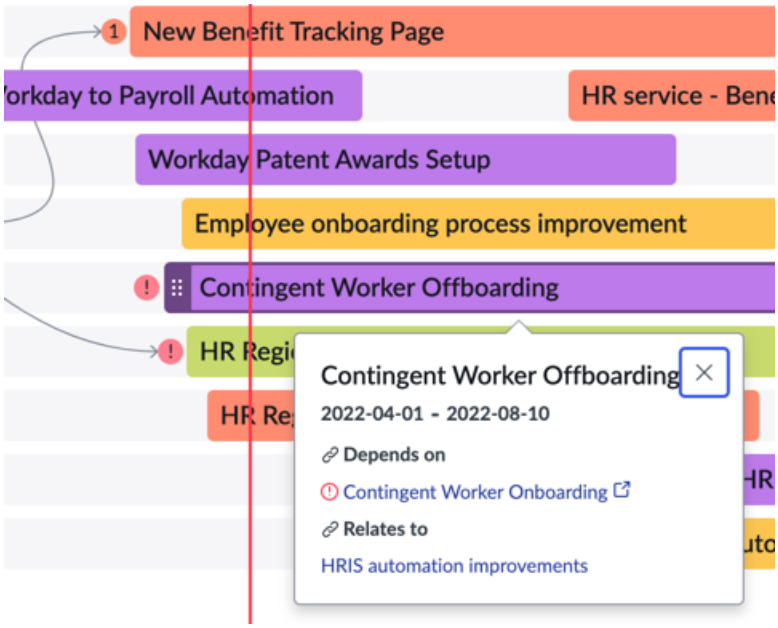
The dependency is created between the selected planning items and is listed in the Dependencies tab of the Item details side panel.



On the roadmap, you can see the dependency details from the roadmap item card or the dependency lines. Learn about display settings available for dependencies on the roadmap.

If one of the dependency items is not on the roadmap, then the dependency details are shown on the roadmap item card, with a redirect link to the external planning item. In this case, the items could belong to the same roadmap or not.

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What to do next

- Learn how to resolve a roadmap item dependency error.
- Update the dependency details or delete it. See Update roadmap item dependencies in Portfolio Planning.

Update roadmap item dependencies in Portfolio Planning

Update or delete the dependencies for the planning items on your roadmap so that they reflect any change of plans.

Before you begin

Role required: sn_align_core.apw_user

About this task

Use the roadmap side panel to change the details of a dependency or delete it.

Dependencies for free-form roadmaps are available only if the roadmap's source table is Planning Item [sn_align_core_planning_item] or one of its extensions.

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning** and open your roadmap.

2. From the roadmap view, click a planning item whose dependencies you want to update or delete.

   The side panel opens showing the item details.

3. Select **More** > **Dependencies**.
   Dependencies for this planning item are listed in the form of cards.

4. From the side panel, locate your dependency and use the More actions icon (⋮) to edit or delete.

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Personalize roadmap view in Portfolio Planning Workspace

Customize the way that your roadmap is displayed. Group the roadmap items, color them by a category, add numerical data points, and display milestones and dependencies to analyze your roadmap efficiently and take informed decisions.

Before you begin

Role required: sn_align_core.apw_user

About this task

This task provides guidance on different options to personalize your roadmap view. Choose the options that you want to apply.

Any settings that you apply here are saved as preferences per roadmap. All users who can access the roadmap would see the same settings.

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning** and open your roadmap.

2. Modify the scale of the timeline of your roadmap.
   Select the time scale icon ( ) and choose **Month**, **Quarter**, or **Year**.

   Note:
   The timescale view that you choose is saved in the roadmap preferences.

3. Use the side panel to personalize how your roadmap looks like.

   a. From the side bar, select the Personalize icon ( ).

   b. Group and color your roadmap items by the available attributes.

      You can group the roadmap items by up to two attributes and color-code them by one attribute.

      You can work with your admin to add other attributes for the Group by, Color by, and Metrics fields. See Customize the display preferences for Prioritization and Roadmap in Portfolio Planning Workspace.

   c. Enable visibility of owners of the roadmap items by using the **Owner** toggle.

   d. Display data points such as planned cost on the roadmap item bars by adding fields in the **Metrics** section.

      You can add up to three metrics.



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e. If your roadmap items (such as projects, epics, or demands) have milestones, adjust how they're displayed using the toggles in the Milestones section.
For more information, see Customizing milestone display on roadmap in Portfolio Planning Workspace.

f. If your roadmap items have dependencies, adjust how they're displayed using the toggles in the Dependencies section.
For more information, see Customizing roadmap item dependency display in Portfolio Planning Workspace.

g. Identify the current date on your timeline using the current date indicator.
Enable the **Current date line** toggle from the Other settings section.

4. Filter the data shown on the roadmap by applying conditions to the planning items.

a. From the sidebar, select the Filter roadmap items icon ( ).
The side panel opens to show the currently applied filters in the Filter overview.

b. Select **Update filter** to add or update the conditions.
Use the **AND** and **OR** operators to build your conditions.

c. Select **Apply**.

5. Quickly enable or disable the display of dependency lines between the roadmap items using the Display dependency lines icon ( ).
6. Zoom in, zoom out, and reset the zoom of your roadmap view by using the zoom options.



Note:
The zoom level that you choose isn't saved as the roadmap preferences.

7. Apply quick filters for Prioritization and Roadmap data in Portfolio Planning

Customizing milestone display on roadmap in Portfolio Planning Workspace

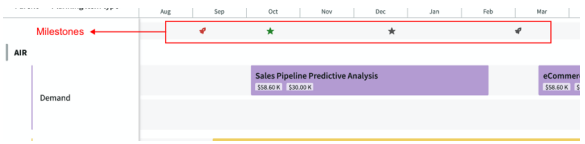
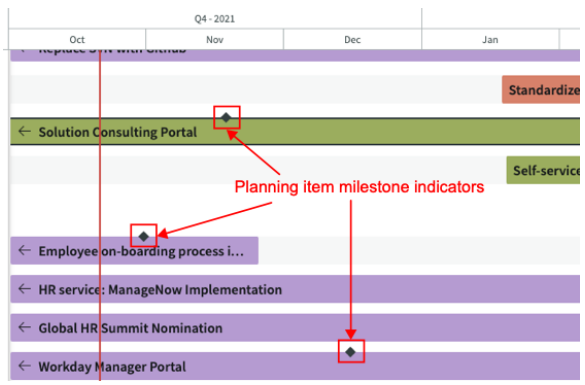
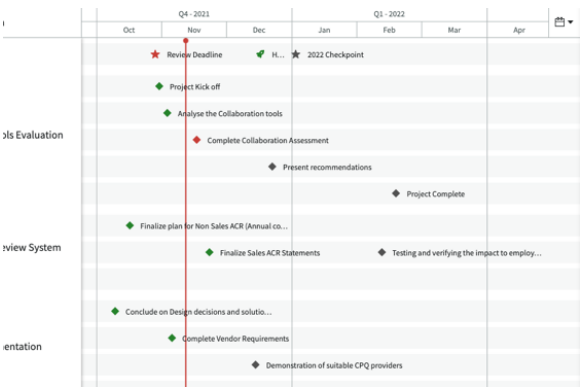
Easily track the milestones of your roadmap timeline or its planning items by choosing how the milestones are displayed on the roadmap view.

The Personalize ( ) side panel on the roadmap provides different toggles to personalize the display of milestones on your roadmap.

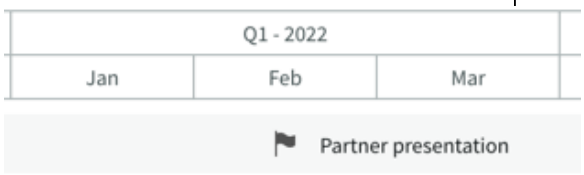
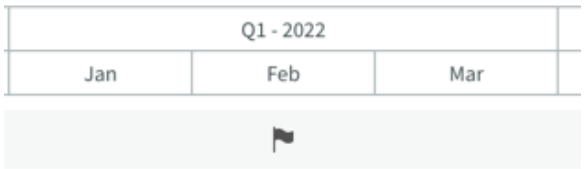
- For portfolio plan roadmaps, these toggles are always available.
- For free-form roadmaps, these toggles are available only if the roadmap's source table is the Planning Item table [sn_align_core_planning_item] or one of its extensions.

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Milestones toggle	Roadmap view
Roadmap milestones Shows the milestones of the roadmap timeline.	
Item milestones Shows the milestones of the planning items.	
Only milestones Shows just the milestones on the roadmap by hiding all the planning item bars. When you select this toggle, the group by and color by fields are changed and made inactive. Your previous personalization settings are available when you turn off this toggle. You can also see that the milestone indicators are colored in this view. • Red: Missed • Green: Achieved • Black/Dark gray: Upcoming	

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Milestones toggle	Roadmap view
Note: If the total number of item-level milestones, including the milestones for unscheduled items, exceeds 100, the item milestone indicators aren't visible on the roadmap. You can work with your admin to change this number to a value of your preference. For more information, see Update the display limit of items for Prioritization and Roadmap in Portfolio Planning.	
Milestone label Shows the milestone labels.	**Milestone indicator with label**  **Milestone indicator without label** 

Customizing roadmap item dependency display in Portfolio Planning Workspace

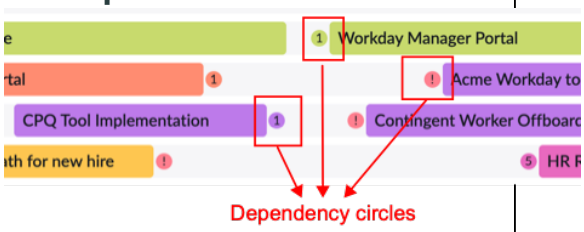
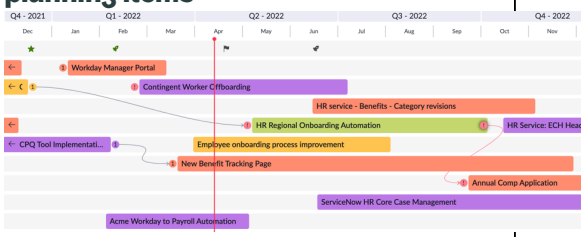
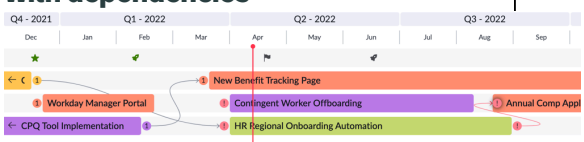
Improve the efficiency of identifying the relationships between your planning items by choosing how the dependencies are displayed on the roadmap view.

The Personalize ( ) side panel on the roadmap provides different toggles to personalize the display of dependencies on your roadmap.

- For portfolio plan roadmaps, these toggles are always available.
- For free-form roadmaps, these toggles are available only if the roadmap's source table is the Planning Item table [sn_align_core_planning_item] or one of its extensions.



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Dependencies Toggle	Roadmap view
View dependencies Indicates dependencies in the form of circles on either side of the planning item bars. These circles either contain a number inside them (1), indicating the number of dependencies that item shares, or is colored red (!) indicating a conflicting dependency. **Note:** This toggle must be enabled to use the other two toggles in the Dependencies section.	**Dependency circles on the roadmap** 
Dependency lines Indicates dependencies using lines between the planning items. These lines are shown only if: • Both planning items of the dependency are within the same roadmap • Dependency is of the **Depends on** type	**Dependency lines between the planning items** 
Only items with dependencies Filters the roadmap to show only those planning items that have that have at-least one **Depends on** type of relationship. The items shown here can depend on items on or out of the current roadmap.	**Roadmap showing only items with dependencies** 

Track roadmap item progress in Portfolio Planning Workspace

Visually track the completion of a work item on your portfolio plan roadmap or free-form roadmap using the tracking mode.

Before you begin

Role required: sn_align_core.apw_user

About this task

Use a toggle to switch your roadmap view from planning mode to tracking mode. The roadmap item cards turn into progress bars to indicate the status and progress.

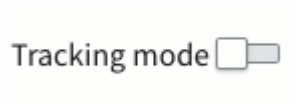
Note:
While in Tracking mode, you cannot create, update, or reschedule roadmap items and milestones. This view is a read-only mode.

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Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning** and open your roadmap.

2. Use the Tracking mode toggle to turn on the tracking view of the roadmap.



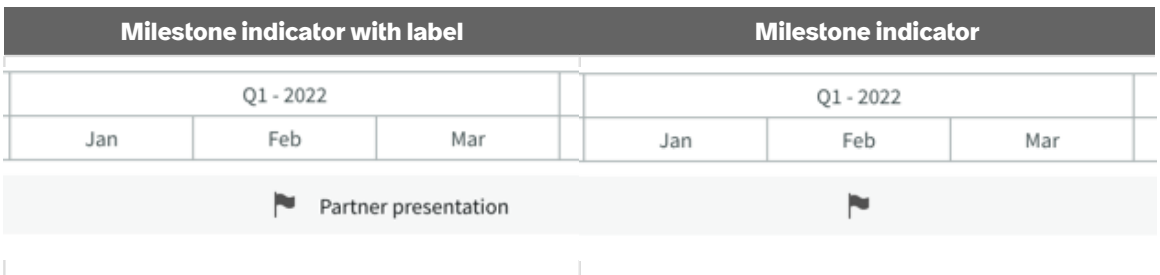
3. **Optional:** Personalize the roadmap view in tracking mode.

> **Note:**
> The group by and color by personalization that you've done in the planning mode of your roadmap gets carried over to the tracking mode but the metrics are not carried over.

   a. Enable or disable the visibility of the roadmap item status and percentage complete using the **Status** and **% Complete** toggles respectively.

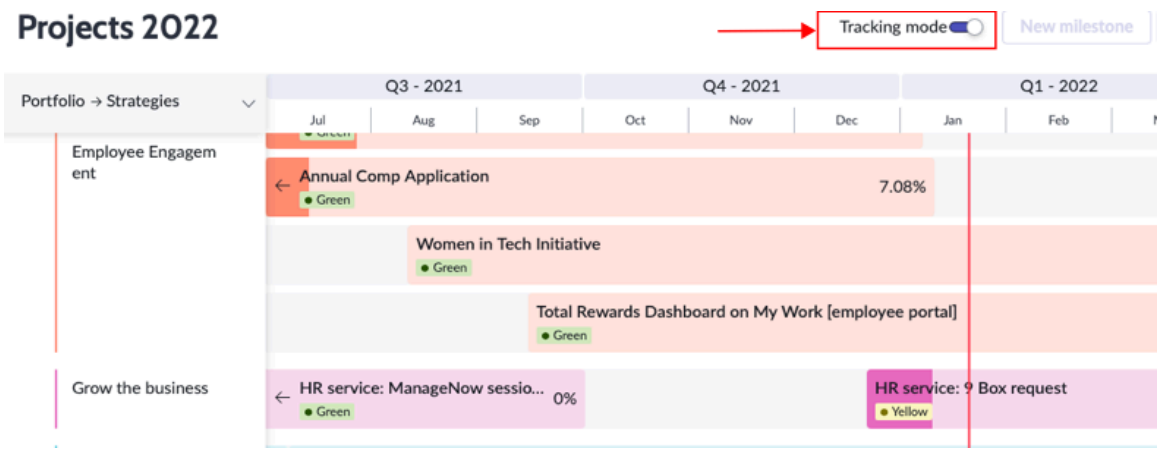
   b. Display data points such as planned cost on the roadmap item bars by adding fields in the **Metrics** section.
   You can add up to two metrics in tracking mode.

   c. Personalize the display of milestones.
   You can choose to display the milestone with just its icon or along with its label.



Result

The tracking view of your roadmap is displayed according to your personalization settings. A sample view of roadmap tracking is shown in the following image.



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Collaborate on a free-form roadmap in Portfolio Planning Workspace

Add comments and attachments to a free-form roadmap for other users of your organization can review and share their feedback. Collaborate and ensure that your roadmap aligns with your company's priorities.

Before you begin

Role required: sn_align_core.apw_user or sn_roadmap_plng.roadmap_editor

About this task

Using the Comments side panel, add attachments or notes at the roadmap-level or the planning item-level.

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning** > **Free-form Roadmaps**
2. Select a roadmap to collaborate on.
3. Select the appropriate tab at the roadmap-level or planning item-level.
4. Add attachments or worknotes.

Apply quick filters for Prioritization and Roadmap data in Portfolio Planning

Quickly apply filters for data in the Prioritization or Roadmap tabs to help you seamlessly plan using a consistent data set across all views of the tab.

Before you begin

Role required: sn_align_core.apw_user

About this task

Quick filters help you filter the data shown in the List and Hierarchy views of Prioritization and Roadmap. These filters are saved as your preferences. This way, you can view the same data across all views for a tab, even when you log back in later, helping you seamlessly plan, prioritize and roadmap work.

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. Based on the tab you want to work in, select **Prioritization**, **Roadmap**, or **Capacity Planning**.

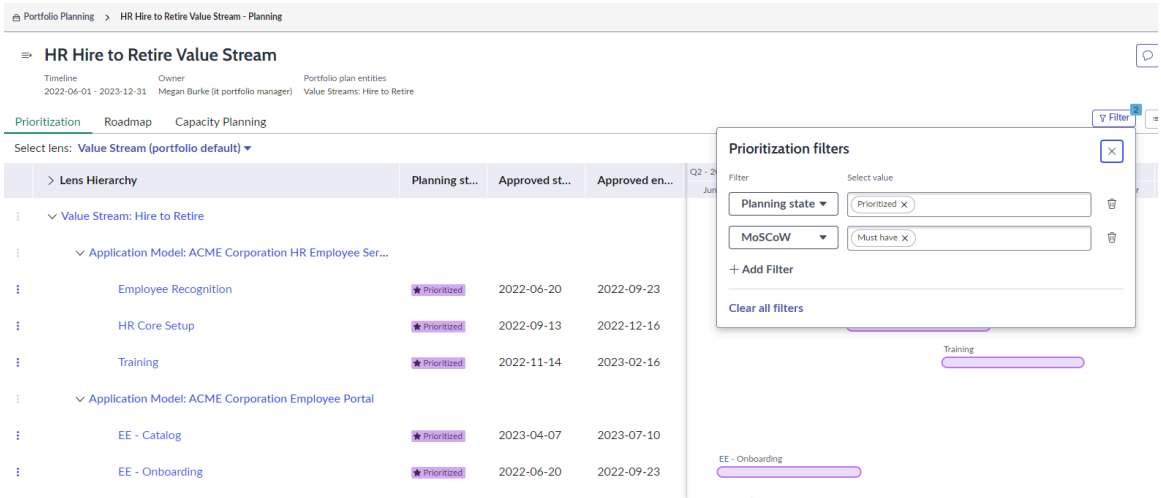
   By default, the data in the Roadmap tab is filtered with the Planning state of **Prioritized** and you see only prioritized items.
4. From the portfolio plan header, select **Filter** and add conditions.

   You can add filters for only those fields that are of the choice or reference type, within the tab.

   - You can apply filters on only those fields that are available in those views.
   - The filters are automatically applied and the data shown in the tabs is automatically refreshed.

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- The filters set in the Prioritization tab are not applied to the Roadmap tab and vice-versa.
- The filters set in to one view are also applied to the other views, within the same tab.

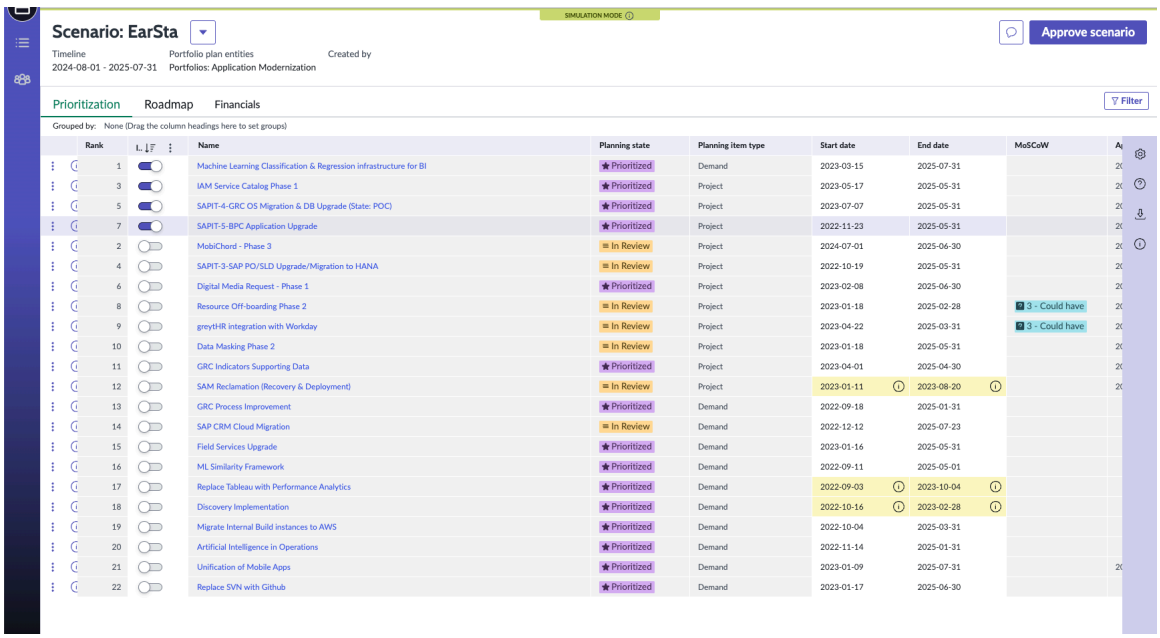


Optimizing planning with scenario planning in Portfolio Planning

As a portfolio manager, optimize your portfolio planning by comparing potential outcomes, assessing their alignment with strategic goals, and approving the best scenario as your live plan.

Scenario planning items in the Prioritization tab

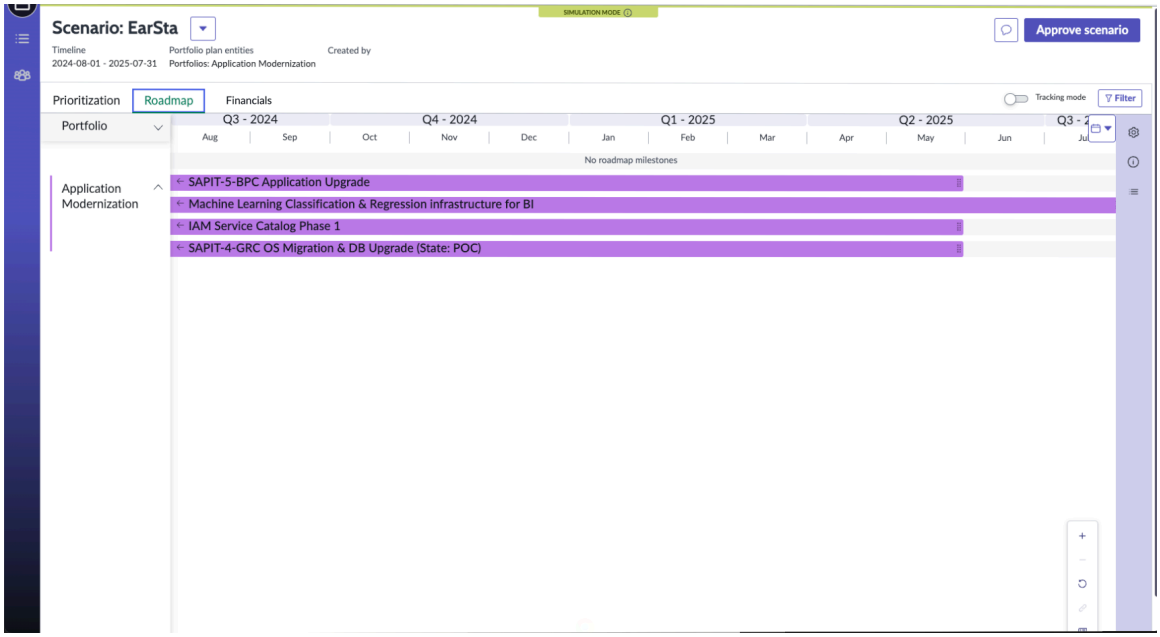
The **Prioritization** tab of the Scenario page enables you to add and remove planning items to/from a scenario and adjust their dates.



Scenario planning items in the Roadmap tab

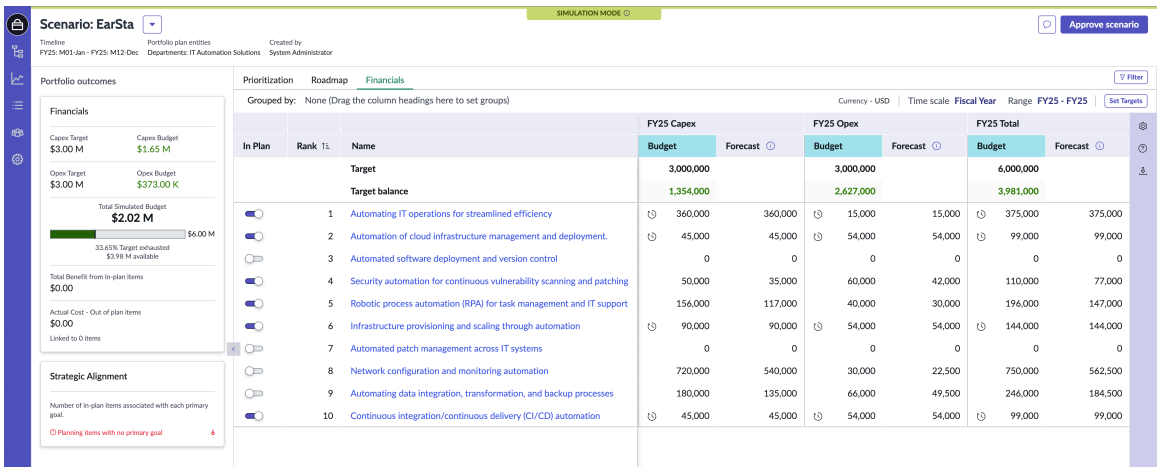
The **Roadmap** tab displays a Gantt chart-like view of the planning items in the scenario, showing their planned start and end dates across the portfolio plan timeline. Using the Roadmap tab, you can drag the bars representing planning items across the timeline to adjust their dates.

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Scenario planning items in Financials tab

The **Financials** tab of the Scenario page enables you to set custom targets, budget, and compare the allocated budget against target using the outcomes panel.



Portfolio Manager can simulate multiple scenarios with different budget combinations and compare their outcomes to arrive at an informed decision to balance the resources and strategic objectives. Using the financials view in Scenario planning, you can get a simulation mode for the financial information. Using this view, Portfolio managers working on the portfolios, can set a portfolio budget target for a particular planning cycle, which could be a monthly, quarterly, yearly, or beyond a year up to 5 years. Using this defined budget, portfolio users can prioritize the planning items within the portfolio to analyze if the prioritized items can be executed within their portfolio budget, while reviewing the monetary benefit from the prioritized items.

Important:
Enable the budget allocation property to allocate budget to your planning items at portfolio-level and configure the budget attributes to allocate budget by expense type or cost type.

Create multiple scenarios to compare them, and work with your stakeholders to approve an ideal plan with better monetary benefit returns. Once approved, the approved Scenario will become your new portfolio plan for the defined planning cycle. For more information to know about the

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changes happening in a portfolio after scenario approval, see Approve a scenario in Strategic Planning.

You can perform financial scenario planning throughout your planning or execution cycle depending on your organization needs such as at your regular planning cycles, quarterly reviews, or financial review cycles. Financials in scenario planning helps you to arrive at an informed decision and customize the portfolio planning to match with your organization needs.

Note:

- Financials in scenario planning is supported only for Epics, Projects, and Demands type of planning items.
- Customers using the Legacy Investment Funding should migrate to new experience to work on the financial scenario planning.

Personalize your scenario planning financials view using the Time scale and Range filters. Manage the budget of your planning items by monthly, quarterly, or yearly cadence depending on the planning cycle of your organization.

Outcomes panel in Scenario planning

The outcomes panel in the simulation indicates the financial information of the portfolio such as target and budget amounts for Capex and Opex, set budget target for this simulation, utilized and remaining budget from the target, benefit from the In-plan items, and the actual costs accounting from the out of plan items. The aggregated data is fetched based on the portfolio timeline range including the target and budget data.

Representations in outcomes panel for the identification.

Outcomes panel representation

Indication	Definition
Red text for amount without progress bar indication for Total Simulated Budget	No defined or set target amount for this scenario.
Red text for amount and red progress bar for Total Simulated Budget	Total allocated budget for planning items exceeds the scenario's set target amount.
Red text amount for Capex Budget	Capex Budget allocations exceed the scenario's Capex target.
Red text amount for Opex Budget	Opex Budget allocations exceed the scenario's Opex target.
Green text for budget amounts and green progress bar	Budget allocation for each expense types and total budget is within the scenario's set target.

Scenario planning features

In scenario planning, you can perform the following actions:

Feature	Description
Create a scenario in Portfolio Planning	Create a scenario from the current plan, or another scenario, in a simulated environment to compare the scenario with the live plan and other scenarios.

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Feature	Description
Compare scenarios in Portfolio Planning	Compare scenarios and the live plan side by side to review tradeoffs and items added or removed from the plans.
Approve a scenario in Portfolio Planning	Approve the best scenario.
Manage scenarios in Portfolio Planning	View list of scenarios, rename scenarios, and delete scenarios.

Scenario planning use cases

The following are high-level use cases for scenario planning.

- Fiscal year planning: Megan Burke, Portfolio Manager at ACME Inc, is planning for the next fiscal year and is required to prioritize planning items and align them with the organizational strategic goals. Megan creates a scenario for the portfolio plan and then uses the Prioritization tab to align items with goals. Megan holds discussions with program managers and with the financial team, creates multiple scenarios, and compares them. Megan approves the optimal scenario as a well-aligned strategic portfolio plan for the next fiscal year.
- Mid-cycle reprioritization; Changed priorities emerging mid-year require adjustments to the current portfolio plan. John Doe, the product manager at ACME Inc, creates a scenario and incorporates the changed priorities. John adjusts the plan based on the program manager's and financial team's feedback and finalizes the plan.

Create a scenario in Portfolio Planning

Create a scenario from a live plan or another scenario in a simulated environment to compare the scenario with the live plan and other scenarios.

Before you begin

Role required:

- sn_align_core.apw_user
- sn_align_ws.spw_financial_user - to view and edit financial details.

About this task

Creating a scenario enables you to visualize and anticipate potential outcomes. You can create a scenario based on the live plan or on another existing scenario. Once you have created one or more scenarios, you can compare them side by side with the live plan and approve the most desirable scenario. The scenario you approve becomes the live plan.

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. Select **Create scenario**.

> **Note:**
> Before you have created your first scenario, you see the **Scenario planning** button on the Scenario page. In such a case, select **Scenario planning** and then you see the **Create scenario** button.

   a. Enter a name for your scenario in the **Scenario name** field.

   b. **Optional:** Enter the details of your scenario in the **Description** field.

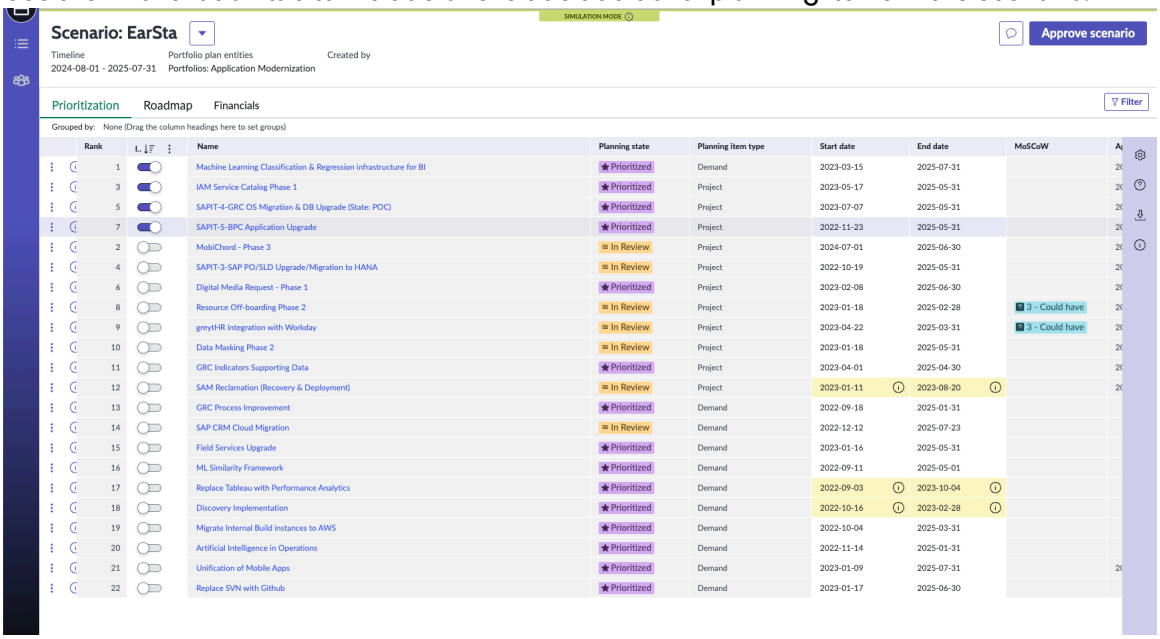
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c. In the **Copy From** field, select the *Current Plan* or the name of an existing scenario based on which you want to create the scenario.

d. Select **Create**.
The Scenario planning- [Scenario Name] page appears with the Prioritization tab open. The Prioritization tab lists all the planning items that you have in the live plan, or in the existing scenario that you copied the scenario from. The planning item start and end dates are determined based on the dates specified in the live plan or the actual execution dates.

- **In Plan** toggle: By default, the **In Plan** toggle is switched on for planning items that have the planning state as Prioritized or Done and have their start dates within the portfolio plan timeline. The **In Plan** toggle is turned off for items that have the status New, In Review, or Canceled.
- Yellow highlights for out of range dates: The planning item dates that are out of range of the portfolio plan timeline are highlighted with a yellow background. For such items, the **In Plan** toggle is turned off.

4. Use the Prioritization tab to include or exclude additional planning items in the scenario.



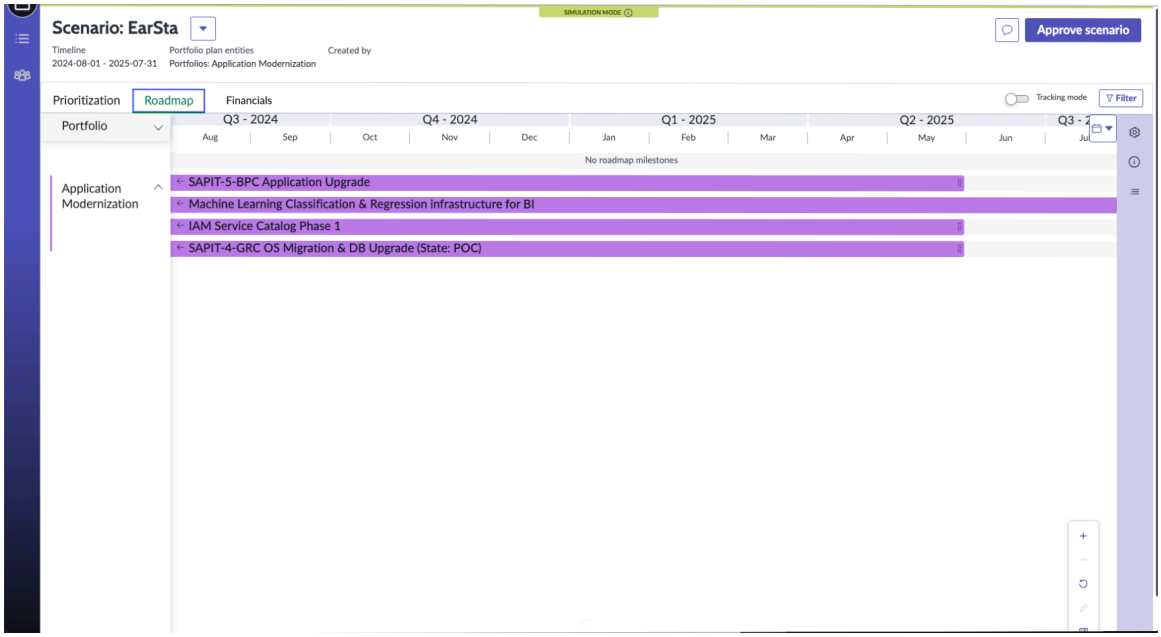
a. **Optional:** To exclude a planning item from the scenario, turn off the **In Plan** toggle.

b. **Optional:** To include a planning item in the scenario, edit the start and end dates of the item to fall within the portfolio plan timeline, and then turn on the **In Plan** toggle.

If you include out-of-timeline items in a scenario, these items remain in the scenario during the planning and prioritization process. When the scenario is approved, the dates of these items are updated to align with the scenario dates. However, because these updated dates fall outside the original portfolio plan timeline, the items are moved out of the live portfolio plan.

5. Use the **Roadmap** tab to view planning item dependencies and adjust planning item dates:

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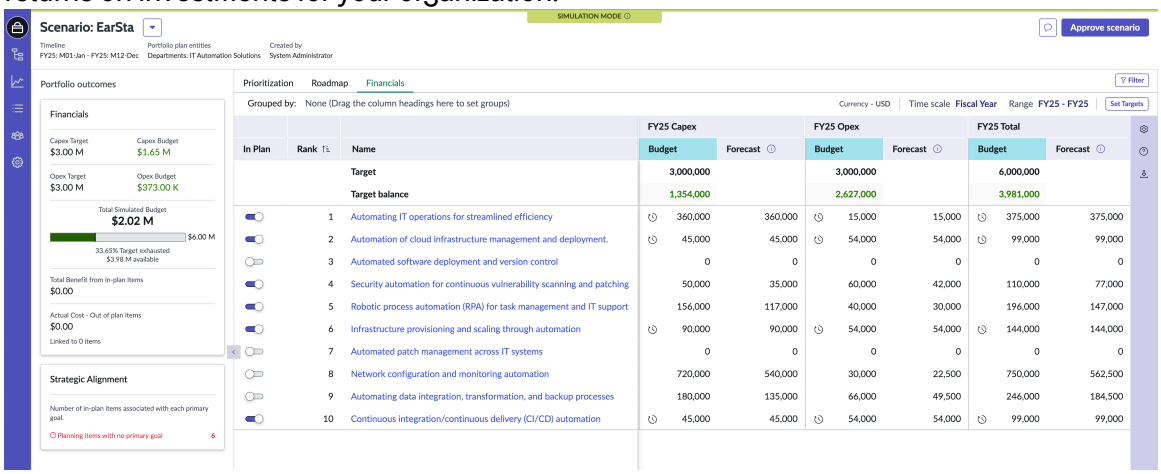


a. Drag the start or end of the planning item bars to change their start or end dates.

b. Drag the planning item bars to shift them in the plan timeline.

c. View the dependencies and milestones of the various planning items.

6. Use the **Financials** tab view the prioritize, invest, and execute the right items to provide best returns on investments for your organization.



a. Set target for your portfolio budget.

i. Select the **Set Targets** (

) button.

ii. In the Set Targets window, set budget for an expense type or a cost type using the inline edit feature.

> **Tip:**
> You can change the **Time scale** and **Range** to set targets for each fiscal period at monthly, quarterly, or yearly cadence to meet your organization's planning cycle. The target set for a higher timescale, it is equally split it between the fiscal periods.

Once the target is set for a scenario, the **Target** row displays the defined target amount by fiscal period and budget allocation choices.

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b. Include or exclude planning items in scenario using the **In-plan** toggle.

c. Add or reduce budget for individual planning items using the inline editing feature.

Changes made to the budget using while creating a scenario are marked with icon.

What to do next

- Create more scenarios, if necessary.
- Compare scenarios in Portfolio Planning. You can directly compare scenarios from simulation mode by selecting **Compare scenarios** from the Scenario actions list.
- Approve a scenario in Portfolio Planning.

Compare scenarios in Portfolio Planning

Compare scenarios side by side to evaluate comprehensive planning, optimize resource usage, confirm feasibility, and financial information.

Before you begin

Verify that you have created one or more planning scenarios and selected planning items for execution. For more information, see Create a scenario in Portfolio Planning.

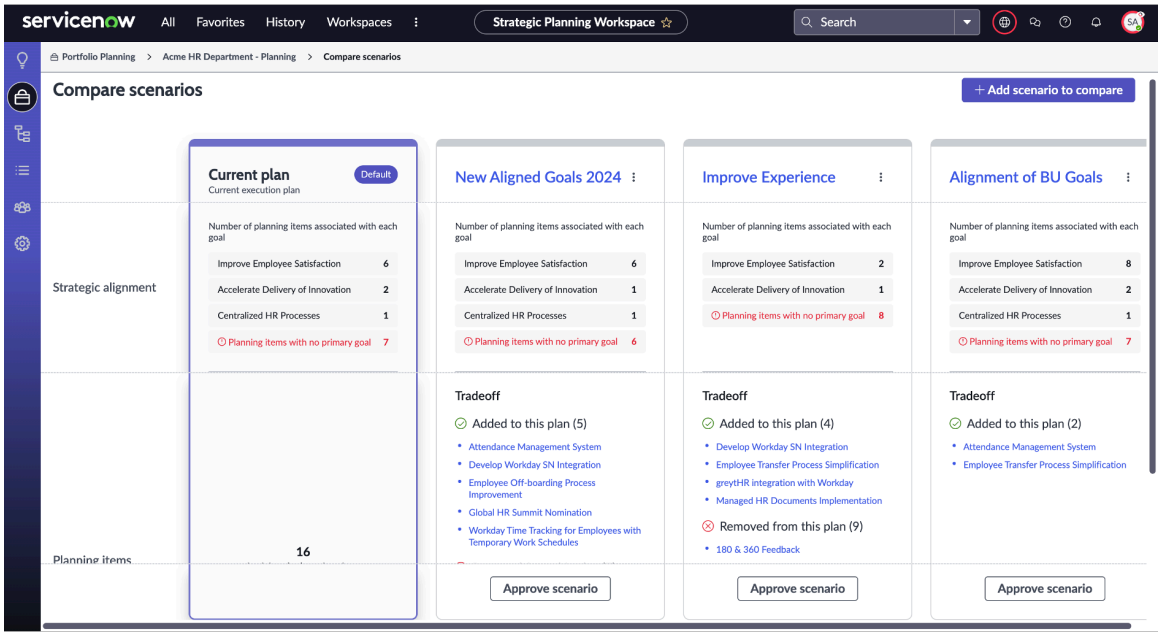
Role required:

- sn_align_core.apw_user
- sn_align_ws.spw_financial_user - to view the financial widgets.

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. From the Create scenario menu, select **Compare scenarios**.
   The Compare scenarios page appears.
4. Select **Add Scenario To Compare** and select or deselect scenarios to be included in the comparison.
   You can add up to five scenarios to the comparison.
5. Select **Compare**.
   You can also view the Compare Scenario page by selecting **Compare Scenarios** from the Scenario Actions menu in the Scenario page. The Compare Scenario page appears with the scenario open in the Scenario page included in the comparison with the current plan.
   The selected scenarios appear side by side on the Compare Scenario page.
6. Compare different aspects of the scenarios such as Budget vs Target, Benefit, Budget distribution, trade offs.

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Note:
Cost and benefit widgets in compare scenarios page reads the live data of **In-Plan** items for which the budget isn't manually changed while scenario planning.

Visual cues in scenario comparison

Criteria	Description
Removed from this plan	Items that are removed from the plan when the scenario is approved, are marked with a red X.
Added to this plan	Items that are added to the plan, when the scenario is approved, are marked with a green checkmark.

The following are some indications of the suitability of a scenario for approval:

- All planning items providing a focused strategy that supports the organization's objectives effectively.
- The trade-off section includes relevant items, demonstrating comprehensive and inclusive planning that addresses various aspects of the project or initiative.
- The scenario is realistic and achievable, considering current constraints and capabilities, confirming that planned actions can be executed within the given timeframe and budget.
- Better benefit from financial planning using the widgets, Budget vs Target to validate the allocated budget against the set targets, Benefit to identify scenario with better monetary benefit, and Budget Distribution.

7. **Optional:** Select the **Approve Scenario** button relevant to a scenario to approve it.
   For more information about approving existing scenarios in the Portfolio Planning Workspace, see Approve a scenario in Portfolio Planning.

What to do next

Approve a scenario in Portfolio Planning

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Approve a scenario in Portfolio Planning

Approve a scenario that aligns with your organizational goals and offers the best business outcomes to make the scenario your current plan.

Before you begin

Ensure that you have compared the scenarios and selected the one you want to approve. For more information, see Compare scenarios in Portfolio Planning.

Role required:

- sn_align_ws.scenario_approver
- sn_align_ws.spw_funding_user - to view and approve the financial changes.

About this task

When you approve a scenario:

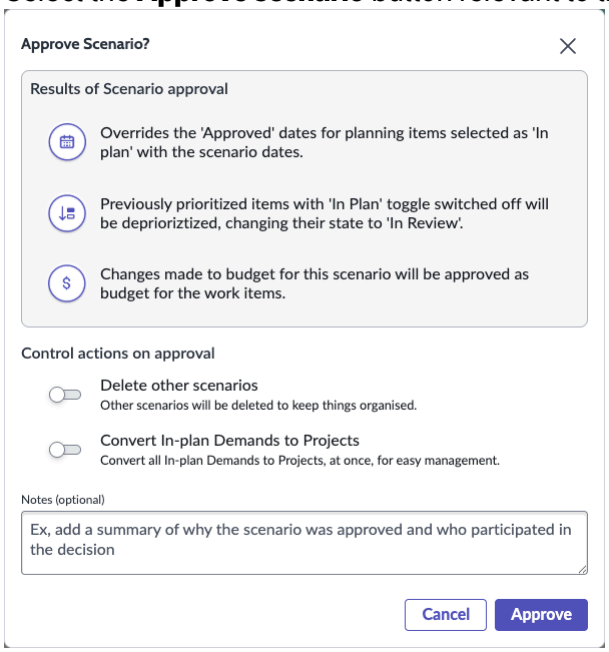
- Planning items with the In Plan state are updated to the Prioritized state.
- Planning items that you moved out of the plan are changed to the In Review state.
- The approved dates are revised accordingly.
- Changes made to the budget of a planning item will be approved as the budget.

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. From the Create scenario menu, select **Compare scenarios**.

   The **Approve scenario** button is also available on the Scenario page. As soon as you have created a scenario, you can directly approve a scenario without comparing it with the other scenarios.

4. Select the **Approve scenario** button relevant to the scenario that you want to approve.



While approving a scenario, you can:

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- Select **Convert In-plan Demands to Projects** toggle to convert the prioritized demands to projects automatically and build a functional portfolio plan.
- Delete the remaining scenarios by selecting the **Delete other scenarios** toggle.
- Enter a reason for approving the scenario in the Notes field.

5. Select **Approve**.

Manage scenarios in Portfolio Planning

Use the Manage scenarios option to view a list of all scenarios, rename scenarios, or delete scenarios.

Before you begin

Role required:sn_align_core.apw_user

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. Navigate to **Create Scenario** > **Manage Scenarios.**.
   You can also select **Manage Scenarios** in the Recent Scenarios menu in the Scenario page.
   The Manage scenarios dialog appears with the list of scenarios relevant to the current plan.
4. Do any of the following actions.

Using capacity planning in Portfolio Planning

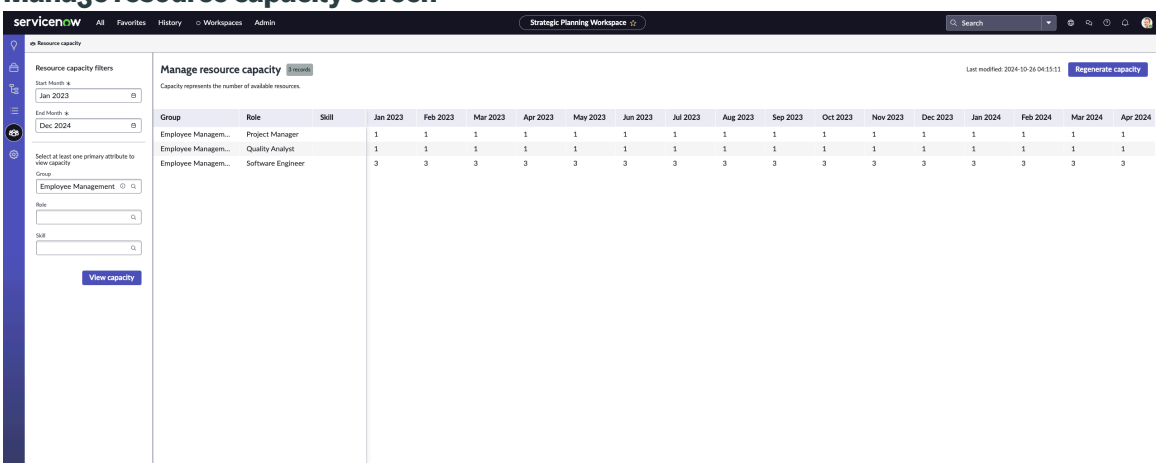
Assess the resource capacity and review existing allocations, which help you to make informed decisions while working on assigning resources.

Use the manage resource capacity screen to generate resource capacity details.

Use the Capacity Planning screen to view detailed information about the resource capacity mapping to a portfolio.

Manage resource capacity

Manage resource capacity screen



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Using Manage resource capacity, select a time frame and primary attributes to view number of available resources. Generated resource capacity details are saved. You can regenerate capacity to view latest changes in the resource availability.

Resource capacity screen helps you to view the following data.

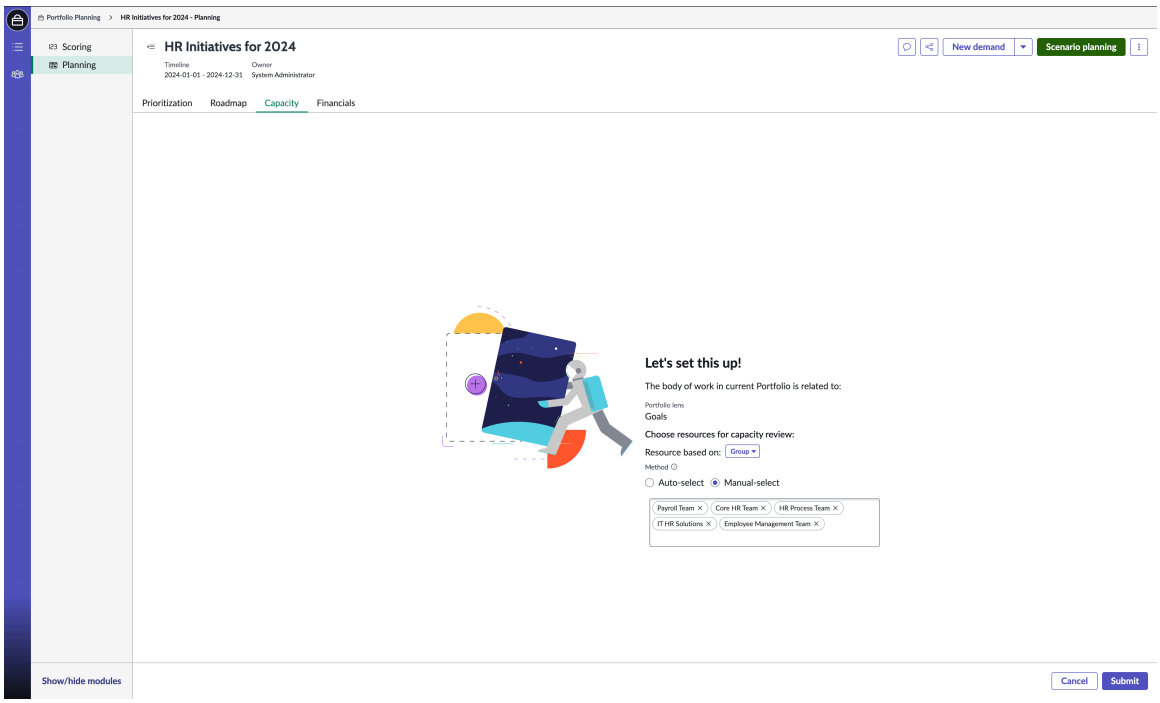
- Resource availability for generated capacity.
- Total number of available resources in a monthly breakdown view.
- Latest date of generating the capacity details.
- Option to regenerate and fetch the latest capacity details from the employee profile mappings.

On the Manage resource capacity screen, you can:

- Filter resources with specific capacity attributes for a required date range to view the number of available resources.
- Regenerate capacity details to view the latest details from the resource employee profile mapping.

Select resource criteria

- Select a primary attribute to automatically view the available groups, roles, or skills from the resource assignments of the prioritized planning items.
- Switch between **Auto-select** and **Manual-select** option to view the allocated resource efforts for all planning items or to view a custom data, respectively.
- Define resource criteria to view the available groups, roles, or skills from the resource assignments of the prioritized planning items.

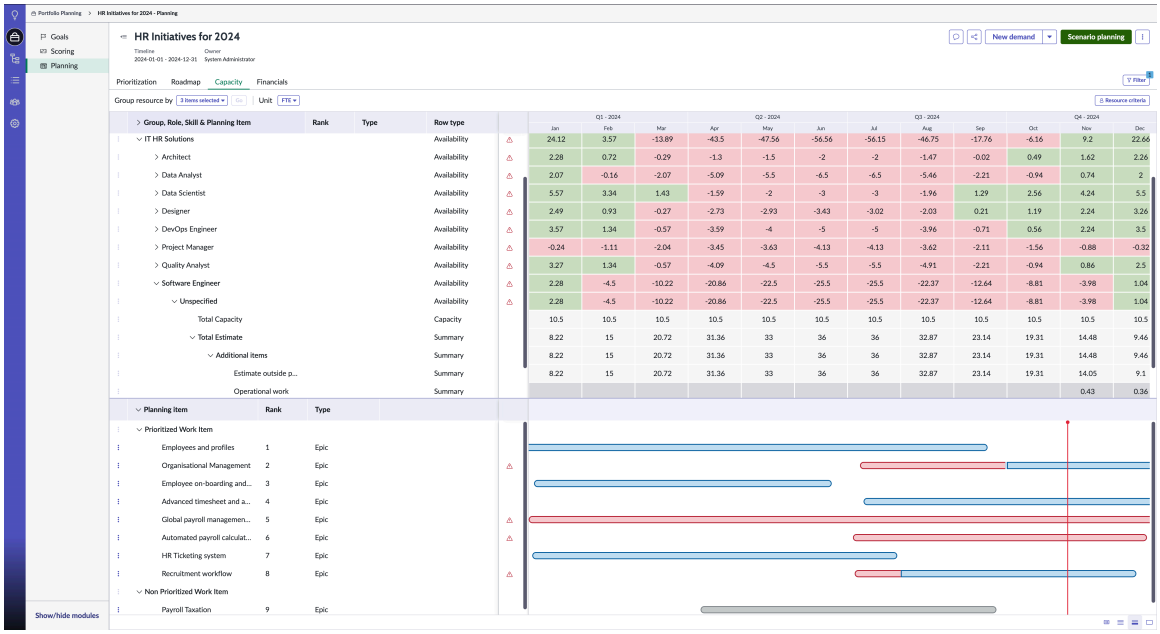


Capacity

Capacity screen displays the resource efforts from the prioritized planning items.

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- Comprehensive overview of resource capacity and allocations.
- Current resource capacity allocation.
- Interactive Gantt chat to view prioritized planning items in the bottom tray to analyze and plan work.



Understanding the Capacity screen.

Capacity legend

Color	Description
Yellow (Gantt bar)	Planning item with no resource assignments.
Blue (Gantt bar)	Resource estimates for Planning items are within the resource capacity.
Red (Cells and Gantt bar)	Overallocation in resource estimates.
Green (Cells)	Resource estimates within the resource capacity.

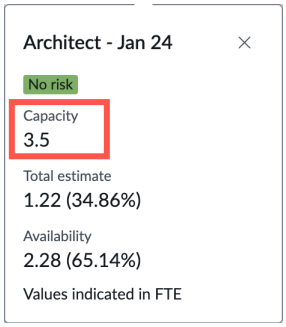
Using Capacity, you can:

- View the capacity allocations of prioritized planning items for your current portfolio and better forecast your future resource requirements.
- Use the filter option (Filter) to view planning items by their type, state, priority or any by any required attributes to create capacity plans.

> **Note:**
> Default filter is set to display prioritized planning items only.

- View the updated resource capacity based on the assigned operational resource assignments.
- View the total resource capacity in the heatmap view.

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- View total resource capacity and total estimates.
- View the efforts for operational work and efforts for estimates outside of portfolio in the **Additional items** list.
- Redefine the workforce criteria by selecting **Resource criteria** ( )

Example: Calculation of Operational Resource Assignment in Capacity

As a Resource Manager, you can create operation resource assignments or migrate existing operational resource plans of your employees to handle the required meetings, trainings, time off and so on to meet your work requirements.

Consider a group with capacity of 2 FTE and resource manager creates a Group type operation resource assignment for 10% of the capacity for training. This operational assignment can be viewed in the **Operational work** line item in the top-tray of the Capacity screen. The value of the **Operational work** line item will be 0.2, which is 10% of total capacity of the group.

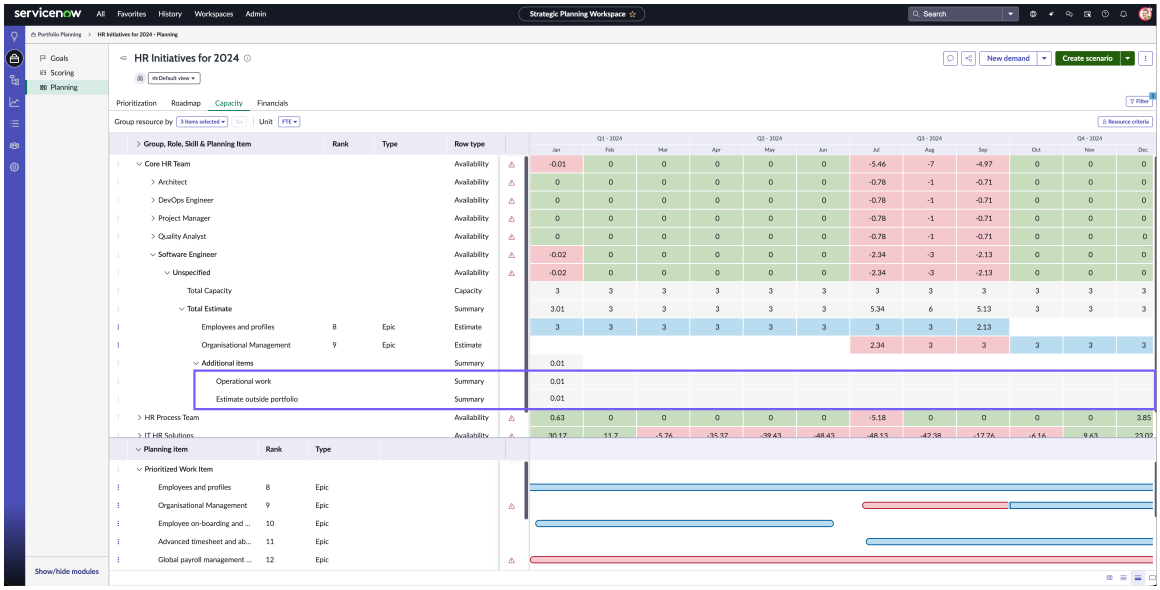
When a resource manager creates a Group type operation resource assignment for time off, this doesn't update the **Operational work** line item but reduces the total available capacity.

Consider the same group for which resource manager creates an operation resource assignment for 25% of the capacity for time off, for a quarter from April to June. The total available capacity of the group for the quarter April to June will be 1.5 FTE, which is 75% of the total capacity after reducing the 25% time off.

0.5 FTE, which is 25% of total capacity of the group will be reduced.

Note:
The **Operational work** line item is highlighted in gray color.

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Generate resource capacity

Generate and view the total capacity of the resources with primary attributes. Capacity details helps Portfolio Managers to plan and manage planning items depending on the resource availability.

Before you begin

1. Enable planning attributes for capacity planning. For more information, see Enable planning attributes for capacity in Portfolio Planning.
2. Generate employee profiles for resources. For more information, see Generate employee profiles for resources to work with Capacity.

Role required: sn_align_ws.spw_capacity_user

Procedure

1. Navigate to **Workspaces** > *Portfolio Planning Workspace*.
2. Select the **Resource capacity** option ( ).

> **Note:**
> If planning attributes aren't enabled for capacity planning, you see an empty state screen with an option to configure. Contact your admin to enable planning attributes for capacity planning. For more information, see enable planning attributes for capacity planning.

3. Use one the following options to view and regenerate the capacity details.

What to do next

Use Capacity Planning to view the resource capacity, resource-to-work mapping and re-prioritize resource allocations to effective execute your prioritized planning items.

Using Capacity in Portfolio Planning

View and analyze the resource capacity for your portfolio to plan and re-forecast the resource assignments.

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Before you begin

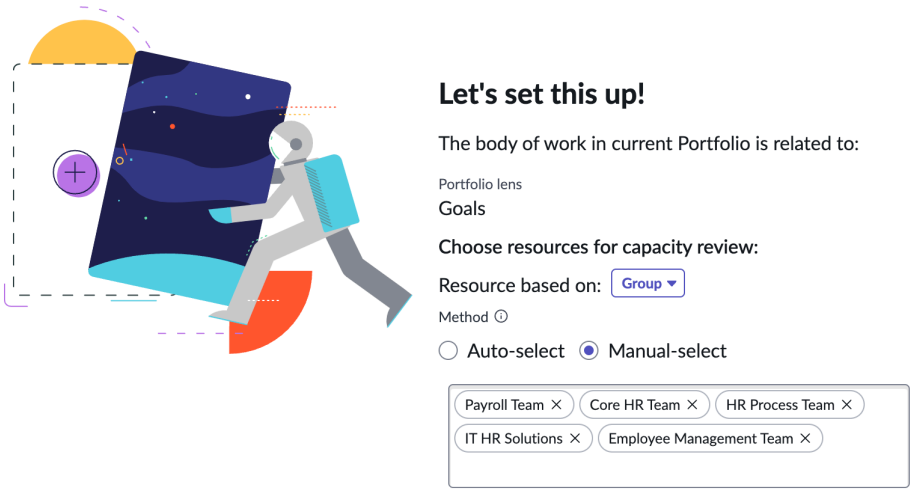
Generate resource capacity using Generate resource capacity.

Role required: sn_align_ws.spw_capacity_user

Procedure

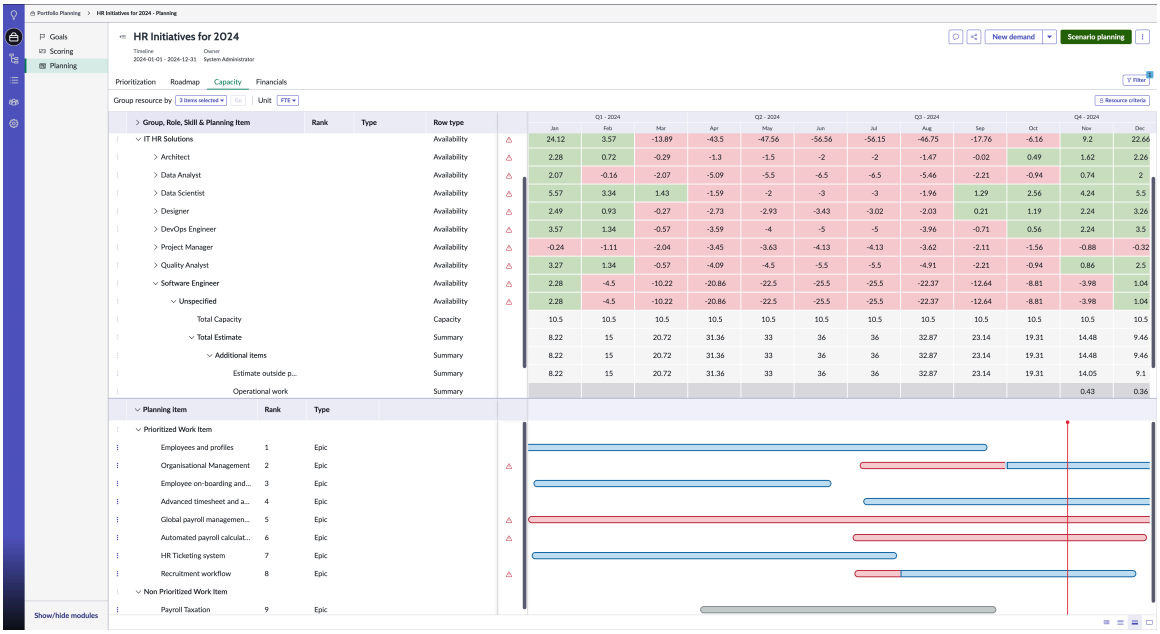
1. Navigate to **Workspaces** > *Portfolio Planning Workspace*.
2. Select a plan from Portfolio Plans.
3. Select **Planning** > **Capacity**.
4. Define a resource criteria by selecting a primary attribute from the list.
   If you select Group, all the available groups from the resource assignments of the prioritized planning items are automatically displayed in the Auto-select option. You can add or remove the suggestions to view the resource capacity using the Manual-select option.

Tip:
You can always redefine and change the resource criteria to view custom results using the **Resource criteria** ( ) button.



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5. Select **Submit**.



Result

The Capacity screen for resource capacity allocation for the selected workforce criteria is displayed. Based on the workforce criteria selection, the resource capacity is nested by Group, Skill, and Role.

Managing financials for planning items in Portfolio Planning

Manage budget, cost plans as forecasts, actual expenses as expense lines, generate labor costs, create financial baselines, and view, analyze, and compare the financial performance of your planning items at required cadence in Portfolio Planning Workspace.

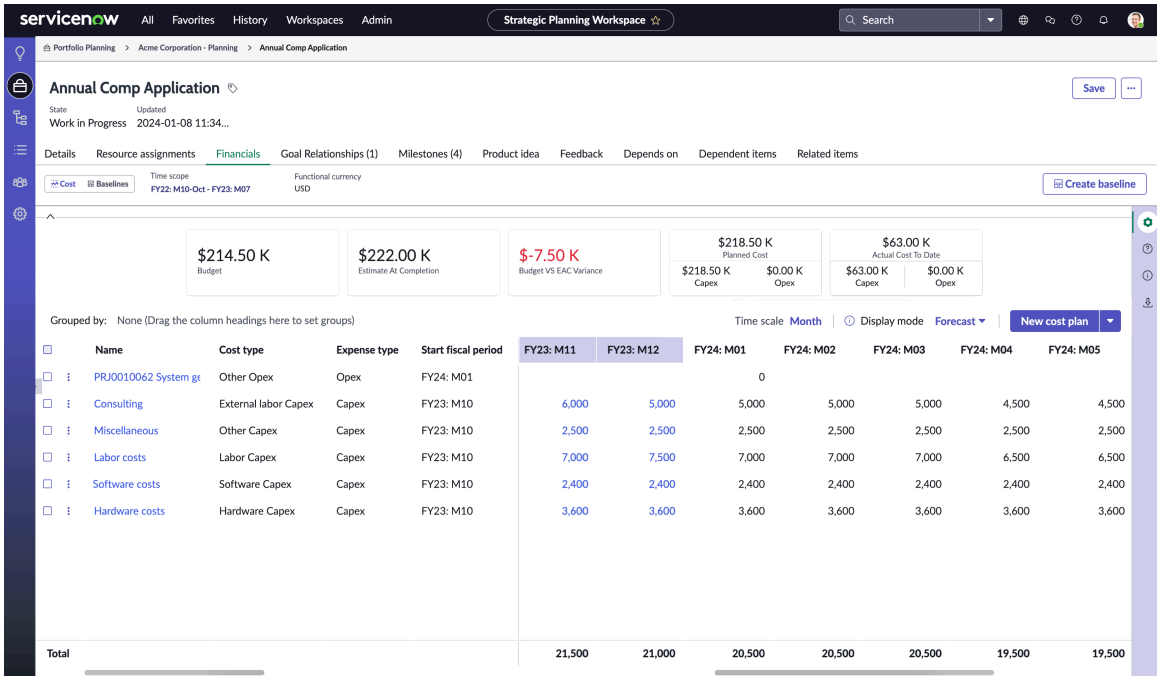
The comprehensive financials view helps you to understand planned and actual costs, Forecast (previously EAC - Estimate At Completion), Remaining Estimates (previously ETC - Estimate To Completion), Actual (previously Actuals to date), and so on, for the selected item. You can manage cost plans and associate the expense lines and process them to reflect the actuals for a planning item.

Export the financials data from Cost or Baselines comparison view as Microsoft Excel or a CSV file and share it with your stakeholders to review the financial performance of your planning items and portfolio.

Cost view

Forecast your planned costs, create, and manage cost plans and expense lines to track the financial performance of your planning items, review the latest costs and actuals.

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In the Cost screen, you can:

- As a Project Manager, you have the enhanced visibility and ability to manage the financial data across multiple project levels. Cost view of financials shows cost plans and expense lines from sub-projects, allowing you to track the finances.
- The parent project widgets display the consolidated values of forecasted costs and expenses.
- Identify and manage costs using the **Project/Demand** column for any sub project or demand directly from Cost view of the parent planning item.
- Re-forecast all the cost plan values for future fiscal periods by double-clicking to edit the value in the least time scale view, either by month or by period.
- Manage cost plans for your planning items. For more information, see Add, edit, or delete cost plans.
- Add or edit expense lines for your planning items to record any planned or unplanned expenses. For more information, see Add or edit expense lines.
- Generate labor costs for the fiscal period. For more information, see Generate labor costs.
- Create and compare baselines to capture the financial snapshot of your planning items. For more information, see Create and compare financial baselines for demands and projects.
- Configure widgets to get a high-level overview of the financial data for your planning item.
- All financial details from sub-projects will be aggregated and displayed in the parent project's cost plans and widgets.

Tip:
Cost view gives you enhanced user experience to customize the left pane columns by using the personalize icon ( ) and by saving user preferences to retain the customizations made to hide, view, or adjust columns, time scope viewing, and so on.

Display modes

On the financials page for a planning item in Portfolio Planning Workspace, you have Display Mode drop-down switch between different modes to view different formats of financial

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information of your planning items. These views provide the relevant and focused information which helps project managers and funding users to work on the financial planning.

- Forecast
- Budget vs forecast
- Planned vs actual
- Planned

Users with financial funding role [sn_align_ws.spw.funding_user] will see Budget allocation option instead of the Budget vs forecast.

Display modes value

Mode	Value
Forecast	View Actuals, Remaining estimates, and Forecast for the entire scope of the planning items. Use the time scale to view the actuals for the past fiscal periods and planned costs for the current and future fiscal periods.
Budget vs forecast	View the Budget, Actuals, and Variance for the fiscal periods and Forecast values for the entire scope of the planning items. Using this mode, you can: • Compare the latest forecasts with the approved budget at different time scales. • View the budget vs actual for past fiscal periods and budget vs planned for current and future fiscal periods at fiscal period level.
Budget allocation (funding role)	View the Budget, Actuals, and Variance for the fiscal periods and Forecast values for the entire scope of the planning items. Using this mode, funding users can: • View the latest forecast and enter the budget that can they be approved to the work item. • Analyze the variance for the past fiscal periods and work on budget allocation for future fiscal periods. • Compare latest forecast with approved budget and revise the budget, if required.
Planned vs actual	Compare the planned costs with actual expense for the past and current fiscal periods, and view planned costs for the future fiscal periods.

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Display modes value (continued)

Mode	Value
Planned	View only planned costs for the full range and manage the planned costs using the inline editing feature.

Note:

- If you do not see the Budget allocation or Budget vs forecast display options, enable the budget allocation property and configure the budget attribute at instance level.
- To work on budget allocation using the Next Experience, Activate a scheduled job to migrate budget of your planning items.

The last selected view is saved as user preferences.

Default display mode and access level for financial users

User role	Default mode	Role-level access
sn_align_ws.spw_funding_user	Budget Allocation	Allocate and approve budget, manage cost plans and expenses lines.
sn_align_ws.spw_financial_user	Forecast	Manage cost plans and expense lines.
business_stakeholder	Forecast	View financial data.

Baseline view

Create a baseline to capture a snapshot of the financial changes for your planning items. You can create on-demand baselines or at a cadence using a scheduler job.

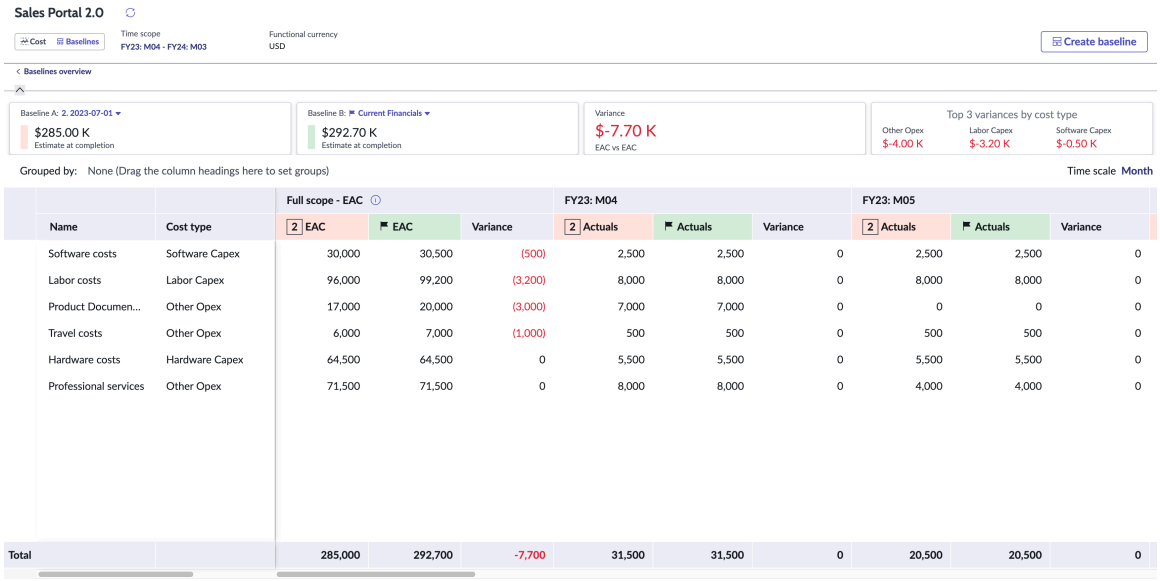
Note:
Baselines created on the parent project includes the cost plans and expense lines from all of the child projects. This integrated calculation provides a better breakdown of the financial performance of the projects and sub-projects.

Compare baselines to compare the difference in costs between latest status against a baseline or between any two baselines.

Note:
Each baseline is tagged with a number based on the order that they're created. The Current Financials baseline captures the financials data in real-time and is always represented with a flag icon ( ).

The baselines comparison view helps you to understand the variances between the two baselines.

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		Full scope - EAC			FY23: M04			FY23: M05		
Name	Cost type	2 EAC	EAC	Variance	2 Actuals	Actuals	Variance	2 Actuals	Actuals	Variance
Software costs	Software Capex	30,000	30,500	(500)	2,500	2,500	0	2,500	2,500	0
Labor costs	Labor Capex	96,000	99,200	(3,200)	8,000	8,000	0	8,000	8,000	0
Product Documen...	Other Opex	17,000	20,000	(3,000)	7,000	7,000	0	0	0	0
Travel costs	Other Opex	6,000	7,000	(1,000)	500	500	0	500	500	0
Hardware costs	Hardware Capex	64,500	64,500	0	5,500	5,500	0	5,500	5,500	0
Professional services	Other Opex	71,500	71,500	0	8,000	8,000	0	4,000	4,000	0
Total		285,000	292,700	-7,700	31,500	31,500	0	20,500	20,500	0

Use the widgets when you compare baselines to view:

- Two dedicated widgets for each baseline displaying the EAC.
- Third widget displays the total variance between the EAC values of the selected baselines.
- Fourth widget displays the top three variances contributing to the overall variance by cost type.

The widgets and the header rows are color-coded to help you identify the selected baselines.

Tip:
Switch between different baselines from the comparison view by selecting the name of a baseline from one of the widgets.

When you compare baselines, you get the list of cost plans with their associated costs types, EAC at full scope, and a breakdown view of actual expenses and planned costs.

By default, the time scale of the breakdown view is set to Month.

- Use the **Time scale** option to view the comparison breakdown view at monthly, quarter, and yearly levels.
- Select **Time scope** to filter fiscal periods, data in the widgets, and the comparison table.

The widgets and the header rows are color-coded to help you identify the selected baselines.

Tip:
Select the name of a baseline from the first or second widget to compare different baselines.

Let's take an example of the comparison view of two baselines: 2023-10-01, Baseline A, and Current Financials, Baseline B.

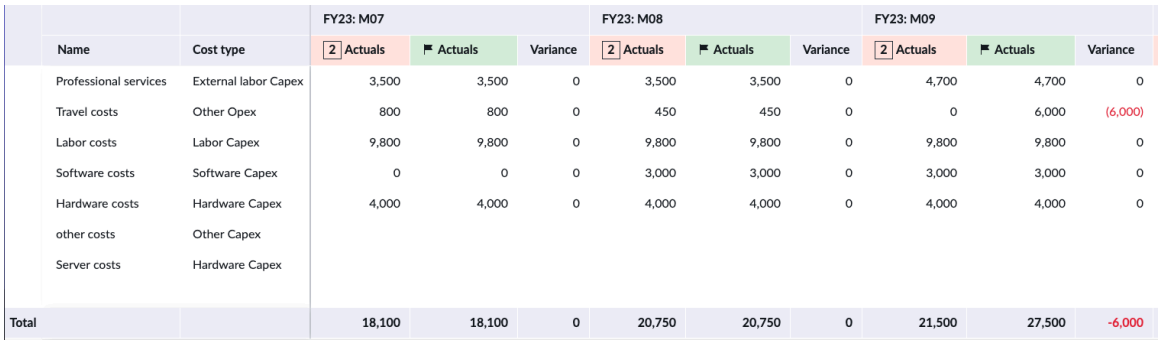
Example: How actuals, planned, and EAC are compared between two baselines captured at different timestamps

For a selected baseline, based on the creation date, the table shows Actuals values for the past fiscal periods from the created date and Planned values for the current and future fiscal periods.

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Consider a planning item scoped from July 2023 to June 2024. Baseline A is created on 2023-10-01. If you compare the Current Financials baseline in December 2023 to the baseline captured in October 2023:

1. The baseline comparison view show Actuals vs Actuals columns from July 2023 to September 2023.

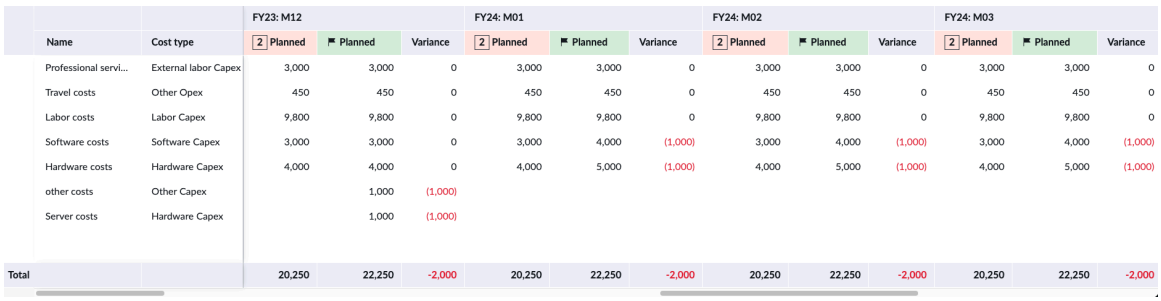


			FY23: M07			FY23: M08			FY23: M09		
	Name	Cost type	2 Actuals	Actuals	Variance	2 Actuals	Actuals	Variance	2 Actuals	Actuals	Variance
	Professional services	External labor Capex	3,500	3,500	0	3,500	3,500	0	4,700	4,700	0
	Travel costs	Other Opex	800	800	0	450	450	0	0	6,000	(6,000)
	Labor costs	Labor Capex	9,800	9,800	0	9,800	9,800	0	9,800	9,800	0
	Software costs	Software Capex	0	0	0	3,000	3,000	0	3,000	3,000	0
	Hardware costs	Hardware Capex	4,000	4,000	0	4,000	4,000	0	4,000	4,000	0
	other costs	Other Capex									
	Server costs	Hardware Capex									
Total			18,100	18,100	0	20,750	20,750	0	21,500	27,500	-6,000

2. Planned vs Actuals for October 2023 and November 2023.

		FY23: M10			FY23: M11		
Name	Cost type	2 Planned	Actuals	Variance	2 Planned	Actuals	Variance
Professional servi...	External labor Capex	3,000	3,000	0	3,000	4,000	(1,000)
Travel costs	Other Opex	450	500	(50)	450	600	(150)
Labor costs	Labor Capex	9,800	9,800	0	9,800	9,800	0
Software costs	Software Capex	3,000	3,500	(500)	3,000	3,000	0
Hardware costs	Hardware Capex	4,000	4,000	0	4,000	4,000	0
other costs	Other Capex		0	0		0	0
Server costs	Hardware Capex					1,200	(1,200)
Total		20,250	20,800	-550	20,250	22,600	-2,350

3. Planned vs Planned from December 2023 to June 2024.



			FY23: M12			FY24: M01			FY24: M02			FY24: M03		
	Name	Cost type	2 Planned	Planned	Variance	2 Planned	Planned	Variance	2 Planned	Planned	Variance	2 Planned	Planned	Variance
	Professional servi...	External labor Capex	3,000	3,000	0	3,000	3,000	0	3,000	3,000	0	3,000	3,000	0
	Travel costs	Other Opex	450	450	0	450	450	0	450	450	0	450	450	0
	Labor costs	Labor Capex	9,800	9,800	0	9,800	9,800	0	9,800	9,800	0	9,800	9,800	0
	Software costs	Software Capex	3,000	3,000	0	3,000	4,000	(1,000)	3,000	4,000	(1,000)	3,000	4,000	(1,000)
	Hardware costs	Hardware Capex	4,000	4,000	0	4,000	5,000	(1,000)	4,000	5,000	(1,000)	4,000	5,000	(1,000)
	other costs	Other Capex		1,000	(1,000)									
	Server costs	Hardware Capex		1,000	(1,000)									
Total			20,250	22,250	-2,000	20,250	22,250	-2,000	20,250	22,250	-2,000	20,250	22,250	-2,000

Note:
The columns are defined to calculate EAC, which is the sum of Actual costs till the last fiscal period and Planned costs from current to future fiscal periods.

Budget allocation

Portfolio managers can manage and approve the budget for planning items. The approved budget helps project managers to plan and meet the expenses to execute work.

Plan and approve the budget for a shorter planning cycle at monthly, quarterly, or yearly level using the lean budgeting and funding feasibility. Lean budgeting helps Portfolio managers to track the value in return for the approved budget and to better plan the budget for future fiscal periods.

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Note:
If the budget is allocated monthly, the total budget is rolled up to quarterly and yearly level. Similarly, if the budget is allocated at a quarterly or yearly level, the equal breakdown happens till monthly level.

For more information on how to allocate, approve, and handle budget for planning items, see, Manage budget of your planning items in Strategic Planning.

Tip:
In the budget allocation view, Portfolio managers review the EAC to understand the financial projections made by Project managers and use the **Copy cost as budget** option to allocate the entire planned cost as budget.

Choose the cost type as the attribute to allocate and approve the budget for individual cost types such as labor, non-labor.

Project managers can view the approved budget at the required time scale using the Budget vs forecast option from the display modes. As the work progresses and the actuals are captured, you can compare the budget and actual costs using the Budget vs forecast mode and reforecast the planned costs where the actuals are exceeding the budget using the inline edit feature at the required time scale.

Product managers can compare the latest cost with the approved budget by Capex or Opex, cost types, and for the required time scale at monthly, quarterly, or yearly level. The comparison view provides insights to Product managers to locate any variance at expense type or cost type, and at which fiscal period. Product manager can leverage this information to request for additional budget from the Portfolio manager.

You can migrate the budget of existing active projects and demands items from the Classic UI to Next Experience. Financials in the Next Experience has new budget data model that facilitates to store the budget at a detailed level by monthly breakdowns and cost types. You can migrate the budget for active projects and demands individually or by bulk using the scheduled job.

- Migrate budget of active projects from Classic UI to Next Experience. For more information, see Migrate budget of active projects to Next Experience.
- Migrate budget of active demands from Classic UI to Next Experience. For more information, see Migrate budget of active demands to Next Experience.

Note:
The migrated budget is captured in the `sn_invst_pln_invst_budget` table to enable the lean budgeting for required time scope.

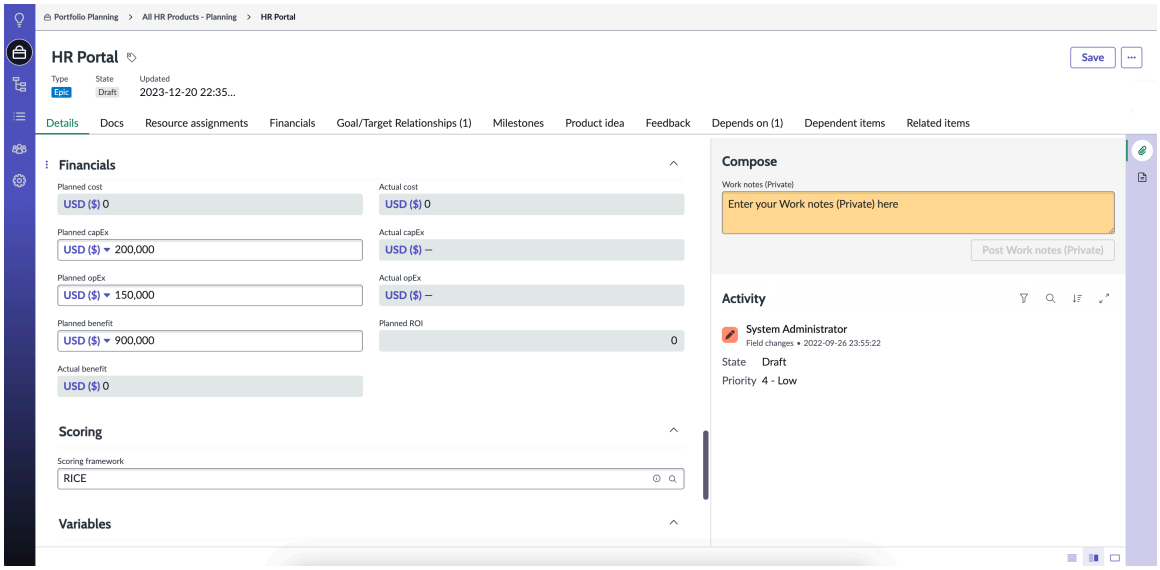
Benefit plans

Monetary benefit plans capture potential benefits accrued while executing a planning item. Non-monetary benefit plans capture the potential non-financial benefits accrued while executing a planning item. You can create and manage monetary benefit plans and non-monetary benefit plans to capture the potential benefits of your planning items.

Simple financials

Simple financials gives you the ability to enter the preliminary high-level planned capex, opex, benefit and so on from the Details page without capturing the costs plans from the Cost view. You can update the simple financials values as required until you have the planned and actual costs captured.

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Using the baseline feature, you can capture these simple financial values in a baseline and compare them against any existing baseline. You can:

- Reforecast simple financials and compare the by selecting the Current Financials from the list of baselines.
- Capture the planned and actual expenses as the project progresses and compare any financial baseline with a simple financials baseline to track the financial performance of the planning item.

Configure multicurrency for planning items

Select investment currency as an additional currency, which can be different from your functional currency, to manage financial records of your planning items.

Before you begin

- Enable monetary benefit plans for planning items
- Role required: admin

Procedure

1. Navigate to **Workspaces** > *Portfolio Planning* and select portfolio plan.
2. Select a planning item from the Planning module.
3. Select the **Financials** tab.
   In the **Currency** field, the current system currency is displayed. For example, if your Functional currency is in USD, the field is displayed as **USD (Functional)**.
4. Select **Confirm** to save the investment currency selection.

Add, edit, or delete cost plans

Create a cost plan for a required duration to track your planned and actual expenses. Edit cost plans to adjust your planned expenses and delete any de-scoped forecasts.

Before you begin

Role required: sn_align_ws.spw_financial_user

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Procedure

1. Navigate to **Workspaces** > *Portfolio Planning Workspace* and open a planning item.
2. Select the **Financials** tab.

> **Tip:**
> Create a financial baseline immediately after capturing the initial planned costs to have a snapshot of your planned costs. Use this baseline to compare it against the baselines from later dates, as the work progresses, to identify the variance between initial planned costs and actual expenses.

This helps you to plan for the future expenses and re-forecast the planned costs.

Manage budget of your planning items in Portfolio Planning

Allocate, manage, and approve budget for your planning items. Lean budgeting enables you to allocate budget for short planning cycles for different fiscal periods such as monthly, quarterly, or yearly breakdown level rather than allocating the budget to the complete duration of the planning item.

Before you begin

- As an Admin, enable the property to work on budgeting. For more information, see Enable financial budget allocation for planning items in Portfolio Planning.
- As an Admin, configure the attribute to allocate and approve budget by cost type or expense type. For more information, see Configure budget attribute at instance-level to allocate budget.
- Role required: it_portfolio_manager

Procedure

1. Navigate to **Workspaces** > *Portfolio Planning Workspace* and open a planning item.
2. Select the **Financials** tab.
3. Enable the **Budget allocation** toggle (Budget allocation).
4. You can manage the budget by one of the following ways for the selected time scale at monthly, quarterly, or yearly level.
   - Double-click each cell in the Budget column to manually enter the value.
   - Select **Copy cost as budget** from the Budget column options to copy the EAC as budget. You can always reforecast the budget for each cost type using the in-grid editing feature even if the EAC is copied as budget.

> **Note:**
> Unapproved budget values are indicated with icon.

5. Select **Approve budget** (Approve budget).
   Approve budget confirmation window is displayed. The **Create a financial baseline for this budget approval** option is enabled by default which captures the latest budget and financial estimates.

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Tip:
The financial baseline created while approving the budget can be compared with the future baselines once the actual expenses are captured to track financial performance.

6. On the confirmation window, select **Approve** (Approve).

Result
Budget widget is updated to reflect the latest approved budget. Project Manager can view the approved budget and compare it with the planned costs using the **budget vs cost** view by cost type.

Add or edit expense lines

Create or edit expense lines to capture the actuals costs. You can associate the expense lines with a cost plan or create standalone expense lines to record unplanned expenses.

Before you begin
Role required: sn_align_ws.spw_financial_user

About this task
An expense line is part of the project cost plans that can be associated with a specific source. You can create multiple expense lines for a cost plan. Only the expense lines that are in the processed state are considered for roll ups on the work item.
For unplanned expense lines which are not associated to any cost plan, system automatically creates an cost plan or associates to an existing system generated cost plan of the same expense type.

Procedure

1. Navigate to **Workspaces** > *Portfolio Planning Workspace* and open a planning item.
2. Select the **Financials** tab.
3. Add an expense line using one of the following options.

4. On the Create expense line form, fill the fields.
   For a description of the field names, see Create expense line form.
5. Select **Save**.

Generate labor costs

Generate labor costs in the Financials view for attribute-based resource assignments based on the financial attributes configured in the planning attributes page.

Before you begin
Role required: sn_align_ws.spw_financial_user

Procedure

1. Navigate to **Workspaces** > *Portfolio Planning Workspace* and select a planning item.
2. Select the **Financials** tab.
3. Select **Generate labor costs** (Generate labor cost).

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4. Select **Generate** on the Generate labor costs confirmation window.

Note:
Alternatively, you can activate a scheduled job to automatically create baselines at the required cadence.

Create and compare financial baselines for demands and projects

Create and compare financial baselines to get a snapshot of the project expenses and compare the planned costs against the actual expenses.

Before you begin

Role required: sn_align_ws.spw_financial_user

Procedure

1. Navigate to **Workspaces** > *Portfolio Planning Workspace* and select a planning item.
2. Select **Financials** from the left menu.
3. Create or compare baselines.

Tip:
You can migrate existing financials baselines of your projects or demands from Classic UI to Financials in Next Experience.

For more information on how to migrate financial baselines of demands, see Migrate financial baselines of demands to Next Experience.

For more information on how to migrate financial baselines of projects, see Migrate financial baselines of projects to Next Experience.

Manage monetary benefit plans for your planning items in Portfolio Planning

Create and manage monetary benefit plans to capture the potential benefits while executing your planning items.

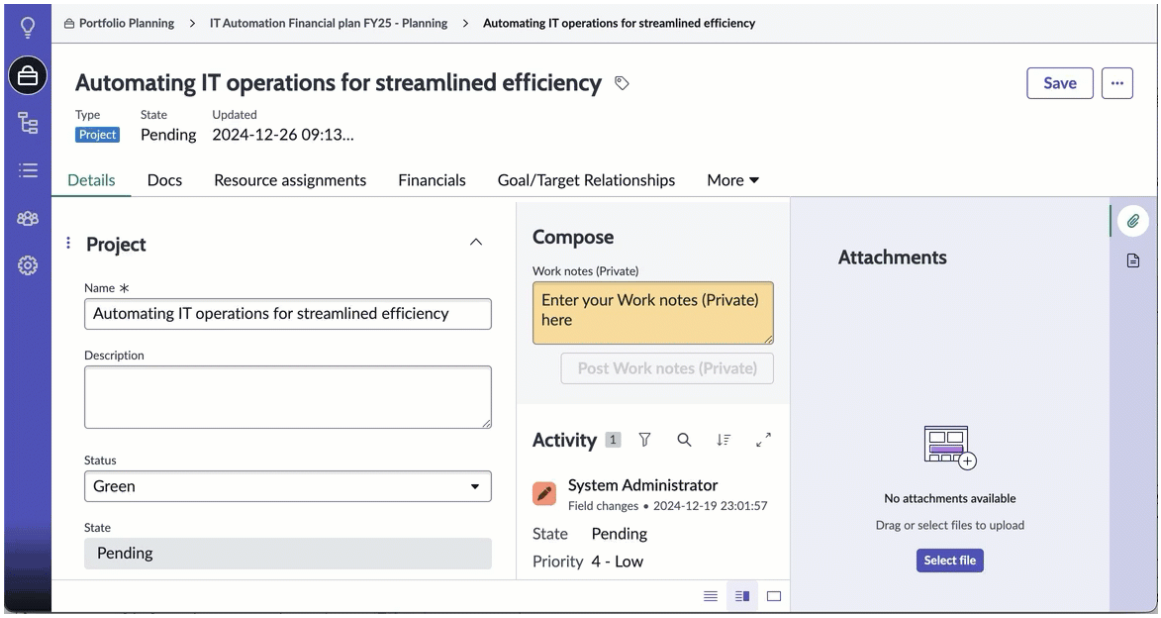
Before you begin

- Add monetary and non-monetary benefit plans related lists
- Role required: sn_align_ws.spw_financial_user

Procedure

1. Navigate to **Workspaces** > *Portfolio Planning Workspace* and select a Portfolio.
2. Select a planning item from the Planning module.
3. Select the **Monetary Benefit Plans** related list.

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4. On the Benefit Plan form, fill the fields.
   For a description of the field names, see Benefit Plan form
5. Select **Save**.

What to do next

- Edit monetary benefit plan.
- Capture actual monetary benefits.

Edit monetary benefit plan

Edit a planned monetary benefit plan to revise the benefits, dates, offset, and so on, to maintain the updated financial records as your work progresses.

Before you begin

- Manage monetary benefit plans for your planning items in Portfolio Planning
- Role required: sn_align_ws.spw_financial_user

Procedure

1. Navigate to **Workspaces** > *Portfolio Planning Workspace* and select portfolio plan.
2. From the Prioritization or Roadmap tab, select the planning item for which you want to edit a monetary benefit plan.
   The full details page of the planning item is displayed.
3. Select the **Monetary Benefit Plans** related list.
4. Select the name of a required benefit plan.
5. In the Details tab, edit the required fields and select **Save**.

Capture actual monetary benefits

Capture the actual benefit from the planned benefits to measure revenue and calculate the profits.

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Before you begin

- Manage monetary benefit plans for your planning items in Portfolio Planning
- Role required: sn_align_ws.spw_financial_user

Procedure

1. Navigate to **Workspaces** > *Portfolio Planning Workspace* and select portfolio plan.
2. From the list of portfolio plans, select a portfolio plan.
3. From the Prioritization or Roadmap tab, select the planning item for which you want to capture actual monetary benefits.
   The full details page of the planning item is displayed.
4. Select the **Monetary Benefit Plans** related list.
5. Select name of the required benefit plan and select the **Monetary Benefit Plan Breakdowns** list to view the monetary benefit plans breakdown.
6. Select the required **Entered benefit** field to view the benefit plan form.
7. **Optional:** You can change the previously captured planned benefit from the **Entered benefit** field.
8. Enter the actuals benefits resulted from the work execution in the **Actual benefit** field and select **Save**.

Manage non-monetary benefit plans for your planning items in Portfolio Planning

Create and manage monetary benefit plans to capture the potential benefits while executing your planning items.

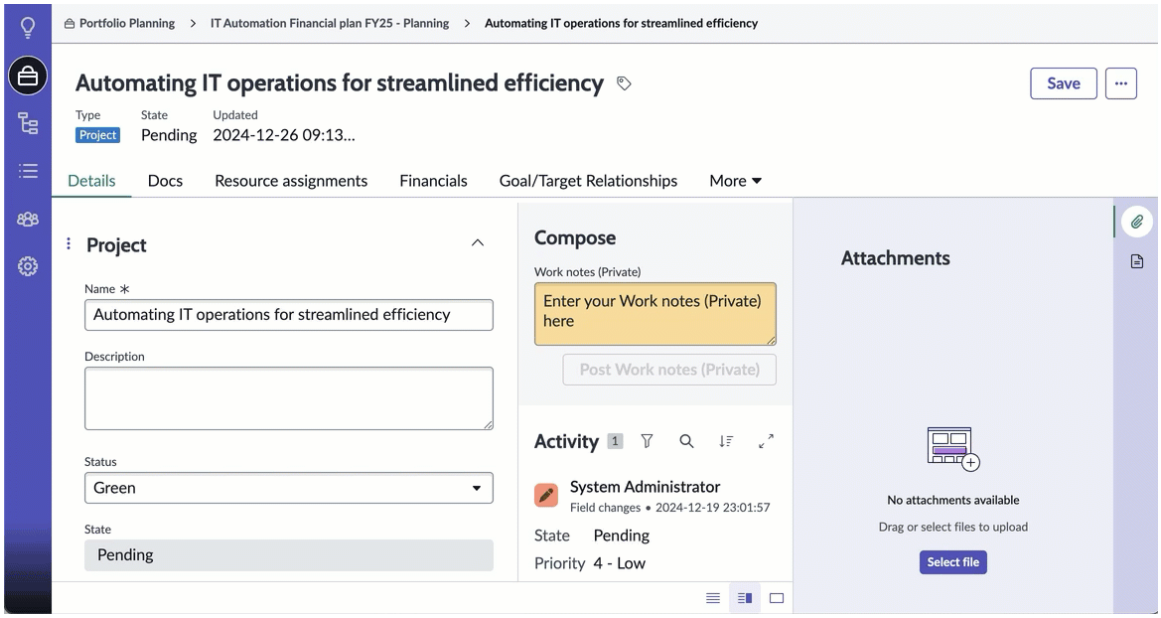
Before you begin

Role required: sn_align_ws.spw_financial_user

Procedure

1. Navigate to **Workspaces** > *Strategic Planning Workspace* and select portfolio plan.
2. Select a planning item from the Planning module.
3. Select the **Non-monetary Benefit Plans** related list.

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4. On the Benefit Plan form, fill the fields.
   For a description of the field names, see Benefit Plan form
5. Select **Save**.

Export financials as Excel or CSV file

Export the costs or baseline comparison data of your planning items to easily share them with your stakeholders.

Before you begin

Role required: sn_align_ws.spw_financial_user

Procedure

1. Navigate to **Workspaces** > *`Portfolio Planning Workspace`* and select a planning item.
2. Select the **Financials** tab.
3. Select the Export option ( ).
4. In the Export side panel, select **Excel** or **CSV** from the File type list and select the **Export** button ( ).

   The financials data is download as an Excel or CSV file with `name_fin_mmddyy` naming convention. The breakdown of the naming convention:

   a. name - fetches the first 10 characters from the name of the planning item.

   b. fin - denotes that the file has financial data.

   c. mmddyy - system date format when you're exporting this data.
   For example, if you're downloading financials data for a planning item named Documentation on January 26, 2024, then the file name reads `documentat_fin_012624`.

> **Note:**
> You can export financials data from Cost view and Baselines comparison view.

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Managing portfolio financials in Portfolio Planning

View the financial breakdown of estimates, approved costs, benefits, and actuals and so on for portfolio financials.

As a portfolio user, you can view the rolled up financial values of top-level demands and projects.

You can view the costs by expense type or cost type. Using the Financials view at portfolio level, you can view different financial fields such as Budget (approved budget for planning items), Forecast, Variance (difference between the approved budget and latest forecast), Actuals, and the Remaining Estimates for Capex, Opex, Total, and Benefits for each planning item. This information can be used to track the financials status of the planning items and take an informed decision on which planning items to consider while working on the next planning cycle and track the to avoid overspending.

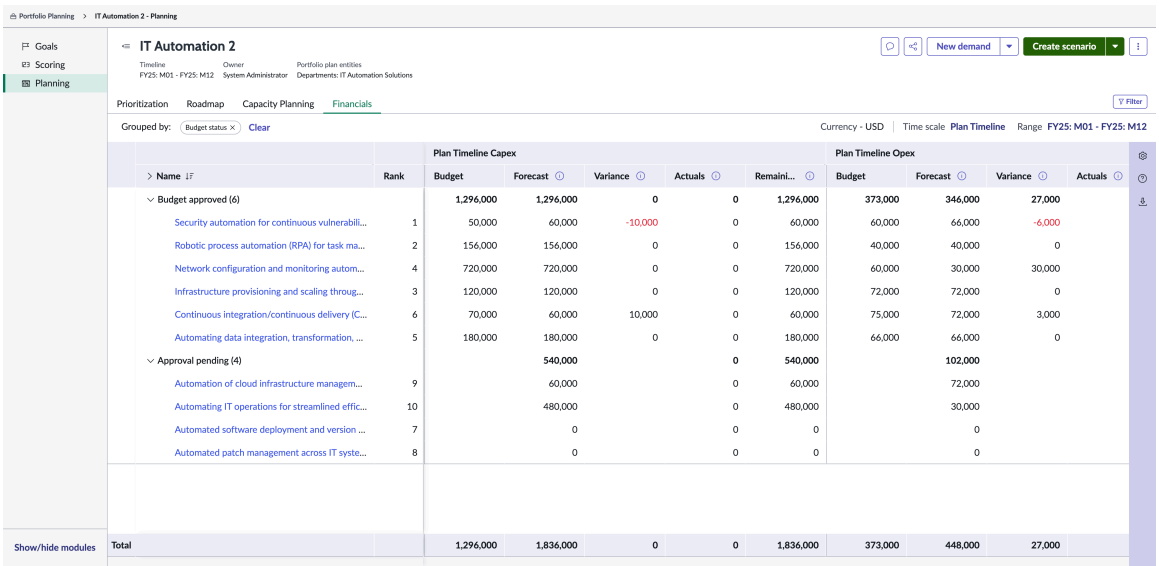
Using the portfolio financials, portfolio managers can:

- Track the financial performance and status of planning items.
- Arrive at an informed decision by analyzing the estimated cost and benefits of a planning item while planning and prioritizing for the next Portfolio cycle.
- View the financials based on the expense type or cost type depending on the budget attribute configuration.
- Avoid overspending on planning items by comparing the approved budget with the latest forecast and actuals.

Important:
New and existing customers need to configure the portfolio financials to view the financials of your planning items at portfolio level. For more information, see Configure portfolio financials in Portfolio Planning.

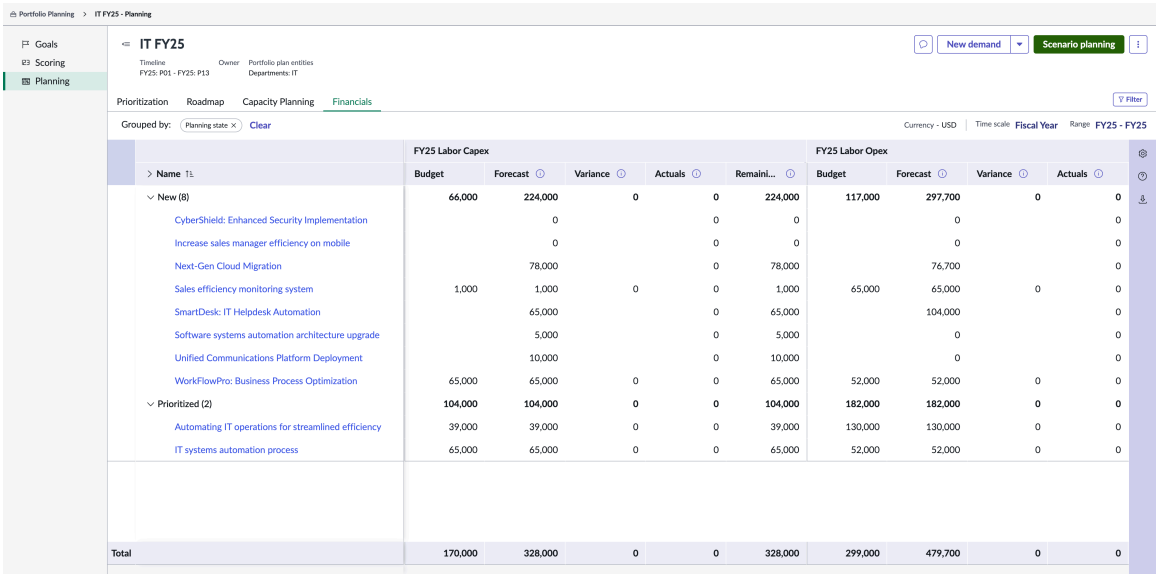
The portfolio financials view supports Demands and Projects with Fiscal Calendar type configuration only.

Portfolio financials grouped by Budget status with expense type as the budget attribute



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Portfolio financials grouped by Planning status with cost type as the budget attribute



Name	FY25 Labor Capex Budget	Forecast	Variance	Actuals	Remaini...	FY25 Labor Opex Budget	Forecast	Variance	Actuals
New (8)	66,000	224,000	0	0	224,000	117,000	297,700	0	0
CyberShield: Enhanced Security Implementation		0		0	0		0		0
Increase sales manager efficiency on mobile		0		0	0		0		0
Next-Gen Cloud Migration		78,000		0	78,000		76,700		0
Sales efficiency monitoring system	1,000	1,000	0	0	1,000	65,000	65,000	0	0
SmartDesk: IT Helpdesk Automation		65,000		0	65,000		104,000		0
Software systems automation architecture upgrade		5,000		0	5,000		0		0
Unified Communications Platform Deployment		10,000		0	10,000		0		0
WorkFlowPro: Business Process Optimization	65,000	65,000	0	0	65,000	52,000	52,000	0	0
Prioritized (2)	104,000	104,000	0	0	104,000	182,000	182,000	0	0
Automating IT operations for streamlined efficiency	39,000	39,000	0	0	39,000	130,000	130,000	0	0
IT systems automation process	65,000	65,000	0	0	65,000	52,000	52,000	0	0
Total	170,000	328,000	0	0	328,000	299,000	479,700	0	0

Note:
Group header row displays the rolled up values for Budget, Forecast, Variance, Actuals, and Remaining estimate of all the planning items in the group.

The default view of portfolio financials is set to display the planning items grouped by their budget approval status. Budget approved grouping lists the planning items which have the budget allocated and approved. Approval pending grouping lists the planning items which do not have any budget or if the requested budget is not approved.

Note:
Portfolio financials view is not yet compatible with Investment Funding. This view may not show the right budget values allocated to planning items from Investment Funding application. This will be add as a future enhancement.

In the left-grid, planning item details such as name, rank, planning state, planning item type, approved start date, total planned cost, total actual costs, total planned benefits and ROI for the full planning item duration.

In the right-grid, financial attributes of the planning items such as, Budget, Forecast, Variance, Actuals, and Remaining Estimates for Capex, Opex, Total, and Benefits portfolio for the portfolio timeline or breakdowns by year, quarter, month, or period.

Tip:
You can select the name of a planning item from the left-grid to directly access the financials record page of that planning item.

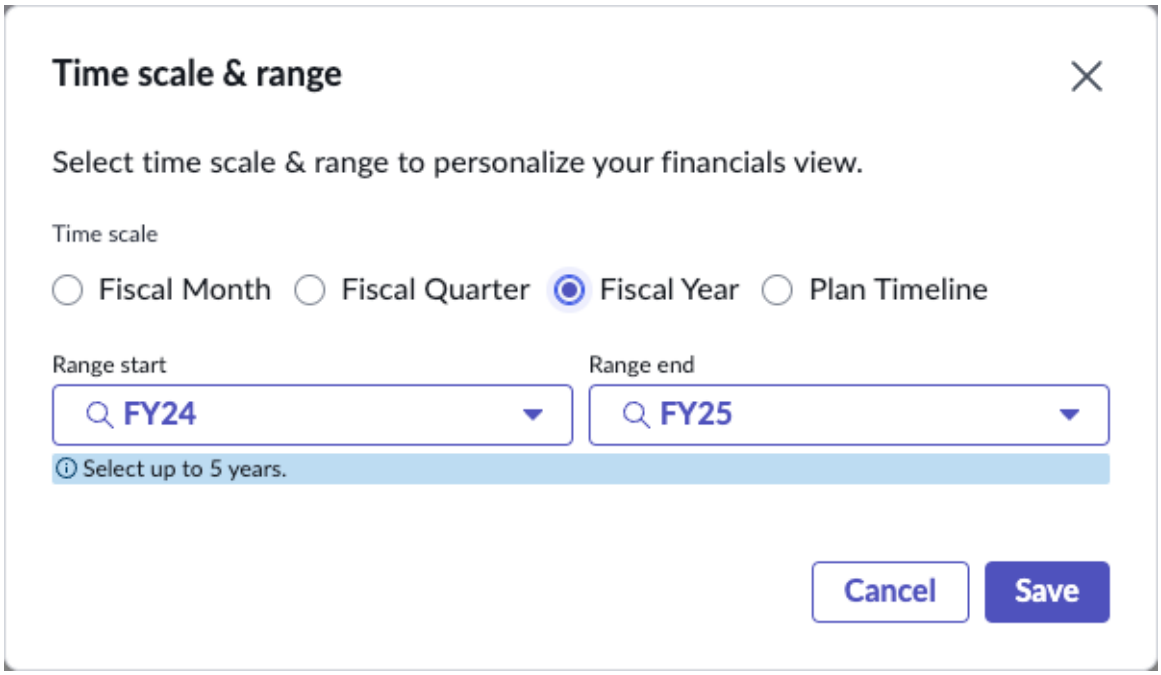
You can export the portfolio financials details to Excel or CSV using the **Export** option ( ).

Customize your financials view

Customize the portfolio financials to view and access the required parameters helping you in better planning your portfolio and planning items.

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- You can get a more detailed and granular view of the financials at monthly, quarterly, and yearly view by defining Timescale and Range. Use time scale to select a fiscal period and filter the range within the time scale to view the financials for any specific months, quarters, or years.



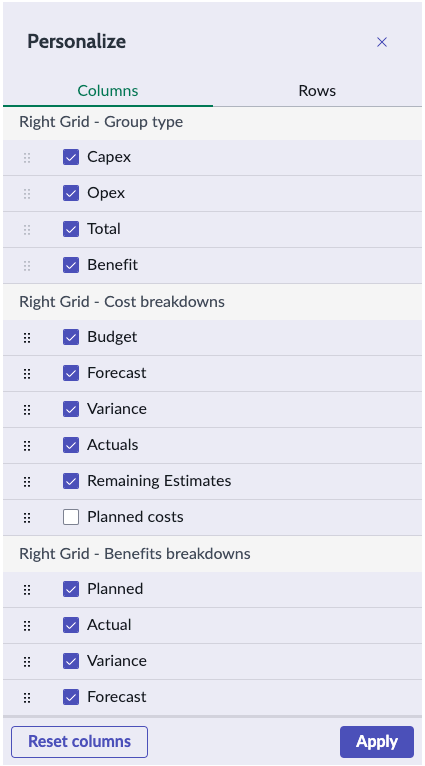
Time scale and range parameters

Time scale	Description and range
Fiscal Month	Portfolio financials view by monthly breakdown. You can select up to 12 months.
Fiscal Quarter	Portfolio financials view by quarterly breakdown. You can select up to 4 quarters.
Fiscal Year	Portfolio financials view by yearly breakdown. You can select up to 5 years period.
Plan Timeline	Portfolio financial breakdown for the entire portfolio timeline.

- Personalize grouping and columns in the grids.

  Configure the columns and groupings in the right-grid using Personalize option ( ) to build a custom view.

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For example, if you want to compare budget and actuals breakdowns, select only these two options and apply your preferences. You can also customize the left-grid by selecting the required columns from the **Left Grid** list from the personalize settings.

- Group the planning items.

  By default, the financials view is grouped by the Budget status column. You can remove Budget status grouping from the Grouped by row and drag-drop the required header to change this view.

Docs for planning items in Portfolio Planning

Store and manage all kinds of documentation for planning items from a centralized location of Portfolio Planning Workspace.

Docs overview

Product and portfolio managers can store information for planning items using the Docs feature.

- Each planning item can have a separate doc to capture the information related to it.

  For example, for an Epic, you create Docs for high level business objectives or technical product requirements.

- Each planning item can have multiple Docs associated to it and each Doc can have multiple pages to help you effectively organize key artifacts.
- Predefined templates such as Project Brief, Product Requirements, Brainstorming Ideas, and Meeting notes are available. Create pages for your Doc using one of these templates or start with a blank page.

Features of Docs

The following are the key features of Docs:

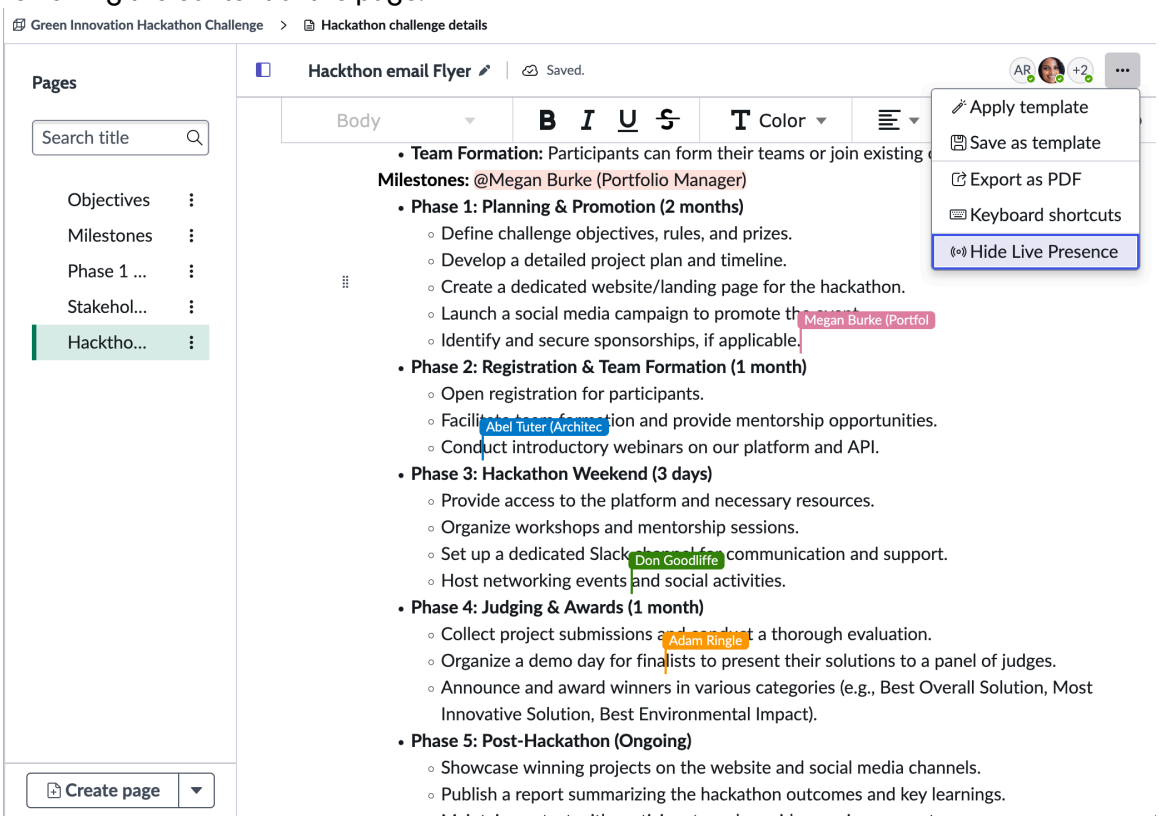
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- Auto-save content.
- See who is viewing or working on a Doc using the feature of live user presence.
- Create documents using pre-defined templates.
- Use rich text paragraph formatting, which includes headings, lists, alignment, and others.
- Move text blocks to change their placement using block-level editing.
- Tag team members inline or insert tables using the **/** command.
- Add reference to other ServiceNow AI Platform tables to connect work across teams.
- Insert images by uploading files or using web URLs.

Note:
The experience of inserting Google Images links might not work.

Real-time collaboration within planning item Docs

With the feature of real-time collaboration, edit a Doc page concurrently with multiple other editors. Colored cursors denote the current location of each editor on the page. You can choose to show or hide these live presence indicators based on your preference while working on or reviewing the content of the page.



Note:
Huge number of users editing the same block of content simultaneously might result in issues with application performance.

Create and manage pages and subpages for planning items

Flexibly organize information for your planning items by creating, duplicating, and deleting pages and subpages in Strategic Planning.

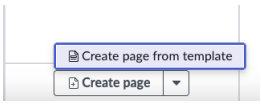
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Before you begin

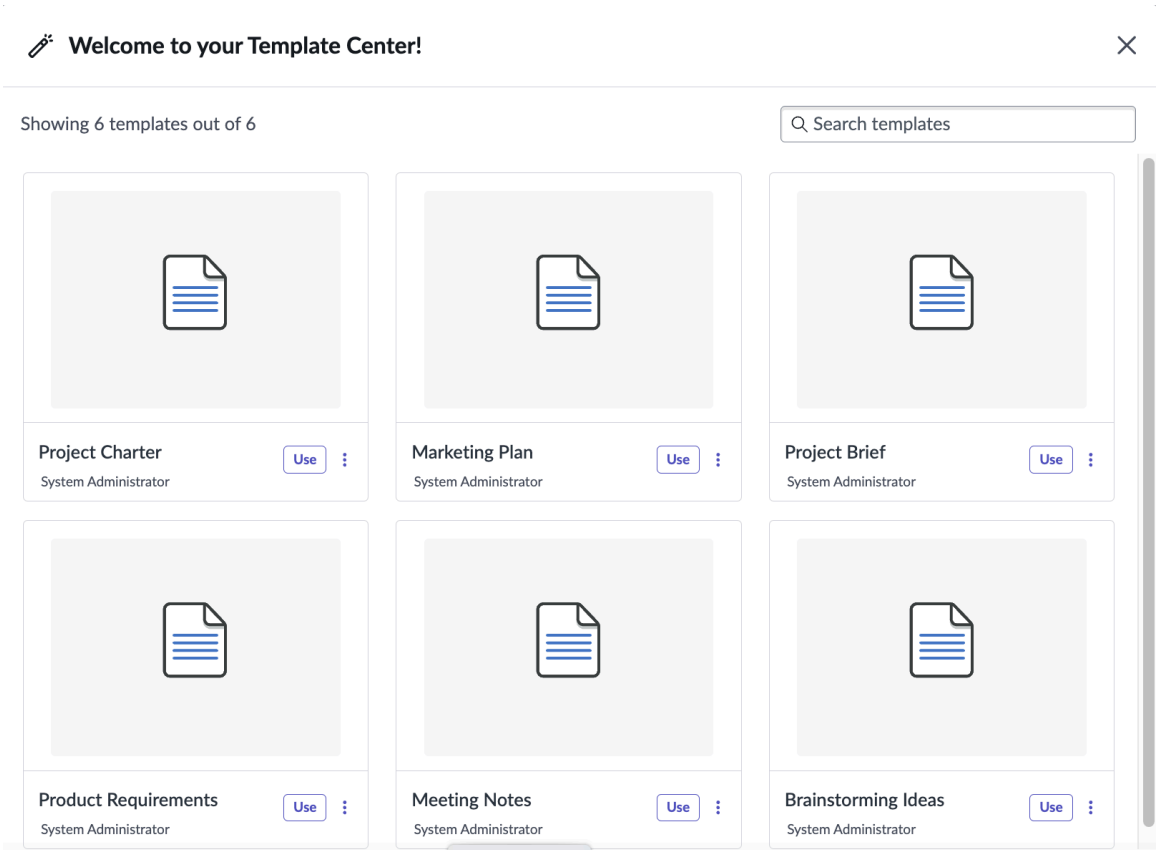
Role required: sn_align_core.apw_user

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select a portfolio plan.
3. From the Prioritization or Roadmap page, select a planning item that you would like to create a doc page for.
   If you have selected a planning item from the Roadmap page, select **Full details** from the **Details** tab of the item's side panel.
4. From the planning item's record page, select **Docs**.
5. To create a page, you can create a blank page or start with a predefined template.
   - For a blank page, select **Create page**.
   - To create from templates:
     a. Select **Create Page from template**.



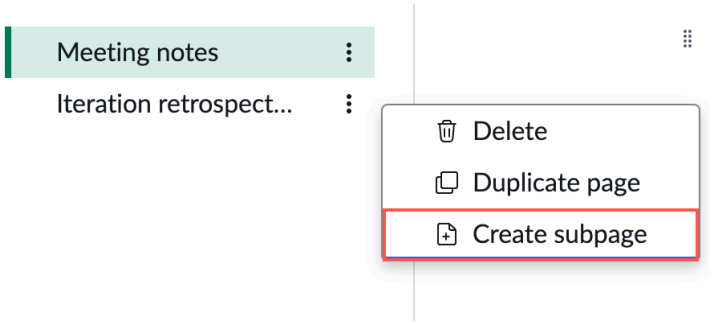
     b. Select a template from the Template Center and select **Create page**.



   The new page is created and added to your Doc with the name **Untitled**, which you can rename.

6. To create a subpage, select the **Page Actions** menu (⋮) and select **Create Subpage**.

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7. To delete a page or a subpage, select the **Page Actions** menu (⋮) and select **Delete**.

Managing portfolio plan views in Portfolio Planning

Portfolio managers can create customized views for their portfolio plans by applying personalization settings such as column selection, grouping, and filtering. Portfolio owners or editors can share these personalized views with stakeholders to enable easier collaboration on the portfolio plans.

Benefits of portfolio plan views

Portfolio managers can create personalized views as needed by applying settings such as column selection, grouping, and filtering.

- Views can be created as private or public.
- Can create up to three private views and up to 10 shared (public) views.
- Portfolio plan views can be shared with stakeholders to enable collaboration on the portfolio plan.
- Switch between shared and private views as needed.
- Each view saves your display preferences across the Prioritization, Roadmap, Capacity, and Financials tabs.

Create a portfolio plan view in Portfolio Planning

Create a customized portfolio plan view based on your requirements, so you can access it when you log in again and share it with stakeholders for collaboration.

Before you begin

Role required: sn_align_core.ap_read_only

About this task

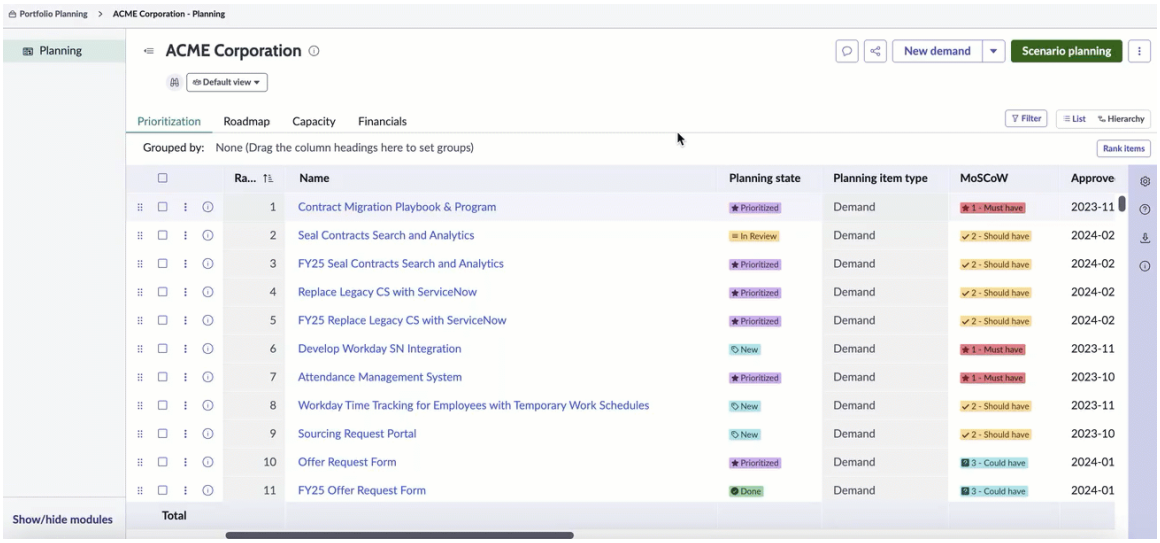
You can create up to three private views and up to 10 shared (public) views per portfolio plan.

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one.
3. Make any changes to the view as needed.
   For example, apply filter with the **Department** attribute and the value as **Finance**.

   The **Save as new view** option appears on the portfolio plan header.

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4. From the portfolio plan header, select **Save as new view**.
5. On the Save as new view window, fill the details.

   a. Enter a name for the view in the **View name** field.

   b. **Optional:** Select the **Shared view** toggle to make this view public.
   Selecting the **Shared view** toggle makes the view visible to all stakeholders with whom this portfolio plan is shared.

   c. Select **Save**.

Result

The shared view for the portfolio plan is created and will be visible to all stakeholders with whom this portfolio plan is shared.

What to do next

- Share the portfolio plan with your stakeholders to start collaborating on the portfolio plan. See Share portfolio plans in Portfolio Planning Workspace.
- Edit a portfolio plan view to make any changes to the existing view. See Edit a portfolio plan view in Portfolio Planning.

Edit a portfolio plan view in Portfolio Planning

Edit a customized portfolio plan view based on your requirements, so you can access it when you log in again and share it with stakeholders for collaboration.

Before you begin

Role required: sn_align_core.ap_read_only

About this task

- Only the owner of a portfolio plan view can edit a shared (public) view.
- You can have up to three private views and up to ten shared (public) views per portfolio plan.

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Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one.
3. From the portfolio plan header, select the view you want to edit or override with your personalization settings from the list of available portfolio plan views.
   The selected view appears.
4. Make changes to the view as needed.
   For example, apply filter with the **Department** attribute and the value as **Finance**.

   After you make any change to the view, the Save view option appears in the portfolio plan header.
5. Select **Save view**.
   The view is updated to reflect the changes made.
6. **Optional:** To edit name of the view, select the Portfolio plan view drop-down from the portfolio plan header and then select Edit view icon ( ) next to the view you want to edit the name for.
   On the Edit view window, fill the details.

   a. Update the name for the view in the **View name** field as required.

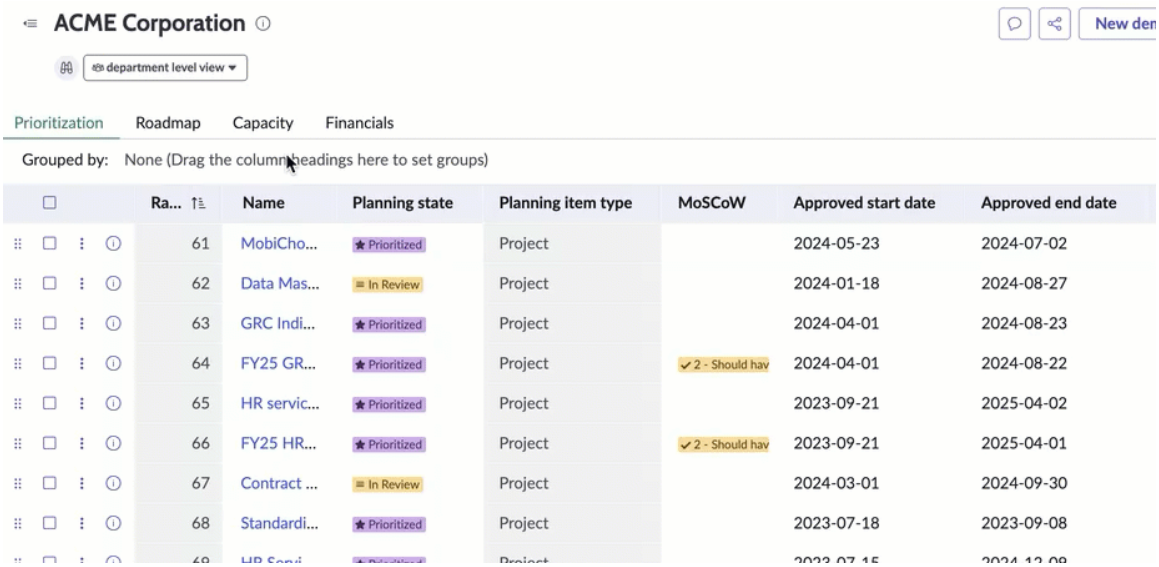
   Note:
   Only the owner of the portfolio plan view can rename the view.

   b. **Optional:** Select the **Shared view** toggle to make this view public or disable the **Shared view** toggle to make the view private.

   Important:
   Changing a shared view to a private view removes access for existing stakeholders.

   c. Select **Save**.

   (Optional) The name of the view is updated.



What to do next

Share the portfolio plan with your stakeholders to start collaborating on the portfolio plan. See Share portfolio plans in Portfolio Planning Workspace.

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Related topics

Create a portfolio plan view in Portfolio Planning

Delete a portfolio plan view in Portfolio Planning

Delete a portfolio plan view in Portfolio Planning

Delete a customized portfolio plan view if it is no longer needed or if the maximum limit of ten shared or three private views has been reached.

Before you begin

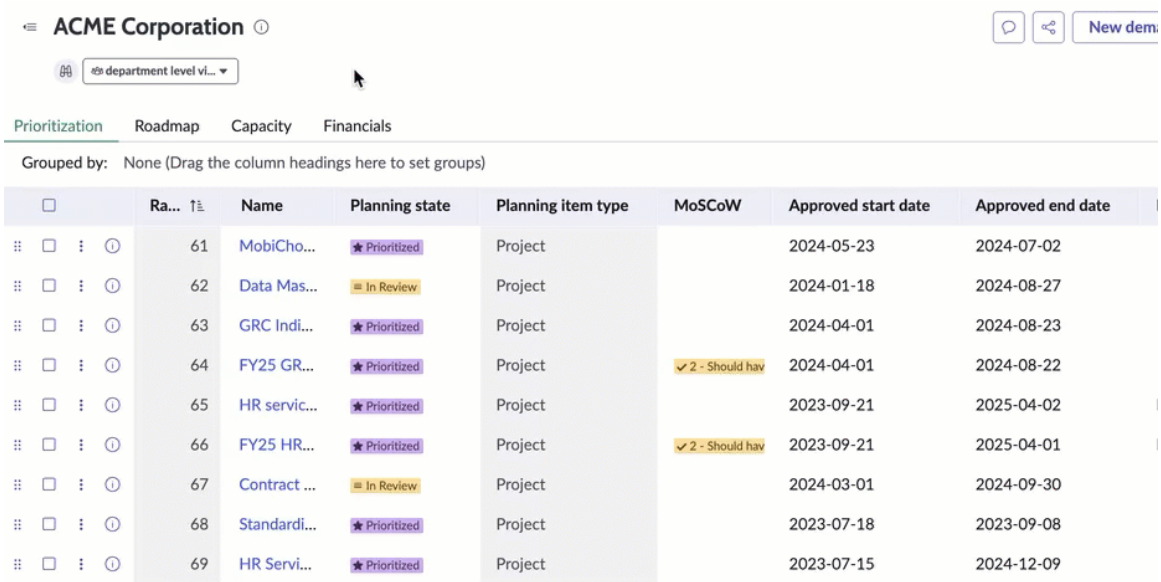
Role required: sn_align_core.ap_read_only

About this task

- Only the owner of the portfolio plan view or an editor of the portfolio plan can delete the view.
- Deleting a portfolio plan deletes the view, including any changes made to the view. However, this action keeps the items (projects, demands, epics) intact in the portfolio plan.
- You can have up to three private views and up to ten shared (public) views per portfolio plan.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one.
3. Select the Portfolio plan view drop-down from the portfolio plan header and then select Delete view icon ( ) next to the view you want to delete.
   The Delete this view window appears.
4. On the Delete this view window, select **Delete**.



Related topics

Create a portfolio plan view in Portfolio Planning

Edit a portfolio plan view in Portfolio Planning

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Using dashboards in Portfolio Planning

Using the Platform Analytics dashboards in Portfolio Planning Workspace, you can monitor performance, track progress, and make informed decisions related to planning and execution.

Roles required for managing dashboards

Required roles to access out-of-the-box dashboards

Access level	Required roles
Read, duplicate, or share the Execution Dashboard	sn_align_core.ap_read_only **Note:** To view data in financial-related and capacity-planning-related widgets, users must have the appropriate roles.
Edit the Execution Dashboard	admin

Required roles to create or edit dashboards (excluding out-of-the-box dashboards)

Access level	Required roles
Create dashboards	sn_align_core.apw_user
Edit dashboards	sn_align_core.apw_user **Note:** You can edit dashboards that you own or those you've been granted permission to edit.

Note:
You can create widgets in dashboards by configuring any available data source table in the ServiceNow AI Platform. However, you must have read access to the source tables to view key data, metrics, or visualizations.

For example, if you create a widget in a dashboard configuring the Cost Plan Breakdown table to display budget data, the budget summary is visible on the dashboard only if you have read access to the Cost Plan Breakdown table. Similarly, when you share this dashboard with a stakeholder, the stakeholder must also have read access to the Cost Plan Breakdown table to view the budget summary.

For more information on the required roles to manage Platform Analytics dashboards, see Platform Analytics dashboard roles.

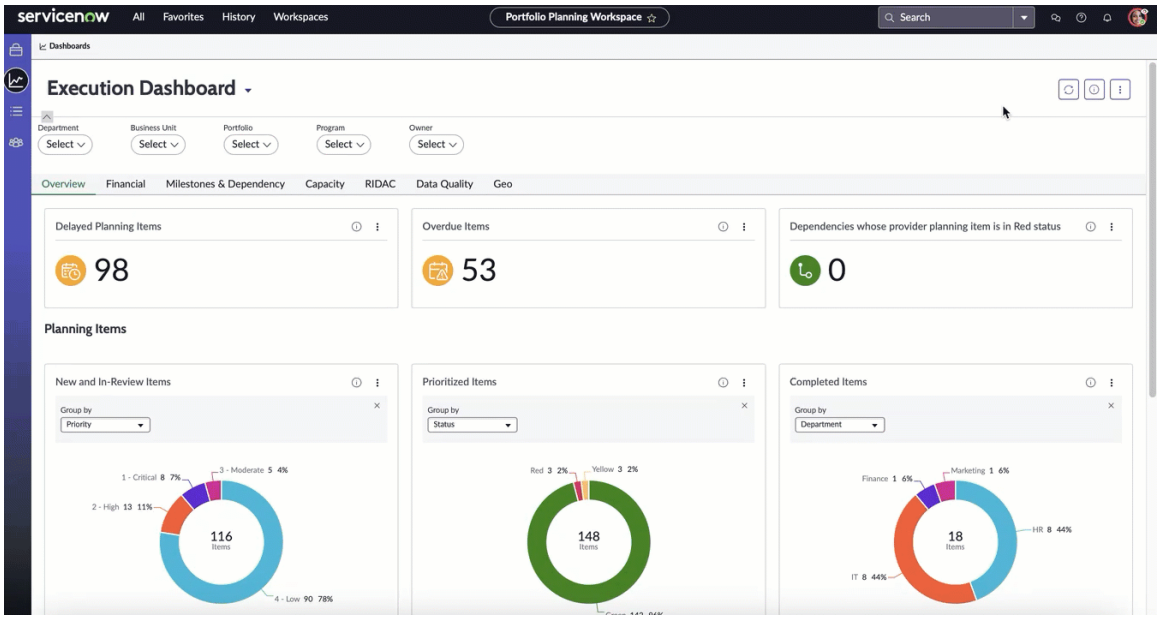
Execution Dashboard in Portfolio Planning

The Execution Dashboard helps portfolio and product managers gain real-time visibility into delivery progress across work items, enabling portfolio leads to detect delays, course-correct early, and keep the strategy on track.

The Execution Dashboard provides various analytics across different tabs, including Overview, Financial, Milestones & Dependency, Capacity, RIDAC, Data Quality, and Geo.

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Overview tab in the Execution Dashboard

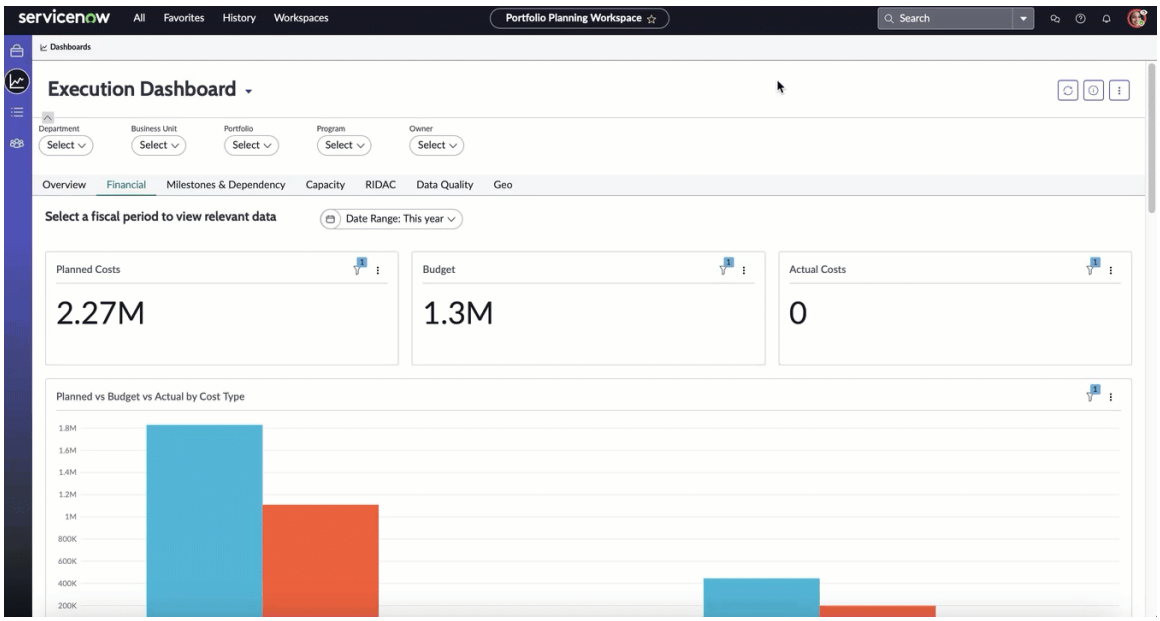


Widget/Visualization	Description
Delayed Planning Items	Planning items that were prioritized but haven't started yet (no recorded actual start date), despite having an approved start date in the past.
Overdue Items	Prioritized planning items that remain incomplete (no recorded actual end date), despite having an approved end date in the past.
Dependencies whose provider planning item is in Red status	Dependencies that have a provider planning item in red status, affecting all dependent planning items.
Planning Items	
New and In-Review Items	Visualization of new and in-review planning items grouped by Priority. You can also group the items using other available options.
Prioritized Items	Visualization of prioritized planning items grouped by Status. You can also group the items using other available options.
Completed Items	Visualization of planning items whose state is Done. You can also group the items using other available options.
Execution Items	
Projects	Visualization of projects count grouped by State. You can also group the items using other available options.

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Widget/Visualization	Description
Demands	Visualization of demands count grouped by State. You can also group the items using other available options.

Financial tab in the Execution Dashboard

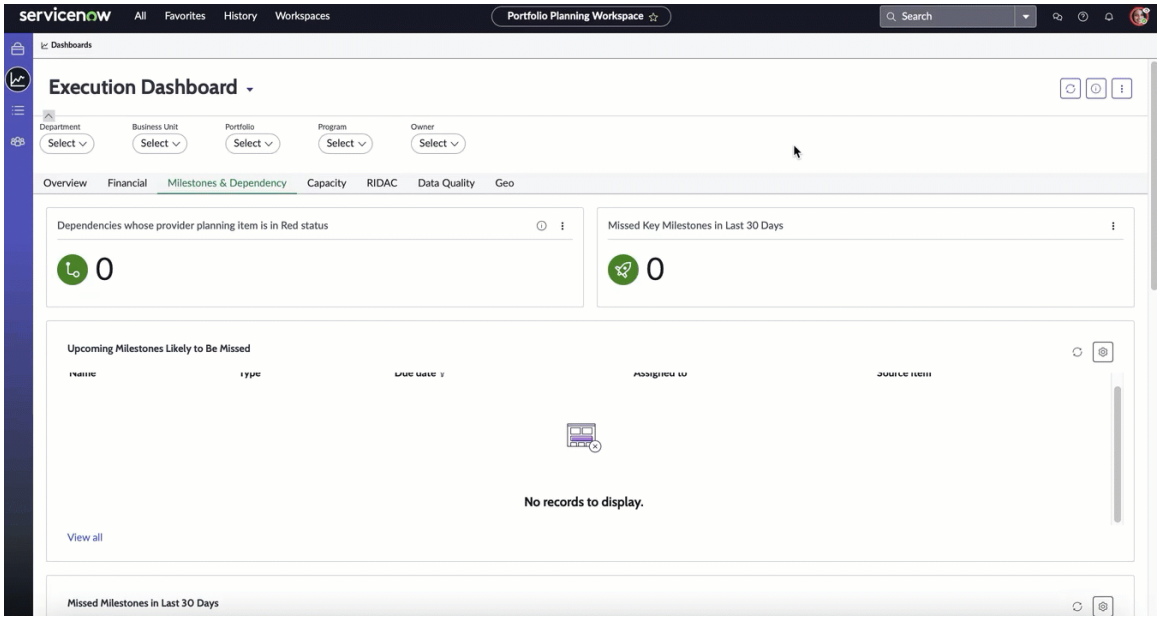


Widget/Visualization	Description
Select a fiscal period to view relevant data	Option to select date range as **This year** or **Last year** to filter and display the data accordingly. Clearing the date range displays the data considering from the start date of the portfolio plan.
Planned Costs	Estimated cost for executing the plan.
Budget	Estimated budget for executing the plan.
Actual Costs	Actual cost incurred during plan execution.
Planned vs Budget vs Actual by Cost Type	Visualization of Planned vs Budget vs Actuals by Cost Type.
Planned vs Budget vs Actual	Visualization of cost by Planned vs Budget vs Actual.
Budget by Investment Type	Visualization of budget by Investment type.
Benefits	
Planned Monetary Benefits	Monetary benefits that have been planned.
Actual Monetary Benefits.	Monetary benefits that have been achieved.
Pending Monetary Benefits.	Monetary benefits that are in pending state.
Benefits by Category	Benefits by category such as Revenue, Cost savings, and Customer satisfaction score.

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Widget/Visualization	Description
Monetary Benefits	Visualization of monetary benefits with respect to planned and actual benefits.

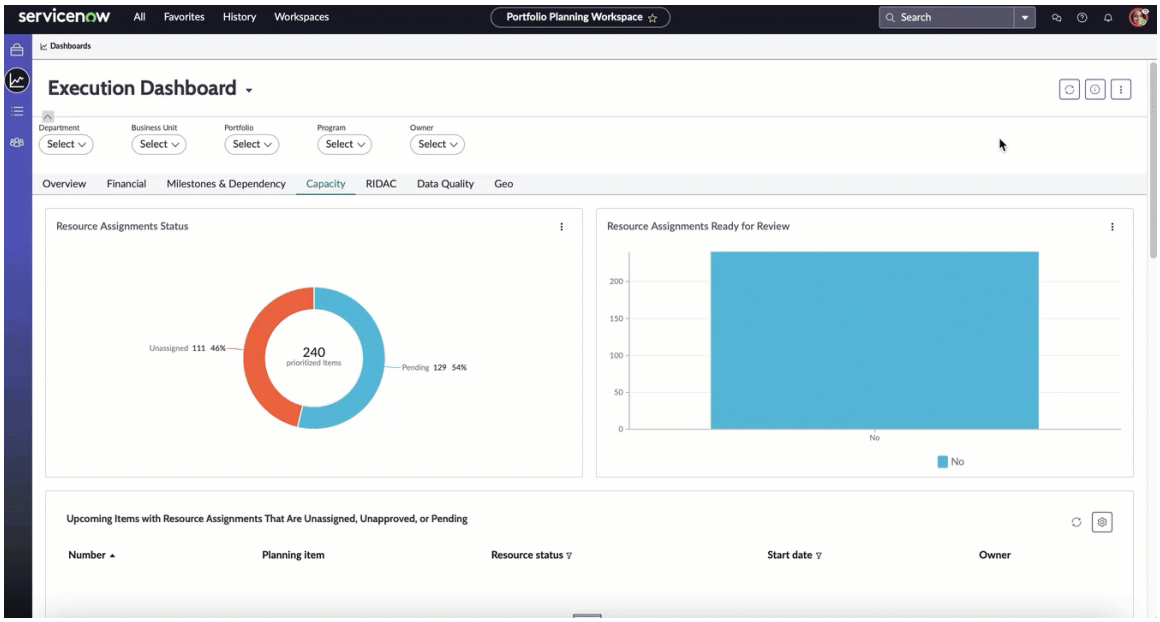
Milestones & Dependency tab in the Execution Dashboard



Widget/Visualization	Description
Dependencies whose provider planning item is in Red status	Count of dependencies that have a provider planning item in red status, affecting all dependent planning items.
Missed Key Milestones in Last 30 Days	Count of planning items whose key milestones were missed within the last 30 days.
Upcoming Milestones Likely to Be Missed	List of planning items whose key milestones about to be missed soon with details including Name, Type, Due date, Assigned to, Source item.
Missed Milestones in Last 30 Days	List of planning items whose key milestones were missed within the last 30 days with details including details, Name, Type, Due date, Assigned to, and Source item.
Achieved Milestones in Last 30 Days	List of planning items whose key milestones were achieved within the last 30 days with details including details, Name, Type, Due date, Assigned to, and Source item.
Milestones Analyzer	Visualization of key milestones grouped by state and stacked by Type. You can also group and stack the items using other available options.

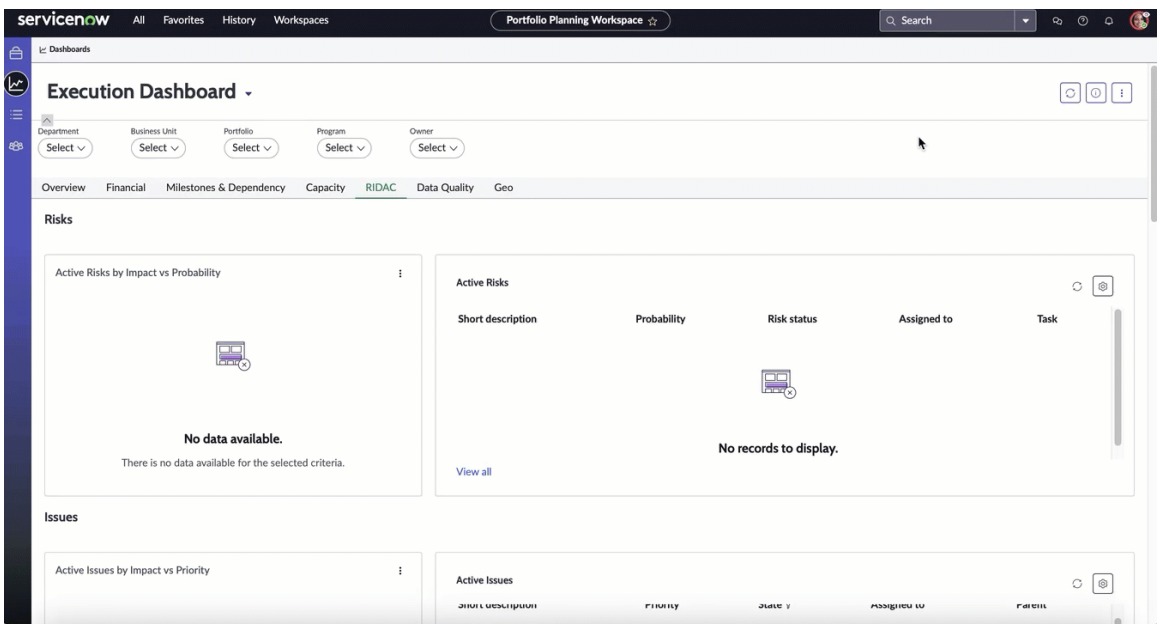
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Capacity tab in the Execution Dashboard



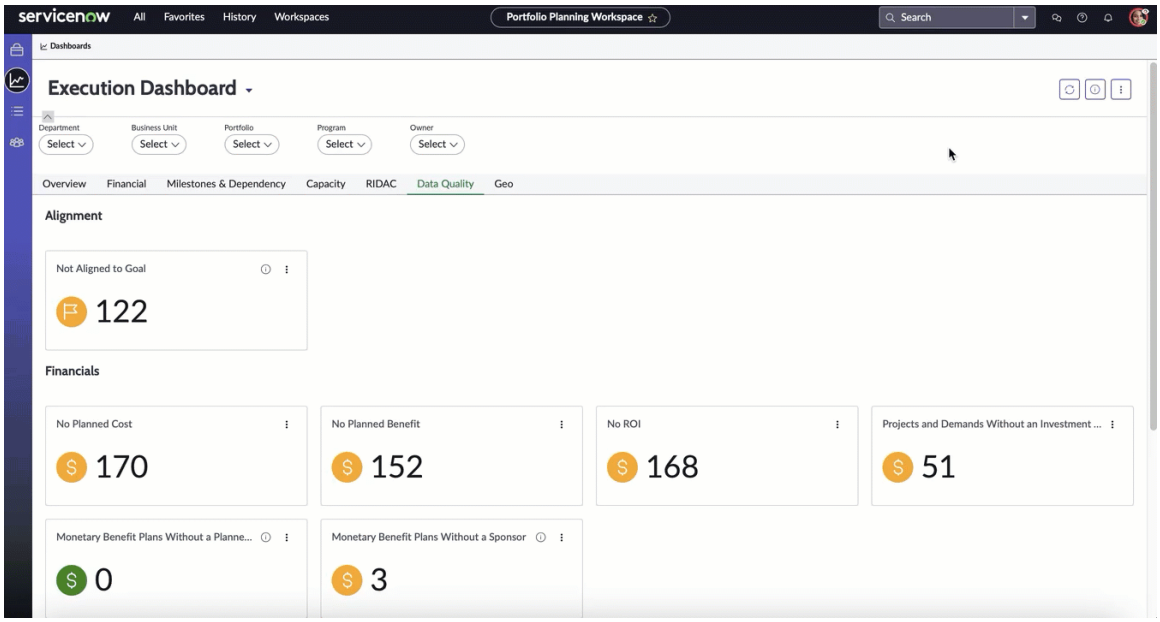
Widget/Visualization	Description
Resource Assignments Status	Visualization of resource assignments status.
Resource Assignments Ready for Review	Visualization of resource assignments count that is ready for review.
Upcoming Items with Resource Assignments That Are Unassigned, Unapproved, or Pending	List of upcoming planning items whose resource assignments status is Unassigned, Unapproved, or Pending.
Resource Assignments by Group, Role & Skill	Visualization of resource assignments count by their group, role, and skill.

RIDAC tab in the Execution Dashboard



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Data Quality tab in the Execution Dashboard



Widget/Visualization	Description
Alignment	
Not Aligned to Goal	Count of work items that aren't associated with any goal.
Financials	
No Planned Cost	Count of work items for which cost estimation is done yet for execution.
No Planned Benefit	Count of work items for which benefit estimation is done yet.
No ROI	Count of work items for which ROI isn't estimated yet.
Projects and Demands Without an Investment Type	Count of projects and demands for which Investment type isn't defined yet.
Monetary Benefit Plans Without a Planned Benefit	Count of monetary benefit plans for which benefit isn't defined yet.
Monetary Benefit Plans Without a Sponsor	Count of monetary benefit plans for which a sponsor hasn't been assigned yet.
Planning Items with Other Attributes	
No Resource Assignments	Count of planning items without resource assignments.
Unscheduled Items	Count of planning items not scheduled yet.
No Portfolio	Count of planning items with no portfolio defined.
No Program	Count of planning items with no program defined.

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Widget/Visualization	Description
No Department	Count of planning items with no department populated.
No Business Unit	Count of planning items with no business unit populated.
No Owner	Count of planning items with no owner assigned.

Geo tab in the Execution Dashboard

Widget/Visualization	Description
Planned cost by location	Estimated cost by location for executing the plan.

View a dashboard in Portfolio Planning

View key data and metrics on a dashboard to monitor performance, track progress, and make informed decisions related to planning and execution.

Before you begin

Role required: sn_align_core.ap_read_only

About this task

Dashboards consolidate data from multiple sources into a single, easily digestible format. Each widget within a dashboard displays key data and metrics and may include visualizations.

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Dashboards**.
   By default, the Execution Dashboard appears on the Dashboards page.
2. **Optional:** From the Change dashboard drop-down, select the dashboard you want to view.
   The selected dashboard appears.
3. **Optional:** Select a required tab that you want to view the key data and metrics for.
   Each widget within a dashboard displays key data and metrics and may include visualizations.
4. **Optional:** Select a widget to see more details of the data in list view.
   If you have edit access, you can update the details of an individual record directly from the list view when necessary.

Related topics

Create a dashboard in Portfolio Planning

Duplicate a dashboard in Portfolio Planning

Share a dashboard in Portfolio Planning

Add a Platform Analytics dashboard to Portfolio Planning Workspace

Create a dashboard in Portfolio Planning

In the Platform Analytics experience, you can create sharable dashboards with data visualizations, filters, and other elements. You can use the available elements in the inline editor to create different types of widgets as needed.

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Before you begin
Role required: sn_align_core.apw_user

About this task
Dashboards consolidate data from multiple sources into a single, easily digestible format. Each widget within a dashboard displays key data and metrics and may include visualizations.

Procedure
1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Dashboards**.
   By default, the Execution Dashboard appears on the Dashboards page.
2. From the dashboard header, select the More actions icon (⋮) and then select **Create new**.
3. On the New dashboard window, fill the details.
   a. Enter a name for the dashboard in the **Name** field.
   b. **Optional:** Enter a brief description for the dashboard in the **Description** field.
   c. Select **Create new dashboard**.

What to do next
Edit a dashboard as needed by adding sections, filters, images, lists, process mining maps, and rich text. For more information, see Edit a dashboard in Portfolio Planning.

Related topics
View a dashboard in Portfolio Planning

Duplicate a dashboard in Portfolio Planning

Share a dashboard in Portfolio Planning

Add a Platform Analytics dashboard to Portfolio Planning Workspace

Edit a dashboard in Portfolio Planning

Customize or edit a dashboard as needed by adding sections, filters, images, lists, process mining maps, and rich text. If the dashboard has been shared, any changes you make are applied globally.

Before you begin
Role required: sn_align_core.apw_user

About this task

Note:

- You can edit dashboards that you own or those you've been granted permission to edit.
- Only an administrator can edit the out-of-the-box dashboard that is Execution Dashboard. However, you can duplicate an out-of-the-box dashboard and customize it as needed.

You can use the following elements to create or edit your dashboard.

Dashboard elements in Strategic Planning

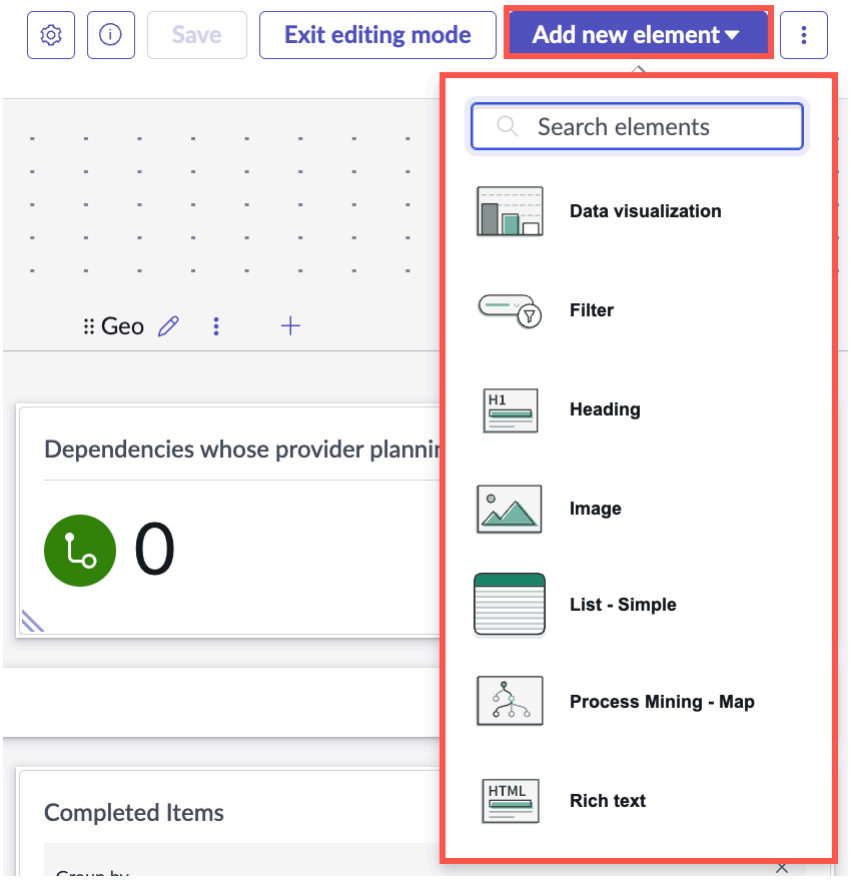
Element	Description
Data visualization	Enables you to present a visual representation of current instance data or temporary data that you've imported. Data visualizations include visualizations that you create in the dashboard

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Dashboard elements in Strategic Planning (continued)

Element	Description
	designer and data visualizations from the library.
Filter	Enables you to filter the visualizations on a dashboard based on specified criteria. You can put filters either on the individual tabs or above the tabs so that the filter applies to elements every tab. Filters include both data filters and domain filters. You can create filters in the dashboard designer or select them from the library.
Heading	Provides a place for text at the top of a dashboard or section of a dashboard. Formatting for headings is limited to six heading levels.
Image	Holds static or animated images on the dashboard.
List - Simple	Shows table data that you can customize for the dashboard audience.
Process Mining - Map	Maps the different states that are part of your process and the transitions between those states. See which states the objects of the process are in and the speed with which they change state. Requires an existing Process Mining project.
Rich text	Holds text that you can format either as text or as html, including font selection, text size, highlighting, and hyperlinks. To edit HTML markup, open the HTML editor from the Configuration panel and select the Code tags < > icon.

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Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Dashboards**.
   By default, the Execution Dashboard appears on the Dashboards page.
2. From the Change dashboard drop-down, select the dashboard you want to edit.
   The selected dashboard appears.
3. From the dashboard header, select **Edit**.
4. Drag to move the widget or resize it as required.
5. From the dashboard header, select **Save**.
6. From the dashboard header, select **Exit editing mode**.

Result

The dashboard is updated with the latest changes.

What to do next

- Add more elements and customize your dashboard as required.
- For detailed instructions on editing a dashboard using the Platform Analytics experience in Portfolio Planning, see Edit Platform Analytics dashboards.

Related topics

View a dashboard in Portfolio Planning

Create a dashboard in Portfolio Planning

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Duplicate a dashboard in Portfolio Planning

Share a dashboard in Portfolio Planning

Add a Platform Analytics dashboard to Portfolio Planning Workspace

Duplicate a dashboard in Portfolio Planning

If the dashboard you want to create is similar to an existing one, duplicating the existing dashboard saves your time. After duplicating the dashboard, you can customize the tabs and widgets as required.

Before you begin

- Users or groups that you want to share the dashboard with must have the sn_align_core.ap_read_only or sn_align_core.apw_user role to get the read or edit access to the portfolio plan respectively.
- When you duplicate a dashboard, you copy all settings and details of the original. Content that exists locally on the original dashboard is duplicated onto the new dashboard. If the original dashboard contains references to content in a library, such as a shared visualization, the references are duplicated. The role requirements for editing an element in a library apply to the latter.

Role required: sn_align_core.ap_read_only

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Dashboards**.
   By default, the Execution Dashboard appears on the Dashboards page.
2. From the Change dashboard drop-down, select the dashboard that you want to duplicate.
3. From the dashboard header, select the More actions icon (⋮) and then select **Duplicate**.
4. On the Duplicating dashboard window, fill the details.

   a. Enter a name for the portfolio plan in the **New name** field.
   By default, the name is *ABC (Copy)* where ABC is the name of the dashboard you duplicated from.

   b. **Optional:** Enter a brief description of the goal in the **Description** field.

   c. Select **Duplicate**.

   Duplicating the dashboard may take some time. Select **Continue in background** to keep using the application in the meantime.

Result

The dashboard is copied with the new name. The appearance of the dashboard is identical to the original.

What to do next

Edit a dashboard as needed by adding sections, filters, images, lists, process mining maps, and rich text. For more information, see Edit a dashboard in Portfolio Planning.

Related topics

View a dashboard in Portfolio Planning

Create a dashboard in Portfolio Planning

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Share a dashboard in Portfolio Planning

Add a Platform Analytics dashboard to Portfolio Planning Workspace

Share a dashboard in Portfolio Planning

Share a dashboard with stakeholders, planning managers, portfolio managers, or product managers to provide visibility into work progress and foster collaboration. You can grant either view-only rights or both view and edit rights to a shared dashboard.

Before you begin

Role required: sn_align_core.ap_read_only

About this task

Users or groups you want to share the dashboard with must have the appropriate roles assigned to access shared dashboards:

Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Dashboards**.
   By default, the Execution Dashboard appears on the Dashboards page.
2. From the Change dashboard drop-down, select the dashboard you want to share.
   The selected dashboard appears.
3. From the dashboard header, select the More actions icon (⋮) and then select **Share**.
4. On the Share Dashboard window, fill the details.

   a. Enter a user name or group name in the **Grant access to** field to provide access to individual users or user groups, respectively.
   You can also select a role to grant dashboard access to all users assigned that role.

   b. **Optional:** Select **Allow recipients to add, edit, or delete sharing permissions associated with this dashboard** to enable users to grant access to new users and modify or remove existing permissions.

   c. Select **Add as viewer** or **Add as editor** as required.

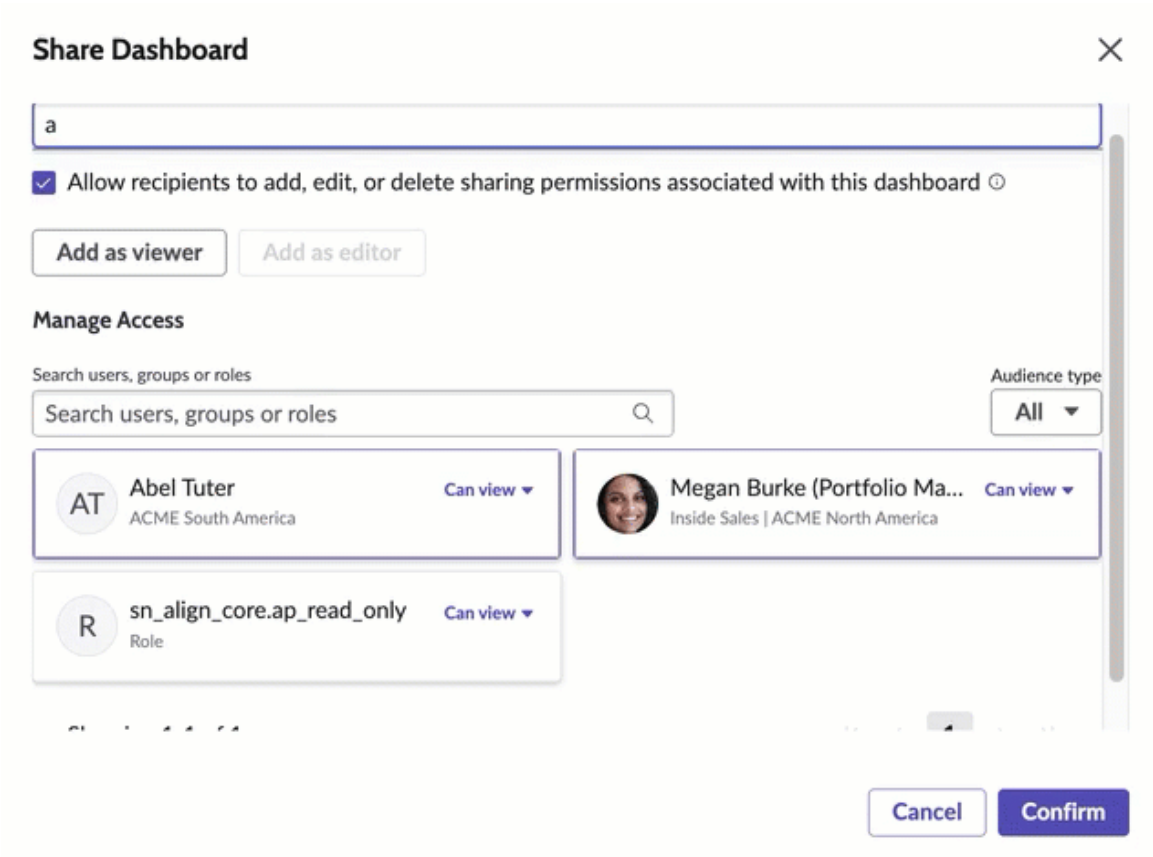
   Note:
   You can select **Add as editor** only if you have the sn_align_core.apw_user role assigned to you.

   The selected users, groups, and roles appear under **Manage Access**.

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You can also manage sharing permissions by selecting a user, group, or role and enabling the **Can share** option.

d. Select **Confirm**.



Result

The roles, groups, and users you have shared the dashboard with appear when you reopen the dialog, along with the rights you have given them.

What to do next

You can change the rights of whom you have shared the dashboard with in the Share Dashboard dialog, under the Can view/Can share list for each user, group, or role.

Related topics

- View a dashboard in Portfolio Planning
- Create a dashboard in Portfolio Planning
- Duplicate a dashboard in Portfolio Planning
- Add a Platform Analytics dashboard to Portfolio Planning Workspace

Add a Platform Analytics dashboard to Portfolio Planning Workspace

If you have existing dashboards created using Platform Analytics, you can add them to the Portfolio Planning Workspace to access them directly from a single location.

Before you begin

Role required: sn_align_core.apw_user

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About this task
You can add any Platform Analytics dashboard to Portfolio Planning Workspace.

Procedure
1. Navigate to **All** > **Platform Analytics** > **Analytics Center**.
   The Dashboards section appears on the page.
2. Select a bookmarked or certified dashboard from the **Bookmarked** or **Certified** tabs, respectively.
   If the dashboard you want to add is not bookmarked or certified, select **View all** from the Dashboards section, and then select the dashboard from the Dashboards page.

   The selected dashboard appears.
3. From the dashboard header, select **Edit**.
4. From the dashboard header, select the View dashboard details icon ( ).
   a. In the Details side panel, fill in the **Dashboard visibility** field with Portfolio Planning Workspace.
5. From the dashboard header, select **Save**.
6. From the dashboard header, select **Exit editing mode**.

Result
The dashboard appears in the Portfolio Planning Workspace.

Related topics
View a dashboard in Portfolio Planning

Create a dashboard in Portfolio Planning

Duplicate a dashboard in Portfolio Planning

Share a dashboard in Portfolio Planning

Export the portfolio plan status or roadmap to Microsoft PowerPoint from Portfolio Planning Workspace

Export the status of work items, roadmap, and key metrics of your portfolio plan and free-form roadmap into a Microsoft PowerPoint file so that you can keep your business stakeholders updated on the progress. Save time by avoiding copying data into reports and drive shared outcomes by enabling collaboration even with stakeholders who cannot access your ServiceNow instance.

Before you begin
Install Export to PowerPoint for Strategic Portfolio Management.

> **Important:**
> Export to PowerPoint is currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. Please check for availability updates in future releases.

Role required: admin

About this task
The following two PowerPoint templates are provided by default to generate a status report for your portfolio plan:

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- Portfolio plan status: Contains individual detailed slides for the top five items prioritized by rank.
- Roadmap Template - default: Contains slides for Roadmap for this portfolio. You can export roadmap data for a maximum period of a year at a time.

You can customize the type of the data to be shown in the generated report by updating a predefined template or by creating your own branded template. See Create a Microsoft PowerPoint template.

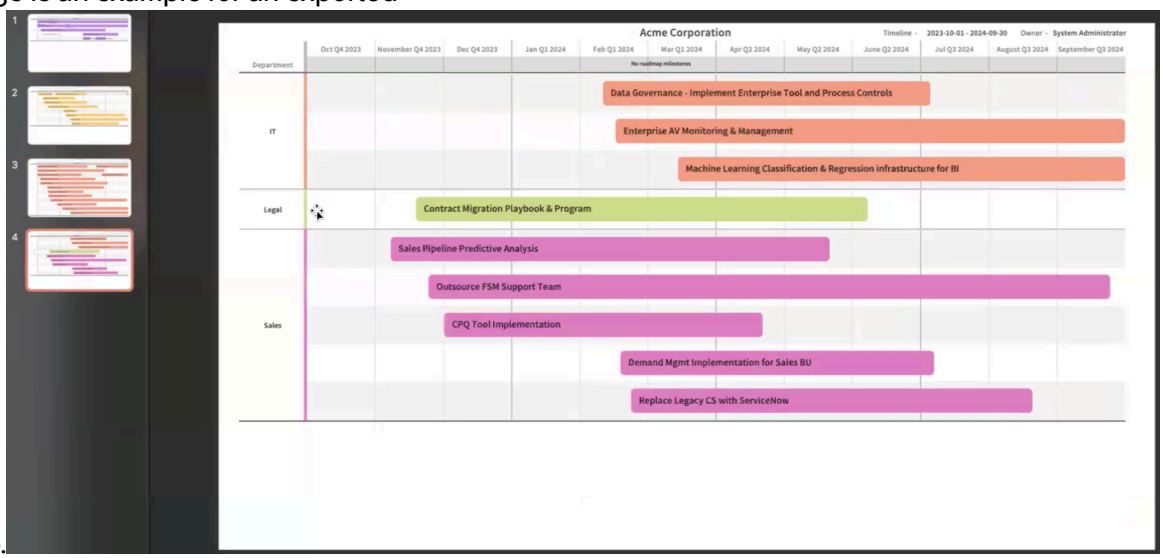
Procedure

1. Navigate to **Workspaces** > **Portfolio Planning Workspace** > **Portfolio Planning**.
2. Export the status of goals, work items, roadmap, and key metrics of your portfolio plan and free-form roadmap into a Microsoft PowerPoint file.

Result

A PowerPoint file is generated with the relevant data.

This image is an example for an exported roadmap.



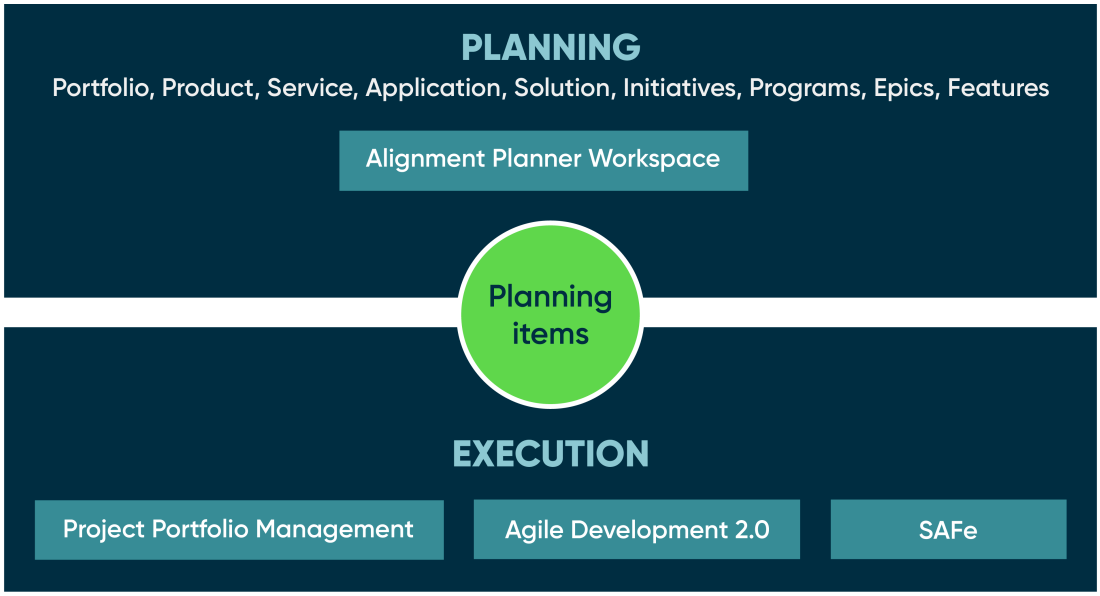
Executing Portfolio Planning work in PPM

Facilitate execution of the work planned in Portfolio Planning in ServiceNow Project Portfolio Management application.

Import, export, and manage your planning items between Portfolio Planning and PPM.

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Integrating Portfolio Planning and PPM



Key benefits of Portfolio Planning with PPM

- View available PPM planning items in Portfolio Planning.
- Import planning items from PPM to Portfolio Planning.
- Export planning items from Portfolio Planning to PPM.
- Synchronize updates for linked planning items of Portfolio Planning with PPM.
- Track the progress of the linked planning items in Portfolio Planning.

To get started on integrating Portfolio Planning with PPM, see Configuring Portfolio Planning with PPM.

Frequently asked questions about execution integration

Can I use PPM Standard for project execution without Agile 2.0 or SAFe?

Yes. If your teams follow waterfall or traditional Project Management methodology, use PPM Standard (Project Portfolio Management) as your execution system. Planning items created in Portfolio Planning can be exported to PPM as projects. Changes in PPM (project status, costs, resources) sync back to Portfolio Planning automatically.

Use case: Infrastructure team plans in Portfolio Planning, executes data-center migration project in PPM Standard with Gantt charts, task dependencies, and resource management.

When do I use PPM for execution?

Base your decision on team methodology and org scale: PPM Standard: For waterfall projects, traditional PM teams, infrastructure work, conformance-driven initiatives.

Should I install PPM Standard to use Portfolio Planning?

No. Install PPM Standard if your teams actually uses it. Portfolio Planning works standalone for planning and prioritization. Add the PPM plug-in when teams are ready to execute work in this system.

What data syncs between Portfolio Planning and PPM?

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Bi-directional sync includes:

- From Portfolio Planning → execution: Planning item name, description, owner, goals, budget, priority, timeline.
- From execution → Portfolio Planning: Status, progress %, actual costs, resource assignments, risks/issues.
- Real-time updates: Changes in either system appear in both within seconds.

Common execution scenarios

Scenario: PPM only organization (waterfall projects)

1. Portfolio managers create planning items in Portfolio Planning.
2. After prioritization, export planning items to PPM Standard as projects.
3. Project managers build WBS, create tasks, assign resources, manage timeline in PPM.
4. Portfolio Planning shows project status, costs, risks automatically

Troubleshoot execution integration

- Issue: Planning item not appearing in PPM
  - Verify the execution system plugin is installed and activated.
  - Check that planning item state is Prioritized (items in the Backlog state don't export).
  - Confirm user has required role in execution system (project_manager, scrum_admin, safe_admin).
- Issue: Changes in PPM not syncing back to Portfolio Planning
  - Verify bi-directional sync is enabled in integration configuration.
  - Check that the planning item and PPM project/epic are properly linked (primary planning item field is populated).
  - Review transformation maps for any table, field, or choice mapping issues.

Import records to Portfolio Planning

Import records from Project Portfolio Management, after the relevant table maps, fields maps, and choice maps are configured.

Before you begin

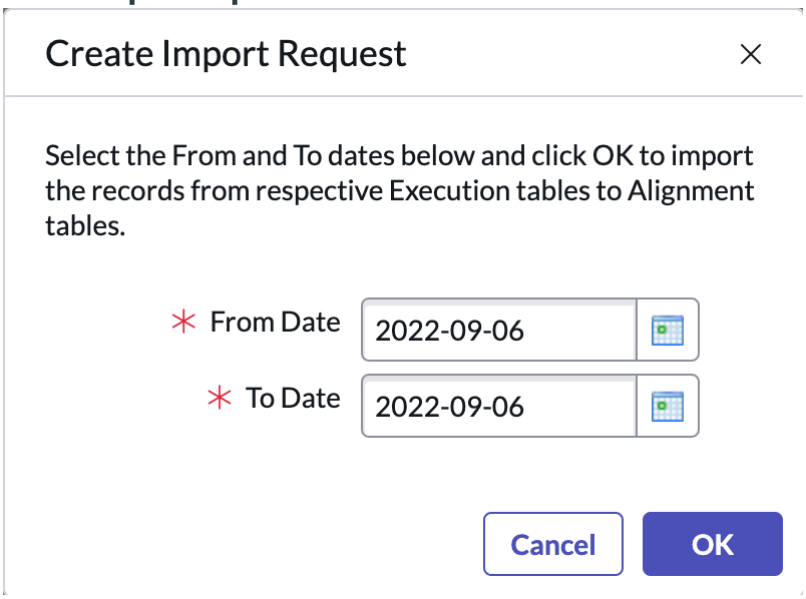
Role required: sn_align_core.apw_admin

Procedure

1. Navigate to **All** > **Portfolio Planning** > **Integrations**.
2. Select **ServiceNow Internal** Alignment Integration record.
3. Click **Import**.
4. On the Create Import Request form, fill in the date range for importing the records.

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Create Import Request



5. Select **OK**.

> **Note:**
> Records that have been created within the specified dates will be imported.

View error logs

View error logs to understand the cause of any issues that might have occurred during the integration process.

Before you begin
Role required: sn_align_core.apw_admin

Procedure

1. Navigate to **All** > **Portfolio Planning** > **Integrations**.
2. To view the error logs, select the **Integrations Errors** tab.

Portfolio Planning reference

Reference information to provide additional details about Portfolio Planning such as user roles, tables, and domain separation information.

Components installed with Portfolio Planning

Several types of components are installed with activation of the Portfolio Planning application, including tables and user roles.

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Roles installed

Role title [name]	Description	Contains roles
Portfolio Planning admin [sn_align_core.apw_admin]	Can access all the modules in the Portfolio Planning application	• it_portfolio_manager • sn_align_core.apw_user • view_changer
Portfolio Planning user [sn_align_core.apw_user]	Can create, update, and delete portfolio plans, free-form roadmaps, and planning items. This role can be given to users such as portfolio or product managers, business unit leads, and other planning personas.	• sn_align_cmn_int.user • sn_milestones.milestone_editor
sn_align_core.ap_read_only	• Can view portfolio plans and free-form roadmaps that are shared with them. • Can add notes, comments, or attachments to portfolio plans and roadmaps that are shared with them. • Can create, edit, and delete portfolio plan views and free-form roadmap views. **Note:** Only the owner can edit or delete a portfolio plan view or a free-form roadmap view.	sn_milestones.milestone_viewer
Milestones editor [sn_milestones.milestone_editor]	Can create, update, and delete milestones on the roadmap.	sn_milestones.milestone_viewer
Milestones viewer [sn_milestones.milestone_viewer]	Can view milestones on the roadmap.	None

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Role title [name]	Description	Contains roles
Business stakeholder [business_stakeholder]	• Can create and update portfolio plans and free-form roadmaps. • Can add notes, comments, or attachments to portfolio plans and roadmaps that are shared with them. • Can personalize the roadmaps. • Can view generated resource capacity for planning items in the Capacity Planning screen. • Can view goals and related records using the platform view. **Note:** Users with this role do not have access to create or edit any roadmap items.	• sn_align_core.ap_read_only • sn_align_ws.spw_capacity_read • sn_gf.goal_user_read

Scenario Planning roles

Role title [name]	Description	Contains roles
sn_align_ws.scenario_approver	Can approve the scenarios for the portfolio.	sn_align_core.apw_user

Portfolio Planning with PPM roles

Role title [name]	Description	Contains roles
Portfolio Planning integrations user [sn_align_cmn_int.user]	Imports, exports, and manages planning items between Portfolio Planning and PPM.	connection_admin

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Capacity roles

Role title [name]	Description	Contains role
sn_align_ws.spw_capacity_user	Can generate resource capacity details.	sn_align_ws.spw_capacity_read
sn_align_ws.spw_capacity_read	Can view resource capacity details.	None

Financial planning roles

Role title [name]	Description	Contains roles
sn_align_ws.spw_financial_user	• Can view financials, create cost plans and expense lines, create and compare financial baselines for planning items. • Can create, edit, and view financial values in scenario planning.	None
sn_align_ws.spw_funding_user	Can view the financial widgets while comparing scenarios and approve a scenario with financial changes.	sn_align_ws.spw_financial_user

Tables installed

Table	Description
Alignment Integration [sn_align_cmn_int_integrations_setup]	Stores data of integration information for your ServiceNow instance
Choice Map sn_align_cmn_int_choice_map	Stores choice map relationships between fields of planning items of Portfolio Planning and PPM
Demand [sn_align_core_demand]	Stores records created with Demand planning item type.
Dependency [sn_align_core_dependency]	Stores data of dependencies between roadmap items.
Field Map [sn_align_cmn_int_field_map]	Stores field map relationships between planning items of Portfolio Planning and PPM

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Table	Description
Import Request [sn_align_cmn_int_import_request]	Stores imports requests from Portfolio Planning to PPM
Instance Mapping [sn_align_cmn_int_instance_mapping]	Stores mapping information between instances
Integration Error [sn_align_cmn_int_integration_error]	Stores errors for integration between Portfolio Planning and PPM
Integration Mapping [sn_align_cmn_int_integration_mapping]	Stores Integration mappings between Portfolio Planning and PPM
Lens [sn_align_core_lens]	Stores data of the lens configuration.
Lens structure [sn_align_core_lens_structure]	Stores data of lens entities and the relationship between them for different lenses.
Planning Item [sn_align_core_planning_item]	Stores the data of all planning item types.
Portfolio plan [sn_align_ws_portfolio_plan]	Stores data of portfolio plans.
Project [sn_align_core_project]	Stores records created with Project planning item type.
Roadmap configuration [sn_align_ws_roadmap_configuration]	Stores the configuration data for tables that are used to create portfolio roadmaps and free-form roadmaps.
Table Map sn_align_cmn_int_table_map	Stores table mapping relationships between planning items in Portfolio Planning and PPM

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Financials tables

Table	Description
Investment Baselines [sn_invst_pln_invst_investment_baseline]	Stores the information about the financial baselines.
Investment Baseline Headers [sn_invst_pln_invst_investment_baseline_header]	Stores all the information about financial baselines and the investment tables.
Investment Budget [sn_invst_pln_invst_budget]	Stores the migrated budget information to work on lean budgeting at required time scope.
Scenario item financial [sn_align_ws_scenario_item_financial]	Stores the updated budget value of planning items from scenario planning in simulation mode.
Scenario target [sn_align_ws_scenario_target]	Stores the portfolio-level target budget in scenario planning.

System properties installed

Portfolio Planning with PPM system properties

Name	Description

com.sn_align_cmn_int.bulk_import	• Type: Choice list
	• Default value: INSERT
	• Other possible values:
	  ○ INSERT
	  ○ <Value 2 name>:
	• Location: System Property [sys_properties] table
	• Learn more: Configure bulk import

Domain separation and Portfolio Planning

Domain separation is supported for Portfolio Planning. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

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- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

Overview of domain separation in Portfolio Planning

You can create lens, portfolio plans, planning items, and roadmaps in different domains.

How domain separation works in Portfolio Planning

After you enable domain separation on your ServiceNow instance, the data of Portfolio Planning is automatically domain separated. So, the data of lens, portfolio plans, planning items, and roadmap configuration for different domains is visible to only those users who have access to these domains.

Domain separated tables in Portfolio Planning

All the tables installed with Portfolio Planning support domain separation. For a complete list of tables, see Components installed with Portfolio Planning.

Related topics

Domain separation for service providers

Planning item reorder errors in Portfolio Planning

Review the scenarios when the reordering of items can fail in the List view of Prioritization in Portfolio Planning Workspace.

To update the rank of the planning items in the work pipeline of your portfolio plan, you can reorder the items from the List view of the Prioritization page. While doing so, the reorder can fail due to an error in the ranking configuration. Following are the scenarios where reordering of planning items can fail:

Scenario 1: Global ranking plugin is not active

Check if the Global Ranking Application plugin (com.snc.sdlc.ranking) is active in your ServiceNow instance. If not, contact your admin to activate it.

Scenario 2: Planning item doesn't have a rank configuration

Check if all the planning items that you are reordering have a rank configuration. If not, contact your admin to update rank configuration for these planning item types.

Scenario 3: Target row doesn't have a global rank

Check if the planning item before or after your target position to reorder has a global rank. If not, contact your system admin to generate a global rank for them.

Related topics

Rank planning items in Portfolio Planning Workspace

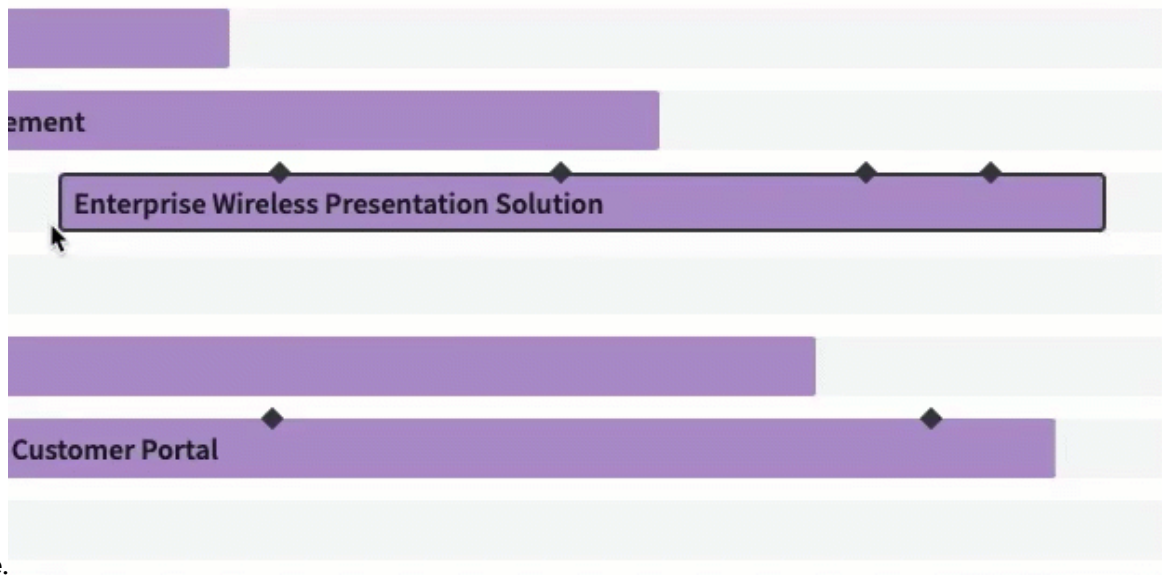
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Item milestone errors in Portfolio Planning Workspace

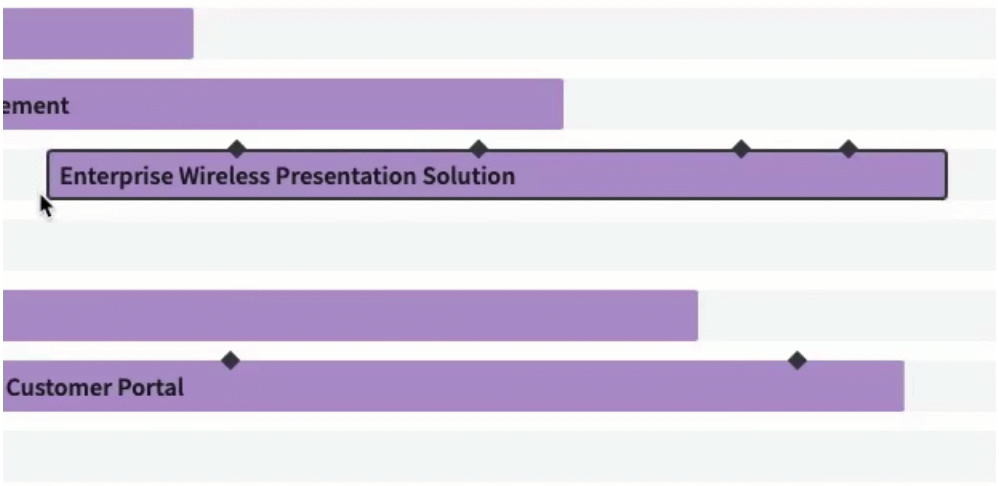
Learn about the scenarios when the planning item milestones on the portfolio plan roadmap or free-form roadmap can be in an error state in the Portfolio Planning Workspace.

An item milestone can fall out of the approved start or end dates of the item when you reschedule the existing planning item.

When you reschedule a planning item on the roadmap, the due dates of its milestones don't change. So, if the due date of a milestone is falls outside the item's date range, the indicator for that out-of-range milestone is hidden and moved to an error state. Indicators for milestones that are still within the item's date range are visible.



The milestones that are out of sync with the item's schedule can be viewed from the Milestones tab on the side panel. From the side panel, you can edit and adjust the due date of the milestone to reflect the change of plans. See Update roadmap item milestones in Strategic Planning Workspace.



Note:
You can't update a project milestone from the roadmap view. Updating project milestones may impact the associated cost and resource plans of the project. So, it's recommended to update project milestones using Project Workspace in Project Portfolio Management (PPM).

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Item dependency errors in Portfolio Planning Workspace

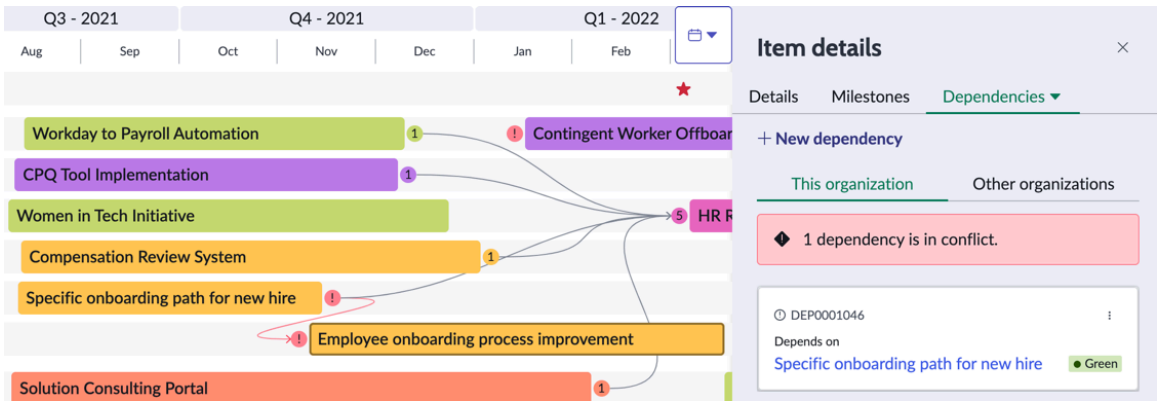
Learn about the scenarios when the planning item dependencies on the portfolio plan roadmap or free-form roadmap in Portfolio Planning Workspace can be in an error state.

A dependency between two planning items can be in an error state when a scheduling conflict exists between the items. In a linear (Depends on) dependency, the items are scheduled in a way that starting the work on one item requires completing the work on another item.

Note:
Error states are displayed for only if the planning items have a **Depends on** type of relationship.

In the sample roadmap shown here, starting work on **Employee onboarding process improvement** is dependent on the completion of **Specific onboarding path for new hire**. This relation is considered a linear dependency. Here, **Employee onboarding process improvement** is scheduled to start before the end date of **Specific onboarding path for new hire**. This conflict is indicated on the roadmap with an error icon ( ), and is also mentioned in the Dependencies tab of the Item details side panel.

To resolve such errors, review the scope of the planning items and update the start or end dates to adjust their scheduling accordingly.



Related topics

- Add dependencies for roadmap items in Portfolio Planning Workspace
- Update roadmap item dependencies in Portfolio Planning

Managing Portfolio Planning with PPM

Ensure that Portfolio Planning is integrated properly with Project Portfolio Management (PPM) following these guidelines.

- Do not change the filter condition of a table map after the records are interfaced. The already interfaced records might not match with the new filter condition and any change in the filter condition can result in data inconsistency. If you need to change the filter condition, ensure that the relevant attributes on the interfaced records are updated manually to avoid data inconsistency issues.
- Whenever a table map is created, ensure that the relevant field maps and choice maps are also configured.
- When an import job for a table map is running (processing), do not modify the table map or its field maps.

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- Using the **Converted to** field on the planning item form, you can identify the original record from which it was converted.
- Ensure that the **Lookup field** and **Lookup column** values are added whenever the execution and alignment tables are referencing two different tables, while creating a field map for field type of reference or glide list.
- If there is a data synchronization failure, check if:
  - The **Integration error logs** related list within that Alignment integration record.
  - The **Alignment table filter** (for import) and **Execution table filter** (for export) conditions are met.
  - The **Active** flag in both the alignment integration and the table map is checked.
  - The appropriate fields and choices are configured for each table map.
- If you want to view the **Execution URL** field, configure the planning item record to view it.
- If the Execution URL field in your synced planning item(s) is blank, navigate to **Portfolio Planning** > **Integrations** and click **Fix execution URL(s) for planning items**. This action creates and updates the execution URL field.
- A **Primary goal** field is introduced to the projects, demands, and epics table maps to support the integration of the **Goal** field between alignment and execution tables.
- When you are trying to import or export a project, ensure that the demands (that are a part of that project) are synced.
- You can create a table map for any execution table. If a table map is not created from one of the delivered tables (dmn_demand, pm_project) or does not extend from them, you are required to create a business rule to support the interfacing of the table map records. For more information on creating a business rule, see Create a business rule to apply a custom table map configuration.

Form field information for Portfolio Planning

Field information for forms used in the Portfolio Planning application.

Action Assignment form

Learn about the fields of the Action Assignment form. Use this form to add the **New** action button to the APW List Menu Configuration page.

Goal form

Field	Description
Action Label	Name of the action label. Enter `New`.
Action name	Name of the action. Enter `create-new-uxf`.
Implemented as	Implementation for the action. Select **UXF Client Action**.
Table	Name of the table the action is created for. Select **sys_ux_list_menu_config**.
Specify client Action	Client action. Look up and select **Create New Record**.
View	View of the form on which the action button is displayed.

Choice map form

Understand the fields of the choice map form. This form is used to create choice maps.

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Choice map form

Field	Description
Execution table column	Field column of the selected execution table that needs to be mapped. The value in this field is automatically added based on the selection made in the field map configuration.
Execution choice	Select the choice field value of the selected execution table column field.
Alignment table column	Field column of the selected alignment table that needs to be mapped. The value in this field is automatically added based on the selection made in the field map configuration.
Alignment choice	Select the choice field value of the selected alignment table column field.

Create cost plan form

Use this form to create cost plans for your planning items.

Create cost plan form

Field	Description
Name	Name of the cost plan.
Entered currency	Currency to capture the unit cost value.
Unit cost	Planned cost for the cost plan.
Quantity	Quantity of cost plans.
Total planned cost	Total planned costs value of the cost plan.
Start fiscal period	Starting month in a fiscal period for the cost plan.
End fiscal period	Ending month in a fiscal period for the cost plan.
Cost distribution	Allocate planned cost by fiscal period or duration. Select a value from the list. • **Split equally across fiscal periods** - Distributes the cost equally among all the fiscal periods across the duration. • **Recurring per fiscal period** - Recurs the cost for each fiscal period across the duration.
Cost type	Cost type of the cost plan. Select a cost type form the list.

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Create cost plan form (continued)

Field	Description
	Note: Based on the selected cost type, the **Role** and **Product model** fields appear.
Employee type	Read-only field. • **External** if Cost type is External labor Capex or External labor Opex. • **Internal** if Cost type is Labor Capex or Labor Opex.
Role	Name of the role to expense the cost plan.
Product model	Available if the Cost type is Software, Hardware, or Other Capex or Opex. Select a model from the list to expense the cost plan. Model name of a hardware expenditure to expense the cost plan.

Create expense line form

Use this form to create expense lines for your actual expense.

Create expense line form

Field	Description
Number	Auto-generated number for the expense line.
Amount	Expense incurred.
Short description	Short description of the expense. Mention unique and specific details to identify the expense line.
Date	Date of the expense.
Process date	Processed date of the expense.
Cost plan	Associated cost plan name for recording the expense line.
Cost type	Cost type of the expense. by default, the cost type of the cost plan is selected.
State	State of the expense line. Only processed expense lines are considered for an investment entity.
Expense type	Defines the expense type, internal or external.

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Create expense line form (continued)

Field	Description
	By default, the expense type is considered from the **Cost type** field entry.
Rate card	Name of the rate card.
Summary type	Business purpose of the expense line.

Dependency form

Learn about the fields of the dependency form. Use this form to add and establish dependencies between planning items on the roadmap in Portfolio Planning .

Dependency form

Field	Description
Planning item	Planning item that you selected from the roadmap, to create the dependency. Consider this as the successor item. This field is automatically filled based on your selection.
Relationship type	Choose one of the following: • Depends on: Starting the work on one item depends on finishing the work of the other item. This dependency is considered a linear relationship. • Relates to: Work of the two items is related to each other but doesn't have a strict dependency on each other's completion. This dependency is considered a non-linear relationship.
Planning item	Planning item that is required. Consider this as the predecessor item.
Number	System-generated unique identification number for the dependency.

Field map form

Understand the fields of the field map form. This form is used to create mappings for a corresponding table map.

Field map form

Field	Description
Execution table	Table in Agile Development 2.0, SAFe, or PPM that needs to be mapped with a table in Strategic Planning. The value in this field is

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Field map form (continued)

Field	Description
	automatically added based on the selection made in the table map configuration.
Execution table column	Field column of the selected execution table that needs to be mapped.
Alignment table	Table in Strategic Planning that needs to be mapped with a table in Agile Development 2.0, SAFe, or PPM. The value in this field is automatically added based on the selection made in the table map configuration.
Alignment table column	Field column of the selected alignment table that needs to be mapped.
Flow type	Specifies whether the mapping is done from alignment to execution, execution to alignment, or both. Here, alignment implies Strategic Planning, and execution implies PPM, Agile Development 2.0, and SAFe applications.

Demand planning item form

Learn about the fields of the demand form. Use this form to create or edit the details of a planning item of the type Demand in Portfolio Planning.

These fields are displayed on the full details page of the planning item.

Demand planning item form

Field	Description
Name	Brief description of the planning item.
Description	Detailed information of the planning item.
State	Current working state of the planning item.
Owner	User assigned to this planning item.
Planning state	State of the planning item in the Strategic Planning Backlog.
Category	Category of this planning item. Choose from **Strategic** or **Operational**.
MoSCoW	Priority of this planning item based on its importance. The available options are: • **1 - Must have** • **2 - Should have** • **3 - Could have** • **4 - Won't have**

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Demand planning item form (continued)

Field	Description
Portfolio	Portfolio that this planning item is associated to.
Program	Program that this planning item is associated to.
Product	Product that this planning item is associated to.
Strategic program	Strategic program that this planning item is associated to.
Primary goal	Goal that is associated with this planning item as the primary goal.
Product enhancement	Product enhancement that this planning item is associated to.
Primary target	Target that is associated with this planning item as the primary target.
Work notes	Notes to capture the updates and discussions on the planning item as the work progresses.
Strategic priority	Strategic priority that this planning item is associated to.

Dates section of the Demand planning item form

Field	Description
Approved start date	Approved start date for this planning item.
Approved end date	Approved end date for this planning item.
Planned start date	Date on which the work for this planning item is planned to start. This value is copied from the **Approved start date** field.
Planned end date	Date on which the work for this planning item is planned to be complete. This value is copied from the **Approved end date** field.

Details section of the Demand planning item form

In this section, capture additional details for this planning item such as Investment type, Execution type, impacted business application, and more.

Field	Description
Investment class	Choose from **Run** and **Change**
Investment type	Type of investment this planning item comes under. For example, if completing work on this item improves the user experience for your product, select **End User Experience**.

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Details section of the Demand planning item form

In this section, capture additional details for this planning item such as Investment type, Execution type, impacted business application, and more.

(continued)

Field	Description
Priority	Priority of this planning item.
Business application	Business application that this planning item is related to.
Other impacted business applications	Business applications that this planning item has an impact on.
Business capabilities	Business capabilities of this planning item.

Business case section of the Demand planning item form

In this section, capture business details for this planning item such as risks, scope, blockers for this planning item.

Field	Description
Business case	Business case to invest in this planning item.
Risk of performing	Risks to the business if work on this planning item is completed.
Risk of not performing	Risks to the business if work on this planning item isn't completed.
Enablers	Enablers for this demand.
Barriers	Blockers, if any, for this planning item.
In scope	Defined criteria for this planning item.
Out of scope	Clearly defined criteria that is not necessary for this planning item.
Assumptions	Assumptions, if any, to work on this planning item.

Financials section of the Demand planning item form

In this section, capture financial details for this planning item such as cost, CapEx, OpEx, benefit, ROI, and other estimates.

Field	Description
Planned cost	Planned cost to take up this planning item.
Planned capEx	Planned capital expenditure for this planning item.
Planned opEx	Planned operational expenditure for this planning item.
Planned ROI	Planned return of investment for this planning item.

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Financials section of the Demand planning item form

In this section, capture financial details for this planning item such as cost, CapEx, OpEx, benefit, ROI, and other estimates.

(continued)

Field	Description
Financial return	Financial return on this planning item.
Planned benefit	Planned benefit from this planning item.

Assessment data section of the Demand planning item form

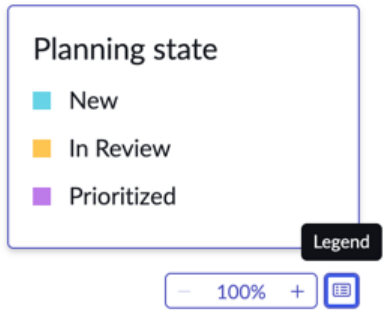
Field	Description
Impact	Impact that this planning item has on the business.
Risk	Numerical value for the risk associated with this planning item.
Value	Numerical value for the value obtained with this planning item.
Score	Score of the planning item.

Highlighted Value Condition form

Learn about the fields of the Highlighted Value Conditions form. Use this form to configure the display of highlighted fields in Portfolio Planning workspace.

Field	Description
Condition	Condition for the field value. For example, Status is Green.
Color	Color for the field value that meets the condition specified.
Application	Scope of yourServiceNow instance. By default, this field is set to **Portfolio Planning**.
Order	Order in which this color appears on the legend in the Hierarchy view of the Prioritization page. For example, for the Planning Status column, the value **New** is given the order 1.

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Field	Description
	
Hide Label	Option to hide the label for the highlighted value condition. When selected, the Label field is not available.
Label	Name of the label displayed for the highlighted value condition. This field is not available when **Hide Label** is selected.
Show Icon	Option to show icon beside the field value.
Icon	Icon that is displayed beside the field value. This field is shown only if the **Show Icon** field is selected.
Variant	Option to define color variant. The available options are **primary**, **secondary**, and **tertiary**.
Value Override	Custom display text that replaces the actual field value in the view. When specified, the override text appears instead of the stored value.

Highlighted Value form

Learn about the fields of the Highlighted Value form. Use this form to customize the fields to be highlighted on the Prioritization page of a portfolio plan in Portfolio Planning workspace.

Field	Description
Table	Table which contains the highlighted columns. Enter **sn_align_core_planning_item**.
Application	Scope of yourServiceNow instance. By default, this field is set to **Portfolio Planning**.
Field	Column of the table that is highlighted in the workspace.

Lens Form

Learn about the fields of the Lens form. Use this form to create a lens in Portfolio Planning.

Lens form

Field	Description
Name	Name of the lens.

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Lens form (continued)

Field	Description
Active	Indicates if the lens is active.
Description	Brief description of the lens. You can indicate the business purpose of this lens and the planning managers that would use this lens.
Planning items	Type of work that can be planned using this lens. Move the desired planning item types from the **Available** list to the **Selected** list.

Lens structure form

Learn about the fields of the Lens structure form. Use this form to define a structure for your lens in the Portfolio Planning application.

Lens structure form

Field	Description
Entity	Source table for your lens entity. An entity represents a planning level in the perspective of your lens. Select the entity that is relevant for your planning persona from the perspective of this lens. For example, Department, Product Model, or Business Objective.
Entity filter	Conditions to filter data from your entity source. The filtered data is shown on the workspace for your planning persona to select and plan for.
Top entity	Indicates if this entity is the top-level entity of your lens structure.
Parent entity	Entity that is one level above this entity in your current lens structure. This field is available only if the **Top entity** field isn't selected.
Reference to parent entity	Column in the current entity table that references the parent entity table. For example:

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Lens structure form (continued)

Field	Description
	• Entity is **Strategic Program [sn_align_core_program]** • Parent entity is **Department [cmn_department]** Then the field of the Strategic Program [sn_align_core_program] table that references the Department [cmn_Department] table would be **Department**. This field is available only if the **Top entity** field isn't selected.

Related topics

Modify lens structure in Portfolio Planning

List Applicability form

Learn the field information for the List Applicability form. Use this information to define audience for the newly created lists for Portfolio Planning workspace.

Field	Description
List	Name of the list that you want to define audience for.
Application	This field is set to **Portfolio Planning** by default.
Applicability	Audience for this list. Set this field to **Alignment Workspace Home Audience**.
Active	Option to enable this applicability to the list.

Planning item milestone form

Learn about the fields of the planning item milestone form. Use this form to create milestones for the planning items in your roadmap in Portfolio Planning.

Field	Description
Name	Preferred name for your milestone.
Type	Milestone type. Select one from the following: • Deadline • Key Milestone • Key Event

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Field	Description
	• Launch Date • Important Date
Due date	The date of the milestone.
State	Status of the milestone. Select one from the following: • Upcoming • Missed • Achieved
Assigned to	User who is assigned to the milestone.
Description	Brief description about the milestone.

Project planning item form

Learn about the fields of the project form. Use this form to create or edit the details of a planning item of the type Project in Portfolio Planning.

These fields are displayed on the full details page of the planning item.

Project planning item form

Field	Description
Name	Brief description of the planning item.
Description	Detailed information of the planning item.
Status	Status of the planning item.
Owner	User assigned to this planning item.
State	Current working state of the planning item.
Percent complete	Percentage of work completed for this planning item.
Planning state	State of the planning item in the Strategic Planning or Portfolio Planning Backlog.
MoSCoW	Priority of this planning item based on its importance. The available options are: • **1 - Must have** • **2 - Should have** • **3 - Could have** • **4 - Won't have**
Portfolio	Portfolio that this planning item is associated to.
Program	Program that this planning item is associated to.

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Project planning item form (continued)

Field	Description
Product	Product that this planning item is associated to.
Strategic program	Strategic program that this planning item is associated to.
Product enhancement	Product enhancement that this planning item is associated to.
Primary goal	Goal that is associated with this planning item as the primary goal.
Primary target	Target that is associated with this planning item as the primary target.
Work notes	Notes to capture the updates and discussions on the planning item as the work progresses.
Strategic priority	Strategic priority that this planning item is related to.

Dates section of the Project planning item form

Field	Description
Planned start date	Date on which the work for this planning item is planned to start. This value is copied from the **Approved start date** field.
Planned end date	Date on which the work for this planning item is planned to be complete. This value is copied from the **Approved end date** field.
Approved start date	Approved start date for this planning item.
Approved end date	Approved end date for this planning item.
Actual start date	Actual date on which the work for this planning item has started.
Actual end date	Actual date on which the work for this planning item is complete.

Details section of the Project planning item form

In this section, capture additional details for this planning item such as Investment type, Phase of the planning item, Execution type, affected business application, and more.

Field	Description
Investment class	Type of investment class that this planning item comes under. Choose from **Run** and **Change**
Investment type	Type of investment that this planning item comes under. For example, if completing work

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Details section of the Project planning item form

In this section, capture additional details for this planning item such as Investment type, Phase of the planning item, Execution type, affected business application, and more.

(continued)

Field	Description
	on this item improves the user experience for your product, select **End User Experience**.
Demand	Demand that this planning item is associated with.
Execution type	Execution methodology for this planning item. Select from **Waterfall**, **Agile**, or **Hybrid**. This field is available only if the planning item is of the type Project.
Priority	Priority of this planning item.
Phase	Phase of this planning item. This field is available only if the planning item is of the type Project.
Business application	Business application that this planning item is related to.
Other impacted business applications	Business applications that this planning item has an impact on.
Business capabilities	Business capabilities of this planning item.

Business case section of the Project planning item form

In this section, capture business details for this planning item such as risks, scope, and blockers for this planning item.

Field	Description
Business case	Business case to invest in this planning item.
Risk of performing	Risks to the business if work on this planning item is completed.
Risk of not performing	Risks to the business if work on this planning item isn't completed.
Enablers	Enablers for this project.
Barriers	Blockers, if any, for this planning item.
In scope	Defined criteria for this planning item.
Out of scope	Clearly defined criteria that is not necessary for this planning item.
Assumptions	Assumptions, if any, to work on this planning item.

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Financials section of the Project planning item form

In this section, capture financial details for this planning item such as cost, CapEx, OpEx, benefit, ROI, and other estimates.

Field	Description
Planned cost	Planned cost to take up this planning item.
Planned capEx	Planned capital expenditure for this planning item.
Planned opEx	Planned operational expenditure for this planning item.
Planned benefit	Planned benefit from this planning item.
Actual benefit	Actual benefit achieved from this planning item,
Estimate to completion	Estimated cost to complete work on this planning item.
Actual cost	Actual cost on this planning item.
Actual capEx	Actual value of capital expenditure for this planning item.
Actual opEx	Actual value of operational expenditure for this planning item.
Planned ROI	Planned return of investment for this planning item.
Planned return	Financial return on this planning item.
Estimate at completion	Estimated cost at the time that work on this planning item is completed.

Score section of the Project planning item form

In this section, capture scoring details for this planning item such as score, value score, risk score, and size score.

Field	Description
Score	
Value score	Score for the value obtained with this planning item.
Risk score	Score for the risk associated with this planning item.
Size score	Score for the job required to complete the task.

Roadmap configuration form

Learn about the fields of the roadmap configuration form. Use this form to add new tables to roadmap preferences and configure their details in Portfolio Planning.

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Roadmap configuration form

Field	Description
Source table	Table that is used to build your roadmap.
Start date field	Field that is used for the start date of the roadmap item. For example, **Planned start date**.
End date field	Field that is used for the end date of the roadmap item. For example, **Planned end date**.
Item name field	Field that is used for the name of the roadmap item. For example, **Short description**.
Item owner field	Field that is used for the owner of the roadmap item. For example, **Assigned to**.
Status	Field that is used for the status of the roadmap item.
Percent Complete	Field that is used to track the completion of the roadmap item. This field value is used to visualize the progress of the roadmap item in the tracking mode.
Group by fields	List of fields with which the roadmap items can be categorized into groups. For example, the **State** attribute can be used to categorize the items into groups of states such as Draft, Ready, Work in progress, and others.
Color by fields	List of fields with which the roadmap items can be categorized by color. For example, the **Planning item type** attribute can be used to assign a unique color to each group of items belonging to a specific type.
Metric fields	List of fields used as the metrics for the roadmap items.

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Roadmap configuration form (continued)

Field	Description
	For example, **Planned benefit** or **Actual cost**. These values are displayed when you point the mouse cursor on the roadmap item.

Table map form

Understand the fields of the table map form. This form is used to create a new custom table map for any record to integrate with Agile Development 2.0, SAFe, and PPM.

table map form

Field	Description
Alignment Integration	Specifies the Alignment integration type. The value is **ServiceNow Internal** by default.
Execution table	Table in Agile Development 2.0, SAFe, or PPM that needs to be mapped with a table in Strategic Planning. For example, Defect [rm_defect].
Alignment table	Table in Strategic Planning that needs to be mapped with a table in Agile Development 2.0, SAFe, or PPM. For example, Milestone [sn_milestones_milestone].
Milestone table map	This field is relevant only for Project [pm_project] table map. It is a reference to the new Milestone table map (sn_milestones_milestone) for integrating project milestones from Project Portfolio Management workspace to Strategic Planning. For all the other table maps, the milestone table map field is not available.
Execution table filter	Filter condition to retrieve the relevant records from PPM, Agile Development 2.0, or SAFe. For example, Portfolio is HR or Active is True.
Alignment table filter	Filter condition to retrieve the relevant records from Strategic Planning.
Active flag	Ensures that the table map sync is active. This field is checked by default.
Sync attachments	Ensures that the attachments are synced between the applications. This field is checked by default.

Roadmap milestone form

Learn about the fields of the roadmap milestone form. Use this form to create a milestone for the timeline of your roadmap in Portfolio Planning.

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Field	Description
Name	Preferred name for your milestone.
Type	Milestone type. Select from one of the following: • Key Event • Launch Date • Important Date • Deadline • Key Milestone
Due date	The date of the milestone.
Assigned to	User who is assigned to the milestone.

Scheduled Script Execution form to generate labor costs for projects and demands

Use the Scheduled Script Execution form to enable Generate Labor Costs scheduler job for projects and demands.

Schedule Item form

Field	Description
Name	Name that identifies this scheduled job.
Active	Option that indicates that scheduled job is active and should be executed at the specified date and time.
Run	Time interval to use for running the scheduled job: • **Daily**: Runs daily, at a designated time. • **Weekly**: Runs on a weekly basis, at a designated time and day of the week. • **Monthly**: Runs on a monthly basis, at a designated time and day of the month. • **Periodically**: Runs on a designated repeating interval. • **Once**: Runs for a single occurrence only. • **On Demand**: Runs immediately on demand. • **Business Calendar: Entry Start**: Runs on the starting entry dates for the business calendar that you select in the **Business Calendar** field. A scheduled job runs for the starting date of each of the business entries that you defined for the business calendar. For example, if the business calendar represents a fiscal year, and the starting date of each entry is a fiscal month, the scheduled job runs on the first day of each month. • **Business Calendar: Entry End**: Runs for the ending date for the business calendar that you select in the **Business Calendar** field. This selection runs in

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Schedule Item form (continued)

Field	Description
	the same manner as **Business Calendar: Entry Start**, but for the end dates of the associated business calendar entries. **Note:** When you select **Business Calendar: Entry Start** or **Business Calendar: Entry End**, you can apply an offset factor to schedule the job to run before or after the time span of the selected business calendar. To learn more, see the **Offset type** and **Offset** fields. To learn more about creating and using business calendars and defining business calendar entries, see Creating business calendars and Define business calendar entries.
Time zone	Time zone to use with the **Time** field entry when you specify the time at which the scheduled job should run. Select a time zone entry: • **-None-**: Use the default time zone for the logged-in user who is creating the scheduled job. For example, the scheduled job runs at 04:45 p.m. US/Pacific time if it is the user's assigned time zone, and you enter `16 : 45` into the **Time** field. • **Use System Time Zone**: Use the default system time zone that is specified for the instance in which it runs. For example, the scheduled job runs at 10:15 p.m. London time if Europe/London is the default system time zone for the instance, and you enter `22 : 15` in the **Time** field. • Actual time zone. For example, the scheduled job runs at 1:30 p.m. in the US Eastern time zone if you select **US/Eastern**, and enter `13 : 30` in the **Time** field.
Day	Day on which the scheduled job should run. • If **Run** is set to **Weekly**, select the day of the week. For example, select Wednesday. • If **Run** is set to **Monthly**, select the day of the month. For example, select 25 for the 25th day of the month. This field appears only if you select **Monthly** or **Weekly** in the **Run** field.
Repeat Interval	Duration of the repeat interval for each scheduled job execution. Enter the duration in the number of days, hours, or minutes. For example: • To run the scheduled job every four days, enter `04` in the **Days** field. • To run it every 26 hours, enter `26` in the **Hours** field. • If it should repeat at an interval of 13:30:25, enter `13` in the **Hours** field, and then enter `30` and `25` in the two unlabeled fields after it. These fields appear only if you select **Periodically** in the **Run** field.

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Schedule Item form (continued)

Field	Description
	Note: This setting does not account for Daylight Saving Time changes. For example, if you select a period of one day, the calculation adds 24 hours to the starting time of the job. If the start time is in a Daylight Saving Time (DST) period, the job runs with a one-hour offset when that time zone is not in DST.
Business Calendar	Business calendar entry that you are using to determine the business calendar start or end date for the scheduled job. This field appears only if you select **Business Entry: Start Date** or **Business Entry: End Date** in the **Time** field.
Offset Type	Type of time offset, if any, to apply to the business calendar that you selected for scheduling this job: • **Past**: Apply an offset factor to schedule the job to run before the start of the time span of the selected business calendar. • **Future**: Apply an offset factor to schedule the job to run after the end of the time span of the selected business calendar. • **--None--**: Do not apply a time offset when scheduling this job. Adding an offset factor enables you to schedule the job to run before, or after, the formal time span that is defined in the business calendar for the following use cases: • Schedule a job at a certain time, outside of the time span for the selected business calendar. • Arrange multiple jobs to run in sequence, around the time span of the selected business calendar. The **Offset type** and **Offset** fields appear only if you select **Business Calendar: Entry Start** or **Business Calendar: Entry End** in the **Run** field.
Offset	Amount of time offset, expressed in days, hours, minutes, and seconds, to apply to the business calendar that you selected for scheduling this job. For example, if you want to schedule the job to start three days, 14 hours, 10 minutes, and 45 seconds before the business calendar start date, do the following actions: • Select **Past** in the **Offset type** field. • Enter **3** in the **Days** field. • Enter **14**, **10**, and **45** in the **Hours** field. The **Offset Days** and **Hours** fields appear only if you select **Business Calendar: Entry Start** or **Business Calendar: Entry End** in the **Run** field, and **Past** or **Future** in the **Offset type** field.
Time	Time of day at which the scheduled job should run, expressed in hours, minutes, and seconds on a 24-hour clock. The selection that you make in the **Time zone** field determines the time zone for this entry.

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Schedule Item form (continued)

Field	Description
	Note: Time values are always saved in the ServiceNow AI Platform® in UTC time and then translated into the proper time. This translation depends on the selected **Time zone** and the entry in the **Time** field. This field appears only if you select **Daily**, **Weekly**, or **Monthly** in the **Run** field.
Starting	Date and time of the first scheduled job generation. Select the calendar date and time. This field appears only if you select **Periodically** in the **Run** field.
Priority	Numerical priority for the scheduled job: • Set essential jobs to a priority value below 100. • Set nonessential jobs to a priority above 100. • If 70 percent or more of all scheduled jobs are **Overdue**, any jobs that are marked with a value above 100 do not run.
Run as	Name of the user who is creating and running the scheduled job. To assign the scheduled job to the system instead of the person creating the scheduled job, create a system or dummy user and add it to this field.
Conditional	Option for enabling the running of the scheduled job if certain conditions are met in the associated script.
Condition	Conditional script that determines if a scheduled job should run. The last expression of the script should evaluate to a Boolean (true/false) value. This text box appears only if you select **Use conditions**.
Starting	Date and time of the first scheduled job generation. Select the calendar date and time. This field appears only if you select **Periodically** in the **Run** field.

UX List Category form

Learn about the fields of the UX List Category form. Use this form to create additional categories for lists in the Lists menu of Portfolio Planning workspaces.

Field	Description
Title	Display name of the category in the workspace.
Application	Application scope. Ensure that this is set to **Portfolio Planning**.
Order	Order in which this category is displayed in the workspace.
Active	Option to enable the display of this category in the workspace.
Description	Brief description of the category.
Configuration	Configuration that the category is referencing.

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Field	Description
	By default, this field is set to **APW List Menu Configuration**.

Related topics

Customize Lists in Portfolio Planning Workspace

UX List form

Learn about the fields of the UX List form. Use this form to create additional lists in the Lists menu of Portfolio Planning workspaces.

Field	Description
Title	Display name of the category in the workspace.
Application	Application scope. Ensure that this is set to **Portfolio Planning**.
Order	Order in which this category is displayed in the workspace.
Category	Category that this list would be displayed under, in the workspace.
Active	Option to enable the display of this category in the workspace.
Table	Source table for the list.
Configuration	Configuration that the category is referencing. By default, this field is set to **APW List Menu Configuration**.
Conditions	Conditions to filter the records of the source table.
Fixed query	Current fixed query conditions applied to the list.
Columns	Columns of the table that must be displayed in the list in the workspace.
Group by column	Attribute that would be used to group the list of records by.
View	View to determine which columns are displayed in the list in the workspace. If you select a view, the **Columns** field is disabled.

Related topics

Customize Lists in Portfolio Planning Workspace

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Strategic Planning

Strategic Planning Workspace (SPW) enables you to manage product feedback, portfolio planning, and enterprise agile planning for your organization. Evaluate product performance, align work with strategy, and scale your Agile framework from a single workspace.

Strategic Planning is available for users with a Strategic Portfolio Management (SPM) Pro license.

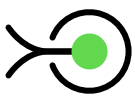
Explore the Gen AI features in strategic planning application. Use Multi feedback summarization skill to generate summaries of one or multiple feedback and save time on manual feedback analysis. Use Planning item Gen AI Docs skill to generate a summary of selected text in Docs and quickly understand the details.

Installing Strategic Planning also installs Product Feedback, Portfolio Planning, and Enterprise Agile Planning features. Access to these features is based on the user roles assigned. Learn more about these features in the following sections.

Get started



Feedback



Portfolio Planning



Enterprise Agile Planning



Dashboards

Troubleshoot and get help

- Ask or answer questions in the Strategic Portfolio Management forum on the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Feedback

Build a customer-centric feedback management system and optimize the process of creating and associating feedback and product ideas with Feedback application.

https://player.vimeo.com/video/1015698735?h=308bd4151e&badge=0&autopause=0&player_id=0&app_id=58479

Feedback overview

The Feedback application is available for users with a Strategic Portfolio Management (SPM) Pro license.

The Feedback application simplifies the process of gathering and analyzing user feedback to make informed decisions on your product. The intuitive interface provides real-time feedback on your product features, usability, and performance and help users to share their thoughts. With Feedback application, you create feedback or product ideas and link them with a feedback or product idea or planning or non-planning items.

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Leverage the multi-feedback summarization skill to quickly summarize one or multiple feedback and streamline feedback analysis. Create planning or non-planning items by copying the generated summary and save time on manual item creation. Use the Planning item Gen AI Docs skill to generate a summary from selected content in Docs.

Get started

Explore  Learn the key features and business value of Feedback in Strategic Planning	Configure  Set up the core configuration for Feedback
Use  Manage feedback or product idea and take feedback-driven decisions	Reference  Get information about components, forms, tables, and system properties

Troubleshoot and get help

- Ask or answer questions in the Strategic Portfolio Management forum of ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Feedback application in Strategic Planning

Learn how to manage feedback and product ideas and make informed decisions in the Feedback application.

Feedback overview

The Feedback application is designed to collect, manage, and evaluate feedback and product ideas. Feedback is received from various sources such as emails, social media, chats, meetings, and the Idea portal. With Feedback, you can analyze feedback on your product, link feedback to a product idea. You can associate feedback or a product idea directly to a planning or non-planning item. This application aligns customer feedback with the product roadmap, identify trends and statistics, and track the progress of feedback implementation.

Feedback benefits

With Feedback, you can:

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- Gather feedback from users and make data-driven decisions about product development, improvements, and future strategies.
- Create feedback or product ideas and link them with a feedback or product idea or planning or non-planning items.
- Import ideas from the Idea portal to Feedback application.
- Configure Microsoft Outlook add-ins to submit feedback directly from your Outlook account.
- Configure an email account in your instance so that sending emails to this configured email address creates a feedback record.

Benefit	Feature	Role
Capture and evaluate feedback from multiple sources to make informed decisions on your product.	Create Feedback in Strategic Planning	pf_user
Create and prioritize product ideas that can be implemented.	Create Product idea in Strategic Planning	pf_user
Manage your feedback by associating it with one or multiple product ideas that can be evaluated, prioritized, and worked on.	Associate feedback with a product idea	pf_user
Link your feedback or product idea to a planning or non-planning item to address concerns.	Associate a feedback or product idea with a planning item and Associate a feedback or a product idea record with a non-planning item	pf_user
Associate and manage goals associated with product ideas.	Associate a product idea with a goal	pf_user and goal_user
Collect and manage documents, files, or resources associated with product ideas.	Docs in Feedback	pf_user
Import ideas from the Idea portal to Feedback.	Integrate the Idea portal with Feedback application	sn_align_core.apw_admin
Create or submit feedback from the Microsoft Outlook directly without disturbing the workflow.	Submit feedback from Microsoft Outlook	pf_user
Configure the non-planning items that you want to link with the feedback or product idea without having to switch between related items.	Configure non-planning items for feedback or product ideas records	admin
Configure filters for feedback or product idea overview page to get information based on your preference.	Filter configuration	admin
Generate concise and informative summary of customer feedback using Now Assist for SPM.	Summarize the feedback by using Now Assist for Strategic Portfolio Management (SPM)	pf_user

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Benefit	Feature	Role
Generate a summary of selected text using Planning item Gen AI Docs skill.	Generate the summary for selected or complete content with Planning item Gen AI Docs skill in Strategic Planning	pf_user
Refine planning item description using write planning item skill.	Refine planning items content using write planning item skill	sn_align_core.apw_user

Related topics

- Configuring Feedback application in Strategic Planning
- Managing Feedback application in Strategic Planning
- Feedback reference

Configuring Feedback application in Strategic Planning

Configure Feedback application with other applications to submit your feedback.

Install the Strategic Planning application from ServiceNow Store and start configuring Feedback application. For more information on how to install Strategic Planning, see Install Strategic Planning.

Related topics

- Configuring Strategic Planning Workspace

Install ServiceNow® Add-in for Microsoft Outlook

Configure user roles and download the office add-in manifest file to use the ServiceNow® add-in for Microsoft Outlook.

Before you begin
Role required: admin

Note:

Verify that you have a ServiceNow® add-in for Microsoft Outlook (com.sn_outlook_addin).

Procedure

1. Navigate to **All** > **ServiceNow Add-Ins for Office** > **Office Add-In-Manifests** from your ServiceNow instance.
2. Select **ServiceNow for Feedback**.
3. Select **Download Manifest**.
4. Open your email account in Microsoft Outlook.
5. From the more items menu, select **Get Add-ins** > **My add-ins** > **Add a custom add-in** > **Add from File**.
6. Select the `manifest.xml` file that you've downloaded from your ServiceNow® instance and select **Open**.
7. Select **Install**.
   The ServiceNow for Feedback tile is added in the custom add-ins section.

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8. From the more items menu, select **ServiceNow for Feedback**, and log in with your credentials. You can connect to your Microsoft Outlook account with your ServiceNow® instance.

Related topics

Create feedback from Microsoft Outlook

Configure email for feedback submission

Create feedback from Microsoft Outlook

Create or submit feedback from Microsoft Outlook directly. By configuring feedback creation and submission within Microsoft Outlook, project managers can easily provide feedback without having to switch between different applications.

Before you begin
Role required: pf_user

About this task
Project managers can provide feedback while performing their daily tasks on Microsoft Outlook. For example, if a Product Manager receives feedback over an email, they can submit the email directly as feedback using an Microsoft Outlook add-in without disrupting the workflow.

Procedure

1. From your Microsoft Outlook account, select an email that you want to use as feedback.
2. Select the **ServiceNow for Feedback add-in**.

   The subject of the email is copied as the name of the feedback, and the body of the mail is added as the description. The source is auto-populated as **Email**.
3. From the Type list, select the **Type** of feedback.
4. From the **Assigned to** list, select the user.
5. Add a **Tag** to the feedback and select **Save**.

Configure email for feedback submission

Configure email settings in your instance and send an email to this id to create feedback.

Before you begin
Role required: admin

About this task
Configure email settings in your instance use it to send an email directly. With the *sn_apw_advanced.feedback.idea_feedback_queue_address* system property, you can configure email settings within your instance and submit feedback directly from your email account.

Procedure

1. Navigate to your instance.
2. Navigate to **All** > **System Properties** > **Email Properties**.
3. **Optional:** Update the email properties.

   a. Set **Email sending enabled & Email receiving enabled** to **Yes**.

   b. Set **Automatically create users for incoming emails from trusted domains** to **Yes**.

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(Optional) The default value for this field is **No**. You can select **Yes** to automatically create a user in the user table.

c. Select **Save**.

4. Update the system properties list.

a. Navigate to **All** > **System properties** > **All properties** and search for *sn_apw_advanced.feedback.idea_feedback_queue_address* property.

b. Open the *sn_apw_advanced.feedback.idea_feedback_queue_address* property and enter your instance email id in the **Value** field.
Any configured email account can be used.

5. Select an existing email to forward as feedback or create feedback.

6. Select **Send**.

Integrate the Idea portal with Feedback application

Integrate the Idea portal with Feedback application to enable collaboration of product ideas with feedback.

Before you begin
Role required: sn_align_core.apw_admin

About this task
One-way synchronization is supported and mapping is done from the idea portal to Feedback. All the ideas are imported to Feedback. These ideas are created as feedback records in the Feedback and the number of votes received for each idea is also imported. You can assess feedback popularity with the number of votes received and prioritize them to make informed decisions.

Procedure

1. Go to your ServiceNow instance.

2. Navigate to **All** > **Strategic Planning** > **Integrations**.

3. View the alignment integrations for the internal applications by selecting **ServiceNow Internal**.

4. Create the table map between feedback and idea table by selecting **Generate Default Mapping Configurations**.
Mapping configurations consist of table, field, and choice maps for each record. For more information on creating custom mapping configurations between feedback and other tables, see Create custom mapping configurations.

Configure non-planning items for feedback or product ideas records

Configure non-planning items to link your feedback or product idea records to navigate quickly between related items.

Before you begin
Role required: admin

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Procedure

1. Navigate to **All** > **System properties** > **All properties**.
2. Open the *sn_apw_advanced.product_feedback_allowed_non_planning_items_for_link_item* property.
3. Edit the property by selecting **here**.
4. In the value field, enter the non-planning item table name and select **Update**.
   You can add the table name of an incident, case, scrum task, agile story, or tables from any global or scoped application. You can enter one or multiple table names separated by comma in the value field.
5. Configure the non-planning items that you want to link.
   a. Navigate to **All** > **System Definition** > **Tables**.
   b. Search for feedback from the Label list.
   c. Open the feedback record that has the *sn_align_core_feedback* table name and select the **Show List** related link.
   d. Open any feedback record, select the additional actions ( ).
   e. Select **Configure** > **Related Lists**.
   f. Select the **Edit this view** link.
   g. Move Related Items from Available panel to Selected panel.
   h. Select **Save**.
6. Configure a form view with view name `workspace_apw_new` for all the non-planning item tables added in step 4.

What to do next

Associate a feedback or a product idea record with a non-planning item

Configure the filters for feedback or product idea overview page

Configure the filters for the feedback or product idea overview page to display information based on the preferences of your users. Use filters to find and engage with feedback and product ideas that are the most relevant to their interests.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System properties** > **All properties**.
2. Open the *sn_apw_advanced.product_feedback_product_idea_filters* property.
3. Edit the property by selecting **here**.
4. In the value field, enter the field name in the query.
   You can add field names in the JSON query. JSON has column objects for each filter. Each column object has two properties:
   - fieldname: The field name on the feedback or product idea table.
   - encodedQuery: The filter on the reference table.

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You can only add reference or choice type fields on the feedback or product idea tables as filters. You can either add a new filter or add a condition to the existing filter.

5. Select **Update**.

Managing Feedback application in Strategic Planning

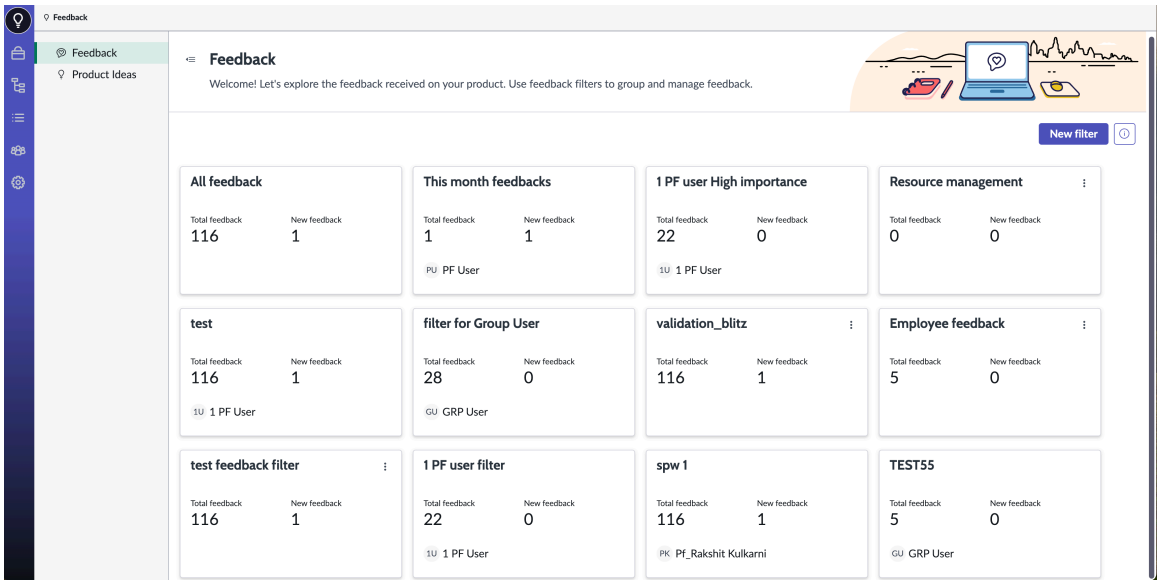
Use Feedback application in Strategic Planning and create Feedback and product ideas to take data driven decisions during product development. Associate the feedback with a product idea or with a planning or non-planning item that can be tracked, prioritized, and implemented.

Use the following components to manage your Feedback within Strategic Planning.

- Feedback
- Product idea

Feedback

Feedback refers to a suggestion, issue, proposed solution, or problem statement provided by users or customers for a product. Strategic Planning enables you to collect feedback from multiple sources and review the incoming feedback to understand the critical issues or feature requests. You can create feedback filters from feedback homepage. For more information on feedback filters, see Create feedback filters in Strategic Planning.



Feedback overview

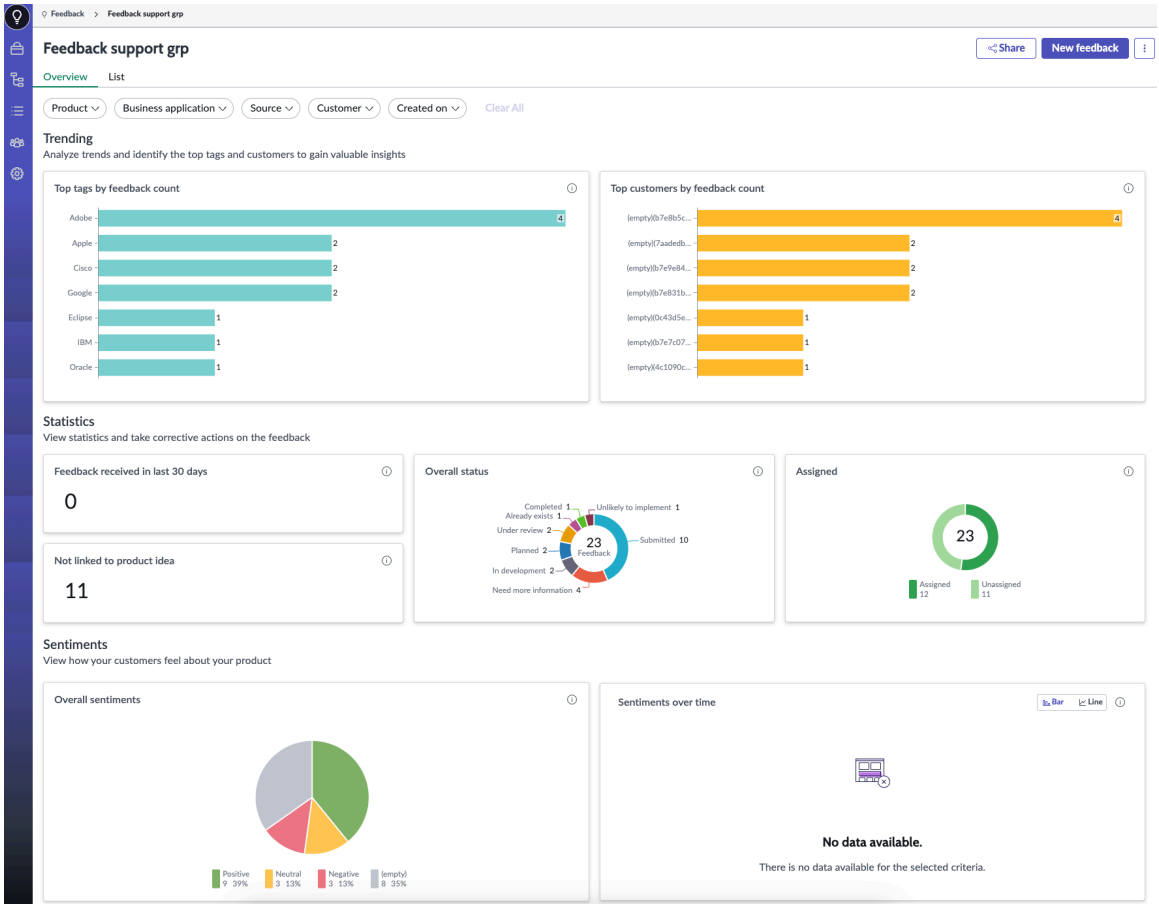
Get insights of feedback, number of product ideas linked to feedback, top tags, and customers based on the feedback count on the overview page. View trends and statistics based on these filters:

- Top tags, which are majorly used to conclude on the focus areas
- Top customers who are most actively submitting feedback
- Feedback received in the last seven days
- Feedback that is not linked to any product idea
- Feedback based on the overall status
- Feedback that is assigned and unassigned to the user

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- Identify the overall sentiment distribution across your feedback data.
- Analyze the sentiments of the feedback received over the past nine months.

The following figure shows a sample overview of customer feedback and indicates the different features on the overview tab. For example, know which customer has provided the maximum feedback by viewing the feedback count based on top customers. Use the filters at the top of the page to view feedback information on the Feedback application. For more information on filters, see Configure the filters for feedback or product idea overview page.

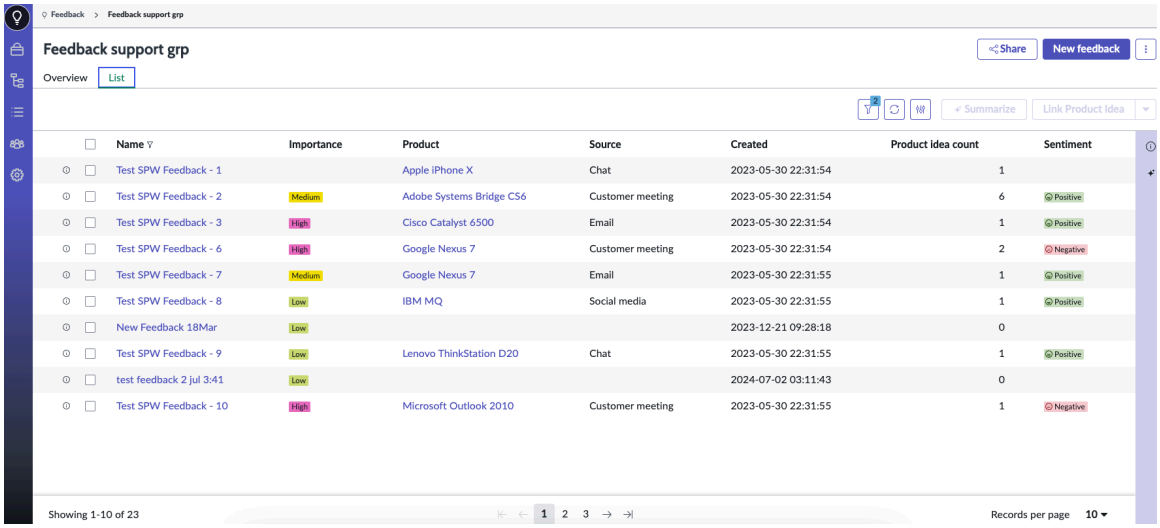


Feedback List view

As a Product Manager, you can see a list of feedback submissions received from users or customers. You can navigate, sort, filter, group, or link the feedback and prioritize your actions based on their requirements.

You can also create a feedback record and link it with an idea or planning items on this page. For example, you can select multiple feedback records and associate them with an idea, epic, demand, or project.

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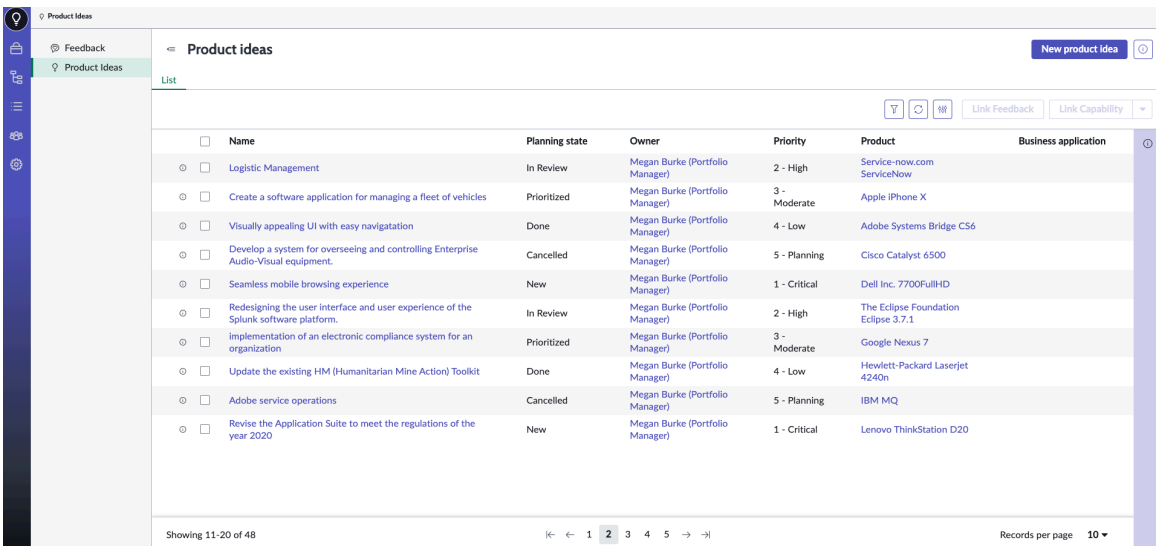
Product idea

A product idea is a solution or improvement that is developed based on one or multiple feedback records, ensuring it benefits all the customers. Assess and prioritize the product idea or link it to another planning item (epic, demand, or project). Manage your product ideas and create a custom lens using the product ideas in Strategic Planning. Get an overview of product ideas, number of product ideas linked to the feedback, latest ideas, and planning state of the ideas. Use the filters at the top of the page to view the product ideas.

Product ideas List view

As a Product Manager, you can see a list of product idea submissions. You can sort ideas based on different attributes like planning state, MoSCoW, priority, and impact. Prioritize product ideas using the MoSCoW values in the list view. The list view displays linked feedback count and number of customers interested in a product idea. The number of customers is calculated or rolled up based on the linked feedback.

Product ideas list



Get started with these tabs to manage feedback or product idea.

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Tabs in Feedback

Tabs	Description	Action
Details	Provides additional information about the feedback that has been submitted.	• View and track the feedback information. • Compose worknotes on the feedback. • Add attachments or files to your feedback record.
Product idea	Enables you to manage the ideas that are linked to a feedback record. These ideas are evaluated, prioritized, and worked on.	• View and track the product ideas that are linked to the feedback record. • Create a product idea and link it with the feedback record. • Unlink the ideas from feedback record.
Planning item	Track work items and ensure that the feedback translates into actionable items.	• View the number of planning items that are linked to the feedback record. • Create a planning item and link it with the feedback record. Monitor the status of planning items and track the overall advancement of planning items. • Unlink the planning items from feedback record.

Tabs in Product idea

Tabs	Description	Action
Details	Detailed view of the product idea record. View the description, attachments, and activity.	• View the description, attachments, activity and access other relevant information associated with the product idea. • Compose worknotes on the product idea. • Add attachments or files to your product idea record.

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Tabs in Product idea (continued)

Tabs	Description	Action
Planning item	Enables you to view the number of planning items linked to the product idea record.	• View the number of planning items that are linked to the product idea record. • Create a planning item and link it with the product idea record. • Unlink the planning items from product idea record.
Goal/Target relationships	Enables you to associate the product idea with specific goals that the idea aims to contribute to.	• Create and add goals to your product idea record. • Remove the goals from your product idea record.
Feedback	Enables you to view and manage the feedback records that are linked to the product idea. This tab displays feedback as cards. Selecting the card opens the feedback record and provides detailed information about the feedback.	• View the associated feedback that are linked to the product idea record. • Select the feedback card to open the detailed information about the feedback. • Sort feedback by status, priority, or other attributes. • Search for feedback by titles, keywords, or content.
Doc	Provides a centralized location for product managers to organize, store, and collaborate on documents related to the product idea or feedback or planning item. This can include detailed requirements, design documents, technical specifications, or any other files.	• Create multiple pages using templates. • Tag or mention specific users within the documentation component. • Mention a record to create a direct link of the record within the documentation component. • Insert table, images, links and so on. • Generate a summary of selected text in Docs using Planning item Gen AI Docs skill. For more information, see Generate the summary for selected or complete

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Tabs in Product idea (continued)

Tabs	Description	Action
		content with Planning item Gen AI Docs skill in Strategic Planning.

Related topics

Feedback reference

Create feedback filters in Strategic Planning

Create and organize feedback using feedback filters and reduce the need to manually apply filters each time to find specific feedback.

Before you begin

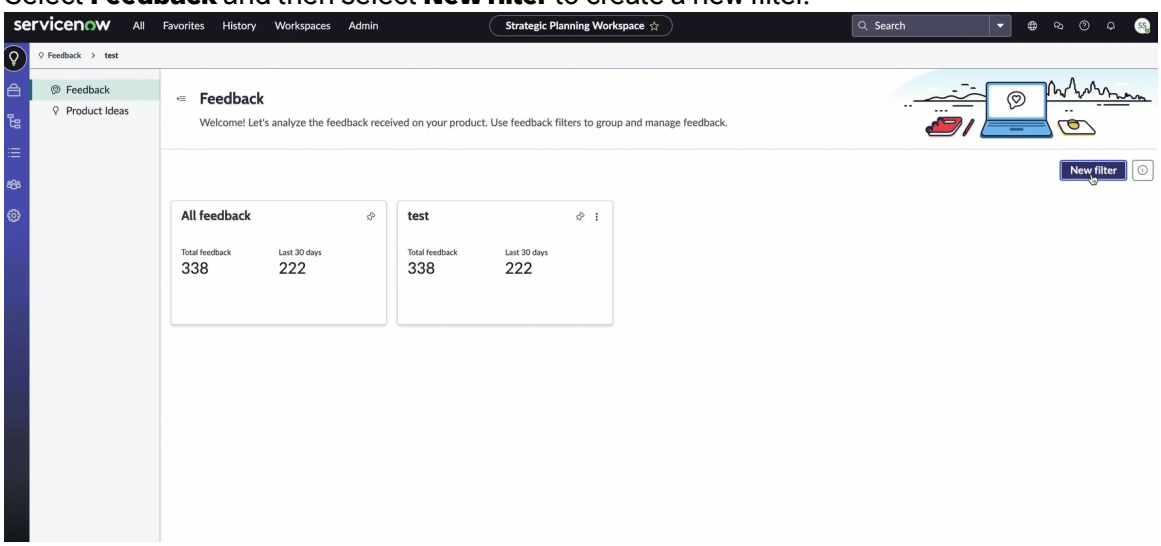
Role required: pf_user

About this task

Project managers can retain the feedback filters, share them with team members or groups, and collaborate on specific feedback filters.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace**.
2. Select **Feedback** and then select **New filter** to create a new filter.



3. On the form, fill in the **Feedback filter name**.
   You can choose the filters or set up new filter condition if needed.
4. Select **Confirm**.

   You can track your feedback filter, review statistics, and sentiments. You can also create new feedback directly from the filter page which is specific to this feedback filter.

   Sort, pin, share, update, or delete the feedback filter card directly from feedback homepage. When sharing the feedback filter card, you can provide access to specific users or groups. You can also see who has access to the feedback filter card.

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What to do next

- Update feedback filters in Strategic Planning
- Create Feedback in Strategic Planning
- Associate feedback with a product idea
- Associate a feedback or product idea with a planning item

Update feedback filters in Strategic Planning

Edit the details of a feedback filters and make real-time updates on your feedback filter.

Before you begin

Role required: pf_user

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** and select **Feedback**.
2. Create a feedback filter.
   For more information, see Create feedback filters in Strategic Planning.
3. From the feedback page, select the feedback filter card that you want to edit.
4. Update the record details or delete the feedback filter card.

Create Feedback in Strategic Planning

Create feedback using the Feedback application and make informed decisions on your product.

Before you begin

Role required: pf_user

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace**.
2. Select **Feedback**.
3. Select **Feedback** and then choose one of these options to create a feedback.

4. On the form, fill in the fields.
   For more information on fields and description, see Feedback form.
5. Select **Submit**.
   You can now track your feedback. Go to the instance and search with the feedback number to open the feedback.

What to do next

- Update Feedback or Product idea records from the list page
- Associate feedback with a product idea
- Associate a feedback or product idea with a planning item

Update Feedback or Product idea records from the list page

Edit the details of a feedback or product idea record and make real-time updates using the list page of feedback or product ideas.

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Before you begin
Role required: pf_user

About this task
Modify feedback or product idea records within the list view or side panel using inline editing. Edit the details inline from the list view or use the side panel. Enable quick updates for fields like short description, state, and others on the list page. You can use the full details page to add work notes, attachments, and view related lists of a feedback or product idea record.

Procedure
1. Navigate to **Workspaces** > **Strategic Planning Workspace**.
2. From the feedback or product idea list, select the feedback or product idea record that you want to edit.

   You can use the full details page to edit the feedback or product idea record. Select  to open the preview of the feedback or product idea record from the list view.
3. Update the record details, attach files, or delete the feedback or product idea record. Information of certain columns that aren't editable in the full details page can't be edited inline either. For example, product ideas count and votes. If you group the feedback or product idea records by any attribute, you can't edit the short description of the items directly from the list view.

Associate feedback with a product idea

Link a feedback record with one or multiple product ideas that can be planned, prioritized, and executed.

Before you begin
Role required: pf_user

Procedure
1. Navigate to **Workspaces** > **Strategic Planning Workspace**.
2. Select **Feedback**.
3. Select **Feedback** and then Create feedback.
4. Once the feedback is created, select **Link Product idea** to link the product idea.
5. **Optional:** From the Product idea list page, select one or multiple product idea records that you want to associate and select **Confirm**.
   You can view associated product ideas from **Product ideas** tab.

Related topics
Associate a feedback or product idea with a planning item

Associate a feedback or a product idea record with a non-planning item

Associate a feedback or product idea with a planning item

Link a feedback or product idea record with a planning item. By doing this association, you can address customer concerns promptly in a central location and ensure that every input is considered when making decisions.

Before you begin
Role required: pf_user or apw_user

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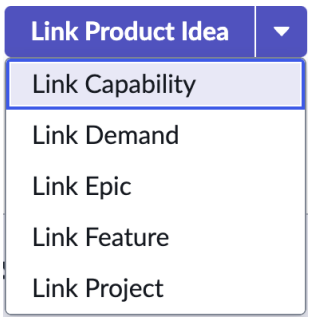
About this task

You can associate a feedback or product idea record with only one planning item at a time. You can link a feedback or product idea record with either a demand, epic, or project.

Note:
When a feedback or product idea record is associated with a planning item (project, demand, or epic), the record appears on the Planning items tab on the feedback or product idea record.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace**.
2. Select **Feedback**.
3. Select **Feedback** and then Create feedback.
4. Once the feedback is created, from the link product idea list, select the planning item to associate with the feedback.



   From the planning item list, select one or multiple records that you want to associate. You can follow similar steps for the product idea.

5. Select **Confirm**.
   You can view associated Planning items from **Planning items** tab. Demands that are in the completed state cannot be associated with a product idea or feedback.

Create a product idea in Strategic Planning

Create a product idea using the Feedback application and prioritize which ideas are important to users. Incorporate product ideas into feedback to enhance your product.

Before you begin

Role required: pf_user

About this task

User-created product ideas help in identifying focus areas of a product. These product ideas facilitate continuous improvement in the product development life cycle.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace**.
2. Select **Feedback**.
3. Select **Product idea** and then select **New product idea**.
4. On the form, fill in the fields.

   For more information on fields and description, see Product idea form.

5. Select **Submit**.

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What to do next

- Update Feedback or Product idea records from the list page
- Associate a product idea with feedback
- Associate a feedback or a product idea record with a non-planning item
- Associate a product idea with a goal

Associate a product idea with feedback

Link a product idea with one or multiple feedback records that can be analyzed, prioritized, and implemented.

Before you begin

Role required: pf_user

Procedure

1. Navigate to **All** > **Workspaces** > **Strategic Planning Workspace**.
2. Select **Feedback**.
3. Select **Product idea** and then Create product idea.
4. From the Product ideas List page, select one or multiple ideas to associate.
5. Select **Link Feedback**.
6. From the Link Feedback list, select one or multiple feedback records and select **Confirm**. You can now track your product idea. Go to the instance and search with the product idea number to open the product idea. You can also create a new feedback record and then associate it with the product idea using the Create new feedback link.

Related topics

Associate a feedback or a product idea record with a non-planning item

Associate a product idea with a goal

Manage documentation in Feedback application

Associate a feedback or a product idea record with a non-planning item

Link a feedback record or product idea record with a non-planning item. By doing this association, you can address customer concerns promptly in a central location and ensure that every input is considered when making decisions.

Before you begin

Ensure to Configure non-planning items for feedback or product ideas records.

Role required: pf_user

About this task

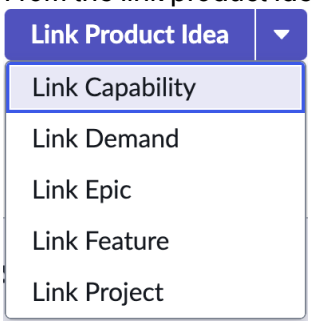
You can associate single or multiple feedback records or product idea records with one or multiple non-planning items at a time. Non-planning items could be an incident, scrum task, agile story or item from any global or scoped application such as agile development, PPM standard or safe application.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace**.
2. Select **Feedback**.

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3. From the feedback list, select one or multiple feedback records that you want to associate with the non-planning item.
   You can follow similar steps for the product idea. From the product idea list, select one or multiple ideas that you want to associate with the non-planning item and follow steps from 2 through 4.
4. From the link product idea list, select the non-planning item.



   The non-planning item is displayed in the link product idea list only if the item is configured. For example, if you have configured an incident, you can see the **Link incident** option in the list.

5. From the non-planning item list, select one or multiple records and select **Confirm**.
   You can now track your feedback or product idea with Related items Tab.

Associate a product idea with a goal

Create a goal relationship by associating one or more product ideas with goals. Focus and target on product ideas by defining specific goals.

Before you begin

Role required: pf_user or apw_user or goal_user

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace**.
2. Select **Feedback**.
3. Select **Product idea** and then Create product idea.
4. From the Product ideas List, select one or multiple ideas to associate.
5. Select **Add**.
6. From the Goal list, select a goal.
   For more information on goals, see Associate a planning item with goals or targets.
7. If you want to set a goal as primary goal, then select the **Primary goal** check box.
   The remaining fields are auto-populated from the goal record.
8. Select **Save**.
   You can now track your goals from the Goal Relationship list.

Manage documentation in Feedback application

Capture documents, files, or resources associated with a product idea in the Doc tab.

Before you begin

Role required: pf_user

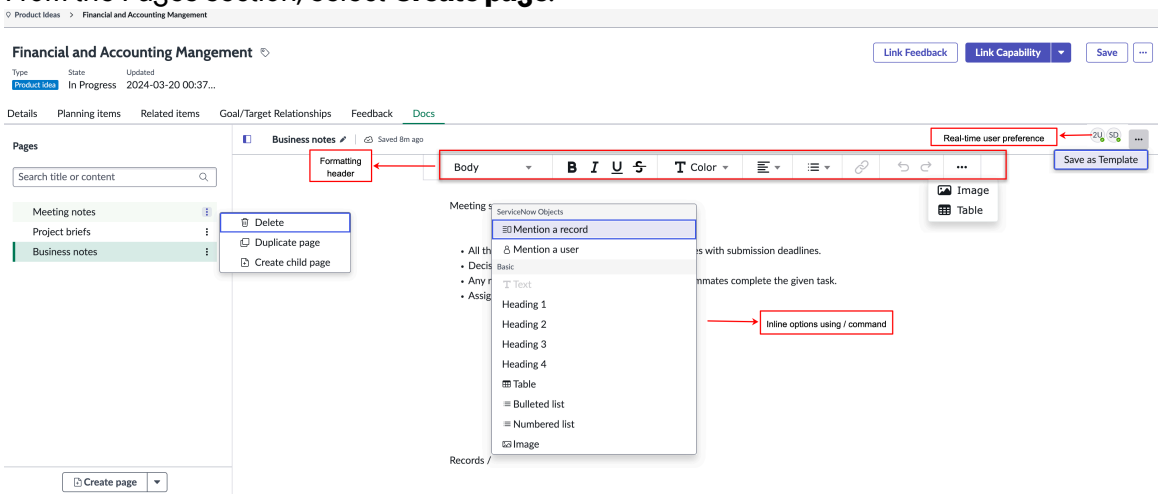
Verify that you have a doc component plug-in (com.sn_docs) installed.

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About this task

Procedure

1. Create a product idea in the Feedback application.
2. From the **Product idea list tab**, select the record to open.
3. From the side panel, open the details of the record by selecting the **Full Details** button.
4. Navigate to the **Docs** tab.
5. From the Pages section, select **Create page**.



You can perform these tasks under the **Doc** tab:

- Select the more actions menu to delete, duplicate, or create child pages in the pages section.
- Use the forward slash on the keyboard to open a list of actions, including **Mention a user** or **Mention a record** as required.
- Customize the appearance of your text using the formatting section.

6. Select **Save as Template** to save your worknotes.

Summarize the feedback by using Now Assist for Strategic Portfolio Management (SPM)

Generate a summary from the name and description of the feedback records so that you can analyze a large volume of feedback quickly without reading each feedback record manually. You can do this task by using the multi feedback summarization skill in the Now Assist for Strategic Portfolio Management (SPM) application.

https://player.vimeo.com/video/1016235687?h=c41764ac08&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

Role required: pf_user

About this task

With the feedback or multi feedback summarization skill, you can get enough details about the feedback that you received on your product so that you can improve the product features, usability, and performance.

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Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** and select **Feedback**.
2. From the Feedback page, select any feedback filter card.
3. From the feedback list, select one or multiple feedback records.

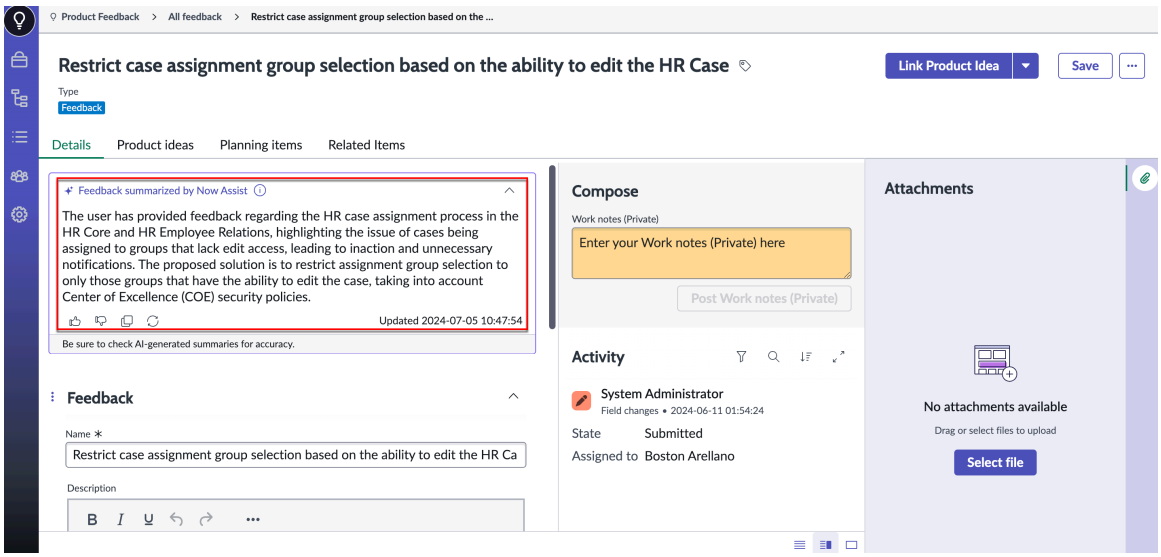
   View a loader for the side panel while the summary content loads for a more engaging loading experience.

   If you want to generate a summary for one feedback record, you can either generate it from the list level or at the record level. At the record level, the feedback summary is displayed in the Now Assist component. The component is collapsed by default and expands to display the summary.

4. Select **Summarize**.

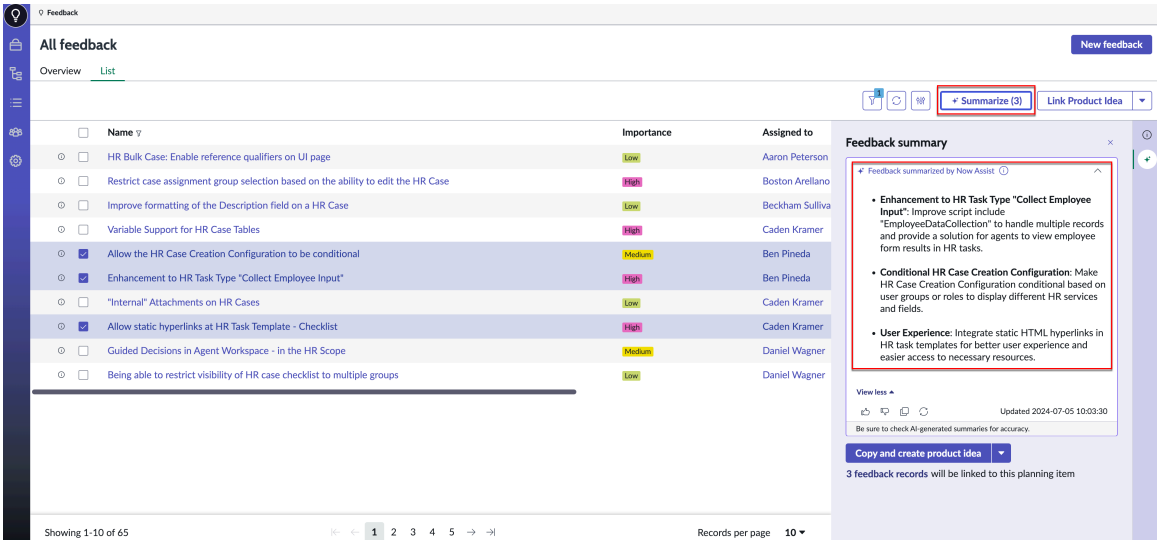
   View an animation for the Now assist icon when you hover over it.

   You can generate a summary of a single feedback record by using the feedback summarization skill. This image shows the AI-generated summary for a single feedback record.



You can use the multi feedback summarization skill to generate summaries of one or multiple feedback records. For example, you can analyze the high-priority feedback, filter them, summarize the records, and gain insights into the requirements.

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Note:
Because the information in these fields is automatically generated, it's a good idea to review the text and make sure it's accurate.

The feedback or multi feedback summarization skill uses the name and description information of the feedback record to generate a paragraph or bullet-point summary from the feedback.

View the hover animation for the Now Assist icon on the Summarize button in the feedback list and Docs.

5. **Optional:** When you're finished summarizing the feedback, you can expand or collapse the summary, provide feedback, copy it, or view information about it.

   Note:
   The feedback summarization or multi summarization skill checks the feedback records to determine if enough information is available to generate a summary. If there isn't enough feedback content to summarize, you can add more content and retry.

   On the side panel, you can select the preview record icon ( ) to view the additional details or select preview generated summary icon ( ) to view the summarization output.

6. **Optional:** Select **Copy and create epic** to copy the generated summary and create a planning item.

   (Optional) Save time and streamline your work flow by linking the feedback with planning items, which eliminates the need to copy summaries. You can quickly create work items in Feedback and view them in the roadmap.

Generate the summary for selected or complete content with Planning item Gen AI Docs skill in Strategic Planning

Quickly learn the details of the documents from the summary that is generated by Now Assist in Strategic Planning.

Before you begin

Ensure that the Planning item Gen AI Docs skill is activated.

Role required: pf_user, pf_read, apw_user, or apw_read.

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About this task

Minimize the time that you spend reading documents, meeting notes, project reports and so on by using a summary that is generated by Now Assist. You can also copy-and-paste the source materials that meet your learning needs in Docs and generate a quick summary.

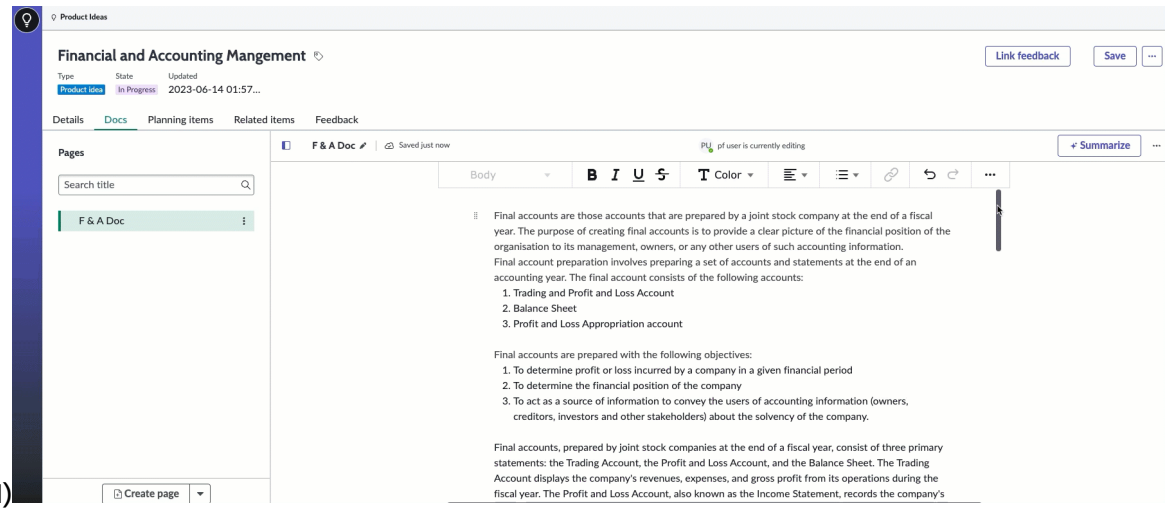
Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** and open any planning item records such as product idea from Feedback.
2. From the **Docs** tab, perform one of these actions according to your requirements.

   Note:
   Summarization of the entire content is also permitted for users with the read role.

3. **Optional:** When you're finished summarizing the content in Docs, you can provide feedback, copy, or view information about it.

(Optional)



Note:
Because the information in these fields is AI generated, it's a good idea to review the text and make sure it's accurate.

Only an administrator can activate the Now Assist skills. For more information, see Configure Now Assist for Strategic Portfolio Management (SPM).

The Planning item doc summarization skill checks the doc content to determine if enough information is available to generate a summary. If there isn't enough content to summarize, you can add more content and retry.

Note:
The **Summarize** button is visible only if the Planning item doc summarization skill is active. If the selected text exceeds the token limit for Now Assist, the Planning item doc summarization skill can't be executed. If there is more content to summarize, you can remove some content and retry.

Feedback reference

Reference information to provide additional details about Feedback such as the fields, user roles, tables, and system properties information.

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Components installed with Feedback application

Learn about several types of components installed with Feedback application in Strategic Planning such as user roles, tables, and, system properties.

Note:
The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Roles installed

Role title [name]	Description	Contains role
[sn_align_core.pf_read]	Can view the Feedback.	None
[sn_apw_advanced.pf_user]	Create, view, update, and delete the Feedback entities.	• pf_read • pf_basic
[sn_align_core.pf_basic]	Create, view, update, and delete the Feedback but cannot access the Feedback from Strategic Planning Workspace.	None

Tables installed

Table	Description
Feedback [sn_align_core_feedback]	Stores all the information about Feedback received from different sources.
Product idea [sn_align_core_product_idea]	Stores all the information about product ideas.
Feedback relationship [sn_align_core_m2m_feedback_rel]	Stores information about the feedback associated to an entity (planning or non-planning items).

System properties installed

Name	Description
sn_apw_advanced.feedback.idea_feedback_queue_address	Specifies the address for creating or submitting the feedback. With the `sn_apw_advanced.feedback.idea_feedback_queu` system property, you can configure email settings within your instance and submit feedback directly from your email account.

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Name	Description
sn_apw_advanced.product_feedback_allowed_non_planning_items	Specifies the non-planning items that can be linked to feedback or product idea. With the *sn_apw_advanced.product_feedback_allowed_no* system property, you can link non-planning items such as incident, scrum tasks, agile stories, or items from safe application, agile development, PPM standard, or any global or scoped application tables to your feedback or product idea.
sn_apw_advanced.product_feedback_feedback_filters	Specifies filters to sort through feedback information. With the *sn_apw_advanced.product_feedback_feedback_f* system property, you can configure to add and remove the filters on the feedback overview page.
sn_apw_advanced.product_feedback_product_idea_filters	Specifies filters to sort through product idea information. With the *sn_apw_advanced.product_feedback_product_id* system property, you can configure to add or remove the filters on the product idea overview page.
sn_apw_advanced.pf_docs_config	With the *sn_apw_advanced.pf_docs_config*, you can customize the Doc component using different attributes. • Type: string • Possible value: JSON with key-value pair with these attributes: `{ "hideLeftPanel": true/false, "hideDocTitle": false, "hideFavorites": false, "collapseLeftPanel": false, "collapseRigthPanel": false, "allowExternalLink": false, "implicitSave": true, "recordMentionEnabled": true, "userMentionEnabled": true, "recordMentionConfig": [{ (Record mention configuration) "sourceTable": TABLE_NAME, "filterCondition": "", "label": TABLE_LABEL,`

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Name	Description

	<pre>"fields": [
	FIELD1_NAME,
	FIELD2_NAME
	]
	}],
	}</pre>
	• Location: System Property [sys_properties] table

sn_align_ws.pf_max_list_items	Specifies the maximum number of records displayed in the feedback or product idea list view. With the *sn_align_ws.pf_max_list_items*, you can customize the feedback or product idea list view by setting a limit for the number of records displayed. • Type: integer • Possible value: Any integer number greater than zero. • Location: System Property [sys_properties] table

For more information on components installed with Strategic Planning, see Components installed with Strategic Planning Workspace.

Form field information for Feedback application

Field information for forms used in the Feedback application.

Product idea form

Learn about the fields of the Product idea form. Use this form to create or edit the details of a product idea in Strategic Planning.

Details tab of the Product idea form

Field	Description
Name	Brief description of the product idea.
Description	Detailed description of the product idea.
Planning state	State of the product idea. The available options are: • New • In Review • Prioritized • Done • Cancelled

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Details tab of the Product idea form (continued)

Field	Description
Owner	User assigned to this product idea.
MoSCoW	Priority of the product idea is based on its importance. The available options are: • Must have • Should have • Could have • Won't have
Created by	User who created this product idea.
Product	Product associated with the product idea.
Customers	Customers who have shown interest in the product idea. This field is automatically set based on the linked feedback.
Locations	Location impacted by the product idea.
Department	Department associated with the product idea.
Strategic program	Strategic program associated with the product idea.
Work notes	Notes for adding and tracking the activity of the product idea.

Dates section of the Product idea form

Field	Description
Approved start date	Approved start date for this product idea.
Approved end date	Approved end date for this product idea.

Details section of the Product idea form

Field	Description
Priority	Priority of this product idea.

The following is the list of related tabs:

- Planning items tab: Displays all the planning items that are linked with the product idea record. For more information, see Associate a feedback or product idea with a planning item.
- Goal Relationships tab: Displays all the goals that are linked with the product idea record. For more information, see Associate a product idea with a goal.
- Feedback tab: Displays all the feedback records that are linked with the product idea record. For more information, see Associate a product idea with feedback.

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- Docs tab: Displays documents or information related to the product idea record. For more information, see Manage documentation in Feedback application.
- Related items tab: Displays all the non-planning items that are linked with the product idea record. This tab is only available if the non-planning items are linked. For more information, see Associate a feedback or a product idea record with a non-planning item.

Related topics

Create a product idea in Strategic Planning

Feedback form

Feedback form

Learn about the fields of the feedback form. Use this form to create or edit the details of a feedback record in Feedback.

Note:
ESG Workspace and Strategic Planning users can't view the fields that aren't added to the default/custom form layout in the workspace. Configure the default/custom form layout to view those fields. For information on how to configure the form layout, see Configuring the form layout.

Details tab of the Feedback form

Field	Description
Name	A brief description of the feedback.
Description	Detailed description of the feedback.
Product idea count	Number of product ideas associated with the feedback.
State	Current state of the feedback. The available options are: • Submitted • Need more information • Under review • In backlog • Planned • In development • Completed • Unlikely to implement • Duplicate • Already exists
Assigned to	User who is assigned to the feedback.
Source	Source of the feedback. The available options are: • Chat • Customer meeting

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Details tab of the Feedback form (continued)

Field	Description
	• Email • Social media • Idea portal
Type	Type of the feedback. The available options are: • Issue • Enhancement request • Insight
Product	Product associated with the feedback.
Customer	The customer who submitted the feedback.
Sentiment	Sentiment of the feedback record. The available options are: Positive, Negative, or Neutral.
Created by	User who created the feedback record.
Business application	Business application that this feedback is related to.

The following is the list of related tabs:

- Product ideas tab: Displays all the ideas that are linked with the feedback record. For more information, see Associate feedback with a product idea.
- Planning items tab: Displays all the planning items that are linked with the feedback record. For more information, see Associate a feedback or product idea with a planning item.
- Related items tab: Displays all the non-planning items that are linked with the feedback record. This tab is only available if the non-planning items are linked. For more information, see Associate a feedback or a product idea record with a non-planning item.

Related topics

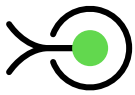
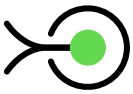
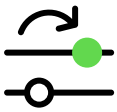
Create Feedback in Strategic Planning

Portfolio Planning in Strategic Planning

Portfolio Planning in Strategic Planning Workspace helps product and portfolio managers align work with strategy across the organization, while facilitating Agile transformation by combining traditional and agile work streams.

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Get started

Explore  Learn the key features and business value of Portfolio Planning in Strategic Planning	Configure  Set up the core configuration	Use  Plan, fund, and align work across your company
Goals  Create goals, set targets, and evaluate the progress	Prioritize  Rank and prioritize work for your portfolio plans	Roadmap  Roadmap work for your portfolio plan
Report  Export portfolio plan status report as a PPT	Integrate  Integrate Strategic Planning with execution systems	Reference  Get details about components, form fields, and general guidelines

Troubleshoot and get help

- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Portfolio Planning in Strategic Planning Workspace

Learn about the features, functionality, and the business value that Strategic Planning provides.

Strategic Planning overview

Strategic Planning uses Lenses to help you plan work for your company in a delivery perspective of your choice. Personalized portfolio plans that are created using a lens help you cascade the plans from the enterprise level down through portfolios and products or align work with an

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organizational goal or a value stream. Prioritize and roadmap relevant work, thus aligning the right execution teams to the right strategy.

After strategic plans are broken down into planning items such as projects or epics, you can schedule these items into your product or portfolio roadmaps. Using hybrid roadmaps, you can roll up both Waterfall and Agile work items to a shared initiative. You can also plan capacity and financials for each of these planning items all from a single workspace.

From the following table, learn about features of Strategic Planning in detail and how they enable managers to draw effective plans and drive agile transformation across the company.

Features and Benefits

Feature	Benefit
Lens	Choose a planning perspective to prioritize, fund, and align your work.
Lens configuration	Use six predefined lenses or create custom lenses.
Portfolio plans	Enable focused planning of work in the desired lens to align with strategy and drive shared outcomes.
High-level portfolio plans	Prioritize and roadmap work at a high-level by building portfolio plans for strategic items such as initiatives.
Planning items	Plan work in the form of projects, epics, demands, or a custom type to suit traditional, Agile, or hybrid approaches.
Prioritization	Facilitate smoother backlog grooming and prioritize the right work using List, Kanban, and Hierarchy views.
Portfolio roadmaps	Visualize the prioritized work into roadmaps and set milestones to track key outcomes.
Free-form roadmaps	Flexibly plan and track work across the company, without restricting to a planning organization or portfolio.
Scenario planning	Optimize your portfolio planning by comparing potential outcomes, assessing their alignment with strategic goals, and approving the best scenario as your live plan.
Scoring	Start scoring items in your portfolio plan to prioritize work based on a pre-defined or a custom score.
Goal management	Create goals for portfolio plans, set targets for them, and evaluate the progress of the goals

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Feature	Benefit
	and targets to accomplish your organizational plans and drive business outcomes.
Diagnostics	Identify and fix errors in the configuration and other common settings.
Capacity Planning	Generate, view, and better plan the resource capacity for your prioritized planning items.
Financial planning	View the financial planning of your planning items using the comprehensive view in the new Financials screen.

Comparing Portfolio Planning Workspace with Strategic Planning Workspace

- Portfolio Planning Workspace: Prioritize, roadmap, and track work when using waterfall methodology. Enhance traditional portfolio planning for demand and project management. To learn more about Portfolio Planning, see Portfolio Planning.
- Strategic Planning Workspace: Prioritize, roadmap, and track work when using traditional, agile, or hybrid methodologies. Align strategy to execution by defining and tracking goals across the organization.

Feature	Portfolio Planning Workspace	Strategic Planning Workspace
Pre-defined lens: Project Portfolio	✓	✓
Pre-defined lens: Organization	✓	✓
Pre-defined lens: Project Program	✓	✓
Pre-defined lens: Product	✗	✓
Pre-defined lens: Strategic Investments	✗	✓
Pre-defined lens: Goals	✗	✓
Pre-defined lens: Value Stream	✗	✓
Pre-defined lens: Business Capability	✗	✓
Lens configuration: Modify existing lens	✓	✓
Lens configuration: Create new lens	✗	✓
Portfolio plans: Create and share	✓	✓
Planning items: Supported planning items	Project, Demand	Project, Demand, Epic, Custom

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Feature	Portfolio Planning Workspace	Strategic Planning Workspace
Supported items for high-level planning	Program (pm_program)	Strategic Program, Initiative, Custom
Planning items: Custom planning item tables	✗	Five predefined tables
Prioritization: List	✓	✓
Prioritization: Hierarchy	✓	✓
Prioritization: Kanban	✗	✓
Roadmaps: Timeline	✓	✓
Roadmaps: Kanban	✗	✓
Scenario planning	✓	✓
Scoring	✗	✓
Goals	✗	✓
Product Feedback	✗	✓
Capacity planning	✓	✓
Financials	✓	✓
Create and share free-form roadmaps	Project, Demand, and Program tables	Any ServiceNow® platform entity
Enterprise Agile Planning	✗	✓
Dashboards	✓	✓

Lenses in Strategic Planning

Lenses represent planning perspectives, which would be different for planning managers at different levels in an organization. Lenses enable you to create personalized portfolio plans through which you prioritize and align work with high-level initiatives and goals.

Lenses overview

Lenses in Strategic Planning indicate a perspective in which you can plan and fund work. By selecting a lens, you choose a planning perspective to prioritize and align your work in. For example, if you're a department leader, you can choose the Organization lens. If you're a product manager, you can choose the Product lens.

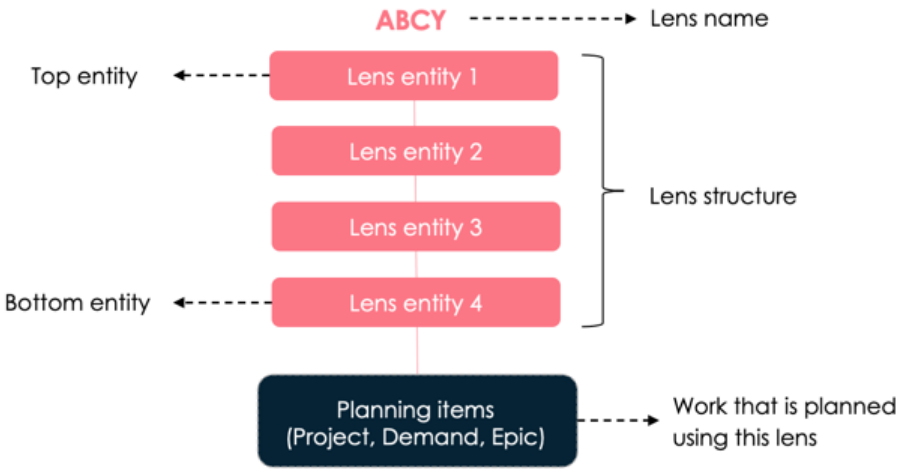
Lens structure

Each lens in Strategic Planning consists of a structure that is made up of entities. Lens entities represent different levels of planning for your company. You can build portfolio plans at one of these levels.

The planning item types associated with the bottom entity of a lens represent the type of work that can be planned using these portfolio plans.

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Sample lens structure



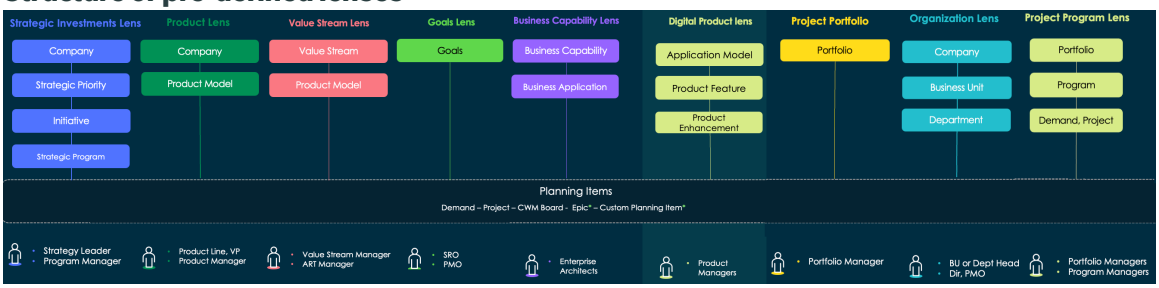
For example, the Organization lens has a Company, Business Unit, and Department as its entities. As the head of the Support department, you can create a portfolio plan at the department level. Then, you can prioritize the work that is assigned to the department and plan a roadmap for the prioritized work. This work can be in the form of epics, projects, demands, or any other custom type.

Get started with one of the pre-defined lenses, or build a custom lens structure, with up to six levels, to suit your planning needs.

Pre-defined lenses and their structure

Strategic Planning provides nine pre-defined lenses to get you started with building your portfolio plans - Project Portfolio, Project Program, Organization, Strategic Investments, Product, Digital Product, Value Stream, Goals, and Business Capability. Planning managers can use these lenses based on their role at the company.

Structure of pre-defined lenses



Lens	Planning levels (Lens entities)	Planning manager	Description
Organization	• Company • Business unit • Department	• Department head • Business unit head	Plan and track the delivery of work in my organization and visualize how the work is aligned to various levels.

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Lens	Planning levels (Lens entities)	Planning manager	Description
Product	• Company • Product models	• Product leader • Product manager	Plan, fund, and prioritize work from a product lens.
Digital Product	• Application Model • Product Feature • Product Enhancement	• Product leader • Product manager	Plan, prioritize, and roadmap work for digital products. If the ServiceNow® Digital Product Release Workspace is installed, the planning items associated with the product enhancement appear in the **Planning items** tab of the Release scope page in Digital Product Release Workspace. For details, see Scope of a release.
Strategic Investments	• Company • Strategic priority • Initiative • Strategic program	• Strategy leader • EPMO	Plan, manage, and provide oversight for strategic initiatives or programs regardless of who is doing the work.
Goals	Goal	• Portfolio manager • Business unit head	• Create, share, and collaborate on a portfolio plan for defined goals. • Set targets for the goals to track their progress. • Align, prioritize, and roadmap the work you must do to achieve them.
Value stream	• Product model • Value Stream	• Value stream manager • ART manager	Plan, fund, and prioritize work for a value stream.

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Lens	Planning levels (Lens entities)	Planning manager	Description
Project Portfolio	Portfolio	• Product manager • Portfolio manager	Plan, fund, and prioritize work in your project portfolios.
Business Capability	• Business capability • Business application	Enterprise architect	Plan, prioritize, and roadmap the work based on your business capabilities or business applications. This lens can be used only if the ServiceNow® Enterprise Architecture Workspace is installed.
Project Program	• Portfolio • Program	• Portfolio manager • Program manager	Plan, prioritize, and roadmap the work in your programs.

- If you're an admin, you can modify the structure for these pre-defined lenses or configure a new lens altogether based on your planning manager's requirements. For more information, see Lens configuration in Strategic Planning.
- If you're a planning manager, learn about portfolio plans to start aligning your work with the business strategy. See Portfolio plans in Strategic Planning.

Portfolio plans in Strategic Planning

Personalized portfolio plans help you align work with your company's objectives and roadmap the right work for the right time. Drive shared strategy using planning insights from portfolio plans and improve enterprise planning.

Portfolio plans overview

Portfolio plans are custom plans per planning manager that are built using a lens. They enable planning managers to define goals, set targets for these goals, and then roadmap the work to ensure alignment between goals and the planned work.

A strategy leader using the Strategic Investment lens plans in the perspective of initiatives, and a department head using the Organization lens plans in the perspective of a department.

As a planning manager, you can create multiple portfolio plans using different lenses. Visualize the plans and progress of work from different perspectives and share them with stakeholders.

Using portfolio plans, you can:

- Enable focused planning of work in the desired perspective (lens).
- Prioritize the right work and improve alignment with business strategy.
- Reduce the time spent on aligning execution teams to the right work.

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High-level planning using portfolio plans

In Strategic Planning, you can roadmap work for your organization at a high level by building portfolio plans for strategic items such as initiatives. High-level planning items usually span across multiple business units, departments, or portfolios of a company. These strategic work items help you further breakdown a company's priorities.

- Initiative: Used to achieve long-term goals. Initiatives are designed to create a sustainable competitive advantage for the organization. They often involve large-scale effort that requires coordination and collaboration across multiple departments or business units.
- Strategic Program: Used to achieve specific milestones and outcomes of an Initiative.
- Program (pm_program): Used to achieve milestones and outcomes of a program.
- Product Enhancement: Used to plan and achieve feature enhancements for digital products.

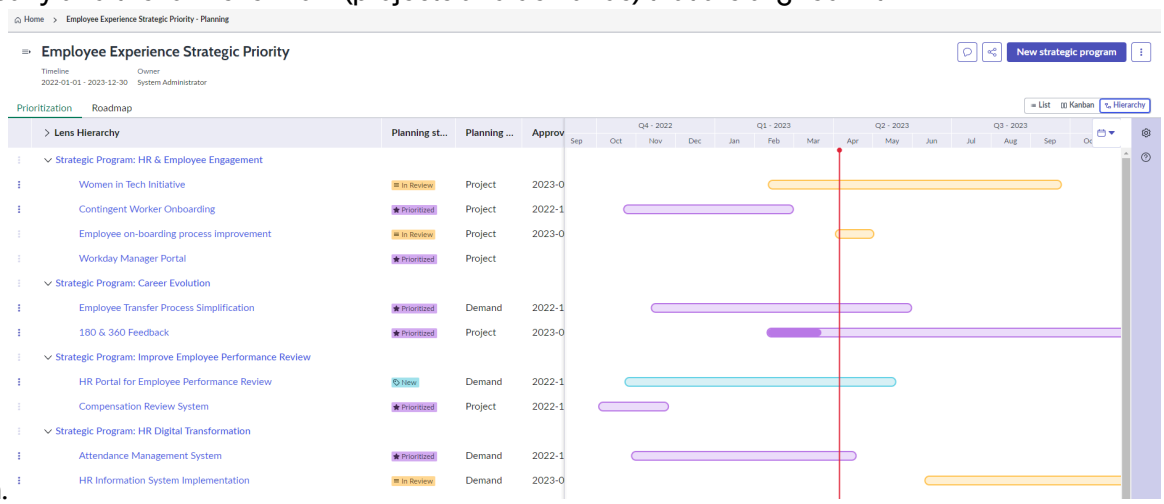
Using the Hierarchy view, review the work pipeline and drill down to the low level planning items that are associated to your strategic item.

For example, as an EPMO, you can view the epics associated to each initiative. Also, you can view and manage the goals that these initiatives are aligned to.

By default, you can use Initiatives or Strategic Programs from the Strategic Investments lens or Programs (pm_program) from the Project Program lens to create high-level portfolio plans. See Create a high-level portfolio plan.

If you need high-level planning enabled for items other than Initiatives, Strategic Programs, Programs (pm_program), work with your ServiceNow admin to complete the additional configuration. See High-level planning configuration in Strategic Planning.

Here's a sample portfolio plan that shows a few strategic programs of the company and the low-level work (projects and demands) that are aligned with them.



Work with your administrator to ensure the required lens setup. See Lens configuration in Strategic Planning.

Start creating portfolio plans to align work with strategy. See Managing portfolio plans in Strategic Planning Workspace.

Scoring in Strategic Planning

Scoring enables you to prioritize items, such as epics, projects, demands, initiatives, strategic programs, and other planning items, based on a defined quantitative metric.

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Before selecting a scoring framework for your portfolio plan, it's helpful to first learn about the pre-defined frameworks available for you to use. Later you can choose if you want to use one of the pre-defined scoring frameworks, or create a custom scoring framework, based on your preferred scoring parameters.

The following are the three pre-defined scoring frameworks available to use for your portfolio plan:

RICE

A framework to prioritize and evaluate items by scoring each criterion. It helps teams assess and compare items based on four key criteria: Reach, Impact, Confidence, and Effort.

Parameters:

- Reach- Indicates the number of people or users who will be affected by the project or feature. It's essential to estimate the potential audience that the item can reach. For example, if a new feature is likely to be used by a small subset of users, it might have a lower reach score compared to a feature that will be utilized by a large portion of the user base.

  To populate this value, answer the question- How many existing/target users within a given period of time?

- Impact- Measures the potential impact or benefit that the item will bring to the users or the organization. This criterion focuses on the positive outcomes and value that the project can deliver.

  To populate this value, answer the question- How much will this impact individual users?

- Confidence- Confidence gauges the level of certainty that the project will achieve its intended results. This criterion assesses how confident the team is in their estimates of reach and impact. Items with higher confidence are generally based on solid data, user feedback, or previous experiences, making it more likely for them to deliver the expected results.

  To populate this value, answer the question- How confident are you about the impact and reach scores?

- Effort- Duration in person months, based on product, design, and development effort. This criterion helps teams understand the relative difficulty of executing. Items with higher effort scores may require more development time, financial investment, or significant changes to existing systems.

  To populate this value, answer the question- How much time will this item require in person months?

The RICE score is calculated with this formula:

```
RICE Score = (Reach x Impact x Confidence)/Effort
```

Value vs Effort

A framework to prioritize planning items, based on the effort estimate and the value it brings to the users/customers. The Value vs. Effort method is the quickest way to prioritize your backlog items.

Parameters:

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- Value- Significance of items based on the potential revenue, user benefit, business impact, and strategic goals.

  To populate this value, answer the question- How does this contribute to your goal?

- Effort- Duration to build the product, including product, design, and development estimates.

  To populate this value, answer the question- How difficult it is to deliver the task?

The Value vs. Effort score is calculated with this formula:

```
Value vs. Effort Score = Value/Effort
```

WSJF

A framework to sequence items for maximum benefit, particularly useful where frequent re-prioritization is a driver of economic value. This score is based on the relative cost of delay and relative job duration, business value, time criticality, risk reduction, and job size.

Parameters:

- User Business value- The relative importance to the users/customers and its potential impact on revenue.

  To populate this value, answer the question- How important is this item to your business?

- Time Criticality- Identifies how the user business value will decay over time and denotes the urgency to release the item/feature.

  To populate this value, answer the question- How does the item value decay over time?

- Risk Reduction- Identifies the items that can reduce technological and business risks and enable new opportunities.

  To populate this value, answer the question- What else does the item do for your business?

- Job Size- Relative duration to complete the task.
- To populate this value, answer the question- When will you complete the task?

The WSJF score is calculated with this formula:

```
WSJF Score = (User Business value + Time criticality +
 Risk reduction)/Job Size
```

To get started with Scoring your planning items in Strategic Planning, see Scoring planning items in Strategic Planning Workspace.

Related topics

Custom scoring frameworks in Strategic Planning

Goal management in Strategic Planning

Create goals for your portfolio plan, set targets for them, and evaluate the progress of these goals and targets to accomplish your organizational plans and drive business outcomes.

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Goal management key components:

- Goals: Objectives that you want to reach based on your strategic plans.
- Targets: Targets for goals to track and measure the progress of the goals.
- Target source: A configuration for a target to auto-update the actual value of the target.

Goals

Goals refer to objectives that an organization sets for itself to accomplish their organizational plans. Goals are typically qualitative by nature. Goals should be ambitious and are expected to motivate and challenge your teams. Some examples of goals are as follows:

- Using renewable energy by the end of the year 2022.
- Increase diversity in the workplace by 50 percent.

A goal can also have subgoals. You can associate work (planning items) to a goal so that you can track who is responsible for fulfilling the goal.

You can associate planning items - Demand, Project, and Epic, and strategic items - Program and Initiative - with a goal to capture the work being done to meet your goal.

Targets

Targets help you measure your goal. For example, to meet the goal of increasing diversity in the workplace by 50 percent, the target can be to hire a 30 percent diverse workforce by the first quarter of 2022.

Targets can be quantitative or qualitative, by defining the unit of measure for the target. Quantitative targets are numbers-based, countable, and measurable. Qualitative targets are interpretation-based, descriptive, and typically a yes or no type.

You can also break down a target into smaller periods (for example, Quarterly), which helps you set a target for each quarter and focus on the specific breakdown targets. The target breakdowns are automatically created based on the breakdown interval set for the target. For details on how the target breakdowns feature works, see Target breakdowns in Strategic Planning.

Qualitative targets

Qualitative targets are typically non-measurable but can be tracked if the target has been achieved. The available unit of measure for qualitative targets is Yes/No. You can also define a custom unit of measure (for the available choice set) for qualitative targets according to your need and set qualitative targets for your goals.

For example, to achieve a target of conducting a hackathon in Q2-2023, the target can be set as conduct a hackathon in Q2-2023 with the unit of measure Yes/No. The base and target value of the target can be No and Yes, respectively. After the target is successful with the hackathon event, the target value can be updated to Yes.

Target sources

A target source is a configuration for a target to auto-update the actual value of the target, so that the progress of the target and its goal are auto-updated. Any table or a combination of tables (for example, benefit plans, cost plans, surveys, incidents, and PA indicators) present on the ServiceNow AI Platform® can be configured as a target source.

The following target source types are supported for automating the actual value of a target:

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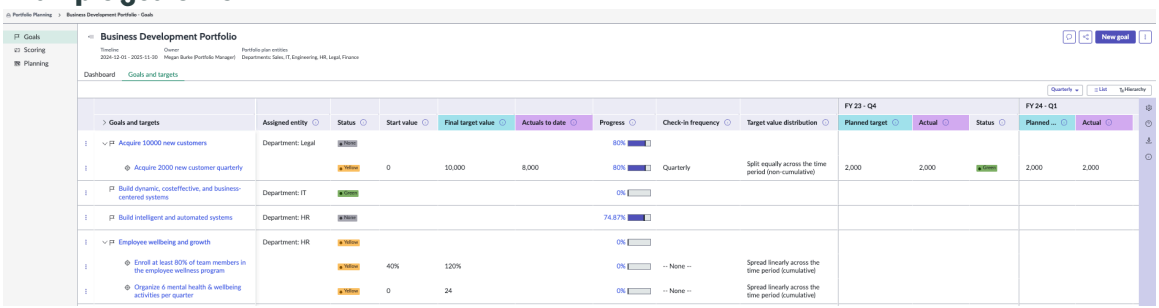
- PA Indicator: Updates the **Actual to date** field on the target form by fetching the required data from the PA Indicator.
- Assessment/Survey: Updates the **Actual to date** field on the target form by fetching the required data from the Assessment metric type and Assessment metric category records.
- Custom script: The Custom script fetches the required data from any ServiceNow AI Platform table that is configured. With the Custom script option, any table or a combination of tables present on the ServiceNow AI Platform can be configured as a target source.

  Predefined target automation script for benefit plans: The predefined, default script is a target source that updates the **Actual to date** field on the target form by fetching the value from the **Actual benefit** field or **Non-monetary actual benefit** field from the monetary or non-monetary benefit plans of relevant work items.

  Context variable

  The context variable is an additional configuration for the target source. The context variable provides information that can be used on the Target form to fetch the required data and update the **Actual to date** field on the Target form. The context variable is required for target source types Assessment/Survey and PA Indicator. If the Goal Framework for SPM scope is selected while creating a target source, the context variable is automatically created for the target source (of type Assessment/Survey and PA Indicator). For more information on context variables, see Context variable in target source.

Example goals view



Goal management workflow in Strategic Planning

Using the Goals view in the Strategic Planning Workspace, you can do the following activities:

- Create a goal for an entity such as company, business unit, department, and so on. For more information, see Create a goal in Strategic Planning.
- Set targets and automate the actual value of the targets. For more information, see Create targets for a goal in Strategic Planning.

  Note:
  Automating the actual value of the targets is optional. If you don't want to automate the actual value of your targets, you can still update the actual value of the targets manually.

- Associate a planning item with goals. For more information, see Associate a planning item with goals or targets.
- Associate or update the primary goal for a planning item. For more information, see Associate or update the primary goal or target for a planning item.

For more information on how to define and manage your goals in Strategic Planning see Managing goals in Strategic Planning Workspace.

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Prioritization in Strategic Planning

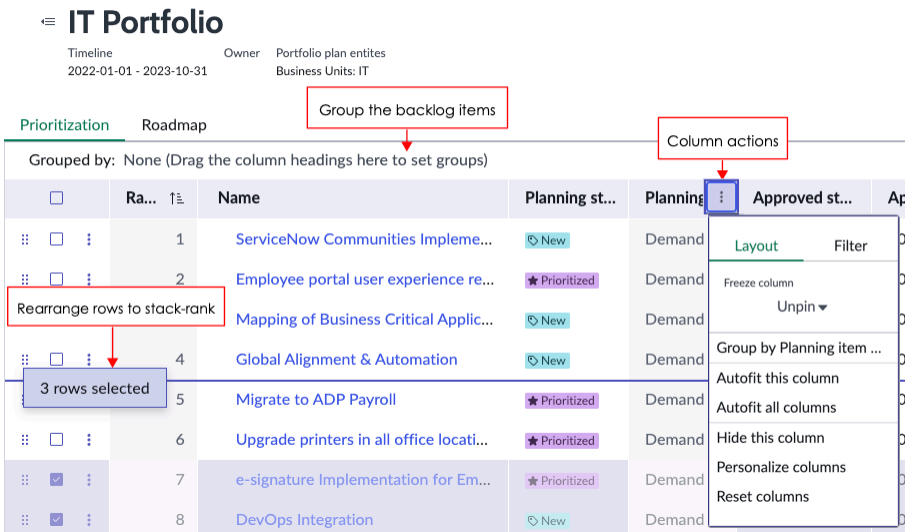
Prioritize work that is relevant for your portfolio using a centralized workspace in Strategic Planning. Review and determine the right work to invest in.

Before scheduling the roadmap for your portfolio plan, it's helpful to first know the existing and upcoming workload. Having all the work items listed at one place helps you understand the overall work pipeline. The consolidated view enables smoother backlog grooming so that you easily review and decide which items must be prioritized.

Using the Prioritization tab in the workspace, you can review all the new and existing work for your portfolio plan, representing its backlog. To help you review the workload efficiently, Prioritization provides information for each work item such as the associated goal, planned costs, and planned benefits. Using these data points, you can stack-rank the items and decide which items are to be prioritized over the others. The Prioritization tab provides the following views to review and manage your backlog.

List view

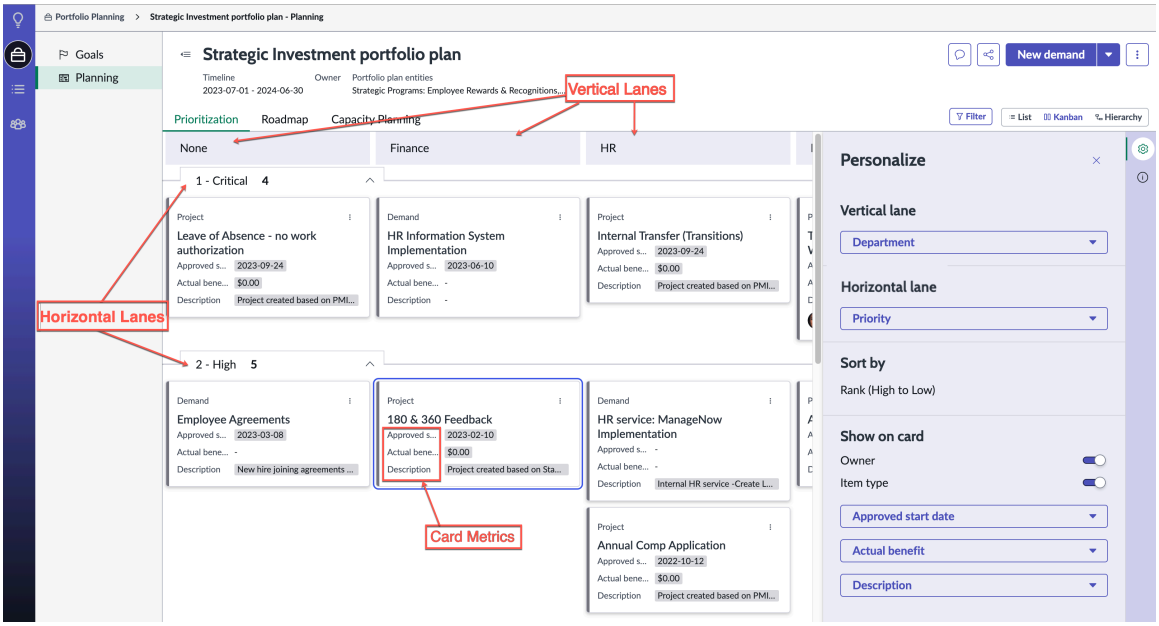
Planning items are listed in a grid format. You can stack-rank the items, group them by a desired attribute, and sort them based on their priority by using the drag functionality.



Kanban view

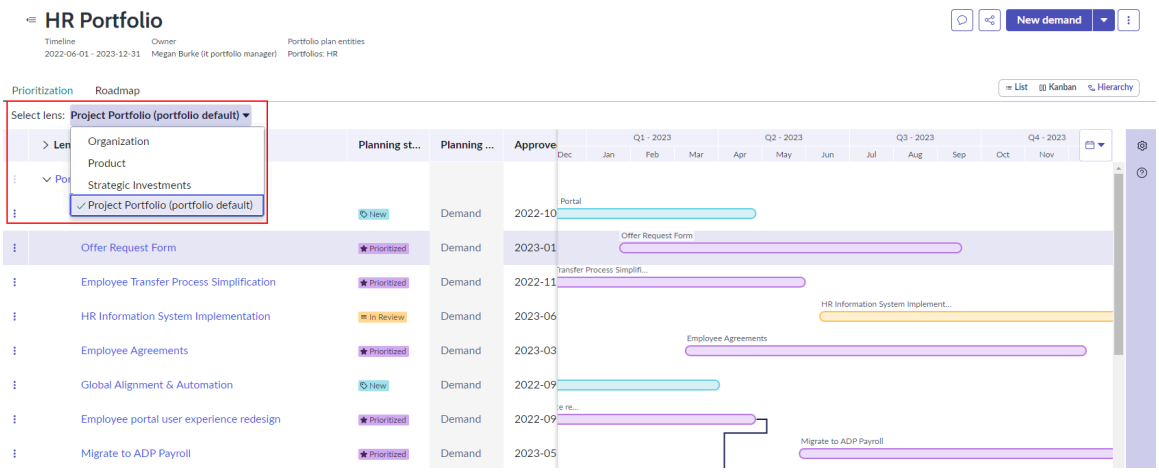
Planning items are displayed in a Kanban board. Portfolio managers can visualize and adjust items in vertical lanes and horizontal lanes. Using the Personalize settings, you can choose to modify the attributes by which you want to view your vertical lanes and the horizontal lanes. For example, you can view the records grouped by planning state and priority, by simply changing the values of the vertical lanes and horizontal lanes. You can also choose not to have any horizontal lane value, by selecting **None** from the drop-down list. The data displayed on the cards can be modified using the side panel. With this feature, you will be able to prioritize more effectively and view just the required details on the cards. Also, click the card to open a side panel with details, to edit the planning item details on the same page.

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Hierarchy view

This view displays how work in the current portfolio plan is aligned with respect to entities of other lenses. Using the lens switcher, you can change the perspective in which you view the alignment of the work. Using the timeline section of the view, prioritize work effectively by gaining visibility into the schedule and dependencies between the planning items.



To get started with managing your work pipeline in Strategic Planning, see Prioritizing portfolio plan work in Strategic Planning Workspace.

Roadmaps in Strategic Planning

Strategically plan work for your company using visual roadmaps in Strategic Planning Workspace.

As your organization grows and priorities change, it's important to have the flexibility of changing existing plans and making new plans with ease. Using roadmaps, you can create a layout of current and upcoming plans while aligning them with your business objectives. Share these visual plans with other stakeholders across the organization, drive meaningful conversations, and validate common understandings.

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Each roadmap is a high-level block of work, prioritized by different planning personas such as enterprise project managers, portfolio managers, project managers, or others. Roadmaps also provide insights to the stakeholders while guiding the delivery teams during development.

The following are the types of roadmaps that you can work with:

- Portfolio plan roadmaps
- Free-form roadmaps

The features available in these roadmaps are:

- Hybrid roadmaps
- Roadmap-level milestones
- Planning item-level milestones
- Planning item dependencies
- Tracking mode

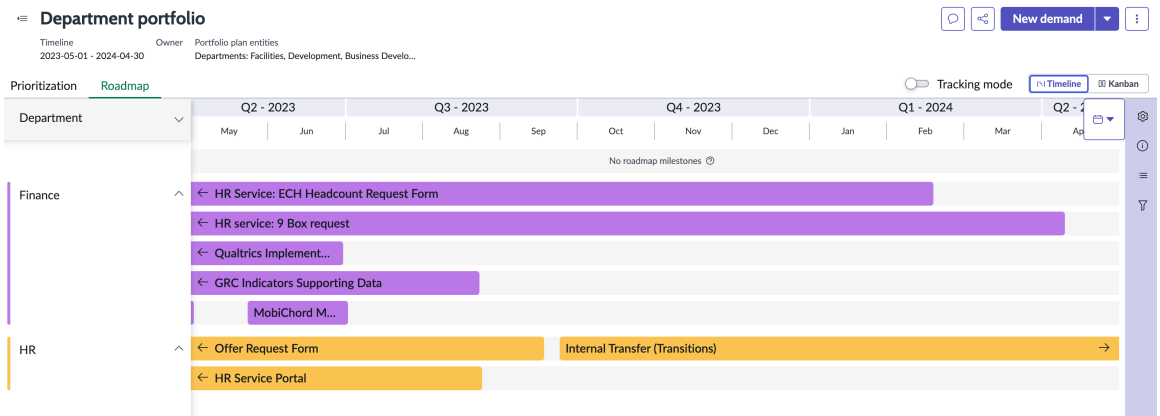
Note:
Roadmaps are available with Strategic Planning by default. Roadmap Planning (sn_roadmap_plng) is no longer available to install as a separate application.

Portfolio plan roadmaps

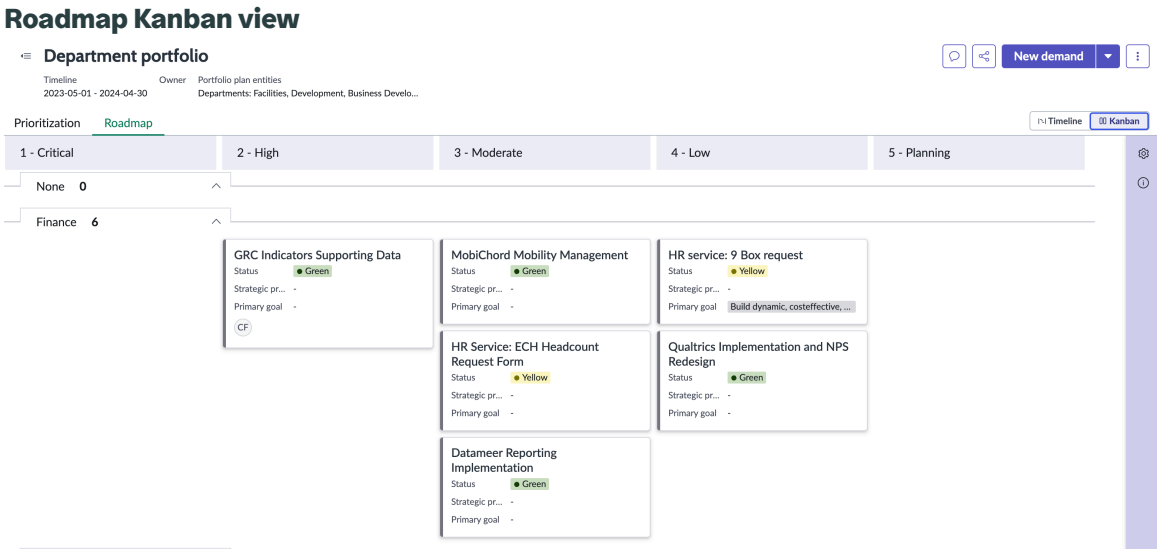
By creating a flexible portfolio plan using lenses, you can prioritize and roadmap work for your portfolio. Use these portfolio roadmaps to plan and track work in different perspectives of the organization separately, while connecting them to the high-level plans of the company.

Create a portfolio plan in Strategic Planning to get started. You can view and edit your roadmap in both Timeline and Kanban views.

Roadmap Timeline view



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Free-form roadmaps

Free-form roadmaps provide you the flexibility of planning and tracking work from different units of your company, such as work across multiple portfolios.

Using a filter condition, you can define what kind of work items you want on your roadmap. If you want to have a roadmap dedicated to just the projects of your department, define a roadmap for projects to start tracking the progress of current projects and create plans for new ones.

You can view and edit your free-form roadmap in both Timeline and Kanban views.

See Create a free-form roadmap in Strategic Planning Workspace.

Hybrid roadmaps

In Strategic Planning, with both the portfolio roadmaps and free-form roadmaps, you can build hybrid roadmaps. For example, you can have a combination of projects, demands, and epics in a single view.

Milestones on the roadmap

You can create milestones for your roadmap, or for each planning item on the roadmap.

Roadmap-level or portfolio-level milestones

The milestones created at the roadmap level can help with tracking launch dates or key events during that roadmap's timeline. To learn how to create roadmap milestones, see Add milestones for a roadmap in Strategic Planning Workspace.

Planning item milestones

Using the milestones created at the item level, you can focus better on strategic outcomes. These milestones help with tracking deadlines or other important dates. You can access milestones on all the planning items such as projects, demands, epics, and others.

From the roadmap, milestones can be created and updated for all types of planning items, except on projects. Project milestones are read-only on the roadmap because any changes to project milestones may impact the associated project plans. So, it is recommended to create or update project milestones using Project Workspace in Project Portfolio Management (PPM).

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To learn how to create item-level milestones on a roadmap, see Add milestones for roadmap items in Strategic Planning Workspace.

Planning item dependencies

While planning, it is essential to know how your planning items are connected with each other. Unless you know the dependency for each item, you might miss prioritizing time-critical projects or demands. This lack of information may also put you at risk of not scheduling the right work for the right time period.

Dependencies on the roadmap help you visualize these relationships between the planning items, so that you can adjust their scheduling accordingly.

In Strategic Planning, you can create simple or hybrid dependencies. For example, you can establish dependencies between two projects or between a project and an epic. Also, planning items can have dependency on items within the same portfolio plan or on items that aren't planned yet.

The dependency lines help you easily identify the items that may have to be prioritized together. Such easy identification of relationships between planning items provides better collaboration and facilitates enhanced decision making in the planning process.

To learn about creating and managing dependencies, see Add dependencies for roadmap items in Strategic Planning Workspace.

Tracking mode in roadmaps

Track status, progress, and metrics for each item on the roadmap. Using the status indicators and the percentage complete score on the planning item bars, make informed decisions ahead of time and easily communicate your work progress to the stakeholders.

See Track the progress of your roadmap items in Strategic Planning Workspace.

Alignment of your work with business goals

Each planning item that you create and schedule into a roadmap can associate to high-level business goals. Strategic Planning enables you to visualize how your work is aligned to these business goals directly from the roadmap view.

On the roadmap, you can group your planning items by the **Strategic priority** and **Primary goal** fields so that you can map your work to their goals.

Better together with other ServiceNow® applications

Integrate ServiceNow® Digital Portfolio Management (DPM) with Strategic Planning to provide DPM managers the access to roadmap planning. With this integration, you can:

- Optimize portfolio performance by monitoring services and their performance levels in a comprehensive roadmap.
- Make informed budgetary decisions and deliver shared outcomes by prioritizing backlogs and managing roadmaps of business applications.

For more information, see Exploring Digital Portfolio Management.

Related topics

Planning roadmaps in Strategic Planning Workspace

Goal Framework and Goal Framework for SPM

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Scenario planning in Strategic Planning

Create and evaluate strategic scenarios to explore different planning approaches. Approve the optimal scenario that aligns with the organizational goals and strategic priorities.

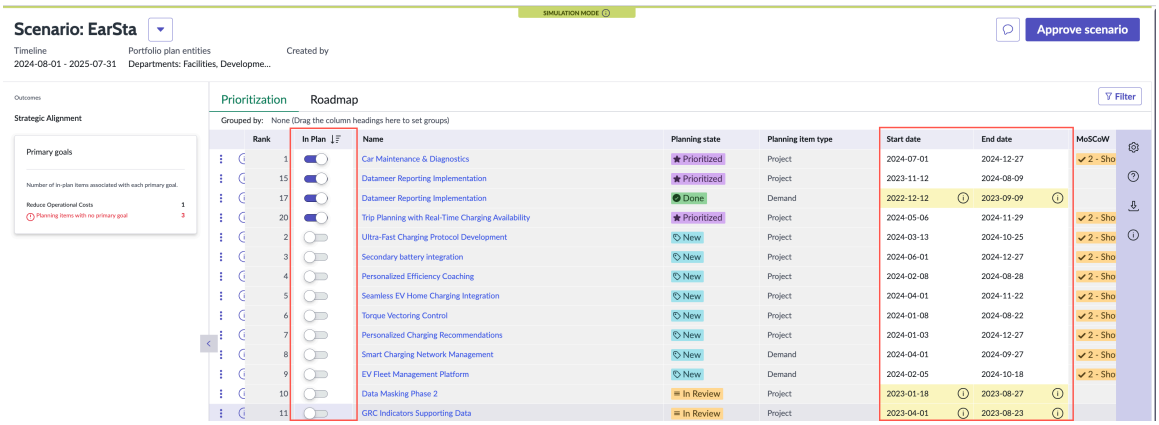
Scenario planning overview

Scenario planning in Strategic Planning enables organizations to create, evaluate, and approve the best strategic scenario that aligns with their strategic goals and intended business outcomes. This process helps in visualizing different approaches, assessing their impacts, and making informed decisions before implementing the live plan. By using scenario planning, organizations can anticipate potential challenges. Scenario planning overview

What is a scenario

A scenario in Strategic Planning is a simulated version of a plan that enables you to explore a strategic approach without affecting the live plan. It provides a safe environment to prioritize items, adjust timelines, and evaluate the potential impacts of each approach.

As compared to a plan, a scenario additionally has the following:



- **In Plan** toggle: The **In Plan** toggle enables you to prioritize or de-prioritize the planning items in the scenario you're creating. By default, when you create a scenario, the **In Plan** toggle is turned on for planning items that have all of the following field values:
  - Planning state as Prioritized or Done
  - Start and end dates within the portfolio plan dates.
- **Date** fields: The **Start date** and **End date** fields for the scenario are automatically populated based on either the planned or actual start and end dates of the planning items. You can update these dates during the scenario planning process. Once the scenario is approved, the updated dates are recorded as the approved dates for the planning items. If the updated dates fall outside the acceptable range, they're highlighted in yellow.

For more information on portfolio plans, see Portfolio plans in Strategic Planning.

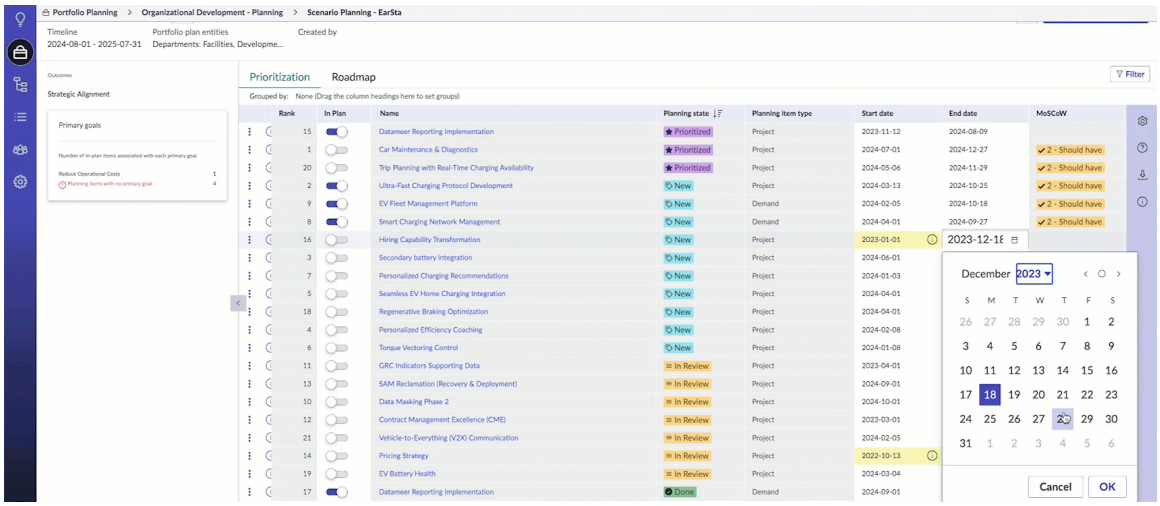
By comparing scenarios side by side, you can assess the differences in goal alignment and trade-offs between each scenario. This comparative analysis helps identify the scenario that best meets strategic objectives. For more information on comparing the scenarios, see Compare scenarios in Strategic Planning.

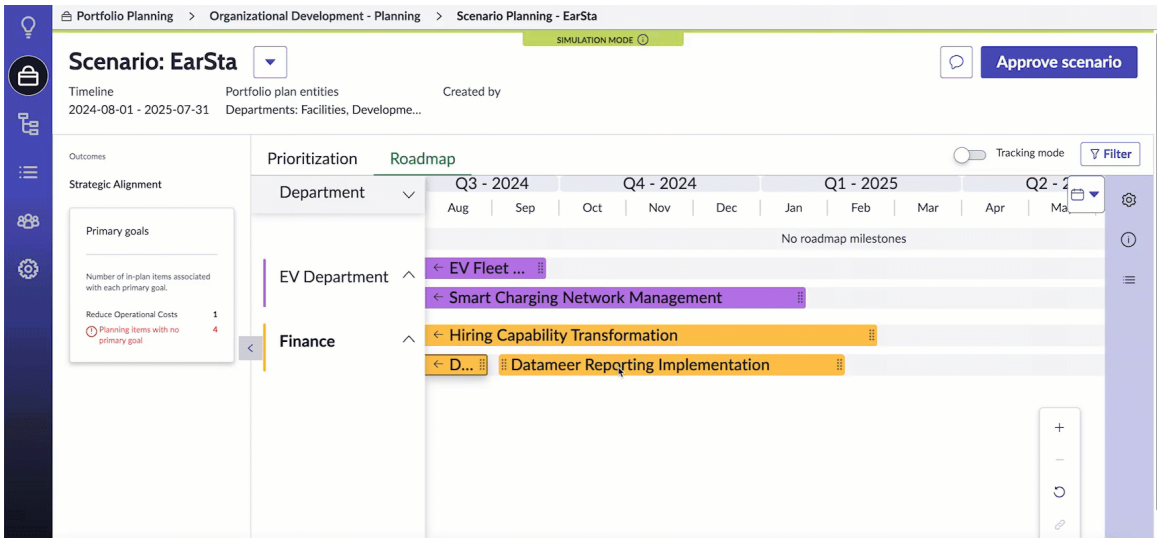
Scenario planning workflow in Strategic Planning

Using the Scenario Planning feature in Strategic Planning, you can perform the following activities:

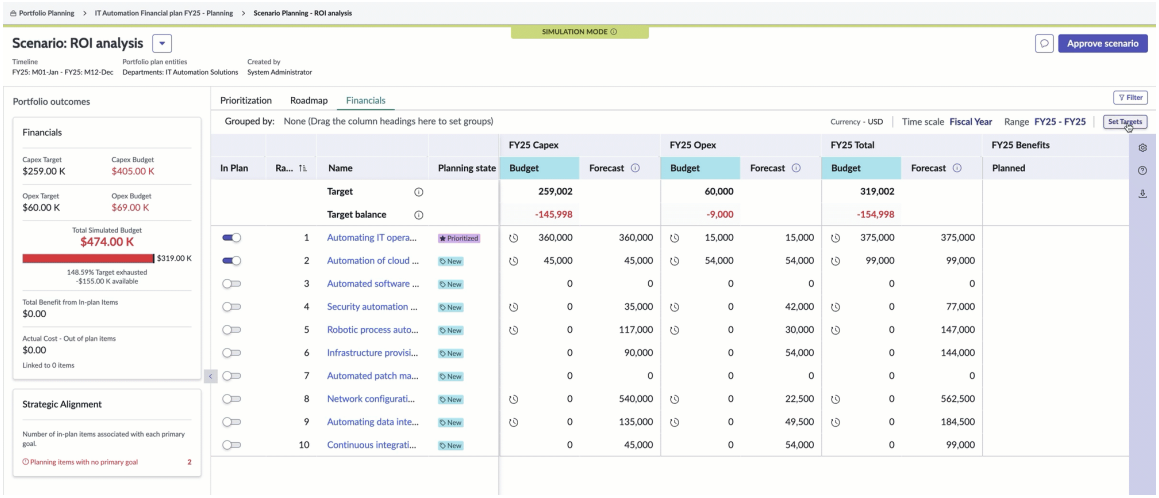
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- Create a scenario to explore different strategic approaches and business outcomes. For more information, see Create a scenario in Strategic Planning.
- Adjust and compare multiple scenarios side by side to evaluate differences in goal alignment, trade-offs, and financial benefits. For more information, see Compare scenarios in Strategic Planning.
- Approve the best scenario that aligns with the organizational goals. For more information, see Approve a scenario in Strategic Planning.
- Set a target portfolio budget for each of your planning cycle, which can be for fiscal period, quarter, yearly, or portfolio timeline.
- Evaluate the target vs proposed budget of In-plan items and review the monetary benefit from the prioritized items.





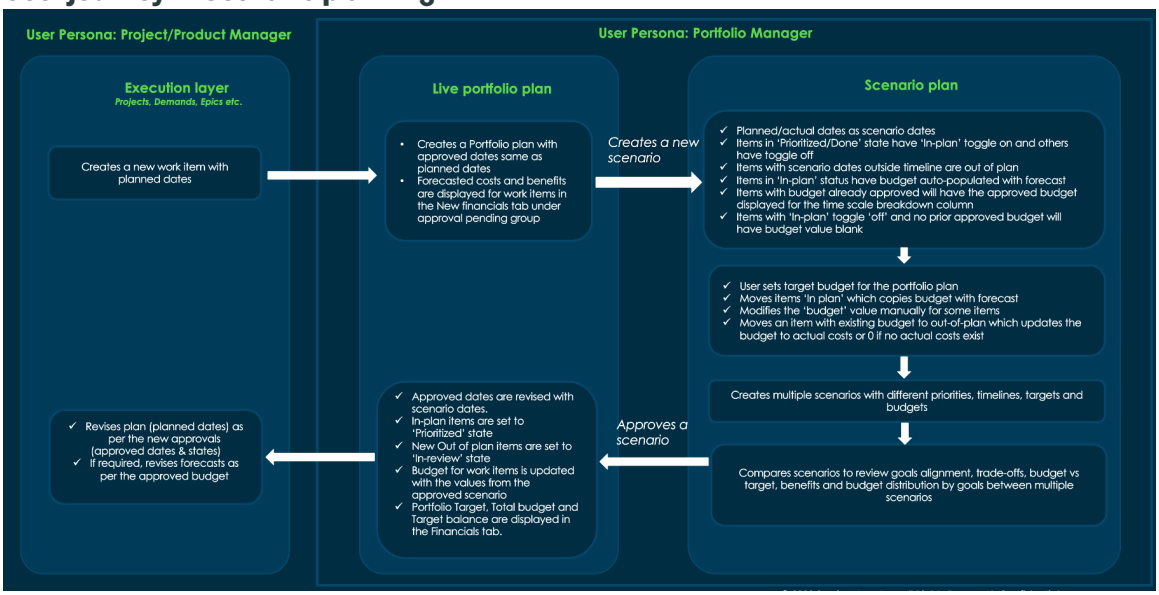
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Scenario Planning workflow overview

The scenario planning workflow involves an execution owner and a portfolio owner. The following illustration illustrates how scenario plans are created based on the planned or actual dates of planning items and how the In-plan toggle is adjusted based on the states of these planning items.

User journey in Scenario planning



For more detailed guidance on using scenario planning to enhance your Strategic Planning process, see Optimizing planning with scenario planning in Strategic Planning Workspace.

Capacity in Strategic Planning

The Capacity tab provides portfolio managers a comprehensive view of capacity, allocations, and utilization of resources.

Analyzing the Capacity screen, you can:

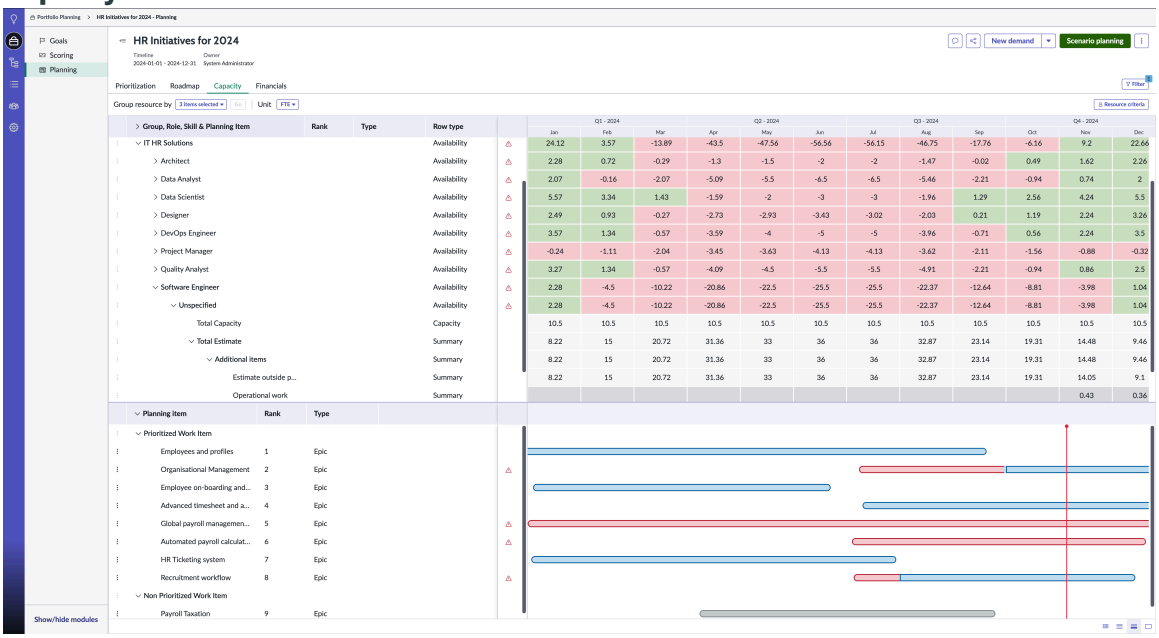
- View resource capacity for prioritized items in your portfolio.
- Understand the resource capacity needs and estimates across your organization by using key attributes such as group, role, and skill.
- Effectively forecast the supply of resources and the demand of work in your portfolio.

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- Understand and get an overview of the resource capacity allocations by using the color indicators.
- Plan for resources with specific skills or roles for future assignments.
- View the resource allocation health instantly with the new intuitive user interface that gives you a detailed breakdown of portfolio duration by month having over allocations.
- Identify the risks in resource capacity for the prioritized planning items using the Rank field.
- Use the warning icons to easily identify the over utilized resources (), planning items with actual dates (), and the planning items or resource groups with no resource assignments ().

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Capacity screen



The top screen area displays:

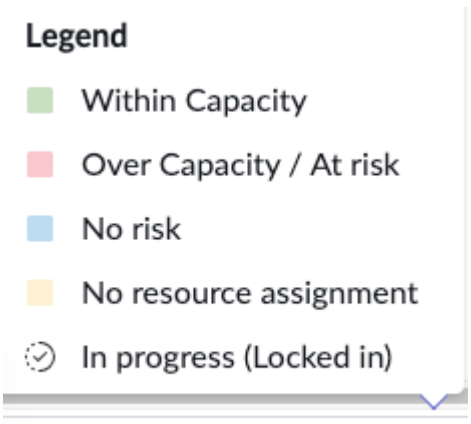
- Resource capacity details depending on the defined resource criteria.
- Allocation details for the time period.
- Resources grouped by primary attributes.

The bottom screen area displays:

- Prioritized planning items.
- Interactive Gantt chart for the duration of planning items. Select a Gantt bar to see the capacity for that specific planning item only.

> **Note:**
> Move the Gantt bar of a planning item to adjust the planned dates depending on the available resource capacity. Planning items with actual dates, indicated with in-progress icon ( ), cannot be adjusted for resource availability.

- Toggle option ( ) to adjust the resource capacity view.
- Legend explaining the visual representation of the resource capacity and Gantt bar of planning items.



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Financial planning for planning items

Plan, re-forecast, track the financials, and create baselines for all of your planning items.

You can work on financial planning supported on low level planning items like demands, projects, epics, features, capabilities, and so on.

The financials view provides a streamlined perspective, showcasing the actual and planned expenses for the entire fiscal period. You can view the latest estimated cost of completion by viewing the Actual costs for the past fiscal periods, planned costs for the current and future fiscal periods, and the total by quarter, year, or for the full scope of the item.

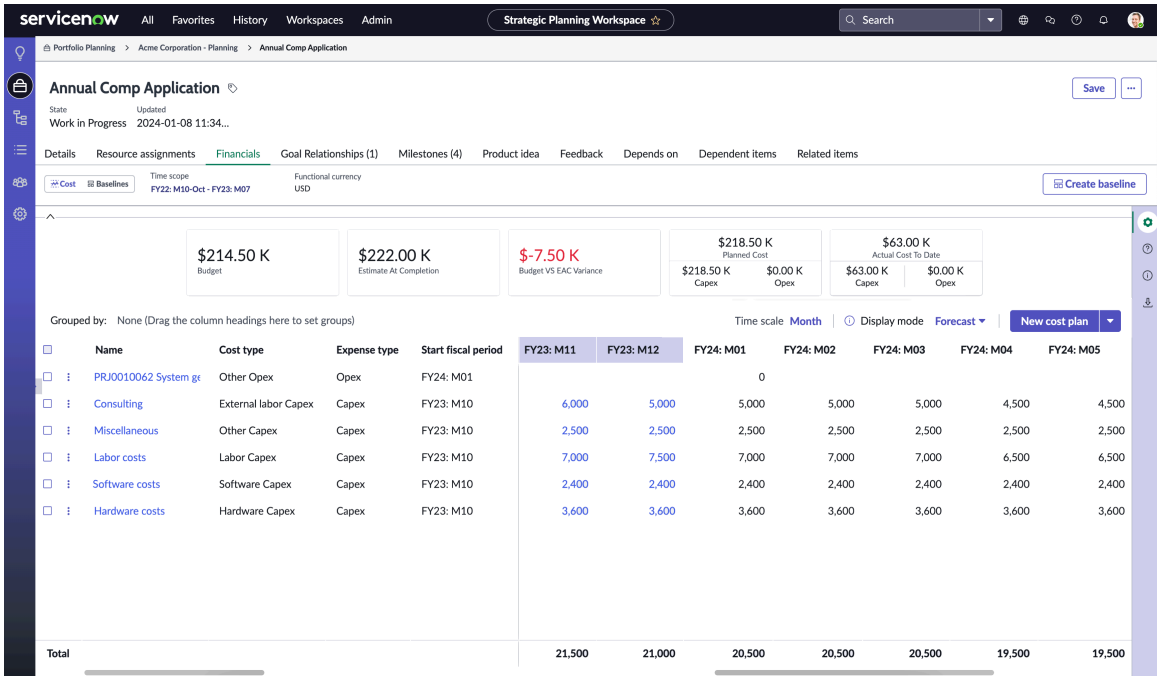
Note:

- Currently, Financials is not yet supported for high level entities like Initiatives, Strategic programs, Product ideas, and so on.
- Labor costs generation is not supported at planning item level.

Interface of the financials record page gives you the ability to create cost plans, expense lines, and baselines. As a financial user, you can:

- Enter high-level financial forecasts for planning items using the simple financials section in the Details tab.
- Work on high-level estimating for Planned opEx and Planned capEx.
- Create a detailed breakdown of the planned costs using the financials tab.
- View the rollups of Planned costs, Actuals costs, and Planned benefits for all of your planning items in the Prioritization grid.
- Add, edit, or delete cost plans effortlessly from the Cost screen.
- Re-forecast your planned expenses using the in-line editing feature.
- View a streamlined perspective, showcasing your actual costs for the past and planned expenses for the future, for the entire time scope of the planning item.
- Get a better comprehensive solution by viewing the Forecast (previously EAC - Estimate at Completion), Remaining Estimates (previously ETC - Estimate to Completion), and Actuals of each cost plan for the total time scope and the yearly breakdowns.
- Re-forecast the planned cost for future fiscal periods by directly updating the quarterly and yearly totals using the in-line editing capability of the grid.
- Generate labor costs depending on the resource assignments for the entire scope of the planning item broken down by the financial attributes configured for your organization. For more information on the planning attributes for attribute-based mapping, see Planning attributes.
- Add or edit expense lines against the cost plans easily from the side panel with the associated cost plan details pre-populated.
- Record unplanned expenses using the New expense line side panel.
- Create and compare financial baseline to track the financials of your planning items.
- Compare the latest costs (actual expenses for past fiscal periods and planned costs for current and future fiscal periods) with the initial forecasted planned costs by creating financial baseline and using the compare baselines capability.
- Analyze the cause of variance in costs and when did this occur over time by capturing the financial baselines manually or automatically.
- Switch between different display modes to get a focused view of the financial records.

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You can view the following information on the financials screen.

- Time scope: duration of the planning item or a cost plan, whichever has a larger fiscal period range.
- Functional currency: currency defined and used to calculate the financials.
- Customizable widgets showing different financial information such as allocated budget, Forecast (previously EAC - Estimate at Completion), Variance (the difference between budget and Forecast), breakdown of planned costs, and actuals by cost type.

> **Note:**
> Budget and Budget vs EAC Variance widgets are available for Demands and Projects only.

- Time scale: time period breakdowns to view the financials. Default value is set to Month/ Period, depending on the fiscal calendar type.
- Display mode: list options to switch between different modes to get a focused view of financials.
- Generate labor costs: one-click solution to generate or refresh the planned labor costs for the planning item depending on resource assignments.

> **Note:**
> This option is enabled for the projects with resource assignments only.

- The left pane gives you a tabulated view of the cost plan attributes displaying the Name, Cost type, Expense type, Stat fiscal period, End fiscal period, Total planned cost, Employee type, and Role. You can customize these fields. For more information, see Customize the left pane view for financials.
- In the right pane, you can view the total Actuals, Forecast, and Remaining Estimates for the selected Time scope duration. Actual expenses against a cost plan for the past fiscal periods, Actuals, Forecast, and Remaining Estimates for the current fiscal year, and planned costs for the current and future fiscal periods.

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Note:
The header rows of actuals and planned are color-coded differently to help you easily identify and differentiate between the expense types.

- New cost plan: opens a simplified side-panel to create a new cost plan for the entity.
- Personalize option to customize the columns in the left pane of the table.
- Export option to download Cost or Baselines comparison as Microsoft Excel or CSV file.

Strategic Planning with PPM, Agile 2.0, and SAFe

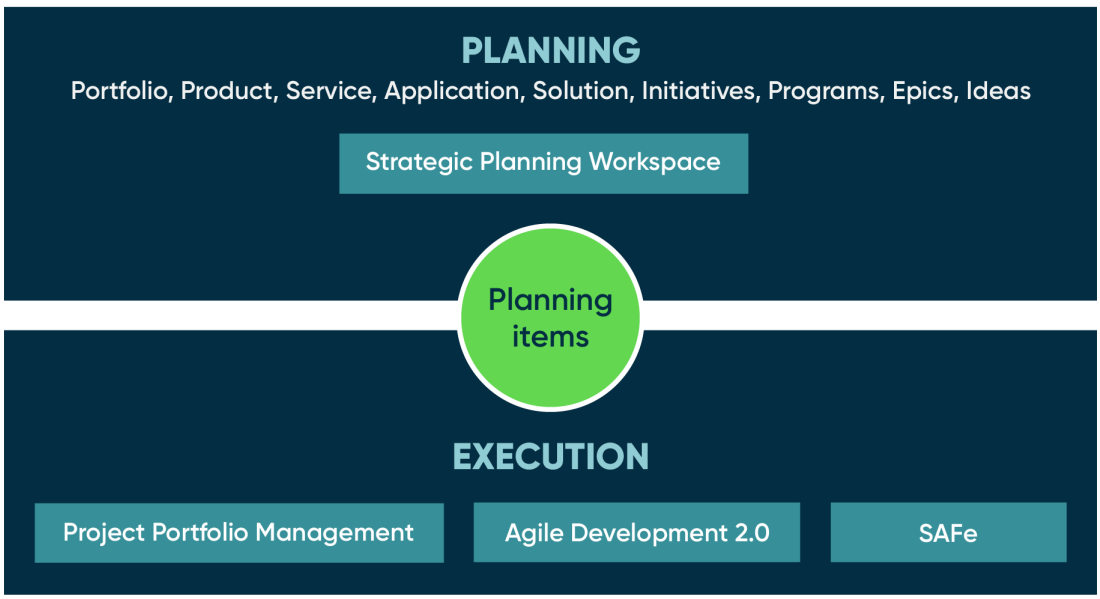
Facilitate execution of the work planned in Strategic Planning in ServiceNow applications such as Project Portfolio Management (PPM), Agile Development 2.0, or Scaled Agile Framework.

While planning personas like portfolio managers or product owners use Strategic Planning to align their plans with the business objectives, they can provide flexibility to the execution teams to decide how they deliver their work.

Teams can choose the methodology that would be the most effective for them, and decide on the execution system that would best fit their needs. They can use applications such as ServiceNow® Project Portfolio Management, Agile Development 2.0, or Scaled Agile Framework (SAFe) to execute the work planned by their managers.

With this flexible approach of delivering work, empower your teams to deliver more value, while being able to fund, manage, and monitor all work from a single workspace.

Strategic Planning integration with ServiceNow® applications



Key benefits of Strategic Planning with PPM, Agile 2.0, and SAFe

- View available PPM, Agile 2.0, and SAFe planning items in Strategic Planning .
- Import planning items from PPM, Agile 2.0, or SAFe to Strategic Planning .
- Export planning items from Strategic Planning to PPM, Agile 2.0, or SAFe.
- Synchronize updates for linked planning items of Strategic Planning with PPM, Agile 2.0, and SAFe.

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- Track the progress of the linked planning items in Strategic Planning.
- Track the flow of ideas from Idea portal to Feedback by integrating the Idea portal with Feedback.

To get started on integrating Strategic Planning with PPM, Agile 2.0, and SAFe, see Configuring Strategic Planning with PPM, Agile 2.0, and SAFe.

Better together with other ServiceNow® applications

Integration of Strategic Planning with other ServiceNow® applications helps portfolio and product managers to optimize planning, collaboration, and release management for their products.

Strategic Planning with Digital Product Release Workspace

Using the Digital Product lens, product managers can plan, prioritize, and roadmap the work for digital products by aligning with the business strategy.

As part of planning when you associate planning items with the product enhancement in the Strategic Planning Workspace, those associated planning items appear in the **Planning items** tab of the Release scope page in ServiceNow® Digital Product Release Workspace. This helps product managers track the status of the planning items associated with the product enhancements in the Digital Product Release Workspace itself to ease the release management for their products. For more information, see Scope of a release.

Strategic Planning with Collaborative Work Management

With the integration of ServiceNow® Collaborative Work Management (CWM) with Strategic Planning, you can plan, roadmap, and associate goals to Boards in a portfolio plan. By adding CWM Boards to a lens configuration, you can access them in the Prioritization, Roadmap, and Goals pages of a portfolio plan as planning items.

The lenses supported to configure CMW Board as a planning item are Organization, Project Portfolio, and Strategic Investments.

For more information on integration of CWM with Strategic Planning, see Connecting CWM with Strategic Planning or Portfolio Planning. To learn how to update the lens configuration, see Create or modify a lens in Strategic Planning.

Strategic Planning with Enterprise Architecture Workspace

Using the Business Capability lens, enterprise architects can plan, prioritize, and roadmap the work based on the business capabilities or business applications. For information on ServiceNow® Enterprise Architecture Workspace, see Enterprise Architecture Workspace.

Strategic Planning with Digital Portfolio Management

Integrate ServiceNow® Digital Portfolio Management (DPM) with Strategic Planning to provide DPM managers the access to roadmap planning. With this integration, you can:

- Optimize portfolio performance by monitoring services and their performance levels in a comprehensive roadmap.
- Make informed budgetary decisions and deliver shared outcomes by prioritizing backlogs and managing roadmaps of business applications.

For more information, see Exploring Digital Portfolio Management.

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Configuring Strategic Planning Workspace

Learn about the process required to set up Strategic Planning to enable your product and portfolio managers start aligning their work with business goals and strategy.

Configuration workflow

Use the following steps as guidelines to set up Strategic Planning. Some of these steps require the admin role and some require the sn_align_core.apw_admin role.

1. Install Strategic Planning.
2. Assign user roles.

   See the Roles installed table in Components installed with Strategic Planning Workspace.

   Note:
   If you are upgrading from an older version to Strategic Planning v2.1.0 or higher, a fix script is run to remove the milestone_editor role from the roadmap_editor role because the roadmap_editor role is no longer used. In this case, you may experience a longer time for the upgrade to complete if your ServiceNow instance has a large number of users with the roadmap_editor role. For more information, see KB1443618.

3. Configure lenses to enable your planning managers to create portfolio plans.

   See Lens configuration in Strategic Planning.

4. Enable high-level planning for tables that are not enabled by default.

   (Optional) See High-level planning configuration in Strategic Planning.

5. Validate your configuration for lens, planning items, portfolio plans, high-level planning, and others.

   See Strategic Planning diagnostics.

6. Configure Prioritization and Roadmap display settings.

   (Optional) See Prioritization display settings in Strategic Planning.

7. Configure Feedback and manage your feedback and product ideas. See Configuring Feedback application in Strategic Planning.
8. Integrate Strategic Planning with a ServiceNow® execution system of your choice. This integration enables you to plan in Strategic Planning and execute in your chosen app.

   See Configuring Strategic Planning with PPM, Agile 2.0, and SAFe and Configuring Feedback application in Strategic Planning.

9. Migrate your existing goals to Strategic Planning and configure goal preferences.

   See Configuring goals in Strategic Planning.

10. Configure Capacity Planning and generate resource capacity.

    See Capacity configuration in Strategic Planning.

11. Enable financial planning for epics and customise the Financials screen view.

    See Configure financials for Strategic Planning.

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Guided Setup to configure Strategic Planning

Guided Setup provides a sequence of tasks to help you with the required configuration on your ServiceNow instances. After installing Strategic Planning, navigate to **All** > **Strategic Planning** > **Guided Setup**.

When you're configuring a task from the Guided Setup, you can launch the in-app help for additional guidance by clicking the Show Help icon ( ).

Install Strategic Planning

Install the Strategic Planning application from ServiceNow Store if you have the admin role.

Before you begin

Ensure that the application and all of its associated store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application .

Role required: admin

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the Strategic Planning application using the filter criteria and search bar.

   You can search for the application by its name or ID (sn_apw_advanced). If you cannot find an application, you may have to request it from ServiceNow store.
3. Click **Install**.
4. In the Application installation dialog box, review the application dependencies.

   If your application requires other applications, install them first if they are not already installed. Installing your application also automatically installs the dependent applications or plugins if they are not installed already.
5. If you want to install demo data, click **Load demo data**.
   Demo data includes sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.
6. Click **Install**.

Result

The following components are installed with installation of the Strategic Planning application:

- Roles
- Tables

See Components installed with Strategic Planning Workspace for more information.

Planning item configuration for lenses and portfolio plans

Learn about the types of default and custom planning items that planning managers can work with in Strategic Planning Workspace.

For every portfolio plan that you build using a lens, only those item types that are added to that lens are available for planning. For example, a lens XYZ has epics and projects added to it. Then, in any portfolio plan that you build using the XYZ lens, you can plan for work in the form of epics and projects only.

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Default planning items

By default, you can use Projects, Demands, and Epics as planning items for your lens and build plans using them.

Pre-defined custom planning items

If you want to use a different item type, you can use up to five pre-defined custom planning item tables that are available in your ServiceNow instance.

1. Select one of the custom planning item type tables available. See Components installed with Strategic Planning Workspace.
2. Modify the label of the table that you want to use.

   For example, you want to plan for incidents, change the label of Custom planning item 1 to **Incident**.

3. Add this table to the *sn_align_core.planning_item_types_allow_list* property. See Enable custom item types in Strategic Planning.

New custom planning items

If you've used up all these five pre-defined custom planning item tables and want a different item type to use for your portfolio plans, you can define new item types. See Define a new planning item type in Strategic Planning.

Review existing planning item types in Strategic Planning

Before you create a portfolio plan using lenses, start with verifying that the default planning item types in Strategic Planning suit your company's planning needs.

Before you begin

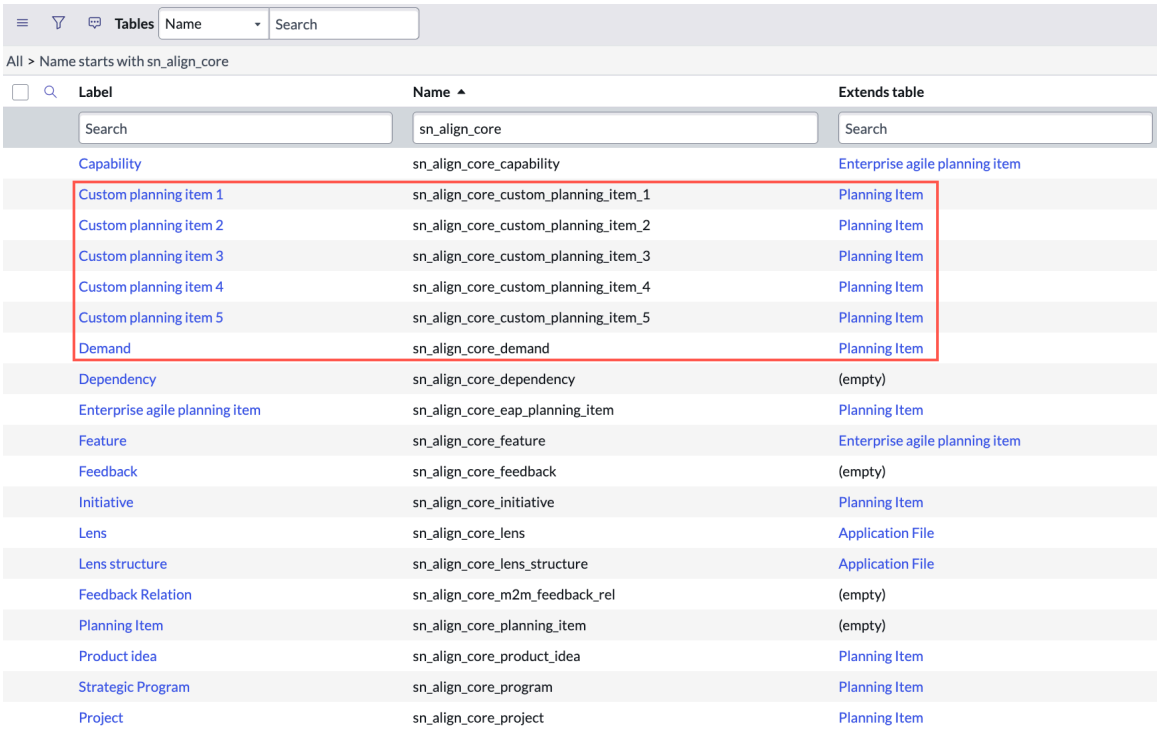
Ensure you have the details of your company's planning needs.

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Filter the list of tables by using **sn_align_core** in the Name column.

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Label	Name	Extends table
Search	sn_align_core	Search
Capability	sn_align_core_capability	Enterprise agile planning item
Custom planning item 1	sn_align_core_custom_planning_item_1	Planning Item
Custom planning item 2	sn_align_core_custom_planning_item_2	Planning Item
Custom planning item 3	sn_align_core_custom_planning_item_3	Planning Item
Custom planning item 4	sn_align_core_custom_planning_item_4	Planning Item
Custom planning item 5	sn_align_core_custom_planning_item_5	Planning Item
Demand	sn_align_core_demand	Planning Item
Dependency	sn_align_core_dependency	(empty)
Enterprise agile planning item	sn_align_core_eap_planning_item	Planning Item
Feature	sn_align_core_feature	Enterprise agile planning item
Feedback	sn_align_core_feedback	(empty)
Initiative	sn_align_core_initiative	Planning Item
Lens	sn_align_core_lens	Application File
Lens structure	sn_align_core_lens_structure	Application File
Feedback Relation	sn_align_core_m2m_feedback_rel	(empty)
Planning Item	sn_align_core_planning_item	(empty)
Product idea	sn_align_core_product_idea	Planning Item
Strategic Program	sn_align_core_program	Planning Item
Project	sn_align_core_project	Planning Item

3. Review the tables that have **Planning Item** in the Extends table column.
   Confirm if those are all the tables that you would require to set up lens required for portfolio plans.

What to do next

If you need a planning item type other than those available, use one of the five pre-defined custom planning item tables or you can create your own.

- Enable pre-defined custom planning item tables.
- Define a new planning item type in Strategic Planning

Define a new planning item type in Strategic Planning

Create a custom planning item type in Strategic Planning to enable planning them on the portfolio plans.

Before you begin

Ensure the application scope in your instance is set to Portfolio Planning.

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Select **New**.
3. On the form, fill in the fields.

   For field information, see Planning item type form.

4. **Optional:** Deselect the **Create module** checkbox.
5. Save the form.

   a. Select the Additional actions icon ( ).

   b. Select **Save**.

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What to do next

If you've created any planning item types, create relevant form views for it. For more information, see Create form views for new planning item tables in Strategic Planning.

Create form views for new planning item tables in Strategic Planning

For every new planning item table that you create, you must create the necessary form views. You can also customize the views for existing planning items.

Before you begin

- Define a new planning item type in Strategic Planning.
- Ensure that the application scope in your instance is set to Portfolio Planning.

Role required: admin

About this task

The following are the necessary form views:

- APW Preview: Supports the view that is used to display the planning item details on the roadmap side panel.
- APW Default: Supports the default view of the planning item form in Strategic Planning.
- APW New: Supports the form view that is used while creating a planning item of this type from the roadmap.

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Filter the list of tables by using **Planning Item** in the Extends table column.
3. Select a planning item type that you created.
4. Select the **Layout Form** related link.
5. From the **View name** field, select **New**.
6. In the **Create New View** window, enter one of the following names in the **View name** field:
   - To create the APW Preview view, enter **Workspace APW Preview**
   - To create the APW Default view, enter **Workspace APW Default**
   - To create the APW New view, enter **Workspace APW New**

   If you're creating a view other than these, ensure that your view name does not contain any special characters. For example, if you want to create a view with the name SAFe-Portfolio, replace the hyphen (-) with a space and enter the name as SAFe Portfolio.
7. Select **OK**
8. Using the Available and Selected lists of fields, select the fields to be visible on the form. You can also rearrange them in the order of your choice. To keep the form views of new tables consistent with that of the default settings, ensure you do the following changes:
   - For Preview and APW Default views, select the **Strategic priority** and the **Primary goal** fields to be visible on the form.
   - For all three views, select the field for the bottom entity of your lens to be visible on the form.
   - For all three views, add the Milestones related list. See Add a related list to a form.
9. Select **Save**.

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A new form view is created for this planning item type.

10. Repeat the steps 4 through 8 to complete creating the other two form views.

What to do next

Create list views for new planning item tables in Strategic Planning.

Create list views for new planning item tables in Strategic Planning

For every new planning item table that you create, you must create the necessary list views. You can also customize the views for existing planning items.

Before you begin

- Define a new planning item type in Strategic Planning.
- Ensure that the application scope in your instance is set to Portfolio Planning.

Role required: admin

About this task

Create the APW Default and APW Prioritization list views for the planning item table that you created.

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Filter the list of tables by using **Planning Item** in the Extends table column.
3. Select a planning item type that you created.
4. Select the **Layout List** related link.
5. From the **View name** field in the List view section, select **New**.
6. In the **View name** field, enter **APW Default**.
7. Select **OK**
8. Using the Available and Selected lists of fields, select the fields to be visible for the list view of this planning item.
   You can also rearrange them in the order of your choice.
9. Select **Save**.
   A new list view is created for this planning item type.
10. Repeat steps 4 to 9 to create a list view for **APW Prioritization**

What to do next

Create related list views for new planning item types in Strategic Planning

Create related list views for new planning item types in Strategic Planning

For every new planning item table that you create, you must create the necessary related list views. You can also customize the related list views for existing planning items.

Before you begin

- Define a new planning item type in Strategic Planning.
- Ensure that the application scope in your instance is set to Portfolio Planning.

Role required: admin

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About this task

Every Related list that you add to your planning item tables must be in the APW Default view.

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Filter the list of tables by using **Planning Item** in the Extends table column.
3. Select a planning item type that you created.
4. Select the **Show Form** related link.
5. From the form header, select the Additional actions menu (☰) and select **Configure** > **Related Lists**.
6. From the **View name** field in the List view section, select **New**.
7. In the **View name** field, enter **APW Default**.
8. Select **OK**
9. Using the Available and Selected lists of related lists, select the ones that you want on your planning item form.
   You can also rearrange them in the order of your choice.
10. Select **Save**.

What to do next

Create workspace view rules for new planning item forms in Strategic Planning.

Create workspace view rules for new planning item forms in Strategic Planning

Define workspace view rules for the form views of new planning item types in Strategic Planning.

Before you begin

- Create form views for new planning item tables in Strategic Planning
- Ensure the application scope in your instance is set to Portfolio Planning

Role required: admin

Procedure

1. Navigate to **All** > **Workspace Experience** > **Forms** > **Workspace View Rules**.
2. Select **New**.
3. On the form, fill in the fields.

   For field information, see View rule form.
4. In the Conditions section, select **Add Filter Condition** and add the following condition:
   - For APW Default view: **Created is not empty**
   - For Default view: **Created is empty**
5. Select **Submit**.
6. Repeat this process until you have completed creating both workspace view rules.

What to do next

Enable custom item types in Strategic Planning.

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Enable custom item types in Strategic Planning

Enable the usage of a custom planning item type in Strategic Planning so that your planning managers can start adding them to their free-form roadmaps or portfolio plans.

Before you begin

Role required: admin

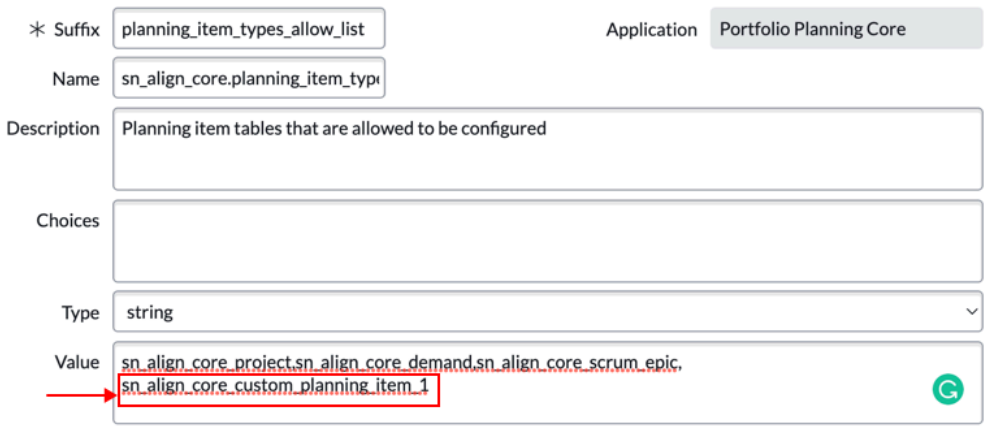
About this task

Add the table that you want to allow for planning in Portfolio plans and free-form roadmaps to a system property.

Procedure

1. Navigate to **All** > **System Properties** > **All Properties**.
2. Open one of the following system properties.
   - For portfolio plans: *sn_align_core.planning_item_types_allow_list*
   - For free-form roadmaps: *sn_align_ws.freeform_planning_items_creation_list*
3. In the **Value** field, add your custom table.

   For example, add **sn_align_core_custom_planning_item_1**.



4. Select **Update**.

What to do next

- For portfolio plans: Add your custom planning item type to the lens that your planning managers want to use. See Lens form.
- For free-form roadmaps: Create planning items from the roadmap view in Strategic Planning Workspace.

Lens configuration in Strategic Planning

Learn how to configure settings for planning items and add additional configuration for a lens in Strategic Planning so that you can set up lenses for your planning manager.

Your planning manager can use one of the nine pre-defined lenses - Project Portfolio, Project Program, Organization, Strategic Investments, Product, Digital Product, Value Stream, Goals, and Business Capability - to create portfolio plans, or you can set up a custom lens structure for them.

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Pre-defined lens	Custom lens
1. Navigate to the Lenses list and add Epic as a planning item for each of the pre-defined lenses. See Lens form. 2. (Optional) Change the structure for these lenses per your requirements. See Add or modify lens structure in Strategic Planning. 3. For the planning items types included in the Product or Strategic Investment lenses, ensure that all necessary form and list views have a field for the bottom entity of the lens. 4. For Product or Strategic Investment lenses, update roadmap configuration to include the bottom entity and its parent entity in **Group by fields** and **Color by fields**. See Customize the planning item display preferences for Prioritization and Roadmap. 5. Configure integration with a ServiceNow execution application of your choice. See Configuring Strategic Planning with PPM, Agile 2.0, and SAFe.	1. Create or modify a lens in Strategic Planning. 2. Add or modify lens structure in Strategic Planning. 3. Associate planning items to the bottom entity of the lens. See Lens structure form. 4. Ensure that all APW form views of all planning item types include a field for the bottom entity of the lens. 5. Update roadmap configuration to include the bottom entity and its parent entity in **Group by fields** and **Color by fields**. See Customize the planning item display preferences for Prioritization and Roadmap. 6. Validate and activate your lens. See Activate a lens in Strategic Planning. 7. Configure integration with a ServiceNow execution application of your choice. See Configuring Strategic Planning with PPM, Agile 2.0, and SAFe.

Create or modify a lens in Strategic Planning

Start defining your company's planning perspectives in Strategic Planning by creating a lens.

Before you begin

Role required: admin

About this task

Create a lens record and add the type of items (Project, Demand, and others) that can be planned using this lens. The type of planning items that you associate with the lens are the only type of work that the planning managers can use, in their portfolio plans.

Procedure

1. Navigate to **All** > **Strategic Planning** > **Lenses**.
2. Select **New**.
3. On the form, fill in the fields.
   For field information, see Lens form.
4. Select **Submit**.

What to do next

Add or modify lens structure in Strategic Planning.

Related topics

Lenses in Strategic Planning

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Add or modify lens structure in Strategic Planning

Add entities to your lens and build its structure so that your planning managers can start creating their portfolio plans in Strategic Planning.

Before you begin

Ensure that your application scope is set to **Portfolio Planning Core**.

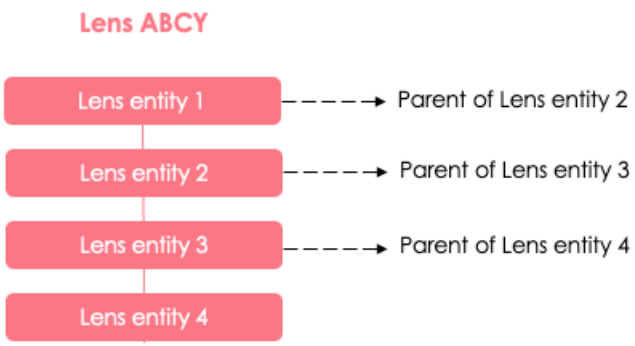
Role required: admin

About this task

For a lens, add entities to build a new lens structure or to modify the existing structure. You can add up to six entities in a lens structure. For more information on lens and its structure, see Lens configuration in Strategic Planning.

Procedure

1. Navigate to **All** > **Strategic Planning** > **Lenses**.
2. From the Lenses list, select a lens for which you want to add or update the lens structure.
3. Add an entity to the lens structure.
   a. From the Lens structure related list, select **New.**
   b. On the form, fill in the fields.
      For field information, see Lens structure form.
   c. Select **Submit.**
4. Repeat step 3 to complete adding all your lens entities.
   - Add the entities in a top-down manner:
     Add the top-level entity first, followed by the second-level entity, followed by the third, and so on.
   - Ensure that every entity, except the top-level, has a parent entity reference.
     For example, the second-level entity must refer to the top-level entity as its parent.



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What to do next

1. Verify that the Planning item table [sn_align_core_planning_item] has a field that references the bottom entity of this lens.
2. Ensure that the following form views for all the planning item types that are associated in your lens contains a field for the bottom entity of your lens structure.
   - APW Preview
   - APW New
   - APW Default
3. Update the roadmap configuration for the tables all planning item types that you associate with this lens:

   Add the bottom entity of this lens structure and its parent to **Group by fields** and **Color by fields**. These fields are used as the default group by and color by settings for the portfolio roadmap. See Customize the planning item display preferences for Prioritization and Roadmap.
4. Validate your lens configuration and activate it. See Activate a lens in Strategic Planning.

Activate a lens in Strategic Planning

Validate your lens configuration and activate it so that your planning managers can start creating portfolio plans using this lens.

Before you begin

Role required: admin

About this task

If you've changed the structure of an existing lens or created a custom lens, validate its configuration and set its state to Active.

Planning managers can create portfolio plans using only lenses that are active. For a lens to be available in the workspace for a planning manager, its configuration must be valid and must be in the Active state.

Procedure

1. Navigate to **All** > **Strategic Planning** > **Lenses**.
2. From the Lenses list, select a lens.
3. On the lens form, click the **Validate Lens** related link.
   - If the lens configuration is valid, a success message prompts you that you can now activate it.
   - If the lens configuration isn't valid, use the error messages to understand the issues and fix the configuration.

     Try validating the lens using the related link again.
4. Select the **Active** field and save the form.

Related topics

Add or modify lens structure in Strategic Planning

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High-level planning configuration in Strategic Planning

If your planning managers need high-level planning enabled for items other than the default ones, you need to update the configuration for lens entities and portfolio plans.

By default, Strategic Programs, Programs (pm_program), and Initiatives are the items that are enabled for high-level planning. Also by default, the Product Enhancement entity with the Digital Product lens is enabled for high-level planning. To enable other planning item types, complete the following configuration tasks.

Note:
High-level planning is enabled for Strategic Planning v2.1.0 and higher.

For items that extend the Planning Item table

For example, you added Custom planning item 1 [sn_align_core_custom_planning_item_1] to your lens structure and you want to use it for high-level portfolio plans. In the Lens structure related list for your lens, set the **Planning enabled** field to **true** for the Custom planning item 1 entity. For detailed information, see Enable high-level planning for a lens entity.

For items that do not extend the Planning Item table

Consider the example of enabling high-level planning for the Strategic Priority [sn_gf_strategy] planning item type.

1. Create a global rank column in the Strategic Priority [sn_gf_strategy] table. See Create global rank column for high-level planning.
2. Create rank configuration for the new global rank column. See Create rank configuration for high-level planning.
3. Create portfolio plan configuration for the Strategic Priority [sn_gf_strategy] table. See Create portfolio plan configuration for high-level planning.
4. Enable high-level planning for the Strategic Priority [sn_gf_strategy] entity in the lens structure record. See Enable high-level planning for a lens entity.
5. Run diagnostics and fix script to populate global rank for all existing Strategic Priority records. See Populate global rank for high-level planning items.
6. Create a business rule for the Strategic Priority [sn_gf_strategy] table to enable setting a global rank for any future records created. See Create a business rule for high-level planning.

Tip:
While choosing a table as your high-level planning entity, ensure that it has fields such as start date and end date, owner or assigned to, name or short description, so that this can be used as a planning item. For example, you cannot use the Organization or Product tables as your high-level planning entities. On the other hand, the Strategic Priority tables meets the requirements of a planning item and can be configured for high-level planning.

Once all these tasks are complete, your planning manager can create a high-level portfolio plan for the desired entity - for this example, portfolio plans can be created to prioritize and roadmap the strategic priorities of the company, and to view how the work across the company is aligned to these strategic priorities.

Create global rank column for high-level planning

Create a global rank column for planning item types that do not extend the Planning Item [sn_align_planning_item] table so that you can enable high-level planning for these items in Strategic Planning Workspace.

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Before you begin
Upgrade to Strategic Planning v2.1.0.

Role required: admin

About this task
Create a **Global rank** column on the planning item table for which you want to enable high-level planning. This column allows populating a global rank for all existing and new records of this table in your ServiceNow instance.

Procedure
1. Navigate to **All** > **System Definition** > **Tables**.
2. Search for and open your planning item table.

   For example, search for and open the Strategic Priority [sn_gf_strategy] table.
3. From the Columns related list, select **New**.
4. On the form, fill in the following fields.

Dictionary Entry form fields

Field	Description
Table	Table for which you are creating this column. This field is automatically set to the table you've selected in Step 2.
Type	Value type of the column that you're creating. Select **Long**.
Column label	Label for the rank column. Enter **Global rank**.
Column name	Auto-generated unique name for the column.
Application	Application scope of the table. This field is populated automatically based on the table that you selected.

   For complete details of the Dictionary Entry form fields, see Dictionary entry form.
5. Save the form.

What to do next
Create a rank configuration for the global rank field you created. See Create rank configuration for high-level planning.

Create rank configuration for high-level planning

To enable high-level planning on a table that is not a planning item in Strategic Planning Workspace, create a rank configuration for the global rank column of the table.

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Before you begin
Create global rank column for high-level planning.

Role required: admin

About this task
Create a configuration for the global_rank column for the table that you want to enable for high-level planning. Completing this task would allow you assigning a global rank value to the records of this table.

In this task, consider the example of creating a rank configuration for the Strategic Priority [sn_gf_strategy] table.

Procedure
1. Navigate to **All** > **rank_configuration.list**.
   A list of tables that have a configuration for their Global rank field is shown.
2. Select **New**.
3. On the form, fill in the fields.

Rank Configuration form

Field	Description
Table	Table that you want to enable high-level planning. For example, Strategic Priority [sn_gf_strategy]
Column	Global rank column of your table.

4. Select **Submit**.

What to do next
Create a portfolio plan configuration for your high-level planning table. See Create portfolio plan configuration for high-level planning.

Create portfolio plan configuration for high-level planning

To enable high-level planning on a table that is not a planning item in Strategic Planning Workspace, create portfolio plan configuration for the table.

Before you begin
Create rank configuration for high-level planning

Role required: admin

About this task
After creating a global rank column and a rank configuration for that column, create a portfolio plan configuration for the table that you chose for high-level planning. Following this task, configure the Proritization and Rodmap page settings for a portfolio plan that your planning managers would create for this table.

In this task, consider the example of Strategic Priority [sn_gf_strategy] table.

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Procedure

1. Navigate to **All** > **sn_align_ws_roadmap_configuration.list**.
   A list of existing portfolio plan configuration records for the Strategic Planning tables is shown.
2. Select **New** to create a portfolio plan configuration for your table.
3. On the form, fill the fields.

Portfolio plan configuration

Field	Description
Source table	Table that you want to enable high-level planning for. For example, **Strategic Priority [sn_gf_strategy]**.

Rank configuration

Field	Description
Rank configuration	Table that is used to create the portfolio plan. The value for this field is the table selected in the **Source table** field.

For complete details of the fields on this form, see Portfolio plan configuration form.

4. Save the form.

What to do next
Populate global rank value for all existing records of your high-level planning table.

Enable high-level planning for a lens entity

To enable high-level planning on for an entity in Strategic Planning Workspace, update the lens entity configuration.

Before you begin
Create portfolio plan configuration for high-level planning.

Role required: admin

About this task
For the table that you want to enable high-level planning, set the **Planning enabled** field to **Yes** in the Lens form. Completing this task would enable your planning managers to create portfolio plans using this table as a planning item, in Strategic Planning Workspace.

For this task, consider the example of Strategic Investments as the lens and the Strategic Priority [sn_gf_strategy] table as the high-level planning entity.

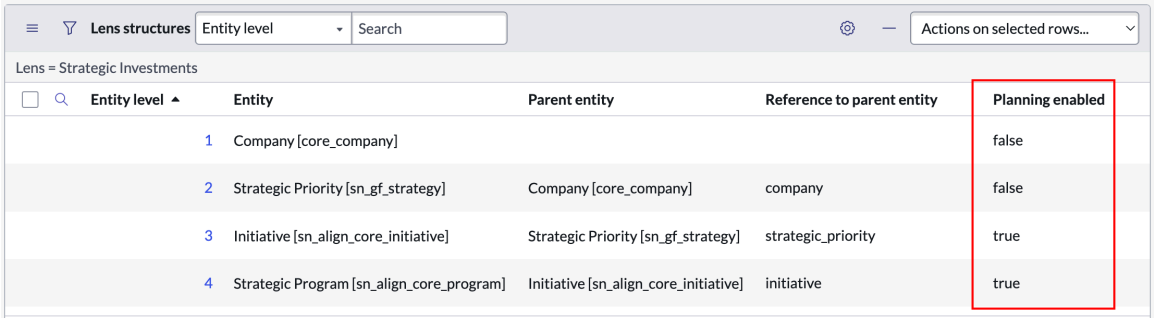
Procedure

1. Navigate to **All** > **Strategic Planning** > **Lenses**.
2. Select and open the lens that you want to use for high-level planning.
   For example, select **Strategic Investments**.

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3. In the Lens structures related list of the Lens form, set the **Planning enabled** field of your high-level entity to **true**.
   For example, set the Planning enabled field of Strategic Priority entity to **true**.

   If your high-level entity is not a part of your lens structure, you can add it. See Add or modify lens structure in Strategic Planning.



4. Save the Lens form.

Result
Your planning managers can now create portfolio plans on the Strategic Investment lens and use Strategic Priority as their planning item.

Important:
Once a portfolio plan is creating based on this entity, you can neither disable high-level planning for it nor delete the entity record from the lens structure.

What to do next
Populate global rank for high-level planning items.

Populate global rank for high-level planning items

To enable high-level planning on a table that is not a planning item in Strategic Planning Workspace, populate global rank for existing records of this table.

Before you begin
Enable high-level planning for a lens entity.

Role required: admin

About this task
Use the Strategic Planning diagnostics module to populate global rank for all existing records of the table that your planning managers chose for high-level planning. Completing this task would generate a value for the Global rank field of your table.

For this task, consider the example of generating a rank value for all existing records of the Strategic Priority [sn_gf_strategy] table.

Procedure
1. Navigate to **All** > **Strategic Planning** > **Diagnostics**.
2. Run the Identify the high-level entities enabled for planning, without a global rank diagnostic script by selecting **Run Diagnosis**.
   The diagnosis would fail and show you the type and the total number of records that are missing a global rank.

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3. Select **Run fix script** to populate global rank value for all the flagged records.
   You can verify that the rank is populated by running the diagnostic script again. You would see that the diagnosis is a success.

What to do next
Create a business rule to populate global rank on any future records create on your high-level planning table. See Create a business rule for high-level planning.

Create a business rule for high-level planning

To enable high-level planning on a table that is not a planning item in Strategic Planning Workspace, create a business rule to allow assigning a rank value for all future records of this table.

Before you begin
Populate global rank for high-level planning items.

Role required: admin

About this task
All future records of your high-level planning entity must have a global rank so that when your planning managers reorder and prioritize items of this type in their portfolio plan, their rank is automatically updated. To enable this auto assigning of rank value to any new records, create a business rule.

For this task, consider the example of creating a business rule on the Strategic Priority [sn_gf_strategy], to enable auto-assignment of rank value for all its future records.

Procedure
1. Navigate to **All** > **System Definition** > **Tables**.
2. Search for and open your planning item table.

   For example, search for and open the Strategic Priority [sn_gf_strategy] table.
3. Right-click the form header and select **Configure** > **Business Rule**.
4. Select **New**.
5. On the form, fill in the fields.

Business Rule form

Field	Description
Name	Name to identify the rule. For example, **Strategic Priority rank insert rule**.
Table	Table on which this business rule is applied. For this example, select **Strategic Priority [sn_gf_strategy]**.
Advanced	Option to enable advanced settings for this business rule.

6. In the Advanced related list, enter the following code in the **Script** field.

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```
(function executeRule(current, previous /*null when async*/)
{
    var spwRankingHelper = new
 sn_align_core.SPWRankingHelper();
    var rankConfig =
 spwRankingHelper.getRankConfiguration(current.getTableName());
    if (rankConfig.isValidRecord())
    {
        var sequencer = new
 sn_align_core.AlignmentPlanningRankProcessor(rankConfig.getVal
ue("table"), rankConfig.getValue("column"));
        sequencer.generateNewIndex(current);
    }
})
(current, previous);
```

7. In the When to run related list, enable the **Insert** option.
8. Save the form.

Result

This task is the end of the series of tasks to enable high-level planning on a table that does not extend the Planning Item [sn_align_planning_item] table. After this task is complete, you can notify your planning managers that they can start creating portfolio plans for the configured entity type.

See Managing portfolio plans in Strategic Planning Workspace.

Custom scoring frameworks in Strategic Planning

Learn how to create a custom scoring framework and associate it with a portfolio plan, so you can prioritize your planning items based on a defined score.

You may use one of the three pre-defined scoring frameworks - RICE, Value vs Effort, or WSJF, or you can create a custom scoring framework and associate it with your portfolio plan.

> **Note:**
> The pre-defined scoring frameworks aren't editable. Administrators can enable or disable the base system scoring frameworks by setting the Active field on the Scoring Framework form.

Create a custom scoring framework

Start scoring your planning items based on your preferences by creating a custom scoring framework.

Before you begin

Role required: sn_align_core_apw_admin

About this task

Creating a custom scoring framework.

Procedure

1. Navigate to **All** > **Strategic Planning** > **Scoring Frameworks**.
2. Select **New**.
3. Enter a name of your scoring framework in the **Name** field.

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4. Enter the details of your scoring framework in the **Description** field.
5. Select **Submit**.

What to do next
Create your scoring framework attributes

Create your scoring framework attributes

Add attributes within your scoring framework, so that you can build a formula and start scoring your planning items within your portfolio plan.

Before you begin
Role required: sn_align_core.apw_admin

About this task
Create Scoring Framework attribute.

Procedure
1. Navigate to **All** > **Strategic Planning** > **Scoring Frameworks**.
2. From the Scoring Frameworks list, select a framework for which you want to add the Scoring Framework Attributes.
3. Select **New**, from the Scoring Framework Attributes related list.
4. On the form, fill in the fields.

Scoring Framework Attribute form

Field	Description
Label	Name that defines your scoring Framework.
Type	Type of the label, such as integer, choice, star, and so on.
Description	Details of the Scoring Framework.

Tip:
If you want to add a choice type scoring attribute, ensure to have Decimal or Integer in the **Type** field, and Choice in the **Display type** field.

5. Select **Submit**.
6. Repeat step 3 to add all your Scoring Framework Attributes.

What to do next
Create a final score attribute

Create a final score attribute

Learn how to create an attribute to calculate the final score of your Scoring Framework.

Before you begin
Role required: sn_align_core_apw_admin

About this task
Create an attribute to calculate the final score of a Scoring Framework.

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Procedure

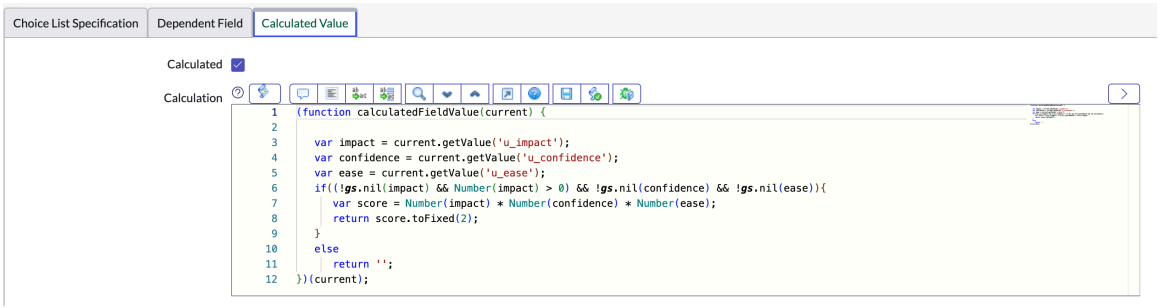
1. Navigate to **All** > **Strategic Planning** > **Scoring Frameworks**.
2. From the Scoring Frameworks list, select a framework for which you want to add the final score attribute.
3. Select **New**, from the Scoring Framework Attributes related list.
4. On the form, fill in the fields.

Scoring Framework Attribute form

Field	Description
Label	Name that defines your Scoring Framework's final score.
Type	Type of the label, such as choice, decimal, integer, or string.
Description	Details of the Scoring Framework attribute.

5. Select the **Final score** option to mark this attribute as the final score attribute of your Scoring Framework.
6. Select the **Calculated Value** tab and add a formula to derive the value of the final score attribute
   This formula should be based only on the scoring attributes of your scoring framework. In the this example, the ICE custom framework has the formula:

```
ICE score = Impact * Confidence * Ease
```



7. Select **Update**.

Configuring goals in Strategic Planning

To define and manage goals in Strategic Planning, you must perform some initial administrative tasks for the workspace to be fully functional. The data displayed in the goals view in Strategic Planning is stored in the Goal Framework tables.

- With the admin role, you can migrate the existing goals data to the Goal Framework tables.
- With the sn_gf.goal_admin role, you can set the goal preferences.

Post migration of your existing goals (if any) and configuring the goal preferences, use the Goals view in Strategic Planning to define your goals. For more information, see Managing goals in Strategic Planning Workspace.

Migrate existing goals data to Goal Framework tables

With the admin role, you can migrate the existing goals data to the Goal Framework tables by running the scheduled job.

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Before you begin
Role required: admin

About this task

Note:
Migrating data to the Goal Framework tables is a one-time job, and not meant to be on a schedule.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Search for and click the **Migrate Goal, Strategy, and Work item data to the Goal Framework and related Planning item tables** scheduled job.
3. On the Scheduled Script Execution form:
   a. Ensure that the frequency is selected as **On Demand** in the **Run** field.
   b. Set the value to **true** for the required parameters in the **Run this script** field.
   For parameters information, see Migrate Goal, Strategy, and Work item data to the Goal Framework and related Planning item tables.
4. Click **Execute Now**.

Configure goal preferences

Configure goal preferences to manage goals such as the calendar type used for goal setting, weighted average calculation for goal progress, and deletion of goals and targets.

Before you begin
Role required: sn_gf.goal_admin

Procedure

1. Navigate to **All** > **Enterprise Goal Management** > **Preferences**.
2. On the Goal Preferences form, configure the properties.
   For properties information, see Goal Preferences form.
3. Click **Save**.

Customize label for Goal and Target tables

Customize the label for Goal [sn_gf_goal] and Target [sn_gf_goal_target] tables according to your organization's requirement.

Before you begin
Role required: admin

About this task
When you rename the label for the Goal [sn_gf_goal] and Target [sn_gf_goal_target] tables, the changes apply to these labels across the Heisenberg UI and the Workspace UI. Also, the **Goals** and **Targets** modules under **Enterprise Goal Management** in the navigation pane will be renamed.

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Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Customize the label name for the tables according to your requirement.

Configure a table for an assigned entity

Configure a table for an assigned entity type, so that the goal user can associate goals with the required assigned entity.

Before you begin
Role required: sn_gf.goal_admin

About this task

- By default, with the installation of Strategic Planning, the assigned entities, Business Unit [business_unit], Department [cmn_department], and Company [core_company], Product Model [cmdb_model], Value Stream [cmn_value_stream], Intiative [sn_align_core_initiative], and Strategic Program [sn_align_core_program] are installed.
- With the activation of PPM Standard (Project Portfolio Management), the Portfolio [pm_portfolio] assigned entity is installed.

About this task
An assigned entity is an organizational unit or structure that a goal can be associated with, such as a business unit or department. Assigned entities provide context for goals by linking them to the relevant part of your organization, making it easier to track and manage goals at any level.

Procedure

1. Navigate to **All** > **Enterprise Goal Management** > **Assigned Entities**.
2. Click **New**.
3. On the form, fill in the fields.
   For field information, see Goal Assigned Entity Configuration form.
4. Click **Submit**.

Create goals demo data with target breakdowns

Run the **Create Goals Demo Data with Target Breakdowns** schedule job to create goals demo data with target breakdowns, so that you can view the target breakdowns section on the Goals page.

About this task
You must run the job to be able to see the target breakdowns section in the Goals and targets tab on the Goals page.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Search for and select the **Create Goals Demo Data with Target Breakdowns** scheduled job.
3. On the Scheduled Script Execution form, ensure that the frequency is selected as **On Demand** in the **Run** field.
4. Select **Execute Now**.

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Result
A goals demo data with target breakdowns is created. You can now view the target breakdowns for your goals in the Goals and targets tab on the Goals page.

Import goals and targets data from a spreadsheet

With the admin role, you can import your existing goals and targets data from a spreadsheet to the Goal Framework tables.

Before you begin
Role required: sn_gf.goal_admin

- On a successful job run, the goals data from your spreadsheet is imported to the Goal [sn_gf_goal] table.
- On a successful job run, the targets data from your spreadsheet is imported to the Target [sn_gf_goal_target] table.

Note:
Because the targets are associated to a goal, you should import the goals first and then the targets.

Important:
Goals and targets data in the spreadsheet must be in the supported format. For details on the supported data format to import goals and targets data from a spreadsheet, see Import goals and targets data [KB1191233].

Procedure

1. Navigate to **All** > **System Import Sets** > **Load Data**.
2. From the Import set table drop-down list, select **Goal Import Set [imp_sn_gf_goal]** or **Target Import Set [imp_sn_gf_goal_target]**.
3. From the **Source of the import** option, select **File**.
4. In the **File** option, click **Choose** and select your spreadsheet to import the data.

   Important:
   - Goals and targets data in the spreadsheet must be in a specific format. For details on the supported data format, see Import goals and targets data [KB1191233].
   - Don't modify the names in the header row of the spreadsheet because the data is imported to the respective fields in the goal and target tables based on the header title of each column.

5. Click **Submit**.
6. On the Progress page, click **Run Transform**.
7. On the Specify Import set and Transform map page, click **Transform**.
8. Click **Transform history** and verify that the State column is set to **Complete** in the Import Set Runs related list.
   Depending on the option that you selected from the Import set table drop-down list, your goals or targets data is imported to the Goal [sn_gf_goal] or Target [sn_gf_goal_target] tables.

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If the job is failed, click **Transform history** and refer to the details.

Note:
The Import operation can be used for inserting new data or updating the existing data in the tables. By default, the Name and Owner values are the primary keys used for updating the existing records. You can also add additional fields as primary key for inserting new data or updating the existing data. For details on how to add additional fields as primary key, see Import goals and targets data [KB1191233].

Update a schedule job to automate Actual value of the targets

Use the Goal Framework for SPM application to modify the run time for the scheduled job according to your preference to auto-update the actual value of the targets for which a target source has been configured.

Before you begin
Role required: sn_gf.goal_admin

About this task
By default, the scheduled job runs daily at 00:00:00 AM (System Time Zone).

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Search for and click the **Update Actual value of the targets using Goal Framework for SPM** scheduled job.
3. Ensure that the **Active** check box is selected to run the job at a scheduled time.
4. Edit the details of the **Run** and **Time** fields according to your preference.
5. Click **Update**.
   To learn more about scheduled jobs, see Scheduled jobs.

Migrate target breakdowns

After upgrading to Strategic Planning v4.3.2 or later, run the **Migrate BreakdownInterval To Checkinfrequency** scheduled job to migrate the existing values from the **Review frequency** field to the **Check-in frequency** field in the target records.

About this task
After running the job, the value in the **Check-in frequency** field for a target is populated based on the existing value in the **Review frequency** field of the target. If the existing value in the **Review frequency** field was set to any option other than **None**, then target breakdowns will be created for such targets based on the value in the existing check-in frequency of the target. For more information on how these values are migrated for targets with different values, see Target breakdowns migration.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Search for and select the **Migrate BreakdownInterval To Checkinfrequency** scheduled job.

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3. On the Scheduled Script Execution form, ensure that the frequency is selected as **On Demand** in the **Run** field.
4. Select **Execute Now**.

Target breakdowns migration

As an administrator, when you run the **Migrate BreakdownInterval To Checkinfrequency** scheduled job, the existing values in the **Review frequency** and **Breakdown interval** fields are migrated to the **Check-in frequency** field in the target records.

The value in the **Actuals to date** field for the target and values in the **Planned target value** and **Actual** fields for the target breakdowns are populated based on the current actual value of the target and values in the existing target breakdowns.

Target breakdowns migration for targets with breakdown interval set to None

After running the job, the value in the **Check-in frequency** field for a target is populated based on the existing value in the **Review frequency** field of the target. If the existing value in the **Review frequency** field was set to any option other than **None**, then target breakdowns will be created for such targets based on the existing review frequency of the target. Even though **Breakdown interval** was set to **None** for a target, target breakdowns will be created for the target based on the existing review frequency of the target.

The following table describes how the check-in frequency value is populated for targets with different values in the **Review frequency** and **Breakdown interval** fields.

Target breakdowns migration with breakdown interval set to None

Review frequency (Before upgrade)	Breakdown interval (Before upgrade)	Check-in frequency (After upgrading and running the job)
Yearly	None	Yearly
Quarterly	None	Quarterly
Monthly	None	Monthly
Fortnightly	None	Fortnightly The Fortnightly option is retained and no target breakdowns will be created because the Fortnightly option is no longer supported. After the owner or a contributor of the target updates the check-in frequency for the target, the target breakdowns will be created accordingly.
Weekly	None	Weekly
Daily	None	Daily
None	None	None

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Target breakdowns migration with breakdown interval set to None (continued)

Review frequency (Before upgrade)	Breakdown interval (Before upgrade)	Check-in frequency (After upgrading and running the job)
		In this case, no target breakdowns will be created.

For example, consider a scenario where details of a target are as follows before upgrade:

- The base value and target value of the target is 0 and 100, respectively
- The review frequency is set to **Monthly** and Breakdown interval was set to **None**
- The start date and end date of the target are 2024-01-01 and 2024-12-31, respectively
- The current actual value of the target is 60 and the current month is August

In this case, after running the scheduled job 12 monthly target breakdowns are created for the target and the current actual value as 60 is populated in the August monthly breakdown. Also, the planned target value is populated for each breakdown.

Target breakdowns migration for targets with breakdown interval set to Quarterly or Yearly

After running the job, the value in the **Check-in frequency** field for a target is populated based on the existing value in the **Review frequency** field of the target. Then, target breakdowns are created for the targets based on the existing review frequency of the target.

The following table describes how the check-in frequency value is populated for targets with different values in the **Review frequency** and **Breakdown interval** fields.

Target breakdowns migration with breakdown interval set to Quarterly or Yearly

Review frequency (Before upgrade)	Breakdown interval (Before upgrade)	Check-in frequency (After upgrading and running the job)
Quarterly	Quarterly	Quarterly
Quarterly	Yearly	Quarterly

Note:
For targets with breakdowns interval set to Yearly, irrespective of the target is of type cumulative or non-cumulative, after running the scheduled job quarterly target breakdowns will be created and the Target value distribution is set to **Spread linearly across the time period (cumulative)** for the target.

For example, consider a scenario where details of a target are as follows before upgrade:

- The base value and target value of the target is 0 and 80, respectively
- The review frequency is set to **Quarterly** and Breakdown interval was set to **Yearly**
- The start date and end date of the target are 2023-01-01 and 2024-12-31, respectively
- The target is of type non-cumulative
- The actual value achieved in each quarter is 10 starting from Q1-2023 till Q2-2024
- The current total actual value of the target is 60 and the current quarter is Q2-2024

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In this case, after running the scheduled job 8 quarterly breakdowns are created and the Target value distribution is set to **Spread linearly across the time period (cumulative)** for the target. The current actual value for Q1-2023, Q2-2023, Q3-2023, Q4-2023, Q1-2024, and Q2-2024 quarterly target breakdowns are populated as 10, 20, 30, 40, 50, and 60, respectively. Also, the planned target value is populated for each breakdown.

Migrate goal relationships for assigned entities

Migrate the existing goal relationship data from the Goal Relationship [sn_gf_goal_m2m_relationship] table by running the scheduled job.

Before you begin

Role required: admin

About this task

- If you've upgraded from Alignment Planner Workspace v4.1.1 or v5.0.1 to Strategic Planning v2.0.1 and have created m2m relationship with lens entities other than **Company**, **Business Unit**, **Department**, and **Portfolio**, you can migrate those lens entities from the Goal Relationship [sn_gf_goal_m2m_relationship] table to the Goals table to access and manage the goals for those lens entities in the respective portfolio plans.
- Migrating goal relationships data for assigned entities is a one-time job, and not meant to be on a schedule.
- Running the job populates the **Assigned entity type** and **Assigned entity** fields on the Goal form based on the data in the Goal Relationship [sn_gf_goal_m2m_relationship] table if you have any customized lenses other than the lens entity types, **Company**, **Business Unit**, **Department**, and **Portfolio**.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Search for and click the *`Migrate goal relationships for assigned entities`* scheduled job.
3. On the Scheduled Script Execution form:

   a. Ensure that the frequency is selected as **On Demand** in the **Run** field.

   b. In the **Run this script** field, list the entities configured in the Goal Assigned Entity Configuration [sn_gf_assigned_entity_config] table that you want to migrate the goal relationship data for.
   For parameters information, see Scheduled Script Execution form.

4. Click **Execute Now**.

Configuring target source for target automation

Configure target sources for target automation so that the goal user can define a target source when setting a target for the goal. Defining a target source for a target updates the actual value of the target automatically.

Use the following steps as guidelines for configuring target sources.

1. Create a target source for a target to configure it as a source to update the actual value of the target. For more information, see Create a target source.

   The context variable is required for target source types Assessment/Survey and PA Indicator. The mandatory context variables are automatically created while creating a target source with

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the type selected as Assessment/Surveys or PA Indicator. For more information on when the mandatory context variables are created, see Context variable in target source.

2. If required, create context variables for the target source so that the required data is fetched from the context variables to update the actual value of the target. For more information, see Create context variables for a target source.

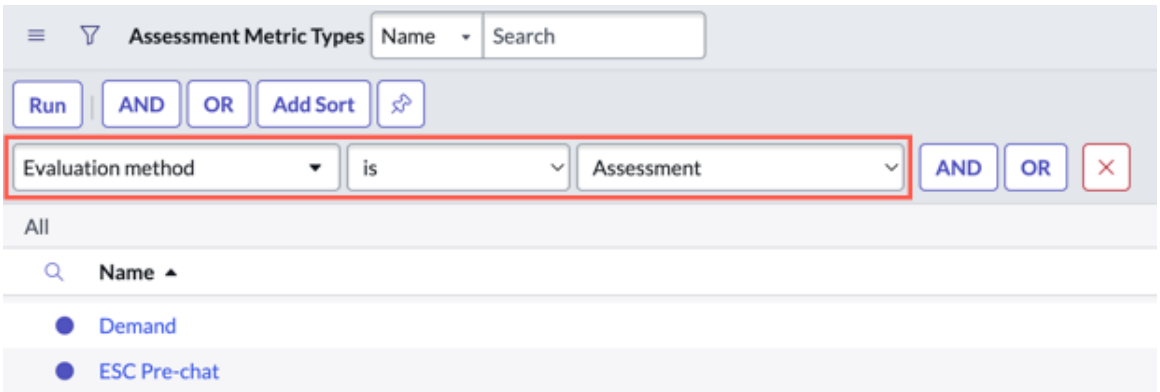
Context variable in target source

The context variable is an additional configuration for the target source that can be used on the Target form to fetch the required data and auto-update the **Actual value** field on the Target form. A context variable is required for target source types Assessment/Survey and PA Indicator.

The context variable is automatically created (with the **Mandatory** field set to **true** on the context variable form) for the target source (of type Assessment/Survey and PA Indicator) when the Goal Framework for SPM scope is selected before creating a target source. The context variables created automatically are also known as mandatory context variables.

The mandatory context variables are created when you've selected the Goal Framework for SPM scope and you've met one of the following conditions:

- (For target source type, Assessment/Survey) On the Target Source form, the **Type** field is set to **Assessment/Survey** and the **Assessment Metric Types** field is populated with a metric type of **Evaluation method = Assessment**.



- (For target source type, PA Indicator) On the Target Source form, the **Type** field is set to **PA Indicator** and the value populated in the **Breakdown** field isn't of Choice list type.

  To create a context variable for the target source type, PA Indicator, where the Breakdown field is of Choice list type, see Create a context variable for the target source type PA Indicator.

Note:
Mandatory context variables can't be deleted.

You can also create context variables manually for a target source and use them to configure for fetching the required data and auto-updating the **Actual value** field on the Target form. For more information on how to create a context variable manually, see Create a context variable for a target source.

Create a target source for automating the Actual value of the targets

Create a target source so that the goal user can configure it for the targets to automate the Actual value of the targets.

Before you begin
Select the Goal Framework for SPM scope for the application.

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Role required: sn_gf.goal_admin

About this task

The context variable is required for target source types Assessment/Survey and PA Indicator. The mandatory context variables are automatically created while creating a target source with the type selected as Assessment/Surveys or PA Indicator. For more information on when the mandatory context variables are created, see Context variable in target source.

Procedure

1. Navigate to **All** > **Enterprise Goal Management** > **Target Sources**.
2. Click **New**.
3. On the form, fill in the fields.
   For a description of the field values, see Target Source form.
4. Click **Submit**.

Create a context variable for a target source

Create a context variable manually if you want to configure more context variables for a target source.

Before you begin

Select the Goal Framework for SPM scope for the application.

Role required: sn_gf.goal_admin

About this task

The Context variable provides information that can be used to fetch the required data and auto-update the Actual value on the target form. After a context variable is created for the target source, the goal user can configure the Actual Value Source Configuration section on the Target form so that the Actual value gets auto-updated.

Creating a context variable is similar to creating a column on a table.

To create a context variable for the target source type PA Indicator and the breakdown is of Choice list type, see Create a context variable for the target source type PA Indicator.

Procedure

1. Navigate to **All** > **Enterprise Goal Management** > **Target Sources**.
2. Open the required target source that you want to create a context variable for.
3. In the Context Variables related list, click **New**.
4. On the form, fill in the fields.
   For a description of the field values, see Context Variable form.
5. Click **Submit**.

Create a context variable for the target source type PA Indicator

Create a context variable manually for the target source type PA Indicator if the breakdown is of Choice list type.

Before you begin

Select the Goal Framework for SPM scope for the application.

Role required: sn_gf.goal_admin

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About this task

The context variable provides information that can be used to fetch the required data and auto-update the Actual value on the Target form. After a context variable is created for the target source, the goal user can configure the Actual Value Source Configuration section on the Target form for the Actual value to get auto-updated.

Creating a context variable is similar to creating a column on a table.

Procedure

1. Navigate to **All** > **Enterprise Goal Management** > **Target Sources**.
2. Open the required target source that you want to create a context variable for.
3. In the Context Variables related list, click **New**.
4. On the form, fill in the **Type** field as Choice and the other fields as needed.
   For a description of the field values, see Context Variable form.
5. Click **Submit**.
   A context variable of choice type is created.
6. In the Choices related list of the context variable you created, click **New**.

   Note:
   If you don't see the Choices related list on the Context Variable form, add it by navigating to **Configure** > **Related Lists** on the form.

7. On the form, fill in the fields.

Choice form

Field	Description
Table	Name of the context variable for which the choice is created.
Element	Column name in the context variable form for which the choice is created.
Label	Name of the choice.
Value	Sys_id of the choice value for which the context variable is created. You can copy the sys_id from the Choices related list of the Dictionary Entry [sys_dictionary] table.

8. Click **Submit**.
9. **Optional:** Repeat the steps 6 through 8 to create more choices for the context variable.

What to do next

The goal user can configure these choices as context variables on the Target form for which the target source is configured.

Defining a custom unit of measure

Defining a custom unit of measure helps the goal users to set the unit of measure for targets as per their choice. Unit of measures are two types, quantitative and qualitative.

By default, the available unit of measures for quantitative targets are **#**, **$**, **%**, **Days**. By default, the available unit of measure for qualitative targets is **Yes/No**.

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As an administrator, you must create custom unit of measures so that the goal user can use them for setting a unit of measure for their targets:

- For quantitative targets, you can define a custom unit of measures from the Unit [sn_gf_unit] table.
- For qualitative targets, you must first create a choice set and then create a choice list for the choice set.

Prioritization display settings in Strategic Planning

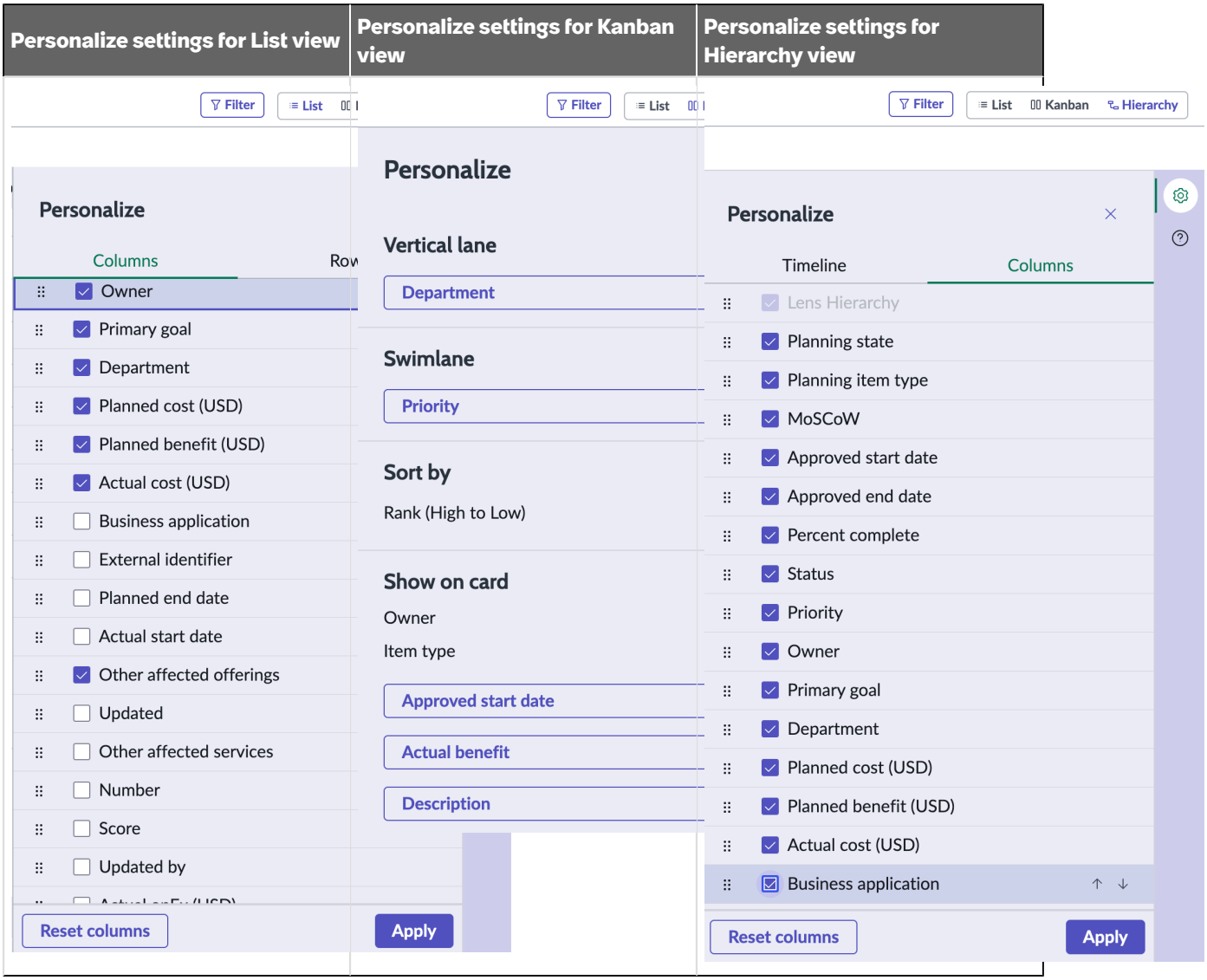
Configure the way data is shown on the Prioritization tab of the workspace so that your planning managers view the information that is relevant for them.

Configuring additional columns for Prioritization in Strategic Planning

Customize the default column configuration for the Prioritization page of your portfolio plan so that your planning managers can select the appropriate data points they need.

Portfolio managers or product owners can show or hide the data for their planning items by using the Personalize side panel in the Prioritization page of their workspace. By default, this side panel of List and Hierarchy views provides all the default fields available for that planning item. If your planning managers want to see additional columns, for example, there could be a requirement of information from a dot-walked field. In such cases or to remove any existing choices, you can configure them using the admin role.

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Add extra columns as choices to this side panel or remove any of the default column choices by updating the list layout configuration for the planning item types associated to the portfolio plan.

- If the portfolio plan has multiple item types associated to it, update the view configuration of the Planning Item [sn_align_core_planning_item] table.
- If the portfolio plan has a single item type associated to it, update the view configuration of the relevant table.

From the form view of the identified table, change the view to **APW Prioritization**, and update the list layout. For the detailed procedure of updating the layout configuration for a list, see Configure the list layout.

Note:
List v3 is no longer available for new deployments. If you are already using list v3, you may continue to do so, but in this case some of the functionalities might not be available.

Customizing highlighted fields on prioritization page of Strategic Planning Workspace

Customize the fields to be highlighted on the Prioritization page of a portfolio plan according to your planning manager's needs.

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By default, the List and Hierarchy views of the Prioritization page of a portfolio plan highlight the **Planning state** and **Status** fields of a planning item with colors. Based on your planning manager's requirements, you can configure fields that are of Choice type, such as Owner or Priority to also be the highlighted columns on the page. This customization requires:

- Modifying the Prioritization view Script Includes (APWBacklogConfigImpl for List view and APWGanttConfigImpl for Hierarchy view).
- Configuring a new record for the required field in the sys_highlighted_value table.

Modify Script Includes for Prioritization page in Strategic Planning

Modify the Script Includes for List and Hierarchy views of the Prioritization page to change the columns to be highlighted in these views in the workspace.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Script Includes**.
2. From the list, select one of the following:
   - For List view, select APWBacklogConfigImpl
   - For Hierarchy view, select APWGanttConfigImpl
3. Update the column name in the **Script** field of the Script Include.

   In the *`getColumnsForHighlightedValues`* function, update the return value to the desired column.

   For example, if you want to highlight the Priority column, update the return value to `("planning_state", "state", "priority")`.
4. Select **Submit**

What to do next

Create new highlighted values for Prioritization columns in Strategic Planning

Create new highlighted values for Prioritization columns in Strategic Planning

Customize the fields to be highlighted on the Prioritization page of a portfolio plan according to your planning manager's needs.

Before you begin

Modify Script Includes for Prioritization page in Strategic Planning.

Role required: admin

Procedure

1. Navigate to **Workspace Experience** > **Administration** > **Highlighted Values**.
2. Select **New**.
3. On the form, fill in the fields.
   For field information, see Highlighted Value form.
4. Save the form.
5. In the Highlighted Value Conditions related list, create records to configure the color, order, and icon for each of the field values that you want to be highlighted in the workspace.

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a. Select **New**

b. On the form, fill in the fields.
For field, information, see Highlighted Value Condition form.

c. Select **Submit**.

6. Repeat step 5 to complete this configuration for all the field values.
For example, if you are configuring for status column, you must create three records in the Highlighted Value Conditions related list for each of the choices Red, Green, and Yellow.
7. Select **Update**.

Modify Script Includes for milestone icons in Strategic Planning

Modify the Script Includes for milestone icons in the roadmap and portfolio plan to customize the icons displayed in the Roadmap tab in the workspace.

Before you begin

Role required: admin

Procedure

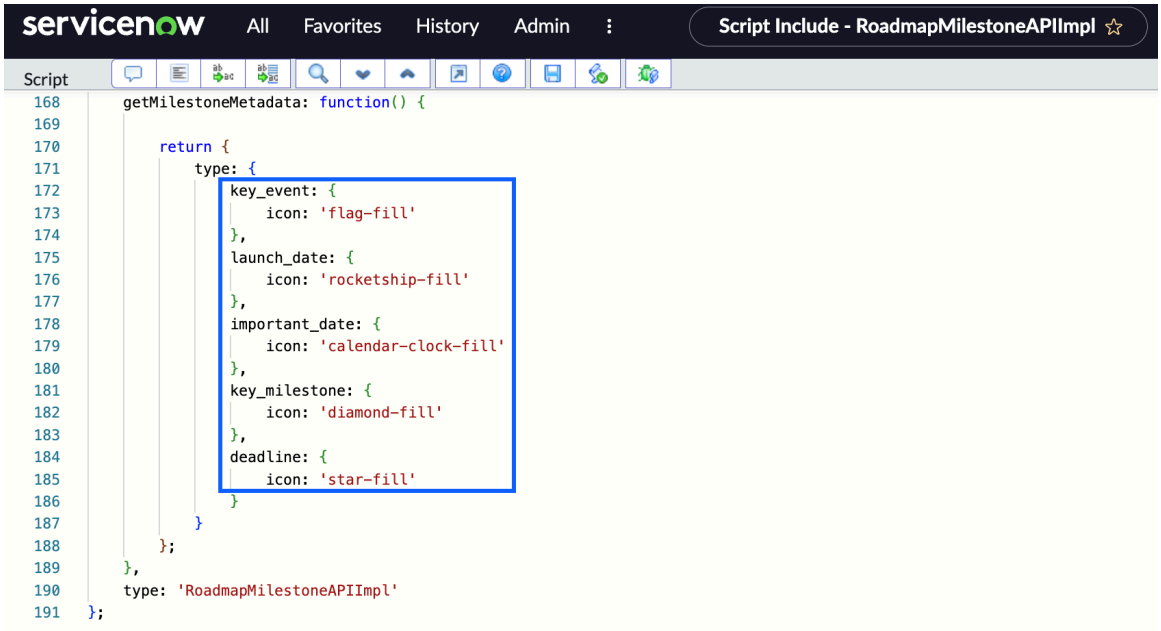
1. Navigate to **All** > **System Definition** > **Script Includes**.
2. From the list, select RoadmapMilestoneAPIImpl.
3. Update the milestone icon type in the **Script** field of the Script Include.
In the *getMilestoneMetadata* method, update the return value to the required icon.

   For example, if you want to display the Circle exclamation icon () for key event milestone, update the return value to `'circle-exclamation-outline'` for the key_event milestone.

   The default icons are as follows:

   - key_event: `'flag-fill'`
   - launch_date: `'rocketship-fill'`
   - important_date: `'calendar-clock-fill'`
   - key_milestone: `'diamond-fill'`
   - deadline: `'star-fill'`

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4. Select **Update**.

Update the display limit of items on Prioritization and Roadmap

Create a system property to update the display limit of the items shown in Prioritization and Roadmap views in Strategic Planning Workspace.

Before you begin

Ensure the application scope in your instance is set to Global.

Role required: admin

About this task

The default display limit for Prioritization and Roadmap pages are:

- Planning items shown in the prioritization view = 250
- Roadmap items shown in the roadmap view = 250
- Goals shown in the hierarchy view =250
- Item-level milestones in the roadmap view = 100
- Items shown in all the Kanban views = 250
- Lanes shown in all the Kanban views = 30

If the total number exceeds these default limits, the additional number of planning items, milestone indicators, and vertical lanes are not visible in the workspace. To overwrite this default setting, create a system property and set its value to a desired limit of display.

Important:
If the value of a system property exceeds its default value, the UI performance can degrade.

Procedure

1. Navigate to **All** > **System Properties** > **All Properties**.
   A list of all the properties in the System Properties [sys_properties] table appears.
2. Click **New**.
3. On the form, fill in the fields.

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For information on the other form fields, see the field description table in Add a system property.

4. Select **Submit**.

Configure additional source tables for a free-form roadmap

Add new tables to roadmap preferences and configure their details so that these tables can be used as source tables while creating a free-form roadmap in Strategic Planning.

Before you begin

Install Strategic Planning.

Role required: sn_align_core.apw_admin

Procedure

1. Navigate to **All** > **Strategic Planning** > **Portfolio Plan Configuration**.
2. Select **New**.
3. On the form, fill in the fields.

   For field information, see Portfolio plan configuration form.

4. Select **Submit**.

Customize the planning item display preferences for Prioritization and Roadmap

Update the default display configuration of planning item attributes in Prioritization, portfolio plan Roadmap, and Free-form roadmap pages so that data relevant to you is displayed in Strategic Planning Workspace.

Before you begin

Install Strategic Planning.

Role required: sn_align_core.apw_admin

About this task

Update default settings for the display of planning items such as Group by fields, Color by fields, Metrics fields, and Kanban preferences, such as default vertical lane and horizontal lane, metrics on the Kanban cards and others, on the following pages:

- Portfolio plans:
  - Prioritization Kanban view
  - Roadmap timeline view
  - Roadmap kanban view
- Free-form roadmaps:
  - Timeline view
  - Kanban view

The options in these configurations are as follows:

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Table Configurations

Configuration table	Fields
Roadmap timeline configuration	• Group by fields • Color by fields • Metrics fields • Status field • Percent complete field
Kanban configuration	Prioritization, roadmap, and free-form roadmap tabs: • Horizontal lane • Vertical lane • Metrics on Kanban card
Rank configuration	Rank configuration

Procedure

1. Navigate to **All** > **Strategic Planning** > **Portfolio Plan Configuration**.
2. Open a table for which you want to edit the configuration.
3. Edit the required fields.
   For field information, see Portfolio plan configuration form.
4. Select **Update**.

Hierarchy view display configuration in Strategic Planning

Show or hide parent records of planning items shown in the Hierarchy view for high-level and regular portfolio plans by configuring system properties.

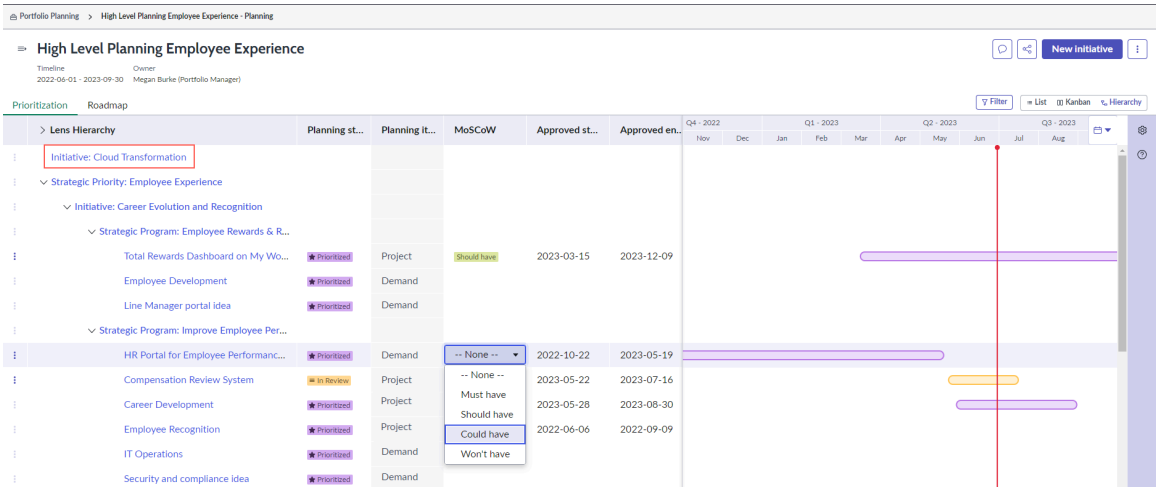
Display empty parent entities in the Hierarchy view

In the Hierarchy view of the Prioritization tab, the parent records are displayed only if they have any associated planning items.

For example, a portfolio plan built from the Organization lens (Company > Business Unit > Department) is used to manage and track plans for Demands and Projects. So, when you switch to the Prioritization Hierarchy view, only those departments that have at least one Demand or Project associated with it are shown in the view.

If you want to see other departments that are included in this portfolio plan but have no planning items associated to them, work with your administrator to create the system property *sn_align_ws.gantt_hide_empty_entities* and set it to **false**.

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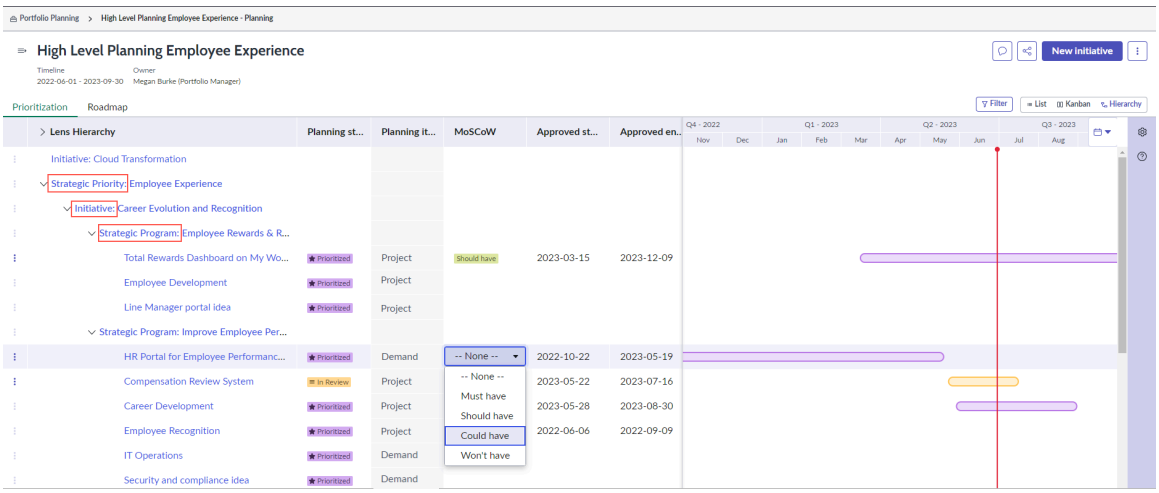


Display complete hierarchy for high-level portfolio plans

For high-level portfolio plans, the Hierarchy view by default shows only the hierarchy up to the parent level.

For example, a portfolio plan built from the Strategic Investment lens (Company > Strategic priority > Initiative > Strategic program) is used to manage and track plans for strategic programs. So, when you switch to the Prioritization Hierarchy view, only Strategic Priority > Initiative levels are shown by default.

If you want to see the whole hierarchy of Strategic priority > Initiative > Strategic program > planning items, work with your administrator to create the system property **true**.



Configure scenario planning in Strategic Planning

Configure scenario planning in strategic planning to create and compare multiple scenarios.

1. Enable or disable scenario planning.

   For more information, see Enable or disable scenario planning in Strategic Planning.

2. Manage financial widgets in compare scenarios page.

   For more information on how to add and manage widgets to the comparison view, see Configure financial widgets in compare scenario.

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Enable or disable scenario planning in Strategic Planning

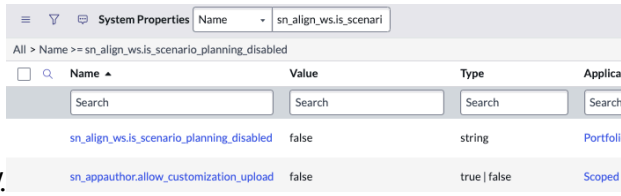
Enable or disable scenario planning in Strategic Planning.

Before you begin
Role required: admin

About this task
Scenario planning is enabled by default. Use the following steps to disable or enable scenario planning, as required.

Procedure

1. Navigate to **All> System Properties**.
2. Search for the property



sn_align_ws.is_scenario_planning_disabled.

3. Verify the value of the property.
   - To enable scenario planning, verify that the property is set to **False**.
   - To disable scenario planning, verify that the property is set to **True**.

What to do next
Create a scenario in Strategic Planning

Configure financial widgets in compare scenario

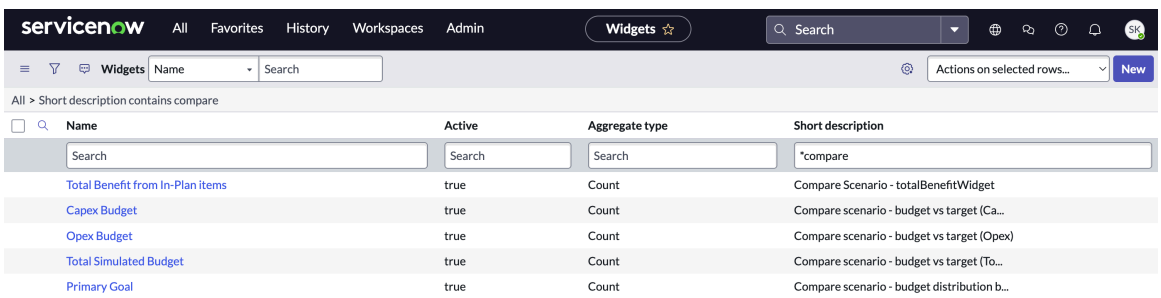
Add or manage existing widgets to view financial insights while comparing scenarios. Define your own attribute from the cost types to view it's details in the Compare scenario page.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Project Administration** > **Widgets**.
2. In the Widgets list, filter the Short description with **Compare scenario** to view the existing list.

   By default, there are five financial widgets enabled to compare the financial performance of scenarios.



3. Edit an existing widget or create a widget to use it in scenario planning.

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4. Select **Submit**.

Capacity configuration in Strategic Planning

Generate employee profiles for resources and map them with primary attributes to start capacity planning.

- Enable the planning attributes for capacity to map resources to a unique attribute. For more information, see Enable planning attributes for Capacity in Strategic Planning.
- Create resource assignments and generate employee profiles. For more information, see Generate employee profiles for resources to work with Capacity.
- Map resources to a unique group, role, and skill to generate employee profiles. For more information, see Map primary attributes to resources.

Enable planning attributes for Capacity in Strategic Planning

Enable the planning attributes Group, Skill, and Role so that your planning managers can view the resource capacity details.

Before you begin

Role required: admin

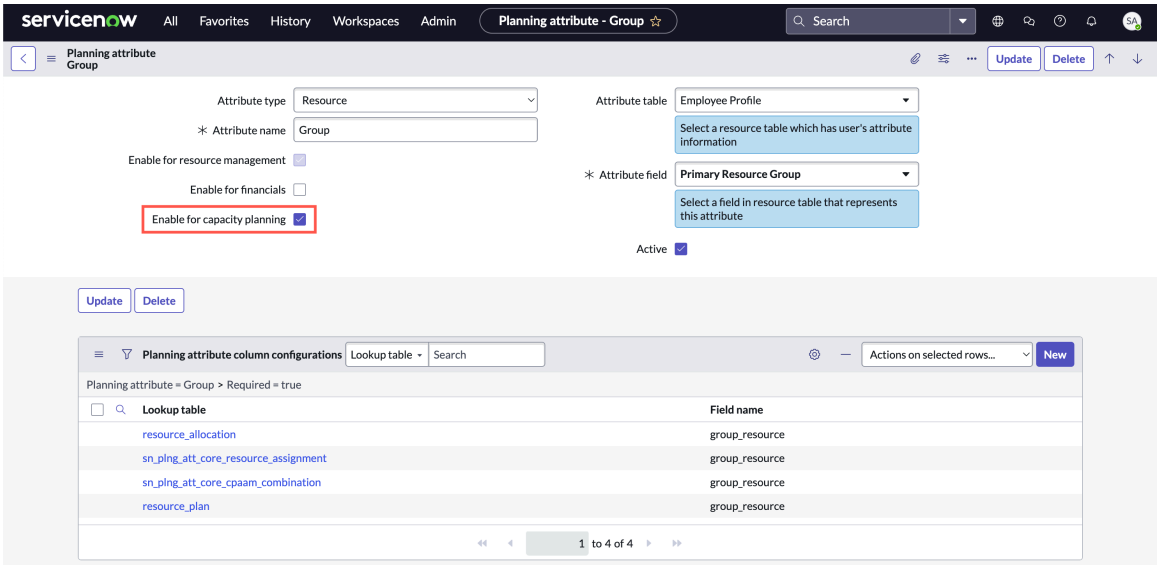
Note:
This activation is a one-time task to enable planning attributes to plan and work on resource capacity.

Procedure

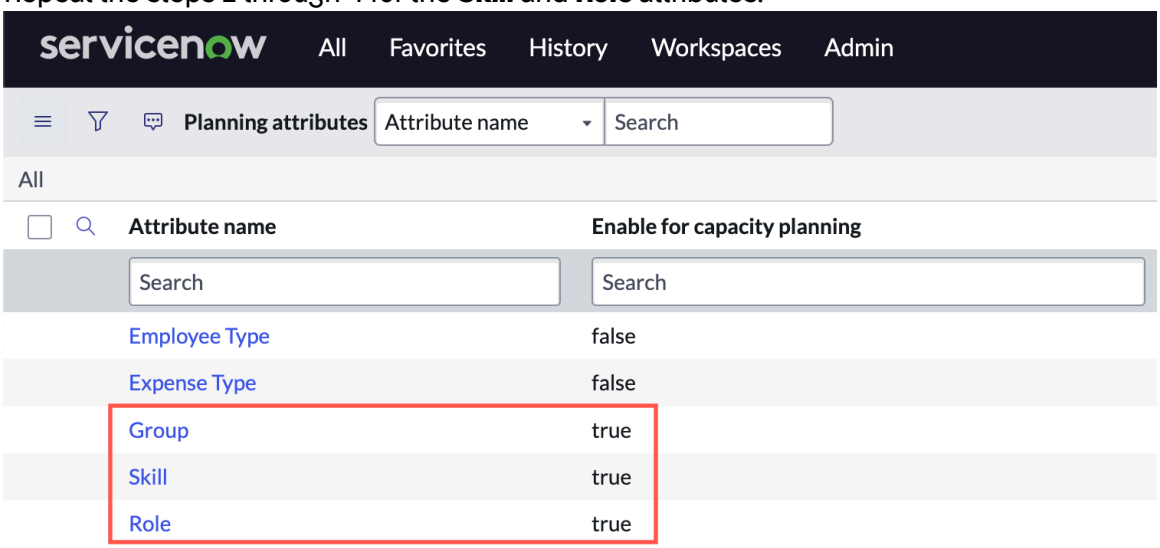
1. Navigate to **All** > **Strategic Planning** > **Planning Attributes**.
2. Filter the Attribute name to locate and open the **Group** attribute.
3. Select the **Enable for capacity planning** option.
4. Select **Update**.

Note:
If an attribute is enabled for capacity planning, it is enabled for resource management by default.

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5. Repeat the steps 2 through 4 for the **Skill** and **Role** attributes.



You can create custom attributes and map them to resources. For more information, see Create or edit planning attributes.

6. Set the value of the Enable for capacity planning column for Group, Role, and Skill field to **true**.

What to do next

1. Configure attribute values: Navigate to **All** > **Strategic Planning** > **Planning Attributes** to view and manage attribute values. You can add, edit, or import attribute entries for Group, Skill, and Role.
2. Map attributes to resources: Assign the enabled planning attributes to your resources so they appear in capacity views. For custom attributes, see Create or edit planning attributes.
3. Start capacity planning: Navigate to the Capacity tab in your *`Strategic Planning Workspace`* to view resource capacity based on the enabled attributes.

Generate employee profiles for resources to work with Capacity

Generate employee profiles for the resources to map against primary attributes.

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Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Employee Profile** > **Employee Definition**.
2. Filter the name to locate and open the **sys_user** table.
3. In the Employee Definition page, select **User** from the Table list.
4. Use the condition builder to filter the required resources and then select the update count icon ().
5. Select **Generate Employee Profiles** (Generate Employee Profiles).
6. In the Generate Employee Profiles window, select **Proceed**.

Result
Employee profiles for the selected resources are generated.

What to do next
Populate a primary group, primary role, and primary skill for the resources with employee profiles. For more information, see Map primary attributes to resources.

Map primary attributes to resources

Locate and map the primary group, primary role, and primary skill for the resources associated with existing employee profile tables.

Before you begin
Generate employee profiles for resources to work with Capacity.

Role required: admin

Procedure
1. Navigate to **All** > **Employee Profile** > **Employee Profiles**.
2. Filter the User column to locate and open the resources with employee profiles.
3. Select the **Populate primary resource attributes** related link to auto-populate the attributes.
   - If an employee is assigned to a single group, role, and skill, the primary attributes are populated.
   - If an employee is assigned to multiple groups, skills, or roles, select the **Primary Resource Group**, **Primary Resource Role**, and **Primary Resource Skill**, using the lookup icon.
4. Select **Update**.

Activate a scheduled job to automatically generate resource capacity

Activate the scheduled job to auto-generate the resource capacity at required cadence.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Filter the name field to locate and open **Generate Resource Capacity**.
3. Select **Active** option to activate the schedule job.

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4. Edit the fields on the Scheduled Script Execution form to customize the job and meet your requirements.
   For more information about the field description and scripts, see Automatically run a script of your choosing.
5. Select **Execute Now** to execute the scheduled job or select **Update** to save your changes.

Configure financials for Strategic Planning

Configure the ServiceNow Internal integrations to view the financials for planning items in Strategic Planning.

Before you begin

Role required: admin

Procedure

1. Configure the attributes to generate labor costs in financials based on the resource assignments on the work items.
   For more information, see Planning attributes and Create or edit planning attributes.
2. Generate default mapping configurations to create table maps.
   For more information, see Generate default mapping configurations.
3. Enable financials for epics to work on financial planning.
   For more information, see Enable financials for planning items in Strategic Planning.
4. Create new widgets to view the rolled up financial data at planning item level.
   For more information, see Configure a widget and associate it with project.
5. **Optional:** Customize the left pane in the financials screen to match the requirements of your organization.
   For more information, see Customize the left pane view for financials.
6. **Optional:** Customize the Create cost plan form fields to match the requirements of your organization.
   For more information, see Customise cost plan form.
7. Customize the default expense types to manage cost plans for your planning items.
   For more information, see Change the default expense type for your planning items
8. Define a custom prefix for your baseline name.
   For more information, see Create a custom prefix for baseline.
9. Activate and define scheduled job to automatically migrate budget for your planning items.
   For more information, see Activate a scheduled job to migrate budget of your planning items.
10. Activate and define a scheduled job to migrate financial baselines for your planning items.
    For more information, see Migrate financial baselines to Next Experience.
11. Activate and define scheduled job to automatically create financial baselines for your planning items at a defined cadence.
    For more information, see Activate scheduled job to create financial baselines for planning items.
12. Activate and define scheduled jobs to automatically generate labor costs for your planning items based on the attribute-based resource assignments at a defined cadence.
    For more information, see Activate scheduled jobs to generate labor costs for your planning items.

Enable financials for planning items in Strategic Planning

EActivate financials for all the planning items to work on the financial estimates.

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Before you begin
Role required: sn_invst_pln_v2.investment_admin

Procedure

1. Navigate to **All** > **Investment Funding** > **Setup** > **Investment Entities**.
2. Filter the Table field to locate and open the required planning item.
   For example, select **sn_align_core_scrum_epic** for epics, select **pm_project** for projects, **dmn_demand** for demands, **sn_align_core_capability** for capabilities, or **sn_align_core_feature** for features.
3. In the Entity form, build the required condition to get the required planning items.

   Note:
   If you want to work on the finanical records for completed or closed planning items, remove the **Active is true** condition.

4. Select **Update**.

Enable financial budget allocation for planning items in Strategic Planning

Enable allocation property after migrating to Next Experience to work on budget allocation for your planning items using Strategic Planning.

Before you begin

- For new customers accessing financials in Next Experience, this property is enabled by default.
- Role required: admin

Procedure

1. Navigate to **All** > **System Properties** > **Properties**.
2. Filter the Name column to locate and open **sn_invst_pln.enable_budget_allocation_v2** property.
3. Update the Value field to **True** and select **Update**.

What to do next
Configure budget attributes to work on managing budget of your planning items. For more information, see Configure budget attribute at instance-level to allocate budget.

Configure budget attribute at instance-level to allocate budget

Configure the budget attribute by expense type or cost type as an instance-level to work on budget allocations for your planning items using Strategic Planning.

Before you begin

- Enable the budget allocation property to work on budgeting for planning items. For more information, see Enable financial budget allocation for planning items in Strategic Planning.
- Role required: admin

Important:
Existing customers can't change the budget attribute to cost_type.

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Procedure

1. Navigate to **All** > **System Properties** > **Properties**.
2. Filter the Name column to locate and open **sn_invst_pln.budget_allocation_attribute** property.
3. Update the Value field to one of the following.
   - **cost_type** - view financials by cost types such as Hardware Opex, External labor Capex, Software Capex, Software Opex.

     Note:
     It's suggested to limit the number of cost types to four.

   - **expense_type** - view financials by expense types such as Capex and Opex.
4. Select **Update**.

Enable monetary benefit plans for planning items

Enable the benefit plans property to create and manage benefit plans for planning items.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Properties** > **Properties**.
2. Filter the Name column to locate and open the **sn_invst_pln.enable_benefit_plan_in_new_financials** system property.
3. In the **Value** field, enter **true**.
4. Select **Update**.

Add monetary and non-monetary benefit plans related lists

Enable the monetary benefit plans and non-monetary benefit plans related lists for your planning item types such as Epics, Features, and Capabilities.

Before you begin

- This is a one time activity to enable and view the monetary benefit plans and non-monetary benefit plans related list for all the planning items.
- Role required: admin

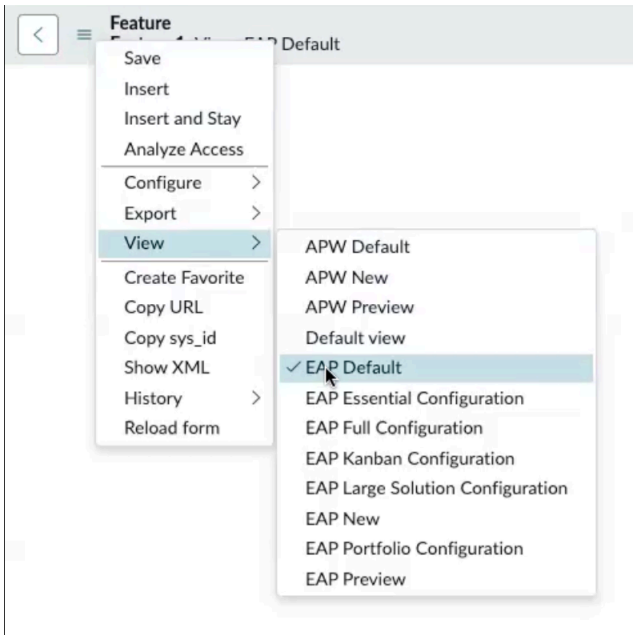
Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Filter the Label field to locate a planning item type.
   - If you want to enable the benefit plans for Feature, filter the Label field to locate and open **Feature** [sn_align_core_feature] table.
   - If you want to enable the benefit plans for Capability, filter the Label field to locate and open **Capability** [sn_align_core_capability] table.
3. Select the **Show List** related link.
4. Open a record from the list of Features or Capabilities.
5. Change the scope of the application if you don’t see the editable form of the record page.

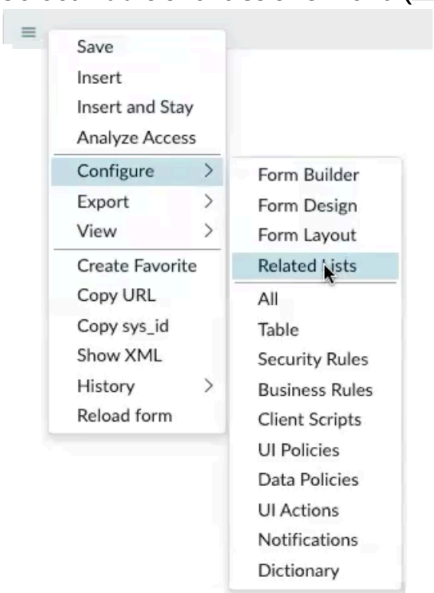
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6. Change the record page view to **EAP Default**.

   To change the view, select **Additional actions** menu ( ), select **View**, and select the **EAP Default** view.



7. Select **Additional actions** menu ( ), select **Configure**, and select the **Related Lists** option.



8. Select **Monetary Benefit Plans** and **Non-monetary Benefit Plans** from the Available list and add them to Selected list.
9. Select **Save**.
10. Select **Update** on the planning item record page.

What to do next

Create and manage monetary and non-monetary benefits plans for your planning items.

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- Create monetary benefit plans for your planning items in Strategic Planning
- Manage non-monetary benefit plans for your planning items in Strategic Planning

Configure a widget and associate it with project

Enable and associate a widget to view financial summary of work items at a high-level.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Project Administration** > **Widgets**.
2. Select **New**.
3. On the Widget New Record form, fill the fields.
   For a description of the field names, see Widget New Record form.
4. Select the **Additional actions menu** and select **Save**
5. In the Widget associations related list, select **New**.
6. On the Widget association New Record form, fill the fields.
   For a description of the field names, see Widget association form.
7. Select **Submit**.

Customize the left pane view for financials

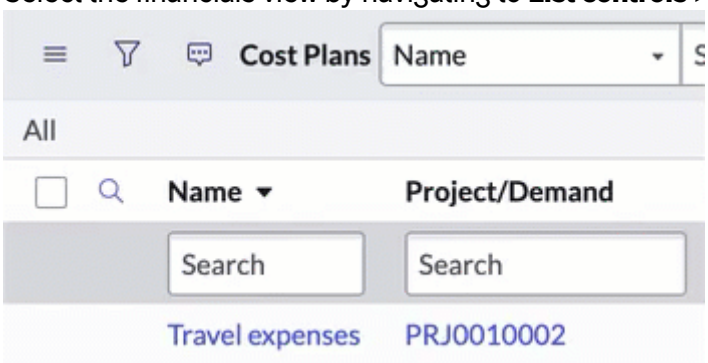
Customize the left pane for financials to view custom field information.

Before you begin

Role required: admin

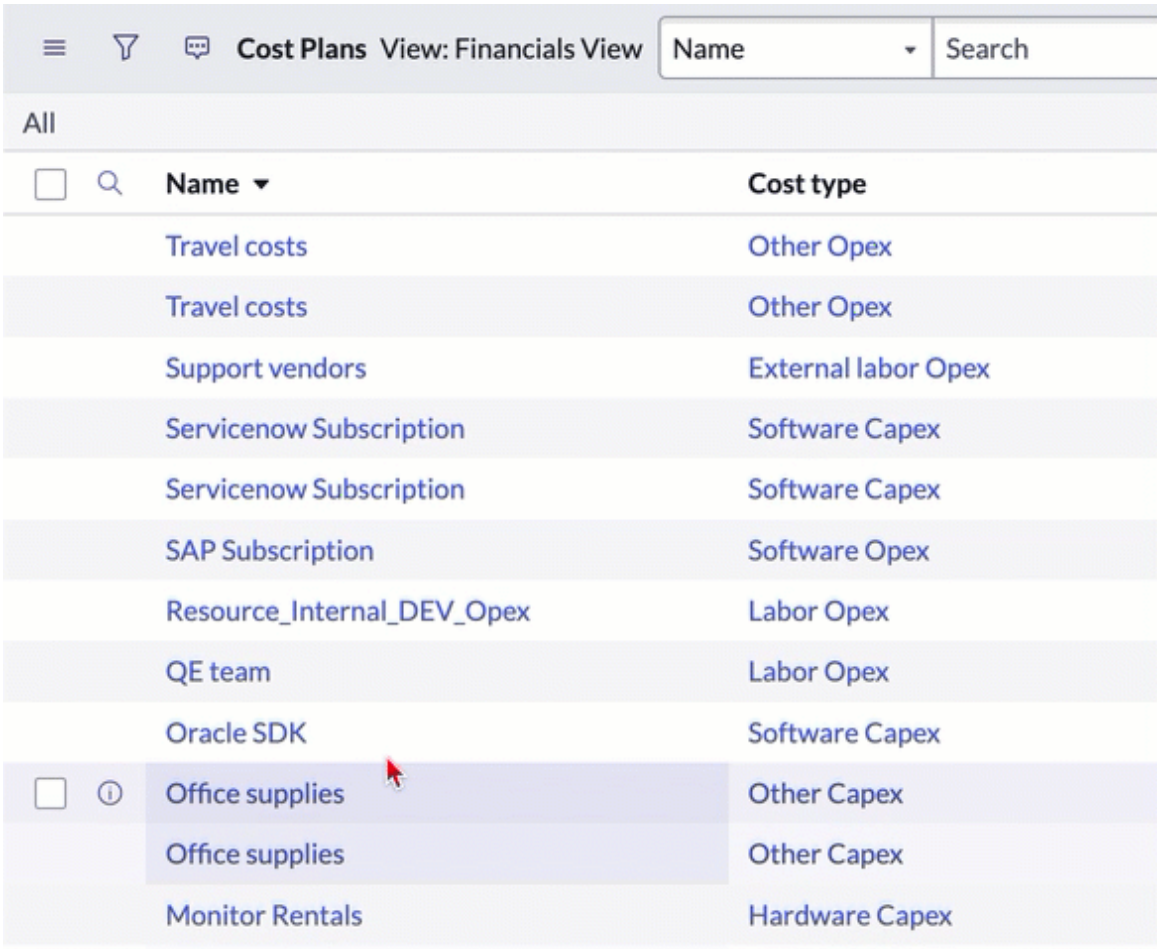
Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Filter the Label field to locate and open the **Cost Plan** table.
3. Select the **Show List** related link.
4. Select the financials view by navigating to **List controls** > **View** > **Financials View**.



   The selected view ( ) is displayed on the header.
5. Select the header options to configure list layout.

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6. Add or remove the fields in the Selected column to customize the left pane view in financials view.
7. Select **Save**.

Result
Cost plans table with customized fields for Financials View is displayed.

Customise cost plan form

Manage the fields required on the new cost plan form as per your organization needs.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **System Definition** > **Tables**.
2. Filter the Label field to locate and open the **Cost Plan** table.
3. Select the **Design Form** related link.
4. On the header row, select **Cost Plan [cost_plan]** from the table list and **Financials View** from the view list.
5. On the form, you can:
   - Drag and drop the required fields from the Fields column.
   - Remove the existing fields using the Remove field icon.
6. Select **Save**.

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Change the default expense type for your planning items

Configure the default expense type to create or edit cost plans for your planning items.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Properties** > **All properties**.
2. Filter the name to locate and open **sn_plng_att_core.default.expense_type**.
3. Change the Value field to the required expense type and select **Save**.
   Opex is the default value.

Create a custom prefix for baseline

Modify the prefix to customize the name of the baselines for your planning items.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Properties** > **All Properties**.
2. Filter the name filed to locate and open **sn_invst_pln.baseline_prefix**.
3. Modify the **Value** field to create a custom prefix for your baselines.

   If you're working on a sales portfolio, you may change the **Value** field to `Sales baseline on`.
4. Select **Update**.

Example:
Assume you are creating a baseline for a sales project using the above prefix on December 04, 2023. Name of the new baseline will be **Sales baseline on 2023-12-04**.

Create custom labor costs and map them to sys_id

Create and map custom labor costs to sys_id to generate labor costs based on the relevant expenses.

Before you begin
Role required: admin

About this task
Consider you removed the out-of-box cost types and created the following two labor cost types:

- Internal Workforce Capital Expenditure (to replace Labor Capex)
- Contractor Operational Expense (to replace External Labor Opex)

Once these new cost types are created, the system automatically assigns them unique sys_ids. These sys_ids are not same as the deleted defaults.

To ensure the system continues to recognize these new cost types for workflows, reporting, or calculations, you must manually updated in the sn_plng_att_core.labor_costtype_sysid_mapping system property with the new sys_ids.

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Omitting this update may result in system errors or incomplete data processing in cost-related operations.

Procedure

1. Create custom labor costs.
   a. Navigate to **All** > **System Definition** > **Tables**.
   b. Filter the Label field to locate the open **Cost Type Definition**.
   c. From the Related Links, select **Show List**.

      List of OOB labor costs is displayed.

   d. Select **New**.
   e. On the Cost Type Definition form, fill the fields.
      - **Name** - enter the name of the labor cost plan.

        Tip:
        Adding the cost type, either capex or opex, as a suffix to the name helps you to easily identify while creating cost plans.

      - **Expense type** - select Capex or Opex from the list to define expense.

      For example, you can create Software Capex labor cost to capture software purchasing expenses. Hardware Opex labor cost to capture your hardware purchasing expenses.

   f. Click **Submit**.

      The new cost plan is displayed on the list.

   g. Right-click on the cost plan row and select **Copy sys_id**.
2. Map the custom labor costs with sys_id.
   a. Navigate to **All** > **System Properties** > **All properties**.
   b. Filter the name field to locate and open the **sn_plng_att_core.labor_costtype_sysid_mapping** property.
   c. In the Value field, enter the labor cost type name and it's sys_id in the same format as the OOB labor costs mapping format.
   d. Select **Update**.

Example: Mappings of default out of box labor costs with their sys_id

```
{
  "labor_capex": "3d16eaf79330120064f572edb67ffb04",
  "labor_opex": "5b26eaf79330120064f572edb67ffb39",
  "external_labor_capex": "ed36eaf79330120064f572edb67ffb41",
  "external_labor_opex": "7b36eaf79330120064f572edb67ffb58"
}
```

Activate a scheduled job to migrate budget of your planning items

Activate the **Migrate budget for active demands and projects** scheduled job to migrate budget of active planning items from Classic UI to Next Experience.

Before you begin

Role required: admin

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Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Filter the name field to locate and open **Migrate budget for active demands and projects**.
3. Select **Active** option to activate the schedule job.
4. Edit the fields on the Scheduled Script Execution form to customize the job and meet your requirements.
   For more information about the field description and scripts, see Automatically run a script of your choosing.
5. Select **Execute Now** to execute the scheduled job or select **Update** to save your changes.

Activate a scheduled job to manage the expense type on resource assignments

Activate and define a scheduled job to manage expense type of resource assignments created for demands, projects, and project tasks.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Scheduler** > **Scheduled Jobs** > **Scheduled Jobs**.
2. Filter the name field to locate and open **Migrate task type planning attributes from tasks**.
3. Select **Active** option to activate and schedule the job.
4. Edit the fields on the Scheduled Script Execution form to customize the job and meet your requirements.
   For more information about the field description and scripts, see Automatically run a script of your choosing.
5. Select **Execute Now** to execute the scheduled job or select **Update** to save your changes.

Activate scheduled job to create financial baselines for planning items

Activate and define a scheduled job to automatically create financial baselines for your planning items at a required cadence.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Filter the name field to locate and open **Create Financial Baseline For Planning Items**.
3. Select **Active** option to activate the schedule job.
4. Edit the fields on the Scheduled Script Execution form to customize the job and meet your requirements.
   For more information about the field description and scripts, see Automatically run a script of your choosing.
5. Select **Execute Now** to execute the scheduled job or select **Update** to save your changes.

Activate scheduled jobs to generate labor costs for your planning items

Activate scheduled jobs to automatically generate labor costs for attribute-based resource assignments.

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Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Filter the Name field to locate and open **Generate labor costs for demands and projects** and **Generate Labor Costs For Epic** jobs.
3. Select **Active** and on the Scheduled Script Execution form, fill the fields.

   For a description of the field names, see Scheduled Script Execution form to generate labor costs for planning items.

   Note:
   You can generate the labor costs for inactive planning items. Remove `true` from the following code lines for the respective planning items to include the inactive planning items.
   - Epics: `epicGr.addQuery("active", true);`
   - Projects: `projectsGr.addQuery("active", true)`
   - Demands: `demandGr.addQuery("active", true);`
4. Select **Update** to save your changes or **Execute Now** to run the scheduled job.

Activate scheduled job to populate to multicurrency fields

Activate and execute the scheduled job to map your costs and work with multicurrency.

Before you begin

- After upgrading from classic experience to the latest version, run this job once to populate the new investment currency fields for all existing projects. The job copies values from the corresponding demand currency or project currency fields. This ensures that financial data aligns with the updated multicurrency model.
- Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Filter the Name field to locate and open **Update multi-currency fields to investment currency for existing demands and projects**.
3. Select **Active** and on the Scheduled Script Execution form, fill in the details.

   For a description of the field names, see Scheduled Script Execution form to generate labor costs for planning items.
4. Select **Update** to save your changes and execute the job as scheduled, or select **Execute Now** to run the scheduled job.

What to do next
When the job completes, review your project records to confirm that the investment currency fields are accurately populated.

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Configure portfolio financials in Strategic Planning

Configuration details for properties and scheduled jobs to view and manage portfolio financials in Strategic Planning

Before you begin

Role required: admin

Procedure

1. Enable integration for an internal planning item type.
   For more information, see Generate default mapping configurations.
2. Activate the investment entities for Demands, Projects, and Epics.
   For more information, see Activate investment entities for planning items.
3. Enable the roll up system property to true to view financials.
   For more information, see Activate rollup property for projects to view portfolio financials.
4. Activate the data generation scheduled job to view portfolio financials.
   For more information, see Activate a scheduled job to generate data to view portfolio financials.

Enable integration for internal planning item

Enable the integration for an internal planning item type to view portfolio financials.

Before you begin

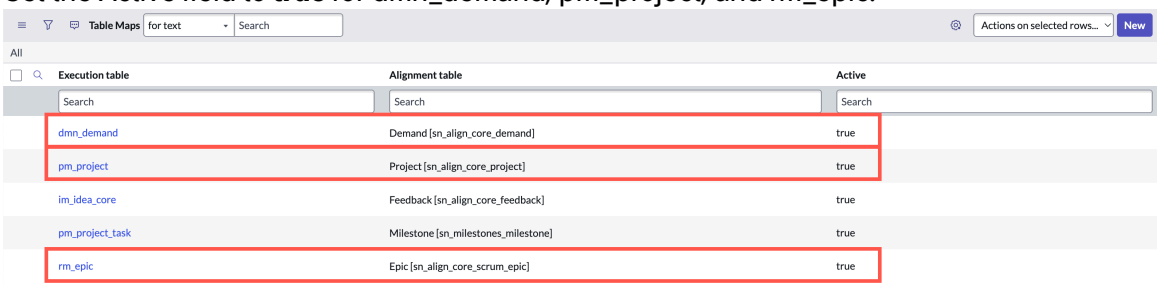
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Filter the name field to locate and open the **Table Map** [sn_align_cmn_int_table_map] table.
3. Select the **Show List** Related Link.

   If you are setting up your ServiceNow AI Platform for the first time, you need to create these mapping using the **New** button with the following mappings for Alignment table.

4. Set the Active field to **true** for dmn_demand, pm_project, and rm_epic.



Activate investment entities for planning items

Activate the investment entitied for Demands, Projects, and Epics to view portfolio financials.

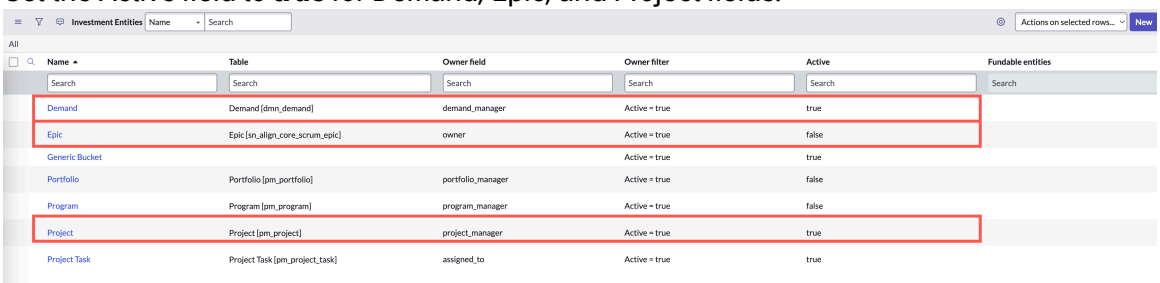
Before you begin

Role required: admin

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Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Filter the name field to locate and open the **Investment Entity** [sn_invst_pln_invst_funding_entity] table.
3. Select the **Show List** Related Link.
4. Set the Active field to **true** for Demand, Epic, and Project fields.



Activate rollup property for projects to view portfolio financials

Activate project cost rollup property to view the rolled up costs of top projects in portfolio financials.

About this task

Financial fields such as planned costs, forecasts, actual costs are rolled up from sub-projects to top projects upon setting this property to true.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Properties** > **All Properties**.
2. Filter the name field and select the **com.snc.project.rollup.cost** property.
3. Enter **true** in the Value field and select **Update**.

Activate a scheduled job to generate data to view portfolio financials

Activate and define **Data generation for financials in SPW/PPW** scheduled job to migrate budget from old data model to new data model and view portfolio financials.

About this task

It is a one-time activity to define and run this scheduled job to view portfolio financials.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Filter the name field to locate and open **Data generation for financials in SPW/PPW**.
3. Select Active option to activate and schedule the job.
4. Edit the fields on the Scheduled Script Execution form to customize the job and meet your requirements.

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For more information about the field description and scripts, see Automatically run a script of your choosing.

5. Select **Execute Now** to execute the scheduled job.

Result
All the required mappings to view the portfolio financials for Epics, Demands, and Projects are mapped.

To validate if the data generation job is successful, navigate to **All** > **System Definition** > **Tables** and check the mappings for **Investment** record in the **Project** [sn_align_core_project] table.

Customizing Lists in Strategic Planning

You can add custom tables to the Lists menu in Strategic Planning Workspace and manage access to the newly created categories and lists.

Perform the following tasks to customize Lists and manage access to the newly created categories and lists in the Lists page of Strategic Planning Workspace:

- Add the **New** button to the APW List Menu Configuration page. For more information, see Enable adding custom tables to the Lists menu.
- Add custom tables to the Lists menu. For more information, see Customize Lists in Strategic Planning Workspace.
- Manage who can view the newly created categories and lists in the Lists page. For more information, see Define audience for new lists in Strategic Planning.

Enable adding custom tables to the Lists menu

Add the **New** action button to the APW List Menu Configuration page, so that you can add custom tables to the Lists menu in Strategic Planning Workspace.

Before you begin
Role required: admin

Procedure

1. Navigate to **Workspace Experience** > **Actions & Components** > **List Actions**.
2. From the Action Assignments page, select **New** to create the action button.
3. On the form, fill in the fields.
   For a description of the field values, see Action Assignment form.
4. Select **Submit**.

Result
The **New** action button is added to the APW List Menu Configuration page.

What to do next
Customize Lists in Strategic Planning Workspace.

Customize Lists in Strategic Planning Workspace

Add custom tables to the Lists menu in Strategic Planning Workspace.

Before you begin

- Ensure that your application scope is set to **Portfolio Planning**.
- Enable adding custom tables to the Lists menu.

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Role required: admin

About this task

Lists menu in the Workspace homepage helps planning managers quickly find a record that they need. By default, this view shows the list of entities of all the planning items and lens available for this ServiceNow instance. If your planning managers need more categories or lists, you can add them.

For more information of configuring lists in a workspace, see Lists.

Procedure

1. Navigate to **sys_ux_list_menu_config.list**.
2. From the UX List Menu Configurations list, select **APW List Menu Configuration**.
3. Select a new category or a new list.

   Tip:
   Create a category first and then create a list.

4. On the form, fill in the fields.
   - UX List Category form.
   - UX List form.
5. Select **Submit**.
   Repeat this procedure until you've created all the custom categories and lists.

What to do next

Define audience for new lists in Strategic Planning.

Define audience for new lists in Strategic Planning

Manage who can view the newly created categories and lists in the Lists page of Strategic Planning Workspace.

Before you begin

Customize Lists in Strategic Planning Workspace.

Role required: admin

Procedure

1. Navigate to **sys_ux_applicability_m2m_list.list**.
2. Select **New**.
3. On the form, fill in the fields.
   For field information, see List Applicability form.
4. Select **Submit**.

Strategic Planning diagnostics

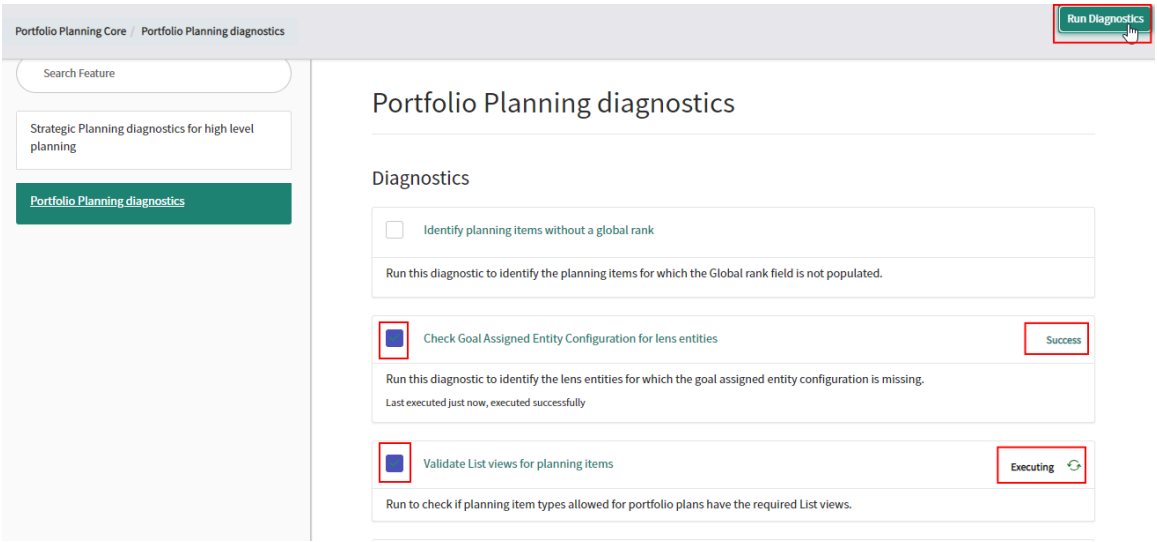
Run diagnostic scans to identify and fix errors in the configuration and other common settings for Strategic Planning before your planning managers prioritize and roadmap work for their portfolio plans.

Strategic Planning diagnostic scans help you find discrepancies by validating the configuration for the following:

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- Lens and lens structure
- Form views, list views, related list views, and workspace view rules for planning items
- Global ranking for planning items
- Portfolio plans
- Goals data
- high-level planning entities

The following are the default diagnostic scans available for Strategic Planning.



Strategic Planning diagnostics for high-level planning

Field	Description
Validate Rank configuration for the high-level planning entities	Verifies that entities enabled for high-level planning have a Rank configuration. If this test fails, see Create rank configuration for high-level planning to fix failure.
Validate Form section views for high-level planning entities	Verifies that all the lens entities that are enabled for high-level planning have the required Form section views. If this scan fails, the result displays the Form section views that are missing for certain entities that are enabled for high-level planning. To learn how to fix these, see Create form views for new planning item tables in Strategic Planning.

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Field	Description
Validate Related list views for high-level planning entities	Verifies that all the lens entities that are enabled for high-level planning have the required Related list views. If this scan fails, the result displays the Related List views that are missing for certain entities that are enabled for high-level planning. To learn how to fix these, see Create related list views for new planning item types in Strategic Planning.
Validate List views for high-level planning entities	Verifies that all the lens entities that are enabled for high-level planning have the required List views. If this scan fails, the result displays the List views that are missing for certain planning item tables. To learn how to fix these, see Create list views for new planning item tables in Strategic Planning.
Identify high-level planning entities enabled for planning, without a global rank	Identifies the number of high-level planning entities that do not have a global rank. If this scan fails, the result shows the planning items that do not have a global rank. Click **Run Fix Script** to populate a global rank to items for which this field is empty.

Portfolio Planning diagnostics

The following are the diagnostic scans available to validate common configuration errors for planning items, goals, and portfolio plans:

Name of the scan	Description
Identify planning items without a global rank	Identifies the number of planning items on the Prioritization List page, for which the global rank is not populated. If this scan fails, the result shows the planning items that do not have a global rank. Click **Run Fix Script** to populate a global rank to items for which this field is empty.
Check Goal Assigned Entity Configuration for lens entities	Identifies the lens entities for which the goal assigned entity configuration is missing.

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Name of the scan	Description
	If this scan fails, the result shows the lens entities that don't have Assigned Entity Configuration.
Validate List views for planning items	Verifies that all the planning items that can be added to portfolio plans have the APW Prioritization and APW Default List views. If this scan fails, the result displays the List views that are missing for certain planning item tables. To learn how to fix these, see Create list views for new planning item tables in Strategic Planning.
Validate Form section views for planning items	Verifies that all the planning items that can be added to portfolio plans have the APW Prioritization, APW Default, and APW New form views. If this scan fails, the result displays the Form section views that are missing for certain planning item tables. To learn how to fix these, see Create form views for new planning item tables in Strategic Planning.
Validate Related list views for planning items	Verifies that all the planning items that are allowed on portfolio plans have the APW Default Related list view. If this scan fails, the result displays the Related list views that are missing for certain planning item tables. To learn how to fix these, see Create related list views for new planning item types in Strategic Planning.
Validate Workspace view rule for Default view of planning items	Verifies that all the planning items that are allowed on portfolio plans have the Default view's workspace view rule. If this scan fails, the result displays the Default view rule is missing for certain planning item tables. To learn how to fix these, see Create workspace view rules for new planning item forms in Strategic Planning.

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Name of the scan	Description
Validate the goal relationships for assigned entities	Identifies if there are any m2m goal relationships defined for assigned entities. If this scan fails, the result displays the goals that do have m2m goal relationships any assigned entity table. You can run the *`Migrate goal relationships for assigned entities`* scheduled job to migrate the existing goal relationship data from the Goal Relationship [sn_gf_goal_m2m_relationship] table to the Goals table. For more information, see Migrate goal relationships for assigned entities.
Validate Workspace view rule for APW Default view of planning items	Verifies that all the planning items that are allowed on portfolio plans have the APW Default view's workspace view rule. If this scan fails, the result displays the APW Default view rule is missing for certain planning item tables. To learn how to fix these, see Create workspace view rules for new planning item forms in Strategic Planning.
Validate invalid fields in the Portfolio Plan configuration	Finds any invalid fields in the portfolio plan configuration records for all existing portfolio plans. If this scan fails, click **Run Fix Script** to remove the identified invalid fields.
Validate Portfolio Plan Configuration for all the portfolio plans	Verifies if each existing portfolio plan created in your instance has a valid portfolio plan configuration.

Configuring Strategic Planning with PPM, Agile 2.0, and SAFe

Understand the process required to set up Strategic Planning to work with Agile Development 2.0, Scaled Agile Framework, and Project Portfolio Management.

Configuration workflow

Use the following steps as guidelines for your Strategic Planning with PPM, Agile 2.0, and SAFe setup process. Some of these steps require the admin role (sn_align_core.apw_admin) and some require the user role (sn_align_core.apw_user).

1. Create an alignment integration
2. Generate default mapping configurations
3. Create custom mapping configurations (Optional)

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Guided Setup

After installing Strategic Planning, you can use the guided setup to help you with the required configuration. To open the guided setup, navigate to **Strategic Planning** > **Guided Setup**.

Create an alignment integration

Once you have Strategic Planning installed, the **ServiceNow Internal** Alignment integration is created by default. In case the alignment integration is not available, you can create your alignment integration type.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Strategic Planning** > **Integrations**.
2. Verify if the **Servicenow Internal** alignment integration exists.
3. If not, click **New** to create an alignment integration.
4. In the **Name** field, enter the name of the alignment integration.
   Alternatively, you can also click **Create ServiceNow Internal Integration** from the related links to create an internal alignment integration.
5. Click **Submit**.

Generate default mapping configurations

Generate default mapping configurations to create table maps for the available applications.

Before you begin

Role required: sn_align_core_apw.admin

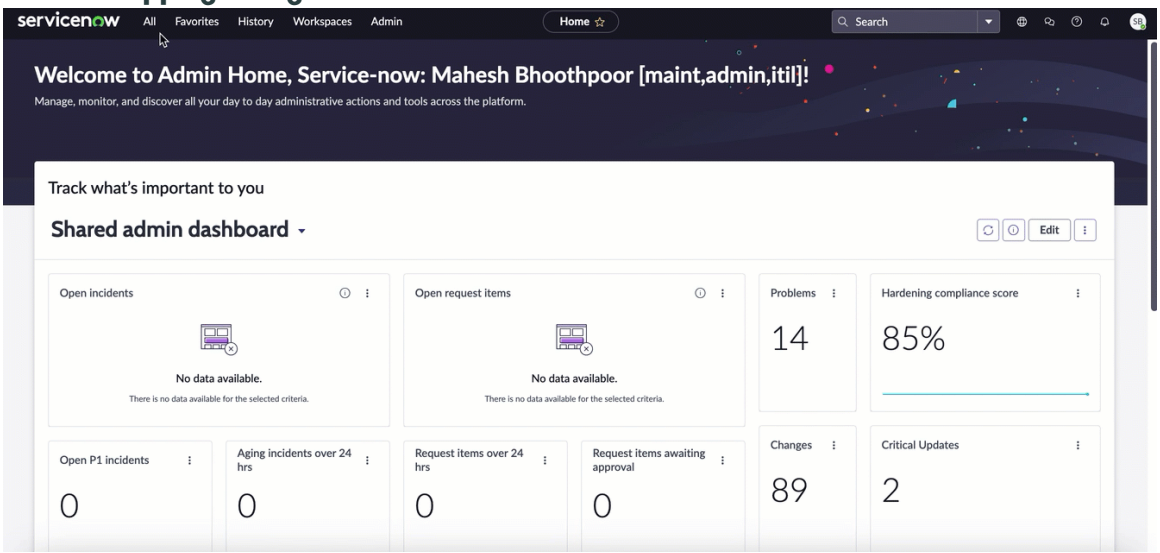
Procedure

1. Navigate to **All** > **Strategic Planning** > **Integrations**.
2. Click **ServiceNow Internal** to view the alignment integrations for the internal applications.
3. Click **Generate Default Mapping Configurations** to create the table maps for the available applications.
   For details on the list of table maps that are created for the respective applications, see the following table:

Application installed	Table maps created
Project Portfolio Management	Projects, project tasks (for milestones), demands, and idea
Agile Development 2.0	Epics
SAFe	SAFe epic

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Default mapping configurations



Note:
Mapping configurations consist of table, field, and choice maps for each record.

Create custom mapping configurations

Create mapping configurations for planning items that are not created by default such as features, stories, etc.

As an admin, you can choose to create table maps, field maps, and choice maps for the planning items that are not created by default. For more information, see:

1. Create a table map
2. Create a field map
3. Create a choice map

Create a table map

Create a table map to define the mapping between tables in Strategic Planning with the tables in Agile Development 2.0, SAFe, and PPM.

Before you begin

Role required: sn_align_core.apw_admin

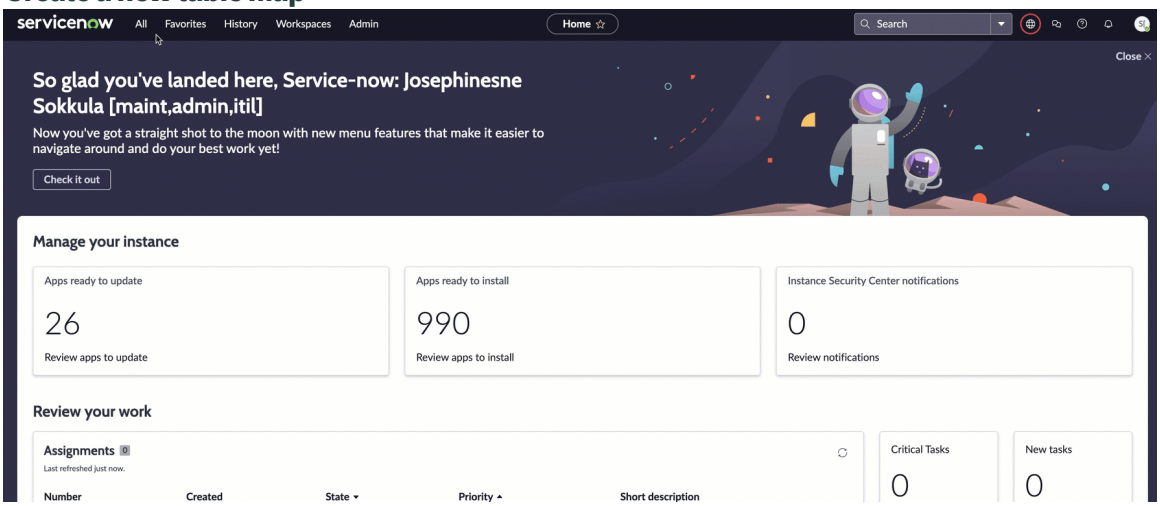
Procedure

1. Navigate to **All** > **Strategic Planning** > **Integrations**.
2. Select **ServiceNow Internal**.
3. Create a new table map by selecting **New** in the **Table maps** tab.
4. In the Table map form, fill in the fields.

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5. Select **Submit**.

Create a new table map



Result

A new table map is created with your alignment and execution table configurations.

Note:
To create or update a table map for a planning item type other than demand or project, the SPM Pro license is required. Contact your administrator for more details.

What to do next

Create a business rule to support export of this new table map configuration to Agile Development 2.0, SAFe, or PPM. For more information, see Create a business rule to apply a custom table map configuration.

Create a business rule to apply a custom table map configuration

Create a business rule to enable import for your new custom table map configuration from Agile Development 2.0, SAFe, and PPM applications.

Before you begin

Role required: sn_align_core_apw.admin

About this task

After you create a custom table map in Strategic Planning integrations, create a business rule similar to 'Sync Data from Execution to Alignment' business rule in the rm_epic or dmn_demand tables.

Note:
Ensure that the business rule is created in the execution application, such as Agile Development 2.0, SAFe, or PPM.

Procedure

1. Navigate to **All** > **System Definition** > **Business Rules**.
2. From the list of available business rules, locate and open the Sync Data from Execution to Alignment rule.
3. From the context menu (☰), perform an Insert and Stay operation on this business rule. If you have not enabled the **Insert and Stay** action in your ServiceNow instance, see Allow insert options on records.
4. On the business rule form, edit the following fields.

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Business rule form

Field	Description
Name	Unique name for the business rule. For example, if your new table map is to map demands, name this rule as Sync Demands with Strategic Planning.
Table	Select the table for which you've created the custom map. For example, Feature [sn_safe_feature].

5. Click **Update**.

Create a field map

Map the fields for each table map from Strategic Planning to Agile Development 2.0, SAFe, Project Portfolio Management and vice-versa.

Before you begin

Ensure that you have created a table map for an alignment integration record. For more information, see Create a table map.

> **Note:**
> If the execution field type is 'Reference' and the alignment field type is 'String', then the sync will not work.

Role required: sn_align_core.apw_admin

Procedure

1. Navigate to **All** > **Strategic Planning** > **Integrations**.
2. Select **ServiceNow Internal.**
3. In the **Table Maps** related list, select the table map for which you want to create a field map.
4. Create a new field map by selecting **New** in the Field Maps tab.
5. In the Field map form, fill in the fields.
6. Click **Submit**.

Create a choice map

Map the choice list for each field map for fields with a list of values from Strategic Planning to Agile Development 2.0, SAFe, Project Portfolio Management and vice-versa.

Before you begin

Ensure that you have created a field map and it contains choice fields with a list of values. For more information, see Create a field map.

Role required: sn_align_core.apw_admin

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Procedure

1. Navigate to **All** > **Strategic Planning** > **Integrations**.
2. Select **ServiceNow Internal**.
3. In the **Table Maps** related list, select the table map which has the fields for which you want to create a choice map.
4. In the **Field Maps** related list, select a relevant field map for which you want to create a choice map.
5. Create a new choice map by selecting **New** in the Choice Maps tab.
6. In the Choice map form, fill in the fields.
7. Click **Submit**.

Configure bulk import

This system property enables you to update the bulk import functionality in Strategic Planning with PPM, Agile 2.0, and SAFe.

Before you begin

Role required: sn_align_core.apw_admin

Procedure

1. Enter `sys_properties.list` in the navigation filter.
2. Search for *`com.sn_align_cmn_int.bulk_import`*.
3. Set the property value to either of the following options.
   When the records are imported from PPM, Agile Development 2.0, or SAFe to Strategic Planning , only the last comment will be imported.

Working with Teamspaces

Strategic Planning can be integrated with Project Portfolio Management's Teamspaces to access and manage relevant projects and demands with the corresponding planning item records.

You must activate a teamspace plugin to use the teamspace feature. The following teamspace plugins are available:

- Project Management TeamSpace 1 (com.snc.ppm_teamspace_1)
- Project Management TeamSpace 2 (com.snc.ppm_teamspace_2)
- Project Management TeamSpace 3 (com.snc.ppm_teamspace_3)
- Project Management TeamSpace 4 (com.snc.ppm_teamspace_4)
- Project Management TeamSpace 5 (com.snc.ppm_teamspace_5)

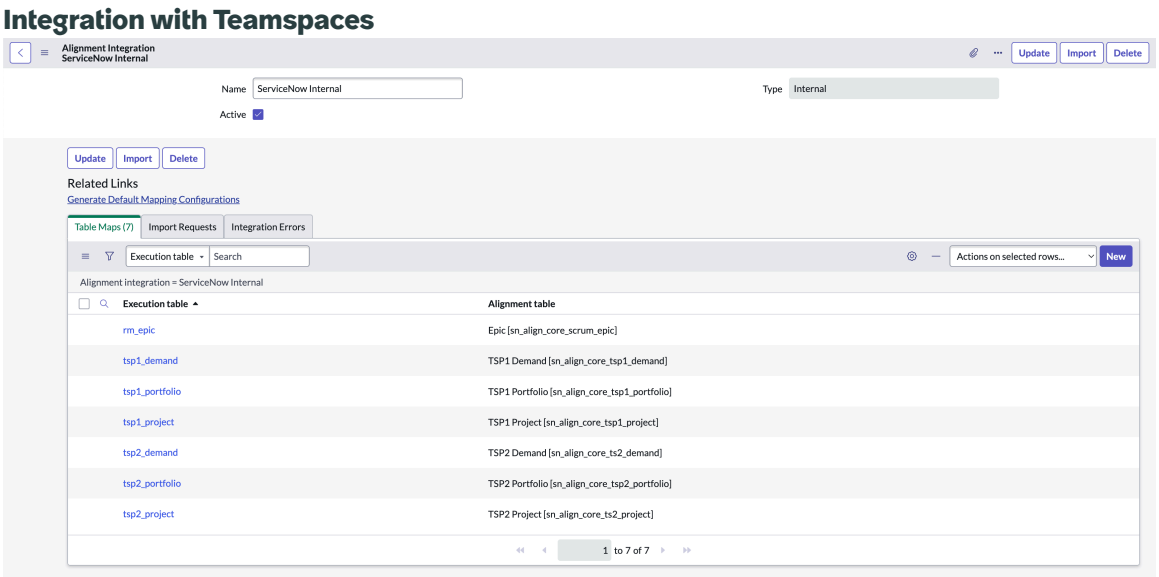
The teamspaces installed with these plugins contain the same components, but the components have different prefixes. For example, teamspace 1 includes a project table named **Teamspace_1 Project [tsp1_project]** and teamspace 5 includes a project table named **Teamspace_5 Project [tsp5_project]**.

Also, the corresponding teamspace role must be added to the Strategic Planning admin (sn_align_core.apw_admin) role. For example, tsp1_portfolio_manager for teamspace1, tsp2_portfolio_manager for teamspace2 and so on.

To integrate teamspaces with Strategic Planning records:

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1. Create one alignment integration for all the teamspaces. On the alignment side, create extended tables to store individual teamspace table data (like TSP1 Portfolio [sn_align_core_tsp1_portfolio], TSP1 Demand [sn_align_core_tsp1_demand], TSP2 Project [sn_align_core_tsp2_project], and so on).
2. In the alignment integration, map the extended tables you have created in Step 1, to the respective teamspace tables (like tsp1_portfolio, tsp1_demand, tsp2_project, and so on).



Related topics

Create a table map

Managing portfolio plans in Strategic Planning Workspace

Create personalized portfolio plans in Strategic Planning Workspace and enable focused planning of work in the desired perspective (lens) to drive alignment.

The following sections guide you on creating, updating, sharing, and collaborating with portfolio plans in Strategic Planning Workspace.

Create a high-level portfolio plan

Build a portfolio plan for high-level strategic items in the Strategic Planning Workspace so that you can prioritize, roadmap, and manage work aligned to these strategic items.

Before you begin

Role required: sn_align_core.apw_user or business_stakeholder

About this task

By default, you can select the Strategic Investments lens and use Initiatives or Strategic Programs, or select the Project Program lens and use Programs as your high-level planning items. You can also select the Digital Product lens and use the Product Enhancement entity for high-level planning. If you want to plan using a different item, work with your admin to enable those items in your ServiceNow instance. For more information on the configuration, see High-level planning configuration in Strategic Planning.

In this task, select a lens, add conditions to filter the planning item data that you need, and enter additional details to build a portfolio plan.

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Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the Portfolio Plans page, select **New**.
   If there are no existing portfolio plans, select **Create your first portfolio plan**.
3. Select a lens for your high-level planning.

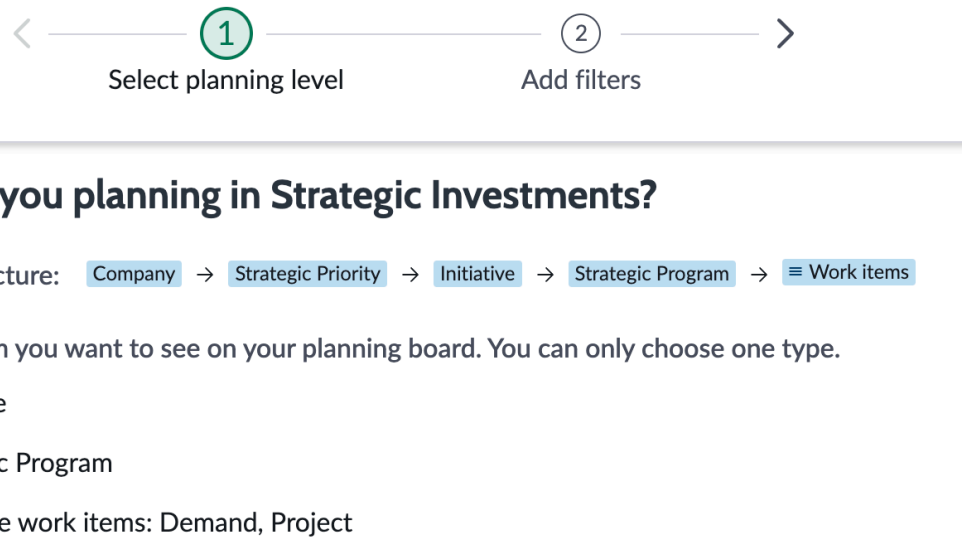
   By default, the Strategic Investments and Project Program lenses are enabled for high-level planning.

   Note:
   Don’t select Goals lens because the Goal [sn_gf_goal] table doesn't support high-level planning.

   The Create portfolio plan wizard is shown.
4. Make your selections by using the Create portfolio plan wizard.

   a. For the selected lens, choose the type of work that you want to plan.

   For example, you want to manage work for initiatives in your company. Select Initiatives as your high-level planning item. This enables you to plan for initiatives and review the work aligned to these initiatives.



   b. Add conditions to further filter the data of your planning items.

   For example, you’re responsible for the initiatives of the Customer Support department. You can set a condition to filter initiatives of only the Customer Support department from the Initiative table.

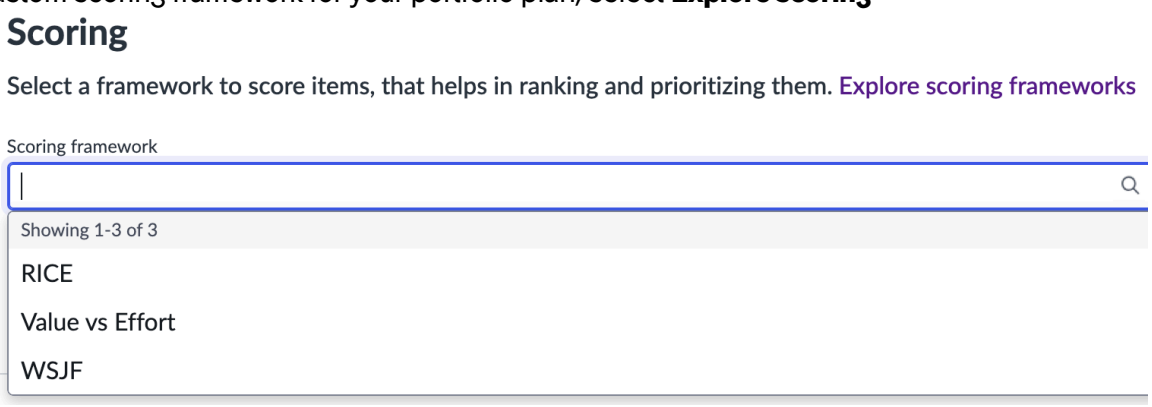
   You can also add multiple conditions to help you set a complex filter and add the right information to your portfolio plan.

   c. Fill in the details of the portfolio plan.

   Provide the information of the portfolio plan's name, owner, start and end dates, and description.

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d. Select a scoring framework using the drop-down values or from the Scoring framework window.
To create a custom scoring framework for your portfolio plan, select **Explore scoring frameworks**.



Use the **Previous** and **Next** buttons to navigate between the steps.

5. Select **Create**.

Result
The portfolio plan is created and the page is refreshed to show the Goals, Scoring, and Planning pages. You can view the list of all portfolio plans that you own or shared with you from the Home page.

What to do next
- Define goals for your portfolio plan and align work to them. See Managing goals in Strategic Planning Workspace.
- Analyze the backlog and prioritize work for your portfolio plan. See Prioritizing portfolio plan work in Strategic Planning Workspace.
- Show or hide features for your portfolio plan according to your requirement while sharing a portfolio plan with your stakeholders. See, Show or hide the features for a portfolio plan.

Create a portfolio plan in Strategic Planning

Use lens and build a personalized portfolio plan in Strategic Planning Workspace so that you can start to prioritize and align work.

Before you begin
Role required: sn_align_core.apw_user or business_stakeholder

About this task
Use a four-step wizard to select a lens, add conditions to filter the planning items that you need, and enter additional details to create a portfolio plan.

(For Enterprise Architecture Workspace users only) You must install Enterprise Architecture Workspace to create a portfolio plan using the Business Capability lens. You must have the sn_apm.apm_user role to create a portfolio plan using the Business Capability lens.

This task guides you on creating a regular work item-level portfolio plan. To create high-level portfolio plans, see Create a high-level portfolio plan.

Procedure
1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the Portfolio Plans page, select **New**.

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If there are no existing plans, select **Create your first portfolio plan**.

3. Make your selections by using the Create Portfolio plan wizard.

   a. Select a lens.

   b. For the selected lens, choose an entity type and the desired entities of that type.

   The entity type represents the level that you plan your work in.

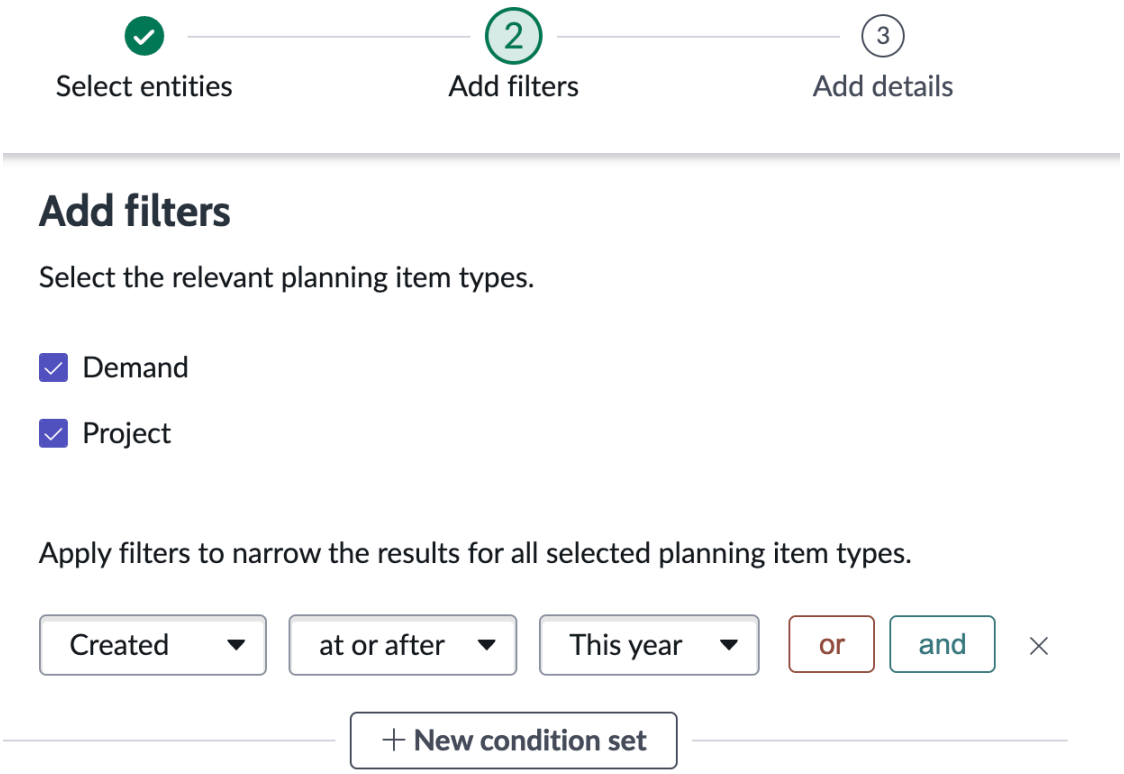
   For example, to plan work for the HR department, select the **Organization** as lens, **Department** as your entity type, and **HR** from the list of departments. This selection ensures that only the work associated with the HR department is added to your portfolio plan.

   c. Select the type of planning items that you want to include in your portfolio plan.

   You can further filter the planning item data with additional conditions.

   For example, to plan and track progress for all HR projects created this year, select **Project** as your planning item and add a condition to filter all the HR projects created this year.

   You can also add multiple conditions to set a complex filter and add the right planning items to your portfolio plan.



   d. Fill in the details of the portfolio plan.

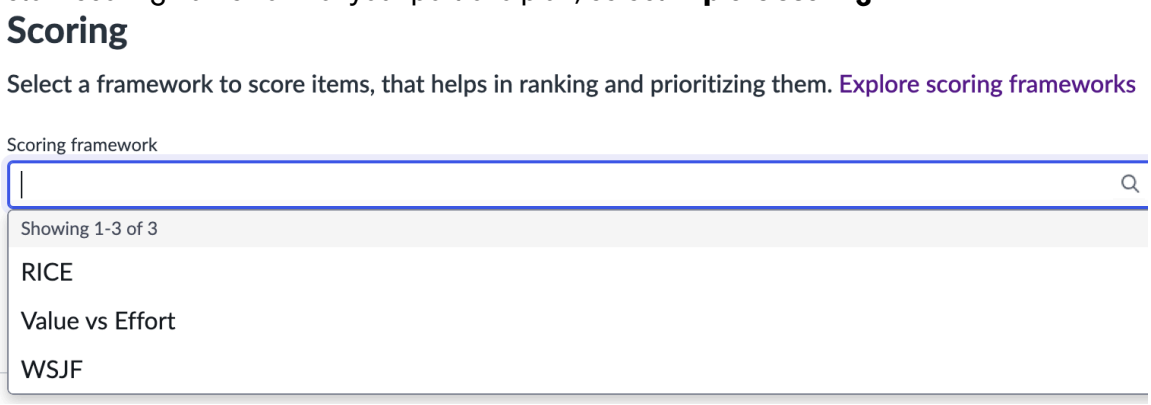
   Provide the portfolio plan's name, owner, start and end dates, and description.

> **Important:**
> The start and end dates for your portfolio plan act as a date range filter for all the planning items that get added to the plan.

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For example, if your portfolio plan spans from March 1, 2023, to July 6, 2024, then the projects approved with start and end dates in Feb 2023 won't appear in the plan, despite meeting the "created in 2023" criteria.

e. Select a scoring framework using the drop-down values or from the Scoring framework window.
To create a custom scoring framework for your portfolio plan, select **Explore scoring frameworks**.



You can use **Previous** and **Next** to navigate between the steps.

4. Select **Create**.

Result

The portfolio plan is created and the page is refreshed to show the Goals, Scoring, and Planning pages for this new portfolio plan. You can view the list of all portfolio plans that you own or are shared with you from the Home page.

Planning items that meet the following criteria appear in the portfolio plan:

- Planning items that belong to one of the entity types selected in Step 3(b)
- Planning items that match the planning item types selected in Step 3(c)
- Planning items with an approved start date or an end date that falls within the portfolio plan timeline
- Planning items that don't have both Approved start and Approved end dates

Note:
If any demands were converted into projects in Project Portfolio Management, only the resulting project planning items (converted from demands) appear in the portfolio plan.

What to do next

- Define goals for your portfolio plan and align your work to them. See Managing goals in Strategic Planning Workspace.
- Analyze the backlog and prioritize work for your portfolio plan. See Prioritizing portfolio plan work in Strategic Planning Workspace.
- Show or hide features for your portfolio plan according to your requirement while sharing a portfolio plan with your stakeholders. See, Show or hide the features for a portfolio plan.

Create a copy of an existing portfolio plan in Strategic Planning

Create a portfolio plan with the data of an existing portfolio plan. If the portfolio plan you want to create is similar to an existing portfolio plan, copying the existing portfolio plan saves your time. You can also copy portfolio plans that were shared with you either with view or edit access.

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Before you begin
Role required: sn_align_core.apw_user or business_stakeholder

About this task
The **Duplicate portfolio plan** option copies the selected portfolio plan with its all data (Goals, Prioritization, and Roadmap) into the portfolio plan. It also preserves all dependencies and relationships among the copied items and their child items.

Procedure
1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one.
3. From the portfolio plan header, select the More actions icon (⋮) and then select **Duplicate portfolio plan**.
4. On the Duplicate portfolio plan window, fill the details.
   a. Enter a name for the portfolio plan in the **Portfolio plan name** field.
   By default, the name is *ABC (Copy)* where ABC is the name of the portfolio plan you copied from.
   b. **Optional:** Select **Share with same users and groups** option to grant access to the users of the portfolio plan you copied from.
   The action grants the same read and edit access as is the users had for the portfolio plan you copied from.
   c. Select **Confirm**.

Result
The new portfolio plan is created and a link is generated on the screen to access the new portfolio plan.

What to do next
- View or update the goals for your portfolio plan according to the new portfolio plan. See Managing goals in Strategic Planning Workspace.
- Analyze the backlog and prioritize work for your portfolio plan. See Prioritizing portfolio plan work in Strategic Planning Workspace.
- Show or hide features for your portfolio plan according to your requirement while sharing a portfolio plan with your stakeholders. See, Show or hide the features for a portfolio plan.

Modify a portfolio plan in Strategic Planning

Update the details of a portfolio plan in Strategic Planning Workspace or delete it, to reflect the changes in your planning priorities.

Before you begin
Create a portfolio plan in Strategic Planning.

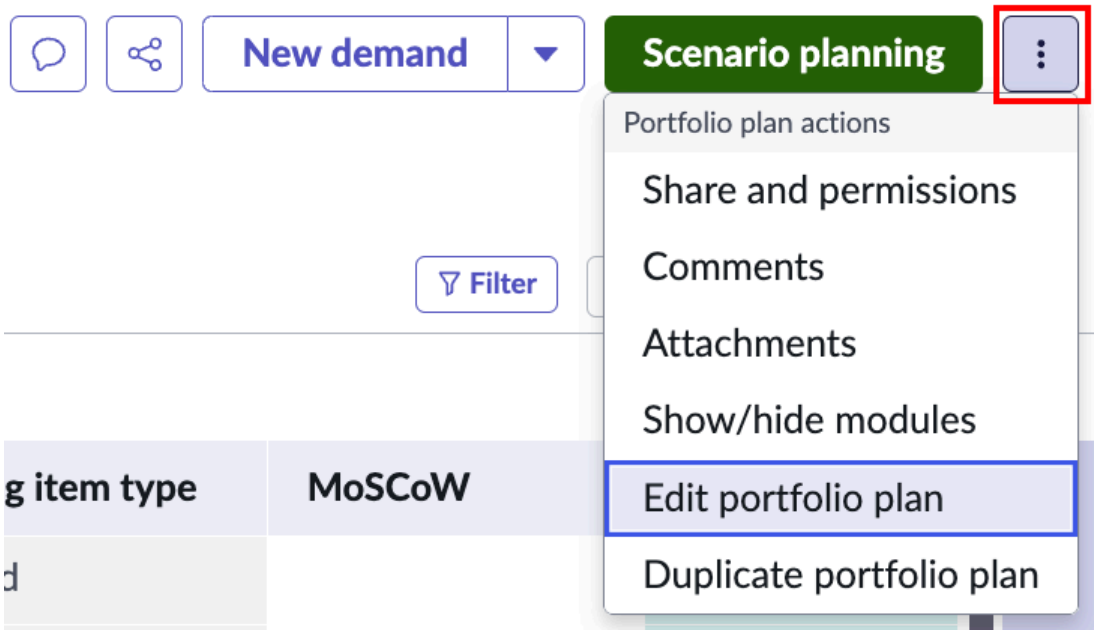
Role required: sn_align_core.apw_user or business_stakeholder

About this task
Note:
Only the owner or editors of a portfolio plan can modify it.

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Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one.
3. From the portfolio plan header, select the More actions icon ( ).



4. Update the details of the portfolio plan or delete it.

Related topics

- Share a portfolio plan in Strategic Planning
- Collaborate on a portfolio plan in Strategic Planning
- Show or hide the features for a portfolio plan

Show or hide the features for a portfolio plan

As a portfolio manager, show or hide the features (for example, Goals, Scoring, Prioritization, Roadmap, and so on) for your portfolio plan as needed so that you can share only the required data with your stakeholders.

About this task

Hiding features for your portfolio plan helps you share only the data that matters to your stakeholders and restrict access to the other data in your portfolio plan.

Note:
When you share a portfolio plan with your stake holder providing view access and hiding a feature (for example, Scoring), the viewer can only view the enabled features and can't see the hidden feature (Scoring) in the shared portfolio plan. However, when you share a portfolio plan providing edit access, the editor can enable or hide the features as required and can view and edit any data in the shared portfolio plan.

Before you begin

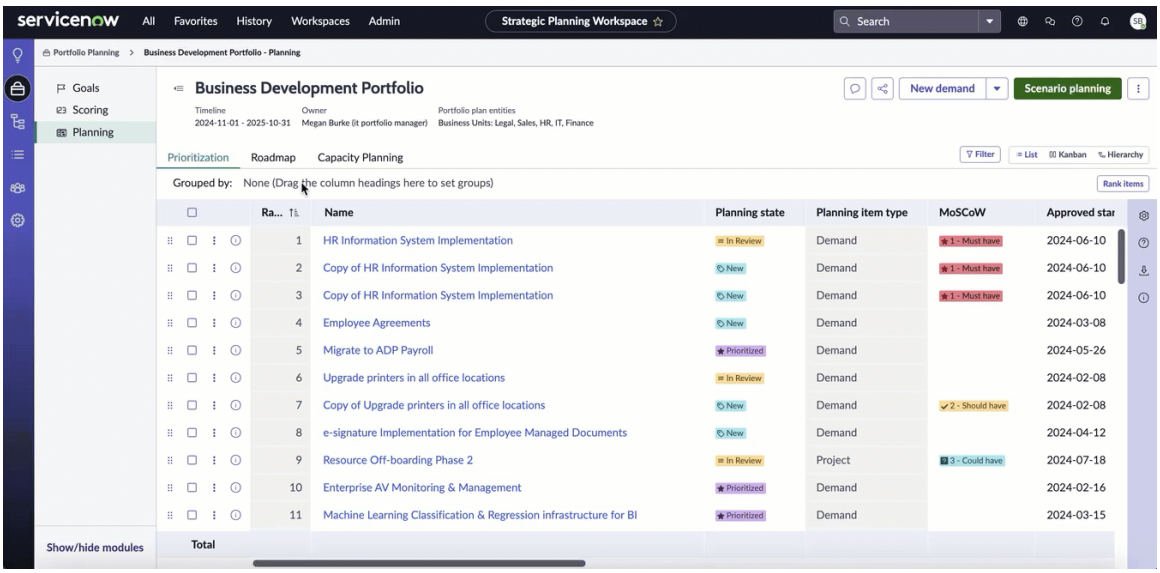
Create a portfolio plan in Strategic Planning.

Role required: sn_align_core.apw_user or business_stakeholder

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Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select the portfolio plan for which you want to show or hide the features.
3. From the left pane of the portfolio plan, select **Show/hide modules**.
4. On the Show/hide modules window, select the modules and features that you want to show and deselect the modules and features that you want to hide.



5. Select **Apply changes**.

Related topics

Share a portfolio plan in Strategic Planning

Share a portfolio plan in Strategic Planning

Share your portfolio plan with stakeholders and other planning managers so that they have visibility into the plan's progress and start collaborating.

Before you begin

- Create a portfolio plan in Strategic Planning.
- Users or groups that you want to share the portfolio plan with must have the sn_align_core.ap_read_only or sn_align_core.apw_user role to get the read or edit access to the portfolio plan respectively.

Role required: sn_align_core.apw_user or business_stakeholder

About this task

Select individual users or groups to share the portfolio with.

When you share a portfolio plan with an individual user or a group, they can access the following data of the portfolio plan:

- Planning page (Prioritization and Roadmap tabs) by default
- Capacity tab in the Planning page if the user has the sn_align_ws.spw_capacity_user or sn_align_ws.spw_capacity_read role
- Goals page if the user has the sn_apw_advanced.spw_goal_user role.

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Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one.
3. From the portfolio plan header in the Planning page, select the **Share portfolio plan** icon ( ).
4. On the Share portfolio plan form, select users to share the portfolio plan with and set their access appropriately.
   a. In the **Members or Groups** field, enter the names of individual users or groups.
   b. From the **Access** field, select the access level as **Viewer** or **Editor** for the selected names.
      - An editor can view and change the portfolio plan's settings and data.
      - A viewer can only comment or add attachments. They can't change any settings or data.

      Note:
      Even if a user is granted view-only access to a portfolio plan, they can still edit planning item tables or any associated tables used in the portfolio plan if they have the sn_align_core.apw_user role assigned.
5. Select **Send invite**.

Result
The selected individual and group users are notified of the portfolio plan sharing through an email.

What to do next
Collaborate on a portfolio plan in Strategic Planning.

Change the access level or remove access for a user or a group.

1. On the Share portfolio plan form, select **Manage access**.
2. From the user or group card, select the Action Menu icon ( ).
3. Select the right access level or select **Remove**.

Related topics
- Modify a portfolio plan in Strategic Planning
- Show or hide the features for a portfolio plan

Collaborate on a portfolio plan in Strategic Planning

Add comments and attachments to your portfolio plan so that users can review and share their feedback. Collaborate with stakeholders and drive shared outcomes.

Before you begin
Create a portfolio plan in Strategic Planning.

Role required: sn_align_core.apw_user or business_stakeholder

About this task
Comment on plans and data points, share attachments, and provide feedback from a single place in the workspace to ensure all the stakeholders are in alignment with the business priorities.

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The attachments and comments that you add from the portfolio plan's header, they apply to the entire portfolio plan (Goals, Prioritization, and Roadmap).

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one.
3. From the portfolio plan header in the Planning page, select the **Comments** icon ( ).
4. Add comments or attachments to the portfolio plan.

Related topics

- Modify a portfolio plan in Strategic Planning
- Share a portfolio plan in Strategic Planning
- Show or hide the features for a portfolio plan

Scoring planning items in Strategic Planning Workspace

Evaluate the work in your portfolio plans using scoring frameworks in Strategic Planning Workspace. Determine the priority and feasibility of planning items using the scores assigned to them so that you can make informed decisions about resource and finance allocations.

The following sections guide you on scoring and ranking the items in your portfolio plan in Strategic Planning Workspace.

Score items in a portfolio plan

Score your items using the Scoring framework attributes that generate a score, that helps in prioritizing and ranking the items in your portfolio plan.

Before you begin

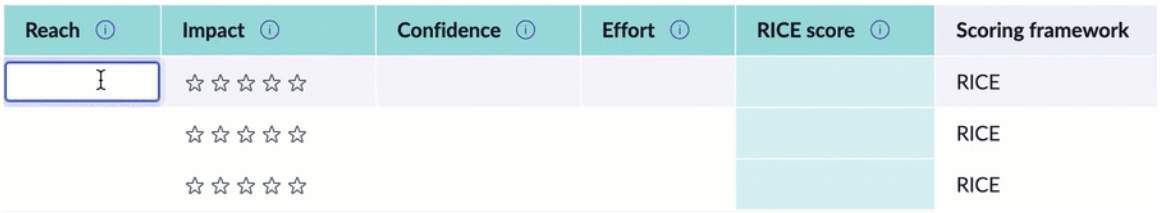
Role required: sn_align_core.apw_user

Procedure

1. Navigate to **All** > **Strategic Planning** > **Strategic Planning Workspace**.
2. Select to open the portfolio plan for which you want to start scoring.
   If you don't have a scoring framework assigned to your portfolio plan:
   a. Select the more actions icon ( ).
   b. Select **Edit portfolio plan**.
   c. Navigate to the **Add Details** step.
   d. Select a framework for your portfolio plan.

   Note:
   The scoring framework selection is available only for planning items.
3. Select **Scoring**.
4. Enter values for each of the scoring framework attributes.

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To learn about the scoring framework attributes and the scoring formula, select the information icon (ⓘ) for each of the fields.

Result
The score for each item is populated based on the scoring attribute values and calculation formula.

Note:
To generate a final score for a pre-defined scoring framework, all the attributes of a scoring framework need to have values.

Related topics

Scoring in Strategic Planning

Custom scoring frameworks in Strategic Planning

Rank items in a portfolio plan

Assign ranks to the items based on the planning item attributes and scoring framework attributes such as Planned Cost, Moscow, Priority, Score, and so on.

Before you begin
Role required: sn_align_core.apw_user

Procedure

1. Navigate to **All** > **Strategic Planning** > **Strategic Planning Workspace**.
2. Select to open the portfolio plan for which you want to start ranking of items.
3. Select **Planning**.
4. Select **Rank items** in the Prioritization view.
5. Select an attribute using the drop-down list.
   For example, if you want to rank your items based on confidence, select **Confidence** as an attribute. You can rank on choice and number type attributes of a planning item.
6. Choose the order in which you want the items to be ranked.
7. Select **Apply**.

Result
The items in your portfolio plan are ranked based on your ranked attribute.

Export planning items data from Scoring to Excel or CSV

Export the data of portfolio plan items from your portfolio plan into a Microsoft Excel or CSV file. You can share this data and collaborate with your business stakeholders.

Before you begin
Role required: sn_align_core.apw_user

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Procedure

1. Navigate to **All** > **Strategic Planning** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Scoring**.
3. Verify that the columns you want to export are personalized.

   Note:
   If the filters are applied on the view, the filtered data is exported.

4. Use the personalized side panel to export the data of your portfolio plan items.

   a. Select Export icon ( ).

   b. From the **File type** drop-down on the Export window, select **Excel** or **CSV** to export the data to a Microsoft Excel or CSV file respectively.
   A file with the selected format is exported. By default, the name of the file is *ABC_Scoring_List* where ABC is the name of the portfolio plan you exported the data from.

Managing goals in Strategic Planning Workspace

Create goals for your portfolio plans, set targets for them, and evaluate the progress of the goals and targets in Strategic Planning Workspace to accomplish your organizational plans and drive business outcomes.

https://player.vimeo.com/video/1089949088?h=313cb311d3&badge=0&autopause=0&player_id=0&app_id=58479

The Goals view in the Strategic Planning Workspace gives you an overview of your goals and their targets with the Dashboard, List, and Hierarchy tabs. The Dashboard tab (formerly known as the Overview tab) provides a summary of all your goals in a particular portfolio plan. The List tab helps you view, create, and manage your goals and targets of the particular portfolio level. The Hierarchy tab helps you view the goals and targets of the portfolio plan entities in a hierarchical manner. This tab also helps you view the goals of the parent entities (of the portfolio plan entities) along with the goals and targets of the current portfolio plan.

Roles required for managing goals

Access level	Required roles
Read access to Goals	• sn_align_core.apw_user • sn_apw_advanced.spw_goal_user_read
Edit access to Goals	• sn_align_core.apw_user • sn_apw_advanced.spw_goal_user

Portfolio plan details section in the Goals view

The portfolio plan details section in the Goals view provides the portfolio plan details along with options to manage the portfolio plan and create goals. The header section is the same for all tabs in the Goals view.

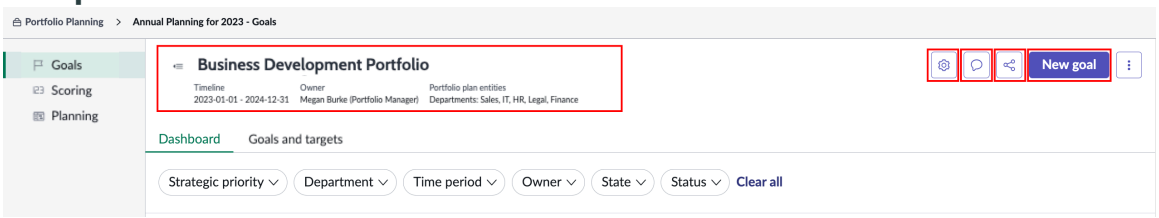
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From the Portfolio plan details section, you can:

- Create goals for your portfolio plan.
- Share your portfolio plan with stakeholders and other planning managers so that they have visibility into the progress of the plan and can start collaborating.
- Collaborate with stakeholders and drive shared outcomes by adding comments and attachments to your portfolio plan so that users can review and share their feedback.
- Customize the widgets and cards that you want to view on the Dashboard tab using the Settings icon ( ). This setting is available only when the Dashboard tab is selected.

Note:
Only users with access to edit the portfolio plan can customize the widgets and cards.

Example Header section in the Goals view



Dashboard tab in the Goals view

The Dashboard tab has multiple widgets that help you drill down in the goals and targets, see their details, and manage them. The following figure shows a sample goals list and indicates the different features for goals in Strategic Planning Workspace on the Dashboard tab.

- Goals: A section with multiple widgets that help you view and manage your goals and targets defined for the portfolio plan.
  - Total progress: Displays the average progress of all the goals from all the entities of the portfolio plan.
  - Progress by <entity type of the portfolio plan>: Displays the average progress (in percentage) of total goals by each entity type of the portfolio plan. For example, if the portfolio plan is of entity type department, the widget shows the average progress of total goals in each department.
  - Status: Displays your goals based on their status (example, Red, Green, and Yellow).
  - Status by <entity type of the portfolio plan>: Displays your goals status by each entity type of the portfolio plan. For example, if the portfolio plan is of entity type department, the widget shows the goals status in each department.
  - Total goals: Displays the number of total goals defined for the portfolio plan.
  - Not aligned to parent goals: Displays the goals that aren't directly associated with its parent goal or any of the entities of the portfolio plan. Associate such goals with the parent goal or the entities so that the effort is visible.

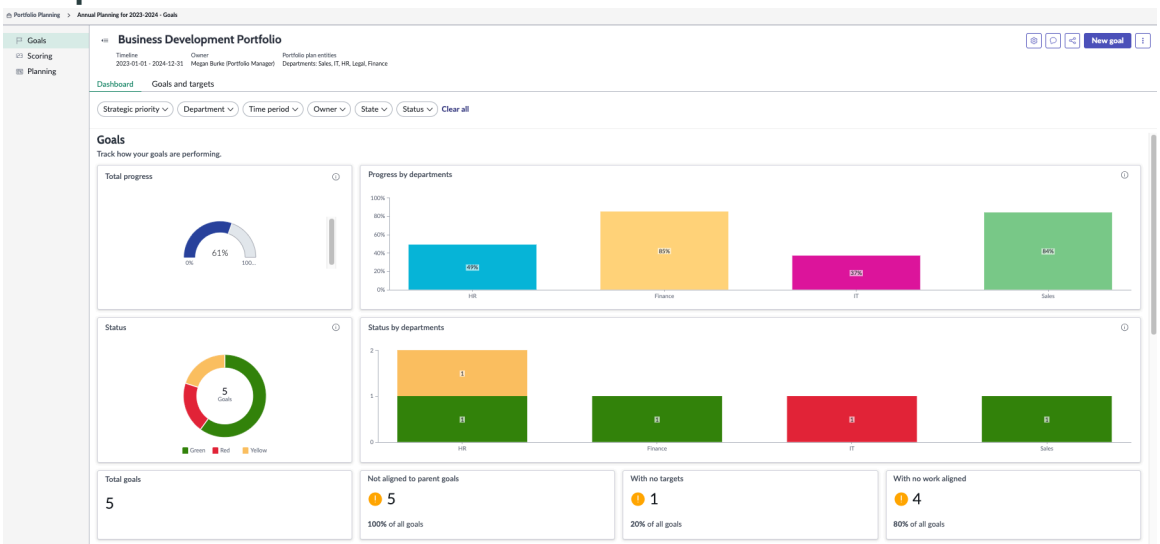
    Note:
    Associating a goal with the parent goal is optional.

  - With no targets: Displays the goals that don't have targets set for them. Set targets for such goals to achieve them.
  - With no work aligned: Displays the goals that aren't associated with work. You can associate work items (Project, Demand, and Epic) with goals so that the work being done to accomplish goals and meet targets is easily visible.

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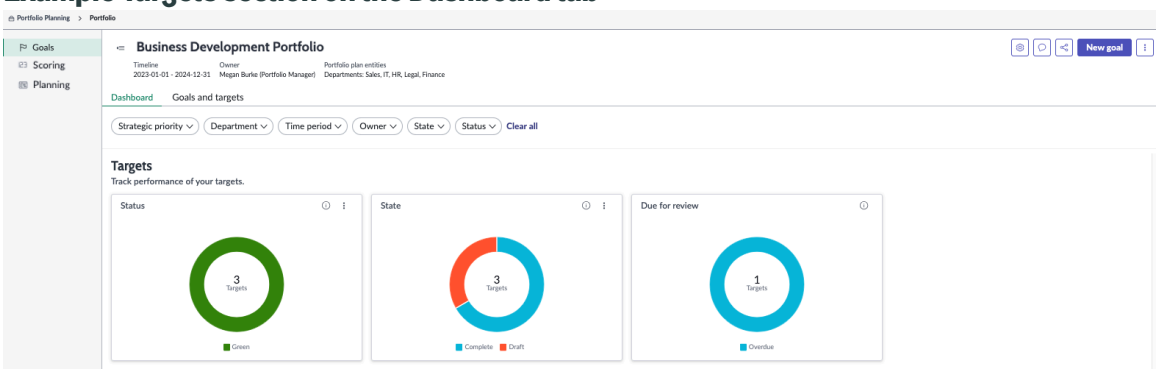
The “Not aligned to parent goals,” “With no targets,” and “With no work aligned” cards help you review and define the goals in the system properly from the alignment perspective. After goals are defined and aligned, you can choose to hide these cards.

Example Goals section on the Dashboard tab



- Targets: A section with multiple widgets that help you view and manage your targets set for the portfolio plan.
  - Status: Displays your targets based on their status. The status indicates whether the target is likely to be completed by the planned end date.
  - State: Displays the state of the targets from all the entities of the portfolio plan.
  - Due for review: Displays the targets that are due in a week or already overdue from their respective review due date perspective. The **Check-in due date** field on the target form helps you to update your targets periodically based on their check-in frequency.

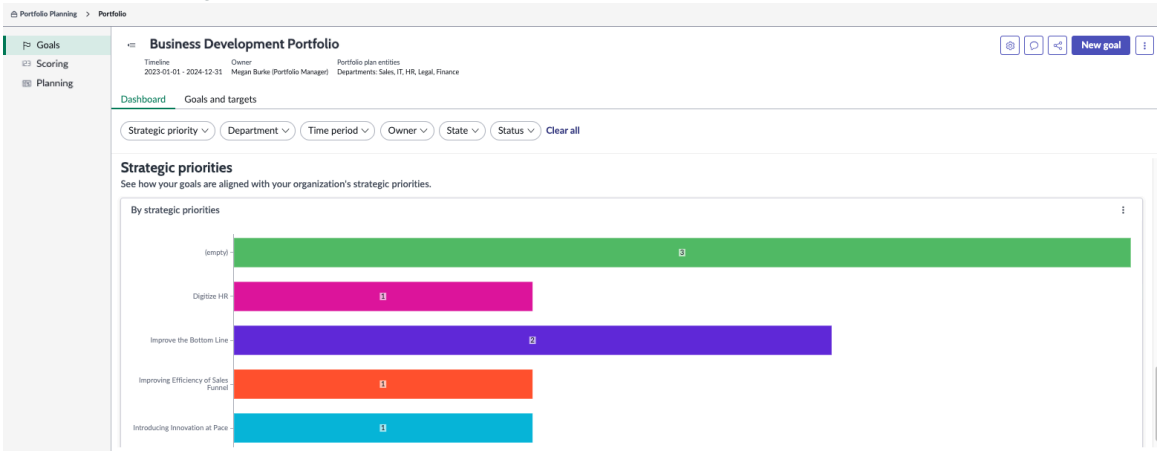
Example Targets section on the Dashboard tab



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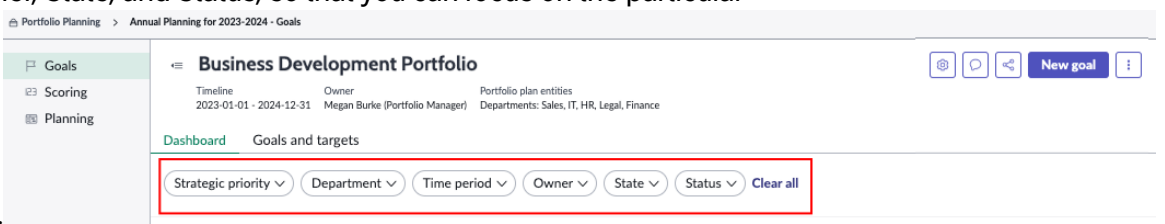
- Strategic priorities: A section with the By strategic priorities widget that helps you view how your goals are aligned with your organization's long-term strategies and manage them.

Example Strategic priorities section on the Dashboard tab



Filtering data of the portfolio plan

Use the filtering options on the Dashboard tab to filter the data of the goals and targets by their Strategic priority, entity type of the portfolio plan, Time period, Owner, State, and Status, so that you can focus on the particular information.



List view in the Goals and targets tab

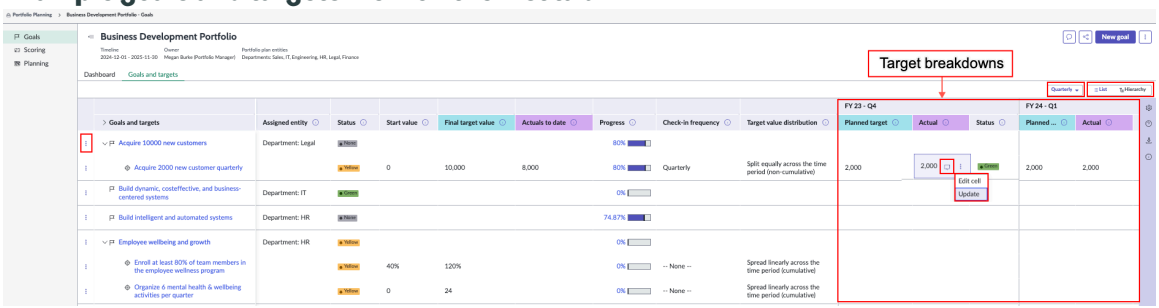
The List view helps you view, create, and manage your goals and targets of the particular portfolio plan. The List tab hides the downstream and upstream goals, enabling you to focus on only the goals and targets of the current portfolio plan. The List tab helps you update the actual values for your target breakdowns directly. However, you can view the downstream and upstream goals and targets from the Hierarchy tab. The following figure shows a sample goals list and indicates the different features for goals in Strategic Planning Workspace on the List tab.

- The row context menu icon ( ) gives you options for managing a goal such as create subgoal, set target, and align work for the selected goal.
- Assigned entity: Name of the entity to which the goal belongs.
- Personalize: Helps you customize the columns that you want to view on the List tab. Select the settings icon ( ) to enable the columns that you want to view on the List tab.
- Check-in frequency: Specifies the breakdown interval for the target. Breaking down the target into smaller periods (example, Quarterly) helps you set targets for each quarter and focus on the specific breakdown targets.
- Add remarks icon ( ): Specifies the remarks that were entered by the user for business justification when updating the breakdown actuals. Selecting the Remark icon opens the breakdown side panel with Details and Comments tabs.

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- Target breakdowns: Helps you view the details of target breakdowns in yearly or quarterly intervals. You can also enter or update the actual values in this window.
- Quarterly / Yearly: Helps to customize the view of target breakdowns quarterly or yearly.

Example goals and targets view on the List tab



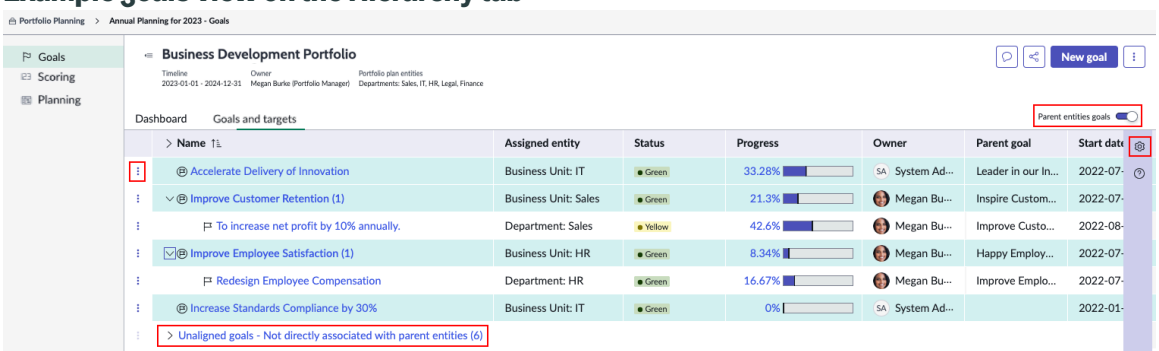
Hierarchy view in the Goals and targets tab

The Hierarchy view helps you view the goals and targets of the portfolio plan entities in a hierarchical manner. Also, the tab helps you view the goals of the parent entities (of the portfolio plan entities) along with the goals and targets of the current portfolio plan. For example, in the following figure, the departments are the portfolio plan entities and business units are their parent entities. Enabling the **Parent entities goals** option shows the goals of the parent entities (of the portfolio plan entities) along with the goals and targets of the current portfolio plan. Enabling the **Parent entities goals** option helps you plan and align your portfolio goals with the goals of the parent entities.

- Parent entities goals: Displays the goals of the parent entities (of the portfolio plan entities) that helps you plan and align your portfolio goals with the goals of the parent entities.
- Personalize: Helps you customize the columns that you want to view on the Hierarchy tab.

  Select the settings icon ( ) to enable the columns that you want to view on the Hierarchy tab.
- The row context menu icon ( ) gives you options for managing a goal such as create subgoal, set target, and align work for the selected goal.
- Unaligned goals - Not directly associated with parent entities: Lists the goals that aren't directly associated with the parent goals. You can open these goal records from the side panel and fill in the **Parent goal** field that is based on the goal of the parent entities that your goal belongs to.

Example goals view on the Hierarchy tab



Goals examples and recommendations

Business goals are an important part of establishing up priorities and setting a company for success. Understanding how to set achievable goals can greatly increase the ability to stay on track both in the short term and the long term for a company.

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The following are the examples for strategic priorities along with their goals and targets.

Examples for strategic priorities along with their goals and targets

Strategic Priority	Goal	Target
Enhance customer experience	Improve customer satisfaction	Achieve a customer satisfaction score of 90% or higher by Q4 2024
		Reduce customer complaints by 20% by the end of 2024
	Increase customer engagement	Increase active users on the platform by 15% within 12 months
		Increase customer retention rate by 10% by Q4 2024
Drive innovation and product development	Accelerate time to market for new products	Launch 3 new products or features per year starting from 2024
		Reduce the product development cycle from 12 months to 8 months by 2025
	Foster a culture of innovation	Allocate 15% of the annual budget to research and development
		Increase the number of innovation projects submitted by employees by 25% within 18 months
Expand market reach	Increase market share in key regions	Achieve 5% market share growth in the Asia-Pacific region by 2025
		Expand into 3 new international markets by 2026
	Build strategic partnerships	Establish 5 new strategic partnerships with local distributors or resellers by 2024
		Increase revenue from partnerships by 20% by the end of 2025
Strengthen operational efficiency	Optimize internal processes	Implement an enterprise resource planning (ERP) system by Q3 2024
		Reduce operational costs by 10% by 2025 through automation

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Examples for strategic priorities along with their goals and targets (continued)

Strategic Priority	Goal	Target
	Improve employee productivity	Increase employee satisfaction score to 85% by the end of 2024
		Reduce employee turnover by 15% by 2025

Recommendations to setup goals and targets

The following are the recommendations on how to setup goals and targets for an organization business growth.

Goal: Increase overall revenue and market share in 2024

Target 1: Expand market share by 10% in target regions

The following is the recommended setup for defining the target using the Target form in the workspace:

- Start date: 1/1/24
- End date: 31/12/24
- Type: Maximize
- Unit of measure: Percentage
- Start value: 40% (considering market share is already 40% by the end of 2023)
- Final target value: 50%
- Check-in frequency: Monthly or Quarterly
- Target value distribution: Spread linearly across the time period (cumulative)

Target 2: Launch four new products or services by the end of Q4

The following is the recommended setup for defining the target using the Target form in the workspace:

- Start date: 1/1/24
- End date: 31/12/24
- Type: Maximize
- Unit of measure: Count
- Start value: 0
- Final target value: 4
- Check-in frequency: Quarterly
- Target value distribution: Split equally across the time period (non-cumulative)

Target 3: Acquire 1,000 new enterprise customers

The following is the recommended setup for defining the target using the Target form in the workspace:

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- Start date: 1/1/24
- End date: 31/12/24
- Type: Maximize
- Unit of measure: Count
- Start value: 0
- Final target value: 1000
- Check-in frequency: Monthly or Quarterly
- Target value distribution: Split equally across the time period (non-cumulative) or Spread linearly across the time period (cumulative)

Goal: Improve customer satisfaction and retention

Target 1: Increase Net Promoter Score (NPS) from 70 to 85

The following is the recommended setup for defining the target using the Target form in the workspace:

- Start date: 1/1/24
- End date: 31/12/24
- Type: Maximize
- Unit of measure: Count
- Start value: 70
- Final target value: 85
- Check-in frequency: Monthly or Quarterly
- Target value distribution: Spread linearly across the time period (cumulative)

Target 2: Decrease customer churn rate from 12% to 8%

The following is the recommended setup for defining the target using the Target form in the workspace:

- Start date: 1/1/24
- End date: 31/12/24
- Type: Minimize
- Unit of measure: Percentage
- Start value: 12%
- Final target value: 8%
- Check-in frequency: Monthly or Quarterly
- Target value distribution: Spread linearly across the time period (cumulative)

Target 3: Conduct quarterly customer feedback surveys with a 60% response rate

The following is the recommended setup for defining the target using the Target form in the workspace:

- Start date: 1/1/24
- End date: 31/12/24
- Type: Maximize

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- Unit of measure: Percentage
- Start value: 0
- Final target value: 60%
- Check-in frequency: Quarterly
- Target value distribution: Spread linearly across the time period (cumulative)

Goal: Build strategic partnership channels

Target 1: Establish partnership with five new consulting firms

The following is the recommended setup for defining the target using the Target form in the workspace:

- Start date: 1/1/24
- End date: 31/12/24
- Type: Maximize
- Unit of measure: Count
- Start value: 0
- Final target value: 5
- Check-in frequency: Monthly or Quarterly
- Target value distribution: Spread linearly across the time period (cumulative)

Target 2: Generate $100K revenue through partners

The following is the recommended setup for defining the target using the Target form in the workspace:

- Start date: 1/1/24
- End date: 31/12/24
- Type: Maximize
- Unit of measure: Currency
- Start value: 0
- Final target value: 100K
- Check-in frequency: Monthly or Quarterly
- Target value distribution: Spread linearly across the time period (cumulative) or Split equally across the time period (non-cumulative). Set this option depending on whether you want to track the target progress individually for each month or quarter, or at an aggregated level.

Create a goal in Strategic Planning

Create goals for your portfolio plans and set targets to measure overall goal progress and align goals with your organizational strategic priorities.

Before you begin

Role required: sn_apw_advanced.spw_goal_user and sn_align_core.apw_user

About this task

Goals are typically qualitative by nature. Goals should be ambitious and are expected to motivate and challenge your teams.

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Only the owner or contributors of the goal can edit the goal.

Note:
If you have created goals but don't see them appearing in the portfolio plan, populate the Assigned entity type and Assigned entity fields on the Goal form to display those goals in the portfolio plan.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select a portfolio plan that you want to create a goal for.
3. From the Goals page, select **New goal**.
4. On the form, fill in the fields.
   For a description of the field values, see Goal form.
5. Select **Save**.
   You can also select **Save and add target** and add a target for the goal on the flow. For a description of the field values for a target, see Target form.

What to do next
Set targets for the goals. For more information, see Create targets for a goal in Strategic Planning or Configuring target source for target automation.

Create targets for a goal in Strategic Planning

Create SMART targets for goals to track and measure the progress of your goals.

Before you begin
Role required: sn_apw_advanced.spw_goal_user and sn_align_core.apw_user

About this task
Configuring a target source for your target updates the **Actuals to date** field on the Target form automatically.

A SMART target can be defined as S = Specific, M = Measurable, A = Attainable, R = Relevant, and T = Time-bound.

Note:

- Only the owner or contributors of the goal can create targets for the goal.
- You can also restrict the access for a target record to the specific users by enabling the **Confidential** field on the Target form if the ServiceNow® ESG Management application is installed.

Procedure

1. Create a target for a goal using one of the following options.

2. On the form, fill in the fields.
   For a description of the field values, see Target form.
3. Select **Save**.
   You can also select **Save and add new target** and add more targets for the goal on the flow.

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Result
The target progress records are automatically created when you save the target post populating the **Actuals to date** field. The target progress records specify the progress of each target for the goal.

Note:
When you delete a goal, its associated targets (if any) and their progress records are also deleted even though the **Allow the deletion of targets** property is set to **No**.

What to do next
Update the progress of the target manually if the target is not enabled for target automation.

Update the progress of a manual target

Update the progress of a target when its status is changed.

Before you begin
Role required: sn_apw_advanced.spw_goal_user and sn_align_core.apw_user

About this task

Note:
Only the owner or contributors of the goal can update a goal target.

Procedure
1. Open the target record of the goal using one of the following options.
2. On the form, update the **Actuals to date** field and add a business justification in the **Remark** field.

   For a description of the field values, see Target form.
3. Select either **Update** or **Save**.

Result
After the **Actuals to date** field is updated, the progress value for the target and its goal is auto-updated. For information on how the progress value is calculated, see progress value calculation. For information on how the progress value is calculated for a target that has target breakdowns, see Target breakdowns in Strategic Planning.

Related topics
- Update the actual value of a target breakdown
- Update the progress of an automated target

Update the progress of an automated target

Update the progress of a target using the **Update Actual value** related link on the Target form.

Before you begin
Role required: sn_apw_advanced.spw_goal_user and sn_align_core.apw_user

About this task

Note:
Only the owner or contributors of the goal can update a goal target.

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Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select the required portfolio plan that the target belongs to.
3. In the Goals view, select the **Goals and targets** tab.
4. Select the target that you want to update the progress for.
   The Target side panel opens with the **Details** tab.

   If the target has breakdowns, selecting the target opens the Target side panel with the **Progress** tab. Select the **Details** tab on the Target side panel.
5. From the side panel, select **Full Details** to open the target form.
6. On the Target form, select the **Update Actual value** related link.
   For a description of the field values, see Target form.

Result

After the **Actuals to date** field is updated, the progress value for the target and its goal is auto-updated. For information on how the progress value is calculated, see progress value calculation. For information on how the progress value is calculated for a target that has target breakdowns, see Target breakdowns in Strategic Planning.

Related topics

Update the progress of a manual target

Update the actual value of a target breakdown

Create a copy of a goal or target

Create a copy of an existing goal or target to align goals with your organizational strategic priorities. If the goal or target you want to create is similar to an existing one, copying the existing record saves your time.

Before you begin

Role required: sn_apw_advanced.spw_goal_user and sn_align_core.apw_user

About this task

Goals are typically qualitative by nature. Goals should be ambitious and are expected to motivate and challenge your teams.

Only the owner or contributors of the goal can edit the goal.

Note:
If you have created goals but don't see them appearing in the portfolio plan, populate the Assigned entity type and Assigned entity fields on the Goal form to display those goals in the portfolio plan.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select a portfolio plan that you want to create a goal for.
3. From the Goals page, select **Goals and targets** and then select **List** or **Hierarchy** view.
4. Select the Row context menu icon (⋮) of the goal or target that you want to copy and then select **Duplicate**.

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- For a goal, the Goal modal opens with all details of the goal you copied from. You can update the details for the goal as needed and then select **Save** to save the goal or select **Save and add a target** to save the goal and add a target for the goal. For a description of the field values, see Goal form.
- For a target, the copied target appears right under its goal. Note that this action doesn't copy the target actuals. You can open the target record and update the details as needed and then save the target for the goal. For a description of the field values, see Target form.

By default, the name is *Copy of ABC* where ABC is the name of the goal or target you copied from.

What to do next

Set more targets for the goals. For more information, see Create targets for a goal in Strategic Planning or Configuring target source for target automation.

Target actuals automation

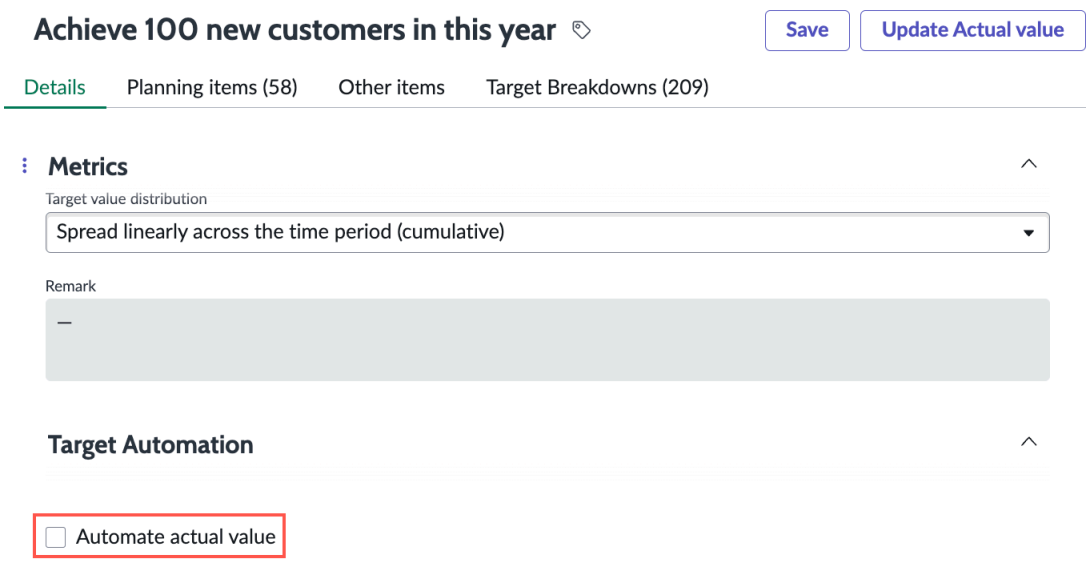
Automate the actual value for your targets using the target automation feature.

https://player.vimeo.com/video/1077953139?h=93de7e6865&badge=0&autopause=0&player_id=0&app_id=58479%0Ahttps://youtu.be/pd0dWCbHRkA

Use the following steps as guidelines to enable actuals automation and configure a target source for a target using the target automation feature.

You must perform the following steps on the Target form to enable target automation for the target.

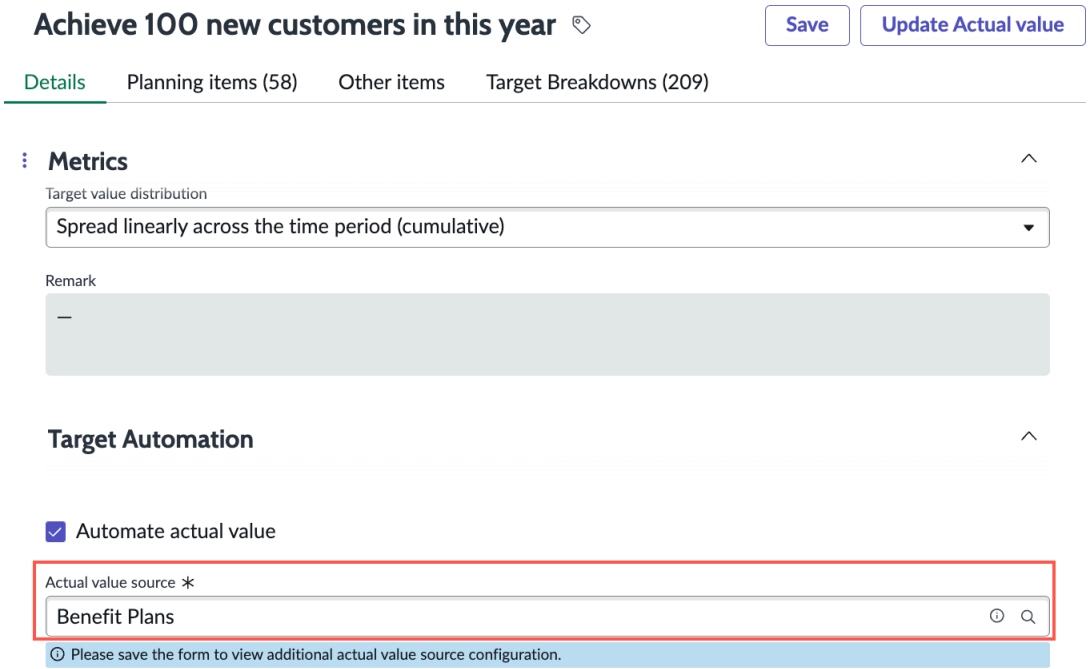
1. Enter the Start value, Final target value, and Check-in frequency, and fill the other required fields for the target.
2. Select the **Automate actual value** field.



3. Select a target source in the **Actual value source** field, from which the value must be fetched for target automation.

   A target source is a configuration (of a custom script, PA indicator, or Assessments) for a target to auto-update the actual value of the target, so that the progress of the target and its goal are auto-updated.

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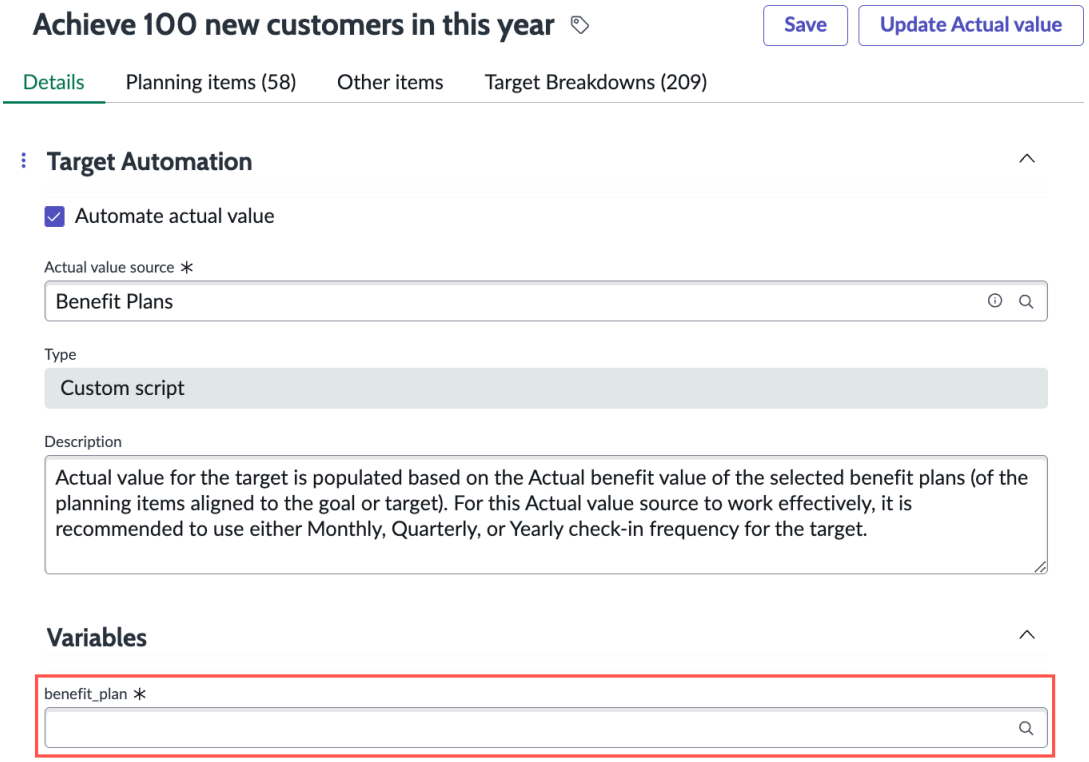
You can select either the Benefit Plans option or a custom target source as a target source for the target. After selecting a target source, save the target record to view additional actual value source configuration.

- Benefit Plans target source - A target source that is created using a custom script where the actual benefit value of benefit plans of the planning items associated with the goal or target fetches the target actuals. Then the application updates the actual value of the target based on the actual benefit value.

  When you select Benefit Plans target source (predefined target automation script for benefit plans) as the Actual value source for the target, the **benefit_plan** field appears in the Variables section, from which you can select the required benefit plans for fetching the value and automating the actual value of the target.

  Note:
  Only benefit plans of the planning items associated with the goal or target will be available to select in the **benefit_plan** field as a source for target automation.

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- Custom target source - Create a custom target source and configure it as a source to update the actual value of the target. For instructions on how to create a target source, see Create a target source.

For instructions on creating targets for a goal, see Create targets for a goal in Strategic Planning.

Target breakdowns in Strategic Planning

Breaking down a target into smaller periods (for example, Monthly) helps you set a target value for each month and focus on that specific monthly target. The target breakdowns are automatically created based on the Check-in frequency and Target value distribution set for the target.

The check-in frequency for a target can be set to Daily, Weekly, Monthly, Quarterly, or Yearly. Based on the Check-in frequency of the target, the corresponding target breakdowns are created. For example, if the Check-in frequency is set to Monthly for a target spanning for a year, 12 monthly target breakdowns are created. Planned target values are automatically set for each target breakdown based on the Target value distribution setting of the target.

Note:
The target breakdowns feature isn't supported for qualitative targets.

The following examples help you understand how the target progress is calculated for targets with different target distribution type.

Example 1: Acquire 1200 new customers in the calender year 2025 (Track non-cumulatively)

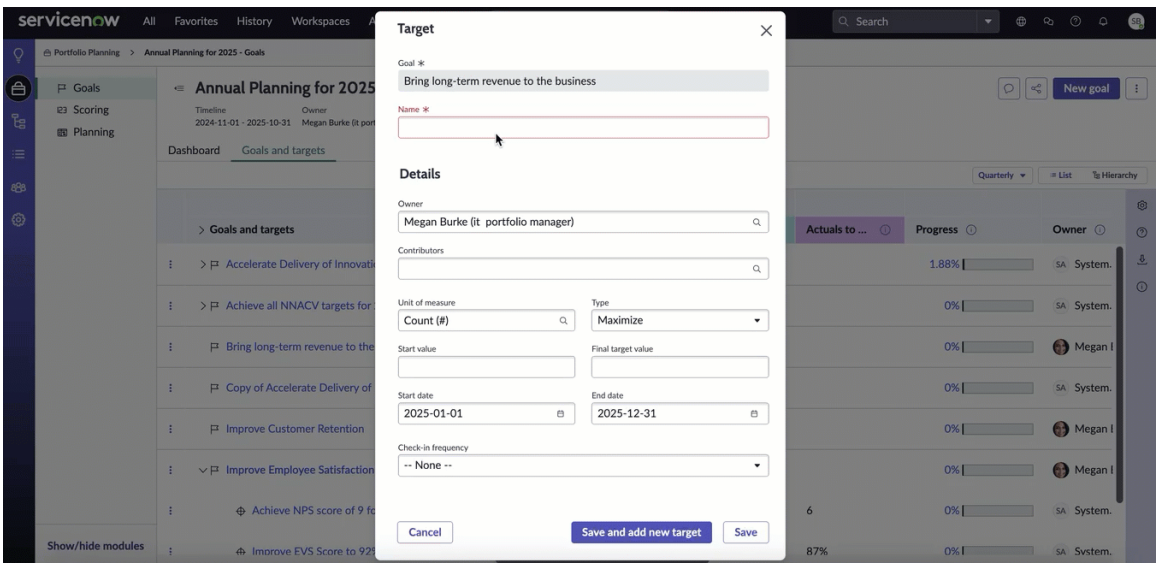
In this example, you want to achieve a target of acquiring 1200 new customers in the calender year 2025 and track the progress monthly (non-cumulatively), then you can set the target as the following:

- Set the start date and end dates to 2025-01-01 and 2025-12-31, respectively
- Set the start value and final target values to 0 and 1200, respectively

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- Set the Check-in frequency for the target to Monthly
- Set the Target value distribution to Split equally across the time period (non-cumulative)

  This Target value distribution means that the final target value is divided into 12 equal values (planned target value for each target breakdown) which aggregates to the final target value. You can edit the planned target value later from the respective target breakdown record as needed.



In this case, the application creates 12 target breakdowns (January, February, ……., and December) for calender year 2025 and sets the Planned target value for each target breakdown to 100 (Final target value divided by the number of target breakdowns).

Because the application sums up the actual value entered in each monthly target breakdown, you must enter the actual value that is achieved in the particular month for the target breakdown. For example, you acquired 100 customers in January, then enter 100 as the actual value in the January target breakdown. And, you acquired another 100 customers in February, then enter 100 as the actual value in the February target breakdown. Similarly, if you acquired another 100 in March and 100 in April, then enter 100 as the actual value in both the March and April target breakdowns.

The application sums up the actual values entered in each monthly target breakdown and rolls up the sum value to the actual value of the main target. Then, the progress of the target and its goal are auto-updated.

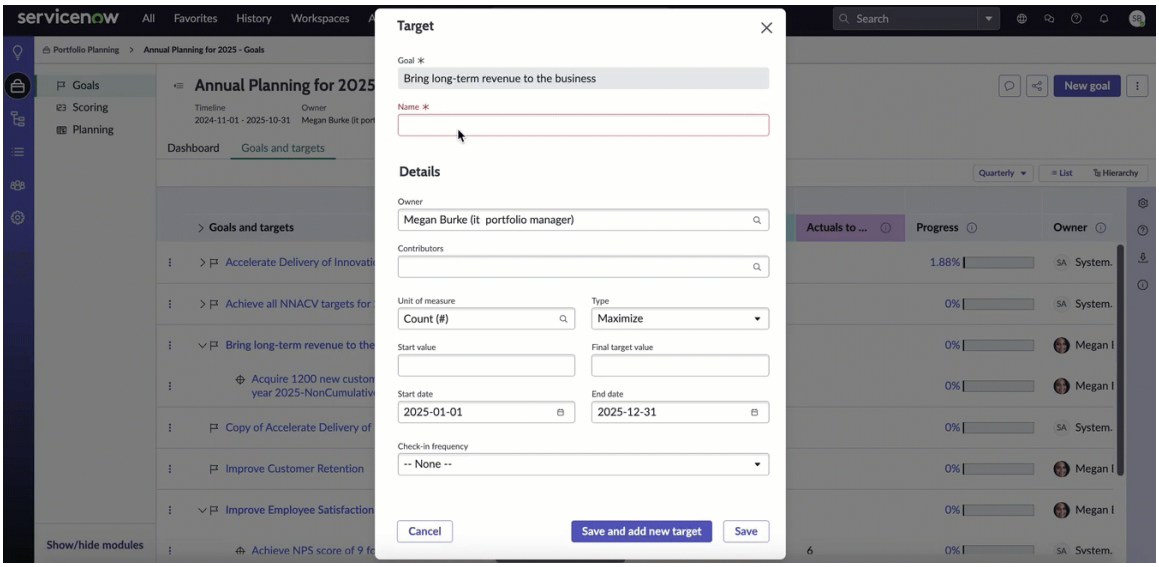
Example 2: Acquire 1200 new customers in the calender year 2025 (Track cumulatively)

In this example, you want to achieve a target of acquiring 1200 new customers in the calender year 2025 and track the progress monthly (cumulatively), then you can set the target as the following:

- Set the start date and end dates to 2025-01-01 and 2025-12-31, respectively
- Set the start value and final target values to 0 and 100, respectively
- Set the Check-in frequency for the target to Monthly
- Set the Target value distribution to Spread linearly across the time period (cumulative)

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This Target value distribution means that the final target value is divided linearly into 12 planned target values (such a way that the value for the last monthly breakdown is equal to the final target value). You can edit the planned target value later from the respective target breakdown record as needed.



In this case, the application creates 12 target breakdowns (January, February,……., and December) for calender year 2025 and sets the Planned target value for the January, February,……., and December breakdowns to 100, 200,……., and 1200 respectively.

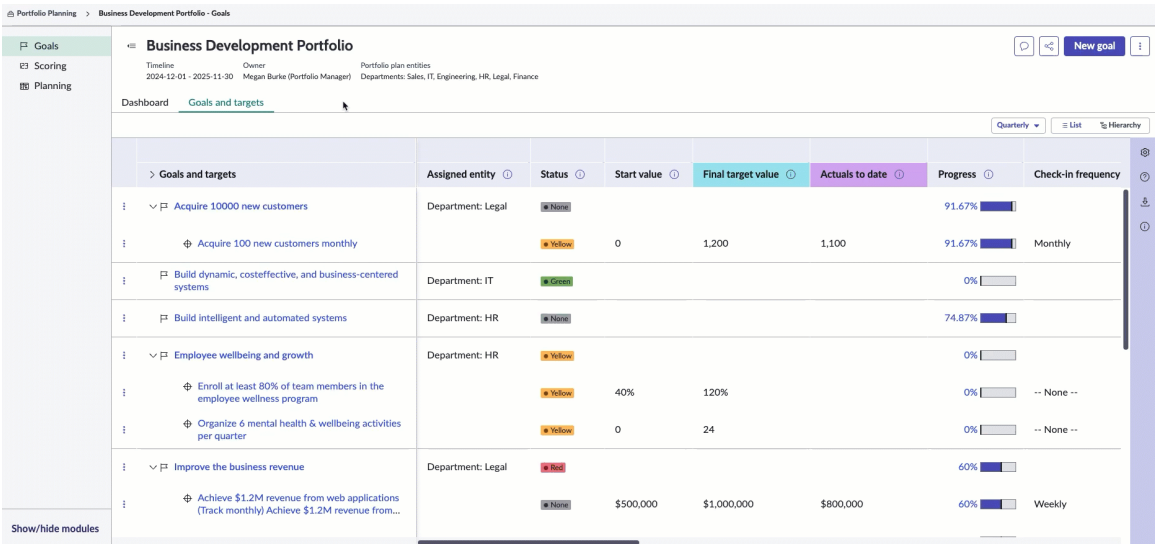
Because the application considers only the actual value entered in the latest monthly target breakdown, you must enter the cumulative actual value in the latest monthly target breakdown. For example, you acquired 100 customers in January, then enter 100 as the actual value in the January target breakdown. And, you acquired another 100 customers in February, then enter 200 as the actual value in the February target breakdown. Similarly, if you acquired another 100 in March and 100 in April, then enter 300 and 400 as the actual value in the March and April target breakdowns, respectively.

The application considers the actual value entered in the latest monthly target breakdown and rolls up to the actual value of the main target. Then, the progress of the target and its goal are auto-updated.

Graphical visualisation of target progress

The **Progress** tab in the target's side panel provides graphical visualization for the trend of the target progress based on the planned target value and the actual value of the breakdowns. You can also edit the planned target and view the check-in history of the target actuals from the **Progress** tab.

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Benefits of target breakdowns

The target breakdowns feature helps you when you want to set a target for a period but want to track the progress of the target in smaller periods such as daily, weekly, monthly, quarterly, and yearly. For example, you have set a target for a year with start value and final target values of 0 and 1200, respectively. Also, you want to set monthly targets of 100 for each quarter. In this case, you can break down the target into monthly targets and set a target value for each month so that you can focus on the specific monthly target and update your actuals against those monthly targets.

The target breakdowns feature has the following benefits:

- Break down the long-term targets into short-term intervals such as Daily, Weekly, Monthly, Quarterly, and Yearly for a better tracking or reporting of your progress
- Set or modify a planned target value for each target breakdown as needed
- Update the actual value for each target breakdown and track the progress of the main target
- Focus on the specific short-term target (target breakdown) rather than the whole target
- Track the progress of your short-term and long-term targets cumulatively or non-cumulatively
- Visualize the trend of the target's process wrt the planned target in the line or bar chart

How the actual value is calculated when the check-in frequency set to None

When the check-in frequency is set to None for a target, the actual value must be entered in the **Actuals to date** field in the main target record. The actual value entered must be cumulative irrespective of the time period of the target. Target breakdowns aren’t created when the check-in frequency is set to None.

Target breakdowns in target automation

If you’ve enabled the target automation feature for a target and set the check-in frequency and Target value distribution, the target automation feature automatically updates the actual value in the respective target breakdown based on the check-in due date. After the actual value of a target breakdown is updated, the value is rolled up to rolls up to the actual value of the main target. Then, the progress of the target and its goal are auto-updated.

Update the actual value of a target breakdown

Update the actual value of a target breakdown when its status is changed.

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Before you begin
Role required: sn_apw_advanced.spw_goal_user and sn_align_core.apw_user

About this task
Updating the actual value of a target breakdown automatically updates the actual value of its target. After the **Actual to date** field of the target is updated, the progress value for the target and its goal are auto-updated.

Note:
Only the owner or contributors of the goal can update the target breakdowns.

Procedure
1. Open the target record of the goal using one of the following options.

2. On the form, update the **Actual** field for the target breakdown and add a business justification in the **Remark** field.
   For a description of the field values, see Target Breakdown form.
3. Select **Save**.

Result
After the **Actual** field is updated, the progress value for the target and its goal are auto-updated. For information on how the progress value is calculated, see progress value calculation. For information on how the actual value of the target breakdown is rolled up to its target, see Target breakdowns in Strategic Planning.

Related topics
Update the progress of a manual target

Update the progress of an automated target

Associate a planning item with goals or targets

Create a goal or target relationship with a planning item or any other item to identify and associate your current or future work and achieve your goals and targets.

Before you begin
Role required: sn_apw_advanced.spw_goal_user and sn_align_core.apw_user

About this task
You can associate a goal or target with the planning items - Project, Demand, and Epic.

From the Align work window, you can associate a goal or target with multiple planning items at a time. From the Planning items tab of the goal or target, you can associate a goal or target with only one planning item at a time.

You can create goal or target relationships with a custom planning item from the Align work window only if the planning item table is added to the *planning_item_types_allow_list* property. For more information, see Enable custom item types in Strategic Planning.

Note:
When a goal or target relationship is created with a planning item (Project, Demand, or Epic), the record appears on the Planning items tab on the goal record. When a goal or target relationship is created with any other item, the record appears on the Other items tab on the respective goal or target record.

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Procedure

1. Open the Goal/Target Relationship form using one of the following options.

2. Select either **Done** or **Save**.

Associate or update the primary goal or target for a planning item

Associate a primary goal or target for the planning items where the items contribute to achieving the goal or target.

Before you begin

Role required: sn_apw_advanced.spw_goal_user and sn_align_core.apw_user

About this task

You can associate a goal or target as primary with a planning item by populating the **Primary goal** and **Primary target** fields on the Planning item form respectively. When you populate the **Primary target** field, the **Primary goal** is automatically populated with the goal of the populated target. For more information, see Planning item form.

After you associate planning items with goals or targets, you can check these relationships directly on the Planning items tab of the goal's form or on the Goal/Target Relationships tab of the planning item's form.

Note:

- By default, the goal or target becomes the primary when you associate a goal or target with a planning item for the first time. Then after, association of any goal or target with the planning item becomes a secondary association unless the **Primary** field is selected while associating the goal or target.
- When a planning item already has a primary goal association and you want to make another goal as primary, the existing primary goal association becomes secondary and the fresh association becomes primary for the planning item.
- Associating the primary goal or target isn't supported for strategic items such as initiatives and strategic programs.
- To associate the primary goal or target with a custom planning item, ensure that the custom planning item is added to the *planning_item_types_allow_list* property.

Procedure

1. Open the required planning item form using one of the following options.

2. On the Item details side panel or **Details** tab, fill in or update the **Primary goal** and **Primary target** fields with the goal and target respectively that you want to associate or update.

   Alternatively, you can select **Add** in the **Goal/Target Relationships** tab, populate the **Goal** and **Target** fields as needed, and then select **Primary**. The **Primary goal** and **Primary target** fields are then automatically populated on the planning item form.

   For a description of the field values, see Planning item form.

3. Select either **Update** or **Save**.

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What to do next

If you want to remove the existing goal or target association, you can remove the association by selecting the association record and selecting the **Remove** option on the Goal/Target Relationships tab of the planning item record. If the planning item has the primary goal and secondary goal association, you can remove the primary association only after you make any other goal as primary for the planning item.

Export goals and targets data to Excel or CSV

Export the data of goals and targets from your portfolio plan into a Microsoft Excel or CSV file. You can share this data and collaborate with your business stakeholders.

Before you begin

Role required: sn_apw_advanced.spw_goal_user and sn_align_core.apw_user

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Goals**.
3. From the Goals page, select **List** view.
4. Verify that the columns you want to export are personalized.

   Note:
   If the filters are applied on the view, the filtered data is exported. Also, to differentiate between goal and target record in the exported file, select **Record type** in the personalized side panel.

5. Use the Personalize side panel to export the data of your goals and targets.

   a. Select Export icon ( ).

   b. From the **File type** drop-down on the Export window, select **Excel** or **CSV** to export the data to a Microsoft Excel or CSV file respectively.
   The data is exported into the selected file format. By default, the name of the file is *ABC_goals_and_targets_list* where ABC is the name of the portfolio plan you exported the data from.

Prioritizing portfolio plan work in Strategic Planning Workspace

Review the work pipeline for your portfolio in Strategic Planning Workspace. Add, update, and rank planning items so that you can prioritize the right work for the right time.

Prioritization views

Prioritization page in Strategic Planning represents your backlog, showing the items of your work pipeline in List, Kanban, and Hierarchy views. For an overview of these views, see Prioritization in Strategic Planning.

Note:
The Prioritization feature is available only for portfolio plans.

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Planning items in the Prioritization tab

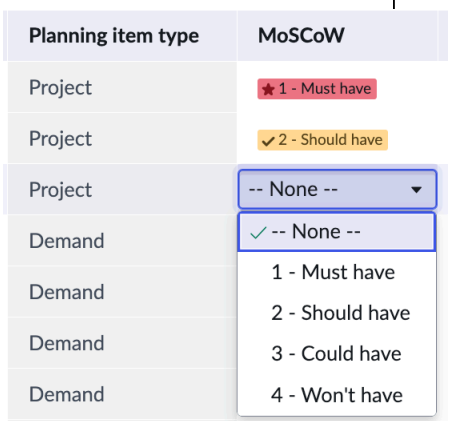
By default, portfolio plans show only the records that are created within the Planning Item [sn_align_core_planning_item] table and its child tables. Any records stored in other ServiceNow AI Platform tables aren't shown unless an integration is established.

Consider that you want to manage projects through a portfolio plan. Project records that are only stored in the Planning Item Project [sn_align_project] table are displayed in the Prioritization tab. But any projects created using the PPM Standard aren't shown by default because these project records are stored in the PPM Project [pm_project] table. To enable their display in Strategic Planning Workspace, set up integration with PPM so that the tables of Strategic Planning are mapped to the tables of PPM.

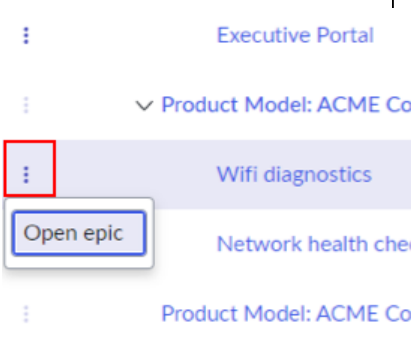
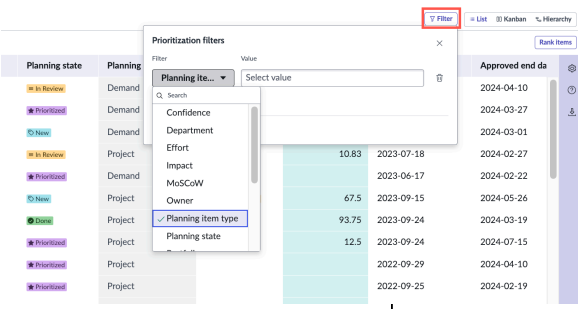
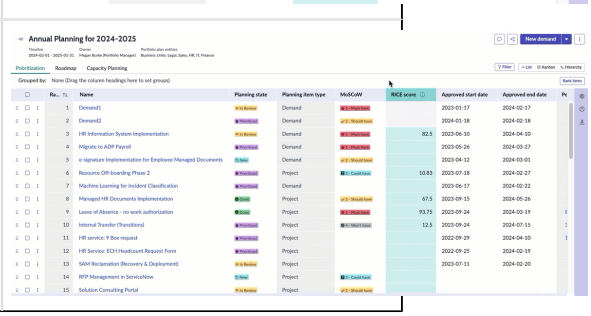
The same is the case with Epics created using Agile Development 2.0 and SAFe applications. See Configuring Strategic Planning with PPM, Agile 2.0, and SAFe.

Prioritization features

On the Prioritization page, you can perform the following actions:

Feature	Description	Example UI
Add new planning items	Add new items to your backlog directly from the Prioritization page. The type of planning items that you can create here depends on your portfolio plan configuration.	
Update planning item details	Edit details of the planning items, add attachments, and collaborate on them with the stakeholders directly from the Prioritization page to facilitate smoother real-time backlog grooming.	
MoSCoW values	Categorize planning items using the Must have, Could have, Should have, or Won't have (MoSCoW) values in the List and Hierarchy views. This categorization creates a baseline of priority that you can later use when you're grooming and prioritizing work for your portfolio.	
Rank planning items	Decide on the order of priority for the planning items by	

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Feature	Description	Example UI
	using the drag functionality to rearrange them.	
Prioritize items to roadmap	Set the planning state of an item to **Prioritized** to add them to the portfolio's roadmap.	
Open the planning item in the Execution app	If you're using ServiceNow PPM, Agile Development 2.0, or SAFe applications to execute the planned work, you can open the planning items in their own application. For example, if your planning item is an epic, you can navigate to the epic form directly from the Prioritization page.	
Personalize the Prioritization page views	Change the way that the Prioritization page is displayed so that you can view the information in the format that you need. All settings, such as row and column personalization, grouping, and sorting, are saved as the portfolio plan preferences. So, these settings are applied to all the users or user groups that the portfolio plan is shared with.	
Apply filters for Prioritization	Apply filters to all the views of Prioritization, Roadmap, or Scoring so that you can view a consistent data set for your portfolio plan.	
Reorder the columns by dragging them horizontally	Reorder the position of the columns on the List and Hierarchy view by dragging them horizontally.	

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Add planning items to Prioritization page of Strategic Planning Workspace

Add new planning items to your portfolio plan's work backlog in Strategic Planning Workspace and ensure that the work pipeline is current.

Before you begin

Create a portfolio plan in Strategic Planning

Role required: sn_align_core.apw_user

About this task

Use the Prioritization page of your portfolio plan to add new planning items or import them from other ServiceNow execution system such as PPM, Agile Development 2.0, or SAFe.

You can use the List, Kanban, or the Hierarchy views while you perform this task.

Procedure

1. Navigate to **All** > **Strategic Planning** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. From the Prioritization page, add a new planning item for your portfolio plan.

   Use the More options drop-down to select the planning item that you want to create.

4. On the form, fill in the short description and approved dates.
   For full information, see Planning item form.
5. Select **Submit**.
6. **Optional:** If you're using PPM, Agile Development 2.0, or SAFe to execute the planned work, you can also import your work items from these applications.
   For more information, see Executing Strategic Planning work in PPM, Agile 2.0, and SAFe.

Result

The new item is created with its **Planning state** field is set to **New** and the position of the item is based on the view that you are in.

- List view: Added to the bottom of the list.
- Kanban view: Added to the **4-Low priority** horizontal lane.
- Hierarchy view: Added to the appropriate grouping.

  For example, your selected lens is Organization. Then, the new item is added to the grouping of its department.

What to do next

- Rank planning items in Strategic Planning.
- Update planning item details from Prioritization page of Strategic Planning Workspace.
- Learn about Personalizing Prioritization page views in Strategic Planning

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Create a copy of an existing planning item in Strategic Planning

Create a copy of an existing planning item to add it to your portfolio plan's work backlog in Strategic Planning Workspace and ensure that the work pipeline is current. If the planning item you want to create is similar to an existing planning item, copying the existing planning item saves your time.

Before you begin

Create a portfolio plan in Strategic Planning

Role required: sn_align_core.apw_user

About this task

Use the Prioritization page of your portfolio plan to add new planning items or import them from other ServiceNow execution system such as PPM, Agile Development 2.0, or SAFe.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. From the Prioritization page, select **List** view.
4. Select the More actions icon (⋮) of the planning item that you want to copy and then select **Duplicate**.
   The new planning item is created and the item appears right below the planning item you copied from. Also, the rank is updated for the new planning item automatically based on the rank of the planning item you copied from.

   By default, the name is *Copy of ABC* where ABC is the name of the planning item you copied from.
5. **Optional:** If you're using PPM, Agile Development 2.0, or SAFe to execute the planned work, you can also import your work items from these applications.
   For more information, see Executing Strategic Planning work in PPM, Agile 2.0, and SAFe.

What to do next

- Rank planning items in Strategic Planning.
- Update planning item details from Prioritization page of Strategic Planning Workspace.
- Learn about Personalizing Prioritization page views in Strategic Planning

Update planning item details from Prioritization page of Strategic Planning Workspace

Update the details of your planning items or delete them so that your Strategic Planning Prioritization page reflects the latest work pipeline.

Before you begin

Role required: sn_align_core.apw_user

About this task

Update the details of a planning item using the List, Kanban, and Hierarchy views in the portfolio Prioritization page. Edit the details inline from the grid view or use the side panel. You can edit details such as short description, MoSCoW, approved dates and others to facilitate smoother real-time backlog grooming. Use the full details page of the planning item to add attachments and collaborate on them with the stakeholders.

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Procedure

1. Navigate to **All** > **Strategic Planning** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. From the Prioritization page, select **List**, **Kanban**, or **Hierarchy** view.
4. Update item details, attach files to the item, or delete the item.

   Information of certain columns that aren't editable in the full details page, can't be edited inline too. For example, planned cost and planned benefit. These cells are visually differentiated using grey color as their background.

   If you group the Prioritization items list by any attribute, you can't edit the short description of the items directly from the grid view.

Rank planning items in Strategic Planning

Rank the planning items that are added to the pipeline of your portfolio plan to decide on their priority so that you can start prioritizing work for your portfolio.

Before you begin

- Create a portfolio plan in Strategic Planning.
- Ensure that the planning items in the Prioritization List view are sorted by the Rank column in ascending order.

Role required: sn_align_core.apw_user

About this task

Important:
Use the List view to stack-rank the planning items of your portfolio plan.

Within the ServiceNow system, all the planning items are assigned a global rank. Reorder the items in the Prioritization page to change their rank and update their planning state. If you decide to include a planning item into your roadmap schedule, mark its Planning State as **Prioritized** to add it to the roadmap directly from the Prioritization page.

The Rank column helps you quickly identify the rank of an item relative to the other items in the backlog. This information is useful to determine the top-ranked items from a long list of planning items. When there's no custom grouping or sorting, the planning items are sorted by their rank, and you can reorder the rows.

Note:
Reordering of rows is not allowed if the planning items are already grouped or sorted by any other attribute. Remove the grouping or sorting to reorder rows.

Procedure

1. Navigate to **All** > **Strategic Planning** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. From the **List** view of the Prioritization tab, rank the planning items according to your priority by rearranging their order.

   Repeat this step until the ranking of the planning items align with your business priorities. To get better visibility of data that you need:

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- Sort or group the list by the required columns. See Personalize List view of Prioritization page of Strategic Planning Workspace
- Filter the planning items by applying filters.

Tip:

Using the Row context menu ( ), you can also assign the highest and lowest ranks to the planning items using the **Move to top** and **Move to bottom** options respectively.

What to do next

Prioritize work

Prioritize work

Review and prioritize the items of your portfolio plan pipeline to add them to the plan's roadmap so that your teams can start working on them.

Before you begin

- Create a portfolio plan in Strategic Planning.
- Ensure that the planning items in the Prioritization tab are sorted by the Rank column in ascending order.

Role required: sn_align_core.apw_user

About this task

Review and prioritize the items in the Prioritization, Kanban, or Hierarchy tab during your grooming sessions. You can use the MoSCoW values assigned to an item to help you decide the priority of work.

Procedure

1. Navigate to **All** > **Strategic Planning** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. From the Prioritization tab or any other tab, mark a planning item as In Review or Prioritized.

   After you mark a planning item as **Prioritized**, it's automatically added to your portfolio roadmap, based on the values in the **Approved start date** and **Approved end date** fields. Your roadmap shows only those items that have their Planning state set to **Prioritized**.

   - If the dates fall within the portfolio planning period, then the item is displayed on the roadmap.
   - If either of the date fields is empty, then the item is added to the Unscheduled items list of the roadmap.

   If you've marked an item as **Done** or **Cancelled**, that item isn't displayed on the Prioritization page by default. You can update the filter on the Planning state column to show the items that are completed or canceled.

4. **Optional:** From the Prioritization tab, you can update the planning state of multiple items at once.

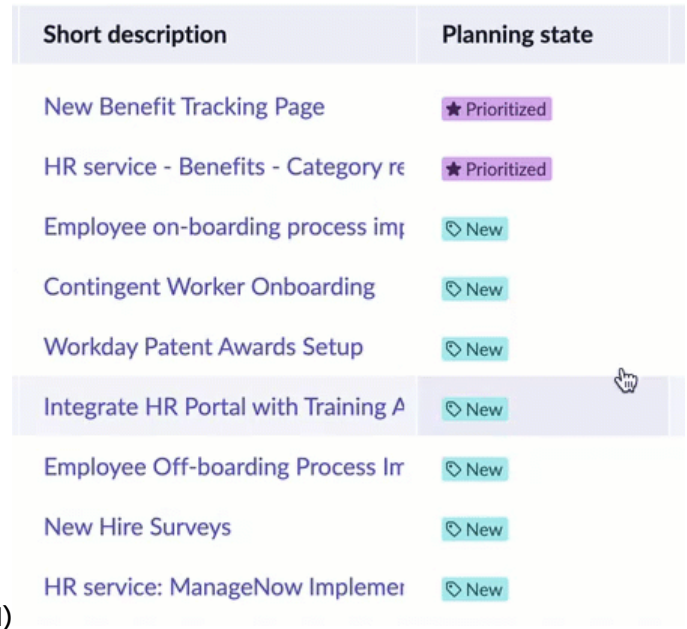
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a. Select the **Planning state** cell of one of the rows that you want to update.

b. Press and hold the **Ctrl** key (for Windows OS) or **command** key (for Mac OS), and select the **Planning state** cells of the other rows that you want to update.

c. Double-click one of the selected cells and choose a state.

(Optional)



Categorize planning items using tags

Categorize your planning items based on your requirement by adding tags.

Before you begin

Create a portfolio plan in Strategic Planning

Role required: sn_align_core.apw_user

About this task

Tags enable you to categorize planning items. You create the tag name, which should name the reason for the tag. You can make the tags visible to everyone, some people, or just yourself. The visibility setting specifies who can use the tags to search for planning items.

Any tagging additions or removals made to a planning item are automatically synced across all views in the Planning page and in the Scoring page. After tagging planning items, you can use the tags to search for planning items using the **Filter** option (Filter) in the List view of Prioritization and in the Scoring page.

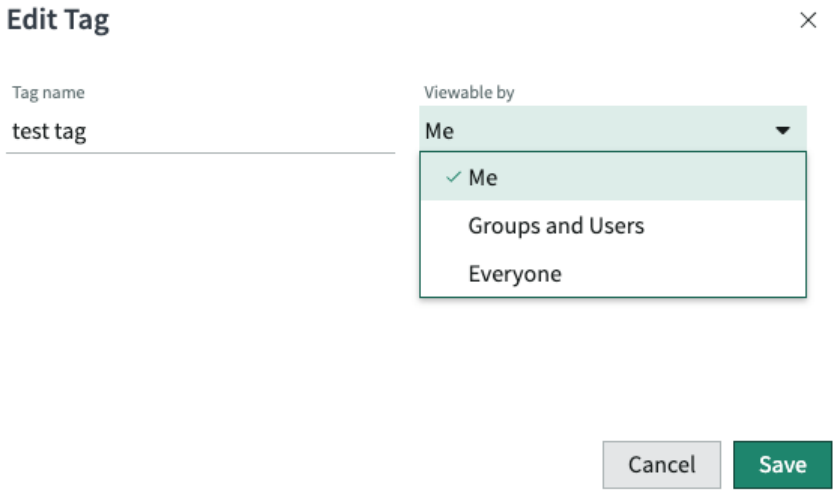
Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. From the List view of Prioritization or Scoring, add a tag for a planning item using one of the following options.

> **Note:**
> The tag visibility setting defaults to private, which means the tag is only visible to the user who created the tag. So, only the user who created the tag can use the tag to search for planning items labeled with that tag.

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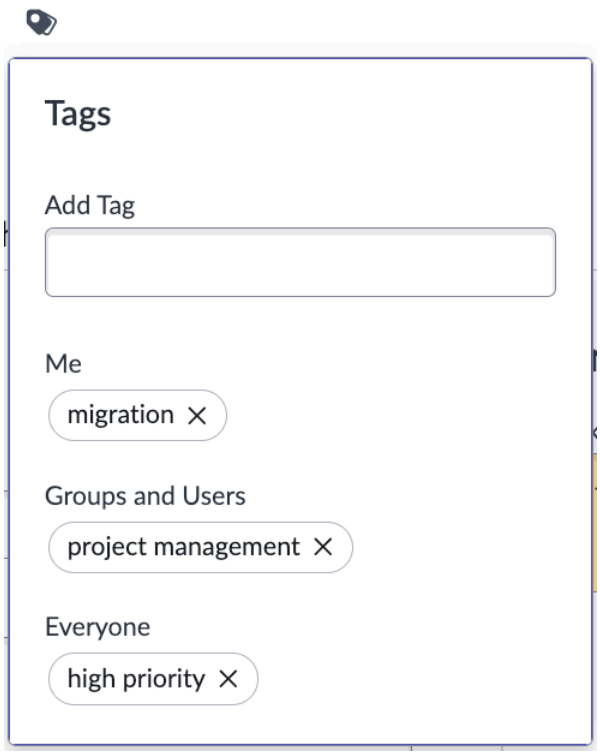
4. To change the visibility setting of the tag, on the Details page of the planning item, select the tag and change the **Viewable by** setting.



Option	Description
Me	Tag is visible only to the person who created the tag. Only the user who created the tag can use the tag to search for planning items la beled with that tag. This setting is the default.
Groups and Users	Tag is visible to specific groups or users. You can specify the groups and users who can view this tag.
Everyone	Tag is visible to everyone. **Note:** This visibility setting is only available to an admin or tags_admin role.

A planning item can have multiple tags and each can have a different visibility setting.

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5. To remove a tag from a planning item, double-click the cell in the Tag column on the List view or select the filled tag icon ( ) on the Details page of the planning item to open the list of tags, then select the **X** next to the tag you want to remove.

Personalizing Prioritization page views in Strategic Planning

Personalize how the List, Kanban, and Hierarchy views on the Prioritization page are displayed so that you can view the planning item information that is most relevant to you and your stakeholders.

Personalize List view of Prioritization page of Strategic Planning Workspace

Personalize the List view in the Prioritization page by grouping, sorting, and hiding columns so that you can view the information that is most relevant for planning.

Before you begin

Create a portfolio plan in Strategic Planning.

Role required: sn_align_core.apw_user

About this task

This task provides guidance on different options to personalize the List view of the Prioritization page.

Personalization preferences are saved as the portfolio plan's settings in Strategic Planning. So, these settings are applied to all the users or user groups that the portfolio plan is shared with.

Procedure

1. Navigate to **All** > **Strategic Planning** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. Use the Personalize side panel to update the display of rows and columns on the page.

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a. Select the Personalize icon ( ).

b. From the Columns section, select the columns that you want to see or hide the data of.

You can reorder the columns here to change their display order on the backlog.

If you want additional columns to be available in this page, your admin can configure them. See Configuring additional columns for Prioritization in Strategic Planning.

c. From the Rows section, choose how the rows are displayed, using the **Shade alternate rows** toggle.

4. Group your items by one or multiple columns that are on display in the Prioritization page.

You can group the planning items by an attribute of the type choice or reference. Some examples to group by are Planning state, Planning item type, Owner, and Primary goal.

Use one of the following ways to group the planning items. Repeat the action to group the list by multiple attributes.
Grouping remains unaffected even when you switch to Kanban or Hierarchy views. The same setting is retained when you come back to the List view. This preference is saved per session for a portfolio plan.

5. Sort the planning items by any column, by clicking the column name.
For example, you can sort the items by **Approved start date**.

6. Pin columns to the left or right of the list.

a. For the column that you want to pin, select the Column actions icon ( ).

b. From the Pin column section, select **Pin to left** or **Pin to right**.
The default selection is **Unpin**.

7. Adjust the width of the columns as per choice or set the width to autofit.
Hold and drag the column border to adjust its width. You can set the column width to autofit using the **Autofit this column** or **Autofit all columns** options from the Column actions ( ).

8. Reset columns to default settings by selecting **Reset columns** from the Personalize menu ( ).

Selecting this option reverts the column personalization, grouping, and sorting to default settings.

Personalization settings that you've made so far on the Prioritization page would be cleared. Any personalization that you make after this point is set as the new preference for the portfolio.

9. Apply filters to the data shown in Prioritization.

Personalize Kanban view of Prioritization page of Strategic Planning Workspace

Personalize the Kanban view in your portfolio plan's Prioritization page as displayed in Strategic Planning, so you can view information that is most relevant to you and your stakeholders.

Before you begin

Create a portfolio plan in Strategic Planning.

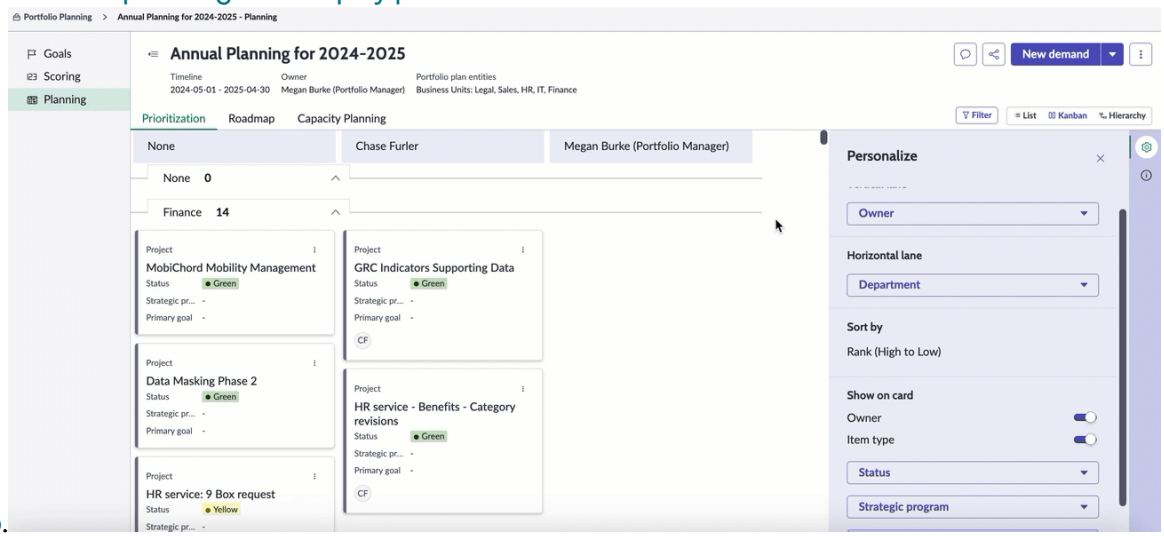
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Role required: sn_align_core.apw_user

About this task
Provides guidance on different options to personalize the Prioritization page for the Kanban view.

Kanban preferences are saved in the portfolio plan level. So, these settings are applied to all the users or user groups that the portfolio plan is shared with.

Procedure
1. Navigate to **All** > **Strategic Planning** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. Select Kanban view.
4. Select the Personalize icon ( ) to update the view, based on your preferences.
   See Customize the planning item display preferences for Prioritization and Roadmap.



Important:
The default display limit of vertical lanes and horizontal lanes shown on a Kanban board is 30 and 30 respectively. These lanes support only reference and choice fields. As you user, you will not be able to change the field metrics on a Kanban card.

Personalize Hierarchy view in the Prioritization page of Strategic Planning Workspace

Personalize the Hierarchy view in the Prioritization page of Strategic Planning Workspace so that you can view the information that is most relevant to you and your stakeholders.

Before you begin
Create a portfolio plan in Strategic Planning.

Role required: sn_align_core.apw_user

About this task
Sort the planning items by an attribute of your choice and use the Personalize side panel to customize the display of the columns.

Personalization preferences are saved as the portfolio plan's settings in Strategic Planning. So, these settings are applied to all the users or user groups that the portfolio plan is shared with.

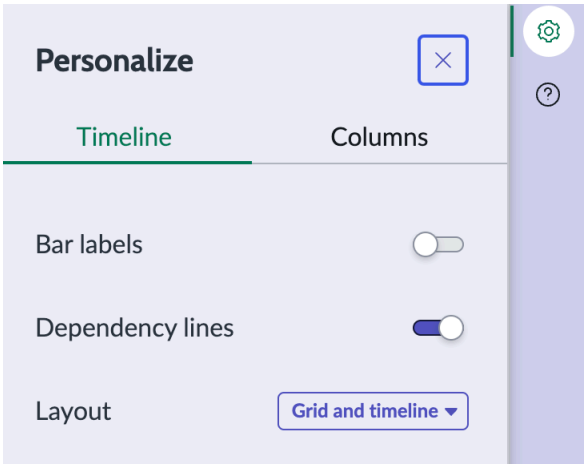
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Procedure

1. Navigate to **All** > **Strategic Planning** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. Personalize the timeline view and the columns on the grid view using the Personalize side panel.

   a. Select the Personalize icon ( ).

   The personalize side panel opens.



   b. From the Timeline section, toggle the display of item names and dependency lines.
   You can also choose to update the layout. Select Grid and timeline view, Grid view, or just the Timeline view.

   c. From the Columns section, update the planning item fields that are displayed in the grid view.
   Select the necessary columns and click **Apply**.

4. Sort the planning items by any column, by clicking the column name.
   For example, you can sort the items by **Approved start date**.
5. Apply filters to the data shown in Prioritization.

Export data of portfolio plan items from Prioritization to Excel or CSV

Export the data of portfolio plan items from your portfolio plan into a Microsoft Excel or CSV file. You can share this data and collaborate with your business stakeholders.

Before you begin

Role required: sn_align_core.apw_user

Procedure

1. Navigate to **All** > **Strategic Planning** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. In the Prioritization tab, select **List** view.
4. Verify that the columns you want to export are personalized.

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Note:
If the filters are applied on the view, the filtered data is exported.

5. Use the personalized side panel to export the data of your portfolio plan items.

   a. Select Export icon ().

   b. From the **File type** drop-down on the Export window, select **Excel** or **CSV** to export the data to a Microsoft Excel or CSV file respectively.
   A file with the selected format is exported. By default, the name of the file is *ABC_Prioritization_List* where ABC is the name of the portfolio plan you exported the data from.

Planning roadmaps in Strategic Planning Workspace

Create a layout of the plans for upcoming projects or initiatives while aligning them with your business objectives using roadmaps in Strategic Planning Workspace. Facilitate collaboration among stakeholders and adjust plans on the go.

Roadmaps in Strategic Planning Workspace are of two types: Portfolio plan roadmaps and free-form roadmaps.

For portfolio plans, only those planning items that are prioritized from the Prioritization page are shown on the roadmap. For more information, see managing backlog items and prioritizing those items for the roadmap.

Use the information in the following sections to start using roadmap capabilities for your business plans.

Note:
Roadmaps are available with Strategic Planning by default. Roadmap Planning (sn_roadmap_plng) is no longer available to install as a separate application.

Related topics

Roadmaps in Strategic Planning

Create a free-form roadmap in Strategic Planning Workspace

Create a standalone visual roadmap to start high-level planning of work from different units of the company.

Before you begin
Role required: sn_align_core.apw_user

About this task
Create a standalone roadmap to plan work across multiple units of your organization, such as projects of all departments. To learn more about free-form roadmaps, see Roadmaps in Strategic Planning.

Select a source table as a starting point to base your roadmap on. Select one of project, epic, program, demand, SAFe epic, and SAFe feature tables for a simple roadmap or Planning Item table for a hybrid roadmap.

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Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning** > **Free-form Roadmaps**
2. Select **New**.
   If this is the first free-form roadmap in your ServiceNow® instance, select **Create your first free-form roadmap**.
3. Use the Create free-form roadmap wizard to fill out the details of your roadmap.

   a. Select a source table to base your roadmap on.

      Your admin can configure other tables to be visible in this list. For more information, see Portfolio plan configuration form.

   b. Add conditions to filter the data from the source table.

      For example, if your source table is **Project**, the related filter condition can be **Business Unit is Finance AND Active is true**.

   c. Enter details of the name and planned dates for the roadmap.

      Note:
      The start and end dates for your roadmap act as a date range filter for all the items displayed in the roadmap.

4. Select **Create**.

Result

- A new roadmap is created and displayed.
- This roadmap is listed in the **Free-form roadmaps** tab of the Home page of Strategic Planning Workspace.

What to do next

- Update, personalize, and collaborate with your roadmap.
- Add milestones or create dependencies for the items planned on your roadmap.

Related topics

Update details of a free-form roadmap in Strategic Planning Workspace

Create planning items from the roadmap view in Strategic Planning Workspace

Plan unscheduled items into a roadmap in Strategic Planning Workspace

Add dependencies for roadmap items in Strategic Planning Workspace

Collaborate on a free-form roadmap in Strategic Planning Workspace

Share a free-form roadmap with stakeholders in Strategic Planning Workspace

Update details of a free-form roadmap in Strategic Planning Workspace

Update the details of a free-form roadmap to reflect the changes in priorities or the timeline of the roadmap.

Before you begin

Create a free-form roadmap in Strategic Planning Workspace.

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Role required: sn_align_core.apw_user

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning** > **Free-form Roadmaps**
2. Select a roadmap to open it.
3. From the roadmap header, select the More actions icon ( ).
4. Use the Update free-form roadmap wizard to edit out the details of your roadmap.
   For field information, see Create a free-form roadmap in Strategic Planning Workspace.
5. Select **Update**.

Result
The roadmap is updated and the roadmap items are displayed according to the latest changes.

Related topics

Create planning items from the roadmap view in Strategic Planning Workspace

Plan unscheduled items into a roadmap in Strategic Planning Workspace

Add dependencies for roadmap items in Strategic Planning Workspace

Collaborate on a free-form roadmap in Strategic Planning Workspace

Share a free-form roadmap with stakeholders in Strategic Planning Workspace

Share a free-form roadmap with stakeholders in Strategic Planning Workspace

Add people from your organization who are the stakeholders for the work involved in your roadmap plan so that they have visibility into the roadmap's progress.

Before you begin

- Create a free-form roadmap in Strategic Planning Workspace.
- Ensure that the users that you add as stakeholders have the appropriate role to access the roadmap. For more details on user roles, see Components installed with Strategic Planning Workspace.

Role required: sn_align_core.apw_user

About this task
Grant access for the free-form roadmap to other users and stakeholders in your organization.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning** > **Free-form Roadmaps**
2. Select a roadmap to open it.
3. From the roadmap header, select the **Share roadmap** icon ( ).
4. On the Share roadmap form, select users to share the roadmap with and set their access appropriately.

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a. In the **Members or Groups** field, enter the names of individual users or groups.

b. From the **Access** field, select the access level as **Viewer** or **Editor** for the users selected.

For a business stakeholder user, even if you grant the Editor access, they can only add comments on the roadmap.

5. Select **Send invite**.

What to do next
Change the access level or remove access for a user or a group.

1. On the Share roadmap form, select **Manage access**.
2. From the user or group card, select the action menu icon ( ).
3. Select the right access level or select **Remove**.

Collaborate on a free-form roadmap in Strategic Planning Workspace

Add comments and attachments to a free-form roadmap for other users of your organization can review and share their feedback. Collaborate and ensure that your roadmap aligns with your company's priorities.

Before you begin
Role required: sn_align_core.apw_user or sn_roadmap_plng.roadmap_editor

About this task
Using the Comments side panel, add attachments or notes at the roadmap-level or the planning item-level.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning** > **Free-form Roadmaps**
2. Select a roadmap to collaborate on.
3. Select the appropriate tab at the roadmap-level or planning item-level.

4. Add attachments or worknotes.

Managing free-form roadmap views in Strategic Planning

Portfolio managers can create customized views for their free-form roadmap by applying personalization settings such as grouping, milestones selection, dependencies selection, and tracking mode. Portfolio owners or editors can share these personalized views with stakeholders to enable easier collaboration on the free-form roadmaps.

Benefits of free-form roadmap views

Portfolio managers can create personalized views as needed by applying settings such as grouping, milestones selection, dependencies selection, and tracking mode.

- Views can be created as private or public.
- Can create up to three private views and up to 10 shared (public) views.

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- Free-form roadmap views can be shared with stakeholders to enable collaboration on the free-form roadmap.
- Switch between shared and private views as needed.

Create a free-form roadmap view in Strategic Planning

Create a customized free-form roadmap view based on your requirements, so you can access it when you log in again and share it with stakeholders for collaboration.

Before you begin

Role required: sn_align_core.ap_read_only

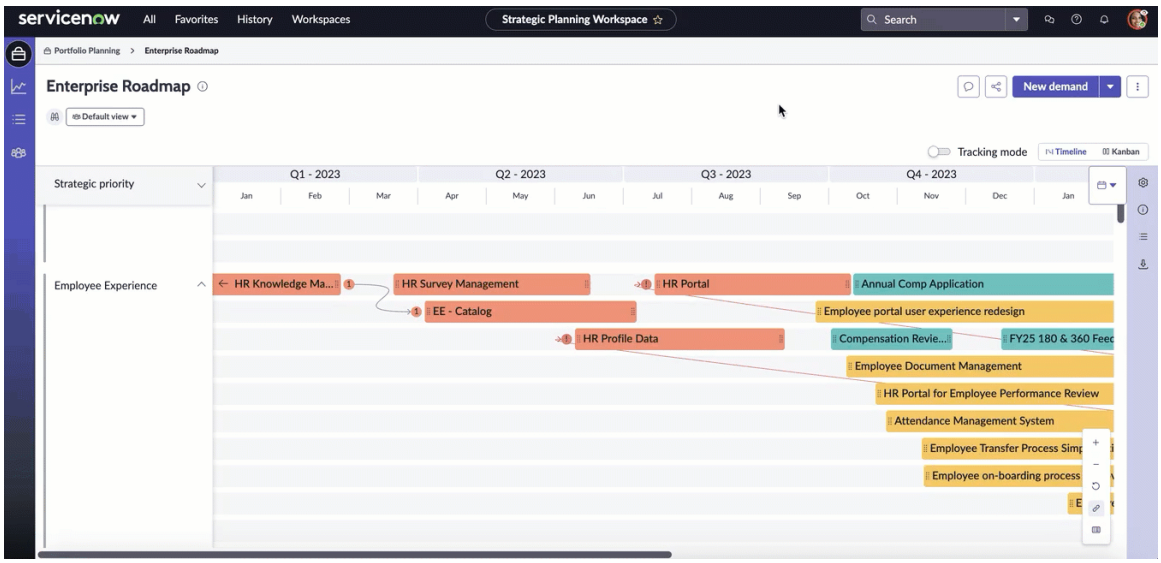
About this task

You can create up to three private views and up to 10 shared (public) views per free-form roadmap.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning** > **Free-form Roadmaps**
2. Select a free-form roadmap to open it.
3. Make any changes to the view as needed.
   For example, enable **Tracking mode** toggle.

   The **Save as new view** option appears on the free-form roadmap header.



4. From the free-form roadmap header, select **Save as new view**.
5. On the Save as new view window, fill the details.

   a. Enter a name for the view in the **View name** field.

   b. **Optional:** Select the **Shared view** toggle to make this view public.
   Selecting the **Shared view** toggle makes the view visible to all stakeholders with whom this free-form roadmap is shared.

   c. Select **Save**.

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Result
The shared view for the free-form roadmap is created and will be visible to all stakeholders with whom this free-form roadmap is shared.

What to do next
- Share the free-form roadmap with your stakeholders to start collaborating on the free-form roadmap. See Share a free-form roadmap with stakeholders in Strategic Planning Workspace.
- Edit a free-form roadmap view to make any changes to the existing view. See Edit a free-form roadmap view in Strategic Planning.

Edit a free-form roadmap view in Strategic Planning

Edit a customized free-form roadmap view based on your requirements, so you can access it when you log in again and share it with stakeholders for collaboration.

Before you begin
Role required: sn_align_core.ap_read_only

About this task
- Only the owner of a free-form roadmap view can edit a shared (public) view.
- You can have up to three private views and up to ten shared (public) views per free-form roadmap.

Procedure
1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning** > **Free-form Roadmaps**
2. Select a free-form roadmap to open it.
3. From the free-form roadmap header, select the view you want to edit or override with your personalization settings from the list of available free-form roadmap views.
   The selected view appears.
4. Make changes to the view as needed.
   For example, enable **Tracking mode** toggle.

   After you make any change to the view, the Save view option appears in the free-form roadmap header.
5. Select **Save view**.
   The view is updated to reflect the changes made.
6. **Optional:** To edit name of the view, select the Free-form roadmap drop-down from the free-form roadmap header and then select Edit view icon ( ) next to the view you want to edit the name for.
   On the Edit view window, fill the details.

   a. Update the name for the view in the **View name** field as required.

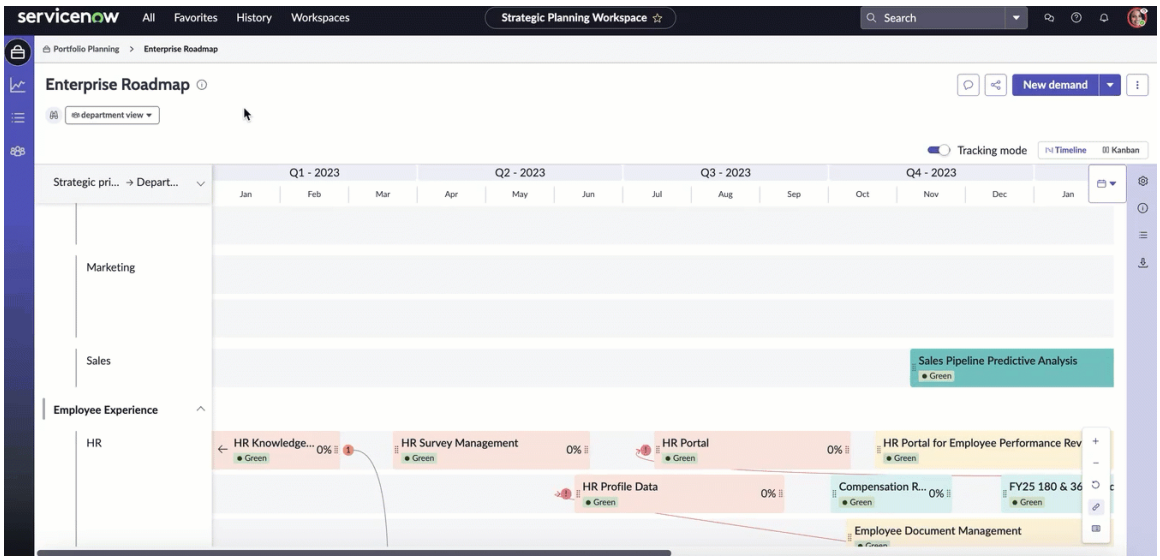
   Note:
   Only the owner of the free-form roadmap view can rename the view.

   b. **Optional:** Select the **Shared view** toggle to make this view public or disable the **Shared view** toggle to make the view private.

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Important:
Changing a shared view to a private view removes access for existing stakeholders.

c. Select **Save**.



What to do next

Share the free-form roadmap with your stakeholders to start collaborating on the free-form roadmap. See Share a free-form roadmap with stakeholders in Strategic Planning Workspace.

Related topics

Create a free-form roadmap view in Strategic Planning

Delete a free-form roadmap view in Strategic Planning

Delete a free-form roadmap view in Strategic Planning

Delete a customized free-form roadmap view if it is no longer needed or if the maximum limit of ten shared or three private views has been reached.

Before you begin

Role required: sn_align_core.ap_read_only

About this task

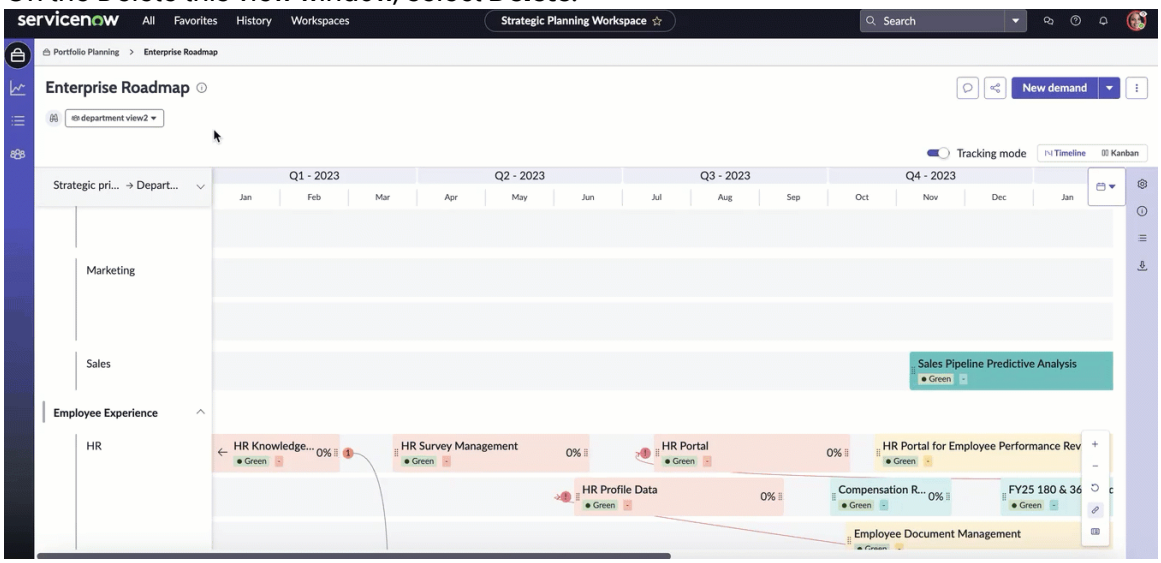
- Only the owner of the free-form roadmap view or an editor of the free-form roadmap can delete the view.
- Deleting a free-form roadmap deletes the view, including any changes made to the view. However, this action keeps the items (projects, demands, epics) intact in the free-form roadmap.
- You can have up to three private views and up to ten shared (public) views per free-form roadmap.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning** > **Free-form Roadmaps**
2. Select a free-form roadmap to open it.

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3. Select the Free-form roadmap view drop-down from the free-form roadmap header and then select Delete view icon ( ) next to the view you want to delete.
   The Delete this view window appears.
4. On the Delete this view window, select **Delete**.



Related topics

Create a free-form roadmap view in Strategic Planning

Edit a free-form roadmap view in Strategic Planning

Create a copy of an existing free-form roadmap in Strategic Planning Workspace

Create a roadmap with the data of an existing roadmap. If the roadmap you want to create is similar to an existing roadmap, copying the existing roadmap saves your time.

Before you begin

Role required: sn_align_core.apw_user

About this task

Create a standalone roadmap to plan work across multiple units of your organization, such as projects of all departments. To learn more about free-form roadmaps, see Roadmaps in Strategic Planning.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning** > **Free-form Roadmaps**
2. Select a roadmap that you want to create a copy from.
3. From the roadmap header, select the More actions icon ( ) and then select **Duplicate roadmap**.
4. On the Duplicate roadmap window, fill the details.
   a. Enter a name for the roadmap in the **Roadmap name** field.
      By default, the name is *ABC (Copy)* where ABC is the name of the roadmap you copied from.

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b. **Optional:** Select **Share with same users and groups** option to grant access to the users of the roadmap you copied from.
The action grants same read and edit access as is the users had for the roadmap you copied from.

c. Select **Confirm**.

Result

- A new roadmap is created and a link is generated on the screen to access the new roadmap.
- This roadmap is listed in the **Free-form roadmaps** tab of the Home page of Strategic Planning Workspace.

What to do next

- Update, personalize, and collaborate with your roadmap.
- Add milestones or create dependencies for the items planned on your roadmap.

Create planning items from the roadmap view in Strategic Planning Workspace

Create and add new planning items to your portfolio roadmap or free-form roadmap directly from the roadmap view.

Before you begin

Role required: sn_align_core.apw_user

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning** and open your roadmap.

2. From the roadmap view, select the **New <item type>** option.

   - For a free-form roadmap, the option depends on the roadmap's source table.
   - For a portfolio plan roadmap, the option depends on the portfolio plan configuration.

One planning item type	Multiple planning item types
	

   For a free-form roadmap, if the source table is Planning Item [sn_align_core_planning_item] table, then the options depend on the values configured for the *`freeform_planning_items_creation_list`* property. By default, project and demand are available. Work with your admin to configure these options. See Enable custom item types in Strategic Planning.

3. On the form, fill in the required field information.
   For full field information, see Planning item form.

4. Select **Submit**.

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Result
The new item appears on the roadmap, at a place based on its approved start and end dates.

If you don't fill both the approved start and end date fields, the item that you created would be moved to the list of unscheduled items. You can add them to your roadmap plan later. For more information, see Plan unscheduled items into a roadmap in Strategic Planning Workspace.

Modify planning items from the roadmap view in Strategic Planning Workspace

Update the details of planning items or delete them from a portfolio plan or free-form roadmap so that your roadmap reflects the latest plans.

Before you begin
Role required: sn_align_core.apw_user

About this task
Edit the details of planning items from a side panel view, or the full details view in the roadmap.

Procedure
1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning** and open your roadmap.

2. From the roadmap view, click a planning item that you want to update or delete.

   The side panel opens with the Details tab.

   Further, you can click **Full details** and open the item's record page. On the full details page, you can also view related lists such as Milestones, Dependencies, and others. For field information, see Planning item form.

   Note:
   If your free-form roadmap was built on one of the PPM tables, such as project [pm_project] or demand [dmn_demand], you can only make updates from the full details page.

3. Update the details or delete the item.
   - To update, edit the field details and click **Update**.

     If you're on the full details page, click **Save**.
   - To delete, do the following:

     a. On the full details page, click the More Actions icon ( ) and select **Delete**.

     b. Click **OK** to confirm.

Related topics
Add milestones for roadmap items in Strategic Planning Workspace

Add dependencies for roadmap items in Strategic Planning Workspace

Plan unscheduled items into a roadmap in Strategic Planning Workspace

Add items without start or end dates yet to your portfolio plan or free-form roadmap.

Before you begin
Role required: sn_align_core.apw_user

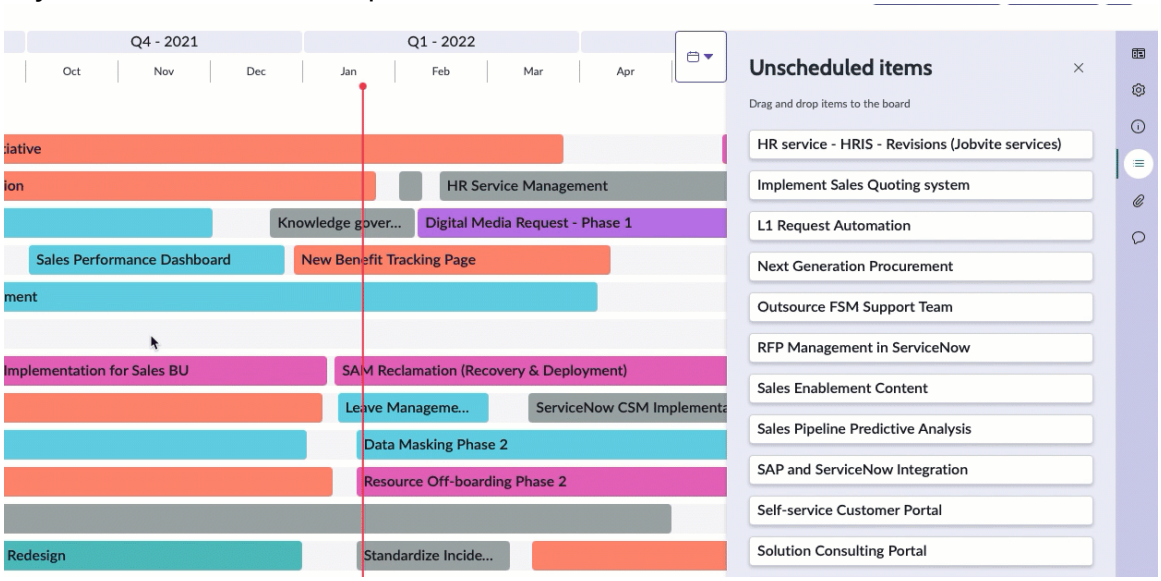
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About this task

Planning items that meet the criteria of your portfolio plan or free-form roadmap, but don't have either the start or end dates are categorized as unscheduled items. As you progress in your planning, use the unscheduled items list to schedule these items into your roadmap timeline.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning** and open your roadmap.
2. From the sidebar, select Unscheduled items ( ).
3. From the list of unscheduled items in the side panel, drag and drop a planning item at a place of your choice on the roadmap.



Related topics

Reschedule roadmap items in Strategic Planning Workspace

Reschedule roadmap items in Strategic Planning Workspace

Update the planned dates of your roadmap items to account for any changes in your scheduling priorities.

Before you begin

Role required: sn_align_core.apw_user

Procedure

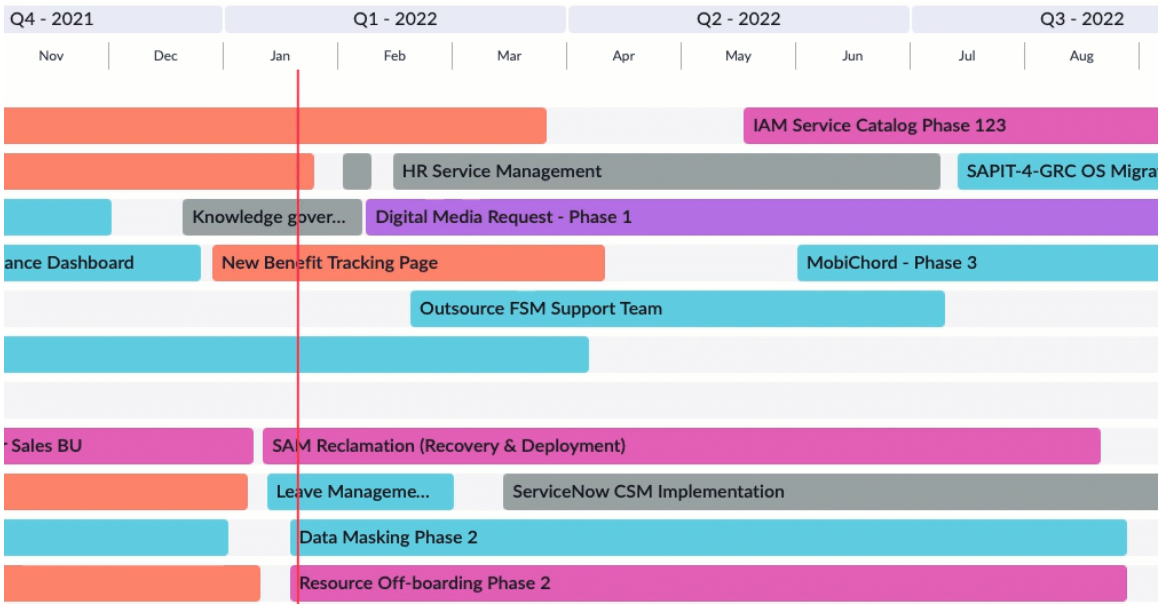
1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning** and open your roadmap.
2. To change the dates planned for a roadmap item, resize the roadmap item bar.

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Note:

- When the start date of a demand is changed along the roadmap, the start date of the demand record in the Demand [dmn_demand] table and the timeline of the associated cost plan are automatically updated to match the new date.
- When the dates of a project are changed along the roadmap, the changes are updated in the project record in the Project [pm_project] table.

3. To reschedule the roadmap item, drag and drop the item to a timeline area of your choice.



Related topics

Add milestones for a roadmap in Strategic Planning Workspace

Add milestones for roadmap items in Strategic Planning Workspace

Add milestones for a roadmap in Strategic Planning Workspace

Track key dates of your plan's timeline by creating milestones and displaying them on the roadmap.

Before you begin

Role required: sn_align_core.apw_user

About this task

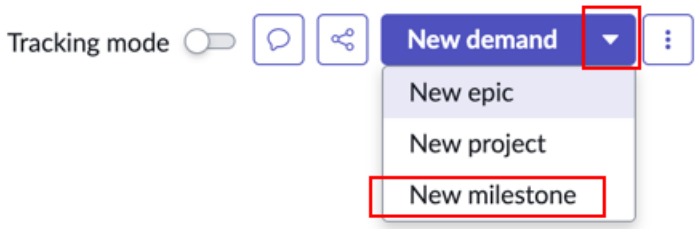
For the timeline of your portfolio plan or free-form roadmap, create milestones such as launch dates, deadlines, or other key events directly from the roadmap view.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning** and open your roadmap.

2. From the More actions drop-down, select **New milestone**.

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3. On the form, fill in the fields.

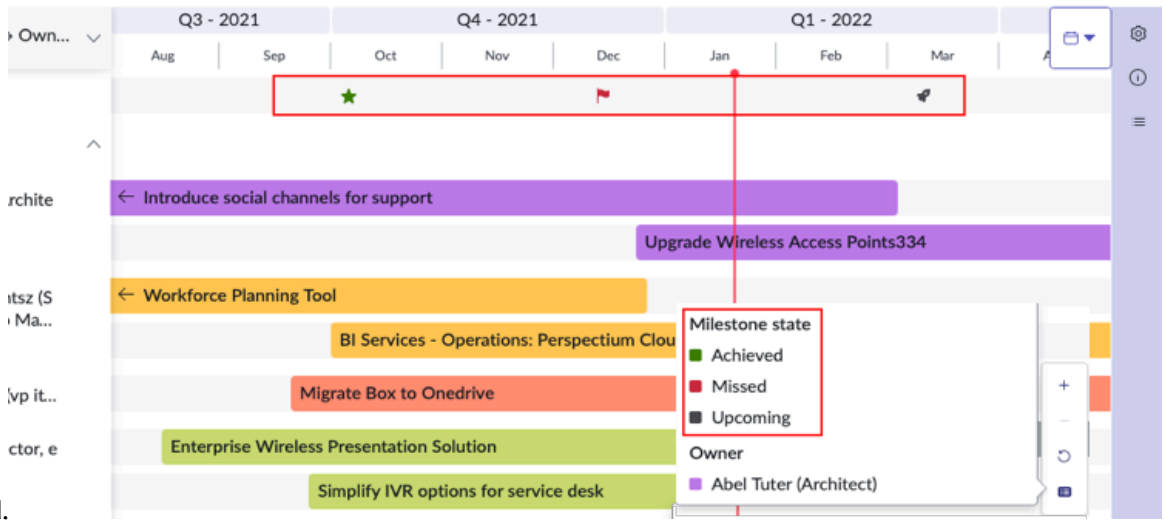
   For field information, see Roadmap milestone form.

4. Select **Submit**.

5. **Optional:** Repeat steps 2 through 4 to add more milestones to your roadmap.

Result
Milestones that you created are visible on the roadmap.

Here is an image of a sample roadmap with the milestone bar showing different milestones for the planning period.

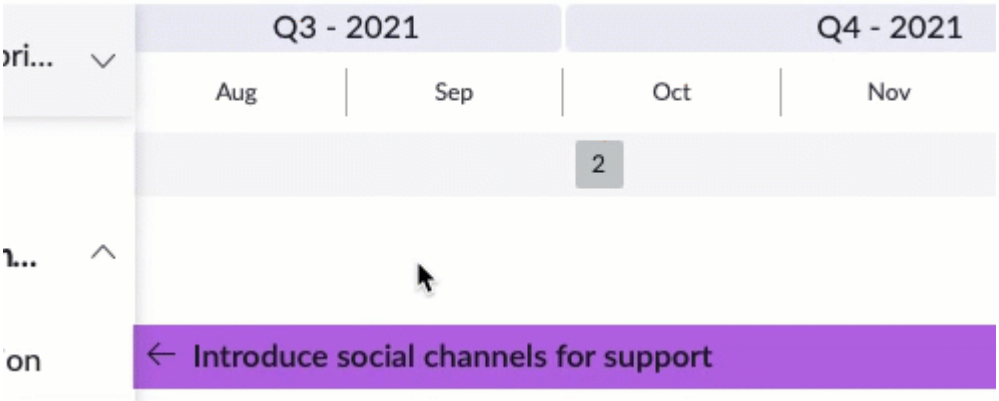


The color of the milestone, shown on the legend, indicates the status of the milestone.

- Red: Missed milestone.
- Green: Achieved milestone.
- Grey: Upcoming milestone.

If multiple milestones are scheduled close to each other, they might appear grouped in the milestone bar. In this case, you can expand and collapse the milestone bar to view all the milestones of that period.

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Related topics

Customizing milestones display on roadmap in Strategic Planning Workspace

Update a roadmap milestone in Strategic Planning Workspace

Update or delete the milestones that you added to your portfolio plan or free-form roadmap so that they reflect any change of plans.

Before you begin

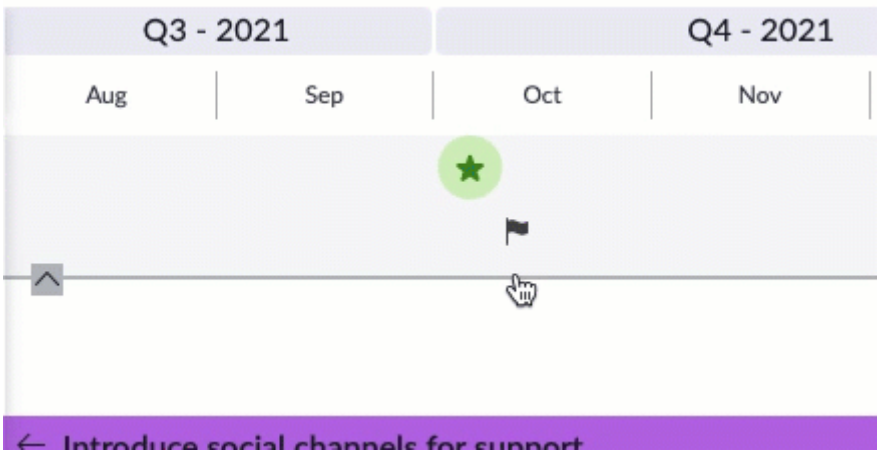
Add milestones for a roadmap in Strategic Planning Workspace.

Role required: sn_align_core.apw_user

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning** and open your roadmap.

2. To reschedule a milestone, you can drag and drop it at a timeline area of your choice.



   If you want to update other details or delete the milestone, proceed with the following steps.

3. From the roadmap view, click the milestone that you want to update.
   The side panel opens showing the milestone details.
4. Update or delete the milestone.
   - To update, edit the field details and click **Save**.

     For information on the form fields, see Roadmap configuration form.

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- To delete the milestone, click **Delete.**

  Select **OK** to confirm.

Related topics

Customizing milestones display on roadmap in Strategic Planning Workspace

Add milestones for roadmap items in Strategic Planning Workspace

Track key outcomes of your planning items (such as demands, scrum epics, or programs) by creating milestones for them, directly from the roadmap view.

Before you begin
Role required: sn_align_core.apw_user

About this task
Select a roadmap item and create a milestone for it. Use the roadmap side panel to fill in the details and submit.

For free-form roadmaps, milestones are supported only if the source table is Planning Item [sn_align_core_planning_item] or one of its extensions.

Important:

You can't add a project milestone from the roadmap view. Creating or updating project milestones may impact the associated project plans. So, it's recommended to create or update project milestones using Project Workspace in Project Portfolio Management (PPM).

However, any existing milestones of the project are visible on the roadmap if you've integrated Strategic Planning with PPM.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning** and open your roadmap.
2. From the roadmap view, click a planning item to which you want to add the milestone.
   The side panel opens showing the item details.
3. Select the Milestones tab.
   Alternatively, you can click **Full details** and select the Milestones tab from the full details page.
4. Select the Add milestone icon ( ).
   If the item doesn't have any milestones, select **New milestone**.
5. On the form, fill in the fields.

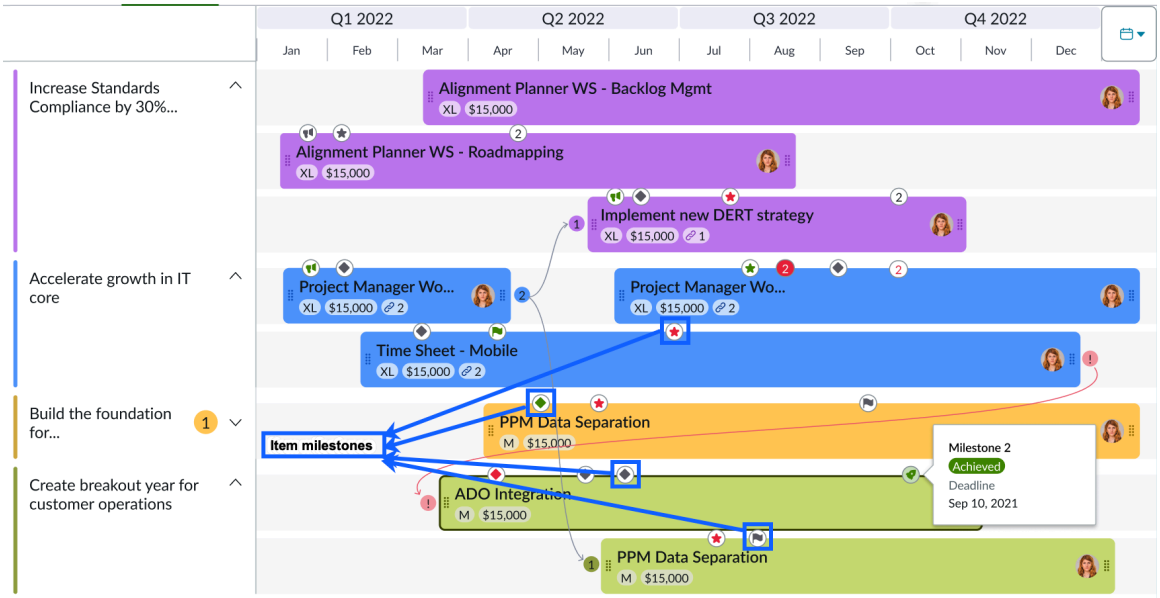
   For field information, see Planning item milestone form.
6. Select **Save**.
   When you go back to the Milestones tab, you can see the milestone listed there.
7. **Optional:** Repeat steps 2 through 6 to add more milestones to your items.

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Result

- Milestones that you created are indicated on the roadmap item bars.

  Here's an image of a sample roadmap with the roadmap items indicating that they have milestones.



- Pointing your cursor over these milestone indicators shows the details such as the milestone name, type, and due date.
- Clicking one of these indicators opens the Milestones tab of the Item details side panel. Here, you can see a list of all the milestones for this planning item.

What to do next

- Learn how to customize the display of milestones on the roadmap.
- Learn when a planning item milestone can be in an error state.
- Learn how to manage the milestones for planning items.

Update roadmap item milestones in Strategic Planning Workspace

Update or delete the milestones that you added to your planning items (such as demands, scrum epics, or programs) so that they reflect any change of plans.

Before you begin

Role required: sn_align_core.apw_user

About this task

From the portfolio roadmap or free-form roadmap, select a planning milestone to update its details. Use the roadmap side panel to edit the details and submit.

For free-form roadmaps, milestones are supported only if the source table is Planning Item [sn_align_core_planning_item] or one of its extensions.

Important:

You can't add a project milestone from the roadmap view. Creating or updating project milestones may impact the associated project plans. So, it's recommended to create or update project milestones using Project Workspace in Project Portfolio Management (PPM).

However, any existing milestones of the project are visible on the roadmap if you've integrated Strategic Planning with PPM.

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Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning** and open your roadmap.

2. From the roadmap view, click a planning item and select the Milestones tab.

   The side panel shows the list of all the milestones associated with this planning item.

   Alternatively, you can click **Full details** and open the item's record page and then select the Milestones tab.

3. Click the milestone that you want to update.
4. From the milestone form, update the details or delete the milestone.
   - To update, edit the field details and click **Save**.

     For information on the form fields, see Planning item milestone form.

   - To delete the milestone, click **Delete.**

     Select **OK** to confirm.

Related topics

Customizing milestones display on roadmap in Strategic Planning Workspace

Add dependencies for roadmap items in Strategic Planning Workspace

Create dependencies and visualize relationships between planning items of your portfolio or free-form roadmap, so that you can adjust their scheduling.

Before you begin

Role required: sn_align_core.apw_user

About this task

From the portfolio roadmap or the free-form roadmap, use the item details side panel to create dependencies between two planning items. Dependencies are supported for projects, epics, demands, initiatives, programs, or any custom planning item types that you may have created.

The dependency for a planning item on your roadmap can be on an item from the same roadmap, a different roadmap, or the item might not be planned yet. Learn more about dependencies in the roadmap.

Note:
Dependencies for free-form roadmaps are available only if the roadmap's source table is Planning Item [sn_align_core_planning_item] or one of its extensions.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning** and open your roadmap.

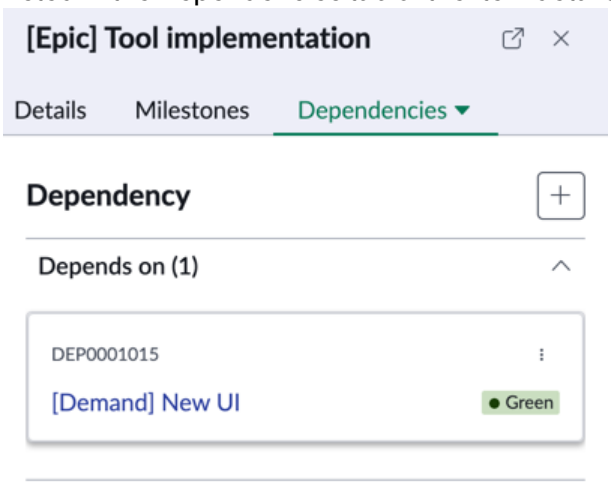
2. From the roadmap view, click a planning item for which you want to add the dependency. The side panel opens showing the item details.
3. Select **More** > **Dependencies**.

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4. From the Dependencies tab, select the Add dependency icon ( ).
5. On the form, fill in the fields.

   For form field information, see Dependency form.
6. Select **Save**.

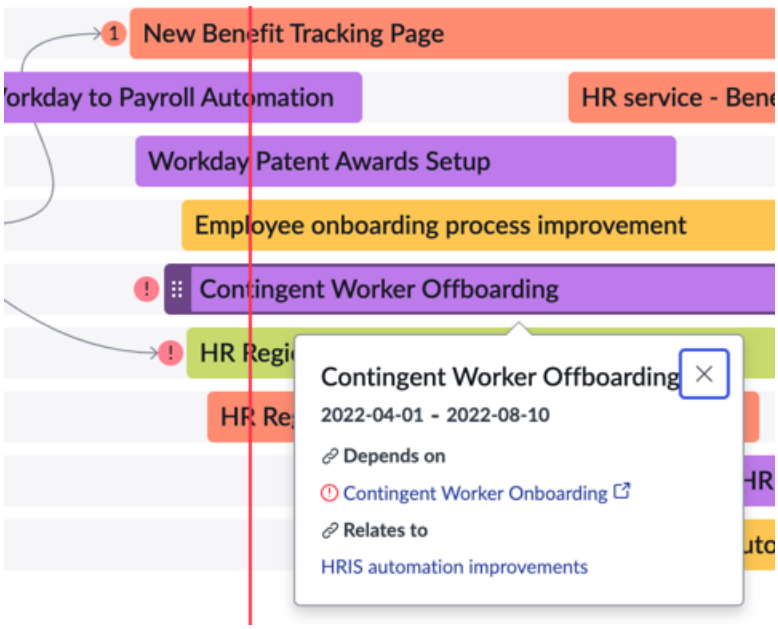
Result
The dependency is created between the selected planning items and is listed in the Dependencies tab of the Item details side



panel.

On the roadmap, you can see the dependency details from the roadmap item card or the dependency lines. Learn about display settings available for dependencies on the roadmap.

If one of the dependency items is not on the roadmap, then the dependency details are shown on the roadmap item card, with a redirect link to the external planning item. In this case, the items could belong to the same roadmap or not.



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What to do next

- Learn how to resolve roadmap item dependency errors.
- Update the dependency details or delete it. See Update roadmap item dependencies in Strategic Planning Workspace.

Update roadmap item dependencies in Strategic Planning Workspace

Update or delete the dependencies for the planning items on your roadmap so that they reflect any change of plans.

Before you begin
Role required: sn_align_core.apw_user

About this task
Use the roadmap side panel to change the details of a dependency or delete it.

Dependencies for free-form roadmaps are available only if the roadmap's source table is Planning Item [sn_align_core_planning_item] or one of its extensions.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning** and open your roadmap.

2. From the roadmap view, click a planning item whose dependencies you want to update or delete.

   The side panel opens showing the item details.

3. Select **More** > **Dependencies**.
   Dependencies for this planning item are listed in the form of cards.

4. From the side panel, locate your dependency and use the More actions icon ( ) to edit or delete.

Personalize your roadmap Timeline view in Strategic Planning Workspace

Customize the way that your roadmap is displayed in the Timeline view. Group the roadmap items, color them by a category, add numerical data points, and display milestones and dependencies to analyze your roadmap efficiently and take informed decisions.

Before you begin
Role required: sn_align_core.apw_user

About this task
This task provides guidance on different options to personalize the Timeline view of your roadmap. Choose the options that you want to apply.

Any settings that you apply here are saved as preferences per roadmap. All users who can access the roadmap would see the same settings.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning** and open your roadmap.

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2. Modify the scale of the timeline of your roadmap.
   Select the time scale icon ( ) and choose **Month**, **Quarter**, or **Year**.

   Note:
   The timescale view that you choose is saved in the roadmap preferences.

3. Use the side panel to personalize how your roadmap looks like.

   a. From the side bar, select the Personalize icon ( ).

   b. Group and color your roadmap items by the available attributes.

      You can group the roadmap items by up to two attributes and color-code them by one attribute.

      You can work with your admin to add other attributes for the Group by, Color by, and Metrics fields. See Customize the planning item display preferences for Prioritization and Roadmap.

      Important:
      Don't group your roadmap items by the name attribute because the application renames the roadmap item when you move the item bar from one group to another.

   c. Enable visibility of owners of the roadmap items by using the **Owner** toggle.

   d. Display data points such as planned cost on the roadmap item bars by adding fields in the **Metrics** section.

      You can add up to three metrics.

   e. If your roadmap items (such as projects, epics, or demands) have milestones, adjust how they're displayed using the toggles in the Milestones section.
      For more information, see Customizing milestones display on roadmap in Strategic Planning Workspace.

   f. If your roadmap items have dependencies, adjust how they're displayed using the toggles in the Dependencies section.
      For more information, see Customizing the dependencies display on the roadmap in Strategic Planning Workspace.

   g. Identify the current date on your timeline using the current date indicator.
      Enable the **Current date line** toggle from the Other settings section.

4. Quickly enable or disable the display of dependency lines between the roadmap items using the Display dependency lines icon ( ).
5. Zoom in, zoom out, and reset the zoom of your roadmap view by using the zoom options.

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Note:
The zoom level that you choose isn't saved as the roadmap preferences.

6. Apply filters to the data shown on the roadmap.

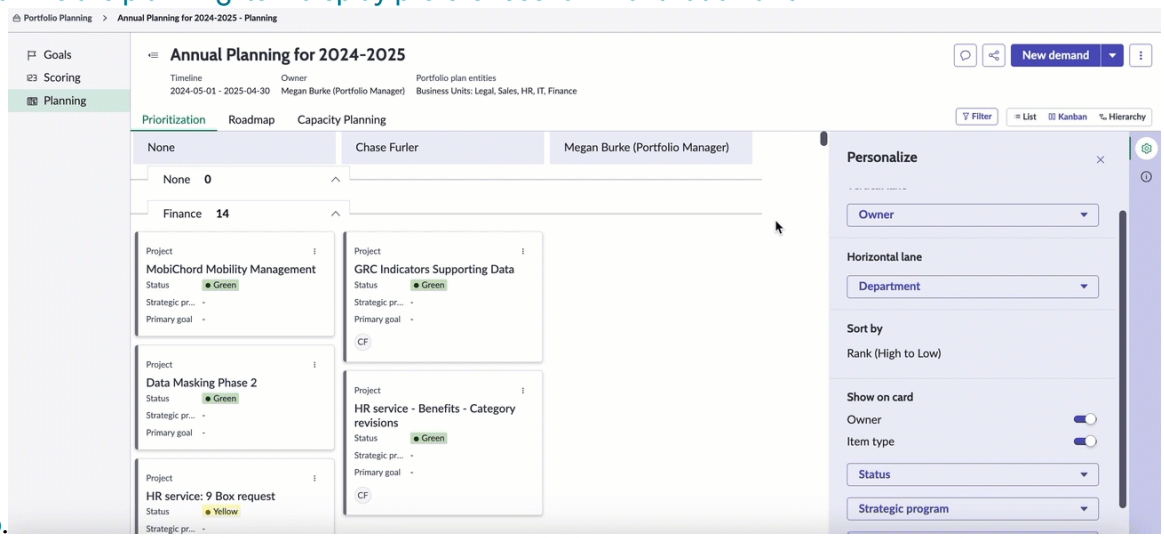
Personalize your roadmap Kanban view in Strategic Planning Workspace

Customize the way that your roadmap Kanban is displayed. Modify the lane values to change the way your cards are sorted, or customize the card metrics to view only the fields you want to see on the cards.

Before you begin
Role required: sn_align_core.apw_user

Procedure

1. Navigate to **All** > **Strategic Planning** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. Select Kanban view.
4. Select the Personalize icon ( ) to update the view, based on your preferences.
   See Customize the planning item display preferences for Prioritization and Roadmap.



Important:
The default display limit of vertical lanes and horizontal lanes shown on a Kanban board is 30 and 30 respectively. These lanes support only reference and choice fields. As you user, you will not be able to change the field metrics on a Kanban card.

Track the progress of your roadmap items in Strategic Planning Workspace

Visually track the completion of a work item on your portfolio plan roadmap or free-form roadmap using the tracking mode.

Before you begin
Role required: sn_align_core.apw_user

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About this task

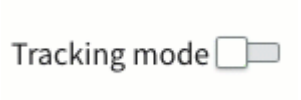
Use a toggle to switch your roadmap view from planning mode to tracking mode. The roadmap item cards turn into progress bars to indicate the status and progress.

Note:
While in Tracking mode, you cannot create, update, or reschedule roadmap items and milestones. This view is a read-only mode.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning** and open your roadmap.

2. Select the Tracking mode option to turn on the tracking view of the roadmap.



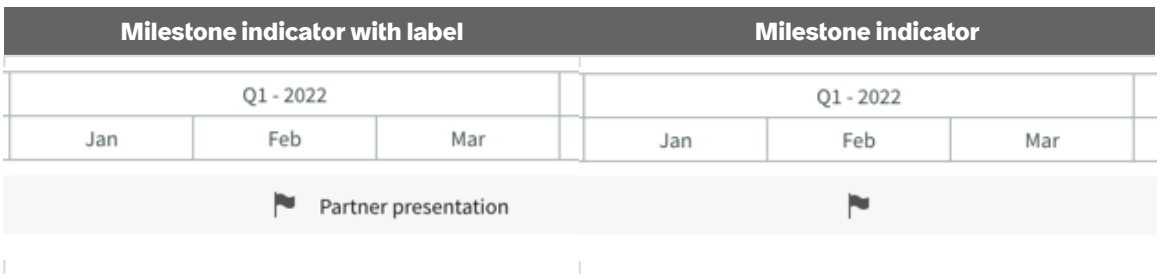
3. **Optional:** Personalize the roadmap view in tracking mode.

Note:
The group by and color by personalization that you've done in the planning mode of your roadmap gets carried over to the tracking mode but the metrics are not carried over.

   a. Enable or disable the visibility of the roadmap item status and percentage complete using the **Status** and **% Complete** toggles respectively.

   b. Display data points such as planned cost on the roadmap item bars by adding fields in the **Metrics** section.
   You can add up to two metrics in tracking mode.

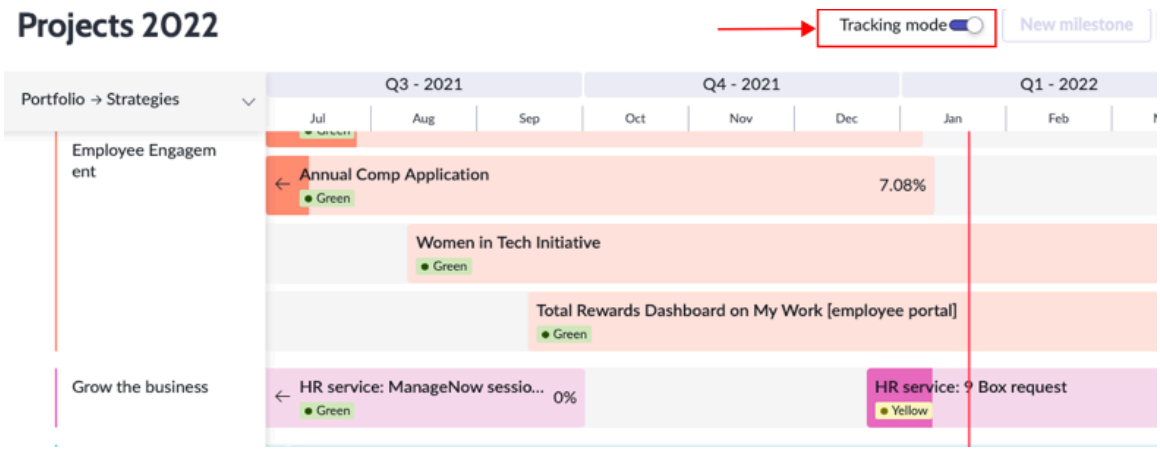
   c. Personalize the display of milestones.
   You can choose to display the milestone with just its icon or along with its label.



Result

The tracking view of your roadmap is displayed according to your personalization settings. A sample view of roadmap tracking is shown in the following image.

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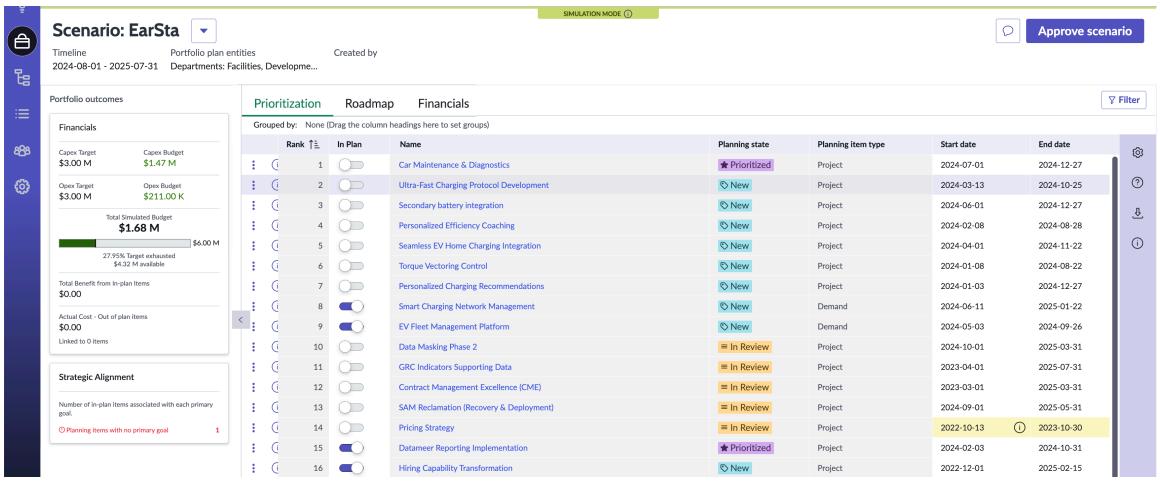


Optimizing planning with scenario planning in Strategic Planning Workspace

As a portfolio manager, optimize your portfolio planning by comparing potential outcomes, assessing their alignment with strategic goals, and approving the best scenario as your live plan.

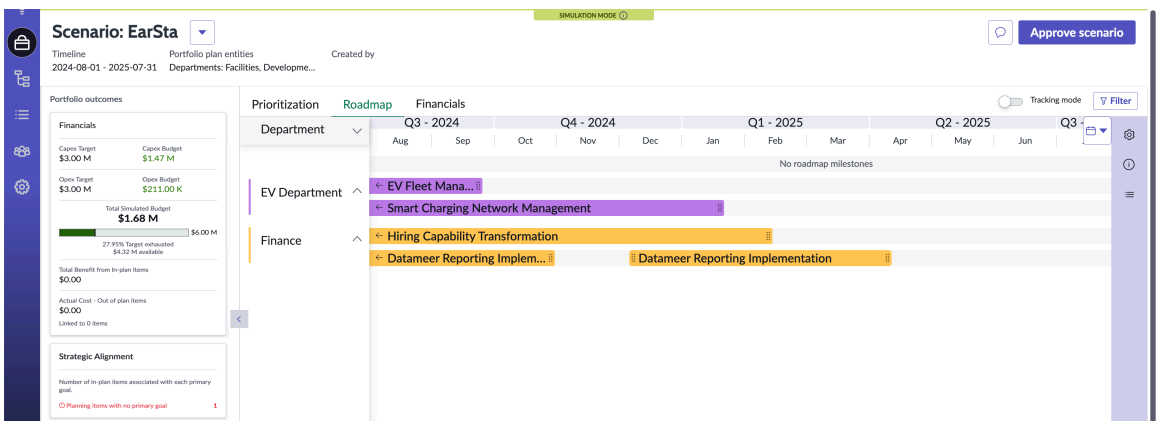
Scenario planning items in the Prioritization tab

The **Prioritization** tab of the Scenario page enables you to add and remove planning items to/from a scenario and adjust their dates.



Scenario planning items in the Roadmap tab

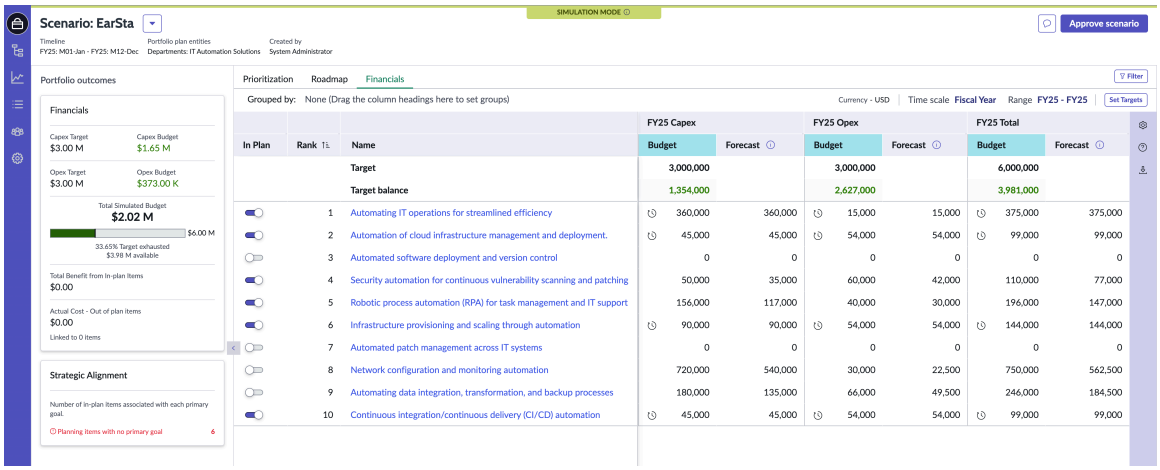
The **Roadmap** tab displays a Gantt chart-like view of the planning items in the scenario, showing their planned start and end dates across the portfolio plan timeline. Using the Roadmap tab, you can drag the bars representing planning items across the timeline to adjust their dates.



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Scenario planning items in Financials tab

The **Financials** tab of the Scenario page enables you to set custom targets, budget, and compare the allocated budget against target using the outcomes panel.



Portfolio Manager can simulate multiple scenarios with different budget combinations and compare their outcomes to arrive at an informed decision to balance the resources and strategic objectives. Using the financials view in Scenario planning, you can get a simulation mode for the financial information. Using this view, Portfolio managers working on the portfolios, can set a portfolio budget target for a particular planning cycle, which could be a monthly, quarterly, yearly, or beyond a year up to 5 years. Using this defined budget, portfolio users can prioritize the planning items within the portfolio to analyze if the prioritized items can be executed within their portfolio budget, while reviewing the monetary benefit from the prioritized items.

Important:
Enable the budget allocation property to allocate budget to your planning items at portfolio-level and configure the budget attributes to allocate budget by expense type or cost type.

Create multiple scenarios to compare them, and work with your stakeholders to approve an ideal plan with better monetary benefit returns. Once approved, the approved Scenario will become your new portfolio plan for the defined planning cycle. For more information to know about the changes happening in a portfolio after scenario approval, see Approve a scenario in Strategic Planning.

You can perform financial scenario planning throughout your planning or execution cycle depending on your organization needs such as at your regular planning cycles, quarterly reviews, or financial review cycles. Financials in scenario planning helps you to arrive at an informed decision and customize the portfolio planning to match with your organization needs.

Note:

- Financials in scenario planning is supported only for Epics, Projects, and Demands type of planning items.
- Customers using the Legacy Investment Funding should migrate to new experience to work on the financial scenario planning.

Personalize your scenario planning financials view using the Time scale and Range filters. Manage the budget of your planning items by monthly, quarterly, or yearly cadence depending on the planning cycle of your organization.

Outcomes panel in Scenario planning

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The outcomes panel in the simulation indicates the financial information of the portfolio such as target and budget amounts for Capex and Opex, set budget target for this simulation, utilized and remaining budget from the target, benefit from the In-plan items, and the actual costs accounting from the out of plan items. The aggregated data is fetched based on the portfolio timeline range including the target and budget data.

Representations in outcomes panel for the identification.

Outcomes panel representation

Indication	Definition
Red text for amount without progress bar indication for Total Simulated Budget	No defined or set target amount for this scenario.
Red text for amount and red progress bar for Total Simulated Budget	Total allocated budget for planning items exceeds the scenario's set target amount.
Red text amount for Capex Budget	Capex Budget allocations exceed the scenario's Capex target.
Red text amount for Opex Budget	Opex Budget allocations exceed the scenario's Opex target.
Green text for budget amounts and green progress bar	Budget allocation for each expense types and total budget is within the scenario's set target.

Scenario planning features

In scenario planning, you can perform the following actions:

Feature	Description
Create a scenario in Strategic Planning	Create a scenario from the current plan, or another scenario, in a simulated environment to compare the scenario with the live plan and other scenarios.
Compare scenarios in Strategic Planning	Compare scenarios and the live plan side by side to review tradeoffs and items added or removed from the plans.
Approve a scenario in Strategic Planning	Approve the best scenario.
Manage scenarios in Strategic Planning	View list of scenarios, rename scenarios, and delete scenarios.

Scenario planning use cases

The following are high-level use cases for scenario planning.

- Fiscal year planning: Megan Burke, Portfolio Manager at ACME Inc, is planning for the next fiscal year and is required to prioritize planning items and align them with the organizational strategic goals. Megan creates a scenario for the portfolio plan and then uses the Prioritization tab to align items with goals. Megan holds discussions with program managers and with the financial team, creates multiple scenarios, and compares them. Megan approves the optimal scenario as a well-aligned strategic portfolio plan for the next fiscal year.

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- Mid-cycle reprioritization; Changed priorities emerging mid-year require adjustments to the current portfolio plan. John Doe, the product manager at ACME Inc, creates a scenario and incorporates the changed priorities. John adjusts the plan based on the program manager's and financial team's feedback and finalizes the plan.

Create a scenario in Strategic Planning

Create a scenario from a live plan or another scenario in a simulated environment to compare the scenario with the live plan and other scenarios.

Before you begin

Role required:

- sn_align_core.apw_user
- sn_align_ws.spw_financial_user - to view and edit financial details.

About this task

Creating a scenario enables you to visualize and anticipate potential outcomes. You can create a scenario based on the live plan or on another existing scenario. Once you have created one or more scenarios, you can compare them side by side with the live plan and approve the most desirable scenario. The scenario you approve becomes the live plan.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. Select **Create scenario**.

   Note:
   Before you have created your first scenario, you see the **Scenario planning** button on the Scenario page. In such a case, select **Scenario planning** and then you see the **Create scenario** button.

   a. Enter a name for your scenario in the **Scenario name** field.

   b. **Optional:** In the **Description** field, enter the details of your scenario.

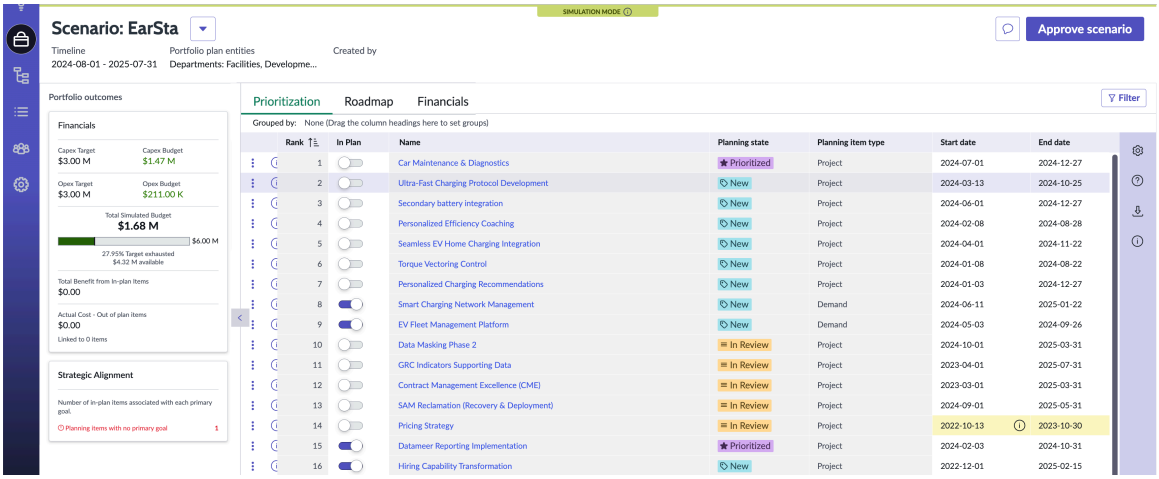
   c. In the **Copy From** field, select the *Current Plan* or the name of an existing scenario based on which you want to create the scenario.

   d. Select **Create**.
   The Scenario planning- [Scenario Name] page appears with the Prioritization tab open. The Prioritization tab lists all the planning items that you have in the live plan, or in the existing scenario that you copied the scenario from. The planning item start and end dates are determined based on the dates specified in the live plan or the actual execution dates.

   - **In Plan** toggle: By default, the **In Plan** toggle is switched on for planning items that have the planning state as Prioritized or Done and have their start dates within the portfolio plan timeline. The **In Plan** toggle is turned off for items that have the status New, In Review, or Canceled.
   - Yellow highlights for out of range dates: The planning item dates that are out of range of the portfolio plan timeline are highlighted with a yellow background. For such items, the **In Plan** toggle is turned off.

4. Use the Prioritization tab to include or exclude additional planning items in the scenario.

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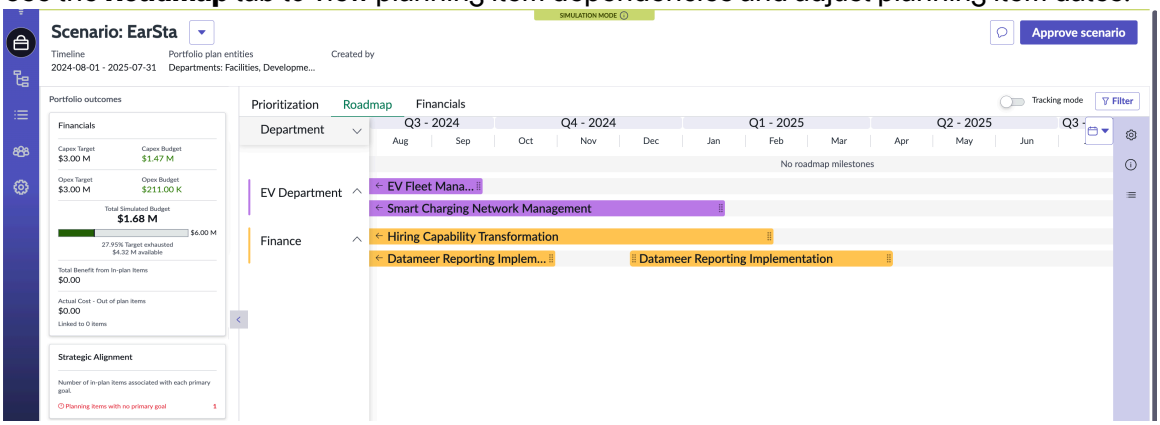


a. Optional: To exclude a planning item from the scenario, turn off the **In Plan** toggle.

b. Optional: To include a planning item in the scenario, edit the start and end dates of the item to fall within the portfolio plan timeline, and then turn on the **In Plan** toggle.

If you include out-of-timeline items in a scenario, these items remain in the scenario during the planning and prioritization process. When the scenario is approved, the dates of these items are updated to align with the scenario dates. However, because these updated dates fall outside the original portfolio plan timeline, the items are moved out of the live portfolio plan.

5. Use the **Roadmap** tab to view planning item dependencies and adjust planning item dates:



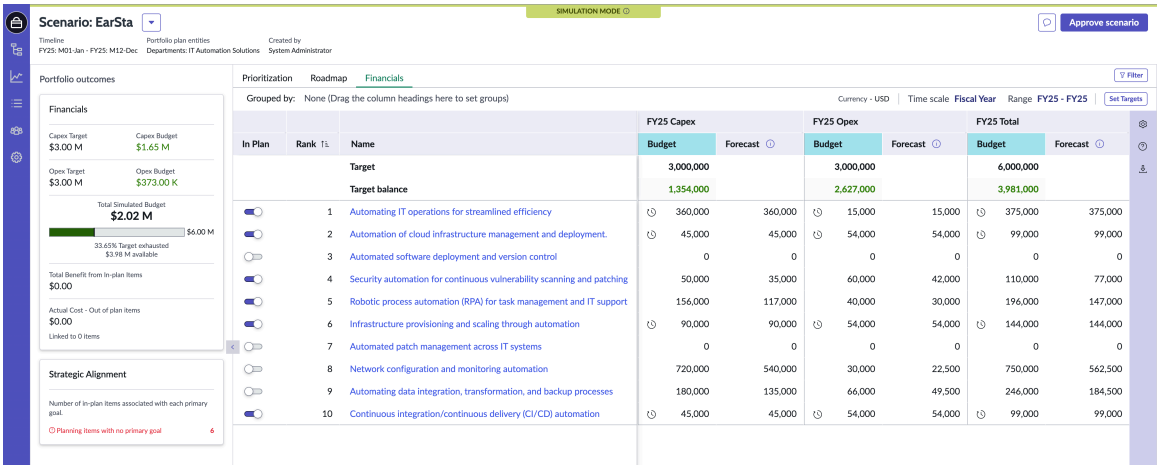
a. Drag the start or end of the planning item bars to change their start or end dates.

b. Drag the planning item bars to shift them in the plan timeline.

c. View the dependencies and milestones of the various planning items.

6. Use the **Financials** tab view the prioritize, invest, and execute the right items to provide best returns on investments for your organization.

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a. Set target for your portfolio budget.

i. Select the **Set Targets** (Set Targets) button.

ii. In the Set Targets window, set budget for an expense type or a cost type using the inline edit feature.

> **Tip:**
> You can change the **Time scale** and **Range** to set targets for each fiscal period at monthly, quarterly, or yearly cadence to meet your organization's planning cycle. The target set for a higher timescale, it is equally split it between the fiscal periods.

Once the target is set for a scenario, the **Target** row displays the defined target amount by fiscal period and budget allocation choices.

b. Include or exclude planning items in scenario using the **In-plan** toggle.

c. Add or reduce budget for individual planning items using the inline editing feature.

Changes made to the budget using while creating a scenario are marked with icon.

What to do next

- Create more scenarios, if necessary.
- Compare scenarios in Strategic Planning. You can directly compare scenarios from simulation mode by selecting **Compare scenarios** from the Scenario actions list.
- Approve a scenario in Strategic Planning

Compare scenarios in Strategic Planning

Compare scenarios side by side to confirm alignment with primary goals, evaluate comprehensive planning, optimize resource usage, confirm feasibility, and financial information.

Before you begin

Verify that you have created one or more planning scenarios and selected planning items for execution. For more information, see Create a scenario in Strategic Planning.

Role required:

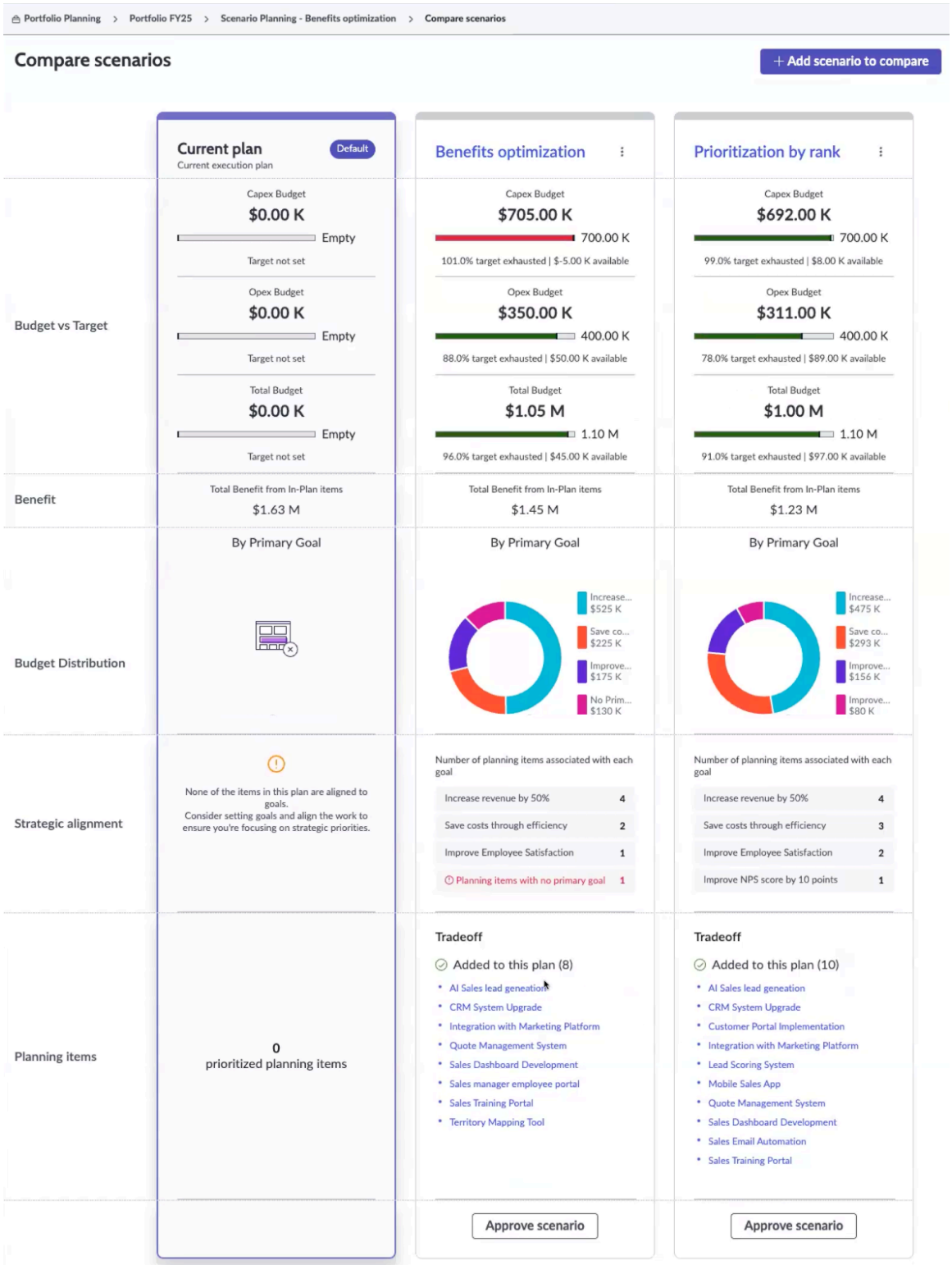
- sn_align_core.apw_user
- sn_align_ws.spw_financial_user - to view the financial widgets and details.

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Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. From the Create scenario menu, select **Compare scenarios**.
   The Compare scenarios page appears.
4. Select **Add Scenario To Compare** and select or deselect scenarios to be included in the comparison.
   You can add up to five scenarios to the comparison.
5. Select **Compare**.
   You can also view the Compare Scenario page by selecting **Compare Scenarios** from the Scenario Actions menu in the Scenario page. The Compare Scenario page appears with the scenario open in the Scenario page included in the comparison with the current plan.
   The selected scenarios appear side by side on the Compare Scenario page.
6. Compare different aspects of the scenarios such as Budget vs Target, Benefit, Budget distribution, trade offs, and alignment with primary goals.

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Visual cues in scenario comparison

Criteria	Description
Planning items with no primary goal	The planning items with no primary goals are indicated in red font.
Removed from this plan	Items that are removed from the plan when the scenario is approved, are marked with a red X.

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Criteria	Description
Added to this plan	Items that are added to the plan, when the scenario is approved, are marked with a green checkmark.

The following are some indications of the suitability of a scenario for approval:

- All planning items align with primary goals, with no items unassociated, providing a focused strategy that supports the organization's objectives effectively.
- The trade-off section includes relevant items, demonstrating comprehensive and inclusive planning that addresses various aspects of the project or initiative.
- The scenario is realistic and achievable, considering current constraints and capabilities, confirming that planned actions can be executed within the given timeframe and budget.
- Better benefit from financial planning using the widgets, Budget vs Target to validate the allocated budget against the set targets, Benefit to identify scenario with better monetary benefit, and Budget Distribution to see the amount of budget allocated to the top four goals.

7. **Optional:** Select the **Approve Scenario** button relevant to a scenario to approve it.
   For more information about approving existing scenarios in the Strategic Planning Workspace, see Approve a scenario in Strategic Planning.

What to do next

Approve a scenario in Strategic Planning

Approve a scenario in Strategic Planning

Approve a scenario that aligns with your organizational goals and offers the best business outcomes to make the scenario your current plan.

Before you begin

Ensure that you have compared the scenarios and selected the one you want to approve. For more information, see Compare scenarios in Strategic Planning.

Role required:

- sn_align_ws.scenario_approver
- sn_align_ws.spw_funding_user - to view and approve the financial changes.

About this task

When you approve a scenario:

- Planning items with the In Plan state are updated to the Prioritized state.
- Planning items that you moved out of the plan are changed to the In Review state.
- The approved dates are revised accordingly.
- Changes made to the budget of a planning item will be approved as the budget.

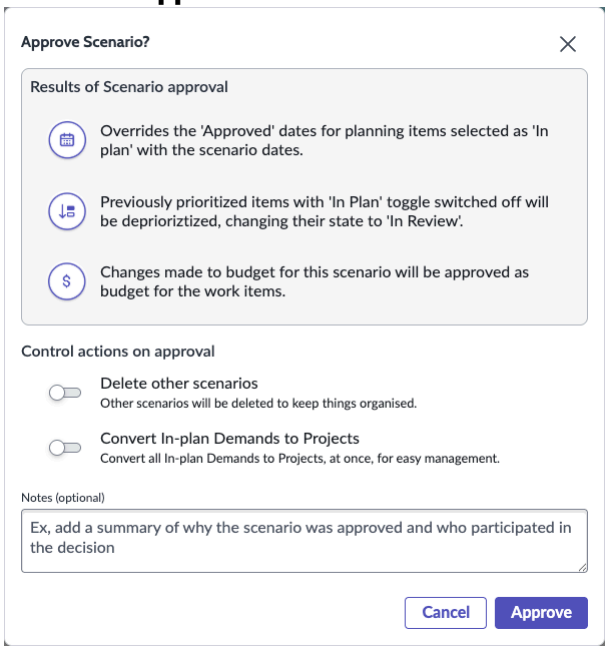
Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. From the Create scenario menu, select **Compare scenarios**.

   The **Approve scenario** button is also available on the Scenario page. As soon as you have created a scenario, you can directly approve a scenario without comparing it with the other scenarios.

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4. Select the **Approve scenario** button relevant to the scenario that you want to approve.



While approving a scenario, you can:

- Select **Convert In-plan Demands to Projects** toggle to convert the prioritized demands to projects automatically and build a functional portfolio plan.
- Delete the remaining scenarios by selecting the **Delete other scenarios** toggle.
- Enter a reason for approving the scenario in the Notes field.

5. Select **Approve**.

Manage scenarios in Strategic Planning

Use the **Manage scenarios** option to view a list of all scenarios, rename scenarios, or delete scenarios.

Before you begin

Role required:sn_align_core.apw_user

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. Navigate to **Create Scenario** > **Manage Scenarios.**.
   You can also select **Manage Scenarios** in the Recent Scenarios menu in the Scenario page.
   The Manage scenarios dialog appears with the list of scenarios relevant to the current plan.
4. Do any of the following actions.

Planning user capacity in Strategic Planning Workspace

Assess the resource capacity and review existing allocations, which help you to make informed decisions while working on assigning resources in Strategic Planning.

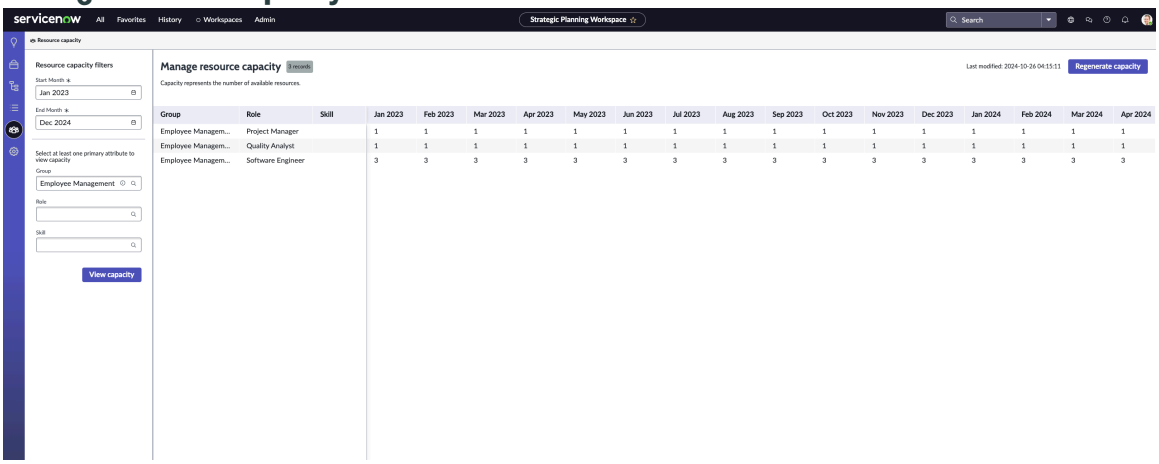
Use the manage resource capacity screen to generate resource capacity details.

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Use the Capacity screen to view detailed information about the resource capacity mapping to a portfolio.

Manage resource capacity

Manage resource capacity screen



Using Manage resource capacity, select a time frame and primary attributes to view number of available resources. Generated resource capacity details are saved. You can regenerate capacity to view latest changes in the resource availability.

Resource capacity screen helps you to view the following data.

- Resource availability for generated capacity.
- Total number of available resources in a monthly breakdown view.
- Latest date of generating the capacity details.
- Option to regenerate and fetch the latest capacity details from the employee profile mappings.

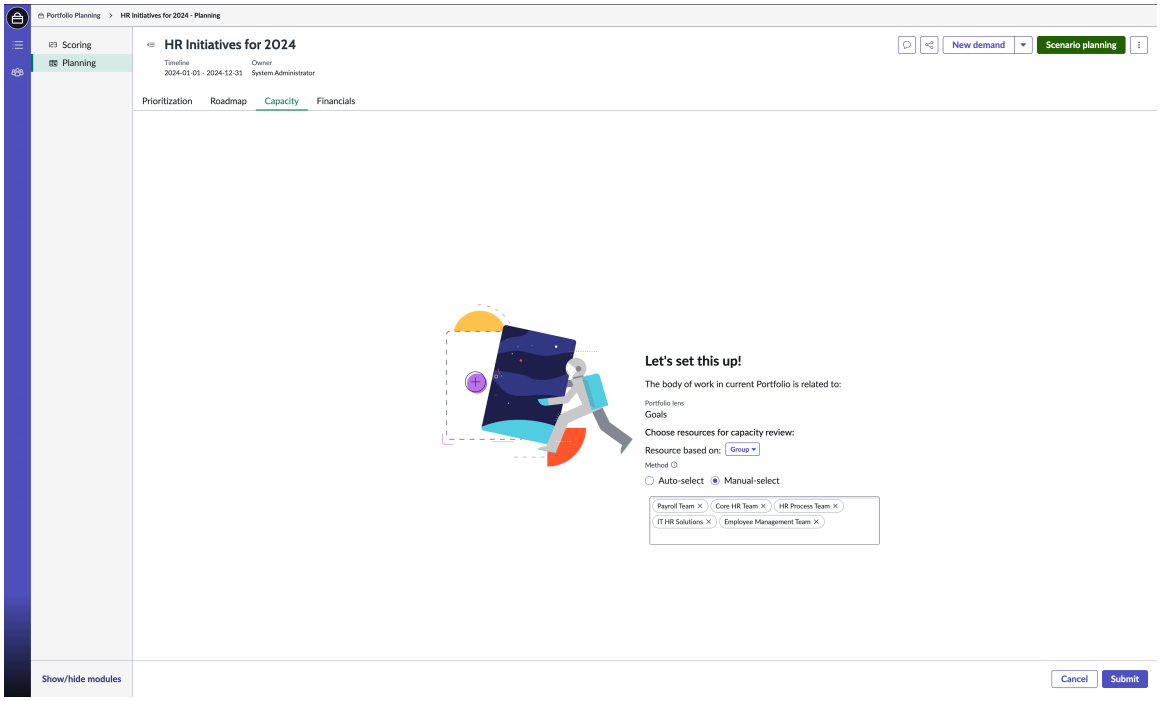
On the Manage resource capacity screen, you can:

- Filter resources with specific capacity attributes for a required date range to view the number of available resources.
- Regenerate capacity details to view the latest details from the resource employee profile mapping.

Select resource criteria

- Select a primary attribute to automatically view the available groups, roles, or skills from the resource assignments of the prioritized planning items.
- Switch between **Auto-select** and **Manual-select** option to view the allocated resource efforts for all planning items or to view a custom data, respectively.
- Define resource criteria to view the available groups, roles, or skills from the resource assignments of the prioritized planning items.

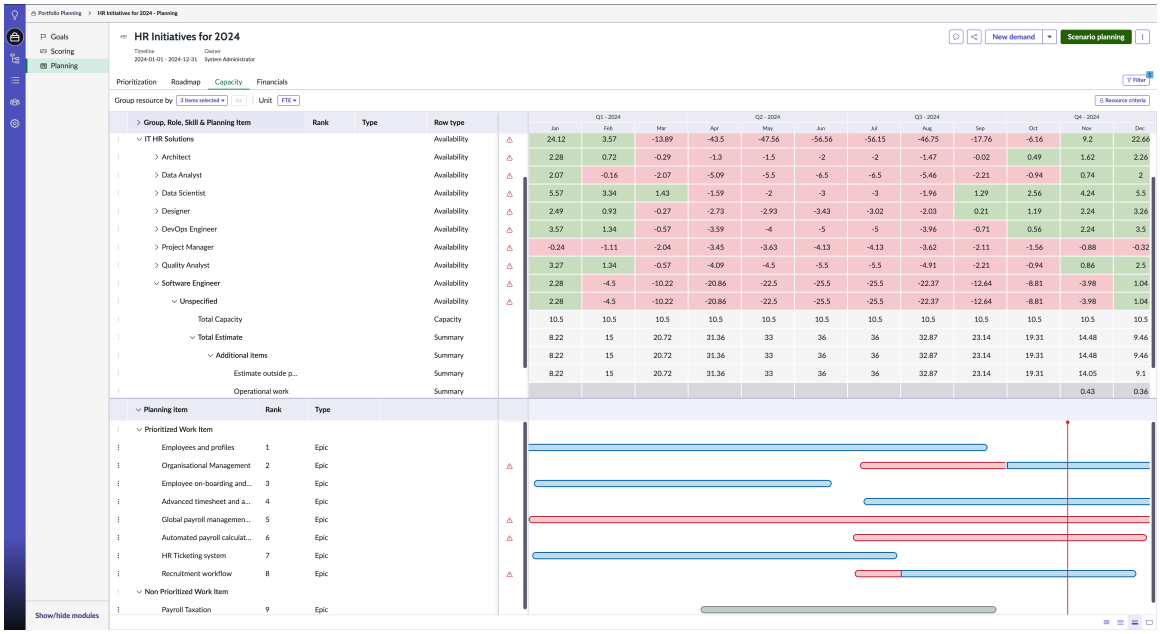
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Capacity

Capacity screen displays the resource efforts from the prioritized planning items.

- Comprehensive overview of resource capacity and allocations.
- Current resource capacity allocation.
- Interactive Gantt chat to view prioritized planning items in the bottom tray to analyze and plan work.



Understanding the Capacity screen.

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Capacity legend

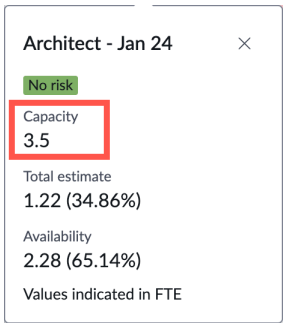
Color	Description
Yellow (Gantt bar)	Planning item with no resource assignments.
Blue (Gantt bar)	Resource estimates for Planning items are within the resource capacity.
Red (Cells and Gantt bar)	Overallocation in resource estimates.
Green (Cells)	Resource estimates within the resource capacity.

Using Capacity, you can:

- View the capacity allocations of prioritized planning items for your current portfolio and better forecast your future resource requirements.
- Use the filter option (Filter) to view planning items by their type, state, priority or any by any required attributes to create capacity plans.

> **Note:**
> Default filter is set to display prioritized planning items only.

- View the updated resource capacity based on the assigned operational resource assignments.
- View the total resource capacity in the heatmap view.



- View total resource capacity and total estimates.
- View the efforts for operational work and efforts for estimates outside of portfolio in the **Additional items** list.
- Redefine the workforce criteria by selecting **Resource criteria** ( )

Example: Calculation of Operational Resource Assignment in Capacity

As a Resource Manager, you can create operation resource assignments or migrate existing operational resource plans of your employees to handle the required meetings, trainings, time off and so on to meet your work requirements.

Consider a group with capacity of 2 FTE and resource manager creates a Group type operation resource assignment for 10% of the capacity for training. This operational assignment can be viewed in the **Operational work** line item in the top-tray of the Capacity screen. The value of the **Operational work** line item will be 0.2, which is 10% of total capacity of the group.

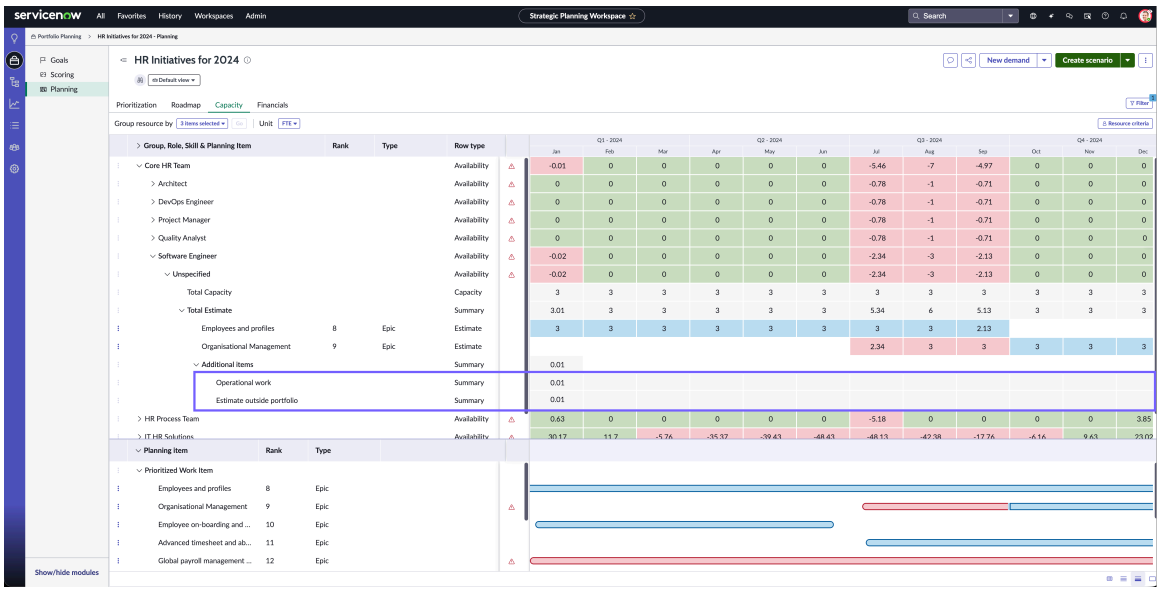
When a resource manager creates a Group type operation resource assignment for time off, this doesn't update the **Operational work** line item but reduces the total available capacity.

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Consider the same group for which resource manager creates an operation resource assignment for 25% of the capacity for time off, for a quarter from April to June. The total available capacity of the group for the quarter April to June will be 1.5 FTE, which is 75% of the total capacity after reducing the 25% time off.

0.5 FTE, which is 25% of total capacity of the group will be reduced.

Note:
The **Operational work** line item is highlighted in gray color.



Generate resource capacity

Generate and view the total capacity of the resources with primary attributes. Capacity details helps Portfolio Managers to plan and manage planning items depending on the resource availability.

Before you begin

1. Enable planning attributes for capacity planning. For more information, see Enable planning attributes for capacity planning.
2. Generate employee profiles for resources. For more information, see Generate employee profiles for resources to work with Capacity.

Role required: sn_align_ws.spw_capacity_user

Procedure

1. Navigate to **Workspaces** > *`Strategic Planning Workspace`*.
2. Select the **Resource capacity** option ( ).

Note:
If planning attributes aren't enabled for capacity planning, you see an empty state screen with an option to configure. Contact your admin to enable planning attributes for capacity planning. For more information, see enable planning attributes for capacity planning.

3. Use one the following options to view and regenerate the capacity details.

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What to do next

Use Capacity Planning to view the resource capacity, resource-to-work mapping and re-prioritize resource allocations to effective execute your prioritized planning items.

Using Capacity in Strategic Planning

View and analyze the resource capacity for your portfolio to plan and re-forecast the resource assignments.

Before you begin

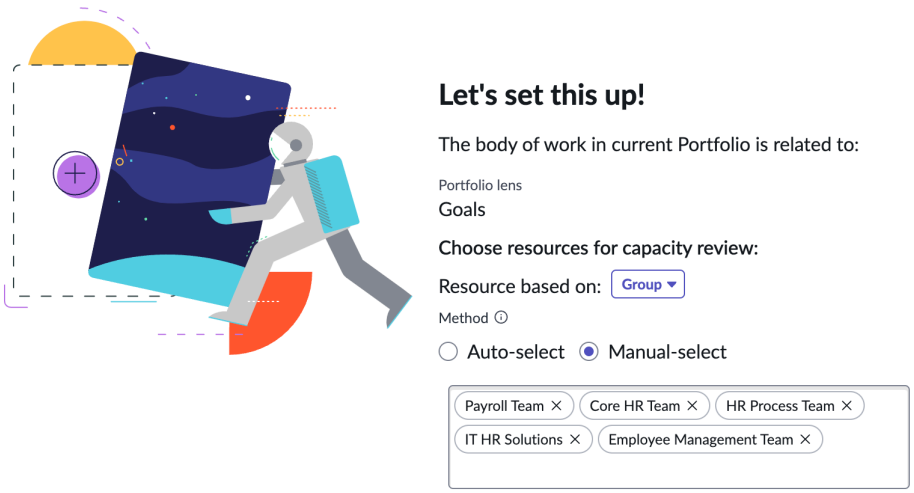
Generate resource capacity using manage resource capacity.

Role required: sn_align_ws.spw_capacity_user

Procedure

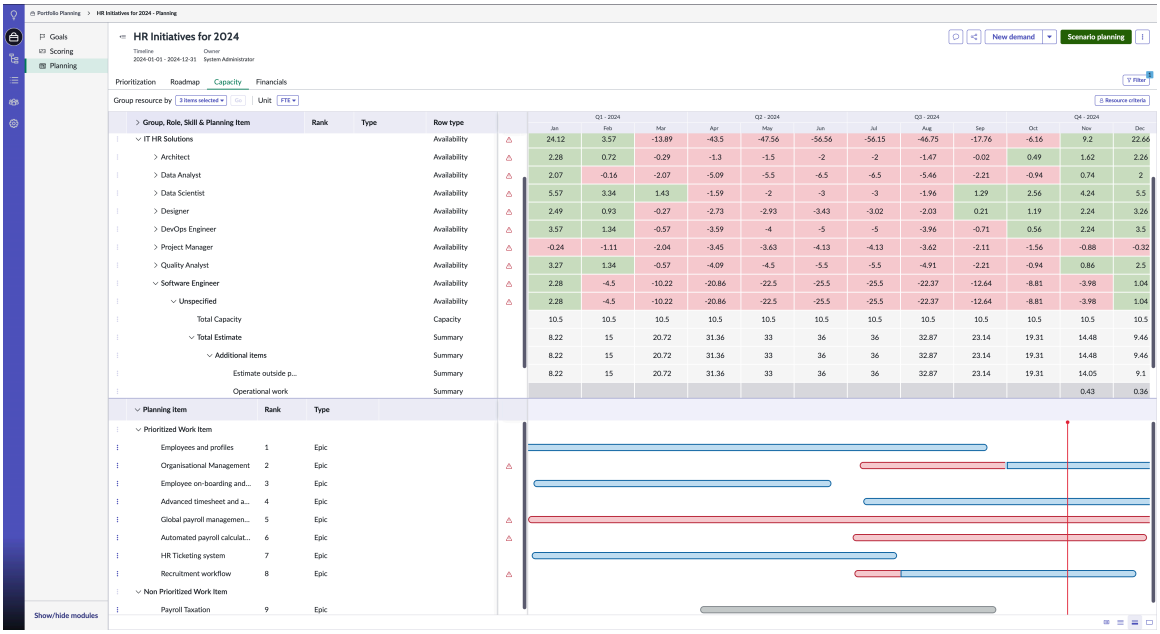
1. Navigate to **Workspaces** > *Strategic Planning Workspace*.
2. Select a plan from Portfolio Plans.
3. Select **Planning** > **Capacity**.
4. Define a resource criteria by selecting a primary attribute from the list.
   If you select Group, all the available groups from the resource assignments of the prioritized planning items are automatically displayed in the Auto-select option. You can add or remove the suggestions to view the resource capacity using the Manual-select option.

Tip:
You can always redefine and change the resource criteria to view custom results using the **Resource criteria** ( ) button.



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5. Select **Submit**.



Result

The Capacity screen for resource capacity allocation for the selected workforce criteria is displayed. Based on the workforce criteria selection, the resource capacity is nested by Group, Skill, and Role.

Managing financials for planning items in Strategic Planning Workspace

Manage budget, cost plans as forecasts, actual expenses as expense lines, generate labor costs, create financial baselines, and view, analyze, and compare the financial performance of your planning items at required cadence in Strategic Planning Workspace.

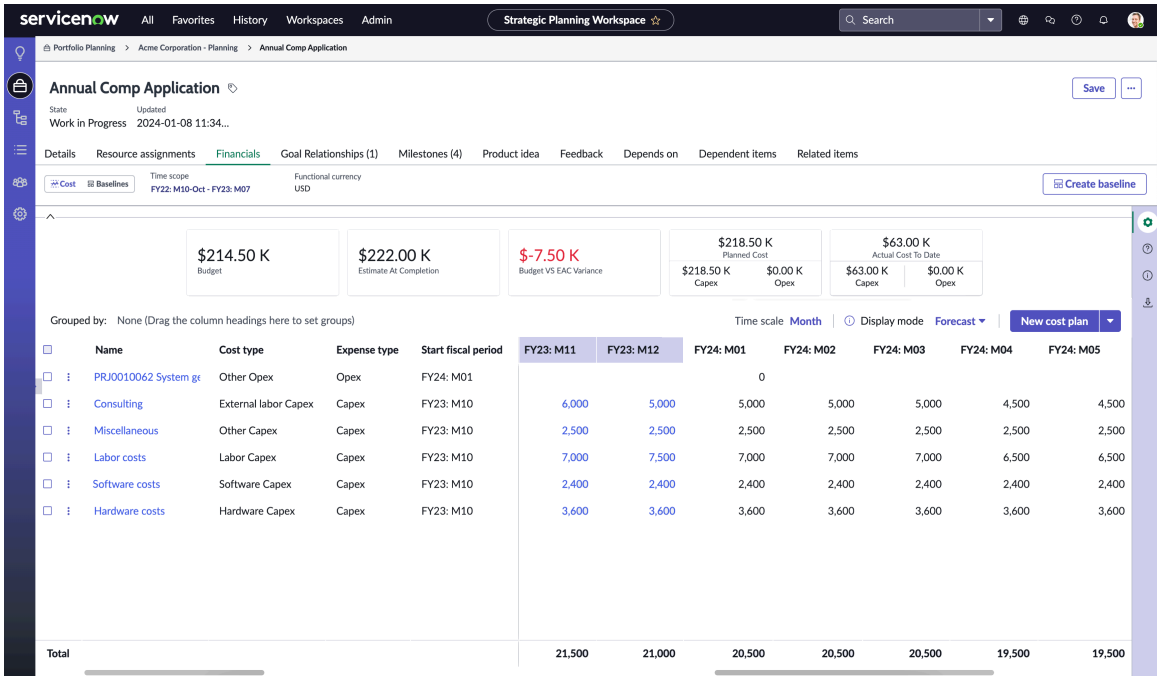
The comprehensive financials view helps you to understand planned and actual costs, Forecast (previously EAC - Estimate At Completion), Remaining Estimates (previously ETC - Estimate To Completion), Actual (previously Actuals to date), and so on, for the selected item. You can manage cost plans and associate the expense lines and process them to reflect the actuals for a planning item.

Export the financials data from Costs and benefits or Baseline comparison view as Microsoft Excel or a CSV file and share it with your stakeholders to review the financial performance of your planning items and portfolio.

Cost view

Forecast your planned costs, create, and manage cost plans and expense lines to track the financial performance of your planning items, review the latest costs and actuals.

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In the Cost screen, you can:

- As a Project Manager, you have the enhanced visibility and ability to manage the financial data across multiple project levels. Cost view of financials shows cost plans and expense lines from sub-projects, allowing you to track the finances.
- The parent project widgets display the consolidated values of forecasted costs and expenses.
- Identify and manage costs using the **Project/Demand** column for any sub project or demand directly from Cost view of the parent planning item.
- Re-forecast all the cost plan values for future fiscal periods by double-clicking to edit the value in the least time scale view, either by month or by period.
- Manage cost plans for your planning items. For more information, see Add, edit, or delete cost plans.
- Add or edit expense lines for your planning items to record any planned or unplanned expenses. For more information, see Add or edit expense lines.
- Generate labor costs based on the resource assignments. For more information, see Generate labor costs.
- Create and compare baselines to capture the financial snapshot of your planning items. For more information, see Create and compare financial baselines for your planning items.
- Configure widgets to get a high-level overview of the financial data for your planning item.
- All financial details from sub-projects will be aggregated and displayed in the parent project's cost plans and widgets.

Tip:
Cost view gives you enhanced user experience to customize the left pane columns by using the personalize icon ( ) and by saving user preferences to retain the customizations made to hide, view, or adjust columns, time scope viewing, and so on.

Multicurrency

Multicurrency feature enables you to manage financials of your planning items in two different currencies, Functional currency and Investment currency. Functional currency is typically

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defined by the admin based as the primary currency which is used for planning, budgeting, and tracking the financials of your planning items.

Important:
Following are the current limitations for multicurrency.

- Multicurrency for cost plans that are bundled with project tasks. This feature is scheduled to be available starting with the January patch update.
- Financial baselines don't capture investment currency fields. This feature will be available with the March store release.

Financial users can now perform the following financial activities in Investment currency.

- Ability to select the Investment currency.
- Track the planned and actual expenses.
- Allocate and manage the budget.
- View simple financials data.

Important:
New customers should install the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin to enable multicurrency feature and Activate scheduled job to populate to multicurrency fields.

Using this feature, you can work on financial reporting at global level and see the real-time currency conversions of your financial records.

Organizations operation at global or multinational level, the work is planned and financed at one location and executed at a different location. Each might use a different currency from what was used in the planning phase, multicurrency makes it easy to manage and track your planning items using any currency.

You can monitor and track the financials in one currency, and capture the costs in a different currency.

Using multicurrency, you can see all the costs in the currency you choose for the planning item, instead of restricting to use Functional currency defined in your locale. For more information on how to choose investment currency of your planning items, see Configure multicurrency for planning items.

Financial records and widgets will display the costs based on the currency selection.

Note:
Once a cost plan, benefit plan or expense line or an investment budget gets created, you will not be able to change investment currency. You can change the investment currency as long as there are no financial records captured against the planning item.

Display modes

On the financials page for a planning item in Strategic Planning Workspace, you have Display Mode drop-down switch between different modes to view different formats of financial information of your planning items. These views provide the relevant and focused information which helps project managers and funding users to work on the financial planning.

- Forecast
- Budget vs forecast

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- Planned vs actual
- Planned

Users with financial funding role [sn_align_ws.spw.funding_user] will see Budget allocation option instead of the Budget vs forecast.

Display modes value

Mode	Value
Forecast	View Actuals, Remaining estimates, and Forecast for the entire scope of the planning items. Use the time scale to view the actuals for the past fiscal periods and planned costs for the current and future fiscal periods.
Budget vs forecast	View the Budget, Actuals, and Variance for the fiscal periods and Forecast values for the entire scope of the planning items. Using this mode, you can: • Compare the latest forecasts with the approved budget at different time scales. • View the budget vs actual for past fiscal periods and budget vs planned for current and future fiscal periods at fiscal period level.
Budget allocation (funding role)	View the Budget, Actuals, and Variance for the fiscal periods and Forecast values for the entire scope of the planning items. Using this mode, funding users can: • View the latest forecast and enter the budget that can they be approved to the work item. • Analyze the variance for the past fiscal periods and work on budget allocation for future fiscal periods. • Compare latest forecast with approved budget and revise the budget, if required.
Planned vs actual	Compare the planned costs with actual expense for the past and current fiscal periods, and view planned costs for the future fiscal periods.
Planned	View only planned costs for the full range and manage the planned costs using the inline editing feature.

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Note:

- If you do not see the Budget allocation or Budget vs forecast display options, enable the budget allocation property and configure the budget attribute at instance level.
- To work on budget allocation using the Next Experience, Activate a scheduled job to migrate budget of your planning items.

The last selected view is saved as user preferences.

Default display mode and access level for financial users

User role	Default mode	Role-level access
sn_align_ws.spw_funding_user	Budget Allocation	Allocate and approve budget, manage cost plans and expenses lines.
sn_align_ws.spw_financial_user	Forecast	Manage cost plans and expense lines.
business_stakeholder	Forecast	View financial data.

Baseline view

Create a baseline to capture a snapshot of the financial changes for your planning items. You can create on-demand baselines or at a cadence using a scheduler job.

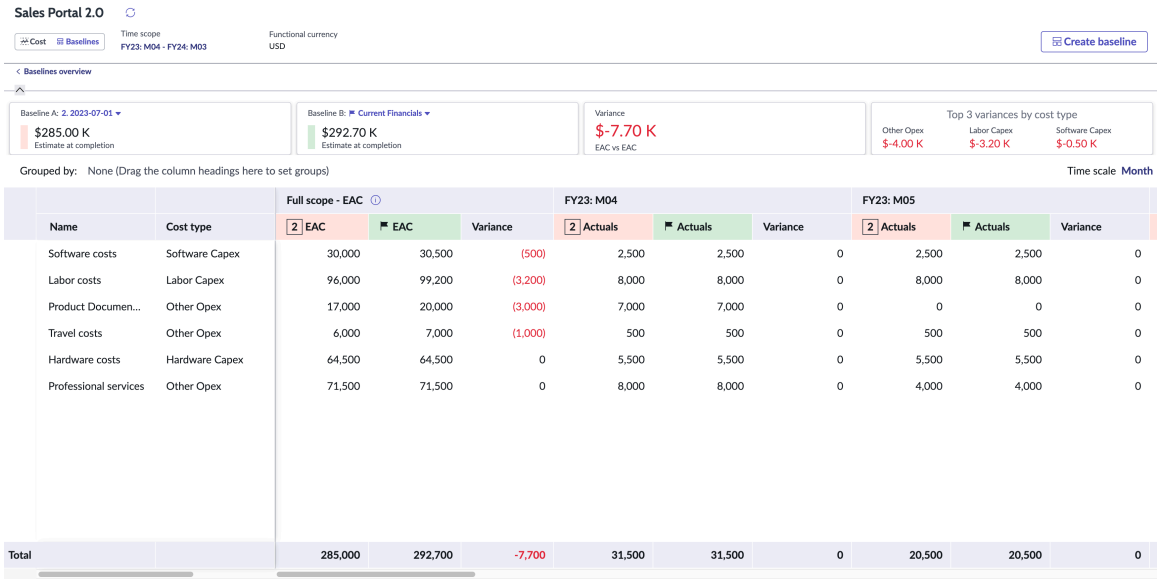
Note:
Baselines created on the parent project includes the cost plans and expense lines from all of the child projects to calculate and give you a better breakdown of the financial performance of the projects and sub-projects.

Compare baselines to compare the difference in costs between latest status against a baseline or between any two baselines.

Note:
Each baseline is tagged with a number based on the order that they're created. The Current Financials baseline captures the financials details in real-time and is always represented with a flag icon (⚑).

The baselines comparison view helps you to understand the variances between the two baselines.

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		Full scope - EAC			FY23: M04			FY23: M05		
Name	Cost type	2 EAC	EAC	Variance	2 Actuals	Actuals	Variance	2 Actuals	Actuals	Variance
Software costs	Software Capex	30,000	30,500	(500)	2,500	2,500	0	2,500	2,500	0
Labor costs	Labor Capex	96,000	99,200	(3,200)	8,000	8,000	0	8,000	8,000	0
Product Documen...	Other Opex	17,000	20,000	(3,000)	7,000	7,000	0	0	0	0
Travel costs	Other Opex	6,000	7,000	(1,000)	500	500	0	500	500	0
Hardware costs	Hardware Capex	64,500	64,500	0	5,500	5,500	0	5,500	5,500	0
Professional services	Other Opex	71,500	71,500	0	8,000	8,000	0	4,000	4,000	0
Total		285,000	292,700	-7,700	31,500	31,500	0	20,500	20,500	0

Use the widgets when you compare baselines to view:

- Two dedicated widgets for each baseline displaying the EAC.
- Third widget displays the total variance between the EAC values of the selected baselines.
- Fourth widget displays the top three variances contributing to the overall variance by cost type.

The widgets and the header rows are color-coded to help you identify the selected baselines.

Tip:
Switch between different baselines from the comparison view by selecting the name of a baseline from one of the widgets.

When you compare baselines, you get the list of cost plans with their associated costs types, EAC at full scope, and a breakdown view of actual expenses and planned costs.

By default, the time scale of the breakdown view is set to Month.

- Use the **Time scale** option to view the comparison breakdown view at monthly, quarter, and yearly levels.
- Select **Time scope** to filter fiscal periods, data in the widgets, and the comparison table.

The widgets and the header rows are color-coded to help you identify the selected baselines.

Tip:
Select the name of a baseline from the first or second widget to compare different baselines.

Let's take an example of the comparison view of two baselines: 2023-10-01, Baseline A, and Current Financials, Baseline B.

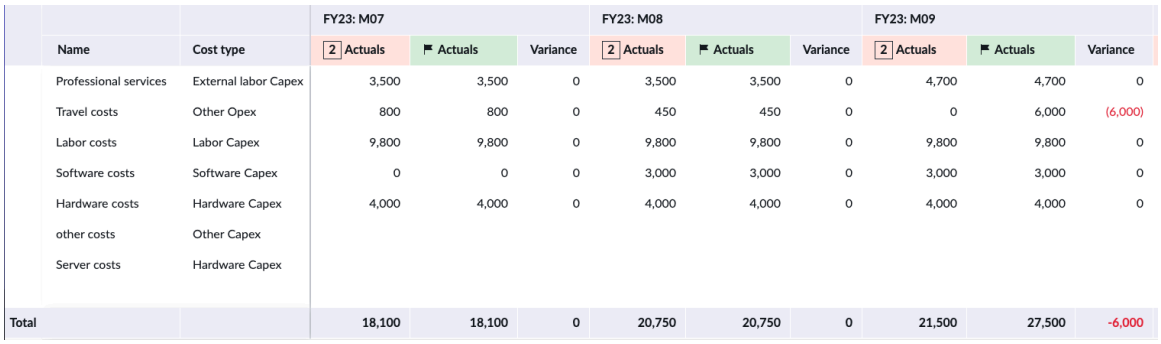
Example: How actuals, planned, and EAC are compared between two baselines captured at different timestamps

For a selected baseline, based on the creation date, the table shows Actuals values for the past fiscal periods from the created date and Planned values for the current and future fiscal periods.

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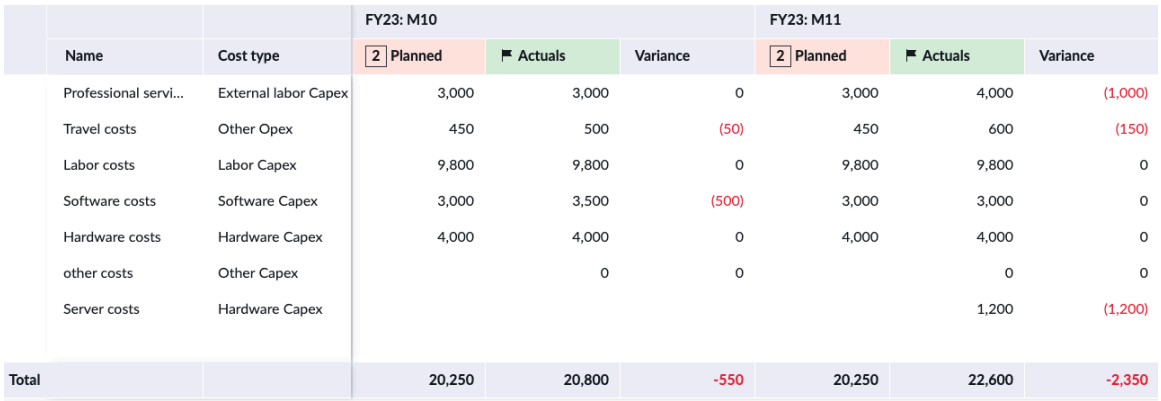
Consider a planning item scoped from July 2023 to June 2024. Baseline A is created on 2023-10-01. If you compare the Current Financials baseline in December 2023 to the baseline captured in October 2023:

1. The baseline comparison view show Actuals vs Actuals columns from July 2023 to September 2023.



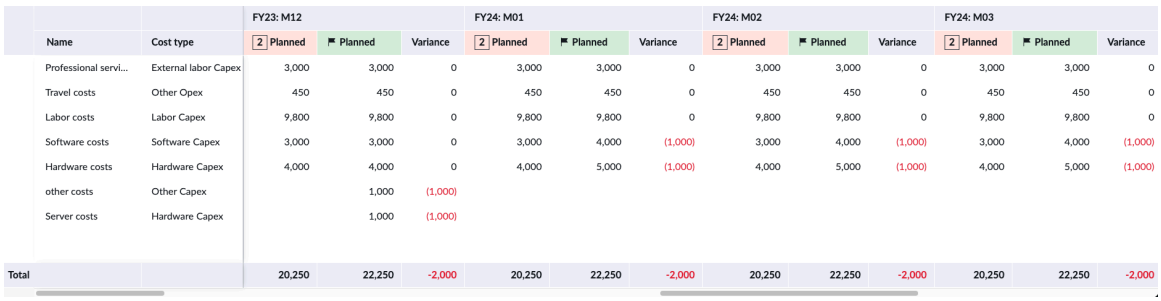
			FY23: M07			FY23: M08			FY23: M09		
	Name	Cost type	2 Actuals	Actuals	Variance	2 Actuals	Actuals	Variance	2 Actuals	Actuals	Variance
	Professional services	External labor Capex	3,500	3,500	0	3,500	3,500	0	4,700	4,700	0
	Travel costs	Other Opex	800	800	0	450	450	0	0	6,000	(6,000)
	Labor costs	Labor Capex	9,800	9,800	0	9,800	9,800	0	9,800	9,800	0
	Software costs	Software Capex	0	0	0	3,000	3,000	0	3,000	3,000	0
	Hardware costs	Hardware Capex	4,000	4,000	0	4,000	4,000	0	4,000	4,000	0
	other costs	Other Capex									
	Server costs	Hardware Capex									
Total			18,100	18,100	0	20,750	20,750	0	21,500	27,500	-6,000

2. Planned vs Actuals for October 2023 and November 2023.



		FY23: M10			FY23: M11		
Name	Cost type	2 Planned	Actuals	Variance	2 Planned	Actuals	Variance
Professional servi...	External labor Capex	3,000	3,000	0	3,000	4,000	(1,000)
Travel costs	Other Opex	450	500	(50)	450	600	(150)
Labor costs	Labor Capex	9,800	9,800	0	9,800	9,800	0
Software costs	Software Capex	3,000	3,500	(500)	3,000	3,000	0
Hardware costs	Hardware Capex	4,000	4,000	0	4,000	4,000	0
other costs	Other Capex		0	0		0	0
Server costs	Hardware Capex					1,200	(1,200)
Total		20,250	20,800	-550	20,250	22,600	-2,350

3. Planned vs Planned from December 2023 to June 2024.



		FY23: M12			FY24: M01			FY24: M02			FY24: M03		
Name	Cost type	2 Planned	Planned	Variance	2 Planned	Planned	Variance	2 Planned	Planned	Variance	2 Planned	Planned	Variance
Professional servi...	External labor Capex	3,000	3,000	0	3,000	3,000	0	3,000	3,000	0	3,000	3,000	0
Travel costs	Other Opex	450	450	0	450	450	0	450	450	0	450	450	0
Labor costs	Labor Capex	9,800	9,800	0	9,800	9,800	0	9,800	9,800	0	9,800	9,800	0
Software costs	Software Capex	3,000	3,000	0	3,000	4,000	(1,000)	3,000	4,000	(1,000)	3,000	4,000	(1,000)
Hardware costs	Hardware Capex	4,000	4,000	0	4,000	5,000	(1,000)	4,000	5,000	(1,000)	4,000	5,000	(1,000)
other costs	Other Capex		1,000	(1,000)									
Server costs	Hardware Capex		1,000	(1,000)									
Total		20,250	22,250	-2,000	20,250	22,250	-2,000	20,250	22,250	-2,000	20,250	22,250	-2,000

Note:
The columns are defined to calculate EAC, which is the sum of Actual costs till the last fiscal period and Planned costs from current to future fiscal periods.

Budget allocation

Portfolio managers can manage and approve the budget for planning items. The approved budget helps project managers to plan and meet the expenses to execute work.

Plan and approve the budget for a shorter planning cycle at monthly, quarterly, or yearly level using the lean budgeting and funding feasibility. Lean budgeting helps Portfolio managers to track the value in return for the approved budget and to better plan the budget for future fiscal periods.

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Note:
If the budget is allocated monthly, the total budget is rolled up to quarterly and yearly level. Similarly, if the budget is allocated at a quarterly or yearly level, the equal breakdown happens till monthly level.

For more information on how to allocate, approve, and handle budget for planning items, see, Manage budget of your planning items in Strategic Planning.

Tip:
In the budget allocation view, Portfolio managers review the EAC to understand the financial projections made by Project managers and use the **Copy cost as budget** option to allocate the entire planned cost as budget.

Choose the cost type as the attribute to allocate and approve the budget for individual cost types such as labor, non-labor.

Project managers can view the approved budget at the required time scale using the Budget vs forecast option from the display modes. As the work progresses and the actuals are captured, you can compare the budget and actual costs using the Budget vs forecast mode and reforecast the planned costs where the actuals are exceeding the budget using the inline edit feature at the required time scale.

Product managers can compare the latest cost with the approved budget by Capex or Opex, cost types, and for the required time scale at monthly, quarterly, or yearly level. The comparison view provides insights to Product managers to locate any variance at expense type or cost type, and at which fiscal period. Product manager can leverage this information to request for additional budget from the Portfolio manager.

You can migrate the budget of existing active projects and demands items from the Classic UI to Next Experience. Financials in the Next Experience has new budget data model that facilitates to store the budget at a detailed level by monthly breakdowns and cost types. You can migrate the budget for active projects and demands individually or by bulk using the scheduled job.

- Migrate budget of active projects from Classic UI to Next Experience. For more information, see Migrate budget of active projects to Next Experience.
- Migrate budget of active demands from Classic UI to Next Experience. For more information, see Migrate budget of active demands to Next Experience.

Note:
The migrated budget is captured in the `sn_invst_pln_invst_budget` table to enable the lean budgeting for required time scope.

Benefit plans

Monetary benefit plans capture potential benefits accrued while executing a planning item. Non-monetary benefit plans capture the potential non-financial benefits accrued while executing a planning item. You can create and manage monetary benefit plans and non-monetary benefit plans to capture the potential benefits of your planning items.

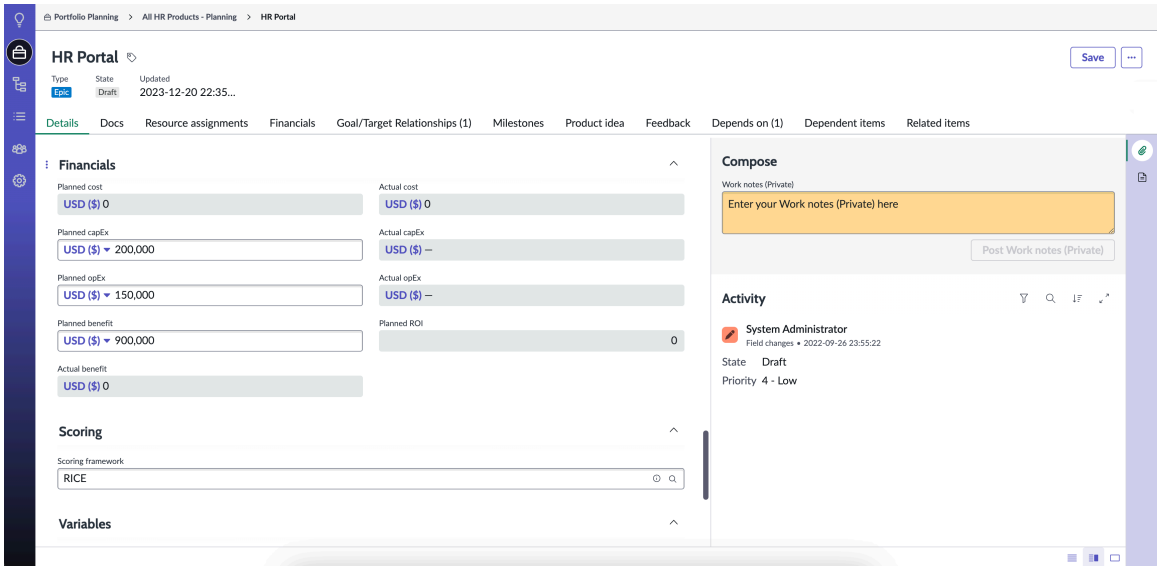
Instead of switching to and fro from the financials record page to benefit plan tabs, you now have a seamless experience to manage all the cost plans and benefit plans from the Cost and benefits view and can leverage the new financials experience with the side panel and grids for quick forecasting and tracking of monetary benefit plans.

Simple financials

Simple financials gives you the ability to enter the preliminary high-level planned capex, opex, benefit and so on from the Details page without capturing the costs plans from the Cost view. You

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can update the simple financials values as required until you have the planned and actual costs captured.



Using the baseline feature, you can capture these simple financial values in a baseline and compare them against any existing baseline. You can:

- Reforecast simple financials and compare the by selecting the Current Financials from the list of baselines.
- Capture the planned and actual expenses as the project progresses and compare any financial baseline with a simple financials baseline to track the financial performance of the planning item.

Configure multicurrency for planning items

Select investment currency as an additional currency, which can be different from your functional currency, to manage financial records of your planning items.

Before you begin

- Enable monetary benefit plans for planning items
- Role required: admin

Procedure

1. Navigate to **Workspaces** > *Strategic Planning Workspace* and select portfolio plan.
2. Select a planning item from the Planning module.
3. Select the **Financials** tab.
   In the **Currency** field, the current system currency is displayed. For example, if your Functional currency is in USD, the field is displayed as **USD (Functional)**.
4. Select **Confirm** to save the investment currency selection.

Add, edit, or delete cost plans

Create a cost plan for a required duration to track your planned and actual expenses. Edit cost plans to adjust your planned expenses and delete any de-scoped forecasts.

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Before you begin

Role required: sn_align_ws.spw_financial_user

Procedure

1. Navigate to **Workspaces** > *Strategic Planning Workspace* and select portfolio plan.
2. Select a planning item from the Planning module.
3. Select the **Financials** tab.

Tip:

Create a financial baseline immediately after capturing the initial planned costs to have a snapshot of your planned costs. Use this baseline to compare it against the baselines from later dates, as the work progresses, to identify the variance between initial planned costs and actual expenses.

This helps you to plan for the future expenses and re-forecast the planned costs.

Manage budget of your planning items in Strategic Planning

Allocate, manage, and approve budget for your planning items. Lean budgeting enables you to allocate budget for short planning cycles for different fiscal periods such as monthly, quarterly, or yearly breakdown level rather than allocating the budget to the complete duration of the planning item.

Before you begin

- As an Admin, enable the property to work on budgeting. For more information, see Enable financial budget allocation for planning items in Strategic Planning.
- As an Admin, configure the attribute to allocate and approve budget by cost type or expense type. For more information, see Configure budget attribute at instance-level to allocate budget.
- Role required: it_portfolio_manager

Procedure

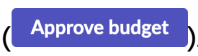
1. Navigate to **Workspaces** > *Strategic Planning Workspace* and select portfolio plan.
2. Select a planning item from the Planning module.
3. Select the **Financials** tab.
4. Enable the **Budget allocation** toggle (

).
5. You can manage the budget by one of the following ways for the selected time scale at monthly, quarterly, or yearly level.
   - Double-click each cell in the Budget column to manually enter the value.
   - Select **Copy cost as budget** from the Budget column options to copy the EAC as budget.

   You can always reforecast the budget for each cost type using the in-grid editing feature even if the EAC is copied as budget.

Note:

Unapproved budget values are indicated with  icon.

6. Select **Approve budget** (

).

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Approve budget confirmation window is displayed. The **Create a financial baseline for this budget approval** option is enabled by default which captures the latest budget and financial estimates.

> **Tip:**
> The financial baseline created while approving the budget can be compared with the future baselines once the actual expenses are captured to track financial performance.

7. On the confirmation window, select **Approve** (Approve).

Result
Budget widget is updated to reflect the latest approved budget. Project Manager can view the approved budget and compare it with the planned costs using the **budget vs cost** view by cost type.

Add or edit expense lines

Create or edit expense lines to capture the actuals costs. You can associate the expense lines with a cost plan or create standalone expense lines to record unplanned expenses.

Before you begin
Role required: sn_align_ws.spw_financial_user

About this task
An expense line is part of the project cost plans that can be associated with a specific source. You can create multiple expense lines for a cost plan. Only the expense lines that are in the processed state are considered for roll ups on the work item.
For unplanned expense lines which are not associated to any cost plan, system automatically creates an cost plan or associates to an existing system generated cost plan of the same expense type.

Procedure
1. Navigate to **Workspaces** > *Strategic Planning Workspace* and select portfolio plan.
2. Select a planning item from the Planning module.
3. Select the **Financials** tab.
4. Use one of the following options to add an expense line.

5. On the Create expense line form, fill the fields.
   For a description of the field names, see Create expense line form.
6. Select **Save**.

> **Note:**
> The expense lines created for sub projects can be viewed in the Cost screen of the parent project.

7. To edit a cost plan from the finanicals record page, select the actuals value from the cost plan to ex[open the Expense line side panel.
8. Select the expense you want to edit.
9. Update the expense values as needed and select **Save**.

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Generate labor costs

Generate labor costs in the Financials view for attribute-based resource assignments based on the financial attributes configured in the planning attributes page.

Before you begin

Role required: sn_align_ws.spw_financial_user

Procedure

1. Navigate to **Workspaces** > *Strategic Planning Workspace* and select portfolio plan.
2. Select a planning item from the Planning module.
3. Select the **Financials** tab.
4. Select **Generate labor costs** (

).
5. Select **Generate** on the Generate labor costs confirmation window.

Note:
Alternatively, you can activate a scheduled job to automatically create baselines at the required cadence.

Create and compare financial baselines for your planning items

Create and compare financial baselines to get a snapshot of the project expenses and compare the planned costs against the actual expenses.

Before you begin

Role required: sn_align_ws.spw_financial_user

Procedure

1. Navigate to **Workspaces** > *Strategic Planning Workspace* and select portfolio plan.
2. Select a planning item from the Planning module.
3. Select the **Financials** tab.
4. Create or compare baselines.

Tip:
You can migrate existing financials baselines of your projects or demands from Classic UI to Financials in Next Experience.

For more information on how to migrate financial baselines of demands, see Migrate financial baselines of demands to Next Experience.

For more information on how to migrate financial baselines of projects, see Migrate financial baselines of projects to Next Experience.

Create monetary benefit plans for your planning items in Strategic Planning

Create and manage monetary benefit plans to capture the potential benefits while executing your planning items.

Before you begin

- Add monetary and non-monetary benefit plans related lists
- Role required: sn_align_ws.spw_financial_user

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Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select a portfolio plan.
3. From the Prioritization or Roadmap tab, select the planning item to create a monetary benefit plan.
   The full details page of the planning item is displayed.
4. Select the **Monetary Benefit Plans** related list.
5. Select **New**.
6. On the Benefit Plan form, fill the fields.
   For a description of the field names, see Benefit Plan form.
7. Select **Save**.

Result

The newly created monetary benefit plan appears in the finanicals record page and in the monetary benefit plans related list.

What to do next

- Edit monetary benefit plans.
- Capture actual monetary benefits.

Edit monetary benefit plan

Edit a planned monetary benefit plan to revise the benefits, dates, offset, and so on, to maintain the updated financial records as your work progresses.

Before you begin

- Create monetary benefit plans for your planning items in Strategic Planning
- Role required: sn_align_ws.spw_financial_user

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the Prioritization or Roadmap tab, select the planning item for which you want to edit a monetary benefit plan.
   The full details page of the planning item is displayed.
3. Select the **Monetary Benefit Plans** related list.
4. Select the name of a required benefit plan.
5. In the Details tab, edit the required fields and select **Save**.

Capture actual monetary benefits

Capture the actual benefit from the planned benefits to measure revenue and calculate the profits.

Before you begin

- Create monetary benefit plans for your planning items in Strategic Planning
- Role required: sn_align_ws.spw_financial_user

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Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select a portfolio plan.
3. From the Prioritization or Roadmap tab, select the planning item for which you want to capture actual monetary benefits.
   The full details page of the planning item is displayed.
4. Select the **Monetary Benefit Plans** related list.
5. Select name of the required benefit plan and select the **Monetary Benefit Plan Breakdowns** list to view the monetary benefit plans breakdown.
6. Select the value from the **Entered benefit** field.
7. **Optional:** You can change the previously captured planned benefit from the **Entered benefit** field.
8. Enter the actuals benefits resulted from the work execution in the **Actual benefit** field and select **Save**.

Manage non-monetary benefit plans for your planning items in Strategic Planning

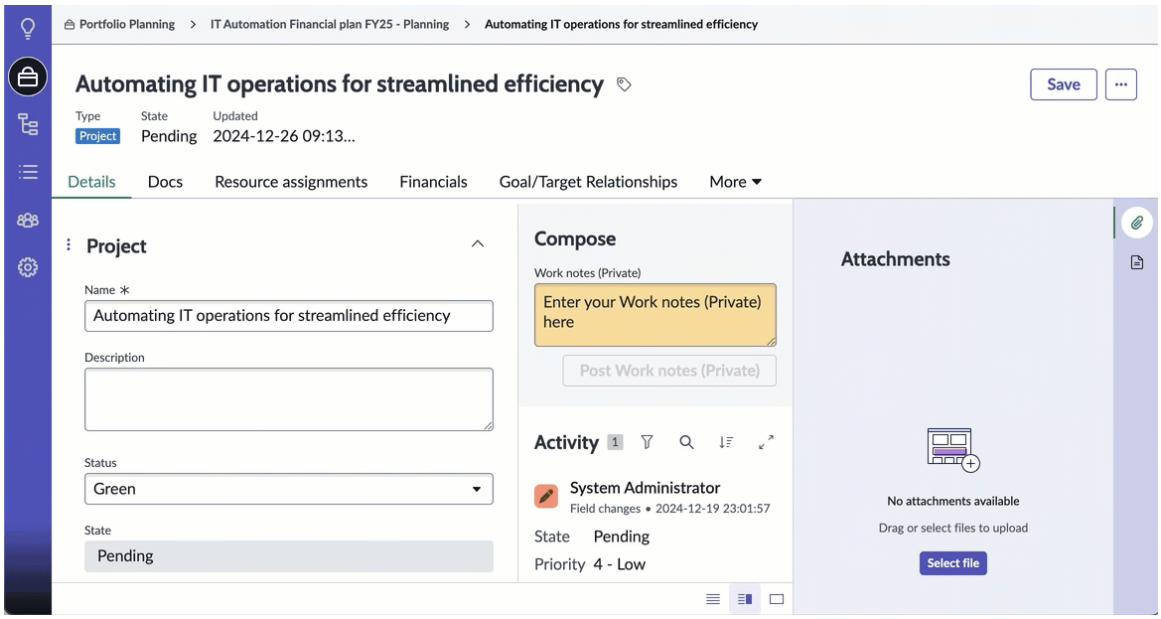
Create and manage monetary benefit plans to capture the potential benefits while executing your planning items.

Before you begin

Role required: sn_align_ws.spw_financial_user

Procedure

1. Navigate to **Workspaces** > *Strategic Planning Workspace* and select portfolio plan.
2. Select a planning item from the Planning module.
3. Select the **Non-monetary Benefit Plans** related list.



4. On the Benefit Plan form, fill the fields.
   For a description of the field names, see Benefit Plan form
5. Select **Save**.

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Export financials as Excel or CSV file

Export the costs or baseline comparison data of your planning items to easily share them with your stakeholders.

Before you begin

Role required: sn_align_ws.spw_financial_user

Procedure

1. Navigate to **Workspaces** > *Strategic Planning Workspace* and select a planning item.
2. Select the **Financials** tab.
3. Select the Export option ( ).
4. In the Export side panel, select **Excel** or **CSV** from the File type list and select the **Export** button (

).

   The financials data is download as an Excel or CSV file with `name_fin_mmddyy` naming convention. The breakdown of the naming convention:

   a. name - fetches the first 10 characters from the name of the planning item.

   b. fin - denotes that the file has financial data.

   c. mmddyy - system date format when you're exporting this data.
   For example, if you're downloading financials data for a planning item named Documentation on January 26, 2024, then the file name reads `documentat_fin_012624`.

> **Note:**
> You can export financials data from Cost view and Baselines comparison view.

Managing portfolio financials in Strategic Planning Workspace

View the financial breakdown of estimates, approved costs, benefits, and actuals and so on for portfolio financials.

As a portfolio user, you can view the rolled up financial values of top-level demands, projects, and epics.

You can view the costs by expense type or cost type. Using the Financials view at portfolio level, you can view different financial fields such as Budget (approved budget for planning items), Forecast, Variance (difference between the approved budget and latest forecast), Actuals, and the Remaining Estimates for Capex, Opex, Total, and Benefits for each planning item. This information can be used to track the financials status of the planning items and take an informed decision on which planning items to consider while working on the next planning cycle and track the to avoid overspending.

Using the portfolio financials, portfolio managers can:

- Track the financial performance and status of planning items.
- Arrive at an informed decision by analyzing the estimated cost and benefits of a planning item while planning and prioritizing for the next Portfolio cycle.

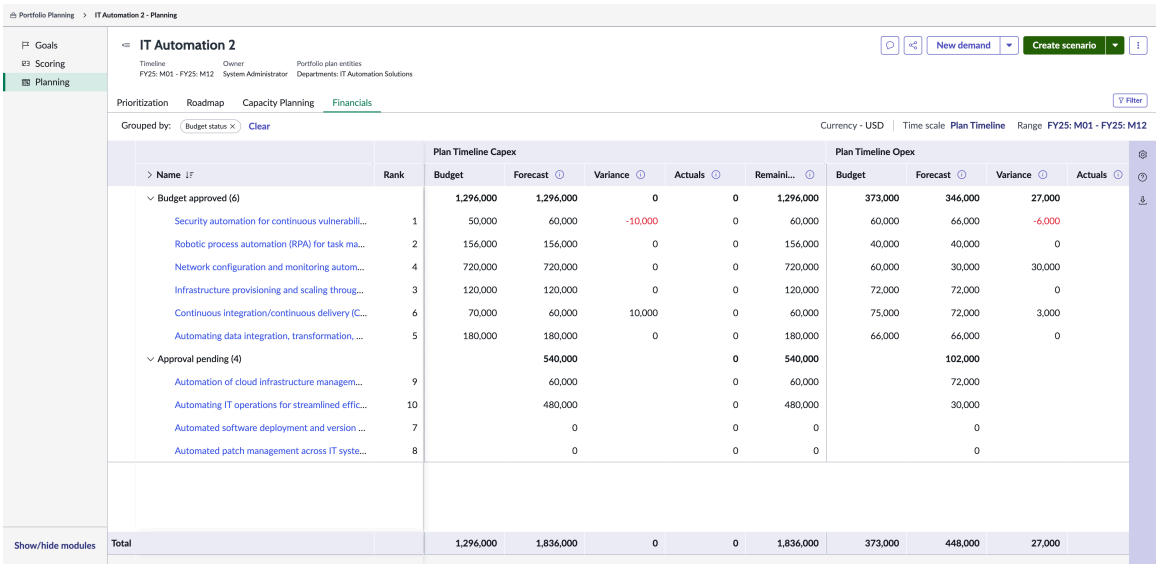
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- View the financials based on the expense type or cost type depending on the budget attribute configuration.
- Avoid overspending on planning items by comparing the approved budget with the latest forecast and actuals.

Important:
New and existing customers need to configure the portfolio financials to view the financials of your planning items at portfolio level. For more information, see Configure portfolio financials in Strategic Planning.

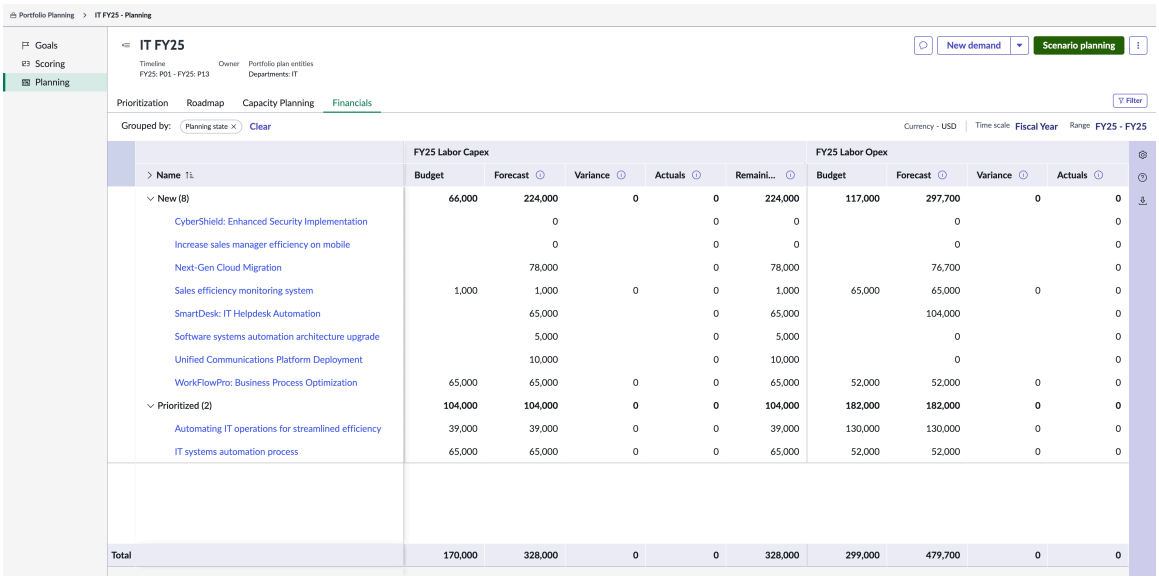
The portfolio financials view supports Demands, Epics, and Projects with Fiscal Calendar type configuration only.

Portfolio financials grouped by Budget status with expense type as the budget attribute



Name	Rank	Plan Timeline Capex Budget	Forecast	Variance	Actuals	Remaini...	Plan Timeline Opex Budget	Forecast	Variance	Actuals
Budget approved (6)		1,296,000	1,296,000	0	0	1,296,000	373,000	346,000	27,000	
Security automation for continuous vulnerabili...	1	50,000	60,000	-10,000	0	60,000	60,000	66,000	-6,000	
Robotic process automation (RPA) for task ma...	2	156,000	156,000	0	0	156,000	40,000	40,000	0	
Network configuration and monitoring autom...	4	720,000	720,000	0	0	720,000	60,000	30,000	30,000	
Infrastructure provisioning and scaling throug...	3	120,000	120,000	0	0	120,000	72,000	72,000	0	
Continuous integration/continuous delivery (C...	6	70,000	60,000	10,000	0	60,000	75,000	72,000	3,000	
Automating data integration, transformation, ...	5	180,000	180,000	0	0	180,000	66,000	66,000	0	
Approval pending (4)			540,000		0	540,000		102,000		
Automation of cloud infrastructure managem...	9		60,000		0	60,000		72,000		
Automating IT operations for streamlined effic...	10		480,000		0	480,000		30,000		
Automated software deployment and version ...	7		0		0	0		0		
Automated patch management across IT syste...	8		0		0	0		0		
Total		1,296,000	1,836,000	0	0	1,836,000	373,000	448,000	27,000	

Portfolio financials grouped by Planning status with cost type as the budget attribute



Name	FY25 Labor Capex Budget	Forecast	Variance	Actuals	Remaini...	FY25 Labor Opex Budget	Forecast	Variance	Actuals
New (8)	66,000	224,000	0	0	224,000	117,000	297,700	0	0
CyberShield: Enhanced Security Implementation		0		0	0		0		0
Increase sales manager efficiency on mobile		0		0	0		0		0
Next-Gen Cloud Migration		78,000		0	78,000		76,700		0
Sales efficiency monitoring system	1,000	1,000	0	0	1,000	65,000	65,000	0	0
SmartDesk: IT Helpdesk Automation		65,000		0	65,000		104,000		0
Software systems automation architecture upgrade		5,000		0	5,000		0		0
Unified Communications Platform Deployment		10,000		0	10,000		0		0
WorkFlowPro: Business Process Optimization	65,000	65,000	0	0	65,000	52,000	52,000	0	0
Prioritized (2)	104,000	104,000	0	0	104,000	182,000	182,000	0	0
Automating IT operations for streamlined efficiency	39,000	39,000	0	0	39,000	130,000	130,000	0	0
IT systems automation process	65,000	65,000	0	0	65,000	52,000	52,000	0	0
Total	170,000	328,000	0	0	328,000	299,000	479,700	0	0

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Note:
Group header row displays the rolled up values for Budget, Forecast, Variance, Actuals, and Remaining estimate of all the planning items in the group.

The default view of portfolio financials is set to display the planning items grouped by their budget approval status. Budget approved grouping lists the planning items which have the budget allocated and approved. Approval pending grouping lists the planning items which do not have any budget or if the requested budget is not approved.

Note:
Portfolio financials view is not yet compatible with Investment Funding. This view may not show the right budget values allocated to planning items from Investment Funding application. This will be add as a future enhancement.

In the left-grid, planning item details such as name, rank, planning state, planning item type, approved start date, total planned cost, total actual costs, total planned benefits and ROI for the full planning item duration.

In the right-grid, financial attributes of the planning items such as, Budget, Forecast, Variance, Actuals, and Remaining Estimates for Capex, Opex, Total, and Benefits portfolio for the portfolio timeline or breakdowns by year, quarter, month, or period.

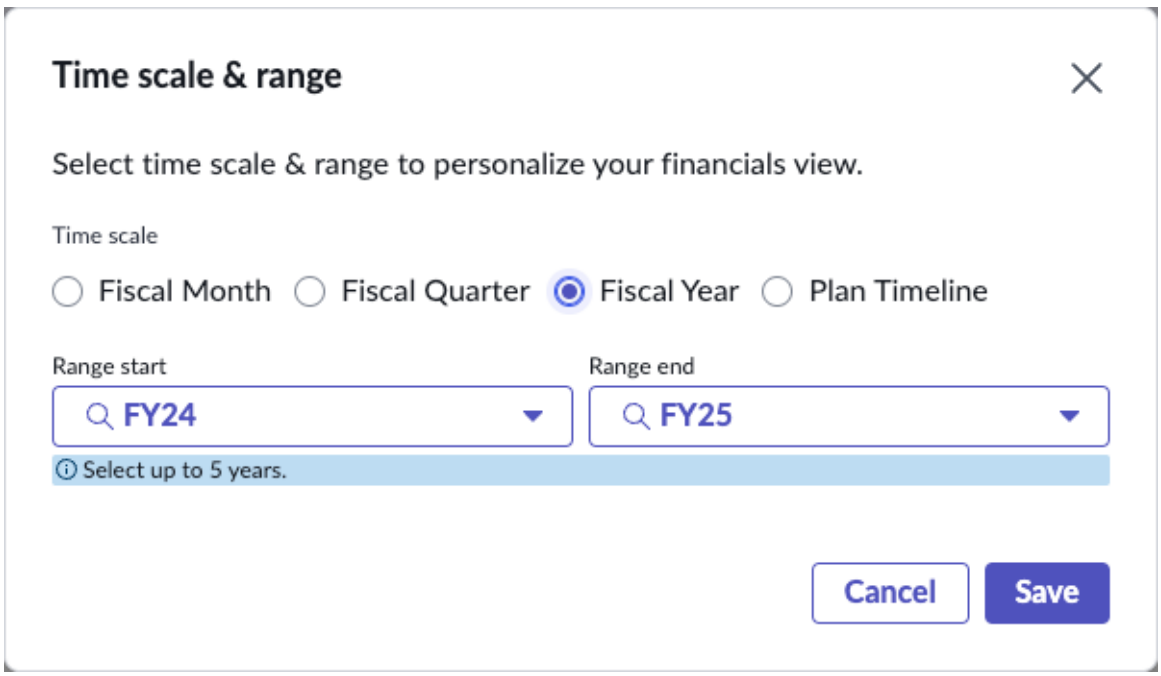
Tip:
You can select the name of a planning item from the left-grid to directly access the financials record page of that planning item.

You can export the portfolio financials details to Excel or CSV using the **Export** option ( ).

Customize your financials view

Customize the portfolio financials to view and access the required parameters helping you in better planning your portfolio and planning items.

- You can get a more detailed and granular view of the financials at monthly, quarterly, and yearly view by defining Timescale and Range. Use time scale to select a fiscal period and filter the range within the time scale to view the financials for any specific months, quarters, or years.



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Time scale and range parameters

Time scale	Description and range
Fiscal Month	Portfolio financials view by monthly breakdown. You can select up to 12 months.
Fiscal Quarter	Portfolio financials view by quarterly breakdown. You can select up to 4 quarters.
Fiscal Year	Portfolio financials view by yearly breakdown. You can select up to 5 years period.
Plan Timeline	Portfolio financial breakdown for the entire portfolio timeline.

- Personalize grouping and columns in the grids.

  Configure the columns and groupings in the right-grid using Personalize option ( ) to build a custom view.



For example, if you want to compare budget and actuals breakdowns, select only these two options and apply your preferences. You can also customize the left-grid by selecting the required columns from the **Left Grid** list from the personalize settings.

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- Group the planning items.

  By default, the financials view is grouped by the Budget status column. You can remove Budget status grouping from the Grouped by row and drag-drop the required header to change this view.

Docs for planning items in Strategic Planning

Store and manage all kinds of documentation for planning items from a centralized location of Strategic Planning Workspace.

Docs overview

Product and portfolio managers can store information for planning items using the Docs feature.

- Each planning item can have a separate doc to capture the information related to it.

  For example, for an Epic, you create Docs for high level business objectives or technical product requirements.

- Each planning item can have multiple Docs associated to it and each Doc can have multiple pages to help you effectively organize key artifacts.
- Predefined templates such as Project Brief, Product Requirements, Brainstorming Ideas, and Meeting notes are available. Create pages for your Doc using one of these templates or start with a blank page.

Features of Docs

The following are the key features of Docs:

- Auto-save content.
- See who is viewing or working on a Doc using the feature of live user presence.
- Create documents using pre-defined templates.
- Use rich text paragraph formatting, which includes headings, lists, alignment, and others.
- Move text blocks to change their placement using block-level editing.
- Tag team members inline or insert tables using the **/** command.
- Add reference to other ServiceNow AI Platform tables to connect work across teams.
- Insert images by uploading files or using web URLs.

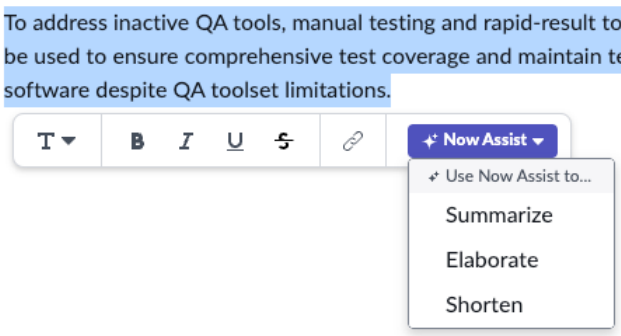
> **Note:**
> The experience of inserting Google Images links might not work.

Summarize Docs content using Now Assist for SPM

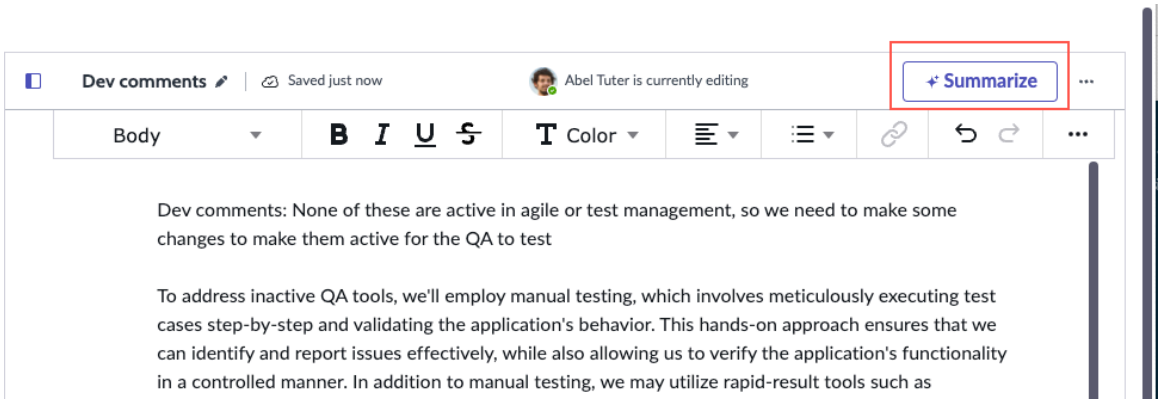
Use Now Assist capabilities to elaborate, shorten, and summarize selected content in Docs, or to get a summary of the whole document.

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- Summarize, elaborate, or shorten selected text.



- Summarize the entire content on the page.



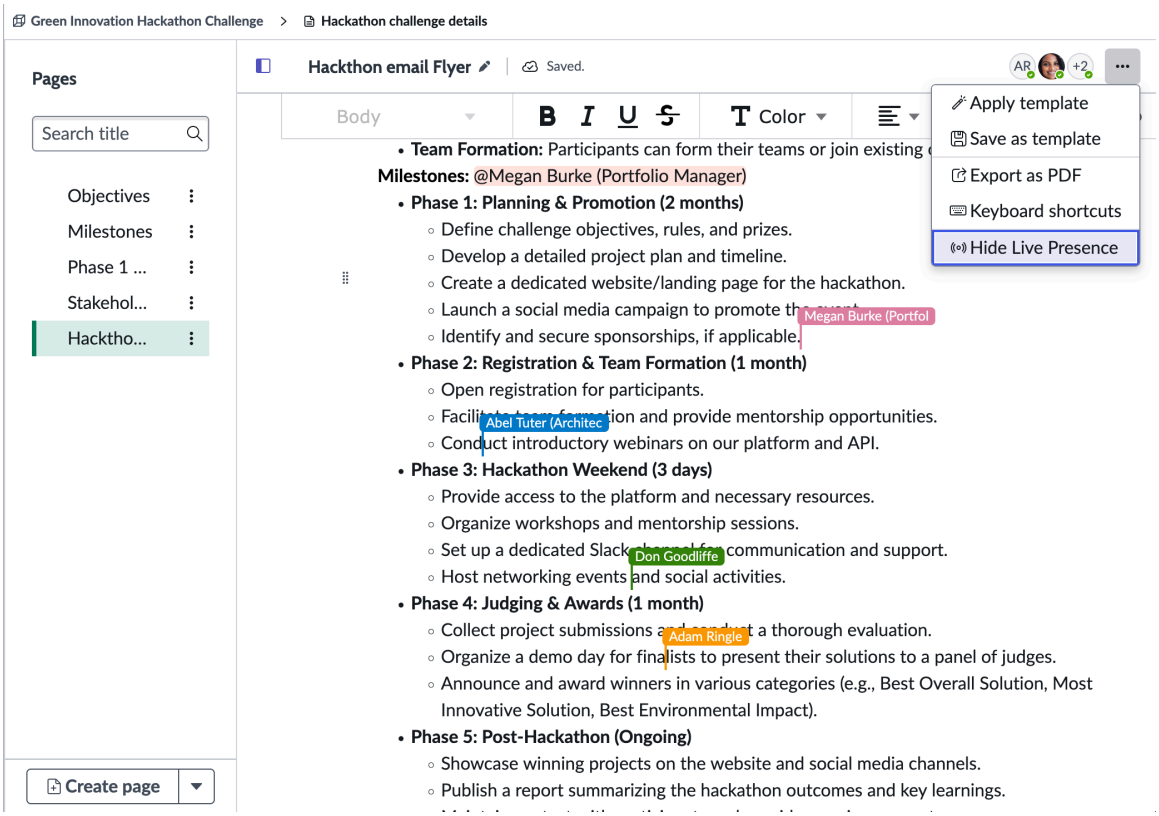
Note:

- Now Assist for Docs requires an SPM Pro + license. For more information, see Configure Now Assist for Strategic Portfolio Management (SPM).
- If there is more content to summarize, you can remove some content and retry.
- Because the information in these fields is AI generated, it's a good idea to review the text and make sure it's accurate.

Real-time collaboration within planning item Docs

With the feature of real-time collaboration, edit a Doc page concurrently with multiple other editors. Colored cursors denote the current location of each editor on the page. You can choose to show or hide these live presence indicators based on your preference while working on or reviewing the content of the page.

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Note:
Huge number of users editing the same block of content simultaneously might result in issues with application performance.

Create and manage pages and subpages for planning items

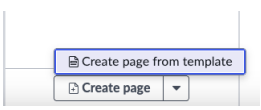
Flexibly organize information for your planning items by creating, duplicating, and deleting pages and subpages in Strategic Planning.

Before you begin

Role required: sn_align_core.apw_user

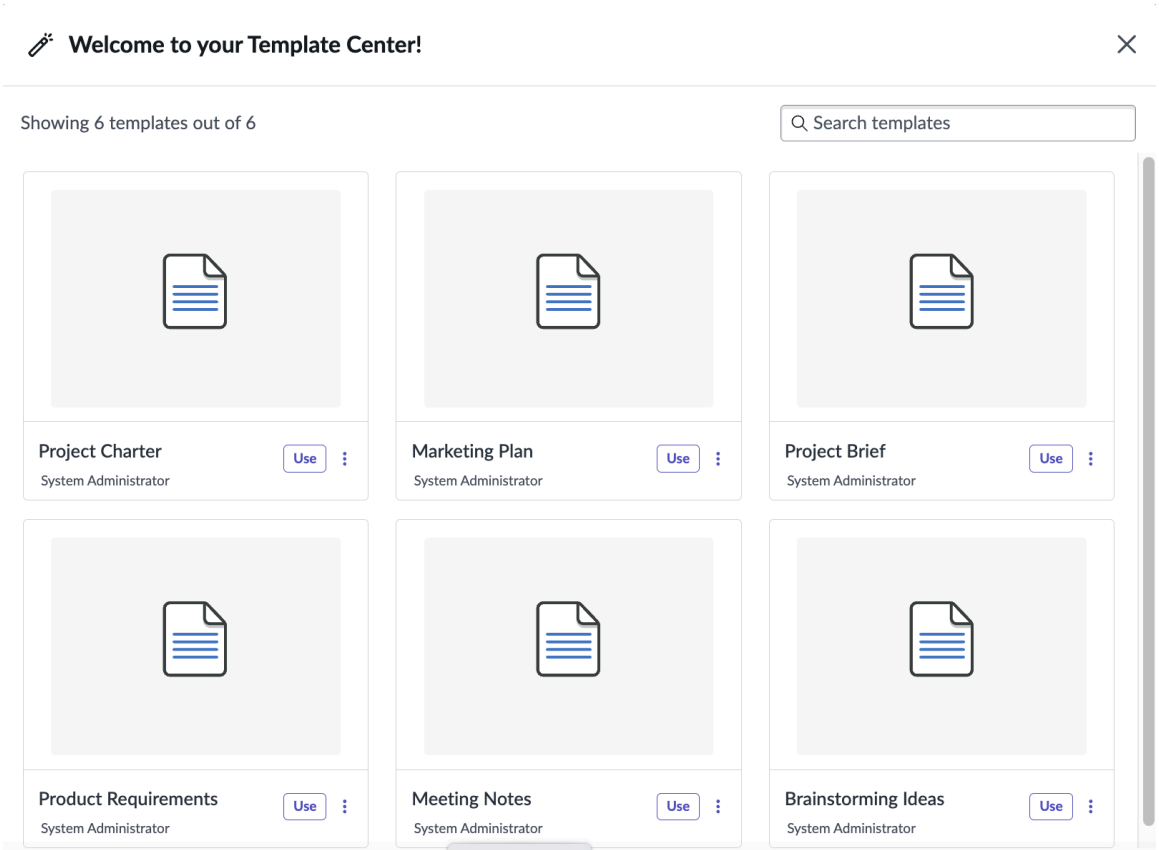
Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one and then select **Planning**.
3. From the Prioritization or Roadmap page, select a planning item that you would like to create a doc page for.
   If you have selected a planning item from the Roadmap page, select **Full details** from the **Details** tab of the item's side panel.
4. From the planning item's record page, select **Docs**.
5. To create a page, you can create a blank page or start with a predefined template.
   - For a blank page, select **Create page**.
   - To create from templates:
     a. Select **Create Page from template**.



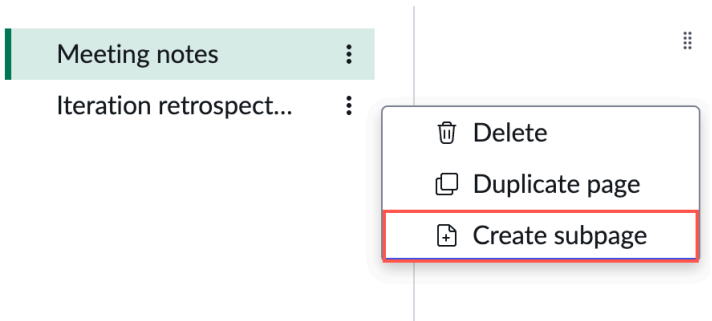
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b. Select a template from the Template Center and select **Create page**.



The new page is created and added to your Doc with the name **Untitled**, which you can rename.

6. To create a subpage, select the **Page Actions** menu (⋮) and select **Create Subpage**.



7. To delete a page or a subpage, select the **Page Actions** menu (⋮) and select **Delete**.

Managing portfolio plan views in Strategic Planning Workspace

Portfolio managers can create customized views for their portfolio plans by applying personalization settings such as column selection, grouping, and filtering. Portfolio owners or editors can share these personalized views with stakeholders to enable easier collaboration on the portfolio plans.

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Benefits of portfolio plan views

Portfolio managers can create personalized views as needed by applying settings such as column selection, grouping, and filtering.

- Views can be created as private or public.
- Can create up to three private views and up to 10 shared (public) views.
- Portfolio plan views can be shared with stakeholders to enable collaboration on the portfolio plan.
- Switch between shared and private views as needed.
- Each view saves your display preferences across the Prioritization, Roadmap, Capacity, and Financials tabs.

Note:
Views are available only for the Planning module and are supported in live mode, but not in scenario mode.

Create a portfolio plan view in Strategic Planning

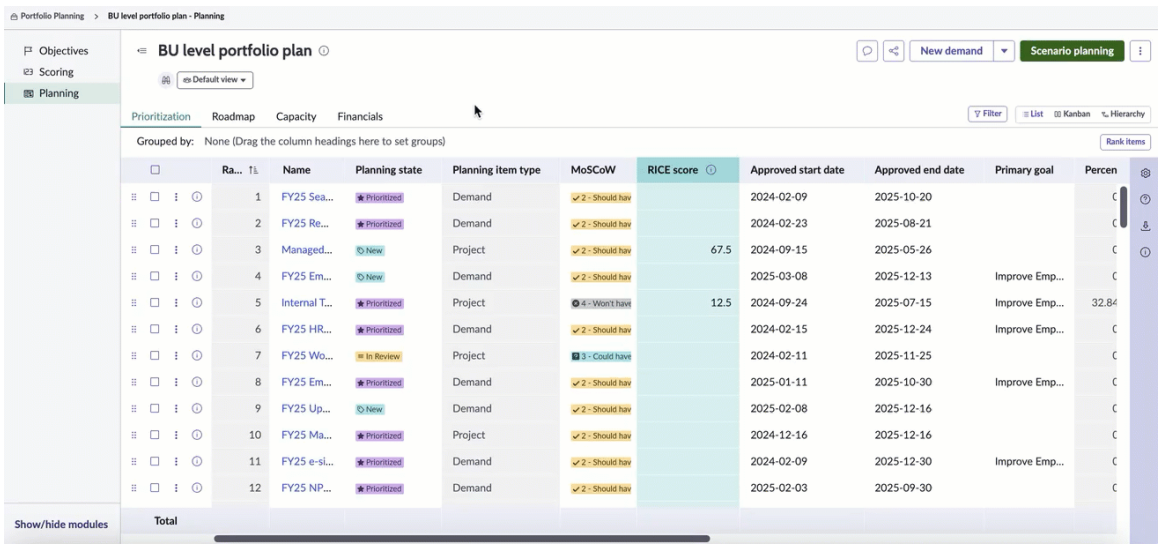
Create a customized portfolio plan view based on your requirements, so you can access it when you log in again and share it with stakeholders for collaboration.

Before you begin
Role required: sn_align_core.ap_read_only

About this task
You can create up to three private views and up to ten shared (public) views per portfolio plan.

Procedure
1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one.
3. Make any changes to the view as needed.
   For example, apply filter with the **Department** attribute and the value as **Finance**.

   The **Save as new view** option appears on the portfolio plan header.



4. From the portfolio plan header, select **Save as new view**.
5. On the Save as new view window, fill the details.

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a. Enter a name for the view in the **View name** field.

b. **Optional:** Select the **Shared view** toggle to make this view public.
Selecting the **Shared view** toggle makes the view visible to all stakeholders with whom this portfolio plan is shared.

c. Select **Save**.

Result
The shared view for the portfolio plan is created and will be visible to all stakeholders with whom this portfolio plan is shared.

What to do next
- Share the portfolio plan with your stakeholders to start collaborating on the portfolio plan. See Share a portfolio plan in Strategic Planning.
- Edit a portfolio plan view to make any changes to the existing view. See Edit a portfolio plan view in Strategic Planning.

Edit a portfolio plan view in Strategic Planning

Edit a customized portfolio plan view based on your requirements, so you can access it when you log in again and share it with stakeholders for collaboration.

Before you begin
Role required: sn_align_core.ap_read_only

About this task
- Only the owner of a portfolio plan view can edit a shared (public) view.
- You can have up to three private views and up to ten shared (public) views per portfolio plan.

Procedure
1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one.
3. From the portfolio plan header, select the view you want to edit or override with your personalization settings from the list of available portfolio plan views.
The selected view appears.
4. Make changes to the view as needed.
For example, apply filter with the **Department** attribute and the value as **Finance**.

   After you make any change to the view, the Save view option appears in the portfolio plan header.

5. Select **Save view**.
The view is updated to reflect the changes made.
6. **Optional:** To edit name of the view, select the Portfolio plan view drop-down from the portfolio plan header and then select Edit view icon ( ) next to the view you want to edit the name for.
On the Edit view window, fill the details.

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a. Update the name for the view in the **View name** field as required.

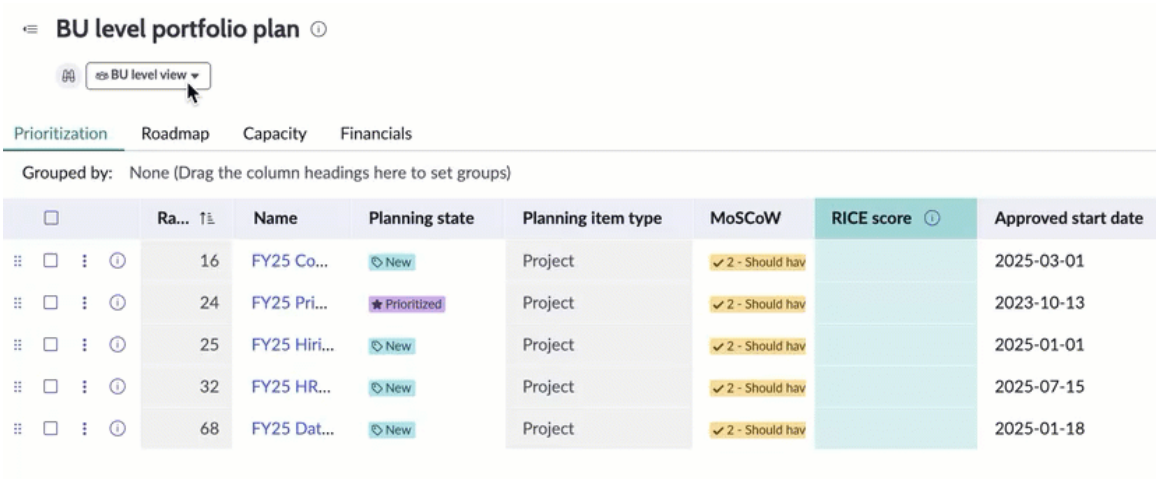
> **Note:**
> Only the owner of the portfolio plan view can rename the view.

b. **Optional:** Select the **Shared view** toggle to make this view public or disable the **Shared view** toggle to make the view private.

> **Important:**
> Changing a shared view to a private view removes access for existing stakeholders.

c. Select **Save**.

(Optional) The name of the view is updated.



What to do next

Share the portfolio plan with your stakeholders to start collaborating on the portfolio plan. See Share a portfolio plan in Strategic Planning.

Related topics

Create a portfolio plan view in Strategic Planning

Delete a portfolio plan view in Strategic Planning

Delete a portfolio plan view in Strategic Planning

Delete a customized portfolio plan view if it is no longer needed or if the maximum limit of ten shared or three private views has been reached.

Before you begin

Role required: sn_align_core.ap_read_only

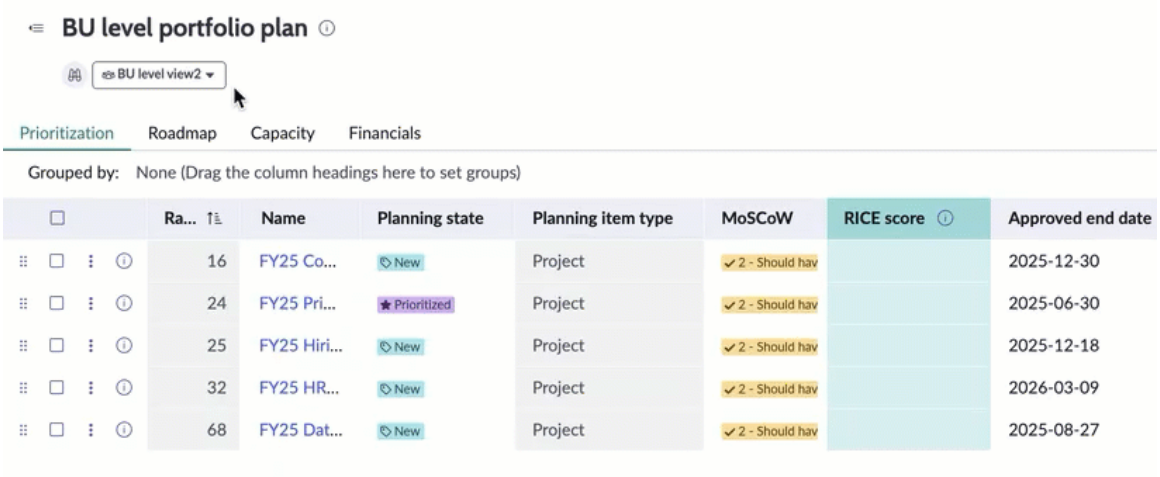
About this task

- Only the owner of the portfolio plan view or an editor of the portfolio plan can delete the view.
- Deleting a portfolio plan deletes the view, including any changes made to the view. However, this action keeps the items (projects, demands, epics) intact in the portfolio plan.
- You can have up to three private views and up to ten shared (public) views per portfolio plan.

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Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. From the list of portfolio plans, select one.
3. Select the Portfolio plan view drop-down from the portfolio plan header and then select Delete view icon ( ) next to the view you want to delete.
   The Delete this view window appears.
4. On the Delete this view window, select **Delete**.



Related topics

- Create a portfolio plan view in Strategic Planning
- Edit a portfolio plan view in Strategic Planning

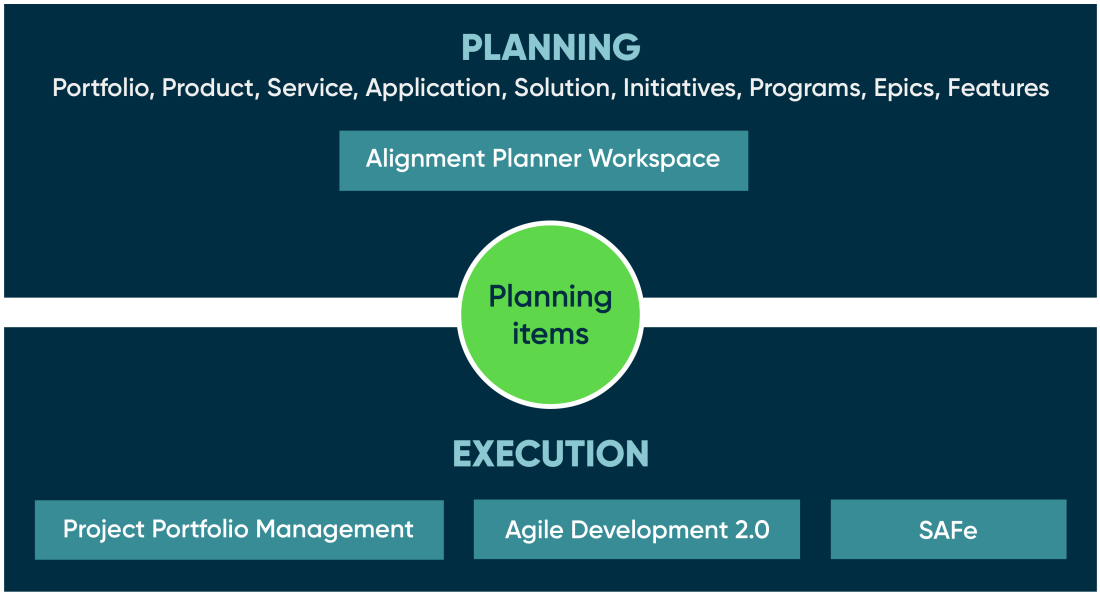
Executing Strategic Planning work in PPM, Agile 2.0, and SAFe

Facilitate execution of the work planned in Strategic Planning in ServiceNow applications such as Project Portfolio Management (PPM), Agile Development 2.0, or Scaled Agile Framework (SAFe).

Import, export, and manage your planning items between Strategic Planning and PPM, Agile 2.0, and SAFe.

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Integrating planning and execution systems



Import records to Strategic Planning

Import records from Agile Development 2.0, after the relevant table maps, fields maps, and choice maps are configured.

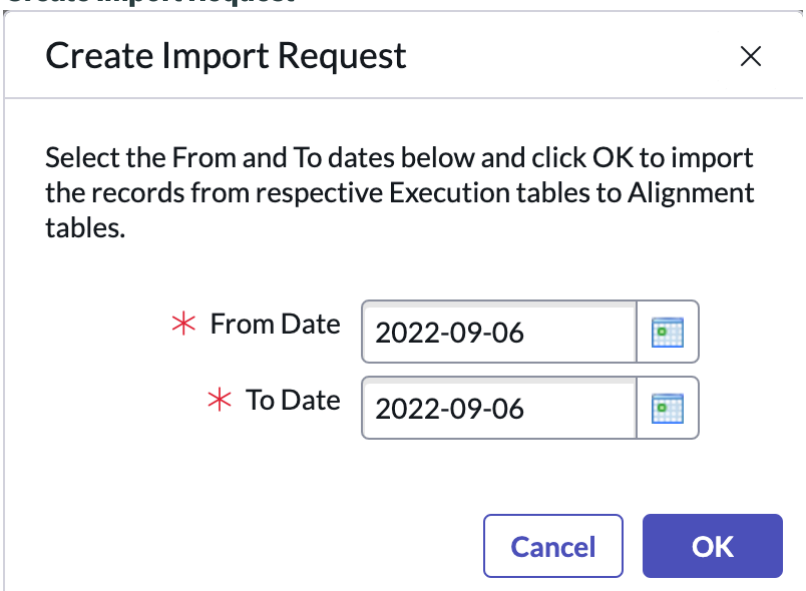
Before you begin

Role required: sn_align_core.apw_admin

Procedure

1. Navigate to **All** > **Strategic Planning** > **Integrations**.
2. Select **ServiceNow Internal** Alignment Integration type.
3. Click **Import**.
4. On the Create Import Request form, fill in the date range for importing the records.

Create Import Request



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5. Select **OK**.

Note:
Records that have been created within the specified dates will be imported.

Result
An import request is created and a link is shared to track the progress of the request.

Note:
If you want to import records for a specific table map, click the **Import** button that is available for the respective table map.

View error logs

View error logs to understand the cause of any issues that might have occurred during the integration process.

Before you begin
Role required: sn_align_core.apw_admin

Procedure

1. Navigate to **All** > **Strategic Planning** > **Integrations**.
2. To view the error logs, select the **Integrations Errors** tab.

Export the portfolio plan status or roadmap to Microsoft PowerPoint

Export the status of goals, work items, roadmap, and key metrics of your portfolio plan and free-form roadmap into a Microsoft PowerPoint file so that you can keep your business stakeholders updated on the progress. Save time by avoiding copying data into reports and drive shared outcomes by enabling collaboration even with stakeholders who can't access your ServiceNow instance.

Before you begin
Install Export to PowerPoint for Strategic Portfolio Management.

Important:
Export to PowerPoint is currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. Please check for availability updates in future releases.

Role required: admin

About this task
https://player.vimeo.com/video/1004219064?h=242c60b94c&badge=0&autopause=0&player_id=0&app_id=58479

The following three PowerPoint templates are provided by default to generate a status report for your portfolio plan:

- Portfolio plan status: Contains individual detailed slides for the top five items prioritized by rank.
- Portfolio plan & goals status: Contains slides for Goals and targets for this portfolio, achieved goals, goals at risk, and individual detailed slides for the top five items prioritized by rank.
- Roadmap Template - default: Contains slides for Roadmap for this portfolio. You can export roadmap data for maximum period of a year at a time.

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You can customize the type of the data to be shown in the generated report by updating a predefined template or by creating your own branded template. See Create a Microsoft PowerPoint template.

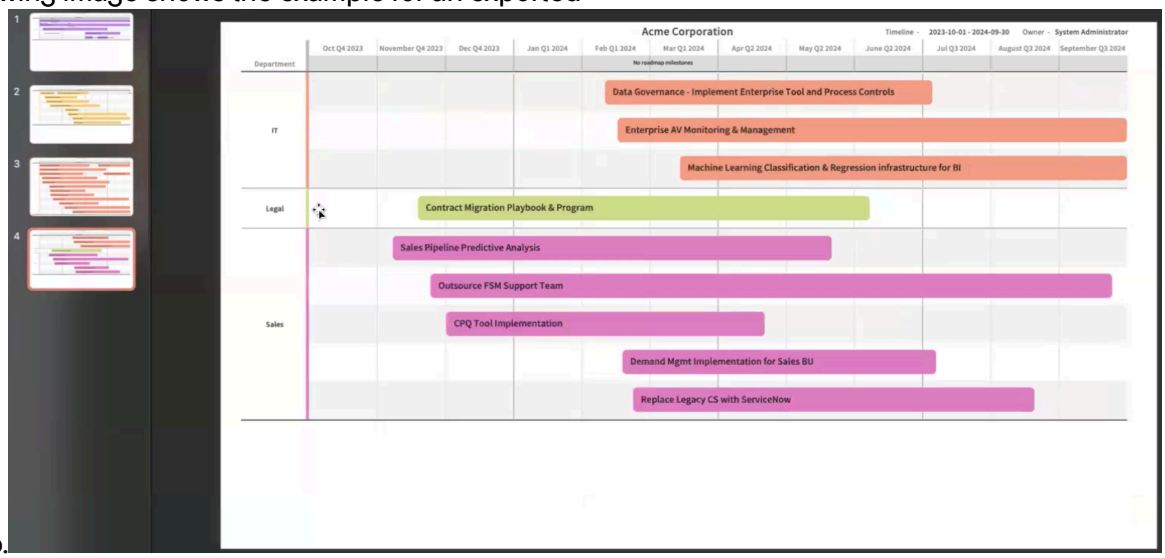
Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Portfolio Planning**.
2. Export the status of goals, work items, roadmap, and key metrics of your portfolio plan and free-form roadmap into a Microsoft PowerPoint file.

Result

A PowerPoint file is generated with the relevant data.

The following image shows the example for an exported roadmap.



Strategic Planning Workspace reference

Reference information to provide additional details about Strategic Planning such as the fields, user roles, tables, guidelines, and domain separation information.

Customizing milestones display on roadmap in Strategic Planning Workspace

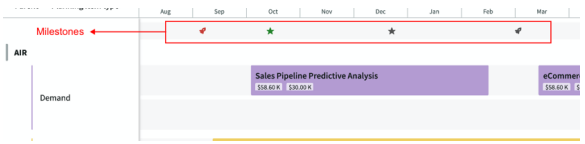
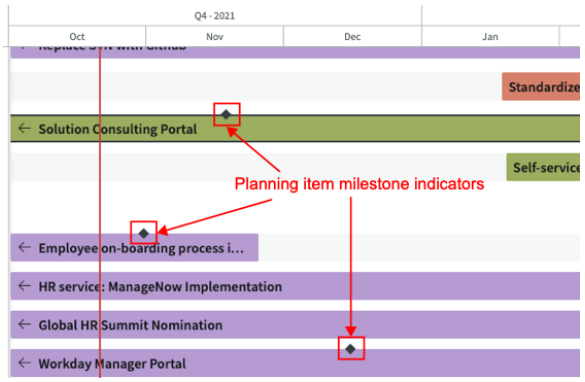
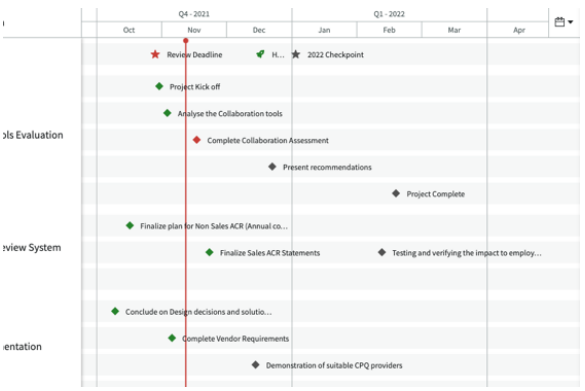
Easily track the milestones of your roadmap timeline or its planning items by choosing how the milestones are displayed on the roadmap view.

The Personalize ( ) side panel on the roadmap provides different toggles to personalize the display of milestones on your roadmap.

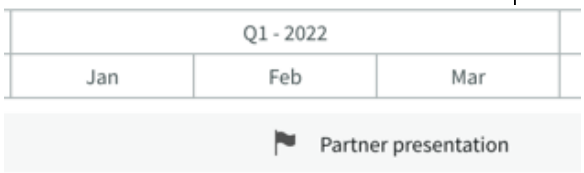
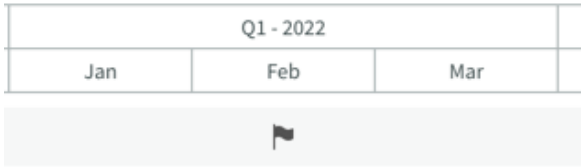
- For portfolio plan roadmaps, these toggles are always available.
- For free-form roadmaps, these toggles are available only if the roadmap's source table is the Planning Item table [sn_align_core_planning_item] or one of its extensions.

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Milestones toggle	Roadmap view
Roadmap milestones Shows the milestones of the roadmap timeline.	
Item milestones Shows the milestones of the planning items.	
Only milestones Shows just the milestones on the roadmap by hiding all the planning item bars. When you select this toggle, the group by and color by fields are changed and made inactive. Your previous personalization settings are available when you turn off this toggle. You can also see that the milestone indicators are colored in this view. • Red: Missed • Green: Achieved • Black/Dark gray: Upcoming	

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Milestones toggle	Roadmap view
Note: If the total number of item-level milestones, including the milestones for unscheduled items, exceeds 100, the item milestone indicators aren't visible on the roadmap. You can work with your admin to change this number to a value of your preference. For more information, see Update the display limit of items on Prioritization and Roadmap.	
Milestone label Shows the milestone labels.	**Milestone indicator with label**  **Milestone indicator without label** 

Customizing the dependencies display on the roadmap in Strategic Planning Workspace

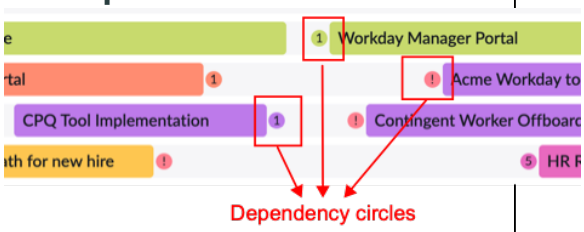
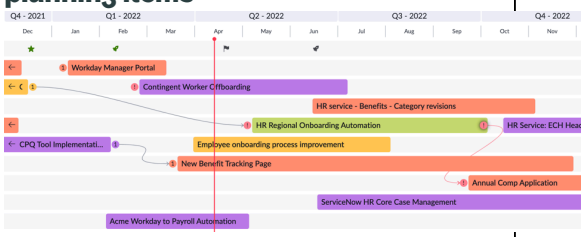
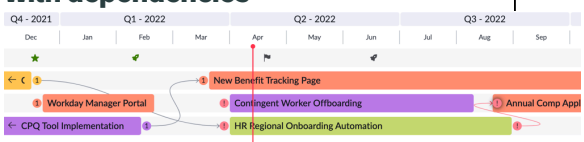
Improve the efficiency of identifying the relationships between your planning items by choosing how the dependencies are displayed on the roadmap view.

The Personalize ( ) side panel on the roadmap provides different toggles to personalize the display of dependencies on your roadmap.

- For portfolio plan roadmaps, these toggles are always available.
- For free-form roadmaps, these toggles are available only if the roadmap's source table is the Planning Item table [sn_align_core_planning_item] or one of its extensions.



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Dependencies Toggle	Roadmap view
View dependencies Indicates dependencies in the form of circles on either side of the planning item bars. These circles either contain a number inside them (1), indicating the number of dependencies that item shares, or is colored red (!) indicating a conflicting dependency. **Note:** This toggle must be enabled to use the other two toggles in the Dependencies section.	**Dependency circles on the roadmap** 
Dependency lines Indicates dependencies using lines between the planning items. These lines are shown only if: • Both planning items of the dependency are within the same roadmap • Dependency is of the **Depends on** type	**Dependency lines between the planning items** 
Only items with dependencies Filters the roadmap to show only those planning items that have that have at-least one **Depends on** type of relationship. The items shown here can depend on items on or out of the current roadmap.	**Roadmap showing only items with dependencies** 

Components installed with Strategic Planning Workspace

Several types of components are installed with installation of the Strategic Planning application, such as user roles, tables, scheduled jobs, system properties, and custom scripts.

Note:
The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

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Roles installed with Strategic Planning Workspace

Strategic planning workspace roles

Role title [name]	Description	Contains roles
Strategic Planning Workspace admin [sn_align_core.apw_admin]	Can access all the features in the Strategic Planning application. **Note:** Goals and Capacity Planning can be accessed only with the sn_apw_advanced.spw_goal_user_read and sn_align_ws.spw_capacity_read roles respectively.	• it_portfolio_manager • sn_align_core.apw_user • sn_gf.goal_admin • view_changer
Strategic Planning Workspace user [sn_align_core.apw_user]	Can create, update, and delete portfolio plans, free-form roadmaps, and planning items. This role can be given to users such as portfolio or product managers, business unit leads, and other planning personas.	• sn_align_cmn_int.user • sn_milestones.milestone_e • sn_gf.strategy_planner • sn_gf.goal_user • sn_align_core.ap_read_onl • model_manager
sn_align_core.ap_read_only	• Can view portfolio plans (Planning and Scoring pages) and free-form roadmaps that are shared with them. • Can add notes, comments, or attachments to portfolio plans and roadmaps that are shared with them. • Can create, edit, and delete portfolio plan views and free-form roadmap views. **Note:** Only the owner can edit or delete a portfolio plan view or a free-form roadmap view.	• sn_milestones.milestone_v • sn_dpr_model.product_enh • sn_dpr_model.product_fea
Milestones editor [sn_milestones.milestone_editor]	Can create, update, and delete milestones on the roadmap.	sn_milestones.milestone_vie
Milestones viewer [sn_milestones.milestone_viewer]	Can view milestones on the roadmap.	None
Business stakeholder [business_stakeholder]	• Can create and update portfolio plans and free-form roadmaps. • Can add notes, comments, or attachments to portfolio plans and roadmaps that are shared with them.	• sn_align_core.ap_read_onl • sn_align_ws.spw_capacity_ • sn_apw_advanced.spw_goa

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Strategic planning workspace roles (continued)

Role title [name]	Description	Contains roles
	• Can personalize the roadmaps. • Can view generated resource capacity for planning items in the Capacity Planning screen. • Can view goals defined for the portfolio plan. **Note:** Users with this role do not have access to create or edit any roadmap items.	

Scenario planning roles

Role title [name]	Description	Contains roles
sn_align_ws.scenario_approver	Can approve the scenarios for the portfolio.	sn_align_core.apw_user

Goals roles

Role title [name]	Description	Contains roles
sn_gf.goal_user_read	Can view the goals. This role can be given to users such as the project user and demand user.	None

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Goals roles (continued)

Role title [name]	Description	Contains roles
sn_gf.goal_user	• Can create, view, edit, and delete goals, subgoals, and associated targets. **Note:** ○ A goal or sub-goal can be deleted only by the owner and contributors of the goal or its immediate parent goal when the **sn_gf.allow_goal_deletion** system property is set to **Yes**. ○ An associated target can be deleted only by the owner and contributors of the target or its goal when the **sn_gf.allow_goal_deletion** system property is set to **Yes**. ○ A goal can be edited only by the owner and contributors of the goal or its immediate parent goal. ○ A target can be edited only by the owner and contributors of the target or its goal. • Can remove the existing goal relationships between work item and goal, from the Goal Relationship [sn_gf_goal_m2m_relationship] table.	sn_gf.goal_user_read
sn_gf.goal_admin	• Create goals and targets. • Edit goals and targets created by other users. • Edit target breakdowns.	• sn_gf.goal_user_read • sn_gf.goal_user

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Goals roles (continued)

Role title [name]	Description	Contains roles
	Note: The user must also be assigned the sn_apw_advanced.spw_goal_user role to edit target breakdowns. • Can update the goal preferences. • Can create target sources and context variables as part of enabling the target automation feature. **Note:** The sn_gf.goal_admin role is installed as part of Goal Framework installation but this privilege is added to the role when Goal Framework for SPM is installed.	
sn_gf.strategy_planner_read	Can view all strategic plans and strategic values.	None
sn_gf.strategy_planner	Can create, view, edit, and delete strategic plans and strategic values. **Note:** • A strategic plan can be edited only by the owner and sponsor of the strategic plan. • A strategic value can be edited only by the sponsor of the strategic plan.	sn_gf.strategy_planner_read
sn_gf.epmo_strategy_planner	Can create, view, edit, and delete any goal.	• sn_gf.goal_user_read • sn_gf.goal_user • sn_gf.goal_admin • sn_gf.strategy_planner

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Goals roles (continued)

Role title [name]	Description	Contains roles
sn_apw_advanced.spw_goal_user	Can view the Goals page in the Strategic Planning Workspace and edit goals and targets.	• sn_apw_advanced.spw_goal_user_read • sn_gf.goal_user
sn_apw_advanced.spw_goal_user_read	Can view the Goals page in the Strategic Planning Workspace.	sn_gf.goal_user_read

Alignment Planner Workspace with PPM, Agile 2.0, and SAFe roles

Role title [name]	Description	Contains roles
Strategic Planning integrations user [sn_align_cmn_int.user]	Imports, exports, and manages planning items between Strategic Planning and Agile, SAFe, and PPM.	connection_admin

Capacity roles

Role title [name]	Description	Contains roles
sn_align_ws.spw_capacity_user	Can generate resource capacity details.	sn_align_ws.spw_capacity_read
sn_align_ws.spw_capacity_read	Can view resource capacity details.	None

Financial planning roles

Role title [name]	Description	Contains roles
sn_align_ws.spw_financial_user	• Can view financials, create cost plans and expense lines, create and compare financial baselines for planning items. • Can create, edit, and view financial values in scenario planning.	None
sn_align_ws.spw_funding_user	Can view the financial widgets while comparing scenarios and approve a scenario with financial changes.	sn_align_ws.spw_financial_user

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Tables installed with Strategic Planning Workspace

Table	Description
Custom planning item 1 [sn_align_core_custom_planning_item_1]	Stores information for a additional planning item type.
Custom planning item 2 [sn_align_core_custom_planning_item_2]	Stores information for a additional planning item type.
Custom planning item 3 [sn_align_core_custom_planning_item_3]	Stores information for a additional planning item type.
Custom planning item 3 [sn_align_core_custom_planning_item_3]	Stores information for a additional planning item type.
Custom planning item 4 [sn_align_core_custom_planning_item_4]	Stores information for a additional planning item type.
Custom planning item 5 [sn_align_core_custom_planning_item_5]	Stores information for a additional planning item type.
Demand [sn_align_core_demand]	Stores records created with Demand planning item type.
Epic [sn_align_core_scrum_epic]	Stores records created with Epic planning item type. These records could be Scrum or SAFe epics.
Initiative [sn_align_core_initiative]	Stores records created with Initiative item.
Lens [sn_align_core_lens]	Stores data of the lens configuration.
Lens structure [sn_align_core_lens_structure]	Stores data of lens entities and the relationship between them for different lenses.
Milestone [sn_milestones_milestone]	Stores data of milestones.
Planning Item [sn_align_core_planning_item]	Stores the data of all planning item types.
Portfolio plan	Stores data of portfolio plans.

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Table	Description
[sn_align_ws_portfolio_plan]	
Project [sn_align_core_project]	Stores records created with Project planning item type.
Roadmap configuration [sn_align_ws_roadmap_configuration]	Stores the configuration data for tables that are used to create portfolio roadmaps and free-form roadmaps.
Strategic Program [sn_align_core_program]	Stores records created with Strategic Program item.

Goals tables

Table	Description
Context Variable [sn_gfa_context_variable]	Stores the context variable details for the target source.
Goal [sn_gf_goal]	Stores the goal details.
Goal Assigned Entity Configuration [sn_gf_assigned_entity_config]	Store the assigned entity configuration for a table for an assigned entity type, so that the goal user can associate the goal with the required assigned entity.
Goal Core [sn_gf_core_goal]	Stores the core (basic) details for the goal. The Goal [sn_gf_goal] table extends the Goal Core [sn_gf_core_goal] table.
Goal Relationship [sn_gf_goal_m2m_relationship]	Defines the relationship between a goal and items (Project, Demand, Program, Scrum Epic, Scrum Feature, SAFe Epic, SAFe Feature, and Planning item).
Strategic Plan [sn_gf_strategic_plan]	Stores the strategic plans defined for each planning organization hierarchy.
Strategic Priority [sn_gf_strategy]	Stores the strategic priorities defined for the organization.
Strategy Value [sn_gf_strategy_value]	Stores the strategic values for strategic plans.
Target [sn_gf_goal_target]	Stores the target details for the goal.

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Goals tables (continued)

Table	Description
Target Breakdown [sn_gfa_target_breakdown]	Stores the target breakdown details for the target that were created based on the breakdown intervals specified for the target.
Target Progress [sn_gf_goal_target_progress]	Stores the target progress details for the goal.
Target Source [sn_gfa_target_source]	Stores the target source configuration details for automating the actual value of the targets.
Units [sn_gf_units]	Stores the available units for measuring the progress of targets.

Strategic Planning with PPM, Agile 2.0, and SAFe tables

Table	Description
Field Map [sn_align_cmn_int_field_map]	Field mappings for work items between Strategic Planning and the execution applications.
Alignment Integration [sn_align_cmn_int_integrations_setup]	Integration setup information for your instance.
Table Map [sn_align_cmn_int_table_map]	Table maps for work items between Strategic Planning and the execution applications.
Integration Mapping [sn_align_cmn_int_integration_mapping]	Integration mappings for work items between Strategic Planning and the execution applications.
Import Request [sn_align_cmn_int_import_request]	Stores the information for import requests created to import records from PPM, Agile Development 2.0, or SAFe to Strategic Planning.
Instance Mapping [sn_align_cmn_int_instance_mapping]	Stores instance mapping information between Strategic Planning and the execution applications.
Integration Error [sn_align_cmn_int_integration_error]	List of the integration errors.

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Strategic Planning with PPM, Agile 2.0, and SAFe tables (continued)

Table	Description
Choice Map [sn_align_cmn_int_choice_map]	Workflow choice mappings for work items between Strategic Planning and the execution applications.

Financials tables

Table	Description
Investment Baselines [sn_invst_pln_invst_investment_baseline]	Stores the information about the financial baselines.
Investment Baseline Headers [sn_invst_pln_invst_investment_baseline_header]	Stores all the information about financial baselines and the investment tables.
Investment Budget [sn_invst_pln_invst_budget]	Stores the migrated budget information to work on lean budgeting at required time scope.
Scenario item financial [sn_align_ws_scenario_item_financial]	Stores the updated budget value of planning items from scenario planning in simulation mode.
Scenario target [sn_align_ws_scenario_target]	Stores the portfolio-level target budget in scenario planning.

Scoring tables

Table	Description
Scoring Framework [sn_apw_advanced_scoring_framework]	Stores the records of scoring frameworks such as RICE, WSJF, Value vs Effort, or any new custom framework.
Scoring Framework Attribute [sn_apw_advanced_scoring_attributes]	Stores the attributes of each of the scoring frameworks such as Reach, Impact, Confidence, Effort, Value, Job Size, Time Criticality, and so on. These attributes are of Glide var type fields.

Digital Product Release Data Model tables

Table	Description
Product Enhancement	Stores the information about the product enhancement of a product feature.

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Digital Product Release Data Model tables (continued)

Table	Description
[sn_dpr_model_product_enhancement]	
Product Feature [sn_dpr_model_product_feature]	Stores the information about the function or capability that adds value to a product for the customer.

Scheduled jobs installed with Strategic Planning Workspace

Goals scheduled jobs

Scheduled job	Description
Migrate Goal, Strategy, and Work item data to the Goal Framework and related Planning item tables	Migrates the existing goals data to the Goal Framework tables. For information on what data is migrated and how the data can be migrated, see goal data migration.
Migrate goal relationships for assigned entities	Populates the fields, **Assigned entity type** and **Assigned entity** on the Goal form based on the data in the Goal Relationship [sn_gf_goal_m2m_relationship] table if you have created m2m relationship with lens entities other than **Company**, **Business Unit**, **Department**, and **Portfolio**.
Clear the Planning item value in the Goal Relationship for strategic items	Clears the planning item value in the existing Goal Relationship records for strategic items - Program and Initiative.
Update Actual value of the targets using Goal Framework for SPM	Updates the actual value of the targets by collecting the data from the respective target sources, so that the progress of the targets is updated and then the targets' progress is rolled up to the goals.
Create Goals Demo Data with Target Breakdowns	Creates a target breakdowns demo data for the targets.

Financials scheduled jobs

Scheduled job	Description
Create Financial Baseline For Planning Items	Automatically create financial baselines for your planning items at a defined cadence.
Migrate budget for active demands and projects	Migrate the budget of your planning items as a bulk action.
Generate Labor Costs	Activate scheduled jobs to automatically generate labor costs for attribute-based resource assignments for Projects and Demands.

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Financials scheduled jobs (continued)

Scheduled job	Description
Generate Labor Costs For Epic	Activate scheduled jobs to automatically generate labor costs for attribute-based resource assignments for Epics.

Custom scripts installed with Strategic Planning Workspace

Goals custom scripts

Name	Description
Benefit Plans A target source with predefined script.	Predefined script that updates the **Actual value** field on the target form by fetching the required value from the **Actual benefit** field or **Non-monetary actual benefit** field from the monetary or non-monetary benefit plan records. For script template, see Predefined target automation script for benefit plans. **Note:** You can use the Benefit Plans custom script only when PPM Standard (Project Portfolio Management) is installed.

System properties installed with Strategic Planning Workspace

Portfolio Planning and Portfolio Planning Core system properties

Name	Description
sn_align_ws.portfolio_plan_items_limit	Option to define the number of planning items to be loaded on the planning page. **Note:** If the value in the system property is more than 250, the performance of the UI may degrade. The default value is 250.
sn_align_ws.item_milestone_limit	Option to define the number of milestone items to be loaded in the Roadmap tab. The default value is 50.
sn_align_ws.is_scenario_planning_disabled	Option to enable the scenario_planning feature.
sn_align_core.planning_item_types_allow_list	Option to define the planning item types to be allowed for configured for a portfolio plan.

Goals system properties

Name	Description
glide.ui.sn_gf_goal_target_activity.fields	Option to enable activity stream for fields of the goals and targets.
sn_align_ws.goal_hierarchy.max_records	Specifies the number of goals to be loaded on the Hierarchy tab on the Goals view.

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Goals system properties (continued)

Name	Description
	Note: If the value in the system property is more than 500, the performance of the Goals UI may degrade. The default value is 500.
sn_gf.allow_goal_deletion	Option to enable deletion of goals. The default value is true.
sn_gf.allow_target_deletion	Option to enable deletion of targets. The default value is true.
sn_gf.goal_calendar_type	Option to set calender type for setting goals. The available calendar types are Gregorian Calendar and Fiscal Period. The default value is Gregorian Calendar.
sn_gf.weighted_average_enabled	Option to enable the weighted average logic to calculate the progress of goals from their subgoals and targets.
sn_gfa_disable_target_breakdown	Option to enable the target breakdowns feature at the instance level. The default value is false.
sn_gfa.target_breakdown_decimals	Option to define the number of decimals to show for target values while generating the target breakdowns. The default value is 2.
sn_gfa.weeklyCheckInDayToMapMonth	Option to define end day of the week for weekly target breakdowns mapping to month. The default value is Friday.

Strategic Planning with PPM system properties

Name	Description

com.sn_align_cmn_int.bulk_import	• Type: Choice list
	• Default value: INSERT
	• Other possible values:
	  ○ INSERT
	  ○ <Value 2 name>:
	• Location: System Property [sys_properties] table
	• Learn more: Configure bulk import

Domain separation and Strategic Planning

Domain separation is supported for Strategic Planning. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

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Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

Overview of domain separation in Strategic Planning

You can create lens, portfolio plans, planning items, and roadmaps in different domains.

How domain separation works in Strategic Planning

After you enable domain separation on your ServiceNow instance, the data of Strategic Planning is automatically domain separated. So, the data of lens, portfolio plans, planning items, and roadmap configuration for different domains is visible to only those users who have access to these domains.

Domain separated tables in Strategic Planning

All the tables installed with Strategic Planning support domain separation. For a complete list of tables, see Components installed with Strategic Planning Workspace.

Related topics

Domain separation for service providers

Planning item reorder errors in Strategic Planning Workspace

Review the scenarios when the reordering of items can fail in the List view of Prioritization in Strategic Planning Workspace.

To update the rank of the planning items in the work pipeline of your portfolio plan, you can reorder the items from the List view of the Prioritization page. While doing so, the reorder can fail due to an error in the ranking configuration. Following are the scenarios where reordering of planning items can fail:

Scenario 1: Global ranking plugin is not active

Check if the Global Ranking Application plugin (com.snc.sdlc.ranking) is active in your ServiceNow instance. If not, contact your admin to activate it.

Scenario 2: Planning item doesn't have a rank configuration

Check if all the planning items that you are reordering have a rank configuration. If not, contact your admin to update rank configuration for these planning item types.

Scenario 3: Target row doesn't have a global rank

Check if the planning item before or after your target position to reorder has a global rank. If not, contact your system admin to generate a global rank for them.

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Related topics

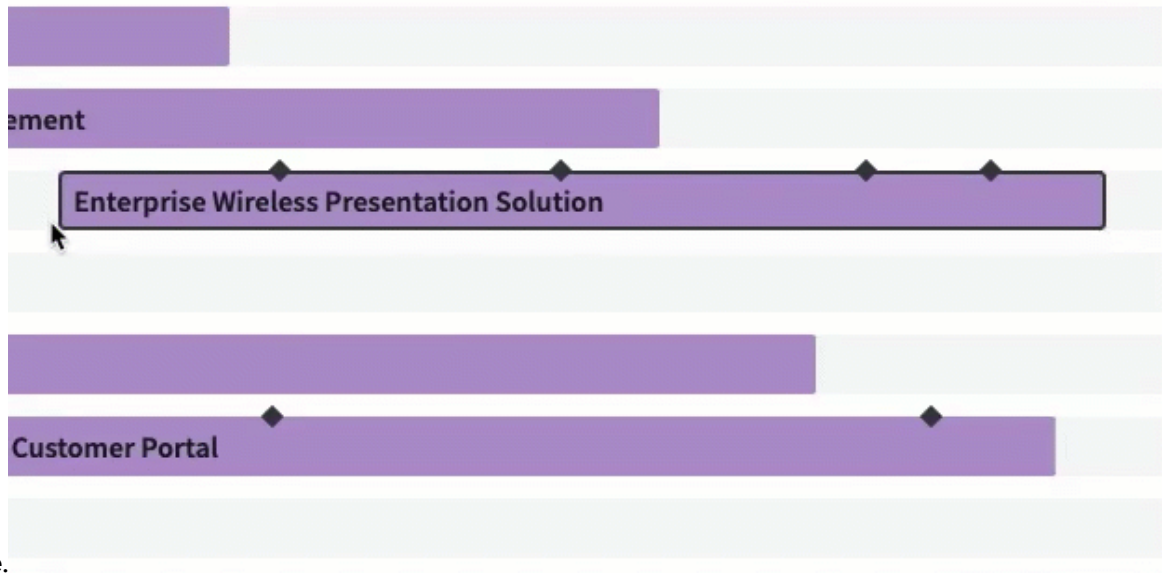
Rank planning items in Strategic Planning

Item milestone errors in Strategic Planning Workspace

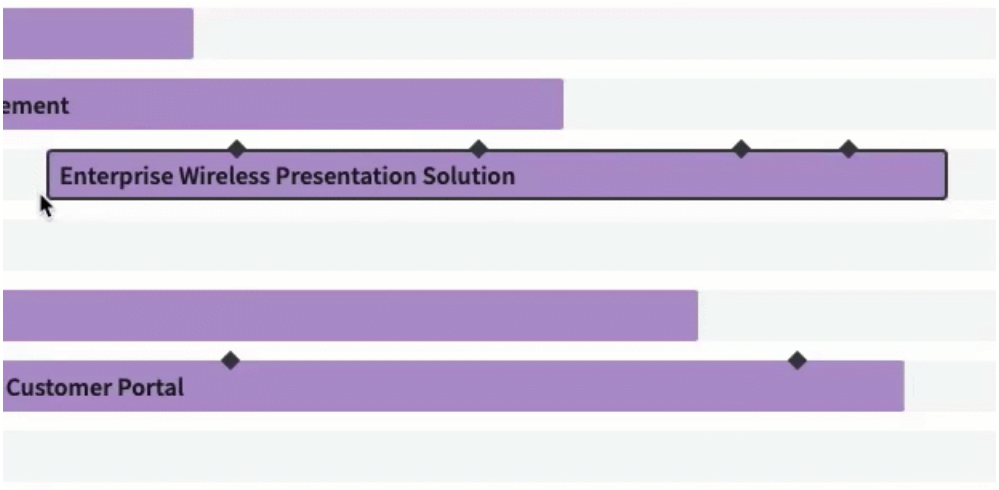
Learn about the scenarios when the planning item milestones on the portfolio plan roadmap or free-form roadmap can be in an error state in Strategic Planning Workspace.

An item milestone can fall out of the approved start or end dates of the item when you reschedule the existing planning item.

When you reschedule a planning item on the roadmap, the due dates of its milestones don't change. So, if the due date of a milestone is falls outside the item's date range, the indicator for that out-of-range milestone is hidden and moved to an error state. Indicators for milestones that are still within the item's date range are visible.



The milestones that are out of sync with the item's schedule can be viewed from the Milestones tab on the side panel. From the side panel, you can edit and adjust the due date of the milestone to reflect the change of plans. See Update roadmap item milestones in Strategic Planning Workspace.



Note:
You can't update a project milestone from the roadmap view. Updating project milestones may impact the associated cost and resource plans of the project. So, it's recommended to update project milestones using Project Workspace in Project Portfolio Management (PPM).

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Related topics

- Add dependencies for roadmap items in Strategic Planning Workspace
- Update roadmap item dependencies in Strategic Planning Workspace
- Customizing the dependencies display on the roadmap in Strategic Planning Workspace

Item dependency errors in Strategic Planning Workspace

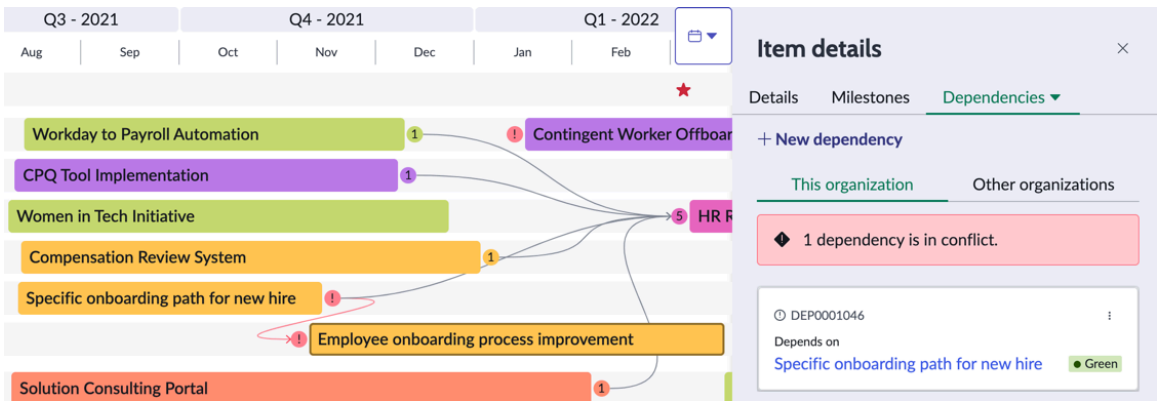
Learn about the scenarios when the planning item dependencies on the portfolio plan roadmap or free-form roadmap in Strategic Planning and Portfolio Planning can be in an error state.

A dependency between two planning items can be in an error state when a scheduling conflict exists between the items. In a linear (Depends on) dependency, the items are scheduled in a way that starting the work on one item requires completing the work on another item.

Note:
Error states are displayed for only if the planning items have a **Depends on** type of relationship.

In the sample roadmap shown here, starting work on **Employee onboarding process improvement** is dependent on the completion of **Specific onboarding path for new hire**. This relation is considered a linear dependency. Here, **Employee onboarding process improvement** is scheduled to start before the end date of **Specific onboarding path for new hire**. This conflict is indicated on the roadmap with an error icon ( ), and is also mentioned in the Dependencies tab of the Item details side panel.

To resolve such errors, review the scope of the planning items and update the start or end dates to adjust their scheduling accordingly.



Related topics

- Add dependencies for roadmap items in Strategic Planning Workspace
- Update roadmap item dependencies in Strategic Planning Workspace

Managing Strategic Planning with Project Portfolio Management, Agile Development 2.0, and SAFe

Ensure that Strategic Planning is integrated properly with PPM, Agile Development 2.0, and SAFe with these guidelines.

- Do not change the filter condition of a table map after the records are interfaced. The already interfaced records might not match with the new filter condition and any change in the filter condition can result in data inconsistency. If you need to change the filter condition, ensure that the relevant attributes on the interfaced records are updated manually to avoid data inconsistency issues.

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- Whenever a table map is created, ensure that the relevant field maps and choice maps are also configured.
- When an import job for a table map is running (processing), do not modify the table map or its field maps.
- Using the **Converted to** field on the planning item form, you can identify the original record from which it was converted.
- Ensure that the **Lookup field** and **Lookup column** values are added whenever the execution and alignment tables are referencing two different tables, while creating a field map for field type of reference or glide list.
- If there is a data synchronization failure, check if:
  - The **Integration error logs** related list within that Alignment integration record.
  - The **Alignment table filter** (for import) and **Execution table filter** (for export) conditions are met.
  - The **Active** flag in both the alignment integration and the table map is checked.
  - The appropriate fields and choices are configured for each table map.
- If you want to view the **Execution URL** field, configure the alignment planning item record to view it.
- If the Execution URL field in your synced planning item(s) is blank, navigate to **All** > **Strategic Planning** > **Integrations** and select the required alignment integration. If any of the execution URL is missing, select the **Fix execution URL(s) for planning items** related link. This runs a job and updates the execution URL field.

  Note:
  The **Fix execution URL(s) for planning items** related link is only available when the execution URL is missing for any of the planning item.

- A **Primary goal** field is introduced to the projects, demands, and epics table maps to support the integration of the **Goal** field between alignment and execution tables.
- When you are trying to import or export a project, ensure that the demands (that are a part of that project) are synced.
- You can create a table map for any execution table. If a table map is not created from one of the delivered tables (pm_portfolio, rm_epic, dmn_demand, pm_project) or does not extend from them, you are required to create a business rule to support the interfacing of the table map records. For more information on creating a business rule, see Create a business rule to apply a custom table map configuration.

Form field information for Strategic Planning

Field information for forms used in the Strategic Planning application.

Action Assignment form

Learn about the fields of the Action Assignment form. Use this form to add the **New** action button to the APW List Menu Configuration page.

Goal form

Field	Description
Action Label	Name of the action label. Enter `New`.
Action name	Name of the action. Enter `create-new-uxf`.

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Goal form (continued)

Field	Description
Implemented as	Implementation for the action. Select **UXF Client Action**.
Table	Name of the table the action is created for. Select **sys_ux_list_menu_config**.
Specify client Action	Client action. Look up and select **Create New Record**.
View	View of the form on which the action button is displayed.

Choice map form

Understand the fields of the choice map form. This form is used to create choice maps.

Choice map form

Field	Description
Execution table column	Field column of the selected execution table that needs to be mapped. The value in this field is automatically added based on the selection made in the field map configuration.
Execution choice	Select the choice field value of the selected execution table column field.
Alignment table column	Field column of the selected alignment table that needs to be mapped. The value in this field is automatically added based on the selection made in the field map configuration.
Alignment choice	Select the choice field value of the selected alignment table column field.

Context Variable form

Use the Context Variable form to create a context variable for a target source for calculating the actual value of the target based on the configured input values.

Context Variable form

Field	Description
Type	Context variable type. For information about the different field types, see Field types.
Application	Name of the application scope.
Label	Name of the label that the context variable type is created for.
Column name	ID of the context variable for which the context variable type is created.
Choice List Specification	Option to display the context variables on the Target form in the Actual Value Source Configuration section.
Default value	Default value to consider for updating the actual value of the target.

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Create cost plan form

Use this form to create cost plans for your planning items.

Create cost plan form

Field	Description
Name	Name of the cost plan.
Entered currency	Currency to capture the unit cost value.
Unit cost	Planned cost for the cost plan.
Quantity	Quantity of cost plans.
Total planned cost	Total planned costs value of the cost plan.
Start fiscal period	Starting month in a fiscal period for the cost plan.
End fiscal period	Ending month in a fiscal period for the cost plan.
Cost distribution	Allocate planned cost by fiscal period or duration. Select a value from the list. • **Split equally across fiscal periods** - Distributes the cost equally among all the fiscal periods across the duration. • **Recurring per fiscal period** - Recurs the cost for each fiscal period across the duration.
Cost type	Cost type of the cost plan. Select a cost type form the list. **Note:** Based on the selected cost type, the **Role** and **Product model** fields appear.
Employee type	Read-only field. • **External** if Cost type is External labor Capex or External labor Opex. • **Internal** if Cost type is Labor Capex or Labor Opex.
Role	Name of the role to expense the cost plan.
Product model	Available if the Cost type is Software, Hardware, or Other Capex or Opex. Select a model from the list to expense the cost plan. Model name of a hardware expenditure to expense the cost plan.

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Create expense line form

Use this form to create expense lines for your actual expense.

Create expense line form

Field	Description
Number	Auto-generated number for the expense line.
Amount	Expense incurred.
Short description	Short description of the expense. Mention unique and specific details to identify the expense line.
Date	Date of the expense.
Process date	Processed date of the expense.
Cost plan	Associated cost plan name for recording the expense line.
Cost type	Cost type of the expense. by default, the cost type of the cost plan is selected.
State	State of the expense line. Only processed expense lines are considered for an investment entity.
Expense type	Defines the expense type, internal or external. By default, the expense type is considered from the **Cost type** field entry.
Rate card	Name of the rate card.
Summary type	Business purpose of the expense line.

Dependency form

Learn about the fields of the dependency form. Use this form to add and establish dependencies between planning items on the roadmap in Strategic Planning workspace.

Dependency form

Field	Description
Planning item	Planning item that you selected from the roadmap, to create the dependency. Consider this as the successor item. This field is automatically filled based on your selection.
Relationship type	Choose one of the following:

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Dependency form (continued)

Field	Description
	• Depends on: Starting the work on one item depends on finishing the work of the other item. This dependency is considered a linear relationship. • Relates to: Work of the two items is related to each other but doesn't have a strict dependency on each other's completion. This dependency is considered a non-linear relationship.
Planning item	Planning item that is required. Consider this as the predecessor item.
Number	System-generated unique identification number for the dependency.

Related topics

Planning item dependencies

Add dependencies for roadmap items in Strategic Planning Workspace

Field map form

Understand the fields of the field map form. This form is used to create mappings for a corresponding table map.

Field map form

Field	Description
Execution table	Table in Agile Development 2.0, SAFe, or PPM that needs to be mapped with a table in Strategic Planning. The value in this field is automatically added based on the selection made in the table map configuration.
Execution table column	Field column of the selected execution table that needs to be mapped.
Alignment table	Table in Strategic Planning that needs to be mapped with a table in Agile Development 2.0, SAFe, or PPM. The value in this field is automatically added based on the selection made in the table map configuration.
Alignment table column	Field column of the selected alignment table that needs to be mapped.
Flow type	Specifies whether the mapping is done from alignment to execution, execution to alignment, or both.

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Field map form (continued)

Field	Description
	Here, alignment implies Strategic Planning, and execution implies PPM, Agile Development 2.0, and SAFe applications.

Goal Assigned Entity Configuration form

Use the Goal Assigned Entity Configuration form to configure a table for an assigned entity type so that the goal user can associate goals with the required assigned entity.

Goal Assigned Entity Configuration form

Field	Description
Assigned entity table	Entity table that a goal is assigned to.
Application	Name of the application scope.
Assigned entity field	Reference field on the goal form.

Goal form

Use the Goal form to create goals for your organizational strategic priorities.

Note:
For ESG Workspace and Strategic Planning users, to view the other fields (that are not added to the default or your custom form view) on the form in the workspace, configure the default/custom form layout. For information on how to configure the form layout, see Configuring the form layout.

Goal form

Field	Description
Name	Name of the goal.
State	State of the goal. The state can be **Draft**, **In progress**, **Approved**, **Complete**, **Pending**, **Achieved**, or **Not Achieved**.
Category	Category of the goal. The available options are: • **Total Applications** • **Total Cost** • **Opex** • **Capex** • **Cloud Applications** • **Homegrown Applications** • **Support Cost** • **Labor Cost** • **Standards Compliance** • **Strategic**

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Goal form (continued)

Field	Description
	• **Operational** • **Tactical**
Status	Status of the goal. Status can be **Red**, **Yellow**, **Green**, or **None**.
Progress	Percentage complete for the goal. The progress value is calculated automatically if the goal has sub-goals or/and targets. For more information on how the progress value is calculated, see Progress value calculation.
Description	Brief description of the goal.

Parent information section of the Goal form

Field	Description
Strategic priority	Name of the strategic priority that this goal is created for.
Parent goal	Name of the parent goal that this goal contributes to.
Impact on parent goal	A numerical value that represents the importance of this goal relative to sibling goals or other goals under its parent goal. By default, the value is (1) Neutral. The available options are: • **(0) No impact** • **(1) Neutral** • **(2) Moderate** • **(3) High** • **(4) Very high** • **(5) Maximum** **Note:** This field is available only when the **sn_gf.weighted_average_enabled** system property is set to **Yes**.

Owners & Contributors section of the Goal form

Field	Description
Assigned entity type	Entity type to which the goal is assigned. For example, Business Unit, Department, Company, or Portfolio.

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Owners & Contributors section of the Goal form (continued)

Field	Description
Assigned entity	Entity to which the goal is assigned. For example,if the portfolio plan is created with Business Units, HR and IT, populate the Assigned entity type as Business Unit and Assigned entity type as HR or IT. **Note:** Populating the Assigned entity type and Assigned entity fields are required to display the goals in the portfolio plan.
Owner	Owner of the goal. By default, the name of the user creating the goal is populated.
Contributors	Users who contribute to the achievement of the goal.

Duration section of the Goal form

Field	Description
Start date	Start date for the goal. By default, the start date of the current quarter is populated. For a sub-goal, start date of its parent goal is populated.
End date	End date for the goal. By default, the end date of the current quarter is populated. For a sub-goal, the end date of its parent goal is populated.

Other section of the Goal form

Field	Description
Comments	Detailed comments for the goal to facilitate collaboration.
Team	Assignment group responsible for different activities in achieving the goal.
Classification	Goal classification type. The available options are **Environmental**, **Social**, and **Governance**. This field is applicable only for the ESG Workspace users.

Related topics

Iteration goals and work item goals in EAP

Goal Preferences form

Use the Goal Preferences form to manage goals such as the calendar type used for goal setting, weighted average calculation for goal progress, and deletion of goals and targets.

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Goal Preferences form

Property	Description
Enable the weighted average logic to calculate the progress of goals from their sub-goals and targets.	When enabled, the fields, **Impact on parent goal** and**Impact on goal** appear in the Goal [sn_gf_goal] and Target [sn_gf_goal_target] tables respectively. The progress value of the parent goal is calculated by applying the Weighted Average logic. The default value is **Yes**. The progress value of a parent goal is calculated based on the progress value and the value defined in the **Impact on parent goal** and**Impact on goal** fields for sub-goals and targets respectively. For more information on how the progress value is calculated, see progress value calculation.
Allow deletion of goals.	Can delete the goals. The default value is **Yes**.
Allow deletion of targets.	Can delete the targets. The default value is **Yes**. **Note:** When you delete a goal, its associated targets (if any) are also deleted even though the **Allow the deletion of targets** property is set to **No**.
Calendar type used for setting goals.	Calendar type that is used for setting goals. The available calendar types are Gregorian calendar and Fiscal period. The default value is **Gregorian calendar**.
Disable target breakdowns at the instance level.	Can disable the target breakdowns feature. When the feature is enabled, target breakdowns are automatically created based on the breakdown interval set for the target. The default value is false.

Goal/Target Relationship form

Use the Goal/Target Relationship form to create a relationship between a goal and planning item, strategic item, or any other item.

Goal/Target Relationship form fields for Planning and Strategic item

Field	Description
Goal	Name of the goal you want to associate the planning item with.
Target	Name of the target you want to associate the planning item with.
Primary	Option to make the goal/target relationship as primary.

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Goal/Target Relationship form fields for Planning and Strategic item (continued)

Field	Description
	Selecting this field automatically populates the **Primary goal** and **Primary target** fields on the planning item form.
Planning item type	Type of planning item.
Planning item	Planning item with which a goal relationship is created with the goal.

Goal/Target Relationship form fields for an item(that is of entity type, Product Model)

Field	Description
Table	Name of the reference table.
Document ID	Document ID of the column from the selected reference table. The suggested values in this field depend on the reference table selected in the **Table** field.

Highlighted Value form

Learn about the fields of the Highlighted Value form. Use this form to customize the fields to be highlighted on the Prioritization page of a portfolio plan in Strategic Planning workspace.

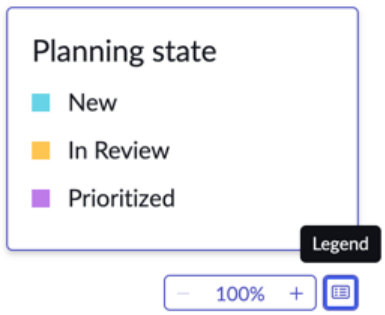
Field	Description
Table	Table which contains the highlighted columns. Enter **sn_align_core_planning_item**.
Application	Scope of yourServiceNow instance. By default, this field is set to **Portfolio Planning**.
Field	Column of the table that is highlighted in the workspace.

Highlighted Value Condition form

Learn about the fields of the Highlighted Value Conditions form. Use this form to configure the display of highlighted fields in Strategic Planning workspace.

Field	Description
Condition	Condition for the field value. For example, Status is Green.
Color	Color for the field value that meets the condition specified.
Application	Scope of yourServiceNow instance. By default, this field is set to **Portfolio Planning**.

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Field	Description
Order	Order in which this color appears on the legend in the Hierarchy view of the Prioritization page. For example, for the Planning Status column, the value **New** is given the order 1. 
Hide Label	Option to hide the label for the highlighted value condition. When selected, the Label field is not available.
Label	Name of the label displayed for the highlighted value condition. This field is not available when **Hide Label** is selected.
Show Icon	Option to show icon beside the field value.
Icon	Icon that is displayed beside the field value. This field is shown only if the **Show Icon** field is selected.
Variant	Option to define color variant. The available options are **primary**, **secondary**, and **tertiary**.
Value Override	Custom display text that replaces the actual field value in the view. When specified, the override text appears instead of the stored value.

Initiative form

Learn about the fields of the initiative form. Use this form to create or edit the details of an Initiative in Strategic Planning.

These fields are displayed on the full details page of the initiative.

Initiative form

Field	Description
Name	Brief description of the initiative.
Description	Detailed information of the initiative.

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Initiative form (continued)

Field	Description
	You can refine initiative description using the Refine records skill, if the Now Assist for SPM application is installed.
State	Current working state of the initiative.
Owner	User assigned to this initiative.
Planning state	State of the initiative in the Strategic Planning workspace.
Percent complete	Percentage of work completed for this initiative.
MoSCoW	Priority of this initiative based on its importance. The available options are: • **1 - Must have** • **2 - Should have** • **3 - Could have** • **4 - Won't have**
Work notes	Notes to capture the updates and discussions on the initiative as the work progresses.
Strategic priority	Strategic priority that this initiative is associated to.

Details section of the Initiative form

Field	Description
Approved start date	Approved start date for this initiative.
Approved end date	Approved end date for this initiative.
Actual start date	Actual date on which the work for this initiative has started.
Actual end date	Actual date on which the work for this initiative is complete.
Priority	Priority of this initiative.
Business capabilities	Business capabilities of this initiative.
Business application	Business application that this initiative is related to.
Other impacted business applications	Business applications that this initiative has an impact on.

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Business case section of the Initiative form

Field	Description
Overview	Business case overview of this initiative.
Background	Background for this initiative.
Limitations	Applicable limits to this initiative.
Approach	Planned approach to work on this initiative.
Benefit	Business benefit from this initiative.

Financials section of the Initiative form

In this section, capture financial details for this initiative such as cost, CapEx, OpEx, benefit, ROI, and other estimates.

Field	Description
Planned cost	Planned cost to take up this initiative.
Planned capEx	Planned capital expenditure for this initiative.
Planned opEx	Planned operational expenditure for this initiative.
Planned benefit	Planned benefit from this initiative.
Actual benefit	Actual benefit achieved from this initiative,
Actual cost	Actual cost on this initiative.
Actual capEx	Actual value of capital expenditure for this initiative.
Actual opEx	Actual value of operational expenditure for this initiative.
Planned ROI	Planned return of investment for this initiative.

Related topics

- Create planning items from the roadmap view in Strategic Planning Workspace
- Add planning items to Prioritization page of Strategic Planning Workspace

Lens form

Learn about the fields of the Lens form. Use this form to create a lens in Strategic Planning.

Lens form

Field	Description
Name	Name of the lens.
Active	Indicates if the lens is active.
Description	Brief description of the lens.

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Lens form (continued)

Field	Description
	You can indicate the business purpose of this lens and the planning managers that would use this lens.
Planning items	Type of work that can be planned using this lens. Move the desired planning item types from the **Available** list to the **Selected** list.

If you want additional planning items types, you can create them. See Define a new planning item type in Strategic Planning.

Related topics

Create or modify a lens in Strategic Planning

Lens structure form

Learn about the fields of the Lens structure form. Use this form to define a structure for your lens in Strategic Planning.

Lens structure form

Field	Description
Entity	Source table for your lens entity. An entity represents a planning level in the perspective of your lens. Select the entity that is relevant for your planning persona from the perspective of this lens. For example, Department, Product Model, or Business Objective.
Entity filter	Conditions to filter data from your entity source. The filtered data is shown on the workspace for your planning persona to select and plan for.
Top entity	Indicates if this entity is the top-level entity of your lens structure.
Parent entity	Entity that is one level above this entity in your current lens structure. This field is available only if the **Top entity** field isn't selected.
Reference to parent entity	Column in the current entity table that references the parent entity table.

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Lens structure form (continued)

Field	Description
	For example: • Entity is **Strategic Program [sn_align_core_program]** • Parent entity is **Department [cmn_department]** Then the field of the Strategic Program [sn_align_core_program] table that references the Department [cmn_Department] table would be **Department**. This field is available only if the **Top entity** field isn't selected.

Related topics

Add or modify lens structure in Strategic Planning

List Applicability form

Learn the field information for the List Applicability form. Use this information to define audience for the newly created lists for Strategic Planning workspace.

Field	Description
List	Name of the list that you want to define audience for.
Application	This field is set to **Portfolio Planning** by default.
Applicability	Audience for this list. Set this field to **Alignment Workspace Home Audience**.
Active	Option to enable this applicability to the list.

Planning item type form

Learn about the fields of the new table form that are required to add a new planning item type in Strategic Planning.

New table form

Field	Description
Label	Unique label for the table.
Name	This field is auto generated from your input in the **Label field**.

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New table form (continued)

Field	Description
Application	This field is automatically set to **Portfolio Planning** based on your scope. If this field shows a different value, then ensure that your ServiceNow instance is in **Portfolio Planning** scope.
Extends table	If this new table is a type of planning item, select **Planning Item**.

Controls section of the new planning item type form

Field	Description
User role	Set this field to **sn_align_core.apw_user** so that you grant access to the Strategic Planning user to this table.

Application Access section of the new planning item type form

Application Access
Enable the **Can read**, **Can create**, **Can update**, and **Can delete** fields.

Related topics

Define a new planning item type in Strategic Planning

Planning item form

Learn about the fields in the forms of the different planning item types available in Strategic Planning. Use these forms to add new planning items or update details of existing items.

All planning item types in Strategic Planning including any custom item type that your admin may have created, are an extension of the Planning Item [sn_align_core_planning_item] table. The planning item form fields that you see in the workspace are based on the item types configured for your portfolio plan.

The following are the different planning item types available by default. Use the following sections for the details of the form fields for the planning item type that you want to use.

- Demand form
- Epic planning item form
- Initiative form
- Project planning item form
- Strategic program form

Related topics

Create planning items from the roadmap view in Strategic Planning Workspace

Add planning items to Prioritization page of Strategic Planning Workspace

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Epic planning item form

Learn about the fields of the epic form. Use this form to create or edit the details of a planning item of the type Epic in Strategic Planning.

These fields are displayed on the full details page of the planning item.

Epic planning item form

Field	Description
Name	Brief description of the planning item.
Description	Detailed information of the planning item.
State	Current working state of the planning item.
Owner	User assigned to this planning item.
Planning state	State of the planning item in the Strategic Planning Backlog.
Percent complete	Percentage of work completed for this planning item.
Methodology	Agile methodology used.
Enabler	Option to indicate if this epic is an enabler.
MoSCoW	Priority of this planning item based on its importance. The available options are: • **1 - Must have** • **2 - Should have** • **3 - Could have** • **4 - Won't have**
Portfolio	Portfolio that this planning item is associated to.
Product	Product that this planning item is associated to.
Strategic program	Strategic program that this planning item is associated to.
Product enhancement	Product enhancement that this planning item is associated to.
Primary goal	Goal that is associated with this planning item as the primary goal.
Primary target	Target that is associated with this planning item as the primary target.
Work notes	Notes to capture the updates and discussions on the planning item as the work progresses.
Strategic priority	Strategic priority that this planning item is related to.

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Dates section of the Epic planning item form

Field	Description
Approved start date	Approved start date for this planning item.
Approved end date	Approved end date for this planning item.
Actual start date	Actual date on which the work for this planning item has started.
Actual end date	Actual date on which the work for this planning item is complete.
Planned start date	Planned start date for this planning item.
Planned end date	Planned end date for this planning item.

Details section of the Epic planning item form

In this section, capture additional details for this planning item such as Investment type, Execution type, impacted business application, and more.

Field	Description
Priority	Priority of this planning item.
Phase	Phase of this planning item. This field is available only if the planning item is of the type Project.
Business capabilities	Business capabilities of this planning item.
Business application	Business application that this planning item is related to.
Other impacted business applications	Business applications that this planning item has an impact on.
Missing estimate	Number of stories in the epic that are missing estimates.
Percent complete by count	Percentage of completed work in the epic. Story count is used to calculate this value.
Completed count	Number of completed stories in the epic.
Completed estimate	Sum of the estimates of all the completed stories in the epic.
T-Shirt size	Size of the demand.
Total count	Number of stories in the epic.
Total estimate	Sum of the estimates of all stories in the epic.
Percent complete by estimate	Percentage of completed work in the epic. Story estimate is used to calculate this value.

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WSJF score section of the Epic planning item form

*Use this section if your epic is a **SAFe** epic.*

Field	Description
WSJF score	Weighted Shortest Job First (WSJF) score is used to prioritize and sequence jobs to result in optimum business value. An epic with the highest WSJF score gets the highest priority for implementation. This field is automatically filled using other field values in this section.
User-business Value	Business value of the job based on parameters like impact on revenue or other solutions in the market offering similar capabilities.
Job size	Estimated duration for completion of the job.
Time criticality	Impact on the business when deadlines are missed. For example, how projected revenue gains are reduced over time when deadlines are shifted.
Risk reduction	Analyze how much risk that this epic can help you avoid by answering questions such as: • Does the job add value to the business in other ways? • Does the job bring in new business opportunities? • Does the job reduce the risk for a future delivery?

Financials section of the Epic planning item form

In this section, capture financial details for this planning item such as cost, CapEx, OpEx, benefit, ROI, and other estimates.

Field	Description
Planned cost	Planned cost to take up this planning item.
Planned capEx	Planned capital expenditure for this planning item.
Planned opEx	Planned operational expenditure for this planning item.
Planned benefit	Planned benefit from this planning item.
Actual benefit	Actual benefit achieved from this planning item,
Actual cost	Actual cost on this planning item.

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Financials section of the Epic planning item form

In this section, capture financial details for this planning item such as cost, CapEx, OpEx, benefit, ROI, and other estimates.

(continued)

Field	Description
Actual capEx	Actual value of capital expenditure for this planning item.
Actual opEx	Actual value of operational expenditure for this planning item.
Planned ROI	Planned return of investment for this planning item.

Related topics

Create planning items from the roadmap view in Strategic Planning Workspace

Add planning items to Prioritization page of Strategic Planning Workspace

Demand planning item form

Learn about the fields of the demand form. Use this form to create or edit the details of a planning item of the type Demand in Strategic Planning.

These fields are displayed on the full details page of the planning item.

Demand planning item form

Field	Description
Name	Brief description of the planning item.
Description	Detailed information of the planning item.
State	Current working state of the planning item.
Owner	User assigned to this planning item.
Planning state	State of the planning item in the Strategic Planning Backlog.
Category	Category of this planning item. Choose from **Strategic** or **Operational**.
MoSCoW	Priority of this planning item based on its importance. The available options are: • **1 - Must have** • **2 - Should have** • **3 - Could have** • **4 - Won't have**
Portfolio	Portfolio that this planning item is associated to.
Program	Program that this planning item is associated to.

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Demand planning item form (continued)

Field	Description
Product	Product that this planning item is associated to.
Strategic program	Strategic program that this planning item is associated to.
Primary goal	Goal that is associated with this planning item as the primary goal.
Product enhancement	Product enhancement that this planning item is associated to.
Primary target	Target that is associated with this planning item as the primary target.
Work notes	Notes to capture the updates and discussions on the planning item as the work progresses.
Strategic priority	Strategic priority that this planning item is associated to.

Dates section of the Demand planning item form

Field	Description
Approved start date	Approved start date for this planning item.
Approved end date	Approved end date for this planning item.
Planned start date	Date on which the work for this planning item is planned to start. This value is copied from the **Approved start date** field.
Planned end date	Date on which the work for this planning item is planned to be complete. This value is copied from the **Approved end date** field.

Details section of the Demand planning item form

In this section, capture additional details for this planning item such as Investment type, Execution type, impacted business application, and more.

Field	Description
Investment class	Choose from **Run** and **Change**
Investment type	Type of investment this planning item comes under. For example, if completing work on this item improves the user experience for your product, select **End User Experience**.
Priority	Priority of this planning item.
Business application	Business application that this planning item is related to.

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Details section of the Demand planning item form

In this section, capture additional details for this planning item such as Investment type, Execution type, impacted business application, and more.

(continued)

Field	Description
Other impacted business applications	Business applications that this planning item has an impact on.
Business capabilities	Business capabilities of this planning item.

Business case section of the Demand planning item form

In this section, capture business details for this planning item such as risks, scope, blockers for this planning item.

Field	Description
Business case	Business case to invest in this planning item.
Risk of performing	Risks to the business if work on this planning item is completed.
Risk of not performing	Risks to the business if work on this planning item isn't completed.
Enablers	Enablers for this demand.
Barriers	Blockers, if any, for this planning item.
In scope	Defined criteria for this planning item.
Out of scope	Clearly defined criteria that is not necessary for this planning item.
Assumptions	Assumptions, if any, to work on this planning item.

Financials section of the Demand planning item form

In this section, capture financial details for this planning item such as cost, CapEx, OpEx, benefit, ROI, and other estimates.

Field	Description
Planned cost	Planned cost to take up this planning item.
Planned capEx	Planned capital expenditure for this planning item.
Planned opEx	Planned operational expenditure for this planning item.
Planned ROI	Planned return of investment for this planning item.
Financial return	Financial return on this planning item.
Planned benefit	Planned benefit from this planning item.

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Assessment data section of the Demand planning item form

Field	Description
Impact	Impact that this planning item has on the business.
Risk	Numerical value for the risk associated with this planning item.
Value	Numerical value for the value obtained with this planning item.
Score	Score of the planning item.

Related topics

- Create planning items from the roadmap view in Strategic Planning Workspace
- Add planning items to Prioritization page of Strategic Planning Workspace

Project planning item form

Learn about the fields of the project form. Use this form to create or edit the details of a planning item of the type Project in Strategic Planning workspace.

These fields are displayed on the full details page of the planning item.

Project planning item form

Field	Description
Name	Brief description of the planning item.
Description	Detailed information of the planning item.
Status	Status of the planning item.
Owner	User assigned to this planning item.
State	Current working state of the planning item.
Percent complete	Percentage of work completed for this planning item.
Planning state	State of the planning item in the Strategic Planning or Portfolio Planning Backlog.
MoSCoW	Priority of this planning item based on its importance. The available options are: • **1 - Must have** • **2 - Should have** • **3 - Could have** • **4 - Won't have**
Portfolio	Portfolio that this planning item is associated to.
Program	Program that this planning item is associated to.

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Project planning item form (continued)

Field	Description
Product	Product that this planning item is associated to.
Strategic program	Strategic program that this planning item is associated to.
Product enhancement	Product enhancement that this planning item is associated to.
Primary goal	Goal that is associated with this planning item as the primary goal.
Primary target	Target that is associated with this planning item as the primary target.
Work notes	Notes to capture the updates and discussions on the planning item as the work progresses.
Strategic priority	Strategic priority that this planning item is related to.

Dates section of the Project planning item form

Field	Description
Planned start date	Date on which the work for this planning item is planned to start. This value is copied from the **Approved start date** field.
Planned end date	Date on which the work for this planning item is planned to be complete. This value is copied from the **Approved end date** field.
Approved start date	Approved start date for this planning item.
Approved end date	Approved end date for this planning item.
Actual start date	Actual date on which the work for this planning item has started.
Actual end date	Actual date on which the work for this planning item is complete.

Details section of the Project planning item form

In this section, capture additional details for this planning item such as Investment type, Phase of the planning item, Execution type, affected business application, and more.

Field	Description
Investment class	Type of investment class that this planning item comes under. Choose from **Run** and **Change**
Investment type	Type of investment that this planning item comes under. For example, if completing work

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Details section of the Project planning item form

In this section, capture additional details for this planning item such as Investment type, Phase of the planning item, Execution type, affected business application, and more.

(continued)

Field	Description
	on this item improves the user experience for your product, select **End User Experience**.
Demand	Demand that this planning item is associated with.
Execution type	Execution methodology for this planning item. Select from **Waterfall**, **Agile**, or **Hybrid**. This field is available only if the planning item is of the type Project.
Priority	Priority of this planning item.
Phase	Phase of this planning item. This field is available only if the planning item is of the type Project.
Business application	Business application that this planning item is related to.
Other impacted business applications	Business applications that this planning item has an impact on.
Business capabilities	Business capabilities of this planning item.

Business case section of the Project planning item form

In this section, capture business details for this planning item such as risks, scope, and blockers for this planning item.

Field	Description
Business case	Business case to invest in this planning item.
Risk of performing	Risks to the business if work on this planning item is completed.
Risk of not performing	Risks to the business if work on this planning item isn't completed.
Enablers	Enablers for this project.
Barriers	Blockers, if any, for this planning item.
In scope	Defined criteria for this planning item.
Out of scope	Clearly defined criteria that is not necessary for this planning item.
Assumptions	Assumptions, if any, to work on this planning item.

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Financials section of the Project planning item form

In this section, capture financial details for this planning item such as cost, CapEx, OpEx, benefit, ROI, and other estimates.

Field	Description
Planned cost	Planned cost to take up this planning item.
Planned capEx	Planned capital expenditure for this planning item.
Planned opEx	Planned operational expenditure for this planning item.
Planned benefit	Planned benefit from this planning item.
Actual benefit	Actual benefit achieved from this planning item,
Estimate to completion	Estimated cost to complete work on this planning item.
Actual cost	Actual cost on this planning item.
Actual capEx	Actual value of capital expenditure for this planning item.
Actual opEx	Actual value of operational expenditure for this planning item.
Planned ROI	Planned return of investment for this planning item.
Planned return	Financial return on this planning item.
Estimate at completion	Estimated cost at the time that work on this planning item is completed.

Score section of the Project planning item form

In this section, capture scoring details for this planning item such as score, value score, risk score, and size score.

Field	Description
Score	
Value score	Score for the value obtained with this planning item.
Risk score	Score for the risk associated with this planning item.
Size score	Score for the job required to complete the task.

Related topics

Create planning items from the roadmap view in Strategic Planning Workspace

Add planning items to Prioritization page of Strategic Planning Workspace

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Planning item milestone form

Learn about the fields of the planning item milestone form. Use this form to create milestones for the planning items in your roadmap in Strategic Planning workspace.

Field	Description
Name	Preferred name for your milestone.
Type	Milestone type. Select one from the following: • Deadline • Key Milestone • Key Event • Launch Date • Important Date
Due date	The date of the milestone.
State	Status of the milestone. Select one from the following: • Upcoming • Missed • Achieved
Assigned to	User who is assigned to the milestone.
Description	Brief description about the milestone.

Related topics

- Add dependencies for roadmap items in Strategic Planning Workspace
- Update roadmap item dependencies in Strategic Planning Workspace
- Customizing the dependencies display on the roadmap in Strategic Planning Workspace

Portfolio plan configuration form

Learn about the fields of the Portfolio plan form. Use this form to create or update display settings of the planning items for a portfolio plan in Strategic Planning Workspace.

Portfolio plan configuration form

Field	Description
Source table	Table that you want to configure portfolio plan for. For example, **Strategic Priority [sn_gf_strategy]**.
Start date field	Field to retrieve the start date value from.
End date field	Field to retrieve the end date value from.
Item name field	Field to retrieve the name of the item from.

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Portfolio plan configuration form (continued)

Field	Description
Item owner field	Field to retrieve the item owner name from.

Roadmap timeline configuration section of the Portfolio plan configuration form

Field	Description
Group by fields	List of fields with which the roadmap items can be categorized into groups. For example, the **State** attribute can be used to categorize the items into groups of states such as Draft, Ready, Work in progress, and others.
Color by fields	List of fields with which the roadmap items can be categorized by color. For example, the **Planning item type** attribute can be used to assign a unique color to each group of items belonging to a specific type.
Metrics fields	List of fields used as the metrics for the roadmap items. For example, **Planned benefit** or **Actual cost**. These values are displayed when you point the mouse cursor on the roadmap item.
Status field	Field that is used for the status of the roadmap item.
Percent complete field	Field that is used to track the completion of the roadmap item. This field value is used to visualize the progress of the roadmap item in the tracking mode.

Kanban configuration section of the Portfolio plan configuration form

Field	Description
Swim lane	Field to use for the swim lane on the board in the Prioritization Kanban view.
Vertical lane	Field to use for the vertical lane on the board the Prioritization Kanban view.

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Kanban configuration section of the Portfolio plan configuration form (continued)

Field	Description
Metrics on Kanban card	Default metrics that your planning managers want to view on a planning item card in the Prioritization Kanban view.
Swim lane	Field to use for the swim lane on the board in the roadmap view.
Vertical lane	Field to use for the vertical lane on the board in the roadmap view.
Metrics on Kanban card	Default metrics that your planning managers want to view on a planning item card on the Kanban board in the roadmap view.

Rank configuration section of the Portfolio plan configuration form

Field	Description
Rank Configuration	Table that is used to create the portfolio plan. The value for this field is the table selected in the **Source table** field.

Related topics

Create portfolio plan configuration for high-level planning

Product Enhancement form

Learn about the fields of the product enhancement form. Use this form to create or edit the details of a product enhancement in Strategic Planning.

These fields are displayed on the full details page of the product enhancement.

Product Enhancement form

Field	Description
Product	Name of the product that this product enhancement is created for.
Product feature	Product feature that this product enhancement is associated to.
Version	Version of the product enhancement.
Name	Name of the product enhancement.
State	State of the product enhancement.
Assignment group	User group that is assigned to the product enhancement.
Assigned to	User who is assigned to the product enhancement.
Description	Brief description of the product enhancement.

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Product Enhancement form (continued)

Field	Description
Start date	Start date for the product enhancement.
End date	End date for the product enhancement.

Progress value calculation

The progress or percentage complete value of goals is auto-calculated using different formulas. The formula depends on whether the goal has only targets, a combination of sub-goals and targets, and if it has weighted average calculation enabled.

Scenario	Formula used to calculate the progress value of the goal
• The goal has targets. • The goal doesn't have sub-goals. • The **Impact on goal** field is defined for targets.	`Progress value of the goal = Sum of progress values of its associated targets / number of targets`
• The goal has sub-goals and targets. • The **Impact on parent goal** and **Impact on goal** fields are defined for sub-goals and targets respectively.	`Progress value of the goal = Sum of progress values of its sub-goals and associated targets / number of sub-goals and targets`
• The goal has two targets (target 1 and target 2). • The goal doesn't have sub-goals. • The **Impact on goal** field is defined for targets and the **sn_gf.weighted_average_enabled** system property is set to **Yes**.	`Progress value of the goal = [(Progress of target 1 * Weight scale of target 1) + (Progress of target 2 * Weight scale of target 2)] / (Weight scale of target 1 + Weight scale of target 2)`
• The goal has two targets (target 1 and target 2). • The goal has two sub-goals (sub-goal 1 and sub-goal 2). • The **Impact on parent goal** and **Impact on goal** fields are defined for sub-goals and targets respectively and the **sn_gf.weighted_average_enabled** system property is set to **Yes**.	`Progress value of the goal = [(Progress of sub-goal 1 * Weight scale of sub-goal 1) + (Progress of sub-goal 2 * Weight scale of sub-goal 2) + (Progress of target 1 * Weight scale of target 1) + (Progress of target 2 * Weight scale of target 2)] / (Weight scale of sub-goal 1 + Weight scale of sub-goal 2 + Weight scale of target 1 + Weight scale of target 2)`

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Consider a scenario where a goal (G1) has two targets (T1 and T2) and the **Impact on goal** field for T1 and T2 is set to 2 and 3 respectively. The current Progress values of T1 and T2 are 40% and 20% respectively. In this case, the progress value for G1 is calculated as follows:

- Contribution of T1 towards G1 progress = 2/(2+3)*40 = 16%
- Contribution of T2 towards G1 progress = 3/(2+3)*20 = 12%
- Therefore, Progress of G1 = 16% +12% = 28%

Roadmap milestone form

Learn about the fields of the roadmap milestone form. Use this form to create a milestone for the timeline of your roadmap in Strategic Planning workspace.

Field	Description
Name	Preferred name for your milestone.
Type	Milestone type. Select from one of the following: • Key Event • Launch Date • Important Date • Deadline • Key Milestone
Due date	The date of the milestone.
Assigned to	User who is assigned to the milestone.

Related topics

Add milestones for a roadmap in Strategic Planning Workspace

Update a roadmap milestone in Strategic Planning Workspace

Roadmap configuration form

Learn about the fields of the roadmap configuration form. Use this form to add new tables to roadmap preferences and configure their details in Strategic Planning.

Roadmap configuration form

Field	Description
Source table	Table that is used to build your roadmap.
Start date field	Field that is used for the start date of the roadmap item. For example, **Planned start date**.
End date field	Field that is used for the end date of the roadmap item. For example, **Planned end date**.

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Roadmap configuration form (continued)

Field	Description
Item name field	Field that is used for the name of the roadmap item. For example, **Short description**.
Item owner field	Field that is used for the owner of the roadmap item. For example, **Assigned to**.
Status	Field that is used for the status of the roadmap item.
Percent Complete	Field that is used to track the completion of the roadmap item. This field value is used to visualize the progress of the roadmap item in the tracking mode.
Group by fields	List of fields with which the roadmap items can be categorized into groups. For example, the **State** attribute can be used to categorize the items into groups of states such as Draft, Ready, Work in progress, and others.
Color by fields	List of fields with which the roadmap items can be categorized by color. For example, the **Planning item type** attribute can be used to assign a unique color to each group of items belonging to a specific type.
Metric fields	List of fields used as the metrics for the roadmap items. For example, **Planned benefit** or **Actual cost**. These values are displayed when you point the mouse cursor on the roadmap item.

Related topics

Customize the planning item display preferences for Prioritization and Roadmap

Scheduled Script Execution form

Scheduled Jobs are automated pieces of work that can be performed at a specific time or on a recurring schedule.

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Migrate Goal, Strategy, and Work item data to the Goal Framework and related Planning item tables

Use the **Migrate Goal, Strategy, and Work item data to the Goal Framework and related Planning item tables** job to migrate the existing goals data to the Goal Framework tables.

Scheduled Script Execution form

Parameter	Description
migrateGoalData	• Migrates all existing goal records from the Goal [goal] table to the Goal [sn_gf_goal] table. The sys_id remains the same. The corresponding target records will be created in the Target [sn_gf_goal_target] table. • Creates the existing relationship between the goal and work items (Project, Demand, Program) in the Goal Relationship [sn_gf_goal_m2m_relationship] table with the first goal (from the order in the glide list) as the primary goal.
migrateStrategyData	Migrates all existing strategy records from the Enterprise Strategy [enterprise_strategy], Business Unit Strategy [business_unit_strategy], and Strategic Objective [strategic_objective] tables to the Strategic Priority [sn_gf_strategy] table. The sys_id remains the same.
migratingGoalStrategyM2Mdata	In Goal Framework, a goal can be mapped to only one strategy. If an existing goal has two strategies mapped to it, a clone of the goal will be created (one as a generic goal and another as a sub-goal) with the same strategy populated for both. And, for the sub-goal, the first goal will be set as the parent goal. For example, consider a scenario where an existing goal (G1) is mapped to five strategies (S1, S2, S3, S4, and S5). Then, four clones of G1 will be created as sub-goals (G2, G3, G4, and G5) and the parent goal is populated as G1. For the parent goal (G1) and the sub-goals (G2, G3, G4, and G5), the **Strategy** field is populated respectively (S1, S2, S3, S4, and S5). **Note:** The name of the cloned sub-goal will be prefixed with `Cloned SubGoal:`, followed by the parent goal name.
migrateStrategyWorkItemRelData	• Migrates the existing relationship of strategy and work items (Project, Demand, Program) to the Goal Relationship [sn_gf_goal_m2m_relationship] table. • If a goal doesn't have an association between the strategy (as current strategy) and the work item in the Goal Relationship [sn_gf_goal_m2m_relationship] table, a dummy goal will be created with a strategy value of current strategy. And, a goal relationship is created

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Scheduled Script Execution form (continued)

Parameter	Description
	with the dummy goal and the work item in the Goal Relationship [sn_gf_goal_m2m_relationship] table. **Note:** The name of the dummy goal will be prefixed with `Goal:`, followed by the strategy name.

Migrate goal relationships for assigned entities

Use the **Migrate goal relationships for assigned entities** job to populate the fields, **Assigned entity type** and **Assigned entity** on the Goal form based on the existing values in the legacy fields, **Business Unit**, **Department**, **Company**, **Portfolio**, and any customized entity field.

Scheduled Script Execution form

Parameter	Description
Migrate goal relationships for assigned entities	(For Strategic Planning users) Populates the fields, **Assigned entity type** and **Assigned entity** on the Goal form based on the data in the Goal Relationship [sn_gf_goal_m2m_relationship] table if you've created an m2m relationship with lens entities other than **Company**, **Business Unit**, **Department**, and **Portfolio**. If users had already created m2m relationship, they may use this script to move those relationships from the m2m table to the goals table to access and manage those goals in the respective portfolio plans. If the goal has only one relationship with an assign entity table type, the **Assign entity type** and **Assign entity** fields are populated on the Goal [sn_gf_goal] table based on the Goal Relationship [sn_gf_goal_m2m_relationship] table. If the goal has multiple relationships with an assign entity table type, number of relationships (n) cloned sub-goals will be created and the **Assign entity type** and **Assign entity** fields are populated on the Goal [sn_gf_goal] table based on the data in the Goal Relationship [sn_gf_goal_m2m_relationship] table for each cloned sub-goal.

Scheduled Script Execution form to generate labor costs for planning items

Use the Scheduled Script Execution form to enable Generate Labor Costs and Generate Labor Costs For Epic scheduler jobs for your planning items.

Schedule Item form

Field	Description
Name	Name that identifies this scheduled job.
Active	Option that indicates that scheduled job is active and should be executed at the specified date and time.
Run	Time interval to use for running the scheduled job:

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Schedule Item form (continued)

Field	Description
	• **Daily**: Runs daily, at a designated time. • **Weekly**: Runs on a weekly basis, at a designated time and day of the week. • **Monthly**: Runs on a monthly basis, at a designated time and day of the month. • **Periodically**: Runs on a designated repeating interval. • **Once**: Runs for a single occurrence only. • **On Demand**: Runs immediately on demand. • **Business Calendar: Entry Start**: Runs on the starting entry dates for the business calendar that you select in the **Business Calendar** field. A scheduled job runs for the starting date of each of the business entries that you defined for the business calendar. For example, if the business calendar represents a fiscal year, and the starting date of each entry is a fiscal month, the scheduled job runs on the first day of each month. • **Business Calendar: Entry End**: Runs for the ending date for the business calendar that you select in the **Business Calendar** field. This selection runs in the same manner as **Business Calendar: Entry Start**, but for the end dates of the associated business calendar entries. **Note:** When you select **Business Calendar: Entry Start** or **Business Calendar: Entry End**, you can apply an offset factor to schedule the job to run before or after the time span of the selected business calendar. To learn more, see the **Offset type** and **Offset** fields. To learn more about creating and using business calendars and defining business calendar entries, see Creating business calendars and Define business calendar entries.
Time zone	Time zone to use with the **Time** field entry when you specify the time at which the scheduled job should run. Select a time zone entry: • **-None-**: Use the default time zone for the logged-in user who is creating the scheduled job. For example, the scheduled job runs at 04:45 p.m. US/Pacific time if it is the user's assigned time zone, and you enter `16:45` into the **Time** field. • **Use System Time Zone**: Use the default system time zone that is specified for the instance in which it runs. For example, the scheduled job runs at 10:15 p.m. London time if Europe/London is the default system time zone for the instance, and you enter `22:15` in the **Time** field. • Actual time zone. For example, the scheduled job runs at 1:30 p.m. in the US Eastern time zone if you select **US/Eastern**, and enter `13:30` in the **Time** field.

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Schedule Item form (continued)

Field	Description
Day	Day on which the scheduled job should run. • If **Run** is set to **Weekly**, select the day of the week. For example, select Wednesday. • If **Run** is set to **Monthly**, select the day of the month. For example, select 25 for the 25th day of the month. This field appears only if you select **Monthly** or **Weekly** in the **Run** field.
Repeat Interval	Duration of the repeat interval for each scheduled job execution. Enter the duration in the number of days, hours, or minutes. For example: • To run the scheduled job every four days, enter `04` in the **Days** field. • To run it every 26 hours, enter `26` in the **Hours** field. • If it should repeat at an interval of 13:30:25, enter `13` in the **Hours** field, and then enter `30` and `25` in the two unlabeled fields after it. These fields appear only if you select **Periodically** in the **Run** field. **Note:** This setting does not account for Daylight Saving Time changes. For example, if you select a period of one day, the calculation adds 24 hours to the starting time of the job. If the start time is in a Daylight Saving Time (DST) period, the job runs with a one-hour offset when that time zone is not in DST.
Business Calendar	Business calendar entry that you are using to determine the business calendar start or end date for the scheduled job. This field appears only if you select **Business Entry: Start Date** or **Business Entry: End Date** in the **Time** field.
Offset Type	Type of time offset, if any, to apply to the business calendar that you selected for scheduling this job: • **Past**: Apply an offset factor to schedule the job to run before the start of the time span of the selected business calendar. • **Future**: Apply an offset factor to schedule the job to run after the end of the time span of the selected business calendar. • **--None--**: Do not apply a time offset when scheduling this job. Adding an offset factor enables you to schedule the job to run before, or after, the formal time span that is defined in the business calendar for the following use cases: • Schedule a job at a certain time, outside of the time span for the selected business calendar. • Arrange multiple jobs to run in sequence, around the time span of the selected business calendar.

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Schedule Item form (continued)

Field	Description
	The **Offset type** and **Offset** fields appear only if you select **Business Calendar: Entry Start** or **Business Calendar: Entry End** in the **Run** field.
Offset	Amount of time offset, expressed in days, hours, minutes, and seconds, to apply to the business calendar that you selected for scheduling this job. For example, if you want to schedule the job to start three days, 14 hours, 10 minutes, and 45 seconds before the business calendar start date, do the following actions: • Select **Past** in the **Offset type** field. • Enter **3** in the **Days** field. • Enter **14**, **10**, and **45** in the **Hours** field. The **Offset Days** and **Hours** fields appear only if you select **Business Calendar: Entry Start** or **Business Calendar: Entry End** in the **Run** field, and **Past** or **Future** in the **Offset type** field.
Time	Time of day at which the scheduled job should run, expressed in hours, minutes, and seconds on a 24-hour clock. The selection that you make in the **Time zone** field determines the time zone for this entry. **Note:** Time values are always saved in the ServiceNow AI Platform® in UTC time and then translated into the proper time. This translation depends on the selected **Time zone** and the entry in the **Time** field. This field appears only if you select **Daily**, **Weekly**, or **Monthly** in the **Run** field.
Starting	Date and time of the first scheduled job generation. Select the calendar date and time. This field appears only if you select **Periodically** in the **Run** field.
Priority	Numerical priority for the scheduled job: • Set essential jobs to a priority value below 100. • Set nonessential jobs to a priority above 100. • If 70 percent or more of all scheduled jobs are **Overdue**, any jobs that are marked with a value above 100 do not run.
Run as	Name of the user who is creating and running the scheduled job. To assign the scheduled job to the system instead of the person creating the scheduled job, create a system or dummy user and add it to this field.
Conditional	Option for enabling the running of the scheduled job if certain conditions are met in the associated script.
Condition	Conditional script that determines if a scheduled job should run. The last expression of the script should evaluate to a Boolean (true/false) value. This text box appears only if you select **Use conditions**.
Starting	Date and time of the first scheduled job generation. Select the calendar date and time. This field appears only if you select **Periodically** in the **Run** field.

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Strategic program form

Learn about the fields of the Strategic program form. Use this form to create or edit the details of a Strategic Program in Strategic Planning.

These fields are displayed on the full details page of the strategic program.

Strategic program form

Field	Description
Name	Brief description of the strategic program.
Description	Detailed information of the strategic program. You can refine strategic program description using the Refine records skill, if the Now Assist for SPM application is installed.
State	Current working state of the strategic program.
Initiative	Initiative that this strategic program is associated to.
Owner	User assigned to this strategic program.
Percent complete	Percentage of work completed for this strategic program.
MoSCoW	Priority of this strategic program based on its importance. The available options are: • **1 - Must have** • **2 - Should have** • **3 - Could have** • **4 - Won't have**
Work notes	Notes to capture the updates and discussions on the strategic program as the work progresses.

Details section of the Strategic program form

Field	Description
Approved start date	Approved start date for this strategic program.
Approved end date	Approved end date for this strategic program.
Actual start date	Actual date on which the work for this strategic program has started.
Actual end date	Actual date on which the work for this strategic program is complete.
Priority	Priority of this strategic program.
Business capabilities	Business capabilities of this strategic program.
Business application	Business application that this strategic program is related to.

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Details section of the Strategic program form (continued)

Field	Description
Other impacted business applications	Business applications that this strategic program has an impact on.

Business case section of the Strategic program form

Field	Description
Overview	Business case overview of this strategic program.
Background	Background for this strategic program.
Limitations	Applicable limitations to this strategic program.
Approach	Planned approach to work on this strategic program.
Benefits	Business benefit from this strategic program.

Financials section of the Strategic program form

In this section, capture financial details for this item such as cost, CapEx, OpEx, benefit, ROI, and other estimates.

Field	Description
Planned cost	Planned cost to take up this strategic program.
Planned capEx	Planned capital expenditure for this strategic program.
Planned opEx	Planned operational expenditure for this strategic program.
Planned benefit	Planned benefit from this strategic program.
Actual benefit	Actual benefit achieved from this strategic program.
Actual cost	Actual cost on this strategic program.
Actual capEx	Actual value of capital expenditure for this strategic program.
Actual opEx	Actual value of operational expenditure for this strategic program.
Planned ROI	Planned return of investment for this strategic program.

Related topics

- Create planning items from the roadmap view in Strategic Planning Workspace
- Add planning items to Prioritization page of Strategic Planning Workspace

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Table map form

Understand the fields of the table map form. This form is used to create a new custom table map for any record to integrate with Agile Development 2.0, SAFe, and PPM.

table map form

Field	Description
Alignment Integration	Specifies the Alignment integration type. The value is **ServiceNow Internal** by default.
Execution table	Table in Agile Development 2.0, SAFe, or PPM that needs to be mapped with a table in Strategic Planning. For example, Defect [rm_defect].
Alignment table	Table in Strategic Planning that needs to be mapped with a table in Agile Development 2.0, SAFe, or PPM. For example, Milestone [sn_milestones_milestone].
Milestone table map	This field is relevant only for Project [pm_project] table map. It is a reference to the new Milestone table map (sn_milestones_milestone) for integrating project milestones from Project Portfolio Management workspace to Strategic Planning. For all the other table maps, the milestone table map field is not available.
Execution table filter	Filter condition to retrieve the relevant records from PPM, Agile Development 2.0, or SAFe. For example, Portfolio is HR or Active is True.
Alignment table filter	Filter condition to retrieve the relevant records from Strategic Planning.
Active flag	Ensures that the table map sync is active. This field is checked by default.
Sync attachments	Ensures that the attachments are synced between the applications. This field is checked by default.

Target automation script for benefit plans

Use the predefined Benefit Plans script as a target source to automate the actual value of your targets from the benefit plans of relevant work items.

Use the following predefined benefit plans script to configure the target source for your targets. The script fetches the required data for monetary or non-monetary benefit plans and updates the actual value for the target. You can use this script as is or you can also modify it according to your requirement. You can also create context variables and configure them for this target source (Benefit Plans).

```
result = '';
var benefitPlans = new
 GlideRecord(sn_gfa.GFAdvancedConstants.BENEFIT_PLAN_TABLE);
benefitPlans.addQuery('sys_id', 'IN', benefit_plan);
benefitPlans.query();
```

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```
var nonMonetaryBenefitSum = 0;
var monetaryBenefitSum = 0;
var hasMonetary = false;
var hasNonMonetary = false;
while (benefitPlans.next() && !(hasMonetary && hasNonMonetary))
 {
    if (!gs.nil(benefitPlans.getValue('currency'))) {
        monetaryBenefitSum +=
 parseInt(benefitPlans.getValue('actual_benefit'));
        hasMonetary = true;
    } else {
        nonMonetaryBenefitSum +=
 parseInt(benefitPlans.getValue('nm_actual_benefit'));
        hasNonMonetary = true;
    }
}

if (hasMonetary && hasNonMonetary)
    gs.addErrorMessage(gs.getMessage('The Benefit Plan list can
 contain either monetary or non-monetary benefit plans.'));
else
    result = hasMonetary ? monetaryBenefitSum :
 nonMonetaryBenefitSum;
```

Target Breakdown form

Use the Target Breakdown form to track and measure the progress of the target breakdown and its goal.

Target Breakdown form

Field	Description
Breakdown period	Period of the target breakdown.
Parent breakdown	Year of the target breakdown.
Target	Parent target of the target breakdown.
Status	Status of the target breakdown. The status indicates whether the target breakdown is likely to be completed by the planned end date.
Breakdown	Breakdown interval specified in the parent target.
Planned target	Target value for the target breakdown.
Actual	Actual value for the target breakdown.
Remark	Remark entered for business justification when updating the actuals.

Target form

Use the Target form to track and measure the progress of the goals.

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Note:
For ESG Workspace and Strategic Planning users, to view the other fields that aren't added to the default view or your custom form view on the form in the workspace, configure the default or custom form layout. For information on how to configure the form layout, see Configuring the form layout.

Target form

Field	Description
Name	Name of the target.
Goal	Name of the associated goal. This field is auto-populated when creating a target from the Targets related list on the Goal form.
Description	Brief description of the target.
State	State of the target: **Draft**, **In progress**, **Approved**, or **Complete**.
Status	Status of the target. The status indicates whether the target breakdown is likely to be completed by the planned end date.

Progress	Percentage of the target execution that is complete. The value is calculated automatically.
	
	If the **Type** field is set to **Maximize**, the progress value is calculated using the following formula:
	`Progress = (Actual value - Base value) / (Target value - Base value) x 100`
	
	If the **Type** field is set to **Minimize**, the progress value is calculated using the following formula.
	`Progress = (Base value - Actual value) / (Base value - Target value) x 100`
	
	For more information on how the progress value is calculated when the weight scale is defined, see Progress value calculation.

Impact on goal	A numerical value that represents the importance of the target relative to the other targets of the goal. If there are any subgoals present, they are also considered for relative weights and consequent progress calculation. By default, the value is **(1) Neutral**. The available options are: • **(0) No impact** • **(1) Neutral** • **(2) Moderate** • **(3) High** • **(4) Very high** • **(5) Maximum** **Note:** This field is available only when the **sn_gf.weighted_average_enabled** system property is set to **Yes**.

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Target form (continued)

Field	Description
Owner	Owner of the target. By default, the name of the user creating the target is populated.
Contributors	Users who contributes to the achievement of the target. By default, the contributors of the associated goal are populated.

Duration section of the Target form

Field	Description
Start date	Start date for the target. By default, the start date of the associated goal is populated.
End date	End date for the target. By default, the end date of the associated goal is populated.

Metrics section of the Target form

Field	Description
Unit of measure	Measure type for the specified value. Usage of the measure such as cost, time, and rate. The available measure types are stored in the Units [sn_gf_units] table. Unit of measure defines the type of the target as qualitative or quantitative. The available unit of measures for the quantitative target are **#**, **$**, **%**, and **Days**. The available unit of measure for the qualitative target is **Yes/No**.
Type	Target type that signifies the direction of achievement. • **Maximize**: The direction of the progress is toward the target value from the base value where the base value must be less than the target value. • **Minimize**: The direction of the progress is toward the target value from the base value where the target value must be less than the base value. • **Milestone**: Fixed type. Only the qualitative target values are allowed (that are set in the **Unit of measure** field for the target) to capture the achievement of the target. The **Milestone** option is applicable only for qualitative targets. The **Type** field becomes read-only with the value populated as **Milestone** for qualitative targets (when the **Unit of measure** field is set to a qualitative target value).

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Metrics section of the Target form (continued)

Field	Description
Start value	Start value of the target. The start value can also be considered as the present or current value. This field becomes read-only when a value is entered in the **Actual value** field. Clear the **Actual value** field to update a value in the **Base value** field. This field is available when the **Type** field is set to **Maximize** or **Minimize**.
Final target value	Final target value of the target. The target value should be aspirational and should challenge the teams. This field is available when the **Type** field is set to **Maximize** or **Minimize**.
Baseline reference	Past achievement of the target to provide reference for future performance. This value is only for reference purpose and not considered for target progress calculation.
Actuals to date	Actual value of the target at a given time. This field is available when the **Type** field is set to **Maximize** or **Minimize**.
Check-in frequency	Option to specify breakdown intervals for the target and how frequently the owner or contributor should update the actual value of the target. Breaking down the target into smaller periods helps you set a target for smaller periods and focus on the specific breakdown targets. The available options are **Daily**, **Weekly**, **Monthly**, **Quarterly**, and **Yearly**. Target breakdowns are automatically created when you set this field to any of the available options other than **None**. For more details on target breakdowns, see Target breakdowns in Strategic Planning. **Note:** The target breakdowns feature isn't supported for qualitative targets.
Target value distribution	Option to specify the target to be calculated cumulatively or non-cumulatively. The available options are **Split equally across the time period (non-cumulative)** and **Spread linearly across the time period (cumulative)**.

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Metrics section of the Target form (continued)

Field	Description
	This field is available only when the **Check-in frequency** field is set to any of the available options other than **None**.
Remark	Remark entered by the user for business justification when updating the actuals.
Check-in due date	Due date that the owner or contributor of the target must update the actual value of the target to.
Confidential	Option to restrict the access for this target record to the specific users populated in the **Allowed groups** and **Allowed users** fields. This field is available when the ESG Management application is installed and the *sn_grc.enable_record_confidentiality* property is enabled. This field is applicable only when the **Classification** field in the goal form of the target is populated as Environmental, Social, or Governance. The required role to configure this field is sn_esg.reader. **Note:** Irrespective of the target record set to confidential or not, the target progress value rolls up to its goal for calculating the progress value of the goal.
Allowed groups	User groups who can access the target record. This field is applicable only for the ESG Workspace users. Even though a user group is populated in this field, the users can access the confidential record only if the user group has the sn_esg.reader role. This field is available when the **Confidential** field is set to **true**.
Allowed users	Users who can access the target record. This field is applicable only for the ESG Workspace users. Even though a user name is populated in this field, the user can access the confidential record only if the user has the sn_esg.reader role. This field is available when the **Confidential** field is set to **true**.

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Metrics section of the Target form (continued)

Field	Description
Comments	Detailed comments for the target to facilitate collaboration.

Target Automation section of the Target form

Field	Description
Automate actual value	Option to enable the target automation feature for the target.
Actual value source	Target source table that the data is fetched from to auto-update the actual value of the target on the target's review due date. This field is available when the **Automate actual value** field is set to **true**.

Variables section of the Target form

This section appears based on the context variables available in the target source that is selected in the **Actual value source** field.

When you select Actual value source as Benefit Plans (predefined target automation script for benefit plans), the **Benefit Plan** field appears in this section, from which you can select the required benefit plans for automating the actual value of the target.

Note:
You can use the Benefit Plans custom script only when PPM Standard (Project Portfolio Management) is installed. If you can't find the benefit plan that you want to select, you can find and select the same from Heisenberg UI by navigate to **Enterprise Goal Management** > **Targets** and opening the Target form.

Target Source form

Use the Target Source form to create and configure a source for your targets so that the actual value of the target is auto-updated.

Target Source form

Field	Description
Name	Name of the target source.
Active	Option to activate this target source for use.
Type	Type of target source. Available options: • **Assessment/Survey** • **PA Indicator** • **Custom script**
Advanced	Enables the **Custom script** option for the target source type **Assessment/Survey** with the pre-defined script.

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Target Source form (continued)

Field	Description
	This field is available when the **Type** field is set to **Assessment/Survey**.
Assessment metric type	Assessment metric type for the target source. **Tip:** A context variable is automatically created for the target source if the field is populated with a metric type of Evaluation method = Assessment. This field is available when the **Type** field is set to **Assessment/Survey**.
Assessment metric category	Assessment metric category for the assessment metric type. This field is available when the **Type** field is set to **Assessment/Survey**.
Description	Brief description of the target source.
PA Indicator	PA Indicator for the target source. This field is available when the **Type** field is set to **PA Indicator**.
Breakdown	Breakdown for the PA Indicator. This field is available when the **Type** field is set to **PA Indicator**.
Custom script	Custom script to fetch the required data from any ServiceNow AI Platform table for the target source. This field is available when the **Type** field is set to **Custom**. Or, when the **Type** field is set to **Assessment/Survey** and the **Advanced** field is set to **true**.

UX List Category form

Learn about the fields of the UX List Category form. Use this form to create additional categories for lists in the Lists menu of Strategic Planning workspaces.

Field	Description
Title	Display name of the category in the workspace.
Application	Application scope. Ensure that this is set to **Portfolio Planning**.
Order	Order in which this category is displayed in the workspace.
Active	Option to enable the display of this category in the workspace.
Description	Brief description of the category.
Configuration	Configuration that the category is referencing. By default, this field is set to **APW List Menu Configuration**.

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Related topics

Customize Lists in Strategic Planning Workspace

UX List form

Learn about the fields of the UX List form. Use this form to create additional lists in the Lists menu of Strategic Planning workspaces.

Field	Description
Title	Display name of the category in the workspace.
Application	Application scope. Ensure that this is set to **Portfolio Planning**.
Order	Order in which this category is displayed in the workspace.
Category	Category that this list would be displayed under, in the workspace.
Active	Option to enable the display of this category in the workspace.
Table	Source table for the list.
Configuration	Configuration that the category is referencing. By default, this field is set to **APW List Menu Configuration**.
Conditions	Conditions to filter the records of the source table.
Fixed query	Current fixed query conditions applied to the list.
Columns	Columns of the table that must be displayed in the list in the workspace.
Group by column	Attribute that would be used to group the list of records by.
View	View to determine which columns are displayed in the list in the workspace. If you select a view, the **Columns** field is disabled.

Related topics

Customize Lists in Strategic Planning Workspace

View rule form

Learn about the fields of the view rule form. Use this form to define workspace view rules for the form views of new planning item types in Strategic Planning.

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New View Rule form

Field	Description
Name	A unique name to identify the rule for your planning item. For example, **new_pi_type-alignment-planner**.
Application	This field is automatically set to Portfolio Planning based on your scope. If this field shows a different value, then ensure that your ServiceNow instance is in Portfolio Planning scope.
Table	Select the planning item table that you created.
View	Select one of the following: • APW Default • Default

Related topics

Create workspace view rules for new planning item forms in Strategic Planning

Widget association form

Use these form fields to associate a widget with project table and view it on financials.

Widget association form

Field	Description
Association ID	Record to associate to the widget. Use the lookup icon to identify and select tables. To access the relevant records, select **Table [sys_db_objects]** from the Table name list and **Investment** from the Document list.
Association table	Table to associate to the widget. You must select Table [sys_db_objects] from the list.
Widget	Unique name of the widget.
Order	Position of the widget in relation to other widgets in the **Financials** tab of the Project Workspace. Widgets appear in numeric order with the smallest number listed first.
Display on card	Option to display the widget in the **Financials** tab.

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Widget association form (continued)

Field	Description
Include by default	Option to show the widget by default in the **Financials** tab.

Widget New Record form

Use these form fields to create a new widget for your project administration.

Widget form

Field	Description
Name	Unique name for the widget.
Scripted	Option for indicating the value on the widget is from a code script. By default, this option is selected and is read-only.
Show Label	Option for displaying either the label or the color indicator. If you clear the check box, the **Color** field appears and you can set the color.
Active	Option for indicating the status of the widget. Only active widgets can be shown on the **Financials** tab of the Project Workspace.
Parent widget	Widget that is the parent of the current widget. The current widget displays in the Child widgets related list of the selected widget. You can add a maximum of three child widgets for a parent widget.
Formatter required	Option for specifying whether a currency formatter is required for the widget.

Script	Code script that returns a requested metric value that is displayed on the widget.
	
	In the script, use the context and filter objects. The context object contains all of the project financial fields, such as capex_costs, opex_costs, and budget_cost.
	
	The following sample script returns the Estimate At Completion metric value of a project to appear on the widget.
	
	`var context = JSON.parse(context);`
	`var filter = context.filters;`
	
	`var now_GR = new GlideRecord('pm_project');`
	`gr.addEncodedQuery(filter['pm_project']);`
	`gr.query();`
	`if(gr.next())`
	`gr.getValue('forecast_cost');`
	`Collapse`

Short description	Description of the widget.

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Enterprise Agile Planning in Strategic Planning

ServiceNow® Enterprise Agile Planning helps streamline communication and collaboration between teams, and drive coordination with diverse teams. Using an intuitive workspace, scale your Agile framework across the organization with flexible work and team structure configurations.

https://player.vimeo.com/video/1059081473?h=9af475911c&badge=0&autopause=0&player_id=0&app_id=58479

Enterprise Agile Planning (EAP) is available when you install the Strategic Planning application from ServiceNow Store using the SPM Pro license.

Get started

Explore  Learn about Enterprise Agile Planning features.	Configure  Set up Agile configurations, team levels, and work types.
Use  Build a backlog, plan program increments, and evaluate progress of assigned work.	Reference  Get details about EAP components like roles, tables, properties, forms, and lists.

Troubleshoot and get help

- Ask or answer questions in the Strategic Portfolio Management forum of ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Enterprise Agile Planning

Learn more about Enterprise Agile Planning (EAP) and review the benefits it can provide for your organization.

Enterprise Agile Planning benefits

Scrum leaders, product owners, portfolio managers, solution train engineers, and Agile release train engineers can enhance their Agile framework using the following EAP features:

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Benefit	Feature
Manage backlog and prioritize work.	Backlog
Create and plan activities such as creating PIs and Sprints, assigning work to teams, and scheduling this work into team-level iterations.	Backlog
Manage dependencies across teams and Agile release trains (ARTs).	Planning Board
Track activities and visualize progress.	Backlog
Collaborate real-time and asynchronously to discuss resolutions for blockers.	Backlog
Manage work and track progress efficiently for Kanban teams that don't operate in a regular cadence.	Backlog and Planning Board for Kanban-type teams
Flexibly configure team and work hierarchies.	Agile configurations in EAP
Store and manage all kinds of documentation for Agile teams and their work items from a centralized location.	Collaborate using Docs in EAP
Gain insights into the page content by summarizing it or improve content quality by refining it using Now Assist.	Summarize and refine Docs content in EAP using Now Assist for SPM
Save time and reduce manual effort by automatically generate stories for work items using Now Assist.	Generate stories for epics and features using Now Assist for SPM
Define goals at the iteration level or the team level iterations so that teams are aligned with the business value and have greater visibility into the work they contribute toward organizational objectives.	Iteration goals and work item goals in EAP
Analyze team progress, performance, and keep track of key metrics using preconfigured dashboards with data visualizations.	EAP Dashboards

Configuring Enterprise Agile Planning

Activate a configuration, add teams to your Agile structure, and define your planning calendars so that your team can get started with Backlog management and PI planning in EAP.

Configuration overview

The following tasks require the EAP admin (sn_apw_advanced.eap_admin) role.

1. Install Strategic Planning.

   Enterprise Agile Planning is available within the Strategic Planning workspace.

2. Assign the EAP roles to users. See Components installed with Enterprise Agile Planning.
3. Learn about EAP configurations, team level hierarchy, and work item type rollup.

   See Agile configurations in EAP.

4. (Optional) Create or update a configuration in EAP.
5. Activate an EAP configuration

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6. Define the agile structure by adding teams to your EAP configuration. See Define agile structure in EAP.
7. Configure dashboards for teams in your Agile structure.

The following tasks require the system admin role.

1. (Optional) Create additional planning calendar types. See Create a planning calendar in EAP.
2. Create calendar entries for iterations in EAP.
3. (Optional) If you want a different type of team or work item than those available by default, you can create custom types. See Create a custom team type in EAP and Create a custom work item type in EAP.

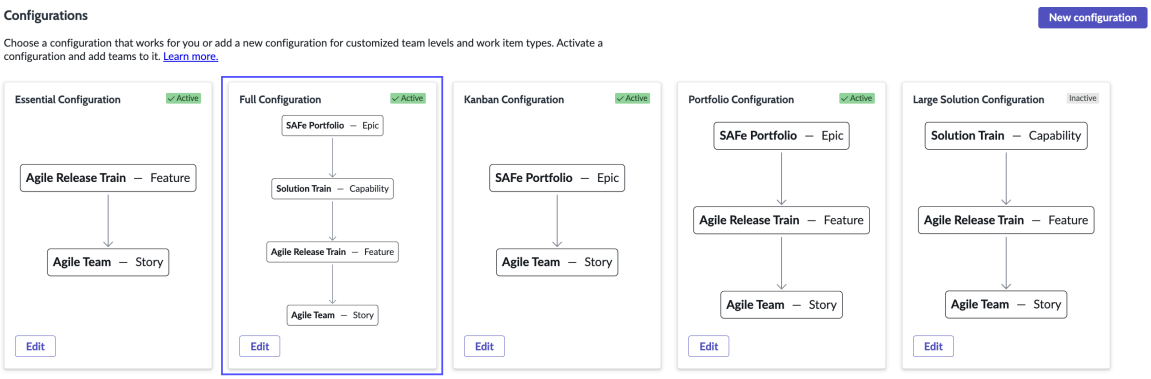
Agile configurations in EAP

Learn about the different SAFe configurations available in Enterprise Agile Planning (EAP) so that you can work with your admin to update the configuration according to your team's needs.

Default EAP configurations

A configuration includes the team level structure and work item types. The following Agile configurations, with the relevant team level, work item type, and planning calendar mapping, are available by default:

- Full Configuration
- Essential Configuration
- Large Solution Configuration
- Portfolio Configuration
- Kanban Configuration

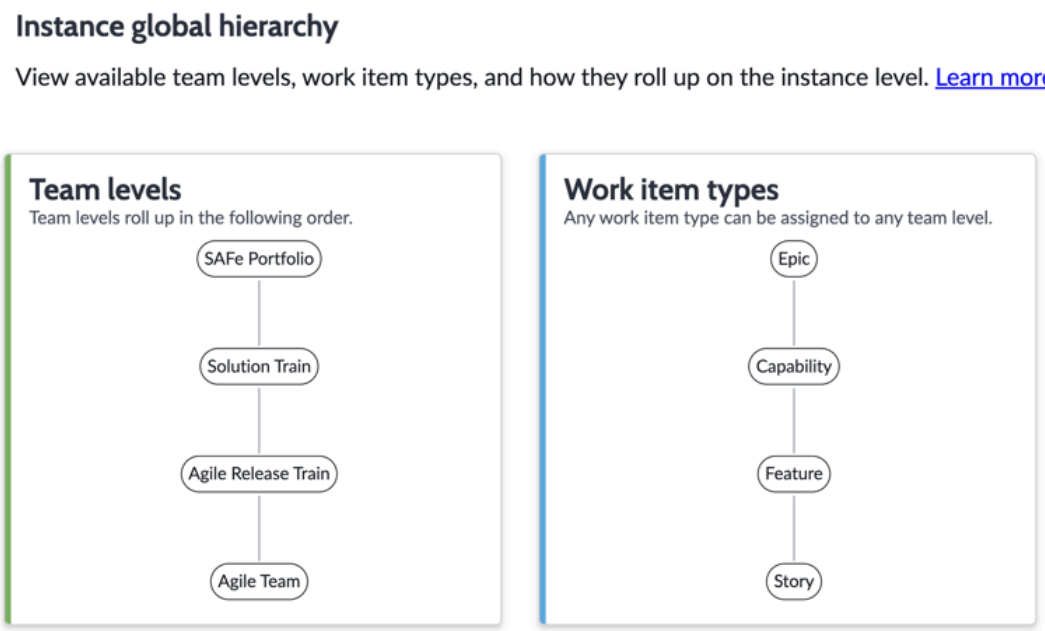


If you installed the Strategic Planning demo data, **Full Configuration** is activated for you. You can choose to activate a different configuration or define a new configuration.

For more information, see Activate an EAP configuration or Create or update a configuration in EAP.

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Default team level and work item hierarchy



- The EAP teams follow the hierarchy of Portfolio > Solution Train > Agile Release Train > Agile Team.
- The work item types follow the hierarchy of Epic > Capability > Feature > Story.

  However, while setting up a new configuration or editing an existing configuration, you can assign any work item type to any team level. For example, a Feature can be mapped to the Solution Train level or a Story can be mapped to the ART level. Based on how teams in your organization choose to operate, you can flexibly define or update the EAP configurations.

- All work items types used in EAP extend from the EAP Planning item [sn_align_core_eap_planning_item] table, which in turn extends from the Planning Item [sn_align_core_planning_item] table of Strategic Planning.
- The Story records are saved in the Story [rm_story] table.

  You can also create a custom work item type. See Create a custom work item type in EAP.

Create or update a configuration in EAP

Define your own Agile configuration or update an existing configuration in Enterprise Agile Planning (EAP).

Before you begin

Install Strategic Planning.

Set the Application Scope of your ServiceNow instance to Strategic Planning.

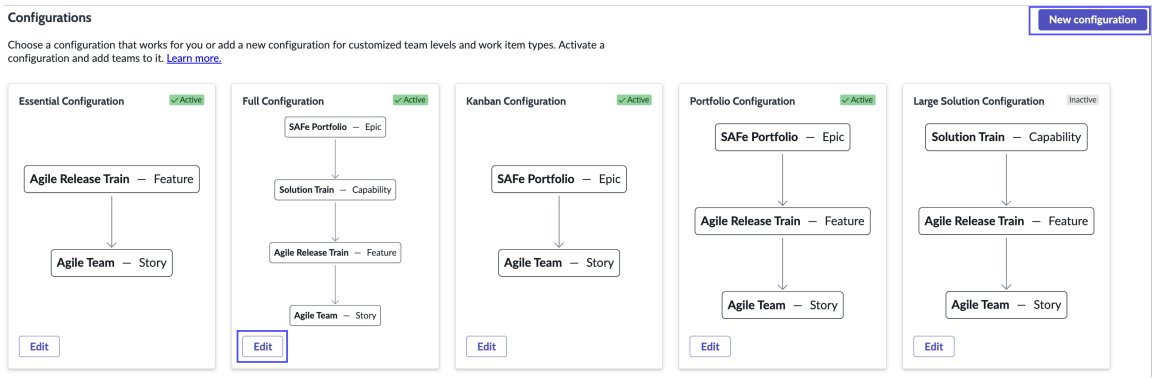
Role required: sn_apw_advanced.eap_admin

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace**.
2. From the **Settings** menu, select **Enterprise Agile Planning** > **Configuration**.
3. Choose to create a configuration or update an existing one.

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- To create, select **New configuration**.
- To update, select **Edit** from one of the available configurations.

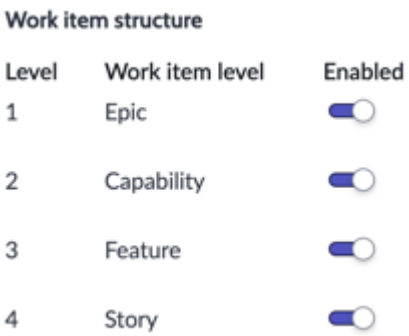


4. On the form, fill in or update the fields.

New configuration form

Field	Description
Configuration name	Name to identify the configuration.
State	State of the configuration. The default value for this field is **Inactive**. Change it to **Active** to make it available to use for your Agile teams in Enterprise Agile Planning.
Sync with Agile Development	Select this option to sync iterations such as Planning Intervals and Sprints with Agile Development 2.0. For more information, see Integration between EAP and Agile Development 2.0. If your team is of the Kanban type, you can leave this option unselected.

5. Select the work item types to be available within this configuration.
Only the work item types that you enable here are available for your Agile teams in the Backlog and Planning board.



6. Select the team levels that you want to have in your configuration.

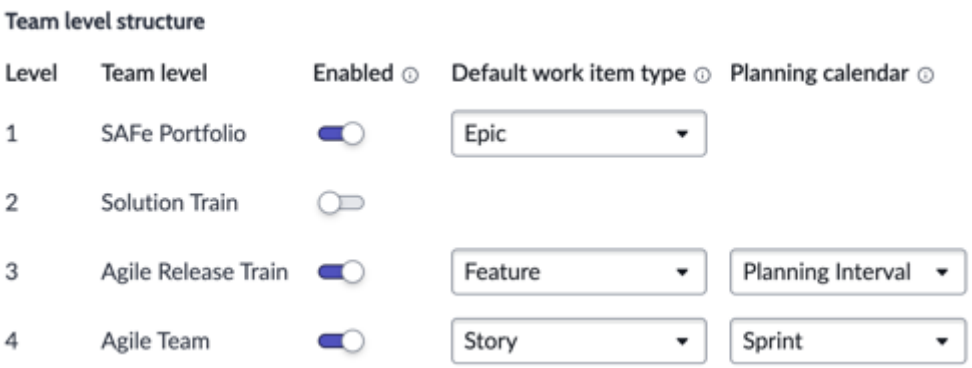
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Based on the team levels that you enable here, you can add only those entities to your Agile structure. For example, if you didn't enable **Solution Train** team level in the configuration, you can't add any solution trains to your Agile structure and you can't plan work for any solution trains from the Backlog or Planning board.

7. Select the default work item type to be available at each team level and its planning calendar.

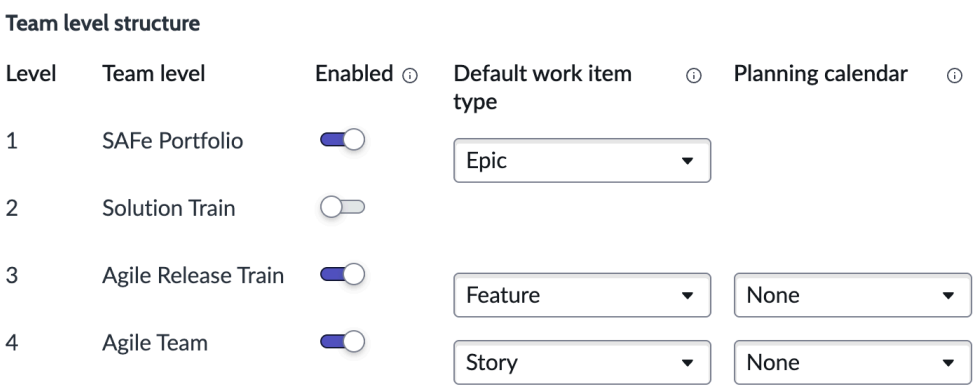
Scrum teams with a regular cadence

Planning calendars can be set only for Agile Release Trains (ARTs) and Agile Teams and the planning calendar types available by default are **Planning Interval** and **Sprint**. If you want a different calendar, create one. See Create a planning calendar in EAP.



Kanban teams

If your team operates in a Kanban style, which is a continuous workflow structure without any regular planning interval schedule, you can set the **Planning calendar** fields to **None**.



8. Select **Save**.

What to do next

- If you have updated the planning calendar selection for any active configuration that has teams associated with it, update the relevant dashboard configuration too. This action ensures that the metrics displayed for those teams are accurate. See Updating dashboards for planning calendar changes in EAP.
- Activate an EAP configuration

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Define agile structure in EAP

Add organizational entities and teams to an Enterprise Agile Planning (EAP) configuration so that users can plan work for them in the EAP Backlog and Planning Board.

Before you begin

Activate an EAP configuration.

Ensure that **Application Scope** of your ServiceNow instance is set to **Strategic Planning**.

Role required: sn_apw_advanced.eap_admin

About this task

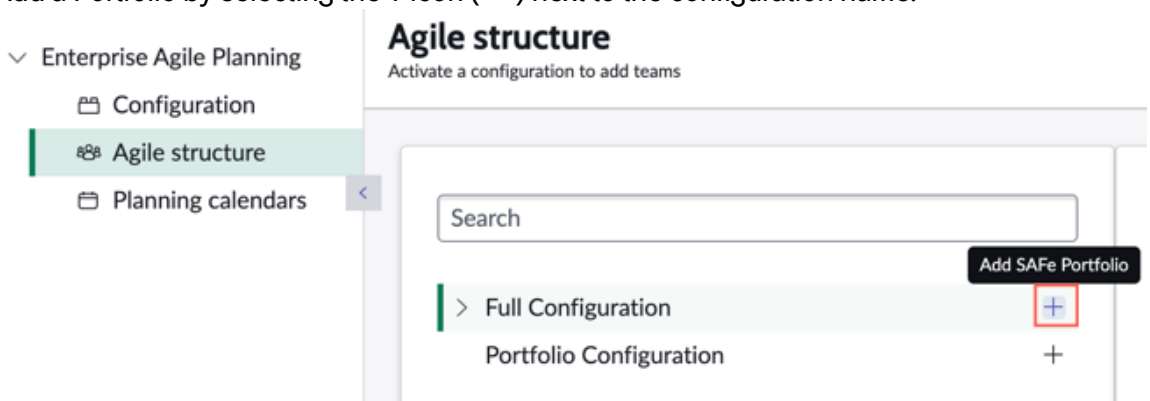
https://player.vimeo.com/video/1067467329?h=d09d828790&badge=0&autopause=0&player_id=0&app_id=58479

Based on your configuration, add entities such as Portfolios, Solutions Trains, ARTs, and Agile Teams to different team levels of the configuration.

Note:
This task is explained using **Full Configuration** as an example. Use these steps as guidance to add entities and teams to any other configuration in EAP.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace**.
2. From the **Settings** menu, select **Enterprise Agile Planning** > **Agile structure**.
3. Add a Portfolio by selecting the + icon ( ) next to the configuration name.

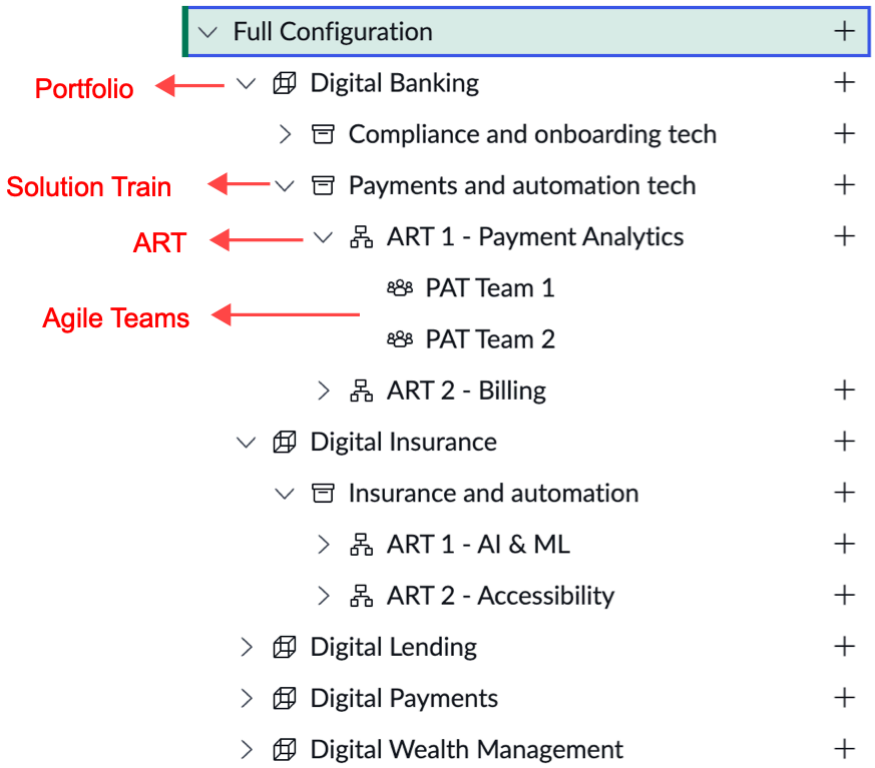


   a. On the SAFe Portfolio form, fill in details such as name, description and parent portfolio.
   b. Select **Submit**.
   c. Repeat the action to add as many portfolios as you need.
4. Repeat this action to add other entities to a Portfolio.
   - To a portfolio, add Solution Trains.
   - To a Solution Train, add Agile Release Trains (ART).

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- To an ART, add Agile Teams.

  The teams that you add as Agile Teams must be of the type **Agile**. If you need new teams or cannot find any existing teams, contact your admin. For more information, see Assignment groups in Agile Development 2.0.



Activate an EAP configuration

Activate a new or existing configuration in Enterprise Agile Planning (EAP) so that your users can start planning work for their teams.

Before you begin

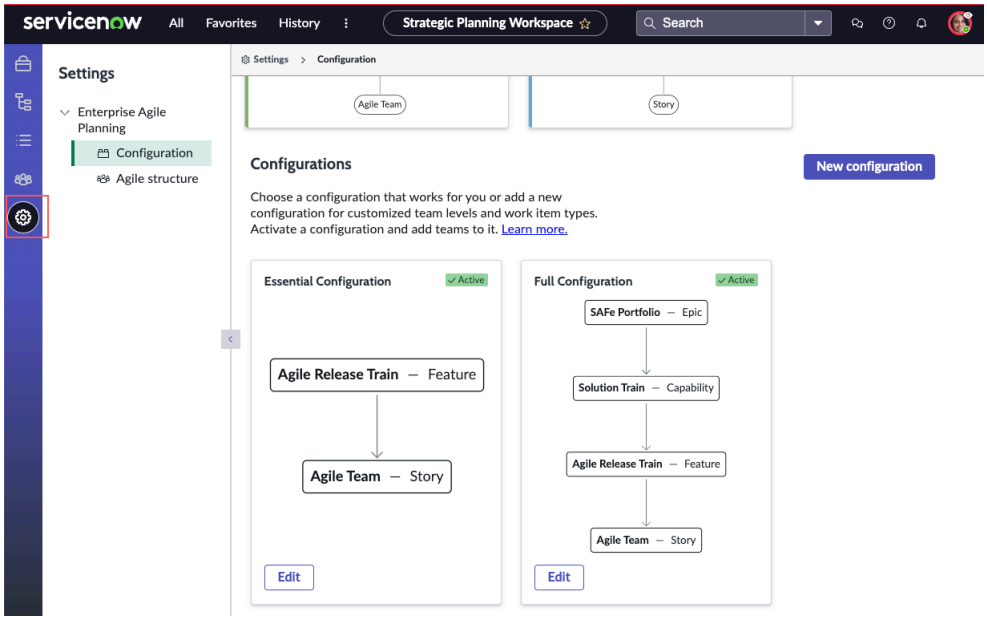
Set the Application Scope of your ServiceNow instance to Strategic Planning.

Role required: sn_apw_advanced.eap_admin

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace**.
2. From the **Settings** menu, select **Enterprise Agile Planning** > **Configuration**.

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3. Select **Edit** from one of the available configurations.
4. On the configuration form, set the **State** field to **Active**.
5. Select **Save**.

What to do next

Add teams to your configuration. See Define agile structure in EAP.

Configure display of other work item types in EAP Backlog and Planning board

Enable viewing different work item types in the Backlog and Planning board pages for EAP teams such as Portfolio, Solution Train, Agile Release Train, or Agile Team.

Before you begin

Ensure that you set the **Application Scope** in your instance to **Strategic Planning**.

Role required: admin

About this task

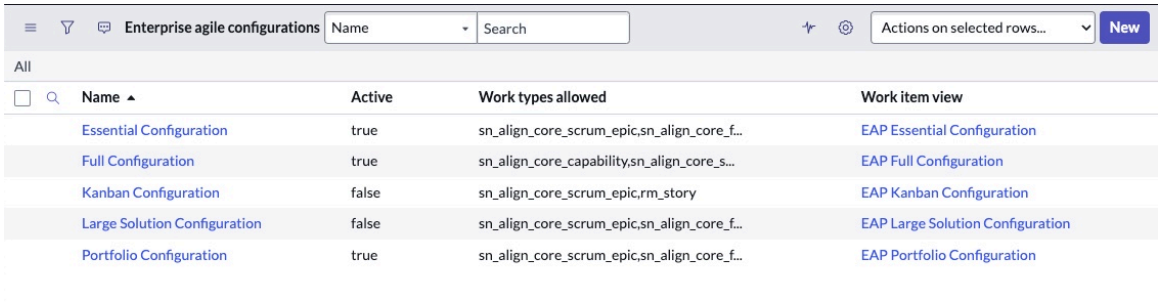
The Planning board for an EAP team shows only those work items that are enabled in its default configuration. For example, for a Solution Train with Full Configuration, the Backlog and Planning board show only Capabilities by default. If your product managers or team members want to switch between viewing other work item types such as Features, Epics, or Stories, you can enable it by updating the team-level configuration details.

This task provides guidance on updating the **Planning work types** or **Backlog work types** fields for your Agile teams in the Enterprise agile configuration details table [sn_apw_advanced_eap_configuration_detail].

Procedure

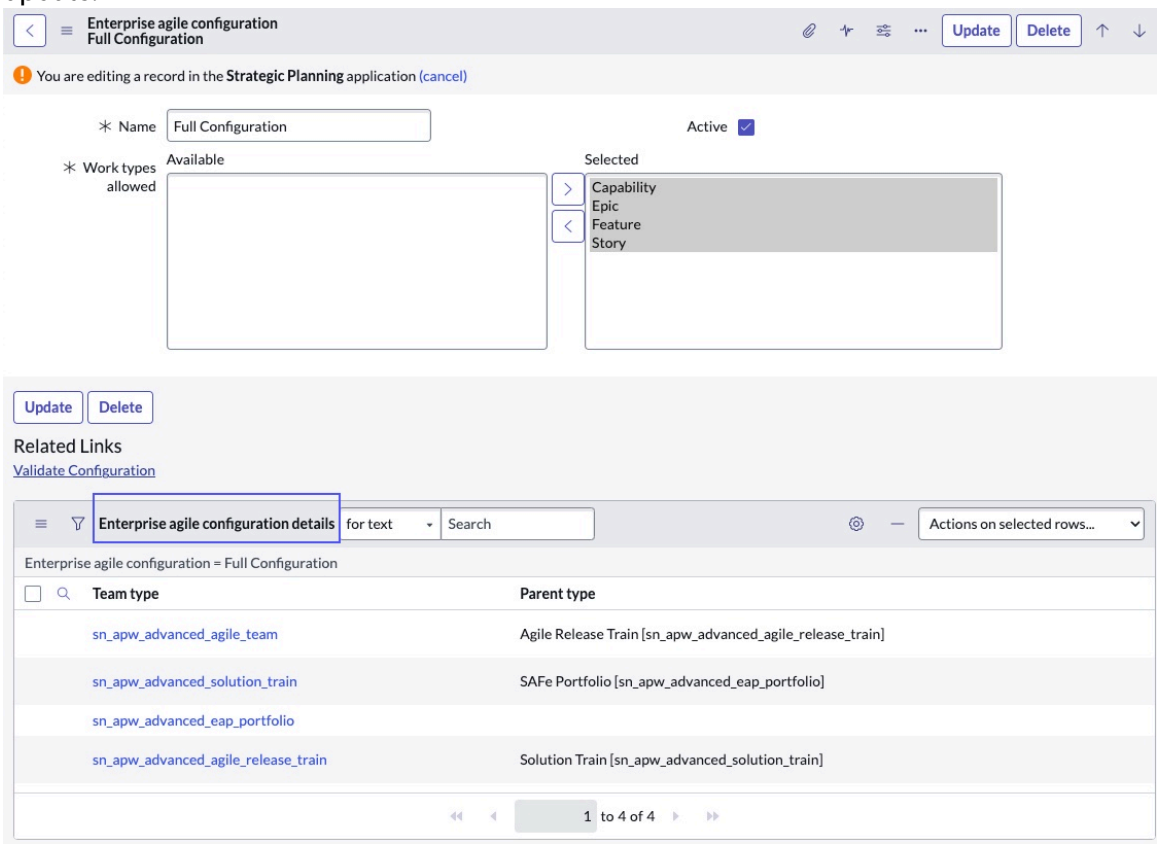
1. Navigate to **All** > **Enterprise Agile Planning** > **EAP Configurations**.
2. Select a configuration that you need to update the work item type selections for.

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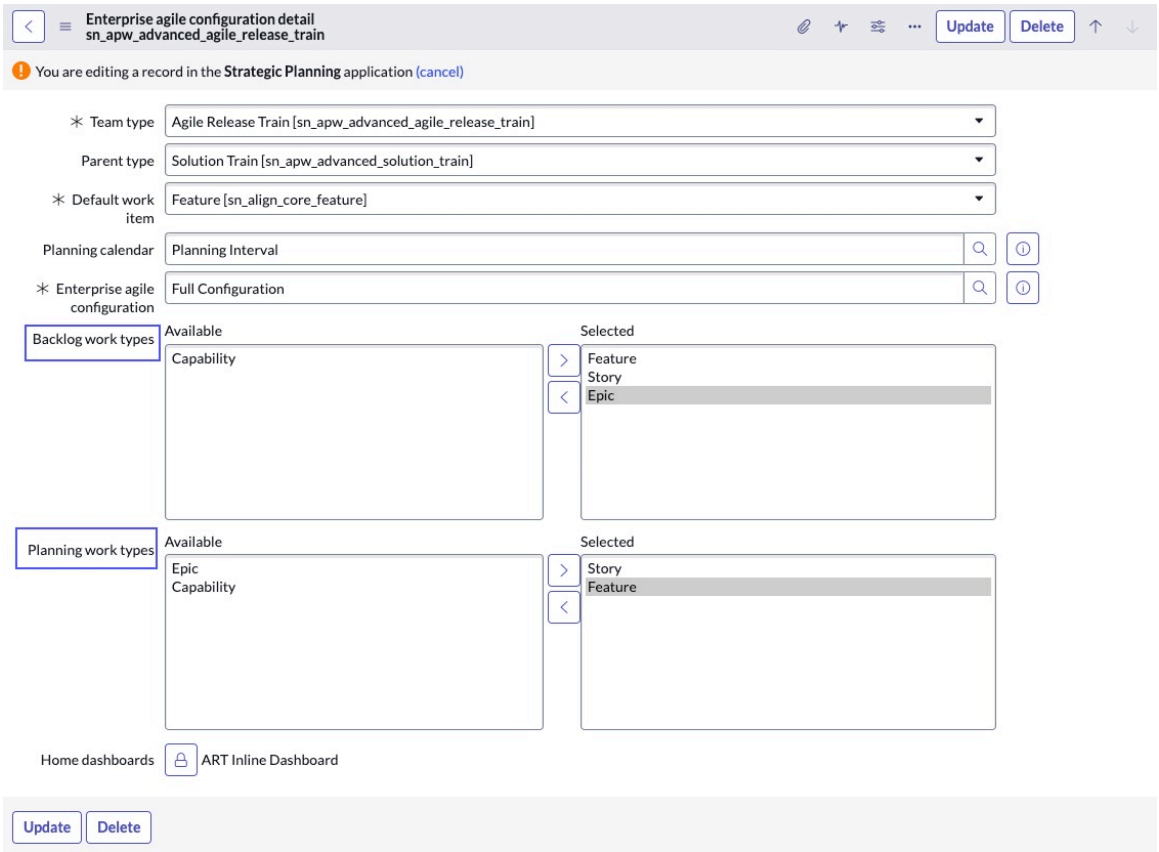
s

3. In the Enterprise agile configuration details related list, select the team level that you want to update.



4. Update the work types in the following fields.
   - **Backlog work types** to enable viewing multiple work item types in the Backlog page.
   - **Planning work types** to enable viewing multiple work item types in the Planning board page.

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5. Select **Update** to save your changes to the form.
6. Repeat steps 3-5 to enable multiple work types for other team levels.

Related topics

Manage team backlog in EAP

Perform PI planning in EAP

Configure the display limit of iterations in EAP Backlog

Create a system property to modify the limit on the number of iterations displayed for an EAP Team in its Backlog in Enterprise Agile Planning (EAP).

Before you begin

Ensure the application scope in your instance is set to **Strategic Planning**.

Role required: admin

About this task

By default, the number of iterations shown in the Backlog page for an EAP Team is 6. If your organization's processes require more iterations to be displayed in the Backlog, create a system property *sn_apw_advanced.eap_backlog_iterations_limit* and update the display limit.

Procedure

1. Navigate to **sys_properties.list**.
2. Select **New**.
3. On the form, fill in the fields.

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System property form

Field	Description
Suffix	*sn_apw_advanced.eap_backlog_iterations_lim*
Type	Integer
Value	Desired maximum number of iterations in the Backlog

For information on the other form fields, see the field description table in Add a system property.

4. Select **Submit**.

Update epic methodology for an EAP configuration

Change the epic methodology of your Enterprise Agile Planning configuration to SAFe or Scrum based on your Agile workflow.

Before you begin

Set the Application Scope of your ServiceNow instance to Strategic Planning.

Role required: sn_apw_advanced.eap_admin or admin

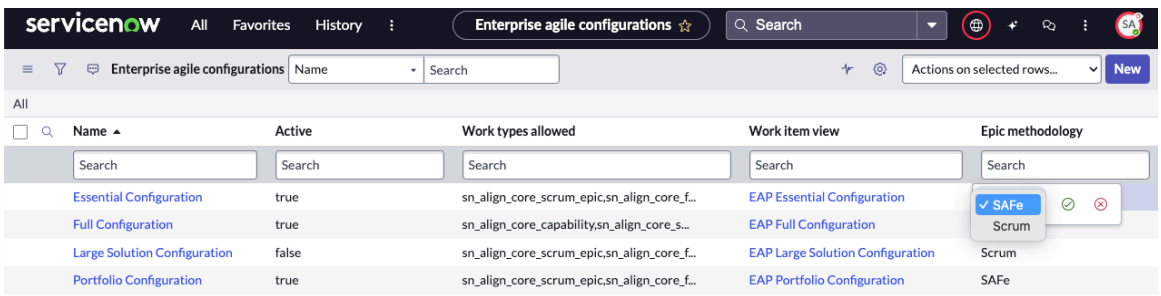
About this task

By default, the epic methodology for an EAP configuration is set to **SAFe** and all epics created for this configuration are SAFe epics. Based on how your Agile teams prefer to work, you can change the epic methodology to Scrum or retain it as SAFe.

> **Note:**
> The epic methodology for an EAP configuration can be updated only if there are no work items associated with it.

Procedure

1. Navigate to **All** > **Strategic Planning** > **Enterprise Agile Planning** > **EAP Configurations**.
2. From the list of Enterprise agile configurations, locate the one you want to change the methodology for.
3. Double-click the Epic methodology cell to change and update the value.



If the Epic methodology column is not displayed in your ServiceNow instance, personalize the column settings using the Update Personalized List icon ( ) from the list header.

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Create a planning calendar in EAP

Create any additional planning calendars that you use in your organization, such as Release, so that you can plan and track work in the calendar of your choice.

Before you begin
Role required: admin

About this task
Sprint and Planning Interval are the two planning calendars available by default. To create a different planning calendar, create one from the EAP Settings menu.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace**.
2. From the **Settings** menu, select **Enterprise Agile Planning** > **Planning calendars**.
3. Select **New**.
4. On the form, fill in the fields.

Enterprise agile calendar form

Field	Description
Name	Unique name for the calendar.
Label	Label of how this calendar shows up in the EAP application.
Plural label	plural form of this calendar's label.
Iteration type	Type that this calendar belongs to. Select one from **Planning Interval** and **Sprint**.
Parent	Parent calendar for this calendar. For example, Planning Interval is the parent for Sprint.
Description	A brief description of the calendar, its use case, and other details.

5. Select **Save**.

What to do next
Create entries for the newly created calendar. See Create calendar entries for iterations in EAP.

Override planning calendar in EAP

Flexibly change the planning calendar for your Agile Release Train (ART) or Agile Team by overriding the default calendar that is set during configuration of Enterprise Agile Planning.

Before you begin
Set the Application Scope of your ServiceNow instance to Strategic Planning.

Role required: sn_apw_advanced.eap_admin

About this task
The override calendar option EAP settings helps you change the planning calendar that your teams use in EAP. This way, teams can choose their own planning calendars.

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The new calendar takes effect after end date of the current calendar. If you want the calendar to take effect sooner or later, you must add or remove iterations to the current calendar.

The new calendar is automatically applied to child teams. For example, if an ART's planning calendar is changed, all child EAP teams associated with this ART must follow the new planning calendar.

This change is applied to only those ARTs that you update.

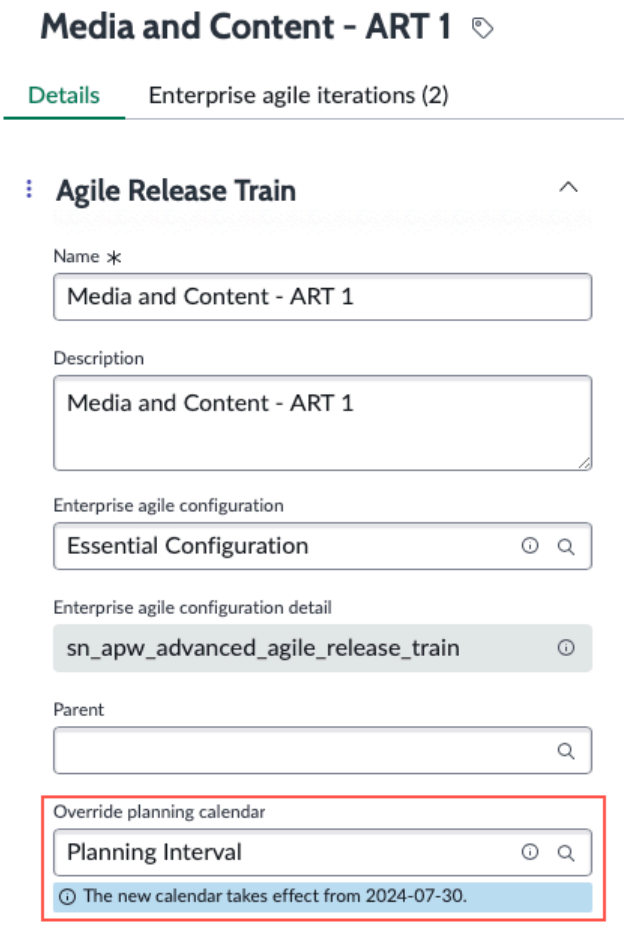
Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace**.
2. From the **Settings** menu, select **Agile structure** and navigate to your ART.
3. From the Details tab of your ART, select a value for the **Override planning calendar** field.
   The planning calendar that you select here must have calendar entries so that iterations can be created for this team and its child teams.
4. Select **Save**.
   The page shows the date from which the new calendar will override the existing calendar.

   For example, in the screenshot shown here, the new calendar **Planning Interval** is set to override an existing calendar on 2024-07-30. If you choose to go back to using your old calendar:

   - Before 2024-07-30, clear the **Override planning calendar** field.
   - After 2024-07-30, set your old calendar as the value for the **Override planning calendar** field.

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Once the new calendar comes into effect, the child teams will inherit it for all their future iterations. For Agile Teams, the **Override planning calendar** field is read-only and can't be changed independently of its parent ART.

Create calendar entries for iterations in EAP

Define timelines for planning calendars so that the teams can create their own iterations in the Backlog and Planning Board of Enterprise Agile Planning.

Before you begin

Role required: admin

About this task

This task is explained using Planning Interval (PI) and Sprint as an example. These are the calendars available by default in the workspace and PI is set as the parent for Sprint.

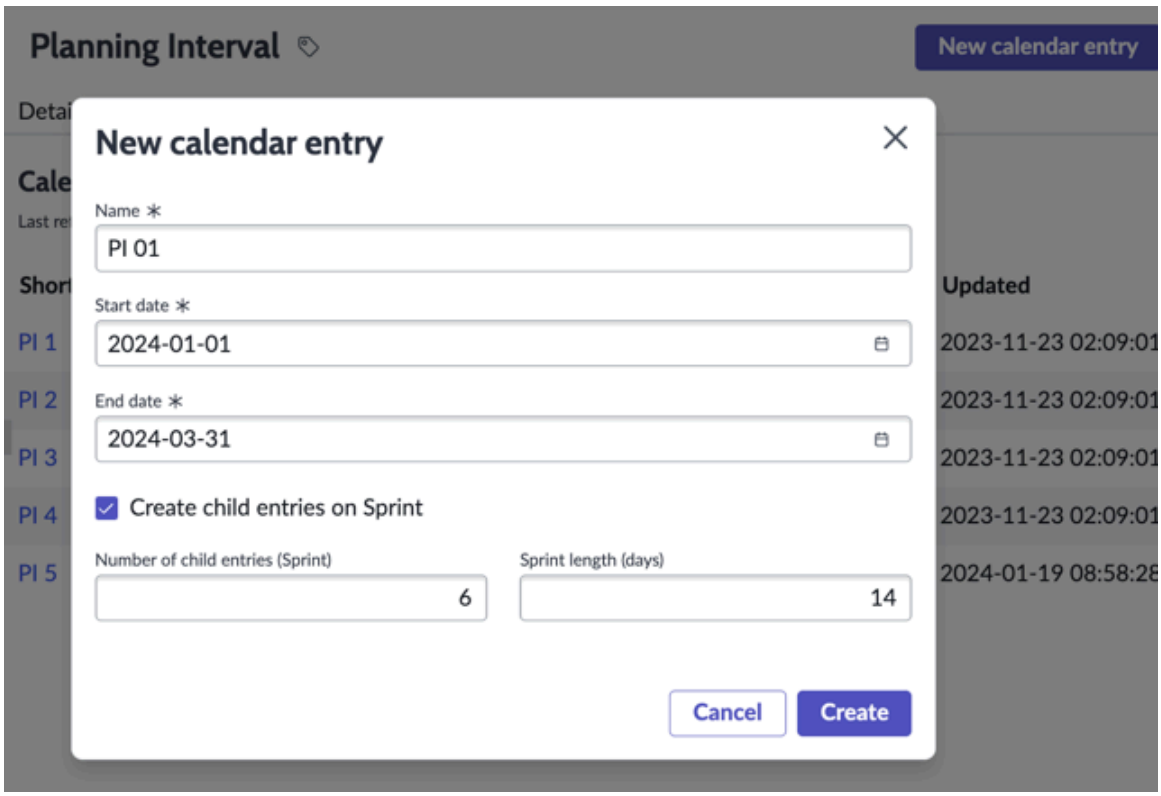
By the end of this task, you define the timeline for a PI and its child Sprints. The EAP teams can then create their own team-specific PIs and Sprints, within this defined timeline, in a naming convention of their choice.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace**.
2. From the **Settings** menu, select **Enterprise Agile Planning** > **Planning calendars**.
3. Select **Planning Interval** to create entries for it.
4. Select **New calendar entry**.

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5. On the form, fill in the name of the entry, and the start and end dates for the planning interval. For example, you're creating a PI for 01 January 2024 to 31 March 2024.
6. Create calendar entries for the Sprint calendar based on the PI start and end dates.
   a. Select **Create child entries on Sprint**.
   b. In the **Number of child entries (Sprint)** field, enter the number of sprints you want to create for this PI.
   c. In the **Sprint length (days)** field, enter the number of days your Sprint is made of.
   For the PI that spans from 01 January 2024 to 31 March 2024, you can create 6 Sprints with a length of 14 days each.

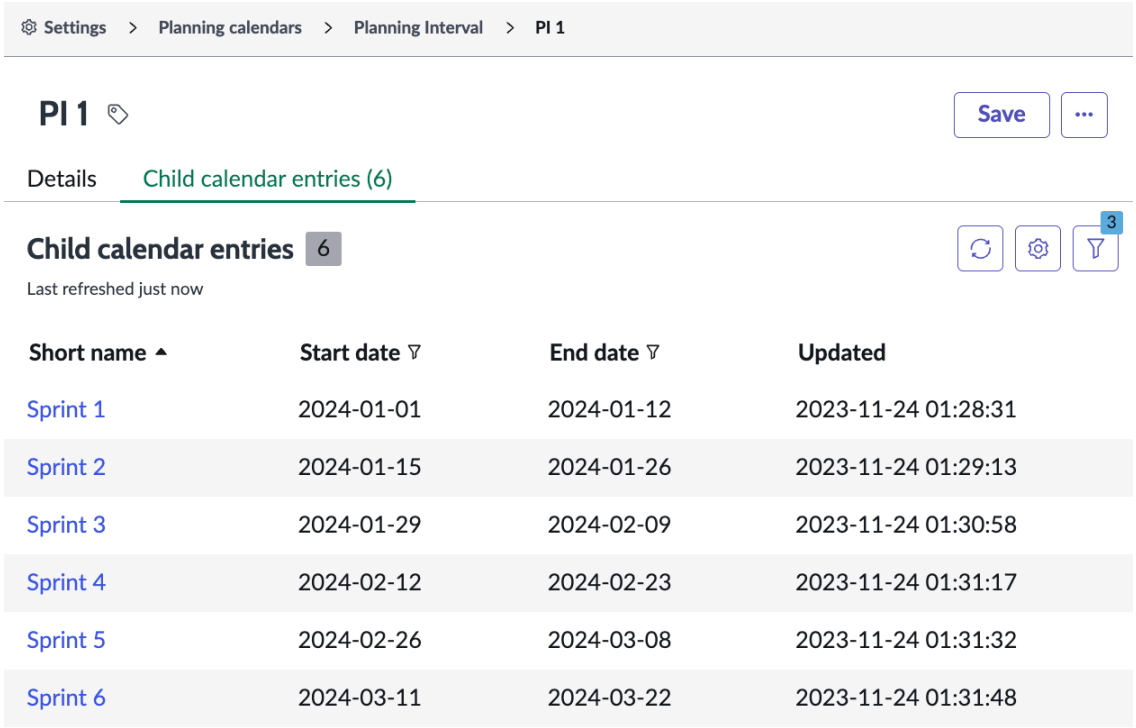


7. Select **Create**.

Result
A PI and its child sprints are created with the timelines that you defined. The EAP teams can create their own PI and Sprint iterations with their own naming convention.

Example:
PI 1 is created for 2024-01-01 to 2024-03-31. Within this PI, child six Sprints are created, each with a length of 14 days.

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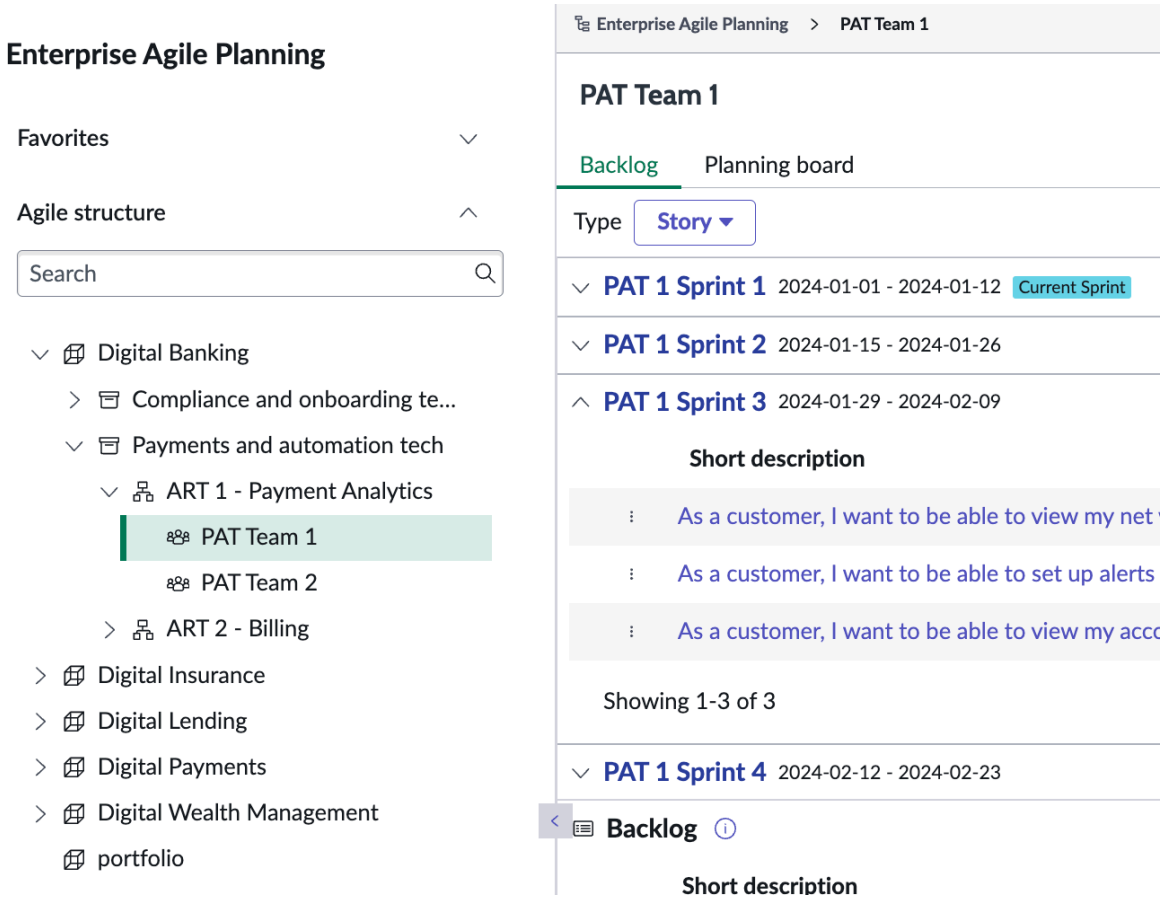
Short name	Start date	End date	Updated
Sprint 1	2024-01-01	2024-01-12	2023-11-24 01:28:31
Sprint 2	2024-01-15	2024-01-26	2023-11-24 01:29:13
Sprint 3	2024-01-29	2024-02-09	2023-11-24 01:30:58
Sprint 4	2024-02-12	2024-02-23	2023-11-24 01:31:17
Sprint 5	2024-02-26	2024-03-08	2023-11-24 01:31:32
Sprint 6	2024-03-11	2024-03-22	2023-11-24 01:31:48

Under the Digital Banking portfolio, the teams create their own ARTs and Sprints as follows:

- Payment Analytics ART creates two PIs: **Digi bank ST2 ART1 PI1** and **Digi bank ST2 ART1 PI2**.
- The Agile Teams PAT Team 1 and PAT Team 2 create sprints within these PIs:
  - PAT Team 1 creates **PAT 1 Sprint 1**, **PAT 1 Sprint 2**, and so on.
  - PAT Team 2 creates **PAT 2 Sprint 1**, **PAT 2 Sprint 2**, and so on.

The teams can use these PIs and Sprints to schedule their work.

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Create a custom team type in EAP

Create a custom team type to include in the Agile configurations for Enterprise Agile Planning.

Before you begin

Set the application scope in your instance to Portfolio Planning Core.

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Select **New**.
3. On the form, fill in the fields.

   For field information, see Team type form.
4. **Optional:** Deselect the **Create module** check box.
5. Select **Submit**.

Create a custom work item type in EAP

Create a custom work item type to include in the Agile configurations for Enterprise Agile Planning.

Before you begin

Set the application scope in your instance to Portfolio Planning Core.

Role required: admin

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Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Select **New**.
3. On the form, fill in the fields.

   For field information, see Work item type form.
4. **Optional:** Deselect the **Create module** check box.
5. Select **Submit**.

What to do next

For any new work item type tables, create relevant form views and list views. See Create or update form views for EAP work items and Create or update list view for EAP work items.

Create or update form views for EAP work items

Create or update form views for work item types so that the fields displayed in the Backlog and Planning board pages of Enterprise Agile Planning suit your team requirements.

Before you begin

Set the application scope in your instance to Portfolio Planning Core.

Role required: admin

About this task

Configuration for form views of work item tables determines the fields that are displayed in the workspace. For a work item type in EAP, the following are the necessary form views:

- EAP Default: Determines the fields to be displayed in the Full details page.
- EAP Preview: Determines the fields to be displayed in the side panel of the Backlog or Planning board.
- EAP New: Determines the fields to be displayed when creating a work item from the Backlog or Planning board.

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Filter the list of tables by using **EAP planning item** in the Extends table column.
3. Select a work item type that you created.
4. Select the **Layout Form** related link.
5. Create form views or update them.
6. Select **Save**.

What to do next

Create or update list view for EAP work items.

Create or update list view for EAP work items

Create or update EAP List View for work item types so that the columns displayed in the Backlog page of Enterprise Agile Planning suit your team requirements.

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Before you begin
Set the application scope in your instance to Portfolio Planning Core.

Role required: admin

About this task
Configuration for EAP List View determines the columns that are displayed for a work item on the Backlog page of the workspace.

Procedure
1. Navigate to **All** > **System Definition** > **Tables**.
2. Filter the list of tables by using **EAP planning item** in the Extends table column.
3. Select a work item type that you created.
4. Select the **Layout List** related link.
5. Create the EAP List View or update its configuration.
6. Select **Save**.

Configuring custom dashboards in EAP

Associate a custom dashboard to your Enterprise Agile Planning configurations to track and measure key metrics for your teams.

Dashboard configuration overview

Get visibility into metrics of your Agile teams such as progress, blockers, team performance trends, and others using dashboards. You can associate any of the default dashboards or create a dashboard with custom queries to view and track specific metrics for your Agile team.

EAP provides the following dashboards for different default configurations:

Default dashboards for EAP configurations

Team level	Full Configuration	Essential Configuration	Large Solution Configuration	Portfolio Configuration	Kanban Configuration
Portfolio	Portfolio Inline Dashboard	NA	NA	Portfolio Inline Dashboard	Kanban Portfolio Dashboard
Solution Train	Solution Train Inline Dashboard	NA	Solution Train Inline Dashboard	NA	NA
Agile Release Train	ART Inline Dashboard	ART Inline Dashboard	NA	NA	NA
Agile Team	• Agile Team Inline Dashboard • Agile Team Technical Dashboard	• Agile Team Inline Dashboard • Agile Team Technical Dashboard	• Agile Team Inline Dashboard • Agile Team Technical Dashboard	• Agile Team Inline Dashboard • Agile Team Technical Dashboard	Kanban Team Dashboard

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Default dashboards for EAP configurations (continued)

Team level	Full Configuration	Essential Configuration	Large Solution Configuration	Portfolio Configuration	Kanban Configuration
	• Agile Team Velocity Inline Dashboard	• Agile Team Velocity Inline Dashboard	• Agile Team Velocity Inline Dashboard	• Agile Team Velocity Inline Dashboard	

For more information about availability of these default dashboards with different configurations, see EAP reports and dashboards.

Important:
You can only copy and customize an Inline dashboard.

The following tasks require the admin or EAP admin (sn_apw_advanced.eap_admin) role.

1. Create or update a configuration in EAP.
2. Create a dashboard in EAP.
3. Add a tag to the EAP dashboard.
4. Associate the EAP read-only role to the dashboard.
5. Add EAP dashboards to an Agile configuration.
6. (Optional) Create implementation of a Scripted Extension Point in EAP.

Create a dashboard in EAP

Create a dashboard to track key metrics for your custom Agile configuration by creating a dashboard or duplicating and editing a default EAP dashboard.

Before you begin

Create or update a configuration in EAP

Role required: sn_apw_advanced.eap_admin or admin

Procedure

1. Navigate to **All** > **Platform Analytics** > **Dashboards**.
2. Create a dashboard or modify one of the default dashboards for your Agile configuration.
   - To create a dashboard, select **Create new dashboard**. For more information, see Create a dashboard with the in-line editor.
   - To modify an existing dashboard, create a copy of it so that you can the widgets that you need. For more information, see Duplicate a Platform Analytics dashboard.

     Note:
     The **Duplicate** option is available only for an Inline dashboard.

3. Add visualizations and widgets.

   For more information, see step 6 through 10 in Create a dashboard with the in-line editor.

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For information about the default indicators, see Enterprise Agile Planning Indicators.

4. Select **Save**.

What to do next
Add a tag to the EAP dashboard.

Add a tag to the EAP dashboard

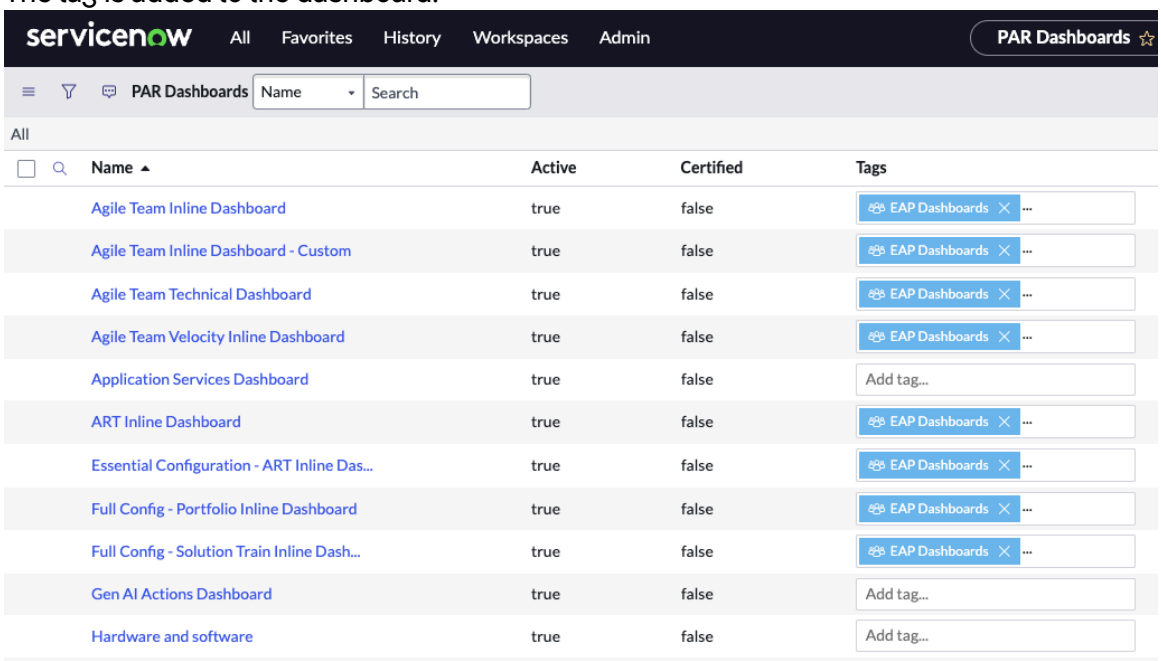
Add the EAP dashboards tag to identify your dashboard. The dashboards with tag appear in the reference qualified definition list, which helps you to add the dashboard to your configuration detail.

Before you begin
Create a dashboard in EAP.

Role required: sn_apw_advanced.eap_admin or admin

Procedure

1. Navigate to **par_dashboard.list**.
2. Add the Tags column to your view using the **Update Personalized List** option.
3. For the dashboard you want to add a tag to, enter **EAP Dashboards** in the Tags column. The tag is added to the dashboard.



What to do next
Associate the EAP read-only role to the dashboard.

Associate the EAP read-only role to the dashboard

Associate the EAP read-only (sn_apw_advanced.eap_read_only) role to the dashboard. The users with this role can view and edit the dashboard for the teams in their Agile configuration.

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Before you begin

- Add a tag to the EAP dashboard.
- Set the Application Scope of your ServiceNow instance to Strategic Planning.

Role required: sn_apw_advanced.eap_admin or admin

Procedure

1. Navigate to the PAR Dashboard Permissions [par_dashboard_permission] table.
2. Locate the dashboard that you created.
3. Double-click a cell in the Role column and then enter **sn_apw_advanced.eap_read_only**.
4. Select **Save**.
   The role is associated with the dashboard.

What to do next
Add EAP dashboards to an Agile configuration.

Add EAP dashboards to an Agile configuration

Add dashboards to your Agile configuration so that product managers or scrum team members can access them from the Home tab of their Agile teams in Enterprise Agile Planning workspace.

Before you begin

- Associate the EAP read-only role to the dashboard.
- Set the Application Scope of your ServiceNow instance to Strategic Planning.

Role required: sn_apw_advanced.eap_admin or admin

About this task
You can add single or multiple dashboards to your Agile configuration. If you are using a default configuration, a default dashboard is automatically associated with your Agile configuration. However, when you create a custom configuration, you must associate a dashboard with the configuration to view the metrics from selected data sources.

Procedure

1. Navigate to **sn_apw_advanced_eap_configuration_detail.list**.
2. Using the column options, group the records by Enterprise agile configuration.
3. For your Agile configuration, select an Agile Team to view its details.
4. From the **Home dashboards** field, add the dashboards that your team needs.
5. Select **Update**.
   The selected dashboard or dashboards are added to the **Home** tab of the selected configuration.

Create implementation of a Scripted Extension Point in EAP

Update the default Scripted Extension Point or create a scripted extension point using the default one as a template to filter the data displayed on the EAP dashboard.

Before you begin
Associate the EAP read-only role to the dashboard.

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Role required: admin

About this task

The **Scripted Extension Points** enable you to create a custom query to filter the information from different data sources. By default, each EAP configuration is associated with an extension point. Each extension point handles all the team types associated with it. You must create an implementation of the scripted extension point every time you create a new EAP configuration.

Important:
Perform this task only for a custom configuration or if you want to customize a default dashboard. This task is not required if you are using any of the default configurations.

Procedure

1. Navigate to **All** > **Scripted Extension Points**.
2. Search for and open the *EAPDashboardsEncodedQueryProvider (sn_apw_advanced.EAPDashboardsEncodedQueryProvider)* scripted extension point.
3. Select the **Create implementation** related link to create an implementation of this scripted extension point.
   The new implementation record form is shown.
4. Update the **Name** field of the newly created Implementation to a custom name of your choice. Ensure that you don't include any spaces in the name. For example, rename the implementation to **MyConfigEAPDashboardsEncodedQueryProvider**.
5. Select **Update**.
6. Open the *EAPDashboardsEncodedQueryProvider (sn_apw_advanced.EAPDashboardsEncodedQueryProvider)* scripted extension point.
7. From the Implementations related list, click the Class of your newly created implementation record to open it.
8. Update the **Script** field to include the following.
   - In the `getConfigId` function, enter the sys_id of your EAP configuration.
   - In the `fetchEncodedQueries` function, enter queries to filter the information for each level of your EAP configuration such as iteration ID, team type, and team ID.

     The following is an example script for the default Large Solution Configuration.

```
fetchEncodedQueries: function(teamType, teamId, iterationId)
 {
        switch (teamType) {
            case "sn_apw_advanced_agile_team":
                return {
                    rm_story: `iteration=${iterationId}`,
                    sn_apw_advanced_eap_iteration:
 `sys_id=${iterationId}`,
                    sn_gf_goal_m2m_relationship:
 `table_name=sn_apw_advanced_eap_iteration^entity_id=${iterat
ionId}`,
                    sn_apw_advanced_eap_iteration_db_view:
 `iter_eap_team=${teamId}`
                };
            case "sn_apw_advanced_agile_release_train":
                return {
```

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```
                    sn_align_core_feature:
 `iteration=${iterationId}`,
                    sn_apw_advanced_eap_iteration:
 `sys_id=${iterationId}`,
                    sn_gf_goal_m2m_relationship:
 `table_name=sn_apw_advanced_eap_iteration^entity_id=${iterat
ionId}`,
                    sn_apw_advanced_eap_iteration_db_view:
 `iter_parent=${iterationId}`
                };
            case "sn_apw_advanced_solution_train":
                return {
                    sn_apw_advanced_eap_iteration:
 `eap_team.parent=${teamId}`,
                    sn_align_core_capability:
 `eap_team=${teamId}^OReap_team.parent=${teamId}`
                };
            default:
                return {
                    sn_align_core_eap_planning_item:
 `iteration=${iterationId}`,
                };
        }
    },

    getConfigId: function() {
        return "e4e11e0977243110740fefc0aa5a99f9";
    },
```

9. Update.

Result

The next time you reload the Home tab for your EAP teams, the dashboard shows the filtered data according to the updates you made to the implementation.

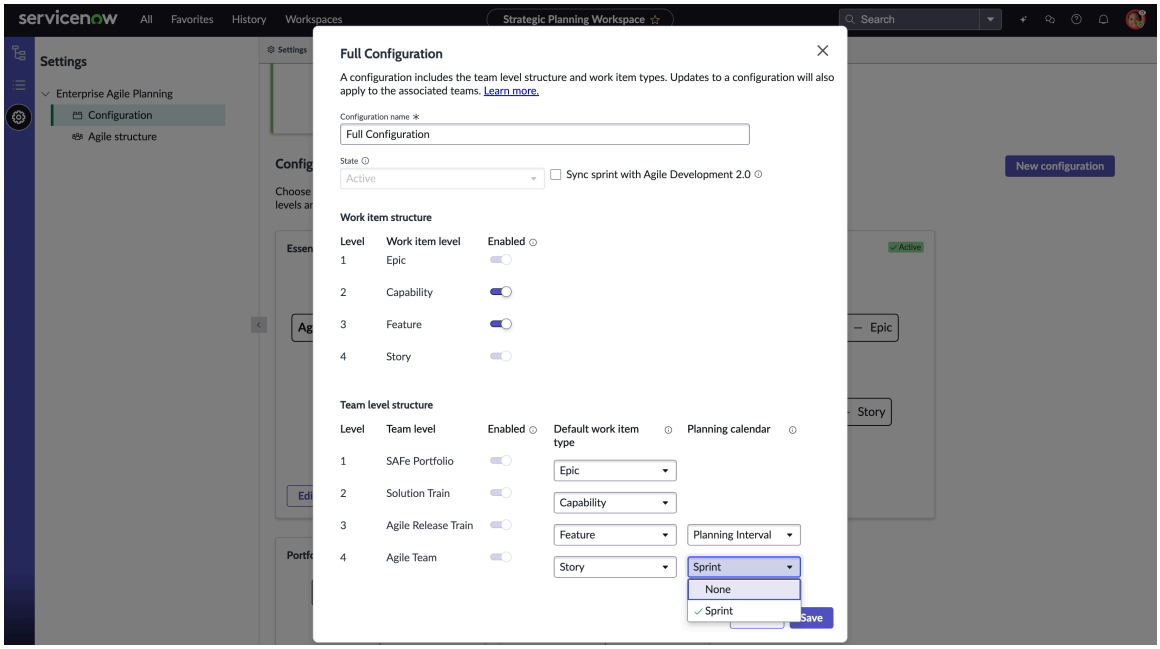
Updating dashboards for planning calendar changes in EAP

Update the EAP dashboard configuration whenever there are changes to the planning calendar for any currently active configurations in Enterprise Agile Planning.

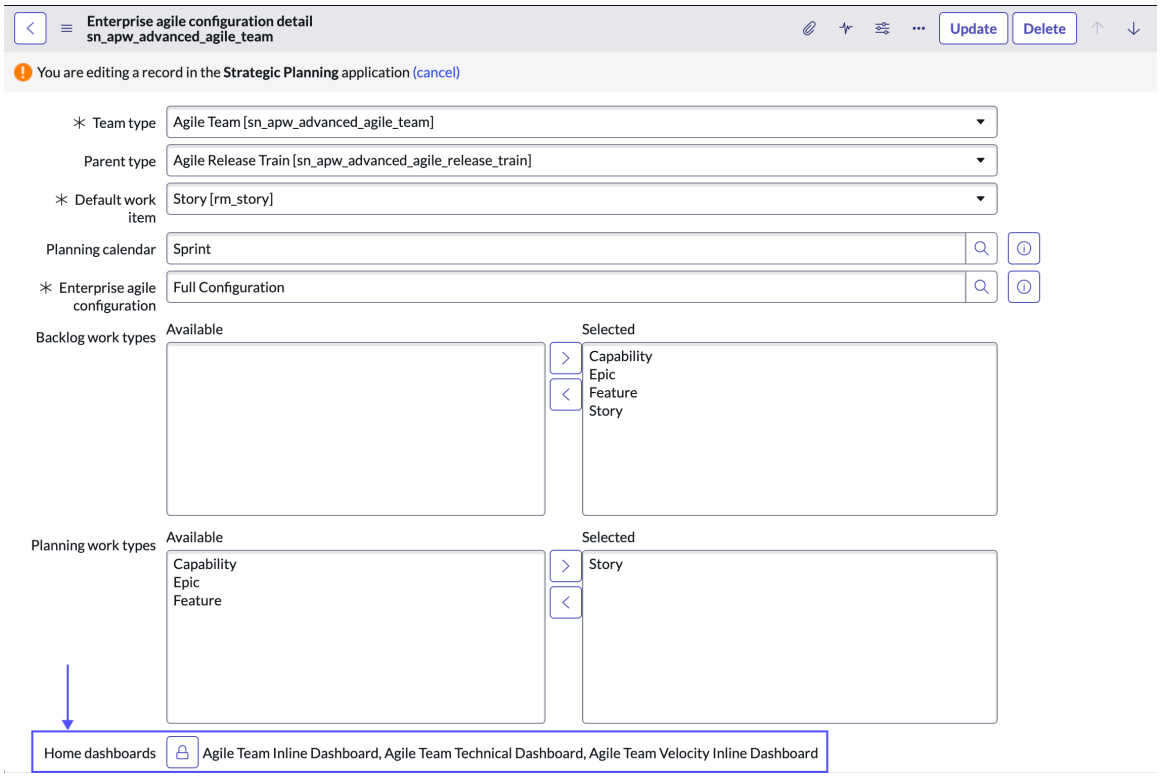
When your product managers update the planning calendars for an EAP configuration with active teams and work items, the reports on the Home tab for those teams are affected. As an admin, you must update the corresponding dashboards for this EAP configuration. This action ensures that the reports and metrics your teams see are accurate.

For example, the Agile Team's Planning Calendar value is updated from **Sprint** to **None** for a Full Configuration. Then, the Home tab should no longer display sprint-related reports such as Burnup or Burndown charts, Sprint velocity, and others.

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To ensure this change, you must configure new dashboards according to the latest planning calendar and replace the existing Agile Team dashboards of the Full Configuration with the new ones.



This procedure involves a series of tasks as listed here:

1. For the latest planning calendar, create a dashboard or duplicate the existing dashboard and add the reports that your teams want to have. See Create a dashboard in EAP.
2. Add a tag to the EAP dashboard.
3. Associate the EAP read-only role to the dashboard.

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4. Add the newly created dashboard to the EAP configuration that has the planning calendar change. See Add EAP dashboards to an Agile configuration.
5. (Optional) Create implementation of a Scripted Extension Point in EAP.

Migrating from SAFe to EAP

Learn about the process required For a successful migration of data from Scaled Agile Framework applications to Enterprise Agile Planning.

https://vimeo.com/showcase/11420435/embed

Guided Setup to migrate data from SAFe to EAP

Guided Setup provides a sequence of tasks to help you complete the required tasks on your ServiceNow instances. Navigate to **All** > **Strategic Planning** > **Enterprise Agile Planning** > **SAFe Migration Guided Setup**.

The following tasks are included in the guided setup.

SAFe to EAP migration tasks

1. Verify EAP configuration for migration from SAFe.

   Based on your existing SAFe configuration, verify that the right EAP configuration is activated in your instance and ensure that the right work types (Epic, Feature, and Story) are allowed for this configuration.

   For example, if you are a user of ServiceNow Essential SAFe application, you must activate the Essential Configuration in EAP and ensure that EAP Epic and Feature are allowed as work types.

2. Verify table, field, and choice mapping between SAFe and EAP.

   Verify that the tables, columns, choice fields, and custom tables of your SAFe application are correctly mapped to those in EAP.

   Note:
   By default, all columns of SAFe Story [sn_safe_story] and SAFe Scrum Task [sn_safe_scrum_task] tables are migrated to the Story [rm_story] and Scrum Task [rm_scrum_task] tables. To include or exclude any columns, see Modify columns to migrate from SAFe story and SAFe Scrum task tables to EAP.

3. Start migration of SAFe data to EAP.
4. Add **Agile Team** as the type for existing SAFe groups. See Add Agile Team type to SAFe groups for EAP migration.
5. Assign the EAP roles sn_apw_advanced.eap_read_only, sn_apw_advanced.eap_user, and sn_apw_advanced.eap_admin to your SAFe groups or to individual users in your teams.

   See Assign a role to a group or Assign a role to a user.

Verify EAP configuration for migration from SAFe

Ensure that the right EAP configuration which suits your current SAFe configuration is active and that the required work types are selected.

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Before you begin

Check the SAFe application (Essential SAFe or Portfolio SAFe) that is currently in use in your ServiceNow instance.

Role required: admin

About this task

https://player.vimeo.com/video/1049452534?h=ee0299eb63&badge=0&autopause=0&player_id=0&app_id=58479

Procedure

1. Navigate to **All** > **Strategic Planning** > **Enterprise Agile Planning** > **EAP Configurations**.
2. Activate the EAP configuration that you need and verify that the required work types are allowed.
   a. Open the EAP configuration record.
   b. Enable the **Active** field.
      - For Essential SAFe: Activate Essential Configuration.
      - For Portfolio SAFe: Activate Portfolio Configuration.
   c. In the **Work types allowed** field, ensure that **Epic**, **Feature**, and **Story** are added to the Selected list.
3. Save the form.

What to do next

Verify table, field, and choice mapping between SAFe and EAP.

Verify table, field, and choice mapping between SAFe and EAP

Before starting the migration from SAFe, verify that the default mapping of tables, fields, and column choices between Scaled Agile Framework applications and Enterprise Agile Planning is according to your requirements.

Before you begin

Verify EAP configuration for migration from SAFe.

Role required: admin

About this task

https://player.vimeo.com/video/1023012765?h=9fdc807e46&badge=0&autopause=0&player_id=0&app_id=58479

Procedure

1. Navigate to **sn_apw_advanced_safe_eap_mig_setup.list**.
2. Select the **SAFe to EAP migration** record.
3. From the Table Maps related list, verify the table mapping between SAFe and EAP.
4. Open each table mapping record to verify its field mapping.

   For example, open the **sn_safe_epic** record to see how the fields of SAFe epic are mapped to EAP epic.

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If you need to change a field mapping, open its record and update the fields.

5. From the Field Maps related list, open a choice column record to verify the choice mapping of the fields between SAFe and EAP.

   For example, in the **sn_safe_epic** table map, open the **status** field map record to see how the choices for the **Status** field are mapped between SAFe and EAP.

   If you need to change a field mapping, open its record and update the fields.

What to do next

- For SAFe Story [sn_safe_story] and SAFe Scrum Task [sn_safe_scrum_task] tables, all default columns are migrated to the Story [rm_story] and Scrum Task [rm_scrum_task] tables. To include or exclude any columns, update the *sn_apw_advanced.SAFeEAPStoryTaskMigrationAPI* script include. See Modify columns to migrate from SAFe story and SAFe Scrum task tables to EAP.
- Start migration of SAFe data to EAP.

Modify columns to migrate from SAFe story and SAFe Scrum task tables to EAP

For the SAFe Story and SAFe Scrum task tables, ensure that only the data from the necessary columns is migrated to Enterprise Agile Planning. By updating a Script Include, include or exclude any columns according to your requirements.

Before you begin

Verify table, field, and choice mapping between SAFe and EAP.

Role required: admin

About this task

https://player.vimeo.com/video/1020716174?h=3cf2011632&badge=0&autopause=0&player_id=0&app_id=58479

Procedure

1. Navigate to **All** > **System Definition** > **Script Includes**.
2. Search for and open the **sn_apw_advanced.SAFeEAPStoryTaskMigrationAPI** script include.
3. Follow the comments in the **Script** field to include or exclude any columns of the SAFe Story and SAFe Scrum Task tables.
4. Save the form.

What to do next

Start migration of SAFe data to EAP.

Start migration of SAFe data to EAP

Submit a SAFe-EAP migration request and start the migration of data between the tables of Scaled Agile Framework and Enterprise Agile Planning.

Before you begin

Role required: admin

About this task

https://player.vimeo.com/video/1049439810?h=256249f11c&badge=0&autopause=0&player_id=0&app_id=58479

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Procedure

1. Navigate to **All** > **Strategic Planning** > **Enterprise Agile Planning** > **SAFe Migration requests**.
2. Select **New**.
3. On the form, fill in the fields.

   For field information, see SAFe-EAP migration request form.

   Note:

   - Planning intervals, formerly known as program increments, can only be migrated one time per team. Planning intervals falling before the selected date in the migration request and those created after the migration is complete, cannot be migrated through the automated migration (Guided Setup).

     For example, submit migration requests in the sequence of PI 1 > PI 2 > PI 3 and so on.
   - If the composition of a SAFe ART has been changed any time after it is created, it is suggested to migrate only those PIs that have the current composition of the ART.
   - For a Portfolio SAFe migration, if a SAFe Epic is associated with SAFe Features but is not linked to any Portfolio, then this Epic will not be migrated by the automated migration.
   - Migration can be run multiple times for the same criteria. In such case, any newly created records will be migrated to EAP.
   - If changes are made to already migrated SAFe records, these changes will not be synched with the EAP records.

4. Select **Submit**.

   Important:
   Submitting the request does not trigger the migration. Open the submitted recorded from the SAFe Migration requests list and select **Start migration**.

Result

Monitor the progress of data migration:

- If the migration is successful, the Import Requests related list shows the details of the data migration such as failed count, insert count, and total count of records moved from SAFe to EAP.
- If the migration encounters any error, the Migration Errors related list shows the details of records that failed to migrate from SAFe to EAP.

What to do next

Add Agile Team type to SAFe groups for EAP migration.

Add Agile Team type to SAFe groups for EAP migration

Add **Agile Team** in the **Type** field of existing SAFe groups to so that these teams are visible for your EAP users in the workspace.

Before you begin

Role required: admin

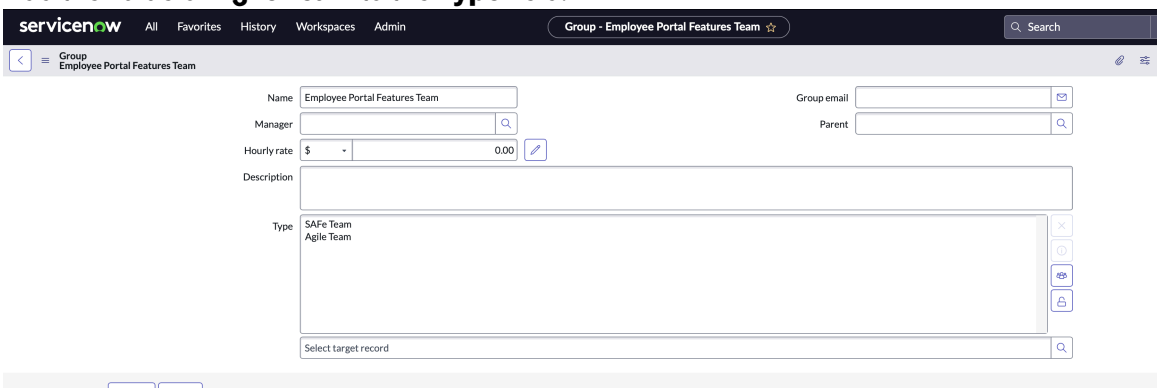
About this task

https://player.vimeo.com/video/1062964725?h=f69cc5c0e8&badge=0&autopause=0&player_id=0&app_id=58479

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Procedure

1. Navigate to **All** > **Scaled Agile Framework** > **SAFe Teams**.
2. Open a SAFe team record.
3. From the Additional actions menu, change the form view to Default view.
4. If the **Type** field is not visible, configure the form layout of the Default view to include it. For information on configuring the form layout, see Show or hide fields on a form.
5. Add the value of **Agile Team** to the **Type** field.



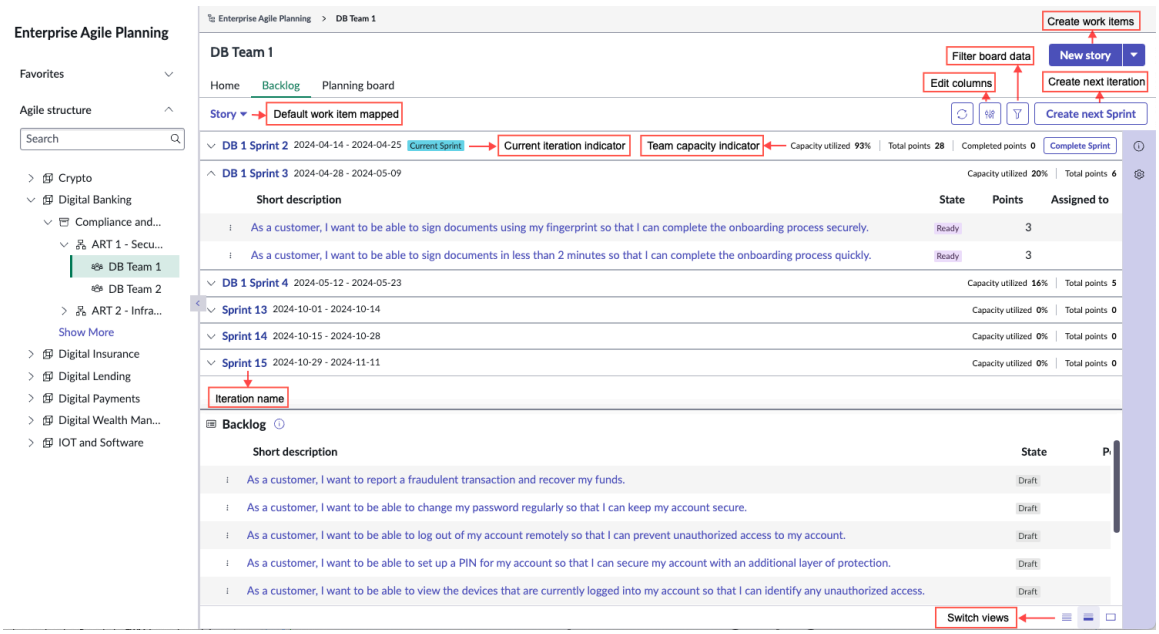
6. Repeat steps 3 through 6 for all SAFe teams that are to be migrated to EAP.

Using Enterprise Agile Planning

Manage your team backlog, plan for sprints and iterations, add dependencies, and collaborate using team-level and work item level Docs using Enterprise Agile Planning in the Strategic Planning Workspace.

Manage team backlog in EAP

Using the Backlog page of Enterprise Agile Planning, create, update, and prioritize work items. Additionally, schedule work items into iterations such as Planning Intervals (PI) or Sprints.



The following sections provide a brief overview of EAP Backlog and the actions that you can perform in it.

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Layout and default grouping

The layout of Backlog across different team levels such as Agile Team, Agile Release Train (ART), Solution Train, or Portfolio, remains the same. The change is in the way that the work items are grouped. As you go bottom to top in an Agile structure, the work assigned to the teams is grouped as follows:

Important:
The team hierarchy and the iterations within teams are based on your EAP configuration. The following information applies to the default Full Configuration.

- Agile Team: Grouped by Sprints.
- ART: Grouped by Planning Intervals.
- Solution Train: Grouped by child ARTs.
- Portfolio: Grouped by child Solution Trains.

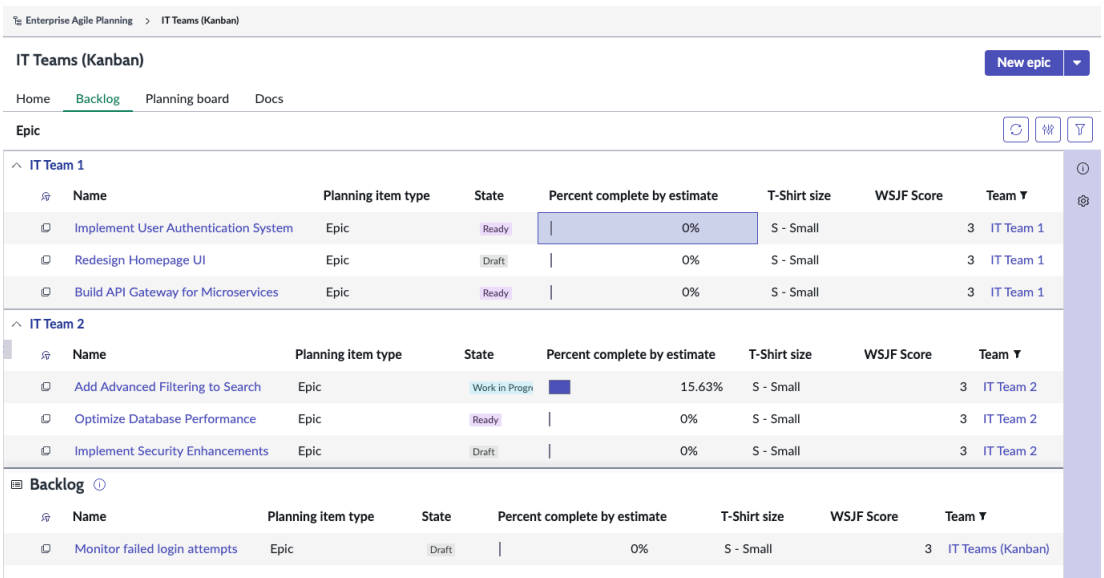
Any work item that doesn't fall into any of these groups is displayed in the Backlog section.

By default, the number of iterations that the Backlog page displays is set to 6. You can work with your admin to modify this number using a system property. For more information, see Configure the display limit of iterations in EAP Backlog.

Layout and default grouping for Kanban teams

The Backlog for teams using the Kanban configuration is grouped as follows:

- Portfolio: Assigned work items are grouped by child teams. Any work item that is not assigned to the child teams is displayed in the Backlog section.

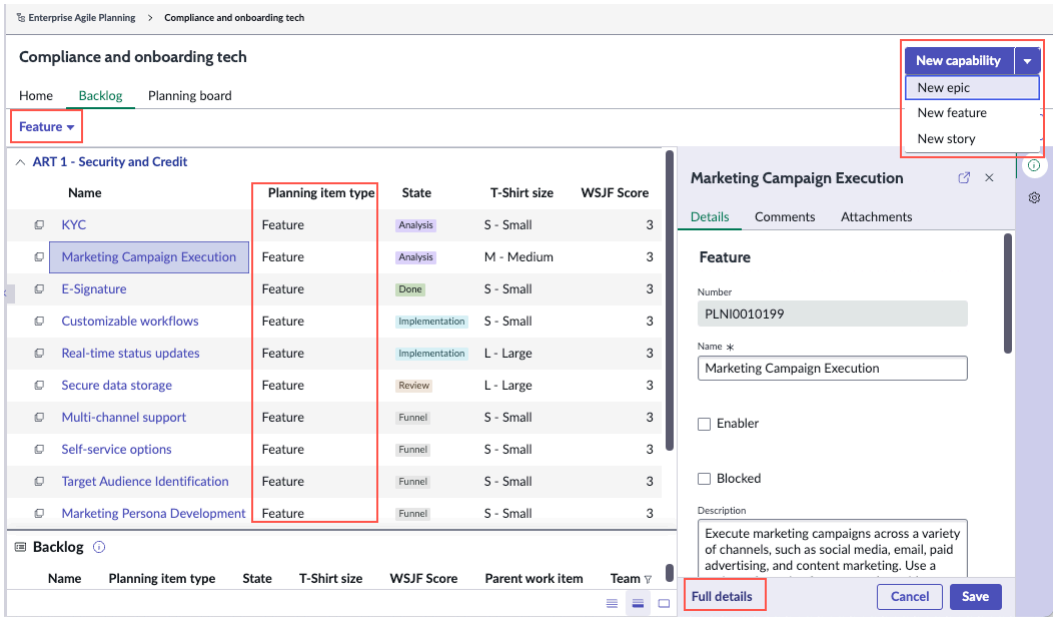


- Team: Assigned work is displayed in a list.

Default work items

The work items shown in Backlog are of the Type that is mapped for this team in the configuration. As you move up in your Agile structure, the level of the work assigned also increases. At an Agile Team level, you see information of stories. As you move up through ARTs and Portfolios, you see information of Features, Capabilities, and Epics. However, at any level, you can change the type of the work items displayed.

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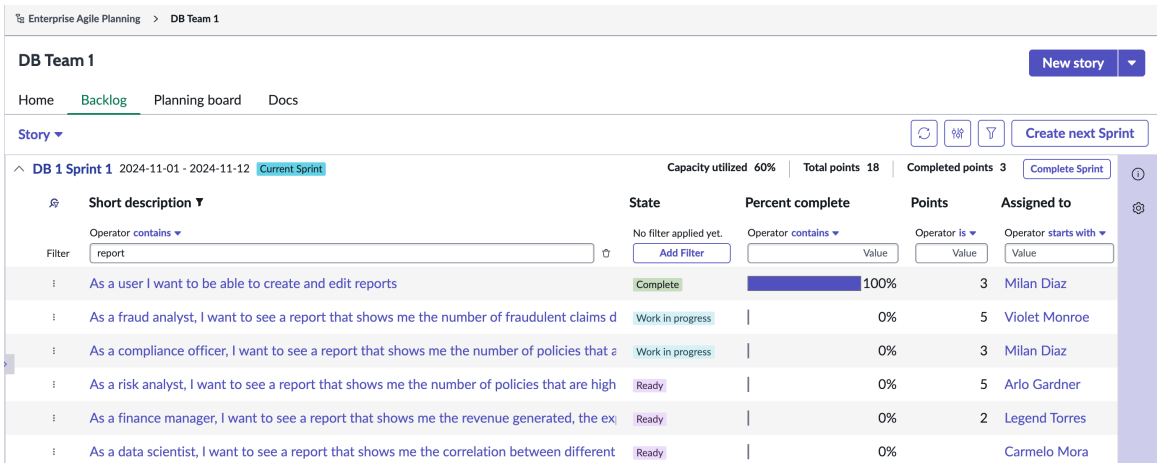
For example, in the screenshot, **Capability** is the default item type mapped to **Compliance and onboarding tech** Solution Train based on its configuration. You can change this selection to see work of other types assigned to this team. When this selection is changed to **Feature**, you can see all the features assigned to this ART. Similarly, you can choose to create and assign a different type of work item for this Solution Train, even though its default item type is **Capability**.

View the details of any work item in the side panel by selecting its primary column. To access all the fields and related lists of the work item, select **Full details** from the side panel.

Note:
The Backlog page for an EAP team shows only those work items that are enabled in its default configuration. For example, for an ART with Full Configuration, the Backlog might show only Features by default. If you want to view other work item types such as Capabilities, Epics, or Stories, work with your admin to update the required EAP configuration details. For more information, see Configure display of other work item types in EAP Backlog and Planning board.

Column-level filtering of data

Quickly find the work items that you need by using column-level filters for the data on your EAP Backlog. Using the Column filtering option (), you can filter data on any column displayed on the **Backlog** tab, which is of the type choice, string, or reference.



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Actions within the Backlog

Within the Backlog, you can perform the following actions:

- Create iterations such as PIs or Sprints for your teams.
- Add work to the team's Backlog.
- Schedule work from Backlog into different iterations.
- Make in-line edits to update information of work such as Status, Assigned to, or Story points.
- Reorder planning items (in a group) to prioritize them.
- Start and complete those iterations.
- Move incomplete work to the Backlog.
- Filter the data that's displayed.
- Choose the columns to be displayed.

Use the following tasks to start creating and scheduling work for teams in EAP.

Create next PI and Sprint from EAP Backlog

Create iterations of Planning Intervals (PI) and Sprints so that teams can start prioritizing and scheduling their work from the Backlog in Enterprise Agile Planning (EAP).

Before you begin

Role required: sn_apw_advanced.eap_user

About this task

From the Backlog, create the next iteration for Agile Release Trains (ARTs) and Teams. Based on your EAP configuration of teams and planning calendars, you can create PIs, Sprints, or the iteration of any other calendar that you created.

This task is explained using the default Full Configuration as an example, where ARTs are mapped to Planning Intervals and Agile Teams are mapped to Sprints.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Enterprise Agile Planning**.
2. From the Agile structure section of the left navigation panel, choose your ART.
3. Create Planning Intervals for ART.
   a. From the Backlog tab of a selected ART, select **Create next Planning Interval**.
   b. In the confirmation dialog box, select **Create**.

   A PI is created for the selected ART. The start and end dates are based on the next available business calendar span that was created by your system admin.

   The default name for the PI is **<calendar name> <n+1>** where:

   - **calendar name** is the name of the business calendar entries that your system admin has created.
   - **n** is the number of the last created PI.

     For example, if the name of your business calendar entry is set as **Greenbacks PI** and Greenbacks PI 1 and Greenbacks PI 2 exist already, then the new PI is named **Greenbacks PI 3**.

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After the PI is created, you can edit this name according to your naming convention. See Update iteration details in EAP.

For more information on how a system admin can define the calendar entries and their dates, see Create calendar entries for iterations in EAP.

Note:
If you have Agile Teams added to this ART, Sprints are automatically created for them too. The number of Sprints created for the teams are based on the child calendar spans that match with the PI dates. If you add Agile Teams to this ART later, Sprints aren't added to them automatically. In that case, proceed to step 4.

4. Create Sprints for Agile Teams.
   a. From the left navigation panel, select an Agile Team.
   b. From the Backlog tab of this team, select **Create next Sprint**.
   c. Confirm by selecting **Create**.

   The default name and dates for this Sprint are according to the business calendar entry defined by the system admin.

   After the Sprint is created, you can edit this name according to your naming convention. See Update iteration details in EAP.

What to do next

- Update iteration details in EAP.
- Schedule work items into iterations in EAP Backlog.

Update iteration details in EAP

Edit details of a PI or a Sprint to update details such as name, team capacity, committed points.

Before you begin

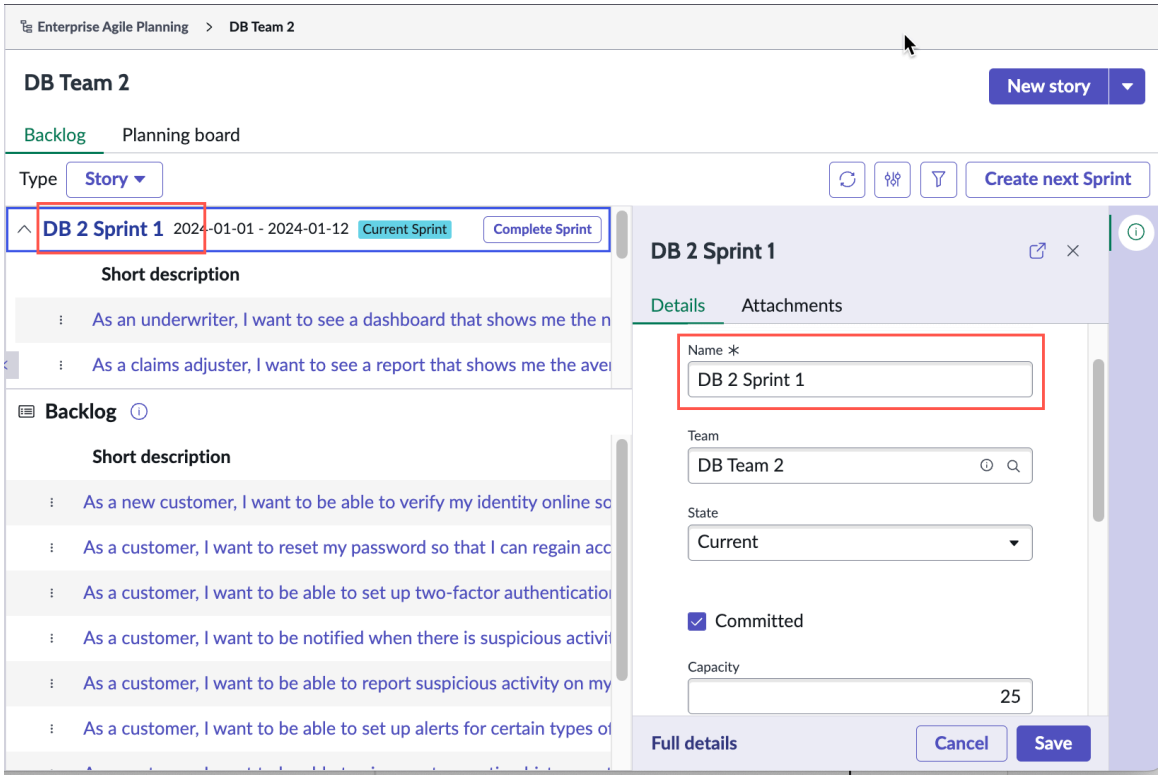
Create next PI and Sprint from EAP Backlog.

Role required: sn_apw_advanced.eap_user

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Enterprise Agile Planning**.
2. From the Agile structure section of the left navigation panel, choose your EAP team.
3. From the Backlog tab of an ART or an Agile Team, select the name of the iteration to open its details in the side panel.
4. From the side panel, edit details such as Name, Capacity, Committed points and others.

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5. Save changes by selecting **Save**.

Related topics

Schedule work items into iterations in EAP Backlog

Create work items for teams in EAP Backlog

Create stories, features, epics, or capabilities for teams to add work to their backlog in Enterprise Agile Planning.

Before you begin

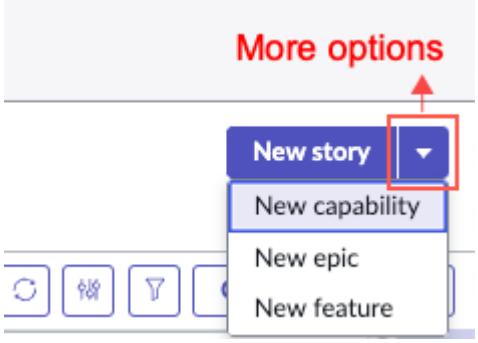
Role required: sn_apw_advanced.eap_user

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Enterprise Agile Planning**.
2. From the Agile structure section of the left navigation panel, choose your EAP team.
3. From the page header, select **New <work item type>**.

   The item type that you see on the screen depends on the configuration for your EAP team. Alternatively, you can choose a different item type from the More options menu.

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4. On the form, fill in the fields.

   The fields that you see on the form vary based on the type of work item that you selected.

5. Select **Submit**.

Result

The new work item is added to one of the sections of the page, based on the values that you fill in on the form.

You can open the work item from the success message to add more information.

What to do next

- Refine the description with Now Assist. See Refine planning items content using write planning item skill.

  This feature requires activating the Write planning item skill of Now Assist for SPM. For more information, see Configure Now Assist for Strategic Portfolio Management (SPM).

- Schedule work items into iterations in EAP Backlog.

Breakdown work from parent work item into child items in EAP

Streamline breaking down work by creating child work items directly from the parent record page in Enterprise Agile Planning workspace.

Before you begin

Role required: sn_apw_advanced.eap_user

About this task

https://player.vimeo.com/video/1079893987?h=7eb7c4b082&badge=0&autopause=0&player_id=0&app_id=58479

From the full details page of a work item, you can create all types of associated child work items. For example, based on the EAP configuration, the full details page of an Epic shows separate tabs for its child work items (Capabilities, Features, or Stories) and the full details page of a Capability shows separate tabs for Features and Stories.

Use the **New** button in each of these related tabs to breakdown work from the parent work item record.

Note:
Views for all default EAP configurations include child item-specific related lists to enable work breakdown. For any new or custom configuration, work with your EAP admin to include these related lists in the EAP views for your configuration.

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This task provides guidance to create child items directly from the parent work item record page, taking the example of creating a Capability record as the child item for an Epic.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Enterprise Agile Planning**.
2. From the Agile structure section of the left navigation panel, choose your EAP team.
3. From the Backlog or Planning board, open the work item that you want to create the child items for and select **Full details**.
4. Select the related tab in which you want to create a child item.
   Any child items that are already associated are shown in the tabs. The Digital Onboarding Epic already has 6 Capabilities, 1 Feature, and 2 Stories associated to it.
5. Select **New** to create a child item.
   For example, to add a new Capability to the Digital Onboarding Epic, select **New** from the Capabilities tab.
   An empty form to fill out the details of the child item opens. The Parent work item field is automatically set to the parent record, which is in this case **Digital Onboarding**.
6. Fill in the details for the child work item and select **Save**.
   The full details page of the newly created child work item is opened.
7. Navigate back to the parent work item record page using the breadcrumb navigation.

What to do next

- Refine the description with Now Assist. See Refine planning items content using write planning item skill.

  This feature requires activating the Write planning item skill of Now Assist for SPM. For more information, see Configure Now Assist for Strategic Portfolio Management (SPM).

- Schedule work items into iterations in EAP Backlog.

Create stories for work items in EAP

Create stories directly from a work item's form. Create them manually or save time by generating them using Now Assist in the Enterprise Agile Planning (EAP) workspace.

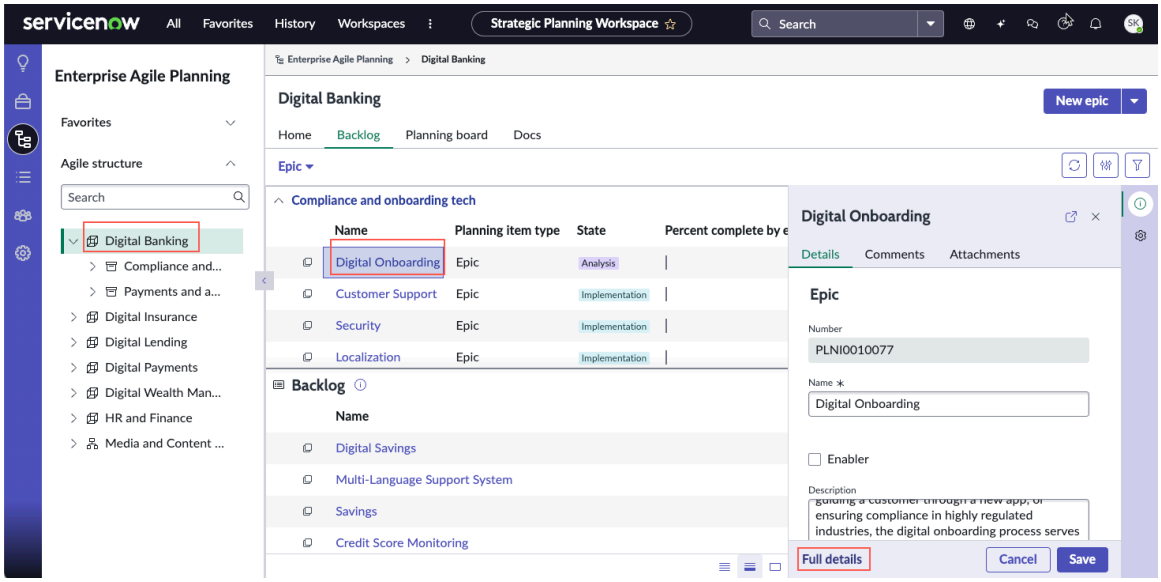
Before you begin
Role required: sn_apw_advanced.eap_user

About this task
This task details the procedure of creating stories for work items such as Epic, Capability, and Feature and uses the example of creating stories for an Epic. To create other child work items, see Breakdown work from parent work item into child items in EAP.

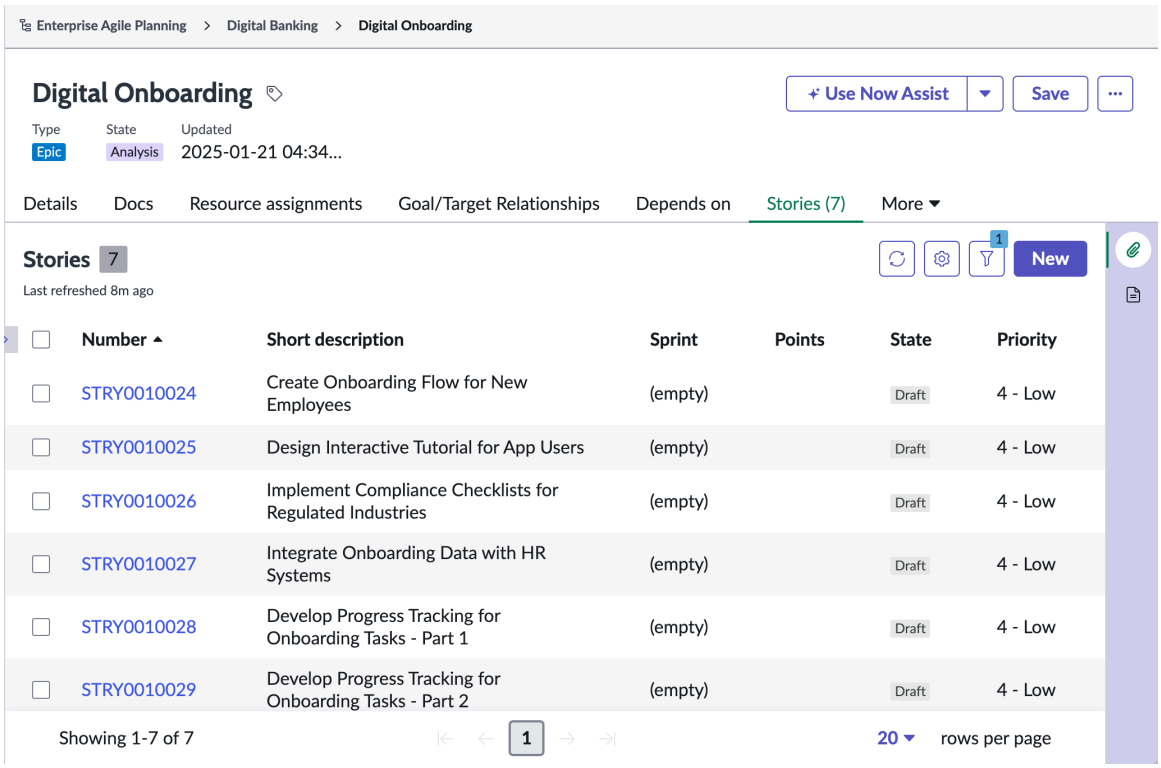
Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Enterprise Agile Planning**.
2. From the Agile structure section of the navigation panel, choose your EAP team.
3. From the Backlog or Planning board pages, select a work item for which you want to create stories.
   In this example, an epic is selected and its details are displayed in the side panel.
4. From the side panel, select **Full details**.

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5. From the work item details page, create stories manually or with Now Assist.
The newly created stories are listed in the Stories tab of the work item details page.

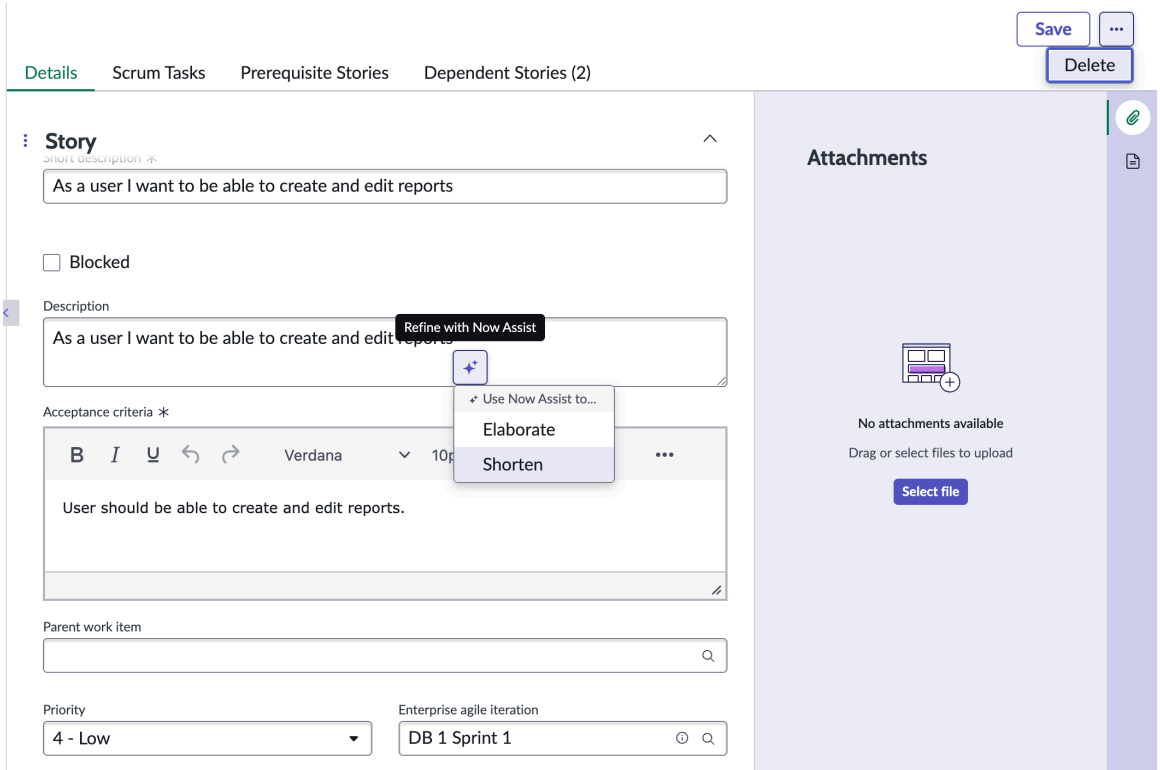


6. You can open a story to update further details or delete them.
From the full details page of a story, you can perform the following actions:
   - Refine the description with Now Assist. See Refine planning items content using write planning item skill.

     This feature requires activating the Write planning item skill of Now Assist for SPM. For more information, see Configure Now Assist for Strategic Portfolio Management (SPM).
   - Update other fields of the story.
   - Add dependencies or scrum tasks to the story.

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- Add any files as attachments to the story.
- Delete the story by selecting **Delete** from the More Actions menu on the header.



Create a copy of work items in EAP Backlog

For creating work items with details similar to an existing item, save time and effort by creating a copy of the existing item.

Before you begin

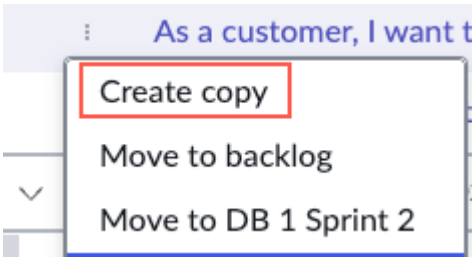
Create work items for teams in EAP Backlog.

Role required: sn_apw_advanced.eap_user

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Enterprise Agile Planning**.
2. From the Agile structure section of the left navigation panel, choose your EAP team.
3. From the Backlog page, locate the item that you want to create a copy of.
4. Select the more icon (⋮) and select **Create copy**.

   Alternatively, you can right-click the work item to view these options.



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Result

A copy of the selected work item is created, with the information in the required fields copied over. This new work item is added to the same section as the original. For example, if you created a copy of a Story from the Backlog section, then the copied story is added to the Backlog section.

What to do next

From the full details page of the work item, you can refine the description with Now Assist. See Refine planning items content using write planning item skill. This feature requires activating the Write planning item skill of Now Assist for SPM. For more information, see Configure Now Assist for Strategic Portfolio Management (SPM).

Related topics

Manage team backlog in EAP

Schedule work items into iterations in EAP Backlog

Schedule work items into iterations in EAP Backlog

Perform backlog grooming and schedule work from the team's backlog for the upcoming iteration Enterprise Agile Planning.

Before you begin

- Create next PI and Sprint from EAP Backlog.
- Create work items for teams in EAP Backlog.

Role required: sn_apw_advanced.eap_user

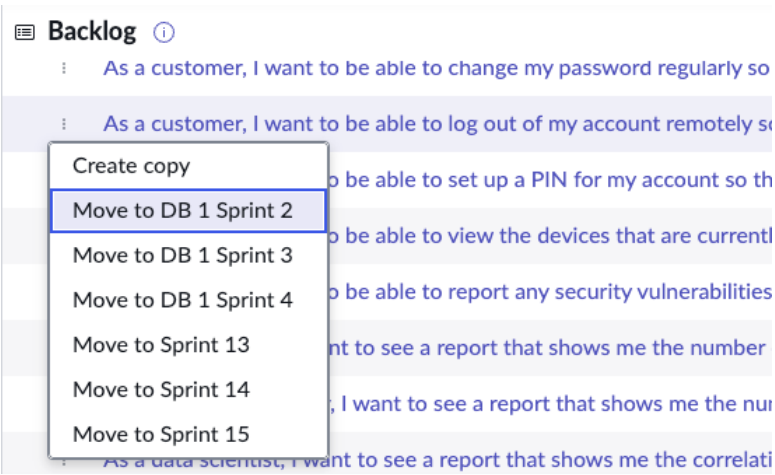
Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Enterprise Agile Planning**.
2. From the Agile structure section of the left navigation panel, choose your EAP team.
3. Move an item from the Backlog section to an iteration.

   a. From the Backlog section, locate the item that you want to schedule into an iteration. During backlog grooming sessions, you can estimate story points and add them in-line to this work item.

   b. Select the more icon (⋮) and choose to move the story to any existing iteration.

   Alternatively, you can right-click the work item to view these options.



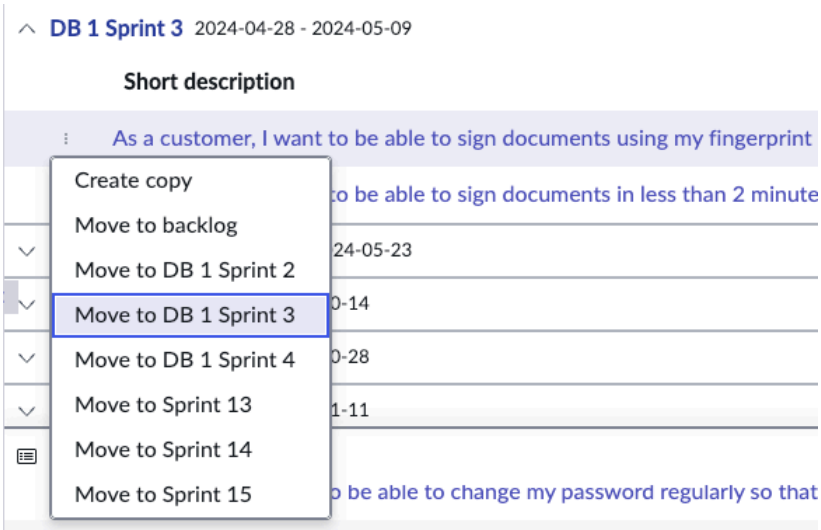
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4. Move an item across iterations.

   a. From the iterations, locate the item that you want to reschedule.

   b. Select the more icon (⋮) and choose the iteration that you want to reschedule into or move the item to the backlog.

      Alternatively, you can right-click the work item to view these options.



5. Repeat the process to complete scheduling work for the next iteration for the team.

What to do next

- Plan work for an ART in EAP.
- Start or complete iterations in EAP.
- Analyze team performance and progress using dashboards.

Start or complete iterations in EAP

Start an iteration of a Sprint or PI so that your team can start working and tracking progress of work, and after your team finishes the assigned work, mark this iteration as complete, directly from the Backlog in Enterprise Agile Planning.

Before you begin

Role required: sn_cwm.cwm_user

Procedure

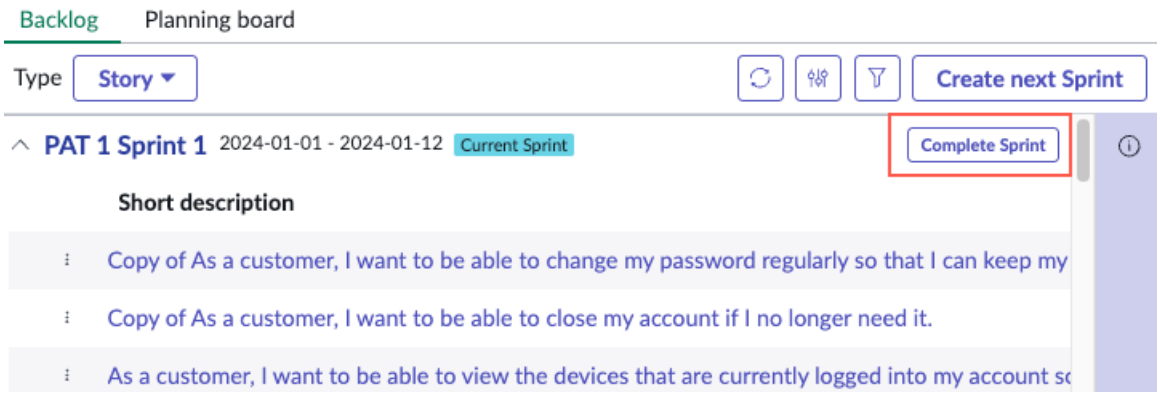
1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Enterprise Agile Planning**.
2. From the Agile structure section of the left navigation panel, choose your EAP team.
3. Complete an iteration.

   a. From the Backlog page, locate the iteration that you want to complete and select **Complete <iteration>**.

      - For a Sprint, the option is displayed as **Complete Sprint**.
      - For a PI, the option is displayed as **Complete Planning Interval**.

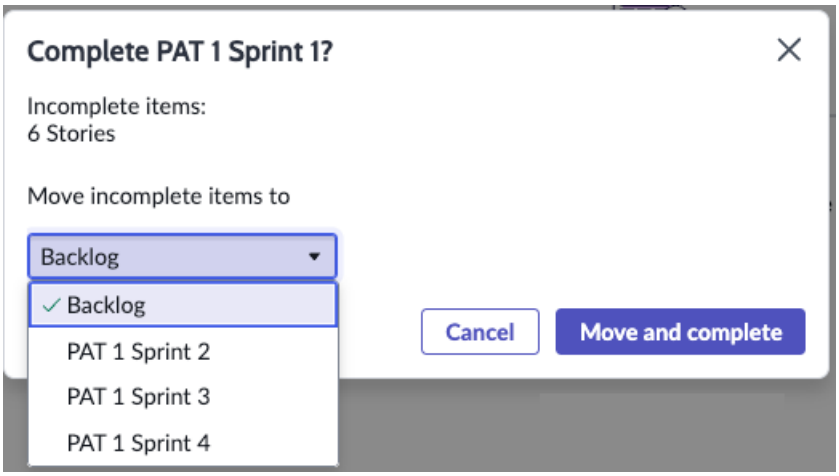
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Note:
Before marking a Planning Interval as Complete, all its associated child Sprints must be complete.



b. Depending on the amount of work that's left incomplete for the current iteration, confirm its completion.

- If there are incomplete work items in the current iteration, you're asked to move the incomplete items to the Backlog or any future iteration.



- If all assigned work is complete, then the iteration is automatically marked complete without any confirmation from you.

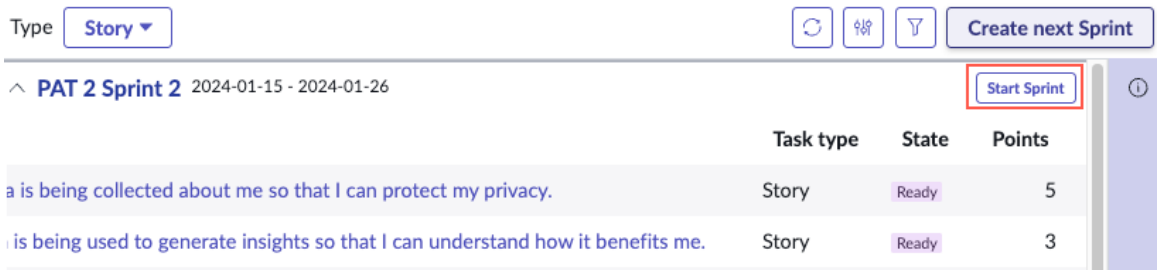
Note:
When you complete any iteration, it is no longer displayed in the Backlog page, and all the work items which are completed in that iteration are no longer available to view from the Backlog page either.

4. Start an iteration.

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a. From the Backlog page, locate the iteration that you want to start and select **Start <iteration>**.

- For a Sprint, the option is displayed as **Start Sprint**.
- For a PI, the option is displayed as **Start Planning Interval**.



Add or remove teams from Favorites in EAP

Add the EAP teams that you frequently work with to Favorites so that you can save time navigating to them in the workspace without searching for them.

Before you begin

Define agile structure in EAP.

Role required: sn_apw_advanced.eap_user

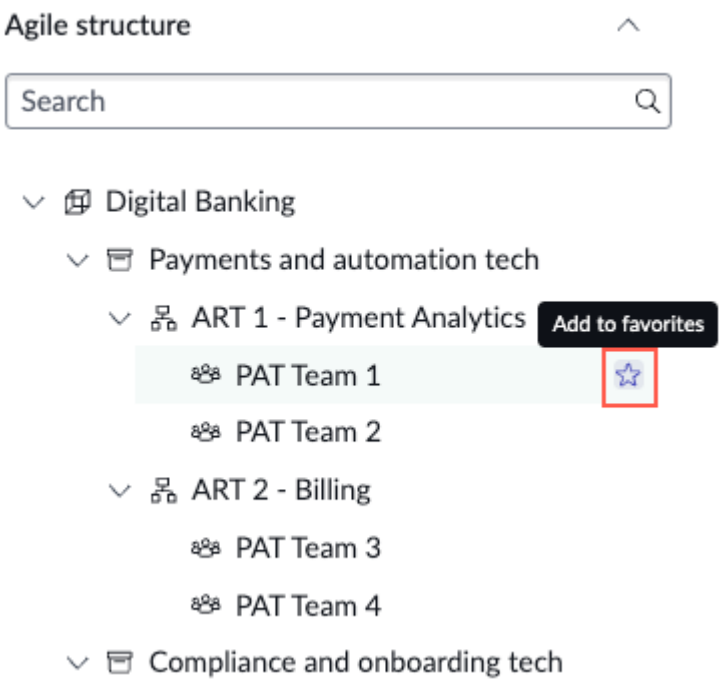
Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Enterprise Agile Planning**.
2. Add a team to Favorites.

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a. From the left navigation panel, locate the team that you want to favorite.

b. Select the Add to favorites icon (☆) next to the team name.

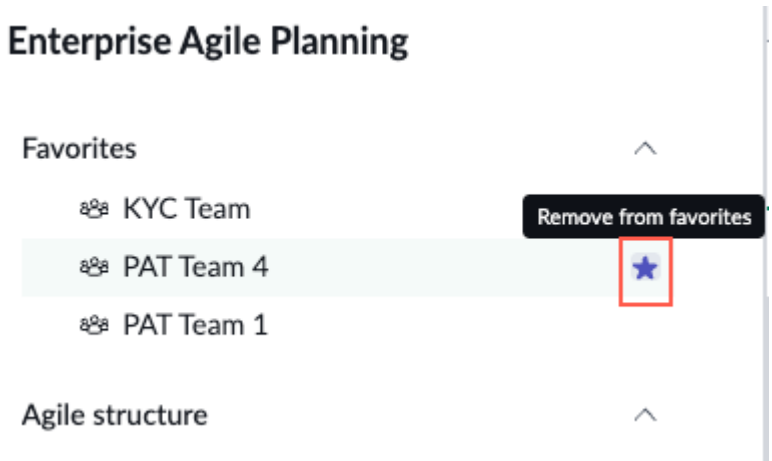


The team is added to the Favorites section of the navigation panel.

3. Remove a team from Favorites.

a. From the Favorites section, locate the team that you want to remove.

b. Select the Remove from favorites icon (★) next to the team name.



The team is removed from the Favorites section.

Personalize and filter data in EAP Backlog

View the information that is most relevant to you and your team on the Backlog tab by choosing the columns to be displayed and applying filters to narrow down the data on the page.

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Before you begin

Role required: sn_apw_advanced.eap_user

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Enterprise Agile Planning**.
2. From the Agile structure section of the left navigation panel, choose your EAP team.
3. Add or remove columns and change their order of display on the Backlog page.

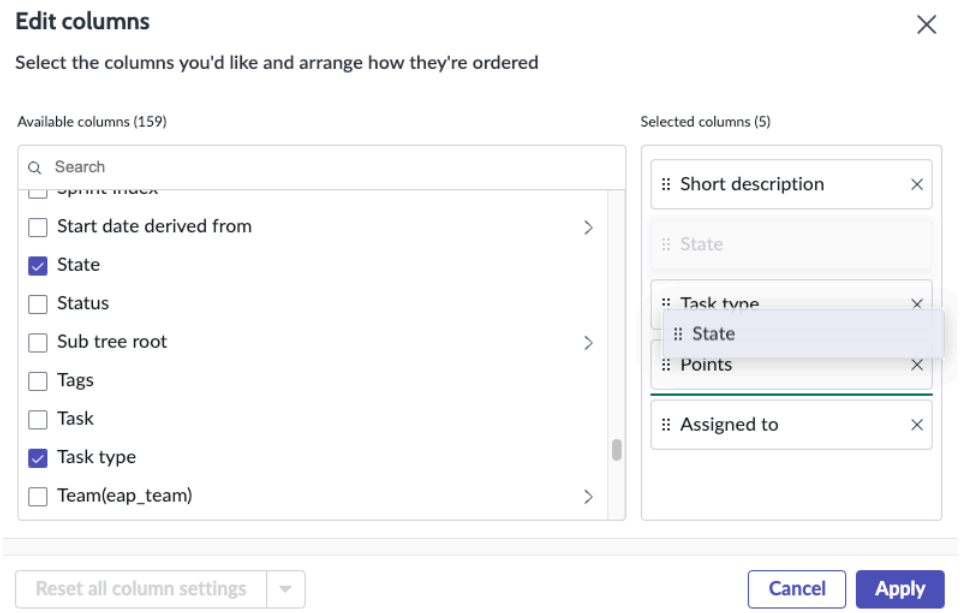
   a. Select **Edit columns** ( ).

   b. From the Available columns section, select the columns that you want to be displayed on the Backlog.

   c. From the Selected columns section, Remove the columns that you don't want on the Backlog.

   d. From the selected columns section, rearrange the columns to change the order of their display on the Backlog.

   e. Select **Apply**.



4. Apply filters to work items to narrow down the data that's displayed on the Backlog.

   a. Select **Filter** ( ).

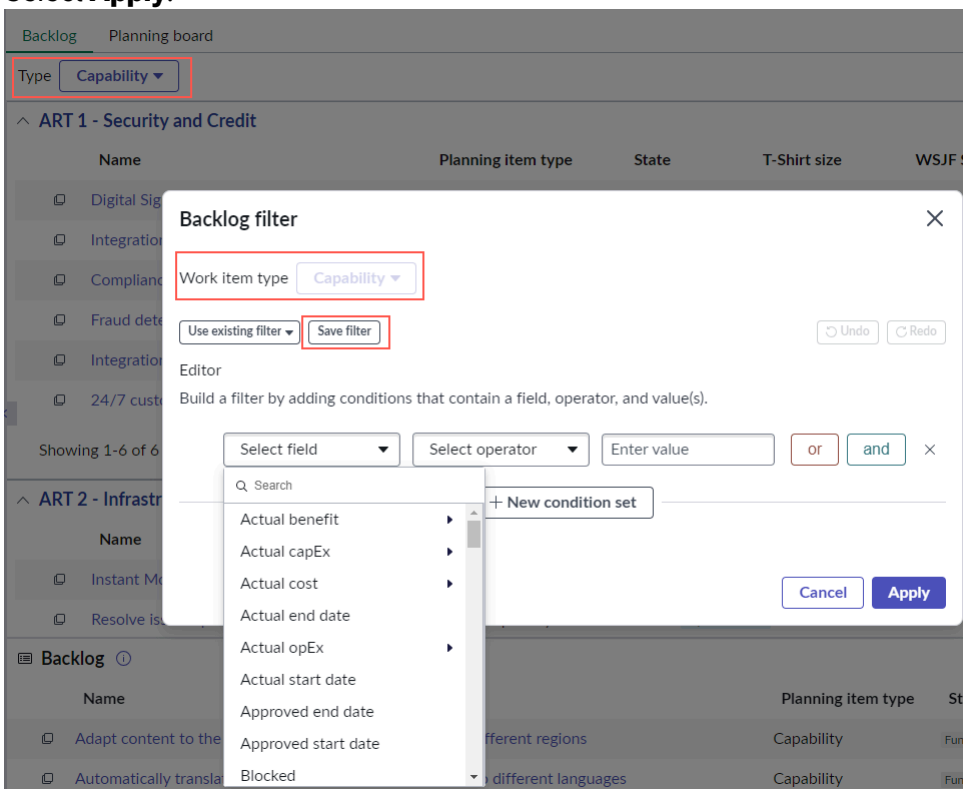
   b. Add conditions to filter the work items.

      You can add multiple conditions. These conditions apply to the **Type** of work item that is displayed in the Backlog page.

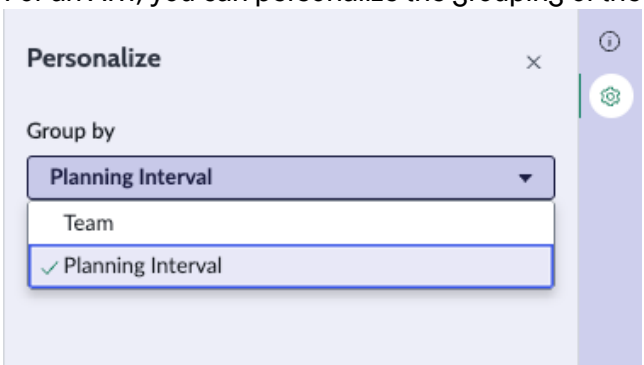
   c. **Optional:** Select **Save filter** so that you need not recreate the same conditions to apply them to a different set of data.

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d. Select **Apply**.



5. For an ART, you can personalize the grouping of the work items by Planning Interval or Team.



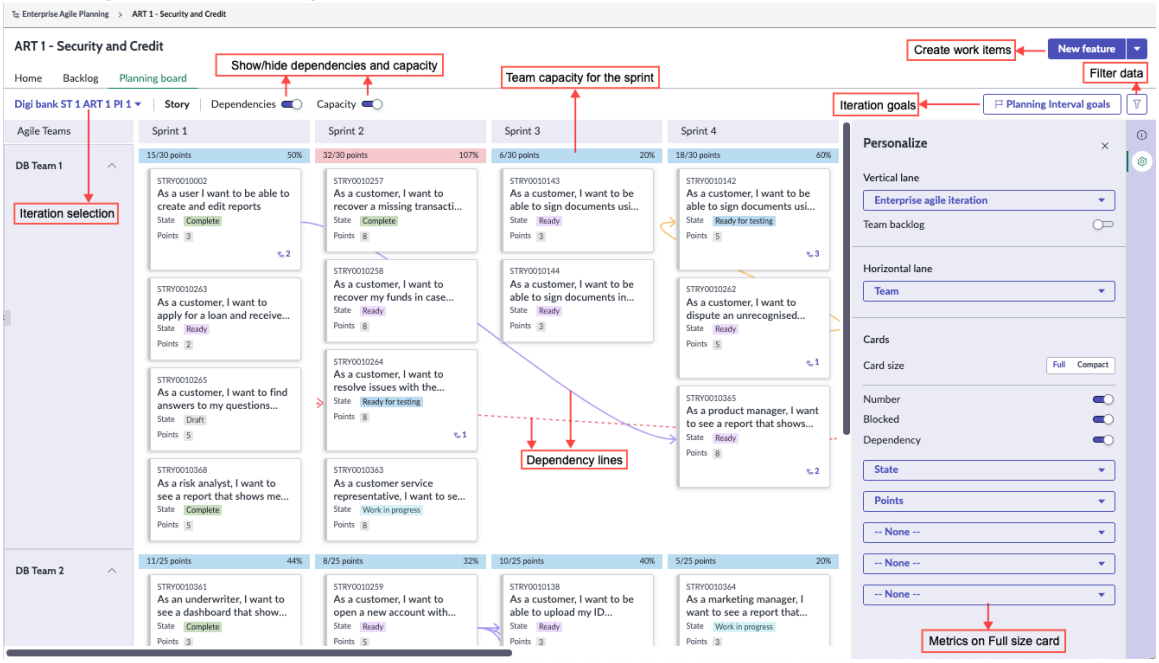
Perform PI planning in EAP

Using the Planning board of Enterprise Agile Planning, plan work for multiple teams across iterations (for example, Big Room Planning). Track the progress of work, create and visualize dependencies between work items, and reschedule work to react quickly to changes while confirming alignment with business priorities.

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Layout of Planning board

Planning Board for an Agile Release Train (ART)



Based on the EAP configuration, the layout of the Planning board across different team levels such as Agile Team, ART, Solution Train, or Portfolio is:

- ART, Solution Train, and Portfolio: Two-dimensional Kanban board layout with differences in the horizontal and vertical lanes.
- Agile Team: Simple Kanban board with work item States as the vertical lanes.

The work items are represented as cards. You can choose to display cards in the compact or full size. Full size cards have data points on them such as item Number, State, and indicators for enabler, dependencies, or blocked whereas compact cards display just the short description.

Default grouping of work items

As you go bottom to top in an Agile structure, the cards are grouped as follows for each team:

Important:
The team hierarchy and the iterations within teams are based on your EAP configuration. The following information applies to the default Full Configuration.

- Agile Team: For an iteration, vertical lanes represent the State of the story.

  For example, if Sprint is the planning calendar configured for an Agile Team, the cards on the Planning Board represent the work assigned for the selected Sprint. For an Agile Team, you can see Stories on the planning board.

- ART: For an iteration, the Story cards are horizontally grouped by child teams and vertical lanes represent the iterations of the child teams.

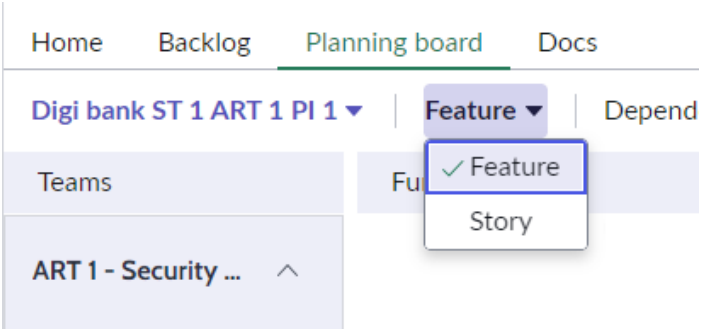
  If Planning Interval (PI) is the planning calendar configured for ART, the vertical lanes represent the Sprints within the selected PI.

- Solution Train: Horizontally grouped by child ARTs and vertical lanes represent the state of the item.

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- Portfolio: Horizontally grouped by child Solution Trains and vertical lanes represent the state of the item.
- If the **Dependency** toggle is enabled, you can visualize the dependencies between work items.
- If the **Capacity** toggle is enabled, you can visualize the work load of the teams.

The Planning board for an EAP team shows only those work items that are enabled in its default configuration. For example, for an ART with Full Configuration, the Planning board shows only Features by default. If your product managers or team members want to switch to viewing other work item types such as Capabilities, Epics, or Stories, work with your admin to update the required EAP configuration details. For more information, see Configure display of other work item types in EAP Backlog and Planning board.



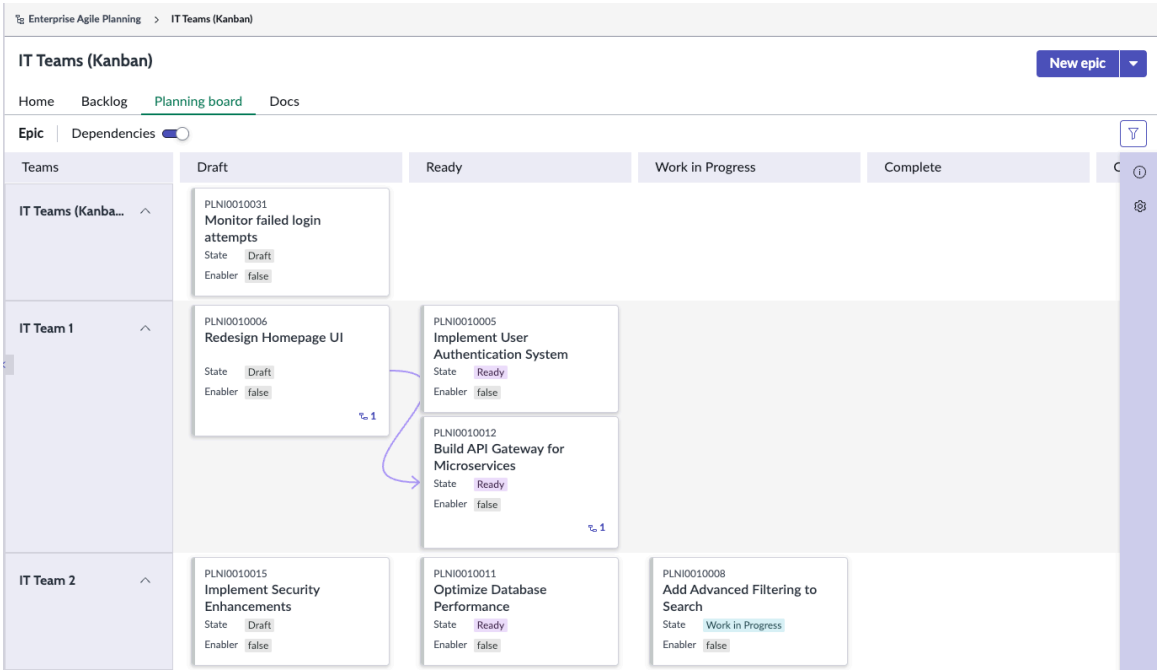
Tip:
For an ART, if you switch from viewing Story to another work item type on the planning board for the first time after updating this configuration, you might not have your work item cards displayed. To resolve this, ensure that the Vertical lane selection in the Planning board personalization is not set to Enterprise agile iteration.

Layout and default grouping for Kanban teams

The Planning board for Kanban teams is grouped as follows:

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- Portfolio: Assigned work items are displayed in a two-dimensional Kanban board, with the teams as the horizontal lanes and state of the assigned work as the vertical lanes. Any work item that is not assigned to the child teams is displayed in the Portfolio section.



- Team: Assigned work is displayed in one-dimensional Kanban board.

As with Backlog, you can change the **Type** of work items displayed and create work items of multiple types from the Planning board.

Use the following tasks to get started with PI Planning within Enterprise Agile Planning.

Plan work for an ART in EAP

Plan work across all teams in an ART for multiple Planning Intervals, coordinate with different teams to manage dependencies and resolve blockers in real-time using the Planning board in Enterprise Agile Planning.

Before you begin

Role required: sn_apw_advanced.eap_user

About this task

This task is explained using an Agile Release Train (ART) that has a Planning Interval (PI) as its calendar. This ART has child teams associated with it, which have Sprints defined for them.

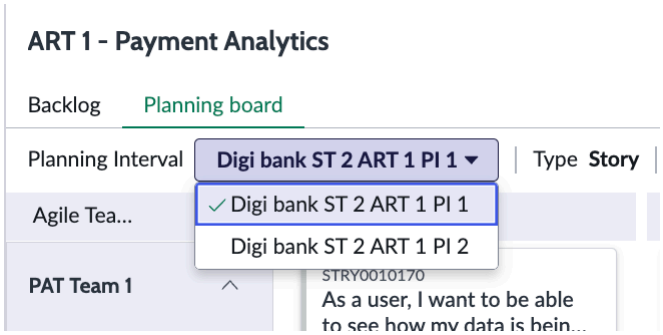
On the board, move the story cards into different lanes or add new stories for the teams during planning meetings. Enable the **Dependencies** toggle to view dependencies and blockers across work for the teams.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Enterprise Agile Planning**.
2. From the Agile structure section of the left navigation panel, choose an ART and select **Planning Board**.

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- The planning board shows the current iteration for the ART by default. You can select a different iteration.

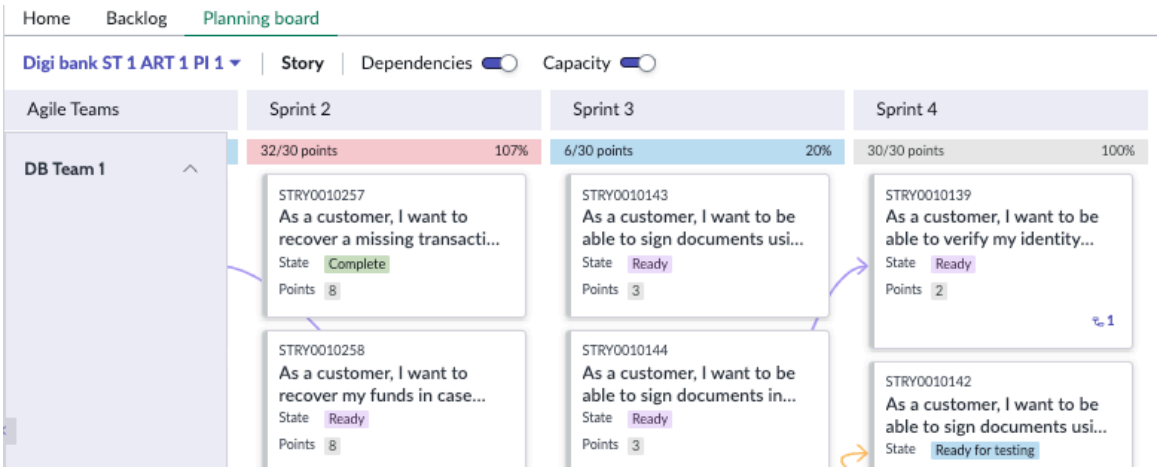


- Based on the scheduling of work done in the Backlog page, story cards are displayed in the Sprint lanes.

3. Enable the **Dependencies** toggle to view dependencies between stories.
   Based on how dependencies are created, the stories sometimes need rescheduling. For more information on story dependencies, see Create and manage dependencies between work items in EAP.
4. Enable the **Capacity** toggle to view the workload of the teams for each Sprint.

   The color of the capacity bar acts as a visual indicator of the workload:

   - Red: Team is overloaded.
   - Grey: Team is at 100% capacity.
   - Blue: Team is at less that 100% capacity.



5. Collaborate with the teams on stories by clicking a card open in the side panel.
   During the planning meetings, collaborate with multiple teams and update story information such as priority, story points, or blocked reason.

   You can also upload files in the Attachments tab and add notes and @-mention team members in the Comments tab of the side panel.

   If you want to access additional information of the story such as scrum tasks, select **Full details** from the side panel.

6. Reschedule a story into a different Sprint or reassign it to a different team by dragging the cards into the respective lanes.

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What to do next

For the work that you assigned and scheduled, track the progress at different levels of your Agile structure using EAP dashboards. See EAP reports and dashboards.

Work item dependencies in EAP

Learn about work item dependencies and how they're shown on the Planning board for a team in Enterprise Agile Planning.

Dependencies overview

While planning, it’s essential to know how your work items are connected with each other. Knowing dependencies between work items enables identification of challenges, coordination for resolution, and an overall improvement in collaboration between teams. Unless you know the dependency for each item, you could be at risk of not scheduling the right work for the right iteration. To get started with dependencies in EAP, see Create and manage dependencies between work items in EAP.

Dependency line colors

On the Planning board in EAP, enable the **Dependencies** toggle to view dependencies lines across teams. The color of the dependency line indicates how the stories are scheduled.

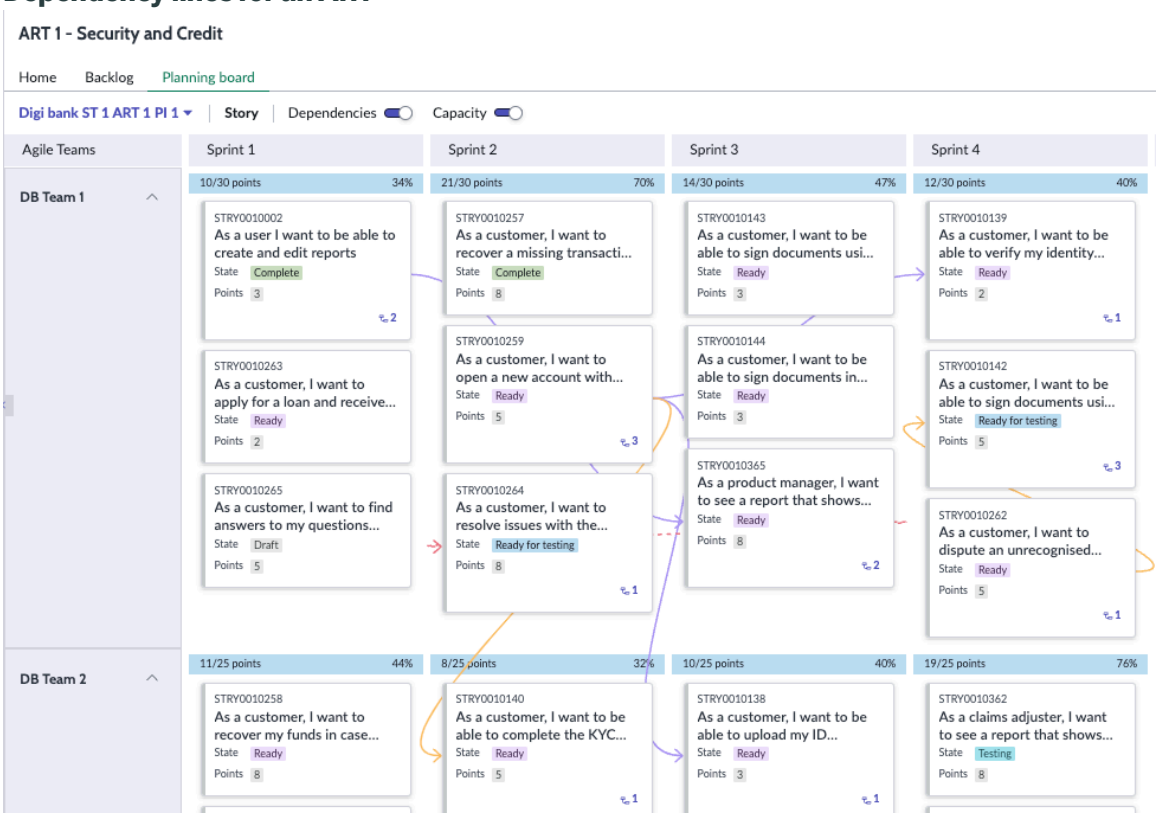
- Purple: The prerequisite story is scheduled in an earlier sprint than the dependent story. This dependency doesn't require any changes.
- Yellow: The prerequisite story is scheduled in the same sprint as the dependent story. In this case, rescheduling the stories might or might not be necessary.
- Red: The prerequisite story is scheduled in a later sprint than the dependent story. In this case, rescheduling stories is necessary.

Note:
These colors are applicable to the Planning board of ARTs and Agile Teams because they typically involve a planning calendar.

- Dependencies on the Planning board of a Solution Train or Portfolio appear in purple and don’t indicate any scheduling conflicts.
- Dependencies on the Planning board of an Agile Team appear in Yellow because they're scheduled for the same Sprint.

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Dependency lines for an ART

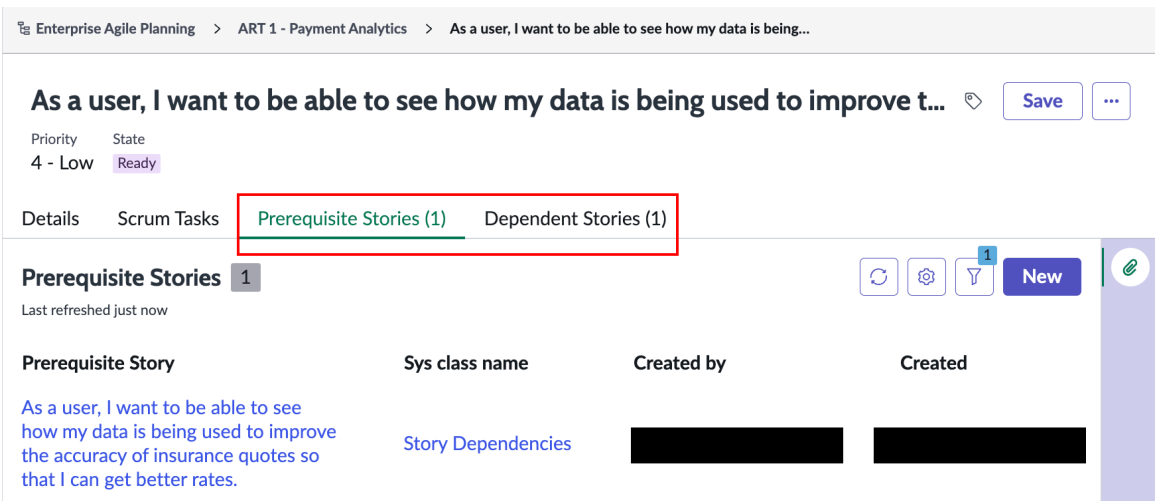


Dependencies related lists for work items

Dependencies added to a work item are displayed in its Full details page. The dependent and prerequisite items are listed in the related lists of this work item. You can also add new dependencies from these related lists.

The name of these related lists varies between Epic, Capability, Feature, and Story. Based on the type of item that you're viewing, the lists could be named as Dependent items, Depends on, Prerequisite stories, and Dependent stories.

The following screenshot shows the dependencies related lists for a Story.



Related topics

Create and manage dependencies between work items in EAP

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Create and manage dependencies between work items in EAP

Draw work item dependencies in real-time across teams and iterations and visually analyze them while you collaborate using the Planning board in Enterprise Agile Planning.

Before you begin

Role required: sn_apw_advanced.eap_user

About this task

This task is explained using stories in an Agile Release Train (ART) as an example, which has Planning Interval (PI) as its calendar. The same guidance applies to creating, updating, and deleting dependencies for work items of an Agile Team, Solution Train, or Portfolio.

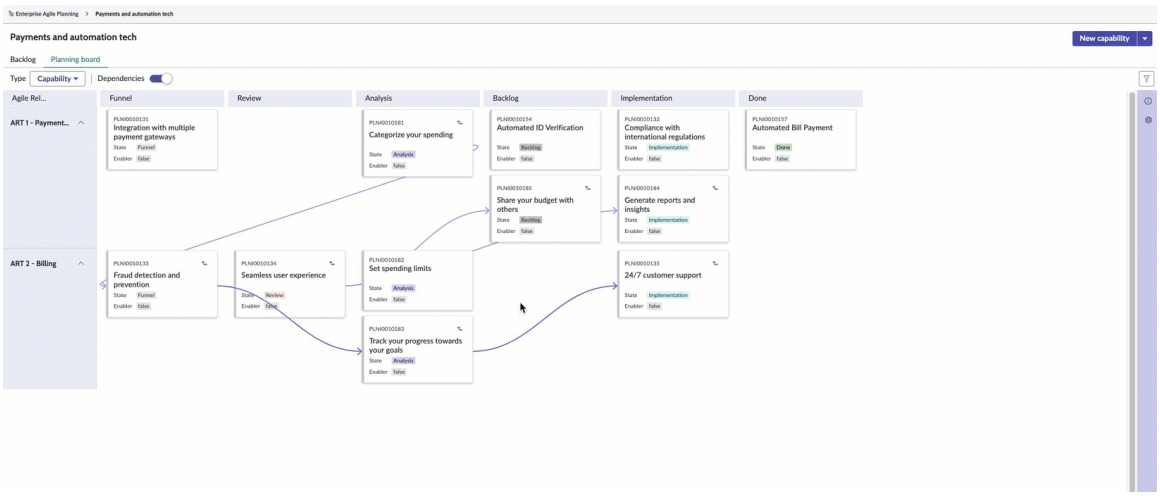
- A story that has a dependency on it by another story is called a prerequisite story.
- A story that is dependent on another story is called the dependent story.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Enterprise Agile Planning**.
2. From the Agile structure section of the left navigation panel, choose your EAP team.
3. Identify stories that have dependencies, and use the interactive functionality of the Planning board to draw dependency lines between them.

   a. On the dependent story card, click the Add dependency line icon ( ).
   A dotted dependency line appears.

   b. Select the prerequisite story card to finish drawing the dependency line.



   The dependencies are added to the work items on the board.

4. If the dependency line color is Yellow or Red, review it and reschedule stories as required.
5. Delete a dependency, to account for any change in the requirements.

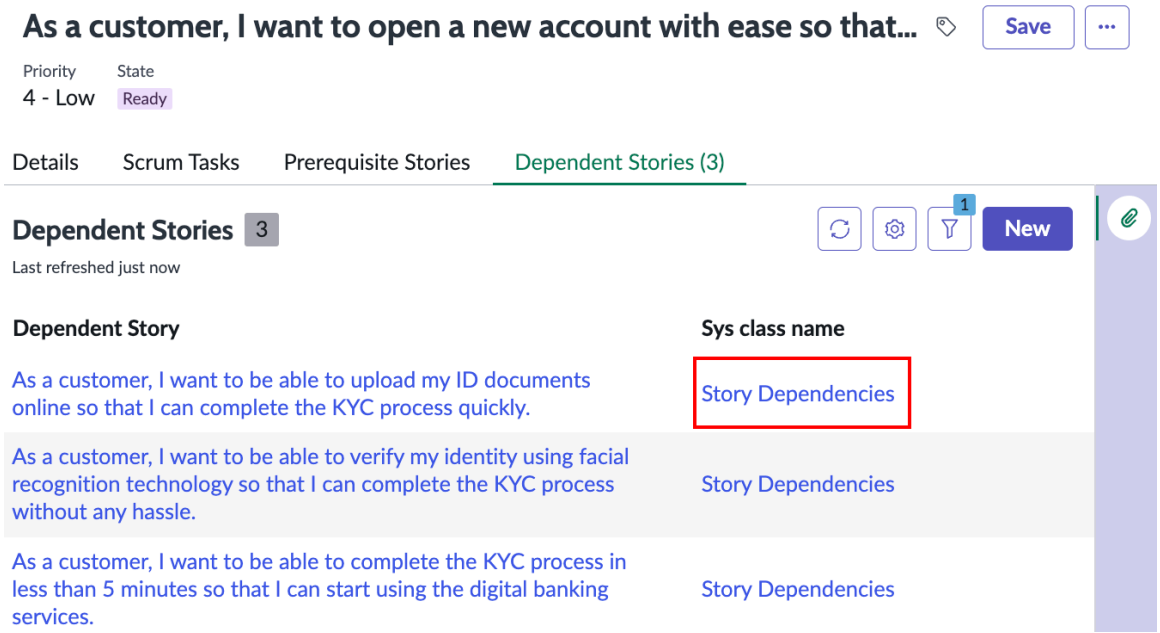
   a. Navigate to the full details page of a work item card that has a dependency to it.

   b. From the Prerequisite Stories or the Dependent Stories related lists, locate the dependency that you want to remove.

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Note:
The names of these related lists are different for Epic and Solution Train.

c. From the Sys class name column, select **Story Dependencies**.



d. From the dependency item header, select the More Actions icon ( ) and select **Delete**.

e. Select **OK** to confirm deleting the dependency.

Personalize the EAP Planning board

Choose metrics and indicators to be shown on cards so that key information is available at a glance on the Planning board in Enterprise Agile Planning workspace.

Before you begin

Role required: sn_apw_advanced.eap_user

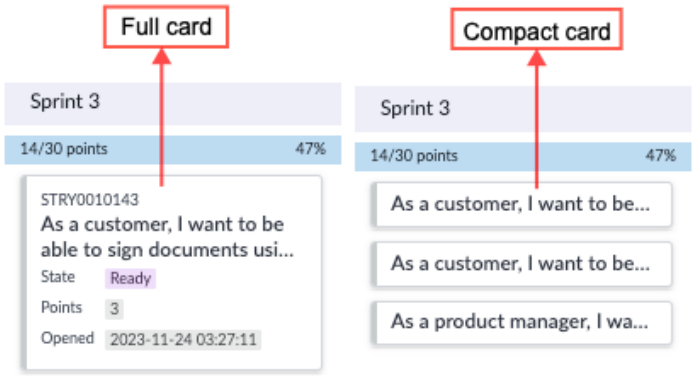
Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Enterprise Agile Planning**.
2. From the Agile structure section of the left navigation panel, select your EAP Team.
3. From the Planning board, select the Planning board personalize panel icon ( ).
4. From the Personalize side panel, update one or more of the following:
   - Selections of vertical lane and horizontal lane grouping.

     Note:
     When **State** is selected as the vertical lane, the columns displayed on the Planning board are based on the Agile methodology (Scrum or SAFe) for the selected EAP team.

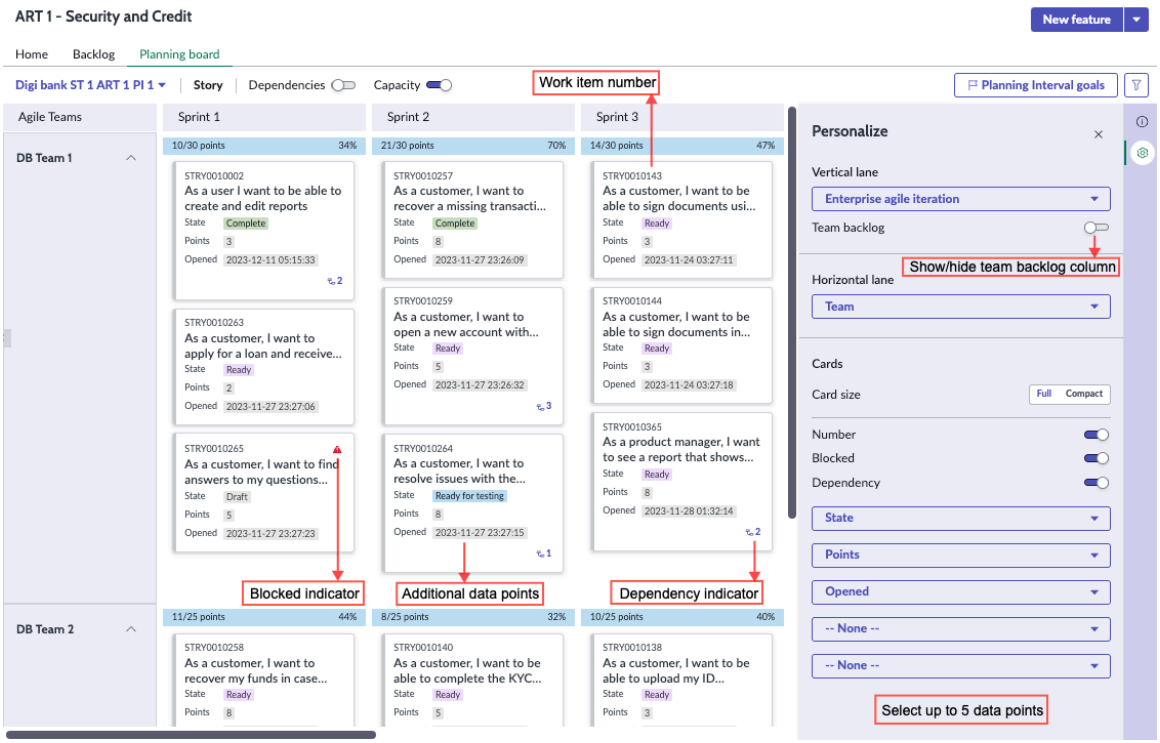
   - Card size: Compact or Full.

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- Indicators and data points that you want displayed on the cards.

The selections are automatically applied to the cards. The following screenshot shows an ART planning board and its personalization options.



5. After making all the required selections, close the side panel.

Collaborate using Docs in EAP

Store and manage all kinds of documentation for Agile teams and their planning items (Epics, Capabilities, and Features) from a centralized location of Enterprise Agile Planning workspace.

https://player.vimeo.com/video/1029774226?h=8e0cab6b63&badge=0&autopause=0&player_id=0&app_id=58479

Docs overview

Product managers, team leads, and team members associated with EAP teams can store and manage information at the Agile Structure level and work level (Epic, Capabilities, and Features).

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- Each planning item or team in EAP can have a separate doc to capture the information related to it.

  For example, for an Epic, you create Docs for high-level business objectives or technical product requirements. Similarly at the team level, you can use Docs to capture the information related to team details, Scrum calls, iteration summaries, and so on.

- Each planning item or Agile Structure level can have multiple Docs associated with it and each Doc can have multiple pages to help you effectively organize key artifacts. Also, the Agile Structure can organize these pages into multiple documents.
- Predefined templates such as Iteration Retrospective, Marketing Plan, Meeting notes are available. Create pages for your Doc using one of these templates or start with an empty page. You can also create or modify the templates according to your requirements.

Features of Docs

The following are the key features of Docs:

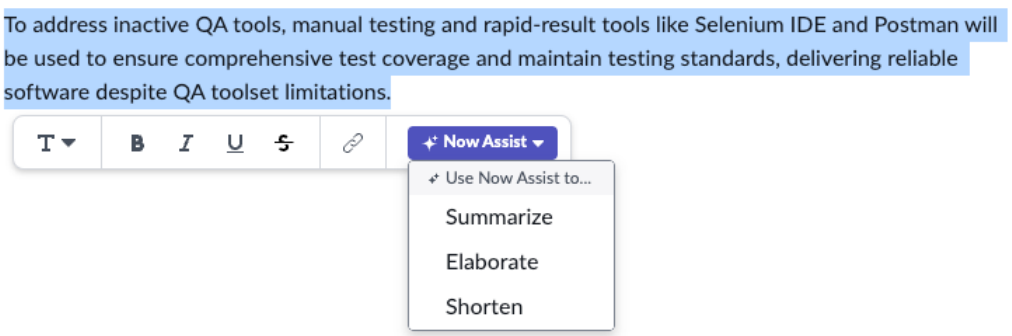
- Auto-save content.
- See who is viewing or working on a Doc using the feature of live user presence.
- Create documents using pre-defined templates. You can edit the templates to suit your team's requirements.
- Use rich text paragraph formatting, which includes headings, lists, alignment, and others.
- Move text blocks to change their placement using block-level editing.
- Tag team members inline or insert tables using the **/** command.
- Add reference to other ServiceNow AI Platform tables to connect work across teams.
- Insert images by uploading files or using web URLs.

> **Note:**
> The experience of inserting Google Images links might not work.

Summarize Docs content using Now Assist for SPM

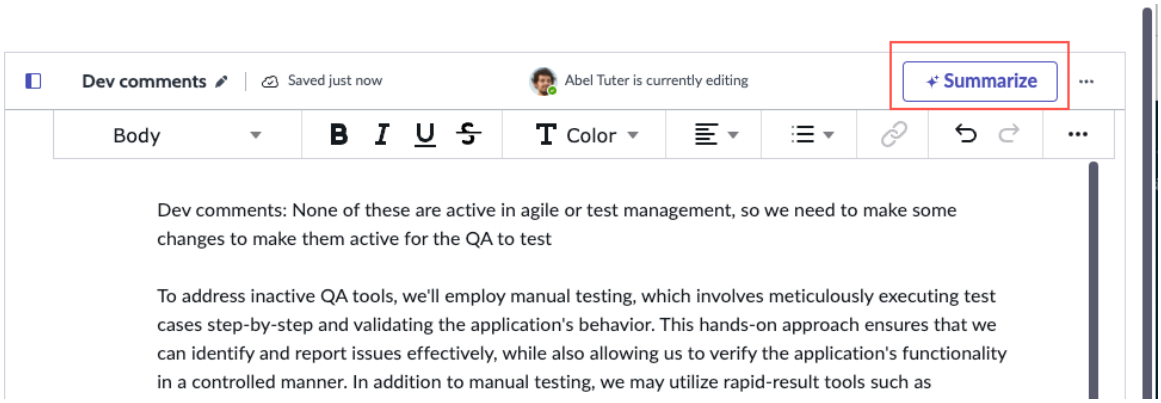
Use Now Assist capabilities to elaborate, shorten, and summarize selected content in Docs, or to get a summary of the whole document.

- Summarize, elaborate, or shorten selected text.



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- Summarize the entire content on the page.

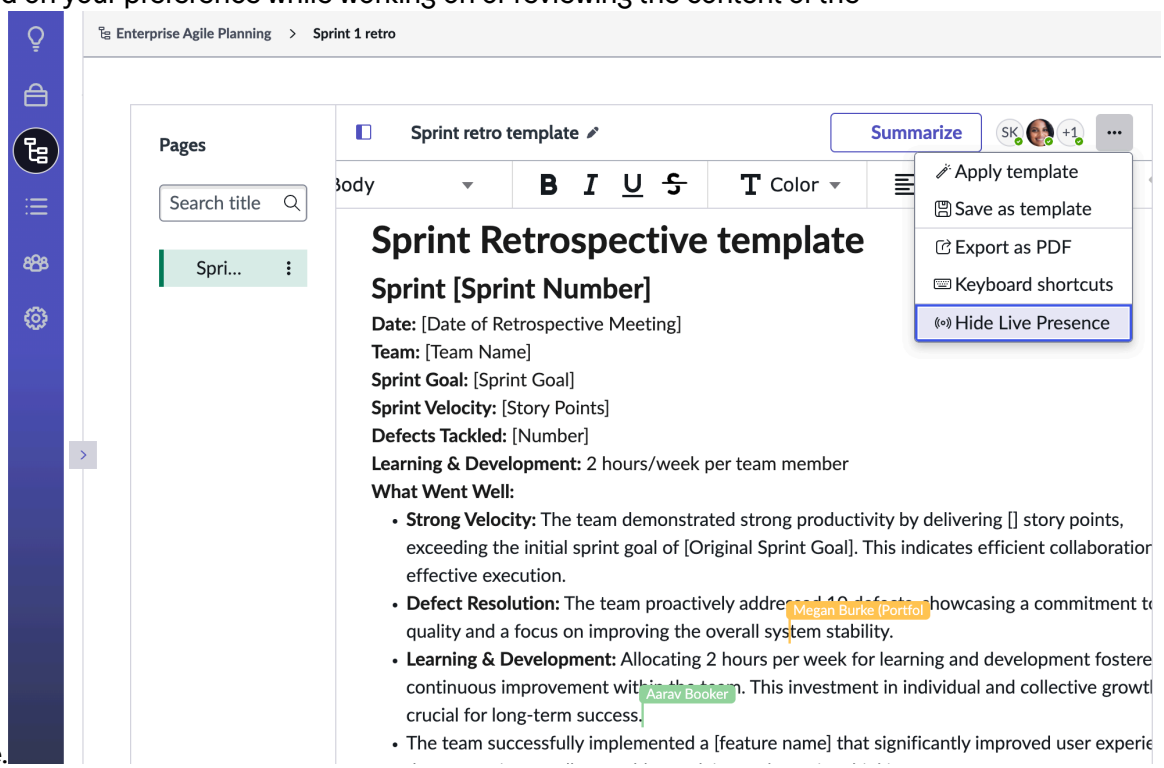


Note:

- Summarizing Docs content in EAP requires activating the EAP doc summarization Now Assist skill. For more information, see Configure Now Assist for Strategic Portfolio Management (SPM).
- If there's more content to summarize, you can remove some content and retry.
- Because the output is AI-generated, review it to ensure accuracy.

Real-time collaboration within EAP Docs

With the feature of real-time collaboration, edit a Doc page concurrently with multiple other editors. Colored cursors denote the current location of each editor on the page. You can choose to show or hide these live presence indicators based on your preference while working on or reviewing the content of the page.



Note:
Application performance may degrade with a large number of concurrent editors.

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Create a Doc in EAP

Store information related to your work, iterations, and teams, and collaborate in real-time using Docs in Enterprise Agile Planning workspace.

Before you begin
Role required: sn_apw_advanced.eap_user

About this task
Create a Doc at the team-level or planning item level.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Enterprise Agile Planning**.
2. Navigate to a team or planning item that you would like to create a Doc for.
3. Select **New** to create a new document for the team or planning item.
4. Provide the title for your document and select **Create**.

   The Doc is created and an untitled blank page is opened for you to start capturing information. You can create multiple pages within the Doc.

What to do next
Manage pages and subpages within a Doc in EAP.

Summarize and refine Docs content in EAP using Now Assist for SPM

Use Now Assist capabilities to elaborate, shorten, and summarize selected content in Docs, or to get a summary of the whole document in Enterprise Agile Planning (EAP).

Before you begin

- Create a Doc in EAP.
- Activate the EAP doc summarization Now Assist skill. See Configure Now Assist for Strategic Portfolio Management (SPM).

Role required: sn_apw_advanced.eap_user

Procedure

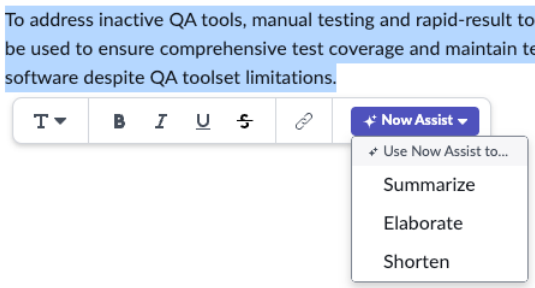
1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Enterprise Agile Planning**.
2. Navigate to your Doc.
3. From your Doc, open the page you want to summarize or refine.
4. Choose to summarize the selected text on the page or the whole page.
   - To refine the selected text:
     a. Select a single block or multiple blocks of content on the page.
     b. Select **Now Assist** and choose an option.

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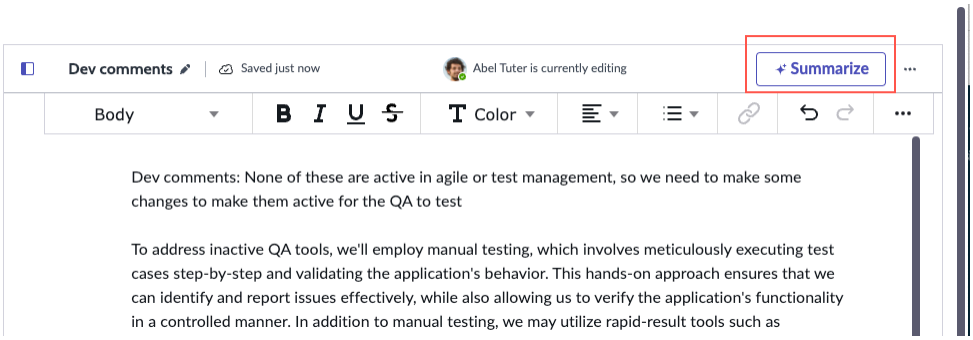
i. **Summarize** to summarize the selected text.

ii. **Elaborate** to lengthen the selected text based on the existing context.

iii. **Shorten** to make the selected text concise.



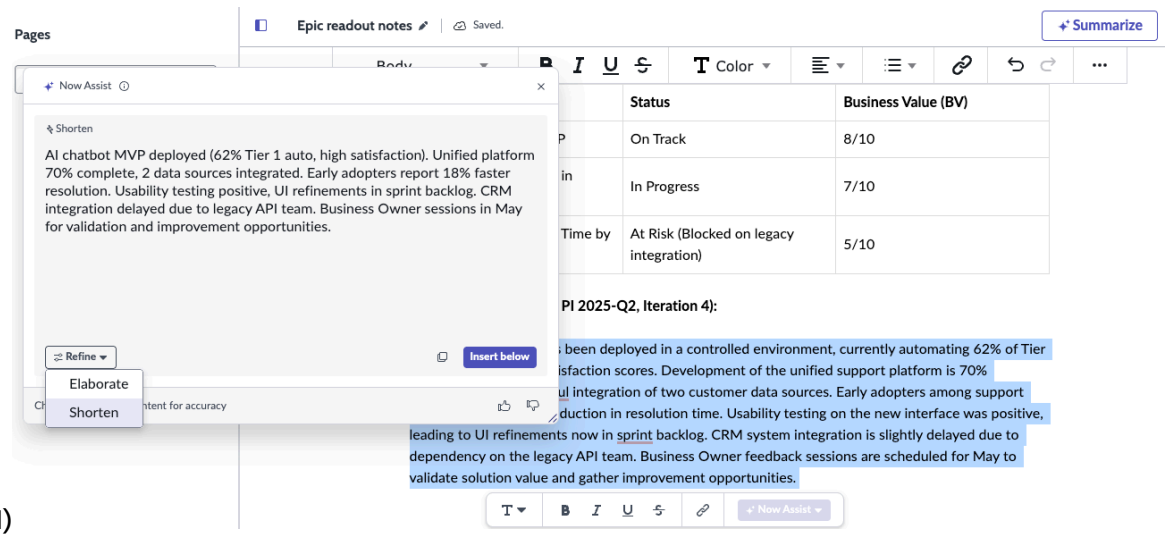
- To summarize the entire content on the page, select **Summarize** from the Doc header.



Tip:
If there's more content to summarize, you can remove some text and retry.

Now Assist analyzes the text and generates an output in a separate pop-up.

5. **Optional:** Based on the output generated, you can further refine the result or insert the generated content into the Doc.



(Optional)

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6. **Optional:** Copy the generated output by selecting the Copy to clipboard icon ( ) to use it for purposes such as sending an email, saving to notes, and others.

> **Important:**
> Because the output is AI-generated, review it to ensure accuracy.

Manage pages and subpages within a Doc in EAP

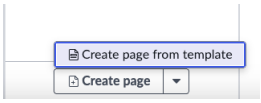
Flexibly organize information for your teams and work items by creating, duplicating, and deleting pages and subpages within a Doc in Enterprise Agile Planning workspace.

Before you begin

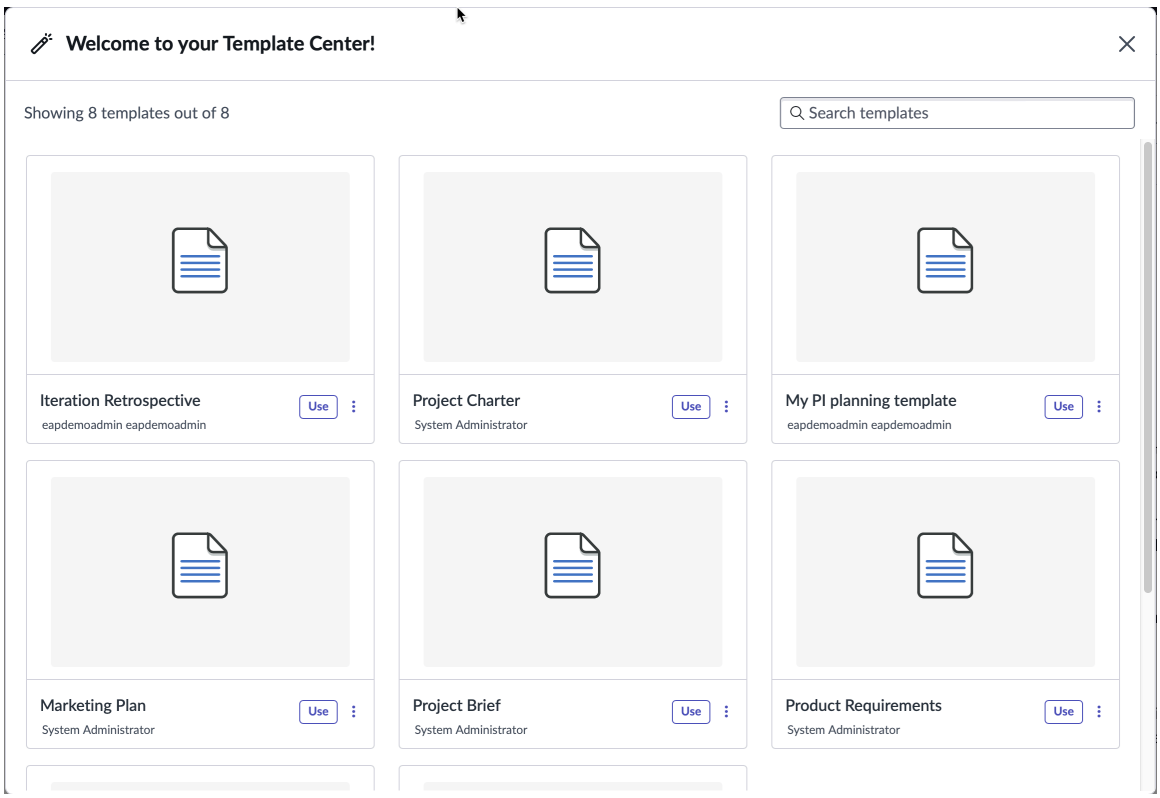
Role required: sn_apw_advanced.eap_user

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Enterprise Agile Planning**.
2. Navigate to your Doc.
3. To create a page, you can create a blank page or start with a predefined template.
   - For a blank page, select **Create page**.
   - To create from templates:
     a. Select **Create Page from template**.



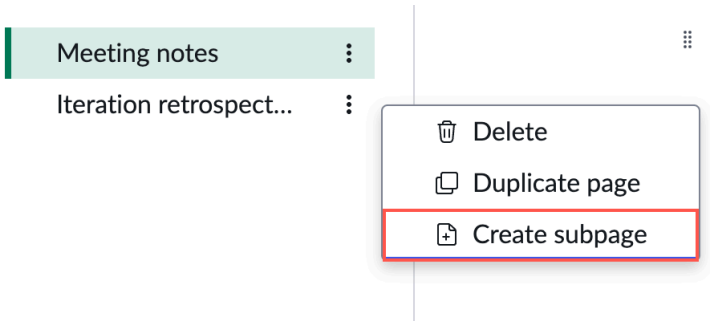
     b. Select a template from the Template Center and select **Create page**.



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The new page is created and added to your Doc with the name **Untitled**, which you can rename.

4. To create a subpage, select the **Page Actions** menu (⋮) and select **Create Subpage**.



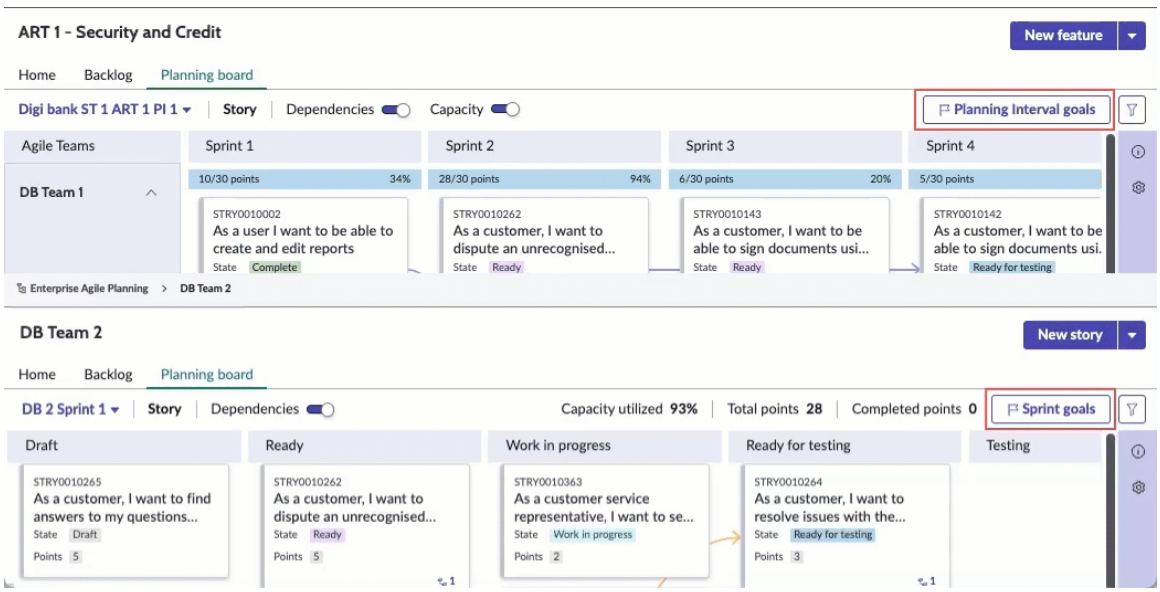
5. To delete a page or a subpage, select the **Page Actions** menu (⋮) and select **Delete**.

Iteration goals and work item goals in EAP

Within Enterprise Agile Planning, define PI-level or sprint level objectives or associate work items with enterprise goals.

Iteration goals

During planning interval (PI) or sprint planning, create functional goals for your team detailing what you plan to accomplish for the current iteration. Depending on your EAP configuration and team structure, you can create goals at the planning interval level or sprint level from the Planning board tab of a team.



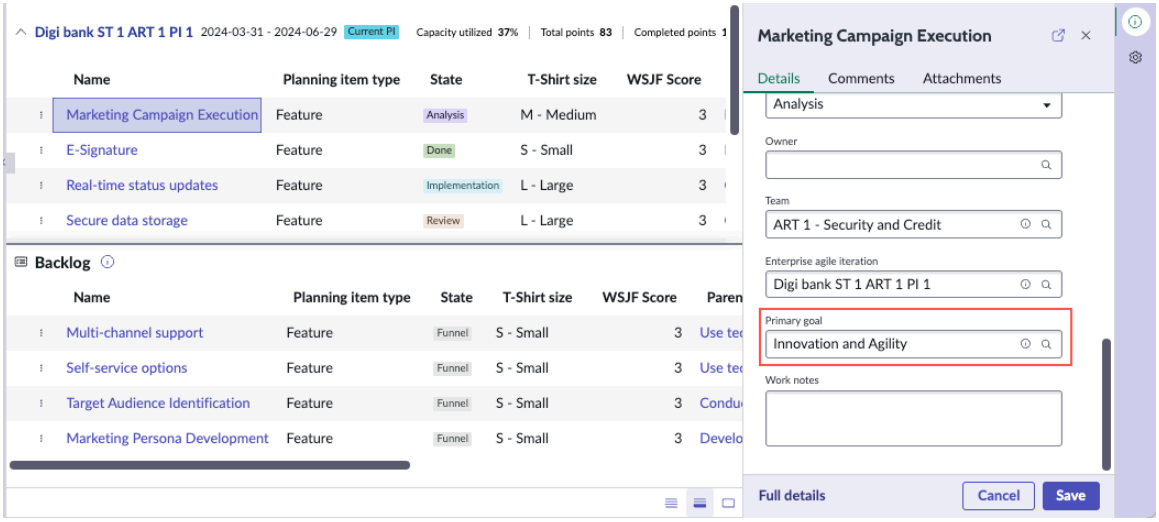
To learn how to create iteration goals in EAP, see Create iteration goals for a PI or sprint in EAP.

Work item goals

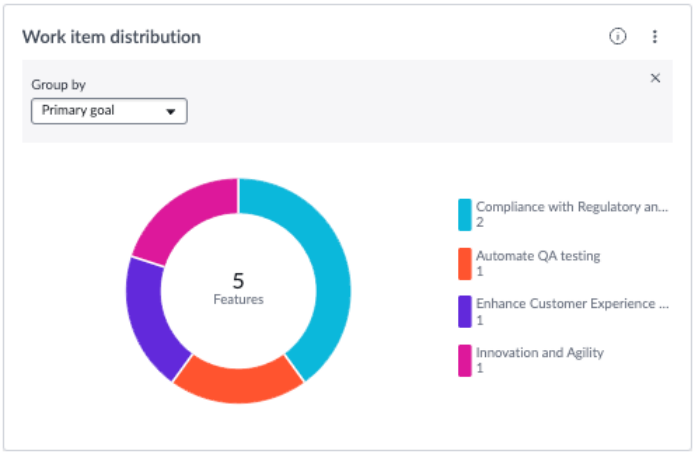
Establish a relationship between work items (Epic, Capability, Feature, or Story) with the portfolio-level or enterprise-level goals and OKRs. When goals are added to work items, the teams working on these items have greater visibility into the value that their work would contribute to.

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Using the **Primary goal** field of the work item details, goals can be added to work items individually.



Product managers, team leads, or team members can also view their work distribution with respect to goals associated in the **Work item distribution** report of the dashboards.



Create iteration goals for a PI or sprint in EAP

Create iteration goals for your Agile teams to highlight the overall objectives to be accomplished for a planning interval or sprint.

Before you begin

Role required: sn_apw_advanced.eap_user

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Enterprise Agile Planning**.
2. From the Agile structure section of the left navigation panel, choose an ART or an Agile team and select **Planning Board**.
   - The Planning board shows the current iteration for the ART by default. You can select a different iteration.
   - The Planning board shows the current sprint for the Agile team by default. You can select a different sprint.
3. Depending on the Agile team level that you are at, select **Planning Interval goals** or **Sprint goals**.

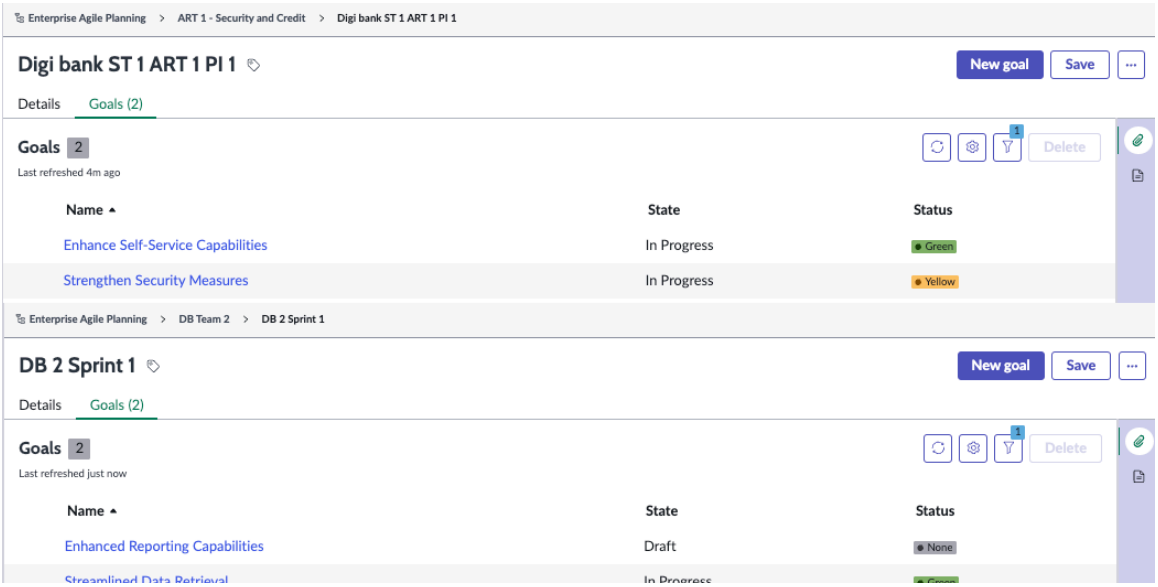
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The **Goals** tab displays existing goals for the PI or sprint.

4. Select **New goal**.
5. In the New iteration goal dialog box, enter the name and a description for the goal.
6. Select **Save**.

Result

The goal is created for the PI or sprint and is displayed in the **Goals** tab.



What to do next

You can add details to your goal or add sub-goals to it by updating its fields. For information on the form fields for a goal, see Goal form.

EAP reports and dashboards

Use the EAP dashboards to visualize metrics, identify blockers, and analyze performance trends for your Agile teams.

As a portfolio manager, product manager, team lead, or a team member, get insights into the team performance using the EAP dashboard. EAP dashboards are available at each level of the Agile structure such as Portfolio, Solution Train, ART, or Team.

You can use a default dashboard or you can configure a custom dashboard and associate it with your Agile configuration. For more information, see Configuring custom dashboards in EAP.

EAP provides the following default Inline and Technical dashboards for different hierarchy levels based on your configuration.

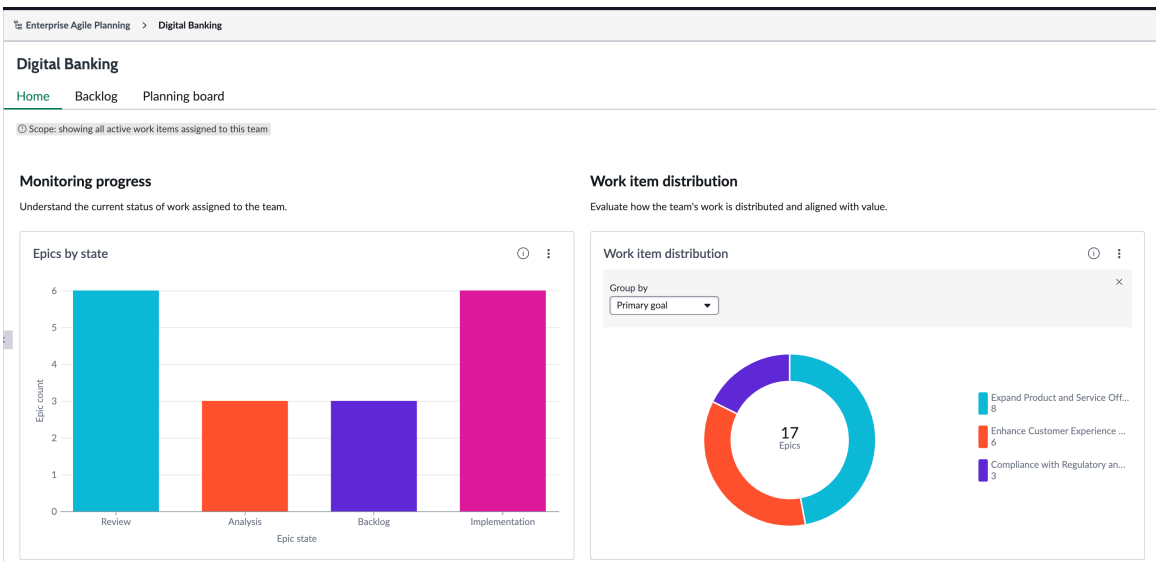
Dashboard	Available with
EAP Portfolio dashboard	• Full Configuration • Portfolio Configuration

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Dashboard	Available with
EAP Solution Train dashboard	• Full Configuration • Large Solution Configuration
EAP ART dashboard	• Full Configuration • Portfolio Configuration • Large Solution Configuration • Essential Configuration
EAP Agile Team dashboard The Agile Team dashboards consist of: • Agile Team Inline Dashboard • Agile Team Technical Dashboard • Agile Team Velocity Inline Dashboard	• Full Configuration • Portfolio Configuration • Large Solution Configuration • Essential Configuration
Kanban Portfolio Dashboard	Kanban configuration
Kanban Team Dashboard	Kanban configuration

EAP Portfolio dashboard

The Portfolio dashboard provides a high-level view of all the active work items in your portfolio.



You can use a default dashboard or you can configure a custom dashboard and associate it with your Agile configuration. For more information, see Configuring custom dashboards in EAP.

Required EAP roles

The EAP read-only (sn_apw_advanced.eap_read_only) role is required to view the dashboard.

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Access the Portfolio dashboard

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Enterprise Agile Planning**.
2. From the Agile structure section of the navigation panel, choose your EAP Portfolio.
3. Select the **Home** tab.

Use cases

User	Dashboard use
• Portfolio manager • Product manager • Team lead • Team member	View the active work items assigned to the teams in your portfolio and distribution of work items.

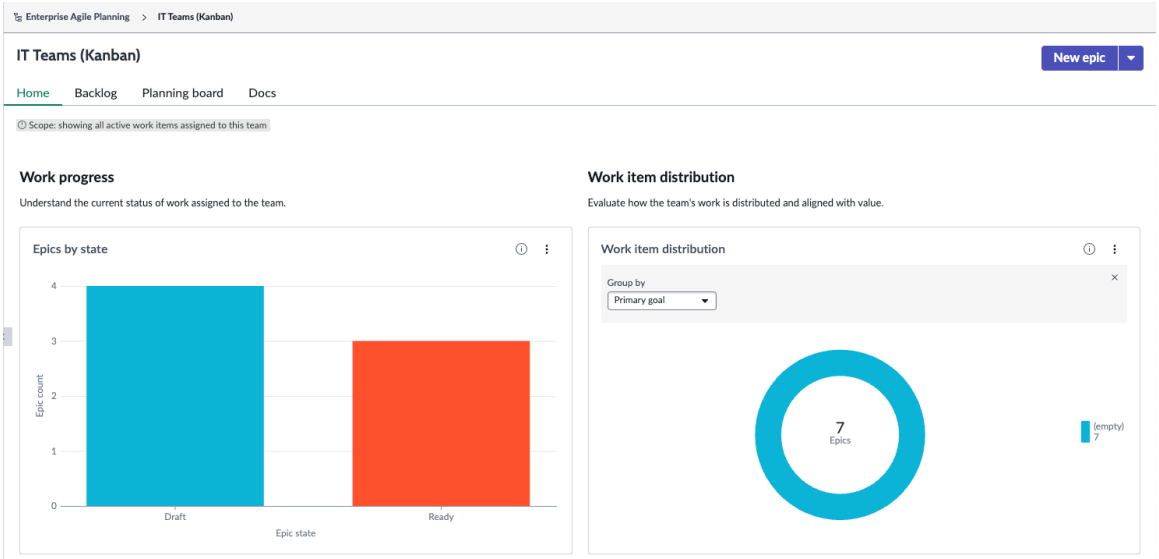
Reports

Title	Type	Source table	Description
Epics by state	Bar graph 	sn_align_core_scrum_epic	Epics assigned to this Portfolio, grouped by their current state.
Work item distribution	Donut 	sn_align_core_scrum_epic	Distribution of work items for the selected attribute. You can group the data using one of the following options: • Primary goal • Primary goal > Category • Strategic program • Owner • Department

Kanban Portfolio dashboard in EAP

The Kanban Portfolio dashboard in Enterprise Agile Planning (EAP) provides progress metrics and work item status for your EAP portfolios of the Kanban configuration.

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Required EAP roles

sn_apw_advanced.eap_read_only or the sn_apw_advanced.eap_user.

Access the Kanban Portfolio dashboard

To open the dashboard:

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Enterprise Agile Planning**.
2. From the Agile structure section of the navigation panel, choose your Kanban EAP Portfolio.
3. Select the **Home** tab.

Use cases

For examples of how different people in your organization would use this dashboard, see these use cases.

User	Dashboard use
• Portfolio manager • Product manager • Team lead • Team member	View the active work items assigned to the teams in your portfolio and the distribution of work items.

Reports

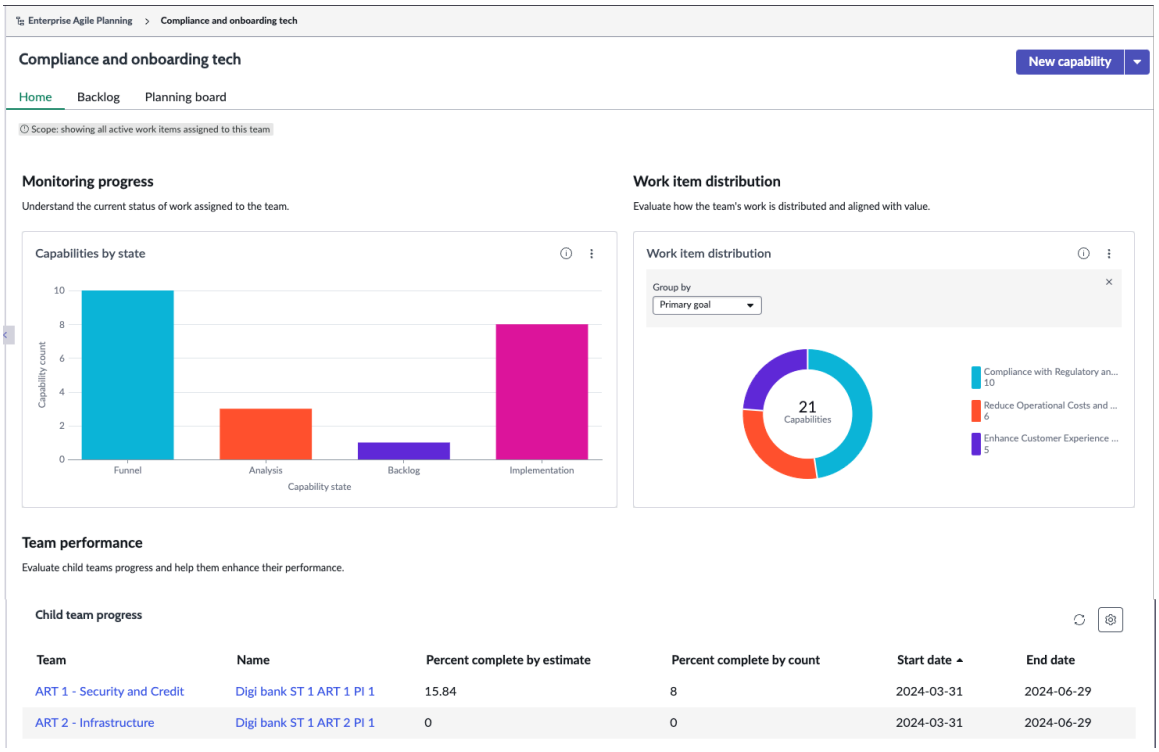
Title	Type	Source table	Description
Epics by state	Bar graph	sn_align_core_scrum_epic	Epics assigned to this Kanban portfolio, grouped by their current state.

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Title	Type	Source table	Description
Work item distribution	Donut 	sn_align_core_scrum_epic	Distribution of work items for the selected attribute. You can group the data using one of the following options: • Primary goal • Primary goal > Category • Strategic program • Owner • Department

EAP Solution Train dashboard

The Solution Train dashboard provides a snapshot of teams' work assignment status such as capabilities, work items, and team performance.



You can use a default dashboard or you can configure a custom dashboard and associate it with your Agile configuration. For more information, see Configuring custom dashboards in EAP.

Required EAP roles

The EAP read-only (sn_apw_advanced.eap_read_only) role is required to view the dashboard.

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Access the Solution Train dashboard

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Enterprise Agile Planning**.
2. From the Agile structure section of the navigation panel, choose your EAP Solution Train.
3. Select the **Home** tab.

Use cases

User	Dashboard use
• Portfolio Manager • Product Manager • Team Lead • Team Member	View the state of capabilities assigned to the teams in your Solution Train, distribution of work items, and team performance.

Reports and data visualizations

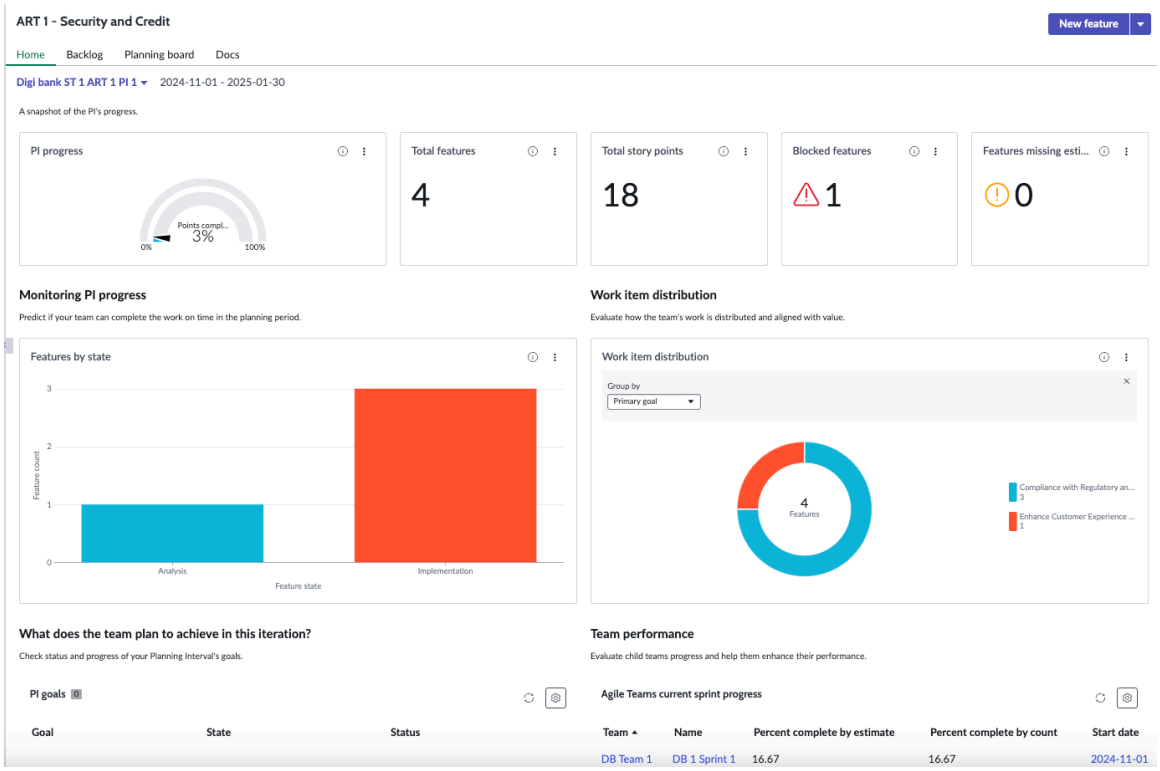
Title	Type	Source table	Description
Capabilities by state	Bar graph 	sn_align_core_capability	Capabilities assigned to this Solution Train, grouped by their current state.
Work item distribution	Donut 	sn_align_core_capability	Distribution of work items for the selected attribute. You can group the data using one of the following options: • Primary goal • Primary goal > Category • Strategic program • Owner • Department
Team performance	List 	sn_apw_advanced_eap_iteration	Evaluate child teams progress and help them enhance their performance. You can choose and rearrange the columns of the report

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Title	Type	Source table	Description
			by selecting the ⚙ icon.

EAP ART dashboard

The ART dashboard provides a snapshot of the overall progress of your Planning Interval (PI).



You can use a default dashboard or you can configure a custom dashboard and associate it with your Agile configuration. For more information, see Configuring custom dashboards in EAP.

Required EAP roles

The EAP read-only (sn_apw_advanced.eap_read_only) role is required to view the dashboard.

Access the ART dashboard

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Enterprise Agile Planning**.
2. From the Agile structure section of the navigation panel, choose your EAP ART.
3. Select the **Home** tab.

Use cases

User	Dashboard use
• Portfolio Manager • Product Manager	View the progress and status of your Planning Interval's goals, features, overall progress, and team performance.

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User	Dashboard use
• Team Lead • Team Member	

Reports and data visualizations

Title	Type	Source table	Description
PI progress	Gauge 	sn_apw_advanced_eap_iteration	Percentage of points completed out of the total scope for this Planning Interval.
Total features	Single Score 	sn_align_core_feature	The total number of features scheduled for this Planning Interval.
Blocked features	Single Score 	sn_align_core_feature	Number of features scheduled for this PI that are blocked.
Total story points	Single Score 	sn_align_core_feature	Total story points for all the features scheduled for this Planning Interval.
Features missing estimates	Single Score 	sn_align_core_feature	Number of features, scheduled for this iteration, that have child stories without estimates.

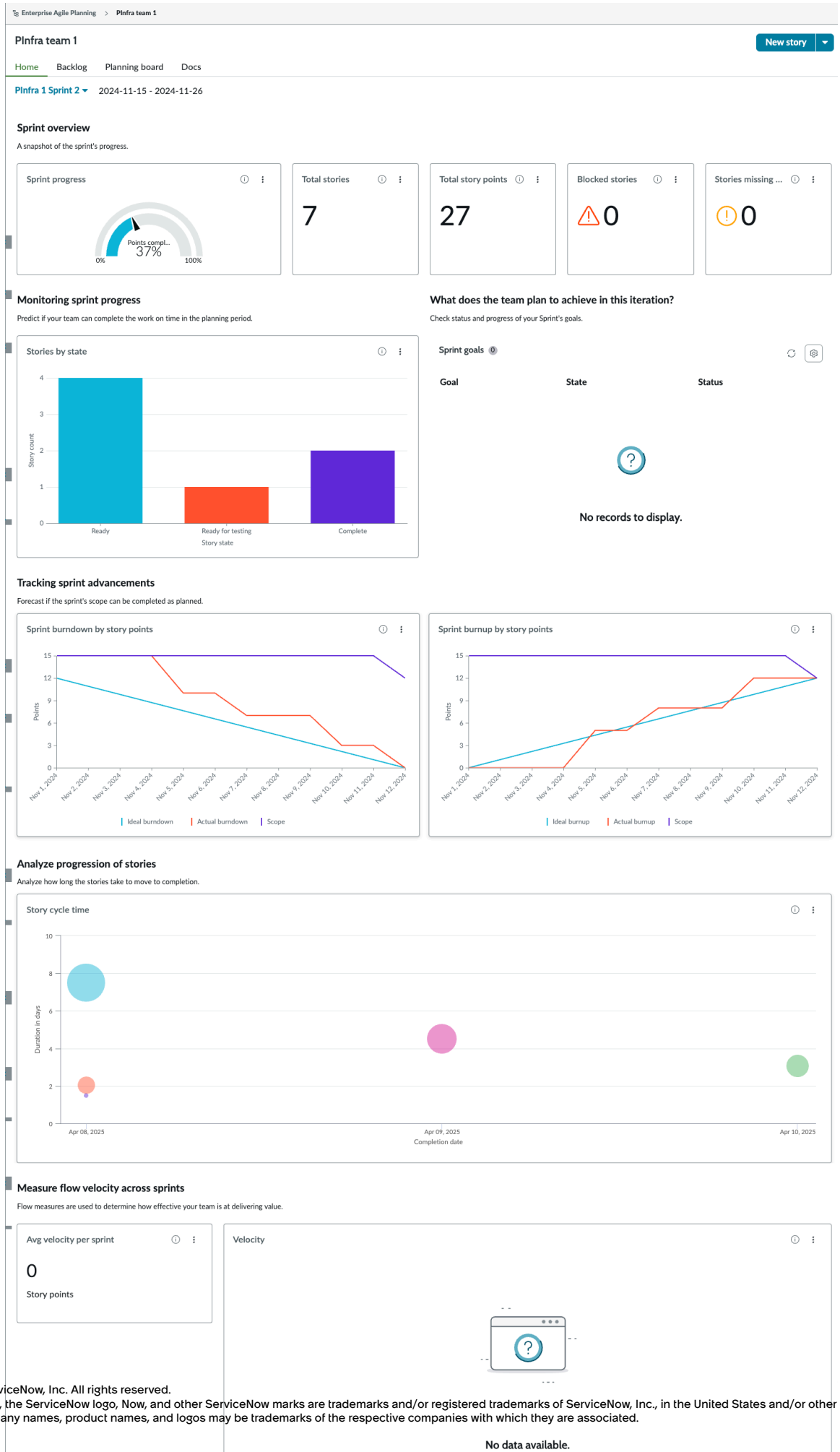
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Title	Type	Source table	Description
Features by state	Bar graph 	sn_align_core_feature	Features scheduled for this PI, grouped by their current state.
Work item distribution	Donut 	sn_align_core_feature	Distribution of work items for the selected attribute. You can group the data using one of the following options: • Primary goal • Primary goal > Category • Strategic program • Owner • Department
What does the team plan to achieve in this iteration?	List 	sn_gf_goal	Status and progress of your Planning Interval's goals.
Team performance	List 	sn_apw_advanced_eap_iteration	Evaluate child teams progress and help them enhance their performance. You can choose and rearrange the columns of the report by selecting the  icon.

EAP Agile Team dashboard

The Agile Team dashboard provides you with sprint progress and team performance details for an Agile team in the Enterprise Agile Planning (EAP) workspace.

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You can use a default dashboard or you can configure a custom dashboard and associate it with your Agile configuration. For more information, see Configuring custom dashboards in EAP.

Required EAP roles

The EAP read-only (sn_apw_advanced.eap_read_only) role is required to view the dashboard.

Access the Agile Team dashboard

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Enterprise Agile Planning**.
2. From the Agile structure section of the navigation panel, choose your EAP team.
3. Select the **Home** tab.

Use cases

User	Dashboard use
• Portfolio manager • Product manager • Team lead • Team member	View the progress and status of your sprint goals, stories, overall progress, and team performance.

Reports

Title	Type	Source table	Description
Sprint progress	Gauge 	sn_apw_advanced_eap_iteration	Percentage of points completed out of the total scope for this sprint.
Total stories	Single Score 	rm_story	Number of stories that are scheduled for this sprint.
Blocked stories	Single Score	rm_story	Number of stories that are blocked for this sprint.

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Title	Type	Source table	Description
			
Total story points	Single Score 	rm_story	Sum of points of all stories that are scheduled for this sprint.
Stories missing estimates	Single Score 	rm_story	Number of stories that are scheduled for this sprint that don't have story points.
Stories by state	Bar graph 	rm_story	Stories that are scheduled for this sprint, grouped by their current state.
What does the team plan to achieve in this iteration?	List 	sn_gf_goal	Status and progress of your sprint's goals. You can rearrange the columns of the report by selecting the Settings icon (⚙).
Sprint burndown by story points	Trend 	This trend uses the following indicators: • EAP: Sum of story points of all stories in the current iteration. • EAP: Sum of story points of active stories in the current iteration.	Burndown trend comparing the sprint's ideal pace with the current pace. This report can help you analyze if the scope can be completed before the end of the sprint.
Sprint burnup by story points	Trend	This trend uses the following indicators:	Burnup trend comparing the sprint's ideal pace with the

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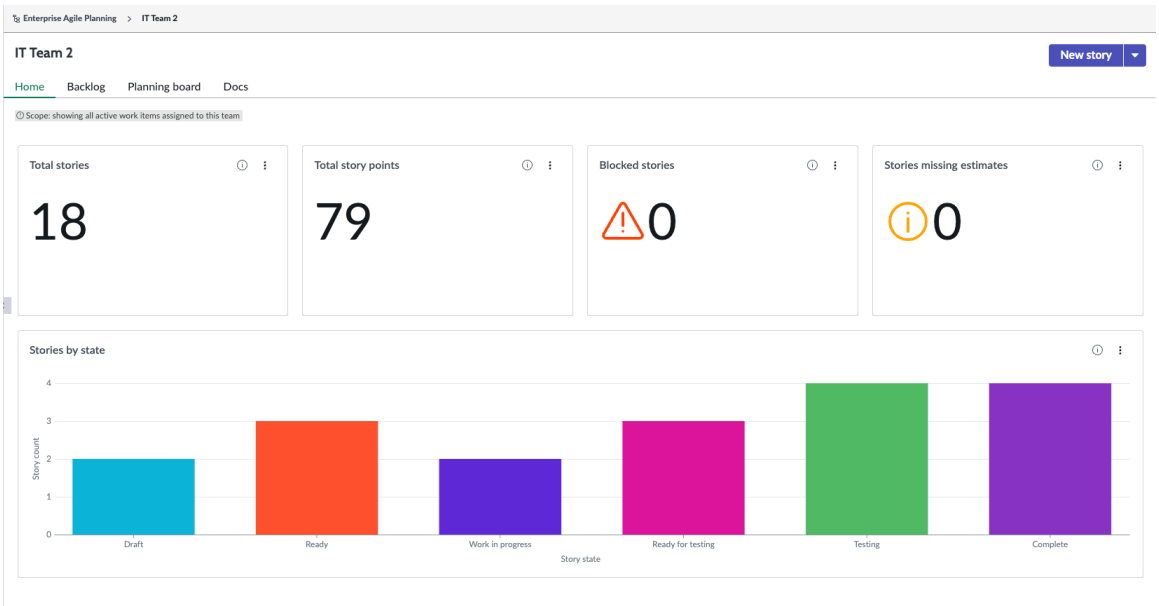
Title	Type	Source table	Description
		• EAP: Sum of story points of completed stories in the current iteration. • EAP: Sum of story points of all the stories in the current iteration	current pace. This report can help you analyze if the scope can be completed before the end of the sprint.
Avg velocity per sprint	Single Score 	sn_apw_advanced_eap_iteration	Number of story points the team can complete per sprint. Using this metric, you can evaluate the team's average performance.
Velocity	Trend 	sn_apw_advanced_eap_iteration	Trend of story points completed by this team in the past 90 days.
Story cycle time	Bubble chart 	sn_apw_advanced_story_cycle_time	Time taken for each story to move from an in-progress state to completion. Each bubble on the graph represents a story and the graph shows stories completed in the past 30 days. The height of the bubble from the x-axis shows the time (in days) to move from an in-progress state to completion. The size of the story bubbles is relative to each other based on their story points. Pointing your cursor to a bubble on that chart shows story data such as story points, duration in days to complete, and name. You can compare the cycle times of stories

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Title	Type	Source table	Description
			with different story points and analyze the trend in the time taken by the team to complete them. **Note:** The cycle time chart currently doesn't support selecting the story bubble to drill down into the stories.

Kanban Team dashboard in EAP

The Kanban Team Dashboard in EAP provides the work item status and progress metrics for the Agile teams following the Kanban configuration in the Enterprise Agile Planning (EAP) workspace.



Required EAP roles

sn_apw_advanced.eap_read_only or the sn_apw_advanced.eap_user.

Access the Kanban Team dashboard

To open the dashboard:

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Enterprise Agile Planning**.
2. From the Agile structure section of the navigation panel, choose your Kanban EAP Portfolio.
3. Select the **Home** tab.

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Use cases

For examples of how different people in your organization would use this dashboard, see these use cases.

User	Dashboard use
• Portfolio manager • Product manager • Team lead • Team member	View the progress and status of the work items assigned to your Kanban team.

Reports

Title	Type	Source table	Description
Total stories	Single Score 	rm_story	Number of stories assigned to this team.
Total story points	Single Score 	rm_story	Sum of points of all stories assigned to this team.
Blocked stories	Single Score 	rm_story	Number of stories that are assigned to this team and that are blocked.
Stories missing estimates	Single Score 	rm_story	Number of stories assigned to this team that don't have story points.

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Title	Type	Source table	Description
Stories by state	Bar graph 	rm_story	Stories assigned to this team, grouped by their current state.

Enterprise Agile Planning reference

Reference topics provide additional information about the lists, forms, roles, tables, and other components that you use to configure and use Enterprise Agile Planning (EAP).

Components installed with Enterprise Agile Planning

Several types of components are installed with Enterprise Agile Planning when you install the Strategic Planning applications, including tables and user roles.

Roles installed

Role title [name]	Description	Contains roles
EAP admin [sn_apw_advanced.eap_admin]	Can add teams to EAP configurations or remove them.	sn_apw_advanced.eap_user
EAP user [sn_apw_advanced.eap_user]	• Can create, update, and delete work items • Can create and modify iterations like Planning Intervals and Sprints • Can access the team's Backlog and Planning Board	• scrum_master • sn_apw_advanced.eap_read_only • now_assist_panel_user This role is available only with the Now Assist for SPM plugin, which is activated using the SPM Pro+ license.
EAP read-only role [sn_apw_advanced.eap_read_only]	Can view the EAP team's Backlog and Planning Board	• scrum_user • workspace_user • canvas_user

Tables installed

Table	Description
Agile Release Train [sn_apw_advanced_agile_release_train]	Stores information of all Agile Release Trains created for the Agile structure of an EAP configuration.

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Table	Description
	This table extends the Enterprise agile team [sn_apw_advanced_eap_team] table.
Agile Team [sn_apw_advanced_agile_team]	Stores information of all Agile Teams created for the Agile structure of an EAP configuration. This table extends the Enterprise agile team [sn_apw_advanced_eap_team] table.
Capability [sn_align_core_capability]	Stores information of all Capability type of work items created in EAP. This table extends the EAP planning item [sn_align_core_eap_planning_item] table.
EAP planning item [sn_align_core_eap_planning_item]	Base table for all EAP work item types. This table extends the Planning Item Entry [sn_align_core_planning_item] table.
Enterprise agile calendar [sn_apw_advanced_eap_calendar]	Stores information of iteration types such as Planning Intervals and Sprints. This table extends the Business Calendar [business_calendar] table.
Enterprise agile calendar entry [sn_apw_advanced_eap_calendar_span]	Stores information of the timeline defined or date span for calendar entries of a business calendar span. For example, for a Sprint calendar type, six calendar entries spanning over three months can be created. This table stores the date spans for each of these Sprint calendar entries. This table extends the Business Calendar Entry [business_calendar_span] table.
Enterprise agile configuration (sn_apw_advanced_eap_configuration)	Stores information of agile configurations such as Full configuration, Portfolio configuration, and other default and custom configurations.
Enterprise agile configuration detail [sn_apw_advanced_eap_configuration_detail]	Stores the details of the default work item type and planning calendar associated with a team type for a configuration. It also stores: • Team hierarchy in the Agile structure for a configuration. • Work item type available on the Backlog and Planning board pages.
Enterprise agile iteration	Stores the details of team-level iterations details such as capacity, total points, State, and others.

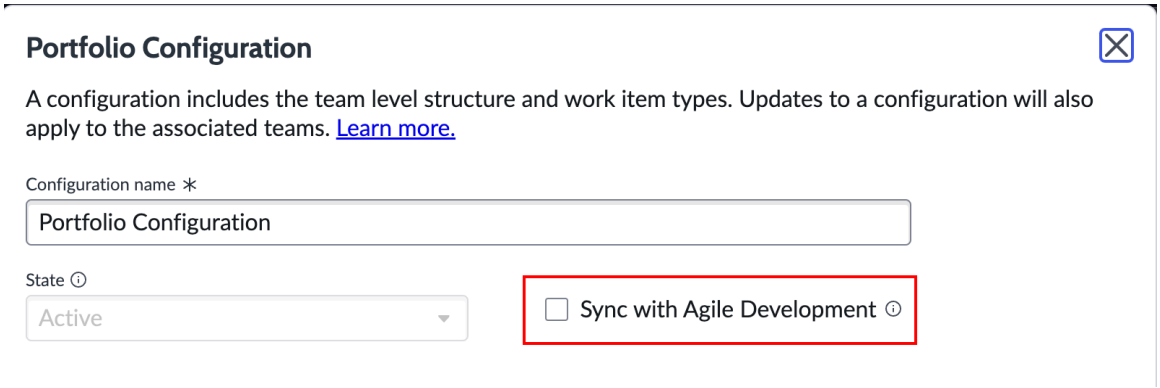
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Table	Description
[sn_apw_advanced_eap_iteration]	
Enterprise agile iteration type [sn_apw_advanced_eap_iteration_type]	Stores the information about planning calendar types such as Planning Intervals or Sprints.
Enterprise agile team [sn_apw_advanced_eap_team]	Base table for all EAP teams such as ART, Solution Trains, Agile Release Trains, and Portfolios created in the Agile structure for a configuration.
Enterprise agile team structure [sn_apw_advanced_eap_team_structure]	Contains information of team hierarchy.
Enterprise agile work structure [sn_apw_advanced_eap_work_structure]	Contains information of work item type hierarchy.
Epic [sn_align_core_scrum_epic]	Stores information of all Epic work items created in EAP. This table extends the EAP planning item [sn_align_core_eap_planning_item] table.
Feature [sn_align_core_feature]	Stores information of all Feature work items created in EAP. This table extends the EAP planning item [sn_align_core_eap_planning_item] table.
Solution Train [sn_apw_advanced_solution_train]	Stores information of all Solution Trains created for the Agile structure of an EAP configuration. This table extends the Enterprise agile team [sn_apw_advanced_eap_team] table.
SAFe Portfolio [sn_apw_advanced_eap_portfolio]	Stores information of all Portfolios created for the Agile structure of an EAP configuration. This table extends the Enterprise agile team [sn_apw_advanced_eap_team] table.
Story [rm_story]	Stores information of all stories created. This table is installed with the Agile Development 2.0 application, which is installed with Strategic Planning.

Integration between EAP and Agile Development 2.0

While setting up a configuration in Enterprise Agile Planning, you can establish an integration with Agile Development 2.0. Learn more about the tables connected and the way you access the information.

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In the EAP configuration form, when you enable the **Sync with Agile Development** option, information of the following tables is synced between the two apps.

EAP tables	Agile Development 2.0 tables
Enterprise agile iteration [sn_apw_advanced_eap_iteration]	Sprint [rm_sprint]

When this sync is established for a configuration, the following are the functionality changes:

Sprint creation and updates

- Creating a Sprint is suggested to be done from EAP.
- Creating a Sprint in EAP creates a related Sprint in Agile Development 2.0.

  If the dates of the Sprint in EAP overlap with a record in the rm_sprint table, then a new Sprint isn't created for Agile Development 2.0. You can either choose to create sprints for non-overlapping dates or delete the existing sprint from the rm_sprint table.
- Fields of planned start and end dates for Sprints in Agile Development 2.0 become read-only, and are derived from the business calendar spans mapped to the iterations in EAP.
- Updating Sprint details in EAP updates the corresponding Sprint details in Agile Development 2.0.
- Deleting Sprints from EAP deletes the corresponding record from the Sprint [rm_sprint] table.
- On the Sprint [rm_sprint] table, reference fields are created for parent of the EAP iteration and the EAP team this iteration belongs to.

Story creation and updates

- All Stories scheduled for any Sprints in this configuration can be accessed in Sprints of Agile Development 2.0.

  You can track the progress of this Sprint from the Agile board.
- Any changes made to the story details or its progress are visible in both the applications.

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- On the Story [rm_story] table, reference fields are created for EAP team, iteration, configuration, and parent work item in the EAP fields related list.
- If a story is rescheduled to a different sprint or moved to the Backlog on the Agile board, it's updated in EAP and vice versa.

Note:
The Story records for EAP are by default saved in the Story [rm_story] table, which is installed with the Agile Development 2.0 plugin.

Team type form

Learn about the fields of the new table form that are required to add a new team type in Enterprise Agile Planning.

New table form

Field	Description
Label	Unique label for the table.
Name	This field is auto-generated from your input in the **Label field**.
Application	This field is automatically set to **Portfolio Planning Core** based on your scope. If this field shows a different value, then set the scope of your ServiceNow instance to **Portfolio Planning Core**.
Extends table	Select **Enterprise agile team**.

Controls section of the New team type form

Field	Description
User role	Set this field to **sn_apw_advanced.eap_user** so that you grant access to the EAP user to this table.

Application Access section of the New team type form

Application Access
Enable the **Can read**, **Can create**, **Can update**, and **Can delete** fields.

Related topics

Create a custom team type in EAP

Work item type form

Learn about the fields of the new table form that are required to add a new work item type in Enterprise Agile Planning.

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New table form

Field	Description
Label	Unique label for the table.
Name	This field is auto-generated from your input in the **Label field**.
Application	This field is automatically set to **Portfolio Planning Core** based on your scope. If this field shows a different value, then set the scope of your ServiceNow instance to **Portfolio Planning Core**.
Extends table	Select **EAP planning item**.

Controls section of the Work item type form

Field	Description
User role	Set this field to **sn_apw_advanced.eap_user** so that you grant access to the EAP user to this table.

Application Access section of the Work item type form

Application Access
Enable the **Can read**, **Can create**, **Can update**, and **Can delete** fields.

Related topics

- Create a custom work item type in EAP
- Agile configurations in EAP

SAFe-EAP migration request form

Learn about the fields of SAFe-EAP migration form. Use this form to submit a request to migrate Scaled Agile Framework data to Enterprise Agile Planning.

SAFe-EAP migration request form

Field	Description
Request name	A unique name for the migration request.
EAP configuration	Configuration in EAP that matches with your SAFe configuration. For example, if you're using Portfolio SAFe in your ServiceNow instance, select **Portfolio configuration**.
SAFe table	Data from the SAFe table that you want to migrate to EAP.

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SAFe-EAP migration request form (continued)

Field	Description
	• If you select **Portfolio**, the data from SAFe Portfolio tables, their immediate child ARTs, SAFe teams, and the iterations and work items associated with them will be migrated. • If you select **ART**, the data from ART tables, their parent Portfolios, child SAFe teams, and the iterations and work items associated with them will be migrated.
Filter records	SAFe portfolios/ARTs that match the filter conditions will be displayed for selection.
Records available for migration	Records that match the filter conditions that you applied in the previous field are displayed in the Available list for you to choose from. Only the records that are moved to the Selected list are considered for migration.
PIs starting on or after	Program Increments with planned start date falling on or after the selected date are migrated.
Work items update after	Epics, Features and Stories updated after the selected date are migrated.
Status	Status of the migration request.

Related topics

Start migration of SAFe data to EAP

Migrating from SAFe to EAP

Enterprise Agile Planning Indicators

Indicators included in the EAP dashboard.

Indicator	Description	Version added
EAP: Sum of story points of completed stories in current iteration	Sum of story points of completed stories in current iteration is measured daily as unit.	Washington DC
EAP: Sum of story points of all stories in the current iteration	Sum of story points of all stories in the current iteration is measured daily as unit.	Washington DC
EAP: Sum of story points of active stories in the current iteration	Sum of story points of active stories in the current iteration is measured daily as unit.	Washington DC

For information about the metrics you can view on the EAP dashboard through these indicators, see EAP reports and dashboards.

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Work item reorder errors in EAP Backlog

Review the scenarios when the reordering of work items can fail in the Backlog of Enterprise Agile Planning workspace.

While reordering work items in different sections of the EAP Backlog, the reorder can fail due to an error in the ranking configuration. Following are the scenarios where reordering of work items can fail:

Scenario 1: Global ranking plugin is not active

Check if the Global Ranking Application plugin (com.snc.sdlc.ranking) is active in your ServiceNow instance. If not, contact your admin to activate it.

Scenario 2: Work item doesn't have a rank configuration

Check if all the work items that you are reordering have a rank configuration. If not, contact your admin to update rank configuration for these work item types.

Scenario 3: Target row doesn't have a global rank

Check if the work item before or after your target position to reorder has a global rank. If not, contact your system admin to generate a global rank for them.

Dashboards in Strategic Planning Workspace

Dashboards in Strategic Planning Workspace help product and portfolio managers monitor performance, track progress, and make informed decisions related to ideas, feedback, strategy, planning, and execution.

Explore	Use	Integrate
		
Learn the key benefits of using dashboards in Strategic Planning	Learn how to use dashboards and monitor performance, track progress, and make informed decisions	Add existing Platform Analytics dashboards to Strategic Planning Workspace

Troubleshoot and get help

- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Dashboards in Strategic Planning Workspace

As a product and portfolio manager, use dashboards in Strategic Planning Workspace to monitor performance, track progress, and make informed decisions related to ideas, feedback, strategy, planning, and execution. These dashboards leverage Platform Analytics to provide a trend of historical data and regular reports.

The following are four out-of-the-box dashboards available in the Strategic Planning Workspace:

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- Product Idea Dashboard
- Feedback Dashboard
- Strategy Execution Dashboard
- Execution Dashboard

You can use the default dashboards or create your own dashboards to monitor performance and take informed decisions.

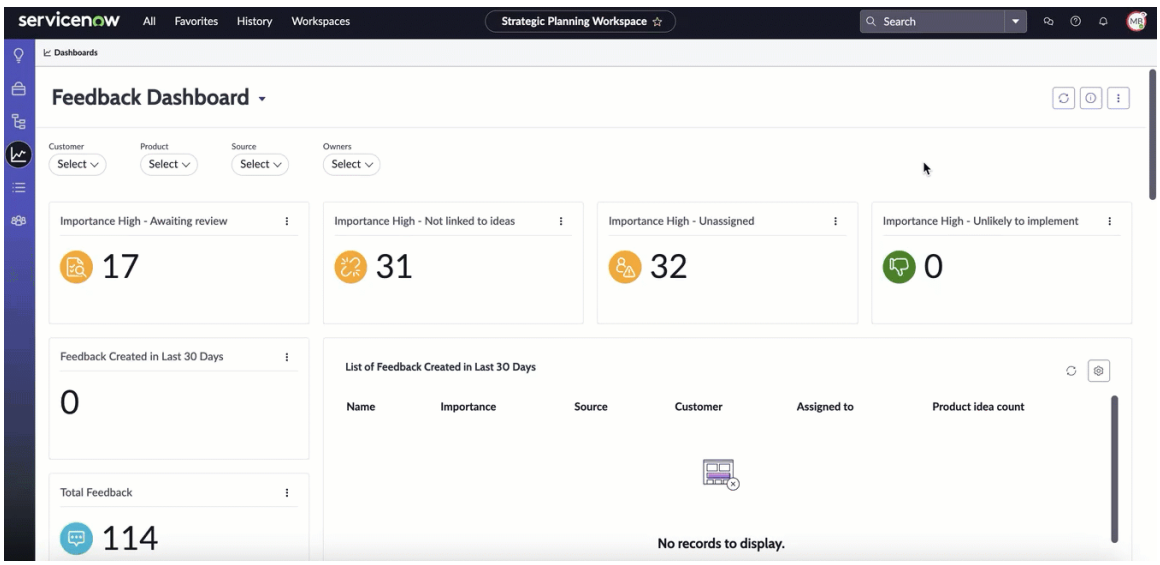
Benefits of dashboards

- Create data visualizations and add them to the dashboards using the Platform Analytics experience.
- Monitor performance, track progress, and make informed decisions related to ideas, feedback, strategy, planning, and execution.
- Duplicate existing dashboards and customize them as needed, without modifying the out-of-the-box dashboards.
- Use the out-of-the-box dashboards or configure your own dashboards as needed.
- Share dashboards with stakeholders to enable collaboration.
- View relevant data by applying filters directly within a dashboard.
- Any filters applied are saved as part of user personalization and are available the next time you log in.

For guidance on using and managing dashboards in the Strategic Planning Workspace, see Using Dashboards in Strategic Planning Workspace.

Feedback Dashboard in Strategic Planning

The Feedback Dashboard helps product managers track feedback volume and stakeholder trends to surface recurring pain points, inform prioritization decisions, and demonstrate responsiveness.



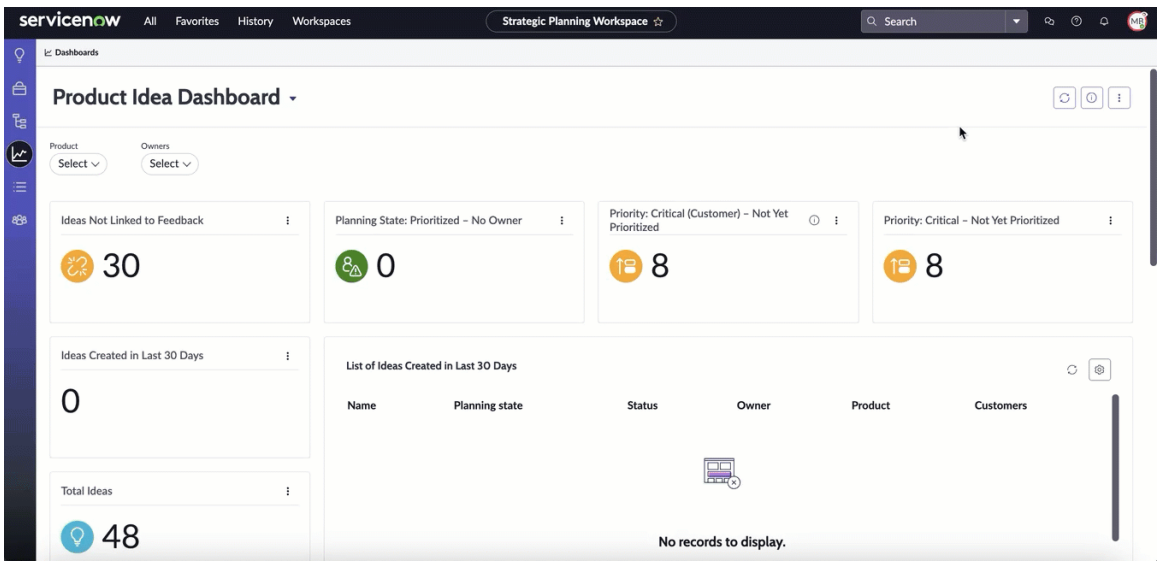
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Feedback Dashboard

Widget/Visualization	Description
Importance High - Awaiting review	Count of feedback items with high importance (1-High) and a state of either Submitted or Need More Information.
Importance High - Not linked to ideas	Count of feedback items with high importance (1-High) that are not linked to any ideas.
Importance High - Unassigned	Count of feedback items with high importance (1-High) that are not assigned to anyone.
Importance High - Unlikely to implement	Count of feedback items with high importance (1-High) and a state of Unlikely to Implement.
Feedback Created in Last 30 Days	Count of feedback items created within the last 30 days.
List of Feedback Created in Last 30 Days	List of feedback items created within the last 30 days, including details such as Name, Importance, Source, Customer, Assigned to, and Product idea count.
Total Feedback	Total number of feedback items received to date.
Feedback Distribution	Visualization of feedback items with grouped by Importance and stacked by Customer.
Overall Feedback Distribution	Visualization of feedback items with grouped by Importance.
Feedback Linked to Ideas in the Last 30 Days	Visualization of feedback items linked to ideas within the last 30 days and grouped by Importance.
Feedback Count by Location	Count of feedback items by location.

Product Idea Dashboard in Strategic Planning

The Product Idea Dashboard helps product managers understand the health, flow, and maturity of submitted ideas, helping innovations progress and preventing backlog bottlenecks.



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Product Idea Dashboard

Widget/Visualization	Description
Ideas Not Linked to Feedback	Count of ideas that are not linked to any feedback.
Planning State: Prioritized – No Owner	Count of ideas whose planning state is Prioritized but that have no assigned owner.
Priority: Critical (Customer) – Not Yet Prioritized	Count of ideas whose: • Planning state is not Prioritized or Done • Priority is 1-Critical, and • Customers field is populated
Priority: Critical – Not Yet Prioritized	Count of ideas whose: • Planning state is not Prioritized or Done, and • Priority is 1-Critical
Ideas Created in Last 30 Days	Count of ideas created within the last 30 days.
List of Ideas Created in Last 30 Days	List of ideas created within the last 30 days, including details such as Name, Planning state, Status, Owner, Product, and Customers.
Total Ideas	Total number of ideas received to date.
Breakdown of All Ideas	Visualization of all ideas with grouped by Planning state.
Breakdown: Ideas Not Linked to Feedback	Visualization of ideas not linked to feedback within the last 30 days and grouped by Planning state.
Idea Analyzer	Visualization of ideas with grouped by Impact and stacked by Priority.

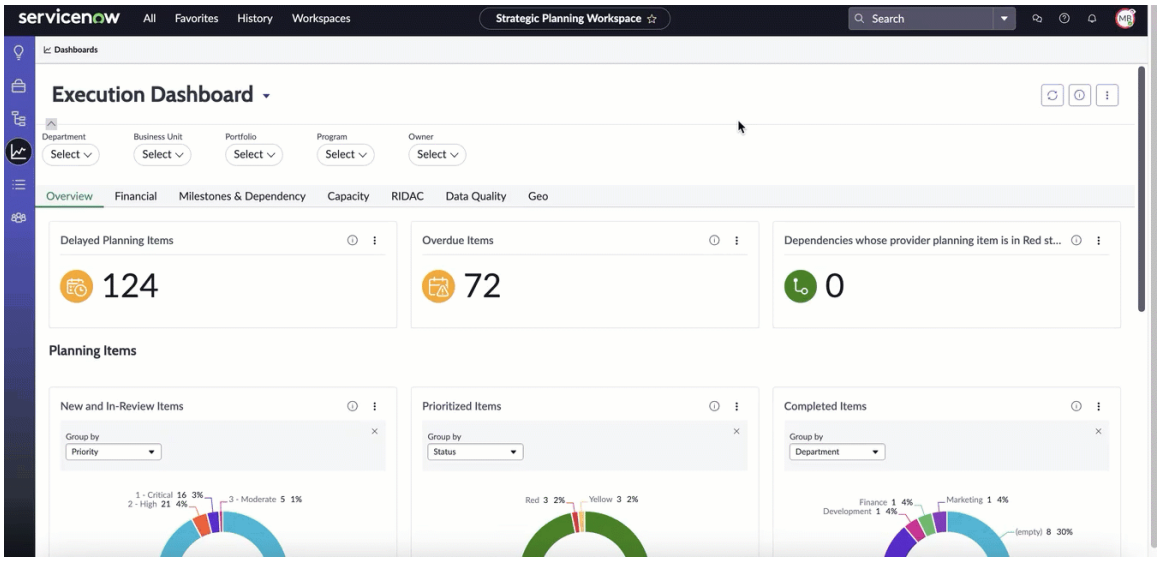
Execution Dashboard in Strategic Planning

The Execution Dashboard helps portfolio and product managers gain real-time visibility into delivery progress across work items, enabling portfolio leads to detect delays, course-correct early, and keep the strategy on track.

The Execution Dashboard provides various analytics across different tabs, including Overview, Financial, Milestones & Dependency, Capacity, RIDAC, Data Quality, and Geo.

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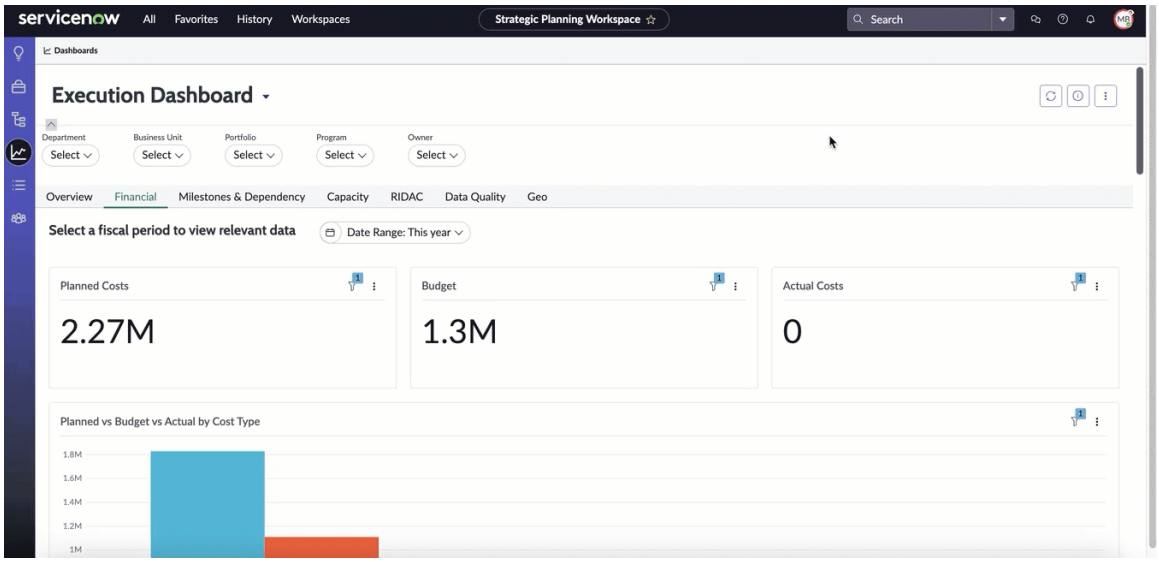
Overview tab in the Execution Dashboard



Widget/Visualization	Description
Delayed Planning Items	Planning items that were prioritized but haven't started yet (no recorded actual start date), despite having an approved start date in the past.
Overdue Items	Prioritized planning items that remain incomplete (no recorded actual end date), despite having an approved end date in the past.
Dependencies whose provider planning item is in Red status	Dependencies that have a provider planning item in red status, affecting all dependent planning items.
Planning Items	
New and In-Review Items	Visualization of new and in-review planning items grouped by Priority. You can also group the items using other available options.
Prioritized Items	Visualization of prioritized planning items grouped by Status. You can also group the items using other available options.
Completed Items	Visualization of planning items whose state is Done. You can also group the items using other available options.
Execution Items	
Projects	Visualization of projects count grouped by State. You can also group the items using other available options.
Demands	Visualization of demands count grouped by State. You can also group the items using other available options.

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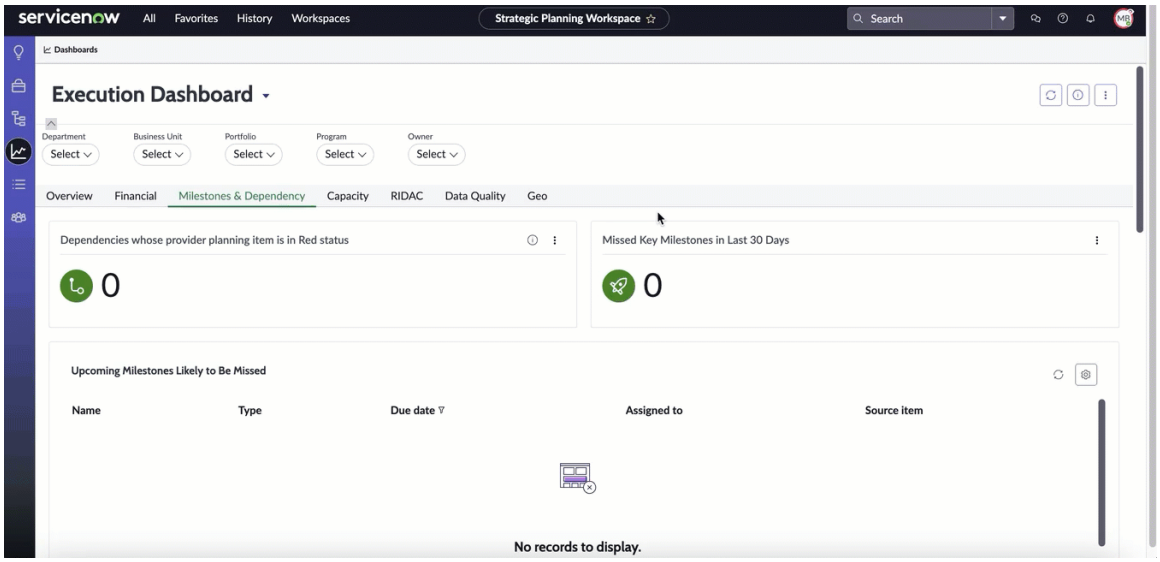
Financial tab in the Execution Dashboard



Widget/Visualization	Description
Select a fiscal period to view relevant data	Option to select date range as **This year** or **Last year** to filter and display the data accordingly. Clearing the date range displays the data considering from the start date of the portfolio plan.
Planned Costs	Estimated cost for executing the plan.
Budget	Estimated budget for executing the plan.
Actual Costs	Actual cost incurred during plan execution.
Planned vs Budget vs Actual by Cost Type	Visualization of Planned vs Budget vs Actuals by Cost Type.
Planned vs Budget vs Actual	Visualization of cost by Planned vs Budget vs Actual.
Budget by Investment Type	Visualization of budget by Investment type.
Benefits	
Planned Monetary Benefits	Monetary benefits that have been planned.
Actual Monetary Benefits.	Monetary benefits that have been achieved.
Pending Monetary Benefits.	Monetary benefits that are in pending state.
Benefits by Category	Benefits by category such as Revenue, Cost savings, and Customer satisfaction score.
Monetary Benefits	Visualization of monetary benefits with respect to planned and actual benefits.

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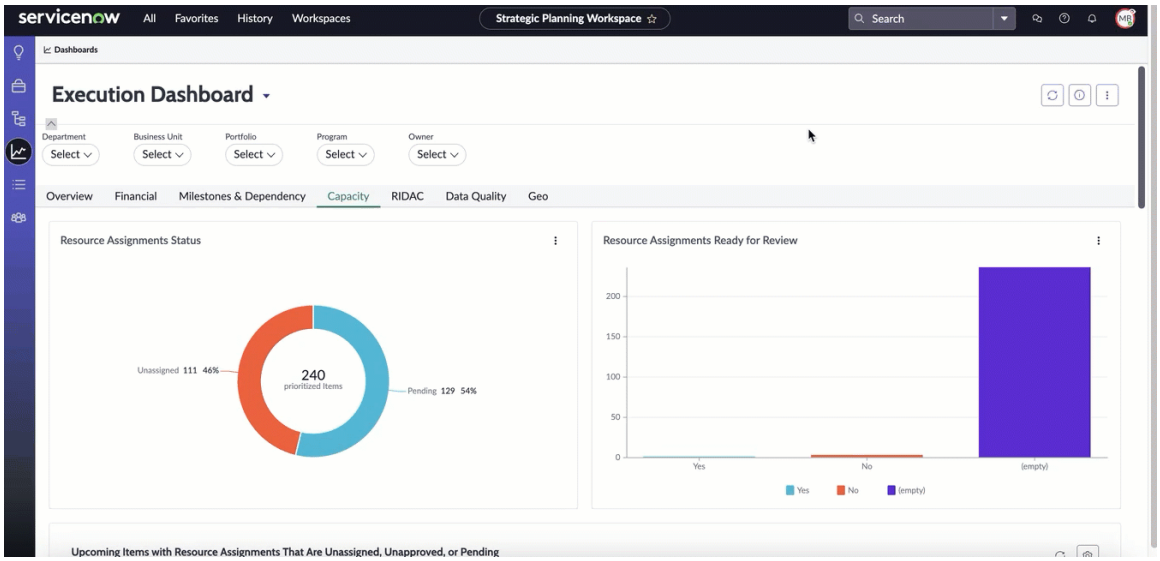
Milestones & Dependency tab in the Execution Dashboard



Widget/Visualization	Description
Dependencies whose provider planning item is in Red status	Count of dependencies that have a provider planning item in red status, affecting all dependent planning items.
Missed Key Milestones in Last 30 Days	Count of planning items whose key milestones were missed within the last 30 days.
Upcoming Milestones Likely to Be Missed	List of planning items whose key milestones about to be missed soon with details including Name, Type, Due date, Assigned to, Source item.
Missed Milestones in Last 30 Days	List of planning items whose key milestones were missed within the last 30 days with details including details, Name, Type, Due date, Assigned to, and Source item.
Achieved Milestones in Last 30 Days	List of planning items whose key milestones were achieved within the last 30 days with details including details, Name, Type, Due date, Assigned to, and Source item.
Milestones Analyzer	Visualization of key milestones grouped by state and stacked by Type. You can also group and stack the items using other available options.

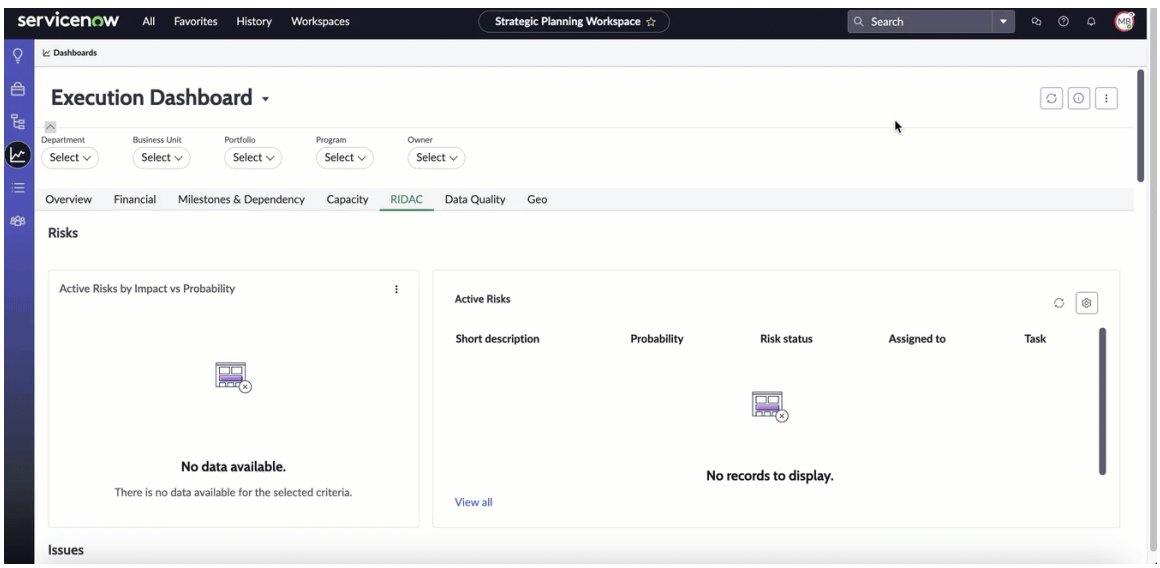
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Capacity tab in the Execution Dashboard



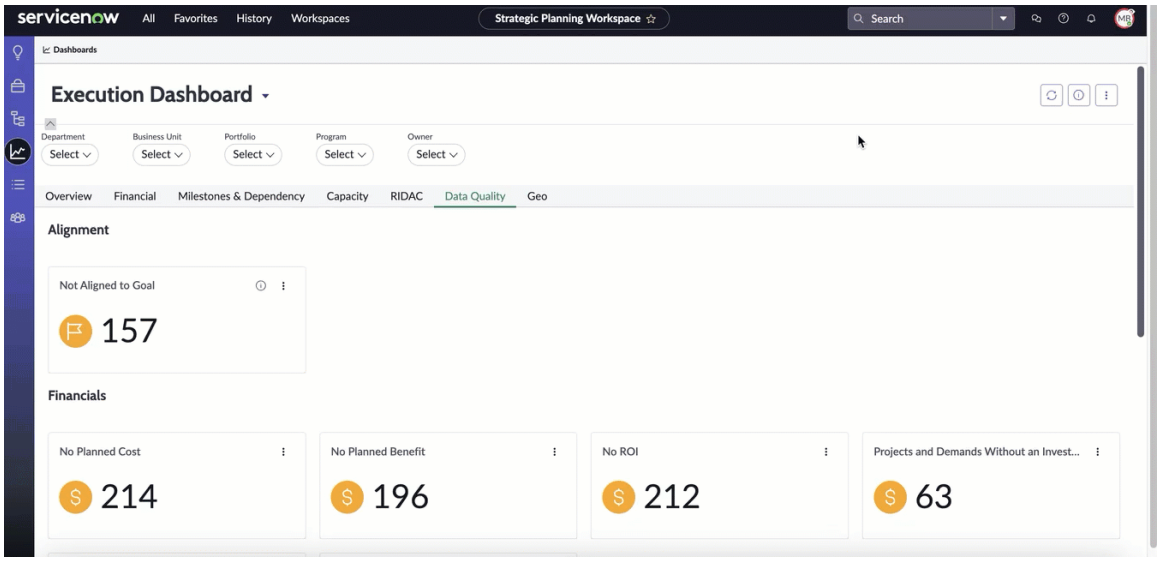
Widget/Visualization	Description
Resource Assignments Status	Visualization of resource assignments status.
Resource Assignments Ready for Review	Visualization of resource assignments count that is ready for review.
Upcoming Items with Resource Assignments That Are Unassigned, Unapproved, or Pending	List of upcoming planning items whose resource assignments status is Unassigned, Unapproved, or Pending.
Resource Assignments by Group, Role & Skill	Visualization of resource assignments count by their group, role, and skill.

RIDAC tab in the Execution Dashboard



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Data Quality tab in the Execution Dashboard



Widget/Visualization	Description
Alignment	
Not Aligned to Goal	Count of work items that aren't associated with any goal.
Financials	
No Planned Cost	Count of work items for which cost estimation is done yet for execution.
No Planned Benefit	Count of work items for which benefit estimation is done yet.
No ROI	Count of work items for which ROI isn't estimated yet.
Projects and Demands Without an Investment Type	Count of projects and demands for which Investment type isn't defined yet.
Monetary Benefit Plans Without a Planned Benefit	Count of monetary benefit plans for which benefit isn't defined yet.
Monetary Benefit Plans Without a Sponsor	Count of monetary benefit plans for which a sponsor hasn't been assigned yet.
Planning Items with Other Attributes	
No Resource Assignments	Count of planning items without resource assignments.
Unscheduled Items	Count of planning items not scheduled yet.
No Portfolio	Count of planning items with no portfolio defined.
No Program	Count of planning items with no program defined.
No Department	Count of planning items with no department populated.

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Widget/Visualization	Description
No Business Unit	Count of planning items with no business unit populated.
No Owner	Count of planning items with no owner assigned.

Geo tab in the Execution Dashboard

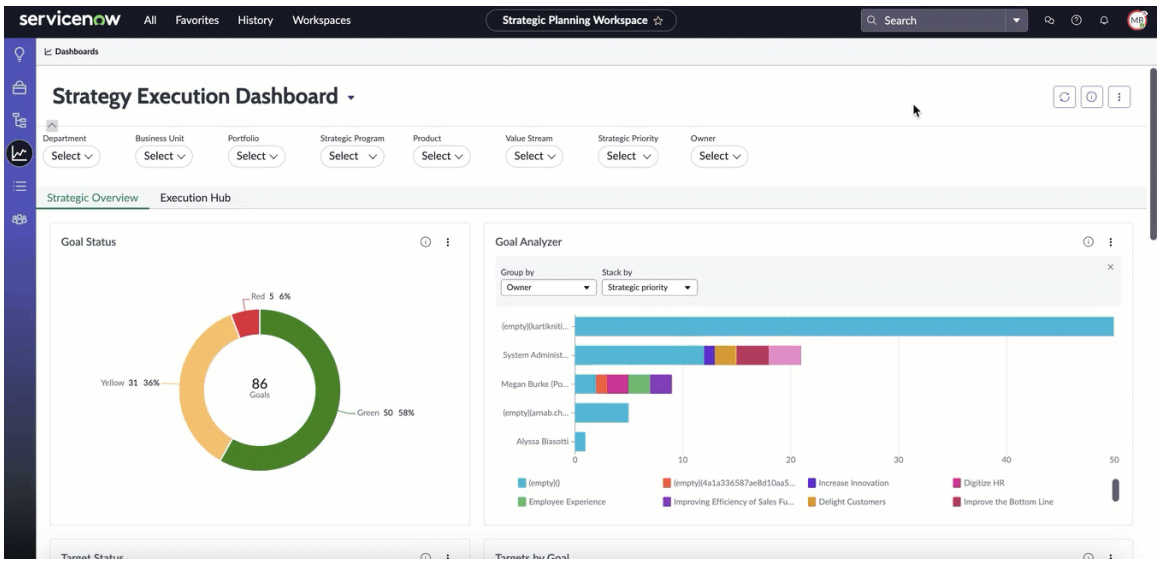
Widget/Visualization	Description
Planned cost by location	Estimated cost by location for executing the plan.

Strategy Execution Dashboard in Strategic Planning

The Strategy Execution Dashboard helps portfolio managers monitor the alignment between strategy and business outcomes, and quickly assess goal progress to ensure high-impact delivery.

The Strategy Execution Dashboard provides various analytics through the tabs and Execution Hub.

Strategic Overview tab in the Strategy Execution Dashboard



Strategic Overview tab of Strategy Execution Dashboard

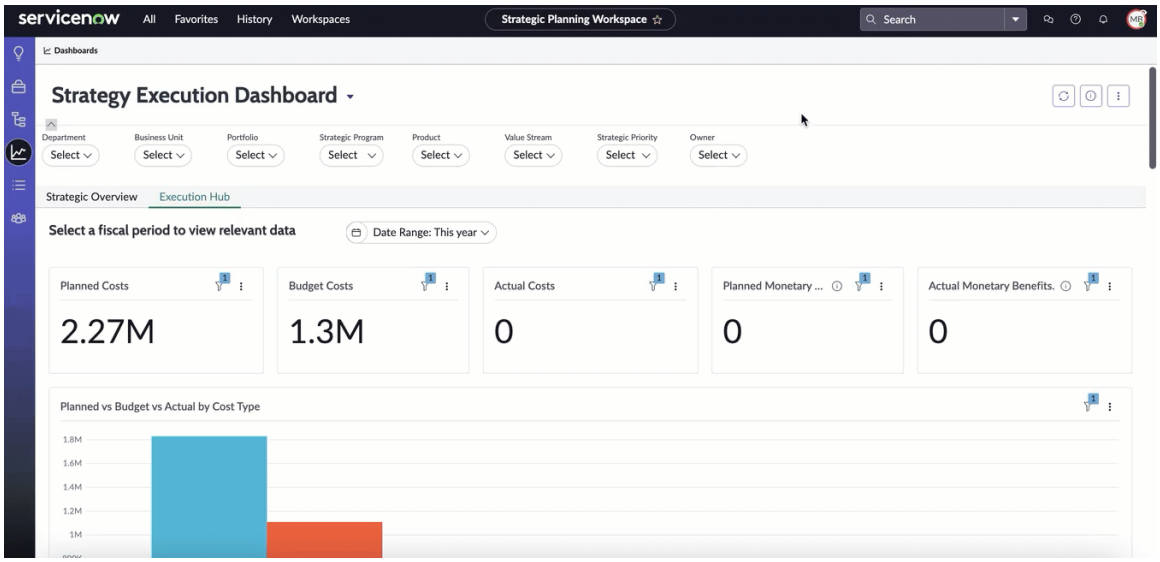
Widget/Visualization	Description
Goal Status	Goals that are In Progress or Approved, or have a status of Green, Yellow, or Red.
Goal Analyzer	Visualization of goals with grouped by Owner and stacked by Strategic priority.
Target Status	Visualization of targets count with their status as Red, Green, Yellow, and None.
Targets by Goal	Visualization of targets count with their goals.

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Strategic Overview tab of Strategy Execution Dashboard (continued)

Widget/Visualization	Description
Goals and Targets	List of goals and targets, including details such as Name, Status, and Progress.

Execution tab in the Strategy Execution Dashboard



Widget/Visualization	Description
Select a fiscal period to view relevant data	Option to select date range as **This year** or **Last year** to filter and display the data accordingly. Clearing the date range displays the data considering from the start date of the portfolio plan.
Planned Costs	Estimated cost for executing the plan.
Budget Costs	Estimated budget for executing the plan.
Actual Costs	Actual cost incurred during plan execution.
Planned Monetary Benefits	Monetary benefits that have been planned.
Actual Monetary Benefits	Monetary benefits that have been achieved.
Planned vs Budget vs Actual by Cost Type	Visualization of Planned vs Budget vs Actuals by Cost Type.
Budget by Investment type	Visualization of budget by Investment type.
Supplementary Data	
New and In-Review Items	Visualization of new and in-review planning items with grouped by Priority.
Prioritized Items	Visualization of prioritized planning items with grouped by Status.
Completed Items	Visualization of planning items whose state is Done.

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Widget/Visualization	Description
Delayed Planning Items	Planning items that were prioritized but haven't started yet (no recorded actual start date), despite having an approved start date in the past.
Items Overdue	Prioritized planning items that remain incomplete (no recorded actual end date), despite having an approved end date in the past.
Dependencies whose provider planning item is in Red status	Dependencies that have a provider planning item in red status, affecting all dependent planning items.
Missed Key Milestones in Last 30 Days	Count of planning items whose key milestones were missed within the last 30 days.
Upcoming Milestones Likely to Be Missed	List of planning items whose key milestones about to be missed soon with details including Name, Type, Due date, Assigned to, Source item.
Resource Assignments Status	Visualization of resource assignments status.
Resource Assignments Ready for Review	Visualization of resource assignments count that is ready for review.
Upcoming Items with Resource Assignments That Are Unassigned, Unapproved, or Pending	List of upcoming planning items whose resource assignments status is Unassigned, Unapproved, or Pending.

Using Dashboards in Strategic Planning Workspace

Using the Platform Analytics dashboards in Strategic Planning Workspace, you can monitor performance, track progress, and make informed decisions related to ideas, feedback, strategy, planning, and execution.

Roles required for managing dashboards

Required roles to access out-of-the-box dashboards

Access level	Required roles
Read, duplicate, or share the Strategy Execution Dashboard and Execution Dashboard	sn_align_core.ap_read_only **Note:** To view data in financial-related and capacity-planning-related widgets, users must have the appropriate roles.
Read, duplicate, or share the Product Idea Dashboard and Product Feedback Dashboard	pf_read
Edit the Strategy Execution Dashboard and Execution Dashboard	admin

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Required roles to access out-of-the-box dashboards (continued)

Access level	Required roles
Edit the Product Idea Dashboard and Product Feedback Dashboard	admin

Required roles to create or edit dashboards (excluding out-of-the-box dashboards)

Access level	Required roles
Create dashboards	sn_align_core.apw_user
Edit dashboards	sn_align_core.apw_user **Note:** You can edit dashboards that you own or those you've been granted permission to edit.

Note:
You can create widgets in dashboards by configuring any available data source table in the ServiceNow AI Platform. However, you must have read access to the source tables to view key data, metrics, or visualizations.

For example, if you create a widget in a dashboard configuring the Cost Plan Breakdown table to display budget data, the budget summary is visible on the dashboard only if you have read access to the Cost Plan Breakdown table. Similarly, when you share this dashboard with a stakeholder, the stakeholder must also have read access to the Cost Plan Breakdown table to view the budget summary.

For more information on the required roles to manage Platform Analytics dashboards, see Platform Analytics dashboard roles.

View a dashboard in Strategic Planning

View key data and metrics on a dashboard to monitor performance, track progress, and make informed decisions related to ideas, feedback, strategy, planning, and execution.

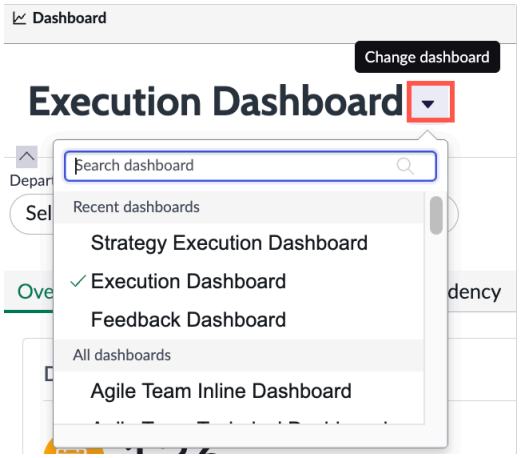
Before you begin
Role required: sn_align_core.ap_read_only

About this task
Dashboards consolidate data from multiple sources into a single, easily digestible format. Each widget within a dashboard displays key data and metrics and may include visualizations.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Dashboards**.
   By default, the Execution Dashboard appears on the Dashboards page.
2. From the Change dashboard drop-down, select the dashboard you want to view.

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The selected dashboard appears.

3. **Optional:** Select a required tab that you want to view the key data and metrics for.
   Each widget within a dashboard displays key data and metrics and may include visualizations.
4. **Optional:** Select a widget to see more details of the data in list view.
   If you have edit access, you can update the details of an individual record directly from the list view when necessary.

Related topics

Create a dashboard in Strategic Planning

Duplicate a dashboard in Strategic Planning

Share a dashboard in Strategic Planning

Add a Platform Analytics dashboard to Strategic Planning Workspace

Create a dashboard in Strategic Planning

In the Platform Analytics experience, you can create sharable dashboards with data visualizations, filters, and other elements. You can use the available elements in the inline editor to create different types of widgets as needed.

Before you begin

Role required: sn_align_core.apw_user

About this task

Dashboards consolidate data from multiple sources into a single, easily digestible format. Each widget within a dashboard displays key data and metrics and may include visualizations.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Dashboards**.
   By default, the Execution Dashboard appears on the Dashboards page.
2. From the dashboard header, select the More actions icon (⋮) and then select **Create new**.
3. On the New dashboard window, fill the details.
   a. Enter a name for the dashboard in the **Name** field.
   b. **Optional:** Enter a brief description for the dashboard in the **Description** field.
   c. Select **Create new dashboard**.

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What to do next

Edit a dashboard as needed by adding sections, filters, images, lists, process mining maps, and rich text. For more information, see Edit a dashboard in Strategic Planning.

Related topics

- View a dashboard in Strategic Planning
- Duplicate a dashboard in Strategic Planning
- Share a dashboard in Strategic Planning
- Add a Platform Analytics dashboard to Strategic Planning Workspace

Edit a dashboard in Strategic Planning

Customize or edit a dashboard as needed by adding sections, filters, images, lists, process mining maps, and rich text. If the dashboard has been shared, any changes you make are applied globally.

Before you begin

Role required: sn_align_core.apw_user

About this task

Note:

- You can edit dashboards that you own or those you've been granted permission to edit.
- Only an administrator can edit the out-of-the-box dashboards, including the Product Idea Dashboard, Feedback Dashboard, Strategy Execution Dashboard, and Execution Dashboard. However, you can duplicate an out-of-the-box dashboard and customize it as needed.

You can use the following elements to create or edit your dashboard.

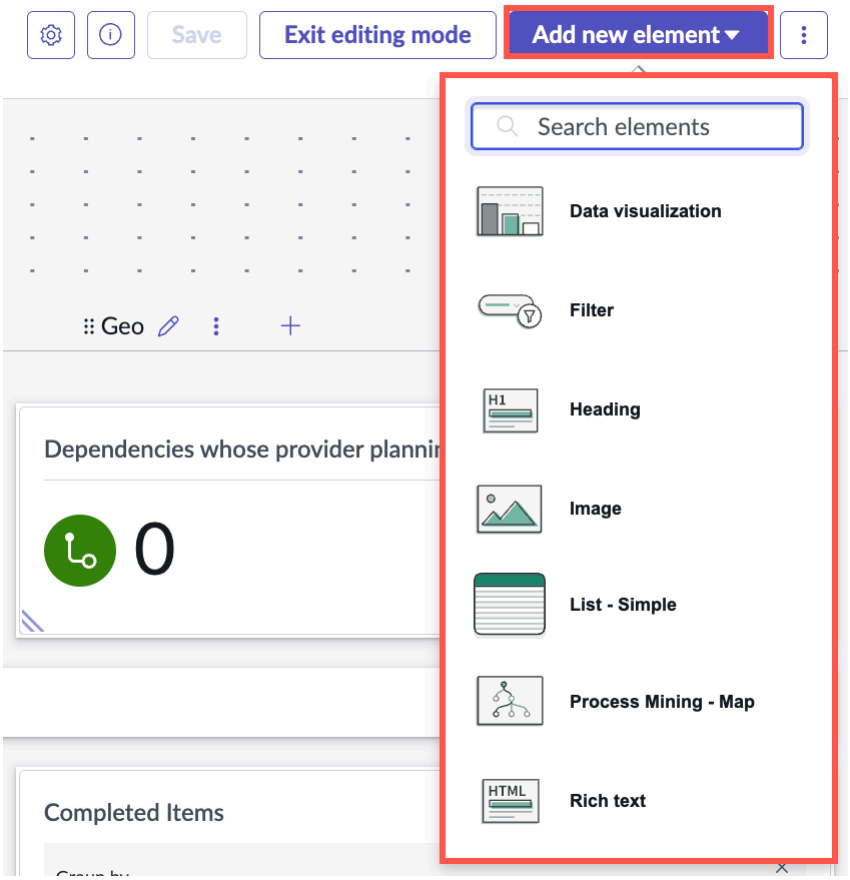
Dashboard elements in Strategic Planning

Element	Description
Data visualization	Enables you to present a visual representation of current instance data or temporary data that you've imported. Data visualizations include visualizations that you create in the dashboard designer and data visualizations from the library.
Filter	Enables you to filter the visualizations on a dashboard based on specified criteria. You can put filters either on the individual tabs or above the tabs so that the filter applies to elements every tab. Filters include both data filters and domain filters. You can create filters in the dashboard designer or select them from the library.
Heading	Provides a place for text at the top of a dashboard or section of a dashboard. Formatting for headings is limited to six heading levels.

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Dashboard elements in Strategic Planning (continued)

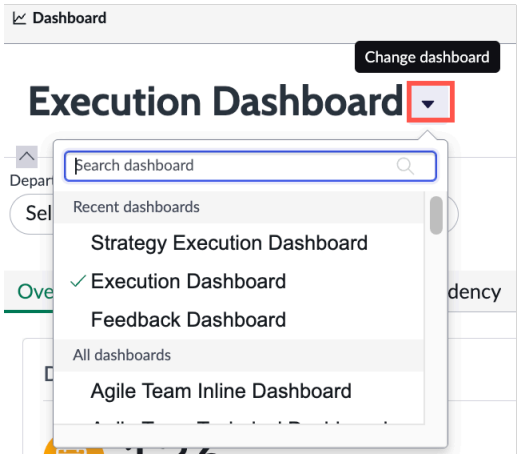
Element	Description
Image	Holds static or animated images on the dashboard.
List - Simple	Shows table data that you can customize for the dashboard audience.
Process Mining - Map	Maps the different states that are part of your process and the transitions between those states. See which states the objects of the process are in and the speed with which they change state. Requires an existing Process Mining project.
Rich text	Holds text that you can format either as text or as html, including font selection, text size, highlighting, and hyperlinks. To edit HTML markup, open the HTML editor from the Configuration panel and select the Code tags < > icon.



Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Dashboards**.
   By default, the Execution Dashboard appears on the Dashboards page.
2. From the Change dashboard drop-down, select the dashboard you want to edit.

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The selected dashboard appears.

3. From the dashboard header, select **Edit**.
4. Drag to move the widget or resize it as required.
5. From the dashboard header, select **Save**.
6. From the dashboard header, select **Exit editing mode**.

Result
The dashboard is updated with the latest changes.

What to do next
- Add more elements and customize your dashboard as required.
- For detailed instructions on editing a dashboard using the Platform Analytics experience in Strategic Planning, see Edit Platform Analytics dashboards.

Related topics
View a dashboard in Strategic Planning

Create a dashboard in Strategic Planning

Duplicate a dashboard in Strategic Planning

Share a dashboard in Strategic Planning

Add a Platform Analytics dashboard to Strategic Planning Workspace

Duplicate a dashboard in Strategic Planning
If the dashboard you want to create is similar to an existing one, duplicating the existing dashboard saves your time. After duplicating the dashboard, you can customize the tabs and widgets as required.

Before you begin
- Users or groups that you want to share the dashboard with must have the sn_align_core.ap_read_only or sn_align_core.apw_user role to get the read or edit access to the portfolio plan respectively.
- When you duplicate a dashboard, you copy all settings and details of the original. Content that exists locally on the original dashboard is duplicated onto the new dashboard. If the original

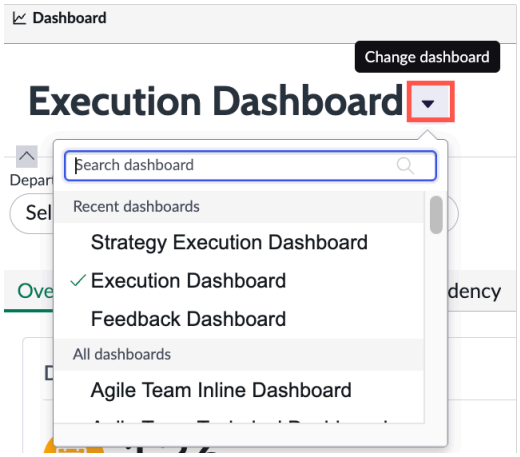
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dashboard contains references to content in a library, such as a shared visualization, the references are duplicated. The role requirements for editing an element in a library apply to the latter.

Role required: sn_align_core.ap_read_only

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Dashboards**.
   By default, the Execution Dashboard appears on the Dashboards page.
2. From the Change dashboard drop-down, select the dashboard that you want to duplicate.



   The selected dashboard appears.

3. From the dashboard header, select the More actions icon (⋮) and then select **Duplicate**.
4. On the Duplicating dashboard window, fill the details.

   a. Enter a name for the portfolio plan in the **New name** field.
   By default, the name is *ABC (Copy)* where ABC is the name of the dashboard you duplicated from.

   b. **Optional:** Enter a brief description of the goal in the **Description** field.

   c. Select **Duplicate**.

   Duplicating the dashboard may take some time. Select **Continue in background** to keep using the application in the meantime.

Result

The dashboard is copied with the new name. The appearance of the dashboard is identical to the original.

What to do next

Edit a dashboard as needed by adding sections, filters, images, lists, process mining maps, and rich text. For more information, see Edit a dashboard in Strategic Planning.

Related topics

View a dashboard in Strategic Planning

Create a dashboard in Strategic Planning

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Share a dashboard in Strategic Planning

Add a Platform Analytics dashboard to Strategic Planning Workspace

Share a dashboard in Strategic Planning

Share a dashboard with stakeholders, planning managers, portfolio managers, or product managers to provide visibility into work progress and foster collaboration. You can grant either view-only rights or both view and edit rights to a shared dashboard.

Before you begin

Role required: sn_align_core.ap_read_only

About this task

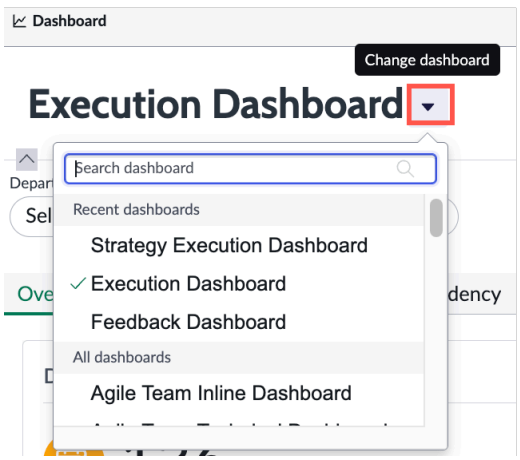
Users or groups you want to share the dashboard with must have the appropriate roles assigned to access shared dashboards:

Required roles to access dashboards

Dashboard	Role required
• Strategy Execution Dashboard • Execution Dashboard	sn_align_core.ap_read_only **Note:** To view data in financial-related and capacity-planning-related widgets, users must have the appropriate roles.
• Product Idea Dashboard • Product Feedback Dashboard	pf_read

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Dashboards**.
   By default, the Execution Dashboard appears on the Dashboards page.
2. From the Change dashboard drop-down, select the dashboard you want to share.



   The selected dashboard appears.
3. From the dashboard header, select the More actions icon (⋮) and then select **Share**.
4. On the Share Dashboard window, fill the details.

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a. Enter a user name or group name in the **Grant access to** field to provide access to individual users or user groups, respectively.
You can also select a role to grant dashboard access to all users assigned that role.

b. **Optional:** Select **Allow recipients to add, edit, or delete sharing permissions associated with this dashboard** to enable users to grant access to new users and modify or remove existing permissions.

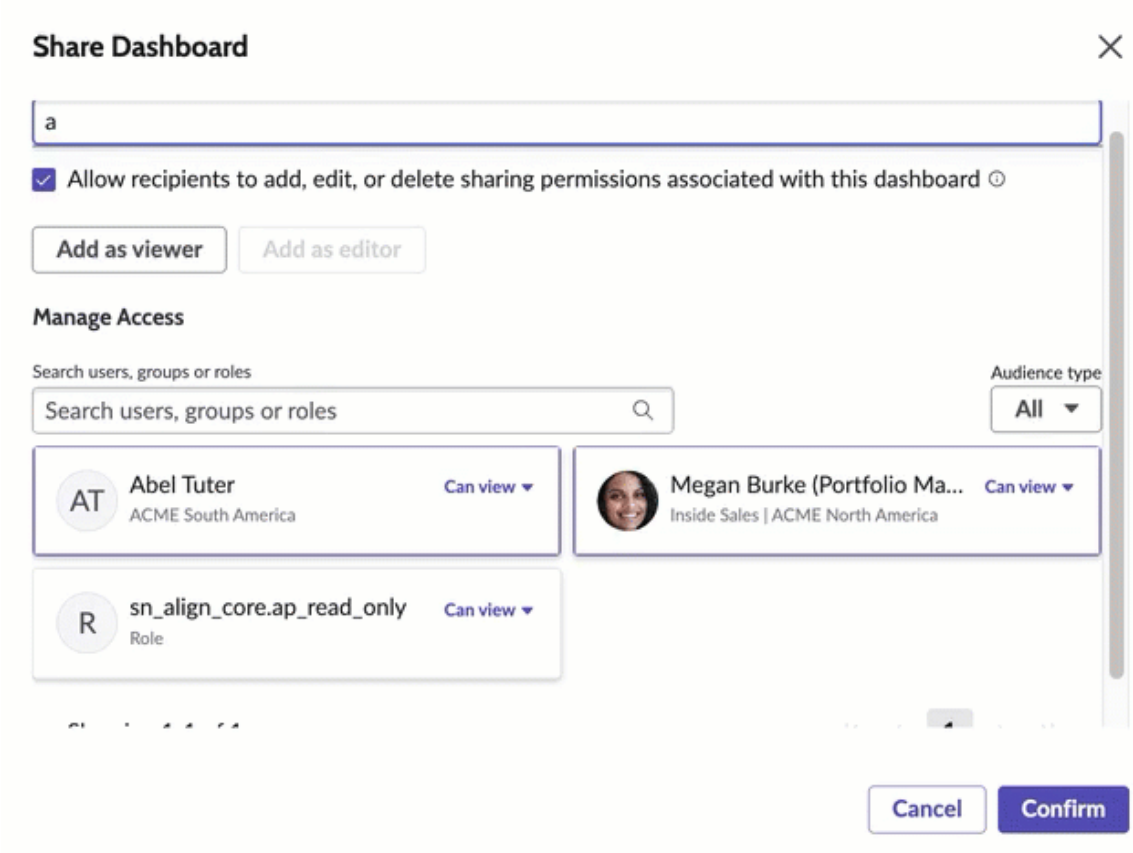
c. Select **Add as viewer** or **Add as editor** as required.

> **Note:**
> You can select **Add as editor** only if you have the sn_align_core.apw_user role assigned to you.

The selected users, groups, and roles appear under **Manage Access**.

You can also manage sharing permissions by selecting a user, group, or role and enabling the **Can share** option.

d. Select **Confirm**.



Result

The roles, groups, and users you have shared the dashboard with appear when you reopen the dialog, along with the rights you have given them.

What to do next

You can change the rights of whom you have shared the dashboard with in the Share Dashboard dialog, under the Can view/Can share list for each user, group, or role.

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Related topics

- View a dashboard in Strategic Planning
- Create a dashboard in Strategic Planning
- Duplicate a dashboard in Strategic Planning
- Add a Platform Analytics dashboard to Strategic Planning Workspace

Add a Platform Analytics dashboard to Strategic Planning Workspace

If you have existing dashboards created using Platform Analytics, you can add them to the Strategic Planning Workspace to access them directly from a single location.

Before you begin

Role required: sn_align_core.apw_user

About this task

You can add any Platform Analytics dashboard to Strategic Planning Workspace.

Procedure

1. Navigate to **All** > **Platform Analytics** > **Analytics Center**.
   The Dashboards section appears on the page.
2. Select a bookmarked or certified dashboard from the **Bookmarked** or **Certified** tabs, respectively.
   If the dashboard you want to add is not bookmarked or certified, select **View all** from the Dashboards section, and then select the dashboard from the Dashboards page.

   The selected dashboard appears.
3. From the dashboard header, select **Edit**.
4. From the dashboard header, select the View dashboard details icon ( ).
   a. In the Details side panel, fill in the **Dashboard visibility** field with Strategic Planning Workspace.
5. From the dashboard header, select **Save**.
6. From the dashboard header, select **Exit editing mode**.

Result

The dashboard appears in the Strategic Planning Workspace.

Related topics

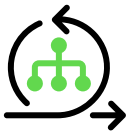
- View a dashboard in Strategic Planning
- Create a dashboard in Strategic Planning
- Duplicate a dashboard in Strategic Planning
- Share a dashboard in Strategic Planning

Now Assist for Strategic Portfolio Management (SPM)

Use the ServiceNow® Now Assist for Strategic Portfolio Management (SPM) application to summarize feedback in Strategic Planning or text in Docs, create a demand with a conversational experience, generate a concise project summary for projects, and generate stories from epics. Product, project, and demand managers can use the Now Assist skills and AI agents to streamline their projects and workflows.

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Get started

Explore  Learn more about Now Assist for SPM	Configure  Configure the application to get started with Now Assist for SPM	Use AI agents  Use the generative AI agents of Now Assist for SPM
Use  Use the generative AI capabilities of Now Assist for SPM	Reference  Learn about forms and fields of Now Assist for SPM	

Important:

- Not all model providers are available for customers with in-country SKUs, and some Now Assist products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some Now Assist products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base . Be sure to check for availability updates in future releases.
- Some Now Assist products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

Troubleshoot and get help

- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Further, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm,

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and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. In addition, this application will collect task data (for Case Assist) and chat transcripts (for Chat Assist). Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

For more information, see the Now Assist documentation.

Exploring Now Assist for Strategic Portfolio Management (SPM)

Use Now Assist for Strategic Portfolio Management (SPM) in multiple SPM workspaces to includes the skills and features of generative AI that help you enhance productivity while reducing the time and effort that you put in to work on the same tasks manually. You can also schedule an email to receive project summaries of your projects.

Skills

The Now Assist for SPM application includes the generative AI skills and features that enable your product, project, portfolio, and demand managers to leverage Now Assist skills so that they can streamline their processes and workflows.

Refine planning items content using write planning item skill

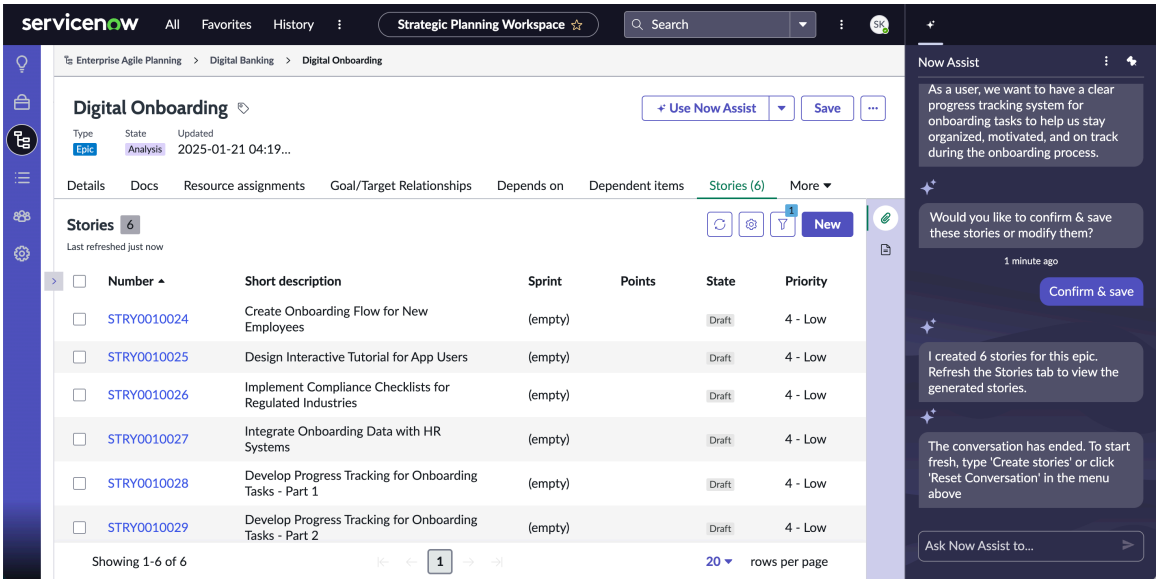
Improve record quality by enabling AI assistance in the description field across these Strategic Planning Workspace forms: Product idea, Demand, Epic, Project, Capability, Feature, and Story. You can enable text refinement with the **Elaborate** and **Shorten** options on planning items to support product managers and agile team members in creating and editing content more effectively.

Agile story generation

Generates high-quality story recommendations for an epic or feature using the Agile story generation skill in the EAP workspace. Now Assist uses the name, description, Docs content, and any existing stories of the epic or feature to provide story recommendations. Based on the recommendations, you can ask Now Assist to perform one of the following:

- Split a story recommendation into multiple stories.
- Combine multiple story recommendations into one story.
- Generate stories according to its original recommendations.
- Remove any story recommendation.
- Suggest modification of details within the recommendation such as story title, persona, and description.
- Suggest generating a new story recommendation.

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Thus, by using the Story generation skill of Now Assist, you can:

- Remove initial roadblocks to create stories for an epic or a feature.
- Save time and increase productivity by automating the story creation process.
- Ensure completeness of stories by covering personas, outcomes, and acceptance criteria.

The Agile story generation skill is supported starting with the Yokohama patch 3 release. If you are on earlier versions of the Yokohama release, you can activate the Story generation skill, which generates stories from Epics only.

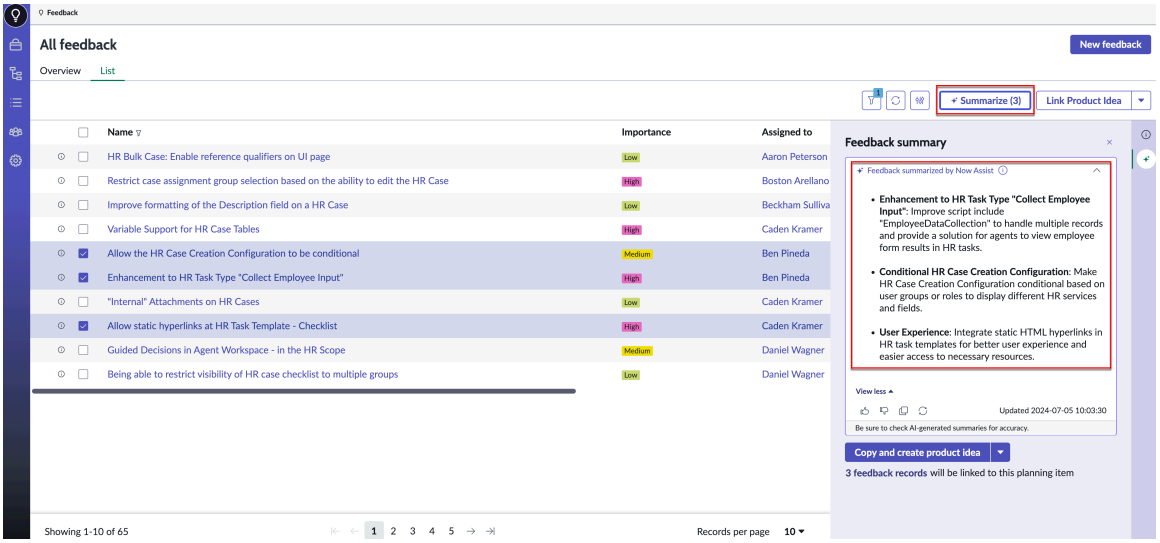
Multi feedback summarization or Feedback summarization

Provides your product managers with a concise and informative summary of the lengthy customer feedback comments. The product managers can generate a summary from the name and description of one or multiple feedback records so that they can quickly understand the feedback context. The generated summary can be directly converted to an execution item. Now Assist can generate a summary from the feedback only if the feedback has at least 60 words in the fields that are used for the input data. The 60-word minimum optimizes the experience by verifying that there's enough information to make a summary.

The following example shows a summarization of multiple feedback records by using the multi feedback summarization skill.

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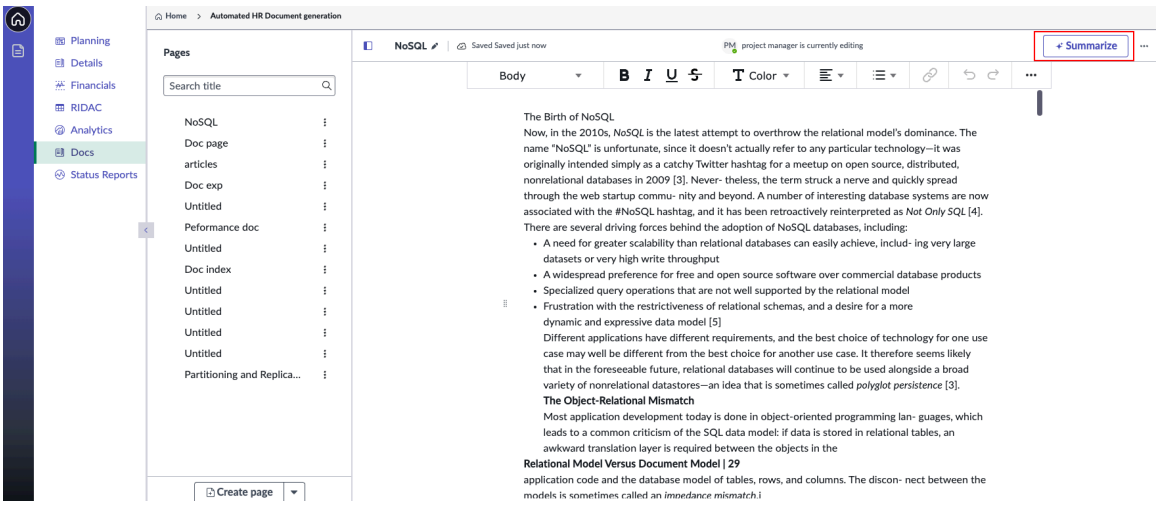
Multi feedback summarization skill



Project doc summarization, Planning Item doc summarization, or EAP doc summarization

Provides your product managers with a concise and informative summary of the selected or complete text by using Now Assist in Docs. Your product managers can summarize, elaborate, or shorten the selected or complete content on Docs to quickly understand the key information by using the Project doc summarization (Project Workspace), Planning item doc summarization (Strategic Planning), or EAP doc summarization (Enterprise Agile Planning) skill.

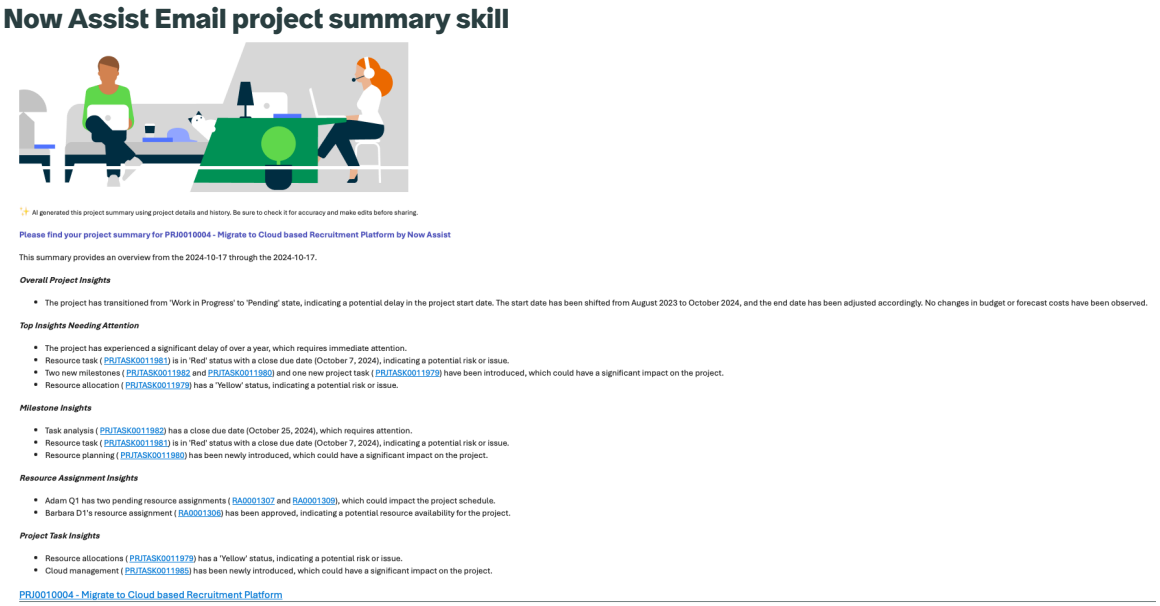
Now Assist in Docs



Email project summary

Monitor the progress and changes in each project through the Email project summary skill. With minimal effort, your project managers can schedule a cadence for generating a project summary and receive it via email. They can track key elements such as the milestones, resource assignments, projects, and project tasks. They can also prioritize key elements to focus on. They can also decide the cadence of receiving project summary emails.

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Conversational experiences for demand creation.

Simplify the process of creating a Demand within the Employee Service Management (ESC) portal by using the Now Assist conversational catalog creation capability.

- Avoid searching through the list of catalog items to find the right item for demand creation.
- Answer contextual questions in the chat to auto-populate the relevant fields in the Demand form.

If Microsoft Teams and Mobile are enabled as a display location for Now Assist in Virtual Agent, users can use the conversational experience to create a demand in those applications too.

Note:
This skill is available within the Platform category of the Now Assist Admin console.

Now Assist Admin console

An administrator can use the Now Assist Admin console in Strategic Planning Workspace to activate and manage Now Assist features and skills in Workspace. For more information about the Now Assist Admin console, see Now Assist Admin console.

AI agents

The ServiceNow AI agents use LLMs (Large Language Models) to process tasks, from basic responses to complex problem-solving and optimize the live agent workflows. For more information on Now Assist AI agents, see Using AI agent agentic workflows in Now Assist for Strategic Portfolio Management (SPM).

Related topics

Exploring Now Assist

Configure Now Assist for Strategic Portfolio Management (SPM)

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Using Now Assist for Strategic Portfolio Management (SPM)

Using AI agent agentic workflows in Now Assist for Strategic Portfolio Management (SPM)

Now Assist for SPM reference

AI Agent Studio

Supporting information for Now Assist for Strategic Portfolio Management (SPM)

Get a quick overview of the important information that is related to the Now Assist for Strategic Portfolio Management (SPM) application.

Supported versions

The Now Assist for SPM application is supported starting with the Xanadu patch 3 release.

Supported user interfaces

The Now Assist for SPM application is supported for the Strategic Planning Workspace, Project Workspace, and Enterprise Agile Planning.

Licensing requirements

The Now Assist for SPM application requires an SPM Pro plus license.

Application information

Activate the latest Now Assist for SPM (sn_spm_gen_ai) store app to use the Now Assist skills.

This store app has the following dependencies:

- Now Assist for Platform (sn_genai_platform)
- Strategic Planning
- Project Workspace
- Enterprise Agile Planning

For more information, see Configure Now Assist for Strategic Portfolio Management (SPM).

Related topics

Exploring Now Assist for Strategic Portfolio Management (SPM)

Configure Now Assist for Strategic Portfolio Management (SPM)

Using Now Assist for Strategic Portfolio Management (SPM)

Now Assist for SPM reference

Using AI agent agentic workflows in Now Assist for Strategic Portfolio Management (SPM)

Configure Now Assist for Strategic Portfolio Management (SPM)

If you have the admin role, you can configure the Now Assist for Strategic Portfolio Management (SPM) application to enable generative AI skills in Strategic Planning, Project Workspace, or Enterprise Agile Planning.

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Before you begin

To enable the Agile story generation skill for Enterprise Agile Planning, complete the following tasks:

- Turn on the Now Assist panel.
- Ensure AI Search is activated and ready to use by navigating to **All** > **AI Search** > **AI Search Status**

Role required: admin

About this task

Use the Now Assist Admin console to configure Now Assist for SPM. This console contains everything that you need to activate the plugins and configure the generative AI skills. For additional information, see Now Assist Admin console.

The following table lists the features and skills that you can access from the Now Assist Admin console.

SPM features and skills in the Now Assist Admin console

SPM feature	Skill
Feedback	• Feedback summarization • Multi feedback summarization
Demand	Conversational experiences for demand creation
Docs	• Project doc summarization (Project Workspace) • Planning item doc summarization (Strategic Planning) • EAP doc summarization (Enterprise Agile Planning)
Project	Email project summary
Stories	Agile story generation The Agile story generation skill is supported starting with the Yokohama patch 3 release and Strategic Planning v4.7.0. If you are on earlier versions of the Yokohama release, you can activate the Story generation skill, which inlcudes generating stories from Epics only.
Product idea, Demand, Epic, Project, Capability, Feature, or Story	Write Planning item

Note:
Now LLM Service is the default provider for this Now Assist application's skills.

The Now Assist for SPM application and conversational experiences for demand creation system requirements are as follows:

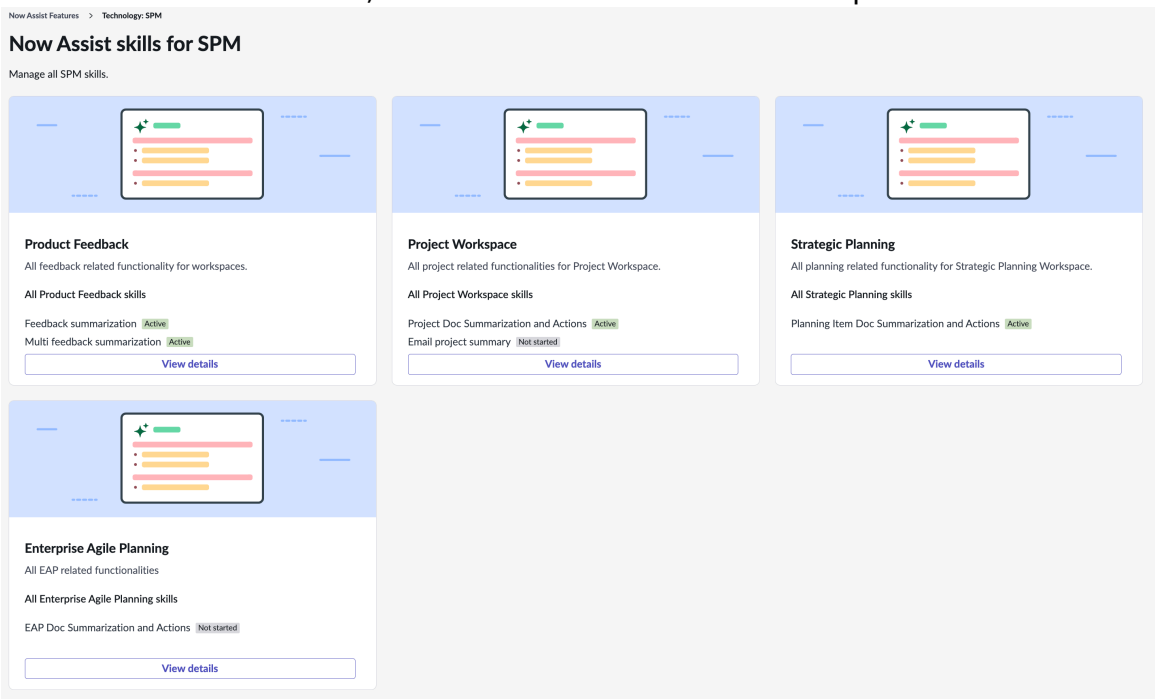
- Now Assist for Platform
- Strategic Planning

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- Project Workspace
- SPM Pro Plus license

Procedure

1. Install the Now Assist for Strategic Portfolio Management (SPM) plugin (sn_spm_gen_ai).
   - For information about the application dependencies, see Supporting information for Now Assist for Strategic Portfolio Management (SPM).
   - For information about the installation process, see Install Now Assist plugins.
2. Navigate to **All** > **Now Assist Skills**
   If you're already in the Now Assist Admin console, you can select the **Now Assist Skills** tab on the screen.
3. Select the **Technology** category and then select SPM.
4. From the Now assist skill card, select **Activate skill** to activate the required skill.



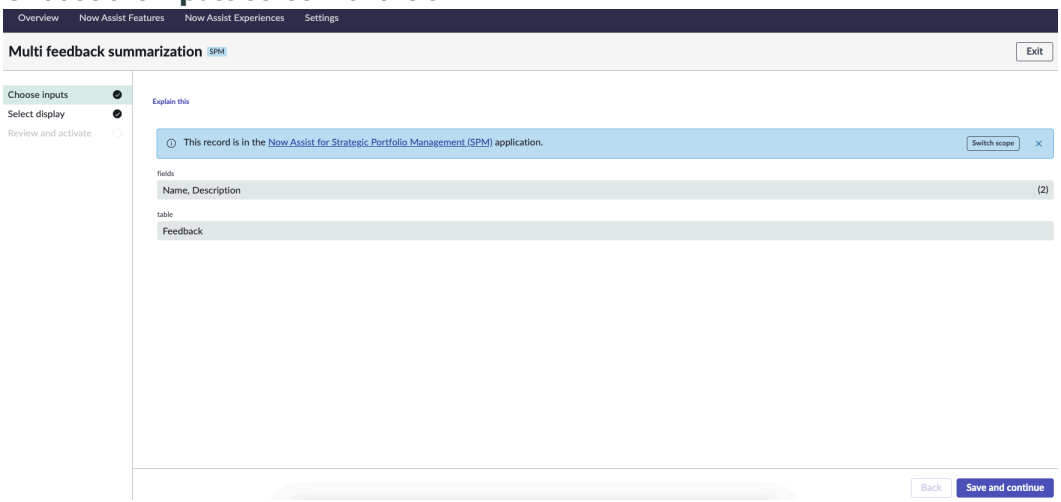
5. Review the inputs and display parameters for the selected skill.

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a. **Choose inputs**:

- Review the data source, such as the tables and fields. The inputs for most skills are selected by default and can't be modified. For information about the inputs for each skill, see Skill inputs for Now Assist for Strategic Portfolio Management (SPM).

Choose the Inputs screen for the skill



- Select **Save and continue**.

b. **Select display**: Review where the skill appears.

- **In-product desktop**: Enabling this option shows the skill within the Strategic Planning workspace.
- **Now Assist panel**: Enabling this option shows the skill within the Now Assist panel when launched from the Strategic Planning workspace.

> **Note:**
> The display options are available based on the skill.

- Select **Save and continue**.

c. **Review and activate**: Review the summary of your choices activate the skill by selecting **Activate**.

For more information on the skill inputs, see Skill inputs for Now Assist for Strategic Portfolio Management (SPM).

6. Repeat the process to activate any other available skills for SPM.

Result

The skill is configured and activated.

Related topics

Using Now Assist for Strategic Portfolio Management (SPM)

Now Assist Admin console

Configuring Now Assist settings and features

Skill inputs for Now Assist for Strategic Portfolio Management (SPM)

Learn about the inputs of each skill for the Now Assist for Strategic Portfolio Management (SPM) application. By configuring the inputs for a skill, you can determine how and when a skill is used.

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Now Assist for Strategic Portfolio Management (SPM) Overview

Depending on the selected skill, you can configure inputs. These settings determine how a skill is used. An input identifies the data that is used for a skill, such as the table and fields that are used to generate a feedback summary. If you have the admin role and any input fields are editable, you can modify the input data for a skill.

Feedback summarization skill inputs

The feedback summarization skill includes the inputs that identify the table and fields that are used when a feedback summary is generated. The data source contains the tables and fields that the skill relies on. The following table lists the inputs for the feedback summarization skill.

Inputs for the feedback summarization skill

Input	Description
Table	Feedback [sn_align_core_feedback]
Fields	• Name • Description

Agile story generation skill inputs

The Agile story generation skill includes the inputs that identify the table and fields that are used to generate story recommendations for epics and features. The following table provides more details on the input data.

Epic input data for the Agile story generation skill

Input	Description
Table	Epic [sn_align_core_scrum_epic]
Fields	• Name • Description
Maximum stories to generate	This is the default number of stories that Now Assist recommends when a user prompts to create stories for an epic. If you have the admin role, you can modify this number. Choose from 3, 4, and 5.

Feature input data for the Agile story generation skill

Input	Description
Table	Feature [sn_align_core_feature]
Fields	• Name • Description

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Feature input data for the Agile story generation skill (continued)

Input	Description
Maximum stories to generate	This is the default number of stories that Now Assist recommends when a user prompts to create stories for a feature. If you have the admin role, you can modify this number. Choose from 3, 4, and 5.

Write planning items skill inputs

Input data for the writing planning item skill

Input	Description
Planning item fields	Description
Story fields	• Description • Acceptance criteria
Table	Product idea [sn_align_core_product_idea] Demand [sn_align_core_demand] Capability [sn_align_core_capability] Epic [sn_align_core_scrum_epic] Project [sn_align_core_project] Feature [sn_align_core_feature] Story [rm_story]

Related topics

- Configure Now Assist for Strategic Portfolio Management (SPM)
- Exploring Now Assist for Strategic Portfolio Management (SPM)
- Using AI agent agentic workflows in Now Assist for Strategic Portfolio Management (SPM)
- Using Now Assist for Strategic Portfolio Management (SPM)
- Now Assist for SPM reference

Enable conversational demand creation using Now Assist in Virtual Agent

Activate the required skills and learn about required configuration to enable creating a demand through Agent assist in Virtual Agent using the conversational experience.

Before you begin

Role required: admin

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Procedure

1. Navigate to **All** > **Now Assist Admin** > **Skills**.
2. Select the **Platform** category.
3. On the Now Assist Multi-Turn Catalog Ordering skill card, select **Turn on**.

What to do next

- Ensure that AI Search is installed and provisioned for your instance. Navigate to **All** > **AI Search** > **AI Search Status**
- Set up Now Assist in Virtual Agent. See Configuring Now Assist in Virtual Agent.
- You can add or modify the question prompts to be asked by Agent assist in Virtual Agent while creating a demand for the user. See Configure the questions for demand creation in Now Assist for Strategic Portfolio Management (SPM).

Configure the questions for demand creation in Now Assist for Strategic Portfolio Management (SPM)

Add a new or modify an existing question for Now Assist in Virtual Agent while creating a demand in the Now Assist for Strategic Portfolio Management (SPM) application.

Before you begin

Ensure that the following plugins are installed:

- Now Assist for Platform (v4.0.2)
- Now Assist for IT Service Management (ITSM)
- Now Assist in Conversational Catalog Request

> **Note:**
> Installing Now Assist in Conversational Catalog Request automatically installs all the other dependent plugins.

- Activate the Conversational experience skill.
- Configure Now Assist in Virtual Agent. For more information, see Configure Now Assist in Virtual Agent.

> **Note:**
> If Microsoft Teams and Mobile are enabled as a display location for Now Assist in Virtual Agent, your end user can use the conversational experience to create a demand in those applications too.

Role required: admin or catalog_admin

Procedure

1. Navigate to **All** > **Service Catalog** > **Catalog Administration** > **Conversational catalog overview**.
2. Select the **Create a New Demand** catalog item.
3. Identify any unsupported conversational catalog item question types and suggestions to make them conversational by selecting **Now Assist for Virtual Agent**.

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For information on unsupported fields, see Configure Now Assist in Conversational Catalog Request.

4. Review the existing questions in the Variables related list and add or modify questions by selecting **Edit in advanced view**.

Update the project summary header and footer of your email using script include

Use the script include to modifying the email template for project summary.

Before you begin

Ensure the Now Assist for SPM is installed and email project summary skill is active.

Role required: admin

Procedure

1. Navigate to **All** > **System UI** > **Script Includes**.
2. Open the *ProjectInsightsEmailTemplateCustomConstants* script include and update the *ProjectInsightsEmailTemplateCustomConstants.EMAIL_HEADER_HTML* constant for email's header.

   This example demonstrates the script include for email's header as follows:

```
ProjectInsightsEmailTemplateCustomConstants.EMAIL_HEADER_HTML
= `<p><span style="color: white;"><a
href="https://www.servicenow.com/" target="_blank"
rel="noopener noreferrer nofollow"><span style="color:
white; text-decoration: none;"><span style="color:
blue;"><img style="height: 30px; width: 150px; border:
none;" src="sn_spm_gen_ai.sn-logo-project-insights.png"
alt="servicenow logo" height="30px"
border="0" /></span></span></a></span></p>`;
```

3. Update the *ProjectInsightsEmailTemplateCustomConstants.EMAIL_FOOTER_HTML* constant for email's footer.

   This example demonstrates the script include for email's footer as follows:

```
ProjectInsightsEmailTemplateCustomConstants.EMAIL_FOOTER_HTML
 = `<p style="border-top: 1px solid #293e40; line-height:
 0;"><span style="color: #999999;"> </span></p><div
 style="caret-color: #212121; color: #212121; font-family:
 Aptos; font-size: 16px; width: 100%; margin: 0 auto;
 padding: 0; background-color: #ffffff;">      <!-- Logo
 Section -->      <div style="line-height: 0.8;">
  <span>          <a href="https://www.servicenow.com/"
 target="_blank" rel="noopener noreferrer nofollow"
 style="text-decoration: none;">            <img
 src="sn_spm_gen_ai.sn-logo-project-insights.png"
 alt="servicenow logo" style="height: 20px; width: auto;
 border: none;" />          </a>        </span>      </div>
      <!-- Address and Footer Information -->      <div
 style="font-family: 'Century Gothic', CenturyGothic,
 Helvetica, sans-serif; font-size: 12px; line-height:
```

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```
0.8; color: #293e40; margin-top: 5px;">        <p
style="margin-bottom: 0; padding: 0; line-height: 0.8;
font-size: 10px;">          <span>2225 Lawson Lane, Santa
Clara, CA 95054, United States</span>        </p>
<p style="margin-bottom: 0; padding: 0; line-height: 0.8;
font-size: 10px; color: #293e40;">          <span>&copy; 2024
ServiceNow. All rights reserved</span>        </p>      </div>
   </div>`;
```

On completion, the project summary email template is customized with the header and footer.

Configure the Monitor project tasks agentic workflow in AI Agent Studio

Monitor project tasks agentic workflow in the AI Agent Studio.

Before you begin

To use Monitor project tasks, make sure that the email project summary skill is activated. For more information on how to activate the skill, see Configure Now Assist for Strategic Portfolio Management (SPM).

Role required: admin or it_project_manager

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Monitor project tasks**.
3. From the Monitor project tasks agentic workflow, each AI agent is shipped as active by default.

   Note:
   Only users with the Now Assist panel (NAP) role can access agents, even if the current agentic workflow doesn't require that role.

4. Enable the Monitor project tasks agentic workflow trigger:
   a. Select the Describe and connect screen and select **Continue**.
   b. From the Define trigger screen, select the existing trigger name and turn on the Active toggle on the Edit trigger window, and then select **Continue**.
   c. In the Select display screen, select **Save and test**.

   The agentic workflow trigger defines the events that invoke AI agents for this agentic workflow. The trigger ensures that the AI agents can only start working upon specific key updates to project tasks.

5. Navigate to **Workspaces** > **Project Workspace** and select the project.

   The project managers must enable the project email summary skill for a specific project and set up a cadence for the project summary email. For more information on how to set up an email cadence, see the Schedule the project summary emails with Email project summary skill.

6. To enable the AI agent for a specific project, you can directly enable the AI agent on the Email project summary modal:
   a. Navigate to **Workspaces** > **Project Workspace** and open any project.
   b. From the planning page, select the more actions icon (···) and then select **Email project summary**.
   c. From the Email project summary window, select the **Cadence** as Weekly, Bi-weekly, or Monthly according to your requirement.

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d. Select **On this day**, as days for weekly or bi-weekly or dates for monthly cadence.

e. Select **Users** and select the **Include critical path task changes**

f. Select **Schedule** or **Schedule and send** to schedule and send the email cadence for the project.

Note:
You can select **Schedule** to schedule the project summary email and the project summary is shared as per the selected cadence. You can also choose **Schedule and send** to instantly sent the summary and schedules as per select cadence. For more information, see Schedule the project summary emails with Email project summary skill.

The Monitor project tasks agents are enabled for the selected project.

Related topics

Configuring Now Assist AI agents

Install Now Assist AI agents

Using AI agent agentic workflows in Now Assist for Strategic Portfolio Management (SPM)

Strategic Portfolio Management AI agents for the monitor project tasks agentic workflow

Using AI agent agentic workflows in Now Assist for Strategic Portfolio Management (SPM)

Use the AI agents for SPM to monitor project tasks autonomously.

Available agentic workflow for AI agents for SPM

Agentic workflow name	Description	Available AI agents
Monitor project tasks	Autonomously monitor project tasks on the critical path of a project. Detect key updates, such as a delay to planned end dates, status updates to red, or state updates to incomplete or skipped. When these changes occur, the AI Agent autonomously triggers a project summary email to the project manager, highlighting the specific updates that triggered the alert.	• Project summarizer • Project eligibility analyzer

Looking for an AI agent?

- There might be AI agents installed with the Now Assist application that are not used in agentic workflows. To learn how to see all agents that are available on your instance, see Find AI agents.
- To find agents that might not be installed on your instance, visit the AI Agent Marketplace on the ServiceNow Store.

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Important:

All agentic workflows and AI agent records are read-only by default.

To run the AI agents autonomously, you must do the following steps:

- Activate the agentic workflow.
- All AI agents in a agentic workflow are active by default.

Related topics

AI Agent Studio

Configuring Now Assist AI agents

Configure the Monitor project tasks agentic workflow in AI Agent Studio

Strategic Portfolio Management AI agents for the monitor project tasks agentic workflow

Use the Monitor project tasks agentic workflow to autonomously generate a project summary email by using AI agents. AI agents help project managers to manage risks, resolve issues, or take actionable decision on the projects.

Monitor project tasks overview

The Monitor project tasks agentic workflow can help to trigger a project summary email and provide real-time visibility into key project updates. Use the email project summary skill to generate a project summary and send it as an email to the project managers.

This proactive monitoring and alert system saves time and effort for project managers, ensuring that they can respond promptly to keep project schedules on track. By leveraging these AI agents, project managers can optimize their operations, accelerate time to value, and enhance the overall project efficiency.

The email summary includes the following sections:

- Key updates on the project
- Overall project insights
- Top insights needing attention
- Milestone insights
- Resource assignment insights
- Project task insights

If you want to change this agentic workflow, you can duplicate it, adjust the settings to suit your specific needs, and activate the duplicated version of the agentic workflow instead.

Monitor project tasks agentic workflow

Autonomously generate a project summary email by using AI agents. To use Monitor project tasks, make sure that the email project summary skill is activated. For more information on how to activate the skill, see Configure Now Assist for Strategic Portfolio Management (SPM).

To access the Monitor project tasks agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Monitor project tasks**.

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To configure the Monitor project tasks agentic workflow and associated AI agents, see Configure the Monitor project tasks agentic workflow in AI Agent Studio.

AI agents used in the Monitor project tasks agentic workflow

The following AI agents are used for the Monitor project tasks agentic workflow:

- Project summarizer
- Project eligibility analyzer

Other agentic workflow

For more information on other agentic workflow that are associated with the Platform workflow, see Platform agentic workflows.

Related topics

Now Assist AI agents

Install Now Assist AI agents

AI Agent Studio

Using Now Assist for Strategic Portfolio Management (SPM)

With the Now Assist for Strategic Portfolio Management (SPM) application, you can summarize feedback, create demands, generate document summaries, and refine planning item descriptions for clarity and alignment. You can also quickly produce and share project summaries via email and use the AI agents to monitor project tasks autonomously.

Related topics

Using AI agent agentic workflows in Now Assist for Strategic Portfolio Management (SPM)

Summarize the feedback by using Now Assist for Strategic Portfolio Management (SPM)

Generate a summary from the name and description of the feedback records so that you can analyze a large volume of feedback quickly without reading each feedback record manually. You can do this task by using the multi feedback summarization skill in the Now Assist for Strategic Portfolio Management (SPM) application.

https://player.vimeo.com/video/1016235687?h=c41764ac08&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

Role required: pf_user

About this task

With the feedback or multi feedback summarization skill, you can get enough details about the feedback that you received on your product so that you can improve the product features, usability, and performance.

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** and select **Feedback**.
2. From the Feedback page, select any feedback filter card.
3. From the feedback list, select one or multiple feedback records.

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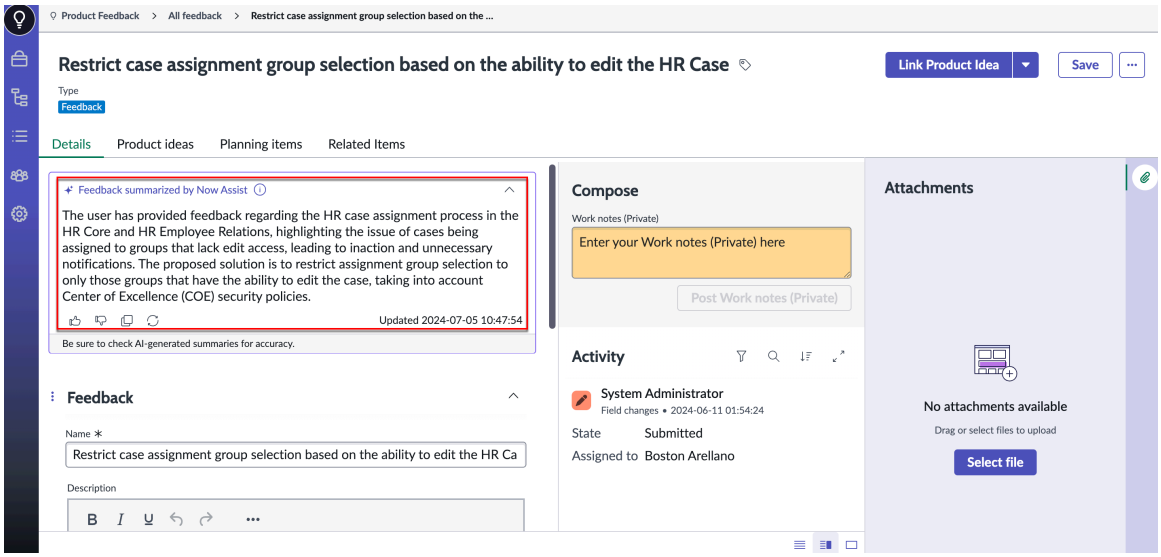
View a loader for the side panel while the summary content loads for a more engaging loading experience.

If you want to generate a summary for one feedback record, you can either generate it from the list level or at the record level. At the record level, the feedback summary is displayed in the Now Assist component. The component is collapsed by default and expands to display the summary.

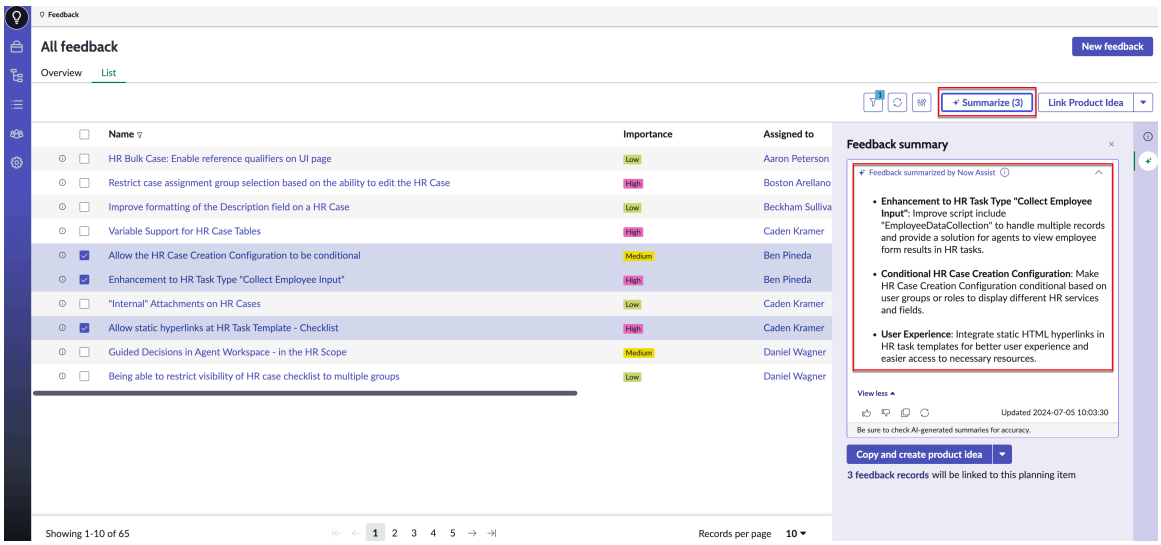
4. Select **Summarize**.

View an animation for the Now assist icon when you hover over it.

You can generate a summary of a single feedback record by using the feedback summarization skill. This image shows the AI-generated summary for a single feedback record.



You can use the multi feedback summarization skill to generate summaries of one or multiple feedback records. For example, you can analyze the high-priority feedback, filter them, summarize the records, and gain insights into the requirements.



Note:
Because the information in these fields is automatically generated, it's a good idea to review the text and make sure it's accurate.

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The feedback or multi feedback summarization skill uses the name and description information of the feedback record to generate a paragraph or bullet-point summary from the feedback.

View the hover animation for the Now Assist icon on the Summarize button in the feedback list and Docs.

5. **Optional:** When you're finished summarizing the feedback, you can expand or collapse the summary, provide feedback, copy it, or view information about it.

   Note:
   The feedback summarization or multi summarization skill checks the feedback records to determine if enough information is available to generate a summary. If there isn't enough feedback content to summarize, you can add more content and retry.

   On the side panel, you can select the preview record icon ( ) to view the additional details or select preview generated summary icon ( ) to view the summarization output.

6. **Optional:** Select **Copy and create epic** to copy the generated summary and create a planning item.

   (Optional) Save time and streamline your work flow by linking the feedback with planning items, which eliminates the need to copy summaries. You can quickly create work items in Feedback and view them in the roadmap.

Related topics

Feedback and multi feedback summarization

Create demands by using the conversational experience

Use the conversational experience of Now Assist in Virtual Agent to create a demand from any application that supports Virtual Agent.

Before you begin

Ensure that the following tasks are completed:

- Install an application that supports Virtual Agent, for example Employee Service Center.
- Enable conversational demand creation using Now Assist in Virtual Agent

Role required: none

About this task

https://player.vimeo.com/video/986004158?h=d45fb142d9&badge=0&autopause=0&player_id=0&app_id=58479

In Employee Service Center, start with a prompt to create a demand in the chat. Through a series of questions, Virtual Agent prompts you to provide information for the questions that you configured for a catalog item. Now Assist in Virtual Agent understands the context and maps the information that you provide in response to a question to an appropriate catalog item, in this case, a demand.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. Select **Open chat window**.

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3. Enter an instruction to start the conversation with Virtual Agent.

   You can start with a basic instruction such as **Create demand** or an elaborate instruction that includes the demand's information. The following examples show how each instruction is handled in the chat.

Instruction	Description
Short: **Create demand**	Virtual Agent starts a conversation to ask more information from you about the demand through a series of questions: ○ What is the name of your demand? ○ What is the reason for this demand? ○ What are the risks associated with performing this demand? The information you provide is used to fill in the fields of the Demand form. You can skip answering a question that is related to non-required fields by entering **skip**.
Elaborate: **Create a demand with the name Upgrade MyApp and business justification as upgrade and risk of not performing as milestones will be missed.**	Using the context that you provided, Virtual Agent automatically matches it to the relevant field on the Demand form. It then instructs you to enter information of only those fields that you haven't provided, such as the risk associated with performing the demand, assumption, and others. You can skip answering a question that is related to non-required fields by entering **skip**.

4. Review the information that Virtual Agent filled in for the Demand form fields.
   You can choose to make changes or submit.
5. **Optional:** Add attachments for the demand.
   The information that you provided is submitted to create a demand. Virtual Agent creates a demand and provides the information such as its number, short description, and state.

   The conversation is now complete.

Related topics

Using Now Assist in Virtual Agent

Generate stories from work items in EAP using Now Assist for SPM

Breakdown epics and features into stories using the Now Assist panel in the Enterprise Agile Planning (EAP) workspace. Based on the work item details, Now Assist generates stories.

Before you begin

Activate the Agile story generation skill for Enterprise Agile Planning. See Configure Now Assist for Strategic Portfolio Management (SPM).

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Role required: sn_apw_advanced.eap_user or sn_apw_advanced.eap_read_only, with now_assist_panel_user

About this task

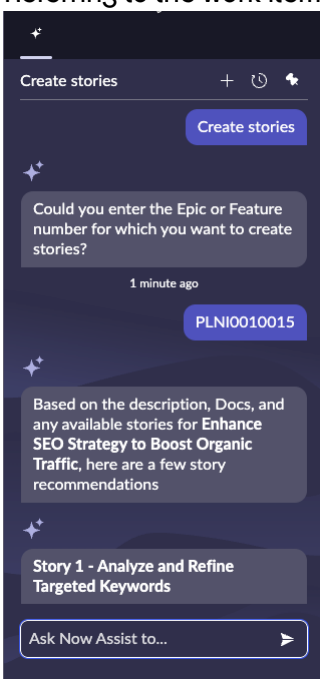
https://player.vimeo.com/video/1062571498?h=68874331c2&badge=0&autopause=0&player_id=0&app_id=58479

Procedure

1. Navigate to **Workspaces** > **Strategic Planning Workspace** > **Enterprise Agile Planning**.
2. From the Agile structure section of the navigation panel, choose your EAP team that has an epic or feature as its work item type.
3. From the Backlog or Planning board pages, select an epic or a feature for which you want to create stories.
   The work item details are displayed in the side panel.
4. **Optional:** From the side panel, select **Full details**.
5. From the instance header, select **Now Assist** to open the Now Assist panel.
6. In the Now Assist panel, select **Create stories**.

   Now Assist generates story recommendations based on the name, description, Docs content, and any existing stories for the work item.

   If you haven't performed step 4, Now Assist asks you to enter the epic or feature number. Referring to the work item number you provided, it provides story recommendations for it.



   The number of initial story recommendations that you see depend on the input data settings for this skill. You can work with your admin to modify this number. For more information, see Skill inputs for Now Assist for Strategic Portfolio Management (SPM).

7. Go through the story recommendations and choose to confirm, combine, split, remove any of the stories, or choose **Others** to suggest modifications or create more stories.

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Tip:
While Now Assist is working on the story recommendations for the current work item, you can start a new chat to create stories for another epic or feature. Select **New chat** () from the Now Assist panel header. You can switch between chats by selecting **All chats** ().

8. You can iterate on any of these actions and when you're satisfied with the recommendations, select **Confirm & Save**.
   Now Assist creates stories with the confirmed recommendations. The newly created stories are displayed in the Stories tab of the epic and feature details page.

Generate the summary for selected or complete content with Planning item doc summarization skill in Strategic Planning

Quickly learn the details of the documents from the summary that is generated by Now Assist in Strategic Planning.

Before you begin
Make sure that the Planning item doc summarization skill is active.

Role required: pf_user, pf_read, sn_align_core.apw_user, or sn_align_core.ap_read_only.

About this task
Minimize the time that you spend reading documents, meeting notes, project reports and so on by using a summary that is generated by Now Assist. You can also copy-and-paste the source materials that meet your learning needs in Docs and generate a quick summary.

Procedure

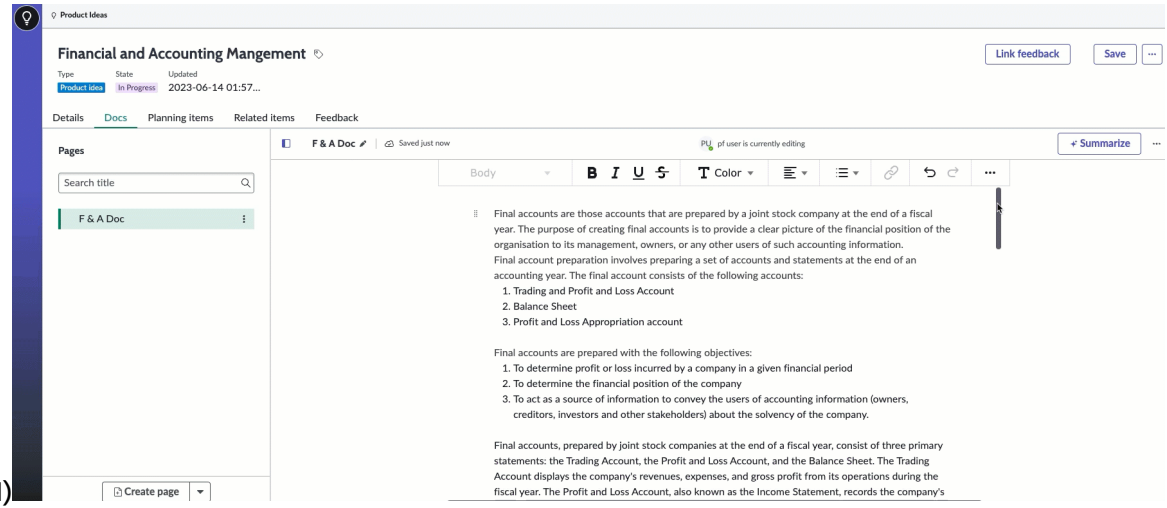
1. Navigate to **Workspaces** > **Strategic Planning Workspace** and open any planning item records such as product idea from Feedback.
2. From the **Docs** tab, perform one of these actions according to your requirements.

   Note:
   Summarization of the entire content is also permitted for users with the read role.

3. **Optional:** When you're finished summarizing the content in Docs, you can provide feedback, copy, or view information about it.

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(Optional)



Note:
Because the information in these fields is AI generated, it's a good idea to review the text and make sure it's accurate.

Only an administrator can activate the Now Assist skills. For more information, see Configure Now Assist for Strategic Portfolio Management (SPM).

The Planning item doc summarization skill checks the doc content to determine if enough information is available to generate a summary. If there isn't enough content to summarize, you can add more content and retry.

Note:
The **Summarize** button is visible only if the Planning item doc summarization skill is active. If the selected text exceeds the token limit for Now Assist, the Planning item doc summarization skill can't be executed. If there is more content to summarize, you can remove some content and retry.

Generate the summary for selected or complete content with Project doc summarization skill in Project Workspace

Quickly learn the details of the documents from the summary that is generated by in Project Workspace.

https://player.vimeo.com/video/1038147968?h=9451c75819&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin
Make sure that the Project doc summarization is active.

Role required: it_project_user

Procedure

1. Navigate to **Workspaces** > **Project Workspace** and open the required project.
2. From the Docs, perform one of these action according to your requirements.

Note:
Summarization of the entire content is also permitted for users with the read role.

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3. **Optional:** When you're finished summarizing the page in Docs, you can provide feedback, copy, or view information about it.

   Note:
   Because the information in these fields is AI generated, it's a good idea to review the text and make sure it's accurate.

   Only an administrator can activate the Now Assist skills. For more information, see Configure Now Assist for Strategic Portfolio Management (SPM).

   The Project doc summarization skill checks the doc content to determine if enough information is available to generate a summary. If there isn't enough content to summarize, you can add more content and retry.

   Note:
   The **Summarize** button is visible only if the Project doc summarization skill is active. If the selected text exceeds the token limit for Now Assist, the Project doc summarization skill can't be executed. If there is more content to summarize, you can remove some content and retry.

Schedule the project summary emails with Email project summary skill

Schedule the project summary emails to prioritize and track the most important changes in the project in Project Workspace.

https://player.vimeo.com/video/1039117096?badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

Make sure that the Email project summary skill is active.

Role required: it_project_manager

About this task

By using the Email project summary skill, you can generate a concise project summary. The project summary is shared through email. Project managers can monitor key elements such as milestones, resource assignments, projects, and project tasks. They can also prioritize their projects and decide the cadence of receiving these project summary emails.

Procedure

1. Navigate to **Workspaces** > **Project Workspace** and open any project.
2. From the planning page, select the more actions icon (···) and then select **Email project summary**.
3. From the Email project summary modal, select the **Cadence** as Weekly, Bi-weekly, or Monthly according to your requirement.
4. Select **On this day**, as days for weekly or bi-weekly or dates for monthly cadence.

   Note:
   The email ID of the project manager is required before you can send the summary over the email.

   You can disable email summary by selecting **Disable email summary** check box.

5. Select **Users** from the list.

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- The project manager is automatically set as the default email recipient for the project.
- You can select one or multiple users. Only users with sn_ppm_read role or have read or view access to project information appear for selection in the users list.
- When an email is sent to recipients, the project manager is placed in the To list, while all other recipients are included in the Cc list.
- For confidential projects, recipients are required to be included in the list of users authorized to view the project.

Related topics

Email project summary

Refine planning items content using write planning item skill

Improve record quality by enabling AI-assisted text refinement in the description fields of Product Idea, Demand, Epic, Project, Capability, Feature, and Story forms in Strategic Planning Workspace. Enable product managers and agile users to refine planning item content efficiently using the Elaborate and Shorten options and create planning items with sufficient information.

Before you begin

Make sure that the Write planning item skill is active.

Role required: sn_align_core.apw_user

About this task

Reduce the time spent manually on improving descriptions for Strategic Planning work items such as Product idea, Demand, Epic, Project, Capability, Feature and Story. Within the description field of these work items, use the refine with now assist menu to shorten or elaborate the text.

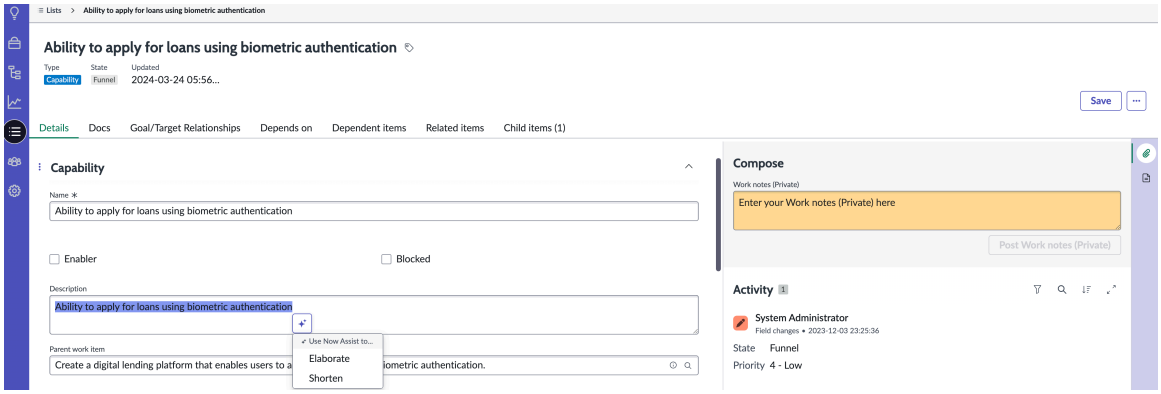
The write planning item skill helps in improving clarity and completeness of your work item and reduces the rework due to missing or unclear planning item information.

The skill provides content recommendations using the description fields of the planning items. When refining content for a story, the write planning item skill takes into account the description and acceptance criteria fields.

Procedure

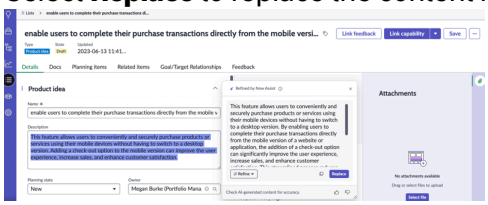
1. Navigate to **Workspaces** > **Strategic Planning Workspace**.
2. Open any planning item such as product idea, demand, epic, project, capability, feature, or story.
3. From the description field, select the **Refine with Now assist** menu and then select **Shorten** or **Elaborate** based on your requirement.

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From the description field, you can directly access the **Refine with Now Assist** menu by single-clicking the field.

4. Select **Replace** to replace the content in the description field.



5. **Optional:** From the Refined by Now Assist window, select **Refine** and then select **Shorten** or **Elaborate** to improve the generated text.
6. When you're finished summarizing the content in planning items, you can replace the existing content with generated content or provide feedback, copy, or view information about it.

Related topics

- Exploring Now Assist for Strategic Portfolio Management (SPM)
- Configure Now Assist for Strategic Portfolio Management (SPM)
- Skill inputs for Now Assist for Strategic Portfolio Management (SPM)

Now Assist for SPM reference

Reference information to provide additional information about tables, roles, and properties installed with Now Assist for SPM.

Related topics

- Exploring Now Assist for Strategic Portfolio Management (SPM)
- Configure Now Assist for Strategic Portfolio Management (SPM)
- Using AI agent agentic workflows in Now Assist for Strategic Portfolio Management (SPM)
- Using Now Assist for Strategic Portfolio Management (SPM)

Additional information on Email project summary skill

View the additional information about email project summary skill such as column restrictions, date criteria, and so on.

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Column restrictions

The columns that are considered for generating the project summary for each table are listed in the following table.

Column restrictions for tables

Tables	Columns
Project	• State • Short description • Status • Planned start date • Planned end date • Project level EAC (Estimate at Completion) • Project budget • Percent complete
Milestone	• Short description • State • Status • Planned start date • Planned end date • Milestone • Key milestone
Project task	• Short description • State • Status • Planned start date • Planned end date
Resource assignment	• Resource • Start date • End date • Resource status • Group • Role • Skill

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Date selection criteria

- The planned start or end date of the milestone should fall within the same month as the snapshot.
- The planned start date or end date of the resource assignment should fall within the same month as the snapshot.
- The planned start date or end date of the project task should fall within the same month as the snapshot.

Email cadence criteria for scheduling an email

- Emails are scheduled to be sent at regular intervals.
- Emails are sent consistently until the process is paused.
- Once unpaused, the cadence resumes, with the next email sent at the next scheduled interval.
- A new snapshot is created at the time of cadence change or when it's unpaused.

Collaborative Work Management

ServiceNow® Collaborative Work Management (CWM) provides a central hub to plan, visualize, manage, and collaborate on work with your teams. Save time and improve the efficiency of your team by avoiding switching between multiple tools to manage the progress of work and goals.

https://player.vimeo.com/video/1053272151?h=a540ca0fa9&badge=0&autopause=0&player_id=0&app_id=58479

CWM enables planning tasks in detail, organizing unplanned work and its resources, and collaborating with cross-functional teams.

Get started

Explore	Configure
	
Learn the key features and business value of CWM	Set up CWM

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Use	Reference
	
Start collaborating on work with CWM	Learn about roles, tables, and system properties of CWM.

Troubleshoot and get help

- Ask or answer questions in the Strategic Portfolio Management forum on the ServiceNow Community.
- Search the Known Error Portal for known error articles.
- Contact Customer Service and Support.

Exploring Collaborative Work Management

Learn more about Collaborative Work Management (CWM) and review the benefits it can provide for your team.

Collaborative Work Management overview

CWM is an industry agnostic work management tool that enables organizing and managing the tasks assigned to you and your team using collaborative Spaces. Work can be managed and value can be tracked from a single location without switching between different applications.

With CWM, you can:

- Collaborate in real time using shared Spaces.
- Enable flexible ways of working for your team using customizable Boards.
- Choose to execute planned work in Agile methodology using Sprint planning or in a custom methdology.
- Organize and manage any type of work such as personal work tasks, team tasks, or lists of other items from a central workspace.
- Manage all required documentation directly within a Space by creating rich-text docs that enable real-time collaboration.
- Connect to Strategic Planning workspace where Boards can be prioritized and roadmapped in a portfolio plan.
- Understand the value that your team's work is delivering by connecting all work on a Board to a business goal.
- Reference any work from the ServiceNow AI Platform such as Incidents, Risks, and Issues.

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Collaborative Work Management benefits

Benefit	Feature
Create Spaces and share with others on your team to organize and manage the team's work. Within a Space, you can create unlimited Boards to manage tasks and Docs to manage documentation for those tasks. Use **My Space** as a personal space to manage any work assigned to you.	Spaces
Configure a flexible workspace without the involvement of an admin user. Define your own workflow and organize work the way you want. • Create custom fields for task records. • Switch between List, Gantt, and Kanban views. • Create custom work item types. • Add a list of additional assignees to a task.	Boards
Boost efficiency and save time by automating processes such as sending notifications, reassigning tasks, or updating task priority when certain conditions are met.	Automations
Manage different types of documentation such as meeting notes, technical specifications, or feature requirements from a single location and avoid using multiple disconnected tools. • Create rich text docs and add action items to users from within and outside the team. • Collaborate on docs in real-time with multiple concurrent editors.	Docs
Save your preferred data views for a Board or create shared views to ensure a consistent experience across sessions and for the entire team.	Board views
Save time, reduce inconsistencies in format, and avoid creating repeatable Boards and Docs using predefined and templates.	Templates for Boards and Docs
Plan, track, and manage Stories and other work items for your teams in the Agile methodology using Sprint planning in CWM Boards.	Sprint planning in CWM
Enable a centralized view to plan and manage all work by connecting work items from across multiple ServiceNow AI Platform applications to a single CWM Board.	Connected work in CWM

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Benefit	Feature
Use tasks data offline to obtain insights, share with stakeholders, and prepare for analysis or presentations by exporting Boards to CSV or Microsoft Excel files.	Export Board as CSV or Excel
Use the Docs offline, and share with teams or stakeholders outside CWM by exporting Docs as PDF.	Export Doc as PDF
Prioritize and roadmap Boards in Strategic Planning workspace's portfolio plans. The Organization, Project Portfolio, and Strategic Investments lenses support CWM Board as a planning item.	Connecting CWM with Strategic Planning or Portfolio Planning
Add a reference to other ServiceNow AI Platform records such as Incidents, Risks, or Issues in CWM Docs.	Integration with other ServiceNow AI Platform records.

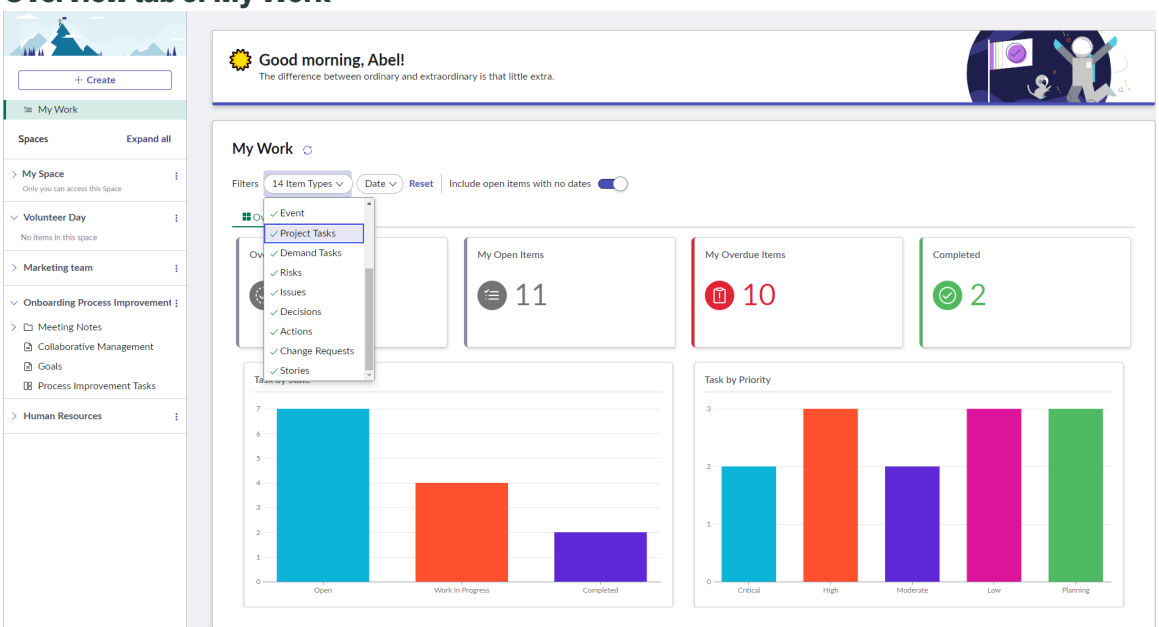
My Work in CWM

Manage all your work such as CWM tasks, project tasks, RIDAC items, and Agile stories from a centralized view in the Collaborative Work Management workspace.

My Work in CWM consolidates all your tasks across CWM and Strategic Portfolio Management (SPM) workspaces, provides visualizations around work such as task grouping by state, priority, and key metrics such as open and overdue items.

Tasks in My Work include all work items for which you are added to the **Assigned to** or **Additional assignee** fields.

Overview tab of My Work



My Work page has two views, Overview and List.

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- Overview tab shows multiple widgets that provide information related to the progress of your work. It also enables you to apply filters on the type of tasks that you want to view.
- List tab shows all open work items assigned to you in a list or grid format, where you can apply the group by and filter options on the columns.

  List view also provides a link back to the source of the work item. For example, if your work item is a Risk, the Source column in the List view provides a navigation to the RIDAC page of the Project Workspace application.

Overview tab of the My Work page in CWM

Widget or option	Description
Overall Progress	Percentage of work that is completed
My Open Items	Number of work items that are pending. Clicking the number opens a list view of all work items assigned to you and are in the **Pending** state.
My Overdue Items	Number of work items that are overdue. Clicking the number opens a list view of all work items assigned to you that are past their due date.
Completed	Number of work items that are complete. Clicking the number opens a list view of all work items assigned to you that are in the **Closed Complete** state.
Task by State	Bar chart that groups all work items assigned to you by their current state. Clicking a bar opens a list of tasks that meet the filter criteria for the corresponding bar. For more information on how the tasks are grouped by state, see Grouping of tasks in status reports of CWM My Work.
Task by Priority	Bar chart that groups all work items assigned to you by their priority. Clicking a bar opens a list of tasks that meet the filter criteria for the corresponding bar. For more information on how the tasks are grouped by priority, see Grouping of tasks in status reports of CWM My Work.
Filters	Choose the type of work items that you want to view in My Work. Based on the SPM applications that are installed in your ServiceNow instance, the following types are available to choose from:

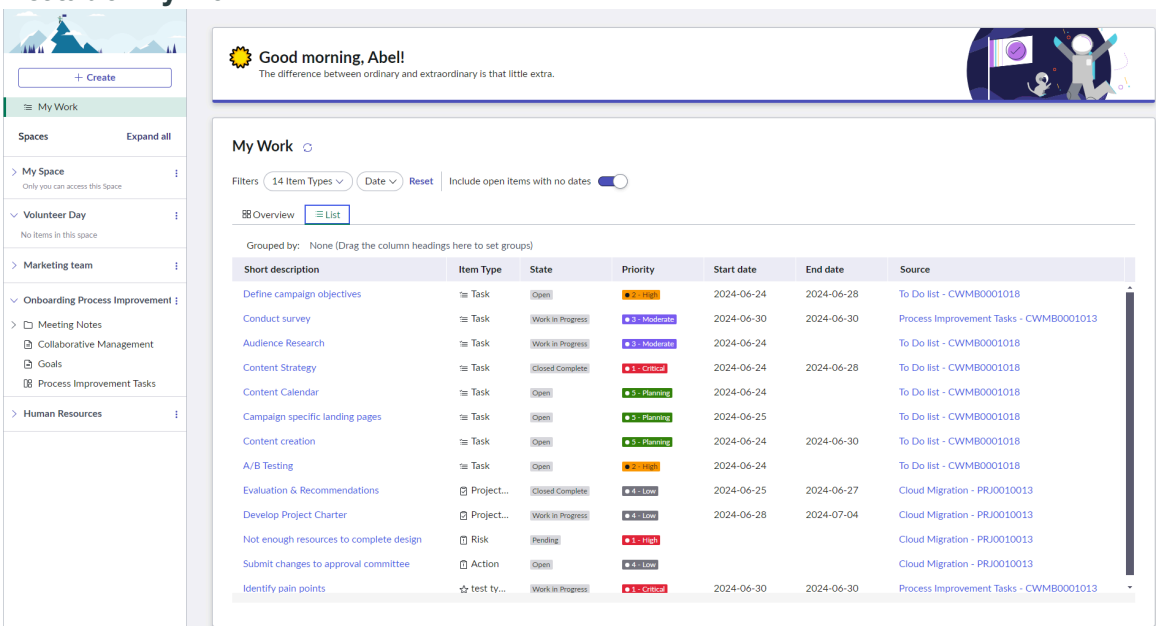
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Overview tab of the My Work page in CWM (continued)

Widget or option	Description
	• CWM Tasks • Project Tasks • Demand Tasks • Risks • Issues • Decisions • Actions • Change Requests • Stories • Scrum tasks
Date	Filter the tasks by their start and end dates.
Include open items with no dates	Enable display of work items that have no start date, end date, or both.

- CWM tasks or Project tasks that have the **Additional assignee** field set to your name are also shown.
- Project tasks that are assigned to you from the **Assigned to** or **Resource Assignees** fields are shown.

List tab of My Work



The List view shows all open work items assigned to you. Click the **Short description** of a work item to view its details in a modal pop up. Click the **Source** of a work item to open the work item in a new tab.

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Note:
Connected work items are not shown in the My Work page, unless those items are story, poject task, demand task, or any RIDAC records.

Configuring Collaborative Work Management

Plan and configure how your team can implement Collaborative Work Management.

Configuration overview

Use the following steps as guidelines to set up Collaborative Work Management. Steps 3–5 are optional and provide additional configuration options to make your CWM experience more connected with the ServiceNow AI Platform.

1. Install Collaborative Work Management.
2. Assign CWM roles to the relevant users. See Components installed with Collaborative Work Management.
3. Configure Strategic Planning to include CWM Boards for Prioritization, Roadmap, and Goals. See Connecting CWM with Strategic Planning or Portfolio Planning.
4. Add other ServiceNow AI Platform tables that can be referenced in the Docs.

   See Enable ServiceNow AI Platform records in CWM Docs.
5. Enable the **Request access** button for non-CWM users to request access to the CWM workspace.

   See Properties installed with Collaborative Work Management.

Install Collaborative Work Management

You can install the Collaborative Work Management (CWM) application (sn_cwm) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Collaborative Work Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Collaborative Work Management:

- Roles
- Tables
- System properties

For more information, see Components installed with Collaborative Work Management and Properties installed with Collaborative Work Management.

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Collaborative Work Management application (sn_cwm) using the filter criteria and search bar.

   You can search for the application by its name or ID (sn_cwm). If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Connecting CWM with Strategic Planning or Portfolio Planning

Configure Strategic Planning or Portfolio Planning to include CWM Boards so that you can plan, roadmap, and associate goals to Boards in a portfolio plan.

By adding CWM Boards to a lens configuration, you can access them in the Prioritization, Roadmap, and Goals pages of a portfolio plan as planning items.

Note:
This functionality requires installing the Strategic Planning or Portfolio Planning application from ServiceNow Store.

To successfully enable planning with CWM Boards in Strategic Planning or Portfolio Planning, complete the following tasks.

Add CWM Boards to lens configuration

For the lens that you want to use to build portfolio plans, update the configuration to include CWM Board as a planning item in Strategic Planning or Portfolio Planning.

Before you begin
Role required: admin

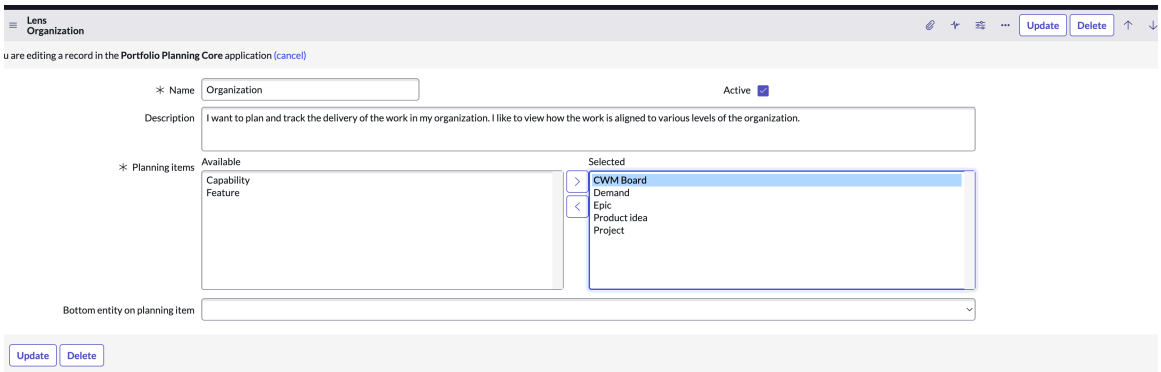
Ensure that the Application scope of your instance is set to **Portfolio Planning Core**.

About this task
All default lenses support CWM Board as a planning item. For example, if you are building portfolio plans using Organization lens, then you can add CWM Board as a planning item in the Organization lens configuration.

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Procedure

1. Navigate to **All** > **Strategic Planning** > **Lenses**.
2. Select a lens.
3. From the Available list of planning items, move **CWM Board** to the Selected list.



Note:
If you don't see CWM Board in the Available list, update the system property *sn_align_core.planning_item_types_allow_list* to allow it.

4. Select**Update**.

What to do next
Configure CWM Board form layout.

Configure CWM Board form layout

Add the lens entity field to the CWM Board form so users can link Boards and have them appear in the right portfolio plan in Strategic Planning or Portfolio Planning workspaces.

Before you begin
Role required: admin

Ensure that the Application scope of your instance is set to **Collaborative Work Management**.

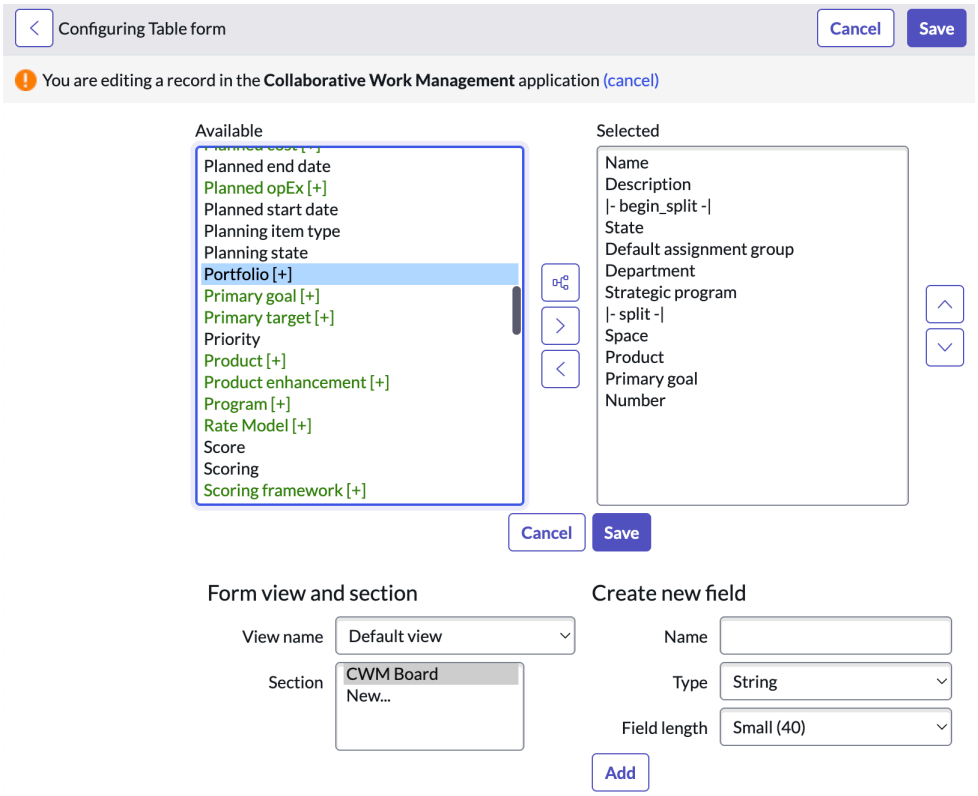
About this task
Include the field for your lens entity in the CWM Board form. This allows CWM users to link their Boards to the lens entity so that the Boards appear in the corresponding portfolio plan. For example, using the project Portfolio lens, you could create a portfolio plan for the Technology portfolio. When CWM users associate their Boards with the Technology portfolio, those Boards will automatically show up in the Technology portfolio's portfolio plan.

Similarly, you can associate Boards to goals or portfolios. To ensure that your CWM users can perform this association, configure the Board form to include these fields.

Procedure

1. Navigate to **System Definition** > **Tables**.
2. From the list of tables, search for and select **sn_cwm_board**.
3. From the Related Links section, select **Layout Form**.
4. From the list of fields in the Available section, move your desired field to the Selected section. For example, move the **Portfolio** field to the Selected section.

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5. Repeat this step for other fields that you want to add to the CWM Board form.
6. Select **Save**.

Result

The CWM Board form now shows the new fields added to its layout.

Your CWM users can add details of their departments, portfolios, or primary goals depending on the portfolio plans they want these Boards to show up in.

What to do next

Associate Boards with portfolio plan entities.

Associate Boards with portfolio plan entities

Link CWM Boards to a lens entity so that these Boards appear in the corresponding portfolio plans in Strategic Planning or Portfolio Planning workspaces.

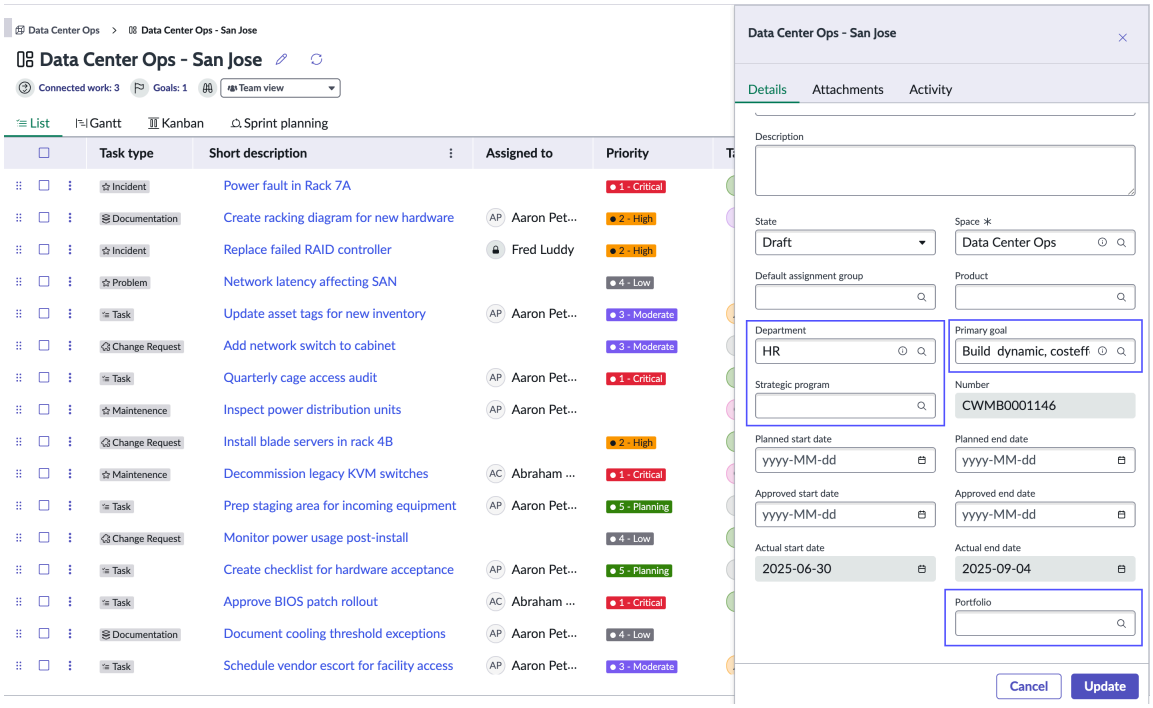
Before you begin

Role required: sn_cwm.cwm_user

Procedure

1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From a Space, select a Board.
3. From the Board header, select the Edit icon ( ).
4. In the Board form, select a department, primary goal, strategic program, or portfolio to associate with this Board.

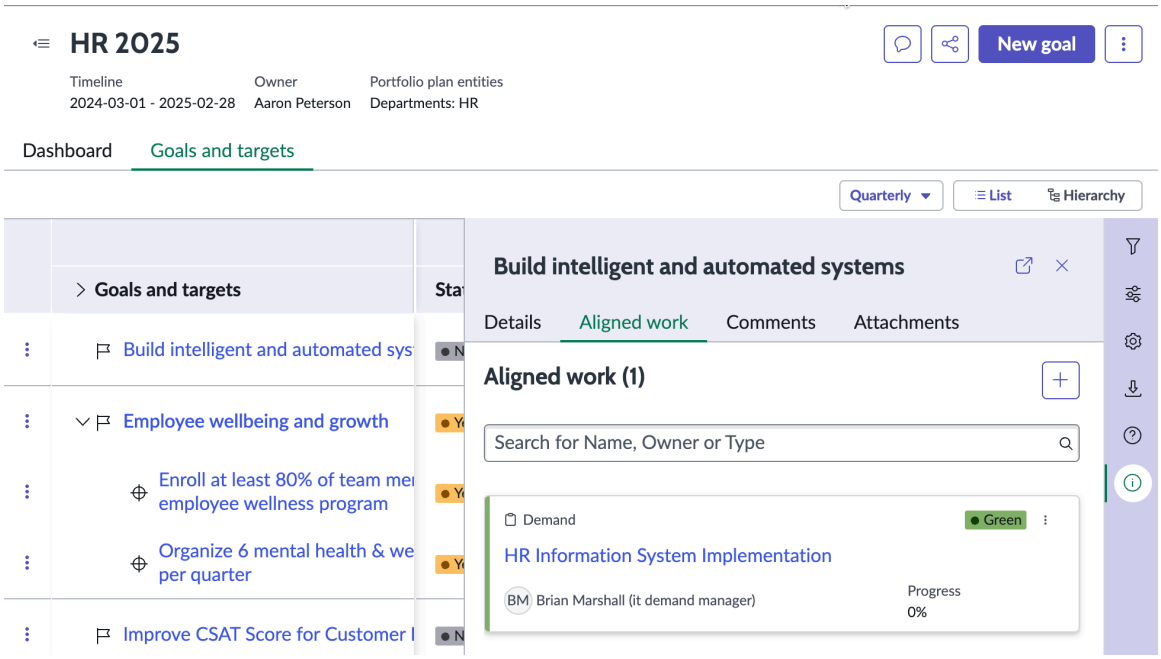
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5. Select **Update**.

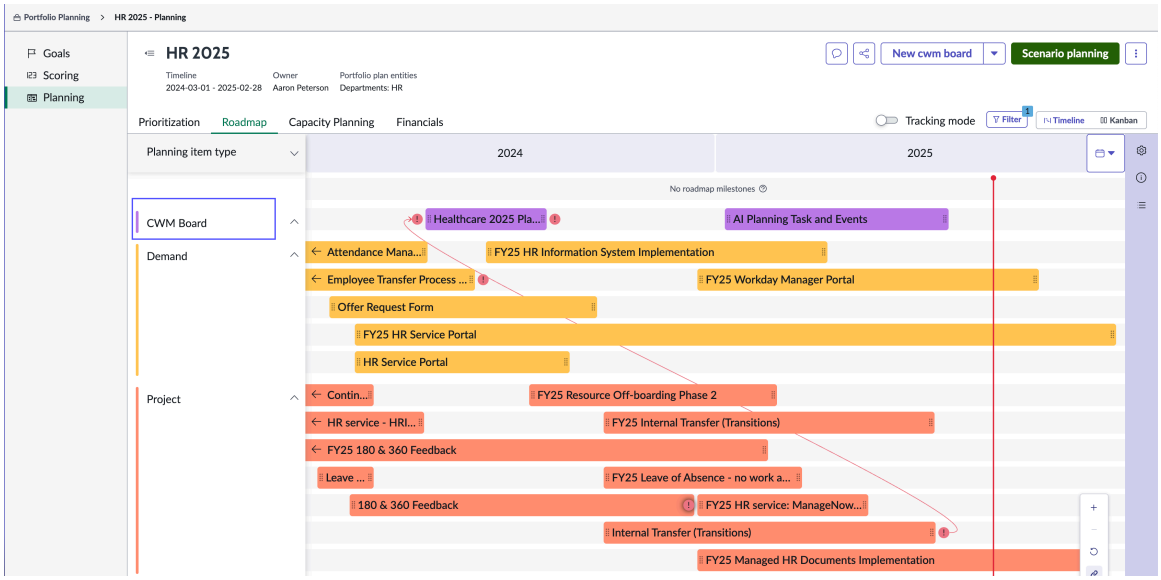
Result

- If a primary goal is added, this Board will show up in the aligned work for the selected goal in Strategic Planning workspace.



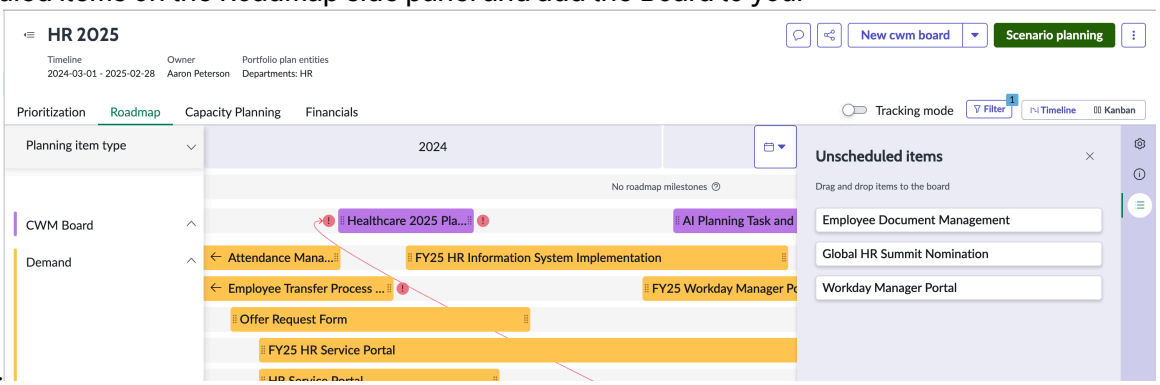
- If you add a department, and the Board's dates align with that department's portfolio plan, the Board will automatically appear as a planning item on the roadmap.

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- If a portfolio is added, and the Board's dates align with the portfolio plan, the Board will appear as a planning item in that portfolio plan's roadmap.

  If there are no dates added to your CWM Board, you can check for Unscheduled items on the Roadmap side panel and add the Board to your roadmap.



Enable ServiceNow AI Platform records in CWM Docs

Facilitate connecting work across ServiceNow AI Platform by enabling CWM users to add a reference to records of any ServiceNow table in CWM Docs.

Before you begin

Verify that **Application Scope** of your instance is set to **Collaborative Work Management**.

Role required: admin

About this task

By default, the *sn_cwm.record_mention_config* property is configured to include only CWM task records. To include any other ServiceNow AI Platform record, update the **Value** field of this property.

Watch this video for information about enabling ServiceNow AI Platform records.

Video explaining how to enable Now platform records in CWM. Approximately one minute and 4 seconds long.

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Procedure

1. Navigate to **sys_properties.list**.
2. From the Name column, search for and open the **sn_cwm.record_mention_config** property.
3. Update the **Value** field of the property.
   Include the table name, its label, and the fields that you want displayed for its record in a CWM Doc. For example, you want to include Incident table details. The updated contents of the **Value** field would be:

```
[{"sourceTable":"sn_cwm_task","label":"CWM
 Task","fields":["short_description","number"]},
{"sourceTable":"incident","label":"Incident","fields":["short_d
escription","number"]}]
```

4. Repeat step 3 to include other ServiceNow tables.
5. Select **Update** to save your changes to the property.

Result

Tables included in the property can now be referenced in CWM Docs of any space.

Using Collaborative Work Management

Use the different features of Collaborative Work Management (CWM) to collaborative with teams across your organizations and manage work in the way your teams want.

Collaborating with Spaces in CWM

Create collaborative Spaces for teams to work together on projects, goals, or assignments.

CWM provides two kinds of Spaces: A personal Space that can be accessed only by you and shared Spaces to collaborate with other users in your organization.

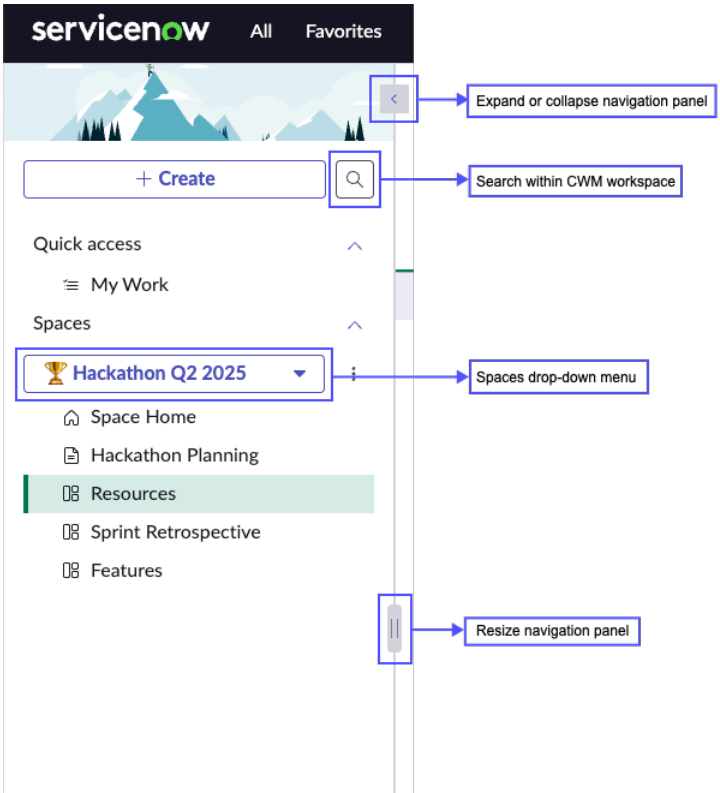
Navigation within the CWM workspace

Navigation panel

The CWM navigation panel provides a simpler and cleaner user interface. At a given time, the navigation panel shows the contents of just one Space to provide a distraction-free experience while you work.

Use the Spaces menu to choose a different Space. Additionally, you can also choose to resize the navigation panel or collapse it altogether to increase the working area for your Boards or Docs.

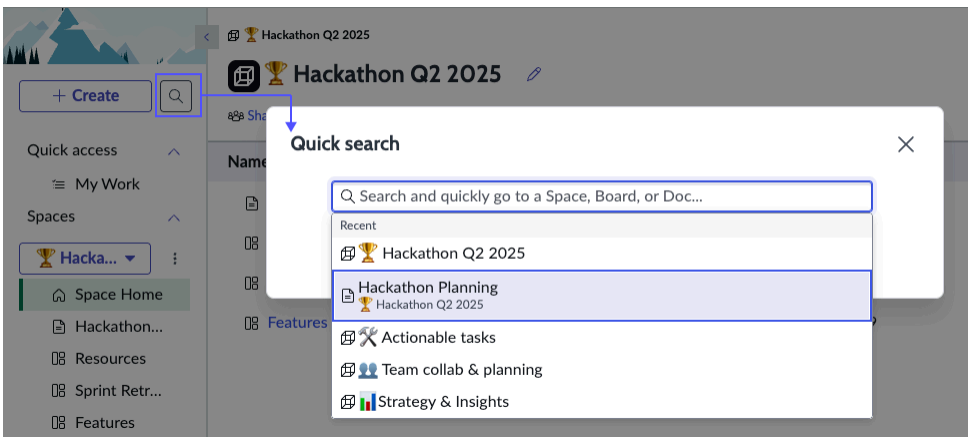
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Search

Use the Search option to quickly find and open any Space, Board or Doc.

Also, the Search bar displays all the recent Spaces, Boards, and Docs that you've navigated to within the CWM workspace so that you can quickly select from the recent items without having to search for them again.



Keyboard shortcuts

Use the following keyboard shortcuts to quickly perform actions within the workspace.

Keyboard shortcuts for CWM

Action	macOS shortcut	Windows OS shortcut
Search for a Space, Board, or Doc	Option + F	Alt + F

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Keyboard shortcuts for CWM (continued)

Action	macOS shortcut	Windows OS shortcut
Create Space	Option + S	Alt + S
Create Board	Option + B	Alt + B
Create Doc	Option + D	Alt + D
Navigate to My Work	Option + M	Alt + M

My Space

By default, a Space and a sample Board are created for you so that you can get familiar with the features and options in the workspace. From your personal Space, you can browse through the **Intro to Docs** and **Welcome to CWM** documents for a high-level overview of what you can do with CWM.

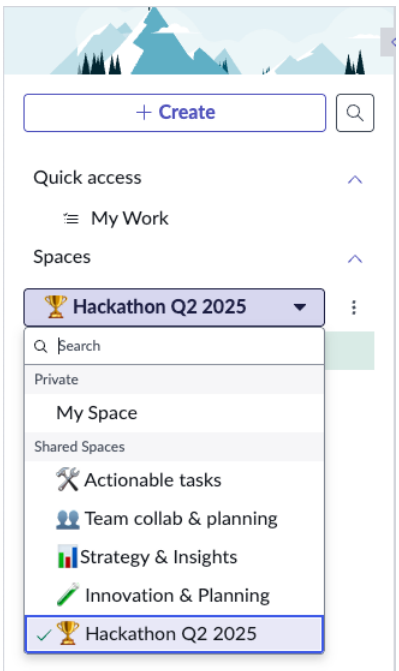
Create more task Boards, docs, and organize them into folders to manage the work assigned to you.

Shared Spaces

Collaborating with Spaces

Shared spaces act as a central location for cross-functional teams to come together and collaborate toward common goals. Plan for the next big release, prepare for a presentation, organize a conference, and do much more using task Boards and collaborative Docs.

With the capability to connect to any record across the ServiceNow AI Platform, avoid the risk of having information scattered across multiple apps and missing unplanned tasks.

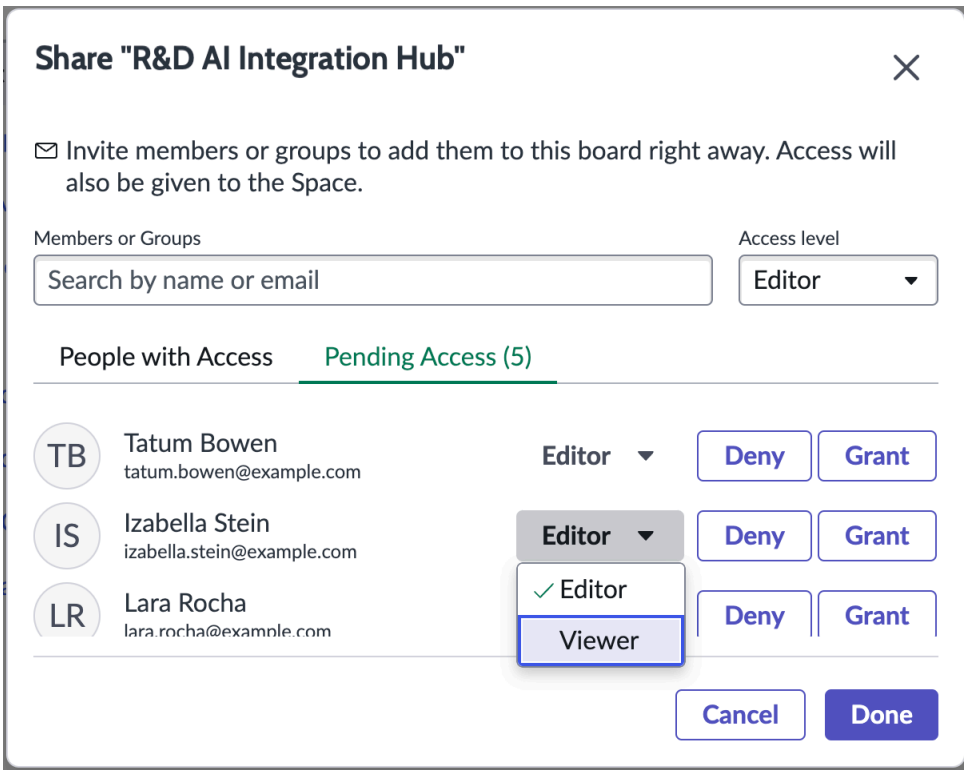


Managing access in the Share permissions modal

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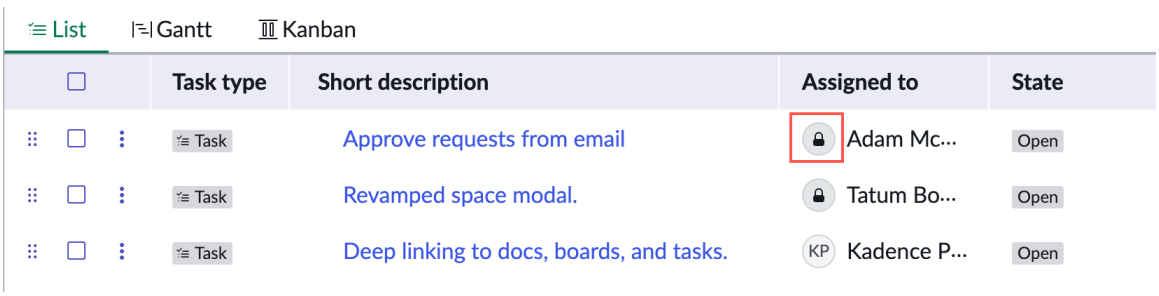
As a Space owner or editor, you can manage access for existing users of your Space and review access requests from other users using the Share permissions modal.

- People with Access section: Manage the access level of existing collaborators to Editor, Viewer, or Owner, or remove them from the Space.
- Pending Access section: Review requests from users and choose to grant or deny them access to your Space.



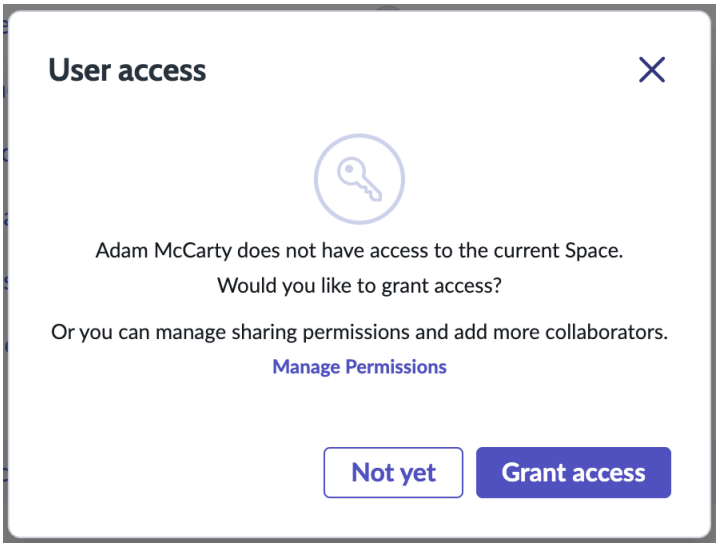
Managing Space permissions for task assignees and other users

As a Space owner or editor, while assigning tasks to your team members, you can identify users who don't have access to the workspace through a lock icon next to the user name. This icon is visible in the List view of the Board in the columns of type People such as **Assigned to**, **Additional Assignee**, and **Assignment group**.



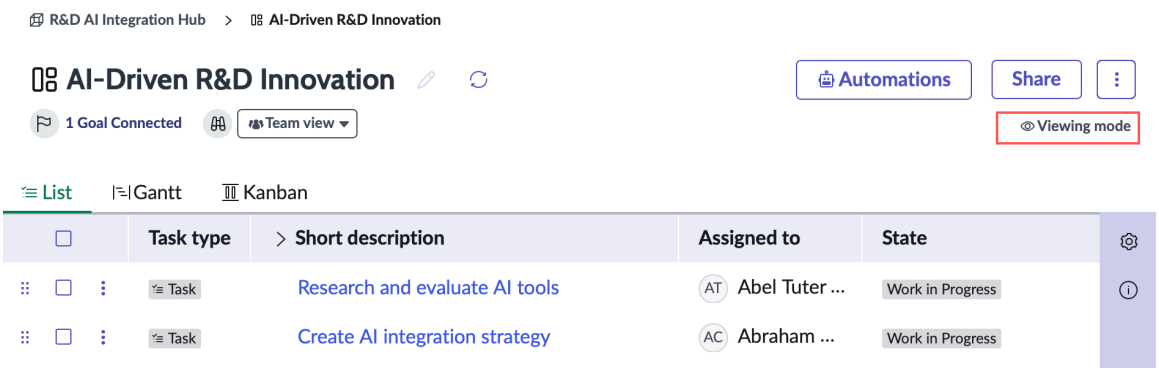
You can either use the workspace prompt to grant assignees Viewer access or choose to manage their access level later from the Share permissions modal. For more information on managing sharing permissions, see Share a Space in CWM and manage sharing permissions.

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Requesting to elevate user access role to Editor

The Viewing mode indicator in the Board header indicates that you have only the Viewer role to the Space that you're in. As a Space viewer, you can send a request to Space owners and editors to request elevating your role to Editor by selecting the indicator.



Space owners and editors receive an email request from which they can choose to grant or deny access to the user.

Using the following sections, get started with shared Spaces in the workspace.

Create a Space in CWM

Create Spaces in Collaborative Work Management to enable cross-functional teams to come together and manage work tasks and documentation.

Before you begin

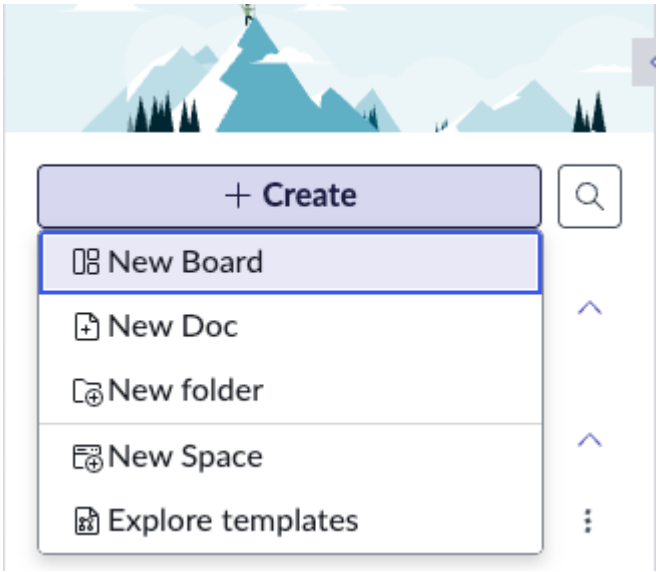
Install Collaborative Work Management.

Role required: sn_cwm.cwm_user

Procedure

1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From the left side panel, select **+ Create** > **New Space**.

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3. In the **Space name** field, enter a name for the Space.



4. Select **Create**.

Result

A new Space is created and added right below the **My Space** section. You can add as many Spaces as you need for each of your projects, teams, or other assignments.

What to do next

- Create a Board to organize and manage work for your team or projects. See Create a Board in CWM.
- Share the Space with others on your team. See Share a Space in CWM and manage sharing permissions.

Share a Space in CWM and manage sharing permissions

Invite cross-team members to Collaborative Work Management Spaces to collaborate on tasks or projects. You can also manage permissions for users with existing access to your Space.

Before you begin

Create a Space in CWM.

Role required: sn_cwm.cwm_user

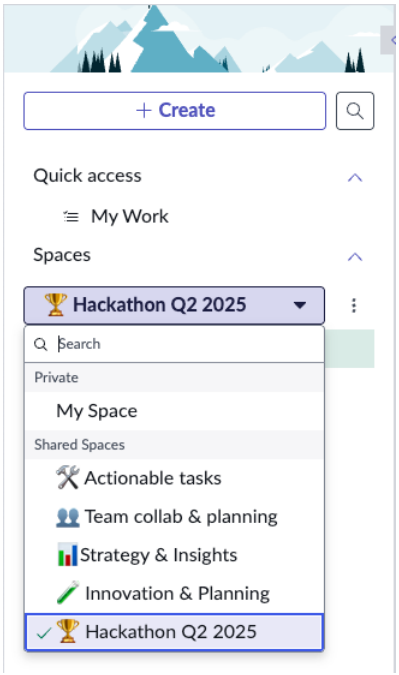
About this task

Sharing a Space with a user results in them gaining access to all Boards, Docs, and folders within that Space. Use the Share permissions modal from the Space or Board header to manage sharing permissions and access levels to your Space for your team.

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Procedure

1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From the left side panel, select a Space.

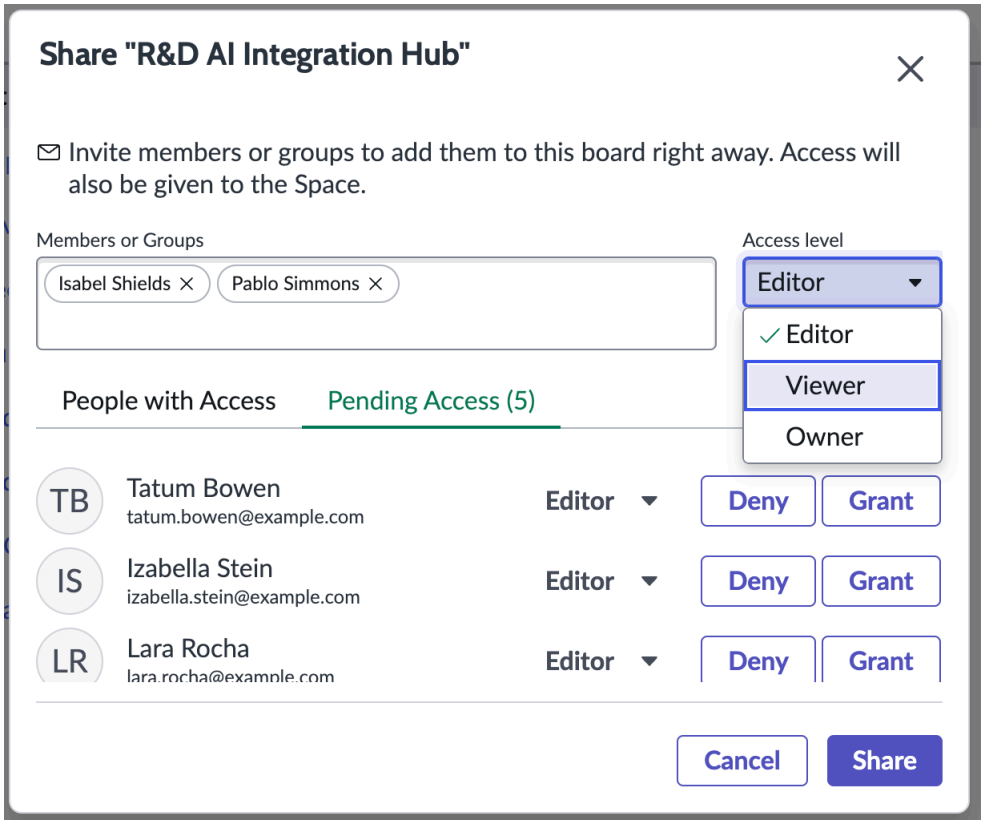


3. From the header of the Space, select **Share**.
   My Space is personal to you cannot be shared.
4. Add new users to the Space.

   a. In the **Members or Groups** field, enter the names of individual users or groups.

      You can search for users and groups by email along with their name so that you choose the right collaborator.

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b. From the **Access level** field, set the access required for these users.

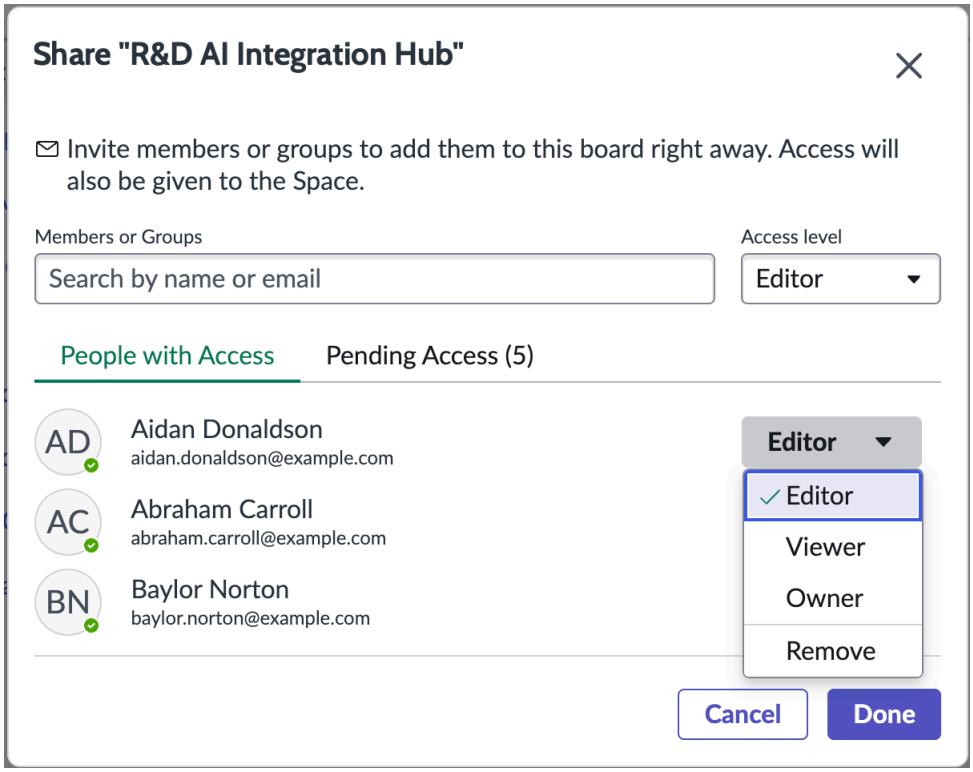
Type of access levels for a CWM Space

Access level	Description
Owner	This role is typically assigned to the creator of the space. They have the create, read, update, and delete access to Boards, Tasks, Columns, and Docs in the Space.
Editor	They have the create, read, update, and delete access to tasks in the Board and Docs in the Space. They can share the Board but can't delete it.
Viewer	They can view the data in the Space but can't update or delete it.

c. Select **Share**.

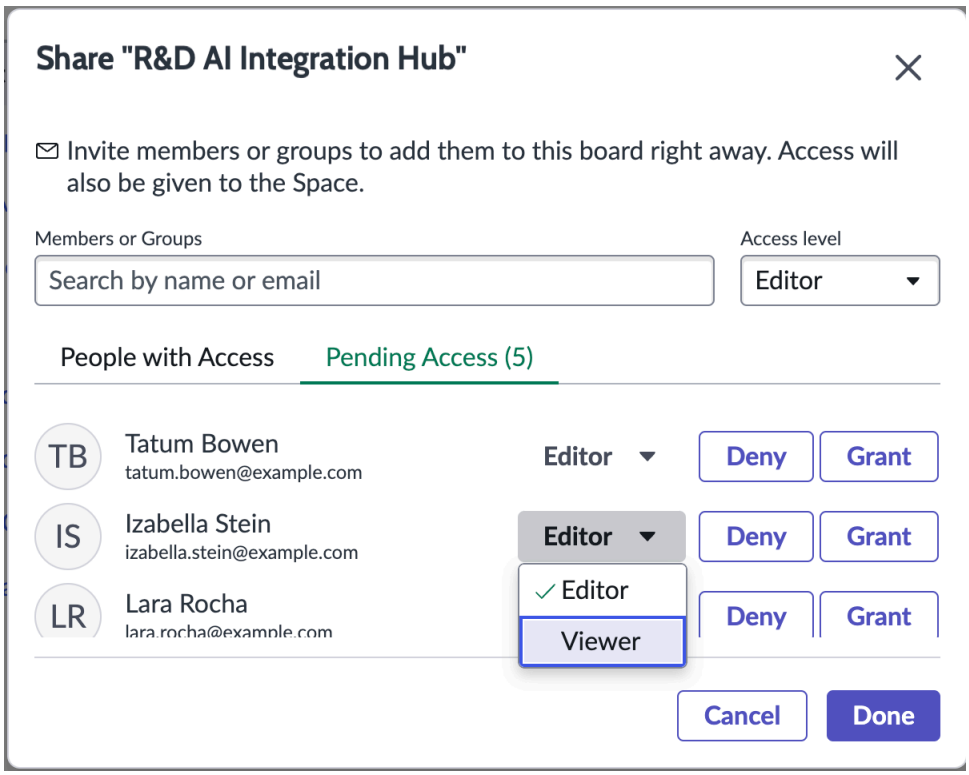
5. From the **People with Access** tab, manage permissions for existing users by changing their access level or removing a user from the Space.
As the Owner or Editor of a Space, you can remove access for existing users of the Space or yourself at anytime. As a viewer, you can only remove access for yourself.

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6. From the **Pending Access** tab, you can review the list of users who have requested access to your Space and choose to grant or deny them the access.

   Before granting access to a user, you can modify their access level to Editor or View as necessary.



Result
An email invite is sent to the users that you shared this Space with.

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What to do next
Start working on tasks for your team using Boards. See Managing work using Boards in CWM.

Create a folder in CWM

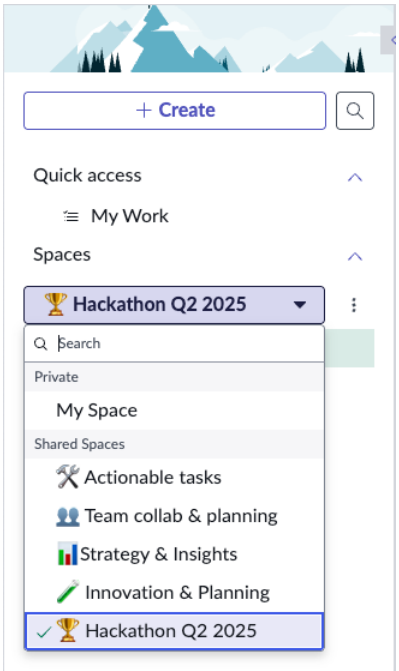
Organize Boards and Docs of a Space into folders in Collaborative Work Management Workspace.

Before you begin
Create a Space in CWM.

Role required: sn_cwm.cwm_user

Procedure

1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. Open a Space that you want to create a folder in.



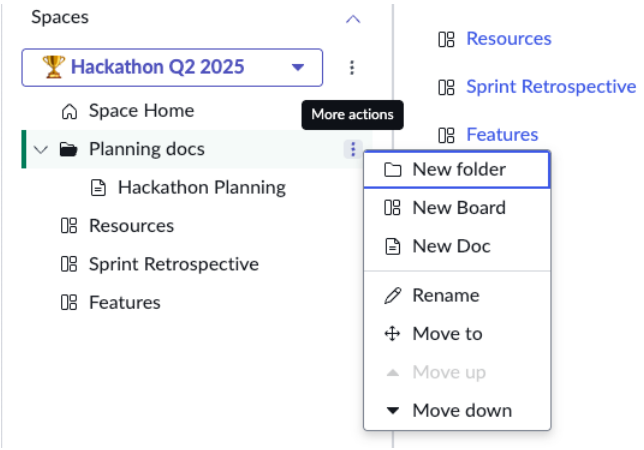
3. From the More options menu of the Space ( ), select **New folder**.
4. In the **Folder name** field, enter a name for the folder.
5. Select **Create**.

Result
A new folder is created in the Space that you selected.

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What to do next

- Create subfolders, Boards, and Docs in this new folder.
- Move any existing Boards, Docs, or folders into this new folder.



Managing work using Boards in CWM

Use Boards in Collaborative Work Management to define and organize tasks. With views such as List, Kanban, and Gantt, configure your workspace based on the way you and your team work.

https://player.vimeo.com/video/1049444492?h=672bbda3a0&badge=0&autopause=0&player_id=0&app_id=58479

Using the following sections, get started with Boards in the CWM workspace.

Create a Board in CWM

Manage work assigned to your team as tasks and track them to completion using customizable Boards for your shared Spaces in Collaborative Work Management.

Before you begin

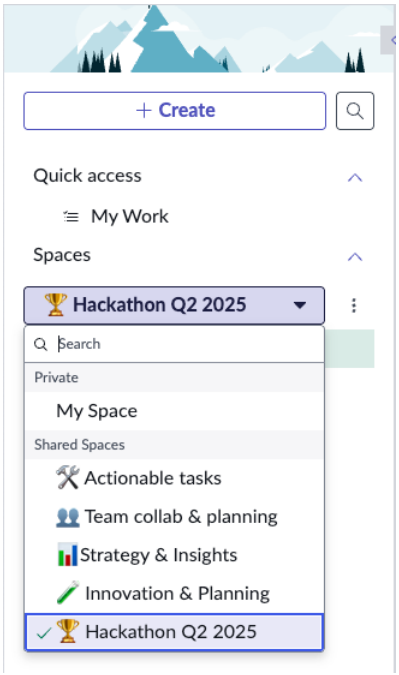
Create a Space in CWM.

Role required: sn_cwm.cwm_user

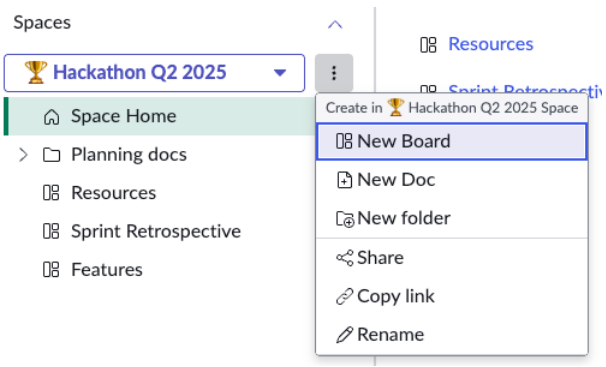
Procedure

1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From the Spaces menu, open a Space that you want to add a Board to.

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3. From the More options menu of the Space ( ), select **New Board**



s

4. In the **Board name** field, enter a name for the Board.
5. Select **Create**.

Result

A Board is created within the Space that you selected and an empty Board is shown in the workspace. You can add unlimited Boards to a Space, based on how you choose to manage your workflows.

What to do next

- Add tasks to the Board. See Add tasks to a CWM Board.
- Rename or edit other details of the Board using the Edit icon ( ) on the Board header.

Duplicate a Board in CWM

Save time by duplicating an existing Board to copy all the task and collaborator details without having to copy the information manually in the Collaborative Work Management workspace.

Before you begin

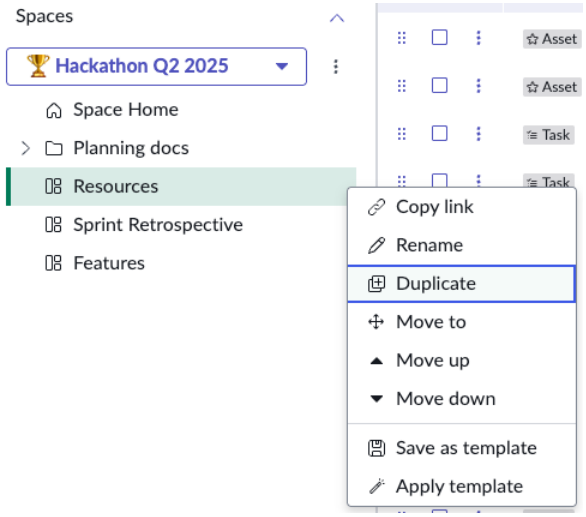
Create a Board in CWM.

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Role required: sn_cwm.cwm_user

Procedure

1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. Navigate to the Space that your Board is in.
3. From the **More actions** menu of the Board, select **Duplicate**.



4. Provide a name for the new Board in the **Board name** field.
   The default name given is in the format of **(Copy) <Original Board name>**.
5. Select **Duplicate**.

Result

- The new Board is added to the same Space as the original Board.
- If your original Board was in a folder, the new Board is added to the same folder.
- If necessary, you can move it to a different Space or a different position in the same Space.
- The states of all the copied tasks are reset to the default (open) state in the new Board.
- All the assigned tasks are reset to unassigned.
- The start date for the tasks shift to the current date.
- Any custom columns in the original Board are copied to the new Board.

Add tasks to a CWM Board

Start planning work on your Board by adding tasks and assigning them to team members in Collaborative Work Management workspace.

Before you begin

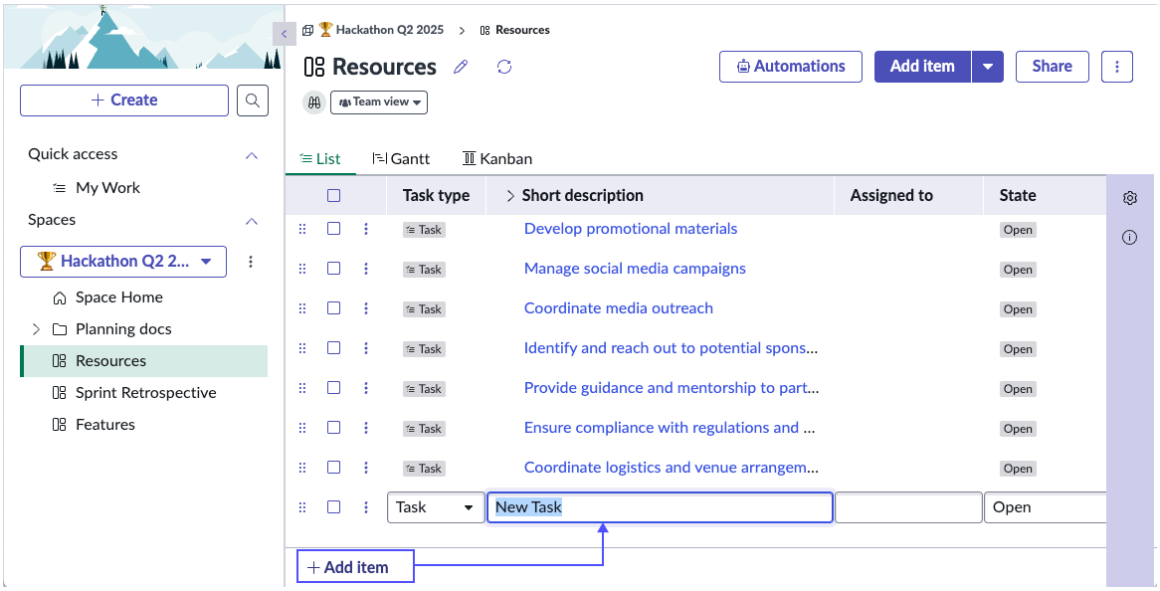
Create a Board in CWM.

Role required: sn_cwm.cwm_user

Procedure

1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From a Space, select a Board that you want to add tasks to.
3. From the Board footer, select **+ Add item**.

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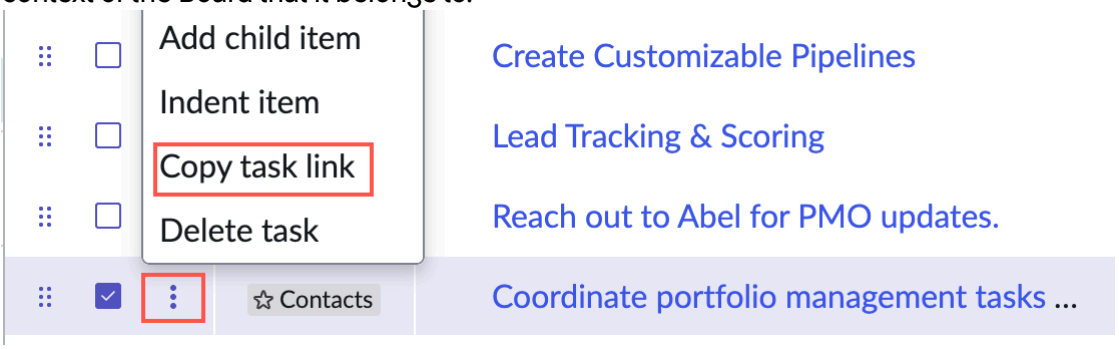


4. Fill in details such as the Type, Short description, Assigned to, dates, and others.

   The default work item types available in CWM are Task and Defect. If you want to create other work items such as Milestones or Events, you can create your own task type. See Create and manage custom work item types in CWM.

What to do next

- Add more tasks to the Board and assign them to yourself or members of your team.
- Edit the information of your task from the side panel by clicking the short description to open it or directly from the grid through inline editing by double-clicking a cell.
- Rearrange your tasks on the Board by using the drag-and-drop feature.
- Share tasks by their URL using the **Copy task link** option from the row context menu of the task. This way, when a user clicks the shared URL, the task opens in the side panel in the context of the Board that it belongs to.



Additionally, to enhance the planning and management of tasks, you can:

- Create additional columns for a task to add other details. See Add custom columns for tasks in a CWM Board
- Choose the columns to be displayed for the tasks on the Board. See Personalize List, Gantt and Kanban display for CWM Boards.

Create and manage custom work item types in CWM

Create custom item types for Boards in Collaborative Work Management, so that you can organize and manage multiple types of tasks from a single location, regardless of the workflow.

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Before you begin
Create a Board in CWM.

Role required: sn_cwm.cwm_user

About this task
Watch this video for information about creating a work item type.

Create custom work item type in CWM video. Approximately forty nine seconds long.

Procedure
1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. Navigate to the Board that you want to add custom tasks to.
3. From the Board header, select the More actions icon ( ) and select **Manage item types**.
4. From the Default item types section, enable or disable Task or Defect to be available for your Boards.
5. From the Custom work item types section, add a new item type.
   a. Select **Add new item type**.
   b. In the Item type name field, enter a name for the work item type.'
   c. Select an icon to represent the item type.
   d. Select the check box to make this item type available for use in the Board.
   e. Select **+ Add new item type** to repeat adding another item type.
6. After adding all required work item types, select **Save**.

What to do next
Add tasks of the new item type to your Board using the More actions menu ( ) on the Board header.

Add custom columns for tasks in a CWM Board

Create custom fields in a Board so that you can organize all details of tasks at a single location, thereby improving task management and saving time by reducing dependency on system admin.

Before you begin
Create a Board in CWM.

Role required: sn_cwm.cwm_user

You need to have either Editor or Owner access to the Space to add a custom column.

About this task
Watch this video for guidance on adding custom columns for tasks in a CWM Board.

Video for add custom columns for tasks in a CWM board. Approximately one minute and twelve seconds long.

Procedure
1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From a Space, select a Board that you want to add tasks to.
3. In the List view of the Board, select **Add column** from the column header and select a data type.

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4. In the **Field name** field, enter the name for this new column and other details, if asked.
   - If you select the type as **Label** or **Dropdown**, you're prompted to enter the options for this field.
   - If you select **People**, you're prompted to select the type of users available for this field. Also, choose to allow input of single or multiple users in this field.
   - If you select **Reference**, you're prompted to select a table that you want to add as reference to the tasks.
5. Select **Add column**.

Result
The new column is added to the task and you can start entering the values for this column.

> **Note:**
> Custom columns added for a task are local to the Board that they're created in and are not applicable to other Boards and Spaces in the workspace.

If you have the Owner access for this Space, you can delete any custom columns based on your changing requirements.

Add a goal to CWM Board

Associate a goal to your Board so that you can plan and track all the tasks and activities that contribute to this goal directly from the Collaborative Work Management workspace.

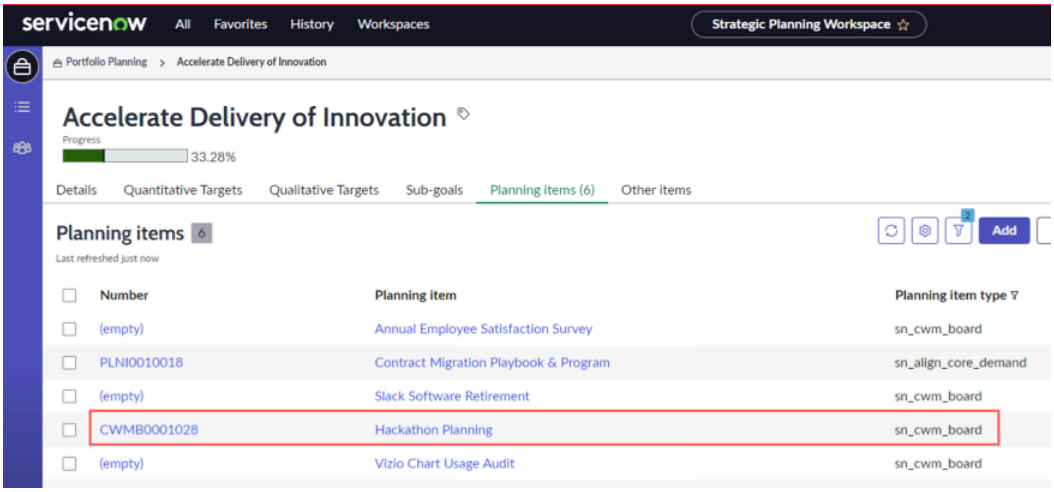
Before you begin
Create a Board in CWM.

Role required: sn_cwm.cwm_user

Procedure
1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From a Space, select a Board that you want to add a goal to.
3. Edit the Board by selecting the Edit icon ( ) from the Board header.
4. In the Board form on the side panel, select a goal from the **Primary goal** field.
5. Select **Update**.

Result
- Within CWM workspace: The current Board is associated with the selected goal, and is shown in the Board details page.
- Within Strategic Planning workspace: If the goal that you selected is part of a portfolio plan within Strategic Planning Workspace, you can see that this CWM Board is added to the goal as a planning item.

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Note:
CWM Board must be configured as a planning item for the lens that is used to create the portfolio plan. For more information, see Connecting CWM with Strategic Planning or Portfolio Planning.

Export a CWM Board to CSV or Microsoft Excel

Export the list view of Collaborative Work Management (CWM) Boards to CSV or Microsoft Excel so that you can use the data to obtain insights, share with stakeholders, and prepare for analysis or presentations.

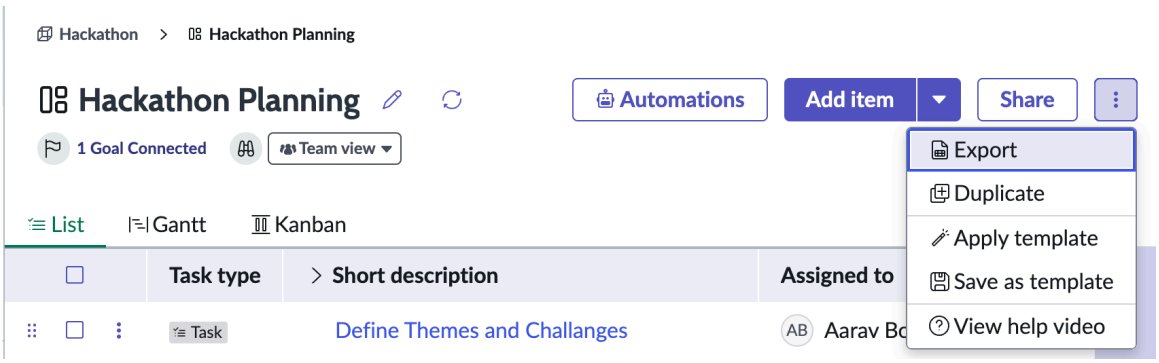
Before you begin

Create a Board in CWM

Role required: sn_cwm.cwm_user

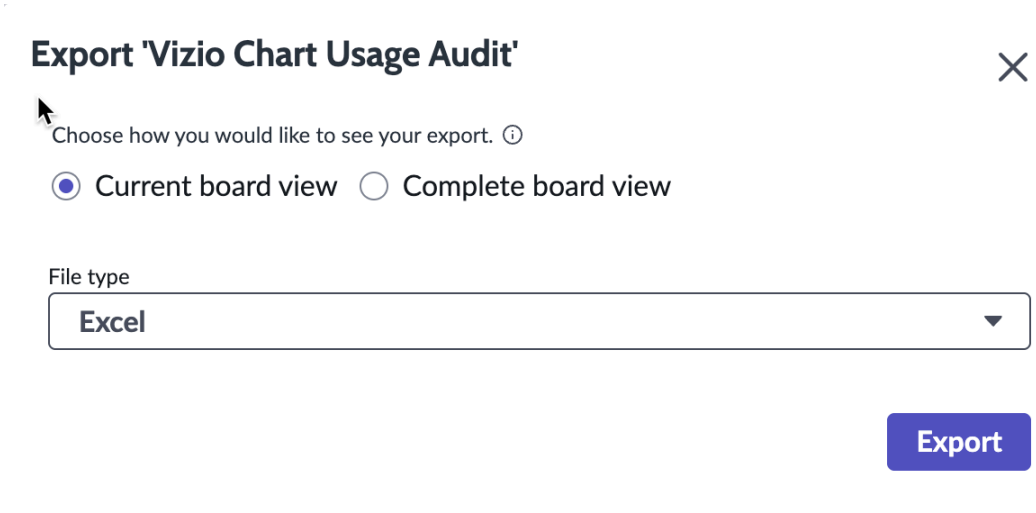
Procedure

1. Navigate to **Workspaces** > *`Collaborative Work Management`*.
2. From a Space, select the Board that you want to export.
3. From the Board header, select the More options icon (⋮), and then select **Export**.



4. In the Export dialog, select the Board view that you want to export and the file type.
5. Select **Export**.

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Note:
The exported file doesn't retain the hierarchy of the tasks from the Board and all links, including URLs, references to records and assigned users, are converted to plain text.

Result
The file is downloaded and saved in your local system.

Board views in CWM

Create, customize, and switch seamlessly between Board display preferences such as column display, sorting, and filtering based on the audience and purpose in Collaborative Work Management (CWM).

https://player.vimeo.com/video/1036476020?h=6a4e66d756&badge=0&autopause=0&player_id=0&app_id=58479

With Board views, you can save your preferred data views or create shared views to ensure a consistent experience across sessions and for the entire team. Saved preferences include column display, column order, sorting, filters, view mode display, Kanban vertical lane selection.

You can create multiple views for Board display personalization and come back to the view of your choice, without having to rearrange columns on the Board every time. The following are some more advantages of Board views:

- Save Board display preferences as personal or shared views.
- Create shared views for the team so that all the team members consuming the data have the same experience.
- Create multiple views for the same Board so that you can display data in a way that is fit for your audience.
- Quickly switch between views to avoid manually updating display preferences each time the audience is changed.
- Update the view preferences anytime to adapt to changing processes.

Board views in CWM can be classified as personal and shared:

My views

The Board display settings that are personal to you and are only available for you to access are grouped into **My views**. You can create multiple personal views and switch between them depending on your workflow patterns.

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Any display personalization settings that you have already applied to your Boards before upgrading to CWM version 4.0.1 are saved as your personal view, with the name **<Your name>'s view**.

Shared views

Shared views are available to all members that have access to the Board or Space. You can create multiple shared views for a Board so that each type of audience has a view that is customized for them.

> **Note:**
> Shared views cannot be created in **My Space** because it's your personal Space.

When you save a Board with shared views as a template, the shared views are also saved as part of the template. For more information on templates, see Templates in CWM for Boards and Docs.

The view that you last visited for a Board is saved as your user preference and is selected the next time you reload the Board.

Use the following sections to learn more on how to make the most out of Board views and their customizations for your team.

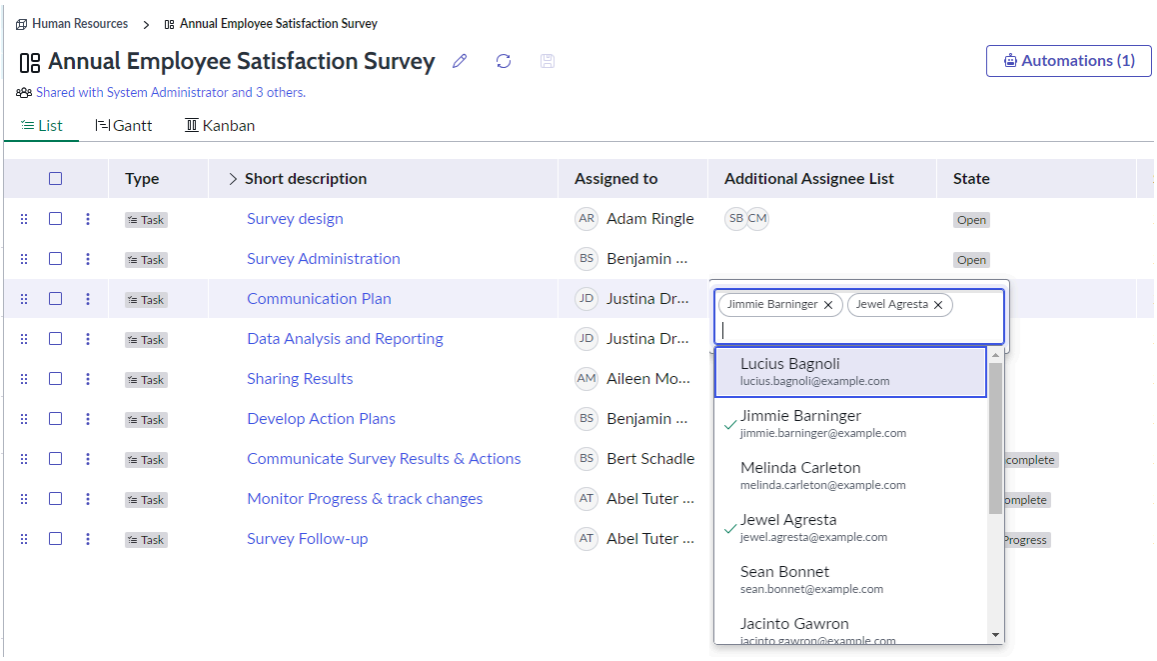
List, Gantt, and Kanban view modes for CWM Boards

Seamlessly switch between List, Gantt, and Kanban views of Boards in Collaborative Work Management and manage your tasks in flexible ways based on your workflows.

The following are the three types in which data for a CWM Board is displayed. You can customize how the data is presented and flexibly organize and manage work for your teams. For more information, see Personalize List, Gantt and Kanban display for CWM Boards.

List view

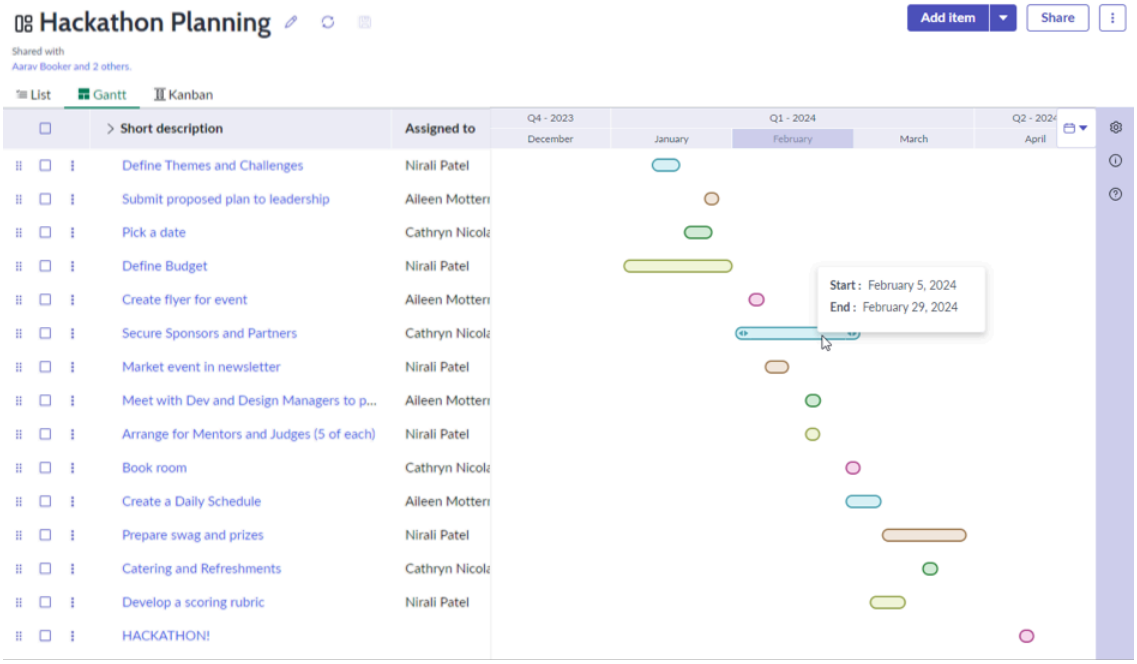
The List tab displays all tasks added to this Board in a grid format. Use this view to know the status of the tasks at a glance or to assign tasks to users on the go. The default number of tasks that can be displayed in the List view are 1,000.



Gantt view

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The Gantt tab provides a grid and a calendar view side by side so that you can easily reschedule tasks based on changing priorities. The default number of tasks that can be displayed in the Gantt view are 1,000.



Kanban view

The Kanban tab provides a vertical and horizontal categorization of tasks based on the selected attributes, for example, **Assigned to** and **Task type**. You can change this vertical lane and horizontal swimlane to any other attribute.

Some examples are:

- View the state of all CWM tasks and their Assigned to details by selecting Vertical lane as **Assigned to** and Horizontal lane as **State**.
- Review at a glance and change the priority of tasks for multiple assignment groups by selecting the vertical lane as **Priority** and Horizontal lane as **Assignment group**.

If you have Connected work on the Board, then a few combinations for Kanban board are:

- View all epics grouped by their state by selecting Vertical lane as **State** and Horizontal lane as **Task type**.

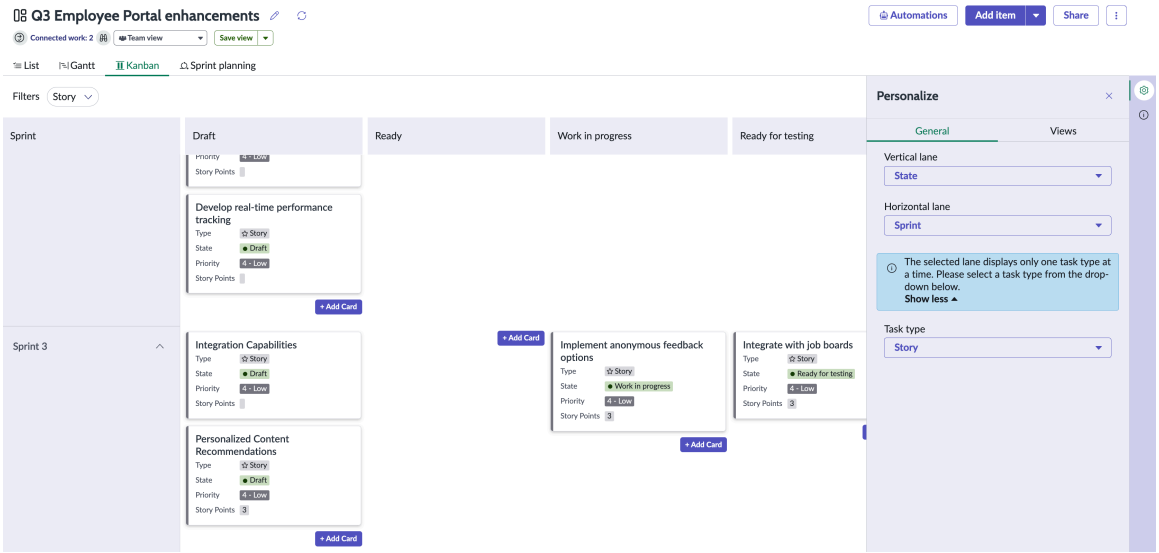
  You can then filter the Kanban board to show Epics.

- View all stories on the Board grouped by the Sprint they're planned in by selecting Vertical lane as **Sprint**, Horizontal lane as **Task type**.

  You can then filter the Kanban board to show connected stories.

The maximum number of vertical and horizontal swimlanes that can be displayed in the Kanban board are 50 each by default.

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Personalize List, Gantt and Kanban display for CWM Boards

Show, hide, or rearrange columns and apply sorting or filters to personalize the way data is displayed in Collaborative Work Management Boards based on your workflow.

Before you begin

Create a Board in CWM.

Role required: sn_cwm.cwm_user

Procedure

1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From a Space, select a Board that you want to personalize.
3. Select List, Gantt, or Kanban for the Board and select the Personalize icon ( ).
4. Update the display of the view on the Board or hide views.
5. For List and Gantt, use column actions ( ) such as pinning a column to the left of the grid, filtering the data from a column, and resetting the column size to default.

What to do next

After changing the way data is displayed on your Board, you have the option of saving it as a personal view for your reference or a shared view for your team or stakeholders. For more information, see Board views in CWM.

Create a custom view for CWM Boards

Modify Board display preferences and save them as custom personal or shared views that suit the working preferences for you and your team members in Collaborative Work Management (CWM).

Before you begin

Create a Board in CWM.

Role required: sn_cwm.cwm_user

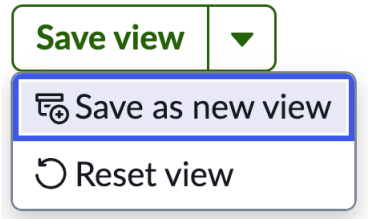
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About this task

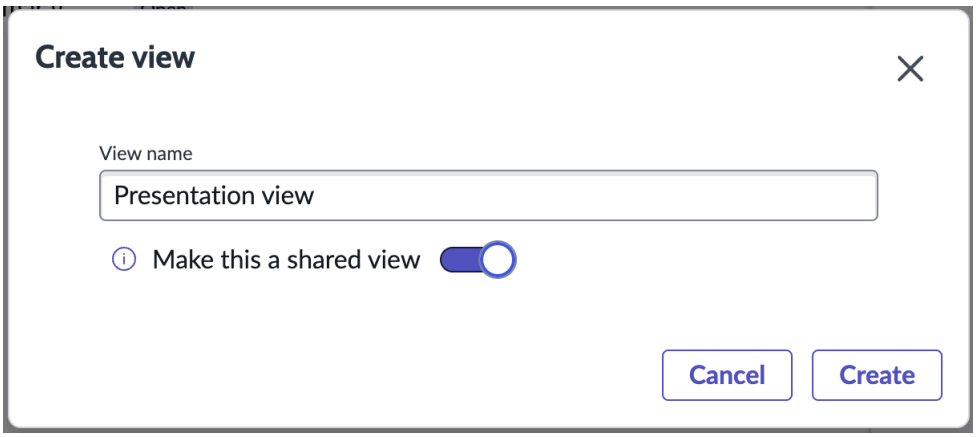
Use the personalization settings to change how the data is presented on a CWM Board and save the changes as a new view. You can create a different custom view for each of the List, Gantt, and Kanban view modes or save them all into a single view.

Procedure

1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From a Space, select a Board that you want to create a view for.
3. Modify the display preferences of the Board data using the personalization settings, sorting, filtering, and adding custom columns.
   For more information, see Personalize List, Gantt and Kanban display for CWM Boards.
4. Select the More actions icon (▾) of the Save view menu and choose **Save as new view**.



5. Enter a name for this view and choose to make it a shared view or keep it a personal view. Shared views are available for all members who have access to this Board. Not selecting this option saves this view as a new personal view that's only available to you.

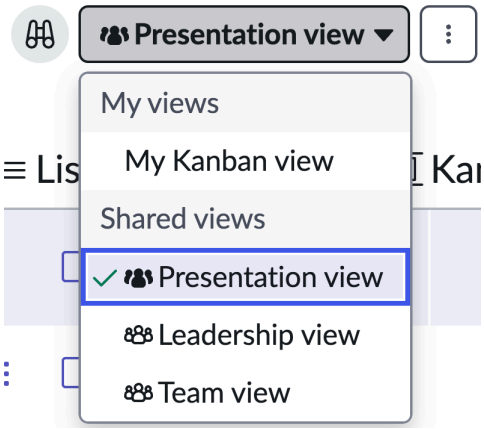


6. Select **Create**.

Result

The new view is available in the view switcher.

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Update a CWM Board view

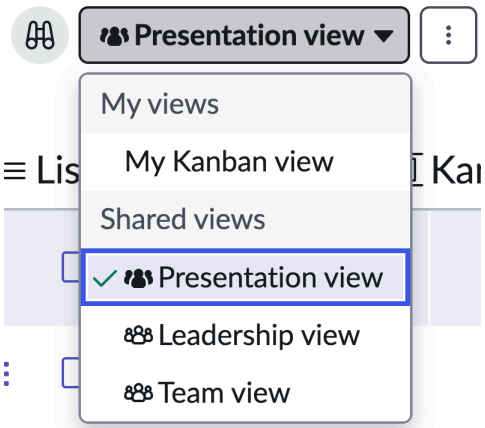
Modify the display preferences of your Collaborative Work Management (CWM)Boards and update the existing personal or shared views.

Before you begin

Role required: sn_cwm.cwm_user

Procedure

1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From a Space, select a Board for which you want to update a view.
3. From the view switcher, select a view that you want to modify.

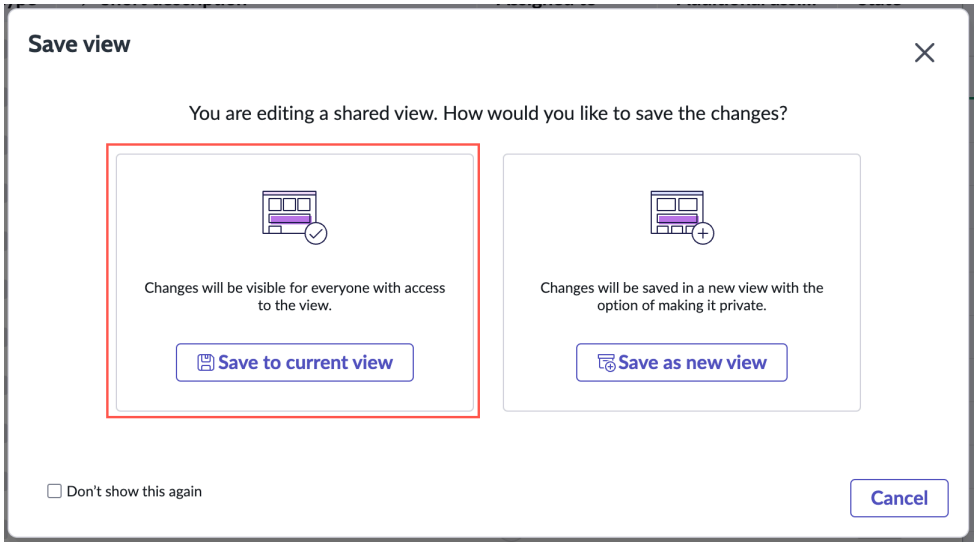


4. Modify the display preferences of the Board data using the personalization settings, sorting, filtering, and adding custom columns.
   For more information, see Personalize List, Gantt and Kanban display for CWM Boards.
5. Select **Save view**.



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6. Select **Save to current view**.



Note:
If you select the **Don't show this again** checkbox, this dialog box doesn't appear the next time.

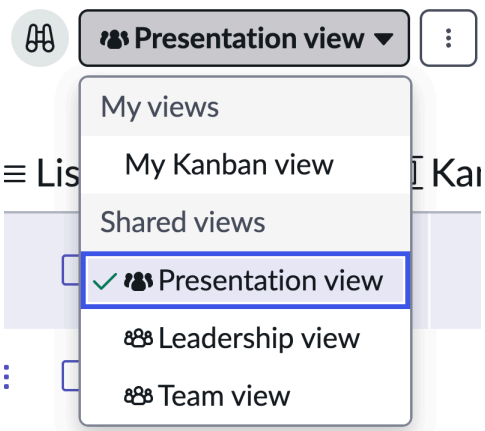
Result
The current view is updated with the changes that you made.

Delete a custom CWM Board view

Delete the custom personal or shared views for your CWM Boards and keep your Board views current for your workflow.

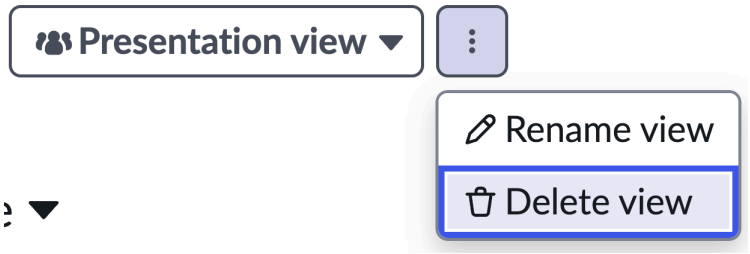
Before you begin
Role required: sn_cwm.cwm_user

Procedure
1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From a Space, select a Board for which you want to delete a view.
3. From the view switcher, select a view that you want to delete.



4. From the More view options menu (⋮), select **Delete view**.

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5. Select **Delete** to confirm.

Result
The view is deleted and no longer available in the view switcher for this Board.

Work item automations in CWM

Boost team efficiency by automating monotonous actions such as sending notifications and emails, monitoring key dates, or reassigning tasks based on the conditions that suit the team's workflow.

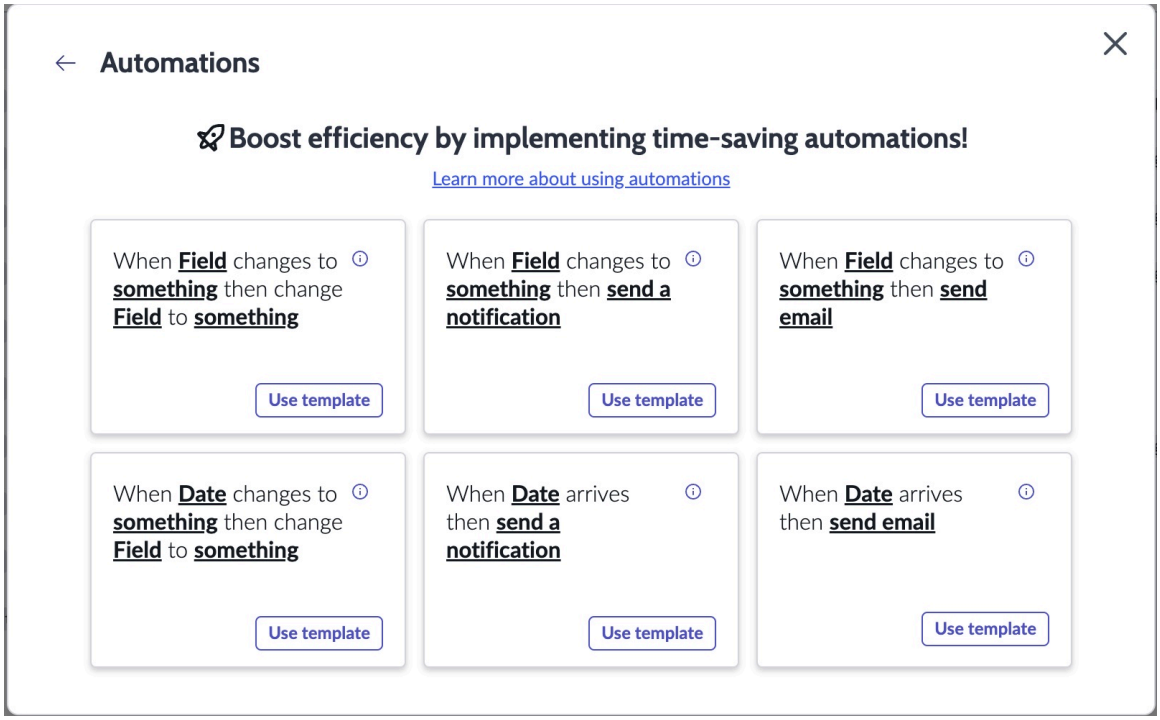
When teams work together, they often spend much time and manual effort on workflow activities. To address this issue and help improve the overall team efficiency, team members can create automations for tasks in CWM Boards.

Automations in CWM are actions that are triggered when certain conditions are met. Once created, these automations are applicable to all work items in the Board that they’re created in. Some examples of automated actions are:

- Sending an email when a task assignment is changed.
- Updating task priority when the due date is moved.
- Reassigning tasks when the priority is changed.
- Sending a notification when a task is complete.
- Notifying a task assignee dynamically when the priority is changed.

Six predefined templates are provided in the application to help you build multiple simple or complex conditions and automate actions for your work items.

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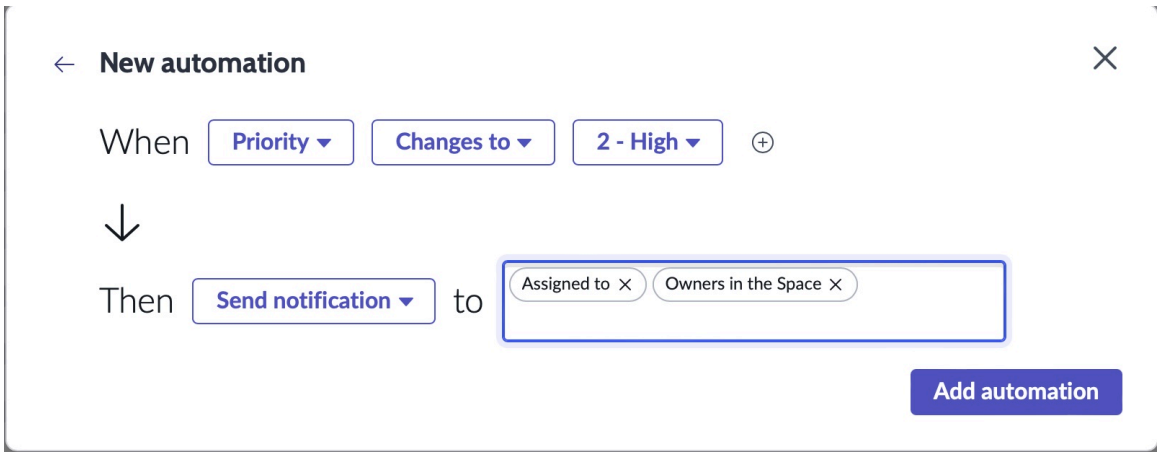


Based on the changing conditions of your team's workflow, you can edit, disable, or delete automations anytime later. For a Board, a maximum of 10 automations can be created, which includes all the active and inactive ones.

In this example automation, when the **Priority** of a task on this Board changes to **High**, the people in the **Assigned to** column of the task and the owners of this Space are notified of it.

Going forward, when the priority of any item of this Board changes to High, a notification is sent to the user assigned to that task and the Space owners. Thus this automation saves the time that it takes to perform this action manually instead.

Note:
You can also send notifications to any user if you've added a custom people column in addition to the default Assigned to or Additional Assignee.



Get started with automations in CWM. See Create automations in CWM.

Create automations in CWM

Add conditions to build task automations for CWM Boards and help your team save time from manual task updates.

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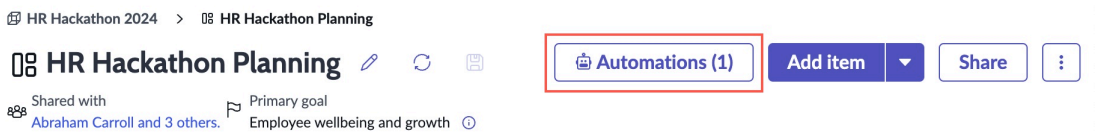
Before you begin

Create a Board in CWM.

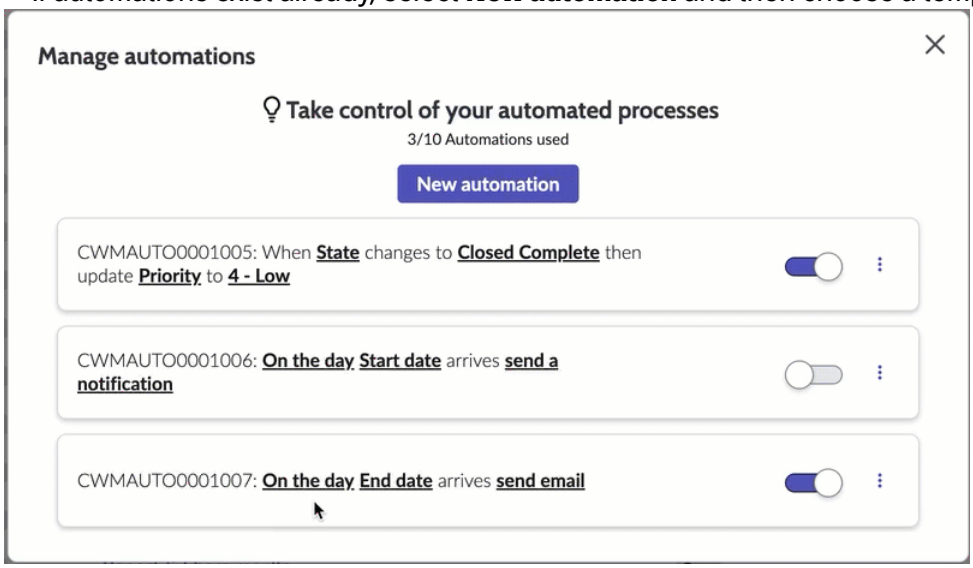
Role required: sn_cwm.cwm_user

Procedure

1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From a Space, select a Board that you want to create automations for.
3. From the Board header, select **Automations**.



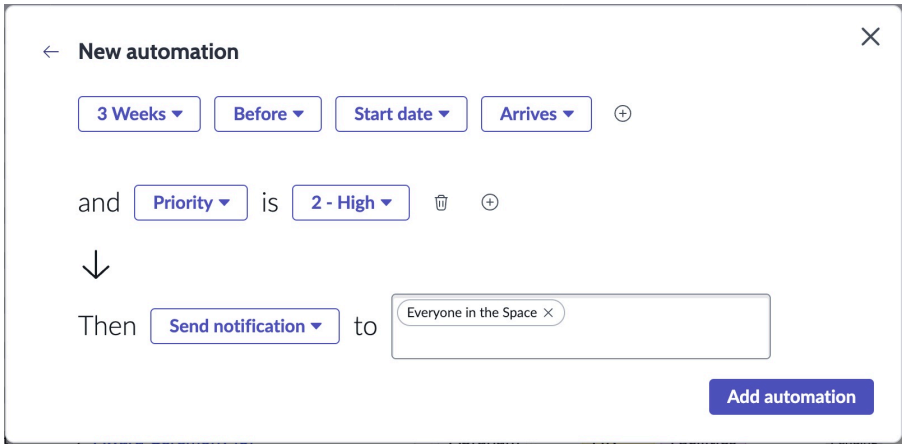
4. Choose a predefined template.
   - If it's your first automation, choose a template to get started.
   - If automations exist already, select **New automation** and then choose a template.



5. Add conditions for automating the activities of updating a field, sending an email, or sending notifications.

   You can add multiple conditions to act as triggers to an automation. For example, an automation can be created to send a notification to everyone in the Space when it meets the following conditions:
   - Task priority is high.
   - The start date is three weeks away.

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6. Select **Add automation**.
7. Repeat the steps to add more automations.

> **Note:**
> You can create up to 10 automations for a Board and the automations are applied only to CWM tasks and not any connected work items on the Board.

What to do next
Manage or delete automations in CWM.

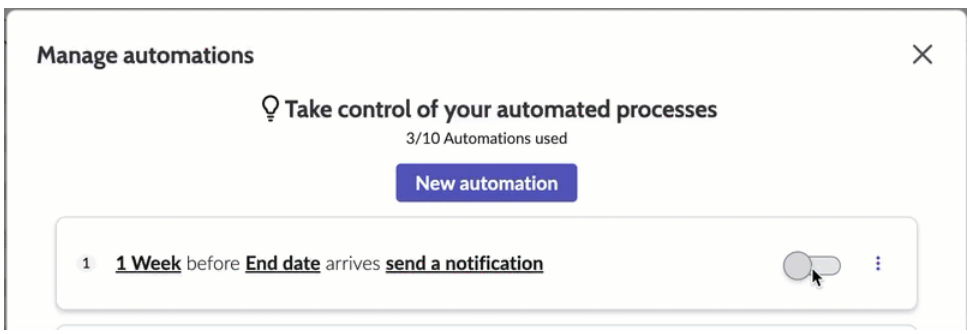
Manage or delete automations in CWM

Edit, disable, or delete automations for your Boards in Collaborative Work Management based on the changing conditions of your team's workflow.

Before you begin
Create automations in CWM.

Role required: sn_cwm.cwm_user

Procedure
1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From a Space, select a Board that you want to edit the automations for.
3. From the Board header, select **Automations**.
4. Choose to enable, disable, edit, or delete an automation.
   - To disable an active automation, switch the toggle off.
   - To enable a disabled automation, switch the toggle on.



   - To edit an automation:

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a. Select **More actions** and select **Edit**.

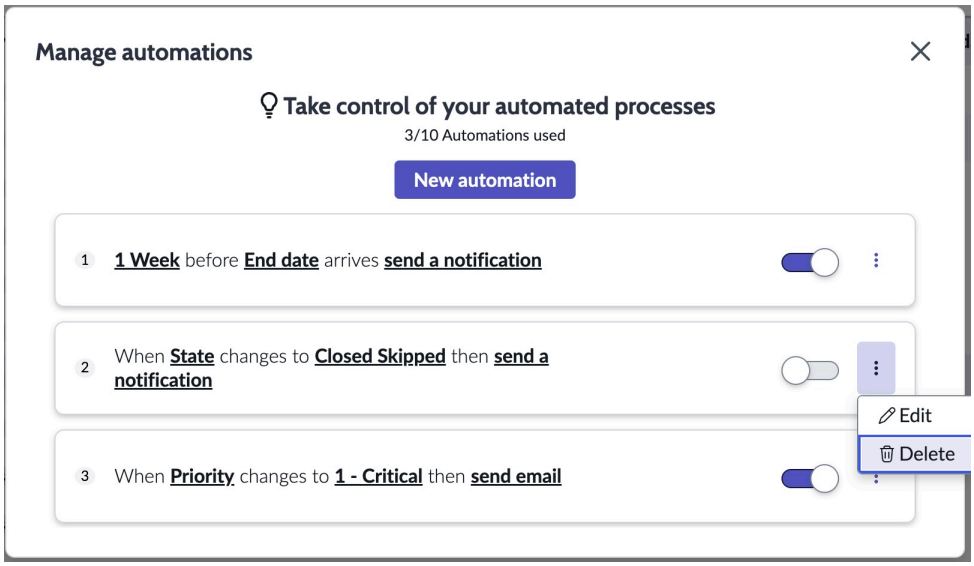
b. Update the conditions.

c. Select **Save automation**.

- To delete an automation:

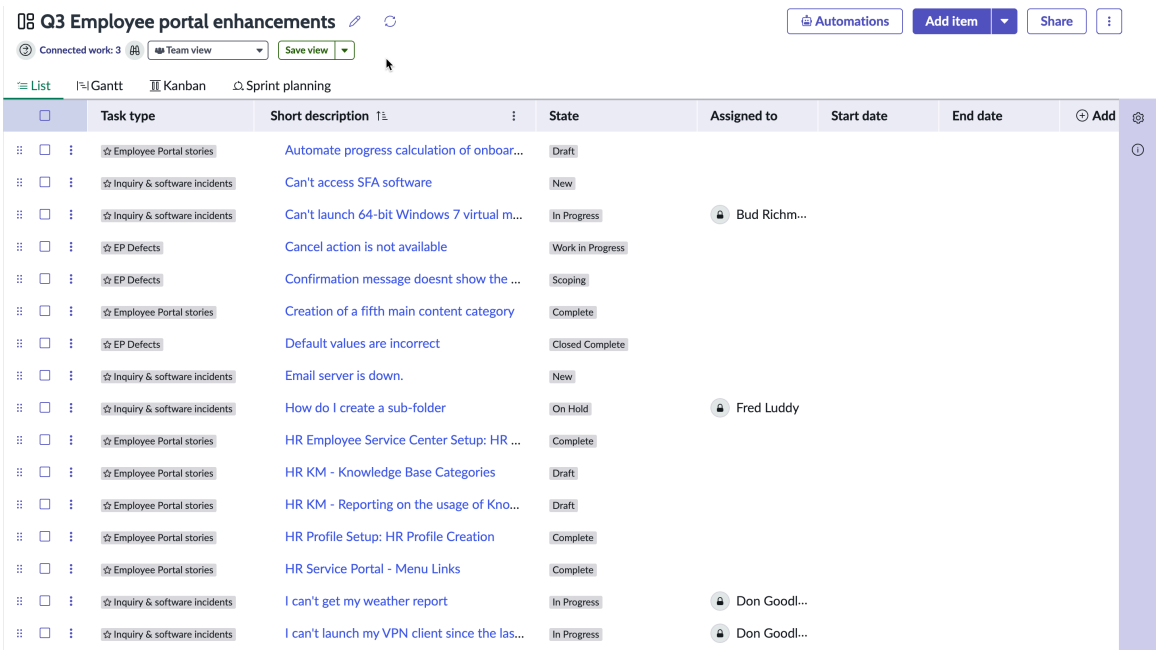
a. Select **More actions** and select **Delete**.

b. Confirm by selecting **Delete**.



Connected work in CWM

Streamline task management for teams by bringing in various work items from across ServiceNow applications into Boards in Collaborative Work Management.



The Connected work feature in CWM enables bringing in all types of work items from applications across the ServiceNow AI Platform, thereby helping streamline collaboration, planning, and execution for all teams. Here's how it works:

Centralized view

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Teams can connect various types of work from different ServiceNow applications to a single CWM board. By defining conditions for the work items, the teams can bring in only those work items that they need. This consolidation ensures that all relevant work is visible in one place, reducing the need to switch between multiple workspaces. For more information, see Connect work from other ServiceNow apps to CWM Boards.

Flexible planning

Once the work is connected, teams can plan and manage it efficiently. They can plan them into sprints for agile execution, or follow a free-flow methodology, ensuring that tasks are prioritized and tracked in the way that the teams choose to.

For sprint planning, the connected work items are automatically displayed in the Backlog pane of the Board's Sprint planning view. From here, the team can schedule work into sprints and proceed with execution. For more information, see Plan work items into sprints in CWM.

Real-time updates

Teams can update the status and other details of connected work items directly from the side panel within the CWM board. This real-time updating capability enhances transparency and keeps everyone involved on the same page. For more information, see Update details of connected work items in CWM Boards.

Deleting a connected work item record only removes it from the Board in CWM but doesn't delete the original record.

Improved efficiency

By centralizing work and providing a unified environment, Connected work helps teams stay focused and reduces the time spent navigating between different workspaces. This can help lead to increased productivity and collaboration.

Connect work from other ServiceNow apps to CWM Boards

Enable a consolidated view of all relevant work by connecting work items from different ServiceNow applications to a Board in Collaborative Work Management.

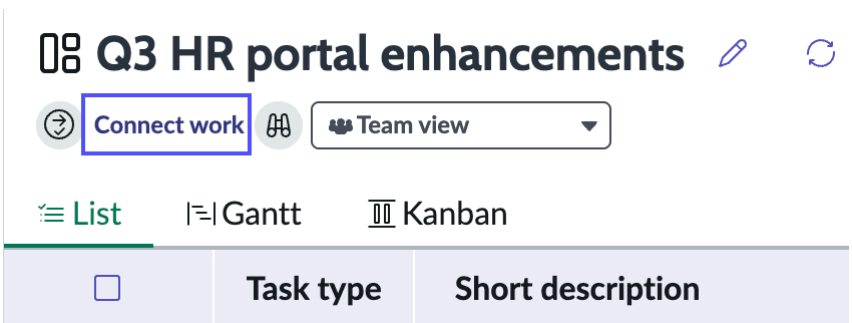
Before you begin

Role required: sn_cwm.cwm_user

Procedure

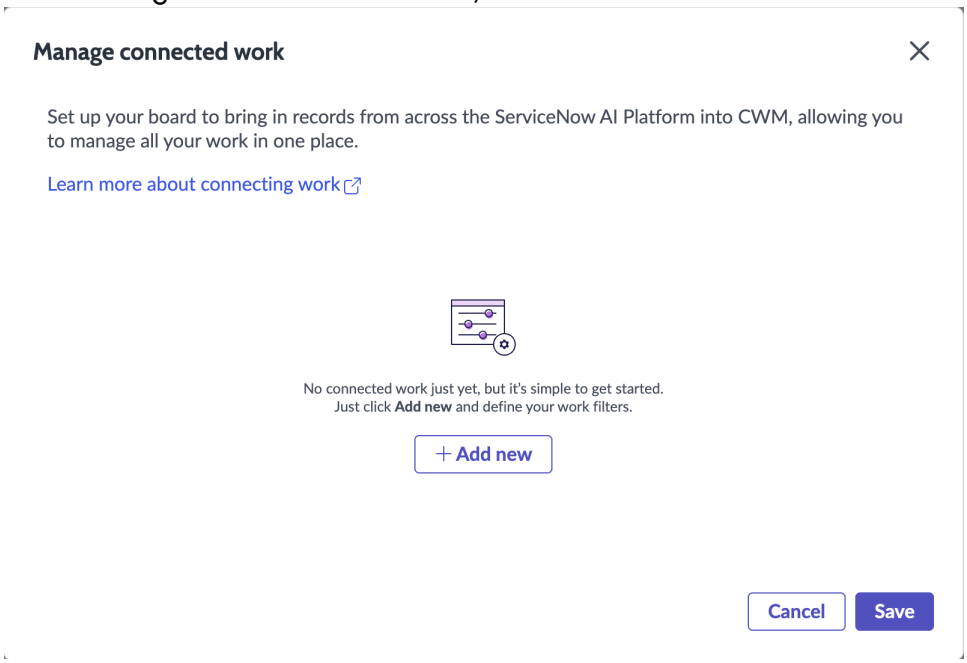
1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From a Space, select a Board that you want to connect work for.
3. From the Board header, select **Connect work**.

If you already have connected any work items, then this label is displayed as **Connected work**.



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4. In the Manage connected work modal, select **+ Add new**.



5. Choose a table and define the conditions to filter the records from the selected table.

   a. From the **Table** field, select a table.
   For example, to bring in all the incidents, select the Incident [incident] table.

   > **Note:**
   > Only those tables that you have access to and from the applications that are already installed and active in your ServiceNow instance are available for you.

   b. Change the value in the **Name** field according to your requirement.

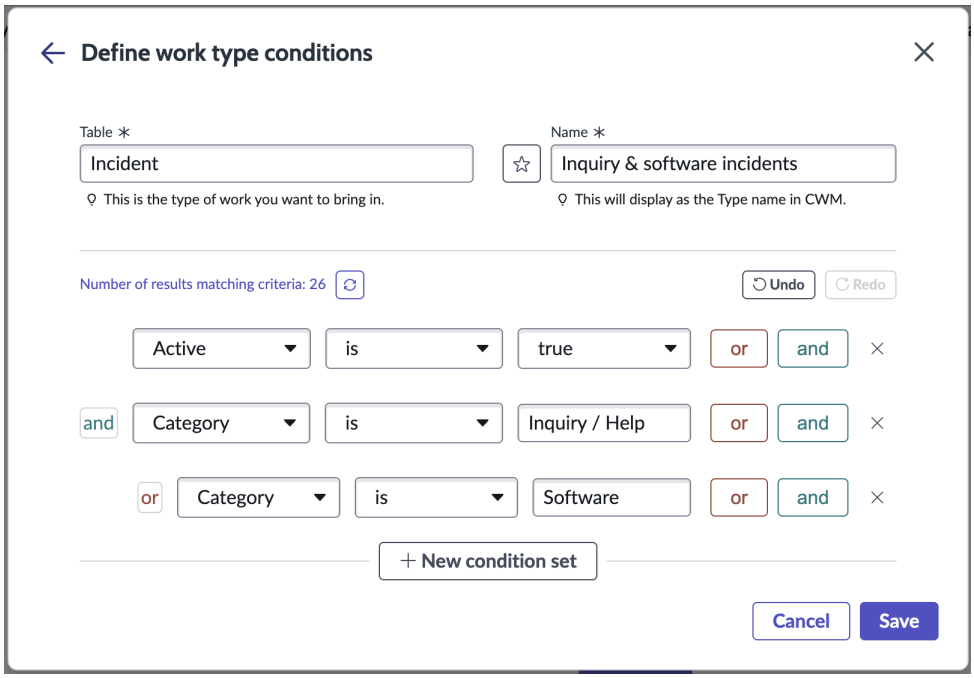
   c. Use the condition builder to add conditions and filter the records from the table you selected.
   For example, you'd like to bring in incidents that are active and belong to certain categories. Then, your condition set would be similar to the following:

   Active is true and **Category is Inquiry / Help** or **Category is Software**.

   d. Select the Update count icon ( ) to check the number of records that exist which match the filter criteria that you defined.

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Note:
Ensure that the number of records available for your filter criteria are not more than 100. You can change this number by default to 500 by working with your admin to update the system property *sn_cwm.connect_work_import_limit*.

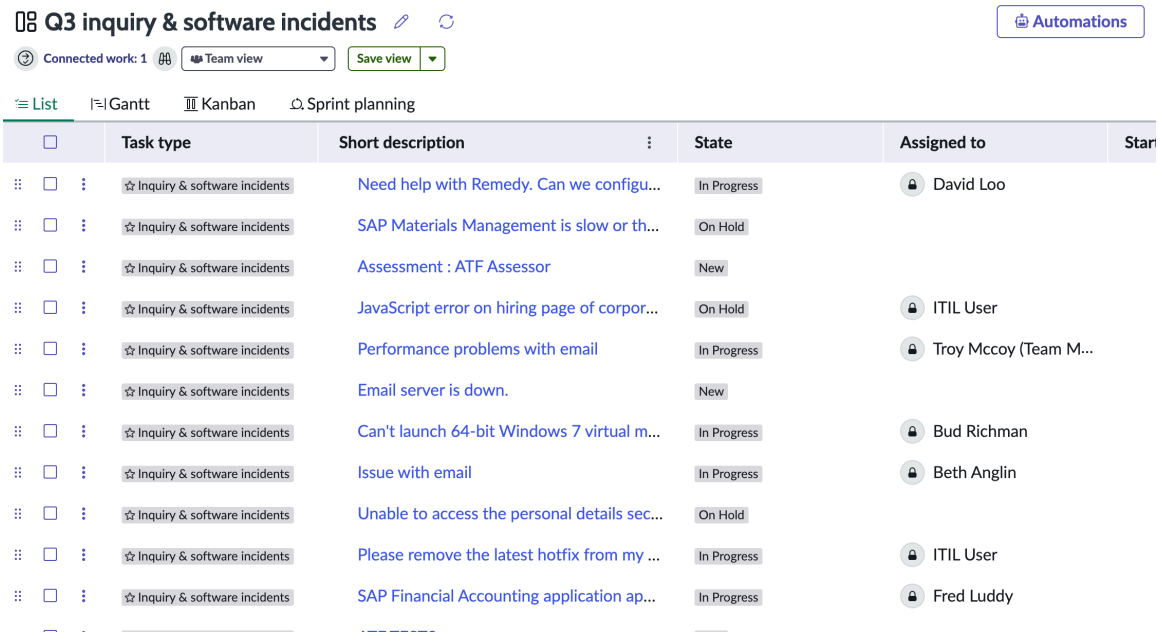


6. Select **Save**.
7. Repeat steps 4 through 6 to connect work items of other types.
   You can connect up to 10 work item types to a Board and you can add only one connected work configuration per table.
8. Select **Save**.

Result

- The Board is refreshed to load and display all the connected work items.
- Any existing information such as Assigned to, State, and Start and End dates is also shown on the Board.
- With the Sprint planning view enabled, you can see all these connected work items in the Backlog list. For more information about performing sprint planning, see Sprint planning in CWM.

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Related topics

- Manage connected work item types in CWM
- Update filter conditions for connected work in CWM

Manage connected work item types in CWM

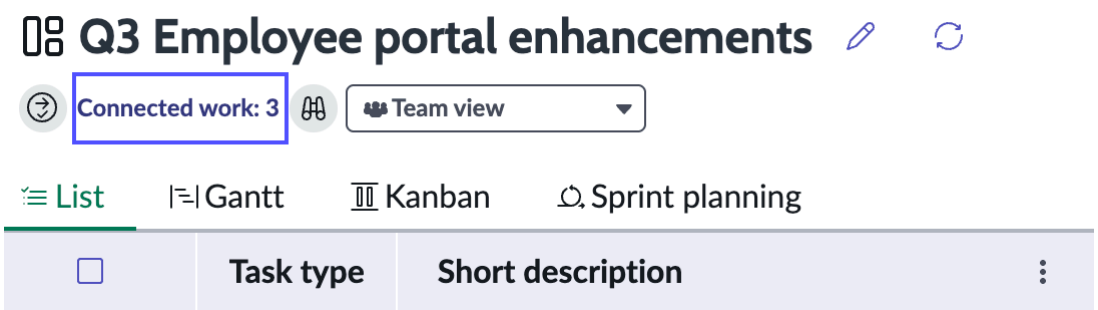
Enable, disable, refresh data, or delete the connected work item types on your CWM Board to keep the work items up to date based on changing requirements.

Before you begin

Role required: sn_cwm.cwm_user

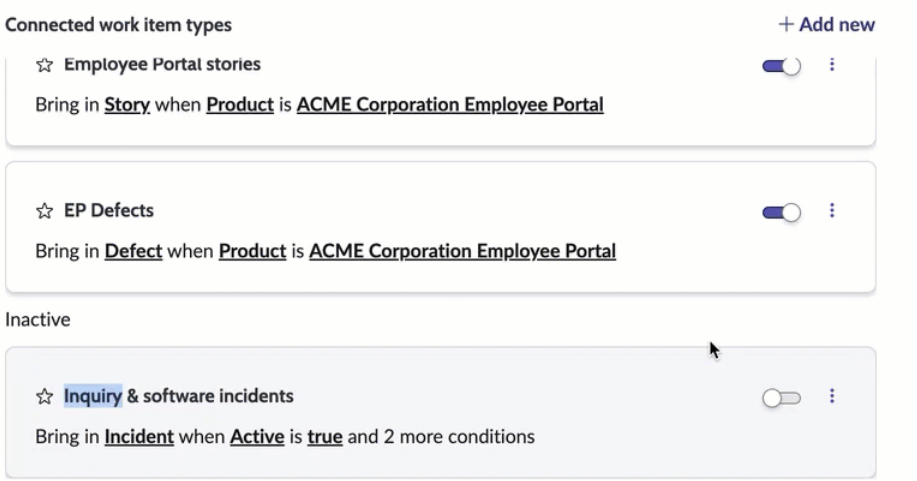
Procedure

1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From a Space, select the Board that you want to manage the connected work item types for.
3. From the Board header, select **Connected work**.



4. From the Manage connected work modal, disable or enable any existing work item type.

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5. Update the filter conditions for a work item type by selecting **Edit** from the More actions menu (⋮).
   For more information, see Update filter conditions for connected work in CWM.

6. Select **Refresh data** from the More actions menu (⋮) to fetch any latest records for the work item type that you defined.



7. If the work item type is no longer necessary, you can delete it.
   a. From the More actions menu (⋮) of a work item type configuration, select **Delete**.
   b. From the Delete configuration modal, select **Confirm**.
8. After you have done all the required changes, select **Save**.

Result
The Board is refreshed to load the work items based on your changes.

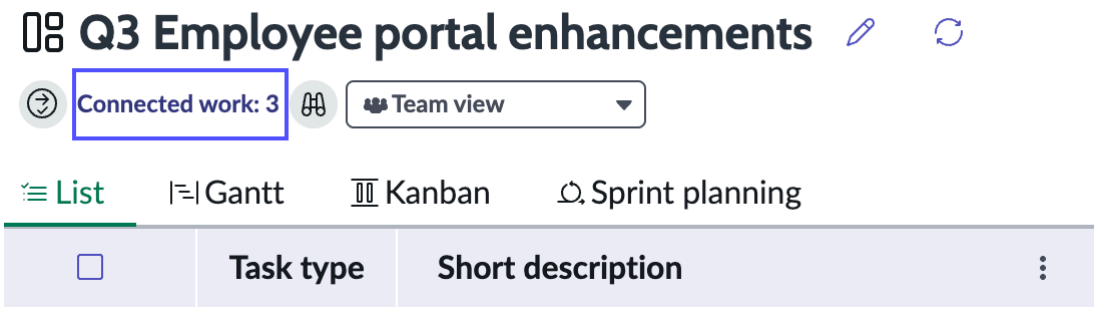
Update filter conditions for connected work in CWM

Update the filter conditions for connected work item types in Collaborative Work Management Boards so that the work items displayed in the Board reflect your team's current workload.

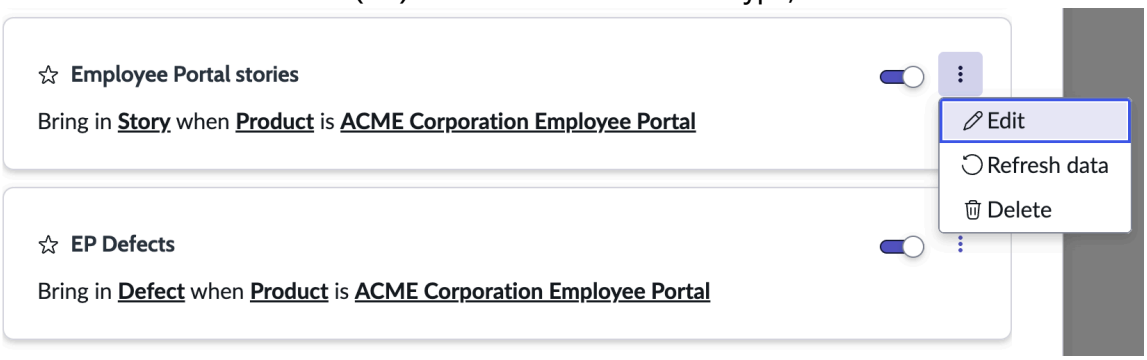
Before you begin
Role required: sn_cwm.cwm_user

Procedure
1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From a Space, select the Board that you want to manage the connected work item types for.
3. From the Board header, select **Connected work**.

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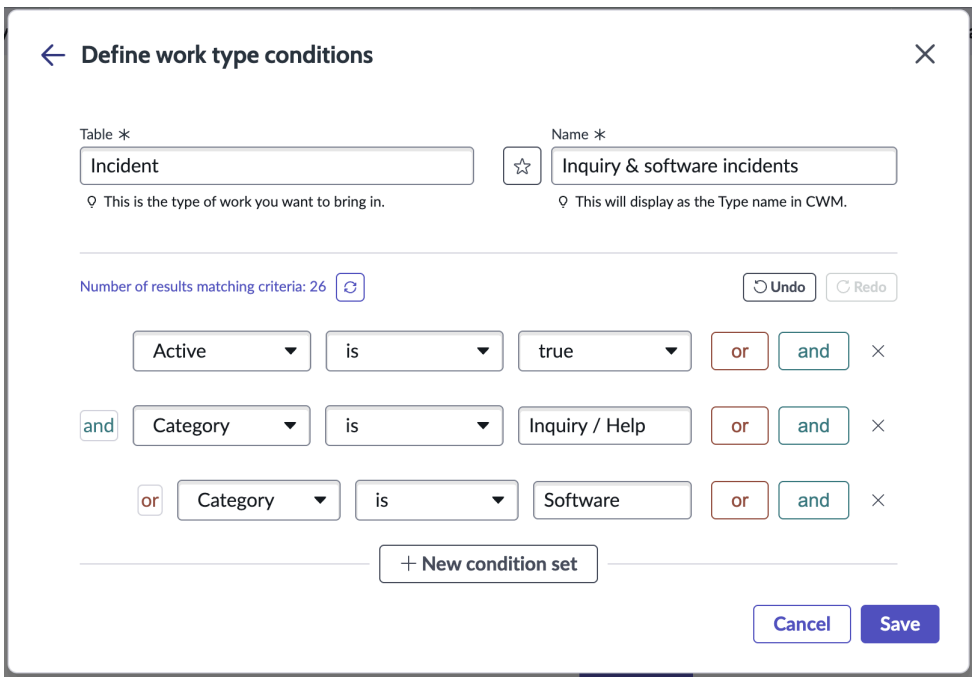


4. From the More actions menu (⋮) of a connected work item type, select **Edit**.



5. Use the condition builder to edit the defined conditions.
6. Select the Update count icon ( ) to check the number of records that exist which match the filter criteria that you updated.

Note:
Ensure that the number of records available for your filter criteria are not more than 100.



7. Select **Save**.
8. Repeat steps 4 through 7 to update conditions of any other connected work item type.
9. After all required changes are made, select **Save** in the Manage connected work modal.

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Result
The Board is refreshed to load the work items based on your changes.

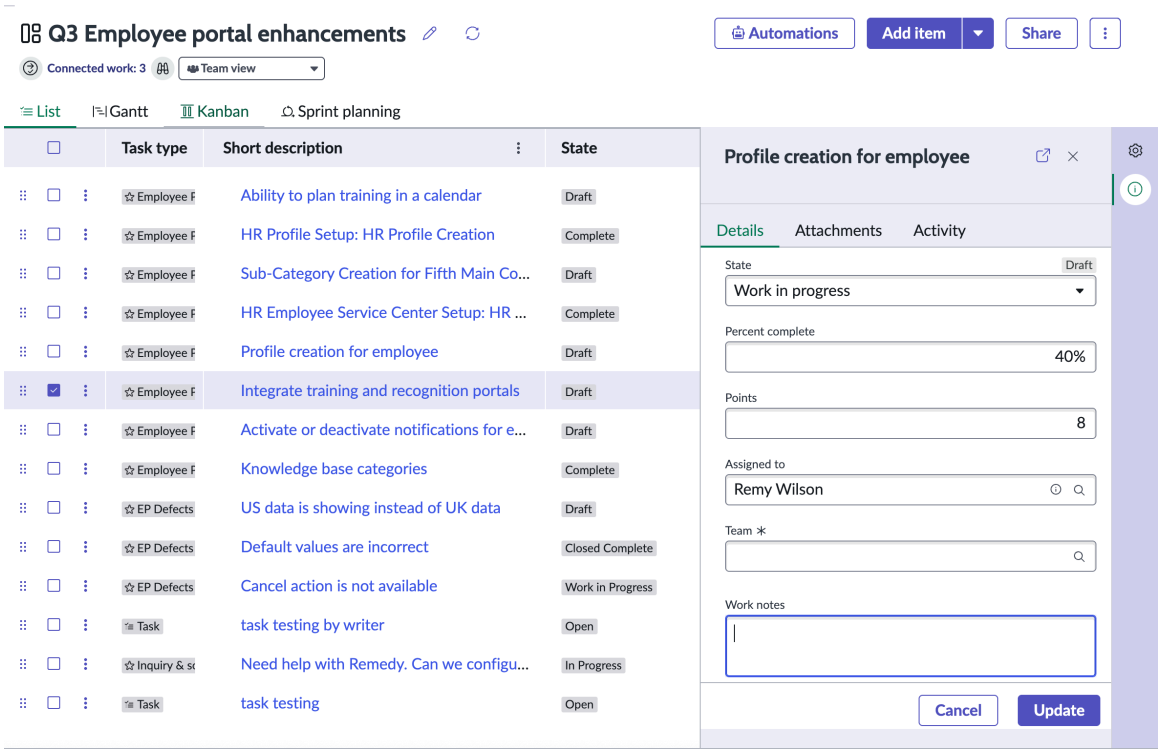
Update details of connected work items in CWM Boards

Learn how to update the status, assigned to, and other details for the work items that are brought into your Collaborative Work Management Board through Connected work.

Before you begin
Role required: sn_cwm.cwm_user

About this task
The details of connected work items can be updated only from the side panel and not through in-line editing in the grid. However, deleting the connected work items from the Board will only remove them from the Board but won't delete the original record.

Procedure
1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From a Space, select the Board with connected work items that you want to update.
3. From the List, Gantt, Kanban, or Sprint planning view, open the item details in the side panel.
4. Update the required details.
   You can also choose to open the original record form and update the details from there using the Detailed form view icon ( ).



5. If you've edited the details in CWM, select **Update** or **Save**.

Result
The updated information is available on the work item both in CWM and in its parent application.

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Sprint planning in CWM

Plan, track, and manage work for your teams in the Agile methodology using Sprint planning in Collaborative Work Management.

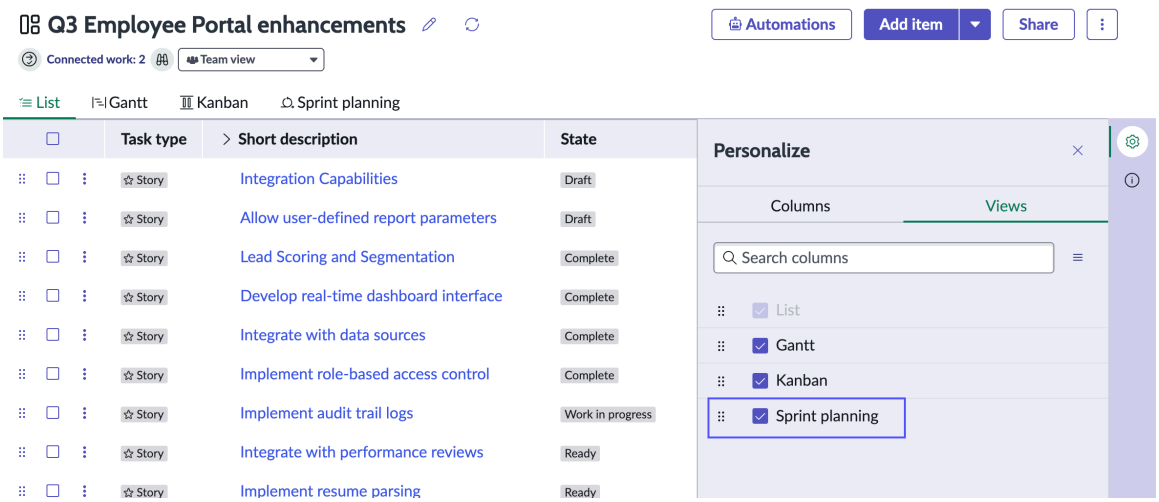
Within the Sprint Planning view of your CWM Board, you can manage your team's backlog, create sprints, plan work into sprints, and execute them seamlessly. All existing work items on your CWM Board are automatically added to the Backlog pane in the Sprint Planning view. This means that whether the work items are old or new, they will all be visible in the Backlog. From this pane, you can easily schedule these items into sprints for execution.

You have the flexibility to create work items of various types, such as Stories, or use any other default and custom work types that are available on your CWM Board. This flexibility ensures that you can tailor your sprint planning to fit the specific needs of your team and projects.

Enabling Sprint planning view

From the Views section of the Personalize ( ) side panel, select Sprint planning to enable the display of Sprint planning view on your CWM Board.

Note:
Save your Board view to ensure that the Sprint planning view is always displayed on your Board.



Backlog

The Backlog pane displays all unplanned work items, including both newly added and older incomplete tasks. Completed work items are not shown, keeping your focus on what needs to be done. You can add work items directly to the Backlog from this view and use the personalize side panel to show or hide columns within the Backlog pane, customizing the display to suit your needs.

Within the Backlog pane, you can do the following:

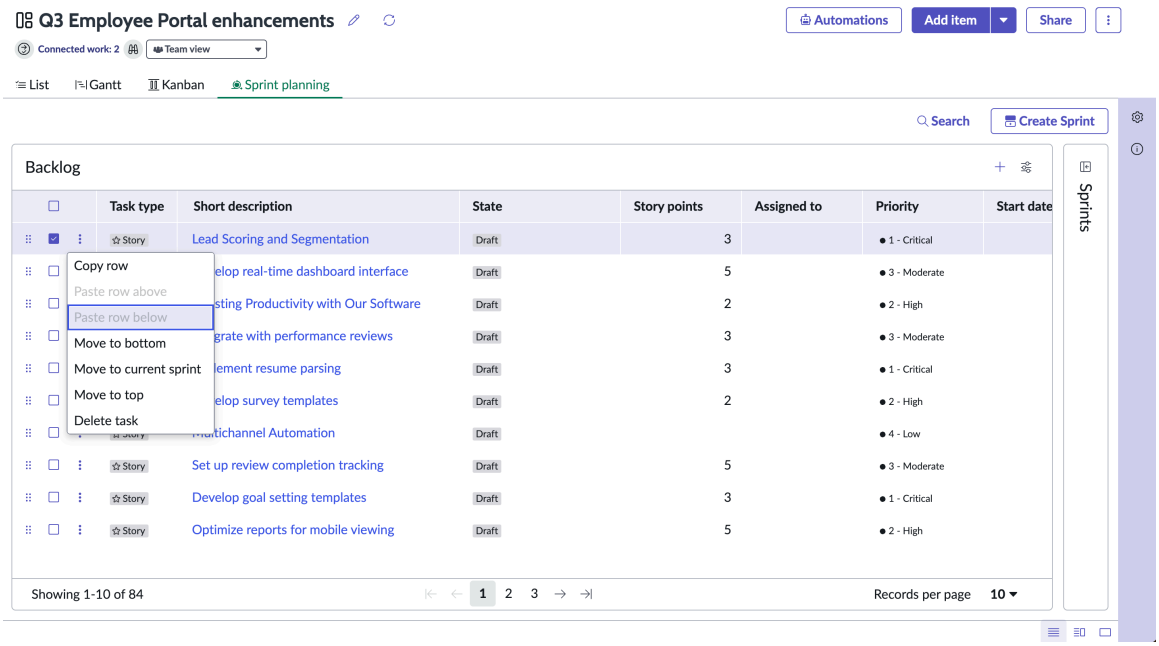
- Move work items to the top or bottom of the backlog based on the priority.
- Move items to the currently ongoing sprint.
- Move work items within the list by rearranging rows.
- Delete work items.
- Apply filters on any column. However, filters can't be applied on custom columns within Backlog.

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- Change the number of items displayed per page.
- Duplicate work items by using **Copy row**.

> **Note:**
> You can duplicate only CWM tasks and Stories but not other connected work records.

- Drag and drop a single or multiple work items from Backlog to one of the sprints.

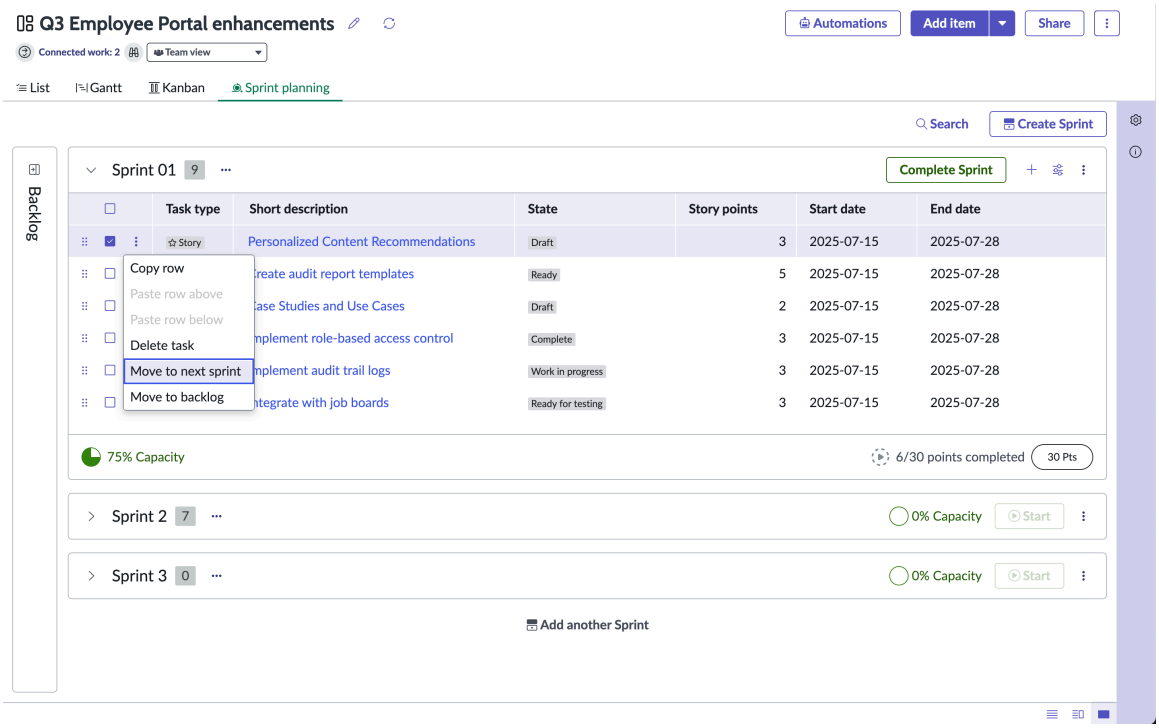


Sprints

The Sprints section in your CWM Board displays the list of active sprints. If you haven't created any sprints yet, this section will show a form to help you get started. You can create a sprint by selecting the sprint duration, start and end dates, and story points capacity. To create additional sprints with the same settings, use the **Add another Sprint** option. For sprints with different durations or capacities, select **Create Sprint**. For more information, see Create a sprint in CWM.

Each sprint is a collapsible section where you can add work items directly and customize the view using the personalize side panel. Each sprint section also shows the percentage of utilized capacity and the remaining story points, helping you manage your team's workload effectively.

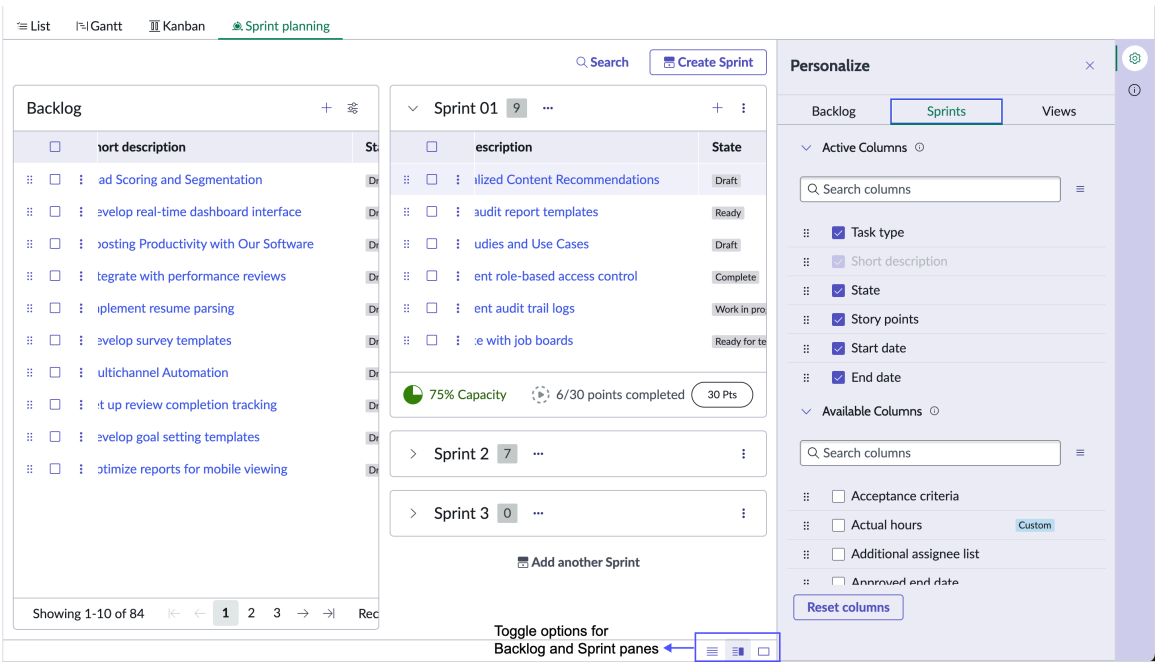
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Personalizing Sprint Planning view

You can customize the columns displayed in the Backlog and Sprint panes using the Personalize ( ) side panel, allowing you to see the most relevant information. Any changes you make can be saved to the current Board view or as a new view, depending on your needs.

If you require more working area for the Backlog or Sprints within the Sprint planning view, you can toggle between the **Backlog**, **Sprints**, and **Backlog and Sprints** options.



Add work items to Sprint planning Backlog in CWM

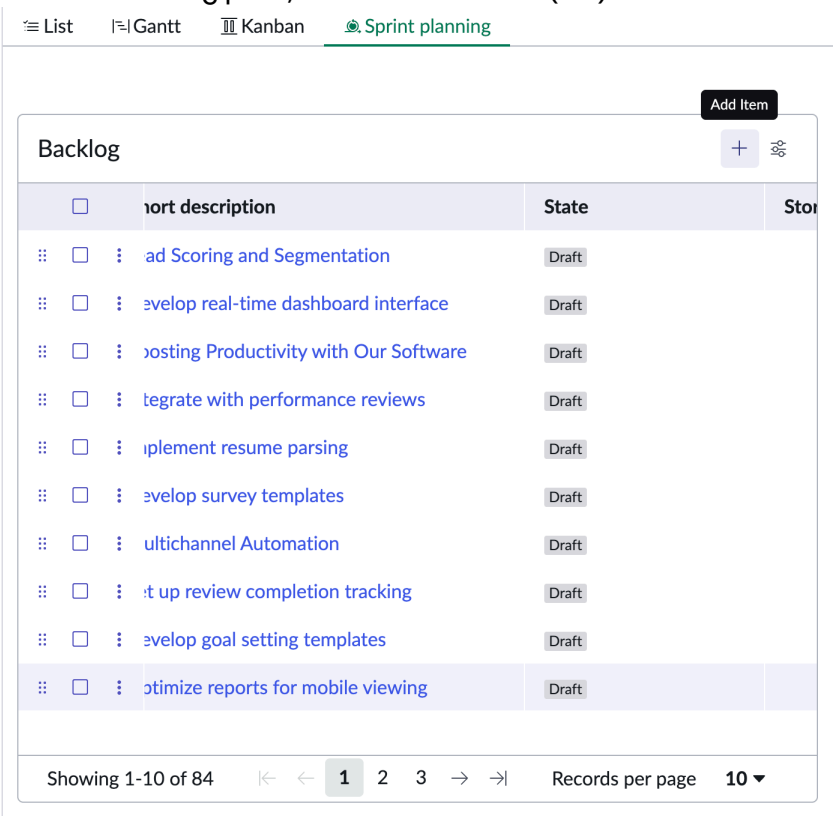
Create and add new work items to the Backlog directly from the Sprint planning view of Collaborative Work Management.

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Before you begin
Role required: sn_cwm.cwm_user

Procedure

1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From a Space, select a Board that you're performing sprint planning for.
3. Select the **Sprint planning** tab.
4. From the Backlog pane, select the Add item (+) icon.



5. Select the work item type from the **Item type** drop-down list.
   The default work item type available is Task. You can enable other types such as Story or create a custom type. See Create and manage custom work item types in CWM.
6. On the form, fill in the details for the item such as short description, start and end dates, story points, and others.
7. Select **Submit**.

Result
The newly created work item is added to the Backlog.

What to do next
You can plan this item into one of the active sprints by dragging and dropping it into the Sprint section. See Plan work items into sprints in CWM.

Create a sprint in CWM

Create a sprint with custom duration and capacity to enable your team to plan and execute their work in an Agile methodology in Collaborative Work Management.

Before you begin
Role required: sn_cwm.cwm_user

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Procedure

1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From a Space, select a Board that you're performing sprint planning for.
3. Select the Sprint planning tab.
4. If there are no sprints in your CWM Board, you can use the **Plan a Sprint** form in the Sprints section.
5. If there are existing sprints, choose an option to create a new sprint.

What to do next

Plan work items into sprints in CWM.

Update sprint details in CWM

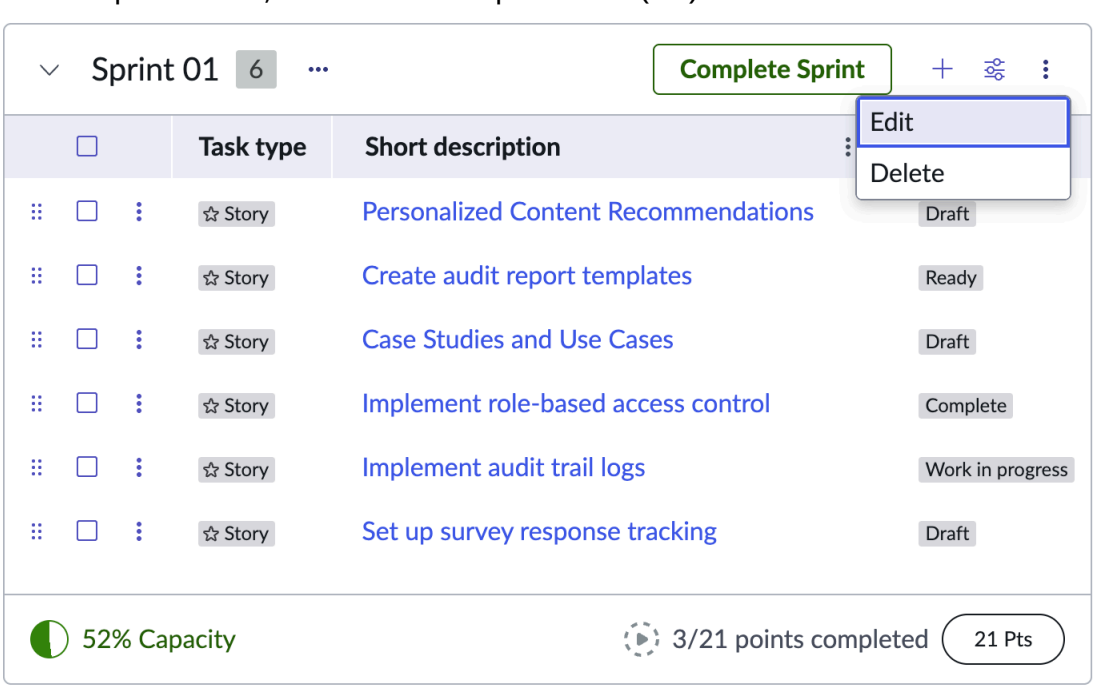
Modify the duration, capacity, and dates for a sprint in Collaborative Work Management.

Before you begin

Role required: sn_cwm.cwm_user

Procedure

1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From a Space, select a Board that you're performing sprint planning for.
3. Select the Sprint planning tab.
4. From the sprint header, select the More options icon ( ) and select **Edit**.



5. Make the necessary edits to the sprint details.
6. Select **Save**.

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Related topics

- Plan work items into sprints in CWM
- Create work items for sprints in CWM
- Delete a sprint in CWM

Delete a sprint in CWM

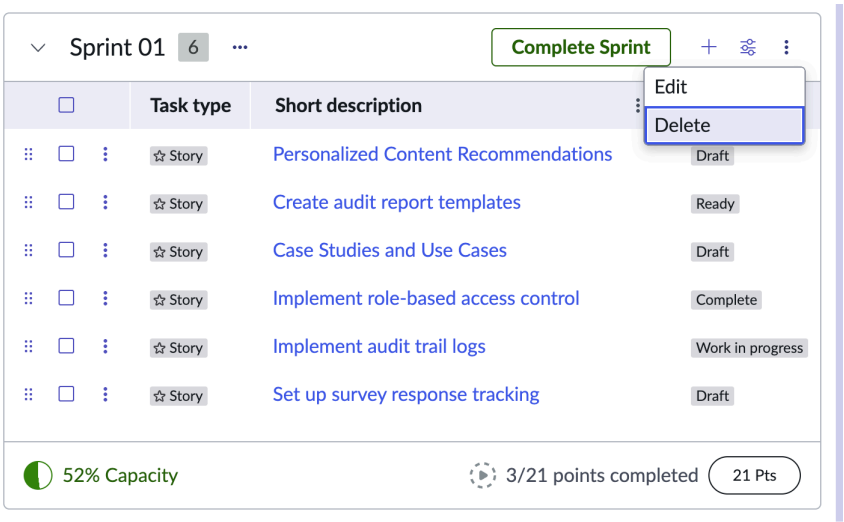
Delete individual sprints from Sprint planning in Collaborative Work Management so that your Board reflects the changes in your planning priorities.

Before you begin

Role required: sn_cwm.cwm_user

Procedure

1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From a Space, select a Board that you're performing sprint planning for.
3. Select the Sprint planning tab.
4. From the sprint header, select the More options icon ( ) and select **Delete**.



5. In the Delete Sprint confirmation modal, select **Delete**.

Result

The sprint is deleted and any active incomplete work items that were scheduled into this sprint are moved to the backlog.

Create work items for sprints in CWM

Create and add new work items to a sprint directly from the Sprint planning view of Collaborative Work Management.

Before you begin

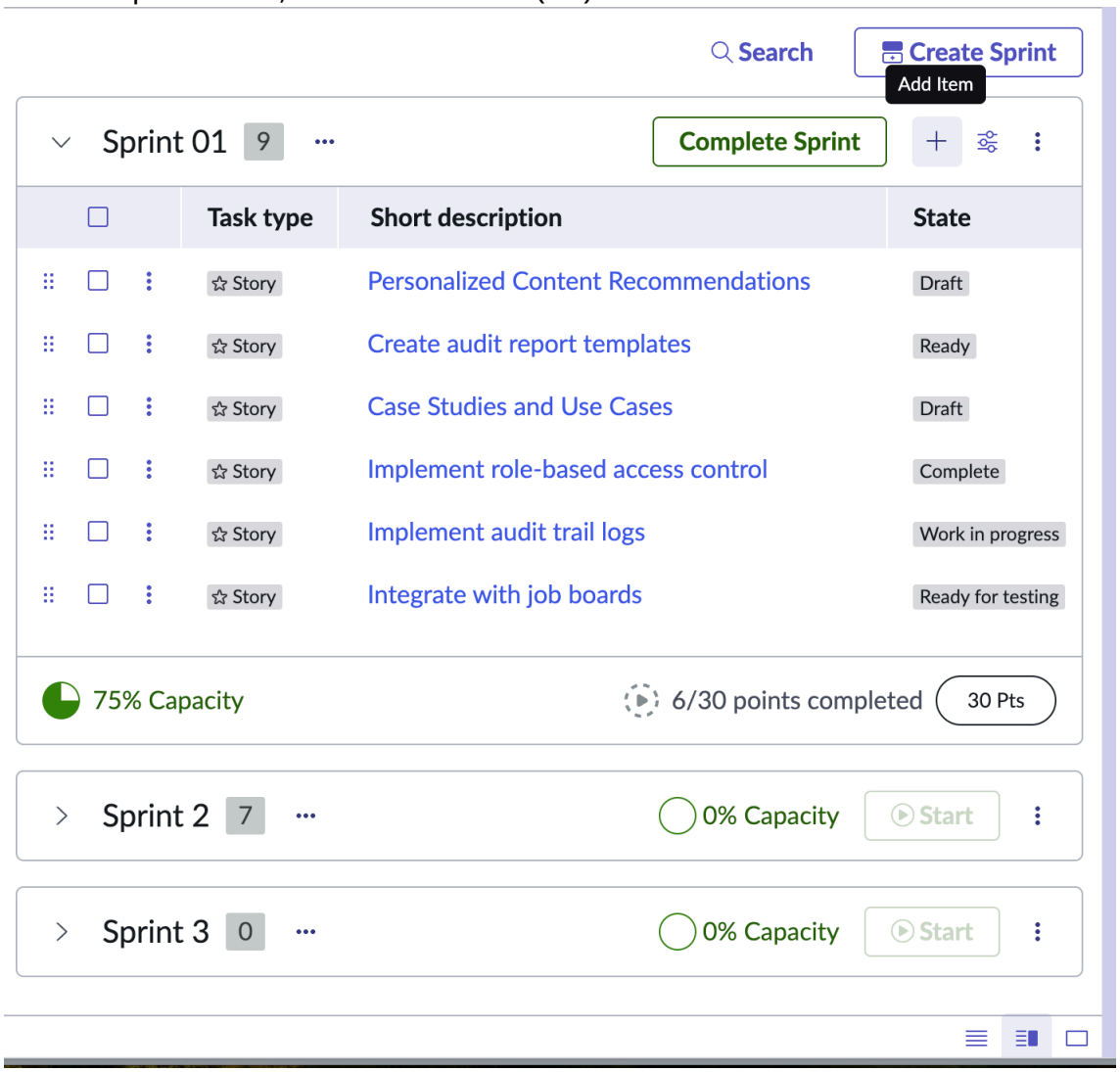
Role required: sn_cwm.cwm_user

Procedure

1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From a Space, select a Board that you're performing sprint planning for.

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3. Select the Sprint planning tab.
4. From the sprint header, select the Add item (+) icon.



5. Select the work item type from the **Item type** drop-down list.
   The default work item type available is Task. You can enable other types such as Story or create a custom type. See Create and manage custom work item types in CWM.
6. On the form, fill in the details for the item such as short description, start and end dates, story points, and others.
7. Select **Submit**.

Plan work items into sprints in CWM

Schedule stories and other CWM tasks from the backlog into sprints or move work across sprints in Collaborative Work Management.

Before you begin

Role required: admin

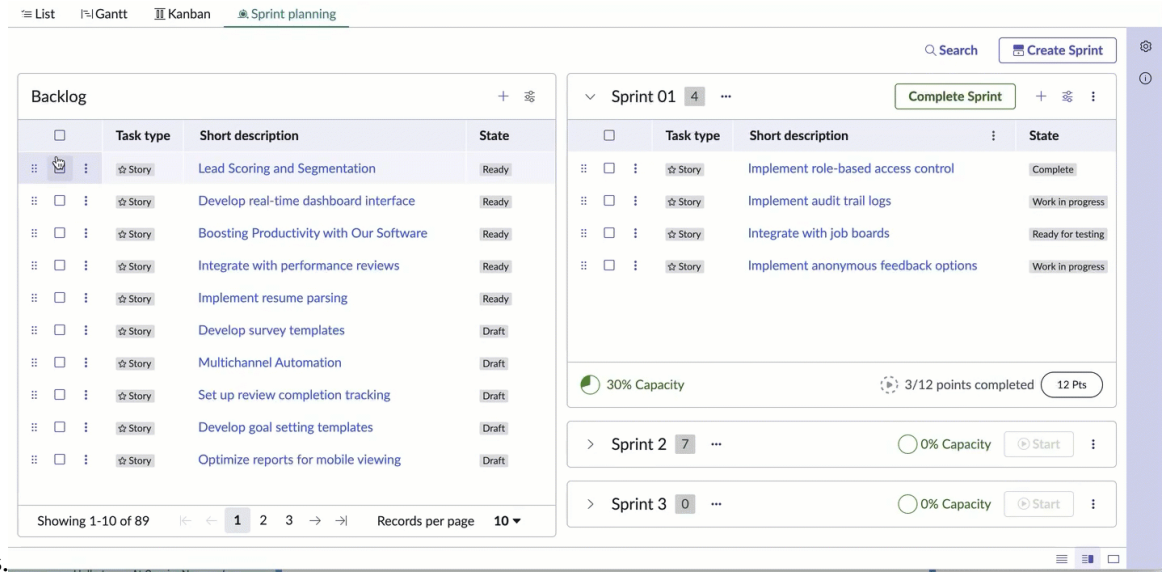
Procedure

1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From a Space, select a Board that you're performing sprint planning for.

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3. Select the Sprint planning tab.
4. From the Backlog, select the work items that you'd like to schedule into a sprint.
5. Drag and drop them into the sprint of your choice.
   You can drag and drop the work items into sprints even when the sprint sections are collapsed.
6. To move the work items from one sprint to another, select them and drop them in the sprint of your choice.

   Here's a gif showing the drag and drop action between the backlog and sprint sections, and across sprints.



Related topics

- Start or complete a sprint in CWM
- Create work items for sprints in CWM
- Update sprint details in CWM

Start or complete a sprint in CWM

Start a sprint so that your team can start work on the planned items. After your team finishes the assigned work, you can mark this sprint complete, all directly from the Sprint planning view in Collaborative Work Management.

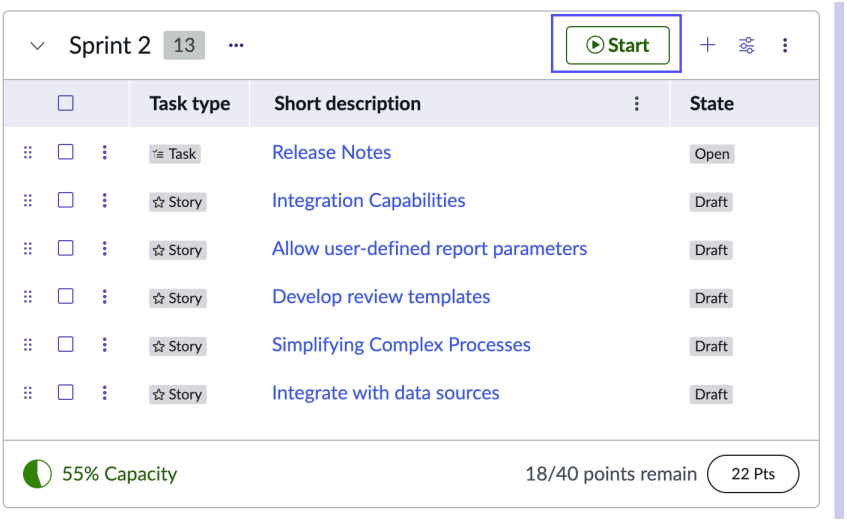
Before you begin

Role required: sn_cwm.cwm_user

Procedure

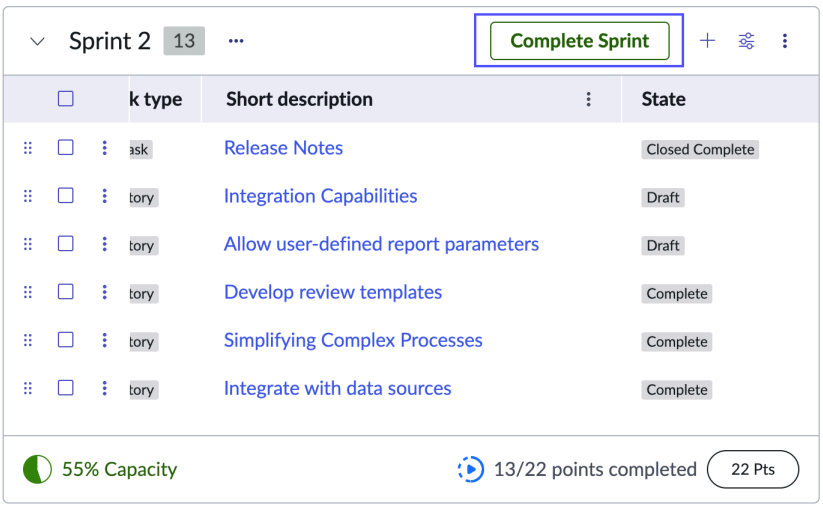
1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From a Space, select a Board that you're performing sprint planning for.
3. Select the Sprint planning tab.
4. To start a sprint, select **Start** from the sprint header.

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5. Complete a sprint.

a. From the sprint header, select **Complete Sprint**.



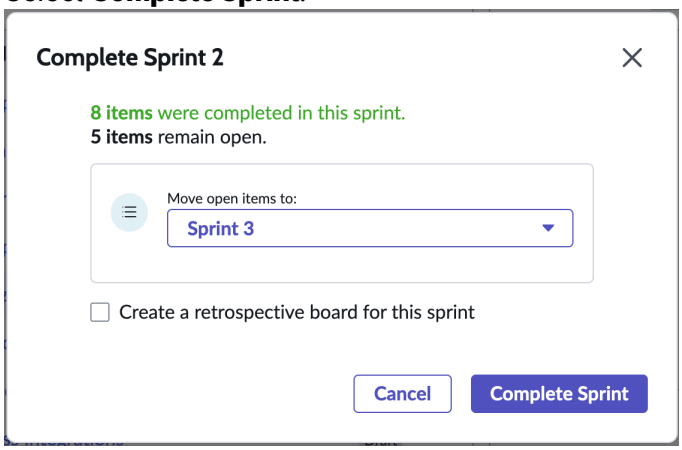
b. Review the details of completed and open items for this sprint.

c. Move the incomplete items to the next sprint or the backlog.

d. Choose to create a retrospective Board for this sprint to perform a sprint retrospective with your team.
For more info, see Create a retrospective board for a sprint in CWM.

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e. Select **Complete Sprint**.



The sprint is marked as complete and is no longer displayed on the Sprint planning view anymore. All the open items are moved into the next sprint or to the backlog based on your selection.

Create a retrospective board for a sprint in CWM

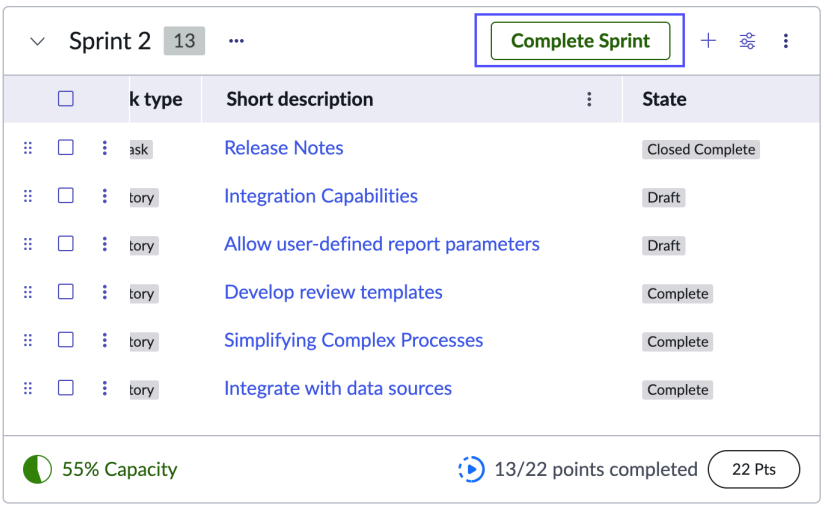
When marking a sprint complete, choose to create a sprint retrospective board for your team to collaborate and reflect on the recent sprint in Collaborative Work Management.

Before you begin

Role required: sn_cwm.cwm_user

Procedure

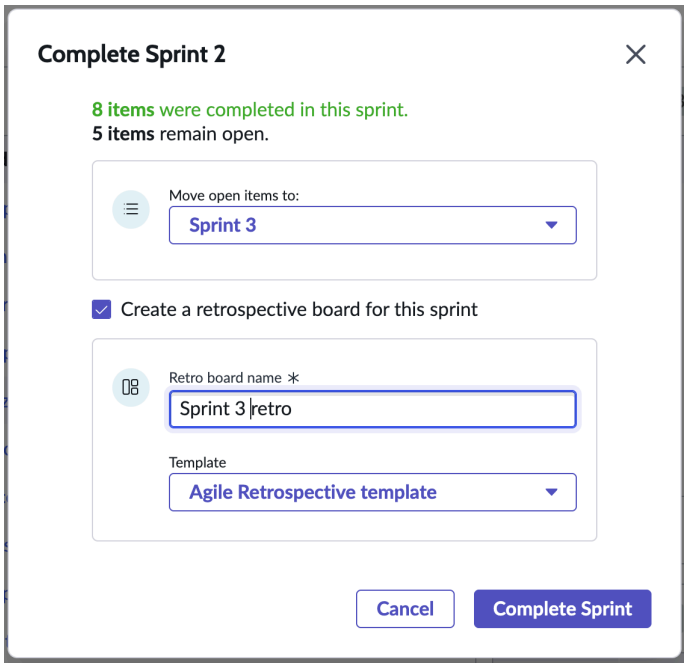
1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From a Space, select a Board that you're performing sprint planning for.
3. Select the Sprint planning tab.
4. From the sprint header, select **Complete Sprint**.



5. Review the details of completed and open items for this sprint.
6. Move the incomplete items to the next sprint or the backlog.
7. Select the option create a retrospective Board for this sprint.
8. Provide a name for your Board.

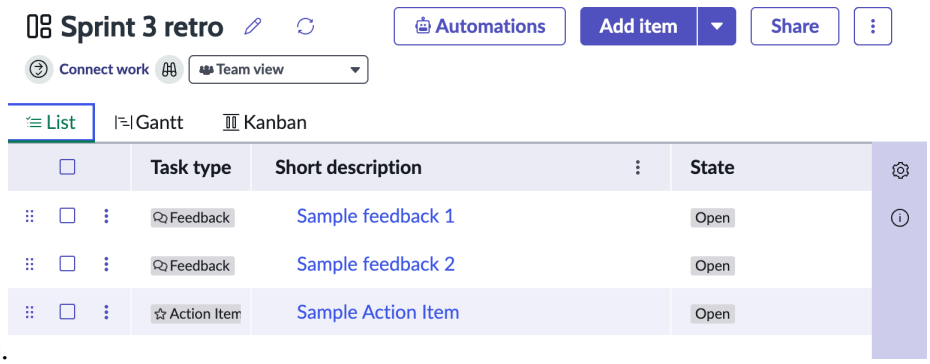
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9. Select a template to apply to this Board.
   By default, the Agile Retrospective template is applied. If you want to create a different template depending on your requirements, see Templates in CWM for Boards and Docs.



10. Select **Complete Sprint**.

Result
A new retrospective Board is created for the sprint that is just marked complete within the same Space. You can navigate to the new board from the success message or from the left navigation panel.



Collaborative documentation using CWM

Manage all kinds of documentation for work such as meeting notes, project requirements, or technical specifications using rich text Docs with real-time collaboration.

Overview of collaboration within Docs for CWM workspace. Approximately two minutes long.

Docs can be created within a Space, and organized into folders. Within a Space, you can create multiple Docs and within each Doc, you can create unlimited pages to help you effectively organize your information.

Docs features

The following are the key features of Docs:

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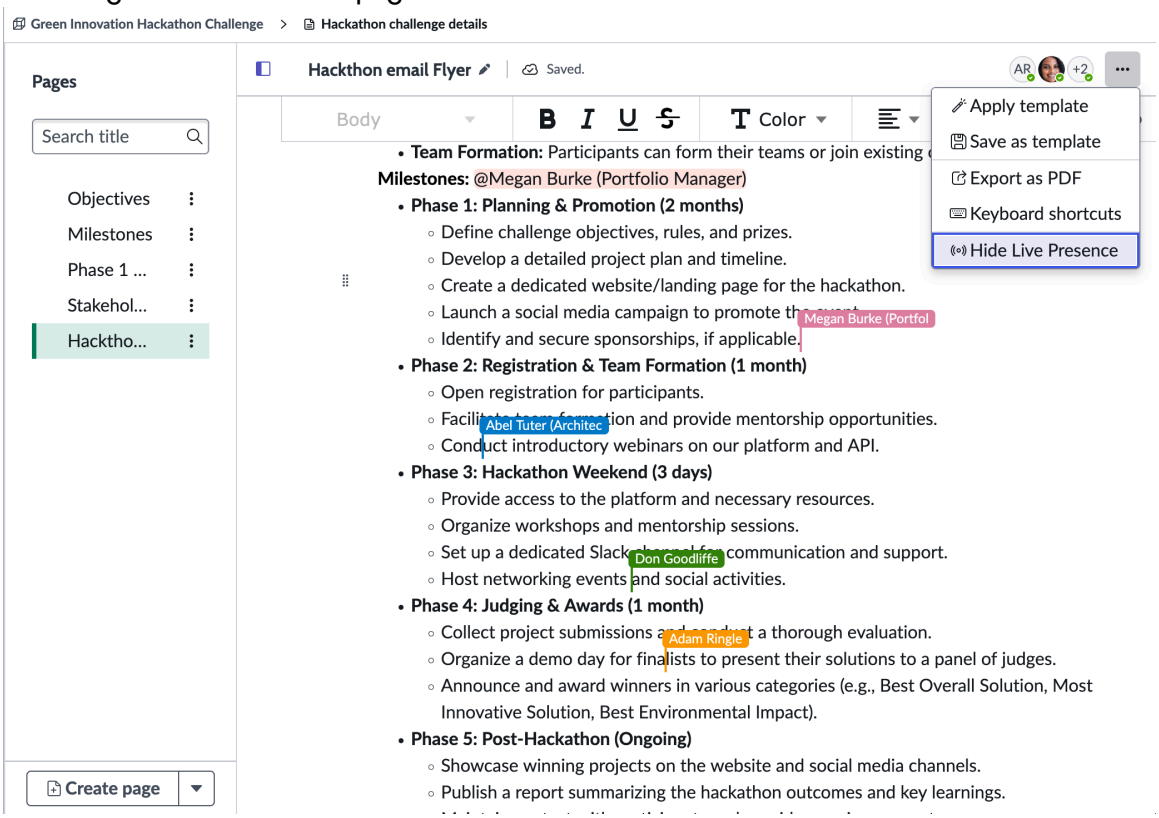
- Auto-save content.
- See who is viewing or working on a Doc using the feature of live user presence.
- Get notified when someone @-mentions you in a Doc.
- Create and apply templates for documents.
- Use rich text paragraph formatting, which includes headings, lists, alignment, and others.
- Move text blocks to change their placement using block-level editing.
- Tag team members inline or insert tables using the **/** command.
- Add reference to other ServiceNow AI Platform tables to connect work across teams.
- Insert images by uploading files or using web URLs.

Note:
The experience of inserting Google Images links might not work.

- Copy and paste the content such as text, images, lists, and tables from one Doc page to another.
- Email the Docs page content to your team members and stakeholders within and outside the CWM workspace.

Real-time collaboration within CWM Docs

With the feature of real-time collaboration, edit a Doc page concurrently with multiple other editors. Colored cursors denote the current location of each editor on the page. You can choose to show or hide these live presence indicators based on your preference while working on or reviewing the content of the page.



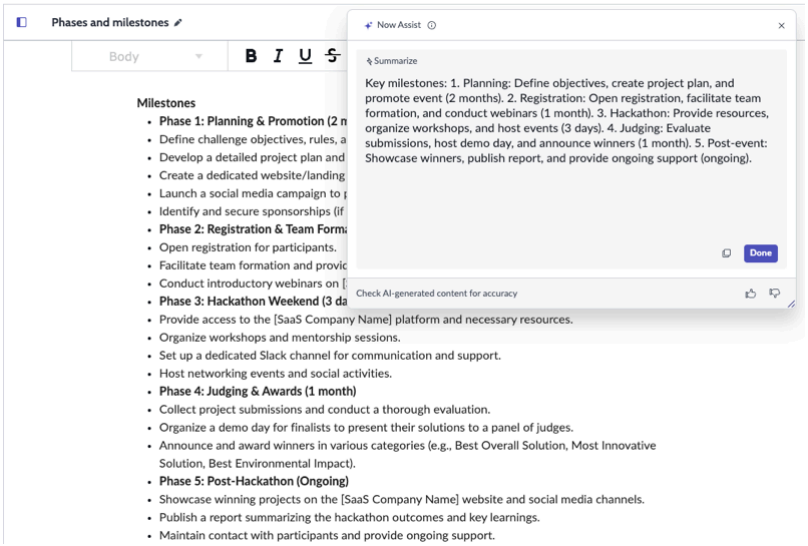
Note:
Application performance may degrade with a large number of concurrent editors.

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Summarize Docs content using Now Assist for CWM

Use Now Assist capabilities to elaborate, shorten, and summarize selected content in Docs, or to get a summary of the whole document.

- Summarize, elaborate, or shorten selected text.
- Summarize the entire content on the page.



Note:

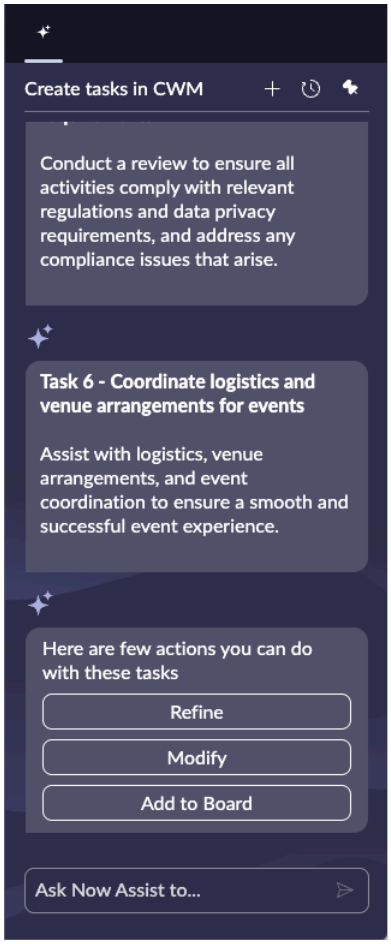
- Docs summarization in Collaborative Work Management is a Now Assist for CWM skill. For more information, see Configure Now Assist for Collaborative Work Management (CWM)
- If there is more content to summarize, you can exclude some content and retry.
- The summary is AI generated. So, it's recommended to review the text to ensure its accuracy.

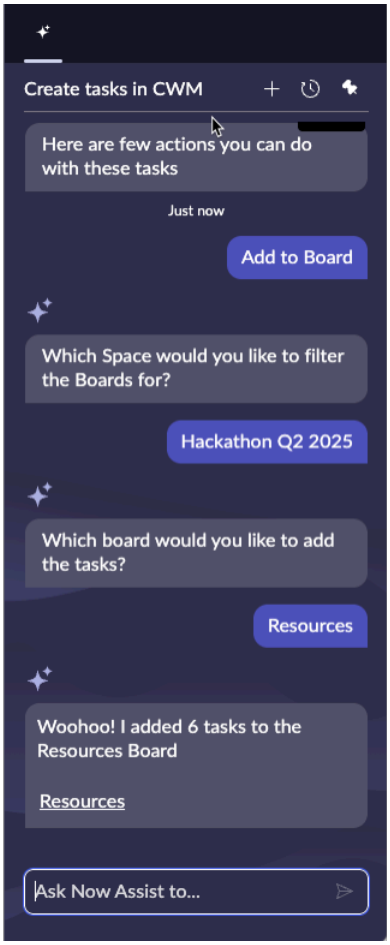
Generate tasks from Docs and add them to Board using Now Assist for CWM

Use the generative AI capabilities of Now Assist to create tasks from the context of your Docs and help you add them to the required Board in CWM workspace.

Note:
Tasks generation is a is a Now Assist for CWM skill. For more information, see Configure Now Assist for Collaborative Work Management (CWM)

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Create a Doc in CWM

Store information related to your tasks, reference users and task records, and collaborate in real-time using Docs in Collaborative Work Management workspace.

Before you begin

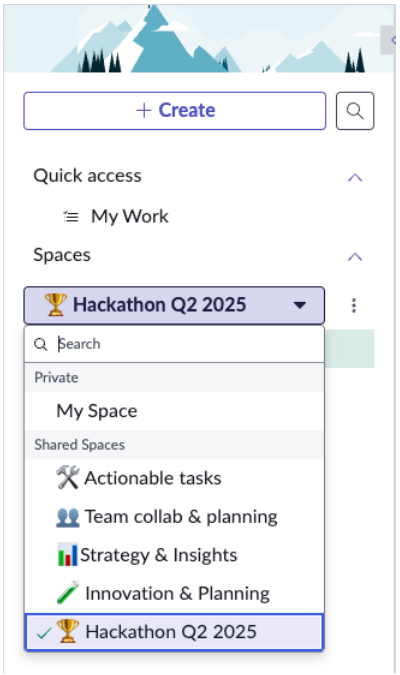
Create a Space in CWM.

Role required: sn_cwm.cwm_user

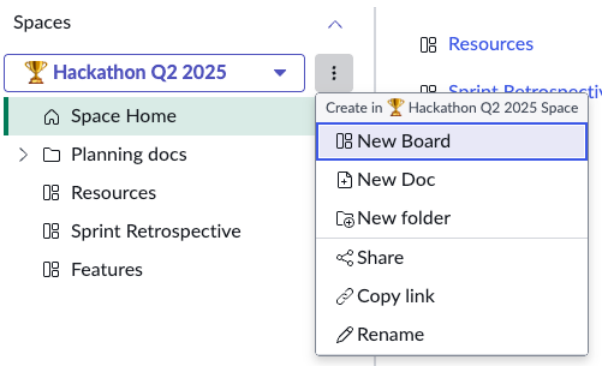
Procedure

1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. Open a Space that you want to create a document in.
3. From the Spaces menu, open a Space that you want to add a Board to.

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4. From the More options menu of the Space ( ), select **New Doc**



s

5. In the **Doc name** field, enter the name for the document.
   For example, **Meeting notes**.
6. Select **Create**.

Result

A new Doc is created for the current Space, and an untitled page is opened for you to start drafting your content.

What to do next

Utilize the rich-text formatting options of the Doc to draft information relevant for your team or type **/** to explore other options.

> **Note:**
> To reference ServiceNow AI Platform records other than CWM tasks, work with your admin to update the *sn_cwm.record_mention_config* system property. For more information, see Enable ServiceNow AI Platform records in CWM Docs.

Manage pages and subpages in CWM Docs

Flexibly organize information for your teams and work items by creating, duplicating, and deleting pages and subpages within a Doc in Collaborative Work Management (CWM) workspace.

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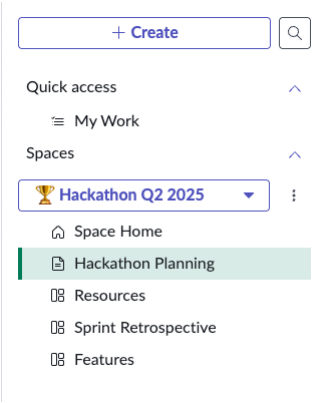
Before you begin

Create a Doc in CWM

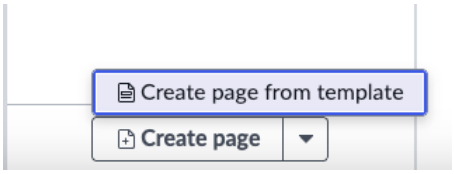
Role required: sn_cwm.cwm_user

Procedure

1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From the Spaces menu, navigate to the Space where your Doc is located and open it.

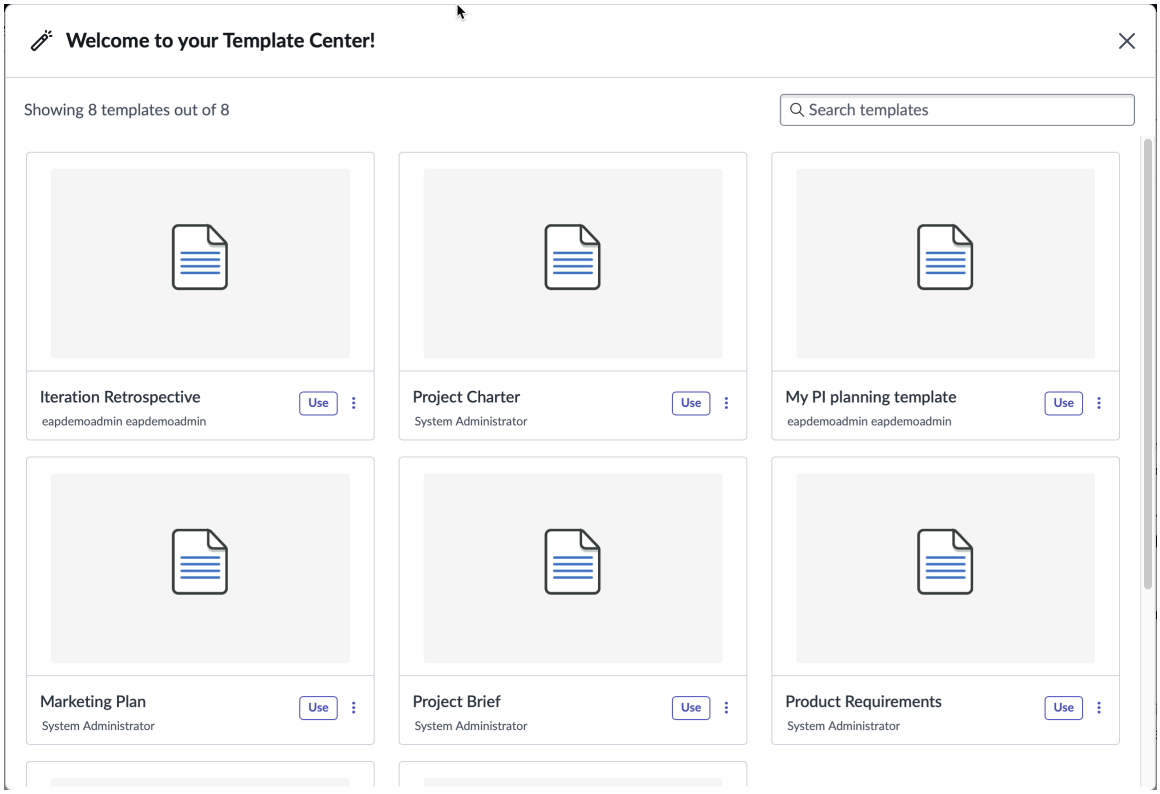


3. To create a page, you can create a blank page or start with a predefined template.
   - For a blank page, select **Create page**.
   - To create from templates:
     a. Select **Create Page from template**.



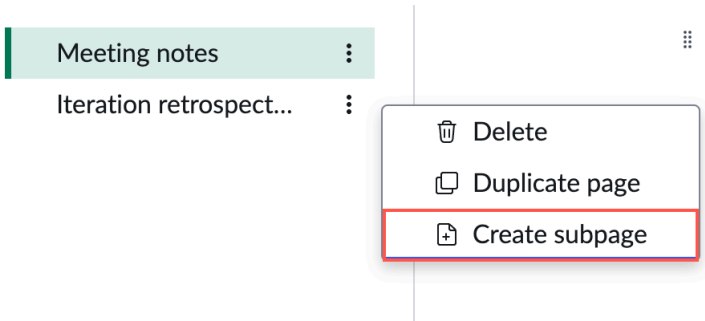
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b. From a template card that you want to use, select **Use**.



The new page is created and added to your Doc.

4. To create a subpage, select the **Page Actions** menu (⋮) and select **Create Subpage**.



5. To delete a page or a subpage, select the **Page Actions** menu (⋮) and select **Delete**.

Only a user with Editor or Owner access to the Space can delete Doc pages. If there's only one page left in the Doc, it can't be deleted by any user.

Duplicate a Doc in CWM

Save time by duplicate an existing Doc to copy all its pages and content without having to copy the information manually in the Collaborative Work Management workspace.

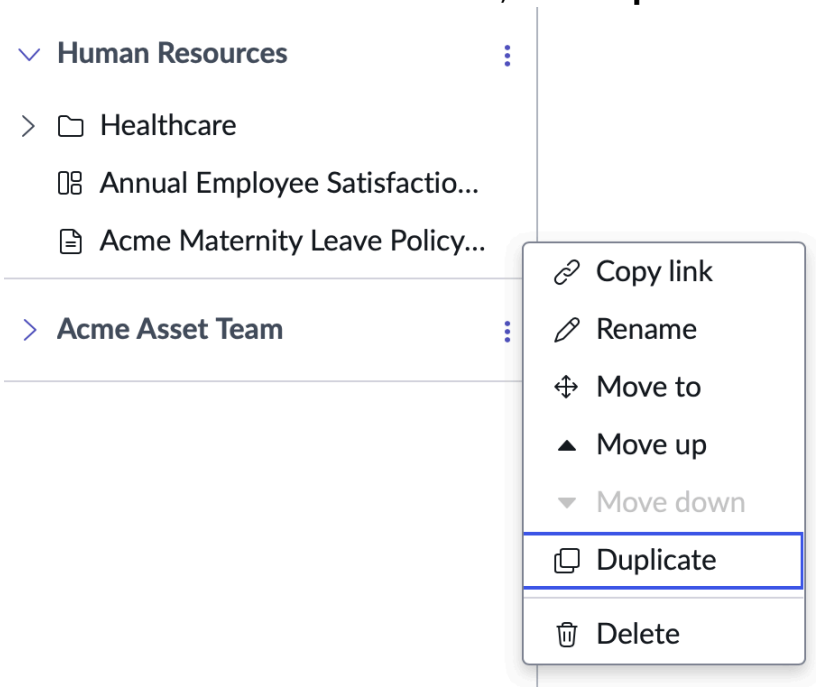
Before you begin
Create a Doc in CWM.

Role required: sn_cwm.cwm_user

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Procedure

1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. Navigate to the Space that your Doc is in.
3. From the **More actions** menu of the Doc, select **Duplicate**.



4. Provide a name for the new Doc in the **Doc name** field.
   The default name given is in the format of **(Copy) <Original Doc name>**.
5. Select **Duplicate**.

Result

The new Doc is added to the same Space as the original Doc. If necessary, you can move it to a different Space or a different position in the same Space.

Export a Doc in CWM to a PDF file

Use the Docs offline, and share with teams or stakeholders outside Collaborative Work Management (CWM) by exporting Docs as PDF.

Before you begin

Create a Doc in CWM

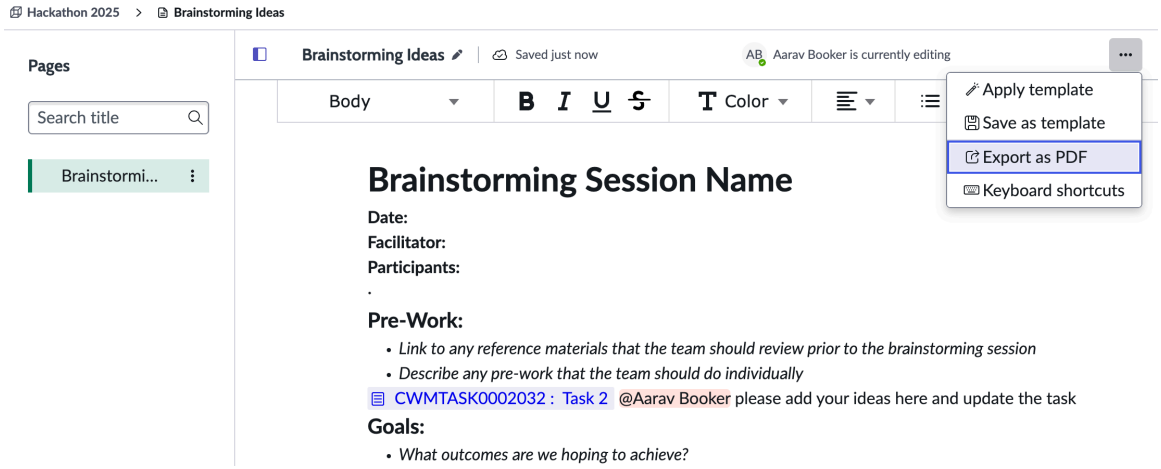
Role required: sn_cwm.cwm_user

Procedure

1. Navigate to **Workspaces** > *Collaborative Work Management*.
2. From a Space, select the Doc that you want to export.

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3. From the Doc header, select the More actions icon (•••), and then select **Export as PDF**.



Result
The Doc is exported and saved in your local system as a PDF file.

Templates in CWM for Boards and Docs

By enabling creation of Boards and Docs from predefined or custom templates, Collaborative Work Management (CWM) helps improve efficiency, save time, and reduce inconsistencies in format.

https://player.vimeo.com/video/1054556151?h=84dc648b21&badge=0&autopause=0&player_id=0&app_id=58479

Creating Boards and Docs from scratch across similar processes often consumes time and effort, and could also lead to differences in their structure. With templates in CWM, you get a predefined format for Boards and Docs, which you can use as-is or customize to suit your workflow. You can use templates for new Boards and Docs or apply them to existing ones. You can also save an existing Board or Doc in its current format as templates.

Template Center provides a centralized space where you can manage all templates for Boards and Docs. From the Template Center, you can:

- Explore predefined templates for Boards and Docs.
- Filter for available templates by Owner or Type.
- Search for templates using its title.
- View details for all available templates where you can see a preview of the Board or Doc format.
- Delete templates that you own.

Templates for Boards

When you use a template for a Board, any template tasks, custom columns, and shared columns that the template contains are applied to the Board. The Board data is displayed with all the custom columns available as part of the template.

Templates for Docs

When you use a template for a Doc, any template pages and content formatting is applied to the Doc.

To access templates, you can choose one of the following ways:

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- For creating a Board or Doc from template, use these options:
  - **Explore templates** from the main Create menu.
  - **Use templates** from the New Board or New Doc modal.
  - **Apply template** from the More actions menu or in the header of the Board or Doc.
- For saving a Board or Doc as a template: Use the **Save as template** option from the More actions menu or in the header of the Board or Doc.

The following sections help you get started with templates in CWM.

Create a Board or Doc from a template in CWM

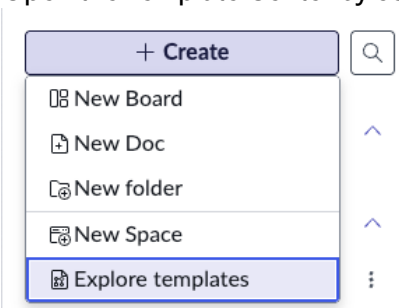
Create Boards or Docs using predefined or custom templates from the Template Center.

Before you begin

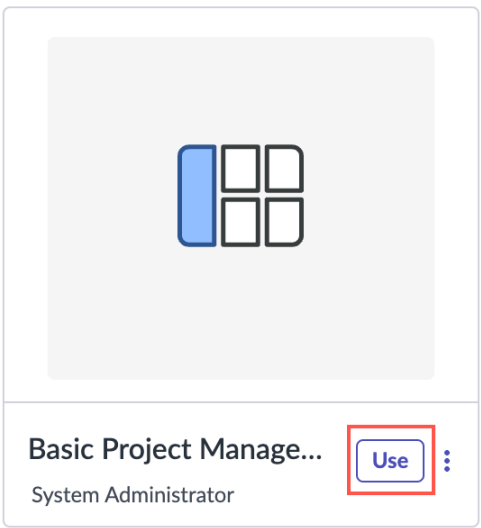
Role required: sn_cwm.cwm_user

Procedure

1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. Select **+Create**.
3. Open the Template Center by selecting **Explore templates**.



4. Locate the template that you want to use.
   - Filter the available templates by Owner or Type
   - Search for the template using its title or keyword.
5. From the template card that you want to apply, select **Use**.



6. Enter the Board or Doc name.

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7. Select the Space that you want to create this Board or Doc in.
8. Select **Save**.

Result

The Board or Doc is created in the Space that you selected.

- For a Board, any template tasks and custom columns that the template contains are applied to the Board. To learn more about Board views, see Board views in CWM.
- For a Doc, any template pages and content formatting is applied to the Doc.

Apply a template to existing Board or Doc in CWM

Apply predefined or custom templates to existing Boards or Docs in Collaborative Work Management workspace so that you can avoid inconsistencies in structure and format across your processes.

Before you begin

- Create a Board in CWM
- Create a Doc in CWM

Role required: sn_cwm.cwm_user

Procedure

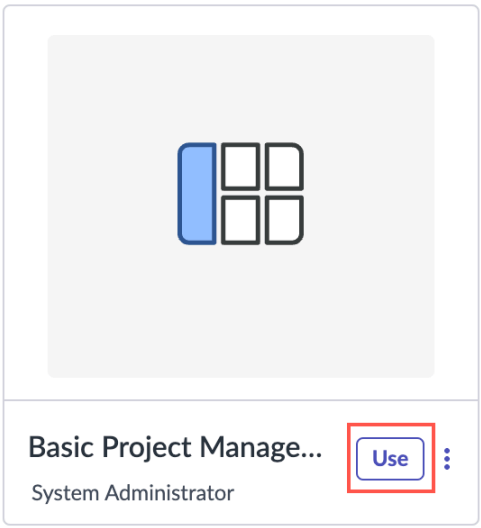
1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. Open the Board or Doc that you want to apply a template to.
3. You can apply template to a Board, Doc, or a single page in a Doc.

4. Locate the template that you want to use.
   - Filter the available templates by Owner. The Type filter is automatically set based on your choice in the earlier steps.
   - Search for the template using its title.
5. **Optional:** Check the details of the template by selecting **View details** from the Template actions menu (⋮).
   For a Board template, you can view the details of the number of Board views and custom task types that you get if you apply this template. You can also review the information on which of the List, Gantt, Kanban, and Sprint planning views are enabled in this template.

   (Optional) Only those custom columns that are part of these views are brought over when you apply this template.

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6. From the template card that you want to apply, select **Use**.



Result
The selected template is applied to your Board, Doc, or page and the data is displayed according to the template.

Save a CWM Board or Doc as a template

Save a Board or Doc, which you created or personalized, as a template so that you can reuse the same structure and format for other Boards and Docs in the future.

Before you begin

- Create a Board in CWM
- Create a Doc in CWM

Role required: sn_cwm.cwm_user

Procedure

1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. Open the Board or Doc that you want to save as a template.
3. You can save a Board, a Doc, or a single Doc page as a template.
4. Enter a name and description for the template.
5. From the Share with selection, select the access level for the template.
6. From the Board Views to Save selection, choose to include all shared views or just the current view of the Board.
7. Review the number of Board views and custom task types that will be included into this template.
8. Select **Save**.

Result
The saved template is added to the Template Center.

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Update a template in CWM

Update sharing permissions for a Board template or edit the format of a Doc template using the Template Center in Collaborative Work Management (CWM).

Before you begin

Role required: sn_cwm.cwm_user

You must be the owner of the template to update its details.

About this task

Updating Board templates

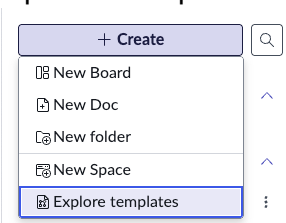
You can only modify the sharing permissions, template name, and the description of a Board template. The tasks, column order, sorting, custom columns, or any other preferences within the template can't be updated.

Updating Doc templates

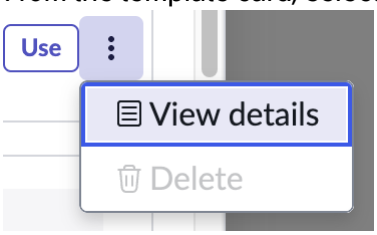
You can modify sharing permissions along with the format, structure, and pages for a Doc template.

Procedure

1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. Select **+Create**.
3. Open the Template Center by selecting **Explore templates**.



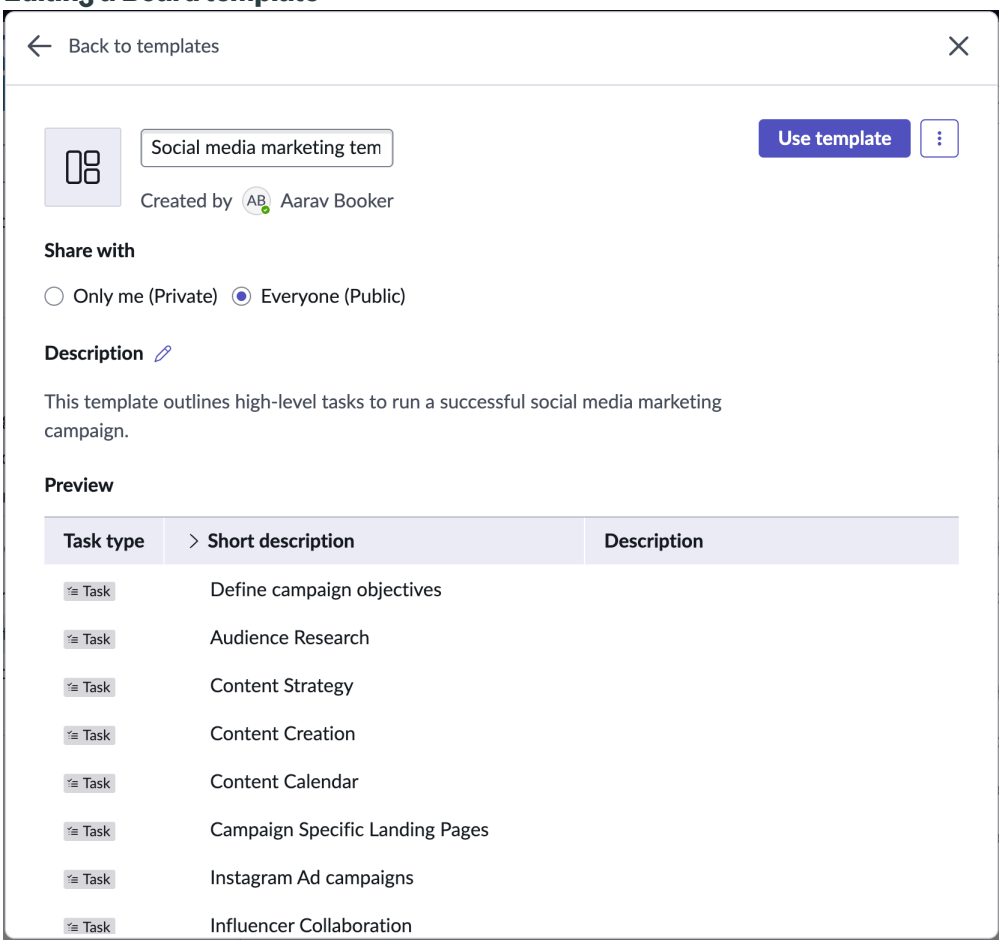
4. Locate the template that you want to edit.
   - Filter the available templates by Owner or Type
   - Search for the template using its title or keyword.
5. From the template card, select the Template actions menu (⋮) and select **View details**.



6. Modify the template title, the **Share with** access, or the description.

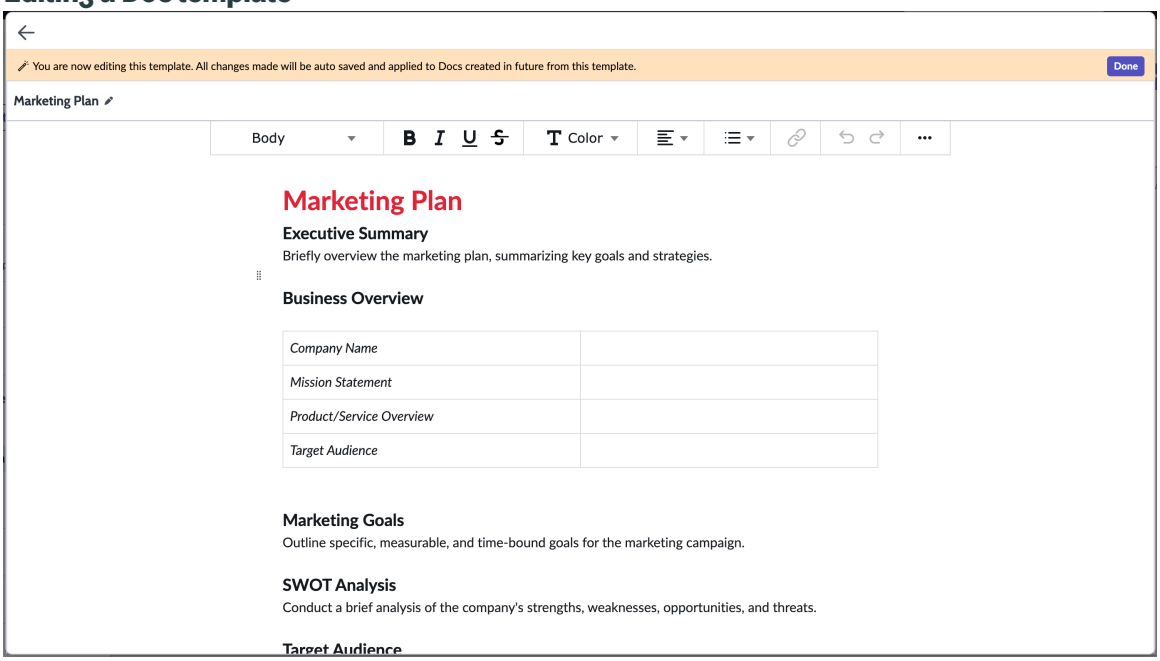
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Editing a Board template



7. For a Doc template, select **Edit** to edit the content of the template.

Editing a Doc template



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8. After making your changes, select **Done** to close the template editor.
   The changes are automatically saved to the template and they are applied to any Docs that you create from this template in the future.

Delete a Board or Doc template in CWM

Delete any custom templates that are no longer necessary for your workflows using the Template Center in Collaborative Work Management (CWM).

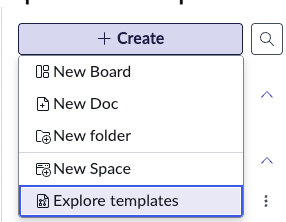
Before you begin

Role required: sn_cwm.cwm_user

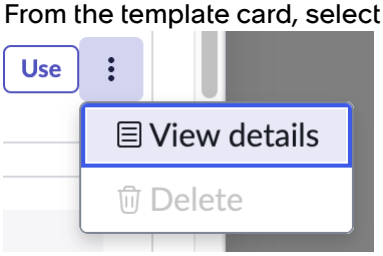
You must be the owner of the template to delete it.

Procedure

1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. Select **+Create**.
3. Open the Template Center by selecting **Explore templates**.



4. Locate the template that you want to use.
   - Filter the available templates by Owner or Type
   - Search for the template using its title or keyword.
5. From the template card, select the Template actions (⋮) menu and select **Delete**.



6. Select **Delete** to confirm.

Result

The template is deleted and is no longer available for you or your team to use.

Collaborative Work Management reference

Reference topics provide details on the roles, tables, and properties installed with Collaborative Work Management (CWM).

Components installed with Collaborative Work Management

Several types of components are installed with activation of the Collaborative Work Management application, including tables and user roles.

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Roles installed

Role title [name]	Description	Contains roles
CWM user [sn_cwm.cwm_user]	The basic role required to access the CWM workspace.	None

Tables installed

Table	Description
CWM Automation [sn_cwm_automation]	Stores data of automation conditions for Boards.
CWM Board [sn_cwm_board]	Contains all tasks, views, and column configuration.
CWM Column Choice [sn_cwm_col_choice]	Stores data for choices and labels created for custom columns.
CWM Column Usage [sn_cwm_columns_usage]	Stores usage of custom columns and its type.
CWM Document [sn_cwm_doc]	Stores the information of all Docs created within CWM.
CWM Document page [sn_cwm_doc_page]	Stores the information of pages and subpages created for a Doc within CWM.
CWM Document relationship [sn_cwm_doc_m2m]	Stores relation between Docs and Doc pages
CWM Menu Items [sn_cwm_menu_item]	Stores the content hierarchy for Boards, Docs, and folders within a Space.
CWM Notification Digest [sn_cwm_notification_digest]	Stores information of notifications sent to CWM users.

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Table	Description
CWM Permission [sn_cwm_permission]	Stores different level of permissions for the users and groups for the Spaces.
CWM Space [sn_cwm_space]	Stores information of all CWM Spaces.
CWM Space Access Request [sn_cwm_space_access_request]	Stores the list of users who requested access to the Space.
CWM Task [sn_cwm_task]	Stores tasks data.
CWM Template [sn_cwm_template]	Stores information of Board and Doc templates within CWM workspace.
CWM Template Board Metadata [sn_cwm_template_board_metadata]	Stores metadata of CWM Board templates such as work types, automations, and others.
CWM Template Board Views [sn_cwm_template_board_view]	Stores information of views within Board templates.
CWM Template Column Choice [sn_cwm_template_column_choice]	Stores information of column choices within Board templates.
CWM Template Custom Column Label [sn_cwm_template_custom_column_label]	Stores information of custom column labels within Board templates.
CWM Template Document Page [sn_cwm_template_doc_page]	Stores information of pages within Doc templates.
CWM Template Task [sn_cwm_template_task]	Stores information of tasks within Board templates.
CWM View Preferences [sn_cwm_view_preference]	Stores information of view preferences for Boards.
CWM Views	Stores information of all Board views within CWM.

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Table	Description
sn_cwm_view	
CWM Work Type [sn_cwm_work_type]	Stores work types for task allowed within a Space.

Properties installed with Collaborative Work Management

System properties that you can configure to include other ServiceNow AI Platform records in CWM Docs and modify the way non-CWM users request access to the workspace.

These properties are available for Collaborative Work Management.

Note:
To open the System Properties [sys_properties] table, enter `sys_properties.list` in the navigation filter.

Properties for Collaborative Work Management

Property	Description
sn_cwm.request_role_access	Property to show or hide the **Request Access** button for non-CWM users in the workspace. By default, the button is hidden. When this property is set to true, an event *sn_cwm.REQUEST_ROLE_ACCESS* is raised. Admins can configure this event to trigger one of the following workflows, allowing the non-CWM user to request access to the workspace. • Raising a Service Catalog request. • Sending an email. • Type: true | false • Default value: false • Location: System Property [sys_properties] table
sn_cwm.record_mention_config	Property to configure mentioning any ServiceNow AI Platform record within Docs pages of CWM workspace. • Type: string • Default value: `[{"sourceTable":"sn_cwm_task","label":"CWM Task","fields":["short_description","number"]}]` By default, this property is configured to include CWM task records. • Location: System Property [sys_properties] table To include any other ServiceNow AI Platform record, update the property.

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Properties for Collaborative Work Management (continued)

Property	Description
	For example, to reference the Incident records in the Docs pages, update the **Value** field of this property to include the Incident table. The updated **Value** field would include the configuration for CWM task records and Incident records: `[{"sourceTable":"sn_cwm_task","label":"CWM Task","fields":["short_description","number"]},{"sourceTable":"incident","label":"Incident","fields":["short_description","number"]}]`
sn_cwm.connect_work_import_limit	Property to configure the maximum number of items that can be imported to a CWM Board for the first time when using the Connected work feature. • Type: integer • Default value: 100 • Location: System Property [sys_properties] table
sn_cwm.agile_enabled	Property to control Agile-related features for CWM. If set to true, then agile items like Story and Epic can be created in a CWM Board and Sprint planning feature will be enabled. • Type: true | false • Default value: true • Location: System Property [sys_properties] table

Grouping of tasks in status reports of CWM My Work

Learn how various tasks such as CWM Tasks, Agile Stories, Project Tasks and others are grouped based on their State and Priority in My Work reports of Collaborative Work Management (CWM).

State buckets in My Work for different task types

My Work state buckets	CWM & Project Workspace	Scrum tasks	Agile/ Story	Demand Tasks	Demand Workbench	Risks(statu	Decision(s	Demand Tasks2
Open	• Pending • Open	• Draft • Blocked • Ready	• Draft • Ready	• Pending • Open	• Draft • Submitted	Pending	Pending	Pending

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State buckets in My Work for different task types (continued)

My Work state buckets	CWM & Project Workspace	Scrum tasks	Agile/ Story	Demand Tasks	Demand Workbench	Risks(statu	Decision(s	Demand Tasks2
Work in Progress	Work in Progress	Work in Progress	• Work in progress • Ready for testing • Testing • Ready for acceptance"	Work in Progress	Screening			Work in Progress
Closed	• Closed Complete • Closed Incomplete • Closed Skipped	• Complete • Cancelled	• Accepted • Complete • Cancelled	• Closed Complete • Closed Incomplete • Closed Skipped	• Qualified • Incomplete • Deferred • Rejected	• Achieved • Not Achieved • Avoid • Mitigate • Transfer • Accept	• Approved • Rejected	• Closed • Complete • Closed Incomplete • Closed Skipped

Priority buckets in My Work for different task types

My Work Priority Buckets	CWM & Project Workspace	Scrum tasks	Agile Story	Demand Tasks	Demand Workbench	Risks	Decision	Demand Tasks
Critical	Critical	Critical	Critical	Critical	Critical	Absolute	Critical	Critical
High	High	High	High	High	High	High	High	High
Moderate	Moderate	Moderate	Moderate	Moderate	Moderate	Moderate	Moderate	Moderate
Low	Low	Low	Low	Low	Low	Low	Low	Low
Planning	Planning	Planning	Planning	Planning	Planning	NA	Planning	Planning

Related topics

My Work in CWM

Now Assist for Collaborative Work Management (CWM)

The Now Assist for CWM application uses generative AI skills to improve time to value for the tasks you perform in the CWM workspace.

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Get started

Explore  Learn the features and key benefits	Configure  Set up the implementation
Use  Start using generative AI capabilities in CWM	Reference  Learn about roles, tables, and system properties

Important:

- Not all model providers are available for customers with in-country SKUs, and some Now Assist products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some Now Assist products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some Now Assist products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Further, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

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Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. In addition, this application will collect task data (for Case Assist) and chat transcripts (for Chat Assist). Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

For more information, see the Now Assist documentation.

Exploring Now Assist for Collaborative Work Management (CWM)

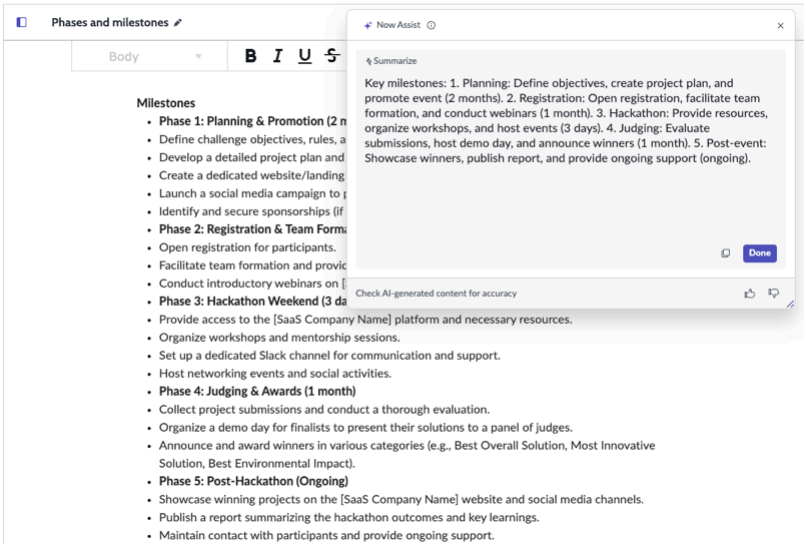
Learn more about the generative AI capabilities of Now Assist for CWM and how they can help you save time and improve efficiency for the actions your team performs within the CWM workspace.

Skills

Docs summarization in Collaborative Work Management

Gain insights into the contents of the page by summarizing it in CWM Docs. Whether you're reviewing long documents or preparing for meetings, Doc summarization skill helps you stay informed and efficient.

With the Doc summarization skill, you can also elaborate and shorten content, resulting in improved content quality in the CWM Doc pages. Quickly shorten lengthy paragraphs, paraphrase bullet points, or expand on key points ensuring that your content is tailored to specific needs.



Task generation in Collaborative Work Management

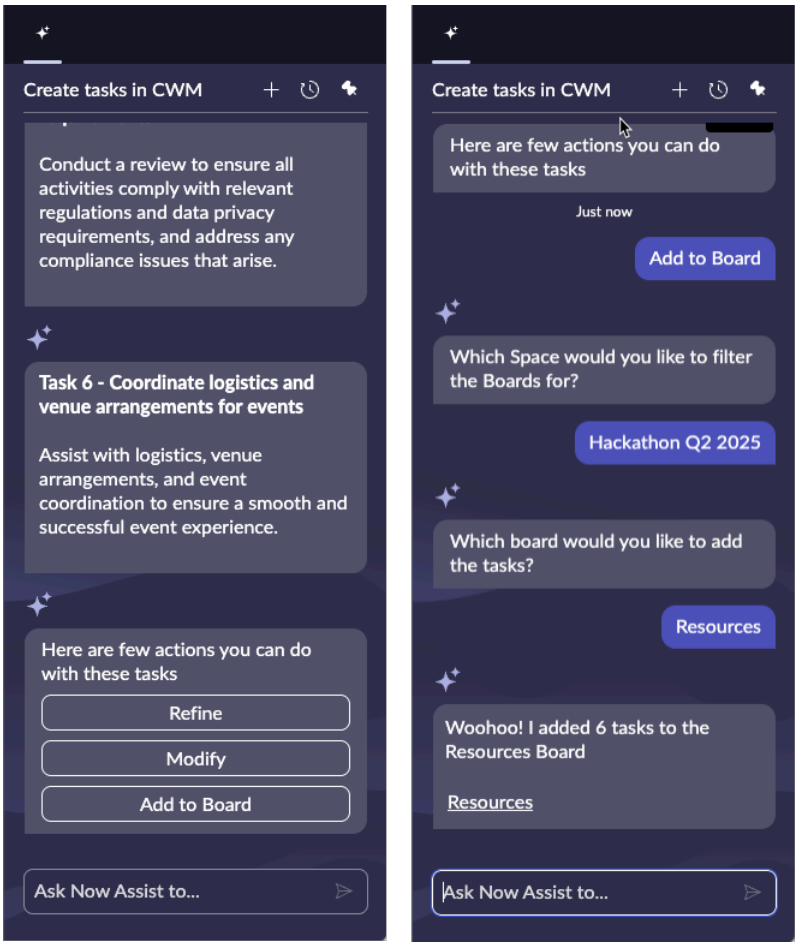
Creating tasks with detailed descriptions for your CWM Board requires significant time and manual effort. If the tasks aren't detailed enough, it can lead to confusion and misalignment within the team, affecting their understanding of the expected outcomes. To avoid this manual effort and improve time to value, Now Assist can generate tasks for your Board using the information in your Docs. This way, you can ensure clear and comprehensive task descriptions, allowing you to focus more on execution and less on the administrative work.

Based on the recommendations, you can ask Now Assist to perform one of the following:

- Generate task according to its original recommendations.
- Split a task recommendation into multiple tasks.

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- Combine multiple task recommendations into one task.
- Remove any task recommendation.



Thus, by using the Task generation skill within CWM, you can:

- Remove initial roadblocks to create tasks for a CWM Board.
- Save time and increase productivity by automating the task creation process.

You can use Now LLM Service, Now LLM Long Term Stable models (LTS), Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all Now Assist skills and AI agents. Use the Configuration Controls in to define which options are available, then set the skill-level preferences in the Now Assist Admin console. For more information, see .

Now Assist Admin console

An administrator can activate and manage Now Assist features and skills for the CWM workspace using the Now Assist Admin console. For more information, see Now Assist Admin console.

Now Assist panel in CWM workspace

A knowledge worker can use the Now Assist panel in CWM workspace. This conversational interface enables the user to generate CWM tasks from the context of a Doc page. For more information about the Now Assist panel, see Now Assist panel.

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What to explore next

To learn more about configuring and using Now Assist for CWM, see:

- Configure Now Assist for Collaborative Work Management (CWM)
- Generate tasks from Docs in Collaborative Work Management (CWM)
- Now Assist for Collaborative Work Management (CWM) reference

Supporting information for Now Assist for Collaborative Work Management (CWM)

Learn about supported versions, user interfaces, and application dependencies of Now Assist for CWM.

Compatible versions

The Now Assist for CWM application is compatible with Yokohama Patch 3 release and later.

Supported user interfaces

The Now Assist for CWM application is supported for Collaborative Work Management version 6.0.0 and later.

Application information

Installing the latest Now Assist for Collaborative Work Management (CWM) store app (sn_cwm_ai) also installs Now Assist for Platform (sn_genai_platform).

Related topics

Configure Now Assist for Collaborative Work Management (CWM)

Configure Now Assist for Collaborative Work Management (CWM)

If you have the admin role, you can configure the implementation for the Now Assist for CWM application so that your team members can utilize generative AI skills in the CWM workspace.

Before you begin

- The minimum version of CWM application that is required to support Now Assist for CWM features is v6.0.0 and later. If you're on earlier versions, upgrade your app through Application Manager. See Update an application or plugin.
- Install the Now Assist for Collaborative Work Management (CWM) plugin (sn_cwm_ai). See Install Now Assist plugins.
- Turn on the Now Assist panel.

Role required: admin

About this task

Use the Now Assist Admin console to activate the following skills of Now Assist for CWM.

- Docs summarization in Collaborative Work Management
- Tasks generation

Note:
Now LLM Service is the default provider for this Now Assist application's skills.

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Procedure

1. Navigate to **All** > **Now Assist Admin** > **Skills**.
   The **Now Assist Skills** tab of the Now Assist Admin console is displayed.
2. From the **Technology** grouping, select **CWM**.
   The skills for CWM are displayed as tiles.
3. For the skill that you want to activate, select **Activate skill**.
4. Review the skill configuration settings from the following sections.
   - Choose inputs: These are the skill settings for summarizing and refining selected content within a CWM Doc page.

     This section is not available for the Tasks generation skill.
   - Select **Save and continue**.
   - Page inputs: These are the skill settings for summarizing the whole content of a CWM Doc page.

     This section is not available for the Tasks generation skill.

     To edit the inputs, switch your application scope to **Now Assist for Collaborative Work Management (CWM)**.
   - Select **Save and continue**.
   - Select display:
     - **In-product desktop**: Enabling this option shows the skill within the CWM workspace.
     - **Now Assist panel**: Enabling this option shows the skill within the Now Assist panel.

     Note:
     The display options are available based on the skill.
   - Select **Save and continue**.
   - Review and activate: Review your selections for the skill.
5. Select **Activate**.

Result
The skill is successfully activated.

What to do next
Return to the CWM skill grouping and repeat the process to activate any remaining skills.

Related topics
Supporting information for Now Assist for Collaborative Work Management (CWM)

Using Now Assist for Collaborative Work Management (CWM)

Save time, reduce manual effort, and improve overall efficiency by using the generative AI capabilities of Now Assist for CWM.

The following tasks provide guidance on using Now Assist skills within the CWM workspace. Navigate to the task that suits your use case.

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- Summarize and refine content of a Doc page in Collaborative Work Management (CWM).
- Generate tasks from Docs in Collaborative Work Management (CWM).

Summarize and refine content of a Doc page in Collaborative Work Management (CWM)

Gain insights into the page content by summarizing it or improve content quality by refining it in CWM Docs.

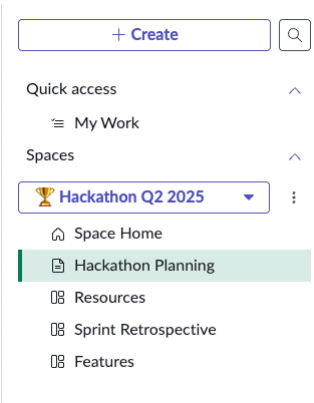
Before you begin

- Create a Doc in CWM.
- Activate the Docs summarization in Collaborative Work Management Now Assist skill. See Configure Now Assist for Collaborative Work Management (CWM).

Role required: sn_cwm_ai.cwm_ai_user

Procedure

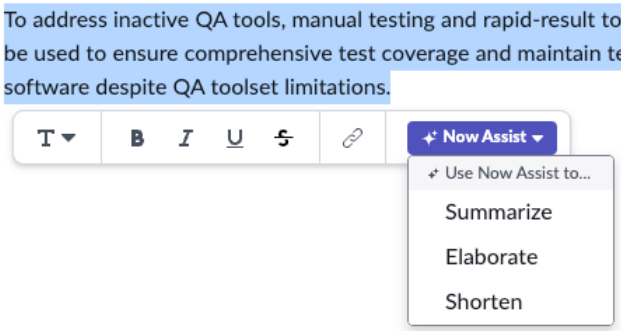
1. Navigate to **Workspaces** > **Collaborative Work Management**.
2. From the Spaces menu, navigate to the Space where your Doc is located and open it.



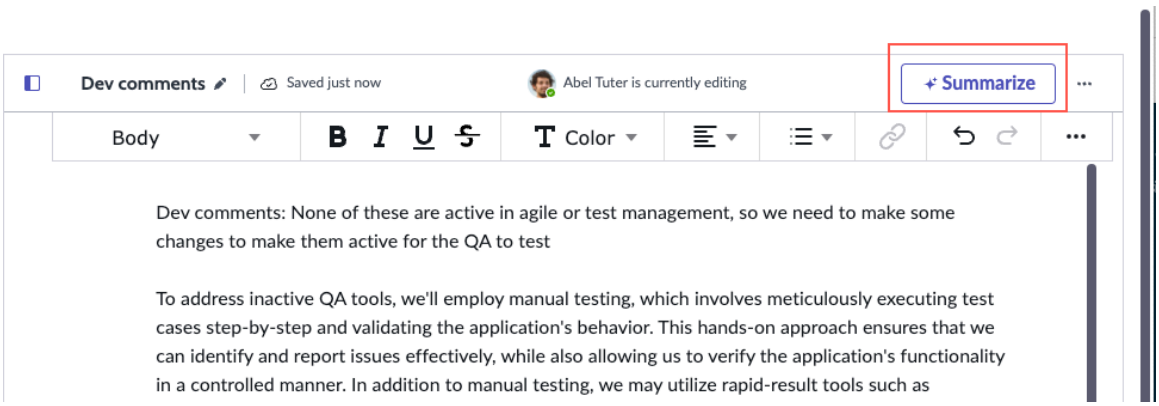
3. From your Doc, open the page you want to summarize or refine.
4. Choose to summarize the selected text on the page or the whole page.
   - To refine the selected text:
     a. Select a single block or multiple blocks of content on the page.
     b. Select **Now Assist** and choose an option.

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- **Summarize** to summarize the selected text.
- **Elaborate** to lengthen the selected text based on the existing context.
- **Shorten** to make the selected text concise.



- To summarize the entire content on the page, select **Summarize** from the Doc header.



Tip:
If there's more content to summarize, you can remove some text and retry.

Now Assist analyzes the text and generates an output in a separate pop-up.

5. **Optional:** Based on the output generated, you can further refine the result.
6. **Optional:** Copy the generated output by selecting the copy to clipboard icon ( ) to use it for purposes such as sending an email, saving to notes, and others.

Important:
Because the output is AI-generated, review it to ensure accuracy.

Generate tasks from Docs in Collaborative Work Management (CWM)

Use the generative AI capabilities of Now Assist to create tasks from the content of your Docs and help you add them to the required Board in CWM workspace.

Before you begin

Create a Doc in CWM

Role required: sn_cwm_ai.cwm_ai_user

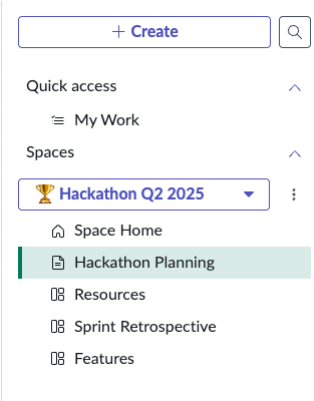
About this task

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https://player.vimeo.com/video/1079861522?h=a6bccdb612&badge=0&autopause=0&player_id=0&app_id=58479

Procedure

1. Navigate to **Workspaces** > *Collaborative Work Management*.
2. From the Spaces menu, navigate to the Space where your Doc is located and open it.

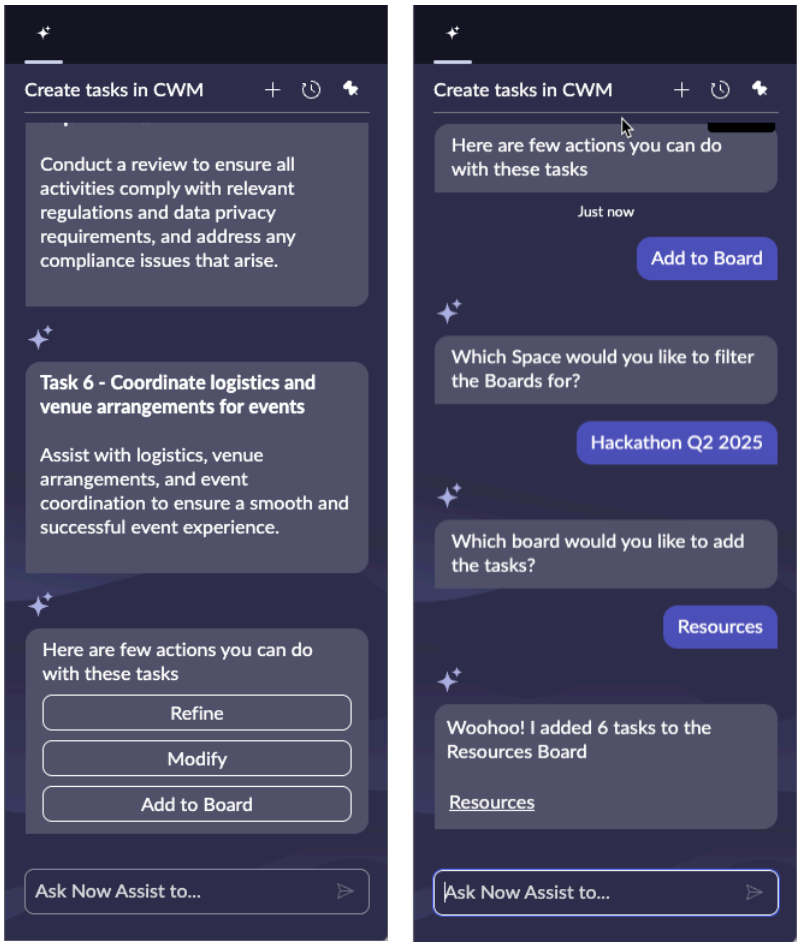


3. From the header of your ServiceNow instance, select **Now Assist** ( ).
   The Now Assist panel opens up. The next steps are performed within the panel. So, to experience an easier interaction within the panel, you can pin it.
4. **Optional:** Select **New chat** ( ) to start a new conversation within the Now Assist panel.
   Perform this step if you want to end an already open conversation or if you're unable to see the **Create tasks in CWM** option within the panel.
5. Select **Create tasks in CWM**.
   Now Assist generates recommendations for tasks based on the information on your Doc page.
6. **Optional:** Go through the task recommendations and choose to refine or modify any task recommendation.
7. You can iterate on refining or modifying the tasks and when you're satisfied with the recommendations, select **Add to Board**.
8. Select the Space of the CWM Board to which you want to add these tasks to.
9. Select the Board to add these tasks to.

   Now Assist adds all the generated task recommendations to the selected Board. You can navigate to the Board through the link provided in the Now Assist message to review them.

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Note:
If the Space you selected in Step 8 has just one Board, then you won't be asked to select a Board. The tasks are added to the Board directly.



Now Assist for Collaborative Work Management (CWM) reference

Reference topics provide details on the roles installed with Now Assist for CWM.

Roles installed with Now Assist for Collaborative Work Management (CWM)

The CWM AI user role (sn_cwm_ai.cwm_ai_user) enables users to use the generative AI skills that are available with the Now Assist for CWM application.

Contains Roles

Roles contained within the sn_cwm_ai.cwm_ai_user role: *sn_cwm.cwm_user*

Groups

Groups this role is assigned to by default: None.

Special considerations

None.

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Goal Framework and Goal Framework for SPM

Create goals, set targets for them, and evaluate the progress of the goals and targets to accomplish your organizational plans and drive business outcomes using ServiceNow® Goal Framework.

The ServiceNow® Goal Framework for Strategic Portfolio Management (SPM) application (formerly known as Advanced Goal Framework) enables you to automate the actual value of your targets. The Goal Framework for SPM application is an extension to the Goal Framework application. When you install the Goal Framework for SPM application, you get all the features of Goal Framework as well as the target automation feature.

Using Goal Framework, you can define strategic priorities and associated goals for your organization as part of strategic plans. After goals are created, you can then associate work, planning items, and strategic items such as demand, project, epic, program, and initiative.

The ServiceNow® Strategic Planning users can define personalized portfolio plans using lenses for your organization and use them to align your goals according to your organization's portfolio plans. For information on how a portfolio plan is defined using a lens, see Lens and portfolio plans. You can also create strategic plans, capturing the vision, mission, and values for your organization.

Key benefits of Goal Framework:

- Helps ensure that the entire organization focuses efforts on the same strategic priorities.
- Makes goals that align and focus effort visible.
- Enables the association of work or planning items with goals so that the work being done to accomplish goals and meet targets is easily visible.
- Provides real-time checkpoints for goals over weekly, monthly, and quarterly durations.
- Provides an end-to-end view of goal performance to users with the sn_gf.epmo_strategy_planner role.

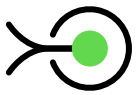
Key benefits of Goal Framework for SPM:

- Enables you to automate the actual value of your targets by collecting the actuals from different target sources such as benefit plans, cost plans, assessments/surveys, and PA Indicators.
- Enables you to configure any table or combination of tables that are present on the ServiceNow AI Platform® as a target source.

Get started

Explore	Compare	Configure
		
Learn about Goal Framework and Goal Framework for SPM features	Compare capabilities of Goal Framework with Goal Framework for SPM	Learn how to configure Goal Framework and Goal Framework for SPM

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Use	Reference	
 Learn how to define goals to accomplish your organizational plans and drive business outcomes	 Get details about components like fields, tables, roles, and properties.	

Troubleshoot and get help

- Ask or answer questions in the Strategic Portfolio Management forum on the ServiceNow Community.
- Search the Known Error Portal for known error articles. For more information, see Search the Known Error Portal for known error articles.
- Contact Customer Service and Support. For more information, see Contact Customer Service and Support.

Exploring Goal Framework and Goal Framework for SPM

The Goal Framework application helps you create goals, set targets for them, and evaluate the progress of the goals and targets to accomplish your organizational plans and drive business outcomes.

The Goal Framework for Strategic Portfolio Management (SPM) application enables you to automate the actual value of your targets by collecting the actuals from different target sources such as benefit plans, cost plans, assessments/surveys, and PA Indicators.

Goal Framework key components:

- Strategic priorities: Actions of a strategic plan that help to orient your organizational strategic plan toward your goal.
- Goals: Objectives that you want to reach based on your strategic plans.
- Targets: Targets for goals to track and measure the progress of the goals.

Goal Framework for SPM key component:

Target source is the key component of Goal Framework for SPM. Target source is a configuration for a target that is used to auto-update the actual value of the target, so that the progress of the target and its goal is auto-updated.

Strategic priorities

Strategic priorities are the objectives of your organizational plans. Strategic priorities help you to achieve your goals over a designated time period. The strategic priorities are also known as focus areas or long-term strategies. Defining strategic priorities helps to orient your organizational strategic plans toward your goals.

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Goals

Goals refer to objectives that an organization sets for itself to accomplish their organizational plans. Goals are typically qualitative in nature. Goals should be ambitious and are expected to motivate and challenge your teams. Some examples of goals are as follows:

- Using renewable energy by the end of the year 2022.
- Increase diversity in the workplace by 50 percent.

A goal can also have sub-goals. You can also associate work and planning items to a goal so that you can track who is responsible for fulfilling the goal.

If you use Goal Framework with other products, you can also do the following:

- If you're a ServiceNow® Project Portfolio Management user, you can associate demands, projects, and programs with a goal to capture the work being done to meet your goal.
- If you're a ServiceNow® Agile Development 2.0 user, you can associate scrum epics with a goal to capture the work being done to meet your goal.
- If you're a ServiceNow® Scaled Agile Framework (SAFe) user, you can associate SAFe epics and SAFe features with a goal to capture the work being done to meet your goal.
- If you're a Strategic Planning user, you can associate planning items - Demand, Project, and Epic, and strategic items - Program and Initiative - with a goal to capture the work being done to meet your goal.

Targets

Targets help you to measure your goal. For example, to meet the goal of increasing diversity in the workplace by 50 percent, the target can be to hire a 30 percent-diverse workforce by the first quarter of 2022.

Targets can be set as a quantitative or qualitative by defining the unit of measure for the target. Quantitative targets are numbers-based, countable, and measurable. Qualitative targets are interpretation-based, descriptive, typically yes or no type.

You can also breakdown a target into smaller periods (example, Quarterly) which helps you set a target for each quarter and focus on the specific breakdown targets. The target breakdowns are automatically created based on the breakdown interval set for the target. For details on how the target breakdowns feature works, see Target breakdowns.

Qualitative targets

Qualitative targets are typically non-measurable but can be tracked whether the target has been achieved. The available unit of measure for qualitative targets is Yes/No. You can also define a custom unit of measure (for the available choice set) for qualitative targets as per your need and set qualitative targets for your goals.

For example, to achieve a target of conducting hackathon in Q2-2023, the target can be set as conduct hackathon in Q2-2023 with the unit of measure Yes/No. Base and target value of the target can be No and Yes respectively. After the target is successful with the hackathon event, the target value can be updated to Yes.

Target sources

Target source is a configuration for a target that is used to auto-update the actual value of the target, so that the progress of the target and its goal is auto-updated. Any table or a combination of tables (for example, benefit plans, cost plans, surveys, incidents, and PA indicators) present on the ServiceNow AI Platform® can be configured as a target source.

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The following target source types are supported for automating the actual value of a target.

- PA Indicator: Updates the **Actual value** field on the target form by fetching the required data from the PA Indicator.
- Assessment/Survey: Updates the **Actual value** field on the target form by fetching the required data from the Assessment metric type and Assessment metric category records.
- Custom script: The Custom script fetches the required data from any ServiceNow AI Platform table that is configured. With the Custom script option, any table or a combination of tables present on the ServiceNow AI Platform can be configured as a target source.

  Predefined target automation script for benefit plans: The predefined, default script is a target source that updates the **Actual value** field on the target form by fetching the value from the **Actual benefit** field or **Non-monetary actual benefit** field from the monetary or non-monetary benefit plans of relevant work items.

  Context variable

  The context variable is an additional configuration for the target source. The context variable provides information that can be used on the target form to fetch the required data and update the **Actual value** field on the Target form. The context variable is required for target source types Assessment/Survey and PA Indicator. If the Goal Framework for SPM scope is selected while creating a target source, the context variable is automatically created for the target source (of type Assessment/Survey and PA Indicator). For more information on context variables, see Context variable in target source.

Benefits and workflow

Use the Goal Framework or Goal Framework for SPM application to do the following activities:

- Create a strategic plan for your organization (If Strategic Planning is installed). For more information, see Create a strategic plan.
- Create a strategic priority to orient your organization strategic plan toward your goal. For more information, see Create a strategic priority for a strategic plan.
- Create a goal. For more information, see Create a goal.
- (For Goal Framework users) Set targets for a goal to track and measure the progress of the goal. For more information, see Set targets for a goal.
- (For Goal Framework for SPM users) Set targets and automate the actual value of the targets. For more information, see Configuring target source for target automation using Goal Framework for SPM.
- Create a goal relationship with a work, planning, strategic, or any other item to identify and associate your current or future work and achieve your goals. For more information, see Associate a work or planning item with goals or targets.
- Associate the primary goal for a work and planning item. For more information, see Associate the primary goal for work and planning items.

Comparing Goal Framework with Goal Framework for SPM

- Goal Framework: Create goals, set targets for them, and evaluate the progress of the goals and targets to accomplish the organizational plans and drive business outcomes.
- Goal Framework for SPM: Automate the actual value of your targets by collecting the actuals from different target sources such as benefit plans, cost plans, assessments/surveys, and PA Indicators.

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Comparison of Goal Framework and Goal Framework for SPM features

Feature	Goal Framework	Goal Framework for SPM
Create strategic plans	No	Yes
Create strategic priorities	Yes	Yes
Create goals	Yes	Yes
Set targets	Yes	Yes
Set target breakdowns	No	Yes
Associate work with goals	Yes	Yes
Automate actual value of targets	No	Yes

Note:
The Goal Framework for SPM application is an extension to the Goal Framework application. When you install the Goal Framework for SPM application, you get all the features of Goal Framework as well as the target automation feature.

Configuring Goal Framework and Goal Framework for SPM

As an administrator, use this section to set up the Goal Framework and Goal Framework for SPM applications.

Install Goal Framework and Goal Framework for SPM

You can install the Goal Framework (sn_gf) and Goal Framework for SPM (sn_gfa) applications if you have the admin role.

Before you begin
Ensure that the applications and all associated store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

When you install the Goal Framework for SPM application, you get all the features of Goal Framework as well as the target automation feature.

Role required: admin

Important:
You can install the Goal Framework for SPM application only when you own the Strategic Portfolio Management (SPM), formerly the (ITBM) Pro license.

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the Goal Framework or Goal Framework for SPM application using the filter criteria and search bar.
   You can search for the application by its name or ID (sn_gf or sn_gfa). If you can't find an application, you may have to request it from ServiceNow store. Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release note information for all released apps, see the ServiceNow Store version history release notes.
3. Click **Install**.

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4. In the Application installation dialog box, review the application dependencies.

   If your application requires other applications, install them first if they aren't already installed.

   Installing your application also automatically installs the dependent applications or plugins if they aren't installed already.

5. Click **Install**.

Result

The following components are installed with installation of the Goal Framework or Goal Framework for SPM application:

- Roles
- Tables
- Scheduled jobs
- Target automation script for benefit plans (installed with Goal Framework for SPM)

As part of Goal Framework for SPM installation, components of both Goal Framework and Goal Framework for SPM are installed. See Components installed with Goal Framework and Goal Framework for SPM for more information.

Migrate existing goals data to Goal Framework tables

With the admin role, you can migrate the existing goals data to the Goal Framework tables by running the scheduled job.

Before you begin

Role required: admin

About this task

Note:
Migrating data to the Goal Framework tables is a one-time job, and not meant to be on a schedule.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Search for and click the **Migrate Goal, Strategy, and Work item data to the Goal Framework and related Planning item tables** scheduled job.
3. On the Scheduled Script Execution form:

   a. Ensure that the frequency is selected as **On Demand** in the **Run** field.

   b. Set the value to **true** for the required parameters in the **Run this script** field.
   For parameters information, see Migrate Goal, Strategy, and Work item data to the Goal Framework and related Planning item tables.

4. Click **Execute Now**.

Configure goal preferences

Configure goal preferences to manage goals such as the calendar type used for goal setting, weighted average calculation for goal progress, and deletion of goals and targets.

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Before you begin
Role required: sn_gf.goal_admin

Procedure

1. Navigate to **All** > **Enterprise Goal Management** > **Preferences**.
2. On the Goal Preferences form, configure the properties.
   For properties information, see Goal Preferences form.
3. Click **Save**.

Configure a table for an assigned entity

Configure a table for an assigned entity type so that the goal user can associate goals with the required assigned entity.

Before you begin

- By default, with the installation of Goal Framework, the assigned entities, Business Unit [business_unit], Department [cmn_department], and Company [core_company] are installed.
- With the activation of PPM Standard (Project Portfolio Management), the Portfolio [pm_portfolio] assigned entity is installed.
- With the installation of Strategic Planning, the assigned entities, Product Model [cmdb_model], Value Stream [cmn_value_stream], Initiative [sn_align_core_initiative], and Strategic Program [sn_align_core_program] are installed.

Role required: sn_gf.goal_admin

About this task
An assigned entity is an organizational unit or structure that a goal can be associated with, such as a business unit or department. Assigned entities provide context for goals by linking them to the relevant part of your organization, making it easier to track and manage goals at any level.

Procedure

1. Navigate to **All** > **Enterprise Goal Management** > **Assigned Entities**.
2. Click **New**.
3. On the form, fill in the fields.
   For a description of the field values, see Goal Assigned Entity Configuration form.
4. Click **Submit**.

Import goals and targets data from a spreadsheet

With the admin role, you can import your existing goals and targets data from a spreadsheet to the Goal Framework tables.

Before you begin

- On a successful job run, the goals data from your spreadsheet is imported to the Goal [sn_gf_goal] table.
- On a successful job run, the targets data from your spreadsheet is imported to the Target [sn_gf_goal_target] table.

Note:
Because the targets are associated to a goal, you should import the goals first and then the targets.

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Important:
Goals and targets data in the spreadsheet must be in the supported format. For details on the supported data format to import goals and targets data from a spreadsheet, see Import goals and targets data [KB1191233].

Role required: admin

Procedure

1. Navigate to **All** > **System Import Sets** > **Load Data**.
2. From the Import set table drop-down list, select **Goal Import Set [imp_sn_gf_goal]** or **Target Import Set [imp_sn_gf_goal_target]**.
3. From the **Source of the import** option, select **File**.
4. In the **File** option, click **Choose** and select your spreadsheet to import the data.

   Important:
   - Goals and targets data in the spreadsheet must be in a specific format. For details on the supported data format, see Import goals and targets data [KB1191233].
   - Don't modify the names in the header row of the spreadsheet because the data is imported to the respective fields in the goal and target tables based on the header title of each column.

5. Click **Submit**.
6. On the Progress page, click **Run Transform**.
7. On the Specify Import set and Transform map page, click **Transform**.
8. Click **Transform history** and verify that the State column is set to **Complete** in the Import Set Runs related list.
   Depending on the option that you selected from the Import set table drop-down list, your goals or targets data is imported to the Goal [sn_gf_goal] or Target [sn_gf_goal_target] tables.

   If the job is failed, click **Transform history** and refer to the details.

   Note:
   The Import operation can be used for inserting new data or updating the existing data in the tables. By default, the Name and Owner values are the primary keys used for updating the existing records. You can also add additional fields as primary key for inserting new data or updating the existing data. For details on how to add additional fields as primary key, see Import goals and targets data [KB1191233].

Update a scheduled job to automate the Actual value of the targets

Use the Goal Framework for SPM application to modify the run time for the scheduled job according to your preference to auto-update the actual value of the targets for which a target source has been configured.

Before you begin
Role required: admin

About this task
By default, the scheduled job runs daily at 00:00:00 AM (System Time Zone).

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Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Search for and click the **Update Actual value of the targets using Goal Framework for SPM** scheduled job.
3. Ensure that the **Active** check box is selected to run the job at a scheduled time.
4. Edit the details of the **Run** and **Time** fields according to your preference.
5. Click **Update**.
   To learn more about scheduled jobs, see Scheduled jobs.

Configuring target source for target automation using Goal Framework for SPM

Configure target sources for target automation so that the goal user can define a target source when setting a target for the goal. Defining a target source for a target updates the actual value of the target automatically.

Use the following steps as guidelines for setting targets and automating the actual value of the targets using Goal Framework for SPM. Some of these steps require the sn_gf.goal_user role and some require the sn_gf.goal_admin role.

1. Create a target source for a target to configure it as a source to update the actual value of the target. For more information, see Create a target source.

   The context variable is required for target source types Assessment/Survey and PA Indicator. The mandatory context variables are automatically created while creating a target source with the type selected as Assessment/Surveys or PA Indicator. For more information on when the mandatory context variables are created, see Context variable in target source.

2. If required, create context variables for the target source so that the required data is fetched from the context variables to update the actual value of the target. For more information, see Create context variables for a target source.

Context variable in target source

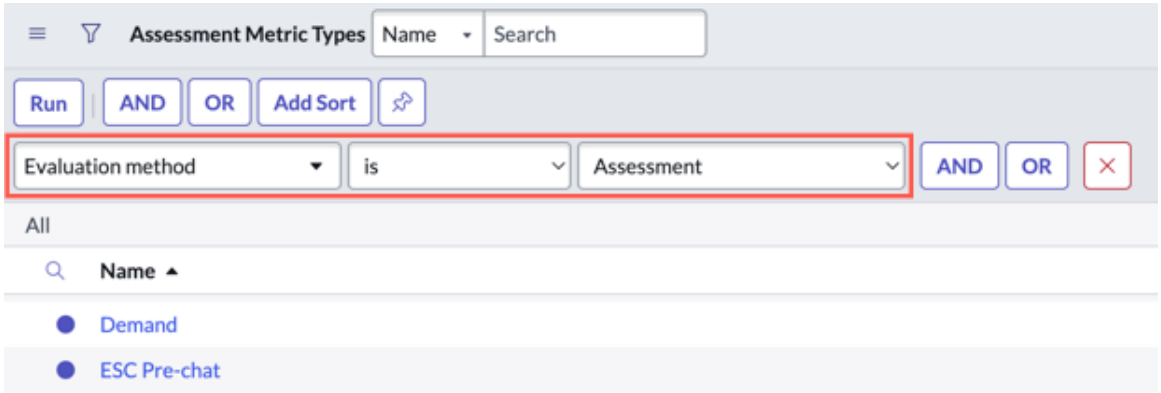
The context variable is an additional configuration for the target source that can be used on the Target form to fetch the required data and auto-update the **Actual value** field on the Target form. A context variable is required for target source types Assessment/Survey and PA Indicator.

The context variable is automatically created (with the **Mandatory** field set to **true** on the context variable form) for the target source (of type Assessment/Survey and PA Indicator) when the Goal Framework for SPM scope is selected before creating a target source. The context variables created automatically are also known as mandatory context variables.

The mandatory context variables are created when you've selected the Goal Framework for SPM scope and you've met one of the following conditions:

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- (For target source type, Assessment/Survey) On the Target Source form, the **Type** field is set to **Assessment/Survey** and the **Assessment Metric Types** field is populated with a metric type of **Evaluation method = Assessment**.



- (For target source type, PA Indicator) On the Target Source form, the **Type** field is set to **PA Indicator** and the value populated in the **Breakdown** field isn't of Choice list type.

  To create a context variable for the target source type, PA Indicator, where the Breakdown field is of Choice list type, see Create a context variable for the target source type PA Indicator.

Note:
Mandatory context variables can't be deleted.

You can also create context variables manually for a target source and use them to configure for fetching the required data and auto-updating the **Actual value** field on the Target form. For more information on how to create a context variable manually, see Create context variable for a target source.

Create a target source for automating the Actual value of the targets

Create a target source so that the goal user can configure it for the targets to automate the Actual value of the targets.

Before you begin
Select the Goal Framework for SPM scope for the application.

Role required: sn_gf.goal_admin

About this task
The context variable is required for target source types Assessment/Survey and PA Indicator. The mandatory context variables are automatically created while creating a target source with the type selected as Assessment/Surveys or PA Indicator. For more information on when the mandatory context variables are created, see Context variable in target source.

Procedure
1. Navigate to **All** > **Enterprise Goal Management** > **Target Sources**.
2. Click **New**.
3. On the form, fill in the fields.
   For a description of the field values, see Target Source form.
4. Click **Submit**.

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Create context variable for a target source

Create a context variable manually if you want to configure more context variables for a target source.

Before you begin

Select the Goal Framework for SPM scope for the application.

Role required: sn_gf.goal_admin

About this task

The Context variable provides information that can be used to fetch the required data and auto-update the Actual value on the target form. After a context variable is created for the target source, the goal user can configure the Actual Value Source Configuration section on the Target form so that the Actual value gets auto-updated.

Creating a context variable is similar to creating a column on a table.

To create a context variable for the target source type PA Indicator and the breakdown is of Choice list type, see Create a context variable for the target source type PA Indicator.

Procedure

1. Navigate to **All** > **Enterprise Goal Management** > **Target Sources**.
2. Open the required target source that you want to create a context variable for.
3. In the Context Variables related list, click **New**.
4. On the form, fill in the fields.
   For a description of the field values, see Context Variable form.
5. Click **Submit**.

Create a context variable for the target source type PA Indicator

Create a context variable manually for the target source type PA Indicator if the breakdown is of Choice list type.

Before you begin

Select the Goal Framework for SPM scope for the application.

Role required: sn_gf.goal_admin

About this task

The context variable provides information that can be used to fetch the required data and auto-update the Actual value on the Target form. After a context variable is created for the target source, the goal user can configure the Actual Value Source Configuration section on the Target form for the Actual value to get auto-updated.

Creating a context variable is similar to creating a column on a table.

Procedure

1. Navigate to **All** > **Enterprise Goal Management** > **Target Sources**.
2. Open the required target source that you want to create a context variable for.
3. In the Context Variables related list, click **New**.
4. On the form, fill in the **Type** field as Choice and the other fields as needed.
   For a description of the field values, see Context Variable form.
5. Click **Submit**.

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A context variable of choice type is created.

6. In the Choices related list of the context variable you created, click **New**.

> **Note:**
> If you don't see the Choices related list on the Context Variable form, add it by navigating to **Configure** > **Related Lists** on the form.

7. On the form, fill in the fields.

Choice form

Field	Description
Table	Name of the context variable for which the choice is created.
Element	Column name in the context variable form for which the choice is created.
Label	Name of the choice.
Value	Sys_id of the choice value for which the context variable is created. You can copy the sys_id from the Choices related list of the Dictionary Entry [sys_dictionary] table.

8. Click **Submit**.
9. **Optional:** Repeat the steps 6 through 8 to create more choices for the context variable.

What to do next
The goal user can configure these choices as context variables on the Target form for which the target source is configured.

Migrate target breakdowns

After upgrading to Goal Framework for SPM v2.3.0 or later, run the **Migrate BreakdownInterval To Checkinfrequency** scheduled job to migrate the existing values from the **Review frequency** field to the **Check-in frequency** field in the target records.

About this task
After running the job, the value in the **Check-in frequency** field for a target is populated based on the existing value in the **Review frequency** field of the target. If the existing value in the **Review frequency** field was set to any option other than **None**, then target breakdowns will be created for such targets based on the value in the existing check-in frequency of the target. For more information on how these values are migrated for targets with different values, see Target breakdowns migration.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Search for and select the **Migrate BreakdownInterval To Checkinfrequency** scheduled job.
3. On the Scheduled Script Execution form, ensure that the frequency is selected as **On Demand** in the **Run** field.
4. Select **Execute Now**.

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Target breakdowns migration

As an administrator, when you run the **Migrate BreakdownInterval To Checkinfrequency** scheduled job, the existing values in the **Review frequency** and **Breakdown interval** fields are migrated to the **Check-in frequency** field in the target records.

The value in the **Actual to date** field for the target and values in the **Planned target value** and **Actual** fields for the target breakdowns are populated based on the current actual value of the target and values in the existing target breakdowns.

Target breakdowns migration for targets with breakdown interval set to None

After running the job, the value in the **Check-in frequency** field for a target is populated based on the existing value in the **Review frequency** field of the target. If the existing value in the **Review frequency** field was set to any option other than **None**, then target breakdowns will be created for such targets based on the existing review frequency of the target. Even though **Breakdown interval** was set to **None** for a target, target breakdowns will be created for the target based on the existing review frequency of the target.

The following table describes how the check-in frequency value is populated for targets with different values in the **Review frequency** and **Breakdown interval** fields.

Target breakdowns migration with breakdown interval set to None

Review frequency (Before upgrade)	Breakdown interval (Before upgrade)	Check-in frequency (After upgrading and running the job)
Yearly	None	Yearly
Quarterly	None	Quarterly
Monthly	None	Monthly
Fortnightly	None	Fortnightly The Fortnightly option is retained and no target breakdowns will be created because the Fortnightly option is no longer supported. After the owner or a contributor of the target updates the check-in frequency for the target, the target breakdowns will be created accordingly.
Weekly	None	Weekly
Daily	None	Daily
None	None	None In this case, no target breakdowns will be created.

For example, consider a scenario where details of a target are as follows before upgrade:

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- The base value and target value of the target is 0 and 100, respectively
- The review frequency is set to **Monthly** and Breakdown interval was set to **None**
- The start date and end date of the target are 2024-01-01 and 2024-12-31, respectively
- The current actual value of the target is 60 and the current month is August

In this case, after running the scheduled job 12 monthly target breakdowns are created for the target and the current actual value as 60 is populated in the August monthly breakdown. Also, the planned target value is populated for each breakdown.

Target breakdowns migration for targets with breakdown interval set to Quarterly or Yearly

After running the job, the value in the **Check-in frequency** field for a target is populated based on the existing value in the **Review frequency** field of the target. Then, target breakdowns are created for the targets based on the existing review frequency of the target.

The following table describes how the check-in frequency value is populated for targets with different values in the **Review frequency** and **Breakdown interval** fields.

Target breakdowns migration with breakdown interval set to Quarterly or Yearly

Review frequency (Before upgrade)	Breakdown interval (Before upgrade)	Check-in frequency (After upgrading and running the job)
Quarterly	Quarterly	Quarterly
Quarterly	Yearly	Quarterly

Note:
For targets with breakdowns interval set to Yearly, irrespective of the target is of type cumulative or non-cumulative, after running the scheduled job quarterly target breakdowns will be created and the Target value distribution is set to **Spread linearly across the time period (cumulative)** for the target.

For example, consider a scenario where details of a target are as follows before upgrade:

- The base value and target value of the target is 0 and 80, respectively
- The review frequency is set to **Quarterly** and Breakdown interval was set to **Yearly**
- The start date and end date of the target are 2023-01-01 and 2024-12-31, respectively
- The target is of type non-cumulative
- The actual value achieved in each quarter is 10 starting from Q1-2023 till Q2-2024
- The current total actual value of the target is 60 and the current quarter is Q2-2024

In this case, after running the scheduled job 8 quarterly breakdowns are created and the Target value distribution is set to **Spread linearly across the time period (cumulative)** for the target. The current actual value for Q1-2023, Q2-2023, Q3-2023, Q4-2023, Q1-2024, and Q2-2024 quarterly target breakdowns are populated as 10, 20, 30, 40, 50, and 60, respectively. Also, the planned target value is populated for each breakdown.

Defining a custom unit of measure

Defining a custom unit of measure helps the goal users to set the unit of measure for targets as per their choice. Unit of measures are two types, quantitative and qualitative.

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By default, the available unit of measures for quantitative targets are **#**, **$**, **%**, **Days**. By default, the available unit of measure for qualitative targets is **Yes/No**.

As an administrator, you must create custom unit of measures so that the goal user can use them for setting a unit of measure for their targets:

- For quantitative targets, you can define a custom unit of measures from the Unit [sn_gf_unit] table.
- For qualitative targets, you must first create a choice set and then create a choice list for the choice set.

Managing goals using Goal Framework or Goal Framework for SPM

Understand the process required to define goals using Goal Framework.

Managing goals using Goal Framework or Goal Framework for SPM

Use the following steps as guidelines for defining your goals. Some of these steps require the sn_gf.strategy_planner role and some require the sn_gf.goal_user role. If you're an Goal Framework for SPM user, you need the sn_gf.goal_admin role to configure the target automation feature. All steps are the same for defining goals using either Goal Framework or Goal Framework for SPM.

1. Create a strategic plan to define the purpose - vision, mission, and values - of your organization. For more information, see Create a strategic plan.

   You can create strategic plans only when Strategic Planning is installed. Creating a strategic plan isn't required to define goals.

2. Create a strategic priority to orient your organization's strategic plan to your goal. For more information, see Create a strategic priority.
3. Create a goal. For more information, see Create a goal.
4. Create targets for goals to track and measure the progress of the goals. For more information, see Set targets for a goal using Goal Framework.
5. (For Goal Framework for SPM users only) Set targets for goals and configure the target sources for the targets to auto-update the actual value of the targets. After the progress of a target is updated, the target's progress is rolled up to its goal. For more information, see Configuring target source for target automation using Goal Framework for SPM .
6. Create a goal or target relationship with a work or strategic item. For more information, see Associate work or strategy with goals or targets.
7. Set a goal or target as primary for the work and planning items where the items contribute to achieving the goal. For more information, see Associating the primary goal or target for work and planning items.

Create a strategic plan

As a strategy planner, you can create and manage strategic plans for your organization. Create a strategic plan to define the purpose of your organization, its strategic priorities, and the associated goals.

Before you begin

Install Strategic Planning on your ServiceNow instance.

Role required: sn_gf.strategy_planner

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Procedure

1. Navigate to **All** > **Strategy** > **Strategic Plans**.
2. Click **New**.
3. On the form, fill in the fields.
   For field information, see Strategic Plan form.
4. Click **Submit**.

What to do next

From the Values related list, capture values for your organization such as Integrity, Commitment to customers, and Trust.

Create a strategic priority for a strategic plan

As a strategy planner, you can create and manage the strategic priorities for the strategic plans for your organization. Create a strategic priority to orient your organization strategic plan toward your goal.

Before you begin

Role required: sn_gf.strategy_planner

About this task

The strategic priorities are also known as focus areas or long-term strategies.

Procedure

1. Create a strategic priority for a strategic plan using one of the following options.
2. On the form, fill in the fields.
   For field information, see Strategic Priority form.
3. Click **Submit**.

What to do next

Define goals and set targets for them to accomplish the strategic priorities.

Create a goal

Create goals and set targets to measure overall goal progress and evaluate them to align with the organizational strategic priorities.

Before you begin

Role required: sn_gf.goal_user

About this task

Goals are typically qualitative in nature. Goals should be ambitious and are expected to motivate and challenge the teams.

Procedure

1. Navigate to **All** > **Enterprise Goal Management** > **Goals**.
2. Click **New**.
3. On the form, fill in the fields.
   For field information, see Goal form.
4. Click **Submit**.

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What to do next
Set targets for the goals.

Create targets for a goal using Goal Framework or Goal Framework for SPM

Create SMART targets for goals to track and measure the progress of the goals.

Before you begin
Role required: sn_gf.goal_user or sn_gf.goal_admin

About this task
A SMART target can be defined as S = Specific, M = Measurable, A = Attainable, R = Relevant, and T = Time-bound.

- Only the owner or contributors of the goal can create targets for the goal.
- You can also restrict the access for a target record to the specific users by enabling the **Confidential** field on the target form if the ESG Management application is installed.

Procedure

1. Create a target for a goal using one of the following options.

2. On the form, fill in the fields.
   For field information, see Target form.
3. Click **Submit**.

Result
The target progress records are automatically created when you save the target post populating the **Actuals to date** field. The target progress records specify the progress of each target for the goal.

> **Note:**
> When you delete a goal, its associated targets (if any) and their progress records are also deleted even though the **Allow the deletion of targets** property is set to **No**.

What to do next
Update the progress of the targets.

Update the progress of a manual target

Update the progress of a target when its status is changed.

Before you begin
Role required: sn_gf.goal_user

About this task

> **Note:**
> Only the owner or contributors of the goal can update targets of the goal.

Procedure

1. Open the target record of the goal using one of the following options.

2. On the Target form, update the **Actuals to date** field and add a business justification in the **Remark** field.

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For field information, see Target form.

3. Click **Update**.

Result

Once the **Actuals to date** field is updated, the progress value for the target is auto-updated. For information on how the progress value is calculated, see progress value calculation.

Related topics

Update the progress of a target using Goal Framework for SPM

Update the actual value of a target breakdown

Update the progress of a target using Goal Framework for SPM

Update the progress of a target using the **Update Actual value** related link on the Target form.

Before you begin

Role required: sn_gf.goal_user

About this task

Note:
Only the owner or contributors of the goal can update targets for the goal.

Procedure

1. Open the target record of the goal using one of the following options.

2. On the Target form, click the **Update Actual value** related link.
   For a description of the field values, see Target form.

Result

After the **Actuals to date** field is updated, the progress value for the target and its goal are auto-updated. For information on how the progress value is calculated, see progress value calculation. For information on how the progress value is calculated for a target that has target breakdowns, see Target breakdowns.

Related topics

Update the progress of a manual target

Update the actual value of a target breakdown

Target breakdowns

Breaking down a target into smaller periods (for example, Monthly) helps you set a target value for each month and focus on that specific monthly target. The target breakdowns are automatically created based on the Check-in frequency and Target value distribution set for the target.

The check-in frequency for a target can be set to Daily, Weekly, Monthly, Quarterly, or Yearly. Based on the Check-in frequency of the target, the corresponding target breakdowns are created. For example, if the Check-in frequency is set to Monthly for a target spanning for a year, 12 monthly target breakdowns are created. Planned target values are automatically set for each target breakdown based on the Target value distribution setting of the target.

Note:
The target breakdowns feature isn't supported for qualitative targets.

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The following examples help you understand how the target progress is calculated for targets with different target distribution type.

Example 1: Acquire 1200 new customers in the calender year 2025 (Track non-cumulatively)

In this example, you want to achieve a target of acquiring 1200 new customers in the calender year 2025 and track the progress monthly (non-cumulatively), then you can set the target as the following:

- Set the start date and end dates to 2025-01-01 and 2025-12-31, respectively
- Set the start value and final target values to 0 and 1200, respectively
- Set the Check-in frequency for the target to Monthly
- Set the Target value distribution to Split equally across the time period (non-cumulative)

  This Target value distribution means that the final target value is divided into 12 equal values (planned target value for each target breakdown) which aggregates to the final target value. You can edit the planned target value later from the respective target breakdown record as needed.

In this case, the application creates 12 target breakdowns (January, February, ……., and December) for calender year 2025 and sets the Planned target value for each target breakdown to 100 (Final target value divided by the number of target breakdowns).

Because the application sums up the actual value entered in each monthly target breakdown, you must enter the actual value that is achieved in the particular month for the target breakdown. For example, you acquired 100 customers in January, then enter 100 as the actual value in the January target breakdown. And, you acquired another 100 customers in February, then enter 100 as the actual value in the February target breakdown. Similarly, if you acquired another 100 in March and 100 in April, then enter 100 as the actual value in both the March and April target breakdowns.

The application sums up the actual values entered in each monthly target breakdown and rolls up the sum value to the actual value of the main target. Then, the progress of the target and its goal are auto-updated.

Example 2: Acquire 1200 new customers in the calender year 2025 (Track cumulatively)

In this example, you want to achieve a target of acquiring 1200 new customers in the calender year 2025 and track the progress monthly (cumulatively), then you can set the target as the following:

- Set the start date and end dates to 2025-01-01 and 2025-12-31, respectively
- Set the start value and final target values to 0 and 100, respectively
- Set the Check-in frequency for the target to Monthly
- Set the Target value distribution to Spread linearly across the time period (cumulative)

  This Target value distribution means that the final target value is divided linearly into 12 planned target values (such a way that the value for the last monthly breakdown is equal to the final target value). You can edit the planned target value later from the respective target breakdown record as needed.

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In this case, the application creates 12 target breakdowns (January, February,……., and December) for calender year 2025 and sets the Planned target value for the January, February,……., and December breakdowns to 100, 200,…….., and 1200 respectively.

Because the application considers only the actual value entered in the latest monthly target breakdown, you must enter the cumulative actual value in the latest monthly target breakdown. For example, you acquired 100 customers in January, then enter 100 as the actual value in the January target breakdown. And, you acquired another 100 customers in February, then enter 200 as the actual value in the February target breakdown. Similarly, if you acquired another 100 in March and 100 in April, then enter 300 and 400 as the actual value in the March and April target breakdowns, respectively.

The application considers the actual value entered in the latest monthly target breakdown and rolls up to the actual value of the main target. Then, the progress of the target and its goal are auto-updated.

Benefits of target breakdowns

The target breakdowns feature helps you when you want to set a target for a period but want to track the progress of the target in smaller periods such as daily, weekly, monthly, quarterly, and yearly. For example, you have set a target for a year with start value and final target values of 0 and 1200, respectively. Also, you want to set monthly targets of 100 for each quarter. In this case, you can break down the target into monthly targets and set a target value for each month so that you can focus on the specific monthly target and update your actuals against those monthly targets.

The target breakdowns feature has the following benefits:

- Break down the long-term targets into short-term intervals such as Daily, Weekly, Monthly, Quarterly, and Yearly for a better tracking or reporting of your progress
- Set or modify a planned target value for each target breakdown as needed
- Update the actual value for each target breakdown and track the progress of the main target
- Focus on the specific short-term target (target breakdown) rather than the whole target
- Track the progress of your short-term and long-term targets cumulatively or non-cumulatively

How the actual value is calculated when the check-in frequency set to None

When the check-in frequency is set to None for a target, the actual value must be entered in the **Actuals to date** field in the main target record. The actual value entered must be cumulative irrespective of the time period of the target. Target breakdowns aren't created when the check-in frequency is set to None.

Target breakdowns in target automation

If you've enabled the target automation feature for a target and set the check-in frequency and Target value distribution, the target automation feature automatically updates the actual value in the respective target breakdown based on the check-in due date. After the actual value of a target breakdown is updated, the value is rolled up to rolls up to the actual value of the main target. Then, the progress of the target and its goal are auto-updated.

Update the actual value of a target breakdown

Update the actual value of a target breakdown when its status is changed. Updating the actual value of a target breakdown automatically updates the actual value of its target. After the **Actual** field of the target is updated, the progress value for the target and its goal is auto-updated.

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Before you begin
Role required: sn_gf.goal_user

About this task

Note:
Only the owner or contributors of the goal can update the target breakdowns.

Procedure

1. Open the target record of the goal using one of the following options.

2. On the Target form, update the **Actual** field and add a business justification in the **Remark** field.
   For field information, see Target Breakdown form.
3. Select **Update**.

Result
After the **Actual** field is updated, the progress value for the target and its goal is auto-updated. For information on how the progress value is calculated, see Progress value calculation. For information on how the actual value of the target breakdown is rolled up to its target, see Target breakdowns.

Related topics

Update the progress of a manual target

Update the progress of a target using Goal Framework for SPM

Associate a work or planning item with goals or targets

Create a goal or target relationship with a work, planning, strategic, or any other item to identify and associate your current or future work and achieve your goals and targets.

Before you begin
Role required: sn_gf.goal_user

About this task
You can associate a goal or target with only one of the work items (Project, Demand, Program, Scrum Feature, Scrum/SAFe Epic), or SAFe Feature, planning items (Project, Demand, or Epic), or strategic items (Program or Initiative) at a time. To associate more than one item with a goal or target, create one goal or target relationship record for each item.

- You can associate a goal or target with the Project, Demand, and Program work items only when PPM Standard (Project Portfolio Management) is installed.
- You can associate a goal or target with the Scrum Feature and Scrum Epic work items only when Agile Development 2.0 is installed.
- You can associate a goal with the SAFe Epic and SAFe Feature work items only when Scaled Agile Framework (SAFe) is installed.
- You can associate a goal or target with the planning items (Project, Demand, and Epic) and strategic items (Program and Initiative) only when Strategic Planning is installed.

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Note:

- Depending on the plugin that is installed - PPM or Strategic Planning - the respective related list appears on the Goal and Target form. If PPM is installed, the Project, Demand, and Program work item related lists appear on the Goal and Target form. If only Strategic Planning is installed or both PPM and Strategic Planning are installed, the Planning items and Other items related lists appear on the Goal and Target form respectively.
- When a goal or target relationship is created with a work item (Project, Demand, Program, Scrum Feature, Scrum/SAFe Epic, or SAFe Feature), the record appears on the respective related list on the Goal or Target form. When a goal or target relationship is created with a planning item (Project, Demand, or Epic), the record appears in the Planning items related list on the Goal or Target form. When a goal or target relationship is created with a strategic item (Program or Initiative) or any other item, the record appears in the Other items related list on the Goal or Target form respectively.

Procedure

1. Navigate to **All** > **Enterprise Goal Management** > **Goals**.
2. Open the required goal or target.
3. Create a goal or target relationship with a work or planning item using the following options.
4. Click **Submit**.

Associating the primary goal or target for work and planning items

You can associate a goal or target as the primary for the work and planning items where the items contribute to achieving the goal or target. You need different roles to set a goal or target as the primary for work and planning items.

You can associate a goal or target as primary to work and planning items by populating the **Primary goal** and **Primary target** fields on the Project, Demand, Program, Feature, Epic, and Planning item forms.

You can also associate non-primary goals or targets to work and planning items from the Goal/Target Relationships related list on the Project, Demand, Program, Feature, Epic, and Planning item forms.

Once you associate work and planning items to goals or targets, you can check these relationships directly in the goal's or target's related list or in the respective work or planning item's related list.

The following table describes how the primary goal or target can be set for each work and planning item.

Work / Planning item	Plugin required	Role required	Steps to associate the primary goal
Project	PPM Standard	project_manager	1. Open the required project. 2. On the form, enter the goal or target that you want to associate to the project in the **Primary goal** and **Primary target** fields respectively.

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Work / Planning item	Plugin required	Role required	Steps to associate the primary goal
Demand	PPM Standard	demand_manager	**1.** Open the required demand. **2.** On the form, enter the goal or target that you want to associate to the demand in the **Primary goal** and **Primary target** fields respectively.
Program	PPM Standard	program_manager	**1.** Open the required program. **2.** On the form, enter the goal that you want to associate to the program in the **Primary goal** and **Primary target** fields respectively.
Feature	Agile Development 2.0	rm_feature_admin	**1.** Open the required feature. **2.** On the form, enter the goal or target that you want to associate to the feature in the **Primary goal** and **Primary target** fields respectively.
SAFe Feature	Scaled Agile Framework	safe_art_user or safe_admin	**1.** Open the required feature. **2.** On the form, enter the goal or target that you want to associate to the feature in the **Primary goal** and **Primary target** fields respectively.
Scrum Epic	Agile Development 2.0	scrum_story_creator	**1.** Open the required epic. **2.** On the form, enter the goal or target that you want to associate to the epic in the **Primary goal** and **Primary target** fields respectively.
SAFe Epic	Scaled Agile Framework	safe_art_user	**1.** Open the required epic. **2.** On the form, enter the goal or target that you want to associate to the epic in the **Primary goal** and **Primary target** fields respectively.
Planning item (Project, Demand, and Scrum/SAFe Epic)	Strategic Planning	sn_align_core.apw_user	**1.** Open the required planning item. **2.** On the form, enter the goal or target that you want to associate to the planning item in the **Primary goal** and **Primary target** fields respectively.

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Goal Framework and Goal Framework for SPM reference

Reference information to provide additional details about Goal Framework and Goal Framework for SPM such as the fields, user roles, and tables.

Components installed with Goal Framework and Goal Framework for SPM

Several types of components are installed with the installation of the Goal Framework and Goal Framework for Strategic Portfolio Management (SPM) applications, including user roles, scheduled jobs, tables, and scripts.

Roles installed

Role	Description	Contains roles
sn_gf.goal_user_read	Can view the goals. This role can be given to users such as the project user and demand user.	None
sn_gf.goal_user	• Can create, view, edit, and delete goals, sub-goals, and associated targets. **Note:** ◦ A goal or sub-goal can be deleted only by the owner and contributors of the goal or its immediate parent goal when the **sn_gf.allow_goal_deletion** system property is set to **Yes**. ◦ An associated target can be deleted only by the owner and contributors of the target or its goal when the **sn_gf.allow_goal_deletion** system property is set to **Yes**. ◦ A goal can be edited only by the owner and contributors of the goal or its immediate parent goal. ◦ A target can be edited only by the owner and contributors of the target or its goal. • Can remove the existing goal relationships between work item and goal, from	sn_gf.goal_user_read

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Role	Description	Contains roles
	the Goal Relationship [sn_gf_goal_m2m_relationship] table.	
sn_gf.goal_admin	• Can update the goal preferences. • Can create target sources and context variables as part of enabling the target automation feature. **Note:** Creating target sources and context variables is available when Goal Framework for SPM is installed.	• sn_gf.goal_user_read • sn_gf.goal_user
sn_gf.strategy_planner_read	Can view all strategic plans and strategic values.	None
sn_gf.strategy_planner	Can create, view, edit, and delete strategic plans and strategic values. **Note:** • A strategic plan can be edited only by the owner and sponsor of the strategic plan. • A strategic value can be edited only by the sponsor of the strategic plan.	sn_gf.strategy_planner_read
sn_gf.epmo_strategy_planner	Can create, view, edit, and delete any goal.	• sn_gf.goal_user_read • sn_gf.goal_user • sn_gf.goal_admin • sn_gf.strategy_planner

Scheduled jobs installed

Goal Framework scheduled jobs

Scheduled job	Description
Migrate Goal, Strategy, and Work item data to the Goal Framework and related Planning item tables	Migrates the existing goals data to the Goal Framework tables. For information on what data is migrated and how the data can be migrated, see goal data migration.

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Goal Framework scheduled jobs (continued)

Scheduled job	Description
Migrate goal relationships for assigned entities	(For Strategic Planning users) Populates the fields, **Assigned entity type** and **Assigned entity** on the Goal form based on the data in the Goal Relationship [sn_gf_goal_m2m_relationship] table if you have created m2m relationship with lens entities other than **Company**, **Business Unit**, **Department**, and **Portfolio**.

Goal Framework for SPM scheduled jobs

Scheduled job	Description
Update Actual value of the targets using Goal Framework for SPM	Updates the actual value of the targets by collecting the data from the respective target sources, so that the progress of the targets is updated and then the targets' progress is rolled up to the goals.

Tables installed

Goal Framework tables

Display name [Table name]	Description
Goal [sn_gf_goal]	Stores the goal details.
Goal Core [sn_gf_core_goal]	Stores the core (basic) details for the goal. The Goal [sn_gf_goal] table extends the Goal Core [sn_gf_core_goal] table.
Target [sn_gf_goal_target]	Stores the target details for the goal.
Units [sn_gf_units]	Stores the available units for measuring the progress of targets.
Target Progress [sn_gf_goal_target_progress]	Stores the target progress details for the goal.
Goal Relationship [sn_gf_goal_m2m_relationship]	Defines the relationship between a goal and items (Project, Demand, Program, Scrum Epic, Scrum Feature, and Planning item).
Strategic Plan [sn_gf_strategic_plan]	Stores the strategic plans defined for each planning organization hierarchy. **Note:** This table is visible only when Alignment Planner Workspace (APW) is installed.

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Goal Framework tables (continued)

Display name [Table name]	Description
Strategic Priority [sn_gf_strategy]	Stores the strategic priorities defined for the organization.
Strategy Value [sn_gf_strategy_value]	Stores the strategic values for strategic plans. **Note:** This table is visible only when APW is installed.

Goal Framework for SPM tables

Display name [Table name]	Description
Context Variable [sn_gfa_context_variable]	Stores the context variable details for the target source.
Target Breakdown [sn_gfa_target_breakdown]	Stores the target breakdown details for the target that were created based on the breakdown intervals specified for the target.
Target Source [sn_gfa_target_source]	Stores the target source configuration details for automating the actual value of the targets.

Custom scripts installed

Goal Framework for SPM custom scripts

Name	Description
Benefit Plans A target source with predefined script.	Predefined script that updates the **Actual value** field on the target form by fetching the required value from the **Actual benefit** field or **Non-monetary actual benefit** field from the monetary or non-monetary benefit plan records. For the script template, see Target automation script for benefit plans. **Note:** You can use the Benefit Plans custom script only when PPM Standard (Project Portfolio Management) is installed.

System properties installed

Goal Framework system properties

Name	Description
sn_gf.allow_goal_deletion	Option to enable deletion of goals. The default value is true.
sn_gf.allow_target_deletion	Option to enable deletion of targets. The default value is true.

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Goal Framework system properties (continued)

Name	Description
sn_gf.goal_calendar_type	Option to set calender type for setting goals. The available calendar types are Gregorian Calendar and Fiscal Period. The default value is Gregorian Calendar.
sn_gf.weighted_average_enabled	Option to enable the weighted average logic to calculate the progress of goals from their subgoals and targets.

Goal Framework for SPM system properties

Name	Description
sn_gfa_disable_target_breakdown	Option to enable the target breakdowns feature at the instance level. The default value is false.
sn_gfa.target_breakdown_decimals	Option to define the number of decimals to show for target values while generating the target breakdowns. The default value is 2.
sn_gfa.weeklyCheckInDayToMapMonth	Option to define end day of the week for weekly target breakdowns mapping to month. The default value is Friday.

Context Variable form

Use the Context Variable form to create a context variable for a target source for calculating the actual value of the target based on the configured input values.

Context Variable form

Field	Description
Type	Context variable type. For information about the different field types, see Field types.
Application	Name of the application scope.
Label	Name of the label that the context variable type is created for.
Column name	ID of the context variable for which the context variable type is created.
Choice List Specification	Option to display the context variables on the Target form in the Actual Value Source Configuration section.
Default value	Default value to consider for updating the actual value of the target.

Goal Assigned Entity Configuration form

Use the Goal Assigned Entity Configuration form to configure a table for an assigned entity type so that the goal user can associate goals with the required assigned entity.

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Goal Assigned Entity Configuration form

Field	Description
Assigned entity table	Entity table that a goal is assigned to.
Application	Name of the application scope.
Assigned entity field	Reference field on the goal form.

Goal form

Use the Goal form to create goals for your organizational strategic priorities.

Note:
For ESG Workspace and Strategic Planning users, to view the other fields (that are not added to the default or your custom form view) on the form in the workspace, configure the default/custom form layout. For information on how to configure the form layout, see Configuring the form layout.

Goal form

Field	Description
Name	Name of the goal.
State	State of the goal. The state can be **Draft**, **In progress**, **Approved**, **Complete**, **Pending**, **Achieved**, or **Not Achieved**.
Parent goal	Name of the parent goal that this goal contributes to.
Strategic priority	Name of the strategic priority that this goal is created for.
Start date	Start date for the goal. By default, the start date of the current quarter is populated. For a sub-goal, start date of its parent goal is populated.
End date	End date for the goal. By default, the end date of the current quarter is populated. For a sub-goal, the end date of its parent goal is populated.
Owner	Owner of the goal. By default, the name of the user creating the goal is populated.
Category	Category of the goal. The available options are: • **Total Applications** • **Total Cost** • **Opex** • **Capex** • **Cloud Applications** • **Homegrown Applications** • **Support Cost** • **Labor Cost** • **Standards Compliance** • **Strategic**

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Goal form (continued)

Field	Description
	• **Operational** • **Tactical**
Status	Status of the goal. Status can be **Red**, **Yellow**, **Green**, or **None**.
Contributors	Users who contribute to the achievement of the goal.
Team	Assignment group responsible for different activities in achieving the goal.
Impact on parent goal	A numerical value that represents the importance of this goal relative to sibling goals or other goals under its parent goal. By default, the value is (1) Neutral. The available options are: • **(0) No impact** • **(1) Neutral** • **(2) Moderate** • **(3) High** • **(4) Very high** • **(5) Maximum** **Note:** This field is available only when the **sn_gf.weighted_average_enabled** system property is set to **Yes**.
Progress	Percentage complete for the goal. The progress value is calculated automatically if the goal has sub-goals or/and targets. For more information on how the progress value is calculated, see Progress value calculation.
Assigned entity type	Entity type to which the goal is assigned. For example, Business Unit, Department, Company, or Portfolio.
Assigned entity	Entity to which the goal is assigned.
Comments	Detailed comments for the goal to facilitate collaboration.
Classification	Goal classification type. The available options are **Environmental**, **Social**, and **Governance**. This field is applicable only for the ESG Workspace users.

Goal/Target Relationship form

Use the Goal/Target Relationship form to create a relationship between a goal and planning item, strategic item, or any other item.

Note:
If Goal Framework for SPM is not installed, the form name appear as Goal Relationship.

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Goal/Target Relationship form - Fields for planning and strategic item

Field	Description
Planning item type	Type of planning item.
Planning item	Planning item with which a goal relationship is created with the goal.

Goal/Target Relationship form - Fields for planning and strategic item - Fields for an item (that is of entity type, Product Model)

Field	Description
Table	Name of the reference table.
Document ID	Document ID of the column from the selected reference table. The suggested values in this field depend on the reference table selected in the **Table** field.

Goal Preferences form

Use the Goal Preferences form to manage goals such as the calendar type used for goal setting, weighted average calculation for goal progress, and deletion of goals and targets.

Goal Preferences form

Property	Description
Enable the weighted average logic to calculate the progress of goals from their sub-goals and targets.	When enabled, the fields, **Impact on parent goal** and**Impact on goal** appear in the Goal [sn_gf_goal] and Target [sn_gf_goal_target] tables respectively. The progress value of the parent goal is calculated by applying the Weighted Average logic. The default value is **Yes**. The progress value of a parent goal is calculated based on the progress value and the value defined in the **Impact on parent goal** and**Impact on goal** fields for sub-goals and targets respectively. For more information on how the progress value is calculated, see progress value calculation.
Allow deletion of goals.	Can delete the goals. The default value is **Yes**.
Allow deletion of targets.	Can delete the targets. The default value is **Yes**. **Note:** When you delete a goal, its associated targets (if any) are also deleted even though the **Allow the deletion of targets** property is set to **No**.

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Goal Preferences form (continued)

Property	Description
Calendar type used for setting goals.	Calendar type that is used for setting goals. The available calendar types are Gregorian calendar and Fiscal period. The default value is **Gregorian calendar**.
Disable target breakdowns at the instance level.	Can disable the target breakdowns feature. When the feature is enabled, target breakdowns are automatically created based on the breakdown interval set for the target. The default value is false.

Progress value calculation

The progress or percentage complete value of goals is auto-calculated using different formulas. The formula depends on whether the goal has only targets, a combination of sub-goals and targets, and if it has weighted average calculation enabled.

Scenario	Formula used to calculate the progress value of the goal
• The goal has targets. • The goal doesn't have sub-goals. • The **Impact on goal** field is defined for targets.	`Progress value of the goal = Sum of progress values of its associated targets / number of targets`
• The goal has sub-goals and targets. • The **Impact on parent goal** and **Impact on goal** fields are defined for sub-goals and targets respectively.	`Progress value of the goal = Sum of progress values of its sub-goals and associated targets / number of sub-goals and targets`
• The goal has two targets (target 1 and target 2). • The goal doesn't have sub-goals. • The **Impact on goal** field is defined for targets and the **sn_gf.weighted_average_enabled** system property is set to **Yes**.	`Progress value of the goal = [(Progress of target 1 * Weight scale of target 1) + (Progress of target 2 * Weight scale of target 2)] / (Weight scale of target 1 + Weight scale of target 2)`
• The goal has two targets (target 1 and target 2). • The goal has two sub-goals (sub-goal 1 and sub-goal 2). • The **Impact on parent goal** and **Impact on goal** fields are	`Progress value of the goal = [(Progress of sub-goal 1 * Weight scale of sub-goal 1) + (Progress of sub-goal 2 * Weight scale of sub-goal 2) + (Progress of target 1 * Weight scale of target 1) + (Progress of target 2 * Weight scale of target 2)] / (Weight scale of sub-goal 1 +`

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Scenario	Formula used to calculate the progress value of the goal
defined for sub-goals and targets respectively and the **sn_gf.weighted_average_enabled** system property is set to **Yes**.	`Weight scale of sub-goal 2 + Weight scale of target 1 + Weight scale of target 2)`

Consider a scenario where a goal (G1) has two targets (T1 and T2) and the **Impact on goal** field for T1 and T2 is set to 2 and 3 respectively. The current Progress values of T1 and T2 are 40% and 20% respectively. In this case, the progress value for G1 is calculated as follows:

- Contribution of T1 towards G1 progress = 2/(2+3)*40 = 16%
- Contribution of T2 towards G1 progress = 3/(2+3)*20 = 12%
- Therefore, Progress of G1 = 16% +12% = 28%

Scheduled Script Execution form

Scheduled Jobs are automated pieces of work that can be performed at a specific time or on a recurring schedule.

Migrate Goal, Strategy, and Work item data to the Goal Framework and related Planning item tables

Use the **Migrate Goal, Strategy, and Work item data to the Goal Framework and related Planning item tables** job to migrate the existing goals data to the Goal Framework tables.

Scheduled Script Execution form

Parameter	Description
migrateGoalData	• Migrates all existing goal records from the Goal [goal] table to the Goal [sn_gf_goal] table. The sys_id remains the same. The corresponding target records will be created in the Target [sn_gf_goal_target] table. • Creates the existing relationship between the goal and work items (Project, Demand, Program) in the Goal Relationship [sn_gf_goal_m2m_relationship] table with the first goal (from the order in the glide list) as the primary goal.
migrateStrategyData	Migrates all existing strategy records from the Enterprise Strategy [enterprise_strategy], Business Unit Strategy [business_unit_strategy], and Strategic Objective [strategic_objective] tables to the Strategic Priority [sn_gf_strategy] table. The sys_id remains the same.
migratingGoalStrategyM2Mdata	In Goal Framework, a goal can be mapped to only one strategy. If an existing goal has two strategies mapped to it, a clone of the goal will be created (one as a generic goal and another as a sub-goal) with the same strategy populated for both. And, for the sub-goal, the first goal will be set as the parent goal. For example, consider a scenario where an existing goal (G1) is mapped to five strategies (S1, S2, S3, S4, and S5).

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Scheduled Script Execution form (continued)

Parameter	Description
	Then, four clones of G1 will be created as sub-goals (G2, G3, G4, and G5) and the parent goal is populated as G1. For the parent goal (G1) and the sub-goals (G2, G3, G4, and G5), the **Strategy** field is populated respectively (S1, S2, S3, S4, and S5). **Note:** The name of the cloned sub-goal will be prefixed with `Cloned SubGoal:`, followed by the parent goal name.
migrateStrategyWorkItemRelData	• Migrates the existing relationship of strategy and work items (Project, Demand, Program) to the Goal Relationship [sn_gf_goal_m2m_relationship] table. • If a goal doesn't have an association between the strategy (as current strategy) and the work item in the Goal Relationship [sn_gf_goal_m2m_relationship] table, a dummy goal will be created with a strategy value of current strategy. And, a goal relationship is created with the dummy goal and the work item in the Goal Relationship [sn_gf_goal_m2m_relationship] table. **Note:** The name of the dummy goal will be prefixed with `Goal:`, followed by the strategy name.

Migrate goal relationships for assigned entities

Use the **Migrate goal relationships for assigned entities** job to populate the fields, **Assigned entity type** and **Assigned entity** on the Goal form based on the existing values in the legacy fields, **Business Unit**, **Department**, **Company**, **Portfolio**, and any customized entity field.

Scheduled Script Execution form

Parameter	Description
Migrate goal relationships for assigned entities	(For Strategic Planning users) Populates the fields, **Assigned entity type** and **Assigned entity** on the Goal form based on the data in the Goal Relationship [sn_gf_goal_m2m_relationship] table if you've created an m2m relationship with lens entities other than **Company**, **Business Unit**, **Department**, and **Portfolio**. If users had already created m2m relationship, they may use this script to move those relationships from the m2m table to the goals table to access and manage those goals in the respective portfolio plans. If the goal has only one relationship with an assign entity table type, the **Assign entity type** and **Assign entity** fields are populated on the Goal [sn_gf_goal] table based on the Goal Relationship [sn_gf_goal_m2m_relationship] table. If the goal has multiple relationships with an assign entity table type, number of relationships (n) cloned sub-goals will be created and the **Assign entity type**

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Scheduled Script Execution form (continued)

Parameter	Description
	and **Assign entity** fields are populated on the Goal [sn_gf_goal] table based on the data in the Goal Relationship [sn_gf_goal_m2m_relationship] table for each cloned sub-goal.

Strategic Plan form

Use the Strategic Plan form to define the purpose of your organization, its strategic priorities, and the associated goals.

Strategic Plan form

Field	Description
Name	Name of the strategic plan.
Sponsor	Sponsor for the strategic plan.
Start date	Start date for the strategic plan.
End date	End date for the strategic plan.
Description	A detailed description of the strategic plan.
Vision	A brief description about where your organization's business will be at some point in the future, based on its strategies and associated goals.
Mission	A brief description about what your organization's objectives are and its approach to reach those objectives.

Strategic Priority form

Use the Strategic Priority form to orient your organization strategic plan toward your goal.

Strategic Priority form

Field	Description
Name	Name of the strategic priority.
Parent	Name of the parent strategic priority that this strategic priority contributes to.
Owner	Owner of the strategic priority. By default, the name of the user creating the strategy is populated.
Start date	Start date for the strategic priority.
End date	End date for the strategic priority.
Type	Strategic priority type categorizes the strategic priority by its nature and organizational intent. Classifying priorities by type helps your organization distinguish different focus areas within a strategic plan and align goals across different dimensions of your strategy. The available options are: • **Key Initiative** • **Shared Vision**

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Strategic Priority form (continued)

Field	Description
	• **Strategic Target** • **Operating Principle** • **Relationship Strategy** • **Environmental** • **Social** • **Governance** • **Artificial Intelligence**
Strategic Plan	Name of the strategic plan for which this strategic priority is created.
Description	A detailed description of the strategic priority.

Target automation script for benefit plans

Use the predefined Benefit Plans script as a target source to automate the actual value of your targets from the benefit plans of relevant work items.

Use the following predefined benefit plans script to configure the target source for your targets. The script fetches the required data for monetary or non-monetary benefit plans and updates the actual value for the target. You can use this script as is or you can also modify it according to your requirement. You can also create context variables and configure them for this target source (Benefit Plans).

```
result = '';
var benefitPlans = new
 GlideRecord(sn_gfa.GFAdvancedConstants.BENEFIT_PLAN_TABLE);
benefitPlans.addQuery('sys_id', 'IN', benefit_plan);
benefitPlans.query();

var nonMonetaryBenefitSum = 0;
var monetaryBenefitSum = 0;
var hasMonetary = false;
var hasNonMonetary = false;
while (benefitPlans.next() && !(hasMonetary && hasNonMonetary))
 {
    if (!gs.nil(benefitPlans.getValue('currency'))) {
        monetaryBenefitSum +=
 parseInt(benefitPlans.getValue('actual_benefit'));
        hasMonetary = true;
    } else {
        nonMonetaryBenefitSum +=
 parseInt(benefitPlans.getValue('nm_actual_benefit'));
        hasNonMonetary = true;
    }
}

if (hasMonetary && hasNonMonetary)
    gs.addErrorMessage(gs.getMessage('The Benefit Plan list can
 contain either monetary or non-monetary benefit plans.'));
else
```

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```
   result = hasMonetary ? monetaryBenefitSum :
nonMonetaryBenefitSum;
```

Target Breakdown form

Use the Target Breakdown form to track and measure the progress of the target and its goal.

The form is available when the Goal Framework for SPM application is installed.

Target Breakdown form

Field	Description
Breakdown period	Period of the target breakdown.
Parent breakdown	Year of the target breakdown.
Target	Parent target of the target breakdown.
Status	Status of the target breakdown. The status can be **Red**, **Yellow**, or **Green**.
Breakdown	Breakdown interval specified in the parent target.
Planned target	Target value for the target breakdown.
Actual	Actual value for the target breakdown.
Remark	Remark entered by the user for business justification when updating the actuals.

Target form

Use the Target form to track and measure the progress of the goals.

Some of the fields on the form is available when the Goal Framework for SPM application is installed.

Note:
For ESG Workspace and Strategic Planning users, to view the other fields that aren't added to the default view or your custom form view on the form in the workspace, configure the default or custom form layout. For information on how to configure the form layout, see Configuring the form layout.

Target form

Field	Description
Name	Name of the target.
Goal	Name of the associated goal. This field is auto-populated when creating a target from the Targets related list on the Goal form.
Description	Brief description of the target.
State	State of the target. The state can be **Draft**, **In progress**, **Approved**, or **Complete**.
Status	Status of the target. The status can be **Red**, **Yellow**, or **Green**.
Progress	Percentage of target execution that is complete. The value is calculated automatically.

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Target form (continued)

Field	Description

	If the **Type** field is set to **Maximize**, the progress value is calculated using the following formula.
	`Progress = (Actual value - Base value) / (Target value - Base value) x 100`
	If the **Type** field is set to **Minimize**, the progress value is calculated using the following formula.
	`Progress = (Base value - Actual value) / (Base value - Target value) x 100`
	For more information on how the progress value is calculated when weight scale is defined, see progress value calculation.

Impact on goal	A numerical value that represents the importance of the target relative to the other targets of the goal. If there are any sub-goals present, they are also considered for relative weights and consequent progress calculation. By default, the value is (1) Neutral. The available options are: • **(0) No impact** • **(1) Neutral** • **(2) Moderate** • **(3) High** • **(4) Very high** • **(5) Maximum** **Note:** This field is available only when the **sn_gf.weighted_average_enabled** system property is set to **Yes**.
Owner	Owner of the target. By default, the name of the user creating the target is populated.
Contributors	Users who contribute to the achievement of the target. By default, the contributors of the associated goal are populated.

Duration section of the Target form

Field	Description
Start date	Start date for the target. By default, the start date of its associated goal is populated.
End date	End date for the target. By default, the end date of its associated goal is populated.

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Metrics section of the Target form

Field	Description
Unit of measure	Measure type for the specified value. Usage of the measure such as cost, time, and rate. The available measure types are stored in the Units [sn_gf_units] table. Unit of measure defines the type of the target as qualitative or quantitative. The available unit of measures for quantitative target are **#**, **$**, **%**, and **Days**. The available unit of measure for qualitative target is **Yes/No**.
Type	Target type that signifies the direction of achievement. • **Maximize**: The direction of the progress is toward the target value from the base value where the base value must be less than the target value. • **Minimize**: The direction of the progress is toward the target value from the base value where the target value must be less than the base value. • **Milestone**: Fixed type. Only the qualitative target values are allowed (that are set in the **Unit of measure** field for the target) to capture the achievement of the target. The **Milestone** option is applicable only for qualitative targets. The **Type** field becomes read-only with the value populated as **Milestone** for qualitative targets (when the **Unit of measure** field is set to a qualitative target value).
Start value	Start value of the target. The start value can also be considered as the present or current value. This field becomes read-only when a value is entered in the **Actual value** field. Clear the **Actual value** field to update a value in the **Base value** field. This field is available when the **Type** field is set to **Maximize** or **Minimize**.
Final target value	Final target value of the target. The target value should be aspirational and should challenge the teams. This field is available when the **Type** field is set to **Maximize** or **Minimize**.

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Metrics section of the Target form (continued)

Field	Description
Baseline reference	Past achievement of the target to provide reference for future performance. This value is only for reference purpose and not considered for target progress calculation.
Actuals to date	Actual value of the target at a given time. This field is available when the **Type** field is set to **Maximize** or **Minimize**.
Check-in frequency	Option to specify breakdown intervals for the target and how frequently the owner or contributor should update the actual value of the target. Breaking down the target into smaller periods helps you set a target for smaller periods and focus on the specific breakdown targets. The available options are **Daily**, **Weekly**, **Monthly**, **Quarterly**, and **Yearly**. Target breakdowns are automatically created when you set this field to any of the available options other than **None**. For more details on target breakdowns, see Target breakdowns in Strategic Planning. **Note:** The target breakdowns feature isn't supported for qualitative targets.
Target value distribution	Option to specify the target to be calculated cumulatively or non-cumulatively. The available options are **Split equally across the time period (non-cumulative)** and **Spread linearly across the time period (cumulative)**. This field is available only when the **Check-in frequency** field is set to any of the available options other than **None**.
Remark	Remark entered by the user for business justification when updating the actuals.
Check-in due date	Due date that the owner or contributor of the target must update the actual value of the target to.
Confidential	Option to restrict the access for this target record to the specific users populated in the **Allowed groups** and **Allowed users** fields. This field is available when the ESG Management application is installed and the *sn_grc.enable_record_confidentiality* property is enabled. This field is applicable only when the **Classification** field in the

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Metrics section of the Target form (continued)

Field	Description
	goal form of the target is populated as Environmental, Social, or Governance. The required role to configure this field is sn_esg.reader. **Note:** Irrespective of the target record set to confidential or not, the target progress value rolls up to its goal for calculating the progress value of the goal.
Allowed groups	User groups who can access the target record. This field is applicable only for the ESG Workspace users. Even though a user group is populated in this field, the users can access the confidential record only if the user group has the sn_esg.reader role. This field is available when the **Confidential** field is set to **true**.
Allowed users	Users who can access the target record. This field is applicable only for the ESG Workspace users. Even though a user name is populated in this field, the user can access the confidential record only if the user has the sn_esg.reader role. This field is available when the **Confidential** field is set to **true**.
Comments	Detailed comments for the target to facilitate collaboration.

Target Automation section of the Target form

Field	Description
Automate actual value	Option to enable the target automation feature for the target.
Actual value source	Target source table that the data is fetched from to auto-update the actual value of the target on the target's review due date. This field is available when the **Automate actual value** field is set to **true**.

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Variables section of the Target form

This section appears based on the context variables available in the target source that is selected in the **Actual value source** field.

When you select Actual value source as Benefit Plans (predefined target automation script for benefit plans), the **Benefit Plan** field appears in this section, from which you can select the required benefit plans for automating the actual value of the target.

Note:
You can use the Benefit Plans custom script only when PPM Standard (Project Portfolio Management) is installed. If you can't find the benefit plan that you want to select, you can find and select the same from Heisenberg UI by navigate to **Enterprise Goal Management** > **Targets** and opening the Target form.

Target Source form

Use the Target Source form to create and configure a source for your targets so that the actual value of the target is auto-updated.

Target Source form

Field	Description
Name	Name of the target source.
Active	Option to activate this target source for use.
Type	Type of target source. Available options: • **Assessment/Survey** • **PA Indicator** • **Custom script**
Advanced	Enables the **Custom script** option for the target source type **Assessment/Survey** with the pre-defined script. This field is available when the **Type** field is set to **Assessment/Survey**.
Assessment metric type	Assessment metric type for the target source. **Tip:** A context variable is automatically created for the target source if the field is populated with a metric type of Evaluation method = Assessment. This field is available when the **Type** field is set to **Assessment/Survey**.
Assessment metric category	Assessment metric category for the assessment metric type. This field is available when the **Type** field is set to **Assessment/Survey**.
Description	Brief description of the target source.
PA Indicator	PA Indicator for the target source. This field is available when the **Type** field is set to **PA Indicator**.
Breakdown	Breakdown for the PA Indicator.

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Target Source form (continued)

Field	Description
	This field is available when the **Type** field is set to **PA Indicator**.
Custom script	Custom script to fetch the required data from any ServiceNow AI Platform table for the target source. This field is available when the **Type** field is set to **Custom**. Or, when the **Type** field is set to **Assessment/Survey** and the **Advanced** field is set to **true**.

Domain separation and Goal Framework

Domain separation is supported for Goal Framework and Goal Framework for SPM. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

How domain separation works in Goal Framework and Goal Framework for SPM

After you enable domain separation on your ServiceNow instance, the Goal Framework and Goal Framework for SPM data is automatically domain separated. The goals and targets data of portfolio plans for different domains are visible to only those users who have access to these domains.

Data Separation

The ServiceNow® Data Separation application helps organizations restrict access to sensitive data based on a lens hierarchy and its leaf node.

Note:
This application is no longer deployed, enhanced, or supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Alternatively, you can use Data Filters and access control lists (ACLs) to configure data separation for your use cases. For details on how to enable data separation for different use cases using data filters and ACLs, see the Managing data separation using data filters and ACLs [KB0558290] article in the Now Support Knowledge Base.

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Data separation supports records, related items, planning consoles, workbenches, and reports.

Note:
Currently, data separation is supported only for ServiceNow® Project Portfolio Management.

Alternatively, you can define data filters along with other configurations to restrict access to sensitive data (enable data separation). For details on how to enable data separation for different use cases using data filters and ACLs, see the Managing data separation using data filters and ACLs [KB1772519] article in the Now SupportKnowledge Base.

Get started

Explore  Learn about Data Separation features.	Configure  Learn how to configure Data Separation for restricting the sensitive data.	Reference  Get details about components like fields, tables, roles, and properties.
Supported tables  See the list of tables that are supported for Data Separation.	Limitations  See the limitations of Data Separation.	

Troubleshoot and get help

- Ask or answer questions in the Strategic Portfolio Management forum on the ServiceNow Community.
- Search the Known Error Portal for known error articles. For more information, see Search the Known Error Portal for known error articles.
- Contact Customer Service and Support. For more information, see Contact Customer Service and Support.

Exploring Data Separation

Learn about the features, configuration, and benefits that Data Separation provides.

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Data Separation overview

Data Separation helps you restrict data in ServiceNow® Strategic Portfolio Management based on a lens hierarchy and its leaf node. The leaf node is the bottom-level entity in a lens hierarchy. For example, if the Organization lens is used for data separation, the leaf node would be Department for the base system lens.

You can enable Data Separation on select Demand, Project, Resource Plan, and Cost Plan entities, as needed. Also, you can enable Data Separation on select Cost Plan Breakdown and Project Task related entities.

Data Separation supports records, related items, planning consoles, workbenches, and reports.

Note:
Access control list (ACL) and query Business Rule (BR) limitations apply even when Data Separation is enabled. For example, reports with aggregate numbers may not be data separated.

Data Separation applies even on child projects and sub-tasks based on the Data Separation that is configured for the parent project or task.

Data Separation key components

- Hierarchy: Defines the hierarchy for enabling Data Separation using a lens and its leaf node.
- Supported Entities: Enables Data Separation on select entities and related entities, as needed.
- Entity-Group Mapping: Defines entity-group mappings between a business area and user group.

Features

You can use the Data Separation features to do the following:

- Configure a data separation hierarchy using a lens hierarchy and its leaf node.
- Enable data separation on select entities and related entities, as needed.
- Create as many entity group mappings as required to restrict data to specified user groups.
- Grant access for the users who always need access to sensitive data by assigning the data separation privileged user (sn_ds.ds_privileged_user) role.

How Data Separation works

The following is the process flow for restricting access to the sensitive data in Strategic Portfolio Management using Data Separation.

- A lens is selected for defining a hierarchy for Data Separation. The Data Separation admin can modify the hierarchy of the lens for data separation as needed.
- The required entities and related entities are enabled for Data Separation.
- An entity group mapping is created for each business group (where the business group could be a business unit, department, or company) that defines the set of users that the access is restricted to.
- The data of the business group is then restricted for the enabled entities only to the users that are part of the user group populated in the entity-group mapping record.

Examples data separation

Example 1

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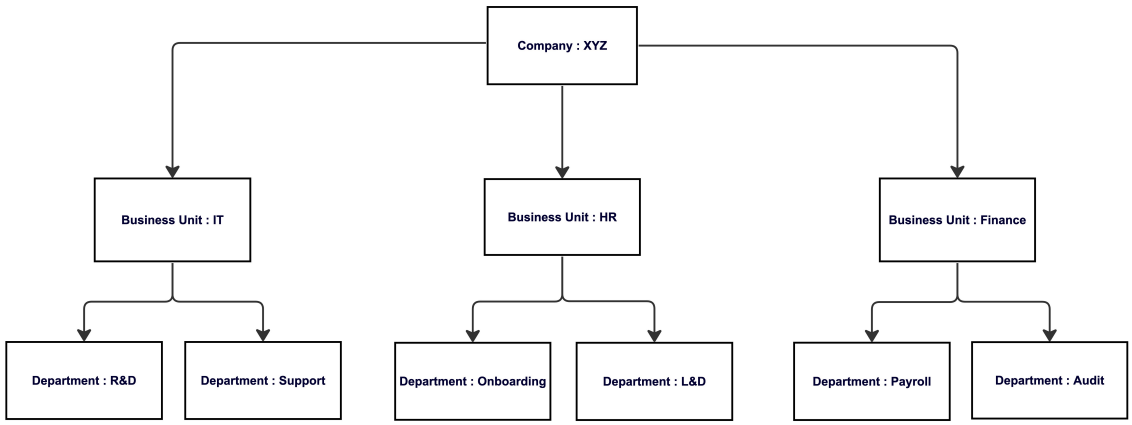
Consider a scenario where:

- The Data Separation hierarchy is defined using the Organization lens and the lens structure is Company, Business Unit, and Department (from top-to-bottom).
- The entity mapping is created for the HR department (Department : HR) with the group HR leads.
- Data Separation is enabled for the Demand and Project entities.

In this case, no user can access the project and demand records of the HR department except the users that are part of the HR leads group. However, all users (based on the ACLs that the user currently has) can access other records (for example, the resource plan and cost plan) of the HR department.

Example 2

The Company XYZ has a data separation-enabled lens structure as shown in the following image and wants to restrict data to specific groups based on different use cases. Also, all the supported entities are enabled for Data Separation. The following use cases help you understand how Data Separation works and how to configure Data Separation for different use cases.



- Case 1: Restrict data of the Payroll department to the Payroll managers

  You can restrict data for this case by configuring Data Separation as follows:

  - Create a Payroll managers user group.
  - Create an entity-group mapping for the Payroll department with the lens entity record (Department : Payroll) and the Payroll managers user group.
- Case 2: Restrict data of the HR business unit (both the Onboarding and L&D departments) to the HR leads

  You can restrict data for this case by configuring Data Separation as follows:

  - Create an HR leads user group.
  - Create an entity-group mapping for the HR business unit with the lens entity record (Business Unit : HR) and the HR leads user group.
- Case 3: Restrict data of the entire organization to the Organization leads

  You can restrict data for this case by configuring Data Separation as follows:

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- Create an Organization leads user group.
- Create an entity-group mapping for the Company XYZ with the lens entity record (Company : XYZ) and the Organization leads user group.

Configuring Data Separation

As an administrator, you can install Data Separation and assign the Data Separation roles to the required users.

Configuration workflow

A Data Separation administrator can define Data Separation hierarchy, enable entities, and map user groups for Data Separation.

Guided setup to configure Data Separation

Guided setup provides a sequence of tasks to help you with the required configuration on your ServiceNow instances. After installing Data Separation, navigate to **All** > **Data Separation** > **Guided Setup** to configure Data Separation.

Install Data Separation

You can install the Data Separation application (sn_ds) if you have the admin role.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Data Separation requires the following plugin and store application. Ensure that the following plugin and application is activated before you install Data Separation.

Required ServiceNow plugin

PPM Standard plugin (com.snc.financial_planning_pmo)

Activate the PPM Standard plugin (com.snc.financial_planning_pmo) in your ServiceNow instance before you install Data Separation. For more information see, Activate PPM Standard (Project Portfolio Management).

Required ServiceNow Store application

Portfolio Planning (sn_align_ws)

Install the Portfolio Planning (sn_align_ws) application in your ServiceNow instance before you install Data Separation. For more information see, Install Portfolio Planning.

Role required: admin

About this task

The following items are installed with Data Separation:

- Plugins
- Roles
- Tables

For more information, see Components installed with Data Separation.

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Data Separation application (sn_ds) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you can't find the application, you might have to request it from the ServiceNow Store.

   Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed if they'll be installed, are currently installed, or need to be installed. If any plugins or applications need to be installed, you must install them before you can install Data Separation.
4. Select **Install**.

Assign roles for managing Data Separation

Assign Data Separation roles to user groups and to individual users based on user activities and responsibilities.

Before you begin
Role required: admin

About this task
You can assign roles to individual users or groups. Applying roles to a group gives access to all the members of the group. For more information on roles installed with Data Separation, see the Roles installed table in Components installed with Data Separation.

Procedure

1. Navigate to **All** > **Data Separation** > **Guided Setup**.
2. Select **Get Started**.
3. Select **Assign roles** from the tasks list.
4. Select the required role (sn_ds.ds_admin or sn_ds.ds_privileged_user), select **Configure**, and assign the role to a user or user group.

What to do next
Configure a data separation hierarchy for enabling Data Separation. For more information, see Configure a lens for enabling Data Separation.

Configure a lens for enabling Data Separation

Configure a data separation hierarchy for enabling Data Separation using a lens hierarchy and its leaf node.

Before you begin
Role required: sn_ds.ds_admin

About this task

Note:
Only one lens can be enabled for Data Separation at a time.

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Procedure

1. Navigate to **All** > **Data Separation** > **Hierarchy**.
   The Lenses list view opens with the available lenses for data separation.
2. Open the lens record that you want to use as a hierarchy for configuring Data Separation.
3. On the Lens form, select **Data separation enabled**.
   For a description of the field values, see Lens form.
4. Select **Update** to save the configuration.
5. Navigate to **All** > **Data Separation** > **Hierarchy**.
6. From the Lenses list view, select **Sync data separation** to synchronize the lens configuration for Data Separation.

What to do next

Enable Data Separation on select entities as needed. For more information, see Enable entities for Data Separation.

Enable entities for Data Separation

Enable Data Separation on select entities as needed.

Before you begin

Role required: sn_ds.ds_admin

About this task

You can enable Data Separation on the following entities and related entities.

- Entities:
  - Demand [dmn_demand]
  - Project [pm_project]
  - Resource Plan [resource_plan]
  - Cost Plan [cost_plan]
- Related entities:
  - Cost Plan Breakdown [cost_plan_breakdown]
  - Project Task [pm_project_task]

Procedure

1. Navigate to **All** > **Data Separation** > **Supported Entities**.
   The list opens the entities supported for Data Separation.
2. Open each Supported Entity record that you want to enable Data Separation for.
3. On the form, fill in the fields.

Supported Entity form

Field	Description
Entity	Name of the entity table.
Enable data separation	Option to enable Data Separation for the entity.

4. Select **Update** to save the configuration.

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5. Navigate to **All** > **Data Separation** > **Supported Entities**.
6. From the Supported Entities list view, select **Sync data separation** to synchronize the entity configuration for Data Separation.

Note:
The related Cost Plan Breakdown and Project Task entities can be enabled only if the Cost Plan and Project parent entities are enabled respectively.

What to do next
Map a user group for Data Separation. For more information, see Map a user group for Data Separation.

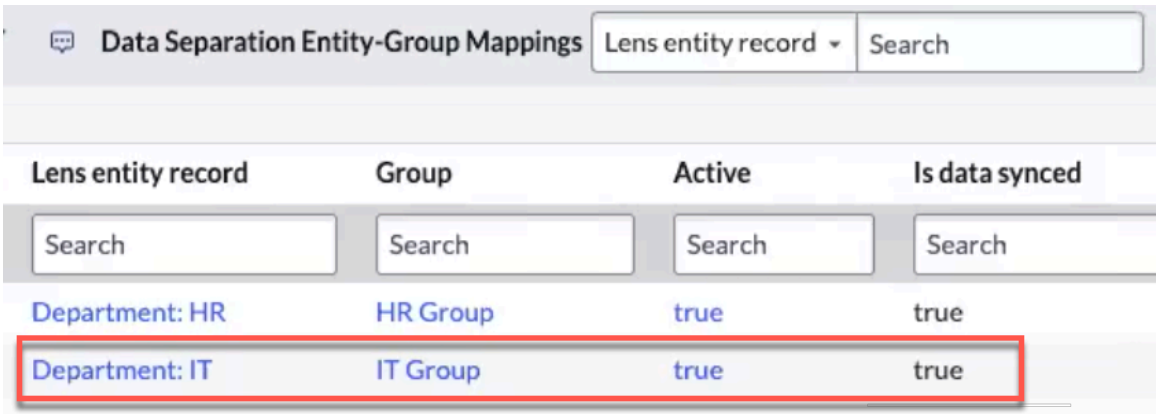
Map a user group for Data Separation

Map a user group for Data Separation to restrict data only to the specified users of a group and sub-groups.

Before you begin
Role required: sn_ds.ds_admin

About this task
You can create only one entity-group mapping per lens entity record.

For example, the following image shows that the leaf node is a Department and that IT is one of the departments. You want to restrict the data of the IT department to a specific group. Then, create an entity-group mapping for the IT department with the required user group.



If you want to grant access to the data of the IT department for more than one group, create a parent user group and add all the other groups as sub-groups under the parent group. Then you can map the parent group in the entity-group mapping record of the IT department.

Note:
If you want to grant access to the data of all departments for a user group, create an entity-group mapping with the parent entity of the department entity. Alternatively, you can also create one entity-group mapping per department for the user group.

Procedure
1. Navigate to **All** > **Data Separation** > **Entity-Group Mappings**.
2. Select **New**.
3. On the Enity-Group Mapping form, fill in the fields.
   For a description of the field values, see Entity Group Mapping form.

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4. Select **Submit** to save the record.
5. Navigate to **All** > **Data Separation** > **Entity-Group Mappings**.
6. From the Entity-Group Mappings list view, select **Sync data separation** to synchronize the entity-group mappings for Data Separation.

Result
The data is restricted to the user group populated in the entity-group mapping record for the enabled entities.

Synchronize Data Separation

Synchronize Data Separation when the configuration is changed in the lens, supported entities, or entity-group mappings tables.

Before you begin
Role required: sn_ds.ds_admin

About this task
The **Is data synced** field value must be **true** for all records of the Data Separation configuration (lens, entities, entity-group mappings) to restrict the data according to the Data Separation configuration. If the **Is data synced** field value for any part of the configuration record is **false**, the data separation isn't synchronized.

The **Is data synced** field value is **false** only when any of the configurations for Data Separation are changed.

Procedure

Perform the following steps to synchronize data separation depending on the type of configuration change made in Data Separation.

For this configuration change	Perform these steps
• Data Separation is turned off on the existing lens and then enabled again on the same lens • Data separation is turned off on the existing lens and then enabled again on another lens	**a.** Navigate to **All** > **Data Separation** > **Hierarchy**. **b.** From the Lenses list view, select **Sync data separation** to synchronize the lens configuration for Data Separation.
Data Separation is enabled or turned off for an entity	**a.** Navigate to **All** > **Data Separation** > **Supported Entities**. **b.** From the Supported Entities list view, select **Sync data separation** to synchronize the entity configuration for Data Separation.

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For this configuration change	Perform these steps
A group is added, removed, or updated for an entity-group mapping record	**a.** Navigate to **All** > **Data Separation** > **Entity-Group Mappings**. **b.** From the Entity-Group Mappings list view, select **Sync data separation** to synchronize the entity-group mappings for Data Separation.

Data Separation reference

Reference information to provide additional details about Data Separation such as the fields, user roles, tables, guidelines, and Data Separation information.

Components installed with Data Separation

Several types of components are installed with activation of the Data Separation plugin, including user roles and tables.

Note:
The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Roles installed

Role	Description	Contains roles
sn_ds.ds_admin	Can create/update/delete records in the tables required to configure the Data Separation feature.	sn_align_core.ap_read_only
sn_ds.ds_privileged_user	Can create/update/delete records of any business function in Strategic Portfolio Management, even when Data Separation is enabled.	None

Tables installed

Display name [Table name]	Description
Supported Entity [sn_ds_data_separation_config]	Stores the entity details (Demand, Project, Resource Plan, Cost Plan, Cost Plan Breakdown, and Project Task) for enabling Data Separation.
Entity-Group Mapping [sn_ds_entity_group_mapping]	Stores the lens entity and user group details for Data Separation.

Data Separation limitations

There are some types of data that Data Separation doesn't work for even when Data Separation is enabled.

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The Data Separation limitations are as follows:

- Data Separation supports only Project Portfolio Management and a subset of the Project Portfolio Management tables.
- Access control list (ACL) and query business rules (BR) apply even when Data Separation is enabled. For example, reports with aggregate numbers may not be data separated.
- Data Separation may have performance impacts to some extent.

Entity Group Mapping form

Learn about the fields of the Entity Group Mapping form. Use this form to define an entity group mapping that enables Data Separation for the selected entity group and user group.

Entity-Group Mapping form

Field	Description
Lens entity table	Name of the lens entity table. For example, Business Unit, Department, or Company.
Active	Indicates if the entity-group mapping is active.
Lens entity record	Brief description of the lens. Entity group on which Data Separation is enabled.
Group	User group that the data of the selected entity is restricted to.

Lens form

Learn about the fields of the Lens form. Use this form to enable data separation based on the lens hierarchy and its leaf node.

Lens form

Field	Description
Name	Name of the lens.
Active	Indicates if the lens is active.
Description	Brief description of the lens. You can indicate the business purpose of this lens and the planning managers that would use this lens.
Planning items	Type of work that can be planned using this lens. Move the desired planning item types from the Available list to the Selected list.
Bottom entity on planning item	Bottom entity in the lens hierarchy.
Data separation enabled	Option to enable data separation using the lens hierarchy.

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Supported tables for Data Separation

Several types of tables are supported for Data Separation, including direct and indirect related tables for each entity.

You can enable data separation on the following entities and related entities.

- Entities:
  - Demand [dmn_demand]
  - Project [pm_project]
  - Resource Plan [resource_plan]
  - Cost Plan [cost_plan]
- Related entities:
  - Cost Plan Breakdown [cost_plan_breakdown]
  - Project Task [pm_project_task]

Domain separation and Data Separation

Domain separation is supported for Data Separation. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

Project Portfolio Management

ServiceNow® Project Portfolio Management (PPM) provides a simplified, team-oriented approach to managing projects, portfolios, their resources and financials by combining several individual applications.

Customers who already have Project Portfolio Management can upgrade to PPM Standard. New customers must purchase PPM Standard.

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Get started

 Innovation Management	 Demand Management	 Project Management
 Resource Management	 Portfolio Management	 Program Management
 Timecard Management	 PPM Analytics and Reporting	 PPM reference

Troubleshoot and get help

- Ask or answer questions in the Strategic Portfolio Management forum on the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Explore Project Portfolio Management

Learn more about Project Portfolio Management (PPM) with a sample workflow and review the benefits it can provide for different users in your organization.

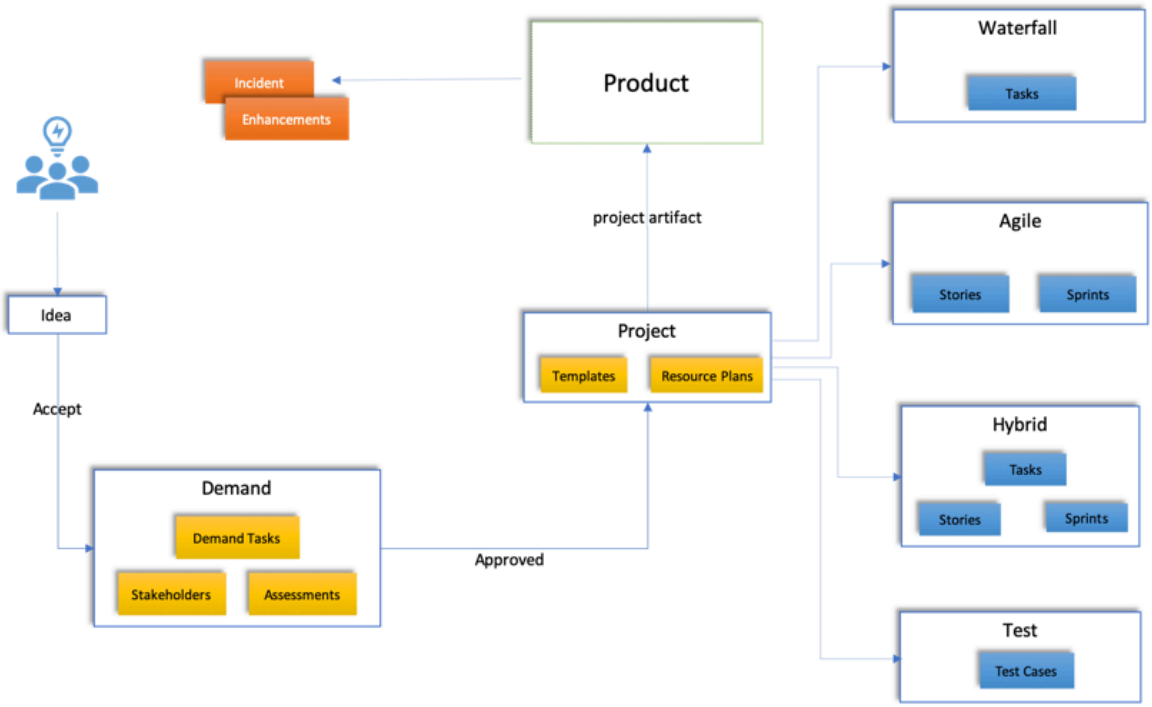
Project Portfolio Management overview

PPM is a collection of multiple applications that help you analyze and approve ideas and demands, convert them to projects and manage them through completion. You can manage resources and financials of individual projects or the ones that are rolled up to a program or portfolio. PPM enables your teams to plan and execute work in traditional waterfall methodology or combine an Agile approach to execute using a hybrid methodology.

Project Portfolio Management workflow

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Project execution in a Waterfall, Agile, or Hybrid approach using PPM



The project manager (project_manager role) includes all the manager roles for the applications included in the PPM suite.

Project Portfolio Management benefits

Benefit	Feature	Users
Gather and evaluate of ideas and promote accepted ideas to demand, story, epic, or project.	Innovation Management	Project Teams, Demand Manager
Assessing, approve, and promote demands to strategic and operational demands.	Demand Management	Demand Manager
Manage projects, tasks, and resources.	Project Management	Project Manager, Project Team
Manage programs, the projects under a program and its tasks.	Program Management	Program Manager
Manage your projects and programs of different portfolios.	Portfolio Management	Portfolio Manager
Create resource plans and request resources.	Resource Management classic	Resource Manager
Track time on a daily basis against tasks	Time Card Management	
Gain visibility into the status and health of programs, projects, and demands.	Project Portfolio Management Platform Analytics Solutions	Project, Program, or Portfolio Manager or Business stakeholder

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Integration with Digital Portfolio Management

Digital Portfolio Management (DPM) provides a unified workspace for owners to view and collectively manage their services and applications through the full life cycle. Installing DPM and Project Portfolio Management enables the integration with Project Management and Demand Management. With this integration, DPM managers can view project data that may impact a business application and create demands on a business application in DPM.

For more information, see Exploring Digital Portfolio Management.

Domain separation

Domain separation provides complete data isolation for domain-specific users. Project Portfolio Management supports domain separation with a few limitations. For more information, see Domain separation and Project Portfolio Management.

PPM Standard (Project Portfolio Management)

The ServiceNow® PPM Standard, earlier known as Project Portfolio Suite with Financials, application integrates Financial Management and Project Portfolio Management.

PPM Standard automatically activates Financial Management if it is not already active.

The integration enables project and portfolio managers to perform the following activities:

- Determine overall cost requirements for all demands and projects in portfolios
- Establish resource requirements and track costs for demands and projects
- Track actual amounts spent compared to an approved budget

Upgrades and new customers

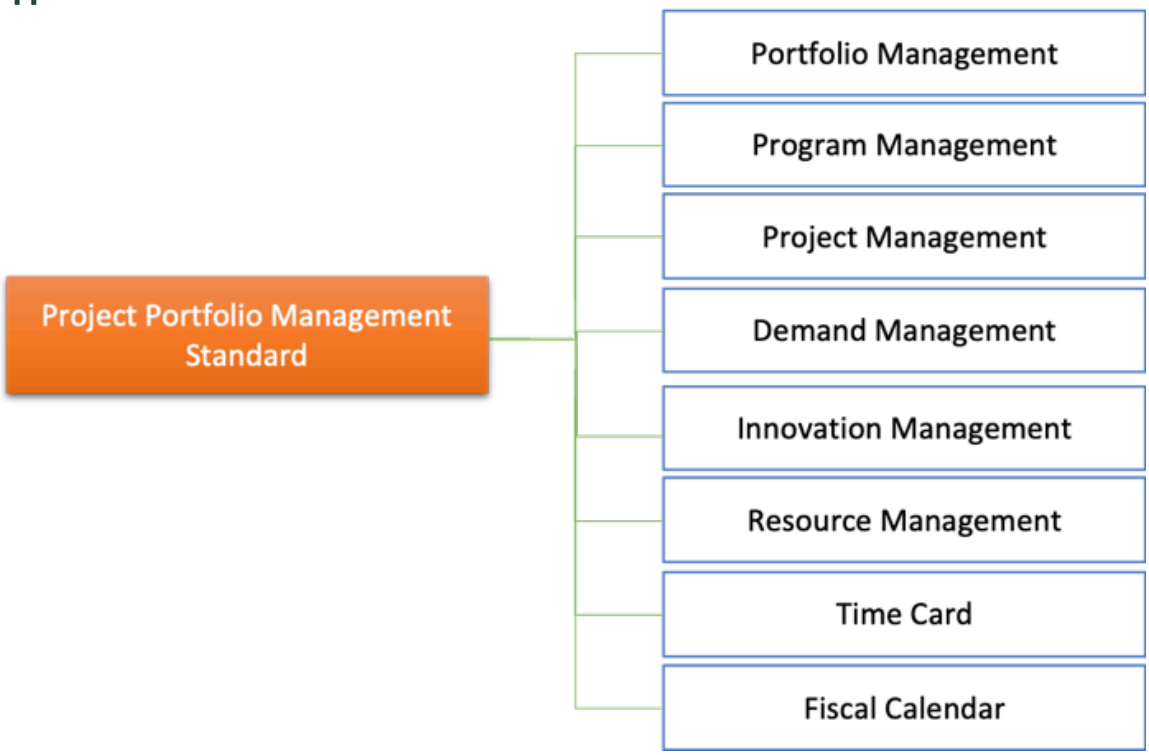
Customers who already have Project Portfolio Suite with Financials can upgrade to PPM Standard. New customers must purchase PPM Standard.

PPM Standard applications

The PPM Standard plugin installs Financial Management and Project Portfolio Suite. The following diagram illustrates the applications that are available.

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Applications installed with PPM Standard



PPM Standard additions

PPM Standard adds the portfolio workbench, that you can use to perform all aspects of financial planning. You can also perform financial planning and budgeting using UI actions on related lists, but the workbench is the preferred method. See for more information. See for information on how to plan end-to-end finances for projects and portfolios, including tracking actual costs and creating budgets as part of the Financial Management application.

Get started with project management

PPM Standard provides comprehensive capabilities for project planning and execution. Use the following topics to get started:

- **Project creation and planning:** Create projects, define work breakdown structures, set milestones, and plan timelines. See the Project Management documentation.
- **Resource management:** Allocate resources to projects, manage capacity, and track utilization. See Resource Management Workspace.
- **Financial planning:** Create cost plans, track budgets, and manage investment funding. See Financial planning for portfolios.
- **Portfolio management:** Prioritize demands, manage portfolios, and track portfolio performance. See Portfolio Management.
- **Installed components:** Review the roles, tables, and configurations installed with PPM Standard. See Roles installed with PPM Standard.

Related topics

Portfolio Management

Financial Management

Project Portfolio Management

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Activate Investment Funding for projects and demands

Activate the Investment Funding (com.snc.investment_funding) plugin if you have the admin role. This plugin includes demo data and activates related plugins if they are not already active.

Before you begin

Ensure that the PPM Standard (com.snc.financial_planning_pmo) plugin is installed.

Role required: admin

About this task

The Investment Funding (com.snc.investment_funding) plugin enables you to request or allocate funds for your projects and demands.

The plugin activates the related plugins if they are not already active. It also adds the sn_invst_pln_investment_user role to the following roles:

- project_manager
- demand_manager
- portfolio_manager
- program_manager

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

   Note:
   When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Related topics

Install Investment Funding

List of plugins (Xanadu)

Currencies and budget reference rates

The support for use of multiple currencies provides conversions for budget items in different currencies.

Currency support

The application can use a base currency, also called the reporting currency that you specify with system properties. You can also specify other currencies for budgets and budget items.

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Currency usage

Item	Currency used
Budget plan	A currency that you specify on the Budget Plan form. When the plan is converted to a forecast, the application converts the currency to the reporting currency.
Budget plan items	A currency that you specify on the Budget Item form. If the budget plan item has currency different from the budget plan currency, the budget plan item amount is converted to the budget plan currency.
Budget forecast	The reporting currency.

Budget reference rates

Budget reference rates are exchange rates between currencies. Each reference rate is valid for a specified time period. The application uses budget reference rates when budget items are in a different currency from the budget plan and forecast. The application automatically converts budget item currency values to a global system currency value when it calculates the Budget Amount on a Budget Plan, and when it shows values on budget forecasts.

Note:
Currency support is for budgets only. You cannot create allocations in multiple currencies.

Test Management 2.0 integration with Project Portfolio Management

Test Management 2.0 integration with Project Portfolio Management enables you to carry out testing activities on projects.

After activating both the Test Management 2.0 and Project Portfolio Management applications, you can:

- Add a test phase to a project.
- Assign a test execution suite to the test phase.
- View the tests associated with the test execution suite.
- Assign tests to testers.
- Perform tests and record results.
- Track the progress using the **Percentage complete** field in the timeline.

As testers perform tests and record results, the information is updated to the test, test phase, and then to the project.

Note:
If you're an existing user, the integration between Project Portfolio Management and Test Management 1.0 continues to work the same. You can still create test phases, associate test phases to a test plan, and perform testing activities.

Agile Development 2.0 integration with Project Portfolio Management

Project Portfolio Management leverages the Agile Development 2.0 application to combine the Scrum methodology with project-based IT development.

IT organizations typically work on multiple projects with shorter time schedules. The project planning and tracking is done using waterfall, but the group prefers scrum methodologies to

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carry out their work. It then becomes a challenge to track project status when there is an agile development phase. This integration between Agile Development 2.0 with Project Portfolio Management facilitates a combination of waterfall and agile methods for project management and development.

The flow described below is applicable when Agile Development 2.0 is activated along with Project Portfolio Management.

- Create a group to represent a Scrum team.
- Add members to the group.
- Create sprints.
- Assign groups to projects from the Project Workbench.
- Maintain group and project backlogs. Multiple projects can be under development and groups can be assigned to multiple projects. Each project and each group has its own backlog. The project backlog includes all stories related to a project. The group backlog includes stories from multiple projects that have been assigned to the group.
- Perform group sprint planning. The group refines the combined backlog, ranks the stories and assigns points, and adds stories to sprints based on priority.
- Create stories, including one-off stories that are not related to projects.
- Track progress in stories, phases, and projects.

Create and manage agile projects

An overview of the tasks involved in creating an agile project.

The following tables, arranged by task group, list the tasks involved in creating an agile project.

Set up a development group

Task	How do I do this?
Define an Agile group	Navigate to **Agile Development** > **Create Agile Group** and click **New**.
Add group members	Navigate to the **Group members** related list on the Group form and click **Edit**.
Decide the capacity of a group	Navigate to **Agile Development** > **Groups**, select the desired group, and enter a number in the **Group capacity (points)** field.

Create sprints

Task	How do I do this?
Create a sprint	Use the **Create Sprints** related link on the Group form to create multiple sprints or use the **Sprints** related list to create individual sprints.
View the created sprints	Use the **Sprints** related list on the Group form.

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Create a new project

Task	How do I do this?
Create a project	• Navigate to **Project** > **Projects** > **Create New**. • Navigate to **Project** > **Projects** > **Project Workspace** and click **New Project**.

Open an existing project

Task	How do I do this?
Open an existing project	• Click the **Project Workspace** related link on the Project form. • Navigate to **Project** > **Projects** > **Project Workspace** and select the project from the **Select Projects** choice list in the workspace header.

Add phases to a project from the project workbench

Task	How do I do this?
Create an agile phase for a project	Click the Add phase icon (+) and select **Agile** from the Phase Type choice list. **Note:** This option appears only when both the Project Portfolio Management and Agile Development 2.0 applications are installed.
Create a test phase for a project	Click the Add phase icon (+) and select **Test** from the Phase Type choice list. **Note:** This option appears only when both the Project Portfolio Management and Test Management 2.0 applications are installed.

Add details to a project phase from the project workbench

Task	How do I do this?
View phase details in list view or VTB	Click the **List** or **VTB** button in the project workbench header.
Assign a group to an agile phase	Edit the Agile phase and select a group in the **Group** field.
Select sprints for an agile phase	Edit the Agile phase, ensure that a group has been assigned, and select a **Start Sprint** and **End Sprint**.

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Add details to a project phase from the project workbench (continued)

Task	How do I do this?
Create stories for an agile phase	Click the Agile phase in the project workbench and click **New** in the detail view header.
Refine stories for one project	Click the **Manage Stories** button to open the Manage Stories dialog box. **Note:** You can also use the **Agile Planning & Tracking** related link on the Project form to view your backlog, assign stories to the projects, or create new stories for the project.
Refine stories across multiple projects	Click the **Manage Stories** related link on Group form.
Assign a group to an agile phase	Click the Agile phase edit icon and select the group from the **Group** choice list.

Add milestones to a project from the project workbench

Task	How do I do this?
Add milestones to a project	Click the Add phase icon (+) and then click **Milestone** at the top of the Add Phase pop-up window.

Plan sprints

Task	How do I do this?
Start sprint planning	Navigate to **Agile Development** > **Groups**, open the desired group, and click the **Sprint Planning** related link.
Add stories to the sprint	Navigate to **Agile Development** > **Groups**, open the desired group, click the **Sprint Planning** related link, and click **Create story**.

Testing process (Only when Test Management 1.0 is activated)

Task	How do I do this?
Create a test plan	Navigate to **Test Management** > **Test Execution** > **Test Plans** > **New**.
Add test cases to a test plan	Click the **Add Test Cases from Test Suite** related link on the Test Plan form.
Assign test cases to testers	Select a user in the **Assigned to** field on the Test Case form.
Notify testers to start testing	Click the **Notify testers** to start testing related link on the Test Plan form.
Tester performs tests and submits results	Navigate to **Self-Service** > **My Tests** or **Self-Service** > **My Assessments**.

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Testing process (Only when Test Management 1.0 is activated) (continued)

Task	How do I do this?
Monitor the testing progress	The Test Plans list, Test Plan form, and Test Case form all display results for test cases and individual tests.
Testing sign-off	Click the **Sign-off Test Plan** related link on Test Plan form.

Testing process (Only when Test Management 2.0 is activated)

Task	How do I do this?
Create a test execution suite	Navigate to **Test Management 2.0** > **Test Execution Suites**, and click **New**.
Add tests to a test execution suite	Open a test execution suite, and click **Add tests**. From the **Tests** list, select the required tests and click **Add to Execution Suite**.
Assign tests to testers	Open a test execution suite. In the **Test execution assignments** related list, assign tests to testers. **Note:** Only the tests in the Ready state can be assigned.
Tester performs tests and submits results	Navigate to **Test Management 2.0** > **Tests Assigned to me**. Select the required tests and click **Run**.

Define an Agile group

Create an agile assignment group to later assign the work of an agile project.

Before you begin

Role required: admin

About this task

Assignment groups in Agile Development 2.0

Procedure

1. Navigate to **All** > **Agile Development** > **Groups**.
2. Click **New**.
3. On the form, fill in the fields:

Group form

Field	Description
Name	Enter the name of the group.
Manager	Select the manager of the group.
Group capacity (points)	Enter the projected capacity of the group in story points for each sprint.
Group email	Email address of the group.
Description	A brief description of the group.

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Related links of the Group form

Field	Description
Create Sprints	Access the **Create Sprints for Team** dialog box. Fill in the fields and then click **OK** to create multiple sprints for the current group. The new sprints are added to the **Sprints** related list.
Sprint Planning	Access the **Sprint Planning** tab on the Agile Board.
Group Velocity	Access a chart which shows how the story points in a project are allotted across sprints.

4. Click **Submit**.

Add group members

Add members to the group who are later assigned tasks of an agile project.

Before you begin

Role required: none

Procedure

1. Navigate to **All** > **Agile Development** > **Groups**.
2. Open the desired group.
3. Click **New** in the **Group Members** related list.
4. Add the name of the group member in the **Name** field.
5. Select a **Scrum Role** for the group member.
6. Click **Submit**.

Decide the capacity of a group

Decide the capacity of a group based on the historical velocity of the group for each sprint.

Before you begin

Role required: scrum_master

Procedure

1. Navigate to **All** > **Agile Development** > **Groups**.
2. Open the desired group.
3. Decide the group capacity in points and enter the number in the **Group capacity (points)** field.
4. Click **Update**.

Convert a release team to an agile group

Convert a release team to an agile group to later assign the work of an agile project.

Before you begin

Role required: project_manager

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About this task
This section is applicable only if you have upgraded from Agile Development 1.0 to Agile Development 2.0.

Procedure
1. Navigate to **All** > **Agile Development** > **Groups**.
2. Click the **Convert Release Teams to Groups** related link.
3. Select the team that you want to convert to an agile group.
4. Click **Convert to Group**.

Create a sprint

Create a sprint to plan the work for an agile phase of a project.

Before you begin
Role required: none.

Procedure
1. Navigate to **All** > **Agile Development** > **Groups**.
2. Open the desired group.
3. Click **New** in the Sprints related list.
4. Fill in the following fields on the Sprint form:
   - **Short description**: Name or a brief description of the sprint
   - **Planned start date**: Start date for this sprint
   - **Planned end date**: End date for this sprint
   - **Group capacity (points)**: Projected capacity of the group in story points
5. Click **Submit**.

Create multiple sprints

Create multiple sprints to plan the work for an assignment group.

Before you begin
Role required: none.

Procedure
1. Navigate to **All** > **Agile Development** > **Groups**.
2. Open the desired team.
3. Click the **Create Sprints** related link to open the Create Sprints for Team dialog box.
4. In the Sprint form, fill in the fields:
   - **Name**: the name of the sprint.
   - **Starting Number**: the number of the first sprint to be created.
   - **Start date**: the start date for the first sprint to be created.
   - **Duration**: the number of days in a sprint.
   - **Number of sprints**: the number of sprints to be created.

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5. Click **OK**.
   The new sprints are added to the **Sprints** related list on the Team form.

Assign a group to a project

Assign a group to a project so that the group later works on the tasks of the assigned project.

Before you begin
Role required: it_project_manager

Procedure

1. NavNavigate to **All** > **Project** > **Projects** > **All**.
2. Select your project to open its form.
3. From the **Assignment group** field, select a group to assign this project.
   If you don't see the group that you need, work with your admin to create it. See Define an Agile group.
4. Save the project form.

Add stories to a project

Create stories and associate them to a project or add existing stories to your project.

Before you begin
Role required: it_project_manager

About this task

- The stories list displays current active stories. You can create a story from this list or view the story form for a current story. You can also add scrum tasks from the story form and view the story and task progress boards.
- Stories can be associated to projects, but is not mandatory. While creating a story, if a project has only one phase then the story automatically gets tagged to the only phase.
- One-off stories can be created without a link to a product or a project. One-off stories are created with only a short description, and can be assigned to a group.S
- Stories can be added to only those projects that have the **Execution type** field set to **Hybrid** or **Agile**.

Procedure

1. Navigate to **All** > **Projects**.
2. Open a project that you want to add stories.
3. From the Stories related list, select one of the following:
   - **Add Existing** to add existing stories to this project.
   - **New** to create a story and add it to this project.

     For information on the form fields, see the descriptions in Story form.
4. Save the project form.

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What to do next

- Create scrum tasks for this story. See Create a scrum task for Agile Development 2.0 stories.
- Use the related links and lists of the story for more actions that you can perform. See Related links and lists for a Story in Agile Development 2.0.
- Add dependencies for Agile Development 2.0 stories
- You can create a story with the same details as this story by using the **Insert** or **Insert and Stay** options from the story additional actions (☰).

  When you use **Insert and Stay**, the form of the newly created story stays open. You can modify the details of the story or create more stories with these details. On the Agile board, the new story is positioned right below the original story. The global rank of the new story is set accordingly.

  Note:
  Set the *glide.ui.task.insert* and *glide.ui.advance* properties to **true** to access these actions. These actions are not allowed on stories added from the triage board.

Plan sprints

Streamline your sprint planning and completion activities using the **Sprint Planning** tab.

Before you begin

Role required: scrum_admin, scrum_master, or scrum_sprint_planner

Procedure

1. Navigate to **All** > **Agile Development** > **Groups**.
2. Open the desired group.
3. Click the **Plan Sprints** related link.
   The Agile Board, **Sprint Planning** tab appears.
4. Use either of options to view all the active stories assigned to the team, but not assigned to any sprint in the Backlog section.

   Note:

   - If the backlog contains more than 50 stories, then pagination control appears at the bottom of the list enabling you to navigate to the previous, next, first, or last pages in the list.
   - Rearranging stories in the backlog changes the ranking of stories. Ranks are stored in the global_rank column in the Story [rm_story] table. When you move a story within a backlog, its rank changes relative to the stories within the same backlog. Thus, if the story exists in some other backlog, its ranking might change but position in the backlog would remain the same.

5. To start a sprint, click **Start** that appears at right-corner of the first or top sprint.
   The**Sprint Tracking** tab appears.
6. To complete a sprint, click **Complete Sprint** that appears at right-corner of the first or top sprint.

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a. Move incomplete stories, if any, to the backlog or a future sprint.

b. Click **Complete**.
The sprint disappears from the **Sprint Planning** tab and appears in the Sprint list as complete.

Track progress

Track the progress of an agile phase from the Project Workbench timeline.

Before you begin
Role required: none

About this task
Stories are assigned to a project and are tied to an agile development phase in the Project Workbench. As stories are completed, the story points and the story status get rolled up to the sprint and project phase. In turn, the phase gets rolled up to the project.

Procedure

1. Navigate to the Project Workbench timeline.
2. The color in the phase bar increases to show progress and the **Percentage complete** field is updated.

Activate PPM Standard (Project Portfolio Management)

Activate the PPM Standard plugin (com.snc.financial_planning_pmo) if you have the admin role. This plugin installs the Project Portfolio Management applications.

Before you begin
Role required: admin

About this task
The PPM Standard is the basic plugin for the PPM (Project Portfolio Management) applications.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note:
   When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

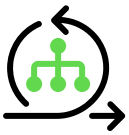
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Result
All PPM applications are installed in your ServiceNow instance, along with their user roles and tables. For more information, see Components installed with Project Portfolio Management (PPM) Standard.

Innovation Management

The Innovation Management enables you to gather and evaluate ideas efficiently, and to quickly identify and process the ideas with the greatest potential for implementation.

Get started

Explore 	Configure 	Use 
Integrate 	Reference 	

The Idea Portal accelerates and organizes idea gathering, evaluation, selection, and execution. The idea manager or demand manager evaluates submitted ideas and promotes accepted ideas to demands, epics, features, or stories.

Exploring Innovation Management

The Innovation Management application is a central repository to gather and evaluate ideas to determine which ideas are most likely to be implemented.

Innovation Management overview

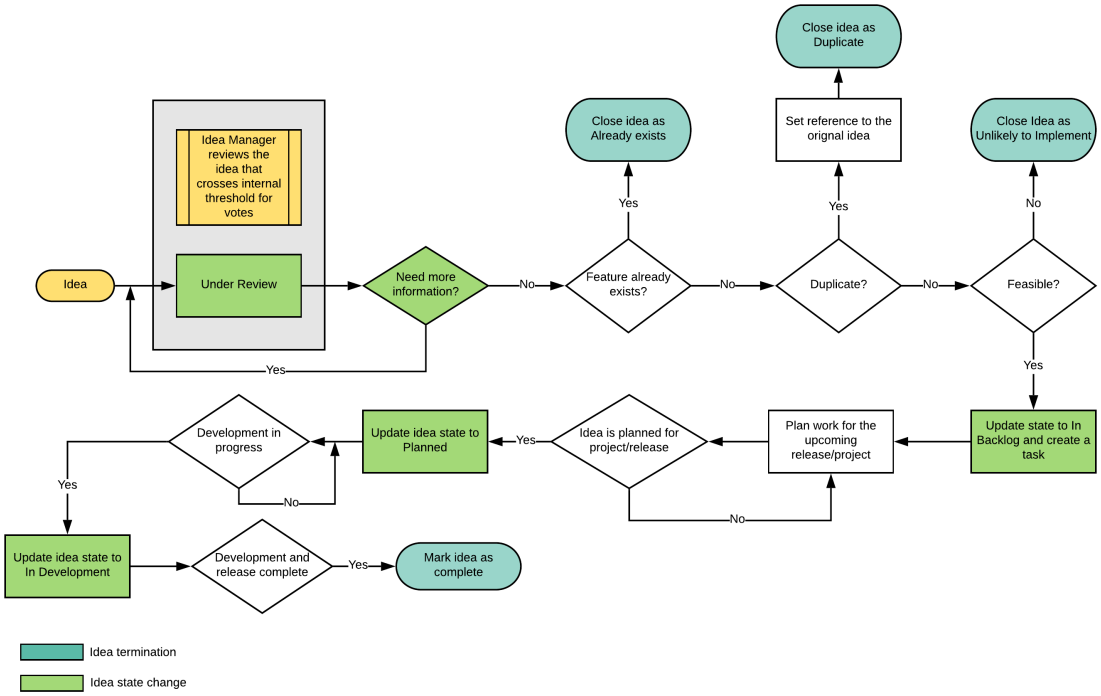
The process of innovation management includes managing an organization's innovation from the initial ideation phase to the final implementation. It includes the decisions, activities, and practices involved in devising and implementing an innovation strategy. The Innovation Management application enables you to submit, track, view, discuss, filter, and vote on ideas.

Innovation Management workflow

The image explains the idea workflow from submitting the idea to completing it.

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Idea workflow



Innovation Management benefits

Innovation Management benefits

Benefit	Feature	Users
Collect new ideas for a product, feature in Idea Portal to vote on.	Submit an idea	Users with access to the application.
View, filter, and organize ideas to work upon.	View, filter, and sort ideas	Users with access to the application.
Collaborate through interactive comment boards to exchange information about ideas in a central location.	Collaborate on ideas	idea_manager
Create a task to plan and develop an accepted idea.	Create a task for an idea	idea_manager or idea_manager_professional
Create an Idea module to store and group ideas.	Create an Idea module	idea_admin
Create new idea categories to associate with a submitted idea.	Define new idea categories	idea_admin
Use the Idea Dashboard manager to analyze and review your ideas.	Analyzing idea metrics using Idea Manager dashboard	idea_manager or idea_manager_professional
Create an idea from a universal request and manage your ideas.	Create an Idea from Universal Request	idea_admin
Transfer an idea to another department if the idea is rejected or can't be implemented.	Transfer an Idea to another department	Agent to whom the idea is assigned or is

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Innovation Management benefits (continued)

Benefit	Feature	Users
		a part of the assigned work group.

What to explore next

To learn more about configuring and using Innovation Management, see:

- Configuring Innovation Management
- Managing ideas using Innovation Management
- Managing Idea Portal
- Analyzing idea metrics using Idea Manager dashboard
- Integrating Innovation Management with Universal Request
- Innovation Management reference

Predictive Intelligence for Innovation Management

The Predictive Intelligence for Innovation Management capability uses machine-learning algorithms to search and display similar ideas while submitting a new idea.

The PPM Predictive Intelligence Workbench includes a prebuilt use case template that systematically guides you through the process of creating and training new predictive models, evaluating and testing them, and finally adding them to your business process to add value to your Idea, Demand, and Project Management.

Once you train your custom use cases, they are usable immediately. No prior knowledge or experience with artificial intelligence or machine learning is required when you use the PPM Predictive Intelligence Workbench.

The application includes templates with prebuilt guidance to assist you in creating, training, evaluating, testing, and producing your unique predictive models.

Predictive Intelligence for Innovation Management has the following benefits:

- Improves the quality of your idea database by avoiding duplicate ideas.
- Suggests related ideas to help you identify similar ideas and merge duplicate ideas.

Activation information

Activate the following plugins before using the Predictive Intelligence Workbench:

- Predictive Intelligence for PPM (com.snc.ppm_ml) plugin
- Predictive Intelligence for Ideation (com.snc.innovation_management_ml) plugin

Solution definitions for Predictive Intelligence for Innovation Management

The solution definitions for Predictive Intelligence for Innovation Management capability are available in the Predictive Intelligence for Ideation plugin (com.snc.innovation_management_ml). For more information about Predictive Intelligence, see Predictive Intelligence.

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Solution Definition for Innovation Management

Solution Definition	Solution Type	Description
Similar Ideas **Note:** This solution definition is available as a template on instances where the following plugins are active: • Predictive Intelligence • PPM Standard (com.snc.financial_planning_pmo) • Predictive Intelligence for Ideation (com.snc.innovation_management_ml)	Similarity	Suggests related ideas based on the **Title** and **Description** fields. You can see the results in the following places: • The Related Ideas section on the Create an Idea form when creating an idea in the Idea Portal. • The Related Ideas section on the Ideas page in the Idea Portal.

Related topics

Predictive Intelligence

Train the similarity solution for Innovation Management to find similar ideas

Submit an idea using the supplier catalog

PPM PIWB template - Find similar ideas

Configuring Innovation Management

Configure Innovation Management application to analyze, track, and promote ideas to a task, demand, or project. This application is available with Strategic Portfolio Management.

Install Idea Manager dashboard

You can install the Idea Manager dashboard application from ServiceNow Store if you have the admin role. This application includes demo data and installs the related plugins if they are not already installed.

Before you begin

Note:
Starting with version 2.0.0, the Idea Manager dashboard is available in the Next experience UI Framework which can be accessed from Analytics Idea Manager.

- Ensure that the application and all of its associated store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- If the application requires plugins or other store applications, install them first if they are not already installed. For the Idea Manager dashboard application, the following plugins are required:
  - PPM Standard plugin (com.snc.financial_planning_pmo)

    For information on activation steps, see Activate PPM Standard (Project Portfolio Management).

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Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the application using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find an application, you may have to request it from the ServiceNow Store.

   Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Result

You can access the Idea Manager dashboard by navigating to **Ideas** > **Idea Manager Dashboard**.

What to do next

Run the following Performance Analytics data collector jobs before using the Idea Manager dashboard.

- *[PA PPM IMD] Historic Data Collection*: Collects historical data related to ideas and runs on demand to update data for dashboard.
- *[PA PPM IMD] Daily Data Collection*: Collects data for daily indicators and runs daily to update data for dashboard.

Related topics

List of plugins (Xanadu)

Configure idea categories

Map an idea category table with an Idea module to specify the category options listed on the Idea Portal and the create an idea form.

Before you begin

- Role required: idea_admin
- Identify the Idea module and idea category table that you want to use.

About this task

Configuring idea category with the Idea module is required to fetch the list of categories in the Idea Portal. If you have created static categories, use the Idea Category [im_category] table to configure the mapping between the idea module and idea category table.

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Use your existing product or department table to define dynamic idea categories. The dynamic categories are derived from specific columns and fields of the parent table.

Note:
You can map only one category table with an Idea module.

Procedure

1. Navigate to **All** > **Ideas** > **Idea Category Config** > **New**.
2. On the form, fill in the fields.
   For more information, see Idea Category Configuration form.
3. **Optional:** Create filter conditions to determine the idea categories to be listed on the Idea Portal.
4. Select **Submit**.

Configure idea categories for transferring a request as an Idea

Configure idea states to use when directly transferring an HR case, incident, or a custom task from your department as an idea.

Before you begin
Role required: admin

About this task
When an idea is created in the Idea Portal, it must be associated with at least one or multiple categories. Create mapping between your department-specific primary ticket and idea category to be used when a service ticket is transferred as an idea to another department.

Procedure

1. Navigate to **All** > **Universal Request** > **Administration** > **Direct Transfer Configuration**.
2. Follow the steps as described in Direct transfer mapping.
3. Select **Submit**.

Migrating from the legacy Ideas application to Idea Portal

If you are upgrading to the Xanadu release, complete the migration tasks after the upgrade to start using the new Idea Portal.

Review the following information and make any necessary changes to your configuration:

Idea States

The new Idea Portal provides new idea states such as Completed, Under Review, and In Backlog, which are mapped with your existing idea states. The following tables provide a comparison to the existing idea states and the equivalent new states with their values.

Legacy Ideas application

Idea State	Value
Draft	-5
Submitted	1
NA	NA

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Legacy Ideas application (continued)

Idea State	Value
NA	NA
Accepted	2
NA	NA
NA	NA
Closed complete	3
Closed skipped	7
NA	NA
NA	NA

Idea Portal

Idea State	Value
Draft	-5
Submitted	1
Under Review	-1
Need more information	-2
In Backlog	2
Planned	4
In Development	5
Completed	3
Unlikely to Implement	7
Duplicate	8
Already Exists	9

Starting with the Xanadu release, idea states are stored in and retrieved from the Idea [im_idea_core] table. You can continue to use your existing idea states along with the new idea states. However, if you want to use only these new states for managing your ideas, navigate to the Choice [sys_choice] table and delete the old idea states.

Idea categories

Organize your ideas using categories, for example, to group ideas that are relevant to a particular product, department, or business unit. If your existing ideas are not associated with any category, create new categories or select an existing table to define categories to which you can map your ideas. The Ideas application also installs a set of default new categories to which you can associate your existing ideas.

If your ideas are already associated with categories and you want to use the new categories, you can map your existing idea categories to the default new categories. You then write and use a script to create m2m mapping between existing ideas and categories.

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Note:
You must map an existing idea with appropriate categories for your ideas to appear in the Idea Portal.

Converting ideas to demands or project, stories, initiatives, and epics

You can convert an idea into work entities other than demands. The **Create Task** button enables you to convert an idea into a project, epic, or story as well as a demand becomes available in the Idea form.

You must have the required Agile plugins Agile Development 2.0 and Scaled Agile Framework (SAFe) and Continual Improvement Management installed to view these options.

If you want to allow conversion of ideas only to a demand, disable the **Create Task** button and continue using the **Accept** button or disable the **Accept** and **Defer** buttons to use other options. For more information see, Using the form designer.

Business rules

Review the existing business rules in the idea table. Set the business rules that you don't want to apply as False.

Navigation for legacy Idea application

To encourage your users to submit ideas through the new Idea Portal, remove navigation for old Idea application from the application menu and deactivate the Submit an Idea option from the Service Catalog. For more information see, Enable or disable an application menu or module.

Managing ideas using Innovation Management

Use the features and capabilities of Innovation Management to capture, analyze, and manage your ideas. As an idea manager, manage submitted ideas by reviewing them, making modifications, or deleting outdated ones, identifying duplicates, and updating and tracking their state.

Related topics

Innovation Management reference

Submit an idea

Submit an idea for a product, feature, enhancement, or change in the Idea Portal for others to vote on. Select categories relevant to the idea and, if useful, attach files to add details.

Before you begin
Role required: None

About this task
The Idea Portal is where you share your product, feature, change, or enhancement ideas. Submit your ideas, view, and subscribe to the ideas of other users, and track the progress of a subscribed idea. For more information, see View, filter, and sort ideas and Collaborate on ideas. New ideas are created in the **Submitted** state. You can edit your submitted idea in the Idea Portal after it has been submitted until the state is changed to **Completed**.

Procedure

1. Navigate to **All** > **Ideas** > **Idea Portal** > **Create an Idea**.
2. On the form, fill in the fields.
   For more information on fields and description, see Create an Idea form.

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3. **Optional:** If you have attachments related to the idea, select **Add attachments** and attach them.
4. Select **Create**.

What to do next

- View, filter, and sort ideas
- Collaborate on ideas
- Manage ideas
- Evaluate an idea
- Create a task for an idea

View, filter, and sort ideas

View ideas submitted by you or all submitted ideas. Filter and sort the ideas based on idea state, category, or date.

Before you begin

Role required: None

About this task

You can view the following information for an idea:

- Title
- Number of votes
- Name of the submitter
- Age
- Current state
- Category to which the idea belongs.

Procedure

1. Navigate to **All** > **Ideas** > **Idea Portal**.
2. Perform the following tasks on My Ideas and All Ideas tab.

My Ideas and All Ideas tab

Task	Steps
View your own submitted ideas.	Navigate to **Idea Portal** > **My Ideas**.
View all submitted ideas.	Navigate to **Idea Portal** > **All Ideas**.
View details of an idea.	Select the title of the idea.
Filter the ideas based on the idea state.	Select a state from the State list.
Filter the ideas based on idea categories.	Select a category from the Category list.
Sort the ideas based on the most recent ideas, the number of votes, or the date of creation.	Select an option from the Sort by list.

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Collaborate on ideas

Use the comment option to discuss ideas and exchange information about ideas. Up-vote or down-vote an idea to register your level of interest and support for an idea. Subscribe to an idea to track its progress.

Before you begin
Role required: None

About this task
You cannot comment and vote for ideas that are in the **Completed**, **Unlikely to implement**, **Duplicate**, or **Already exists** state. The Open (Open) or Closed (Closed) icon indicates whether the idea is open or closed for comments and votes.

Procedure

1. Navigate to **All** > **Ideas** > **Idea Portal**.
2. Select the title of an idea to view its details.
3. Review the idea details and then choose which action to perform on the idea.
   For more information on actions and steps, see Collaborate on idea.

Manage ideas

As an idea manager, manage submitted ideas by reviewing them, making modifications, or deleting outdated ones, identifying duplicates, and updating and tracking their state.

Before you begin
Role required: idea_manager

About this task
The idea manager reviews submitted ideas and, if necessary, requests more information, and then chooses to accept or reject the idea. The number of votes on an idea helps in assessing the popularity and demand for the idea. Change the state of the idea to reflect its status. Changing the state helps in notifying the idea submitter and subscribers about the progress of the idea.

Note:
The idea submitter and all the subscribers receive a notification email whenever there is a change in the state of an idea. A notification email is also sent whenever a user comments on an idea or replies to a comment.

Procedure

1. Navigate to **All** > **Ideas** > **Idea Portal**.
2. Select the title of an idea to view its details.
3. Select the more options icon (•••), and then select the **Open in platform** option to open the idea in the form view.
4. Review the idea details and then choose which action to perform on the idea.
   For more information on actions and steps, see Manage ideas.
5. Select **Update**.

What to do next
Convert selected ideas into tasks such as demand, project, stories, and epics.

Evaluate an idea

Review submitted ideas and then accept or reject them.

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Before you begin
Role required: idea_manager

About this task
As an idea manager, evaluate an idea and then decide whether to accept or reject an idea. If an idea cannot be implemented right away, move the idea to the backlog and pick it up later. Accept the ideas that are feasible for implementation and create a task such as a demand, project, or story from it. Plan and work on these tasks to develop an idea into a new feature, product, or enhancement.

Procedure
1. Navigate to **All** > **Ideas** > **Idea Portal**.
2. Select the title of an idea to view its details.
3. Open the idea in form view by selecting the more options (•••) icon, and selecting the **Open in platform** option.
4. Review the idea details and then choose which action to perform on the idea.
   For more information, see Evaluate ideas.
5. Select **Update**.
   Convert the accepted ideas to a demand, epic, story, or feature based on how you would like to execute your idea. Use relevant options such as Epic, SAFe epic, or Improvement initiative based on the plugins installed such as PPM Standard, Agile Development 2.0 and Scaled Agile Framework (SAFe). After creating a demand or a project, change the state of the idea to track its status during different stages of development.

Create a task for an idea

Create a task for planning and developing an accepted idea.

Before you begin
Role required: idea_manager or idea_manager_professional

About this task
Create a task such as a demand, project, story, SAFe epic, SAFe feature, or SAFe story for an accepted idea. Plan and work on these tasks to develop an idea into a new feature, product, or enhancement.

Procedure
1. Navigate to **All** > **Ideas** > **Idea Portal**.
2. Select the title of an idea that you want to create a task for.
3. Open the idea in form view by clicking the more options (•••) icon, and selecting the **Open in platform** option.
4. Select an appropriate state for the idea from the State list based on the priority of the idea.
   For more information about different idea states, see Manage ideas.
5. Select **Create Task**.
6. In the **Convert Idea to task** dialog box, select a task type from the Select task type list.
   The available task types are:
   - Demand
   - Project
   - Epic
   - Story

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- SAFe epic
- SAFe feature
- SAFe story

These task options are based on the installed plugins such as PPM Standard, Agile Development 2.0, and Scaled Agile Framework (SAFe).

Note:
You must also have the appropriate role based on the plugins to create these task types.

Train the similarity solution for Innovation Management to find similar ideas

Train the Similar Ideas solution definition included within the Predictive Intelligence for Ideation capability to find related ideas when submitting an idea or viewing ideas in the Idea Portal.

Before you begin

Ensure that the Predictive Intelligence plugin (com.glide.platform_ml), PPM Standard plugin (com.snc.financial_planning_pmo), and Predictive Intelligence for Ideation plugin (com.snc.innovation_management_ml) are activated. For more information about Predictive Intelligence, see Predictive Intelligence.

Role required: admin

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Similarity** > **Solution Definitions**.
2. In the Similarity Definitions list, search for and select the Similar Ideas solution definition (ml_sn_global_similar_ideas).
3. On the Similarity Definition form, verify the default field values for ideas.
   For more information about the Similarity Definition form fields, see Create and train a similarity solution.
4. Click **Update & Retrain**.
5. Open the Similarity Definition form for the Similar Ideas solution definition (ml_sn_global_similar_ideas).
6. In the ML Solutions related list, view the training solution progress in the **Progress** column.

Note:
Alternatively, you can click the link for the solution in the **Active** column. On the ML Solution form, click the **Show training progress** related link to check the training solution progress.

Result

When the solution is complete, the similar ideas appear in the Related Ideas section on the Create an Idea form and Related Ideas section on the Ideas page in the Idea Portal.

What to do next

- Review similarity examples: On the Similarity Definition form, in the ML Solutions related list, when **Progress** is 100%, in the **Active** column, click the link for the solution. On the ML Solution form, click the **Similarity Examples** related link to view the Similarity Examples list.
- Update the similarity score threshold: On the ML Solution form, on the **Solution Statistics** tab, enter the required value in the **Similarity Score Threshold** field. Right-click the ML Solution form and click **Save**.

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- Test the prediction output for the records: On the ML Solution form, on the **Test solution** tab, enter your text in the **Short description** field and the maximum number of expected results in the **Top N** field, and then click **Run test**. The results above the similarity score threshold value are displayed.

Related topics

Predictive Intelligence

Predictive Intelligence for Innovation Management

Submit an idea

PPM PIWB template - Find similar ideas

Use a guided template that walks you through training the Similar Ideas solution definition for finding similar ideas.

Before you begin

Activate the following plugins before using the Predictive Intelligence Workbench:

- Predictive Intelligence for PPM (com.snc.ppm_ml) plugin
- Predictive Intelligence for Ideation (com.snc.innovation_management_ml) plugin

Role required: piwb_manager

Procedure

1. Navigate to **All** > **Predictive Intelligence Workbench** > **Use Cases** > **Create New from Template**.
2. Select the **Similar Ideas** template.
3. Click **Start**.
   The use case set up window opens displaying the name and description of the use case.
4. Click **Take me there**.
   The **ServiceNow Machine Learning Solutions** page opens and displays all the available solutions.
5. Expand the **Similarity** solution to see the available solution definitions.
   Configure or train the **Similarity** solution for finding similar ideas.
   - To configure the Similar Ideas solution definition (ml_sn_global_global_similar_ideas), click **Configure**. For more information, see Train the similarity solution for Innovation Management to find similar ideas.
   - To train the Similar Ideas solution definition (ml_sn_global_global_similar_ideas), click **Train**.

Managing Idea Portal

The Idea Portal is your central location to collect, curate, and promote ideas into demand, project, epic, or story. It enables integration of key feedback and requests into your product planning and development process.

The Idea Portal enables you to do the following:

- View, submit, vote, and subscribe to ideas.
- Collaborate using comments to discuss and exchange information on ideas.

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- Users who submit, comment, or subscribe to an idea receive a notification for any state change, comment, or reply to that idea keeping them informed about its status and progress.
- View the details of an idea and ask or answer questions and exchange information about an idea using comments. Comments maintain a trail of discussion and help to identify key contributors for an idea or reasons for its success and failure.

Idea and demand managers use the Idea Portal to do the following:

- Manage submitted ideas.
- Review and evaluate the submitted ideas and select the ideas that meet their requirements.
- Assess the popularity and demand of an idea from the number of votes.

The selected ideas are converted into tasks for planning and then developed into a new product, feature, or enhancement.

Maintain separate data storage and control access

You can use the Idea module to do the following:

- Store ideas and categories belonging to different departments, products, or business units separately.
- Store and organize ideas, enable voting, and, if your organization is large, you can configure different portal pages with unique sets of categories, for example, for HR, IT, and Support.
- Control access, allowing only the users of a specific business unit or department to submit and view ideas belonging to a specific category through the Idea Portal by creating access-control lists in the table that you want to use for categories. For example, if you do not want users outside the Payroll department to view the ideas associated with the category Salary, create ACLs with read access, at least, to the employees of Payroll department in the parent table that is used to derive the category Salary. The ACLs restrict the employees outside the Payroll department from viewing the ideas associated with the category Salary. For more information, see Create an Idea module.

Note:
Innovation Management supports basic level of domain separation. For more information about domain separation, see Application support for domain separation and Domain separation and Project Portfolio Management.

Idea Portal administration

Idea Portal enables end users to view, submit, filter, sort, comment, and vote on ideas. Idea managers use the Idea Portal to review, evaluate, collaborate on, and manage ideas. An idea admin configures an Idea module, maps idea categories to the Idea module, and adds navigation for the Idea Portal page.

The Managing Idea Portal retrieves data from the Idea module, therefore, you must configure an Idea module first. Consider configuring separate Idea modules for your product, department, or business unit. Review, plan, and identify the following items before configuring an Idea Portal:

- Idea table
- Idea module
- Idea categories
- Navigation to the Idea Portal page

Complete the following tasks to set up and configure an Idea Portal for your product, department, or business unit:

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Idea Portal navigation

Configure the Idea Portal URL to enable access to the Idea Portal from the application navigator.

Before you begin
Role required: idea_admin

About this task
Enable access to the Idea Portal module using the Application Menus module.

Procedure

1. Open the **Ideas** application menu record and add the Idea Portal to the navigation menu.
   For information about how to add Idea Portal to the navigation menu, see Create a module.
2. In the Module form, set the value of the **Link type** field as **URL (from arguments)**.

   Use the Module Id as a parameter in the URL to specify the Idea module that you want to associate with the Idea Portal.

   For example, if you created an Idea module for your HR department and used **hr** as the **Module Id**, the URL to access the Idea Portal would be as follows: `/idea/?id=ideas_list&sysparm_module_id=hr`.

Create an Idea module

An Idea module defines the ideas and categories that are displayed in the Idea Portal. Create an Idea module to store and group ideas, and define categories based on product, department, or business unit.

Before you begin

- Identify an idea table to store your ideas. Use an existing table or create a new table to extend the Idea [im_idea_core] table.

  Use a different idea table for each Idea module. Separate idea tables ensure that ideas for different modules are stored separately.

- Role required: idea_admin

Procedure

1. Navigate to **All** > **Ideas** > **Settings** > **Idea Module** > **New**.
2. On the form, fill in the fields.
   For more information on fields and description, see Idea module form.
3. Select **Submit**.

What to do next
Define new idea categories or use an existing table to derive the categories from specified columns and map it with your idea module. For more information, see Configure idea categories.

Define new idea categories

Create new idea categories that a user can select to associate with a submitted idea. You can also add custom idea categories.

Before you begin
Role required: idea_admin

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About this task

The default Idea Category [im_category] table stores the user-defined idea categories. Define new idea categories if you do not want to use an existing table or if you want to use custom idea categories. Create nested idea categories for defining a hierarchy of the idea categories.

You can use multiple idea categories with an Idea module, however, you can map only one category table with an Idea module.

Procedure

1. Navigate to **All** > **Ideas** > **Idea Category** > **New**.
2. On the form, fill in the fields.
   For more information, see Idea category form.
3. Select **Submit**.
   An idea category represents a theme for organizing idea submissions. All ideas submitted through the Idea Portal must be associated with at least one idea category. You can use values from an existing table or create new idea categories for organizing your idea. Users select one or more idea categories, configured by an admin, to associate with their idea when they submit it. For more information, see Create an Idea module, and Idea category configuration.

What to do next

Map idea categories with your idea module. For more information see, Configure idea categories.

Adding Idea Portal to Employee Center

Improve engagement experience for your employees by enabling navigation to Idea Portal from Employee Center.

On the Employee Center portal, add the following links to Idea Portal so that employees can easily navigate to it.

Header menu item on the Employee Center portal

Configure a menu item for the Idea Portal page on the Employee Center portal header. Follow steps 1 through 5 in Create employee forum menu item in the Employee Center menu.

Quick link on the Employee Center portal

Create a quick link to the Idea Portal page using the quick links module in Employee Center. Follow the procedure in Create a quick link.

Related topics

Managing ideas using Innovation Management

Managing Idea Portal

Analyzing idea metrics using Idea Manager dashboard

Integrating Innovation Management with Universal Request

Analyzing idea metrics using Idea Manager dashboard

Review, analyze, and manage your ideas effectively by using the Idea Dashboard manager.

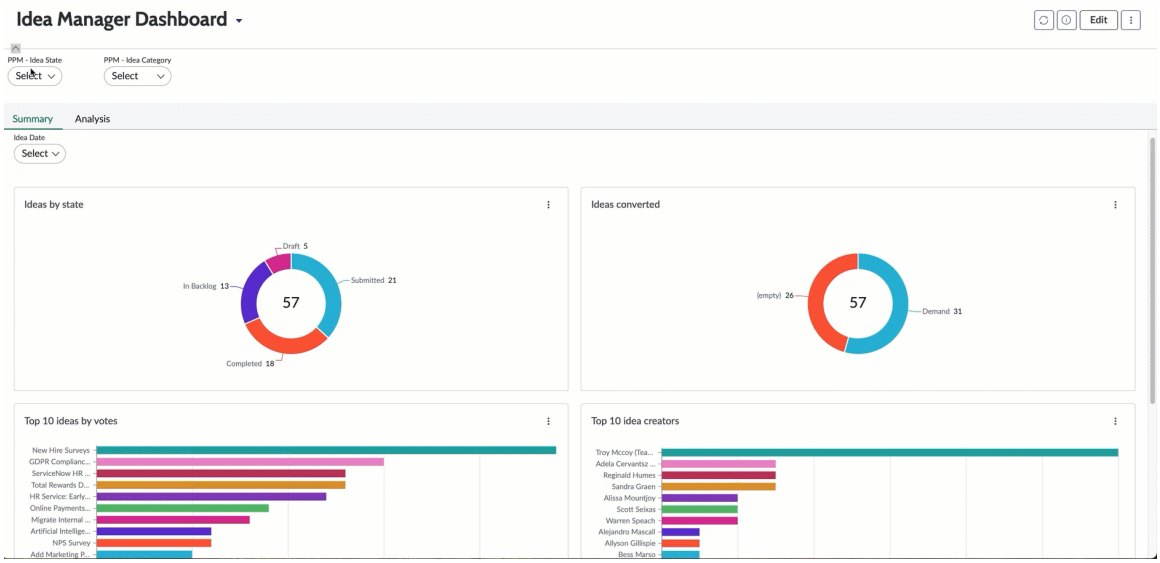
The Idea Manager dashboard provides summary of idea metrics and trends such as ideas in different states, age of ideas, categories, and ideas converted to different work entities.

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Note:
Starting with version 2.0.0, the Idea Manager dashboard is available in the Next experience UI Framework which can be accessed from Analytics Idea Manager. The Ideas pane in **Analysis** tab is not supported in the Next experience.

Idea Manager dashboard in Next experience UI

The Idea Manager dashboard provides comprehensive reports to the idea manager and users with read-only roles for ppm (sn_ppm_read). The dashboard uses Performance Analytics to provide a trend of historical data as well as regular reports. It provides you an overview of ideas, number of ideas converted into work entities, and trends based on categories, idea submitters, and votes. It helps you to review and analyze ideas and enables you to take required actions for managing your ideas effectively.



End user and roles

End user and goal	Required role
Idea Manager - Needs visibility into ideas in different states, number of ideas created, and age of ideas.	idea_manager
Read only roles for PPM - Needs visibility into ideas in different states, number of ideas created, and age of ideas.	sn_ppm_read

Use case

The dashboard displays ideas related to Project Portfolio Management.

Only ideas associated with categories are displayed in the dashboard. Ideas marked for deletion are not displayed. By default, the dashboard displays one-year data. Use the interactive date filter to view monthly, quarterly, or yearly data.

You can drill down within an idea indicator data for further analysis by navigating to Idea Portal from the dashboard. For example, to view individual records of Open ideas in the Idea Portal, click the **Open ideas** indicator value to open the Analytics Hub. In the Analytics Hub, click **Show Records** to view the list of open ideas, open an idea in the form view, and then click the **Idea Portal** related link to view the idea record in the Idea Portal.

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Indicators

The Summary and Analysis tabs in the dashboard contain the following indicators. The data for ideas is collected from the [idea] table.

Open Ideas

Count of the ideas that are in Submitted, Need more information, or Under Review state for the current month.

Average Age of Open Ideas

The average age of ideas that are in Submitted, Need more information, or Under Review state since their creation, in days, as calculated by the formula `[[PPM:Total Age of Open Ideas]]/[[PPM:Open Ideas]]/24`.

Ideas Converted

Count of ideas converted into different work entities such as demand, project, story, or epic based on other plugins.

% of Ideas Converted

The percentage of ideas converted into different work entities such as demand, project, story, or epic based on other plugins, as calculated by the formula `[[PPM:Ideas Converted]/[PPM:Active Ideas]] *100`.

Ideas

Count of ideas that are in different states. You can view the count of ideas, in different states, created in week, month, quarter, and year.

Active Ideas

Count of ideas in Submitted, Need more information, Under review, in backlog, planned and in development state. This indicator is not displayed in dashboard but is used in formula.

Total Age of Open Ideas

Total number of days an idea is in state Submitted, Need more information, and Under review before conversion to a work entity. This indicator is not displayed in dashboard but is used in formula.

Breakdowns

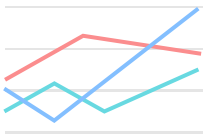
- PPM - Idea Category
- PPM - Idea State

Data visualizations

The dashboard includes the following visualizations:

Title	Type	Description
Ideas by state	Pie chart 	Breakdown of the number of ideas in each of the different states.

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Title	Type	Description
Ideas converted	Pie chart 	Breakdown of the number of ideas converted into work entities such as demand and project.
Top 10 ideas by votes	Horizontal bar chart 	Top 10 ideas based on the total number of up-votes.
Top 10 idea creators	Horizontal bar chart 	Top 10 users based on the number of ideas submitted.
Ideas trended by categories	Line chart 	Trend of the total number of ideas submitted under various categories. The trend is displayed on a monthly basis.
Top 10 categories by ideas	Horizontal bar chart 	Top 10 categories based on the number of ideas submitted under each category.

Integrating Innovation Management with Universal Request

Integration of Innovation Management with Universal Request extends the capabilities of Universal Request and enables your employees and agents to create an idea from a universal request.

Integrate Innovation Management with the Universal Request application to provide a consistent ticketing experience and facilitate inter-department request transfers.

A Universal Request is created from an Interaction Record or New Call record when an agent determines that a new task record must be created for any of the following reasons:

- Resolve the Universal Request immediately without assigning it to a specific department.
- Transfer the Universal Request to a different department by assigning it to a Tier 1 assignment group.

Universal Request serves as a parent record for other records created as child records, such as INC, HRC, and custom task types. It is also used for all cross-departmental reporting. For more information about universal request, see Exploring Universal Request.

Features

The integration provides the following functionalities:

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- Create an idea from a universal request: When a universal request is created, an agent analyses the request. If the request can result in a new product, feature, or change, the agent creates an idea from that universal request.

  The idea manager then reviews submitted ideas and, if necessary, requests more information, and then chooses to accept or reject the idea. Accepted ideas are then converted to a demand, epic, story, or feature.

  The relevant information of the universal request such as details from the **Short description** and **Description** fields are copied to the **Title** and **Idea Description** fields of the idea.

  Also, the idea created from the universal request becomes the primary ticket for the universal request and the **Primary Ticket** field is populated with the idea number.

- Transfer the idea to another department with or without resolution: If the idea is rejected or cannot be implemented, the routing agent can transfer the idea to another department.

  When an idea is transferred to another department, the idea is closed and a new record is created. For example, a universal request related to HR process improvement can be converted to an idea and then transferred to the HR department as an HRC when the idea is deemed not feasible.

  Note:
  When the idea created from a universal request is transferred to another department, the resulting INC, HRC, or custom task becomes the primary ticket for the parent universal request.

Plugin requirements

Activate the following plugins if you have the admin role. These plugins are not active by default, and you must install them to integrate Innovation Management with Universal Request applications.

- PPM Standard plugin (com.snc.financial_planning_pmo).
- Universal Request plugin (com.snc.universal_request). For activation information, see Activate Universal Request.

Activate other related plugins such as Human Resources Scoped App: Core (com.sn_hr_core), and Employee Center (com.snc.employee_center) plugins to facilitate inter-department transfers of ideas.

Create an Idea from Universal Request

Create an idea from a universal request after initial evaluation for a new product, feature, enhancement, or change.

Before you begin

Role required: sn_uni_req.request_write or ITIL

- Activate the Universal Request (com.snc.universal_request) and PPM Standard (com.snc.financial_planning_pmo) plugins

About this task

New idea is created in the **Submitted** state. You can edit your submitted idea in the Idea Portal after it has been submitted until the state is changed to **Completed**.

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Procedure

1. Navigate to **Universal Requests** > **All**.
2. Open the universal request record from which you want to create an idea.
3. Select **Create Idea**.
4. On the form, fill in the fields.
   For more information, see Create an Idea form.
5. **Optional:** If you have attachments related to the idea, select **Add attachments** and attach them.
6. Select **Create**.
   The universal request number from which the idea is created appears in the header of the Idea form. The idea number appears in the **Primary Ticket** field on the Universal Request form.

What to do next

Evaluate an idea and create a task from an idea, if selected for execution. If the idea cannot be implemented, transfer the idea to the relevant department as an INC, HRC, or custom task.

Idea state mapping

Map your idea states to the Universal Request states to provide a better user experience during the idea state transition and to track the progress of the idea.

Before you begin

Role required: admin

About this task

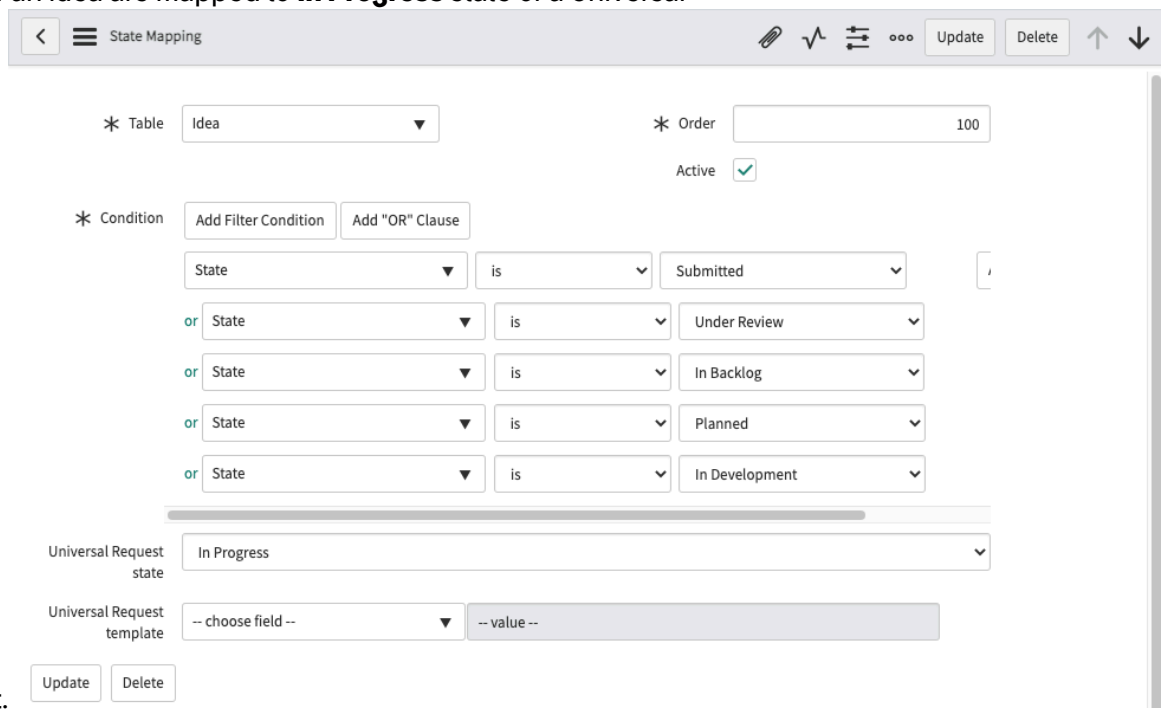
Mapping the states of the idea to the universal request state ensures that the status of idea is also reflected on the state of universal request. As the idea moves through different stages of the life cycle, the state of the universal request also gets updated to reflect the change.

For example, consider a universal request that has an idea attached to it as a primary ticket. When the state of idea changes from **Submitted** to **Need more information**, the state of the universal ticket state is also updated to **Awaiting Response**.

The following image is an example of a default state mapping. The **Submitted**, **Under Review**, **In Backlog**, **Planned** and **In Development**

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states of an idea are mapped to **In Progress** state of a Universal Request.



The following table lists the default mapping of different idea states with the universal request states.

Default mapping of Idea states with universal request states

Idea state	Universal Request state
Submitted	In Progress
Under Review	In Progress
In Backlog	In Progress
Planned	In Progress
In Development	In Progress
Unlikely to implement	Closed
Duplicate	Closed
Already exists	Closed
Completed	Closed
Need more information	Awaiting Response

Procedure

1. Navigate to **All** > **Universal Request** > **Administration** > **State Mapping**.
2. Select **New**.
3. On the form, fill in the fields.
   For more information, see State mapping form.

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Transfer an Idea to another department

Transfer an idea to another department with or without resolution if the idea is rejected or cannot be implemented.

Before you begin

Ensure that the following requirements are met:

- The idea is created from a universal request.
- The idea is associated with a category.
- Personalize the Create an Idea form to add the **Assigned to** field.
- The idea is assigned to an agent.
- Additional plugins required for transfer are active. For example, if the idea is being transferred as an HR case (HRC), activate the Human Resources Scoped App: Core (com.sn_hr_core), and Employee Center (com.snc.employee_center) plugins.

Role required: Agent to whom the idea is assigned or is a part of the assigned work group.

About this task

If the idea is rejected or cannot be implemented, transfer the idea to another department as an HRC, incident, or a custom task.
When an idea is transferred to another department, the idea is closed and a new record is created. For example, a universal request related to HR process improvement can be converted to an idea and then transferred to the HR department as an HRC when the idea is deemed not feasible.

Procedure

1. Navigate to **All** > **Ideas** > **Idea Portal**.
2. Select the title of an idea to view its details.
3. Select the more options icon (···), and then click the **Open in platform** option to open the idea in the form view.
4. Select **Transfer**.
5. In the **Transfer Ticket** dialog box, provide the following details.
   - **Department**: Select the department from the list.
   - **Transfer reason**: Select the reason from the list.
   - **Transfer notes**: A brief description for transferring the idea that you want to pass to the UR Routing agent.
   - **Copy additional comments and attachments**: Clear the check box if you do not want to transfer the idea with additional comments and attachments.
6. Select **Transfer**.
   The idea is transferred to the selected department and the state of the idea is changed to **Unlikely to implement**.
7. Provide information about why the idea was rejected or closed in the **Close notes** field.
8. Select **Update**.

Result

The idea is transferred to the selected department. The **Primary Ticket** field of the parent universal request is updated with the INC, HRC, or custom task number created as a result of the transfer.

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Innovation Management reference

Reference information to provide additional details about Innovation Management such as the fields, user roles, tables, and guidelines.

Form field information for Innovation Management

Field information for forms used in the Innovation Management.

Create an Idea form

Learn about the fields of the Idea form. Use this form to create or edit the details of an idea in Innovation Management.

Create an Idea form fields

Field	Description
Title	Brief description of the idea. As you start typing the title for your idea, the **Related Ideas** section appears and displays existing ideas that potentially match your idea.
Category	The category to associate with your idea. You can select multiple categories for an idea. Categories are also visible to other users in the Idea Portal when viewing submitted ideas.
Description	Detailed description of the idea. Consider including details such as why is it useful, who would benefit from it, and how it would work. You can use the formatting toolbar to format text and add images or web links.

Related topics

- Create an Idea module
- Submit an idea
- View, filter, and sort ideas

Idea Category Configuration form

Learn about the fields of the idea category configuration form. Use this form to create or edit the details of an idea category configuration in Innovation Management.

Idea Category Configurations form fields

Field	Description
Category table	The parent table to derive idea categories from. To use static idea categories, select the default Idea Category [im_category] table. To use dynamic idea categories, select an existing table. For example, to use department names as idea categories, select the table that contains details of all the departments.

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Idea Category Configurations form fields (continued)

Field	Description
Category Field	Field from the category table from which to derive the idea category. The corresponding value of this field in the category table is listed in the **Category** field on the Idea Portal. For example, to list department names as category options, set the value of this field to **Name**. The system searches for and fetches the department names from the parent table and lists all the department names as category options.
Parent Field	If you are using nested idea categories, specify the field in the category table to be used to fetch the parent category. **Note:** Leave this field blank if you are not using nested idea categories. For example, to list Department 1 and 2 as subcategories of Department A, set the value of this field as **Parent**. The system searches for and fetches values from the parent table and lists Department 1 and 2 as subcategories of Department A.
Module	The Idea module to which this idea category belongs.

Related topics

Configure idea categories

Idea category form

Learn about the fields of the Idea category form. Use this form to create or edit the details of an idea category in Innovation Management.

Idea Category form fields

Field	Description
Category name	Name for the idea category. Use a name that clearly identifies the entity for which you are creating the category list. For example if you are creating a category option for your departments, use the department name such as HR, Support, and IT.
Active	Option for activating the idea category. If activated, the idea category appears in the Create an Idea form and the Category list of the Idea Portal.

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Idea Category form fields (continued)

Field	Description
	Default: Selected
Module	The module to which this idea category belongs.
Parent	The parent idea category for which this category is a subcategory. For example, to list Department 1 and 2 as subcategories of Department A, select Department A in the **Parent** field for Department 1 and 2.
Domain	The domain to which the idea category belongs.

Collaborate on idea

Learn about the actions of the collaborate on an idea form. Review the idea details and then choose which action to perform on the idea. Collaborate on an idea with other submitters and stakeholders. Add comments or reply to comments to request more information or answer questions. Vote for the ideas you would like to see developed.

Collaborate on an idea

Action	Steps
Post a comment	1. Select the comment (Comment) icon and enter your comment. 2. Select **Comment** to post your comment.
Reply to a comment	1. Select the reply (Reply) icon and enter your reply. 2. Select **Reply** to post your reply.
Edit or delete your comment	You can edit or delete your comment until the idea reaches the **Completed** state. 1. Navigate to the comment. 2. Select the more options (···) icon, and then select **Edit** or **Delete**.
Vote on an idea	Votes help in assessing the popularity of and demand for an idea.

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Collaborate on an idea (continued)

Action	Steps
	• Select the up-vote icon ( ) to indicate support for the idea. • Select the down-vote icon ( ) to indicate dislike of the idea.
Subscribe to an idea	Select **Subscribe**.

Related topics

Collaborate on ideas

Manage ideas

Learn about the actions of the manage ideas form. Review the idea details and then choose which action to perform on the idea.

Manage ideas

Action	Steps
Change the title	If you need to change the title of an idea for more clarity or accuracy, do one of the following actions: **1.** Enter a new title in the **Title** field. **2.** Select the **Suggestions** ( ) icon to select from the list of predefined titles.
Change the state	Change the state of an idea as it moves through different stages of the life cycle. Changing the state of an idea also helps keep the submitter and subscribers of the idea informed. In the State list, select an appropriate state based on the status and priority of the idea. The following options are available: • **Submitted**: Default state when the idea is submitted. • **Under Review**: Pending review from the idea or demand manager. • **Need more information**: More information is required before the idea is promoted and prioritized for development. • **In Backlog**: Accepted but put on hold for possible development in the future.

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Manage ideas (continued)

Action	Steps
	• **Planned**: Accepted, and a project, demand, epic, feature, or story is created from the idea for current implementation. • **In Development**: Work has started on the task created from the idea. • **Unlikely to implement**: Does not meet requirements, is not feasible, or is not popular. The idea becomes inactive and closed for comments and votes. • **Duplicate**: A similar idea exists in the database. The duplicate idea becomes associated with the original idea and is inactive and closed for comments and votes. • **Already exists**: Already developed at the time of idea submission or is close to being developed.
Mark as a duplicate	When you mark an idea as a duplicate, one idea is marked as the **Original idea** and the other as a **Duplicate idea**. A comment is logged in both the ideas with this information. The idea marked as a duplicate becomes inactive and closed for comments or votes. 1. In the State list, set the status of the idea to **Duplicate**. 2. Search for and select the idea that you want to mark as original in the **Duplicate** field. 3. Enter a justification in the **Close notes** field.
Delete an idea	Remove an idea from the database when it is no longer relevant or becomes old. Deleting an idea removes all its details such as comments, attachments, and votes from the database. To delete an idea and all the details associated with it: • Select the idea. • Select **Delete**.

Related topics

Manage ideas

Evaluate ideas

Learn about the actions of the evaluate ideas form. Review the submitted ideas and then choose which action to perform on the idea. You can analyze the submitted ideas and then accept or reject them.

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Evaluate ideas

Action	Steps
Accept	If the idea seems interesting with the potential for developing into a new feature, product, or enhancement, accept the idea. It then moves to the backlog, from which you can pick it up at an appropriate time. To accept an idea, set the status of the idea to **In Backlog** from the State list. If you want to implement the idea relatively soon, create a task for it. For more information, see Create a task for an idea.
Request more information	If the information provided with the idea at the time of submission is insufficient request more information about the idea by setting the status **Need more information** from the State list.
Reject	If an idea is not feasible or has been already implemented, reject the idea by setting its state to **Unlikely to implement** or **Already exists**. The idea becomes inactive and is closed for comments and votes.
Close an idea when implemented	When an idea is implemented successfully, mark the idea as completed and close the idea for further comments and vote. To mark an idea as completed: 1. Set the status of the idea to **Completed** from the State list. 2. Provide information about how the idea was implemented in the **Close notes** field.

Related topics

Evaluate an idea

Idea module form

Learn about the fields of the Idea module form. Use this form to create or edit the details of an idea in Innovation Management.

Idea module form fields

Field	Description
Module name	Name for the module. Use a name that clearly identifies the entity for which you are creating the module. For example if you are creating a module for your departments, use the department name such as HR, Support, and IT.

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Idea module form fields (continued)

Field	Description
Module Id	Unique identifier for the module used as a parameter in the Idea Portal URL to direct users. For example, if you use **hr** as the **Module Id**, the URL to access the Idea Portal would look like the following example: `/idea/?id=ideas_list&sysparm_module_id=hr`
Idea table	The table to be used to store ideas. This table must extend the Idea [im_idea_core] table.
Enable downvote	Option for activating the ability to down-vote an idea. Default: Selected
Active	Option for activating the idea module. Default: Selected
Category Limit	The maximum number of categories a user can select while submitting an idea. Default: 5 This field does not appear by default on the Idea module form so you must add it by personalizing the form.

Related topics

Create an Idea module

Demand Management

The Demand Management application consists of tools for capturing, centralizing, and assessing strategic and operational demands. It also provides a single location for managing all the demand information.

Demand Management overview

Get started

Explore



Learn the features and business value of Demand Management

Configure



Learn how to configure Demand Management

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Use	Reference
	
Create and manage demands with Demand Management	Learn about the forms and fields of Demand Management

Troubleshoot and get help

- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

A typical workflow for you as the demand manager is as follows:

- Work on a demand to assess the feasibility, effort, and cost of the demand and create a business case for approval of the demand.
- Create demand tasks, such as an initial feasibility review, cost estimate, and effort estimate, to delegate activities to specialized resources or groups. For example, a demand manager can create demand tasks for assessing the cost associated with a software upgrade and the resources required.
- Assign demand tasks to a business analyst, resource user, or an appropriate group. The assigned resource or group then creates a cost plan and resource assignment to help the demand manager assess and qualify the demand. For more information, see Demand tasks.

Basics of Demand Management

- Set up the application: Plan, create stakeholders and assessment categories, and create bubble charts.
- Assess ideas: Review and analyze submitted ideas before promoting ideas to demands.
- Create and add details to the demands: Create demands and add demand tasks, stakeholders and assessments, and evaluate and qualify demands.
- Use the Demand Management application or the demand workbench to compare and assess demands, and promote demands to projects, enhancements, changes, or defects.

Exploring Demand Management

Learn more about Demand Management and its process flow, and reviewing its benefits to your organization.

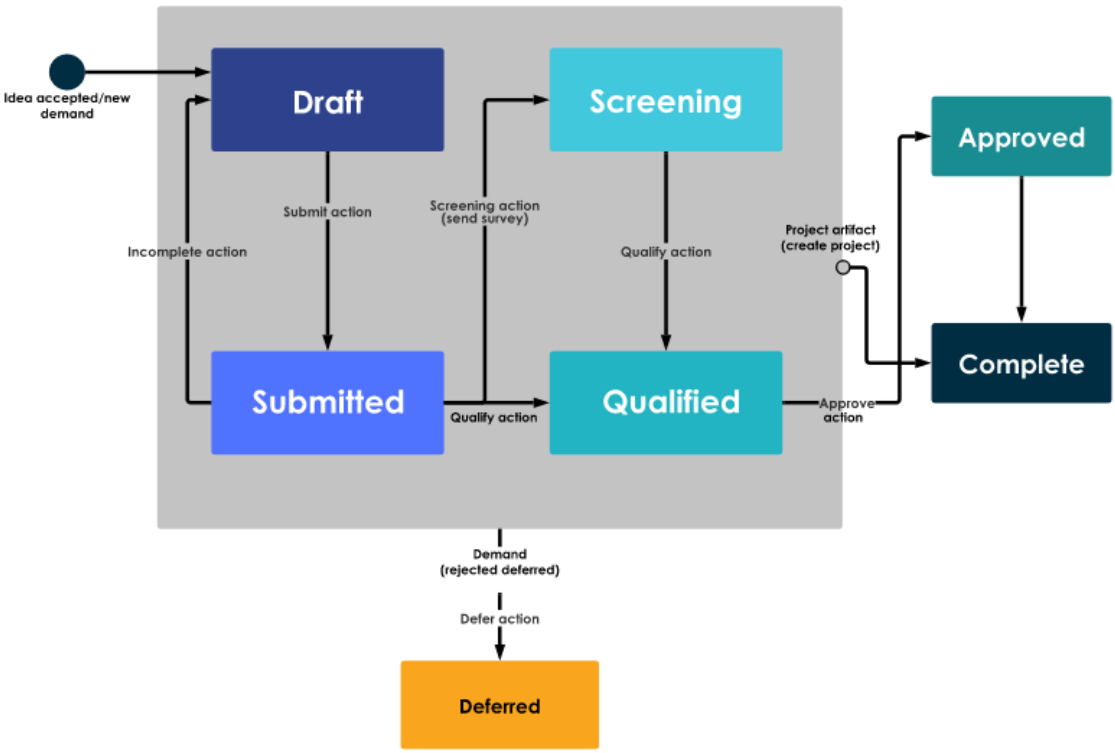
Demand Management overview

In Demand Management assess the ideas submitted through the Idea Portal or ideation module and promote the feasible ideas to demands. Track the progress of an accepted idea as it moves through the demand life cycle (idea to a demand, to a project, enhancement, change, or defect).

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Demand Management workflow

In demand management, a demand can be in any of the following



states.

The demand states are Draft, Submitted, Screening, Approved, and Completed. For more information, see Use Demand Management.

Demand Management benefits

Benefit	Feature	Users
View and assess ideas that have been approved to be demands in a central location.	Demand workbench	Demand Manager
Track the progress of an accepted idea as it moves through the demand life cycle (idea to a demand, to a project, enhancement, change, or defect).		
Manage and track the financials of your demands in corporate, regional currency, or the same currency that you want to use for managing the project	Multicurrency in Demand Management	Demand Manager
Add users to the stakeholder registry so that demand and project management can automatically populate the stakeholder list when a user creates a demand or project.	Populate the stakeholder registry	Demand Manager

Demand Management process flow

The Demand Management process flow consists of the following tasks.

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Demand Management Process Flow

Task	Description
Submitting ideas	Any user can submit ideas from the following locations: • **Service Catalog** > **Can We Help You** > **Submit Idea**. • **Self-Service** > **Ideas** > **Create New**. **Note:** Submitters or collaborators can edit their ideas as long the idea is in the Submitted state.
Creating demands	Demand managers and demand users can create demands using the Demand Management application. Alternatively, any user can create demands from the following locations: • **Service Catalog** > **Can We Help You** > **Create a new demand**. • **Self-Service** > **Demands** > **Create New**. **Note:** Requesters or collaborators can edit their demands as long as the demand is in the Draft state.
Adding details to demands	Demand managers can add details to a demand request by adding demand tasks, stakeholders, requirements, risks, decisions, and resource assignments.
Assessing demands	Decision makers can use assessment results and the demand backlog when determining which demands to approve or reject. Demand managers can decide if the assessment should be triggered for the demand using the **Assessment Required** field on the demand form.
Completing demands	Demand managers can set a demand to Completed when work on the demand is complete.

Demand workbench

The demand workbench provides a central location for viewing and assessing business demands.

The demand workbench makes it easy to manage demands by presenting multiple interactive views of demand information on one page. The workbench is split into two panes: the top pane presents an interactive bubble chart for assessing demands and the bottom pane displays the demand details in a list view.

The demand workbench provides real-time interaction between the two panes. Modifying a demand in the bubble chart automatically updates the values in the demand record. Similarly, changes made to a demand record are automatically reflected in the bubble chart.

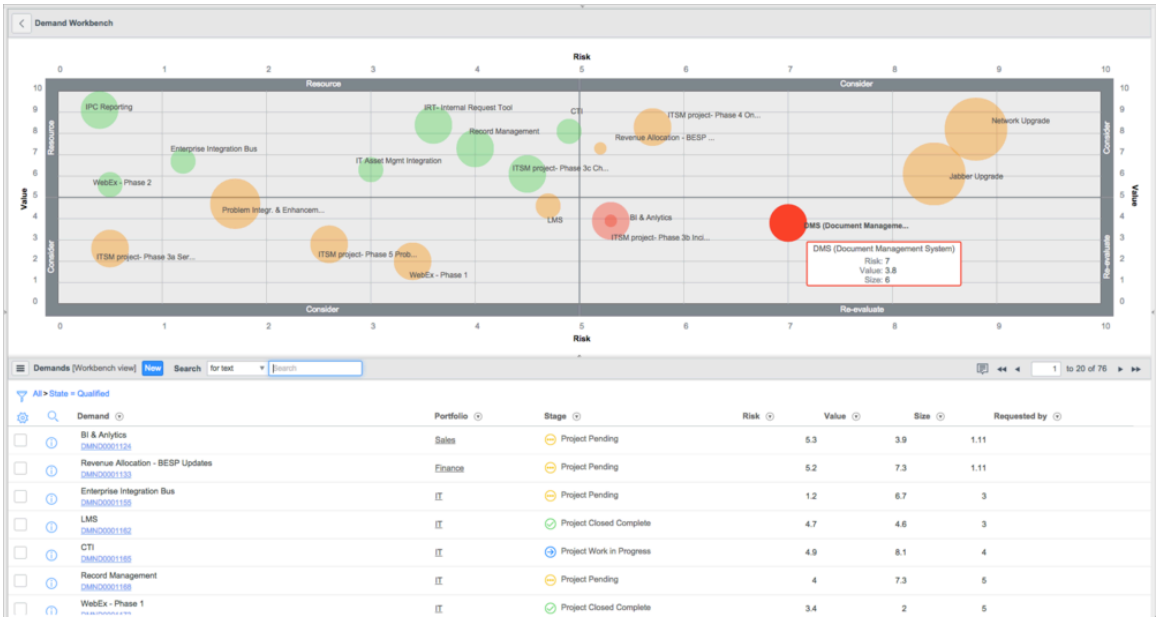
By default, the workbench displays demands screened by stakeholders or qualified by the demand manager. With the demand manager role, you can use the workbench to:

- View, evaluate, and update demands
- Create demands
- Create artifacts from demands, including projects, enhancements, changes, and defects

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With the demand manager role, you can view and evaluate demands.

Demand Workbench



The demand workbench includes the following components:

- The top pane displays demands in a bubble chart.
- The bottom pane displays demands in a list view.
- The header includes a back button ( ) that opens the Demands list.

Demand workbench bubble chart

The interactive bubble chart on the demand workbench is a dynamically updated graph that plots metrics for multiple demand records.

Demand managers can use bubble charts to visualize, compare, and evaluate the relative standing of demands in three categories: risk, value, and size. The X-axis represents the risk of a demand, the Y-axis represents the value, and the Z-axis represents the size. Demands are plotted as circles, or bubbles, which vary in size according to the size of the demand. All three measurements are based on values between 0 through 10. This scale allows demand managers to see how one demand compares to other demands in the chart.

The bubble chart contains four quadrants, with each quadrant representing the value versus risk tradeoff for the demand. The quadrants are labeled along the edges of the bubble chart to represent this combination of value versus risk. The color of the bubbles displayed in each quadrant also represents the value versus risk tradeoff.

- The upper left quadrant, labeled **Resource**, contains demands with high value and low risk. Green bubbles represent demands in this quadrant.
- The lower left and upper right quadrants, labeled **Consider**, contain demands that require further evaluation. The lower left quadrant contains demands with low risk but low value while the upper right quadrant contains demands with high value but high risk. Orange bubbles represent demands in these quadrants.
- The lower right quadrant, labeled **Re-evaluate**, contains demands with low value and high risk. Red bubbles represent demands in this quadrant.

Each bubble also includes a label with the name of the demand.

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From the demand workbench bubble chart, you can perform the following actions:

- Point to a bubble to view a summary of the demand, including the demand name and the risk, value, and size.
- Click a bubble to open a sizing window and change the size of the demand.
- Click and drag a bubble to increase or decrease the risk or value of the demand.
- Right-click a bubble to view the demand, create an artifact, or view an artifact that has been created from a demand.

> **Note:**
> You will not find the options to create an enhancement or a defect if Agile Development 2.0 is not activated.

Changes made to a demand in the bubble chart are automatically updated in the demand record.

Demand workbench list view

The lower pane of the demand workbench displays a list of the demands shown in the bubble chart.

The bubble chart list view displays up to 20 demands at a time. Page forward and back through the list to display additional demands.

The **Demand** column displays the demand number which provides a link to the Demand form. The **Stage** column displays the status or progress of the demand. For more information, see Stage Fields.

The interactive bubble chart is updated whenever you change a demand in the list view. If you create a new demand from the demand workbench, it is created in a qualified state and appears on the bubble chart. When a demand is promoted to a project, enhancement, change request, or defect, it is removed from the bubble chart.

Performing the following tasks in the list view affects the demands displayed in the bubble chart:

- Searching or filtering the records in the list view displays the bubbles for those demands that meet the search or filter criteria.
- Adding or deleting records in the list view adds or deletes the corresponding bubbles.
- Paginating the list view by clicking any of the page arrow icons displays the bubbles for the demands that appear on the current page.

Predictive Intelligence for Demand Management

The Predictive Intelligence for Demand Management capability uses machine-learning algorithms to search and display similar demands while creating a demand in the Demand form.

The PPM Predictive Intelligence Workbench includes a prebuilt use case template that systematically guides you through the process of creating and training new predictive models, evaluating and testing them, and finally adding them to your business process to add value to your Idea, Demand, and Project Management.

Once you train your custom use cases, they are usable immediately. No prior knowledge or experience with artificial intelligence or machine learning is required when you use the PPM Predictive Intelligence Workbench.

The application includes templates with prebuilt guidance to assist you in creating, training, evaluating, testing, and producing your unique predictive models.

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Predictive Intelligence for Demand Management has the following benefits:

- Improves the quality of your database by avoiding duplicate demands.
- Helps you in planning your demand. You can view details of similar demands that were submitted and executed in the past.

Activation information

Activate the following plugins before using the Predictive Intelligence Workbench:

- Predictive Intelligence for PPM (com.snc.ppm_ml) plugin
- Predictive Intelligence for Ideation (com.snc.innovation_management_ml) plugin

Solution definition for Predictive Intelligence for Demand Management

The solution definition for Predictive Intelligence for Demand Management capability is available in the Predictive Intelligence for PPM plugin (com.snc.ppm_ml). For more information about Predictive Intelligence, see Predictive Intelligence and Contextual search.

Solution Definition for Demand Management

Solution Definition	Solution Type	Description
Similar Demands **Note:** This solution definition is available as a template on instances where the following plugins are active: • Predictive Intelligence for Contextual Search plugin (com.snc.contextual_search_ml) • PPM Standard plugin (com.snc.financial_planning_pmo) • Predictive Intelligence for PPM plugin (com.snc.ppm_ml)	Similarity	View similar demands based on the **Demand Name** and **Description** fields. You can see the results in the **Similar demands** section on the Demand form.

Related topics

Predictive Intelligence

Train the similarity solution for Demand Management to find similar demands

Create a demand

Configuring Demand Management

Configure your Demand Management application to assess and promote demands to projects, enhancements, changes, or defects.

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Configuration overview

Multicurrency in Demand Management

Manage and track the financials of your demands in the corporate currency, regional currency, or the same currency that you want to use for managing the project using the multicurrency feature. The corporate policy typically governs the choice of this preference.

In a global or multinational organizations, demands are often managed and tracked at one geographic location and executed at a different geographic location. As each location might use a different currency to spend the budget, this difference in geographic location makes it difficult to monitor and track financials for such demands.

The multicurrency feature in Demand Management makes it easier for you to manage and track your demands from any geographical location in any currency. You can monitor and track the financials of your demands in one currency and spend the budget in a different currency such as functional currency, regional currency, or a currency that you want to later use to manage your projects. You can also choose to manage your demands in one currency and specify a different currency for managing your future projects.

Activation information

Activate the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin to enable the multicurrency features in Demand Management. Activating the plugin enables the demand currency view in demand, cost plans, and benefit plans forms. With the demand currency view, you can manage your simple demand financials, cost plans, benefit plans, and budgets in the demand currency.

Note:
Activating this plugin automatically activates the PPM Standard (com.snc.financial_planning_pmo) plugin and therefore you get the option to switch between the default view and the demand currency view.

Currency Preferences

After activating the multicurrency plugin, specify your currency preference for managing your demand financials. You can select your functional currency, a regional currency, or a local currency. For more information, see Select demand currency preference.

Demand currency view

In addition to the default view in the Demand form, the Demand Currency view enables you to view the multicurrency fields. You can enable this view from the form context menu.

You can designate a currency other than the functional currency as the processing Demand Currency for a demand. The **Financials** tab of the Demand form has the **Demand currency** field. You can select an active currency from the Currencies [fx_currency] table.

Note:

The **Demand currency** field of a demand becomes read-only once you create a cost plan, cost plan breakdown, benefit plan, or benefit plan breakdown for the demand.

Multicurrency in Demand Tasks

Track the expenses incurred while performing the demand tasks in demand currency. When the time card for a demand task is submitted and processed, the actual cost is calculated based on the rate model, the default labor rate, or the rate defined in the system property. You can view

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this actual cost in the Demand Task form in the **Demand currency** and **Actual cost in demand currency** fields. For more information, see Demand tasks.

Multicurrency in Demand Baseline

Compare the financial baselines of your demands to track the performance of a demand over time. Baseline comparison enables you to identify and review the financial changes made to the demand at various stages of the demand life cycle. With the multicurrency feature, you can view the financial information in the demand currency when you compare the baselines. You can also configure the baseline view to add additional fields and view details in demand currency. For more information, see Compare financial baselines of a demand.

Select demand currency preference

Set your currency preference to use for managing and tracking the financials of your demands from the functional currency, regional currency, or local currency.

Before you begin

Activate the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin.

Role required: admin

Procedure

1. Navigate to **All** > **Project Administration** > **Settings** > **Preferences-Project**.
2. Select a currency option for managing your demands from the Demand currency setup list.
3. Click **Save**.

What to do next

Enable the multicurrency view in the Demand and other demand-related forms. For more information, see Enable demand currency view.

Enable demand currency view

Switch to the demand currency view to track the planned costs of a demand in the selected currency.

Before you begin

Activate the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin.

Role required: admin or it_demand_manager

About this task

To manage your demands in currency different than the functional currency, the demand currency fields are added in the following tables that have the cost details and financials tab:

Tables with demand currency fields

Table name	Description
Demand [dmn_demand] table	Track a demand in a different currency. Create a demand and select another currency by navigating to the **Financial** tab and selecting a currency in the **Demand Currency** field. To create a demand, see Create a demand.

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Tables with demand currency fields (continued)

Table name	Description
Demand Task [dmn_demand_task] table	Demand tasks are used to delegate the cost, effort, risk, and benefit assessment activities. To create a demand task, see Create a demand task.
Cost Plans [cost_plan] table	Cost plans capture the costs of demands. To navigate to the Cost Plan form, see Create a demand cost plan.
Cost Plan Breakdown [cost_plan_breakdown] table	Cost plan breakdowns specify the estimated cost and actual cost at a granular level for a fiscal period. To navigate to the Cost Plan Breakdown form, see Create a demand cost plan.
Benefit Plan [benefit_plan] table	If you open the demand form in **Demand Currency** view, then by default the fields related to the demand currency appear in the Benefit Plans related list. To create a demand benefit plan, see Create a monetary benefit plan for a demand.
Benefit Plan Breakdowns [benefit_plan_breakdown] table	Benefit plans capture the potential benefits accrued by the demand when the demand is executed. To update a benefit plan breakdown, see Create a monetary benefit plan for a demand.
Expense Line [fm_expense_line] table	Expense lines are part of the demand cost plans and stores cost associated with a specific resource. To navigate to the Expense line form, see Create an expense line for a demand.
Project Funding [project_funding] table	Stores the demand target and budget expense values for both capital and operating expenses for a single fiscal period. To allocate the budget for a demand, see Allocate budget to a demand.

Procedure

1. Navigate to the respective form.
2. Right-click the context menu of the form.
3. Click **View**.
4. Select **Demand Currency** from the list.

What to do next

Refer to the form fields that are exclusive to the **Demand Currency** view that you have selected. All the other form tabs and fields remain the same both for the default view and the demand currency view. Continue to enter values in the fields as you would for the default view.

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Multicurrency fields in demand-related forms

When you enable the **Demand Currency** view in a Demand, Cost Plan, and Cost Plan Breakdown forms, you can observe the multicurrency fields in the Financials section of the forms.

Financials tab of the demand form

Demand form

Field	Description
Demand currency	Currency in which you want to manage and track the demand. **Note:** The ability to select a demand currency depends on the currency option you selected in **Preferences-Project** under **Project Administration**. For more information, see Select demand currency preference. The **Demand currency** field of a demand becomes read-only once you create a cost plan, cost plan breakdown, benefit plan, or benefit plan breakdown.
Project currency	Currency in which you want to implement the project when this demand is converted to a project. **Note:** The **Project currency** field in the Project form of Project Management is carried over from the demand when it is converted.
Capital expense in demand currency	Capital expenditure (Capex) for the demand.
Capital budget in demand currency	Total capital budget allocated to the demand across all fiscal years. The value is rolled up from the capital expenditure (Capex) budget of the demand.
Operating expense in demand currency	Operational expenditure (Opex) for the demand in the selected demand currency.
Operating budget in demand currency	Total operational budget allocated to the demand across all fiscal years in the selected demand currency. The value is rolled up from the Opex budget of the demand.

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Demand form (continued)

Field	Description
Total planned cost in demand currency	Estimated cost of the demand in demand currency.
Financial return in demand currency	Estimate of the revenue based on the **Total planned costs in demand currency** and **Financial benefit in demand currency** fields.
Financial benefit in demand currency	Estimate of revenue if the demand is approved in the selected demand currency. This value is rolled up from the benefit breakdown of the demand.
Net present value in demand currency	Present value of future cash based on the given annual interest rate in the selected demand currency. It is a measure for comparing money spent today against future expected financial benefits. It helps when evaluating the overall investment performance.
Actual cost in demand currency	Total cost incurred while working on a demand and demand tasks in the selected demand currency.

Multicurrency fields of the Demand Task form

Demand Task form

Field	Description
Demand currency	Currency that you specified in the **Demand currency** field of the Demand form.
Actual cost in demand currency	Total cost incurred while working on a demand tasks in the selected demand currency. Actual cost comes after the assignee of the demand task creates and submits a time card. When the time card is approved, the resource rate, derived from the rate card, labor rate, or system properties, is used to populate this field.

Financials section of the Cost Plan form

Cost Plan form

Field	Description
Demand currency	Currency that you specified in the **Demand currency** field of the Demand form.

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Cost Plan form (continued)

Field	Description
Cost in demand currency	Value that is rolled up from the **Entered cost** field of all cost plan breakdowns.

Note:
Any change that you make to the unit cost, quantity, or fiscal period of a cost plan has the amounts recalculated in demand currency. See Cost plan updates and cost recalculation in demand currency.

Multicurrency fields in the Cost Plan Breakdown form

Cost Plan Breakdown form

Field	Description
Demand currency	Currency that you specified in the **Demand currency** field of the Demand form.
Cost in demand currency	Breakdown amount in demand currency.
Demand currency exchange rate	Rate in effect for the period corresponding to the cost plan breakdown in the demand currency.
Demand currency exchange rate date	The reference date on which the currency exchange rate is applied for conversion.

Financials section of the Benefit Plan form

Benefit Plan form

Field	Description
Demand currency	Currency that you specified in the **Demand currency** field of the Demand form.
Benefit in demand currency	Benefit incurred from demand in demand currency.
Actual benefit in demand currency	Actual benefit value rolled up from the actual benefit in the benefit breakdown.

Multicurrency fields in the Benefit Plan Breakdowns form

Benefit Plan Breakdowns form

Field	Description
Demand currency	Currency that you specified in the **Demand currency** field of the Demand form.
Benefit in demand currency	Benefit incurred from demand in demand currency.

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Benefit Plan Breakdowns form (continued)

Field	Description
Demand currency exchange rate	Rate in effect for the period corresponding to the benefit plan breakdown in demand currency.
Demand currency exchange rate date	The reference date on which the currency exchange rate is applied for conversion.

Multicurrency fields in the Expense Line form

Expense Line form

Field	Description
Demand currency	Currency that you specified in the **Demand currency** field of the Demand form.
Amount in demand currency	Expense cost in demand currency. Amount entered in the Amount field is converted to demand currency.

Multicurrency fields in the Demand Budget form

Demand Budget form

Field	Description
Capex budget in Demand Currency	Planned expense amount allocated for capital expenditure in the selected currency.
Opex budget in Demand Currency	Operating expense amount in the selected currency in the selected currency.
Total Budget in Demand Currency	Sum of Capex and Opex amounts in the selected currency.

Allocate demand budget in demand currency

Set the capital expense (Capex) and operating expense (Opex) budgets in demand or functional currency according to the fiscal years. The sum of the Capex and Opex budgets is calculated as the total budget in demand currency.

Before you begin

Role required: it_demand_manager

About this task

Allocate the budget in a similar manner as you do with functional currency. For more information, see Allocate budget to a demand.

Enable the **Demand Currency** view in the Demand form to allocate the budget in demand currency.

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Procedure

1. Navigate to **All** > **Demand** > **Demands** > **All**.
2. Select the demand to which you want to allocate the budget.
3. Select the **Create Demand Budget** related link of the Demand form.

   The **Demand Budget** dialog box opens.
4. On the Demand Budget dialog box, fill in the fields.
   For detailed description of the field names, see Demand Budget form.
5. Select **OK**.

Result

The demand budget for the selected year appears in the Demand Budget related list. Select the amounts in the list to revise them.

Cost plan updates and cost recalculation in demand currency

Updating the unit cost, quantity, or fiscal period of a cost plan updates all the related amount fields in the cost plan and its breakdowns. Also, the amounts in the related fields of the demand, to which the cost plan is rolling up, are recalculated and reflected in the demand currency.

Changes in Unit cost, Quantity, and Recurring check box of a cost plan

When you change the values of any of these fields in the Cost Plan form with multicurrency view enabled, the following values are recalculated:

- When you modify the **Unit cost** field, **Quantity** field, or **Recurring** check box of the Cost Plan form, the total planned cost is recalculated in demand currency.
- The **Cost in demand currency** in the Cost Plan Breakdown is also recalculated.
- The values in the **Capital expense in demand currency**, **Operating expense in demand currency**, and the **Total planned cost in demand currency** fields of the demand are recalculated.

Changes in the fiscal period of a cost plan

When you change the fiscal period, either the start date or end date in the Cost Plan form, the following values are recalculated:

- The **Total planned cost** and the **Cost in demand currency** of the cost plan are recalculated. Therefore, the Cost Plan Breakdown records may be added or removed.
- If the **Recurring** check box is not selected, then the **Cost in demand currency** of each Cost Plan Breakdown record is recalculated.
- The values in the **Capital expense in demand currency**, **Operating expense in demand currency**, and the **Total planned cost in demand currency** fields of the demand are recalculated.

Changes in the entered cost of a cost plan breakdown or manual addition of a breakdown

When you change the entered cost in an individual Cost Plan Breakdown record or manually add cost plan breakdowns to a cost plan, the following values are recalculated:

- The **Total planned cost** of the cost plan is recalculated in demand currency.
- The values in the **Capital expense in demand currency**, **Operating expense in demand currency**, and the **Total planned cost in demand currency** fields of the demand are recalculated.

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Benefit plan updates and recalculation in demand currency

Updating the entered currency, entered benefit, offset type, or the fiscal period of a benefit plan also updates all related amount fields in the benefit plan and its breakdowns. Also, the amounts in the related fields of the demand, to which the benefit plan is rolling up, are recalculated and reflected in demand currency.

Changes in Entered currency, Entered benefit, and Recurring check box of a benefit plan

When you change the values of any of these fields in the Benefit Plan form with multicurrency view enabled, the following values are recalculated:

- When you modify the **Entered currency** field, **Entered benefit** field, or **Recurring** check box of the Benefit Plan form, the total planned benefit is recalculated in demand currency.
- The **Benefit in demand currency** in the Benefit Plan Breakdown is recalculated.
- The value in the **Financial benefit in demand currency** field of the demand is recalculated.

Changes in the offset type of a benefit plan

When you change the offset type for the benefit plan, either the start date or end date and specify the offset period and duration of such periods in the Benefit Plan form, the following values are recalculated:

- The **Total planned benefit** and the **Benefit in demand currency** of the benefit plan are recalculated. Therefore, the Benefit Plan Breakdown records may be added or removed.
- If the **Recurring** check box is not selected, then the **Benefit in demand currency** of each Benefit Plan Breakdown record is recalculated.
- The value in the **Financial benefit in demand currency** field of the demand is recalculated.

Changes in the fiscal period of a benefit plan

When you change the fiscal period, either the start date or end date in the Benefit Plan form, the following values are recalculated:

- The **Benefit in demand currency** and the **Total planned benefit** of the benefit plan are recalculated. Therefore, the Benefit Plan Breakdown records may be added or removed.
- If the **Recurring** check box is not selected, then the **Benefit in demand currency** of each Benefit Plan Breakdown record is recalculated.
- The value in the **Financial benefit in demand currency** field of the demand is recalculated.

Changes in the entered benefit of a benefit plan breakdown

When you change the entered benefit in an individual Benefit Plan Breakdown record, the following values are recalculated:

- The **Benefit in demand currency** of the benefit plan is recalculated in demand currency.
- The value in the **Financial benefit in demand currency** field of the demand is recalculated.

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Quick start tests for Multicurrency in Demand Management

Validate that the multicurrency in Demand Management still works after you make any configuration change such as applying an upgrade or developing an application. Copy and customize these quick start tests to pass when using your instance-specific data.

Danger:
By default, the system property that is used to run automated tests is disabled to prevent you from accidentally running these tests on a production system. To avoid data corruption or an outage, run tests only on development, test, and other non-production instances. See Enable or disable executing Automated Test Framework tests.

Demand currency quick start tests require activating the PPM Standard Multicurrency – ATF Tests plugin (com.snc.ppm_multicurrency.atf).

Demand currency test suite tests

Test	Description	Release version
Verify cost in demand currency on cost plan	Validate the calculation of cost plan breakdown with budget reference rate and verify the roll up to cost plan in demand currency.	Quebec
Verify benefit in demand currency on benefit plan	Validate the calculation of benefit plan breakdown with budget reference rate and verify the roll up to benefit plan in demand currency.	Quebec

Related topics

Quick start tests

Upgrade existing demands

Execute scheduled jobs to upgrade your existing active and inactive demands, respectively, after activating the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin.

Before you begin

Activate the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin.

Role required: admin

About this task

Run these scheduled jobs on demand to upgrade your existing active and inactive demands in demand currency only when necessary.

Note:
The jobs may have performance impact depending on the number of demands and cost plans, hence run the jobs only when necessary.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Execute a scheduled job to upgrade your existing active and inactive demands.

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Set up Demand Management

Perform these tasks to set up Demand Management.

Before using Demand Management, PPS admin performs several setup tasks.

Planning for Demand Management

Plan the listed items before setting up Demand Management.

Demand Management Planning

Name	Description
Roles	Determine who has the demand manager [it_demand_manager] and demand user [it_demand_user] roles.
Portfolios	Determine how you want to group or categorize demands, and then have a user with the project manager [it_project_manager] role create portfolios based on those groupings.
Stakeholders	Identify individuals who have the appropriate domain knowledge to evaluate demands related to each portfolio. Then make them stakeholders for that portfolio.
Assessments	Consider using assessments to facilitate the information gathering process. Define metric categories and assessment metrics to develop and distribute assessments to the appropriate audience.
Bubble chart definitions	Identify metrics that are important to stakeholders, departments, and the organization. Use these metrics to create bubble charts that visually compare demands. For example, when considering which projects to undertake many organizations compare metrics such as risk rating, return on investment, and cost.
Resource assignments	Consider creating resource assignments to help the organization understand the time and resource costs associated with the demand. Any resource assignment attached to the demand propagate to the project. Resource assignments require that the Resource Management Workspace application is active.
Enhancement and defect requests	Determine if you need the ability to manage enhancement and defect requests as demands. This functionality requires that the Agile Development application is active.

Populate the stakeholder registry

Add users to the stakeholder registry so that demand and project management can automatically populate the stakeholder list when a user creates a demand or project.

Before you begin

Role required: it_pps_admin

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Procedure

1. Navigate to **All** > **Project Administration** > **Settings** > **Stakeholders**.
   You can also scroll to the **Stakeholders** related list on the Demand or Project form and click **New** to create a record.
2. Click **New** to create a new record.
3. On the stakeholder register form, fill in the fields.

   For a description of the field names, see Stakeholder Register Form.

> **Note:**
> When adding a user to the stakeholder registry, the combination of the user and the assigned portfolio must be unique. However, there can be more records for the same user but with different portfolio.

View an assessment metric category

View assessment metric categories that are used with assessment metric types and assessment metrics in generating the bubble charts on the Demand Workbench. The bubble charts help the demand managers to visually assess the demands.

Before you begin
Role required: it_pps_admin

About this task
The Demand Management application comes with an assessment metric type named **Demand**, five default assessment metric categories, and assessment metrics.

Procedure

1. Navigate to **All** > **Project Administration** > **Settings** > **Assessments Metric Categories**.
2. Open an assessment metric category to review it.
   The following default assessment metric categories are available with the Demand Management.

Demand assessment metric categories

Assessment metric category	Data source	Description
Size	**T-Shirt size** field on the Demand form.	Assesses demand size relative to the size of other demands.
Strategic Alignment	View an assessment category result field in the assessment category result for the Strategic Alignment metric category.	Assesses how closely the demand aligns with strategic goals of the organization compared to other demands.
Risk	**Rating** field in the assessment category result for the Risk metric category.	Assesses demand risks compared to other demands.

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Assessment metric category	Data source	Description
ROI	**Impact** and **Financial return** fields on the Demand form.	Assesses demand return on investment compared to other demands.
Cost	**Labor costs**, **Capital expense**, and **Operating expense** fields on the Demand form.	Assesses demand cost compared to other demands.

Configure a widget for the financial metrics of a demand

Configure a widget to view and track the financial metrics of a demand on the Demand Financials page.

Before you begin
Role required: pps_admin

Procedure

1. Navigate to **All** > **Project Administration** > **Widgets**.
2. Select **New**.
3. On the Widget form, fill in the fields.
   For a description of the field names, see Widget form.

What to do next
Associate the widget to the Demand table.

Associate a widget to the Demand table

After you configure a widget, associate it with the Demand table to show the financial data of a demand.

Before you begin
You need to configure a widget before you can associate it with the Demand [dmn_demand] table.

Role required: pps_admin

Procedure

1. Navigate to **All** > **Project Administration** > **Widgets**.
2. Open a widget to associate with the Demand table.
3. In the Widget associations related list, click **New**.
4. On the Widget Association form, fill in the fields.
   For a description of the field names, see Widget Association form.

Configure demand workbench

Update the demand workbench to configure parameters such as bubble chart.

Before you begin
Role required: it_pps_admin

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About this task

You can configure the parameters of the demand workbench provided with the base system. Bubble charts are useful for comparing demands based on common metrics such as risk rating, return on investment, and cost. Decision makers can use bubble charts when considering which demands to approve or reject.

Procedure

1. Navigate to **All** > **Project Administration** > **Settings** > **Workbench Config - Demand**.
2. Open the **Demand Workbench** record.
3. Update the required settings and click **Update**.

Use Demand Management

Users with the demand manager role can create, view, and modify demands using the Demand Management application.

You can also approve demands and create the following artifacts from the approved demands:

- Project
- Change
- Enhancement
- Defect

The type of artifact created from a demand depends on the selections in the **Category** and **Type** fields on the Demand form. Enhancements and defects can be created when the system administrator has activated the SDLC-SCRUM plugin.

Demand Management Life Cycle

The demand management life cycle can be simplified as follows:

- Creating a demand: The user submits an idea and the demand manager approves the idea, automatically creating a demand from that idea.
- Viewing a list of demands: The demand manager views demands on the demand workbench or from a list view.
- Enhancing a demand: The demand manager can send the demand to screening, which sends assessments to stakeholders.
- Assessing a demand:
  - The demand manager can screen the demand and send surveys to stakeholders to complete assessments.
  - The demand manager can set the state of the demand to qualify, defer, or incomplete.
  - Demands can be analyzed and approved using the demand workbench.
- Creating an artifact: The demand manager creates a project, enhancement, change, or defect.

The demand management application uses the following simplified demand states.

Demand States

State	Description
Draft	The demand manager accepts a submitted idea.

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Demand States (continued)

State	Description
	After reviewing or editing the record, click one of these buttons: • **Update**: The demand record is updated, but the demand remains in the current state. • **Submit demand**: The demand is moved to the submitted state. • **Delete**: The demand record is deleted.
Submitted	An accepted idea creates a demand record and the demand manager submits the demand. After reviewing or editing the record, click one of these buttons: • **Update**: The demand record is updated, but the demand remains in the current state. • **Screen**: The demand is moved to the screening state. • **Qualify** The demand is moved to the qualified state. • **Defer**: The demand is moved to the deferred state. • **Incomplete**: The demand is moved to the incomplete state. • **Delete**: The demand record is deleted.
Screening	The demand initiates assessments for the demand. After reviewing or editing the record, click one of these buttons: • **Update**: The demand record is updated, but the demand remains in the current state. • **Qualify** The demand is moved to the qualified state. • **Defer**: The demand is moved to the deferred state. • **Delete**: The demand record is deleted.
Qualified	The demand has been qualified and is ready for review. After reviewing the record, click one of these buttons: • **Update**: The demand record is updated, but the demand remains in the current state. • **Approve**: The demand is moved to the approved state. • **Defer**: The demand is moved to the deferred state. • **Delete**: The demand record is deleted.
Deferred	The demand has been put on hold. The demand can be revisited in future and reviewed. After reviewing the record, click one of these buttons: • **Update**: The demand record is updated, but the demand remains in the current state. • **Approve**: The demand is moved to the approved state.

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Demand States (continued)

State	Description
	• **Reset to Draft**: The demand is moved back to the draft state. • **Delete**: The demand record is deleted.
Approved	The demand is approved After reviewing or editing the record, click one of these buttons: • **Update**: The demand record is updated, but the demand remains in the current state. • **Close**: The demand is moved to the closed state. • **Delete**: The demand record is deleted.
Completed	The demand is moved to the completed state.

These states appear in the process flow indicator at the top of the Demand form. The process flow indicator:

- Highlights the current state of the demand.
- Checks off the states that a demand has passed through.
- Leaves blank the states that have been skipped.

In this example, the demand is in the **Approved** state. It passed through the **Draft**, **Submitted**, and **Qualified** states but skipped the **Screening** state.



Assess demands

The Demand Management application comes with two demand visualization tools that can aid decision makers with demand assessment.

The demand workbench provides a single point of engagement for assessing and approving demands and creating projects, enhancements, changes, or defects. This page combines multiple views of demand information, including an interactive bubble chart and a detail area that displays the list of current demands. The demand roadmap is a visual representation of demands over time for an organization.

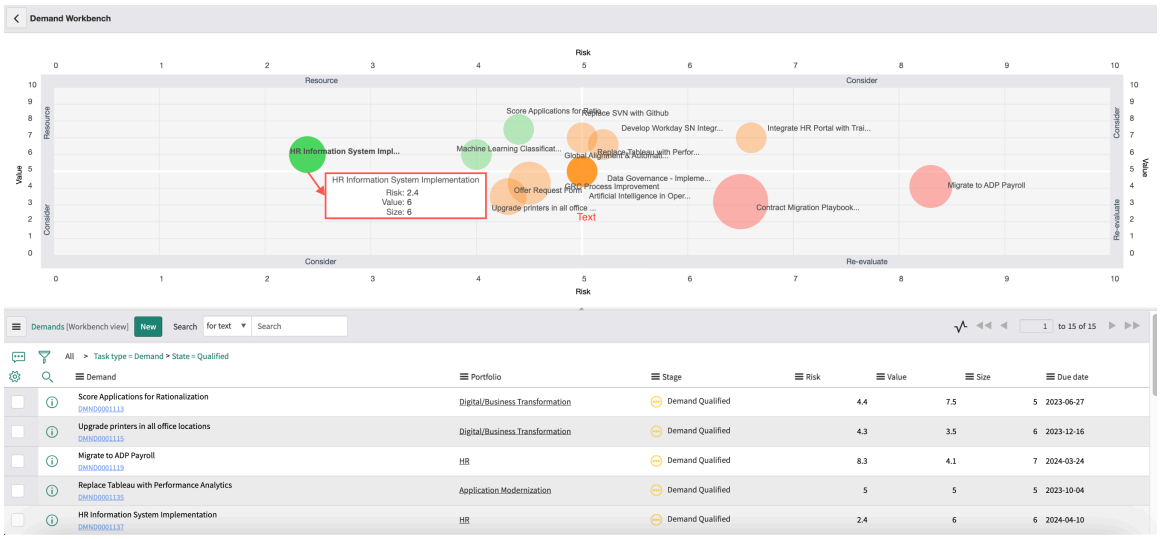
Using the Demand Workbench

A bubble chart is a graph that plots multiple demands based on three categories: risk, value, and size. Each demand is represented on the bubble chart by a circle, which varies in size and color depending on the average of the scores for these categories. The bubble chart in the demand workbench displays all qualified demands and is dynamically updated as demands are created and assessed. This chart makes a useful tool for demand managers, stakeholders, and decision makers to assess visually and compare demands.

The list view on the demand workbench displays a list of the qualified demands that appear in the bubble chart. Selecting a demand from this list highlights the demand in the bubble chart and displays the demand form. The list view is also integrated with Live Feed so users can see current activity for a demand.

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To access the demand workbench, navigate to **Demand** > **Demands** > **Workbench**.



Using the Roadmap

The roadmap is an interactive visualization tool that shows all demands that are currently in an active state. You can modify the look of the backlog using the Settings pane. The Settings pane enables you to change between the two-dimensional (2D) and three-dimensional (3D) view, filter demands by portfolio, or open the demands in a list view. While in list view, you can reassign panel colors, create filters to limit the records that are used for lanes and panels, and apply sorting. To use the roadmap, navigate to **All** > **Demand** > **Roadmap**.

Create a demand

Create demands to capture your strategic and operational requirements and centralize information for stakeholder assessment and prioritization.

Before you begin

Role required: snc_internal

Procedure

1. Access the Demand New record form in one of the following ways.
   - Navigate to **All** > **Demand** > **Demands** > **Create New**.
   - Navigate to **Self-Service** > **Demands** > **Create New**.
   - If you have the it_demand_manager role, navigate to **All** > **Demand** > **Demands** > **Workbench** > **New**.

     Note:
     Demands created from the Demand Workbench are in the Qualified state.

2. On the Demand New record form, fill in the fields.
   For a description of the field values, see Demand form.
3. Select **Save**.

   Note:
   Requesters or collaborators can edit their demand as long as the demand is in the Draft state.

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What to do next

- Review and refine the demand details.
- When all required information is complete, move the demand to the Submitted state by selecting **Submit demand**. The demand then enters the formal evaluation workflow involving the demand manager and stakeholders.

Create a new qualified demand

The demand manager can create a new qualified demand from the demand workbench list view.

Before you begin
Role required: it_demand_manager

About this task
Saving the demand adds it to the Demands list and adds a bubble representing the demand in the bubble chart.

Procedure

1. Navigate to **All** > **Demand** > **Demands** > **Workbench**.
2. Click **New** at the top of the list view.
3. Fill in the fields on the Demand form.
   For information about the fields, see Creating Demands.

Create a demand task

Create tasks for a demand to delegate cost, effort, risk, and benefit assessment activities. Assign a resource or group to the demand task to track the actual time and effort spent on performing the specified activities.

Before you begin
Role required: it_demand_manager

About this task
You create demand tasks to plan the work for demands rather than for the target work entity such as a project, change, defect, or enhancement. For more information, see Demand tasks.

- Planned dates, actual dates, and original dates are part of project tasks not demand tasks.
- The due date indicates the date on which the task is targeted for completion and does not affect the demand workflow. Project tasks, however, affect the project completion dates if the planned dates and actual dates are changed.
- Do not support creation of nested demand tasks.
- Do not support task constraints such as the settings Start ASAP and Start on specific date.
- Do not support an execution type such as Agile, Waterfall, or Hybrid.
- You assign resources for a demand task use the **Assigned to** field, **Additional Assignee** list, and **Assignment Group** fields.

Resources assigned to a demand task can submit the time spent on it using a time card.

If you are creating a demand task with the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin activated and Demand Currency view enabled, additional fields become available in addition to the Default view. For more information about the fields that are available only in the Demand Currency view, see Multicurrency in Demand Management and Multicurrency fields in demand-related forms.

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Procedure

1. Navigate to **All** > **Demand** > **Demands** > **All**.
2. Select the demand to which you want to add tasks.
3. Add or edit a demand task from the **Demand Tasks** related list:
   - To add a demand task, select **New**.
   - To update the details of an existing demand task, select the record and then select **Edit**.
4. On the Demand Task form, fill in the fields.
   For a description of the field names, see Demand task form.
5. Select **Save**.
   After completing your work on the demand task, select **Update** to return to the demand page.

What to do next

Create resource assignments and add cost plans, benefit plans, and risks to the demand depending on your role. Use the following related links to access these tasks.

Demand Task form related links

Related Links	Description
Add Cost Plan to Demand	Add a cost plan to capture the costs of demands. Create a cost plan to specify the unit cost of a cost type for a fiscal period. This link appears if the **Category** value is set to Cost estimate and the user has the `it_project_manager` or `it_demand_manager` role. Click the link to open the cost plan form and fill in the details. For more information, see create a cost plan.
Add Resource Plan to Demand	Create a resource plan to find the availability of resources and add the resource plan to the demand. This link appears if the **Category** value is set to Effort estimate and the user has the `it_resource_user` role. Click the link to navigate to the Resource Plans page and request resources. For more information, see Create and manage resource assignments for a demand.
Add Benefit Plan to Demand	Create a benefit plan to capture the potential benefits accrued by the demand when the demand is executed. This link appears if the **Category** value is set to Benefit estimate and the user has `it_project_manager` or `it_demand_manager` role. Click the link to open the benefit plan form and fill in the details. For more information, see Create a monetary benefit plan for a demand.
Add Risk to Demand	Add risks that can potentially impact the success or outcome of the execution of the demand. This link appears if the **Category** value is set to Risk estimate and the user has `it_project_manager` or

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Demand Task form related links (continued)

Related Links	Description
	`it_demand_manager` role. Click the link to open the risk form and fill in the details. For more information see, add a risk.

Submit a time card for a demand task

The resources assigned to a demand task create and submit a time card or time sheet to record the time spent on a demand task. The reported hours are used to calculate the actual cost and effort for a demand task.

Before you begin

Role required: timecard_user

About this task

The resource submits the time card or time sheet to record and track the work performed on a demand task. An appropriate approver then has to approve the submitted time card or time sheet.

Procedure

1. Navigate to **All** > **Time Sheets** > **Time Sheet Portal**.
2. Create a time card.
3. Fill in the hours for each day spent working on the demand task.
4. Click **Submit**.

Create an artifact from a demand

Create an artifact, such as a work item, from a demand so that you can track work on the demand.

Before you begin

A demand must have been created. For more information, see Create a demand.

The category and type of a demand and the applications you have installed determine the artifact you can create from it. The available artifact types and the applications you must have installed to be able to create them are listed in the following table.

Artifact	Required application
Enhancement, change, or defect	Project Portfolio Suite
Agile Development entities (story or epic)	Agile Development 2.0
Scaled Agile Framework (SAFe)SAFe entities (story, feature, or epic)	Essential SAFe or Portfolio SAFe

Role required: it_demand_manager

Note:
The safe_art_user role is required to create a SAFe story.

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Procedure

1. Navigate to **All** > **Demand** > **Demands** > **All**.
2. Open the demand for which you want to create an artifact.
3. Verify that the values in the **Category** and **Type** fields are appropriate for the artifact you want to create.
   The options in the Type list change according to the category that you select. For more information, see Demand form.

   Note:
   The **Category** and **Type** fields are set to read only when an artifact is created from a demand. If you delete the created artifact, these fields become editable again.

4. Select **Update**.
5. Create the artifact by selecting the appropriate related link.
   Depending on the category and type of the demand, links related to the artifact you can create become available.

Create a monetary benefit plan for a demand

Demand benefit plans capture the potential benefits accrued by the demand when the demand is executed. Create a monetary benefit plan to specify the estimated benefit in a category for a fiscal period.

Before you begin
Role required: it_demand_manager

About this task
The monetary benefit plan breakdown records are automatically created when you save the benefit plan. The monetary benefit plan breakdown records specify the estimated and actual benefits at a granular level for specific fiscal periods, such as FY16: April and FY16: May. The Monetary Benefit Plan Breakdowns related list shows the aggregated benefits for estimated and actual benefits for each fiscal period for the demand.

Note:
Converting a demand to a project transfers the benefit plan from the demand to the target project.

If you are creating benefit plan for a demand with the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin activated and Demand Currency view enabled, the fields in the **Financials** section differ from the Default view. For more information about the fields that are available only in the Demand Currency view, see Multicurrency fields in demand-related forms.

Procedure

1. Navigate to **All** > **Demand** > **Demands** > **All**.
2. Open the required demand form.
3. Click the Monetary Benefit Plans related list.
4. To create a monetary benefit plan, click **New**.

   Note:
   To create a monetary benefit plan from the **Financials Summary** page, click **Manage**.

5. On the Monetary Benefit Plan form, fill in the fields.

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For a description of the field names, see Monetary Benefit Plan form.

Note:
When you move the demand dates, the associated benefit plans also change accordingly based on whether the benefit plan is tied to the demand start date, or end date. The project property **Change Resource Plan, Cost Plan and Benefit Plan Start Date with Demand or Project Start Date Change** controls the behavior for demand date changes.

6. Click **Submit**.

What to do next
On the Benefit Plan form, view the benefit breakdown by fiscal period in the Monetary Benefit Plan Breakdowns related list.

Update a monetary benefit plan breakdown for a demand

Update a monetary benefit plan breakdown record that specifies the estimated and actual benefits, at a granular level, for specific fiscal periods.

Before you begin
Role required: it_demand_manager

Procedure
1. Navigate to **All** > **Demand** > **Demands** > **All**.
2. Open the required demand.
3. Click the Monetary Benefit Plans related list.
4. Open the required monetary benefit plan.
5. In the Monetary Benefit Plan Breakdowns related list, click the information icon (ⓘ) for a monetary benefit plan breakdown.
6. Click **Open Record**.
7. On the Monetary Benefit Plan Breakdown form, view and update the enabled fields.
   For a description of the field names, see Monetary Benefit Breakdown form.
8. Click **Update**.

Create a non-monetary benefit plan for a demand

Create a non-monetary benefit plan to specify the estimated benefit in a category for a fiscal period. Demand benefit plans capture the potential non-financial benefits accrued by the demand when the demand is executed.

Before you begin
Role required: it_demand_manager

About this task
The non-monetary benefit plan breakdown records are automatically created when you save the benefit plan by selecting **Automatic** or **Manual** in the **Breakdown Type** field. The non-monetary benefit plan breakdown records specify the estimated and actual non-financial benefits at a granular level for specific fiscal periods, such as FY16: April and FY16: May. The Non-monetary Benefit Plan Breakdowns related list shows the aggregated benefits for estimated and actual non-financial benefits for each fiscal period for the demand.

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Note:
Converting a demand to a project transfers the benefit plans from the demand to the target project.

Procedure

1. Navigate to **All** > **Demand** > **Demands** > **All**.
2. Open the required demand form.
3. Click the Non-Monetary Benefit Plans related list.
4. To create a non-monetary benefit plan, click **New**.
5. On the form, fill in the fields.

   For a description of the field names, see Non-monetary Benefit Plan form.

   Note:
   When you move the demand dates, the associated benefit plans also change accordingly based on whether the benefit plan is tied to the demand start date, or end date. The project property **Change Resource Plan, Cost Plan and Benefit Plan Start Date with Demand or Project Start Date Change** controls the behavior for demand date changes.

6. Click **Submit**.

What to do next

- On the Benefit Plan form, view the benefit breakdown by fiscal period in the Non-monetary Benefit Plan Breakdowns related list.
- Associate monetary and non-monetary benefit plans, so that you can capture the potential benefits (financial and non-financial) accrued by the demand for the hybrid benefit plans.

Update a non-monetary benefit plan breakdown for a demand

Update a non-monetary benefit plan breakdown record that specifies the estimated and actual benefits, at a granular level, for specific fiscal periods.

Before you begin

Role required: it_demand_manager

Procedure

1. Navigate to **All** > **Demand** > **Demands** > **All**.
2. Open the required demand.
3. Select the Non-monetary Benefit Plans related list.
4. Open the required non-monetary benefit plan.
5. In the Non-monetary Benefit Plan Breakdowns related list, select the information icon (ⓘ) against a non-monetary benefit plan breakdown.
6. Select **Open Record**.
7. On the Non-monetary Benefit Plan Breakdown form, view and update the enabled fields.
   For a detailed description of the field names, see Non-monetary Benefit Plan Breakdown form.
8. Select **Update**.

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Associate monetary and non-monetary benefit plans

Associate monetary and non-monetary benefit plans, so that you can capture the potential benefits (financial and non-financial) accrued by the demand.

Before you begin
Role required: it_demand_manager

About this task
You can associate a monetary benefit plan with a non-monetary benefit plan and vice versa.

Note:
When you delete a benefit plan, its relationship with the associated benefit plan (if any) is also removed.

Procedure
1. Navigate to **All** > **Demand** > **Demands** > **All**.
2. Open the required demand form.
3. Select the Monetary Benefit Plans or Non-monetary Benefit Plans related list.
4. Select the name of a benefit plan that you want to associate.
5. Associate a monetary or non-monetary benefit plan.
6. Select **Save**.

Result
The selected benefit plan is associated with another plan.

What to do next
Select the **View Associated benefit plan** related link to view the associated benefit plan.

Create a demand cost plan

Demand cost plans capture the costs of demands. Create a cost plan to specify the unit cost of a cost type for a fiscal period.

Before you begin
Role required: it_demand_manager

About this task
The application automatically creates cost plan breakdown records when you save the cost plan. The cost plan breakdowns are records that specify the estimated and actual costs and the budget at a granular level for specific fiscal periods, such as FY16: M04 and FY16: M05. The demand cost plans are added to the parent program and portfolio.

The cost plan breakdowns that specify the estimated cost and actual cost at a granular level for a fiscal period of the demand cost plan are recalculated in the project currency. Similarly, the estimated breakdown amounts of the planned benefit and actual benefit of the demand benefit plans are recalculated in the project currency. The project currency amounts are then rolled up to the cost plan, benefit plan, and the project records.

If you want to use multiple currencies, create a new cost plan for another currency.

If you are creating benefit plan for a demand with the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin activated and Demand Currency view enabled, the fields in

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the **Financials** section differ from the Default view. For more information about the fields that are available only in the Demand Currency view, see Multicurrency fields in demand-related forms.

Procedure

1. Navigate to **All** > **Demand** > **Demands** > **All** and open the required demand form.
2. In the related links, click **Cost Plans**.
3. To view the Financials Summary page in a grid, click **Manage**.
4. Add or edit a cost plan from the Cost Plans related list:
   - To add a cost plan, select **New**.
   - To update the details of an existing cost plan, select the record and then select **Manage**.
5. In the cost plan form, fill in the fields.

   For a description of the field names, see Cost plan form.

   Note:
   When you change the planned start date of a demand, the associated cost plans and resource assignments also change. The project property **Change Resource Plan and Cost Plan Start Date with Demand or Project Start Date Change** controls the behavior for demand date change.

6. Click **Submit**.

What to do next

- On the Demand form, view the breakdowns by fiscal period in the **Cost Breakdown** related list.
- To recalculate the value in the **Forecast** field, use the**Calculate Forecast Amount** related link.

View financial summary of cost and monetary benefit plans

View a breakdown of the cost and benefit components of a demand to track the financials of your demands. The financial summary enables you to assess the progress of the demand and track financial changes and their impact on the demand over a period.

Before you begin

Role required: it_demand_manager

About this task

View a detailed breakdown of the cost components of a demand using the **Financial Summary** tab. The total planned cost, budget cost, actual cost, and planned returns with their breakdowns are displayed in the form of read-only cards. The cost plans, benefit plans, and their breakdowns are provided in an editable grid view.

Procedure

1. Navigate to **All** > **Demand** > **Demands** > **All**.
2. Open a demand.
3. On the Demand form, select the **Cost Plans** or **Monetary Benefit Plans** related list.
4. Select **Manage**.
5. **Optional:** Add additional fields, view plan details, or reorganize the financial data.

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Create an expense line for a demand

A demand expense line is the cost associated with a specific source, such as a user or a fixed asset. Expense lines are part of demand cost plans.

Before you begin

Role required: it_demand_manager
Application required: Project Portfolio Management with Financials

About this task

Only processed expense lines are considered for demands. You can create multiple expense lines for a project or demand.

Expense lines on the demands are used to record any expense incurred during demand evaluation only. You can't associate expense lines to cost plans on demands. The actual cost incurred from the expense lines tied to the demand rolls up to the **Demand actual costs** field.

When a demand is converted to a project, the expense lines remain with the demand, while the cost plans and budget are moved over to the project.

Procedure

1. Navigate to **All** > **Demand** > **Demands** > **All** and open the demand form.
2. In the Expense Lines related list, select **New**.
3. On the expense line form, fill in the fields.
   For a description of the field names, see Expense line form.
4. Select **Submit**

Create and manage resource assignments for a demand

As a resource requester, find the availability of the resources, and create and manage the resource assignments for a demand.

Before you begin

Role required: it_demand_manager

Procedure

1. Navigate to **All** > **Demand** > **Demands** > **All**.
2. Open the required demand form.
3. Select the **Resource assignments** related list and select **New**.
4. On the Resource assignment new record form, fill in the fields.
   For a description of the field names, see New Resource Assignment form.
5. Select **Submit**.

Recalculate costs of resource assignments of a demand

Recalculate the costs of all active resource assignments of a demand whenever the hourly rates change in the associated rate model so that the plan costs are up to date.

Before you begin

Ensure the following setup:

- The demand must be active.
- The demand must have an active rate model assigned.

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Role required: demand_manager

About this task

This option recalculates the costs of all resource assignments of the demand at once. You can also open a resource assignment from the **Resource assignments** related list to recalculate the resource costs of an individual resource assignment.

Procedure

1. Navigate to **All** > **Demand** > **Demands** > **All**.
2. Open a demand.
3. On the Demand form, right-click on the header bar and select the **Recalculate Resource Costs**.
4. In the Recalculate Resource Cost form, fill in the fields.
   For a description of the field names, see Recalculate resource costs form.
5. Click **OK**.

Result

- Recalculates the selected resource costs of all the applicable resource assignments in the demand based on the latest hourly rates. The hourly rates are derived from the rate model associated with the demand.
- Updates the recalculated resource costs on the respective cost fields on the resource assignment form and the Resource assignments related list.
- Reflects the revised values in the respective cost fields of the demand.

Generate labor costs

Generate labor costs to view the expenses of resources using resource assignments and cost plans.

Before you begin

Role required: it_demand_manager

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Open the **Generate labor costs for demands and projects** scheduled job.
3. Select **Active** and on the Scheduled Script Execution form, fill the fields.
   For a description of the field names, see Scheduled Script Execution Form.
4. Select **Update**.

> **Tip:**
> Alternatively, as an admin, you can activate and define a scheduled job to generate labor costs at required frequency. For more information on how to activate a scheduled job, see Activate a scheduled job to generate labor costs.

Migrate budget of active demands to Next Experience

Migrate your demand budget to Next Experience to manage the financials using Project Workspace.

Before you begin

Role required: it_demand_manager

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Procedure

1. Navigate to **All** > **Demand** > **Demands** > **All**.
2. Migrate baselines using one of the following options.

> **Note:**
> After migration, you won't be able to view the budget on Classic UI. You're encouraged to manage budget using the Financials in Next Experience.

Migrate financial baselines of demands to Next Experience

Migrate the financial baselines of demands to Next Experience to manage the financial using Project Workspace.

About this task

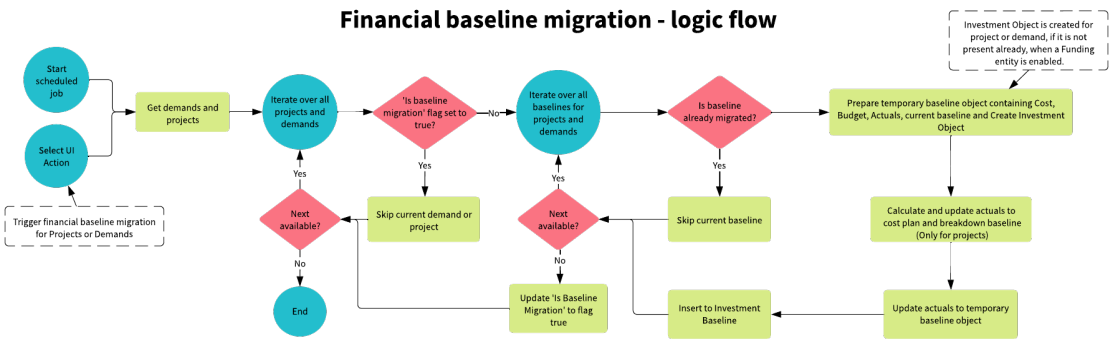
Next Experience uses new data model which has two new tables Investment Baselines (sn_invst_pln_invst_investment_baseline) and Investment Baseline Header (sn_invst_pln_invst_investment_baseline_header) which are used to capture financial baselines. The financial baselines created for demands in classic experience are not visible in Next Experience. You can migrate the existing baselines from classic to Next Experience as an on-demand activity for the required demands, or as bulk by activating and running a scheduled job.

Baselines view in the Next Experience provides better insights to view and analyze the financial performance of your demands.

Unlike the financial baselines created using Next Experience, the financial baselines created in the Classic UI do not capture the actual expenses along with planned costs as a default behavior. To have relevant information for baselines comparison, the actual costs will be captured as part of the baseline migration using the processed expense lines as of the baseline creation date of the financial baseline.

For detailed information and use cases on using financials in Next Experience, see Managing financials for planning items in Portfolio Planning.

> **Note:**
> Migration of financial baselines is not applicable for demands or projects with multi-currency.



Before you begin

- Create a financial baseline for a demand
- Role required: it_demand_manager

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Procedure

1. Navigate to **All** > **Demand** > **Demands** > **All**.
2. Migrate baselines using one of the following options.

> **Tip:**
> After migration, you're encouraged to create financial baselines using the Financials in Next Experience.

Result

Financial baselines for the selected demands will be migrated to Next Experience and you can view them in the Baselines view.

What to do next

View and compare the migrated baselines with any existing baselines or current baseline ( ).

Allocate budget to a demand

Set the budget of a demand according to the fiscal years.

Before you begin

Role required: it_portfolio_manager

Procedure

1. Navigate to **All** > **Demand** > **Demands** > **All** and open the demand form.
2. In the related links, click **Demand Budget**.
   The **Demand Budget** dialog box opens.
3. Select the fiscal year for which you want to set the budget for the demand.

> **Tip:**
> You can work on allocating lean budget at fiscal period level using the Investment Budget. For more information, see Enable lean budgeting for demands.

4. Enter the amounts for **Capex Budget** and **Opex Budget**.
   The **Total Budget** is updated with the sum of capex and opex amounts.

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5. Click **OK**.

Note:

- If the demand does not have a cost plan, start date, and due date, then demand budget is distributed from current month until the end of demand budget fiscal year.
- If the demand does not have a cost plan and a due date but has a start date, then demand budget is distributed from either:
  - Start date (if start date falls in the given budget fiscal year) until the end of the demand budget fiscal year.
  - Start of the demand budget fiscal year until the end of the demand budget fiscal year.
- If the demand does not have a cost plan and a start date but has a due date, then demand budget is distributed from either:
  - Current month until due date (if due date falls in the given budget fiscal year).
  - Current month until the end of demand budget fiscal year.

If the demand has a cost plan associated, then demand budget is distributed by honoring the cost plan fiscal periods.

Result

The demand budget for the selected year appears in the **Demand Budget** related list. You can click the amounts in the list to revise them.

Enable lean budgeting for demands

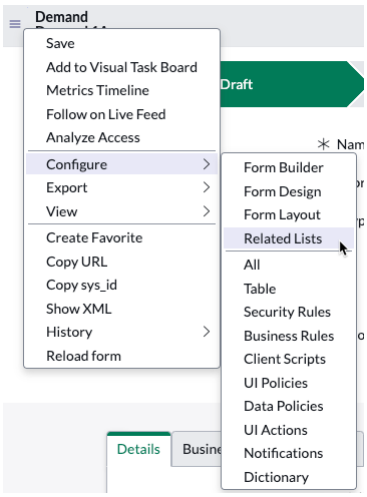
Enable the Investment Budget option to allocate budgeting for demands at fiscal period.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Demands** > **Demand** > **All**.
2. Open the required demand.
3. Select the Additional actions and navigate to **Configure** > **Related Lists**.



4. Select **Investment Budget** from the Available column and add it to Selected column.
5. Select **Save**.

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Manage lean budgeting for demand

Allocate budget for demands at each fiscal period instead of the entire fiscal year to reduce the overhead costs associated with traditional approach.

Before you begin

- Enable lean budgeting for demands
- Role required: sn_invst_pln.sn_spm_funding_user

  Any user role with this specific role attached can add or manage the investment budgets.

Procedure

1. Navigate to **All** > **Demands** > **Demand** > **All**.
2. Open the required demand.
3. In the Investment Budget related list, select **New**.
4. On the Investment Budget form, fill in the fields.
   For more information about the fields and their description, see Investment Budget form.
5. Select **Submit**.

Result

The allocated budget for a fiscal period is displayed in the Investment Budget related list.

Create baseline of a demand

Create financial baseline of a demand, which captures benefit and financial metric information (snapshot of cost plan, benefit plan, and demand-level financial metrics) at a particular moment in time.

Before you begin

Role required: it_demand_manager
You can create as many financial baselines as necessary and review the financials changes that have been made to the demand since the previous baseline. Any financial baseline does not capture the actual cost component of the demand.

Procedure

1. Navigate to **All** > **Demand** > **Demands** > **All**.
2. Select the required demand.
3. To create a financial baseline of a demand, use either of the options.

Compare financial baselines of a demand

You can compare baselines to review the variances in the financial data of a demand and see what changed.

Before you begin

Role required: it_demand_manager

About this task

You can create multiple baselines at various stages of a demand's life cycle, for example, at the end of each phase or after every calendar month or quarter. Each baseline captures the financial data of the demand at a particular moment, providing a basis from which you can identify and review the changes made to the demand. Having multiple baselines and comparing them helps you track the performance of your demand.

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If you are creating demand with the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin activated and Demand Currency view enabled, you can view and compare the financial details of the demand in baselines in the demand currency. For more information about the fields that are available only in the Demand Currency view, see Multicurrency in Demand Management.

Procedure

1. To compare financial baselines of a demand, perform one of the following options.

2. On the Financial Baseline form, select the baselines you want to compare from the two choice lists.
   By default, the current and the most recent baselines are selected.
3. Click **Compare**.
   The comparative data of the baselines display in the following two sections:
   - The **Financial Baseline Summary** section displays three widgets: the first two widgets contain the financial data of the two baselines, and the third widget contains their variance.
   - The **Financial Baseline Details** section displays the cost plans and benefit plans of the two baselines in two different grids. Each plan type has two rows corresponding to each baseline data.

     Note:
     To see the color code of rows representing each baseline, click the baseline legend icon ( ).
4. **Optional:** Add additional fields or reorganize the comparative data on the **Financial Baseline Summary** section of the form.
   - To toggle viewing the **Financial Baseline Summary** section, click the **Collapse** icon ( ) or **Expand** icon ( ).
   - To show or hide additional fields on the widgets in the **Financial Baseline Summary** section, click the configuration icon ( ) and select the field names.

     Note:
     If the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin is activated, you can add additional fields to the baseline such as Total planned cost in demand currency, Operating budget in demand currency, and Financial return in demand currency.

     (Optional) The selected field preferences are saved and are available when you reopen the Financial Baseline form.

   - To reset to the default widget layout, click **Reset to defaults**.
   - To view the financial information of the baselines in demand currency, toggle the **Show Widgets in Demand Currency** button.

     Note:
     This button is available only when the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin is activated.
5. **Optional:** View details of financial data of the cost and benefit plans on the **Financial Baseline Details** section of the form.

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- To view a cost plan or benefit plan comparative data in yearly, quarterly, or monthly format, click the **Year** or **Quarter** or **Month** views respectively.
- To view details of a fiscal year, click the **Expand** icon ( ) or **Collapse** icon ( ).

View demands

You can view existing demands at any time.

Before you begin

Role required: it_demand_manager

About this task

The **Project** field displays the project name after the demand manager creates a project from the demand. The **Risk**, **Value**, and **Size** fields display assessment metrics for the demand. This information appears on the Demands list.

Note:
Users cannot search or sort the **Stage** column on the Demands list.

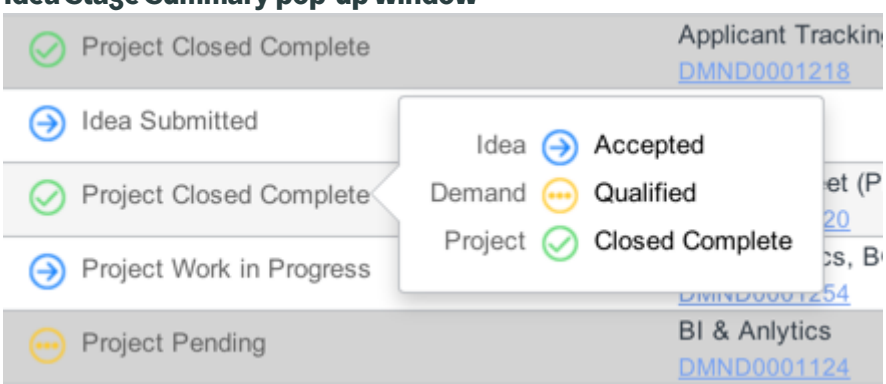
Procedure

1. View demands using one of the following options.
   a. **All** > **Demand** > **Workbench** The bubble chart and the list view on the demand workbench display all qualified demands.
   b. **All** > **Demand** > **Demands** > **All**Displays the Demands list.
   c. The demand user can view demands by navigating to **All** > **Demand** > **Demands** > **All**.
2. Click the **Number** field on the Demands list to view the Demand form.
3. View the status fo the demand using the **Stage** field.

   This field is updated as the demand moves through the life cycle, from an idea to a demand to the resulting project, enhancement, change, or defect. At a glance, users can use this field to track the progress of a demand.

4. Point to the **Stage** field on the Demands list to view the progression of the idea along with the value of the **State** field for each step in the progression:
   - **Idea**: If an idea is being evaluated, the pop-up window displays the current state of the idea.
   - **Demand**: if an idea is promoted to a demand, the pop-up window displays the current state of the demand as well as the idea.
   - **Project**, **Enhancement**, **Change**, or **Defect**: if a demand is accepted, the pop-up window displays the current state of the resulting artifact in addition to the demand and idea.

Idea Stage Summary pop-up window



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View an artifact created from a demand

As the demand manager, you can view an artifact created from a demand.

Before you begin

Role required: it_demand_manager

Procedure

1. Navigate to Navigate to **All** > **Demand** > **Demands** > **Workbench**.
2. Right-click a bubble that has an associated artifact.
3. Click **View <artifact>**.
   This action displays the artifact form for the selected demand in a new tab.

View a demand summary

Point to a bubble in the demand workbench bubble chart to display a summary of the demand information.

Before you begin

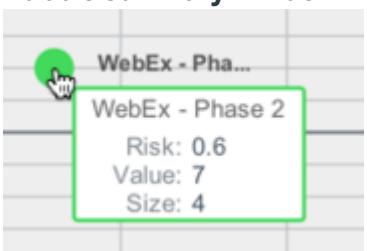
Role required: it_demand_manager

Procedure

1. Point to a demand in the bubble chart to highlight the bubble and its label.

   A bubble summary window also shows the demand name and the risk, value, and size data. Pointing to the bubble also highlights the corresponding demand row in the list view. Pointing to a demand in the list view highlights the corresponding bubble in the bubble chart.

   Bubble Summary Window

   Note:
   When pointing to a bubble, scroll down in the list view to see the corresponding highlighted demand row. If necessary, adjust the height of the list view or the bubble chart.

2. For multiple demands, some bubbles or labels overlap and are difficult to see.

   Point to a label to highlight the corresponding bubble.

   Use when:

   - Two or more bubbles have the same metrics and overlap directly.
   - Several bubbles intersect and overlap.
   - A bubble is only partially visible on the edge of the bubble chart.

Add details to demands

The demand manager typically works with a business relationship manager to identify stakeholders and elicit requirements, risks, and other important information.

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The Demand Management application streamlines the stakeholder identification process. Auto-populating the list of stakeholders from the portfolio the user selects when filling out the demand form in the service catalog or in the Demand Management application. The Demand Management application also enables you to use assessments to automate some of the information gathering process.

Add demand tasks

Demand managers analyze business demands, approve demands, and create projects and enhancements. Many times activities such as effort, cost, risk, and benefit estimates are required to analyze a demand and create a business case for approval of the demand. A demand manager can create demand tasks and assign these tasks to individual resources or a group to perform these activities.

The resources assigned to the demand tasks then post time spent while working on a demand or demand task using a time card. The time card data is used to calculate actual effort and cost incurred on the demand task as well as demand.

To create demand tasks, scroll to the **Demand Tasks** related list on the Demand form and select **New** to create a record.

Add stakeholders

When a demand is submitted, the demand stakeholder list is populated automatically from the associated portfolio. You can also add stakeholders. To add a person to the stakeholder list, scroll to the *Stakeholders* related list on the Demand form, select **Create new** to create a record, and fill in the form. To add existing stakeholders to the demand, select **Add existing**.

When adding a stakeholder from the demand form, the **Portfolio** field displays the portfolio that was selected on the Demand form.

A demand can have multiple stakeholders and a stakeholder can be associated with multiple demands.

The newly added stakeholder is automatically associated with the current demand and any other demands that use the same portfolio.

Add requirements

Demand managers can create as many requirements as needed, but requirements aren't required. Typically, the stakeholders associated with a demand request have insights into what the requirements are for a demand request to be completed.

Demand managers use the Requirement form to describe the requirement and assign an owner who is responsible for making sure that the requirement is met. When a requirement is complex, demand managers can associate planned tasks, such as project tasks, with the requirement. The demand manager assigns and tracks the tasks until they're complete.

To add a requirement to a demand, follow these steps:

1. Open a Demand form and select **New** from the Requirements related list.
2. On the Requirement form, fill in the fields. For a description of the field names, see Requirement form.

Add resource assignments

Resource assignments are another source of information that decision makers can use when evaluating demands. You can create resource assignments for a demand from the

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Resource assignments related list, which appears only if the Resource Management Workspace application is activated.

To add a resource assignment to the demand, scroll to the *Resource assignments* related list on the Demand form and select **New** to create a record.

Add and recalculate strategy and goal allocations

The Strategy Allocations related list displays the percentage of the demand's total cost and benefits allocated toward the achievement of the associated strategies. The Goal Allocations related list displays the percentage of demand's total cost and benefits allocated toward achievement of goals associated with the demand. For more information, see Allocate or modify the strategy and goal percentage for a demand.

Recalculate and update cost field values in the Strategy and Goal Allocation tabs. Use the Recalculate Strategy and Goal Allocation related link to update the demand's total cost and benefits when strategy and goal allocations for the demand are changed. For more information, see Strategic Spend Tracking for PPM.

Note:
These related lists and related links appears only when Strategic Spend Tracking for PPM is installed. This application is available on ServiceNow Store. You must switch to the **Strategic Alignment** view to see them. If these lists and links aren't available on the form view that you're using, ask your administrator to configure the demand form to add them. For more information, see Install Strategic Spend Tracking for PPM.

Add goal/target relationships

The Goal/Target Relationships related list displays the relationship between a goal and a planning item, strategic item, or any other item such as a demand.

Allocate funds

If your demand represents a significant, multi-year investment and you must distribute funding across related work, you can allocate funds from your demand. By allocating funds, you can directly support one or more projects, epics, or programs linked to the approved demand.

This link appears only if you have the Investment Funding plugin activated, an existing corresponding investment record for this demand, and the investment_user role.

RIDAC (Risk, Issue, Decision, Action, and Request Changes) record entries for a demand

RIDAC is an acronym for Risk, Issue, Decision, Action, and Request Changes records. Create a risk record for your demand that you can convert to other records during the demand life cycle to track issues and to avoid having to manually copy relevant details in related records.

As a demand progresses through the demand life cycle, a risk might result in an issue or a new issue might occur. Once you have a risk record, you convert that record into related records such as issues, actions, or decisions. This conversion and association of records helps you analyze and identify patterns, trends, and probable resolution for planning future demands. The ability to convert records provides you with the following advantages:

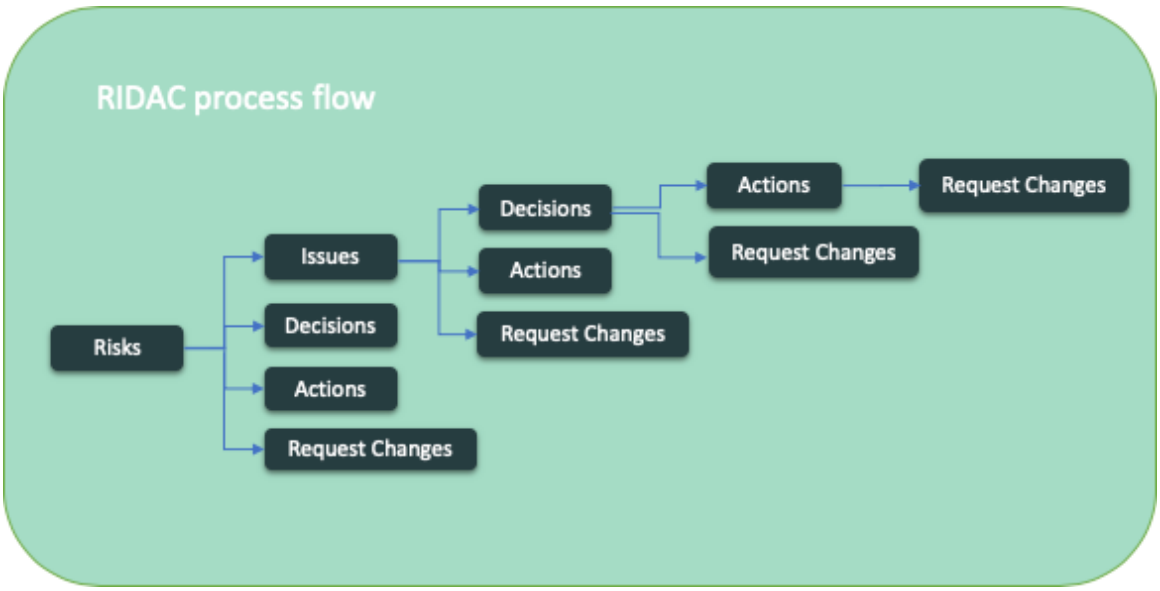
- Ability to create related records without having to repeatedly manually enter the relevant information.
- Helps you analyze and identify patterns, trends, and probable resolution for planning future demands.
- Enables you to view a consolidated list of all converted RIDAC records using the **View RIDAC** related link on the Demand form.

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Consider the following points before converting or associating RIDAC records:

- You can convert one record to another only in the RIDAC sequence. For example, you can convert a risk to an issue, decision, action, or request change but you cannot convert an issue to a risk or a decision to an issue. The following diagram illustrates the RIDAC process flow.

RIDAC flow



- You can convert one record into multiple RIDAC records. For example, you can create multiple issue records from one risk record.
- You can associate one record with multiple different records. For example, you can link one issue record to multiple different risk, decision, action, or request change records. For more information, see Associate existing RIDAC (risks, issues, actions, decisions, and request changes) records for a demand.

Add risks for a demand

Add a risk to a demand to identify, analyze, prioritize, plan, and track a risk during any phase of the demand life cycle. Assess potential problems and the severity of their impact to take informed decisions about the demand.

Before you begin

Role required: it_demand_manager

About this task

A risk is any uncertain event that can potentially impact the success or outcome of a demand. For example, an incorrect estimate of factors like financial outlay or resource assignments can cause schedule slippage. Another example of a risk is a change in demand requirements. Recording risks ensures that decision makers have all relevant information when assessing a demand's progress. The demand risks are added to the parent program and portfolio.

Procedure

1. Navigate to **All** > **Demand** > **Demands** > **All**.
2. Select the demand to which you want to add risks.
3. From the Risks related list, select **New**.
4. On the Risk form, fill in the fields.

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For a description of the field names, see Risk form.

5. Select **Submit**.

What to do next

- Convert an existing risk to an issue, decision, action, or request change and close the risk. For more information, see Convert one RIDAC (Risk, Issue, Decision, Action, and Request Change) record to another for a demand.
- Associate the risk with existing issues so you can track dependencies and recognize trends for the future. For more information, see Associate existing RIDAC (risks, issues, actions, decisions, and request changes) records for a demand.

Configure custom Risk rank and Risk value for a demand

Configure custom risk rank and value scores (such as High-Medium, Medium-Low, or Absolute-Low) to rate the impact and probability factors for a risk.

Before you begin

Role required: pps_admin

About this task

Use the Risk Value Lookup module to set up the risk rank and risk value for a specific combination of risk impact and probability. The system uses these values to determine the degree of risk (Absolute, High, Medium, Low) based on the impact and probability factors of a risk.

The value in the **Probability** field is multiplied by the value of the **Impact** field to generate the values for the **Risk rank** and corresponding **Risk value** in the Risk form.

By default, you can use the following impact, value, and probability scores for a risk to create a risk rank and risk value score:

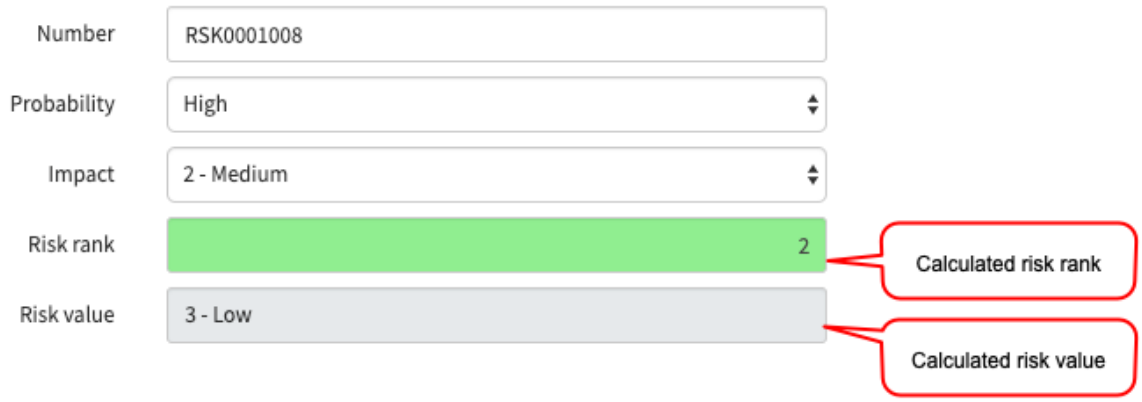
- Absolute
- Low
- Medium or Moderate
- High

For example, a risk might have high probability and medium impact but you might want to consider it as an overall low risk for the demand. In that case, you would configure the Risk Value Matcher form with the following values:

- Impact = 2 Medium
- Risk Rank Color = Green
- Probability = High
- Probability Number = 1
- Risk Value = 3 Low

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The following image illustrates the results of this example on the Risk



form.

Procedure

1. Navigate to **All** > **Project Administration** > **Settings** > **Risk Value Lookup**.
2. Click **New**.
3. On the risk value matcher form, fill in the fields.
   For a description of the field names, see Risk value matcher form.
4. Click **Submit**.

Add issues for a demand

Add an issue to a demand to escalate a risk or to track an unexpected problem such as a technical malfunction or resource unavailability that occurs during any phase of the demand life cycle. If the issue remains unresolved, unnecessary conflicts, delays, or even a failure can occur.

Before you begin

Role required: it_demand_manager

Procedure

1. Navigate to **All** > **Demand** > **Demands** > **All**.
2. Select the demand to which you want to add an issue.
3. From the Issues related list, click **New**.
4. On the Issue form, fill in the fields.
   For a description of the field names, see Issue form.
5. **Optional:** Search in the knowledge base for any article related to the issue.

   a. Click the search knowledge icon ( ).

   b. If you find relevant articles, click the title of an article to view its content.

   c. If you want to include the content of the article in the issue, click **Attach to Issue**.
   The article content is copied in to the **Description** field of the Issue form. You can modify the text if necessary.

6. Click **Submit**.

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What to do next

- Convert an existing issue to decision, action, or request change and close the issue. For more information, see Convert one RIDAC (Risk, Issue, Decision, Action, and Request Change) record to another for a demand.
- Associate the issue with your existing risks so you can track dependencies and recognize trends for future. For more information, see Associate existing RIDAC (risks, issues, actions, decisions, and request changes) records for a demand.

Add decisions for a demand

As a demand manager, develop a plan to manage risks and issues proactively with solutions. Add the solution for a risk or issue to a demand in the form of a decision. You can also convert a risk or an issue to a decision or a decision to an action or a request change.

Before you begin

Role required: it_demand_manager

Procedure

1. Navigate to **All** > **Demand** > **Demands** > **All**.
2. Select the demand to which you want to add a decision.
3. From the Decisions related list, click **New**.
4. On the Decision form, fill in the fields.
   For a description of the field names, see Decision form.
5. **Optional:** Search in the knowledge base for any article related to the decision.

   a. Click the search knowledge icon ( ).

   b. If you find relevant articles, click the title of an article to view its content.

   c. If you want to include the content of the article in the issue, click **Attach to Decision**.
   The article content is copied in to the **Description** field of the Decision form. You can modify the text if necessary.

6. Click **Submit**.

What to do next

- Convert a decision to an action or request change and close the decision. For more information, see Convert one RIDAC (Risk, Issue, Decision, Action, and Request Change) record to another for a demand.
- Associate the decision with your existing issues and risks so you can track dependencies and recognize trends for future. For more information, see Associate existing RIDAC (risks, issues, actions, decisions, and request changes) records for a demand.

Add actions for a demand

Add actions that are required for resolving an issue or risk for a demand. You can also convert a risk, issue, or decision to an action based on your analysis and plan for resolution of a risk or issue.

Before you begin

Role required: it_demand_manager

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About this task
After analyzing the risks and issues and taking a decision on how to manage those risks and issues, add an action for resolving the risk or issue to a demand.

Procedure
1. Navigate to **All** > **Demand** > **Demands** > **All**.
2. Select the demand to which you want to add an action.
3. From the Actions related list, click **New**.
4. On the Action form, fill in the fields.
   For a description of the field names, see Action form.
5. **Optional:** If the action requires approval from other stakeholders, request approval with a due date using the **Approval** and **Due date** fields.
6. Click **Submit**.

What to do next
- Convert an action to a request change and close the action. For more information, see Convert one RIDAC (Risk, Issue, Decision, Action, and Request Change) record to another for a demand.
- Associate the action with your existing risk, issue, and decision records so you can track dependencies and recognize trends for future. For more information, see Associate existing RIDAC (risks, issues, actions, decisions, and request changes) records for a demand.

Add Request Changes to a demand

As a demand manager, you might create a request change as the outcome of the action taken to resolve an issue or mitigate a risk. The request change might result in changing the demand's scope, resource requirement, cost, or schedule to minimize the impact of a risk or issue.

Before you begin
Role required: it_demand_manager

Procedure
1. Navigate to **All** > **Demand** > **Demands** > **All**.
2. Select the demand to which you want to add a request change.
3. From the Request Changes related list, click **New**.
4. On the Request Change form, fill in the fields.
   For a description of the field names, see Request change form.
5. Click **Submit**.

What to do next
Associate the request change with your existing risk, issue, decision, and action records so you can track dependencies and recognize trends for future. For more information, see Associate existing RIDAC (risks, issues, actions, decisions, and request changes) records for a demand.

Convert one RIDAC (Risk, Issue, Decision, Action, and Request Change) record to another for a demand

Convert one RIDAC record (risk, issue, action, decision, and request changes) to another, in that order, to retain the record information instead of having to create a new record manually and to more easily track the issue.

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Before you begin
Role required: it_demand_manager

About this task
When you convert a RIDAC record to another record, the values for the **Short description**, **Requester**, and **Assigned to** fields are carried forward.

You can also specify to close the parent record on creation of the new record instead of manually closing the parent record.

You can also view the consolidated list of all the converted RIDAC records using the **View RIDAC** related link on the Demand form and **View RIDAC** in the application navigator of the Demand module.

Procedure
1. Navigate to **All** > **Demand** > **Demands** > **All**.
2. Select the demand for which you want to convert a risk, issue, decision, action, or request change record to another RIDAC record.
3. From the Demand form related list, select the risk, issue, decision, action, or request change record to open the form view.
4. Click the **Convert to RIDAC** related link on the form.
5. **Optional:** On the Convert dialog box, from the Select task type list, select the RIDAC record to which you want to convert the selected record.
   For example, if you wanted to convert a risk to an issue, you would select **Issue**.
6. **Optional:** Modify the text in the **Short description** field, which is copied from the parent record.
7. **Optional:** Change the default assignment copied from the parent record in the **Assigned to** field by clicking the lookup icon ( ) and selecting a different user.
8. **Optional:** If you want to close the parent RIDAC record on creation of the new record, select the close parent record option.
   The label of the close parent record option changes depending on the parent record type.
   For example, if the parent record is Risk and you are converting it to an issue record, the close record option would appear as **Close Risk**.
9. Click **OK**.

Associate existing RIDAC (risks, issues, actions, decisions, and request changes) records for a demand

Link existing RIDAC records (risks, issues, actions, decisions, and request changes) to one another for your demand. Associating RIDAC records with each other enables you to keep a record of risks or issues and their outcome for analysis at demand closure and planning. It also helps to track the risks and issues throughout the demand life cycle.

Before you begin
Role required: it_demand_manager

About this task
You can associate one record with multiple different records. For example, you can link one issue record to multiple risk, decision, action, or request change records. Additionally, you can view the converted RIDAC records such as risks converted to issues, decisions, actions, and changes, using the View RIDAC related link.

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Procedure

1. Navigate to **All** > **Demand** > **Demands** > **All**.
2. Select the demand for which you want to associate one RIDAC entry to another.
3. In the Demand form related list, select the RIDAC record.
4. On the form, select the **Associate RIDAC** related link.
5. In the Associate dialog box, from the Select type list, select the RIDAC record to which you want to associate the selected record.
   For example, if you wanted to associate a risk to an issue, you would select **Issue**.
6. Select the record number to which you want to associate the selected record from the Associate to list.
   For example, if you wanted to associate the selected risk to issue (ISU0010003), you would select **ISU0010003**.
7. Select **OK**.

Reset a demand to Draft state

A demand can be moved back to Draft state, if required.

Before you begin

Role required: it_demand_manager

About this task

A demand can be reset to Draft from the Completed, Approved, Screening, or Submitted states, or until an artifact such as a project, enhancement, defect, or change is created from it. The **Reset to Draft** option is unavailable if the demand is in the Qualified state.

Procedure

1. Navigate to **All** > **Demand** > **Demands** > **All**.
2. Open the required demand form.
3. Click **Reset to Draft**.
   A confirmation message appears if there are:
   - Active assessments pending with stakeholders, or
   - Resource assignments are created for the demand
4. Select the check box to re-plan the allocated resource plans that have no actual hours reported.
5. Click **OK**.

Result

- The demand is moved to Draft state.
- All the score values in **Assessment Data** tab are reset to default.
- All active assessments for the demand are canceled. New assessments are triggered when the demand moves to the Screening state and if the **Assessment Required** field on the demand form is set to true.

Delete demands

Demands can be deleted only while in the *Pending* state.

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Before you begin
Role required: it_demand_manager or it_demand_user

About this task
When you delete a demand, all data related to the demand, such as risks, demand tasks, requirements, and decisions are deleted, but the stakeholders are not deleted from the Stakeholder Register [dmn_stakeholders_register] table.

If a project is already created from a demand, its reference is removed from the project along with the data related to the demand, however, the project is not deleted from the database.

To delete a demand:

Procedure
1. Navigate to **All** > **Demand** > **Demands** > **All**.
2. Do:
   - Click the demand to open the demand form and then click **Delete**.
   - Select the check box next to the demand and then select **Delete** from the **Actions** choice list.

Move and resize a demand

As the demand manager, you can move and resize bubbles in the bubble chart.

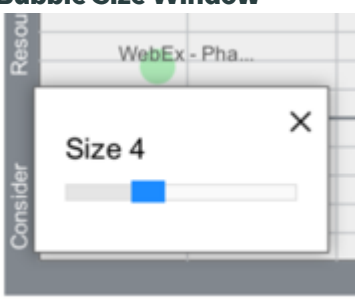
Before you begin
Role required: it_demand_manager

About this task
Moving and resizing bubbles in the bubble chart updates the corresponding values for the demands in the list view.

Procedure
1. Click and drag a bubble left or right along the horizontal axis to decrease or increase the risk of the demand.
   The new risk for the demand is updated in the **Risk** column.
2. Click and drag a bubble up or down along the vertical or Y axis to increase or decrease the value of the demand.
   The new value for the demand is updated in the **Value** column.
3. Click a bubble to open a sizing window where you can increase or decrease the size of the bubble.

   The new size of the demand is updated in the **Size** column.

Bubble Size Window



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Train the similarity solution for Demand Management to find similar demands

Train the Similar Demands solution definition included within the Predictive Intelligence for PPM capability to find related demands when creating a demand.

Before you begin

Ensure that the Predictive Intelligence for Contextual Search plugin (com.snc.contextual_search_ml), PPM Standard plugin (com.snc.financial_planning_pmo), and Predictive Intelligence for PPM plugin (com.snc.ppm_ml) are activated. For more information about Predictive Intelligence, see Predictive Intelligence.

Role required: admin

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Similarity** > **Solution Definitions**.
2. In the Similarity Definitions list, search for and select the Similar Demands solution definition (ml_sn_global_global_similar_demands).
3. On the Similarity Definition form, verify the default field values for demands.
   For more information about the Similarity Definition form fields, see Create and train a similarity solution.
4. Click **Update & Retrain**.
5. Open the Similarity Definition form for the Similar Demands solution definition (ml_sn_global_global_similar_demands).
6. In the ML Solutions related list, view the training solution progress in the **Progress** column.

> **Note:**
> Alternatively, you can click the link for the solution in the **Active** column. On the ML Solution form, click the **Show training progress** related link to check the training solution progress.

Result

When the solution is complete, the similar demands appear in the Similar demands section on the Demand form.

What to do next

- Review similarity examples: On the Similarity Definition form, in the ML Solutions related list, when **Progress** is 100%, in the **Active** column, click the link for the solution. On the ML Solution form, click the **Similarity Examples** related link to view the Similarity Examples list.
- Update the similarity score threshold: On the ML Solution form, on the **Solution Statistics** tab, enter the required value in the **Similarity Score Threshold** field. Right-click the ML Solution form and click **Save**.
- Test the prediction output for the records: On the ML Solution form, on the **Test solution** tab, enter your text in the **Short description** field and the maximum number of expected results in the **Top N** field, and then click **Run test**. The results above the similarity score threshold value are displayed.

Related topics

Predictive Intelligence

Predictive Intelligence for Demand Management

Create a demand

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PPM PIWB template - Find similar demands

Use a guided template that walks you through training the Similar Demands solution definition for finding similar demands.

Before you begin

Role required: piwb_manager

Procedure

1. Navigate to **All** > **Predictive Intelligence Workbench** > **Use Cases** > **Create New from Template**.
2. Select the **Similar Demands** template.
3. Click **Start**.
   The use case set up window opens displaying the name and description of the use case.
4. Click **Take me there**.
   The **ServiceNow Machine Learning Solutions** page opens and displays all the available solutions.
5. Expand the **Similarity** solution to see the available solution definitions.
   Configure or train the **Similarity** solution for finding similar demands.
   - To configure the Similar Demands solution definition (ml_sn_global_global_similar_demands), click **Configure**. For more information, see Train the similarity solution for Demand Management to find similar demands.
   - To train the Similar Demands solution definition (ml_sn_global_global_similar_demands), click **Train**.

Demand Management reference

Reference information to provide additional details about Demand Management such as the fields, user roles, tables, guidelines, and domain separation information.

Demand tasks

A demand task is a unit of work, created within a demand, to break down initial planning activities before converting the demand into a project, change, enhancement, or defect.

You can create a demand task from the **Demand Tasks** related list to delegate activities that are helpful for assessing demand feasibility. Demand tasks differ from project tasks in the following aspects:

- Planned dates, actual dates, and original dates are part of project tasks not demand tasks.
- The due date indicates the date on which the task is targeted for completion and does not affect the demand workflow. Project tasks, however, affect the project completion dates if the planned dates and actual dates are changed.
- Do not support creation of nested demand tasks.
- Do not support task constraints such as the settings Start ASAP and Start on specific date.
- Do not support an execution type such as Agile, Waterfall, or Hybrid.

Resource assignment

Assign resources for a demand task using the **Assigned to**, **Additional Assignee list**, and **Assignment Group** fields. Do not create and use resource assignments for allocating resources or groups to a demand task or to submit the time spent on the demand. If you associate a

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resource assignment with a demand task, the associated resource plan is not transferred to the work entity created from that demand.

The resource assignments are not associated with the demand by default. Make sure that you do not use the resource assignments that you created for the future work entity created from the demand to submit the time spent on a demand.

When you submit a time card for a demand, the time and cost incurred are not transferred to the work entity created from the demand and remain within the demand as the demand cost and effort.

Resources assigned to a demand task can submit the time spent on it using a time card. For more information, see Submit a time card for a demand task.

Actual cost and effort for a demand task

The actual effort of the work performed on the demand task is derived from the time card. The actual cost is derived from the hourly resource rate defined in the rate model, default labor rate, or default system property. The actual cost and effort for a demand task are then rolled up to derive the actual cost and effort for the associated demand. For more information, see Actual cost and effort calculation for a demand and demand task.

Add work items to a Demand

Based on the selected demand task category and role assigned to you, you can use the demand task form to:

- Add a cost plan to a Demand
- Add a resource assignment to a Demand
- Add a benefit plan to a Demand
- Add risks to a Demand

Actual cost and effort calculation for a demand and demand task

The actual cost and effort are realized cost incurred and time spent for the work performed on a demand and demand task during a specific time period. Actual cost and effort are calculated based on the approved time cards and hourly rate for the resources and vary based on how the hourly rate for the resource is derived.

Working on a demand task and demand involves cost and time, which add to the overall expenditure of converting a demand to a product, feature, or enhancement. Demand managers therefore need to know the actual cost and effort incurred in assessing and planning activities for a demand. The calculation for actual cost is derived by multiplying the hours reported in the time card by the hourly rate of the resource. The actual effort for a demand task is calculated based on the hours reported in the time card.

The actual effort and cost for the demand tasks are then rolled up for calculating actual effort and cost for the demand. The calculation of the actual cost and hourly rate for a resource is derived as follows:

- If a rate model is associated with the demand, the actual cost is calculated based on the hourly rate defined in the rate model.
- If a rate model is absent or if an hourly rate is not found in the rate model, then the hourly rate is derived from the default labor rate.
- If an hourly rate is not found in the default labor rate, then the hourly rate is derived from the default system property.

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Do not create and use resource assignments for allocating resources or groups to a demand task. The resource assignments that you create in the demand are used for the resource estimation of the work entity that would be created from the demand. These resource assignments are automatically moved to the resulting work entity when a demand is qualified and converted.

When you submit a time card for a demand the actual effort and cost are not reflected in the resource assignment, as the resource assignments are not associated with the demand by default. The actual cost and actual effort for the demand remains with the demand and are not transferred to the project created from the demand even if you manually associate a resource assignment with the demand.

If a resource spends extra hours working on a demand that are not associated with demand tasks, then this time must also be recorded. The resource submits the time card for recording the extra hours spent on the demand using the Time Sheet Portal. This extra cost and effort is added to the demand but is not reflected in the actual cost and effort for the demand tasks.

The actual cost and actual effort for the demand as derived from the time card data is added to the total actual cost and effort for the demand tasks. The values in the **Demand Actual Cost** and **Demand Actual Effort** fields are calculated as follows:

- Demand Actual Cost: actual cost of all the demand tasks + actual cost of extra activities
- Demand Actual Effort: actual effort of all the demand tasks + actual effort of extra activities

If a demand has no task or assigned resource, you can capture the actual cost by submitting a time card against the demand. Once the time card is approved, an expense line is created on the demand. The expense line is then processed and the actual cost of work for that time card is rolled up to the demand into the Demand Actual Cost column.

The following example demonstrates the actual cost and effort calculation for a demand task and its rollup to the demand.

Example: Actual cost and effort calculation based on demand tasks

For a demand (D1), the demand manager delegates activities such as initial assessment, cost estimate, and effort estimate. To delegate these activities, the demand manager creates three demand tasks (DT1, DT2, and DT3) and assigns resources R1, R2, and R3 to each demand task respectively.

The hourly rate defined for the resources in the rate model, default labor rate, and default system property are listed in the following table.

Hourly resource rate

Resource	Hourly rate in the rate model	Hourly rate in the default labor rate	Hourly rate in the system property
R1	$200	$150	$50
R2	$250	$200	$50
R3	$150	$100	$50

Each resource spends a total of eight hours while working on the assigned demand task and submits a time card.

Actual cost and effort calculation for demand task: The demand task actual cost and effort are calculated and displayed on the **Demand Task** form. The totals differ depending on the method used to derive them.

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Scenario 1 shows how the total is calculated if the resource hourly rate is derived from the rate model.

Rate derived from the rate model

Actuals	Demand task DT1	Demand task DT2	Demand task DT3
Actual effort	8 hours	8 hours	8 hours
Actual cost	200 * 8 = $1600	250 * 8 = $2000	150 * 8 = $1200

Scenario 2 shows how the total is calculated if the rate model is not associated with the demand and the resource hourly rate is derived from the default labor rate.

Rate derived from the default labor rate

Actuals	Demand task DT1	Demand task DT2	Demand task DT3
Actual effort	8 hours	8 hours	8 hours
Actual cost	150 * 8 = $1200	200 * 8 = $1600	100 * 8 = $800

Scenario 3 shows how the total is calculated if the rate model is not associated with the demand and the resource hourly rate is derived from the default system property.

Rate derived from the default system property

Actuals	Demand task DT1	Demand task DT2	Demand task DT3
Actual effort	8 hours	8 hours	8 hours
Actual cost	50 * 8 = $400	50 * 8 = $400	50 * 8 = $400

Example: Actual cost and effort roll up to a demand

The **Demand Actual Cost** and **Demand Actual Effort** fields on the Financials tab of the Demand form are populated with the sum of actual costs and actual effort of all the demand tasks.

1. If the resource rate for demand task is derived from rate model (Scenario 1), the value in the Demand Actual Cost field is displayed as $4800. The value in the Demand Actual Effort field is displayed as 24 hours.
2. If the resource rate for demand task is derived from the default labor rate (Scenario 2), the value in the Demand Actual Cost field is displayed as $3600. The value in the Demand Actual Effort field is displayed as 24 hours.
3. If the resource rate for demand task is derived from the default system property (Scenario 3), the value in the Demand Actual Cost field is displayed as $1200. The value in the Demand Actual Effort field is displayed as 24 hours.

Demand Management key terms

Important terms in Demand Management are listed in the table.

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Demand Management Key Terms

Term	Description
Portfolio	A collection of demands managed as a group to achieve strategic and operational objectives.
Assessable record	A demand record that you want to evaluate for metric type demand. You evaluate the assessable records with metric categories and metrics, which define traits and values to assess.
Metric	A trait or value used to evaluate assessable records. A metric can measure subjective values in an assessment questionnaire or gather objective values in a database query run by a script. Examples of metrics include perceived value of demands and return on investment for a demand.
Metric type	A characteristic that defines a set of records you want to evaluate. Demand management comes with the metric type demand, which uses records from the Demand [dmn_demand] table.
Metric category	A theme for evaluating assessable records. Categories contain one or more individual metrics, which define specific traits or values that comprise the theme. Examples of categories include return on investment and cost. Set filter conditions to control which assessable records to evaluate for the metrics in a category.
Stakeholder	A person affected by the demand or who has interest in the demand.
Scorecard	A visual breakdown on performance of an assessable record based on assessment results. Use scorecards to view various data summaries for one assessable record and to compare the ratings with other assessable records.
Requirement	An extra item that must be present or an extra action item that must be finished before a demand request closes.
Demand Task	A unit of work, created within a demand, to break down initial planning activities before converting the demand into a project. A demand task is not a planned task like a project task.

Stage fields

The Stage field on the Ideas list displays the current state of an idea as it moves through the demand life cycle. The current state includes from an idea to a demand and then to the resulting project, enhancement, change, or defect.

The result of an idea depends on the initial settings in the **Category** and **Type** fields on the Demand form. The **Stage** field also appears on the Demands list. The **Stage** field is a display only field and cannot be searched or sorted.

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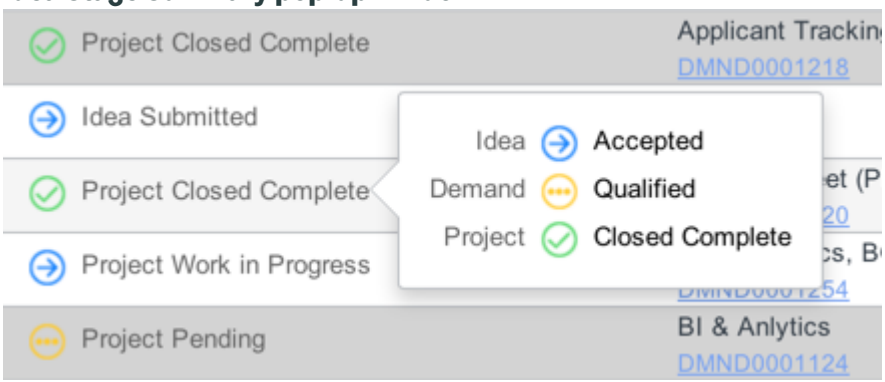
Important:
The **Stage** fields are no longer available starting from the New York release. Any instance provisioned in New York or later will not have a Stage field on the Idea table. However, the **Stage** fields are available if you are upgrading from an older releases to New York or later.

A new idea is created in the **Submitted** state. An accepted idea is updated to the **Accepted** state and a deferred idea is updated to the **Skipped** state. When a demand is closed, the associated idea is marked as **Complete**.

Pointing to the **Stage** field displays a pop-up window that shows the progression of the idea along with the value of the **State** field for each step in the progression.

- **Idea:** if an idea is being evaluated, the pop-up window displays the current state of the idea.
- **Demand:** if an idea is promoted to a demand, the pop-up window displays the current state of the demand as well as the idea.
- **Project**, **Enhancement**, **Change**, or **Defect**: if a demand is accepted, the pop-up window displays the current state of the resulting project, enhancement, change, or defect in addition to the demand and idea.

Idea Stage Summary pop-up window

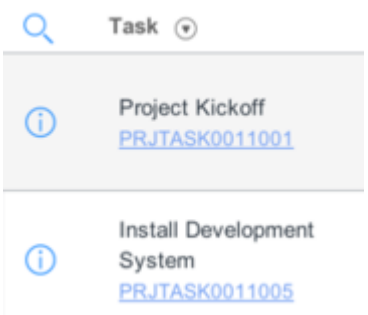


Composite Fields

A composite field combines information from two fields in a table to form a single field.

For example, the **Task** field on the Project Tasks list displays the short description and the project task number. The short description appears above the project task number. The project task number appears and is a link to the Project Task form.

Composite field



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Use a composite field

- Editing a composite field changes the short description. Editing the short description changes the composite field.
- Sorting on a composite field is based only on the short description and not the number.
- Searching on a composite field is enabled for both the short description and the number:
  - To search by the number using the list header, enter an asterisk (*) before the search term. For example, *PRJTASK0010016.
  - To search by the number using the filter, create a condition similar to: [Task] [contains] [PRJTASK0010016].

Domain separation and Demand Management

Domain separation is supported in Demand Management. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

Related topics

Domain separation for service providers

Data migrated from demands to artifacts

Data fields that are migrated from a demand to an artifact when the artifact is created from the demand.

Data migrated from a demand to a created project

Data fields are migrated from a demand to a project when the project is created from the demand.

Field type	Description
Demand	The following demand fields are migrated to a project: • Description • Business case • Investment Class • Investment Type

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Field type	Description
	• Risk of performing • Risk of not performing • Enablers • Barriers • In scope • Out of scope • Assumptions • Business Unit • Department • Impacted Business Units • Business Capabilities • Priority • Impact • Rate Model • Approved start date • Approved end date • Short description • Program • Domain • Goals • Strategies • Impacted Business Applications • Configuration item • Company • Urgency • Project Manager • Project currency • Project calculation
Resource assignments	Resource assignments are migrated to a project by updating the task reference from the demand to project.
Requirements	Demand requirements.
Financial records	Financial records such as cost plans and breakdowns, benefit plans and breakdowns (monetary and non-monetary), and demand budgets are migrated to a project. This process updates the task reference from demand to project.

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Field type	Description
RIDAC	RIDAC entities are migrated to a project by updating the task reference from demand to project. The migrated entities include the risks, issues, decisions, project actions, request changes, and RIDAC_m2m records.
Assessment	The following assessment data fields are migrated to a project: • Risk • Value • Score • T-Shirt size
Stakeholders	Stakeholder records.
Project Currency Financial	If the multicurrency feature is active, the project financial fields are calculated according to the project currency and reference rate.

Demand Management forms

Field information for forms used in the Demand Management application.

Action form

Use an action form to add an action to a demand.

Action form

Field	Description
Number	System-generated number with a configurable prefix.
State	Current state of the action. All new action records are created with the state set to Open. The available states are: Pending, Open, Work in Progress, Closed Complete, Closed Incomplete, and Closed Skipped
Priority	Urgency for implementing or approving the action based on impact.
Estimated Cost	Estimated cost the action generates.
Impact	The impact on the outcome of the demand if you do not implement the action.
Approval	Status of approval from the stakeholders for the action. The available options are: Not Yet Requested, Requested, Approved, and Rejected.
Assigned to	Primary resource assigned to implement the action.
Due date	Requested date on which the action must be approved or implemented.
Parent	The demand to which this action belongs.

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Action form (continued)

Field	Description
Short description	Brief description of the action such as what the action entails, how to implement the action, who it affects, and the action outcome. As you start typing the title for your action, the related actions that potentially match your action title appear. Click the Suggestion icon ( ) to select a description from the list of predefined actions.
Description	Details of the action and its potential impact.
Work notes	Information about the action. Add work notes to communicate about the status of action approval, rejection, or implementation with other users.

Cost plan form

Use the cost plan form to capture the costs of demands.

Cost plan form

Field	Description
Name	Descriptive name for the cost plan.
Project/ Demand	Demand number to which the cost plan belongs.
Start fiscal period	Starting fiscal period. When you change the start fiscal period, the associated cost breakdown values also change.
End fiscal period	Ending fiscal period. When you change the end fiscal period, the associated cost breakdown values also change.
Group	This field is a read-only field.

Financials section of the Cost plan form

Field	Description
Entered currency	Currency for the cost plan. If the selected currency is different from the default currency configured in the Financial Management application, the budget reference rate is used to calculate the cost of the demand.
Unit cost	Cost of single unit of the resource.
Quantity	Quantity of resource required.

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Financials section of the Cost plan form (continued)

Field	Description
Recurring	Indicates if the cost is recurring for each fiscal period. **Quantity** x **Unit cost** value is incurred for every fiscal period.
Cost type	Cost type of the plan. See Create a cost type definition.
Investment	Name of the investment created for the project. This field appears only if the legacy Investment Funding (com.snc.investment_funding) plugin is activated or the Investment Funding (sn_invst_pln) application is installed.
Source type	Funding entity to associated with the project investment for funding. This field appears only if the legacy Investment Funding (com.snc.investment_funding) plugin is activated or the Investment Funding (sn_invst_pln) application is installed.
Source	Funding entity value from which you request fund. The field is available when you select a value in the Source type field. This field appears only if the legacy Investment Funding (com.snc.investment_funding) plugin is activated or the Investment Funding (sn_invst_pln) application is installed.
Total planned cost	Total planned costs of the cost plan. If the cost is recurring, the calculation is **Quantity** x **Unit cost** x **number of fiscal periods**. If the cost is non-recurring, the calculation is **Quantity** x **Unit cost**. This value is rolled up from cost breakdown.
Functional currency	The default currency configured in the Financial Management application and used for managing the demand or project.
Cost in functional currency	The total planned cost for the demand in functional currency. The value in this field

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Financials section of the Cost plan form (continued)

Field	Description
	changes if the **Entered currency** is different from the functional currency.
Total actual cost	Total actual costs of the cost plan. This value is rolled up from cost breakdown.

Decision form

Use a decision form to add a decision to a demand.

Decision form

Field	Description
Number	System-generated ID number with a configurable prefix.
State	Current state of the decision. All new decision records are created with Open state. The available states are: Pending, Open, Work in Progress, Closed Complete, Closed Incomplete, and Closed Skipped
Priority	Urgency of approving or implementing the decision based on possible impact.
Decision status	Status of the decision. The available options are: Pending, Approved, and Rejected.
Impact	Impact on the outcome of the demand if you do not implement the decision.
Approval required	Option for determining whether approval of the decision is required.
Estimated Cost	Estimated cost of implementing the decision.
Due date	Requested date on which the decision must be approved or implemented.
Assigned to	Primary resource assigned to work on the decision. The default value is the name of the user creating the decision record.
Parent	Demand number to which this decision belongs.
Short description	Brief description of the decision such as what the decision is about, who made it, what it affects, and the decision outcome. As you start typing the title for your decision, related decisions that potentially match your decision are displayed. Click the Suggestion icon ( ) to select a description from the list of predefined decision descriptions.
Description	Details of the decision and its potential impact.
Work notes	Information to record and track the status of decision implementation or approvals.

Demand Budget form

Use the Demand Budget form to allocate a budget to your demand.

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Demand Budget form

Field	Description
Fiscal Year	The fiscal year for which you want to set the budget for the demand.
Currency	Currency in which you want to allocate the budget for the demand. If the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin is active, then you can allocate the budget in demand currency or functional currency.
Capex Budget in Demand Currency	Planned expense amount allocated for capital expenditure in the selected currency.
Opex Budget in Demand Currency	Operating expense amount in the selected currency.
Total Budget in Demand Currency	Sum of Capex and Opex amounts.

Demand form

The demand form information is used to create a demand.

Demand form fields

Field	Description
Name	Name of the demand.
Category	Category of the demand: • Strategic: For demands for plans, such as projects or stories. • Operational: For demands for operational work, such as changes or defects.
Type	The **Category** field selection determines the selections available in the **Type** field. • The following demand types are available if the demand category is Strategic: ○ Continual Improvement Management ○ Enhancement ○ Project ○ Epic ○ Story ○ SAFe Epic ○ SAFe Story ○ SAFe Feature ○ No Conversion • The following demand types are available if the category is Operational:

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Demand form fields (continued)

Field	Description
	○ Change ○ Defect ○ No Conversion If the Agile Development 2.0 application is active, the Story, Epic, Enhancement, and Defect options are available. If the Essential SAFe or Portfolio SAFe features are active, the SAFe Story, SAFe Feature, and SAFe Epic options are available. The No Conversion option enables you to use your demand to fund a large project that includes one or more projects, epic, or programs. The selections in the **Category** and **Type** field also determine the fields that are displayed in the Assessment Data section.
Project	Name of the project created from this demand. This read-only field is visible only when you convert the demand into a project.
Enhancement	Number of the enhancement created from this demand. This read-only field is visible only when you convert the demand into an enhancement.
Epic	Name of the epic created from this demand. This read-only field is visible only when you convert the demand into an epic.
Story	Name of the story created from this demand. This read-only field is visible only when you convert the demand into a story.
Number	Unique, auto-generated identification number for the demand.
Approved start date	The formal date approved by stakeholders for starting the demand. This date is set after prioritization and stakeholder approval and represents the committed and authorized timeline for execution. It's used for governance and traceability. For example, the approved date to start the database upgrade is 2026-01-10. This field is carried forward to the **Approved start date** field of the Project form if the demand is converted to a project and remains unchanged, even if the project starts later. This field is highlighted in red if the date is different than the value in the **Start date** field. **Note:** If this field is empty while creating a demand, the date from the **Start date** field is inserted.

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Demand form fields (continued)

Field	Description
Approved end date	The formal date approved by stakeholders for completing the demand. This date is set after prioritization and stakeholder approval and defines the approved execution window and supports historical tracking. For example, the approved end date to complete the demand is 2026-02-15. This field is carried forward to the **Approved end date** field of the Project form if the demand is converted to a project and remains unchanged, even if the project ends later. This field is highlighted in red if the date in this field is different than the value in the **Due date** field. **Note:** If this field is empty while creating a demand, the date from the **Due date** field is inserted.
Start date	The preliminary or estimated date when the work is initially planned to begin. This date helps outline the intended timing for early demand planning and prioritization. You can set this date during initial demand creation or anytime in the planning phase when a rough idea forms. This date can be updated until the demand is officially approved. For example, you're planning for a database upgrade to start on 2025-11-01. This date is changed to **Planned start date** when the demand is converted to a project. **Note:** When you change the planned start date of a demand or project, the associated cost plans and resource assignments also change. The **Change Resource Plan and Cost Plan Start Date with Demand or Project Start Date Change** property controls the behavior for a demand date change. This property isn't enabled by default. For more information, see and Properties installed with Project Management.
Due Date	The preliminary or estimated date when the planned work is expected to be completed. This date provides an expected completion window for planning and stakeholder communication. You can set this date anytime in the planning phase when a rough idea forms and can be updated until the demand is officially approved. For example, you're planning to complete the database upgrade by 2025-12-31. This date is changed to **Planned end date** when the demand is converted to a project.
Description	Description of the demand.
Similar demands	Demands that have similar values for the **Short description** fields using predictive intelligence and machine-learning algorithms. For more information, see Predictive Intelligence for Demand Management.
Related Search	Search results matching the specified term. The default is the value in the **Name** field.

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Details section of the Demand form

Field	Description
Portfolio	Portfolio indicating the business focus of the demand.
Program	Name of the program to which the demand belongs.
Investment Class	Type of investment class category assigned to the demand: • Run: Investment made to sustain the existing business. • Change: Investment made to implement a change in the business.
Investment Type	Investment type of the demand: • Cost Reduction • End User Experience • Legal and Regulatory • Revenue Generating • Service Sustaining • Strategic Enabler • Artificial Intelligence
Demand Manager	Name of the demand manager.
Collaborators	Users who can edit or contribute to the demand. A demand requester can select any user as a collaborator.
Expense type	The type of the expense, either capex (capital expense) or opex (operational expense).
Priority	The priority of the demand.
Department	Department in a business unit to which the demand submitter belongs. **Note:** If you don't select a department, the default value is the name of the department to which the submitter belongs.
Project Manager	Project manager that would be assigned to the project created from this demand. When a project is created, this field becomes read only. This field appears if the **Category** field is set to Strategic and the **Type** field is set to Project. If you delete the project created from this demand, this field becomes editable.

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Details section of the Demand form (continued)

Field	Description
Business Unit	Business unit to which the demand submitter belongs.
Impacted Business Units	Business units affected by the submitted demand. The selected units could experience operational impact, process changes, technology adoption, and so on. For example, if a demand is submitted by the procurement business unit, it can impact the finance, legal, and IT business units.
Idea	Unique identification number of the idea from which the demand was created.
Business Capabilities	Business capabilities associated with the demand that links the demand to organizational goals and value. Business capabilities are defined in the Enterprise Architecture (formerly Application Portfolio Management) module.
Impacted Business Applications	If the demand is to change, enhance, or add one or more business applications, the applications associated with the demand. Business applications are defined in the Enterprise Architecture (formerly Application Portfolio Management) module. For more information, see Business applications. You can select any business application in your enterprise regardless of whether it's related to a capability selected in the **Business Capabilities** field.
Business Applications	If the demand is to change, enhance, or add one or more business applications, the applications associated with the demand. Business applications are defined in the Enterprise Architecture (formerly Application Portfolio Management) module. For more information, see Business applications. You can select any business application in your enterprise regardless of whether it's related to a capability selected in the **Business Capabilities** field.

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Business Case section of the Demand form

Field	Description
Strategic priority	Strategic objectives of the organization that the demand fulfills. A demand can fulfill multiple strategic objectives. If a business unit has been selected in the **Details** tab, the business strategies for the selected business unit along with other enterprise strategies are available for selection.
Primary goal	The primary goal associated with the strategy selected in the **Strategic priority** field. If a strategy hasn't been selected, all goals are available for selection.
Business case	Business arguments that support the demand.
Risk of performing	Risks if the demand is approved and implemented.
Risk of not performing	Risks if the demand isn't approved, for example, risk of loss of opportunity.
Enablers	Key enablers for the demand that would aid the demand to be completed. For example, clearly defined resource and cost plans.
Barriers	Major barriers to the demand that would obstruct the demand's completion. For example, incomplete or unclear demand details.
In scope	Scope of the demand, which is the set of boundaries that define the extent of a demand.
Out of scope	Activities or deliverables not in the scope of the demand. Anything not defined in the scope is out of scope.
Assumptions	Assumptions made for the demand. Assumptions help to define the scope and risks, and fine-tune the estimates for time and cost.

Financials section of the Demand form

Field	Description
Rate Model	Rate model assigned to the demand. This setting is used to derive hourly rates for the associated resource assignments and time cards. For more information, see Rate Models.

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Financials section of the Demand form (continued)

Field	Description
	Note: If the rate model assigned to the demand is changed or removed, the cost fields on the associated resource assignments aren't recalculated.
Project Currency	Currency used to execute the project once the project is created from this demand. You can select any active currency from the values listed in the Currency [fx_currency] table. After you create a project in the selected project currency, you can't change the project currency in the Project form if the demand contains a cost plan, a benefit plan, or a project budget. If the demand has no attached plan or budget, you can change the project currency in the Project form. **Note:** The value of this field defaults to the **Project currency** field of the **Financials** tab in the project currency view of the Project form as well. This field is available only when the PPM Standard Multicurrency (com.snc.ppm_multicurrency) feature is activated and the **Demand Currency** view is enabled.
Capital expense	Capital expenditure (capex) for the demand.
Operating expense	Operational expenditure (opex) for the demand.
Total planned costs	Result calculated based on the values in the **Capital expense** and **Operating expense** fields.
Financial return	Result calculated based on the values in the **Total costs** and **Financial benefit** fields.
Financial benefit	Estimate of revenue if the demand is approved. This value is rolled up from the benefit breakdown of the demand. You can also enter the value manually by selecting a currency icon and entering a value.
ROI %	ROI calculated based on the values in the **Total costs** and **Financial return** fields.

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Financials section of the Demand form (continued)

Field	Description
	The value in this field is updated when a cost plan, benefit plan, or resource assignment is created or updated for the demand in the Qualified or Approved state.
Capital budget	Total capital budget allocated to the demand across all fiscal years. The value is rolled up from the capex budget of the demand.
Operating budget	Total operational budget allocated to the demand across all fiscal years. The value is rolled up from the opex budget of the demand.
Discount Rate %	Demand discount rate, which is the interest rate to determine the present value of future cash flows.
Net present value	Present value of future cash based on the given annual interest rate, a measure for comparing money spent today against future expected financial benefits. This value is useful when evaluating the overall investment performance. For example, at a 12% discount rate, $1.00 today is worth $0.80 in two years. Therefore, receiving $1.00 in two years is the same as receiving $0.80 today. Net present value (NPV) is calculated from total costs according to year, financial benefit per year, and the discount rate for the demand.
Internal rate of return %	Annual interest rate required to achieve an NPV of zero. Internal rate of return (IRR) helps to determine which demands can deliver a higher rate of return in terms of revenue.
Demand Actual Cost	Total cost incurred while working on a demand and demand tasks. Demand actual cost is calculated after the assignee of the demand task creates and submits a time card. When the time card is approved, the resource rate, which is derived from the rate card, labor rate, or system properties, is used to populate this field.

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Financials section of the Demand form (continued)

Field	Description
Demand Actual Effort	Time accrued or spent by a resource while working on a demand or a demand task as derived from the submitted and approved time cards. This field isn't available on the Demand form by default.

Note:
If you're creating a demand with the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin activated and the **Demand Currency** view enabled, then the fields in the **Financials** tab differ from the **Default** view. For more information about the fields that are available only in the Demand Currency view, see Multicurrency in Demand Management.

Assessment Data section of the Demand form

Field	Description
Impact	Level of business impact created by the demand.
Risk	Risk value calculated from the demand assessment.
Value	Business value of the demand calculated from the **Impact** and **Financial return** fields.
T-Shirt size	Size of the demand. Before using this value as an indicator of demand size, consider creating and publishing definitions for each option outside the application. That process ensures that the values are interpreted correctly and consistently across the organization or department.
Score	The demand score is calculated based on the *risk*, *value*, and *size* attributes in the base system. The value of the *risk*, *value*, and *size* attributes are derived from the assessment metric category results. For more information, see assessment categories and assessment category results. • When the *risk* and *size* values are high, the score of the demand is low. • When the *value* setting is high, the score of the demand is high.
Assessment Required	Option for enabling the assessments for the demand. This option is active by default.

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Assessment Data section of the Demand form (continued)

Field	Description
	Only a demand manager can update this value when the demand is in the Draft or Submitted state. **Note:** If this option isn't selected and you reset the demand to the Draft state, the option remains unselected.

Note:
The values in the **Value** and **Score** fields are updated when a cost plan, benefit plan, or resource assignment is created or updated for the demand in the Qualified or Approved state. The values in the fields are updated only until an artifact such as project, enhancement, defect, or change is created from the demand.

Notes section of the Demand form

Field	Description
Watch list	The groups and users subscribed to the demand who can view the information in the **Additional comments** field.
Work notes list	The groups and users subscribed to the demand who can view the information in the **Work notes** field.
Work notes	Information about the demand. This information isn't visible to customers. Work notes are added throughout the demand management life cycle to communicate with other users associated with the demand.

Preferences section of the Demand form

Field	Description
Close Demand	Determines when to close the demand automatically if it's converted to a project. • **None**: Keeps the demand in the Open state after it's converted to a project. • **On creation of project**: Closes the demand when the demand is converted to a project. • **On closure of project**: Closes the demand when the project created from the demand is closed.

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Preferences section of the Demand form (continued)

Field	Description
	Note: The **On creation of project** and **On closure of project** options appear when the value for the **Type** field is set to **Project**. If the **Type** field is set to **Enhancement**, the default setting is **None**.
Project Calculation	Determines the calculation to use for task dependencies for the project when the demand is converted to a project. The default value is Automatic. • Manual: Task dates don't reflect any changes made to dependencies. • Automatic: Task dates are automatically updated to reflect any changes made to dependent or child tasks.

Demand task form

Use the demand task form to create tasks for a demand.

Demand Task form

Field	Description
Short description	Name of the demand task.
Assignment group	Group assigned to the demand task.
Assigned to	Primary resource assigned to the demand task. The following conditions apply: • If an assignment group is defined, only users in the assignment group are listed. • If skills are defined, only users with those skills are listed. • If no assignment groups or skills are defined, only users with one of the Project Management application user roles are listed. • Users with `timecard_user` role are also listed.
Additional assignee list	Users assigned to the demand task in addition to the single primary resource defined in the **Assigned to** field.
Category	Category of the demand task:

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Demand Task form (continued)

Field	Description
	• Initial review • Effort estimate • Cost estimate • Benefit estimate • Risk assessment The **Category** field selection determines the links available in the related links. For example, the **Add Resource Plan to Demand** related link appears when you set the **Category** value to Effort estimate. Users must have the appropriate role to use these related links.
Actual effort	The actual time spent working on the demand task, which is derived from the approved time card for this demand task. Because this field does not appear by default on the Demand Task form, you must add it by personalizing the form.
Description	Brief description of the demand task.
Number	System-generated ID number with a configurable prefix.
Priority	Sequence in which the task needs to be completed based on impact and urgency.
State	Current state of the demand task. The states include Pending, Open, Work in Progress, Closed Complete, Closed Incomplete, and Closed Skipped.
Due date	The date by which the task is targeted for completion.
Actual cost	The actual cost of the demand task derived from the number of hours worked and hourly rate of the resource as defined in the rate card. In the absence of a rate card, the hourly rate is derived from the default labor rate card or default system property.
Work notes	Information about the demand task. Work notes are added throughout the demand management life cycle to communicate with other users associated with the demand.

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Demand Task form (continued)

Field	Description
	Note: Users with the business stakeholder role for PPM can view this field. For more information, see Business stakeholder role for PPM.

Expense line form

Use the expense line form to associate specific costs to a demand.

Expense line form

Field	Description
Number	Auto generated number.
Amount	Select a currency type and enter the expense cost.
Date	Date of the expense generated.
Process date	Date on which the expense line was processed.
Source ID	Record that generated the associated cost.
State	State of the expense line. The state can be Pending or Processed. The cost roll-up happens only if the expense line is processed.
Cost plan	Name of the cost plan against which you want to create the expense line.
Summary type	Select the category you want to group the expense under.
Cost type	Select the cost type.
Expense type	Select **Capex** for a capital expense or **Opex** for an operating expense.
Short description	Enter a short description of the expense type.
Sources	Select the records for the sources of the expense line. These sources include: • **Assets** • **Fixed assets** • **Contracts** • **Users** • **Configuration items** • **Tasks** • **Cost centers**

Investment Budget form

Use the Investment Budget form to allocate budget for a demand for each fiscal period.

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Investment Budget form details

Field	Description
Amount	Enter the budget amount.
Fiscal period	Select the fiscal period to allocate the budget.
Investment	Select the planning item to allocate this budget. The existing budget is selected by default.
Expense type	Select expense type from the list. • Select **Capex** to allocate your budget to capital expenses. • Select *Opex* to allocate your budget to operational expenses.

Issue form

Use the issue form to add an issue to a demand.

Issue form

Field	Description
Number	System-generated ID number with a configurable prefix.
State	Current state of the issue. All new issue records are created in the Open state. The available states are: Pending, Open, Work in Progress, Closed Complete, Closed Incomplete, and Closed Skipped
Priority	Urgency of resolving or managing the issue based on possible impact.
Estimated cost	Estimated cost the issue generates.
Impact	Impact on the outcome of the demand if the issue remains unresolved.
Due date	Requested date for the assigned resource to resolve the issue or the date on which the issue must be closed or addressed if not assigned to any resource.
Assigned to	Primary resource assigned to work on the issue resolution.
Parent	Demand to which this issue belongs.
Short description	Brief description of the issue and its potential impact on the success of the demand. As you start typing the title for your issue, related issues that potentially match your issue are displayed. Click the suggestion icon ( ) to select from the list of predefined issue descriptions.

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Issue form (continued)

Field	Description
Description	Details of the issue and its potential impact.
Work notes	Information to record and track the work accomplished for resolving the issue.

Monetary Benefit Breakdown form

Use the Monetary Benefit Breakdown form to update the estimated and actual financial benefits for a specific fiscal year.

Monetary Benefit Breakdown form

Field	Description
Task	Task to which the benefit plan breakdown belongs.
Portfolio	Portfolio to which the benefit plan breakdown belongs.
Entered currency	Currency specified in the benefit plan.
Exchange rate	Rate in effect for the period corresponding to the benefit plan breakdown. When the period corresponding to the benefit plan breakdown has multiple rates, the rate in effect on the first date of that period is used. Exchange rate is used to convert the entered benefit into the functional benefit. It is obtained from the itfm_fx_rate [budget_reference_rates] table.
Actual benefit	Actual benefit that is incurred from the project or demand.
Benefit plan	Benefit plan to which the benefit plan breakdown belongs.
Fiscal period	Fiscals generated at the period level. For information on periods, see fiscal calendars.
Entered benefit	Benefit in entered currency.
Functional benefit	Functional benefit obtained by multiplying the exchange rate with the entered benefit.
Exchange rate date	First date of the fiscal period corresponding to the benefit plan breakdown.

Monetary Benefit Plan form

Use the Monetary Benefit Plan form to specify the estimated benefit accrued by a demand for a fiscal period.

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Monetary Benefit Plan form

Field	Description
Name	Descriptive name of the benefit plan.
Work	Demand number to which the benefit plan belongs.
Sponsor	Sponsor for the demand.
Category	Type of benefit: • **Hard**: Benefits that can be measured in terms of revenue. • **Soft**: Benefits that are measured in terms of value.
Sub category	Subcategories of hard and soft benefits. The selection in **Category** field determines the selections available in this field.
Benefit type	Type of benefit. Select **Monetary benefits**.
Offset type	Offset type field indicates when the benefits start realizing. If the value in the selected offset type changes, the benefit plan start date shifts accordingly. For example, if the offset type is set to **End Date** and the due date of the demand changes, the benefit plan start date shifts to align with the new due date of the demand.
Work start date	Start date of the demand. The field appears if you select **Start Date** in the **Offset type** field.
Work end date	End date of the demand. The field appears if you select **End Date** in the **Offset type** field.
Offset	Number of periods before or after the offset type when the benefit plan starts. For example, if the offset type is set to **End Date** and the offset is -2, the benefit plan is two periods before the demand end date. If the demand end date shifts, the benefit plan start date shifts to two periods before the new demand due date.
Duration in periods	The length, in periods, of the benefit plan.
Start fiscal period	Starting fiscal period. Populated based on values in the Offset field relative to the selected Project or Demand start date or Project or Demand end date, and the Duration in period values. The field is editable if you select **None** in the **Offset type** field. When you change the start fiscal period, the associated benefit breakdown values also change.
End fiscal period	Ending fiscal period. When you change the end fiscal period, the associated benefit breakdown values also change.
Associated benefit	Non-monetary benefit that is associated with this monetary benefit plan.
Description	Description of the monetary benefit plan.

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Financials section of the Monetary Benefit Plan form

Field	Description
Entered benefit	Estimated amount of the potential benefit. Any change in the planned benefit on the benefit plan updates the associated benefit breakdown values for future fiscal periods.
Entered currency	Currency for the benefit plan. If the selected currency is different from the default currency configured in the Financial Management application, the budget reference rate is used to calculate the financial benefit of the demand.
Functional currency	The default currency configured in the Financial Management application and used for managing the demand or project.
Total planned benefit	Total benefit value that is rolled up from the benefit breakdown.
Benefit in functional currency	Benefit incurred from demand in functional currency. The value in this field changes if the **Entered currency** is different from the functional currency.
Actual benefit	Actual benefit value that is rolled up from the actual benefit in the benefit breakdown.
Recurring	Check box to indicate if the benefit is recurring for each fiscal period in the benefit breakdown.

Non-monetary Benefit Plan Breakdown form

Use the Non-monetary Benefit Breakdown form to update the estimated and actual non-financial benefits for a specific fiscal year.

Non-monetary Benefit Plan Breakdown form

Field	Description
Task	Task to which the benefit plan breakdown belongs.
Portfolio	Portfolio to which the benefit plan breakdown belongs.
Measure	Measure type specified in the benefit plan.
Actual benefit	Actual benefit that is incurred from the project or demand.
Benefit plan	Benefit plan to which the benefit plan breakdown belongs.

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Non-monetary Benefit Plan Breakdown form (continued)

Field	Description
Fiscal period	Fiscals generated at the period level. For information on periods, see fiscal calendars.
Entered benefit	Benefit in entered value.
Variance	The difference between the estimated and actual benefit.

Non-monetary Benefit Plan form

Use the Non-monetary Benefit Plan form to specify the potential non-financial benefits accrued by the demand, when it's executed.

Benefit Plan form

Field	Description
Name	Descriptive name of the benefit plan.
Work	Demand number to which the benefit plan belongs.
Sponsor	Sponsor for the demand.
Category	Type of benefit: • **Hard**: Benefits that can be measured in terms of revenue. • **Soft**: Benefits that are measured in terms of value.
Sub category	Subcategories of hard and soft benefits. The selection in the **Category** field determines the selections available in this field.
Benefit type	Type of benefit. Select **Non-monetary benefits**.
Offset type	Field to indicate when the benefits start to be realized. If the value in the selected offset type changes, the benefit plan start date shifts accordingly. For example, if the offset type is set to **End Date** and the due date of the demand changes, the benefit plan start date shifts to align with the new due date of the demand.
Work start date	Start date of the demand. This field appears only when **Start Date** is selected from the **Offset type** field.
Work end date	End date of the demand. This field appears only when **End Date** is selected from the **Offset type** field.
Offset	Number of periods before or after the offset type when the benefit plan starts. For example, if the offset type is set to **End Date** and the offset is -2, the benefit plan is two periods before the demand end date. If the demand end date shifts, the benefit plan start date shifts to two periods before the new demand due date.
Duration in periods	The length, in periods, of the benefit plan.

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Benefit Plan form (continued)

Field	Description
Start fiscal period	Starting fiscal period. Populated based on the value in the **Offset** field relative to the selected **Project/Demand start date** or **Project/Demand end date**, and the **Duration in periods** field values. The field is editable if you select **None** in the **Offset type** field. When you change the start fiscal period, the associated benefit breakdown values also change.
End fiscal period	Ending fiscal period. When you change the end fiscal period, the associated benefit breakdown values also change.
Associated benefit	Monetary benefit that is associated with this non-monetary benefit plan.
Description	Description of the non-monetary benefit plan.

Non-monetary Details section of the Benefit Plan form

Field	Description
Measure	Type of measure for the non-monetary benefit plan. The measure types are Count, Percentage, Hours, Days, and Score. Select the option **Yes/No** to track the benefits that aren't quantifiable. When this option is selected, the only field available is **Benefits achieved**. You can select the check box to indicate that the benefits have been achieved.
Non-monetary entered benefit	Estimated value of the potential benefit. Any change in the planned benefit on the benefit plan updates the associated benefit breakdown values for future fiscal periods only.
Non-monetary planned benefit	Benefit value that is rolled up from the benefit breakdown.
Benefits achieved	Option to indicate if the benefit is achieved.
Breakdown type	Type of breakdown creation when you save the benefit plan. • **None**: No breakdowns are created. • **Automatic**: A Non-monetary Benefit Plan Breakdown record is created automatically with data. The breakdown is calculated linearly.

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Non-monetary Details section of the Benefit Plan form (continued)

Field	Description
	• **Manual**: A Non-monetary Benefit Plan Breakdown record is created automatically but without data in the entered benefit column.
Aggregation mode	Determines how the roll-up happens from breakdowns to the benefit plan and updates the values in the **Non-monetary planned benefit** and **Non-monetary actual benefit** fields. • **Sum**: Aggregates data from all breakdowns. • **Average**: Average value from all breakdowns. • **Most recent**: Recent breakdown value. • **Max**: Maximum value among the breakdowns. • **Min**: Minimum value among the breakdown
Non-monetary actual benefit	Actual benefit value that is rolled up from the actual benefit in the non-monetary benefit plan breakdown.

Recalculate resource costs form

Use the recalculate resource costs form to make sure that the resource assignment costs are up to date.

Recalculate Resource Costs dialog box

Field	Description
Start date	Start date of the time period for which the costs are recalculated. By default, the field shows the current date.
End date	End date of the time period for which the costs are recalculated. By default, the field shows the due date of the demand. If the due date is not specified for the demand, the field is empty.
Planned costs for Requested Resource plans	Option for recalculating the planned cost of Requested resource plans.
Confirmed/Allocated costs for Confirmed/ Allocated resource plans	Option for recalculating the confirmed or allocated cost of Confirmed or Allocated resource plans.

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Recalculate Resource Costs dialog box (continued)

Field	Description
Planned costs for Confirmed/Allocated resource plans	Option for including the planned cost of a Confirmed or Allocated plan. The option is enabled if the **Confirmed/ Allocated costs for Confirmed/Allocated resource plans** option is selected. By default, the option is not selected.

Request change form

Use the request change form to change the metrics of a demand, such as demand scope, resource requirement, cost or schedule.

Request Change form

Field	Description
Number	System-generated ID number with a configurable prefix.
State	Current state of the request change. All new request change records are created in the Open state. The available states are: Pending, Open, Work in Progress, Closed Complete, Closed Incomplete, and Closed Skipped
Priority	Urgency for approving the requested changes based on impact.
Estimated Cost	Estimated cost the requested changes generate.
Impact	Impact on the outcome of the demand if you do not approve the requested changes.
Approval	Status of approval from the stakeholders for the requested changes.
Assigned to	Primary resource assigned to work on the request change.
Due date	Requested date to complete the request change.
Category	Entity for which you are creating the request change. The options are: Resource, Scope, Cost, and Schedule.
Parent	Demand to which this request change belongs.
Title	Title for the change request.
Description	Details of the request change and its potential impact.
Business Justification	Reason for requesting the proposed change in the demand and its impact on the business.
Work notes	Additional information to indicate progress on the demand request change.

Requirement form

Use the requirement form to add a new requirement to a demand.

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Requirement form

Field	Description
Number	Unique identification number for the requirement. This number is automatically generated when a new requirement record is created.
Source	User requesting the requirement. This field is automatically populated with the name of the person filling out the form, but the source could be a different person who identified the requirement.
Owner	User who is responsible for managing the requirement or making sure that the requirement is met.
Estimated effort	Approximate amount of time to complete the requirement and any associated tasks.
Priority	Importance of the requirement as it applies to the overall demand.
State	Status of the requirement can be **Pending**, **Approved**, or **Rejected**. **Note:** The request state is independent of the demand request state and of the states of any planned tasks associated with the requirement. The request can be closed without the requirement state being closed. Likewise, closing the request does not change the state of the requirement.
Type	Type of requirement can be: **Business**, **Solution (Functional)**, **Solution (Non-Functional)**, **Quality**, **Stakeholder**, or **Transition**.
Short description	Brief description of the requirement.
Description	Detailed description of the requirement and any associated tasks. For example, you can use this field to describe an expected outcome or result.

Risk form

Use the risk form to add a risk to a demand.

Risk form

Field	Description
Number	System-generated ID number with a configurable prefix.
State	Current state of the risk. All new risks are created in the Pending state. The available states are: Pending, Open, Work in Progress, Closed Complete, Closed Incomplete, and Closed Skipped
Risk status	Status of the risk. The available options are: Pending, Achieved, Not Achieved, Avoid, Mitigate, Transfer, and Accept.
Probability	The likelihood that the event described in the risk occurs. The available options are: Absolute, High, Moderate, and Low
Impact	Impact of the risk event on the outcome of the demand.
Estimated cost	Estimated cost the risk event generates.

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Risk form (continued)

Field	Description
Risk rank	A value and color assigned to the risk. This value is calculated using risk probability and impact. You can configure the color and value using Risk Value Lookup. For more information, see Configure custom Risk rank and Risk value for a demand.
Risk owner	Primary resource who is responsible for monitoring and managing the risk.
Assigned to	Primary resource assigned to work on the risk.
Risk value	A value calculated from Risk Value Lookup. For more information see,Configure custom Risk rank and Risk value for a demand.
Due date	Requested date for the assigned resource to resolve the risk or the date on which the risk must be closed or addressed if not assigned to any resource.
Task	Demand to which this risk belongs.
Short description	Brief description of the event and its potential impact on the success of the demand.
Description	Details of the event and its potential impact.
Mitigation plan	Brief description of the efforts taken to mitigate the risk.
Work notes	Information to record and track the work accomplished for resolving the risk.

Risk value matcher form

Use the risk value matcher form to rate the impact and probability of a risk.

Risk Value Matcher form

Field	Description
Impact	Impact value of the risk. The default values are: • 1 = High • 2 = Medium • 3 = Low
Application	The application to which these risk values belong.
Risk Rank Color	Color to indicate the severity of the risk. **Tip:** You can enter variations of a color to differentiate between risks with similar impact and probability values. For example, you could enter **lightgreen** to indicate a low-severity risk.

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Risk Value Matcher form (continued)

Field	Description
Risk Value	The value for the specified risk impact and probability combination. The options are: High, Medium, and Low. This value is displayed in the **Risk value** field of the Risk form.
Probability	Risk probability value to associate with the impact value of the risk. The options are: Absolute, High, Moderate, and Low.
Probability Number	Numerical value to indicate the probability. This value is multiplied by the value of the **Impact** field for calculating risk rank. The default values are: • 1 = Absolute • 1 = High • 2 = Moderate • 3 = Low The calculated risk rank and the risk rank color are displayed in the **Risk rank** field of the Risk form.

Stakeholder Register Form

Use the Stakeholder Register form to add users to the Stakeholder Registry.

Stakeholder Register Form fields

Field	Description
Number	Unique identification number for the stakeholder. This number is automatically generated when a new entry is created.
User	Name of user being added to the stakeholder registry.
Portfolio	A group of activities managed to align to business or operational objectives. Typically, portfolios are named according to the business units of an organization.
Level of Interest	Level of interest that the stakeholder has in pursuing the demand or project.
Assessment recipient	Indication of whether the user is authorized to receive assessment questionnaires for a demand.
Approver	Indication of whether the user has authority to approve demands or change requests in projects.
Influence	Level of influence the user has over the group assessing the demand or project.
Engagement	Indication of the way the user is engaged with the demand or project.

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Stakeholder Register Form fields (continued)

Field	Description
Function	Function of user in the demand or project process.

Widget Association form

Use the Widget Association form to associate your widget to a demand.

Widget association form

Field	Description
Association ID	Record to associate to the widget. To access the relevant records, you must select the Tables [sys_db_objects] table in the **Table name** list and the Demand [dmn_demand] table in the **Document** list.
Association table	Table to associate to the widget. You must select the Tables [sys_db_objects] table from the list.
Widget	Unique name of the widget.
Order	Position of the widget in relation to other widgets on the Demand Financials page. Widgets appear in numeric order, with the smallest number listed first.
Display on card	Option to display the widget on the Demand Financials page.
Include by default	Option to show the widget by default on the Demand Financials page.

Widget form

Use the widget form to configure a new widget.

Widget form

Field	Description
Name	Unique name for the widget.
Scripted	Option for indicating the value on the widget is from a code script. By default, this option is selected and is read-only.
Show Label	Option for displaying either the label or the color indicator. If you clear the check box, the **Color** field appears and you can set the color.
Active	Option for indicating the status of the widget. Only active widgets are shown on the Demand Financials page.
Parent widget	Widget that is the parent of the current widget. The current widget displays in the Child widgets related list of the selected widget.

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Widget form (continued)

Field	Description
	You can add a maximum of three child widgets for a parent widget.
Formatter required	Option for specifying whether a currency formatter is required for the widget.

Script	Code script that returns a requested metric value that is displayed on the widget.
	
	In the script, use the context and filter objects. The context object contains all of the demand financial fields, such as total_costs, irr_value, and capital_budget.
	
	The following sample script returns the capital budget metric value of a demand to appear on the widget.
	`var context = JSON.parse(context);`
	`var filter = context.filters;`
	
	`var now_GR = new GlideRecord('dmn_demand');`
	`gr.addEncodedQuery(filter['dmn_demand']);`
	`gr.query();`
	`if(gr.next())`
	`gr.getValue('capital_budget');`
	`Collapse`

Short description	Description of the widget.

Project Management

The ServiceNow® Project Management application is a suite of tools that aids in managing projects, tasks, and resources. You can create and manage small projects with a few tasks to large portfolios that contain complex tasks with various relationships and dependencies.

Explore

- Upgrade to Xanadu
- Get started with Project Management
- Basics of Project Management
- Teamspaces

Set up

- Activate project task email notifications
- Project Management costing add-on
- Activate teamspaces

Use

- Project Workspace
- Define a project
- Update a project in progress
- Planning console
- Project workbench

Develop

- Developer training
- Developer documentation

Integrate

Project import and export

Troubleshoot and get help

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- Properties installed with Project Management
- Installed with teamspaces

- Ask or answer questions in the Business Management Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Get started with Project Management

Project Management includes tools to help you create, view, and manage projects.

Watch this six-minute video to learn more about the purpose of Project Management, the project workspace, the project template, baseline, additional project considerations, and viewing the project in the workspace. Introduction to Project and Program Management including the purpose of Project Management, the project workspace and template, baseline, project considerations, and viewing the project.

Project Management consists of following features:

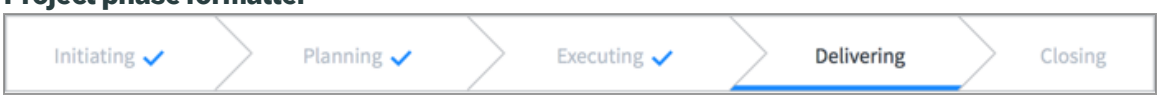
- Project workbench gives project managers the ability to manage the different aspects of a project from a single page. This workbench supports both Project Management and Application Lifecycle Management applications, allowing for a hybrid approach to project management. Project managers can create projects that combine both Waterfall and Agile methodologies by using Waterfall, Agile, and Test phases.
- Project templates define the basic structure of a project, including project tasks and subtasks, attachments, and other project information. The project template feature gives project managers a simple way to create, save, and reuse this project structure.

Project Management also includes features that enable you to achieve your project goals in alignment with the other activities your organization is managing, such as:

- Integration with other features and applications on the platform, such as change management, resource management, and reports.
- Easy-to-read Gantt charts and Work Breakdown Structure lists that help you visualize large projects with complex relationships and dependencies.
- Phase formatter at the top of each project record to highlight the current phase of the project.

  In this example, the project is in **Delivering** phase. The phase is selected in the **Phase** field on the project record.

Project phase formatter



Key terms

Project Management Key Terms

Term	Description
Portfolio	A collection of projects managed as a group to achieve strategic and operational objectives.

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Project Management Key Terms (continued)

Term	Description
Project	Any planned, collaborative effort that is designed to achieve an objective.
Agile project	Any planned, collaborative effort that is designed to achieve an objective and uses Agile.
Project console	A unified graphical interface to the Project Management application, including new WBS hierarchical lists and a new Gantt chart.
Phase	One stage or one segment of a project. Three types of phases can be added to the timeline in the project workbench: • Waterfall phase: contains project tasks. A project can have multiple waterfall phases. • Agile phase: contains stories and can also include a group assignment. A project can have multiple agile phases. • Test phase: contains test cases and can also be associated to a test plan. A project can have multiple test phases.
Story	A brief statement of a product requirement or a customer business case that is used in the scrum method of agile software development. Typically, stories are expressed in plain language to help the reader understand what the software does.
Task	A unit of work within a project. Projects typically contain several tasks.
Test case	A collection of related tests. A test case is saved as part of a test suite and can be added to a test plan.
Checklist	A list of items that must be performed on a project task.
Teamspace	A standalone application built on the Project Portfolio Management applications.

Schedules

Schedules	Description
Project Management Schedule	The default schedule for all new projects, which is Monday to Friday 8 A.M. to 12 P.M. and 1 P.M. to 5 P.M. (for a total of 8 hours), not including weekends.
Default MS Project	The default schedule for projects that you import from Microsoft Project. The schedule is Monday to Friday 8 A.M. to 12 P.M. and 1 P.M. to 5 P.M. (for a total of 8 hours), not including weekends.

Integration with Project Portfolio Management

You can use Project Management as a separate application or it can be activated as part of the PPM.

This application provides a simplified, team-oriented approach to IT development by combining several individual applications and integrating the different components of the project development life cycle.

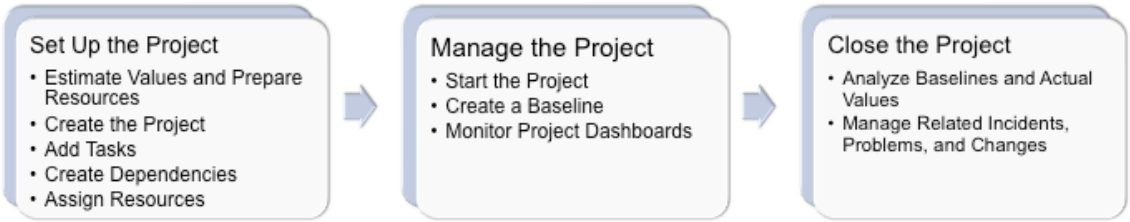
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Basics of Project Management

A project is any planned, collaborative effort that is designed to achieve an objective. The Project Management application not only helps you plan and track projects, it integrates with other applications.

There are several paths available to manage a project. The best path usually depends on business needs. The phases in the graphic are designed to get a project up and running with the minimum amount of effort:

Project phases



Set up the project

Setting up a project involves deciding on an approach for creating and linking project tasks. It also involves creating the necessary users and groups in ServiceNow so you can assign them to project tasks.

Plan the project

Before creating a project, consider the following questions and issues:

- Do you want a top-down or bottom-up approach to tasking?

  Top-down tasking involves creating a project first, then identifying major project phases. Later on, phases can be broken down into tasks and subtasks. The emphasis is on creating estimates for high-level items such as phases and parent tasks and then building the project down from there toward a more detailed level. Use caution when creating tasks for top-down tasking. Creating a task under a project that has a start-on date later than the start date of the project, the project shifts to the later start date. The Project Management application supports bottom-up tasking better.

  Bottom-up tasking involves creating several sets of small tasks and estimating task items such as effort, cost, and duration. These estimations are then aggregated into high-level parent tasks (rollup tasks) and phases. The emphasis is on estimating smaller chunks of work as accurately as possible first, then letting those estimations roll up into parent tasks, phases, and the project itself.

- Is the project part of a larger portfolio of projects?

  Also consider portfolio planning and how the project relates to similar projects or initiatives.

- What types of dependencies do the tasks have with other tasks?

  The Project Management application supports various dependencies. See: Project task relationships and dependencies.

- Can milestones and project baselines help manage a project?

  A milestone is a project task with a duration of 0. Use milestones to indicate important dates in a project. If necessary, create dependencies between tasks and milestones so that a task does not start until a milestone has been reached.

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A baseline is a snapshot of the current planned start and end dates at the time the baseline was created for each task. A line appears under each task on the Gantt chart for the original planned start and end dates. The line appears shifted to the left or right depending on whether the task was started early or late. If tasks slip to later dates, the baseline indicator provides an easy way to see how severe the delays are.

- Have the necessary skills, groups, and resources been created in ServiceNow?

  If project tasks are assigned to different groups or individual resources with the required skills, create users and groups and configure the Skills Management application.

- Does an existing incident, problem, or change justify creating a project to track it?

  Of these record types, a change is most likely to lead to activities that are tracked as a project.

- Do you want to track project costs?

  Estimate group resource costs before starting the project. Then track the actual cost of each user resource from time cards. The Project Management application can also calculate the costs of affected CIs in a project. The Project Management Costing add-on is required to track costs.

- What goals do you want the project to achieve?

  Every project has at least one goal. Project goals are saved in the Goal table and can link to any task. In a typical scenario, link one goal to each project and keep the **State** field of the goal up to date.

Create the project

Create the project in the Project Management application after:

- Choosing an approach
- Gathering initial estimates for the planned start date
- Estimating cost
- Formulating a well-defined business case

Add project tasks, dependencies, and relationships

After creating a project record, create tasks.

- For top-down planning, create a task that you already know includes several child tasks. Then create the child tasks and specify that they are child tasks of the first task you created.
- For bottom-up planning, create tasks for the smallest units of work first. Then you can create intermediary parent tasks that cover a group of related child tasks. For example, if there are five sequential tasks that comprise a phase of a project called install database, create the five tasks first. Then create another task called Database installation and make it the parent task of the five tasks. Rollup calculations, such as **Planned duration**, for the Database installation task are automatically calculated based on the child tasks.

It is easiest to build task relationships and dependencies while creating sets of tasks.

- A dependency means that a task relies on other tasks to be performed (completely or partially) before it can be performed. For information on different types of dependencies supported, see Project task relationships and dependencies.
- A relationship means a parent-child relationship whereby several subtasks are configured under a parent task or phase, which rolls up fields like **Planned duration** and **Estimated cost**.

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Use the Gantt chart with task forms and related lists to build relationships. Add milestones based on the major events of a project and create dependencies between milestones and tasks, if necessary.

Also set up notifications to alert project task assignees when their tasks move to the **Work in Progress** state. See Creating Project Tasks for more information on creating tasks.

Assign resources or assignment groups to the tasks

User resources are the individuals in an organization who are assigned to project tasks. You can manage your resources with resource plans in the Resource Management application.

Add the project to a portfolio

A portfolio is a group of related projects. If the project is related to other projects, create a portfolio and add the project. The Project Management application provides a useful portfolio view that makes it easy to report on the status of all projects in a portfolio. Portfolios also include demands.

Manage the Project

After the preceding steps are complete, the project can be started. To measure the project against initial estimates, create a baseline, which is a snapshot of the entire project including all planned dates for all project tasks and milestones. The project manager can manage a project from the project workbench.

Start the Project

Start the project by changing the project state to **Work in Progress**. When you change the **State** field on the Project form to **Work in Progress**, the Actual start date of the project changes to the planned start date.

Monitor the Project and Customize Dashboards

You can update important project status information, such as the number of milestones slipped. You can also view summaries for cost, scope, project risk, and so on. Modify this information as needed with the **Portfolio View** related list on the Portfolio form and display this information on the **Project Overview** homepage. In addition, use the project reports installed with the application, such as **Active projects** or **Projects (by priority)**, to show important project information.

When the project is underway, continue to access project records and edit several items, including costs, priority, schedule, and planned values that are not rollups. Keep detailed project records for risks and issues and refer to them after a project is complete. Also create baselines along the way to easily see if any project phases or tasks are slipping at the time you create the baseline.

Close the Project

When the project is complete, change its state to **Closed complete** on the project form. When a project is in the closed state, the Project Management application calculates actual values like **Actual duration**.

Post-project activities include analyzing project baselines and actual values and generating a final project dashboard. You can cancel the future resource plans and complete the allocated resource plans for the closed project.

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If the project was successful and can be used as a template for future projects, make a copy of it. If the project was created from a change, incident, or problem record, there are several other activities to perform in ServiceNow.

Properties installed with Project Management

There are several Project properties that you can configure.

You need the PPS admin role to access the Project properties.

Navigate to **Project Administration** > **Settings** > **Preferences - Project** to configure the following properties.

Property	Description
Enable firing of Business Rules on save from Planning Console. This property will be applicable only during insert and delete of tasks and relations. com.snc.project.fire_brs_from_planning_console	If set to true, the project planning console triggers business rules. **Note:** Reload the console if you make changes to this property. Default value: false
Enable move project for WIP projects com.snc.project.move_project.wip	If set to true, this property enables you to move the projects which are in WIP state. **Note:** When a project is moved, only tasks in open and pending state are moved and the project takes the rolled up dates from all the project tasks. Default value: false
Calculate ROI percentage based on a project's estimated cost and its net value com.snc.project.calculate_roi	If set to true, this property calculates the return on investment using the (net value/ estimated cost) x 100 formula. This field is only available from the Advanced view of the Project form. Default value: true

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Property	Description
Enable alter of planned date with Actual for Manual Project com.snc.project.change_planned_date_from_actual_for_manual	If set to true, the property recalculates the planned end date of a manual project from actual start date and planned duration. Default value: false
Enable project cost rollup (estimated and actual) – updating the cost of a project task will update the cost of its parent com.snc.project.rollup.cost	If set to true, this property updates the cost of a parent project task if the cost of the child task is updated. Default value: false
Roll up project start date from tasks com.snc.project.rollup_project_start_date	If set to true, the project planned start date rolls up from the planned start date of the earliest task. Disable this property if you want the project planned start date to remain the same despite the start date of the earliest task. Default value: true
Automatically close project milestone tasks when they change to work state com.snc.project.auto_close_milestones	If set to true, this property closes milestones automatically so you do not have to close them manually. Default value: false
Enable altering of planned date(s) for task in WIP/Closed com.snc.project.enable_alter_of_planned_dates	If set to true, this property enables you to change the planned start date for tasks even if they are in the Work in progress state or any of the closed states. Default value: false
Change Resource Plan, Cost Plan and Benefit Plan Start Date with Demand or Project Start Date change. Benefit Plan Start Date will change only if the offset type for the plan is not None com.snc.project.date_change_cascade	If set to true, this property changes the start dates for a resource plan, cost plan, and benefit plan when there is a change in the project or demand start dates.

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Property	Description
	Note: The start date of benefit plans with the offset type **None** does not change with the project or demand date change. Default value: true
Retain users & resource plan state as confirmed / allocated when project moves com.snc.project.date_change_cascade_persist_resource_plan_state	If set to true, this property retains the confirmed or allocated state of a resource plan, booked resources, and planned daily contour when a property is moved. On moving the project, the resource plan is reallocated or reconfirmed based on the availability of the resources in the future time period to which the project is moved. **Note:** This property is enabled only when the **Change Resource Plan, Cost Plan and Benefit Plan Start Date with Demand or Project Start Date Change** property has been set to true. Default value: true
Create project(s) on confirming demands from portfolio workbench com.snc.project.portfolio_workbench.confirm_to_create_project	If set to true, this property converts all selected demands in a portfolio to projects. Default value: false
List of attributes (comma-separated) that will be copied from the originating project task com.snc.project.copy.additional_attributes	By default, the **Copy Project** and **Copy partial project** options only copy the short description, planned dates, and duration

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Property	Description
	fields from source project to the target project. If additional columns must be copied, they should be declared in this property. Default value: blank
Default the expense type for a new project. sn_plng_att_core.default.expense_type	When a new project is created in the Project Workspace, expense type of the project is marked as Opex.

The following project properties are available in system property [sys_properties] table. Only pps_admin can edit these properties.

Property	Description
Retain start on constraint on tasks after adding relations com.snc.project.allow_start_on_relations	The property keeps the **Start on** selection of a task even after you put the task in a relation to another task, for example, FS relation. Default value: true
Max duration (in days) allowed for a project/project task com.snc.project.task.max_task_duration	The property governs the max duration of a project task or the overall project. **Note:** If your project includes milestones, the duration is calculated taking holidays and weekends into account. Default value: 2600 **Warning:** Increasing the value of the property to more than 2600 will have an impact on memory usage of the platform. A very high value causes out of memory error, for example, if you try to create a project or a project task with 15000 days duration.
Max date span into future or past from the current date for the project/project task com.snc.project.task.check_date_span_years	The property governs the max date in future when entering the planned dates of a project or a project task. Default value: 10

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Property	Description
	Warning: Increasing the value of the property to more than 10 will have an impact on memory usage of the platform. A very high value causes out of memory error.
Synchronize the planned and original dates when creating or updating a project or task com.snc.project.sync_original_dates_with_planned_dates	If set to true, this property synchronizes the planned and original dates. Default value: true

Define a project

Define important aspects of your Agile, Waterfall, or Hybrid project such as the duration, estimated cost, and net value to your organization to efficiently track the project's progress.

Before you begin

Role required: it_project_manager

About this task

You can create a project from the Projects list or from the project planning console. You must have the Agile Development 2.0 plugin to create an Agile or Hybrid project and the Test Management plugin to create a test phase for your project.

Note:
You can also create a project from the demand workbench.

You can also use the multi-currency feature to create a project in a local currency different from your functional currency. You must enable the PPM Standard Multicurrency plugin (com.snc.ppm_multicurrency) and switch to the Project Currency view for the additional fields in the **Financials** tab of the Project form. For more information, see Multi-currency in project financials.

Procedure

1. Create a project in any of the following ways.

2. On the form, fill in the fields.

Project form

Field	Description
Project Name	Name of the project. When you create the project from My Projects Space page, the **Project name** field is automatically populated.
Project manager	Project manager assigned to the project.
Status	Current status of the project. This information is retrieved from the **Overall health** field in

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Field	Description
	the most recent project status report of the project.
Number	System-generated number with a configurable prefix.
Percent complete	Percentage of the project that has been completed.
State	Current state of the project. All new projects begin as **Pending**. The state of the project can be set on the Project form or derived from the task state. The default available states are: Pending, Open, Work in Progress, Closed Complete, Closed Incomplete, and Closed Skipped. You can also create a custom state for each state type by overriding the state dictionary attributes. For example, say that for the project tasks you have created a custom state called **Testing** for the **Work in Progress** state type. When you update the project task state to **Testing**, the project state is also updated to **Testing**. However, if you have not created a **Testing** state for the **Work in Progress** state type, the project state is updated to the default **Work in Progress** state.
Description	Detailed description of the project. **Note:** Special characters are not supported in the project description. Also, avoid copying text from text processor as it ma cause issues while displaying project information on the planning console.
Similar projects	Displays projects that have similar values for the **Description** and **Short Description** fields using predictive intelligence and machine-learning algorithms. For more information, see Predictive Intelligence for Project Management.
Related Search	Displays search results matching the **Name** field by default. You can use this field to search for matching projects using other terms also.

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Dates section of the Project form

Field	Description
Schedule	Work schedule to be used for this project. The default schedule is an 8-hour work day (from 8 a.m. to 12 p.m. and 1 p.m. to 5 p.m.). A day is considered to be a work day and not a 24-hour day.
Approved start date	The date to start the project. This field retains the demand approved start date if the project is converted from a demand. The project schedule is not applied to this date and the date remains unchanged when you add project tasks to your project. This field is highlighted with red color if the date in this field is set to a date later than the **Planned start date** field. **Note:** The approved start date of the project is also carried forward to any sub-project associated with the project.
Approved end date	The date when this project ends. This field retains the demand approved due date if the project is converted from a demand. The project schedule is not applied to this date and the date remains unchanged when you add project tasks to your project. This field is highlighted with in red if the date in this field is set prior to the date in the **Planned end date** field. **Note:** The approved end date of the project is also carried forward to any sub-project associated with the project.
Planned start date	The start date of the project tasks within the project. This date is rolled up from the project tasks. This date is copied from the **Approved start date**. After planned tasks are added, this value is set to the earliest time that the project schedule allows. For example, if the project task is created at 3 a.m. and the default schedule is in use (which has an 8 a.m. start date), then the default task start is 8 a.m. the next day.

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Field	Description
	Note: The planned start date must be within 10 years of the current date. The project property **Max date span into future or past from the current date** controls the behavior for project planned start date. When you convert a demand to a project, the start date of the demand is carried forward as the **Planned start date** for the project. If the demand start date is a weekend and your project follows a project schedule, the **Planned start date** is adjusted to the first working day of the week. When you create the project from My Projects Space page, the **Planned start date** field is automatically populated. You must click the calendar icon and select a date to start the project. Projects do not automatically start on the planned start date. **Note:** ○ When you change the planned start date of a project, the associated cost plans and resource plan also change. The project property **Change Resource Plan and Cost Plan Start Date with Demand or Project Start Date Change** controls the behavior for project start date change. ○ This field is not available when creating a project by default. Use the **Approved start date** field to specify the project start date. Configure the form to display this field. However, this field is available for existing projects and projects converted from a demand.
Planned end date	The end date of the project tasks within the project. After you add tasks, the value in the field is calculated from the tasks. For a manual project, any update to the actual start date does not update the planned end date of the project. Enable the project property **Enable alter of planned date with Actual for Manual Project** to update the planned end date from the actual start date and planned duration.

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Field	Description
	Note: This field is not available when creating a project by default, use the **Approved end date** field to specify the project end date. Configure the form to display this field. When you convert a demand to a project, the due date of the demand is carried forward as the **Planned end date** for the project. If the demand due date is a weekend and your project follows a project schedule, the **Planned end date** is adjusted to the first working day of the week.
Planned duration	Expected duration of the tasks within the project. After you add tasks, the value in the field is calculated from the duration of the tasks. The duration also considers the project schedule, accounting for any non-work time in the schedule. **Note:** The project property **Max duration (in days) allowed for a project/project task** controls the behavior for project planned duration. For example, if the default schedule is used, with a standard 8-hour work day, a project that starts at 8 a.m. on 1 July and ends at noon on 2 July is calculated as 1 day and 4 hours, not 28 hours.
Planned effort	Estimate of the time that it takes to complete the project. This calculation sums up planned effort values for all tasks and stories (in the case of Agile and Hybrid projects) in this project. After you add tasks, this field becomes a read-only, roll-up calculation and overwrites any earlier entry that you made.
Actual start date	Date on which the planned tasks start. The time component in the actual start and end dates depends on the value of the **Derive time component from planned dates** field in the **Preferences** tab when you manually populate the actual dates. However, when you change the **State** or **Percent complete** of the project, the actual dates are auto-populated with the time component copied from the planned dates. The value of the **Derive time component**

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Field	Description
	from planned dates field has no effect on the time component of actual dates in this case.
Actual end date	Date on which the planned tasks ends.
Actual duration	Duration of the project tasks from project start to project closure. As with the planned duration, the actual duration shows the total project time and takes the project schedule into consideration.
Actual effort	Actual number of hours charged to the resources on this project. If you are using the Time Cards application, it automatically calculates the value for this field. It uses the totals for the time worked from the approved time cards of all the resources who worked on a project and all its tasks. **Note:** The actual effort from the stories for Agile and Hybrid projects is also rolled up to the project's actual effort. The field is not editable if the **Update actual effort from time card** field is set to **Yes** on the **Preferences** tab.

Details section of the Project form

Field	Description
Portfolio	Primary portfolio to which the project belongs. A project can belong to multiple portfolios. **Note:** ○ If a project, for which the **Portfolio** field is not set is associated to a portfolio using the portfolio form, then the portfolio name is populated in the **Portfolio** field. ○ If a portfolio is deleted, the portfolio name is removed from the **Portfolio** field on the Project form.
Program	Program to which the project belongs. **Note:** If the **Portfolio** field is not set, you can select from the list of all programs in the system. If the **Portfolio** field is set, you cannot select programs that belong to other portfolios.

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Field	Description
Investment Class	Type of investment class category assigned to the project: ○ **Run**: Investment made to sustain the existing business. ○ **Change**: Investment made to implement a change in business.
Investment Type	Investment type of the project. The default available options are Cost Reduction, End User Experience, Legal and Regulatory, Revenue Generating, Service Sustaining, and Strategic Enabler.
Execution Type	Execution methodology used to run the project: **Waterfall**, **Agile**, and **Hybrid**. The default value is **Waterfall**. The **Execution Type** field selection determines the related links and related lists that are available. For example, the **Agile Planning & Tracking** related link appears when you set the Execution Type value to **Agile**. You must have the appropriate plugins such as Agile Development 2.0 and Test Management to view these related links and related lists. Also, you must have the appropriate role to use these related links and related lists.
Demand	Demand from which the project was created. The field is visible only if the project has a demand associated to it.
Phase	Current phase of the project. In addition to the **Phase** field, the different project phases are also shown at the top of each project record. The selected phase is highlighted. The default phases are **Initiating**, **Planning**, **Executing**, **Delivering**, and **Closing**.
Department	Department in a business unit to which the project belongs.
Business Unit	Business unit to which the project belongs.
Impacted Business Units	Business unit that is impacted by the project.
Business Capabilities	If the project is to change, enhance, or add one or more business capabilities, those capabilities can be associated with the project. Business capabilities are defined

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Field	Description
	in the Application Portfolio Management module.
Business Applications	If the project is to change, enhance, or add one or more business applications, those applications can be associated with the project. Business applications are defined in the Application Portfolio Management module. You can select any business application in your enterprise regardless of whether it is related to the capability selected in the **Business Capabilities** field.

Note:
When a demand gets converted into a project, the data on **Business Case** tab gets carried forward from demand to project.

Business case section of the Project form

Field	Description
Strategies	Strategic objectives of the organization that the project fulfills. A project can fulfill multiple strategic objectives. If a **Business Unit** for the project is selected in **Details** tab, then the list displays the business strategies for the selected business unit along with other enterprise strategies.
Goals	Goals associated with the selected strategy. A project can fulfill multiple goals. If a strategy is not selected, then all goals are displayed in the list.
Business case	Business arguments that support the project.
Risk of performing	Risks associated if the project is carried out.
Risk of not performing	Risks associated if the project is not carried out, for example, risk of loss of opportunity.
Enablers	Key enablers for the project.
Barriers	Major barriers to the project.
In scope	Scope of the project. The scope is the set of boundaries that define the extent of a project.
Out of scope	Activities or deliverables that are not in the scope of the project. Anything that is not defined in the scope is out of scope.
Assumptions	Assumptions made for the project. Assumptions help define scope and risks, and fine-tune the estimates for time and cost.

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Financials section of the Project form

Field	Description
Rate Model	Rate model assigned to the project. The rate model is used to derive hourly rates for the associated resource plans and time cards. When you create a project from a demand, the rate model is copied from the demand to the project. The subprojects in a project derive their resource plan calculations from the rate model associated with the top task. If the assigned rate model is removed or replaced or the hourly rates in the rate model are changed, the cost fields on the associated resource plans are not recalculated automatically. You must update costs of all resource plans in the project using the **Recalculate Resource Costs** menu option to reflect new rates from the rate model. You can also update costs of a single resource plan one at a time.
Total planned cost	Estimated cost of the project. If an operational expenditure, capital expenditure, or both are associated with the project, then the planned cost is the sum of the operational expenditure and capital expenditure, which is in the selected currency for the project. For Agile and Hybrid projects, the planned cost for stories is considered when the resource plan is created for Agile assignment group. **Note:** To create a resource plan for Agile assignment group, you must assign the pps_resource role to the group.
Planned capital	Capital expenditure (Capex) for the project. If no cost plans are associated with the project, the **Planned capital** field is editable. Select a currency type and enter a value.
Planned operating	Operational expenditure (Opex) for the project. If no cost plans are associated with the project, the **Planned operating** field is

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Field	Description
	editable. Select a currency type and enter a value.
Budget cost	Budgeted cost for this project. This field is automatically populated from the project budget breakdowns in the cost plan breakdown table. When project funds are allocated for a fiscal year, the cost plan breakdown stores the budget allocation for each fiscal period. These amounts are rolled up and stored in the budget cost. To manually enter a value, select a currency icon and enter the value.
Actual cost	Actual cost of this project. Select a currency icon and enter a value.
Estimate at completion	Sum of all actuals for past fiscal periods added to the planned cost for future fiscal periods. **Note:** The current month is considered as a future month for EAC calculation purposes. For example, if the duration of a project is from January 01 to December 31 and you check the Estimate at Completion in the month of May, it is calculated as: `Sum of actuals from Jan to April + Sum of planned cost from May to December`.
Planned benefit	Planned benefit for the project. This value is rolled up from the benefit breakdown of the project. You can also enter the value manually. Select a currency icon and enter a value.
Planned return	The **Planned return** value is derived from the difference between the **Planned benefit** and **Planned cost** values: (The value in the **Planned benefit** field – the value in the **Planned cost** field.)
Planned ROI%	The ROI (return on investment) percentage result is calculated based on values in the **Planned return** and **Estimated cost** fields. `(Planned return/Estimated cost x 100)`

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Field	Description
Discount Rate %	Project discount rate. The discount rate is the interest rate to determine the present value of future cash flows.
Net present value	Present value of future cash based on the given annual interest rate. This value is a measure for comparing money spent today against future expected financial benefits. This information is useful when evaluating the overall investment performance. For example, at 12% discount rate, $1.00 today is worth $0.80 in two years. Therefore, expecting to receive $1.00 in two years is the same as receiving $0.80 today. Net present value (NPV) is calculated from the estimated cost per year, the planned benefit per year, and the discount rate for the project.
Internal rate of return %	Annual interest rate required to achieve an NPV of zero. Internal rate of return (IRR) helps to determine which projects can deliver a higher rate of return in terms of revenue.
Estimate to completion	Sum of all planned costs for future fiscal periods. You can define the frequency to calculate EAC and ETC values to match with the expense lines. Navigate to **System Definition** > **Scheduled Jobs**, select the **Calculate Project Completion Estimates** job, and set the frequency using the Run list. **Note:** The current month is considered as a future month for ETC calculation purposes.

Score section of the Project form

Field	Description
Risk Score	Calculated based on the project risk.
Value Score	Calculated based on the ROI% of the project.

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Field	Description
Size Score	Calculated based on the value in the **Planned Cost** field.
Score	Calculated based on the individual scores of the attributes **Risk Score**, **Value Score**, and **Size Score**, which in turn are calculated based on the risk, planning ROI%, and estimated cost attributes on a project, respectively. **Note:** ○ You can configure the formula for score calculation. ○ When a demand is converted to a project, the score calculated on the demand is carried forward to the project.

Notes section of the Project form

Field	Description
Watch list	Users who have subscribed to project notifications.
Work notes list	Users who have chosen to receive email notifications when the work notes on the project are updated.
Activity / Work notes	Information about the milestones, impediments, or changes as the project progresses. Enter the notes in the **Activity** field and click **Work notes**. The text appears in the feed.

Preferences section of the Project form

Field	Description
Allow time card reporting on	Level at which the time cards for project tasks can be created: ○ **Project only**: All time cards for the project are created at the project level only. For example, if a user is assigned to multiple tasks in a project, then the time spent on all tasks is recorded under one time card only for the project.

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Field	Description
	Note: In the Time Sheet Portal, tasks, the project are listed on the **Tasks** tab. For these tasks, the **Add to Time Sheet** and **Add selected to Time Sheet** options are not available. Only the **Quick Add** option is available. On clicking **Quick Add**, a time card is created against the top project, not against the task. ○ **Project tasks only**: Separate time cards are created corresponding to each planned task. **Note:** In the Time Sheet Portal, the **Add to Time Sheet**, **Quick Add**, and **Add selected to Time Sheet** options are not available for the project. ○ **Project and project tasks**: Time cards can be created at the project level as well as the project task level. The default value is **True**. ○ **No time reporting**: No time cards are created for the project. If the user submits the time card manually, the business rules prevent the user from submitting the time card. **Note:** In the Time Sheet Portal, the **Add to Time Sheet**, **Quick Add**, and **Add selected to Time Sheet** options are not available for both project and project tasks.
Update actual effort from time card	Determines whether the **Actual effort** field on the **Dates** tab should be updated based on the hours entered in the time cards for the project. If the field is set to **Yes**, then the **Actual effort** field is not editable. If it is set to **No**, then the actual hours from time cards are not rolled up to the project and task. By default, the field is set to **No**.
Calculation	Type of calculation to use for task dependencies:

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Field	Description
	○ **Manual**: Task dates do not reflect any changes made to dependencies. ○ **Automatic**: Task dates are automatically updated to reflect any changes made to dependent or child tasks.
Show on Program Status Report	Option to specify whether the project and its key aspects such as cost, resource, scope, and schedule should be included in the status report of the program to which the project belongs. Default: Selected
Constraint date	A read-only field that displays the project's planned start date. The date in this field is used for calculate the start date of the tasks with **Start ASAP** constraint. Use the **Move Project** related link to change the constraint date. Changing this date also changes the start date for all the tasks with **Start ASAP** constraint. For more information, see Change the planned start date of a project.
Derive assignee list from resource plan	Option to constrain the resources in the **Assigned to** and **Additional assignee list** fields on the project and project task forms to be derived only from the associated allocated resource plans.
Recalculate score on project change	Determines whether to recalculate and update the project score. ○ If the value of the field is set to **Yes**, the project score is recalculated when the projects planned ROI%, estimated cost, or risk is modified. ○ If the value of the field is set to **No**, the project score remains the same even if the project's planned ROI%, estimated cost, or risk is modified. The value of the field can be set to **No** when the user wants to preserve the score value while converting the project to a demand.
Project schedule date format	Determines whether the dates in the planning console should be displayed with the time component. The default is **Date**.
Derive time component from planned dates	Determines whether the time component in the actual start and end dates should be copied from the time component in the planned start and end dates. By default, it is set to **True**.

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Field	Description
	If the **Project schedule date format** field is set to **Date**, this option is selected and inactivated. **Note:** When you change the **State** or **Percent complete** value for the project, the actual dates are auto-populated with the time component copied from the planned dates. The value of the **Derive time component from planned dates** field has no effect on the time component of the actual dates in this case. The value of the field affects the time component only when you populate the actual dates manually.

Note:
This tab appears only when only when you have the Advanced Risk plugin activated and the *`Enable Advanced Risk PPM Integration`* property under **Advanced Risk Assessment** > **Administration** > **Properties** is enabled.

Risk Overview section of the Project form

Field	Description
Inherent risk	Score of inherent risk automatically calculated from risk assessment.
Residual risk	Score of residual risk automatically calculated from risk assessment.
Inherent Heatmap	Heatmap of the inherent risks.
Residual Heatmap	Heatmap of the residual risks.

3. Click **Submit**.

What to do next
Use the information provided in the following related links and related lists to capture the important aspects of the project and complete the project record.

Project form Related links

Field	Description
Agile Planning & Tracking	Opens the **Backlog** tab of the Agile Board for an Agile project. For more information about backlogs, see Manage your product backlog. This related link appears only when the value for the Execution Type field is set to **Agile** and the Agile Development 2.0 plugin is installed.

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Project form Related links (continued)

Field	Description
Calculate Completion Estimates	Recalculates the values in the **Estimate at Completion** field of the project.
Create Agile Phase	Creates an agile phase for the project. The Agile phase is a child task of the project. This related link appears only when the value for the **Execution Type** field is set to **Agile** and the Agile Development 2.0 plugin is installed. **Note:** An agile phase includes stories in the Stories related list. You can create an Agile phase from either the Agile or Hybrid execution type. You can also add external dependencies.
Create Test Phase	Creates a test phase for the project. A test phase includes test cases in the Test Cases related list. This related link appears only when the value for the **Execution Type** field is set to **Waterfall** or **Hybrid** and the Test Management plugin is installed.
Planning Console	Opens the Project Planning console.
Recalculate Strategy and Goal Allocation	Recalculate and update cost field values on the **Strategy** and **Goal Allocation** tabs. Use this link to update the project's total cost and benefits when strategy and goal allocations for the project are changed. For more information, see Strategic Spend Tracking for PPM. **Note:** This related link is available only if the Strategic Spend Tracking for PPM is installed. You must switch to the Strategic Alignment view to see this related link. If this related link is not available on the form view that you're using, ask your administrator to configure the project form to add this related link.
View RIDAC	View the Risks, Issues, Decisions, Actions, and Request Changes (RIDAC) entries for the project. For more information, see RIDAC records for a project in Project Workspace. **Note:** This link only displays converted RIDAC entities. For example, Risks converted to Issues, Decisions, Actions, and Request Changes.
Project Budget	Option to allocate the budget to the project.
Project Workbench	Opens the Project workbench.
Status Report	Opens the **Status Report** tab on the Planning Console.
Create Baseline	Creates a schedule and financial baseline based on your selection.

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Project form Related links (continued)

Field	Description
Apply Template	Apply one or multiple project templates to the project.
Save as New Template	Saves the current project details such as project tasks and subtasks, attachments, checklists, and other project information as a template. You can create a new project from the templates or apply the template to an existing project. For more information, see Project templates.
Project Diagnostics	Detects data corruption in the current project. You can check for data related to tasks and invalid or cyclic relations in a project. For more information about project diagnostics, see Use Project Diagnostics to detect corrupt project data.

Project form Related lists

Field	Description
Project Tasks	Tasks in the current project. Only the next-level tasks (immediate subtasks) appear in this related list. If any external dependencies are created for the project, the corresponding shadow tasks are also listed.
Agile Phase	Lists the agile phases for the project. An agile phase contains project tasks and stories associated with these project tasks. This related list appears only when the value for the **Execution Type** field is set to **Agile** and the Agile Development 2.0 plugin is installed.
Sub-projects	Child project records of the current project.
Stories	List of stories in the current project. Click **New** to create and add new stories to the project. Click **Add Existing** to add stories from the Stories module of the Agile application. For more information, see Create stories. This related list appears only when the value for the **Execution Type** field is set to **Agile** and the Agile Development 2.0 plugin is installed.
Epics	List of epics in the current project. This related list appears only when the value for the **Execution Type** field is selected as **Agile** and the Agile Development 2.0 plugin is installed.
Requirements	Lists the project requirements with their status. To create a new requirement, click **New**.

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Project form Related lists (continued)

Field	Description
	To add an existing requirement to the project, click **Edit**.
Resource Plan	Lists the resource plans of the project and project tasks. To create a resource plan and manage existing resource plans, click **Manage**.
Cost Plans	Lists the cost plans included in the project. To create a new cost plan, click **New**.
Benefit Plans	Lists the benefit plans included in the project. To create a new benefit plan, click **New**.
Project Budget	Lists the project budget by fiscal year. Click the amounts in the list to revise them.
Baselines	Collection of all planned dates for all tasks and milestones at the time that you create the baseline.
Status Reports	Lists the status reports for the project. To generate a new status report, click **New**. See, Create a project status report.
Risks	Lists the risks that are part of the project. To create a new risk, click **New**. For more information, see Add risks for a project. Alternatively, you can select risks from an existing risk library by clicking **Create From Library**. **Note:** The option **Create From Library** appears only when you have the Advanced Risk plugin activated and the *`Enable Advanced Risk PPM Integration`* property under **Advanced Risk Assessment** > **Administration** > **Properties** is enabled. **Note:** If the project is a part of another program or portfolio, then any risk added to the project also gets added to the parent program and portfolio.
Issues	Lists the issues included in the programs. To create a new issue, click **New**. For more information, see Add issues for a project.

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Project form Related lists (continued)

Field	Description
	Project issues are added with the program and the primary portfolio.
Decisions	Lists the decisions for the current project. To create a new decision, click **New**. For more information, see Add decisions for a project.
Actions	Lists the action items identified for the project. To create a new action, click **New**. For more information, see Add actions for a project.
Request Changes	Lists the changes that are related to the resource, scope, cost, and schedule for the current project. To create a new project change request, click **New**. For more information, see Create a request change.
Stakeholders	Lists the stakeholders for the project. To add a stakeholder to the project, click **Edit**. **Note:** • When you create a project from a demand, the stakeholders are transferred from the demand to the project. • If the portfolio associated with the project has stakeholders, the portfolio stakeholders are automatically added to the project. To add a new stakeholder in the stakeholder registry, click **New**.
Time Cards	Lists the time cards submitted against the project. To create a new time card, click **New**.
Expense Lines	Lists the expense lines of the project. To create a new expense line, click **New**. For more information, see Create an expense line.
Notifications	Lists the external dependency related notifications raised in the successor project. The notifications are triggered as a result of the changes made in the predecessor project.

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Project form Related lists (continued)

Field	Description
Strategy Allocations	Lists the percentage of the project's total cost and benefits allocated toward achievement of strategies associated with the project. For more information, see Allocate or modify the strategy and goal percentage for a project. **Note:** This related list appears only when Strategic Spend Tracking for PPM is installed. This application is available on ServiceNow Store. You must switch to the Strategic Alignment view to see this related list. If this related list is not available on the form view that you're using, ask your administrator to configure the project form to add this related list. For more information, see Install Strategic Spend Tracking for PPM.
Goal Allocations	Lists the percentage of project's total cost and benefits allocated towards achievement of goals associated with the project. For more information, see Allocate or modify the strategy and goal percentage for a project. **Note:** This related list appears only when Strategic Spend Tracking for PPM is installed. This application is available on ServiceNow Store. You must switch to the Strategic Alignment view to see this related list. If this related list is not available on the form view that you're using, ask your administrator to configure the project form to add this related list. For more information, see Install Strategic Spend Tracking for PPM.

Related topics

Project Portfolio Management

Resource Management classic

Create and manage waterfall projects

An overview of the tasks involved in creating a waterfall project.

The following tables, arranged by task group, list the tasks involved in creating a waterfall project.

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Create a new project

Task	How do I do this?
Create a new project	• Navigate to **Project** > **Projects** > **Create New**. • Navigate to **Project** > **Projects** > **Workbench** and click **New Project**.

Open an existing project

Task	How do I do this?
Open a project in the project workbench	• Click the **Project Workbench** related link on the Project form. • Navigate to **ProjectProjectsWorkbench** and select the project from the **Select Projects** choice list in the workbench header.

Add phases to a project from the project workbench

Task	How do I do this?
Create a waterfall phase for a project	Click the Add phase icon (+) and select **Waterfall** from the Phase Type choice list.
Create a test phase for a project	Click the Add phase icon (+) and select **Test** from the Phase Type choice list.

Edit a project phase from the project workbench

Task	How do I do this?
Edit a waterfall phase for a project	Click the Edit phase icon ( ) on a project phase and make the required changes in the details of the project phase.
Edit a test phase for a project	Click the Edit phase icon ( ) on the test phase and make the required changes in the details of the test phase.

Add milestones to a project from the project workbench

Task	How do I do this?
Add milestones to a project	Click the Add phase icon (+) and then click **Milestone** at the top of the Add Phase pop-up window.

Set up manual testing

Task	How do I do this?
Create a test plan	Navigate to **Test Management** > **Test Execution** > **Test Plans** > **New**.

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Set up manual testing (continued)

Task	How do I do this?
Add test cases to a test plan	Click the **Add Test Cases from Test Suite** related link on the Test Plan form.
Create a test phase	Click the **Add Phase** button on the project workbench.
Add a test plan to a test phase	Click the Edit Phase icon ( ) for the test phase and enter the name of the **Test Plan**.
Assign test cases to testers	Select a user in the **Assigned to** field on the Test Case form.
Notify testers to start testing	Click the **Notify testers** to start testing related link on the Test Plan form.
Tester performs tests and submits results	Navigate to **Self-ServiceMy Tests** or **Self-Service** > **My Assessments**.
Monitor the testing progress	The Test Plans list, Test Plan form, and Test Case form all display results for test cases and individual tests.
Testing sign-off	Click the **Sign-off Test Plan** related link on Test Plan form.

Copy a project

Another option for creating a project is to copy an existing project with all its tasks and relationships. After you specify the start date for the copy, the system adjusts all task start and end dates automatically.

Before you begin

Role required: it_project_manager

Procedure

1. On the Project form, right-click the header and select **Copy Project**.
2. Enter the new project name for the new project that you are creating.
3. Select a start date.
4. Click **OK**.
   Copy partial project, which is available from the Project Task form, provides similar functionality. It copies all task or project relationships and children from the selected project and inserts them into the current project. In this case, a new project record is not created.

Result

Actual duration and the actual start and end dates are reset to null values. The state is set to **New** and percent complete is set to **0**.

By default only the short description, planned dates and duration fields are copied from source project to the target project. If additional columns must be copied, they should be declared in the project property **List of attributes that will be copied from the originating project task**.

Change default values of copied project

Reset or change the default values for copied fields in the new copied partial or complete project.

Before you begin

Role required: admin

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About this task

Child tasks are defined with the same relationships, each lasting for the same duration as the original tasks. All project tasks are set to **Pending**. Actual duration and the actual start and end dates are reset to null values. The state is set to **New** and percent complete is set to 0. Administrators can override the Script Include CopyProjectFieldOverride to determine which fields are reset or to change the default values.

Procedure

1. Navigate to **All** > **System UI** > **Script Include**.
2. Open the CopyProjectFieldOverride record.
3. Add the method to override the method defined in the CopyProjectFieldOverrideSNC script for resetting or defaulting the values.

   For example, to copy partial project:

```
    /* getResetFieldsForCopyPartialProject method returns the
array containing the list of names of fields that need to be
erased from the copied project tasks
                  * getDefaultObjectForCopyPartialProject
method returns the object containing the key, value pairs of
field names and values that need to be set on the copied tasks
                  */var CopyProjectFieldOverride =
Class.create();
                  CopyProjectFieldOverride.prototype =
Object.extendsObject(CopyProjectFieldOverrideSNC, {
                  getResetFieldsForCopyPartialProject:
function() {
                  return ['work_start', ‘work_end’,
‘work_duration’];
                  },
                  getDefaultObjForCopyPartialProject:
function() {
                  return {'state': -5,‘percent_complete: 0’};
               },
               type: 'CopyProjectFieldOverride'
               });
```

   To copy complete project:

```
/* getResetFieldsForCopyProject method returns the array
 containing the list of names of fields that need to be erased
 from the copied project tasks
           * getDefaultObjectForCopyProject method returns
 the object containing the key, value pairs of field names and
 values that need to be set on the copied tasks
           */var CopyProjectFieldOverride = Class.create();
           CopyProjectFieldOverride.prototype =
 Object.extendsObject(CopyProjectFieldOverrideSNC, {
           getResetFieldsForCopyProject: function() {
                  return
 ['work_start' ,"work_end","work_duration"];},
                  getDefaultObjForCopyProject: function()
                  {
                      return {'state': -5, ‘percent_complete:
 0’};
                   },
```

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```
                    type: 'CopyProjectFieldOverride'
                });
```

4. Click **Update**.

Create baseline of a project

Create a schedule baseline and financial baseline of a project. A schedule baseline captures planned dates of all tasks and milestones at a particular moment in time. A financial baseline captures benefit and financial metric information (snapshot of cost plan, benefit plan, and project-level financial metrics) at a particular moment in time.

Before you begin
Role required: it_project_manager

About this task
Schedule baseline

You can create as many schedule baselines as necessary and review the changes that have been made to the project since the previous baseline. If a project is not on schedule, you can create a schedule baseline to know how much schedule slippage has occurred. It also helps to view the real-time deviations between actual and planned values.

The baseline appears as a set of gray lines below the bars that represent the actual tasks on the Gantt chart. These baselines represent planned dates, while the task bars represent the actual dates. If the project tasks are shifted to the right of the baselines, the project is running behind schedule.

Financial baseline

You can create as many financial baselines as necessary and compare them to review the financial changes that have been made to the project since the previous baseline. Any financial baseline does not capture actual cost component of the project.

Note:
Nested projects cannot have baselines. Baselines are allowed for the top-level projects only.

Procedure

1. Navigate to **Project** > **Projects** > **All**.
2. Select the required project.
3. To create schedule and financial baselines of a project, use any of the following options.

Note:
In the Create Baseline pop-up, the **Create Schedule Baseline** and the **Create Financial Baseline** check boxes are selected by default. Clear a check box if you do not intend to create a specific baseline.

Compare financial baselines of a project

You can compare baselines to review the variances in the financial data of a project and see what changed.

Before you begin
Role required: it_project_manager

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About this task

You can create multiple baselines at various stages of a project, for example, at the end of each phase or after every calendar month or quarter. Each baseline captures the financial data of the project at a particular moment, providing a basis from which you can identify and review the changes made to the project. Having multiple baselines and comparing them helps you track the performance of your projects.

Procedure

1. To compare the financial baselines of a project, use one of the following options.

2. On the Financial Baseline form, select the baselines you want to compare from the two choice lists.
   By default, the current and the most recent baselines are selected.
3. Click **Compare**.
   The comparative data of the baselines display in the following two sections:
   - The **Financial Baseline Summary** section displays four widgets: the first two widgets contain the financial data of the two baselines, the third widget contains their variance, and the fourth widget contains the actual costs to date of the project.
   - The **Financial Baseline Details** section displays the cost plans and benefit plans of the two baselines in two different grids. Each plan type has two rows corresponding to each baseline data.

     Note:

     Click the baseline legend icon (ⓘ) to see the color code of rows representing each baseline.

4. **Optional:** Review additional fields or reorganize the comparative data on the form.
   - To show or hide additional fields on the widgets in the **Financial Baseline Summary** section, click the configuration icon (···) and select the field names.

     The selected field preferences are saved and are available when you reopen the Financial Baseline form. To reset to the default widget layout, click **Reset to defaults**.
   - To view cost plan or benefit plan comparative data in yearly, quarterly, or monthly format, click the **Year** or **Quarter** or **Month** views respectively.
   - To toggle viewing the **Financial Baseline Summary** section, click the **Collapse** icon (^) or **Expand** icon (›).

Compare schedule baselines of a project

Compare baselines to review variance between tasks and identify which task has variance from the current planned end date and the baseline end date. The baseline variance column displays the amount of variance between the two date comparisons.

Before you begin

Role required: it_project_manager

About this task

Create schedule baselines at various stages of a project, for example, at the end of each phase or after every calendar month or quarter. Each baseline captures the schedule information of project tasks at a particular moment. This snapshot provides a basis for comparison and helps

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you to identify and review the changes made to the project. Having multiple baselines and comparing them helps you track the performance of your projects.

Procedure

1. To compare the schedule baselines of a project, use one of the following options.
   The Planning Console displays the selected schedule baseline.
2. On the Planning Console, select different baselines to view schedule variance information of project tasks.
   The following columns display the baseline information:
   - **Baseline start date**: The planned start date for the task.
   - **Baseline end date**: The planned end date for the task.
   - **Baseline variance**: The difference between the baseline end date and planned end date. The value of this field column if there are any changes made to the project tasks or project. If the planned end date for a task is prior to the baseline date, the variance is shown as a negative value. For example, for a task with the planned end date of April 24 and the baseline created on April 17 means it is past due or late. The Baseline variance column in this case displays a value of -5 days.

Note:

Use the show or hide columns in gantt icon ( ) to add these columns to the Planning Console.

Assign a project schedule

Without an assigned schedule, a project calculates a day as a full 24 work hours. To schedule tasks by a more realistic work day, assign a schedule to the project. If the schedules provided in the base system do not suit your needs, define a new one.

Before you begin

Role required: it_project_manager

Procedure

1. Open a project.
2. If the **Default** view is active, right-click the header bar and select **View** > **Advanced**.
3. Select a schedule in the **Schedule** field.

Create a project cost plan

Project cost plans capture the costs of projects. Create a cost plan to specify the unit cost of a cost type for a fiscal period.

Before you begin

Role required: it_project_manager
Application required: Project Portfolio Management with Financials

About this task

The application automatically creates cost plan breakdown records when you save the cost plan. Cost plans can also have associated expense lines.

Note:

Cost plans are automatically created for resource plans that are associated to projects and project tasks.

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To use multiple currencies, create a new cost plan for another currency.

Procedure

1. Open the project form.
2. In the related links, click **Cost Plans**.
3. Click **New**.

> **Note:**
> To create a cost plan from the **Financials** tab in Project Workspace, click **Manage**.

4. On the form, fill in the fields.

Cost Plan form

Field	Description
Name	Descriptive name of the cost plan.
Project/ Demand	Project or demand to which the cost plan belongs.
Start fiscal period	Indicates the starting fiscal period. When you change the start fiscal period, the associated cost plan breakdowns also change. Start fiscal period also changes when you create cost plan breakdowns earlier than the start fiscal period.
End fiscal period	Indicates the ending fiscal period. When you change the end fiscal period, the associated cost plan breakdowns also change. End fiscal period also changes when you create cost plan breakdowns later than the end fiscal period.

Financials section of the Cost Plan form

Field	Description
Entered currency	Currency in which you want the cost plan to be created. If the selected currency is different from the functional currency, the corresponding budget reference rate is used to calculate the total planned cost, planned capital, planned operating of the project.
Unit cost	Cost of a single unit of the resource, which is in terms of entered currency.
Quantity	Quantity of the resource that is required.
Recurring	Option to indicate that the cost is recurring for each fiscal period. **Quantity** x **Unit cost** incurred for every fiscal period.

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Field	Description
Cost type	Cost type definition.
Investment	Name of the investment created for the project. This field appears only if the legacy Investment Funding (com.snc.investment_funding) plugin is activated or the Investment Funding (sn_invst_pln) application is installed.
Source type	Funding entity to associated with the project investment for funding. This field appears only if the legacy Investment Funding (com.snc.investment_funding) plugin is activated or the Investment Funding (sn_invst_pln) application is installed.
Source	Funding entity value from which you request fund. The field is available when you select a value in the **Source type** field. This field appears only if the legacy Investment Funding (com.snc.investment_funding) plugin is activated or the Investment Funding (sn_invst_pln) application is installed.
Total planned cost	Total estimated cost of the cost plan. If the cost is recurring, the calculation is **Quantity** x **Unit cost** x **number of fiscal periods**. If the cost is non-recurring, the calculation is **Quantity** x **Unit cost**.
Functional currency	Currency that is obtained from the **glide.system.locale** property. For upgraded customers, if the selected currency is different from the functional currency configured in the Financial Management application, the corresponding budget reference rate is used to calculate the total planned cost, planned capital, planned operating of the project.

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Field	Description
	Note: If budget reference rates are not defined, then exchange rate is considered as 1. For example, if functional currency is USD, entered cost is EUR, and no exchange rate is defined, then 1000 USD equals to 1000 EUR.
Cost in functional currency	Value that is rolled up from the **Functional cost** field of all cost plan breakdowns.
Total actual cost	Value that is rolled up from the **Actual cost** field of all cost plan breakdowns.
Estimate at Completion	Sum of all actuals for past fiscal periods added to the functional cost for future fiscal periods. For example, the duration of a project is from January 01 to December 31, and if you check the Estimate at Completion in the month of May, it is calculated as: `Sum of actuals from Jan to April + Sum of functional cost from May to December`.

Note:
When you change the planned start date of a project, the associated cost plans and resource plan also change. The project property **Change Resource Plan and Cost Plan Start Date with Demand or Project Start Date Change** controls the behavior for project start date change.

5. Click **Submit**.

What to do next

To recalculate the values in the **Estimate at Completion** field, use the **Calculate Estimate at Completion** related link. To view the cost plan breakdowns, click the **Cost Plan Breakdowns** related list.

Cost plan breakdown

A cost plan breakdown captures the estimated cost and actual cost for every fiscal period. Cost plan, project, demand, program, and portfolio are the breakdowns types that are available.

Requirement

Requirement corresponds to a single cost plan. For example, for a regular calendar and a cost plan spanning across one year, 12 breakdowns would appear.

Task

Task corresponds to a project or a demand. The cost across all the cost plans per period is rolled up to the project or demand level. These records have breakdown type set to **Task**. There would be only one record of type **Task** per period. The number of records of type **Task** that are created depends on the duration of the project or demand, and the requirements planned in the project or demand. For

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example, for a regular calendar and a project with three cost plans, 12 breakdowns appear.

Program

If a project or a demand is part of a program, the breakdown type of **Program** provides the aggregate of program level costs per period.

Portfolio

If a project or a demand is part of a portfolio, the breakdown type of **Portfolio** provides the aggregate of portfolio level costs per period.

Update a cost plan breakdown

Update a cost plan breakdown record that specifies the estimated and actual cost, at a granular level, for specific fiscal periods.

Before you begin

Role required: it_project_manager

Procedure

1. Open the required project.
2. Click the **Cost Plan** related list.
3. Click the **Cost Plan Breakdowns** related list.
4. Click the **i** icon against a cost plan breakdown.
5. Click **Open Record**.
6. In the Cost Plan Breakdown form, view and update the enabled fields.

System-generated cost plans

When an expense line is created without populating the **Cost Plan** field, system-generated cost plans are created automatically.

The orphan expense lines are associated to the system-generated cost plans. This association ensures that the project actuals shown on the widgets or the total actuals are the same as the aggregate of the cost plan actuals on the grid shown on the Project Financials page and Investment Portal.

Note:
System-generated cost plans are created only when the project has a minimum of one cost plan.

System-generated cost plans are created for any of the following reasons:

- When you create an expense line without populating the **Cost Plan** field.
- When you create a time card and approve it.

There are two system-generated cost plans, CapEx and OpEx. Depending on the type of expense selected while creating an expense line, the type of system-generated cost plan is created. The following are the name formats for the system-generated cost plans:

- <project number> System generated CapEx costplan
- <project number> System generated OpEx costplan

When you create a time card and approve it, an expense line of type CapEx is created and then the orphan expense line is associated to the system-generated cost plan of type CapEx.

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The system-generated cost plans are created to ensure that none of the expense lines are left without being associated to a cost plan. The system-generated cost plans are read-only.

For customers upgrading to Xanadu, you can run the project diagnostics, **Associate orphan expense lines to the system generated cost plan**, to associate orphan expense lines to a system-generated cost plan. The diagnostic scan lists the expense lines that are not associated to any cost plan. When you run the fix script, system-generated cost plans are created, and the orphan expense lines are associated to the system-generated cost plans.

Create a monetary benefit plan for a project

Project benefit plans capture the potential benefits accrued by the project when the project is executed. Create a monetary benefit plan to specify the estimated benefit in a category spanning one or more fiscal periods.

Before you begin

Role required: it_project_manager

About this task

The monetary benefit plan breakdown records are automatically created when you save the benefit plan.

Procedure

1. Navigate to **Project** > **Projects** > **All**.
2. Open the required project.
3. In the **Monetary Benefit Plans** related list, click **New**.

> **Note:**
> To create a monetary benefit plan from the **Financials** tab in Project Workspace, click **Manage**.

4. On the form, fill in the fields.

Benefit Plan form

Field	Description
Name	Descriptive name of the benefit plan.
Work	Project or demand to which the benefit plan belongs.
Sponsor	Sponsor for the project.
Category	Type of benefit: ○ **Hard**: Benefits that can be measured in terms of revenue. ○ **Soft**: Benefits that are measured in terms of value.
Sub category	Sub-categories of hard and soft benefits. The selection in **Category** field determines the selections available in this field.
Benefit type	Type of benefit. Select **Monetary benefits**.
Offset type	Field to indicate when the benefits start realizing. Select any of the following options:

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Field	Description
	○ **None**: The default value is None. When you select None, you need to manually enter the benefit plan start and end fiscal periods. ○ **Milestone**: After completion of a milestone. ○ **Start Date**: At the start of the project. ○ **End Date**: After the project ends. If the value in the selected offset type changes, the benefit plan start date shifts accordingly. For example, if the offset type is set to **End Date** and the end date of the project changes, the benefit plan start date shifts to align with the new end date of the project.
Milestone	**Note:** The field appears if you select **Milestone** in the **Offset type** field. Project milestones to which the benefit plan belongs.
Milestone start date	**Note:** The field appears if you select **Milestone** in the **Offset type** field. Start date of the selected milestone.
Work start date	**Note:** The field appears if you select **Start Date** in the **Offset type** field. Start date of the project or demand.
Work end date	**Note:** The field appears if you select **End Date** in the **Offset type** field. End date of the project or demand.
Offset	Number of periods before or after the offset type when the benefit plan starts. For example, if the offset type is selected as **End Date** and the offset is -2, the benefit plan is two periods prior to the project end date. If the project end date shifts, the benefit plan start date shifts to two periods prior to the new project due date.
Duration in periods	The length, in periods, of the benefit plan.
Start fiscal period	Starting fiscal period. Populated based on the value in the Offset field relative to the selected Milestone, Project or Demand start date, or Project or Demand end date, and Duration in period values. The field is editable if you select **None** in the **Offset type** field. When you change the start fiscal period, the associated benefit breakdown values also change.
End fiscal period	Ending fiscal period. Populated based on the value in the Offset field relative to the selected Milestone, Project or Demand start date, or Project or Demand end date, and Duration in period values. The field is editable if you select **None** in the **Offset type** field.

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Field	Description
	When you change the end fiscal period, the associated benefit breakdown values also change.
Associated benefit	Non-monetary benefit that is associated to this monetary benefit plan.

Financials details

Field	Description
Entered benefit	Benefit incurred from the project or demand specified in terms of entered currency. If the selected currency is different from the functional currency, the corresponding budget reference rate is used to calculate the **Total planned benefit** of the project.
Entered currency	Currency in which you want the benefit plan to be created.
Functional currency	Currency that is obtained from the **glide.system.locale** property. For upgraded customers, if the selected currency is different from the functional currency configured in the Financial Management application, the corresponding budget reference rate is used to calculate the **Total planned benefit** of the project.
Total planned benefit	Estimated amount of potential benefit of the project or demand.
Benefit in functional currency	Benefit incurred from project or demand in terms of functional currency.
Actual benefit	Actual benefit that is incurred from the project or demand. This value is rolled up from the **Actual benefit** field of all the benefit plan breakdowns.
Recurring	Check box to indicate that the benefit is recurring for all the fiscal periods in the benefit plan.

Note:
When you move the project or the milestone date, the associated benefit plans also change accordingly based on whether the benefit plan is tied to the project start date, end date, or one of the project milestones. The project property **Change Resource Plan, Cost Plan and Benefit Plan Start Date with Demand or Project Start Date Change** controls the behavior for project date changes.

5. Click **Submit**.

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What to do next
On the Benefit Plan form, view the benefit breakdown by fiscal period in the Monetary Benefit Plan Breakdowns related list.

Update a monetary benefit plan breakdown for a project

Update a monetary benefit plan breakdown record that specifies the estimated and actual benefits, at a granular level, for specific fiscal periods.

Before you begin
Role required: it_project_manager

Procedure
1. Navigate to **Project** > **Projects** > **All**.
2. Open the required project.
3. Click the Monetary Benefit Plans related list.
4. Open the required monetary benefit plan.
5. In the Monetary Benefit Plan Breakdowns related list, click the information icon (ⓘ) for a monetary benefit plan breakdown.
6. Click **Open Record**.
7. On the Monetary Benefit Plan Breakdown form, view and update the enabled fields.
8. Click **Update**.

Note:
Changing benefit plan start and end date is not possible if the recorded actual benefits are outside of the date range.

Create a non-monetary benefit plan for a project

Create a non-monetary benefit plan to specify the estimated benefit in a category spanning one or more fiscal periods. Project benefit plans capture the potential non-financial benefits accrued by the project when the project is executed.

Before you begin
Role required: it_project_manager

About this task
The non-monetary benefit plan breakdown records are automatically created when you save the benefit plan by selecting **Automatic** or **Manual** in the **Breakdown Type** field. The non-monetary benefit plan breakdown records specify the estimated and actual non-financial benefits at a granular level for specific fiscal periods, such as FY16: April and FY16: May. The Non-monetary Benefit Plan Breakdowns related list shows the aggregated benefits for estimated and actual non-financial benefits for each fiscal period for the project.

Procedure
1. Navigate to **Project** > **Projects** > **All**.
2. Open the required project.
3. Click the Non-monetary Benefit Plans related list.
4. To create a non-monetary benefit plan, click **New**.
5. On the form, fill in the fields.

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Benefit Plan form

Field	Description
Name	Descriptive name of the benefit plan.
Work	Project or demand to which the benefit plan belongs.
Sponsor	Sponsor for the project.
Category	Type of benefit: ○ **Hard**: Benefits that can be measured in terms of revenue. ○ **Soft**: Benefits that are measured in terms of value.
Sub category	Subcategories of hard and soft benefits. The selection in the **Category** field determines the selections available in this field.
Benefit type	Type of benefit. Select **Non-monetary benefits**.
Offset type	Field to indicate when the benefits start to be realized. Select any of the following options: ○ **None**: The default value is None. When you select **None**, you must manually enter the benefit plan start and end fiscal periods. ○ **Milestone**: After completion of a milestone. ○ **Start Date**: At the start of the project. ○ **End Date**: After the project ends. If the value in the selected **Offset type** field changes, the benefit plan start date shifts accordingly. For example, if the **Offset type** field is set to **End Date** and the end date of the project changes, the benefit plan start date shifts to align with the new end date of the project.
Milestone	Project milestones to which the benefit plan belongs. This field appears only when **Milestone** is selected from the **Offset type** field.
Milestone start date	Start date of the selected milestone. This field appears only when **Milestone** is selected from the **Offset type** field.
Work start date	Start date of the project or demand. This field appears only when **Start Date** is selected from the **Offset type** field.
Work end date	End date of the project or demand. This field appears only when **End Date** is selected from the **Offset type** field.
Offset	Number of periods before or after the offset type when the benefit plan starts. For example, if the offset type is selected as **End Date** and the offset is -2, the benefit plan is two periods prior to the project end date. If the project end date shifts, the benefit plan start date shifts to two periods prior to the new project due date.
Duration in periods	The length, in periods, of the benefit plan.
Start fiscal period	Starting fiscal period. Populated based on the value in the **Offset** field relative to the selected **Milestone**, **Project/Demand start date**, or **Project/Demand end date**, and **Duration in periods** field values.

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Field	Description
	The field is editable if you select **None** in the **Offset type** field. When you change the start fiscal period, the associated benefit breakdown values also change.
End fiscal period	Ending fiscal period. Populated based on the value in the Offset field relative to the selected Milestone, Project or Demand start date, or Project or Demand end date, and Duration in period values. The field is editable if you select **None** in the **Offset type** field. When you change the end fiscal period, the associated benefit breakdown values also change.
Associated benefit	Monetary benefit that is associated to this non-monetary benefit plan.

Non-monetary Details

Measure	Type of measure for the non-monetary benefit plan. The measure types are Count, Percentage, Hours, Days, and Score. Select the option **Yes/No** to track the benefits that are not quantifiable. When this option is selected, the only field available is **Benefits achieved**. You can select the check box to indicate that the benefits have been achieved.
Non-monetary entered benefit	Estimated value of the potential benefit. Any change in the planned benefit on the benefit plan updates the associated benefit breakdown values for future fiscal periods only.
Non-monetary planned benefit	Benefit value that is rolled up from the benefit breakdown.
Benefits achieved	Option to indicate if the benefit is achieved.
Breakdown type	Type of breakdown creation when you save the benefit plan. ○ **None**: No breakdowns are created. ○ **Automatic**: A Non-monetary Benefit Plan Breakdowns record is created automatically with data. The breakdown is calculated linearly. ○ **Manual**: A Non-monetary Benefit Plan Breakdown record is created automatically but without data in the **Entered benefit** column.

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Aggregation mode	Determines how the roll-up happens from breakdowns to the benefit plan and updates the values in the **Non-monetary planned benefit** and **Non-monetary actual benefit** fields. ○ **Sum**: Aggregates data from all breakdowns. ○ **Average**: Average value from all breakdowns. ○ **Most recent**: Recent breakdown value. ○ **Max**: Maximum value among the breakdowns. ○ **Min**: Minimum value among the breakdowns.
Non-monetary actual benefit	Actual benefit value that is rolled up from the actual benefit in the non-monetary benefit plan breakdown.

Note:
When you move the project or the milestone date, the associated benefit plans also change accordingly based on whether the benefit plan is tied to the project start date, end date, or one of the project milestones. The project property **Change Resource Plan, Cost Plan and Benefit Plan Start Date with Demand or Project Start Date Change** controls the behavior for project date changes.

6. Click **Submit**.

What to do next

- On the Benefit Plan form, view the benefit breakdown by fiscal period in the Non-monetary Benefit Plan Breakdowns related list.
- Associate monetary and non-monetary benefit plans, so that you can capture the potential benefits (financial and non-financial) accrued by the project for the hybrid benefit plans.

Update a non-monetary benefit plan breakdown for a project

Update a non-monetary benefit plan breakdown record that specifies the estimated and actual benefits, at a granular level, for specific fiscal periods.

Before you begin
Role required: it_project_manager

Procedure

1. Navigate to **Project** > **Projects** > **All**.
2. Open the required project.
3. Click the Non-monetary Benefit Plans related list.
4. Open the required non-monetary benefit plan.
5. In the Non-monetary Benefit Plan Breakdowns related list, click the information icon (ⓘ) for a non-monetary benefit plan breakdown.
6. Click **Open Record**.

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7. On the Non-monetary Benefit Plan Breakdown form, view and update the enabled fields.

8. Click **Update**.

Associate monetary and non-monetary benefit plans

Associate monetary and non-monetary benefit plans, so that you can capture the potential benefits (financial and non-financial) accrued by the project for the hybrid benefit plans.

Before you begin
Role required: it_project_manager

About this task
You can associate a monetary benefit plan with a non-monetary benefit plan and vice versa.

Note:
When you delete a benefit plan, its relationship with the associated benefit plan (if any) is also removed.

Procedure

1. Navigate to **Project** > **Projects** > **All**.
2. Open the required project form.
3. Click the Monetary Benefit Plans or Non-monetary Benefit Plans related list.
4. Click the information icon (ⓘ) for a benefit plan that you want to associate.
5. Click **Open Record**.
6. Associate a monetary or non-monetary benefit plan.

7. Click **Save**.

Result
The selected benefit plan is associated with another plan.

What to do next
Click the **View Associated benefit plan** related link to view the associated benefit plan.

Project and portfolio funding

Specify the amount of money that projects and portfolios are allowed to have.

You can fund projects and portfolios when you activate PPM Standard with Financials.

The funding process follows these steps:

1. Identify the costs for time, such as a financial year, by creating cost plans at the project or demand level. These costs roll up to the portfolio Cost Plans related list. Cost plans automatically include cost plan breakdowns for each fiscal period. See Create a project cost plan and Create a demand cost plan.
2. Enter the target cost values for operational and capital expenses for the portfolio. See Create a portfolio and .
3. Create budget plans for the projects in your portfolio and promote the plans to forecasts. See and Promote a budget plan.

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Create an expense line

A project expense line is cost associated with a specific source, such as a user, fixed asset, or a CI. Expense lines are part of project cost plans.

Before you begin

Role required: it_project_manager
Application required: Project Portfolio Management with Financials

About this task

Only processed expense lines are considered for projects, project tasks, and demands. You can create multiple expense lines for a project or demand.

Procedure

1. Open the project form.
2. In the related lists, click **Cost Plans**.
3. Right-click on a cost plan.
4. Click **Create Expense Line**.
5. Fill out the expense line form (see table).
6. Click **Submit**.

Expense line form fields

Field	Description
Number	Auto generated number.
Amount	Select a currency type and enter the expense cost.
Date	Date of the expense generated.
Process date	Date on which the expense line was processed.
Source ID	Record that generated the associated cost.
State	State of the expense line. The state can be Pending or Processed. The cost roll-up happens only if the expense line is processed.
Cost plan	Name of the cost plan against which you want to create the expense line.
Summary type	Select the category you want to group the expense under.
Cost type	Select the cost type.
Expense type	Select **Capex** for a capital expense or **Opex** for an operating expense.
Short description	Enter a short description of the expense type.
Sources	Select the records for the sources of the expense line. These sources include: ○ **Assets** ○ **Fixed assets** ○ **Contracts** ○ **Users**

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Field	Description
	○ **Configuration items** ○ **Tasks** ○ **Cost centers**

Note:

- Imported processed expense lines are not rolled up to the Total actual cost field in Cost Plans.
- If you change the **Amount** of a Pending expense line and change the state to Processed, the latest value is captured in expense line and the same is rolled up to Total actual costs in Cost Plans.

Result

Once the expense line is processed, the actual amount incurred becomes part of the cost plan. The actual amount spent is recorded against the project cost plan under the appropriate expense type: **Capex** or **Opex**. Not providing a cost plan reference when creating an expense line, the actual cost is recorded at the project level in the cost plan related list.

If you create an expense line without populating the **Cost Plan** field, a system-generated cost plans is created.

Generate labor costs

Generate labor costs based on the planning attributes configured for financials in the planning attributes page for the resource assignments in a project.

Before you begin

- Review the planning attributes enabled for financials. For more information, see Planning attributes.
- Role required: it_project_manager

Procedure

1. Navigate to **All** > **Project** > **Projects** > **All** and select the required project.
   Make sure that the resource assignments are finalized to generate cost plans. If there are no resource assignments for the project, migrate the resource plans to resource assignments. For more information, see Migrate resource plans and cost plans for projects and demands.
2. Generate labor costs using one of the following options.
3. Refresh the browser page to view attribute-based labor costs in the Cost Plans related list.

Result

Attribute-based labor costs are created for the unique combination of attributes that are reflected as the name of the cost plans.

Activate a scheduled job to generate labor costs

Activate and trigger a scheduled job to generate attribute-based labor costs for all the projects and demands at a required cadence.

Before you begin

Role required: admin

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Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Open the **Generate labor costs for demands and projects** scheduled job.
3. Select **Active** and on the Scheduled Script Execution form, fill the fields.
   For a description of the field names, see Scheduled Script Execution Form.
4. Select **Update**.

Scheduled Script Execution Form

Use the Scheduled Script Execution form to define a scheduled job.

Schedule Item form

Field	Description
Name	Name that identifies this scheduled job.
Active	Option that indicates that scheduled job is active and should be executed at the specified date and time.
Run	Time interval to use for running the scheduled job: • **Daily**: Runs daily, at a designated time. • **Weekly**: Runs on a weekly basis, at a designated time and day of the week. • **Monthly**: Runs on a monthly basis, at a designated time and day of the month. • **Periodically**: Runs on a designated repeating interval. • **Once**: Runs for a single occurrence only. • **On Demand**: Runs immediately on demand. • **Business Calendar: Entry Start**: Runs on the starting entry dates for the business calendar that you select in the **Business Calendar** field. A scheduled job runs for the starting date of each of the business entries that you defined for the business calendar. For example, if the business calendar represents a fiscal year, and the starting date of each entry is a fiscal month, the scheduled job runs on the first day of each month. • **Business Calendar: Entry End**: Runs for the ending date for the business calendar that you select in the **Business Calendar** field. This selection runs in the same manner as **Business Calendar: Entry Start**, but for the end dates of the associated business calendar entries. **Note:** When you select **Business Calendar: Entry Start** or **Business Calendar: Entry End**, you can apply an offset factor to schedule the job to run before or after the time span of the selected business calendar. To learn more, see the **Offset type** and **Offset** fields. To learn more about creating and using business calendars and defining business calendar entries, see Creating business calendars and Define business calendar entries.

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Schedule Item form (continued)

Field	Description
Time zone	Time zone to use with the **Time** field entry when you specify the time at which the scheduled job should run. Select a time zone entry: • **-None-**: Use the default time zone for the logged-in user who is creating the scheduled job. For example, the scheduled job runs at 04:45 p.m. US/Pacific time if it is the user's assigned time zone, and you enter `16 : 45` into the **Time** field. • **Use System Time Zone**: Use the default system time zone that is specified for the instance in which it runs. For example, the scheduled job runs at 10:15 p.m. London time if Europe/London is the default system time zone for the instance, and you enter `22 : 15` in the **Time** field. • Actual time zone. For example, the scheduled job runs at 1:30 p.m. in the US Eastern time zone if you select **US/Eastern**, and enter `13 : 30` in the **Time** field.
Day	Day on which the scheduled job should run. • If **Run** is set to **Weekly**, select the day of the week. For example, select Wednesday. • If **Run** is set to **Monthly**, select the day of the month. For example, select 25 for the 25th day of the month. This field appears only if you select **Monthly** or **Weekly** in the **Run** field.
Repeat Interval	Duration of the repeat interval for each scheduled job execution. Enter the duration in the number of days, hours, or minutes. For example: • To run the scheduled job every four days, enter `04` in the **Days** field. • To run it every 26 hours, enter `26` in the **Hours** field. • If it should repeat at an interval of 13:30:25, enter `13` in the **Hours** field, and then enter `30` and `25` in the two unlabeled fields after it. These fields appear only if you select **Periodically** in the **Run** field. **Note:** This setting does not account for Daylight Saving Time changes. For example, if you select a period of one day, the calculation adds 24 hours to the starting time of the job. If the start time is in a Daylight Saving Time (DST) period, the job runs with a one-hour offset when that time zone is not in DST.
Business Calendar	Business calendar entry that you are using to determine the business calendar start or end date for the scheduled job. This field appears only if you select **Business Entry: Start Date** or **Business Entry: End Date** in the **Time** field.

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Schedule Item form (continued)

Field	Description
Offset Type	Type of time offset, if any, to apply to the business calendar that you selected for scheduling this job: • **Past**: Apply an offset factor to schedule the job to run before the start of the time span of the selected business calendar. • **Future**: Apply an offset factor to schedule the job to run after the end of the time span of the selected business calendar. • **--None--**: Do not apply a time offset when scheduling this job. Adding an offset factor enables you to schedule the job to run before, or after, the formal time span that is defined in the business calendar for the following use cases: • Schedule a job at a certain time, outside of the time span for the selected business calendar. • Arrange multiple jobs to run in sequence, around the time span of the selected business calendar. The **Offset type** and **Offset** fields appear only if you select **Business Calendar: Entry Start** or **Business Calendar: Entry End** in the **Run** field.
Offset	Amount of time offset, expressed in days, hours, minutes, and seconds, to apply to the business calendar that you selected for scheduling this job. For example, if you want to schedule the job to start three days, 14 hours, 10 minutes, and 45 seconds before the business calendar start date, do the following actions: • Select **Past** in the **Offset type** field. • Enter **3** in the **Days** field. • Enter **14**, **10**, and **45** in the **Hours** field. The **Offset Days** and **Hours** fields appear only if you select **Business Calendar: Entry Start** or **Business Calendar: Entry End** in the **Run** field, and **Past** or **Future** in the **Offset type** field.
Time	Time of day at which the scheduled job should run, expressed in hours, minutes, and seconds on a 24-hour clock. The selection that you make in the **Time zone** field determines the time zone for this entry. **Note:** Time values are always saved in the ServiceNow AI Platform® in UTC time and then translated into the proper time. This translation depends on the selected **Time zone** and the entry in the **Time** field. This field appears only if you select **Daily**, **Weekly**, or **Monthly** in the **Run** field.
Starting	Date and time of the first scheduled job generation. Select the calendar date and time. This field appears only if you select **Periodically** in the **Run** field.
Priority	Numerical priority for the scheduled job:

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Schedule Item form (continued)

Field	Description
	• Set essential jobs to a priority value below 100. • Set nonessential jobs to a priority above 100. • If 70 percent or more of all scheduled jobs are **Overdue**, any jobs that are marked with a value above 100 do not run.
Run as	Name of the user who is creating and running the scheduled job. To assign the scheduled job to the system instead of the person creating the scheduled job, create a system or dummy user and add it to this field.
Conditional	Option for enabling the running of the scheduled job if certain conditions are met in the associated script.
Condition	Conditional script that determines if a scheduled job should run. The last expression of the script should evaluate to a Boolean (true/false) value. This text box appears only if you select **Use conditions**.
Starting	Date and time of the first scheduled job generation. Select the calendar date and time. This field appears only if you select **Periodically** in the **Run** field.

Migrate budget of active projects to Next Experience

Migrate the project budget to Next Experience to manage the financials using Project Workspace.

Before you begin

Role required: it_project_manager

Procedure

1. Navigate to **All** > **Project** > **Projects** > **All**.
2. Migrate baselines using one of the following options.

> **Note:**
> After migration, you won't be able to view the budget on Classic UI. You're encouraged to manage budget using the Financials in Next Experience.

Migrate financial baselines of projects to Next Experience

Migrate the financial baselines of your project to Next Experience to manage the financial using Project Workspace.

About this task

Next Experience uses new data model which has two new tables Investment Baselines (sn_invst_pln_invst_investment_baseline) and Investment Baseline Header (sn_invst_pln_invst_investment_baseline_header) which are used to capture financial baselines. The financial baselines created for demands in classic experience are not visible in Next Experience. You can migrate the existing baselines from classic to Next Experience as an on-demand activity for the required projects, or as bulk by activating and running a scheduled job.

Baselines view in the Next Experience provides better insights to view and analyze the financial performance of your projects.

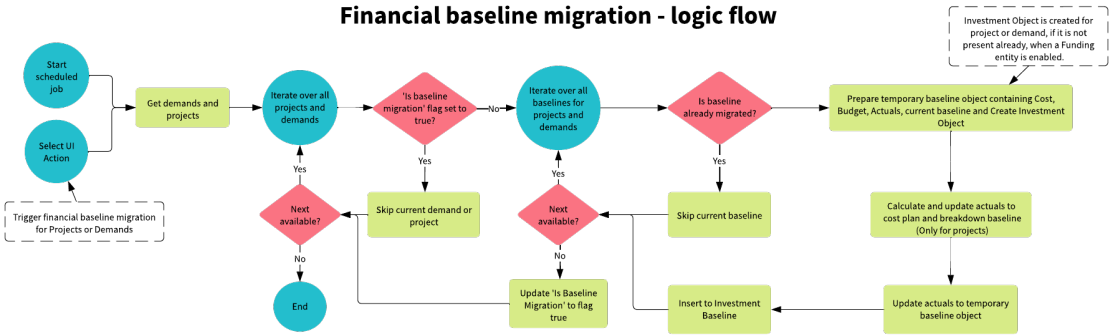
Unlike the financial baselines created using Next Experience, the financial baselines created in the Classic UI do not capture the actual expenses along with planned costs as a default behavior. To have relevant information for baselines comparison, the actual costs will be

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captured as part of the baseline migration using the processed expense lines as of the baseline creation date of the financial baseline.

For detailed information and use cases on using financials in Next Experience, see Managing financials for planning items in Portfolio Planning.

Note:
Migration of financial baselines is not applicable for demands or projects with multi-currency.



Before you begin
Role required: it_project_manager

Procedure
1. Navigate to **All** > **Project** > **Projects** > **All**.
2. Migrate baselines using one of the following options.

Tip:
After migration, you're encouraged to create financial baselines using the Financials in Next Experience.

Result
Financial baselines for the selected projects will be migrated to Next Experience and you can view them in the Baseline view.

What to do next
View and compare the migrated baselines with any existing baselines or current baseline ( ).

Create a project status report

You can periodically create project status report from the related lists of the project form. The project status report created for the most recent status date updates the status of the project in portfolios.

Before you begin
Role required: it_project_manager

About this task
The project status report shows snapshot status of RIDAC (Risk, Issues, Decisions, Actions, and Request Changes) records, key milestones,and charts only.

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To include RIDAC records in the status report, select the **Show on project status report** option on individual RIDAC forms.

You can also print a project status report from project workspace. To print a report, click the print icon () in the header of **Status Report** tab.

Procedure

1. Create a project status report.

2. Fill in the form.

Status report form fields

Field	Description
Project	Name of the project.
Status Date	Date until which you want to generate the status report.
Number	A system generated number for the status report with a configurable prefix.
State	Current state of the project.
Percent complete	Percentage of the project that has been completed.
Planned start date	Planned start date of the project.
Planned end date	Planned end date of the project.
Actual start date	Actual start date of the project.
Actual end date	Actual end date of the project.
Estimated cost	Estimated cost of the project.
Actual cost	Actual cost of the project.

Overall status tab details

Field	Description
Overall health	Color to signify the status of the overall health of the project in the report.
Executive Summary	Brief summary and analysis of the project.
Comments	Comments for the overall status.
Last Week's Achievements	Progress of the project in the last week.
Key Activities planned	Next planned activities for the project.

Schedule tab details

Field	Description
Schedule	Color to signify the status of the schedule-related information of the project in the report.

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Field	Description
Comments on Schedule	Comments related to the project schedule.

Cost tab details

Field	Description
Cost	Color to signify the status of the cost-related information of the project in the report.
Comments on cost	Comments related to the project cost.

Resource tab details

Field	Description
Resources	Color to signify the status of the resources-related information of the project in the report.
Comments on Resources	Comments related to the project resources.

Scope tab details

Field	Description
Scope	Color to signify the status of the scope-related information of the project in the report.
Comments on Scope	Comments related to the project scope.

3. Click **Submit**.

View project status reports

Project status reports provide the most recent, at-a-glance progress of a project displayed in several categories.

Before you begin

Role required: it_project_manager

About this task

The project status report acts as a snapshot, meaning the report preserves the status of various parameters for the date and time when the status report is generated and does not display the status of various parameters dynamically. For example, the project status report created last week retains the same status as it was for that week and does not update the status dynamically. You can use the project status reports to compare the progress of your project. Generate a new project status report for your recent changes to reflect on the report.

The project status report shows snapshot status of RIDAC (Risk, Issues, Decisions, Actions, and Request Changes) records, key milestones, and charts only.

Procedure

1. Open a project status report.

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Note:
You can also open a project status report from the portfolio workbench. Open a portfolio in the portfolio workbench and click **Track Portfolio**. Right-click a project in the **Timeline View** and select **Status Report** from the context menu.

2. Review project status in the following sections.

Project status report sections

Section	Description
Overview	Provides a general overview about the project such as: ○ **Project Name**: Name of the project. ○ **Project Manager**: Project manager assigned to the project. ○ **Portfolio**: Primary portfolio to which the project belongs. ○ **State**: Current state of the project. ○ **Phase**: Current phase of the project such as Initiating, Planning, and Executing. ○ **% Complete**: Percentage of the project completed. ○ **Planned Start Date**: Intended date the project begins. ○ **Planned End Date**: Intended date the project ends. ○ **Planned Cost**: Estimated cost of the project. ○ **Actual Start Date**: Date on which the project began. ○ **Actual End Date**: Actual end date of the project. ○ **Actual Cost**: Actual cost of the project. This information is rolled up from the project form. If you had set your preference as project currency in the **Status report currency** field of the Project form, then the **Overview** tab displays the following project currency fields: ○ **Planned Cost in Project Currency**: Estimated cost of the project in project currency. ○ **Actual Cost in Project Currency**: Cost of the project in project currency. **Note:** The above fields appear when you enable the PPM Standard Multicurrency plugin (com.snc.ppm_multicurrency) and switch to the Project Currency view. For more information, see Multi-currency in project financials.
Summary	Provides information about the overall health of the project. This information is rolled up from the most recent status entered by the project manager for the project. ○ **Executive Summary**: Brief summary and analysis of the project. ○ **Last Week's Achievements**: Progress of the project in the previous week. ○ **Key Activities Planned**: Next planned activities for the project.

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Section	Description
Cost (Planned vs. Actual) chart	If you have enabled the Project Currency view, then the Cost in Project Currency (Planned vs. Actual) section provides information about the actual cost versus the planned cost in project currency. This information is rolled up from the cost plan for the project. ○ **Planned**: Approved cost for the project. ○ **Actual**: Actual cost for the project is derived from the expense line created for the project cost plan and from the time cards created for the project.
Resource (Allocated vs. Actual) chart	Provides information about the actual resource hours used versus the allocated hours. This information is rolled up from the resource plan for the project. ○ **Allocated**: Resource hours that have been allocated to execute the project. ○ **Actual**: The actual time spent is taken from the processed time cards created for the project.
Current Status	Provides the status related to overall health, schedule, cost, resources, and scope of the project. This information is populated from the most recent status entered by the project manager for the project. ○ **Status**: Color indicator to signify the status. ○ **Comments**: Comments for the status.
Status History	Provides the trend of overall health, schedule, cost, resources, and scope of the project. The Status reports can have maximum 9 entries in the status history tab. This information is populated up from the last 9 status reports created for the project. **Date**: Status date of the status reports. The color indicators signify the status of the project on these dates.
Key Milestones	Provides information about key milestones in the project. This information is populated from the project tasks identified as key milestones. ○ **Pending**: List of key milestone tasks in the Pending, Open, and Work in Progress state. ○ **Completed**: List of key milestone tasks in the Closed state.
Risks	Provides information about risks concerning the project. This information is rolled up from the risks that are part of the project. ○ **Pending**: List of risks in the Pending state. ○ **Completed**: List of risks in the Achieved and Not Achieved state. The following information from the Risk record is displayed: ○ Short description ○ Probability ○ Risk status ○ State ○ Assigned to ○ Due date For more information, see Add risks for a project.

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Section	Description
Issues	Provides information about issues included in the project. This information is rolled up from the issues reported for the project. ○ **Pending**: List of issues in the Open and Work in Progress state. ○ **Completed**: List of issues in the Closed state. The following information from the Issue record is displayed: ○ Short description ○ Priority ○ State ○ Assigned to ○ Due date For more information, see Add issues for a project.
Decisions	Provides information about decisions included in the project. This information is rolled up from the decisions reported for the project. ○ **Pending**: List of issues in the Open and Work in Progress state. ○ **Completed**: List of issues in the Closed state. The following information from the Decision record is displayed: ○ Short description ○ Priority ○ Decision status ○ State ○ Assigned to ○ Due date For more information, see Add decisions for a project
Actions	Provides information about action items for the project. This information is rolled up from the actions reported for the project. ○ **Pending**: List of actions in the Open and Work in Progress state. ○ **Completed**: List of actions in the Closed state. The following information from the Action record is displayed: ○ Short description ○ Priority ○ State ○ Approval ○ Assigned to ○ Due date For more information, see Add actions for a project.
Request Changes	Provides information about a change request for the project. This information is rolled up from the change requests created for the project.

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Section	Description
	○ **Pending**: List of project change requests in the Pending, Open, and Work in Progress state. ○ **Completed**: List of project change requests in the Closed state. The following information from the Request Change record is displayed: ○ Title ○ Priority ○ State ○ Category ○ Approval ○ Assigned to ○ Due date For more information, see Create a request change.

Create a cost type definition

Create a cost type definition to associate a cost type, operating, or capital, to an account in the General Ledger from the Financial Management application. Create a cost type definition if you are using Project Portfolio Management with Financials.

Before you begin

Role required: it_pps_admin

Procedure

1. Navigate to **All** > **Project Administration** > **Settings** > **Cost Type Definitions**.
2. Click **New**.
3. Fill out the form fields.

Field	Description
Name	Enter a descriptive name.
GI account	Select an account from the General Ledger Account [itfm_gl_accounts] table.
Expense type	Select **Capex** if a capital expense or **Opex** if an operating expense.

4. Click **Submit**.

Allocate budget to a project

Set the budget of a project according to the fiscal years.

Before you begin

Role required: it_portfolio_manager

Procedure

1. Open the project form.
2. In the related links, click **Project Budget**.

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The **Project Budget** dialog box opens.

3. Select the fiscal year for which you want to set the budget for the project.
4. Enter the amounts for **Capex Budget** and **Opex Budget**.
   The **Total Budget** is updated with the sum of capex and opex amounts.
5. Click **OK**.
   - If the project does not have any cost plan associated, then project budget is distributed by honoring planned start and end dates of the project.
   - If the project has any cost plan associated, then project budget is distributed by honoring the cost plan fiscal periods.

Result

The project budget for the selected year appears in the **Project Budget** related list. You can click the amounts in the list to revise them.

RIDAC records for a project in Project Workspace

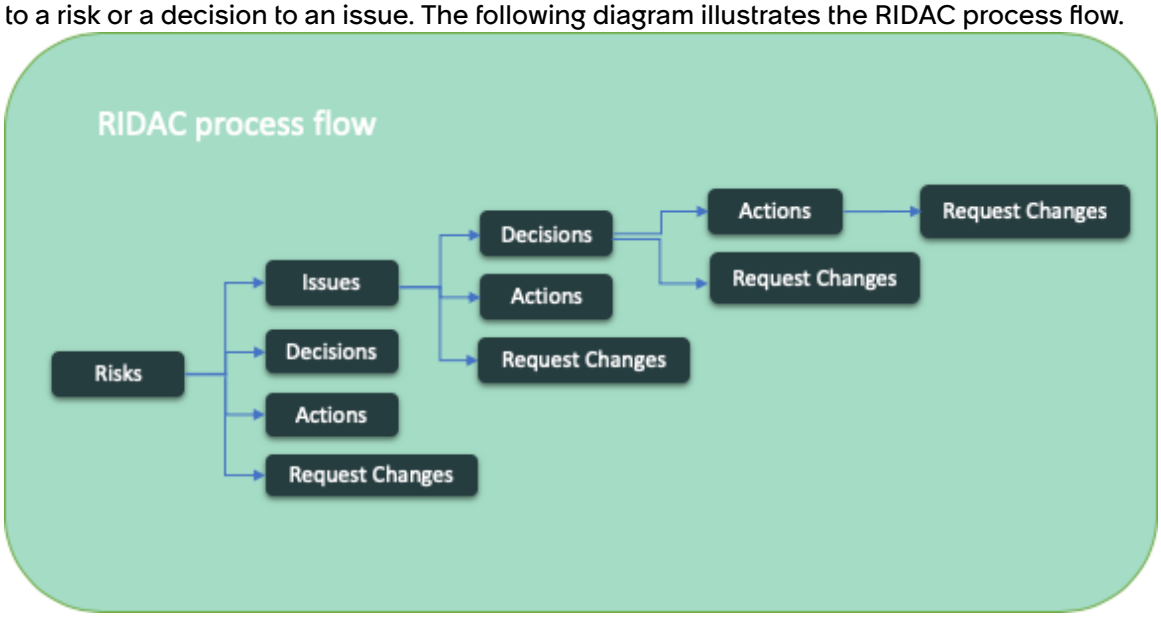
RIDAC is an acronym for Risk, Issue, Decision, Action, and Request Change records. In Project Workspace, you can create a risk record for your project that you can convert to other records during the project life cycle. You can track issues and avoid copying relevant details in the related records.

As a project progresses through the project life cycle, a risk might result in an issue, or a new issue might occur. After you have a risk record, you can convert that record into related records such as issues, actions, or decisions. The conversion and association of records helps you analyze and identify patterns, trends, and probable resolution for planning future projects.

Plan and manage all RIDAC records on a single RIDAC page in Project Workspace. This page enables you to create, edit, convert, and associate RIDAC records on a central location. Navigate to the RIDAC page or Classic Project Workspace from Project Workspace interface.

Consider the following points before converting or associating RIDAC records in Project Workspace:

- You can convert one record to another only in the RIDAC sequence. For example, you can convert a risk to an issue, decision, action, or request change but you can't convert an issue to a risk or a decision to an issue. The following diagram illustrates the RIDAC process flow.



- You can convert one record into multiple RIDAC records. For example, you can create multiple issue records from one risk record.

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For converting RIDAC records in Classic Project Workspace, see Convert one RIDAC (Risk, Issue, Decision, Action, and Request Changes) record to another for a project. For converting RIDAC records in Project Workspace, see Convert one RIDAC record to another for a project in Project Workspace.

- You can associate one record with multiple different records. For example, you can link one issue record to multiple different risk, decision, action, or request change records.

  For associating RIDAC records in Classic Project Workspace, see Associate existing RIDAC (Risks, Issues, Actions, Decisions, and Request Changes) records for a project. For associating RIDAC records in Project Workspace, see Associate existing RIDAC records for a project in Project Workspace.

Add risks for a project

Add a risk to a project to identify, analyze, prioritize, plan, and track a risk during any phase of the project life cycle. Assess potential problems and the severity of their impact to take informed decisions about the project.

Before you begin

Role required: it_project_manager

About this task

A risk is any uncertain event that can potentially impact the success or outcome of a project. For example, an incorrect estimate of factors like financial outlay or resource assignments can cause schedule slippage. Another example of a risk is a change in project requirements. Recording risks ensures that decision makers have all relevant information when assessing a project's progress. A project manager can add risks to a project and assess them. While adding risks, the project manager can add risks from an existing library of project risks that are applicable for their unique projects.

Procedure

1. Navigate to **Project** > **Projects** > **All**.
2. Select the project to which you want to add risks.
3. In the Risks related list, click **New**.
4. Alternatively, click **Create from Library** if you have the Advanced Risk plugin activated.
   a. Select the risk statements as required.
   b. Click **Create Risks**.
   Only the risks statements that belong to the Project category are displayed for the user.
5. On the Risk form, fill in the fields.

Risk form

Field	Description
Number	System-generated ID number with a configurable prefix.
State	Current state of the risk. All new risks are created in the Pending state. The available states are: Pending, Open, Work in Progress, Closed Complete, Closed Incomplete, and Closed Skipped.
Risk status	Status of the risk. It provides information on current status of the risk, whether it is achieved or mitigated or accepted.

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Field	Description
	The available options are: Pending, Achieved, Not Achieved, Avoid, Mitigate, Transfer, and Accept.
Probability	The likelihood that the event described in the risk will occur. The available options are: Absolute, High, Moderate, and Low
Impact	Impact of the risk event on the outcome of the project.
Estimated cost	Estimated cost the risk event generates.
Risk rank	A value and color assigned to the risk. This value is calculated using risk probability and impact. You can configure the color and value using Risk Value Lookup. For more information, see Configure custom Risk rank and Risk value for a project.
Risk owner	Primary resource who is responsible for monitoring and managing the risk.
Assigned to	Primary resource assigned to work on the risk.
Risk value	A value calculated from Risk Value Lookup. For more information, see Configure custom Risk rank and Risk value for a project.
Due date	Requested date for the assigned resource to resolve the risk or the date on which the risk must be closed or addressed if not assigned to any resource.
Show on project status report	Option to specify whether the risk information should be included in the project status report.
Task	Project to which this risk belongs.
Short description	Brief description of the event and its potential impact on the success of the project. If the risk is created from the risk library, then this field displays the Risk Statement name.
Description	Details of the event and its potential impact. If the risk is created from the risk library, then this field displays the Risk Statement short description.
Actual cost	Cost generated by the risk event. This information gets added when and if the event occurs.
Mitigation plan	Brief description of efforts taken to mitigate the risk.

Note:
The Risk Assessment Summary section only appears when the *`Enable Advanced Risk PPM Integration`* property is enabled.

Risk Assessment Summary section in the Risk form

Field	Description
Inherent risk	This field gets auto-populated with the risk scores when the risk assessor assesses the inherent risk.

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Field	Description
Elevated to enterprise risk	This option gets selected automatically when the risk is elevated to enterprise risk by the project manager.
Residual risk	This field gets auto-populated with the risk scores when the risk assessor assess the residual risk.
Enterprise inherent risk	This field gets auto-populated with the risk scores when the risk assessor assesses the enterprise inherent risk.
Enterprise residual risk	This field gets auto-populated with the risk scores when the risk assessor assesses the enterprise residual risk.

6. Click **Submit**.

What to do next

- Assess the risks that have been added. For more information, see Assign project risks to stakeholders for assessment
- Convert an existing risk to an issue, decision, action, or request change and close the risk. For more information, see Convert one RIDAC (Risk, Issue, Decision, Action, and Request Changes) record to another for a project.
- Associate the risk with existing issues so you can track dependencies and recognize trends for the future. For more information, see Associate existing RIDAC (Risks, Issues, Actions, Decisions, and Request Changes) records for a project.

Configure custom Risk rank and Risk value for a project

Configure custom risk rank and value scores (such as High-Medium, Medium-Low, or Absolute-Low) to rate the impact and probability factors for a risk.

Before you begin

Role required: pps_admin

About this task

Use the Risk Value Lookup module to set up the risk rank and risk value for a specific combination of risk impact and probability. The system uses these values to determine the degree of risk (Absolute, High, Medium, Low) based on the impact and probability factors of a risk.

The value in the **Probability** field is multiplied by the value of the **Impact** field to generate the values for the **Risk rank** and corresponding **Risk value** in the Risk form.

By default, you can use the following impact, value, and probability scores for a risk to create a risk rank and risk value score:

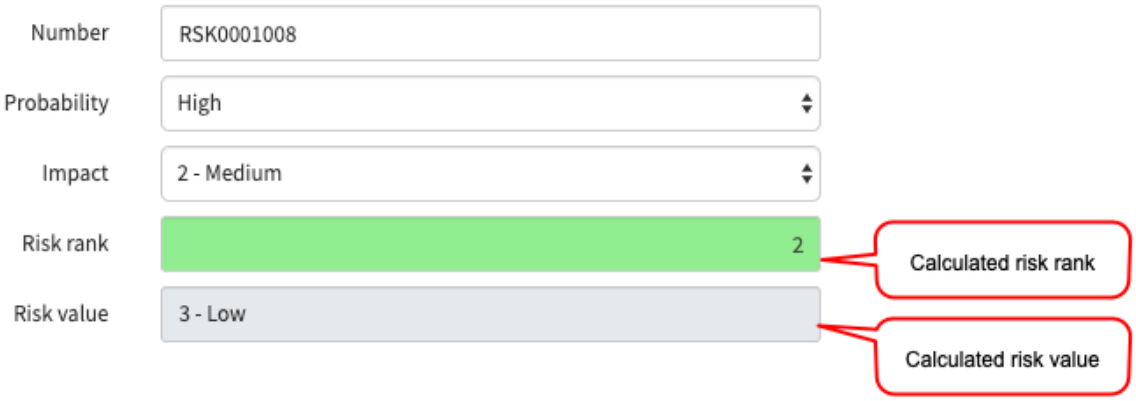
- Absolute
- Low
- Medium or Moderate
- High

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For example, a risk might have high probability and medium impact but you might want to consider it as an overall low risk for the project. In that case, you would configure the Risk Value Matcher form with the following values:

- Impact = 2 Medium
- Risk Rank Color = Green
- Probability = High
- Probability Number = 1
- Risk Value = 3 Low

The following image illustrates the results of this example on the Risk



form.

Procedure

1. Navigate to **All** > **Project Administration** > **Settings** > **Risk Value Lookup**.
2. Click **New**.
3. On the form, fill in the fields.

Risk Value Matcher form

Field	Description
Impact	Impact value of the risk. The default values are: ○ 1 = High ○ 2 = Medium ○ 3 = Low
Application	The application to which these risk values belong.
Risk Rank Color	Color to indicate the severity of the risk. **Tip:** You can enter variations of a color to differentiate between risks with similar impact and probability values. For example, you could enter **lightgreen** to indicate a low-severity risk.

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Field	Description
Risk Value	The value for the specified risk impact and probability combination. The options are: High, Medium, and Low. This value is displayed in the **Risk value** field of the Risk form.
Probability	Risk probability value to associate with the impact value of the risk. The options are: Absolute, High, Moderate, and Low.
Probability Number	Numerical value to indicate the probability. This value is multiplied by the value of the **Impact** field for calculating risk rank. The default values are: ○ 1 = Absolute ○ 1 = High ○ 2 = Moderate ○ 3 = Low The calculated risk rank and the risk rank color are displayed in the **Risk rank** field of the Risk form.

4. Click **Submit**.

Add issues for a project

Add an issue to a project to escalate a risk or to track an unexpected problem such as a technical malfunction or resource unavailability that occurs during any phase of the project life cycle. If the issue remains unresolved, unnecessary conflicts, delays, or even a failure can occur.

Before you begin

Role required: it_project_manager

Procedure

1. Navigate to **Project** > **Projects** > **All**.
2. Select the project to which you want to add an issue.
3. In the Issues related list, click **New**.
4. On the Issue form, fill in the fields.

Issue form

Field	Description
Number	System-generated ID number with a configurable prefix.
State	Current state of the issue. All new issue records are created in the Open state.

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Field	Description
	The available states are: Pending, Open, Work in Progress, Closed Complete, Closed Incomplete, and Closed Skipped
Priority	Urgency of resolving or managing the issue based on possible impact.
Estimated cost	Estimated cost the issue generates.
Impact	Impact on the outcome of the project if the issue remains unresolved.
Due date	Requested date for the assigned resource to resolve the issue or the date on which the issue must be closed or addressed if not assigned to any resource.
Assigned to	Primary resource assigned to work on the issue resolution.
Parent	Project to which this issue belongs.
Show on project status report	Option to specify whether the issue information should be included in the project status report.
Short description	Brief description of the issue and its potential impact on the success of the project. As you start typing the title for your issue, related issues that potentially match your issue are displayed. Click the suggestion icon ( ) to select from the list of predefined issue descriptions.
Description	Details of the issue and its potential impact.
Work notes	Information to record and track the work accomplished for resolving the issue.

5. **Optional:** Search in the knowledge base for any article related to the issue.

   a. Click the search knowledge icon ( ).

   b. If you find relevant articles, click the title of an article to view its content.

   c. If you want to include the content of the article in the issue, click **Attach to Issue**.
   The article content is copied in to the **Description** field of the Issue form. You can modify the text if necessary.

6. Click **Submit**.

What to do next

- Convert an existing issue to decision, action, or request change and close the issue. For more information, see Convert one RIDAC (Risk, Issue, Decision, Action, and Request Changes) record to another for a project.
- Associate the issue with your existing risks so you can track dependencies and recognize trends for future. For more information, see Associate existing RIDAC (Risks, Issues, Actions, Decisions, and Request Changes) records for a project.

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Add decisions for a project

As a project manager, develop a plan to manage risks and issues proactively with solutions. Add the solution for a risk or issue to a project in the form of a decision. You can also convert a risk or an issue to a decision or a decision to an action or a request change.

Before you begin

Role required: it_project_manager

Procedure

1. Navigate to **Project** > **Projects** > **All**.
2. Select the project to which you want to add a decision.
3. In the Decisions related list, click **New**.
4. On the Decision form, fill in the fields.

Decision form

Field	Description
Number	System-generated ID number with a configurable prefix.
State	Current state of the decision. All new decision records are created with Open state. The available states are: Pending, Open, Work in Progress, Closed Complete, Closed Incomplete, and Closed Skipped
Priority	Urgency of approving or implementing the decision based on possible impact.
Decision status	Status of the decision. The available options are: Pending, Approved, and Rejected.
Impact	Impact on the outcome of the project if you do not implement the decision.
Approval required	Option for determining whether approval of the decision is required.
Estimated Cost	Estimated cost of implementing the decision.
Due date	Requested date on which the decision must be approved or implemented.
Assigned to	Primary resource assigned to work on the decision. The default value is the name of the user creating the decision record.
Parent	Project number to which this decision belongs.
Show on project status report	Option to specify whether the decision information should be included in the project status report.
Short description	Brief description of the decision such as what the decision is about, who made it, what it affects, and the decision outcome. As you start typing the title for your decision, related decisions that potentially match your decision are displayed. Click the Suggestion icon ( ) to select a description from the list of predefined decision descriptions.

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Field	Description
Description	Details of the decision and its potential impact.
Work notes	Information to record and track the status of decision implementation or approvals.

5. **Optional:** Search in the knowledge base for any article related to the decision.

   a. Click the search knowledge icon ( ).

   b. If you find relevant articles, click the title of an article to view its content.

   c. If you want to include the content of the article in the issue, click **Attach to Decision**. The article content is copied in to the **Description** field of the Decision form. You can modify the text if necessary.

6. Click **Submit**.

What to do next

- Convert a decision to an action or request change and close the decision. For more information, see Convert one RIDAC (Risk, Issue, Decision, Action, and Request Changes) record to another for a project.
- Associate the decision with your existing issues and risks so you can track dependencies and recognize trends for future. For more information, see Associate existing RIDAC (Risks, Issues, Actions, Decisions, and Request Changes) records for a project.

Add actions for a project

Add actions that are required for resolving an issue or risk for a project. You can also convert a risk, issue, or decision to an action based on your analysis and plan for resolution of a risk or issue.

Before you begin

Role required: it_project_manager

About this task

After analyzing the risks and issues and taking a decision on how to manage those risks and issues, add an action for resolving the risk or issue to a project.

Procedure

1. Navigate to **Project** > **Projects** > **All**.
2. Select the project to which you want to add an action.
3. From the Actions related list, click **New**.
4. On the Action form, fill in the fields.

Action form

Field	Description
Number	System-generated number with a configurable prefix.
State	Current state of the action. All new action records are created with the state set to Open.

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Field	Description
	The available states are: Pending, Open, Work in Progress, Closed Complete, Closed Incomplete, and Closed Skipped
Priority	Urgency for implementing or approving the action based on impact.
Estimated Cost	Estimated cost the action generates.
Impact	The impact on the outcome of the project if you do not implement the action.
Approval	Status of approval from the stakeholders for the action. A user with approval administrator role can only change the status of approval.
Assigned to	Primary resource assigned to implement the action.
Due date	Requested date on which the action must be approved or implemented.
Parent	The project to which this action belongs.
Show on project status report	Option to specify whether the action information should be included in the project status report.
Short description	Brief description of the action such as what the action entails, how to implement the action, who it affects, and the action outcome. As you start typing the title for your action, the related actions that potentially match your action title appear. Click the Suggestion icon ( ) to select a description from the list of predefined actions.
Description	Details of the action and its potential impact.
Work notes	Information about the action. Add work notes to communicate about the status of action approval, rejection, or implementation with other users.

5. **Optional:** If the action requires approval from other stakeholders, request approval with a due date using the **Approval** and **Due date** fields.
6. Click **Submit**.

What to do next

- Convert an action to a request change and close the action. For more information, see Convert one RIDAC (Risk, Issue, Decision, Action, and Request Changes) record to another for a project.
- Associate the action with your existing risk, issue, and decision records so you can track dependencies and recognize trends for future. For more information, see Associate existing RIDAC (Risks, Issues, Actions, Decisions, and Request Changes) records for a project.

Create a request change

As a project manager, you might create a request change as the outcome of the action taken to resolve an issue or mitigate a risk. The request change might result in changing the project's scope, resource requirement, cost, or schedule to minimize the impact of a risk or issue.

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Before you begin

Role required: it_project_manager

Procedure

1. Navigate to **Project** > **Projects** > **All**.
2. Select the project to which you want to add a request change.
3. In the Request Changes related list and click **New**.
4. On the form, fill in the fields.

Request Change form

Field	Description
Number	System-generated ID number with a configurable prefix.
State	Current state of the request change. All new request change records are created in the Open state. The available states are: Pending, Open, Work in Progress, Closed Complete, Closed Incomplete, and Closed Skipped
Priority	Urgency for approving the requested changes based on impact.
Estimated Cost	Estimated cost the requested changes generate.
Impact	Impact on the outcome of the project if you do not approve the requested changes.
Approval	Status of approval from the stakeholders for the requested changes.
Assigned to	Primary resource assigned to work on the request change.
Due date	Requested date to complete the request change.
Category	Entity for which you are creating the request change. The options are: Resource, Scope, Cost, and Schedule.
Parent	Project number to which this request change belongs.
Show on project status report	Option to specify whether the request change information should be included in the project status report.
Title	Title for the change request.
Description	Details of the request change and its potential impact.
Business Justification	Reason for requesting the proposed change in the project and its impact on the business.
Work notes	Additional information to indicate progress on the project request change.

5. Click **Submit**.

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What to do next

- Associate the request change with your existing risk, issue, decision, and action records so you can track dependencies and recognize trends for future. For more information, see Associate existing RIDAC (Risks, Issues, Actions, Decisions, and Request Changes) records for a project.
- Create tasks for working on the change request. For more information see, Create a task from an incident, problem, or change request.

Convert one RIDAC (Risk, Issue, Decision, Action, and Request Changes) record to another for a project

Convert one RIDAC record (risk, issue, action, decision, and request changes) to another, in that order, to retain the record information instead of having to create a new record manually and to more easily track the issue.

Before you begin

Role required: it_project_manager

About this task

When you convert a RIDAC record to another record, the values for the **Short description**, **Requester**, and **Assigned to** fields are carried forward.

You can also specify to close the parent record on creation of the new record instead of manually closing the parent record.

You can also view the consolidated list of all converted RIDAC records using the **View RIDAC** related link on the Project form and **View RIDAC** in the application navigator of the Project module.

Procedure

1. Navigate to **Project** > **Projects** > **All**.
2. Select the project for which you want to convert a risk, issue, decision, action, or request change record to another RIDAC record.
3. From the Project form related list, click the risks, issues, decisions, actions, or request changes record to open the form view.
4. Click the **Convert to RIDAC** related link on the form.
5. **Optional:** On the Convert dialog box, from the Select task type list, select the RIDAC record to which you want to convert the selected record.
   For example, if you wanted to convert a risk to an issue, you would select **Issue**.
6. **Optional:** Modify the text in the **Short description** field, which is copied from the parent record.
7. **Optional:** Change the default assignment copied from the parent record in the **Assigned to** field by clicking the lookup icon ( ) and selecting a different user.
8. **Optional:** If you want to close the parent RIDAC record on creation of the new record, select the close parent record option.
   The label of the close parent record option changes depending on the parent record type.
   For example, if the parent record is Risk and you are converting it to an issue record, the close record option would appear as **Close Risk**.
9. Click **OK**.

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Associate existing RIDAC (Risks, Issues, Actions, Decisions, and Request Changes) records for a project

Link existing RIDAC records (risks, issues, actions, decisions, and request changes) to one another for your project. Associating RIDAC records with each other enables you to keep a record of risks or issues and their outcome for analysis at project closure and planning. It also helps to track the risks and issues throughout the project life cycle.

Before you begin
Role required: it_project_manager

About this task
You can associate one record with multiple different records. For example, you can link one issue record to multiple risk, decision, action, or request change records.

Procedure
1. Navigate to **Project** > **Projects** > **All**.
2. Select the project for which you want to associate one RIDAC entry to another.
3. In the Project form related list, select the RIDAC record.
4. On the form, click the **Associate RIDAC** related link.
5. In the Associate dialog box, from the Select type list, select the RIDAC record to which you want to associate the selected record.
   For example, if you wanted to associate a risk to an issue, you would select **Issue**.
6. Select the record number to which you want to associate the selected record from the Associate to list.
   For example, if you wanted to associate the selected risk to issue (ISU0010003), you would select **ISU0010003**.
7. Click **OK**.

Change the planned start date of a project

Adjust the schedule of a project by changing the planned start date of a project and shifting it later or earlier than the current planned schedule.

Before you begin
Role required: it_project_manager

About this task
Changing the planned start date of a project to a new date also moves all its tasks and subprojects relative to the updated start date of the project. You can change the planned start date of a project when the following conditions are true:

- The **State** of the project is Pending or Open.
- To move the start date of a project in WIP state, set the **Enable move project for WIP projects** property (*com.snc.project.move_project.wip*) to true. The default value of this property is false.
- No project_funding records are selected for execution.
- The project actual dates are not populated.

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Note:

- The **Move project** option is available for a project only when it has a task or subproject.
- If an agile phase with sprints is associated to the project, then changing the planned start date of the project also clears the start and end dates of the sprints.

Procedure

1. Change the planned start date of a project using either of the following options.

2. In the dialog box, pick a date.
3. Select or clear the **Move all tasks regardless of constraint type** check box.
   - Clearing the check box moves the tasks with Start ASAP constraint only to the new project date.
   - Selecting the check box moves all the project tasks irrespective of their constraints to the new project date with the same offset except the task with Start ASAP constraint.

   This check box is selected by default.

   Note:
   The tasks in WIP and Close states are not moved.

4. Click **OK**.

Result

- The planned start date of the project is updated to the new date.
- Program dates are updated relative to the project start date.
- If the **Move all tasks regardless of constraint type** check box is selected, all project tasks with Start on specific date and Start no earlier than constraints are moved to a new start date by the same offset as from the earlier project start date. The constraint date is also moved by the same offset.

  For example, say a project is starting on November 10 with a Start On task starting on November 15, giving an offset of five days. If you move the project start date to November 20, then the task start date will be moved to November 25, maintaining the five-day offset from the project start date.

- All project tasks with Start ASAP constraint are moved to the new start date based on the **Constraint Date** field on the project form. The tasks must be in the Open or Pending state.
- If the **Change Resource Plan and Cost Plan Start Date with Demand or Project Start Date Change** property is selected, all related entities like cost plan, resource plan, and benefit plans are moved relative to the project start date. For more information on how to set this property, see Properties installed with Project Management.

Pre-date a project task

Move the planned start date of a task prior to the planned start date of a project. Adding a pre-dated task allows you to accommodate tasks which need to start before the planned start date of a project.

Before you begin

You should have created or added project tasks to your project.

Role required: it_project_manager

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About this task

Before pre-dating a project task, note the following conditions:

- The property project.rollup_project_start_date should be set to true.
- Pre-dating a task's planned start date also moves the project's planned start date.
- The start date of a child task cannot be moved prior to the parent task's start date. For example, if a parent task with Start no earlier than constraint starts on 20th and the child task starts on 30th, the start date of the child task can only be moved up to 20th.

Procedure

1. Navigate to **Project** > **Projects** > **All**.
2. Select the project from the list.
3. On the Project form, update the planned start date for a project task using either of the following options.

4. In the Move date dialog box, click **OK**.

Recalculate costs of all resource plans in a project

Recalculate the resource costs of all resource plans in a project whenever the hourly rates change in the associated rate model so that the plan costs are up to date.

Before you begin

Ensure the following setup:

- The project must be active.
- The project must have an active rate model assigned.
- The resource plans must be in the Planned, Requested, Confirmed, or Allocated state.

Role required: project_manager

About this task

This option recalculates the costs of all resource plans of the project at once. You can also open a resource plan from the **Resource Plans** related list to recalculate the resource costs of an individual resource plan.

Procedure

1. Navigate to **Project** > **Projects** > **All**.
2. Open a project.
3. On the Project form, right-click on the header bar and select the **Recalculate Resource Costs** option.
4. In the Recalculate Resource Cost dialog box, fill in the fields.

Recalculate Resource Costs dialog box

Field	Description
Start date	Start date of the time period for which the costs are recalculated. By default, the field shows the current date.

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Field	Description
End date	End date of the time period for which the costs are recalculated. By default, the field shows the end date of the project.
Planned costs for Requested Resource plans	Option for recalculating the planned cost of Requested resource plans.
Confirmed/Allocated costs for Confirmed/ Allocated resource plans	Option for recalculating the confirmed or allocated cost of Requested resource plans.
Planned costs for Confirmed/Allocated resource plans	Option for including the planned cost of a Confirmed or Allocated plan. The option is enabled if the **Confirmed/ Allocated costs for Confirmed/Allocated resource plans** option is selected. By default, the option is not selected.

5. Click **OK**.

Result

- Recalculates the selected resource costs of all the applicable resource plans in the project based on the latest hourly rates. The hourly rates are derived from the rate model associated with the project.
- Updates the recalculated resource costs on the respective cost fields on the resource plan form and the Resource Plans related list.
- Reflects the revised values on the respective cost fields of the project.

Project templates

A project template defines the basic structure of a project.

Project templates can 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. A project is considered empty when it does not contain any subtasks.

With the project manager role, you can:

- Create project templates
- Use templates to create a project

With the PPS admin role, you can modify the project template configuration.

Create a project template

You can create a template from an existing template or a project.

Before you begin

Role required: it_project_manager

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About this task

When you create a template from a project, all the project attachments and checklists are copied to the template. You can add or remove attachments from the template using the Project Template form. A project template created from an off-schedule project honors the off-schedule tasks.

Procedure

1. Create a template.

2. Fill in the following fields:
   - **Template name**: enter a unique name for the new template.
   - **Description**: enter a brief description of the new template.
3. Click **OK**.
   The project template form opens for the newly created template.
4. Make any desired changes to the fields on the project template form.
   The top section of the Project Template form includes basic template information, such as the template name and description. The middle section of the project template form defines the specific data included in the template. The information in this section is built from fields on the project [pm_project] table that the user selects and the values for those fields that the user defines.

Project Template Form Fields

Field	Description
Name	The name of the project template.
Table	Display only. Templates are based on the Project table.
Description	A brief description of the project template.
Template	Includes columns of fields and field values to be included in the template. Click a field in the left column and select the desired field name, then click the field in the right column to enter the field value. If additional information for the field is required, a field appears in the third column. For example, to identify the currency in a money field. ○ Click the **X** to the right of a field to remove that field from the template. ○ Use the blank field at the bottom of the list to add new fields.

Related Links

Field	Description
Create Project	Creates a project from this project template.
Copy Template	Creates a copy of this project template.

Related Lists

Field	Description
Project Template Tasks	The project template task list.

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Field	Description
Attachments	The files attached to the template.

5. Click **Update**.

Add an attachment to a project template

Attach a file to a project template just as you can attach a file to a project or task.

Before you begin
Role required: it_project_manager

Procedure

1. Navigate to **All** > **Project** > **Projects** > **Templates**.
2. Open the desired template.
3. Click the **Attachments** tab to open the related list.
4. Click **New**.
5. Click **Browse** on the Attachments dialog box and select a file.
6. If desired, click **Add Another Attachment** to select another file.
7. Click **Attach**.
   The selected file appears in the Attachments related list.

Apply a template on the Project form

While creating a project using the Project form, you can apply a project template to include project tasks and subtasks, attachments, checklists, and other project information. You can apply a project template to a new project or an existing project.

Before you begin
Role required: it_project_manager

About this task
A project created from the off-schedule project template honors the off-schedule tasks and adjusts the dates according to the given start date.
When applying a template to a project, the project state is set to the default state. Activate the default project state (pm_project.state = -5), and use it as the default value as it is Out Of The Box. You can update the label for the **State** field to meet your requirements if **Pending** doesn't fit well.

Procedure

- To apply a template on the blank project form:

  1. Navigate to **Project** > **Projects** > **Create New**.
  2. Click the link next to **To create project from a template**.
     The **Apply Template** window appears.
  3. Enter the project name, select the start date, and select a project template.

- To apply a template to an existing project without any project tasks or subprojects:

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1. Navigate to **Project** > **Projects** > **All** and select a project.
2. Click the **To apply template click here** link.
   The **Apply Template** window appears.
3. Select the start date and select a project template.

Apply template to an existing project

Apply one or multiple project templates to an existing project from the project form or Planning Console.

Before you begin
Role required: it_project_manager

About this task
A project created from the off-schedule project template honors the off-schedule tasks and adjusts the dates according to the given start date.
When applying a template to a project, the project state is set to the default state. Activate the default project state (pm_project.state = -5), and use it as the default value as it is Out Of The Box. You can update the label for the **State** field to meet your requirements if **Pending** doesn't fit well.

> **Important:**
> Application of template on a project having project tasks does not apply header information and only appends project tasks after the last project task of the project.

Procedure
1. Apply project template to an existing project from any of the following locations.
2. In the Apply template dialog box, from the Project template list, select a project template.
3. Click **Save**.
4. **Optional:** To apply multiple project templates, repeat the steps 1 to 3.
   Tasks from the template are added at the end of the last task.

Apply template to a blank project in project workspace

When you create a new project in the project workspace, you can apply a template.

Before you begin
Role required: it_project_manager

About this task
A project created from the off-schedule project template honors the off-schedule tasks and adjusts the dates according to the given start date.
When applying a template to a project, the project state is set to the default state. Activate the default project state (pm_project.state = -5), and use it as the default value as it is Out Of The Box. You can update the label for the **State** field to meet your requirements if **Pending** doesn't fit well.

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Procedure

1. Navigate to **All** > **Project** > **Projects** > **Project Workspace**.
2. In the project workspace header, click **New Project** button on My Projects Space page.
3. Enter the project name, select the start date, and select a template in **Create Project** dialog box.
4. Click **OK**.

Related topics

Define a project

Project template configuration

The Project Template Configuration list defines the items that are included in a template.

Navigate to **Project Administration** > **Settings** > **Template Config** to display the Project Template Configuration list. Each item in this list has:

- A defined parent table. The exception is pm_project, which is the root or top-level object in the template.
- A link element. A field that links the parent table and the child table.
- A list of fields to include in the template. The fields defined in this column are the fields that are copied to a project template.

The Project Template Configuration list contains three default template configuration items: project, project task, and project subtask. You can modify these default items or create additional items from this list.

Default Project Template Configuration Items

Item	Definition	Parent	Link Element
pm_project	Project object	None. This object does not have a parent because it is the root level.	None. This object does not have a link element because it is at the root level.
pm_project_task	Project task object	pm_project	Parent. Because this task object is one level below the root level, it uses the parent table as a link element.
pm_project_task	Project subtask object	pm_project_task	Parent. Because this subtask object is two levels below the root level, it uses the parent table as a link element.

Click an item in the Project Template Configuration list to open the project Template Configuration form.

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Project Template Configuration form



Project Template Configuration form fields

Field	Definition
Table	The entity to be parameterized in the template.
Parent table	The parent table for this item.
Link element	The field that links the table with the parent table.
Active	A check box that indicates this item is included in a template.
Elements	A comma-separated list of fields from the table selected in the **Table** field that are included in the template.

Add a project template configuration item

Add a project template configuration item to include in a template.

Before you begin

Role required: it_pps_admin

Procedure

1. Navigate to **All** > **Project Administration** > **Settings** > **Template Config**.
2. Click **New**.
3. Fill in the fields on the Project Template Configuration form.
4. Click **Submit**.
   For example, to add a requirement object to the project template configuration, fill in the fields as follows:
   - **Table**: Requirement [dmn_requirement]
   - **Parent table**: Project [pm_project]
   - **Link element**: Parent
   - **Active**: Enable this check box
   - **Elements**: short_description, description, priority, type, state

Related topics

Project templates

Project template configuration

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Modify a project template configuration item

Modify a project template configuration item included in a template.

Before you begin
Role required: it_pps_admin

Procedure

1. Navigate to **All** > **Project Administration** > **Settings** > **Template Config**.
2. Select a configuration item from the list.
3. Make any desired changes to the fields on the Project Template Configuration form.
4. Click **Update**.

Related topics

Project templates

Project template configuration

Add a project template configuration item

Delete a project template configuration item

Do not delete any of the default template configuration items: project, project task, or project subtask. Doing so affects the ability to create project templates.

Before you begin
Role required: it_pps_admin

Procedure

1. Navigate to **All** > **Project Administration** > **Settings** > **Template Config**.
2. Select a configuration item from the list.
3. Click **Delete**.

Project tasks

Project tasks are the units of work that make up a project.

The size and number of tasks that comprise a project depends on the level of detail you want. For example:

- Part of a task requires a specific skill.
- Other activities in the task do not require the specific skill.

Break down that task further.

Bottom-up Tasking

Bottom-up (tactical) tasking means that you plan small, individual units of work that are required, then build a project up to include larger phases. Take this approach when you know what individual tasks are required to be accomplished and you are more flexible about overall project duration and estimated cost. Use this approach to see how much a project costs and how long it takes if you include every task. Project management supports tactical tasking by using rollup calculations on several project fields, such as project duration, so that the project adjusts to the tasks it contains. It is the recommended approach for the Project Management application.

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Top-down Tasking

Top-down (strategic) tasking means that you plan high-level tasks first, then break down the work into smaller units. Take this approach when you want to build a project with fixed or inflexible time and budgetary constraints and well-defined phases. Establish well-defined milestones and dependencies between tasks that you consider from the beginning. Gradually add smaller tasks to the project later. This approach avoids including all possible tasks in a project and stays flexible with what tasks are included.

Note:
When you use this method, the Project Management application still rolls up several values, such as task duration. Creating a task with a longer duration than the project, expands to cover the entire duration of the task, and defeats the purpose of using this approach. Values are not rolled down from parent tasks, nor are there any restrictions on creating child tasks that are longer than specified duration of the parent.

Project task relationships and dependencies

The Project Management application enables you a create parent-child relationships between tasks and dependencies, such as finish-to-start and finish-to-finish, between tasks.

This table explains the types of task relationships and dependencies that you can create.

Project relationships and dependencies

Concept	Description
Finish-to-start dependency	A dependency that indicates that a task must not be started until its predecessor finishes.
Start-to-start dependency	A dependency that indicates that a successor task must not be started until the predecessor task has started.
Start-to-finish dependency	A dependency that indicates that a successor must not be finished until the predecessor task starts.
Finish-to-finish dependency	A dependency that indicates that a task must not be finished until another task finishes.
Lag time	A manually specified time break between predecessor and successor tasks.
Parent task	A project task with smaller tasks, referred to as child tasks, underneath it. Child tasks break down the work of a parent task into more manageable subsets. Certain fields for child tasks, such as planned end date, roll up and affect the same field in the parent task.
Child task	A project task that is a subset of a larger task. Child task start dates cannot occur before the start date of the parent task.
Rollup task	Another term for a parent task in the context of aggregating child task items, such as effort or resources, into a larger parent task calculation. All fields on rollup task forms are read-only.
Roll down	State changes roll down from the project to project tasks, and from parent tasks to child tasks.

Note:
Only one relationship can exist between two tasks.

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The Project Management application provides several properties that control how tasks are calculated and behave. See Project property for more information.

Project task dependencies

A task dependency is created when one task is prevented from starting or finishing based on its relationship with the preceding and succeeding tasks.

The Project Management application supports several types of dependencies.

Task time constraints

The Project Task form includes a **Time Constraint** field, which can be one of the following values:

- If a task is set to **Start ASAP**: The task appears on the Gantt chart as starting when the dependency allows it. However, a task can start on a later date when a lag value is set for the relationship.
- If a task is set to **Start on specific date**: The task appears on the Gantt chart as starting on the constraint date. The start date of such a task is not impacted even after you put the task in a relation to another task, for example, FS relation.
- If a task is set to **Start no earlier than**: The task appears on the Gantt chart as starting on or after the constraint date. If the task has no predecessor, the task starts on the specified date. The start date changes to a later date based on the predecessor task end date or if the task is in a relation to another task, for example, FS relationship.
- If a task is set to **Start no later than**: The task appears on the Gantt chart as starting on or before the constraint date. If the task has any predecessor task, the dependency on the predecessor task determines when the task can start. A scheduling conflict occurs if the predecessor task attempts to move the task beyond the date specified in the **Constraint date** field.

  Note:
  The project property **Retain start on constraint on tasks after adding relations** controls the behavior for **Start on** selection. The property is set to True by default and is not editable.

- A task that is not honoring dependency is indicated with a red calendar icon on the Planning Console. If you want the task to honor the dependency and adjust the start accordingly, change the constraint type of the task to **Start ASAP**.

Create a dependency from the planning console

You can create a dependency between two tasks on the planning console.

Before you begin

Role required: it_project_manager

About this task

You can create any type of dependency. See Project task relationships and dependencies for an explanation of each type.

You can also create dependencies by using the Predecessor column on the Planning Console. See Predecessor dependencies in the planning console for more information.

Procedure

1. Click a task on the Gantt chart portion of the planning console.
   A white circle appears on either end of the task, one at the start of the task and the other at the end of the task.

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2. To create a dependency, click one of the white circles and drag it to the start or end of another task.
3. Double-click the dependency line to see the dependency on the Planned Task Relationship form.
4. Confirm that your dependency is correct.
   You can make changes to the dependency as needed.

Modify a project task dependency

You can modify a dependency when editing the tasks that are linked in the dependency, the dependency type, or the lag time.

Before you begin

Role required: it_project_manager

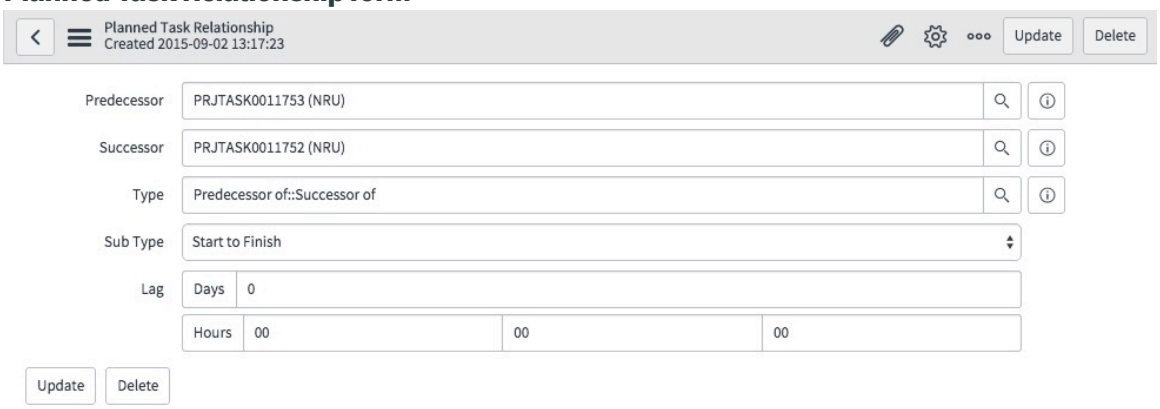
About this task

Project task dependencies are saved on the Planned Task Relationship [planned_task_rel_planned_task] table. You can access dependencies from the planning console.

Procedure

1. Double-click a dependency on the Gantt chart of the planning console.
2. Modify any of the fields (see table).

Planned Task Relationship form



Planned Task Relationship form fields

Field	Description
Predecessor	The predecessor, or determiner, in the relationship. You can select a new task. However, it is a good practice to delete the relationship and create a new relationship between the correct tasks.
Successor	The successor in the relationship. The successor depends on the predecessor. You can select a new task. However, it is a good practice to delete the relationship and create a new relationship between the correct tasks.
Type	The type of relationship, which is always **Predecessor of::Successor of**. Do not change this value.
Sub Type	The type of dependency. See Project task relationships and dependencies for a description of each type.

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Field	Description
Lag	The lag time between the tasks. The Enter the days, hours, minutes, and seconds for the lag. Lag time can be positive or negative.

3. Click **Update**.

You can view dependencies in the Project Task related list on a Project or Project Task form and from the Project Tasks list on the workbench. These columns show the dependencies:

- The **Dependency** column shows the successor task in the relationship.
- The **Dependencies** column shows the dependency value. See Predecessor dependencies in the planning console for a description of what you see in this column.

Remove a dependency

Use the planning console to remove a dependency that is no longer necessary.

Before you begin

Role required: it_project_manager

About this task

Removing the dependency also deletes the dependency record in the Planned Task Relationship table.

Procedure

1. Open the project in the planning console.
2. Do either of the following.

Option	Description
On the Gantt chart	○ Right-click the relationship and then click **Delete Link**. ○ Double-click the relationship and then click **Delete** on the **Planned Task Relationship** form that appears.
On the WBS list	○ Delete the value in the **Predecessor** col umn. ○ Click the value in the **Predecessor** column and then click **Delete** on the **Planned Task Relationship** form that appears.

Parent-child task relationships

If a task is relatively large and requires several users with different skills to manage, break the task into subtasks and create parent-child relationships. A child task is a relatively smaller, manageable size of work.

When you group child tasks together under a parent, values such as **Estimated cost** aggregate and roll up to the parent task. So the parent task takes on the form of a summary task or rollup task for its child tasks. **Planned start date** and **Planned end date** rollup occurs when you create child tasks: the duration of the parent automatically adjusts to cover its child tasks.

A parent-child relationship is different from a dependency relationship. In a dependency, one task must finish before another begins. In a parent-child relationship, any number of tasks can be

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nested under a parent task with or without any dependencies. When you create a parent-child relationship, the parent task number is saved in the **Parent** field in the Project Tasks table. All project management tasks have a parent: either another project task or the project itself.

Unlike a dependency, a parent-child relationship is not saved as a record in any table. The only modification that takes place when a parent-child relationship is modified is the **Parent** field in the child task record.

You can create predecessor-successor relationships between child tasks with different parents, between two different parent tasks, or between a child task and another parent task. However, if the predecessor task finishes after the successor task starts, creating a dependency between child tasks that have different parents is not allowed.

Note:
On the Gantt chart, you can drag-and-drop the parent task to move the entire hierarchy to a new location on the schedule.

Create a parent-child relationship on the Project Task form

You can create a child task from any project task form.

Before you begin
Role required: it_project_manager

Procedure

1. Navigate to the parent task in the relationship.
2. In the **Project Tasks** related list, click **New**.
3. Create the task and click **Submit**.
   The newly created task becomes the child task in the relationship.

What to do next
To help remember what the parent of any task is, view the breadcrumb at the top of the Project Task form. It is also helpful to configure the form layout to include the **Parent** field. You can also change the parent task from this field.

Parent task



Time constraints in parent-child relationships

Parent-child task relationships have several effects on task time constraints.

When a child task is set to Start ASAP

The child task starts at the same time as the parent task. If Project itself is set as a parent, the **Start ASAP** tasks starts on the same date as set in the **Constraint Date** field, as long as it does not have dependencies with other child tasks.

When a parent task is set to Start ASAP and child tasks are set to Start on specific date:

- The earliest child task start date determines the start date of the parent, assuming no other dependencies.
- In this case, the **Time constraint** field of the parent remains **Start ASAP**, but the actual start date is changed to the start date of the earliest child task.

When a parent task is set to Start ASAP and child tasks are set to Start on specific date:

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Child precedence also applies to end dates. If the estimated end date of the child task is later than the end date of the parent task, the estimated end date extends to cover the child. For actual values, a parent has the same start date as the earliest start date of its children. The latest actual end date is the latest end date of its children. Assuming the child tasks are **Closed Complete**. If the child tasks are not in the **Closed Complete** state, the actual end date of the parent is empty.

For the planned start date of the parent task:

- The planned start date is the earliest planned start date of all the children that do not have an actual start date.
- If all child tasks have actual start dates, the planned start date of the parent task is set to the actual start date.

For the planned end date of the parent task: The latest planned end date or actual end date of the child tasks determines the planned end date of the parent.

A task with **Start no later than** or **Start on specific date** time constraint cannot be a parent task. When a new child task is added to a task with these time constraints, the time constraint for the parent task is changed to **Start ASAP**.

Parent-child rollup task calculations

Date changes, stage changes, and value calculations roll up from child tasks to parent tasks.

- Date changes involve modifying the planned start or end date of a parent task based on those values in child tasks.
- State changes involve modifying the state of the project record or parent task records when all child records are set to a certain state.
- Calculations involve summing the values of child tasks and then automatically updating the parent to reflect a new total.

The following fields change on rollup tasks:

- **Planned Start date**: Set to read only for parent tasks. Remains editable for the project record (also considered the top-level task).
- **Planned End Date**: Becomes read only.
- **Planned Duration**: Becomes read only.
- **Actual Start Date**: Becomes read only.
- **Actual end date**: Becomes read only.
- **State**: Becomes read only.

Duration Rollups

Rollups are calculated for the following items:

- **Planned duration and planned effort**: the sum of all planned duration and planned effort values for all child tasks.
- **Actual duration and actual effort**: the sum of all actual duration and actual effort values. Actual duration and actual effort values are calculated when all child tasks are in the **Closed Complete** state. Actual effort values can include rollups from time cards.

Note:
Verify that the time card property **com.snc.time_card.update.effort** is enabled. Navigate to **System Properties** > **All Properties** to enable this property.

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Cost Rollups

Cost calculations roll up when the costing add-on is active.

- **Estimated cost**: The sum of all cost estimates at the beginning of a project. Estimated costs of child tasks roll up to parent tasks and to the project.
- **Actual cost**: By default for the project, the sum of all costs of all the expense lines, and are typically associated with a time card and a labor rate. To track costs, you can derive rates using any of the following options:
  - Associate a rate model to the project.
  - Define rate cards for the task and labor expenses.
  - Associate rate at the resource plan level.

  These rates automatically generate expense lines showing actual expenditures, which are associated with the projects. If rate cards are defined, the task expense lines are generated as each project task closes, and labor expense lines are generated when time cards are approved. Expense lines are visible in the **Expense Lines** related list, which requires the **Advanced view** on both Project and Project Task forms.

To ensure actual costs of child tasks correctly roll up to the project and added to project expense lines, the following must be true:

- The `com.snc.project.rollup.cost` property must be set to **true**. To enable this property, navigate to **Project Administration** > **Settings** > **Preferences - Project** and select the **Enable project cost rollup** check box.
- The `glide.cost_mgmt.process_task_top_task` property must be set to false. Go to the costing properties in the Cost Management application. Check the **When creating a task expense line should the system also create expense lines for the task's top task box** is not checked.
- The `glide.cost_mgmt.calc_actual_cost` property must be set to true. Go to the costing properties in the Cost Management application. Check the **For planned tasks types, calculate the actual cost field using the total of expense lines for the task** box.

Project State Rollups and Roll Downs

Project task states roll up. The state of parent tasks becomes read only, and changes automatically when you change the states of child tasks.

Project task states can roll up if:

- The state of the child task is manually changed and there are no other conditions on the parent task.
- The state of the child task is changed to **Work in Progress** or **Closed**. These states roll up to the parent. **Pending** and **Open** do not roll up to the parent task.

Project states can also roll down. If you change the state of a project to closed, all tasks under it change to the default closed value (**Closed Complete**). If a closed project or closed task is reopened, all tasks under it change as follows:

- Project or parent changed from closed to **Pending** or **Open**: Child tasks change to **Open**.
- Project or parent changed from closed to **Work in Progress**:
  - Child tasks with a **Start on** date that has passed are changed to start **ASAP** and the state is changed to **Work in Progress**.
  - Child tasks with a **Start on** date that has not yet passed retain the same start on date but the state is changed to **Open**.

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Enable cost rollup calculations

Enable rollup calculations from the project properties.

Before you begin

Role required: it_project_manager

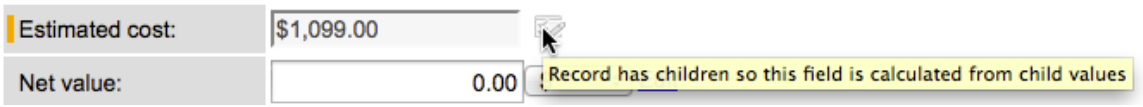
Procedure

1. Navigate to **All** > **Project** > **Settings** > **Preferences**.
2. Select **Enable project cost rollup**.
3. Click **Save**.

Result

Rollup values are read-only on forms. Point to the icon beside the field for a tooltip message.

Tooltip



Scheduling conflicts between project tasks

Scheduling conflict helps you to identify project tasks that are not honoring dependencies. A scheduling conflict occurs when one project task prevents other task from starting on the specified date because of dependencies or constraint types.

A scheduling conflict occurs when any action such as applying a dependency, changing constraint type, or constraint date causes the task start date to violate the project's constraint date.

When a scheduling conflict occurs, the system warns you about the conflict. You can choose to cancel the action that is causing the conflict or continue with the conflict. If you choose to continue with the conflict, the constraint date is given highest precedence and dates are recalculated. The start date is moved till allowed by the task constraint date, but dependency is not honored.

For example, consider the following scenario:

For a project with project task's **Constraint date** set as 20 January, there are two tasks:

- T1 with constraint type set to As soon as possible and start date of 20 January.
- T2 with constraint type set to Start no later than and start date of 20 January.

If you add an FS dependency between tasks T1 and T2, the task T2 should start on 21 January, but due to Start no later than constraint, task T2 cannot start on 21 January. This inability of starting task T2 on the specified date is an example of conflict.

In this example, if you choose to proceed with the conflict, the start date of task T2 is moved to 20 January which is the constraint date.

Scheduling conflict between tasks is shown for tasks with **Start no later than** and **Start on specific date** time constraints.

If you want the task to honor the dependency and adjust the start accordingly, change the constraint type of the task to **Start ASAP**.

When a scheduling conflict is identified, you can identify such tasks in the planning console.

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- The client-side planning console displays a pop-up message with an option to proceed with the conflict or cancel the action. If you proceed with the conflict, the constraint type is applied or date is changed appropriately to the next feasible date.
- The calendar icon () on the client side planning console changes to red () to indicate the conflict.
- The calendar icon on the server side planning console changes to red () to indicate the conflict.

Create a project task

You can create project tasks in various ways, even from other applications in the instance.

Before you begin

Role required: it_project_manager

About this task

You can create a project task using any of the following options.

Procedure

- Use the Project Tasks related list.
  This related list is available from both a project record and a project task record. You can use the **New** UI action or insert a new row in the related list.
- Use the planning console.
- Use the project task creator.
  Use a dialog box to create multiple tasks at one time. The project task creator is available from both a project record and a project task record.
- By copying an existing project or task.
  This option copies a selected task, or even a whole project, including all child tasks.
- From an incident, problem, or change request.
  The Project Task related list is also available from the Incident, Problem, and Change Request forms. The tasks you create from these forms makes the project task a child of the incident, problem, or change, rather than a project.

Create a project task from a project

Create tasks from the Project form. The fields appear when the Project Portfolio Management is active and the Project form is in the **Basic** view. Configure the form to display the fields.

Before you begin

Role required: it_project_manager

Procedure

1. Navigate to **Project** > **Projects** > **All**.
2. Select the project from the list.
3. In the **Project Tasks** related list, click **New**.
4. On the form, fill in the fields.

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Project Task form

Field	Description
Short description	Brief description of the project task.
Number	System-generated number with a configurable prefix.
Status	Status of the project task. The status updates automatically based on the difference of the planned end date of the task from the current date. The color of the status changes as the planned end date approaches: ○ **Green**: The planned end date for the project task is more than the offset working days that you defined. ○ **Yellow**: The planned end date for the project task is less than the offset working days that you defined. ○ **Red**: The planned end date for the project task is past the offset working days that you defined. The default offset for status calculation is 3 working days. You can update the *com.snc.ppm.yellow_status_duration* property to change the offset duration. Your project schedule determines the working days. **Important:** The status of the project task does not affect the overall status of the project, meaning the project task status does not roll up to the project. Also, the status of the child tasks does not affect the status of the parent task. Execute the *Update Active Project Task Status* scheduled job to update the status of your existing tasks. This scheduled job runs daily by default, however you can execute this job on demand also. If you do not want the status of a task to update automatically, you can change the status of the task manually. Changing the status manually, overrides the automatic update and the execution of the scheduled job does not change the status of the project task. **Note:** Configure the property *com.snc.status_process_planned_task_entities* to include or exclude task types for automatic status updates.
Override status	Indicates if the project task status is updated manually. By default, this check box is deselected. When you change the **Status** field manually, this check box becomes selected.
State	Current state of the project. The states include: *Pending*, *Open*, *Work in Progress*, *Closed Complete*, *Closed Incomplete*, *Closed Skipped*. The state is automatically rolled up from the project tasks. For more information, see Project calculation and Parent-child rollup task calculations.
Description	Detailed description of the project task.

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Field	Description
Assigned to	User assigned to the project task. The following conditions apply: ○ If an assignment group is defined, only users in the assignment group appear in the lookup list. ○ If skills are defined, only users with those skills appear in the lookup list. ○ If no assignment groups or skills are defined, only users with one of the Project Management application user roles appear in the lookup list. ○ Users with `timecard_user` role also appear in the lookup list.
Assignment group	User group assigned to the project task.
Additional assignee list	Additional users assigned to the project task.
Percent complete	Percentage of the work that has been completed for the project task.

Details tab

Field	Description
Milestone	Option for converting the task to a milestone.
Key milestone	Option for converting the task to a key milestone.
Allow dates outside schedule	Indicates whether the project task is set to start and end on a non-schedule day (outside regular project schedule) such as on a weekend. An off-schedule task can start any time during the day and on any day of the week. For example, if you use the project schedule Monday to Friday, 8:00 to 17:00 and a project task of duration 2 days should start on Saturday, then an off-schedule task is allowed to be scheduled on Saturday and end on Sunday. Similarly, if a task of duration 3 days starts on Friday, then an off-schedule will end on Sunday instead of ending on Tuesday. The option is not enabled for a parent task. The value of this field on the parent task is derived from the child tasks.

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Field	Description
	Note: ○ There is no difference between an off-schedule and an on-schedule task if there is no schedule defined at the project. ○ 1 day is 8 hours for a task in regular schedule and 24 hours for a task outside schedule.

Dates tab

Field	Description
Planned start date	Estimated date and time for the project task to start. You can edit this date when the **Time constraint** is **Start on Specific Date**, **Start no earlier than**, or **Start no later than**. If the constraint type is **Start ASAP** or **Start no later than**, changing the planned start date for a task changes the constraint type to **Start no earlier than**.
Planned end date	Estimated date and time for the project task to end. For a manual project, any update to the actual start date does not update the planned end date of the project task. Enable the project property **Enable alter of planned date with Actual for Manual Project** to update planned end date from the actual start date and planned duration.
Planned duration	Estimated length of time (from start time to end time) of the project task.
Planned effort	Estimate of how much time it will take to complete this task. After you add child tasks, this field becomes read-only, rolls-up calculation and overwrites any earlier entry that you made.
Constraint date	A read-only field that determines the start date for tasks with **Start no earlier than**, **Start no later than**, and **Start on specific date** constraints. Use the **Move project** related link to change this date. For more information, see Change the planned start date of a project.
Original start date	Original planned date and time for the task to start.

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Field	Description
Actual start date	Date on which the project task started. The task is set to **Work in Progress** when the actual start date is populated. When you change the **State** or **Percent complete** of the task, the actual dates are auto-populated with the date component copied from the planned dates. When you populate the actual start and end dates, the time component in actual dates is defaulted to the date component in planned dates when the **Derive time component from planned dates** field on Project form is set to True.
Actual end date	Date on which the project task ended. The task is set to **Closed Complete** when the actual end date is populated.
Actual duration	Duration of the task from task start to task closure. As with planned duration, the actual duration shows total task time.
Actual effort	Actual number of hours charged from the resources on this project task. If you are using the Time Card Management application, the value for the field comes from the application automatically. The application calculates the actual effort on the task by taking the total time worked from all approved time cards of all resources who worked on the task.
Time constraint	When the project task begins: ○ **Start ASAP**: The task starts as soon as possible as determined by the relationships and dependencies. The dates for these tasks are derived from the constraint date of the project. ○ **Start on specific date**: The task starts on a date that you specify. The task dependencies are not considered for date calculation. ○ **Start no earlier than**: The task starts on or after the constraint date. ○ **Start no later than**: The task starts on or before the constraint date. The start date is determined by the relationships and dependencies.

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Field	Description
	Note: If the **Calculation** field on the Project form is set to Manual, you cannot change the constraint type for such projects. To change the constraint type, change the project to Automatic.
Original end date	Original planned date and time for the task to end.

Notes tab

Field	Description
Activity / Work notes / Additional comments	Information about the milestones, impediments, or changes as the project progresses. Enter notes or comments in the **Activity** field and click **Additional comments** or **Work notes**. The text appears in the feed.

Checklist tab

Field	Description
Checklist	Checklist to track items that must be completed for the task.

5. Click **Submit**.

Result

The new task appears in the **Project Task** related list on the Project form. If time cards are in use, the application creates a time card for the resource.

What to do next

The value in the **Percent complete** field is related to the **State** field in the v3 application. If you change the percentage complete from **0** to any other value, the state of the task changes to **Work in progress** when you save or update the record. Likewise, if you change the state of the task to **Closed complete**, the **Percent complete** field is set to **100** and becomes read-only.

If you change the state of a project task from **Work in progress** to **Closed Skipped** or **Closed Incomplete**, the **Percent complete** field retains the current value and becomes read-only.

The **Percent complete** field appears in the Gantt chart for parent tasks as a light-colored bar (the part of the task that is complete). The bar overlaps the darker, underlying bar (the full task). For example, a Demo project is 5.41% complete as shown in a pop-up window. The **Phase 1** task is about 50% complete (not shown in the pop-up window).

The Project Tasks list and the Project Tasks related list on the Project form include a **Dependency** field. Any dependencies for a task, such as a parent task, are displayed in this field. Click a dependency record. See Predecessor dependencies in the planning console for a description of what you see in this column.

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Create a task from an incident, problem, or change request

You can create a new project task from the Project Task related list on the Incident, Problem, and Change Request forms. The tasks you create from these forms makes the project task a child of the incident, problem, or change, rather than a project.

Before you begin
Role required: it_project_manager

Procedure

1. Navigate to the Incident, Problem, or Change Request form.
2. Configure the form to add **Project Task** > **Parent** if the related list is not already present.
3. In the **Projects** related list, click **New**.
4. Fill in the project form.

   The project task becomes a child task of the incident, problem, or change record.

Create tasks from project task creator

Use the project task creator to create multiple tasks at once.

Before you begin
Role required: it_project_manager

Procedure

1. In the Project form, right-click the header bar and select **Project task creator**.
2. Enter the number of tasks to create.
3. Select the **Create FS dependency** check box to create a finish-to-start dependency between these tasks (when the first task finishes, the next task starts).
   Clear the check box to create the tasks with no dependencies.
4. Click **OK**.
   The new tasks appear in the **Project Tasks** related list. The application automatically creates a task **Number** and a **Short Description** that starts with **Auto Created Task**, followed by a number when more than one task is created.

Insert a row into the project tasks list

You can create a new project task from the Project Task related list on the Project form. Administrators must enable this task-creation feature.

Before you begin
Role required: it_project_manager

Procedure

1. In the Project form, navigate to the Project Tasks related list.
2. Double-click **Insert a new row**.
3. Click the green check mark.
4. Open the new task and edit the record as required.

Copy an existing task or project

Save time when building a project by copying tasks from other projects.

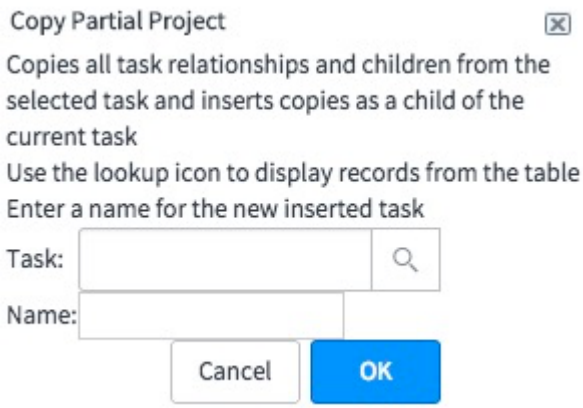
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Before you begin
Role required: it_project_manager

About this task
The **Copy partial project** option copies a selected task and its child tasks into the project, or all project tasks into a sub-project. It also preserves all dependencies and relationships among the copied tasks and their child tasks. Any relationships or dependencies that involve tasks outside of the scope of the copied task are not preserved.

Procedure
1. In the Project or Project Task form, right-click the header bar and select **Copy partial project**.
2. In the **Task** field, select a project task or project to copy.
   By default, projects begin with PRJ and project tasks begin with PRJTASK.
3. Enter a **Name** for the new project or task.
4. Click **OK**.

   The copied task is added to the current task or project. If a project was copied, then all the tasks are inserted into a new sub-project.



Result
The copied tasks are inserted as a child of whatever task or project that you are currently viewing. Actual duration and the actual start and end dates are reset to null values. The state is set to **New** and percent complete is set to **0**.

By default only the short description, planned dates and duration fields are copied from source project to the target project. If additional columns must be copied, they should be declared in the project property **List of attributes that will be copied from the originating project task**.

Change default values of copied fields

Change the default values of in the new partial project.

Before you begin
Role required: admin

About this task
Actual duration and the actual start and end dates are reset to null values. The state is set to **New** and percent complete is set to **0**. Administrators can modify UI pages to determine which fields are reset or to change the default values.

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Procedure

1. Navigate to **All** > **System UI** > **UI Pages**.
2. Open the copy_partial_project record.
3. Use the following script if in the **Processing script** field:

```
/* resetFields is the array containing the list of names of
 fields that need to be erased from the copied project tasks
    * defaultFields is the array containing the key, value
 pairs of field names and values that need to be set on the
 copied tasks
    */var resetFields =new Array();var defaultFields ={};
  resetFields.push("work_start","work_end","work_duration");
  defaultFields["state"]="-5";
  defaultFields["percent_complete"]="0";
```

Create a task from a project task template

You can save a project task as a template and reuse it when creating a task.

Before you begin

Role required: it_project_manager
You must have a template from an existing project task that has the required field values. See Templates for more information on this platform feature.

Procedure

1. Navigate to **Project** > **Tasks** > **All**.
2. Click **New**.
3. If the templates do not appear at the bottom, click the ellipsis (•••) icon at the top of the form, and select **Toggle Template Bar**.
4. Click the template link in the template bar at the bottom of the form.



The template is applied to the project.

Create a milestone

A milestone is a project task with a duration of zero (0). Use milestones to mark key dates in your project, such as key decision points, approvals, and holidays. Milestones are treated like any other project task and you can create dependencies between tasks and milestones.

Before you begin

Role required: it_project_manager

About this task

Note:
Milestones cannot be shared between projects unless one project is nested under another project.

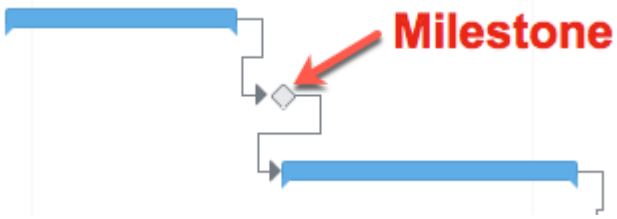
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Procedure

1. Create a project task and give the **Duration** field a value of **0**.
2. Open the planning console Gantt chart and verify that it appears as a diamond.
   You can also convert a task to milestone through Planning console tasks.

Result

Milestone



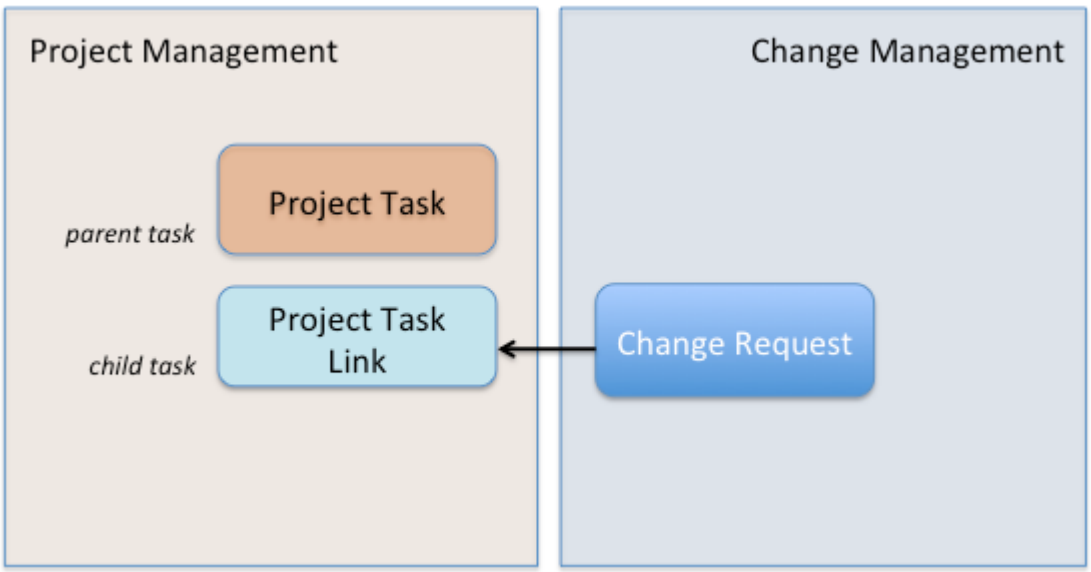
Change requests and project tasks

Large-scale changes approved by your change approval board (CAB) require new or existing projects to be implemented.

To bridge the gap between change management and project management, the instance allows you to link one or more change requests to a project task. You can link an existing change request to a project task or create a new change request directly from a project task.

When you link a project task to a change request record, a new project task link record is created. It provides the actual link between the project task record and the change request record. The project task link copies all attributes of the change request record. It then becomes a child task of the project task that you linked to the change request. The rules that govern the relationship between the project task and the project task link are the same as the rules for all parent and child tasks.

Project tasks linked to change requests

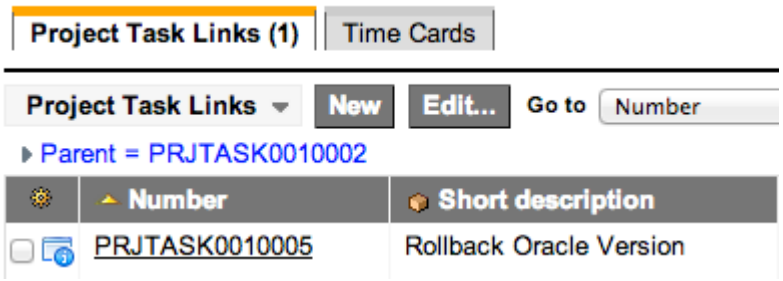


Note:
A project task cannot have both task link records and child project tasks. When a project task is linked to a change request, you cannot also create child tasks for that project task. Likewise, when a project task has child tasks, you cannot link the parent project task to a change record.

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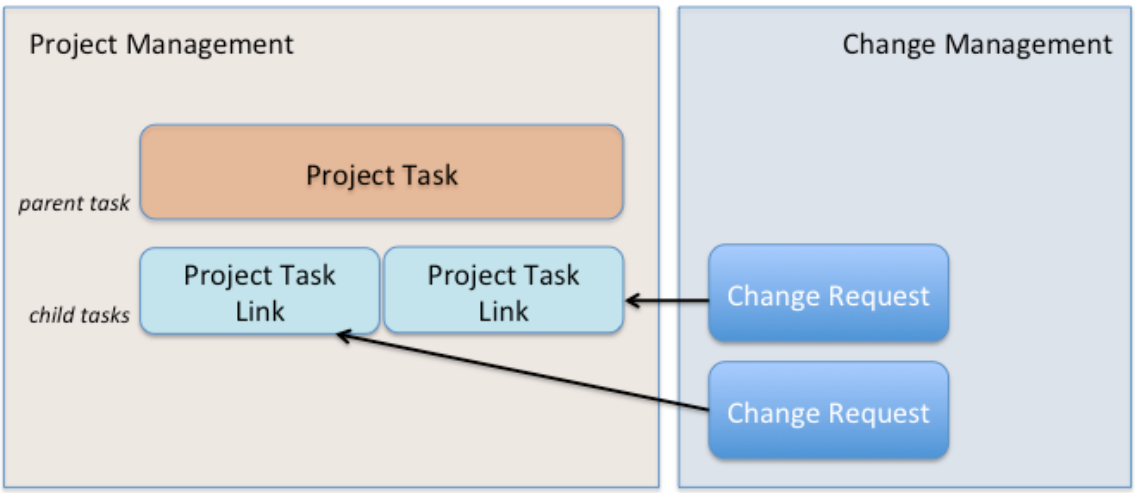
The project task link record is read only. You can view the project task links from a related list on the Project Task form.

Project Tasks Links related list



You can also link multiple change requests to a single project task. In this case, a project task link record is created for each link and all the project task link records become child tasks of the project task.

Project tasks links



Change request project task relationship

The rules that apply to all parent-child tasks also govern the relationship between project task and the project task link.

Start and end dates

The project task link inherits start and end dates from the change request. However, the Project Management application adjusts the dates when these situations occur:

- If the project task and the change request have different planned start dates, the project task link uses the later of the two dates. For example, if the project task starts on October 1 but the change request starts on October 2, the project task link changes to October 2.
- If the change request has an earlier start date, the **Time constraint** value for the project task link becomes **Start ASAP** when the link is created. The end date remains the same as the end date specified in the change request record.
- If the change request starts and ends before the project start date, the project task link has a duration of zero (0). It also appears as a milestone that occurs when the project starts.
- If a change request is scheduled to start during non-work time according to the project schedule, the planned start date of the project task link ignores the schedule. It also starts at the time specified by the change request. However, the duration of the project task link does take the schedule into consideration. For example: the project uses the default schedule,

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which specifies that work hours are Monday to Friday from 08:00 to 17:00 with an hour break from noon to 13:00. A change request with a 13-hour duration starts at midnight. The project task link starts at midnight and continues through the start of the schedule at 08:00. It stops at noon for one hour, and continues from 13:00 until 14:00. The total duration would be 13 hours.

Project Task Duration

The duration of the change request determines the duration of the project task link. That duration is rolled up to the parent project task just as all child task durations roll up to parent tasks. The **Planned start date** and **Planned end date** in the Change Request form **Schedule** section are the fields that determine the duration. If there are no planned dates on the Change Request form, the default duration is one project day. The project has a schedule or 24 hours when the project has no schedule.

Multiple Linked Change Requests

If you link additional change requests to a project task, additional project task links are created. All become child tasks of the project task. The dates roll up to the parent task. For example, if a linked project task is planned to finish on October 30. You link a new change request scheduled to finish on November 30, a new project task link is created. The parent task planned end date extends to November 30 to cover the duration of both project task links. A change request can only be linked to one project task. It cannot be linked to multiple tasks in the same project or across multiple projects. A project task that has one or more child tasks cannot also have a project task link connecting it to a change request.

Project Task State

If the state of a change request changes to **Pending**, **Open**, or **Work in Progress**, the state of the project task link changes accordingly. If the state of the change request changes to any of the closed states, the state of the project task link changes to **Closed Complete**.

How Modifications Propagate Between Change Requests and Project Tasks

Modifications to a linked change request propagate to the project task link. However, the reverse is not true. You cannot modify the change request record from the Project Management application.

Modifications to the following fields propagate from the change request to the project task link:

- **Planned start date**
- **Planned end date**
- **State**

These change request settings also roll up to the project task that is the parent of the project task link, and also up to the project record. Consider the following example: a project has not yet been started and all its tasks are in the **Pending** state. If you changed the state of a linked change request record from **Open** to **Work in Progress**, the project task link, its parent task, and the project itself all change to **Work in Progress**.

When you start a project, tasks that have **Start ASAP** as the time constraint and have no other start dependencies start immediately. However, project tasks with linked change requests do not start automatically. The project manager must start the task manually by changing the **State** field to **Work in Progress**.

Modifications made in the Project Management application do not propagate to a linked change request record, so closing a project does not close a linked change. When you successfully implement a change and close the project it belongs to, you must go to the change request record and manually change the state to **Closed**.

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Link change requests to a project task

Link change requests to tasks on the Project Task form. You can link change requests only to project tasks that have no child tasks.

Before you begin

Role required: it_project_manager

About this task

You can link any change request record to a project task, regardless of the change request schedule or state. However, as a good practice, consider:

- **Change Schedule:** The change request has a schedule that falls within the time frame of the project it links to. Or, it has no values in the **Planned start date** and **Planned end date** fields in the **Schedule** section of the Change Request form.
- **Change State:** An **Open** or **Pending** state is required when linking a change request. Changes that are already in progress or closed can be stopped and copied to a new change request.

Procedure

1. Open a project task that does not have any child tasks.
   Tasks that already have child tasks cannot be linked to change requests.
2. Click one of the following related links:
   - **Link an Existing Change Request to Project Task**:

     In the dialog box that appears, enter or select the change that you want to link.
   - **Create Change and link from Project Task**:

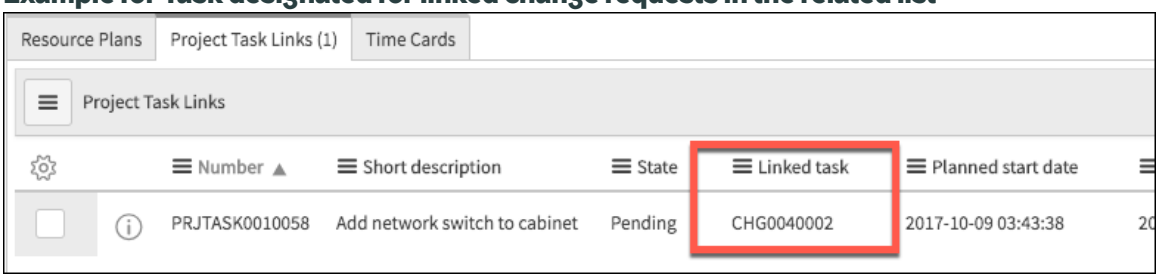
     The Change Request form appears. Enter the information in the form. The short description of the change request is taken from the project task.

Note:
These related links are available only when the project task type is waterfall.

Result

On the Project Task form, a notification appears at the top specifying that the task is linked to one or more change requests.

Example for Task designated for linked change requests in the related list



Project task checklists

A project task checklist gives you the ability to track activities that must be completed on a task.

For a project task to be considered complete, you can track activities that do not require separate subtasks. For example, you have a human resources-related project that includes a task for interviewing candidates. You can also track booking a meeting room or getting an interview confirmation from the candidate. Create a checklist item for each and mark when they have been completed.

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Checklist items do not have start or end dates, nor do they track effort or cost. By default, a checklist item record provides only a name and a **Complete** field, which can be set to true or false. The state of the project task is independent of the state of the **Complete** field on the checklist item.

Checklists, as well as tasks, are copied into a project template. You also have access to all checklist templates from any project task form.

Note:
Checklists are available for any form that is based on a table extended from the Task table. Administrators can add or remove checklists as needed.

Use a project task checklist

You can create a checklist in a project task to track items that must be completed in the task.

Before you begin
Role required: it_project_user, it_project_manager

Procedure

1. Navigate to a project task.
2. To create a checklist for the project task, click **Create new** in the **Checklist** section and specify a name for the checklist.
3. To remove a checklist from the project task, click the down arrow next to **Checklist** and select **Remove Checklist**.
4. **Note:**
   This option appears when there is at least one checklist in the **Checklist** section.

   To save a checklist as a template, click the down arrow next to **Checklist** and select **Save as Template**.

Save a checklist as a template

After you create a checklist on a project task, you can save it as a template and reuse it on other tasks.

Before you begin
Role required: it_project_manager

Procedure

1. Navigate to a project task.
2. Click the down arrow next to **Checklist**.
3. Select **Save as Template**.
4. Enter a name for the checklist.
5. Click **Save**.

Accept or reject project task notifications

Approve or reject the changes in a notification for an external soft dependency.

Before you begin
Role required: it_project_manager

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About this task

The **Notifications** related list on the project record lists the external dependency related notifications raised in the successor project. The notifications are triggered as a result of changes made in the predecessor project that can impact successor project or task.

- The notifications for the hard dependency have the**State** set to Processed by default.
- The notifications for the soft dependency have the **State** set to New by default. As the project manager of the successor project, you can choose to accept or reject the changes in the notification.

Procedure

1. Open the project form.
2. Click the **Notifications** related list.
3. Click the reference icon ⓘ to open the project task notification record for an external soft dependency.
4. Click **Approve** or **Reject**.

Result

- The **Status** of the notification record changes to Accept or Reject.
- The **State** of the notification record changes to Processed.

Task resources

Resources are the individuals or groups assigned to perform tasks and subtasks in Project Management.

You can use Resource Management to set up resource plans, which can be associated with projects. Activate Project Portfolio Management to use Resource Management with Project Management.

Related topics

Resource Management classic

External dependencies

As a project manager, you can use an external dependency to set up a dependency from a task in one project to a task in another project.

External dependencies help you to see the impact of changes in project schedules when a predecessor project changes.

How external dependencies work

To define the external dependency, select a project task from the predecessor project to be linked to the task in the successor project. When an external dependency is added, the system adds shadow tasks in both the successor and predecessor projects.

A shadow task is a read-only task in the respective project. It has the database attribute **shadow** set to true and **orig_sys_id** pointing to the **sys_id** of its original task. The shadow task is kept in sync with its original task whenever the relations are processed.

In addition to the shadow tasks, two shadow relations are also added in the planned_task_rel_planned_task table. These relations are shadows of the original relations.

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For example, for two projects, project P1 is the predecessor project, and P2 is the successor project. Project P1 has a task T1, and project P2 has a task T2.

If an external dependency is created from T1 to T2, the following tasks are added in the two projects:

Project	Task
P1	Shadow of T2
P2	Shadow of T1

After adding the external dependency, the following shadow relation records are created in the planned_task_rel_planned_task table:

Parent	Child	Project	External
T1	T2		True
Shadow of T1	T2	P2	False
T1	Shadow of T2	P1	False

Where:

- `Parent` is the predecessor project.
- `Child` is the successor project.
- `Project` is the project where the relation is seen.
- `External` is the external dependency.

Types of external dependencies

The Project management application supports two types of external dependencies - hard and soft.

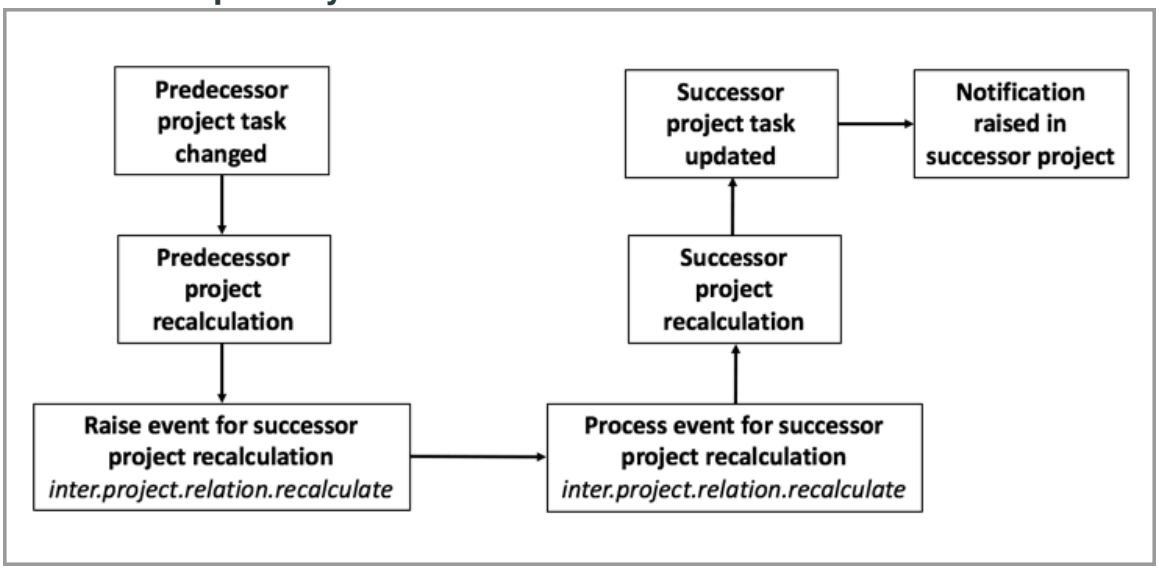
The type of external dependency can be set during adding a dependency between two projects tasks on the planning console.

Hard dependencies

In a hard dependency, any changes made in the predecessor project are automatically propagated to the successor project. A notification for the changes made is triggered in the successor project. The following image shows the process flow for a hard dependency type:

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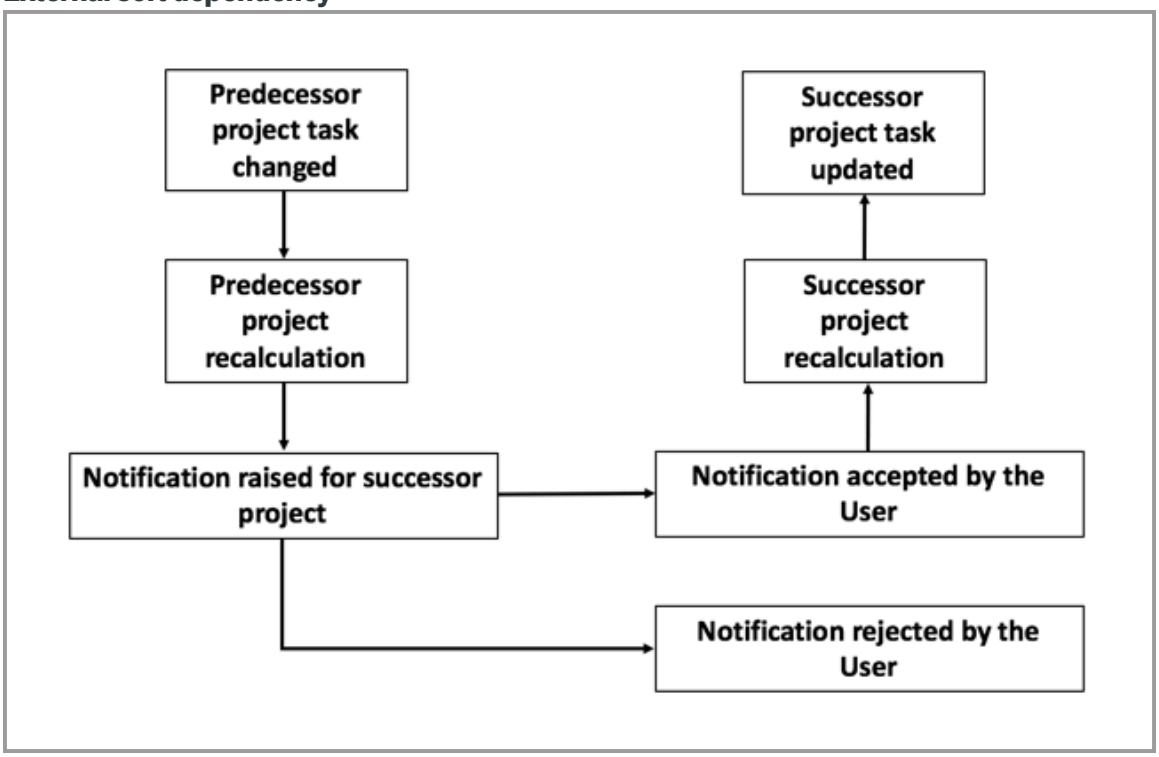
External hard dependency



Soft dependencies

In a soft dependency, any changes made in the predecessor project trigger a notification in the successor project. As the project manager of the successor project, you can choose to accept or reject the changes in the notification. If you accept the notification changes, the changes in the predecessor project are synced to the successor project and the project is recalculated. If you reject the notification changes, the changes are not propagated to the successor project. The following image shows the process flow for a soft dependency type:

External soft dependency



Add an external dependency on planning console

Add an external dependency between two projects on the planning console. Use the work breakdown structure (WBS) column of the planning console to create a dependency between the different projects tasks.

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Before you begin
Role required: it_project_manager

Procedure
1. Right-click a task in the WBS column of the planning console.
2. Click **Add External Dependency**.
3. On the form, fill in the fields.

Add Dependency form

Field	Description
Project	The predecessor project that the dependency is added from.
Task	The task in the predecessor project that the dependency is added from.
Dependency Type	The type of external dependency: **Hard** or **Soft**.

4. Click **OK**.

Result
- A shadow task corresponding to the predecessor task appears in the WBS section of the planning console of the successor project. A similar shadow task corresponding to the successor task appears in the WBS section of the planning console of the predecessor project.

  A shadow task is shown as a grayed out task in WBS column.

- A shadow task corresponding to the predecessor task appears in the **Project Tasks** related list on the successor project form. A similar shadow task for the successor task appears in the **Project Tasks** related list on the predecessor project form.
- The **Dependency** column in WBS column of the planning console of the successor project shows the external dependency value between the projects and tasks. The external dependency value has the following format:

  `{project_number}\{WBS_number}{dependency_type}+{lag_time}`

  Where
  - `project_number` is the number of the predecessor project.
  - `WBS_number` is the number of the predecessor task in the relationship.
  - `dependency_type` is the **finish to start** dependency type that the application supports.
  - `lag_time` is the amount of time, in days, to delay the start of the dependent task. This value can be positive or negative integers.

Note:
The external dependencies are displayed only when the **Hide External Dependencies** switch on the planning console is turned off. However, the **Dependency** column in the WBS section of the successor project still shows the value of the external dependency.

Example:
In the example below, an external dependency is created between two projects P1 and P2. P1T1 is a shadow task of predecessor project P1, and PRJ0010127\1fs+0 is the external dependency value in **the Dependency** column of the planning console of the successor project P2.

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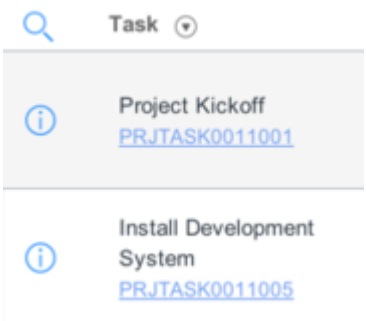
What to do next
Check for any external dependency related notifications that may impact the project or its tasks.

Composite Fields

A composite field combines information from two fields in a table to form a single field.

For example, the **Task** field on the Project Tasks list displays the short description and the project task number. The short description appears above the project task number. The project task number appears and is a link to the Project Task form.

Composite field



Use a composite field

- Editing a composite field changes the short description. Editing the short description changes the composite field.
- Sorting on a composite field is based only on the short description and not the number.
- Searching on a composite field is enabled for both the short description and the number:
  - To search by the number using the list header, enter an asterisk (*) before the search term. For example, *PRJTASK0010016.
  - To search by the number using the filter, create a condition similar to: [Task] [contains] [PRJTASK0010016].

Start a project

Starting a project is the next step after setting up the project, populating it with tasks, and assigning resources.

Before you begin
Role required: it_project_manager

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Procedure

1. Open the project you want to start.
2. Change the **State** field to **Work in Progress** and click **Save** to save the change.

> **Note:**
> You can not restart a project (changing the state to Work in Progress) or reopen it after it is closed. Updating the project state from Closed to Work In Progress, Pending, or Open is not allowed. Instead of reopening the project, reopen an existing project task or add a new task to the project. This moves the project from Closed to Work in Progress state without affecting the other closed tasks.

Result

After you start the project:

- The read-only **Actual start date** field of the project is populated with the planned date.
- If a task or set of tasks are scheduled to start immediately upon project start (meaning that their time constraints are set to **Start ASAP** and they have no other start dependencies), the actual start dates of those tasks also get populated with the planned date.
- The planned start dates of all other tasks adjust accordingly based on the time you started the project. Their new planned start dates depend on several factors, including dependent relationships with other tasks and the duration for each task.

> **Note:**
> Once a project is in the **Work in Progress** state, it does not mean that the state of every task will start updating automatically based on planned start date. Other than the project tasks that you schedule to start **ASAP** when the project starts, project tasks are not started automatically. Continue to manage the project and change the state of each task to **Work in Progress**.

Update a project in progress

While a project is underway, keep actual values as current as possible. Continue to measure actual values, analyze the impact of any potential project risks, and make adjustments to handle scope, cost, and schedule accordingly.

Before you begin

Role required: it_project_manager

Procedure

1. Open a project in the **Work in Progress** state.
2. Keep the following fields up to date:
   While the status of the project is **Work in Progress**, keep these fields up to date:
   - **Priority**: the priority of the project, especially as it relates to other projects in the portfolio.
   - **Net value**: the value of the project to the company expressed in expected revenue.
   - **Risk cost**: the sum of all costs involved with potential project risks. Although this field is not related to cost management, you can use this field to estimate the costs of risks that arise during the project.
   - **Configuration item**: the CI related to the project.
   - **Schedule**: the type of work schedule.
   - **Work notes**: a useful record of notes and comments related to the project.
   - **Live feed**: a record of the collaboration between various project stakeholders.

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For project tasks, keep these fields up to date:

- **State**: remember to change project task states to **Work in Progress** when the task should begin (for tasks that have a specified start date) and **Closed** when the task is finished. Task states do not change automatically except when the time constraint of the task is set to **Start ASAP** and the state of the predecessor task is changed to one of the closed states.
- **Assignment group**: the group of resources currently working on the task.
- **Assigned to**: the individual assigned to the task.
- **Time cards**: the amount of time resources work on a project, which roll up into **Actual effort**. If a labor rate is configured for a time card, changes to the time cards affect the**Actual cost** of the project.

3. Click **Update** to save the record.

Track project comments and collaborate with stakeholders

When a project is in progress, you can take advantage of two platform features that help project participants interact and collaborate: journal fields and live feed. Two useful journal fields are Comments and Work notes.

Before you begin

Role required: it_project_manager

Procedure

- To add journal fields to a project form:
  1. Configure any project form to show **Comments** and **Work notes** .
- To add live feed to a project form:
  1. Navigate to **System Definition** > **Dictionary**.
  2. Click the **pm_project** table name that has no corresponding **Column name**.
  3. In the **Attributes** field, enter `live_feed=true`.
  4. Click **Update**.
  5. Navigate to **System Definition** > **UI Actions**.
  6. Open the **Follow on Live Feed** list action.
  7. In the **Table** field, select the [pm_project] table.
  8. Right-click the header and select **Insert** to create a copy of the UI action for the [pm_project] table.
  9. Repeat the steps for the UI actions for the **Show Live Feed** form action.
  10. Personalize the Project form and add **Activities (filtered)**, which is the activity formatter, to the desired location on the Project form.

Planning console

The planning console is a centralized interface for the Project Management application.

The planning console gives project managers a comprehensive view of all aspects of a project, including a hierarchical list of sub-projects, if any, project tasks that appear in a work breakdown structure (WBS) list, and the project Gantt chart. The console also integrates with Live Feed so your users can collaborate on projects.

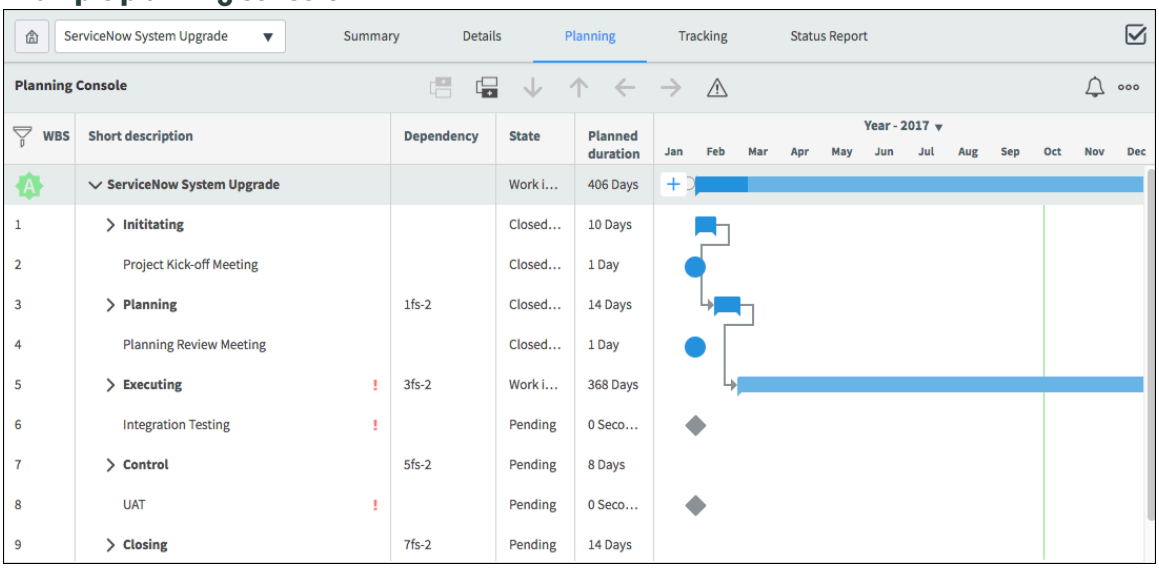
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Sections in the planning console

The planning console is divided into the following sections:

- A list of the project tasks if you open the planning console for a project.
- The Gantt chart.
- Banner icons and lists for performing tasks on the console.

Example planning console



For more information on the Gantt chart and the task relationships and dependencies that you can build, see Gantt chart and Project task relationships and dependencies.

Note:
The resources in the **Assigned to** column of the planning console can be constrained to be derived only from the allocated resource plans associated to the project or any of its tasks. The **Derive assignee list from resource plan** field controls the behavior on the project form.

Business rules

By default, the business rules are not triggered during an operation in the planning console. You can enable the business rules using *`Enable firing of Business Rules`* property.

Note:
To enable this property, you must clear the **Enable Client Side Planning** check box.

You can also enable business rules when defining the columns for planning console using the **Fire BR on Save** field.

Client side planning console

Build your project structure quickly on the client side without having to save details in the server for each interaction in planning console. Enabling **Client side planning console** prevents any time lags that occur after you perform any actions in planning console, and improves the scheduling performance.

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Automatic and manual projects

In an **automatic** project, any change to the dates, duration, or relationships of a project task automatically updates all the tasks in the entire project, including the project record, as necessary. The automatic project icon ( ) appears adjacent to the project name.

In a **manual** project, changes to the dates, duration, or relationships of a project task do not automatically update all tasks. So parent task dates do not reflect any changes made to dependents or child tasks. The only change that is made automatically is when a task date or duration change updates dates and duration of the project record. In a manual project, any update to actual start date does not update the planned end date of the project or project task. However, enabling the project property **Enable alter of planned date with Actual for Manual Project** updates the planned end date from actual start date and planned duration. The manual project icon ( ) appears adjacent to the project name.

You can specify if a project is automatic or manual in the **Calculation** field on the Project form. This field becomes read-only when the project starts.

Tutorial

A tutorial walk through is available in the console. It shows you all the features of the console and how to use them. Access the walk through within the help icon ( ).

Open the project planning console

Access the planning console to perform the planning for the project.

Before you begin

Role required: it_project_manager

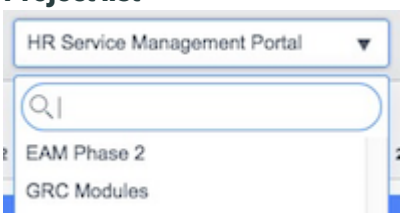
Procedure

Open the planning console using any of the following methods.

Planning console tasks

You can perform several tasks on the planning console that you can perform on lists and forms, such as creating project tasks and copying projects. You can also perform several tasks unique to the console.

General console settings tasks

Task	How to perform the task
Display a project in the planning console	Select the project from the list in the project workspace banner. **Project list** 

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WBS hierarchy tasks

Task	How to perform the task
Create a project task	Click the add task below icon () on the row to create a new task. You can also click an existing task to determine the insertion point for the new task, and then click the add task above icon () or the add task below icon ().
Move a task up or down in the hierarchy	Click an existing task, and then click the move up (↑) or move down (↓) icons.
Indent or unindent a task in the hierarchy	Click an existing task, and then click the unindent (←) or indent (→) icons.
Edit a task record	Right-click a task and select **Edit**. The Project Task form appears in the overlay. You can also edit a field directly in one of the columns in the planning console. You can also edit project tasks that represent phases in the project workbench.
Edit the **State** field	Double-click the value in the **State** column to select a new state. The value of the **State** field also changes automatically when % complete is changed for a task.
View and modify task status	View the status of the project task based on the difference of the planned end date of the task from the current date. The status of the task updates automatically from Green to Yellow to Red as the planned end date approaches. You can manually update the task status by double-clicking the **Status** column and selecting a different task status. For more information, see **Status** field description in the Create a project task from a project topic.
Add an agile phase or a test phase	Right-click a project and select **Add Agile Phase** or **Add Test Phase**. The agile phase icon or test phase icons appear next to the task in the **Name** column. See phase icons.

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WBS hierarchy tasks (continued)

Task	How to perform the task
	Note: • The **Add Agile Phase** option is available only for Agile and Hybrid projects. You must also have the Agile Development 2.0 plugin installed. • You can add multiple agile phases and multiple test phases to a project. • You can add only one test phase for a test plan in a project. You must have the Test Management plugin installed to view the **Add Test Phase** option. • An agile phase cannot overlap another agile phase for an assignment group in a project. • While creating a story, if a project has only one phase, then the story is tagged to the phase.
Open a test plan or story	Right-click a task (a task that represents a phase in the workbench) and then select **Manage Test Plan**. Select **View Stories** to view the stories list. If you have the scrum_product_owner role, select **View Stories** to navigate to the **Backlog** tab of the **Agile Board**. **Note:** The **View Stories** option is available only for Agile and Hybrid projects. You must also have the Agile Development 2.0 plugin installed.
Cancel a resource plan for a Closed project	Right-click the project and select **Cancel Resource Plans**. All past and future allocations for the selected resource plan are canceled. The option is available only for a project in any of the Closed states.
Complete a resource plan for a Closed project	Right-click the project and select **Complete Resource Plans**. All the requested and resource allocations for the resource plan post the completion date are deleted. The option to complete resource plans is available only for a project in any of the Closed states.

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WBS hierarchy tasks (continued)

Task	How to perform the task
Add an external dependency between tasks of different projects	Right-click a task and select **Add External Dependency**. Select the project and task to which the dependency is added.
View the project name of an external dependency	Point to the link icon (🔗) beside the external dependency task to display a tooltip which shows the name of the project to which the external dependency is added.
Change the time constraint for a task	Double-click a task under the **Constraint type** column and select an option: **Start ASAP**, **Start on specific date**, **Start no earlier than**, or **Start no later than**. • You can change the **Constraint type** for Automatic projects only. • When you change the time constraint for a task from **Start on specific date** to **Start ASAP** or vice versa, the planned start date and planned end date of the task are recalculated accordingly. • The **Constraint date** column displays the start date for all the constraint types other than **Start ASAP** tasks. This column is not available by default, you must add this column to the Planning Console from the Configuration menu. • The option is not available for a parent task. If a task has child tasks, the option is available only for the child tasks. • You cannot create a parent task with **Start no later than** or **Start on specific date** time constraint. When a new child task is added to a task with these time constraints, the time constraint for the parent task is converted to **Start ASAP**. • You cannot change constraint type for projects with **Calculation** type set as Manual.
Allow task dates outside schedule	Right-click a project task and select **Allow outside schedule**. The selected task is allowed to start and end on a non-schedule day (outside the regular project schedule) such as on a weekend. The off schedule task icon ( ) appears next to the task in the **Short description** column. For example, if you use the project schedule Monday to Friday, 8:00 to 17:00 and a project task of duration 2 days should start on

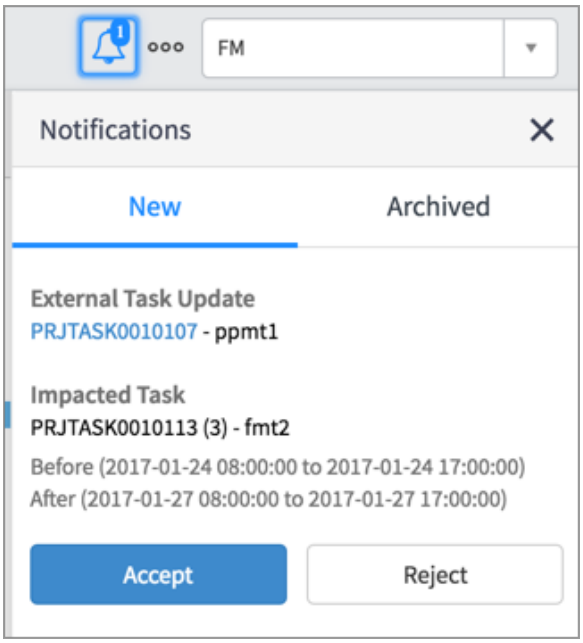
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WBS hierarchy tasks (continued)

Task	How to perform the task
	Saturday, then an off-schedule task is allowed to be scheduled on Saturday and end on Sunday. Similarly, if a task of duration 3 days starts on Friday, then an off-schedule will end on Sunday as opposed to ending on Tuesday. • The option is not available for a parent task. When a task is made off-schedule, its parent also becomes off-schedule. The project also operates as out of schedule if any of the children is set to out of schedule. • Once a task is allowed outside the schedule, the **Follow schedule** option is available for the task. Right-click the task and select **Follow schedule** to follow the schedule for the task. **Note:** • There is no difference between an off-schedule and an on-schedule task if there is no schedule defined at the project level. • 1 day is 8 hours for a task in a regular schedule and 24 hours for a task outside the schedule.
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.
Show or hide external dependencies	Click the more options icon (···), and then click the **Hide External Dependencies** switch. When this option is enabled, the external dependencies are not displayed when you add an external dependency between two projects. However, the **Dependency** column in the WBS section of the successor project still shows the value of external dependency.
Show external dependency notifications	Click the notification bell icon to display the notifications raised in the successor project. The notifications are triggered as a

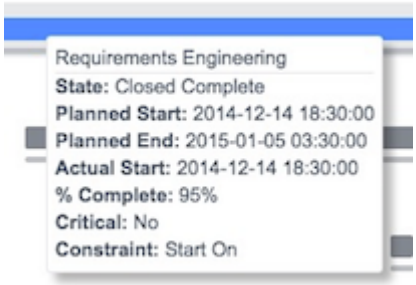
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WBS hierarchy tasks (continued)

Task	How to perform the task
	result of changes made in the predecessor project.  • For a soft dependency, click **Accept** or **Reject** to accept or reject the changes in the notification. • For a hard dependency, view the displayed notification to review the changes in the notification.
Save changes to the server	Click the save icon to commit changes made in the planning console. The option is available only when Client Side Planning Console is enabled.
Expand or contract column width	Click the side of the column and drag it right or left.
Show or hide columns in the planning console	Click the show or hide columns in gantt icon ( ), and then select or clear the check boxes for the columns available. Admin can customize which columns appear in this list. The selection is saved in the user preference. The next time you open the planning console, the same columns you selected will appear.
Select WBS levels to show	Click the show or hide columns in gantt icon ( ), and then select the level from the WBS **Depth** list.
Expand or collapse sublevels for any level	Click the arrow to expand or collapse any task that has one or more subtasks.

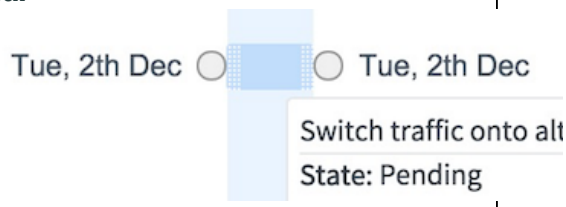
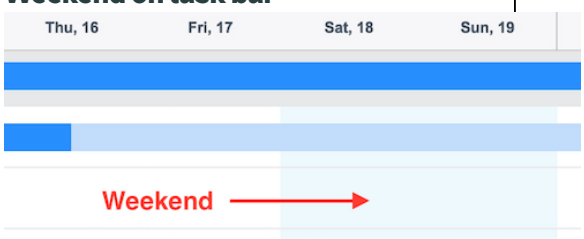
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Gantt chart tasks

Task	How to perform the task
View a summary of a task	Point to a task. **Tooltip for summary of the task** 
Change the planned start or end dates of a task	Click the task, and then drag the left or right edge of the task bar.
Move a task to a new date	Click the task, and then drag the whole task bar to a new location.
Create a dependency between tasks	Find the successor task in the relationship and double-click the value in the **Predecessor** column and enter a value that specifies the relationship. See Predecessor dependencies in the planning console for examples. Alternatively, you can create a relationship between two tasks by connecting the ends of the corresponding task bars in the timeline view.
Select a baseline	Click the more options icon (···), and then select a baseline from the baselines list.
Create a baseline	Click the more options icon (···), and then click **Create new baseline**. See Create baseline of a project for more information.
Compare schedule baselines	Click the more options icon (···), and then select a schedule baseline from the baselines list. Click the show or hide columns in gantt icon (⚙), and then select the following columns to compare schedule baselines: • Baseline start date • Baseline end date • Baseline variance
Display the critical path	Click the critical path icon (⚠). For more information on the critical path, see Gantt chart.

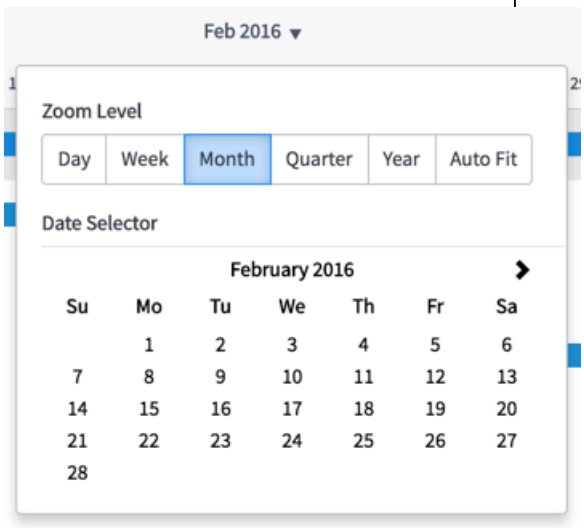
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Gantt chart tasks (continued)

Task	How to perform the task
Show date change	Click the more options icon (···), and then click the **Show Date Change** switch. When this option is enabled, the start and end dates of the task are displayed when you drag the task bar. **Start date and end dates on task bar** 
Show duration change	Click the more options icon (···), and then click the **Show Duration Change** switch. When this option is enabled, the duration of the task is displayed when you drag either end of the task bar. **Task duration** 
Show weekends on the calendar	Click the more options icon (···), and then click the **Show Weekends** switch. The weekends appear as light-blue vertical bars in the Gantt chart. **Weekend on task bar** 
Zoom the calendar in or out	On the top of the calendar, click one of the time periods, such as the month or day. Then select a **Zoom Level** from the calendar.

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Gantt chart tasks (continued)

Task	How to perform the task
	Calendar zoom  When the zoom level in calendar is selected as **Auto Fit**, the Gantt view fits in one page to display the entire timeline for the project in one go without using the scrollbar.
Open the tutorial	Click the more options icon (···), and then click **Walkthrough**.
Open list of keyboard shortcuts	Click the more options icon (···), and then click **Keyboard Shortcuts**.

Other features or applications tasks

Task	How to perform the task
Open the project workbench	Click the **Planning Console** selection arrow on the banner and select **Project Workbench**. For more information, see Project workbench.
Open live feed	Click the more options icon (···), and then click **Show live feed**.
Export project data in MPP, CSV, or XML format	Click the more options icon (···), and then click **Export Planning Console**. For more information, see Export project data.
Print the gantt timeline	Click the more options icon (···), and then click **Print**.

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Other features or applications tasks (continued)

Task	How to perform the task
	Note: • Printing on a smaller paper size might result in the gantt chart image being cut off. You may either zoom out using the gantt chart calendar, or increase paper size to print the gantt timeline for projects and tasks. • If the colored bars in gantt chart area are not visible in Print preview, then select the option for background graphics in the Print dialog.

Client side planning console

During calculation of project schedule in the planning console, it is possible to build your project structure quickly on the client side (browser) without having to save details in the server for each interaction. It prevents any time lags that occur after you perform any actions in the planning console, and improves the scheduling performance.

For example, when a project manager changes dates on a project task in the planning console, re-calculating the dates for the dependent tasks and the project can cause time lag if each interaction is saved to the server. Similarly, when a new task or a dependency is created, there can be a time lag before the new dates are displayed if they are saved on the server side each time.

When client side planning is enabled, the changes such as re-calculation of dates are not posted to the server immediately. All the changes in planning console are kept on client side until the user explicitly saves the changes to be committed to the server.

Exceptions

There are a few actions for which you must save your changes immediately to the server side before proceeding such as:

- Create baseline
- Copy project
- Copy partial project
- Add child tasks
- Add external dependency
- Edit Assigned to
- Edit Additional Assignees

In addition, if you enable custom business rules on any of the columns, those columns are also part of exceptions.

Enable client side planning

Enable client side planning in planning console to enable project scheduling at the client side.

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Before you begin
Role required: pps_admin

About this task
Build your project structure quickly on the client side without having to save details in the server for each interaction in planning console.

Procedure
1. Navigate to **All** > **Project Administration** > **Settings** > **Planning Console**.
2. In the Planning Console list, expand **Context: default** and select `Project[pm_project]`.
3. Select the **Enable Client Side Planning** check box to enable project scheduling at client side.

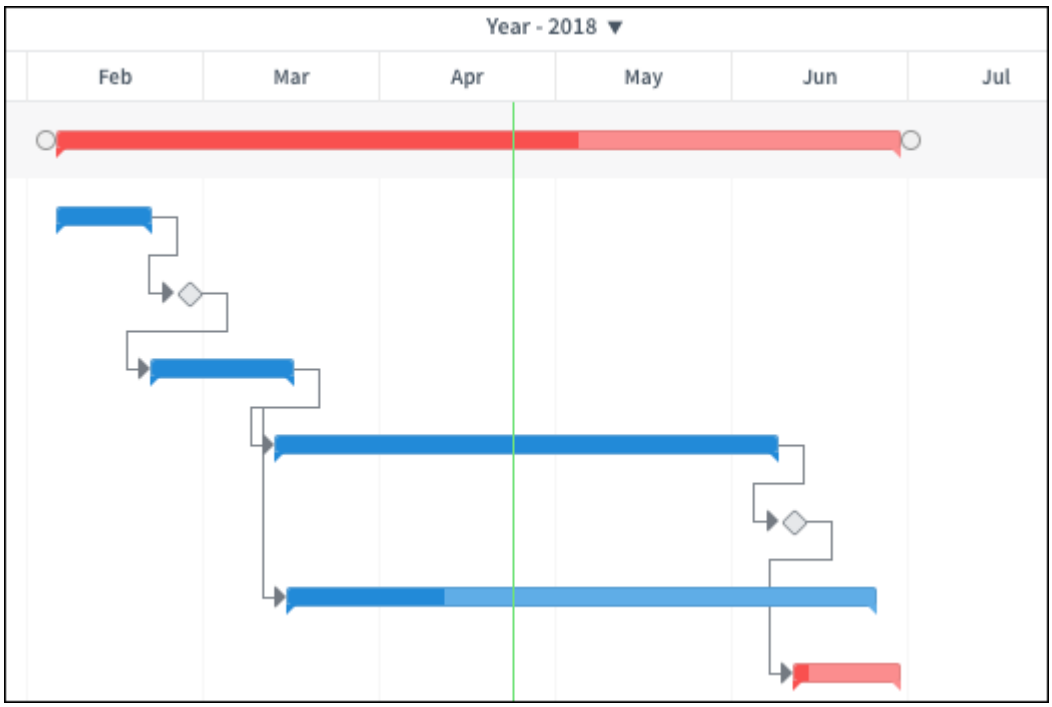
> **Note:**
> To enable this check box, the project property **Enable firing of Business Rules on save from Planning Console** must be set to false.

Gantt chart
A 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 add and delete tasks, change task dates and dependencies, and assess the progress of the overall project.

Gantt charts

Gantt chart



The critical path
The critical path is highlighted in red on the Gantt chart to differentiate critical path tasks from standard tasks in blue. Not all tasks are part of the critical path, only those tasks that directly affect the finish date. Use the critical path to determine which tasks are driving the finish date. If schedule adjustments are necessary, consider making resource or other changes to those tasks on the critical path.

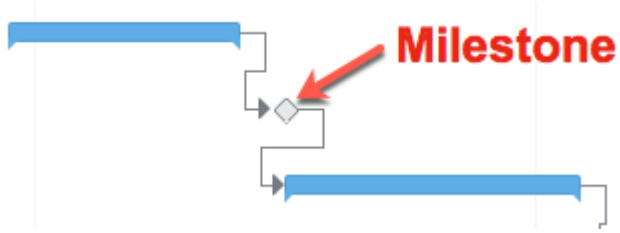
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The tasks that are not part of the critical path and can therefore be delayed are commonly called **slack** or **float** tasks. The Gantt chart shows the slack/float tasks by default, but calculations that deal with these tasks, such as how long they can be delayed without impacting the project, is not available.

Milestones

A milestone is a project task with a duration of **0**. Use milestones to indicate important dates in a project. If necessary, create dependencies between tasks and milestones so that a task does not start until a milestone has been reached.

Milestone



Color coding

The colors of the task bars on the Gantt chart are based on the percent complete and state of the task. The default color coding available for project and tasks is shown:

Color coding of project tasks

Color	Explanation
Light blue bar **Light blue bar** 	Task is pending or open.
Dark blue bar (full or partial) **Dark blue bar** 	The percentage complete is between 1% and 100%. The dark blue section indicates the percentage complete. The task can be in the Work in Progress state or Completed state.

Note:
The colors of the task bars on the Gantt chart can be configured from program workbench.

SDLC phases

Icons appear next to tasks to indicate what phase they belong to.

Phase icons

Icon	Phase
	Agile phase.
	Testing phase.

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Note:
Tasks in the waterfall phase do not display an icon.

Gantt chart options

Use the Gantt chart to quickly change task attributes, such as start and end time, rather than opening every Task form and modifying field values one by one.

From a Gantt chart, you can modify the following task attributes:

Modify tasks

Attribute	Description
Planned start date for project tasks	Move the task along the timeline to change the start time and to impose a *Time constraint* of *Start on a specific date*. You can also drag a task to change its start date if the task *Time constraint* is set to *Start on a specific date* (not *Start ASAP*) and the task has not yet started. The start date of a task cannot be modified if the task already started (has an actual start date), the task has already ended (has an actual end date), or the task time constraint is set to *Start ASAP*. You can also modify the dates in the **Planned start date** column on the console.
Planned start date for the project	Modify the dates in the **Planned start date** column on the console. You can add tasks that start earlier than the project's planned start date. By default, the planned start date shifts earlier or later when you add tasks to align with the earliest task start date. However, you can enable the project property **Rollup project start date from tasks** to retain the planned start date of the project even if you add tasks with a planned start date that is earlier or later.
Planned end date	Drag the right edge of the task bar to extend the planned end date. You can extend the planned of date only for tasks that are not parent tasks and that have not yet ended.
Dependencies	To edit or delete a dependency, double-click an existing dependency connector line between two tasks and update the settings in the Planned Task Relationship popup. The relationship *Type* for planned tasks is *Predecessor of::Successor of* and should not be changed.
Lag time and lead time	Lag time is an interval of time between the end of a predecessor task and the start of a successor task. The lag time delays the predecessor by an amount that you specify. Lead time is an interval of time that the predecessor task is allowed to start before it normally would. It is essentially a negative lag time. The value in the **Lag** field specifies both lag and lead time. To edit the **Lag** value, double-click a connector and update the settings in the Planned Task Relationship form. Enter a negative value to specify a lead time.
Resources	To change a user resource for an existing task or add a resource to a new task, double-click the task bar and edit the *Assigned to* field in the Project Task form.

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Modify tasks (continued)

Attribute	Description
	Note: The resources in **Assigned to** column can be constrained to be derived only from the allocated resource plans associated with the project or any of its task. The **Derive assignee list from resource plan** field on the project form controls the behavior.

The Project Management application provides several properties that control how tasks are calculated and behave. See Project property for more information.

Create a parent-child relationship on the planning console

The WBS section of the planning console allows you to create parent-child relationships for new tasks or move around existing tasks in a new parent-child relationship. The position of a task in the hierarchy and the level of indentation determine the parent-child relationship it has with the tasks above or below it.

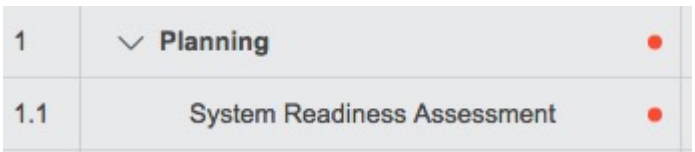
Before you begin

Role required: it_project_manager

About this task

In this example, the System Readiness Assessment task is a child of the Planning task because it is one level below the Planning task and is indented.

Parent-child relation for tasks



Procedure

1. Click a task in the WBS section of the planning console to highlight it.
2. Click a combination of any of the following icons to create the task and move it or move the other tasks to create the required hierarchy:

Creating parent-child relationships

Icon	Action
Add task above icon ( )	Create a task above the highlighted task.
Add task below icon ( )	Create a task below the highlighted task.
Indent icon (→)	Makes the highlighted task a child of the task above it.

Predecessor dependencies in the planning console

In the WBS section of the planning console, you can create dependencies between tasks by specifying a series of values.

The **Predecessor** column on the planning console can specify dependencies between tasks. The values that you put in this column must be in the following format:

```
{WBS_number}{dependency_type}+{lag_time}
```

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Where

- `WBS_number` is the number of the predecessor task in the relationship.
- `dependency_type` is one of the types of dependencies that the application supports.
- `lag_time` is the amount of time, in days, to delay the start of the dependent task. This value can be positive or negative integers.

The values are entered without the curly braces {}. See the examples in the table.

Note:
You can also edit tasks from the Gantt chart by clicking the relationship line. See Gantt chart options and Modify a project task dependency for details.

Project task dependency values

Dependency type	Example	Additional information
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.

Custom columns in the planning console

In addition to the regular columns that are provided in the base system, as the PPS admin, you can configure which columns appear in the planning console.

You can define the columns that are available in the project planning console, program workbench, planning and tracking views in portfolio workbench, and the release management Gantt chart. From this list of defined columns, you can select the columns that you want to view in these planning console UIs at any time.

These tables are used for custom column configuration:

- **Planning Console [pm_console]**: Stores the definition for planning consoles such as Project and Portfolio.
- **Planning Console Display Column [pm_console_display_column]**: Stores the planning console display columns such as Short Description, WBS, and Priority.

  A console stored in `[pm_console]` has multiple display columns that are stored in `[pm_console_display_column]`.

  Note:
  You cannot edit list of column if the column refers to a table other than the [sys_user] table.

- **Planning Console Table [pm_console_table]**: Contains a list of tables which provide data to a console.

  A console sources the data from multiple tables. For example, Project console `[pm_project]` pulls data from `pm_project` and `pm_project_task` table. This list of tables is maintained in `[pm_console_table]`.

- **Planning Console Column [pm_console_columnn]**: Maintains the columns that should be pulled from each table and the mapping of the column in `pm_console_display_column`.

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Add a custom column to the planning console

Define the columns that you want to make available in the project planning console, portfolio workbench, program workbench, and the release management Gantt chart.

Before you begin

Role required: it_pps_admin

Procedure

1. Navigate to **All** > **Project Administration** > **Settings** > **Planning Console**.
2. Add a custom display column for planning console.

   a. In the Planning Console list, select a console to which you want to add the custom column. For example, select `Project[pm_project]` to add a column to the project planning console.

   b. To create a display column for the selected console, click **New** in the **Planning Console Display Column** related list.

   c. On the Planning Console Display Column form, fill in the fields.

Planning Console Display Column form

Field	Description
Label	Label for the column to be displayed in the planning console.
Type	Data type of the column.
JSON Column	The JSON column name used internally by the Gantt chart when data is sent. **Note:** Leave blank. This field is auto-populated when you add a column for the display column in step 3.
Order	Position at which the column appears in the planning console.
Include in Tooltip	Check box for the column to be shown in tooltip in timeline in the planning console.
Width	Default width of the column in planning console.
Fire BR on Save	Option if the business rules should be triggered when the column is modified in the planning console. **Note:** The field is not visible on the form by default. Configure the form to add this field.
Trigger recalculation	Option if the recalculation of date and duration should be triggered when the column is modified in the planning console.

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Field	Description
	Note: The field is not visible on the form by default. Configure the form to add this field.

d. Click **Submit**.

The column is added in the `Planning Console Display Column [pm_console_display_column]` table.

3. Map the planning console display column created in step 2 to a column in a table defined in `Planning Console Table [pm_console_table]`.

a. In the **Planning Console Display Column** related list, open the display column record.

b. To create a record of actual column in the `Planning Console Column [pm_console_column]` table, click **New** in **Planning Console Columns** related list.

c. On the Planning Console Column form, fill in the fields.

Planning Console Column form

Field	Description
Display Column	Display column created in the Planning Console Display Column `[pm_console_display_column]` table.
Console Table	Console table to be mapped to the display column.
Table	Actual table from where the data is pulled in the display column. The field is auto-populated when you select a Console Table. For example, select a table from `[pm_project]` or `[pm_project_task]` for a display column added in the Project planning console `Project [pm_project]`.
Column	Actual column in the **Table** from where data comes for the display column.
Editable	Check box to make the column editable in the planning console.

d. Click **Submit**.

Result

The display column appears in the column filter list ( ) in the planning console.

Project Diagnostics

Project Diagnostics enables you to detect corrupt data in a project such as task validity, dependencies, and relationships using diagnostic scans that execute diagnostic scripts. You can also fix corrupt data using fix scripts.

Data might become corrupt or invalid for various reasons, such as:

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- Incorrect field mapping during project import
- Incorrect scheduling of tasks
- Incorrect dependency and relationship definitions

Project Diagnostics uses diagnostic scans and fix scripts to detect and fix corrupt data in your projects. It enables you to do the following action:

- Create and add diagnostic features
- Add diagnostic and fix scripts to fix corrupt or invalid project data
- Create Diagnostic scans and map related scripts
- Define fields for users to create specific filter conditions. The diagnostic scripts use the results of these filter conditions as input for detecting any corrupt or invalid data.

Project Diagnostics page provides the default scans described in the following table.

Project Diagnostics default scans

Diagnostic Scan Name	Description
Tasks with invalid top task	Lists the tasks that have an invalid top task. A task is considered to have an invalid top task if the value for the top task is set to **Null** or is mapped to a different task in the hierarchy.
Tasks with invalid top portfolio	Lists the tasks that have an invalid top portfolio. A task is considered to have an invalid top portfolio if it belongs to a different portfolio or is not associated with any portfolio.
Tasks with invalid top program	Lists the tasks that have an invalid top program. A task is considered to have an invalid top program if it belongs to a different program in the same portfolio or is not associated with any program.
Invalid relations	Lists the invalid relations in a project. A relation is considered to be invalid if the predecessor or successor is not a part of the project (unless it is an external relation), or if the predecessor or successor record does not exist in the system.
Validate parent tasks	Lists the tasks that have empty or invalid parents.
Check for tasks with cyclic dependencies	Checks for any cyclic relations, which are not permitted, in a project. For example, suppose you have a project in which Task A is related to Task B. A reverse relation from Task B to Task A would be considered a cyclic dependency.
Recalculate project	Recalculates task dates in a project. **Warning:** Performing this action might change the dates in a project.
Check duplicate/redundant relationships	Lists tasks that have duplicate or redundant relations in the selected projects.
Cost plans with no start and end fiscal period	Checks and lists cost plans with no start and end fiscal period within the selected projects.

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Project Diagnostics default scans (continued)

Diagnostic Scan Name	Description
Validate project task constraints in project	Lists all tasks with invalid constraint types. For example, a task with Start no later than set as a parent or the **Constraint date** field is empty for a task with Start no earlier than and Start no later than constraint.
Validate tasks with invalid state	Lists all tasks with invalid WIP or Closed state based on actual dates.
Identify projects with negative planned cost for any year where the budget was not allocated to the corresponding fiscal periods	Checks and lists the projects that have negative fiscal year project budgets.
Identify discrepancies in project budget	Checks and lists the projects for which project funding does not match with the sum of task type breakdown cost or fiscal year project budget.
Identify cost plan breakdowns with invalid fiscal periods	Checks and lists the cost plan breakdowns with invalid fiscal periods.
Identify duplicate task type breakdowns for an expense type and a fiscal period	Checks and lists the duplicate task type breakdowns.
Associate orphan expense lines to the system generated cost plan	Lists the expense lines that are not associated to any cost plan. When you run the fix script, these orphan expense lines are associated to a system-generated cost plan and then to the respective breakdowns of the system-generated cost plan.

Use Project Diagnostics to detect corrupt project data

Project Diagnostics uses the Application Diagnostics Tool to detect corrupt data in a project, such as tasks with invalid parents, tasks without top tasks, and invalid or cyclic relations in a project.

Before you begin

Role required: it_pps_admin

About this task

Project Diagnostics can also detect whether date calculations in a project appear to be incorrect, the planning console does not open for a project, or a few tasks or relationships do not appear in the planning console.

Procedure

1. Determine whether you want to run a diagnostic scan on a single project or multiple projects.
2. On the Application Diagnostics Tool page, select a diagnostic feature.
3. Use the Feature Inputs fields to specify filter conditions.
4. From the **Diagnostics** section, run a single diagnostic scan or multiple scans on the projects matching the filter criteria.

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5. View the results of the scans.

What to do next
Add your own diagnostic scans and fix scripts.

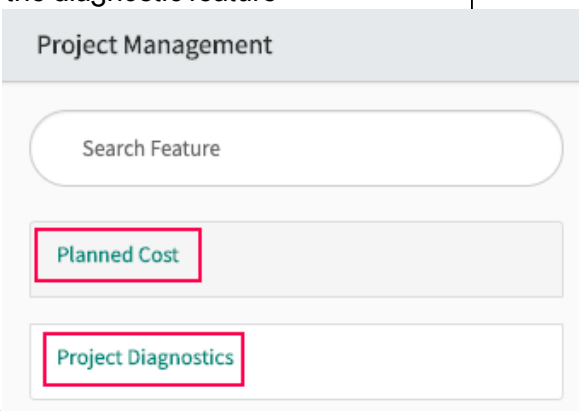
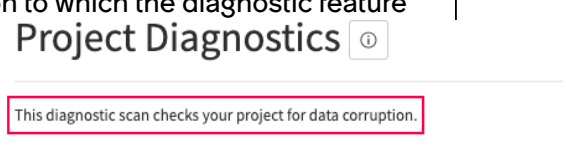
Create and add diagnostic features

Create and add diagnostic features, which consist of single or multiple diagnostic scans that execute mapped scripts to detect data corruption or invalid data.

Before you begin
Role required: adt_admin

Procedure
1. Navigate to **All** > **Application Diagnostics Tool** > **Features**.
2. Click **New**.
3. On the form, fill in the fields.

Diagnostics Feature form

Field	Description
Name	Name of the diagnostic feature. This name appears in the application to which the diagnostic feature belongs. 
Active	Option for activating the diagnostic feature.
Application	Search for and select the application with which you want to associate this diagnostic feature.
Roles	User roles that allow access to the diagnostic feature.
Description	Details of the scans in the diagnostic feature. The description is displayed in the application to which the diagnostic feature belongs. 

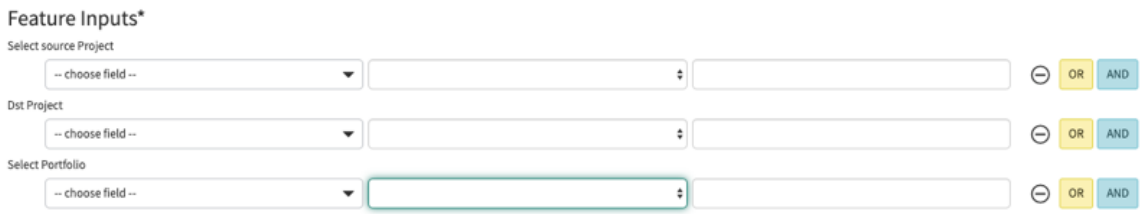
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4. Define the fields available to users for specifying filter conditions in the **Diagnostics Inputs** section.

Diagnostics Input fields

Field	Description
Label	Name of the label for the input fields.
Field Type	The **Reference** field type.
Table	Name of the table on which the query specified in the condition should run.
Key	An identifier for the user input condition. If a user specifies multiple conditions, this key acts as a unique identifier for each condition. You can use this key as the input for the *`scanContext`* section of the diagnostic script. For example, if you specify **projectFilter** as a key, the *`scanContext`* section of the diagnostic script would appear as follows: `var encodedQuery = scanContext.input.projectFilter;`

The fields that you configure in the **Diagnostics Inputs** section appear in the **Feature Inputs** section of the Application Diagnostics Tool page, as shown in the following example.



5. Click **Submit**.

What to do next

Create diagnostic scripts and add fix scripts to use with the diagnostic feature. For more information, see Add diagnostic and fix scripts.

Add diagnostic and fix scripts

Add diagnostic scripts to scan the data in your application for any corruption. You can also attach fix scripts to rectify the corrupt or invalid data identified by the diagnostic script.

Before you begin

Role required: adt_admin

About this task

The results of the filter conditions that you specify in a diagnostic feature are used as an input for the diagnostic script while executing. You can also use the result of one script in subsequent scripts.

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Procedure

1. Navigate to **All** > **Application Diagnostics Tool** > **Scripts**.
2. Click **New**.
3. On the form, fill in the fields.

Diagnostic Scripts form

Field	Description
Name	Name of the diagnostic script. Use a name that clearly explains the objective of the script. The script name also enables you to identify the correct script while mapping the script to a feature when creating a diagnostic scan.
Description	Details describing the actions of the diagnostic script.
Diagnostic script	The code for the diagnostic script. The following example shows a diagnostic script to identify tasks with an invalid top portfolio.

```
/*
- Inputs can be accessed from
 scanContext.input as per,
 the key specified in feature
 input table.
 eg.
 scanContext.input.projectSy
sID
- To pass variables from the
 one script to another script
 use varSpace in scanContext.
 eg.
 scanContext.varSpace.variab
le1 = '...';
*/
(function(scanContext) {
    try {
        var errorTasks = [];
        var encodedQuery =
 scanContext.input.projectFil
ter;
        var now_GR = new
 GlideRecord("pm_project");

 gr.addEncodedQuery(encodedQu
ery);
        gr.query();
        while (gr.next()) {
            var entitySysID =
 gr.getValue("sys_id");
            var
 projectData = new
 ProjectData(entitySysID);
```

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Field	Description

	var projectTopTaskValidator = new ProjectTopTaskValidator(projectData);
	
	if (projectTopTaskValidator.tasksWithInvalidTopPortfolioPresent()) {
	
	var failedTasks = projectTopTaskValidator.getTasksWithInvalidTopPortfolio();
	if (failedTasks && failedTasks.length) {
	
	for (var i = 0; i < failedTasks.length; i++) {
	
	errorTasks.push(failedTasks[i].sys_id);
	}
	}
	}

4. **Optional:** Include a script for fixing the corrupt or invalid data identified by the diagnostic script.
   a. Select the **Has Fix script** check box.
   b. Click the Edit User Roles icon ( ) and choose the roles that can access the diagnostic script.
   c. In the **Fix script** section, add the code for the fix script.
5. Click **Submit**.

Create Diagnostic scans and map related scripts

Once you have created diagnostic features and scripts, map them to a diagnostic scan to check the health of data in your application. Use fix scripts to rectify any corrupt or invalid data that the diagnostic scan identifies.

Before you begin

In order to create a diagnostic scan, you must have already created diagnostic features and scripts For more information, see Create and add diagnostic features and Add diagnostic and fix scripts.

Role required: adt_admin

About this task

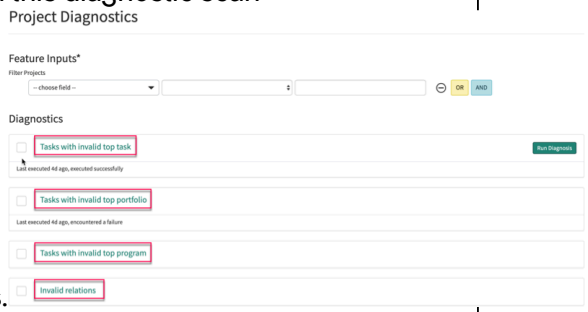
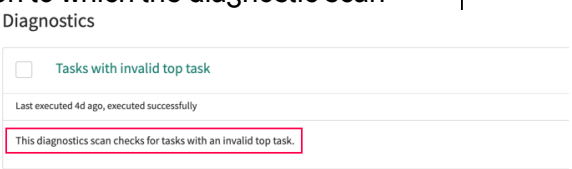
You can map multiple scripts with each diagnostic scan and define the order of their execution.

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Procedure

1. Navigate to **All** > **Application Diagnostics Tool** > **Diagnostics**.
2. Click **New**.
3. On the form, fill in the fields.

Diagnostics form

Field	Description
Name	Name of the diagnostic scan. This name appears in the application to which this diagnostic scan belongs. 
Active	Option for activating the diagnostic scan.
Order	Order in which this diagnostic scan appears in the application.
Feature	Diagnostic feature with which you want to associate this diagnostic scan.
Roles	Option for adding or removing user roles that can access the diagnostic scan.
Description	Details of the diagnostic scan. The description is displayed in the application to which the diagnostic scan belongs. 

4. Click the Roles icon ( ) and move the desired roles to the Selected list.
   The users with the selected roles can access the diagnostic script.
5. Search for and select diagnostic scripts to map with the diagnostic scan in the **Diagnostics and Script Mappings** section.
6. Click **Submit**.

What to do next

- Create related link for navigating to the diagnostic features and scans in the application. For more information, see Create a UI action.
- Run diagnostic scan and view results. For an example of how the diagnostics scan work, see Use Project Diagnostics to detect corrupt project data.

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Work breakdown structure (WBS)

The work breakdown structure (WBS) is a hierarchical representation of all the tasks in your project.

Use the WBS to get a quick overview of the entire project, including the tasks and subtasks nested in the project. The Gantt chart gives you a similar overview using graphical elements like lines and bars to show dependencies and lengths of tasks. The WBS is more data-driven, presenting a wide variety of task information in expandable rows.

You can view the WBS on the planning console, or as a related list on the Project or Project Task form. See Open the project planning console or Access the WBS as a related list.

When the WBS is viewed as a related list on the Project or Project task form, several important columns from the table appear by default.

Important columns

Column Name	Description
WBS	The number of the task in the WBS hierarchy. The first task in the hierarchy is assigned the number 1. Subtasks increment the number in the tenth place, such as 1.1 and 1.2. The numbers are read-only.
WBS Order	A number that represents the task in relation to its parent. The first subtask under a task has an WBS Order of 1, and the next task 2. If you edit a number, all tasks are moved accordingly after you refresh the list.
Number	The task ID number, which should not be changed.

Other useful information also appears by default, such as the description and percentage complete. You can personalize the list like any other list by clicking the personalize list icon () and selecting the columns you want to view.

Access the WBS as a related list

You can view the WBS as a related list on both the Project and Project Task forms.

Before you begin

Role required: it_project_manager

About this task

You can view the full WBS list by navigating to a Project form and clicking the **Planning Console** related link. See Planning console tasks for a list of the things you can do with the WBS on the planning console.

You can also view the WBS as a related list on the Project or Project Task form.

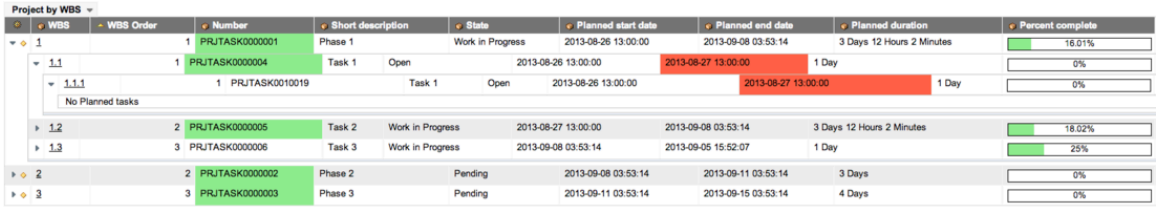
Procedure

1. Navigate to a Project or Project Task form.
2. Right-click the header and select **View > WBS**.
   WBS List appears as a related list.

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3. On the WBS, click the arrow icon ( ) to expand a task and view child tasks.

Demo Project WBS

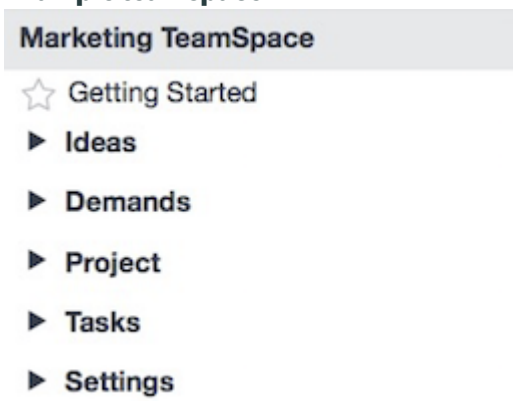


Teamspaces

A teamspace appears as an application in the instance application navigator. The teamspace includes module links that come from the Project Portfolio Management applications, such as the Project, Idea, Demand, Program and Portfolio applications.

Use teamspaces to provide functional and data separation of these applications between different teams in your organization. The following is an example teamspace for a marketing team:

Example teamspace



Teamspace activation

You must activate a teamspace plugin to use the teamspace feature. Following teamspace plugins are available:

- **Project Management TeamSpace 1** (`com.snc.ppm_teamspace_1`)
- **Project Management TeamSpace 2** (`com.snc.ppm_teamspace_2`)
- **Project Management TeamSpace 3** (`com.snc.ppm_teamspace_3`)
- **Project Management TeamSpace 4** (`com.snc.ppm_teamspace_4`)
- **Project Management TeamSpace 5** (`com.snc.ppm_teamspace_5`)

The teamspaces loaded with these plugins contain the same components, but the components have different prefixes. For example, teamspace 1 includes a project table named **Teamspace_1 Project [tsp1_project]** and teamspace 5 includes a project table named **Teamspace_5 Project [tsp5_project]**.

You can enable any or all of these teamspaces and assign the teamspace specific roles to relevant users in the group that should use the teamspace. Maximum five teamspaces can be created through plugins.

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Teamspace customization

You can customize the Project and Demand portions of a teamspace without affecting other teamspaces. This table summarizes what you can customize:

Teamspace customization

Customization to Project or Demand within a teamspace	Supported?
Data model changes, such as adding a field to the Project or Demand form.	Yes
Changes to business rules, UI actions, UI policies, security rules, data policies, and workflows.	Yes
Changes to shared roles, such as project_manager, demand_manager, and so on.	Yes
Form and list layouts, list controls, and related lists	Yes
Dictionary overrides	Yes

Activate teamspaces

You can activate one or all teamspace plugins to use the teamspaces feature.

Before you begin

Role required: admin

About this task

You must activate a teamspace plugin to use the teamspace feature. Following teamspace plugins are available:

- **Project Management TeamSpace 1** (`com.snc.ppm_teamspace_1`)
- **Project Management TeamSpace 2** (`com.snc.ppm_teamspace_2`)
- **Project Management TeamSpace 3** (`com.snc.ppm_teamspace_3`)
- **Project Management TeamSpace 4** (`com.snc.ppm_teamspace_4`)
- **Project Management TeamSpace 5** (`com.snc.ppm_teamspace_5`)

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note:
   When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

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Installed with teamspaces

The tables and roles that are installed with project teamspaces are prefixed with an abbreviation based on the name of teamspace.

Tables

The tables are extended from the Project, Idea, and Demand base application tables.

Tables installed with teamspaces

Tables	Description
Idea [prefix_idea]	Stores ideas.
Demand [prefix_demand]	Stores demands.
Project [prefix_project]	Store projects.
Portfolio [prefix_portfolio]	Stores portfolios.
Project Task [prefix_project_task]	Stores project tasks.
Portfolio Goal [prefix_portfolio_goal]	Stores portfolio goals.
Portfolio Issues [prefix_portfolio_issue]	Stores portfolio issues.
Portfolio Risk [prefix_portfolio_risk]	Stores portfolio risks.
Portfolio Project [prefix_portfolio_project]	Stores portfolio projects.
Project Template [prefix_project_template]	Stores project templates. **Note:** Project templates that are created in a teamspace area are not available in the main Project Management application any longer. They are only available to the teamspace in which they were created.
Project Template Task [prefix_project_template_task]	Stores project template tasks.
Stakeholder Register [prefix_stakeholder_register]	Stores the stakeholders.
Program [prefix_pm_program]	Stores programs.
Program Task [prefix_pm_program_task]	Stores program tasks.
Program Task [prefixpm_program_task project_status]	Stores program task project status.

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Roles

Roles installed with teamspaces

Role	Description
prefix_demand_manager	Managers of the demand features for the teamspace.
prefix_demand_user	Users of the demand features for the teamspace.
prefix_project_manager	Managers of the project features for the teamspace.
prefix_project_portfolio_user	Users of the project portfolios for the teamspace.
prefix_project_user	Users of the project features for the teamspace.
prefix_program_manager	Managers of the program features for the teamspace.
prefix_portfolio_manager	Managers of the portfolio features for the teamspace.

The teamspace application uses the same views that are provided in the Project, Idea, and Demand base applications.

Note:
Default client scripts that these base applications use are inherited by the extended tables in the teamspace application. If you created custom client scripts for any of the base applications, select the **Inherited** options on each Client Script form before you create the teamspace.

Configure teamspace settings

Configure teamspace settings after you activate a teamspace plugin.

Before you begin
Role required: it_pps_admin

Procedure

1. Navigate to **All** > **Project Administration** > **Settings** > **TeamSpaces**.
2. Click a teamspace name.
3. Change the teamspace name if necessary.
   Changing the name only changes the title that appears in the application menu. It does not modify the names of other components, such as table names or role names.
4. On the Tables, Roles, and Application Menu related lists, you can add or modify the tables, roles, and application modules for the teamspace.

Result
The teamspace becomes available in the menu. The records that are assigned to the teamspace, such as projects, portfolios, demands, are automatically added to the teamspace.

What to do next
Assign the teamspace roles to the users of that teamspace. Do not assign the general roles that come with the applications in the Project Portfolio Suite.

Project workbench

The project workbench provides a central location for creating and managing projects.

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The workbench supports the Project Management and application life cycle management applications, allowing for a hybrid approach to project management. Project managers can create projects that combine both waterfall and agile methodologies and add waterfall, agile, and test phases to these projects.

The project workbench makes it easy to manage projects by presenting project information in two panes. The top pane displays a timeline with the project phases and milestones. The bottom pane displays details for the phase selected in the timeline. The project workbench provides real-time interaction between the timeline, the list view, and the visual task board.

The project workbench also supports the following features:

- **Project templates**: Project managers can quickly and easily create projects based on templates, which define the basic structure of a project.
- **Manual project calculation**: The workbench adds the capability of creating projects that use manual calculation. Project managers can also create auto calculation projects from the Project Management application.
- **Composite fields**: The field type combines information from two fields in a table to form a single field.

With the project manager role, you can use the project workbench to:

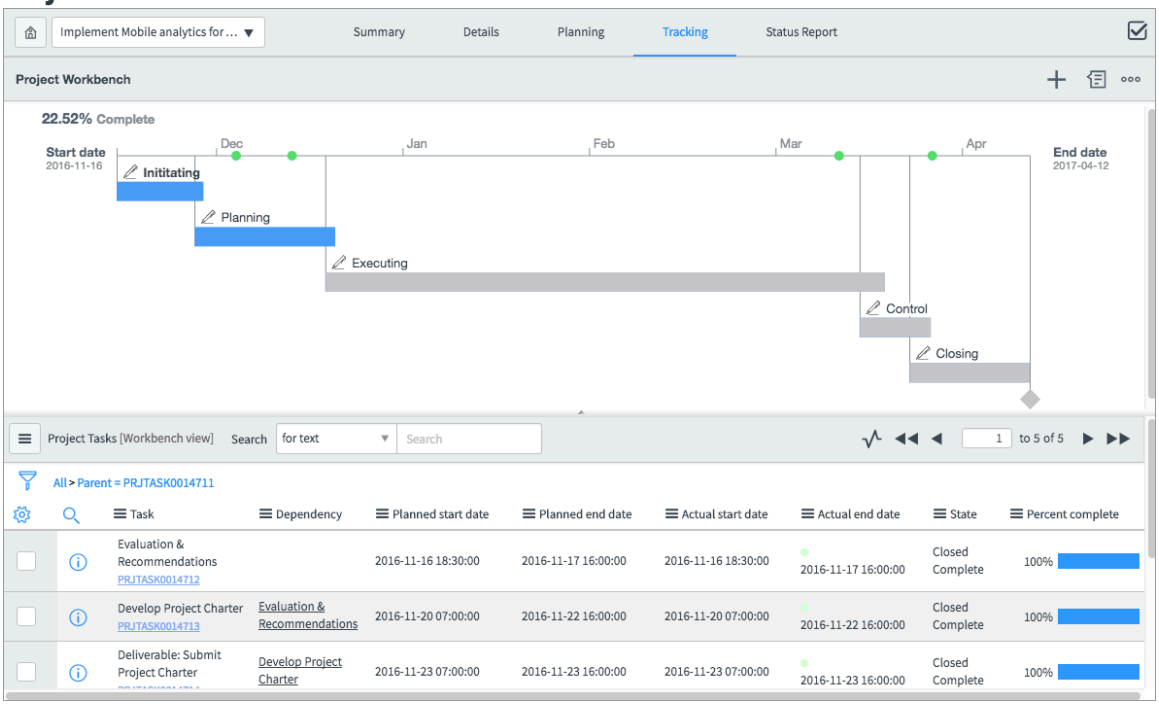
- Manage projects.
- Create and update project phases and milestones.
- Assign a group to an agile phase.
- Create and update project tasks, stories, and test cases.
- Attach test plans to a test phase.
- View and manage project details from a list view or visual task board.

The project workbench displays project information in two distinct areas. The top pane displays the project visualization, and the bottom pane displays phase details in a list view or visual task board. There is also a header above the workbench that includes several buttons and controls.

The project workbench scales to fit the available browser height. If necessary, scroll bars are added to display the workbench details.

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Project Workbench



Access the project workbench

Access the project workbench from the Project form or from the application navigator.

Before you begin

Role required: it_project_manager

Procedure

Access the project workbench in one of the following ways.

Note:
If the project workbench opens with no associated sys_id or an incorrect sys_id, an error message appears. Select a project from the project choice list in project workspace banner.

Components of project workbench

The project workbench displays project information in two distinct areas. The top pane displays the project visualization, and the bottom pane displays phase details in a list view or visual task board. There is also a header above the workbench that includes several buttons and controls.

The project workbench scales to fit the available browser height. If necessary, scroll bars are added to display the workbench details.

Header

The header is a gray bar that runs across the top of the project workbench.

The first time a user accesses the project workbench from the Project menu, the header displays the following components:

After a project is opened, the header displays additional components, depending on the type of project selected.

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- Back ( ): takes the user to the Project form to view the project details.
- **Select Project**: displays the current project name. Click the down arrow to select a new project.
- Add phase icon ( ): adds a phase or milestone to the timeline.
- **Apply Template**: opens a dialog box for setting a start date and adding a template to the project. This button appears for new or blank projects that have no phases.
- **Manage Stories**: under the Options icon ( ) displays the story backlog for this project.
- **List**: under the Options icon ( ) displays additional details in list view about the currently selected phase. This button appears if a project has one or more phases.
- **VTB**: under the Options icon ( ) displays additional details in the Visual Task Board about the currently selected phase. This button appears if a project has one or more phases.

Timeline

The top pane of the project workbench displays the project timeline. The timeline uses monthly or quarterly markers to represent time. If the duration of a project is less than 500 days, these markers represent months and if the duration is greater than 500 days, these markers represent quarters.

The project timeline displays the following project information:

- Project name: the name assigned to the project. Point to the project name to see a message about the project date calculation method used for this project.
- Percentage complete: the percentage of the project that has been completed. This percentage is based on the duration and the percentage complete of the individual phases.
- Project start and end dates: the dates specified in the **Planned start date** and **Planned end date** fields for this project.
- Project phases: colored bars that represent the different phases of the project.
- Milestones: colored and dynamic circles on the timeline that represent important dates in the project life cycle.

Phases in timeline

A project phase is represented in the timeline by a horizontal bar. The bar is connected to the timeline by a thin vertical line that indicates the phase start date. The name of the phase appears just above the horizontal bar. Project phases are stacked in the timeline by start date, phase, and the earliest start date appearing at the top. If there are phases than can fit on the timeline, a scroll bar appears on the right side.

The color of the horizontal bar changes incrementally to reflect the completion percentage of the phase. The percentage completion is calculated based on the phase type:

- **Waterfall**: includes project tasks. The completion percentage is based on the number of project tasks that have been completed.
- **Agile**: includes stories. The completion percentage is based on the number of story points that have been completed.
- **Test**: includes test cases. The completion percentage is based on the number of test cases that have been completed.

The available phases depend on how Project Management is installed. When Project Management is installed as a standalone app, the project manager can only create and edit the Waterfall phase type. When Project Management is installed as part of the Project Portfolio

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Management (PPS), the project manager can create and edit all phase types (Waterfall, Agile, and Test).

When you point to a phase, the cursor changes from an arrow to a hand and a pop-up window displays the phase name and the start and end dates. Clicking a phase in the timeline displays the corresponding task information in the bottom pane of the project workbench.

Milestones in timeline

Milestones indicate important dates in a project and are represented along the timeline by colored circles. Three colors are available for milestones: green, yellow, and red. The project manager determines how the colors are used.

Pointing to a milestone changes the cursor from an arrow to a hand and displays a pop-up window with the short description and planned start date.

Click a milestone to update the milestone information. You can also drag a milestone along the timeline to change the date. Milestones can be dragged to any point on the timeline within the boundaries of the project start and end dates.

Detail view

The bottom pane of the project workbench displays detailed information for the phase currently selected in the timeline. The information displayed varies by the phase type selected:

- **Waterfall**: displays the project tasks associated with the phase.
- **Agile**: displays the stories assigned to the phase.
- **Test**: displays the test cases for the testing phase.

Information in the bottom pane can be displayed in list view or in a visual task board. The **List** and **VTB** buttons in the Project Workbench header control how this information is displayed.

Project calculation

When creating a project, the project manager can select the type of calculation to use: manual or automatic (default).

The project workbench displays help text that explains whether the current project is calculated automatically or manually. The help text appears when the project workbench page loads and also when the user points to the project name in the upper left corner.

For manual calculation:

- Dates on tasks do not automatically reflect any changes from dependent tasks.
- New projects created from the project workbench and projects created from demands are set to manual calculation by default. Projects created as manual can be changed to automatic.
- The project timeline reflects the earliest planned start date and latest planned end date based on the project tasks.
- The constraint type cannot be changed.
- Only **Start on specific date** constraint type is allowed for project tasks.

For automatic calculation:

- A task automatically reflects any changes from its dependent and child tasks.
- New projects created from the Project Management application are set to automatic calculation by default.

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Note:

- A project created as automatic with one or more tasks cannot be converted to manual.
- Percentage completion and states for phases are updated automatically for both manual and auto calculation.

Project workbench actions

The project workbench allows project managers to manage all aspects of a project.

Open a project in the project workbench

The project manager can open an existing project in the project workbench.

Before you begin

Role required: it_project_manager

Procedure

1. In the project workspace banner above the project workbench header, click the down arrow in the project selector box.
2. Select a project from the choice list.
   The selected project opens in the project workbench under **Planning** tab in project workspace.

Create a project task in the project workbench

Create a project task for a waterfall phase.

Before you begin

Role required: it_project_manager

About this task

While creating a project task in the project workbench, the time constraint type is defaulted based on the project type.

- For a manual project, the default constraint is Start On and cannot be changed.
- For an automatic project, the default constraint is Start ASAP and can be changed to Start On if required.
- When the constraint is Start ASAP, the **Planned start date** is disabled.
- When you create an agile phase and associate a sprint, the start date of the task is set from the sprint start date and the constraint becomes Start On automatically.

Procedure

1. Click a waterfall phase in the project workbench timeline.
2. Click **New** in the detail view.
3. Fill out the Project Task form.
4. Click **Submit**.

Manage project stories in the project workbench

If Project Portfolio Management and Agile Development 2.0 are activated, the project manager can manage the stories in a project from the project workbench.

Before you begin

Activate Project Portfolio Management and Agile Development 2.0 plugins.

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Role required: it_project_manager

About this task

Manage stories in your project using the **Manage Stories** option in the Project Workbench.

Procedure

1. In the project workbench header, click the options icon () and then click **Manage Stories**. The Backlog section of the Agile Board opens in a new tab.
2. Click a story to open the Story form in the pop-up window, or click **New** to create a new story.
3. Fill in the fields on the Story form.
4. Click **Update** or **Submit**.

Create a story in the project workbench

Create a story for an agile phase.

Before you begin

Role required: it_project_manager

Procedure

1. Click an agile phase in the project workbench timeline.
2. Click **New** in the detail view.
3. Fill out the Story form.
4. Click **Submit**.

Create a test case in the project workbench

Specifying a test plan is optional when creating a test phase. However, before you add test cases to a test phase, you must specify a test plan.

Before you begin

Role required: it_project_manager

Procedure

1. Click a test phase in the project workbench timeline.
2. Click **New** in the detail view.
3. Fill out the Test Case form.
4. Click **Submit**.

Investment Portal

Completing projects and demands on time within budget is a challenge. Investment Portal gives you a comprehensive view of project and demand financials, deadlines, and other important metrics in an intuitive user interface that makes project and demand management more efficient.

Tracking and managing your investments (both projects and demands) and then creating investment reports and sharing them through email is time consuming and inefficient. To generate a report you must obtain the status of projects and demands from project and demand managers, produce the report, and then email it.

With Investment Portal you can create an investment board through filter definition, and share it with other stakeholders. You can save time on new investments by creating, cloning, or

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modifying boards as needed. Filtering makes it easy to surface information on the fly and for reporting.

Here are a few examples showing how Investment Portal can make managing and reporting more efficient:

- If you are launching an application store, you can monitor overall program progress and surface projects that are creating bottlenecks.
- For a new business application you can review and edit the investment roadmap for the next few weeks, months, or years.
- For a key strategic initiative, you can review what was accomplished in the previous year and plan for the next eighteen months.

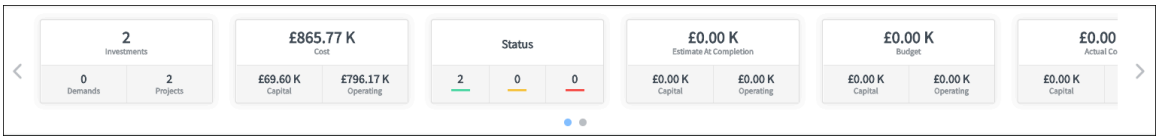
Investment Portal is divided into the following sections:

Banner icons

You can edit, copy, delete, bookmark, and share your investment board with other members and groups using the banner icons on the header of Investment Portal. See Track your key investments for more information.

Investment widgets

You can view important metrics like total cost, actual cost, and budget with investment widgets that can be configured.



Key tabs

You can track important aspects of your projects and demands in one location using the following tabs.

- **Overview**: A high-level summary of your projects and demands. The information in the grid is based on the project and demand form fields.
- **Timeline**: Key milestones in a Gantt view. Gantt view provides an overview of projects using graphical elements such as lines and bars to show dependencies and lengths of tasks.

  The Work Breakdown Structure (WBS) in the tab displays only milestones and key milestones.

- **Financials**: A detailed breakdown of project and demand costs in yearly, monthly, and quarterly formats, and based on cost plans associated to your projects and demands.

  The tab is displayed only to the user who has the it_project_manager role.

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Note:

Investment Portal’s loading time directly depends on number of demands or projects and their related entities like cost plans and breakdowns, that match with the defined query. Typically, the board's performance is optimal with approximately 50 projects or demands, with each project containing 10 to 15 cost plans.

The application doesn't restrict the number of records being fetched. So, users are recommended to define the query in such a way that optimal number of records are fetched to ensure that the performance is not affected.

Viewing all your investment boards in one location

Display all your important investment boards in a single location using the My Investment views page.

When you open the Investment Portal module, you start in the My Investments Views page where you can:

- Create investment boards using filter conditions.
- View widgets on an investment board.
- Search for an investment board by the name or owner.
- View boards in different color bands based on the applied filter, such as portfolio or program. For example, the green color band on the card, in the following screen shot, indicates that the projects and demands are filtered by a portfolio.
- Drill down an investment board to review its projects and demands in terms of cost, schedule, and scope.

Tabs

Access investment boards more quickly by using tabs.

- **Recent**: Recently accessed investment boards.
- **Bookmarked**: Bookmarked investment boards.
- **Created by me**: Investment boards you own.
- **Shared to me**: Investment boards that are shared with you.

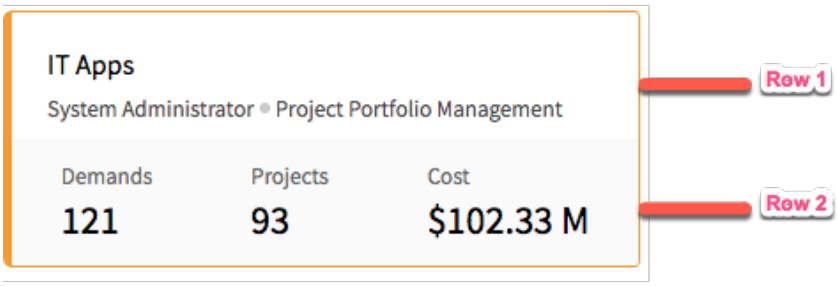
Investment board

Key details of an investment board include:

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- **Row 1**: Name, owner, and type of the board.
- **Row 2**: Some out-of-box investment metrics. The number of metrics displayed in this row is fixed, but you can configure which metrics are displayed,

Example of an investment board



Create an investment board

View the projects and demands that are important to you by creating a personalized investment board using filter criteria you define.

Before you begin

Role required: it_project_manager, it_project_user, or sn_ppm_finance_read

Procedure

1. Navigate to **All** > **Project** > **Investment Portal**.
2. On the My Investment Views page, select **New**.
3. In the Create new window, fill in the fields

Note:
Using **Tags** as a filter criteria might not fetch all the required tabs to work on investments.

Result

Once your investment board is created, it opens up in the Investment Portal page.

Note:
By default, the investment board contains those widgets that have **Include by default** check box selected. You can add or remove widgets from your investment board by using Widget Configuration.

Track your key investments

Track and analyze the cost, schedule, and scope of your investments in one place using Investment Portal.

Before you begin

Role required: it_project_manager or it_project_user

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Procedure

1. Navigate to **All** > **Project** > **Investment Portal**.
2. From the My Investment Views page, create an investment report and navigate to Investment Portal.
3. Use the following banner icons.

4. Perform the following actions in the **Overview**, **Timeline**, and **Financials** tabs.

Configure your investment metrics as widgets

Configure investment metrics based on your business requirements. These metrics appear as widgets on the Investment Portal page.

Before you begin

Role required: pps_admin

Procedure

1. Navigate to **Project Administration** > **Investment Portal Widgets**.
2. Click **New**.
3. In the form, fill in the fields:

Portal board widget form

Field	Description
Name	Unique name for the widget you are configuring.
Order	The order in which your widgets appear on both your Investment Board and the Investment Portal page. Lower numbers are placed ahead of higher numbers. For example, a widget with an order set to 100 appears before a widget with an order set to 200.
Aggregate type	Type of aggregation applied for the investment widget calculation: **Sum**, **Average**, **Minimum**, **Maximum**, and **Count**. For example, you are aggregating the actual cost of three projects, A, B, and C, surfaced by a filter. Actual costs are 1000 for project A, 2000 for project B, and 3000 for project C. If sum is selected as the aggregate type, then the actual cost metric value would be 6000. If average is selected as the aggregate type, then the actual cost metric value would be 2000. If minimum is selected as the aggregate type, then the actual cost metric value would be 1000. If maximum is selected as the aggregate type, then the actual cost metric value would be 3000. If count is selected as the aggregate type, then the actual cost metric value would be 3.
Scripted	Check box to specify a script for the investment widget calculation.
Show Label	Check box to display either the label or the color indicator. If you clear the check box, the **Color** field displays, which allows you to set the color.

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Field	Description
Active	Check box to indicate that the investment widget is active.
Display on board	Check box to display the investment widget on your investment board.
Parent widget	Parent widget for this investment metric widget. A parent widget can have up to a maximum of three child widgets.
Include by default	Check box to show an active investment widget by default on: ○ new boards ○ existing boards that do not have widget selection configured The check box is selected by default. For more information on configuring widgets on an investment board, see Widget Configuration.
Short description	Brief description about the investment widget.

Script	Script written for the dynamic calculation of investment widget. This field is displayed only when the **Scripted** check box is selected.
	
	The following script returns a string containing the desired output to be displayed on widget. Five variables (which are programmatically introduced to the script) are available:
	
	○ projectFilter: Project filter of Investment Portal board.
	○ demandFilter: Demand filter of Investment Portal board.
	○ projectClass: Project class of Investment Portal board which is used during teamspaces value evaluation. It returns tsp1_project for Teamspace1 Portal Board.
	○ demandClass: Demand class of Investment Portal board which is used during teamspaces value evaluation. It returns tsp1_demand for Teamspace1 Portal Board.
	○ boardSysId: SysId of Investment Portal board. It provides access to more information on Investment Portal board when needed.
	Sample scripted widget for project cost
	`totalProjectCost();`
	
	`function totalProjectCost()`
	`{`
	`var totalCost = 0;`
	
	`if(!JSUtil.nil(projectClass)`
	`&& !JSUtil.nil(projectFilter))`
	`{`
	`var projectGa = new`
	`GlideAggregate(projectClass);`
	`projectGa.addEncodedQuery(projectFilter);`
	`projectGa.setGroup(false);`
	`projectGa.addAggregate('SUM', 'cost');`
	
	`projectGa.query();`

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Field	Description
	`if(projectGa.next()) { if(projectGa.getAggregate('SUM', 'cost')) totalCost += parseFloat(projectGa.getAggregate('SUM', 'cost')); } } return PPMCurrencyHelper.defaultCurrencySymbol() + PPMCurrencyHelper.getFormattedAmount(totalCost); }`

Project section of the Portal board widget form

Field	Description
Project aggregate column	Aggregation is applied on the selected column of the Project [pm_project] table.
Project table	Table from which projects are being filtered.
Project filter	Criteria applied to filter projects from the Project table.

Demand section of the Portal board widget form

Field	Description
Demand aggregate column	Aggregation is applied on the selected column of the Demand [dmn_demand] table.
Demand table	Table from which demands are being filtered.
Demand filter	Criteria applied to filter demands from the Demand table.

4. Click **Submit**.

Multicurrency in Project Management

Use the multicurrency feature to execute a project or part of a project in a different geographic location that has a different local currency.

The feature helps you to view the cost details of the project in a currency that is different from your functional currency. The values in the project's cost plans, benefit plans, and corresponding cost fields of the project form are also converted to a currency that you specify as project currency. Therefore, you don't need to convert the project currency to the functional currency of the project when the project is executed at a location that uses a currency different than your functional currency.

Activation information

Activate the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin to enable the multicurrency features in Project Management. Activating the plugin enables the project currency view in project, cost plans, and benefit plans forms. With the project currency view, you can manage your project financials and cost plans in multiple project currencies.

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Note:
Activating this plugin automatically activates PPM Standard (com.snc.financial_planning_pmo) plugin and therefore you get the option to switch between the default view and the project currency view.

Project currency view

In addition to the default view in the Project form, there is Project Currency view, which you can optionally enable to view the multicurrency fields. You can enable this view from the form context menu. The view appears only when you activate the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin.

Unlike the Default view, the Project Currency view contains multicurrency-related fields.

You can designate a currency other than the functional currency as the processing Project Currency for a project. The **Financials** tab of the Project form has the **Project currency** field. You can select an active currency from the Currencies [fx_currency] table.

Note:

The **Project currency** field of a project becomes read-only field and locked down for updating the currency once you create a cost plan, cost plan breakdown, benefit plan, benefit plan breakdown, or an expense line for the project.

Specify project currency in Demand

You can specify the project currency that you want to use for managing a project when you convert a demand to a project. You can continue to manage the demand using your functional currency, project currency, or a local currency. For more information, see Multicurrency in Demand Management.

Projects in Project Workspace

Track your projects in project currency in the Project Workspace. Create and monitor the cost plans and benefit plans for a project in project currency. For more information on project workspace, see Project Workspace.

To view the cost component in project currency at the grid level and at the breakdown level, see Create and manage cost plans and benefit plans for a project.

Project status reports

To view the planned and actual cost status of your projects in project currency, open the overview and cost sections of project status reports.

Enable project currency view in project-related forms

Switch over to the project currency view to track the planned costs of a project in the selected project currency.

Before you begin
Role required: it_project_manager

About this task
To manage your projects in local currency and to create a project from a demand, the project currency fields are added in the following tables that have cost details and financials tab:

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Tables with project currency fields

Table name	Description
Demand [dmn_demand] table	To create a project from a demand in project currency. Specify the currency that you want to use to manage your project by navigating to the **Financials** tab of the Demand form and selecting a currency in the **Project Currency** field. **Note:** You can specify the project currency only when you switch to the Demand Currency view. For more information, see Multicurrency in Demand Management. To create a demand, see Create a demand.
Project [pm_project] table	To navigate to the Project form, see Define a project.
Cost Plans [cost_plan] table	To navigate to the Cost Plan form, see Create a project cost plan.
Cost Plan Breakdown [cost_plan_breakdown] table	To navigate to the Cost Plan Breakdown form, see Update a cost plan breakdown.
Benefit Plan [benefit_plan] table	If you open the project form in Project Currency view, then by default the project currency related fields appear in the Benefit Plans related list. To create a project benefit plan, see Create a project benefit plan.
Benefit Plan Breakdowns [benefit_plan_breakdown] table	To update a benefit plan breakdown, see Update a benefit plan breakdown.
Expense Line [fm_expense_line] table	Expense lines are part of project cost plans and stores cost associated with a specific resource. To navigate to the Expense line form, see Create an expense line.
Project Funding [project_funding] table	Stores the project target and budget expense values for both capital and operating expenses for a single fiscal period.

Procedure

1. Navigate to the respective form.
2. Right-click the context menu of the form.
3. Click **View**.
4. Select **Project Currency** from the list.

What to do next

Refer to the form fields that are exclusive to the Project Currency view that you have selected. All the other form tabs and fields remain same both for the default view and the project currency view. Continue to enter values in the fields as you would for the default view.

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Multicurrency fields in project-related forms

When you enable the Project Currency view in Project, Cost Plan, and Cost Plan Breakdown forms, you can observe multicurrency fields in the Financials section of the forms.

Financials tab of the Project form

Project form

Field	Description
Project currency	Currency in which the project is to be implemented. **Note:** The **Project currency** field defaults to the Functional Currency if you modify the currency field and save the Project form without selecting a currency. The **Project currency** field of a project becomes read-only field and cannot be modified once you create a cost plan, cost plan breakdown, benefit plan, benefit plan breakdown, or an expense line for the project.
Total planned cost in project currency	Estimated cost of the project in project currency.
Planned capital in project currency	Capital expenditure (Capex) for the project.
Planned operating in project currency	Operational expenditure (Opex) for the project in project currency.
Budget cost in project currency	Budgeted cost in local currency for the project.
Actual cost in project currency	Actual cost of the project in local currency.
Estimate at completion in project currency	Sum of all actuals for past fiscal periods added to the functional cost for future fiscal periods in project currency.
Planned benefit in project currency	Planned benefit for the project in project currency.
Planned return in project currency	Difference between Planned benefit and Planned cost values.
Planned ROI %	Percentage calculated based on the values in the Planned return and Estimated cost fields.
Net present value in project currency	Present value of future cash in project currency based on the given annual interest rate.
Internal rate of return %	Annual interest rate required to achieve the net present value (NPV) of zero.
Estimate to completion in project currency	Sum of functional cost for all fiscal periods in project currency.

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Preferences section of the Project form

Field	Description
Status report currency	Currency in which the project status report is generated. If you have the Project currency view enabled in the Project form, then you have the choice to generate the project status report using any of the following currency options: • **Functional currency**: Currency obtained from the glide.system.locale property in which the project status report is created. • **Project currency**: Project status report is created in the local currency that is selected. If you select Project currency, you can view the planned cost and actual cost in the selected project currency. To view the status report of the project, see View project status reports.

Financials section of the Cost Plan form

Cost Plan form

Field	Description
Project currency	Currency in which you can create the cost plan.
Cost in project currency	Value that is rolled up from the Entered cost field of all cost plan breakdowns.
Total actual cost in project currency	Value that is rolled up from the **Actual cost** field of all cost plan breakdowns in project currency.
Estimate at completion in project currency	Sum of all actuals for past fiscal periods added to the functional cost for future fiscal periods in project currency.
Estimate to completion in project currency	Sum of functional cost for all fiscal periods in project currency.

Note:
Any change that you make to the unit cost, quantity, or fiscal period of a cost plan has the amounts recalculated in project currency. See Updates in cost plan and recalculation of cost in project currency.

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Multicurrency fields in the Cost Plan Breakdown form

Cost Plan Breakdown form

Field	Description
Exchange rate for project currency	Rate in effect for the period corresponding to the cost plan breakdown in project currency.
Project currency	Local currency selected for the cost plan breakdown.
Cost in project currency	Breakdown amount in project currency.
Actual cost in project currency	Actual cost generated from processed expense lines in project currency.
Variance project currency	Difference between Cost in project currency and Actual cost in project currency.
Budget	Project budget amount entered for a fiscal year gets distributed equally into monthly breakdowns in functional currency.
Budget cost in project currency	Project budget amount entered for a fiscal year gets distributed equally into monthly breakdowns in project currency.

Financials section of the Benefit Plan form

Benefit Plan form

Field	Description
Project currency	Project currency that was selected in the project is populated. Benefit plan attached to a project inherits the same currency as that of the project.
Benefit in project currency	Benefit incurred from project or demand in project currency.

Multicurrency fields in the Benefit Plan Breakdowns form

Benefit Plan Breakdowns form

Field	Description
Project currency	Currency that is selected in the Project form.
Benefit in project currency	Benefit incurred from project or demand in project currency.
Project currency exchange rate	Rate in effect for the period corresponding to the benefit plan breakdown in project currency.
Project currency reference rate	Rate at which the entered currency is exchanged for project currency.

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Multicurrency fields in the Expense Line form

Expense Line form

Field	Description
Project currency	Currency inherited from the project if the project has a related expense line.
Amount in project currency	Expense cost in project currency. Amount entered in the Amount field is converted to project currency.

Multicurrency fields in the Project Funding form

Project Funding form

Field	Description
Capital budget in project currency	Planned expense amount allocated for capital expenditure in the selected currency.
Operating budget in project currency	Operating expense amount in the selected currency.
Budget in project currency	Sum of Capex and Opex amounts. The total project funding budget amount rolls up to the **Budget cost in project currency** field.
Project currency	Currency in which the project is funded.
Exchange rate	Currency conversion based on the exchange rates between currencies.
Exchange rate date	Date on which the exchange rate is applied.
Exchange reference date	Budget Reference Rate from where the exchange rate is retrieved.

Project currency in cost and benefit plans

The currency fields in cost and benefit plans defaults to the project currency of the project.

Entered currency field in cost and benefit plans

The **Entered Currency** field of the cost plan defaults to the project currency of the project if multicurrency plugin is installed, irrespective of the views – default or functional currency. However, if multicurrency plugin is not installed, the **Entered currency** field of the cost plan defaults to the functional currency of the project.

Similarly, the **Entered Currency** field of the benefit plan defaults to the project currency of the project if multicurrency plugin is installed, irrespective of the views – default or functional currency. However, if multicurrency plugin is not installed, the **Entered Currency** field of the benefit plan defaults to the functional currency of the project.

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Related topics

- Enable project currency view in project-related forms
- Updates in cost plan and recalculation of cost in project currency
- Multicurrency in Project Management

Updates in cost plan and recalculation of cost in project currency

If the unit cost, quantity, or fiscal period of a cost plan are updated, then all the related amount fields in the cost plan, its breakdowns, and the project to which it is rolling up are recalculated in project currency.

Changes in Unit cost, Quantity, and Recurring check box of a cost plan

When you modify the **Unit cost** field, **Quantity** field, or **Recurring** check box of the Cost Plan form, the Total planned cost is recalculated in project currency. Similarly, the **Cost in project currency** in the Cost Plan Breakdown is also recalculated. Therefore, the values in the **Planned capital in project currency**, **Planned operating in project currency**, and the **Total planned cost in project currency** fields of the project are also recalculated.

Changes in the fiscal period of a cost plan

When you change the fiscal period, either the start or end dates in the Cost Plan form, the **Total planned cost** and the **Cost in project currency** of the cost plan are recalculated. Therefore, the Cost Plan Breakdown records may be added or removed. If the **Recurring** check box is not selected, then the **Cost in project currency** of each Cost Plan Breakdown record is recalculated. In line with this, the values in the **Planned capital in project currency**, **Planned operating in project currency**, and the **Total planned cost in project currency** fields of the project are also recalculated.

Changes in the entered cost of a cost plan

If you change the **Entered cost** in an individual Cost Plan Breakdown record, then the **Total planned cost** of the cost plan is recalculated in project currency. Therefore, the values in the **Planned capital in project currency**, **Planned operating in project currency**, and the **Total planned cost in project currency** fields of the project are also recalculated.

Addition of breakdowns to a cost plan

If you manually add cost plan breakdowns to a cost plan, then the **Total planned cost** of the cost plan is recalculated in project currency. Therefore, the values in the **Planned capital in project currency**, **Planned operating in project currency**, and the **Total planned cost in project currency** fields of the project are also recalculated.

Track project budget in project currency

Allocate budget to a project and enter amounts for capital expense budget (Capex) and operating expense (Opex) budget in project currency. The sum of the Capex and Opex budgets are calculated as total budget in project currency.

Before you begin

Role required: it_portfolio_manager

About this task

Allocate budget in a similar manner as you do with functional currency. For more information, see Allocate budget to a project.

Enable the project currency view of the Project form to allocate budget in project.

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Procedure

1. Click the Project Budget related link of the Project form.

Project Budget form

Field	Description
Currency	Currency in which budget is allocated for a project. If you activate multicurrency plugin, then you have the option to budget in project currency or functional currency.
Capex Budget in Project Currency	Planned expense amount allocated for capital expenditure in the selected currency.
Opex Budget in Project Currency	Operating expense amount in the selected currency.
Total Budget in Project Currency	Sum of Capex and Opex amounts. The total project funding budget amount rolls up to the **Budget cost in project currency field**.

2. Click **OK**.
3. Click the Project Budget related list to update or view the record.

What to do next

The project target and budget expense values for both capital and operating expenses for a single fiscal period is stored in the Project Funding [project_funding] table. When you update the project funding record, the amounts are converted to project currency.

Cost rollup in project currency

Cost rollup calculation in projects and sub-projects with different currencies varies with the budget reference rate. The rate at which the amount is converted depends on the conversion rate.

Convert amount entered in functional currency fields to project currency

When you create a project in functional currency of the Default view, you can manually enter or update the amount in the **Planned capital**, **Planned operating**, **Actual cost**, and **Planned benefit** fields. As you enter values in these fields, the amount is converted to project currency and stored in the corresponding project currency fields such as **Planned cost in project currency**, **Planned operating in project currency**, **Actual cost in project currency**, and **Planned benefit in project currency** fields.

Note:
You can do so only if the project does not have a cost plan, benefit plan, or expense lines attached to it.

Roll up project financials from sub-projects to parent projects

Use the *com.snc.project.multicurrency.rollup_if_different* property for financial rollups when the sub-projects and parent project have different project currencies.

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Multicurrency cost rollup property behavior

Property flag	Behavior
True	If the property is set to True, then you can: **1.** Associate a sub-project to a parent project, where both the projects have different project currencies. **2.** Roll up the sub-project amounts to the parent project amounts. However, the accuracy of the rolled up amount in the parent project varies because of the currency variation. ○ If the project currencies of the parent project and the sub-project are the same, then the project currency amounts from the sub-projects to its parent and the top project are rolled up by adding up the amounts in the sub-project, and the rolled up amount is accurate. ○ If the project currencies of the parent project and the sub-project are different, then all the costs of the sub-projects are converted to the project currency of the parent or the top project, referencing the Budget Reference Rate. The rate at which the amount is converted depends on the exchange rates between the project currencies, and the specified time period at which the conversion is made. Hence, the rolled up amount is only an estimate or an approximate value.
False	If the property is set to False, then you can: **1.** Associate any number of sub-projects to a parent project, where the project currencies are same or different. **2.** Roll up only if the project currencies of the sub-project and the parent project match.

However, the behavior of *com.snc.project.multicurrency.rollup_if_different* property is different when flagged along with *com.snc.project.rollup.cost* property.

Multicurrency cost rollup property in combination with functional currency property

Properties flag	Behavior
com.snc.project.rollup.cost property is false	You can associate any sub-projects with parent project that have same or different

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Multicurrency cost rollup property in combination with functional currency property (continued)

Properties flag	Behavior
	project currency but the costs of sub-projects do not roll up to the parent project.
com.snc.project.rollup.cost property is true and *com.snc.project.multicurrency.rollup_if_different* property is false	You can associate sub-projects with parent project that has the same project currency.
com.snc.project.rollup.cost property is true and *com.snc.project.multicurrency.rollup_if_different* is true	You can associate any sub-project that has the same or different project currency with the parent project.

Illegal association of properties and possible errors

Following are the possible errors that may occur while making an illegal association:

Property combinations for sub-project and parent project association

com.snc.project.rollup.cost	com.snc.project.multicurrency.rol	Behavior
False	Either true or false	Can associate sub-project to parent project even though project currency of sub-project and parent project is different but costs from sub-project to parent project cannot be rolled up.
True	False	Cannot associate sub-project to parent project if project currency of the sub-project and parent project is different. In such case of an association, an error message: `System policy does not allow parent and child projects to have different project currency` pops up.

Quick start tests for PPM Standard Multicurrency

Validate that PPM Standard Multicurrency still works after you make any configuration change such as apply an upgrade or develop an application. Copy and customize these quick start tests to pass when using your instance-specific data.

Project currency quick start tests require activating the PPM Standard Multicurrency – ATF Tests plugin (com.snc.ppm_multicurrency.atf).

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Product currency test suite tests

Test	Description	Release version
Verify cost in project currency on cost plan	Validate the calculation of cost line breakdown with budget reference rate and verify roll up to cost plan and also for the project in project currency.	Orlando
Verify benefit in project currency on benefit plan	Validate the calculation of benefit line breakdown with budget reference rate and verify roll up to benefit plan and also for the project in project currency.	Orlando

Related topics

Quick start tests

Upgrade existing projects on activating multicurrency plugin

Execute the *PM upgrade project currency for active projects* and *PM upgrade project currency for inactive projects* scheduled jobs to upgrade your active and inactive projects, respectively, after you activate the multicurrency plugin. Select the scheduled jobs and run them on demand to upgrade your projects in project currency only when necessary.

Before you begin

Role required: admin or it_project_manager

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Click the *PM upgrade project currency for active projects*.
3. Click **Execute Now** to upgrade all your existing active projects to project currency.

   On execution of the job, all amounts in the cost-related fields of the Project, Project Task, Baseline, Cost Plan, Cost Plan Breakdown, Benefit Plan, Benefit Plan Breakdown forms are copied from functional currency to project currency fields. Once the values of functional currency fields are copied to the project currency fields project currency cannot be edited since the financial costs already exist.
4. To upgrade your inactive projects, click *PM upgrade project currency for inactive projects*.
5. Click **Execute Now**.

   On executing the scheduled job, the project currency value for all existing projects is set to the functional currency. The project currency in the Project Tasks, Baselines, Cost Plans, Cost Plan Breakdowns, Benefit Plans, Benefit Plan Breakdowns, Expense Lines forms is set to functional currency.

Note:
The jobs may have performance impact depending on the number of projects and cost plans, hence run the jobs only when necessary.

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Project import and export

You can manage projects using both Microsoft Project and the ServiceNow Project Management application.

Project Import

Users with it_project_manager role can import projects and project tasks from Microsoft Project into ServiceNow Project Management.

Create a project or update an existing project by importing the project data from Microsoft Project into your ServiceNow instance. For more information, see Project import from Microsoft Project.

While importing a project into your ServiceNow instance, you can also specify the calculation method for calculating project dates. You can import the project tasks with different constraint types using Manual or Automatic calculation. For information about supported constraints and their conversion, see Project import from Microsoft Project.

You can create custom fields in your ServiceNow instance and map these fields with your Microsoft Project while importing a project. For more information, see Create custom field mapping for Microsoft Project file import.

You can import project tasks for multiple projects in one time using data files and transform maps. For more information, see Import project tasks for multiple projects.

Some calendar elements are not imported from Microsoft Project into Project Management. For information about calendar elements and schedules, see Calendars and schedules- Limitations.

Project Export

If you have the it_project_manager role, you can export project data. The project data, such as project tasks and task constraints, can be exported as an export file. Use this export file to import the projects into other ServiceNow instances.

If you are managing your projects using Microsoft Project, you can export your ServiceNow projects using the export functionality.

You can choose to export the project data in MPP, XML, or CSV file formats. For more information, see Project export to Microsoft Project.

If your project in the ServiceNow instance contains dates with any of the supported constraint types, then these constraints are also exported when you export the project and project tasks. For more information, see Project export to Microsoft Project.

Supported versions

Projects created in the following versions of Microsoft Project can be imported into the ServiceNow Project Management application.

- Microsoft Project 2003
- Microsoft Project 2007
- Microsoft Project 2010
- Microsoft Project 2013
- Microsoft Project 2016

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Calendars and schedules- Limitations

Some calendar elements from Microsoft Project are not imported into the Project Management application.

- Project calendars
- User calendars
- Schedules

The imported project uses the default schedule of a Monday to Friday workday from 8 A.M. to 5 P.M. with an hour break for lunch, starting with the v3 application.

Project field mapping

During an import, values from Microsoft Project overwrite fields in project records.

Project Field Mapping

Microsoft Project fields	Project Management fields
Task Name	Short description. The field is overwritten only while you import the first time.
Note	Description
Start	Planned start date
Finish	Planned end date
Duration	Planned duration
Actual Start	Actual start date
Actual Finish	Actual end date
Actual Duration	Actual duration
% Complete	Percent complete (personalize the form to add this field)
Predecessor Lag	Lag time between predecessor and successor
WBS	WBS
Critical	Critical path
Rollup	Rollup
Text10 (Field used for syncing purposes)	Task Sys_Id
Project Header Title	Project name
Project Header Subject (Field used for syncing purposes)	Top Task Sys_Id
Resource	Assigned to [assigned_to]

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Project Field Mapping (continued)

Microsoft Project fields	Project Management fields
	Note: During import, if there are multiple resources assigned to a task in Microsoft Project: • The first resource is added to the **Assigned to** field. • The rest of the resources are added to the **Additional assignee list** field.
Resource Group	Assignment Group

Create custom field mapping for Microsoft Project file import

Map custom fields from Microsoft Project to ServiceNow fields before importing a project.

Before you begin

Create custom fields in your ServiceNow instance before mapping them with Microsoft Project. For more information, see Add and customize a field in a table.

Role required: it_pps_admin

About this task

Map the custom fields that you create in your ServiceNow instance with custom fields in the Microsoft Project file you plan to import.

The supported data types for field mapping between Microsoft Project and ServiceNow instances are:

- True/False
- Calendar
- Date/Time
- Choice
- Color
- Currency
- Decimal
- Due Date
- Floating Point Number
- Date
- Date/Time
- Duration
- List
- Time
- HTML
- Integer
- Long

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- Percent Complete
- Phone Number (E164)
- Reference
- Name -Value Pairs
- String
- Translated HTML
- Translated Text
- URL
- Wiki

Procedure

1. Navigate to **All** > **Project Administration** > **Project - MSP Import Field Mappings**.
2. Click **New**.
3. From the Table list, select the table in which you created the custom field.
4. In the **Microsoft Project Column** field, enter the name of the custom field in your Microsoft Project file that you want to map.
5. In the Destination Column list, select the custom ServiceNow field that you want to map to the Microsoft Project field while importing a project.
6. Click **Submit**.

What to do next

- Import the Microsoft Project file. For more information, see Import a Microsoft Project file with the Import module.
- Configure the Project form to add the custom fields that you want to see. For more information, see Form configuration .

Project import from Microsoft Project

Import Microsoft project files into the ServiceNow Project Management application.

Users with the project manager role can import a project using:

- Import module
- Project form
- Planning Console

When you import a project as a new project or into an existing project, the projects are updated as follows:

- New project: A new record is created in the Project [pm_project] table. The tasks associated with the project are added to the Project Task [pm_project_task] table.

  Only the common or mapped fields are imported. Imported projects are brought into the instance with both Priority and Risk set to Low.

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- Existing project: The instance checks the Text10 field in the top-level Microsoft Project task. If the Text10 field contains a recognizable sys_id, it means that the project was previously exported from a ServiceNow instance. In this case, the values from the project overwrite the values for the existing project.

You can also specify the schedule calculation type as **Automatic** or **Manual** for the imported tasks. When you import a project into the instance, project constraints are converted as follows:

- The time constraint for all imported tasks, when you select calculation type as **Manual**, is set to **Start on specific date** irrespective of their constraint type in Microsoft Project.
- The following constraint types are supported when you select calculation type as **Automatic**:
  - **Start on specific date**
  - **As soon as possible**
  - **Start no later than**
  - **Start no earlier than**

  Tasks with other constraint types are converted to **Start on specific date**.

Note:
The resource name in Microsoft Project should map to the name of the user in the instance.

Import a Microsoft Project file with the Import module

Use the Import module to import a Microsoft project file as a new project into the Project Management application.

Before you begin
Role required: it_project_manager

About this task
Before importing a Microsoft Project file into the ServiceNow instance, consider the following information.

- Microsoft Project project imported into a teamspace is only available to users who can access the teamspace.
- To import custom fields in your Microsoft project, create those custom fields in your ServiceNow instance first, and then create mapping between these fields before importing the project. For more information, see Create custom field mapping for Microsoft Project file import.

  Note:
  You can also use the Scripted Extension Points for importing custom fields without creating and mapping the custom fields manually. Use the *MSProjectImportTaskFormatter* Extension Point to create a script include and map custom fields in Microsoft Project and ServiceNow. You can also use this Extension Point to modify the data while importing a project.

- If the calculation type is set as **Manual**, recalculation does not happen on project tasks when they are imported from the Microsoft Project file. Once the project is in the ServiceNow system, it would be treated as a manual project.
- Importing a Microsoft Project project with inter-project dependencies, does not import the shadow tasks.
- Only the subprojects (header and parent task) get imported into the ServiceNow instance, the child tasks are not imported.

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- While importing a Microsoft Project file into ServiceNow, the import fails:
  - If the project with tasks was created in ServiceNow instance before the import.
  - If you reimport a project that was imported from Microsoft Project file earlier and you create and add tasks in ServiceNow instance.

    Note:
    To retain the project tasks that were created in the ServiceNow instance, you must export that project first into the Microsoft Project file. Then, reimport the file back into ServiceNow instance.

  - If the task being deleted due to import has any of the related entities: Cost plan, Benefit plan, Resource plan, Time card, or Expense lines.
  - If the values for lag or lead time dependencies are not in the supported format.
    - Positive lag time dependency values for days, hours, and minutes are allowed. Negative lag time dependencies are allowed only for days.
    - All other elapsed duration types from Microsoft Project such as emin, eday, eweek, emon, eyr, or % are not allowed for import.

Procedure

1. Navigate to **All** > **Project** > **Projects** > **Import**.
2. Click **Choose File** to select a Microsoft Project (mpp) file.
3. To import the Microsoft project as a new project, select the **Create new project** option.
4. **Optional:** In the **Project name** field, specify a name for the new project.
5. To import the Microsoft project as a subset of an active, existing project:
   a. Select **Update an existing project**.
   b. Click the reference lookup icon () and select a project or task.
   Only active projects appear in the list.
6. Select one of the following options to specify the method for calculating schedule:
   - **Automatic**: Select this option to apply the scheduling engine while importing the project tasks. The supported constraint types are imported with same constraints applied to them while other constraint types are converted to **Start on specific date**.
   - **Manual**: Select this option to import all project tasks with **Start on specific date** constraint type irrespective of their constraint type in Microsoft Project.

   For more information about supported constraint types, see Project import from Microsoft Project.
7. Click **Import**.

Result

- A project task that was imported in ServiceNow instance earlier and has associated time cards, resource plans, cost plan, benefit plan, or expense lines is retained on reimport even if it is deleted from Microsoft Project.
- Dates in the ServiceNow project remain same as the dates in the Microsoft Project file.
- In a ServiceNow project with subprojects, the following details change:

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- The WBS order of imported tasks is regenerated after import.
- The **Planned Start Date** and **Planned End Date** of the parent project are rolled up.
- The **State** of the parent project and tasks are rolled up.
- The % Complete on the top task is rolled up.

Update a project using a Microsoft Project file

Import project data, from a Microsoft Project file, into an existing project in your ServiceNow instance using the Project form or Planning Console.

Before you begin

Create a project.

Role required: it_project_manager

Procedure

1. Navigate to **Project** > **Projects** > **All**.
2. Open the project which you want to update.
3. Import the Microsoft Project file to update the selected project from any of the following screens:
   - In the Project form, select **Import from MS Project** from the context menu.
   - In the Planning Console, click the more actions icon ( ) and select the **Import from MS Project** option.
4. In the Microsoft Project Import dialog box, select the Microsoft Project file and calculation type:
   a. Click **Choose File** to select a Microsoft Project (mpp) file.
   b. Select one of the following options to specify the method for calculating the schedule:
      - **Automatic**: Select this option to apply the scheduling engine while importing the project tasks. The supported constraint types are imported with the same constraints applied to them while other constraint types are converted to **Start on specific date**.
      - **Manual**: Select this option to import all project tasks with the **Start on specific date** constraint type irrespective of their constraint type in Microsoft Project.

      For more information about the supported constraint types, see Project import from Microsoft Project.
5. Click **Import**.

Result

- A project task that was imported in the ServiceNow instance earlier and has associated time cards, resource plans, cost plan, benefit plan, or expense lines is retained on reimport even if it is deleted from Microsoft Project.
- Dates in the ServiceNow project remain same as the dates in the Microsoft Project file.
- In a ServiceNow project with subprojects, the following details change:
  - The WBS order of imported tasks is regenerated after import.
  - The **Planned Start Date** and **Planned End Date** of the parent project are rolled up.

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- The **State** of the parent project and tasks are rolled up.
- The **% Complete** on the top task is rolled up.

Import project tasks for multiple projects

Import project tasks for multiple projects from an external file system or data source using import sets and transform maps.

Before you begin

Role required: import_transformer, import_admin, or admin

Procedure

1. Navigate to **All** > **System Import Sets** > **Load Data**.
2. Select the **Existing table** option.
3. From the Import set table list, select the **Import planned task [imp_planned_task]** option.
4. In the **Source of the import** field, select File, and then click**Choose File** to select the source Excel spreadsheet.
5. **Optional:** If required, specify the Work sheet and Header row number.
6. Click **Submit**
   The imported data is available in the selected Import Set table.
7. **Optional:** Create field mappings for custom columns.
   For more information, see Create field mappings.
8. Transform the data from the import set table to the target table.
   For more information, see Run an import.

Project export to Microsoft Project

If you are using Microsoft Project to manage project activities, you can export a project to Microsoft Project (mpp) file, an XML file, or a CSV file.

Users with the project manager role can export a project using:

- Export module
- Project form
- Planning Console

You can also specify the format in which you want to export project data, the available options are:

- **XML**: Suitable, if you want to import the project data into other ServiceNow instance.
- **CSV**: Suitable for exporting project data from Planning Console as is and viewing project data using other applications.
- **Microsoft Project**: Suitable, if you want to import the project data into Microsoft Project.

> **Note:**
> The option for exporting project data in CSV and Microsoft Project format is available when exporting a project from Planning Console.

If tasks in your project contain any of the supported constraints, then the constraints are also exported when you export the project. This export of constraints helps you in maintaining project dates when you import the project to another ServiceNow instance. The following constraints are supported:

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- **Start on specific date**: Mapped with Must start on constraint when exported to Microsoft project.
- **As soon as possible**
- **Start no later than**
- **Start no earlier than**

Note:
Shadow tasks and external dependencies are not exported when you export the project data.

Export project data

Export the project data using the Export module, Project form, or Planning Console. Save the export file to a folder on your system in the Microsoft Project (MPP), XML, or CSV format.

Before you begin
Role required: it_project_manager

About this task
Projects must use either the Project Management Schedule or the Default MS Project schedule before they can be exported.

The option for exporting the project data in MPP and CSV format is available when exporting a project from the Planning Console. Only the columns which are visible in the Planning Console are exported.

Procedure

1. Export the project data from any of the following options.

2. **Optional:** A dialog box might prompt you to save the export file.
   Save the file as an XML file. If you are exporting the project from the Planning Console and selected the CSV option, you can save the file in CSV format.

   Note:
   Depending on your browser setting, the browser might automatically save the file to your Download folder.

What to do next

- Use the MPP file to import the project data into a Microsoft Project.
- Use the XML file to import the project data into other ServiceNow instances or Microsoft Project.
- Use the CSV file to view project data using other applications.

Export project tasks

The task being exported must be associated with a project that uses either the Project Management Schedule or the Default MS Project schedule.

Before you begin
Role required: it_project_manager

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Procedure

1. Navigate to **Project** > **Projects** > **All**.
2. Open the project.
3. Scroll to the **Project Tasks** related list and click a task number to open the Project Task form.
4. Right-click the form header and select **Export Task to MS Project** from the context menu.

   The task is exported to a folder on your system.
5. Open Microsoft Project to import the exported project task files.
   Refer to Microsoft product documentation for instructions.

Project reporting

Get an at-a-glance view of projects with reports, the portfolio dashboard, and project views. You can see information such as projects with slipped milestones, graphs of resources by project, and projects listed by percentage complete.

Note:
Much of information available on reports, dashboards, and views is customizable. The examples below derive from default settings.

The application provides several global reports, both lists and charts, that show the status of projects at a glance. You can also create custom reports or create reports that can be viewed by certain groups. The following Project Management reports are available in the base system:

- Active Project Unassigned Tasks 30 Days: list report: list report
- Projects (by priority): bar chart
- Projects (by priority): list report
- Projects (by risk): list report
- Projects (by risk): bar chart
- Projects (by state): list report
- Projects (by state): bar chart
- Active projects: list report
- Pending projects: list report
- Active Projects by Manager: bar chart

Related topics

Reporting

Close a project

Closing the project involves more than just changing the project state to closed.

Before you begin
Role required: it_project_manager

About this task
Post-project activities include viewing baselines and actual values to evaluate how much the project slipped from its original estimates. They also include following up on related incidents, problems, or changes that are linked to the project through the instance.

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When you close a project, all project tasks and sub-projects associated with the project are closed automatically. Normally, you should not reopen a project after it is closed. Updating the project state from Closed to Work In Progress, Pending, or Open is not allowed. If you still need to reopen a closed project, reopen an existing project task or add a new task to the project. This action for a task moves the project from Closed to Work in Progress state without affecting the other closed tasks.

You can cancel the associated future resource plans and complete the allocated resource plans for a closed project.

Procedure

1. Verify that the work is completed for all tasks in the project.
2. 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.

   Alternatively, close every project task first, starting with the lowest-level child tasks. The closed states roll up to parent tasks, and when all highest-level parent tasks are closed, the project state changes to closed. However, the default closed states for parent tasks and for the project is **Closed Complete**. Therefore, even if you change any or all project tasks to **Closed Incomplete** or **Closed Skipped**, the project state is changed to **Closed Complete**.

   Also, change the **Phase** value to **Closing**. The project phase is for reference only and is not linked to or dependent on the **State** field.

   If your project contains sub-projects, you can close the sub-project without affecting the parent project. Change the **State** of the sub-project to any closed state to close the sub-project. Closing the sub-project closes or changes the state of all the tasks associated with the sub-project. Also, changing the state of the sub-project to Work in Progress, moves all the associated tasks to Work in Progress state.

   If there are project tasks associated with the parent project that are not closed, the parent project remains in the Open, Work in Progress, or Pending state. If the tasks associated with the parent project are closed, the state of the parent project also changes to **Closed Complete**.
3. After the project is complete, create a final baseline to see how closely the project's actual values came to the estimated values.

   Note:
   Baselines compare only planned start and end date values with actual start and end date values. Use reports to compare the effort and cost.

Result

For projects created from an incident, problem, or change, updating the project state does not automatically update the related incident, problem, or change request record. You must update the related record manually. For example, if the completion of a project also means that a related Change can be closed, go to the Change record and modify its **State** field. It is also a good idea to update the work notes field on the related record to include any relevant information about the project.

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What to do next

- Cancel the resource plans associated with the project in any of the following conditions:
  - There is a corresponding resource plan in the Confirmed, Planning, or Requested state.
  - There is a resource plan in the Allocated state with the start date later than the project end date.
- Complete the resource plans associated with the project in the following conditions:
  - There is a corresponding resource plan in the Allocated state.
  - The start date of the resource plan is on or before the actual end date of the project or task.

View actual project costs

When you are using Project Portfolio Management with Financials, you can view actual project costs on cost plans and projects.

Before you begin

Role required: it_project_manager

About this task

An expense line has to be processed to be considered for actual cost. The actual cost is recorded against the creation date of the expense line, not the processed date. The expense lines are created only for approved time cards.
Actual costs for projects also roll up to portfolios in the same way.

Procedure

1. Navigate to **Project** > **Projects** > **All**.
2. Open the project for which you want to view the actual costs.
3. Click the **Cost Plans** related list.

Actual project costs

Actual project costs come after you create expense lines for cost plans or after human resources use time cards to create expense lines.

Project and project task states

In the base system, the states in project and project task inherit the states in Task table.

The states are grouped into different categories as shown below:

State	Label	Category
-5	Pending	Pending
1	Open	Open
2	Work in Progress	Work in Progress
3	Closed Complete	Closed
4	Closed Incomplete	Closed
7	Closed Skipped	Closed

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The category information for the states is declared in dictionary override of State column in Planned task (`planned_task`) table in **Attributes** field. Planned task is the parent table for project and project task tables.

View default project and project task state categories

View category information for the default project and project task states. In the base system, the states in project and project task inherit the states in Task table.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Dictionary**.
2. Update the filter with the following AND conditions:
   a. **[Table] [is] [task]**
   b. **[Column name] [is] [state]**
3. Run the filter.
4. Click the task table, and then choose **planned_task** table in **Dictionary Overrides** related list.

Result
The **Attributes** field displays different states and the categories for a state as shown below. It also displays the default state value for each category.

```
close_states=3;4;7,default_close_state=3,default_work_state=2,default_open_st
```

Customize a state for project or project task

Add or modify a state of project or project task using dictionary override.

Before you begin
Role required: admin

About this task
As an example, the steps for adding custom states for **Work in progress** state category for Project task are described. In this example,

- the existing **Work in Progress** state is removed and following three new states are added:

State	Label	Category
10	Design	Work in Progress
11	Development	Work in Progress
12	Testing	Work in Progress

- the default **Work in Progress** is kept as `10` (`Design`).

Procedure

1. Define a new dictionary override for `pm_project_task` table under Task - State dictionary.
2. Specify the override attributes for the dictionary override in **Attributes** field as follows:
   `close_states=3;4;7,default_close_state=3,default_work_state=10,default_open`

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Result

- As specified in Step 2, the `default_work_state` is declared as 10 and the `work_in_progress_states` as 10, 11, and 12. Now whenever a project task changes to any of the new **Work in Progress** states, its parent also moves to corresponding **Work in progress** state.

  Suppose that a project task has two children records, and if the first child record moves to **Development** state, the parent also moves to **Development** state. Now if the second child record moves to **Design** state, the two children records under the project task are in two different work in progress states. In such cases, the parent record moves to the default work in progress state. In this case, the parent record moves to **Design** as the `default_work_state` is specified as `10` (`Design`).

- The project states can also be customized using the same steps.

Project Management costing add-on

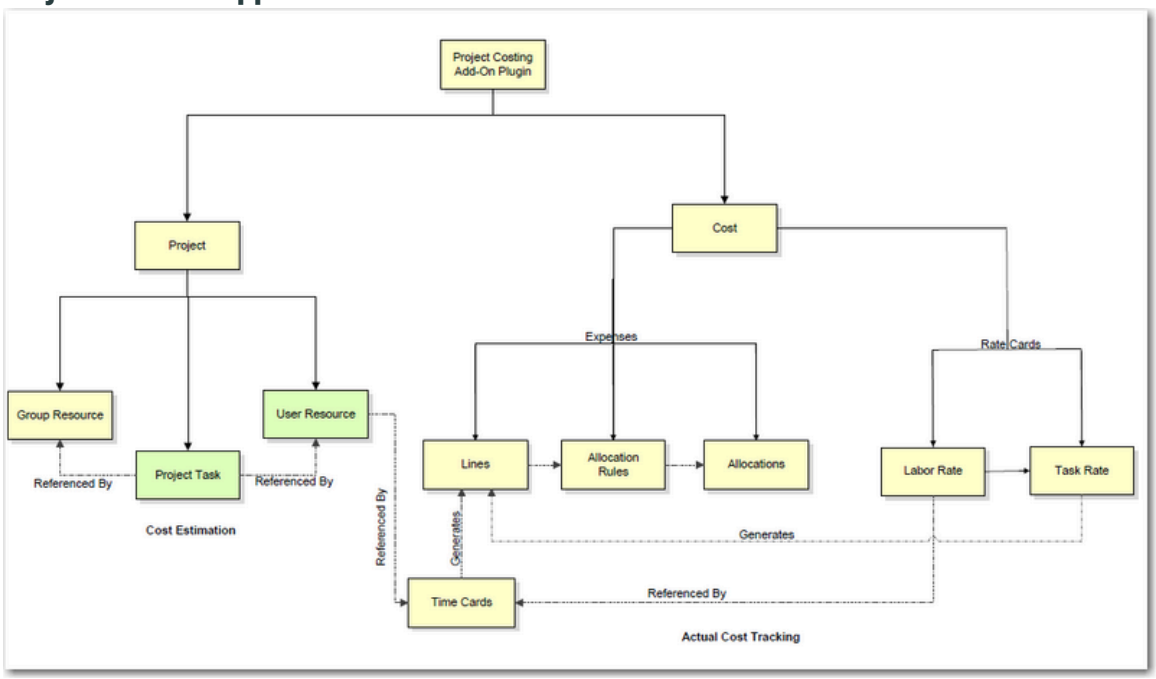
The Project Management costing add-on connects the Project Management application to the Cost Management application to allow for estimating and tracking the costs associated with projects.

This plugin enables the following project costing features:

- Estimate group resource costs during project planning.
- Tracking the actual cost of each user resource for a project.
- Track actual project task costs from time cards and other project expenses.
- Allocate project costs to the business.
- Represent project costs to the CIs that the project affects.
- Rollups of actual task expenses to parent tasks and the project record.

The Project and Cost applications work together as shown in the diagram:

Project and Cost applications



The following properties are available with this plugin:

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Costing add-on properties

Description	Property Name	Notes
For planned tasks types, calculate the actual cost field using the total of expense lines for the task.	glide.cost_mgmt.calc_actual_cost	Default: **true**. This property is from Cost Management. When an expense line is created against any task of **planned_tasktype** and this property is true, the system gets a sum of the costs for all the expense lines and sets the total cost in the **work_cost** field.
When creating a task expense line should the system also create expense lines for the top task?	glide.cost_mgmt.process_task_top_task	Default: **true**
Enable project cost rollup (estimated and actual) - updating the cost of a project task updates the cost of its parent.	com.snc.project.rollup.cost	Default: **true**

The following business rules are added or modified with this plugin:

Costing add-on business rules

Name	Table	Description
Project Cost Rollup	Planned task [planned_task]	Default: **true**. This property is from Cost Management. When an expense line is created against any task of **planned_tasktype** and this property is true, the system gets a sum of the costs for all the expense lines and sets the total cost in the **work_cost** field.
Process Top Task Parent	[fm_expense_line]	Default: **true**

Activate project task email notifications

The following email notifications for the Project Management application are available by default, but are inactive. You must activate them manually.

Before you begin

Role required: admin

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Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
2. Activate the following notifications:

Email Notifications

Notification	Table	Field	Condition	Description
Project task assigned	pm_project_task	Assigned to	Inserted or updated	Sends an email notification when a task is assigned to a resource or the assigned resource is changed.
Project task started	pm_project_task	State	Changes to **Work in Progress**	Sends an email notification when the project task starts.
Project task commented	pm_project_task	Additional comments	Any changes occur	Sends an email notification when the comment field is updated.

Set up project notifications with the workflow tool

Use the workflow tool, for example, to set up a workflow that sends an email notification when the state of a project task becomes **Work in Progress**.

Before you begin
Role required: admin

Procedure

1. Create a workflow with the following attributes:
   - **Name:** Notify assignee
   - **Table:** Project task [pm_project_task]
   - **If condition matches:** Run if no other workflows matched yet
   - **Condition:** State is **Work in Progress** and **Assigned to** is not empty

   Note:
   Do not modify other attributes in this example.

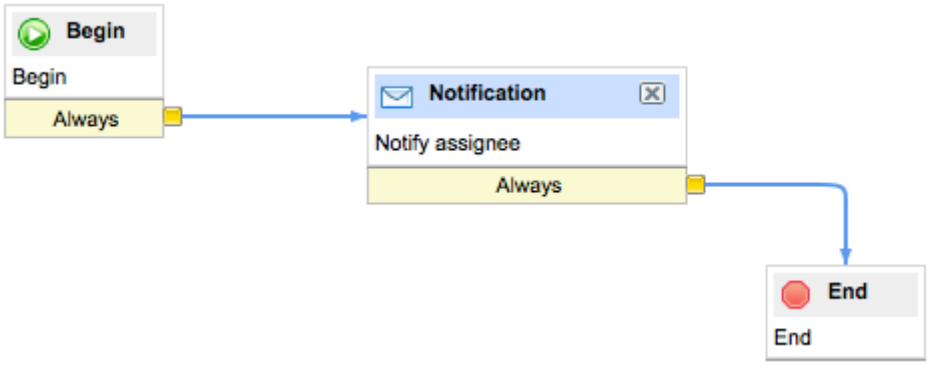
2. Add a single Notification activity between the Start and End activities.

   Drag the activity onto the connector line until it changes color. The attributes of the activity are similar to the following example:

   - **Name:** Notify assignee
   - **To:** ${assigned_to}
   - **Subject:** Project task ${number} has been activated and is assigned to you
   - **Message:**Project task ${number} has been activated and is assigned to you
     - Number: ${number}
     - Short description: ${short_description}
     - Planned start date: ${start_date}

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- Planned end date: ${end_date}
- Planned duration: ${duration}



Project Status app

The Project Status mobile app enables you to track the status of your projects, collaborate with stakeholders to resolve exceptions, and take timely actions regardless of your location.

You can use the Project Status features to do the following:

- View the latest status of your projects
- View the latest status report of your projects
- Review risks and decisions
- Collaborate with other stakeholders on a project
- Receive mobile notifications when the project status changes or other users add comments or notes

Activation information

The Project Status mobile application runs on the ServiceNow® mobile platform. To enable the Project Status app, activate the PPM Mobile plugin (com.sn_ppm_mobile) if you have the admin role.

Activate Mobile Project Status

You can activate the Mobile: Project Status application from ServiceNow Store, earlier known as PPM Mobile (com.sn_ppm_mobile), if you have the admin role. Installing this application also activates related plugins if they are not already active.

Before you begin
Role required: admin

About this task
Mobile: Project Status activates the following related plugin if it is not already active.

Plugin for PPM Mobile

Plugin	Description
Project Portfolio Suite with Financials [com.snc.financial_planning_pmo]	Enables you to manage your demands, resources, portfolios and projects. It also helps you plan, track, and manage the cost and budget of projects and demands

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Plugin for PPM Mobile (continued)

Plugin	Description
	in a portfolio to strike a balance between investment and returns.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

   Note:
   When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Related topics

List of plugins (Xanadu)

Get started with Project Status app

Access project status and status reports on the Project Status mobile app to review your project status and collaborate with stakeholders regardless of your location.

Before you begin

- Download the Mobile Agent mobile application on an iOS platform from the Apple App Store or on an Android platform from the Google Play Store.
- Activate the PPM Mobile plugin.

Role required: admin

Procedure

1. Open the mobile app and tap the plus icon ( ).
2. Add a ServiceNow instance and enter the credentials to login.
   You do not need to include `service-now.com` at the end of the instance name.
3. **Optional:** You can give a **Nickname** to your instance for easy identification.
4. Tap **Project Status** ( ) to get started with tracking your projects.

Related topics

Agent mobile app

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View project details on the mobile app

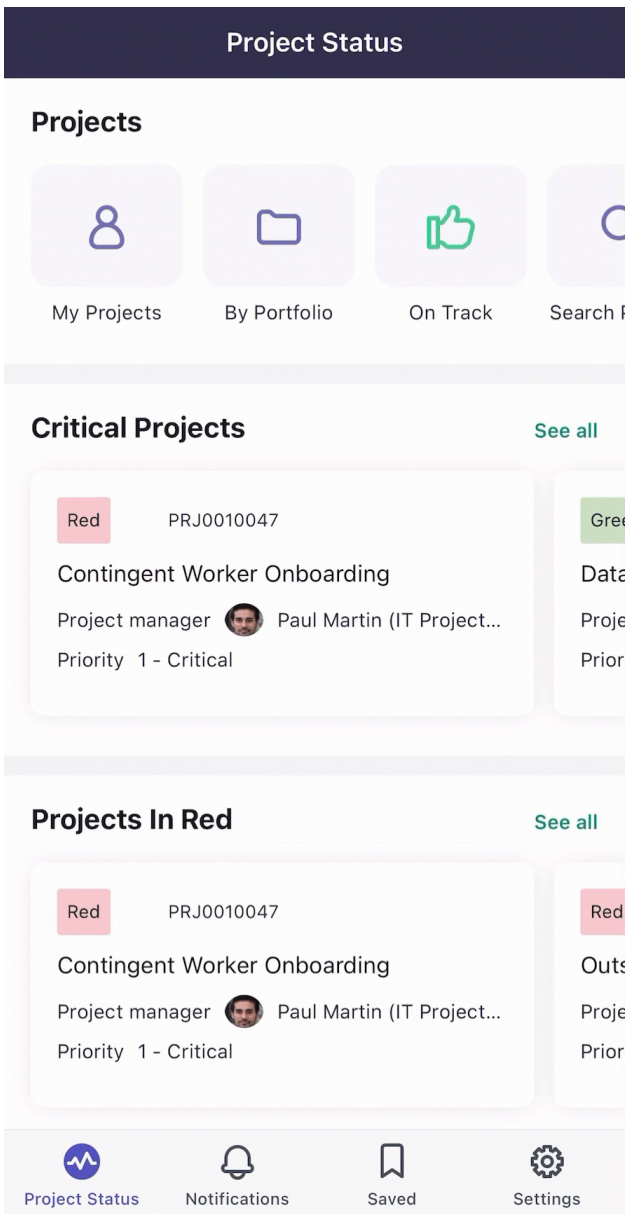
You can view the status of a project and other project details such as financial data, status reports, risks, and decisions through the mobile app.

Before you begin

Role required: portfolio_manager or project_manager or program_manager

Procedure

1. Navigate to the Project Status application on your mobile app.
2. Open a project for which you want to view the details using one of the following options.
   - Tap to open an applet and then tap on a project.
   - Tap on the **Search Projects** applet to find a specific project.
   - In the **Critical Projects** or the **Project in Red** lists, tap on a project.



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View project status report

You can view the status of a project such as overall progress, executive summary, financial data, and RIDAC records through the mobile app.

Before you begin

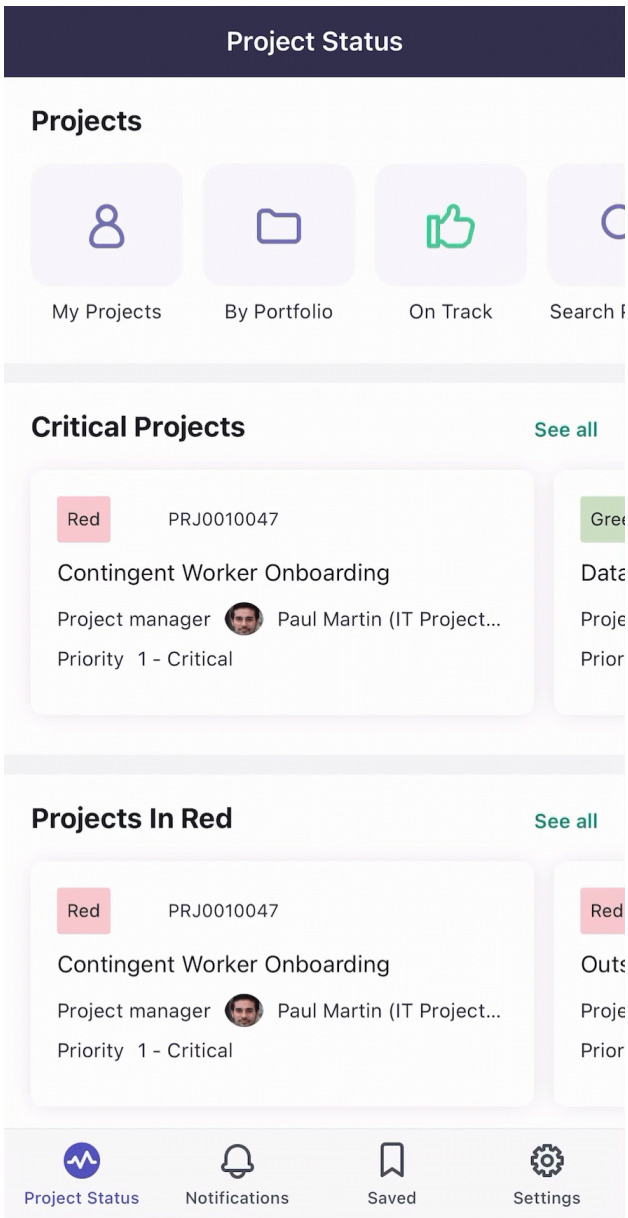
Role required: portfolio_manager or project_manager or program_manager

Procedure

1. Navigate to the Project Status application on your mobile app.
2. Open a project for which you want to view the project status report using one of the following options.
   - Tap **My Projects** () applet to view your projects.
   - Tap on the **Search Projects** () applet to find a specific project.
   - In the **Critical Projects** or the **Project in Red** lists, tap on a project.
3. Tap the project card to view its status report.

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- The **Status** tab displays the summary of project such as overall health of the project, executive summary, achievements, and key activities planned for the project.
- The **Details** tab displays status and details of information related to schedule, scope, cost, and resources for the project.



Create RIDAC (Risk, Issues, Decisions, Actions, and Request Changes) records

You can create Risk, Issues, Decisions, Actions, and Request Changes records for your project through the mobile app.

Before you begin

Role required: portfolio_manager or project_manager or project_user

About this task

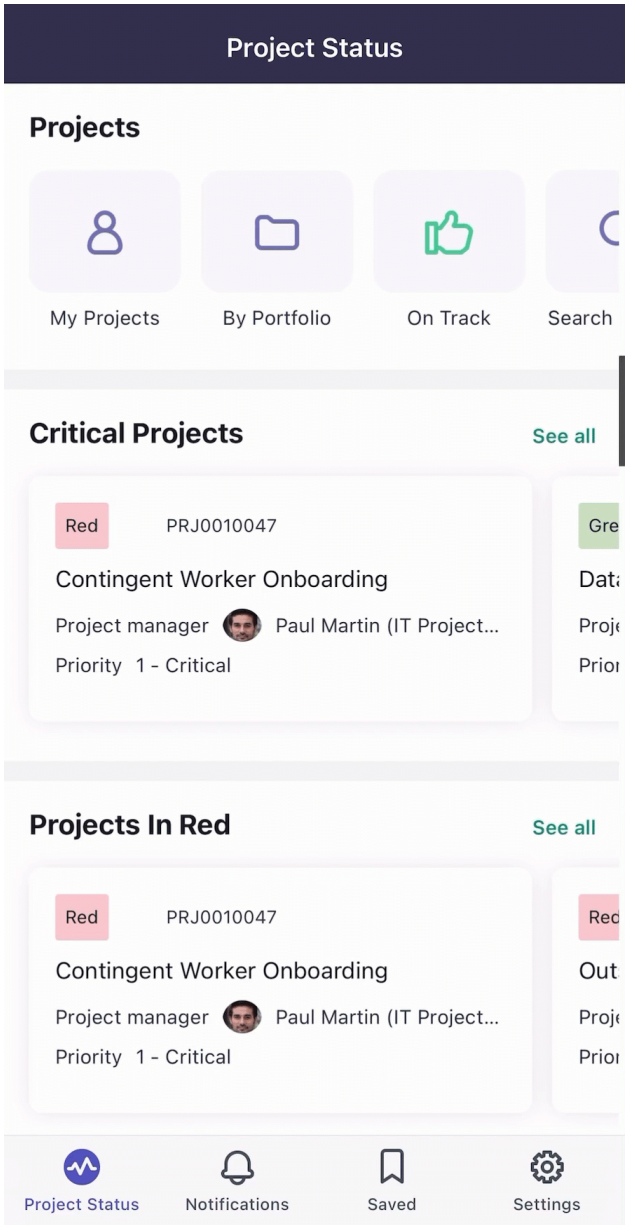
Analyze the impact of the risks on the project and create RIDAC records to track risks, issues, and their probable resolution for planning future projects. For more information see, RIDAC records for a project in Project Workspace.

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Procedure

1. Navigate to the Project Status application on your mobile app.
2. Open a project for which you want to create a RIDAC record using one of the following options.
   - Tap to open an applet and then tap on a project.
   - Tap **My Projects** applet to view your projects.
   - Tap on the **Search Projects** applet to find a specific project.
   - In the **Critical Projects** or the **Project in Red** lists, tap on a project.
3. Create a RIDAC record using one of the following options.
   - Tap the more action icon () and select one of the options:
     - New Risk
     - New Issue
     - New Decision
     - New Action
     - New Request Changes

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4. Based on the option that you selected, fill in the fields on the form.

5. Alternatively, open a RIDAC record and create a new RIDAC record.

   - **a.** Tap the **RIDAC** tab.
   - **b.** Tap the right arrow for a RIDAC record to view its details, tap the more action icon (...), and then tap **New Risk**, **New Issue**, **New Decision**, **New Action**, or **New Request Changes** option based on the selected record.
   - **c.** Fill in the fields on the form.

Collaborate with project stakeholders

Collaborate with the project manager and other stakeholders on a project to provide project updates, share documents, or send emails through the mobile app.

Before you begin
Role required: portfolio_manager or project_manager or project_user

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Procedure

1. Navigate to the Project Status application on your mobile app.
2. Open a project for which you want to view the details using one of the following options:
   - Tap on the **Search Projects** applet to find a specific project.
   - In the **Critical Projects** or the **Project in Red** lists, tap on a project.
3. Collaborate with the project manager and other stakeholders on a project status report in any of the following ways:
   - Add activities to a project status report such as the ability to add work notes or comments, select and upload a picture, or attach photos and files.
     a. Tap the **Activity** tab.
     b. Tap the add activity icon () and select one of the options:
        - Add Work Notes
        - Add Additional Comments
        - Open Camera
        - Open Library
        - Attach File
   - Send an email to the project manager for additional details of the project.
     a. Tap the **Details** tab.
     b. Tap the send email icon ().
     c. In the email application, compose the email, add addresses, and send.

        By default, the **To** field is populated with the email ID of the project manager. You can add other stakeholders.

Result

When you add an activity or change the status in a project, the project manager receives a mobile notification. The project manager should have installed the Project Status app and enabled notifications to receive notifications on the mobile device.

PPM Collaboration

Collaborate with your project team on a common enterprise messaging platform such as Slack or Microsoft Teams using the PPM Collaboration application. Facilitate active and timely communication about the project among the project's team members, be involved in critical discussions on your project, and receive real-time updates on the project's status.

By using a project-specific channel on Slack, or a team on Microsoft Teams, decisions taken or updates made for the project would effectively reach all the team members. The team would have easy access to its past communication through the chat history and shared project documents all at one place. By doing so, the project manager and the team members can save the time spent on emails and other offline communication.

PPM Collaboration advantages

A project collaboration channel or team provides the following advantages for the project managers and the team members:

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PPM Collaboration advantages for project managers and team members

Project Manager	Team member
• Start your day with a detailed status of the project that you're managing • Using the status details, choose to follow up with relevant team members through your preferred mode of communication • Open the project directly from the collaboration channel or team to drill down into further details	• Communicate with the team members to resolve an issue you're facing • Receive status updates from the team members • Contribute to the discussions regarding the project

- Real-time updates on changes to milestones, risks, issues, decisions, actions, and change requests (RIDAC), and project financials.
- Automatic addition and removal of members of the collaboration channel or team based on who the project tasks are assigned to.

Note:
PPM Collaboration is not supported for teamspaces.

Install PPM Collaboration

Install the PPM Collaboration (sn_ppm_collab) application from ServiceNow Store.

Before you begin

- Complete the following setup checklist for a smooth installation and configuration.

Note:
If you are enabling collaboration with Slack, the Slack spoke v2 plugin must be activated. If you are enabling collaboration with Microsoft Teams, the Microsoft Teams Graph and Microsoft Azure AD spokes must be activated. Collaboration cannot be enabled for both Slack and Microsoft Teams for the same project.

Setup checklist

Setup tasks	Description
Verify that the PPM Standard (com.snc.financial_planning_pmo) plugin is activated.	Navigate to **Subscription Management** > **Subscriptions** in your instance. The list displays the subscriptions that your organization has purchased.
Verify that the Slack spoke v2 (sn_slack_ah_v2) plugin is activated, for collaboration with Slack.	Navigate to **Subscription Management** > **Subscriptions** in your instance. The list displays the subscriptions that your organization has purchased.
Verify that the Microsoft Teams Graph spoke (sn_msteams_ahv2) plugin is activated, for collaboration with Microsoft Teams.	Navigate to **Subscription Management** > **Subscriptions** in your instance. The list displays the subscriptions that your organization has purchased.

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Setup tasks	Description
Verify that the Microsoft Azure AD spoke (com.sn.azure_ad.spoke) plugin is activated, for collaboration with Microsoft Teams.	Navigate to **Subscription Management** > **Subscriptions** in your instance. The list displays the subscriptions that your organization has purchased.

Note:
Activation of the PPM Standard, Microsoft Teams, and Slack spoke plugins on production instances may require separate licenses. Contact ServiceNow Customer Support for details.

- Ensure that the PPM Collaboration application and all of its associated store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

Role required: admin

Procedure

1. Navigate to the ServiceNow Store.
2. In the ServiceNow Store, search for PPM Collaboration.
3. Click the application tile.
   You can view detailed information about the application. Consider reading the Other Requirements and Dependencies sections, as applicable.
4. Click **Get** and enter your Now Support login credentials.
5. Click **Request Install**.
6. In the **Instance Name** field, enter your details and click **Validate Instance**.
7. In the **Reason for the Instance** field, enter your details and click **Request**.
   You receive an email with detailed installation instructions.
8. Log in to the instance on which you want to install the PPM Collaboration application.
9. Select **System Applications** > **All Available Applications** > **All**.
10. Locate the application using the filter criteria and search bar, select it, and click **Install**.

Result

The following components are installed with installation of the application:

- Roles
- Tables

For more information, see Components installed with PPM Collaboration.

What to do next

Setting up PPM collaboration for Slack.

Components installed with PPM Collaboration

Roles and tables are installed with activation of the PPM Collaboration application.

Note:
The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

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Roles installed

Role	Description
Collaboration user [SN_collab_common.collab_user]	Users with this role have read-only access to the Entity Channel table. This role is automatically assigned to project managers and task assignees.
Collaboration owner [SN_collab_common.collab_owner]	Users with this role have complete create, read, update, and delete access to the Entity Channel table. This role is automatically assigned to project managers.

Tables installed

Table	Description
Entity Channel [sn_collab_common_entity_channel]	Stores the list of IDs and names of the Slack channels that are created for the projects.

Setting up PPM collaboration for Microsoft Teams

Integrate your ServiceNow instance with your organization's Microsoft Teams to enable collaboration of your projects in Microsoft Teams.

PPM Collaboration uses the Microsoft Teams Graph and Microsoft Azure AD spoke actions such as creating a team for your project, adding or removing your project team members, archiving the team when the project is closed, posting a message when a record is updated, and so on. To enable these spoke actions, you must integrate your ServiceNow instance with Microsoft Teams Graph and Microsoft Azure AD to authenticate ServiceNow requests. For more information, see the Set up Microsoft Teams Graph spoke and Set up Microsoft Azure AD spoke topics.

Important:
When you activate the Microsoft Teams Graph and Microsoft Azure AD spokes, a Connection & Credential alias for Microsoft Teams Graph and Microsoft Azure AD is created by default with the IDs *sn_msteams_ahv2.Microsoft_Teams_Spoke* and *sn_azure_ad_spoke.AzureAD* respectively. The connection that is active (the Active field is set to *true*) in Connections related list of this alias uses this default ID to connect your ServiceNow instance to Microsoft Teams Graph and Microsoft Azure AD. Therefore, you can have multiple connections associated with this alias but ensure that only one connection is active at any given time.

Setting up PPM collaboration for Slack

Integrate your ServiceNow instance with your organization's Slack to enable collaboration of your projects in Slack.

PPM Collaboration uses the Slack spoke actions such as creating a channel for your project, adding or removing your project team members, archiving the channel when the project is closed, posting a message when a record is updated, and so on. To enable these spoke actions,

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you must integrate your ServiceNow instance with Slack to authenticate ServiceNow requests. For more information, see Set up Slack spoke.

Important:
When you activate Slack spoke, a Connection & Credential alias for Slack is created by default with the ID *sn_slack_ah_v2.Slack*. The connection that is active (the Active field is set to *true*) in Connections related list of this alias uses this default ID to connect your ServiceNow instance to Slack. Therefore, you can have multiple connections associated with this alias but ensure that only one connection is active at any given time.

Related topics

Slack spoke v2

Flows designed to synchronize projects with your collaboration tool

Understand the flows designed for the PPM Collaboration application so that you can edit the configurations as required.

PPM Collaboration flows

Slack Flow [Name]	Microsoft Teams Flow [Name]	Description
Action Slack [action_slack]	Action Teams [action_teams]	Posts a message to the project channel or team whenever an Action is created with priority **1-Critical** or **2-High** or if the priority of an existing Action is updated to **1-Critical** or **2-High**.
Add Assigned Users To Channel [add_assigned_users_to_channel]	Add Assigned Users To MS Group [add_assigned_users_to_ms_group]	Handles adding the users in the **Assigned to** or **Additional Assignee list** fields of the project tasks to the project channel or team.
Archive Project Channel [archive_project_channel]	Archive MS Group [archive_group]	Handles archival of the project channel or team based on the count of number of days from which the project is moved to a closed state. This flow is set to run daily at 08:00 AM.
Change Request Slack [cr_updated_slack]	Change Request Teams [change_request_teams]	Posts a message to the project channel or team whenever a Change request with priority **1-Critical** or **2-High** is created or if the priority of an existing Change request record is updated to **1-Critical** or **2-High**.
Daily Project Status Slack [daily_project_status]	Daily Project Status Teams [daily_project_status_teams]	Triggers a message about the overall status of the project to the project channel or team everyday at 08:00 AM.
Decision Slack [decision_updated_slack]	Decision Teams [decision_teams]	Posts a message to the project channel or team whenever a Decision with priority **1-Critical** or **2-High** is created or if the priority of an existing Decision is updated to **1-Critical** or **2-High**.
Issue Slack [issue_updated_slack]	Issue Teams [issue_teams]	Posts a message to the project channel or team whenever an Issue with priority **1-Critical** or **2-High** is created or if the priority of an existing Issue is updated to **1-Critical** or **2-High**.

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PPM Collaboration flows (continued)

Slack Flow [Name]	Microsoft Teams Flow [Name]	Description
Milestone/ KeyMilestone Slack [milestonekeymilestone]	Milestone/ KeyMilestone Teams [milestonekeymilestone_teams]	Posts a message to the project channel or team whenever a Milestone or a Key Milestone task is moved to the closed state.
Project Manager Changes Slack [project_manager_changes]	Project Manager Changes MS Teams [project_manager_changes_ms_teams]	Handles adding the new project manager as a member to the project channel or team. This flow also checks if the user who was the old project manager is assigned to any project tasks and if not assigned to any task, removes the user from the channel.
Project Status Slack [project_status_slack]	Project Status Teams [project_status_teams]	Posts a message to the project channel or team in the following three scenarios: • **State** field is updated to Closed Complete, Closed Incomplete, or Close Skipped states • **Status** fields is updated • Project manager changes for this project
Risk Flow Slack [risk_created_slack]	Risk Flow Teams [risk_created_teams]	Posts a message to the project channel or team whenever a Risk with probability **High** or **Absolute** is created or if the probability of an existing risk is updated to **High** or **Absolute**.

All the flows, except the subflows, are inactive by default. Enable the collaboration between PPM and Slack or Microsoft Teams for a specific action by activating these flows. You can view all these flows by navigating to **Flow Designer** > **Designer** and filtering the flows by the PPM collaboration application. For more information, see Activate a flow.

If you want to update the configuration for any of these flows, you can edit them. For example, if you want to update the time of daily status update from 8:00 AM to 9:00 AM, you can edit the Daily Project Status Slack [daily_project_status] or Daily Project Status Teams [daily_project_status_teams] flow. For more information, see Edit a flow.

Related topics

Flow Designer

Flows

Create a Microsoft team for your project

Create a Microsoft team for your project to start collaborating with your team and receive timely updates of the project.

Before you begin

Ensure that the project for which you want to create a team is active and not in a closed state.

Role required: it_project_manager

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Important:
You must be the designated project manager for this project in addition to having the it_project_manager role.

Procedure

1. Navigate to **Project** > **Projects** > **All**.
2. Open the project for which you want to create a team.

   Ensure that you are the project manager for the project you open.
3. Enable collaboration for the project by clicking the **Enable MS Teams Collaboration** related link.

Result

- A Microsoft team is created for the project. You can see the team's name in the success message on your project form. You can also view a link in the project form to access your MS team group, clicking on the link will navigate you to the MS team group for your project.
- You and the administrator are added as owners in the team.
- Any assignees and additional assignees of active project tasks for this project are added as members to this team.

  Assignees and additional assignees of project tasks that you create later will be automatically added as members to this team if you enable the Add Assigned Users To MS Group flow. However, new or existing stakeholders added to the project are not added as members to this channel.

  Note:
  Users assigned to the tasks (assignee and additional assignee) from Planning Console will not be added automatically to the Microsoft team.

- Once a team is successfully created for a project, the **Enable MS Teams Collaboration** related link is removed from that project. Collaboration cannot be enabled for both Slack and Microsoft Teams for the same project. If you have clicked on the **Enable MS Teams Collaboration** related link for a project, and you click the **Enable Slack Collaboration** related link before the MS team is created, a message will be displayed specifying that MS Teams creation is in progress.

If you are unable to create a team, retry the procedure after sometime. If the issue persists, contact your system administrator.

Create a Slack channel for your project

Create a Slack channel for your project to start collaborating with your team and receive timely updates of the project.

Before you begin

Ensure that the project for which you want to create a Slack channel is active and not in a closed state.

Role required: it_project_manager

Important:
You must be the designated project manager for this project in addition to having the it_project_manager role.

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Procedure

1. Navigate to **Project** > **Projects** > **All**.
2. Open the project for which you want to create a Slack channel.

   Ensure that you are the project manager for the project you open.
3. Enable collaboration for the project by clicking the **Enable Slack Collaboration** related link.

Result

- A channel in Slack is created for this project. You can see the channel's name in the success message on your project form. You can also view a link in the project form to access your Slack channel, clicking on the link will navigate you to the Slack channel for your project.
- You and any existing assignees and additional assignees of active project tasks for this project are added as members to this channel.

  Assignees and additional assignees of project tasks that you create later will be automatically added as members to this channel if you enable the Add Assigned Users To Channel flow. However, new or existing stakeholders added to the project are not added as members to this channel.

  Note:
  Users assigned to the tasks (assignee and additional assignee) from Planning Console will not be added automatically to the Slack channel.

- Once a channel is successfully created for a project, the **Enable Slack Collaboration** related link is removed from that project. Collaboration cannot be enabled for both Slack and Microsoft Teams for the same project. If you have clicked on the **Enable Slack Collaboration** related link for a project, and you click the **Enable MS Teams Collaboration** related link before the Slack channel is created, a message will be displayed specifying that Slack channel creation is in progress.

If you are unable to create a channel, retry the procedure after sometime. If the issue persists, contact your system administrator.

Notifications for project updates in your collaboration tool

Receive updates related to your project on your Slack channel or Microsoft team. Analyze the delayed and overdue tasks, follow closure of milestones, and monitor changes to risk, issue, decision, action, and change request (RIDAC) items of your project.

Using the automatic project status updates on the project collaboration channel or team, project managers can take informed decisions about project planning, resource management, finance allocation. The team members can understand updates made to the project and actively collaborate on any delayed or overdue tasks.

Note:
Project managers can reach out to their system administrators to configure the application settings for these notifications according to their preferences.

Daily notification on project status

A notification with the consolidated project status is sent to the project's channel daily at 8:00 AM which consists of the following information.

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Notification	Information
Project overview	• A direct URL of the project. Clicking this URL opens the project in your ServiceNow instance. • Name of the project. • Planned start and end dates of the project. • State of the project, for example, Work in Progress. • Status of the project, for example, Green. • Percentage of project completion. • Any exceptions like estimation at completion is greater than total planned cost, planned end date is later than the approved end date, project not started on the start date, and project running late.
Project tasks due today	List of project tasks that have planned end date marked as today and are in the Work in Progress state. The list displays only five project tasks that are sorted alphabetically by their short description.
Overdue Tasks (Tasks not started on planned start date)	List of project tasks which have a planned start date before today but are not in either the Work in Progress or Closed states. The list displays only five project tasks that are sorted in an ascending order of the planned start dates so that you get high visibility into the tasks that are overdue for a longer period.
Delayed Tasks (Tasks not completed on planned end date)	List of project tasks which have a planned end date before today and are in the Work in Progress state. The list displays only five project tasks that are sorted in ascending order of the planned end dates so that you get high visibility into the tasks that have been delayed for a longer period.
Project tasks due within seven days	List of five of the following project tasks that have a planned end date within seven days from today. All these tasks are displayed in ascending order of their due dates so that you get high visibility into the tasks that are due soon. **Note:** Tasks that in Closed state are not displayed in the list. • High priority risks, issues, and action items • Milestone or key milestone tasks

Notification regarding change of project manager

When there is a change in the manager of your project, an update is made to the Project manager field of the project record.

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- A notification including the project URL is sent to your project channel on this update.
- New project manager is added as a member of the channel.
- If no project tasks are assigned to the old project manager, this user is removed as a member of the channel.

Notification for other updates to the project

Notification	Information
Project's status	When an update is made to the Status or State fields of the project, a notification including the project URL is sent to your project channel.

RIDAC records	You receive notifications in your project channel when a new RIDAC record is added to or an existing RIDAC record is updated in the project for the following scenarios. With every notification, you receive a direct URL to the corresponding record.
	• Risk
	  ○ New risk is created with the Probability field set to **High** or **Absolute**
	  ○ The Probability field for an existing risk is updated to **High** or **Absolute**
	• Issue, Decision, Action, and Change request
	  ○ New record is created with the priority field set to **1-Critical** or **2-High**
	  ○ Priority of an existing record is updated to **1-Critical** or **2-High**

Key milestone/ milestone	Whenever a key milestone or milestone task is Closed Complete, Closed Incomplete, and Closed Skipped, you are notified about the closure and the user who closed it, with a direct URL to the milestone task.

Archiving your project collaboration channel or team

Understand how your project Slack channel or Microsoft team is archived when your project is moved to a closed state.

Moving the project to a closed state

When the project manager moves the project to Closed Complete, Closed Incomplete, or Closed skipped state, the following actions are triggered:

- A notification about project closure is sent to the channel or team immediately.
- The channel or team is archived within 15 days from the day the project is moved to a closed state.

  This duration of 15 days helps the project members to bring any pending communication to closure or share any pending project documentation.

  Project managers can contact their administrator to update this duration of 15 days to a value of their choice.

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Deletion of a project task

When a project task is deleted, the members in the corresponding Slack channel or Microsoft team are not removed automatically. To remove the members on deletion of a project task, you must enable the **Remove Users From Slack/Teams Channel** business rule. This business rule is created on the Project Task table and is not enabled by default. For more information, see Business rules.

Deletion of the project channel or team

If the channel is deleted in the Slack application, or the team is deleted in the Microsoft Teams application, the PPM Collaboration application does not handle the deletion of the project's reference in the Entity Channel [sn_collab_common_entity_channel] table automatically. So, the project manager cannot see the **Enable Slack Collaboration** or **Enable MS Teams Collaboration** related link on the project form again.

If the project manager wants to create a channel or team again for this project, administrator must manually delete the project's reference from the Entity Channel table. Then, the related link to enable collaboration appears on the project form.

Virtual Agent for PPM

ServiceNow® Virtual Agent for PPM enables project managers to get quick answers to business-related queries by interacting with a virtual agent through various messaging services.

Virtual Agent for PPM helps project managers view business-related information quickly in a single step rather than having to navigate through various lists. For example, you can get the list of all your project tasks that are overdue.

The base system provides the following predefined Virtual Agent topics (chatbot conversations):

- Project and Task status
  - All active projects
  - Projects with status red
  - Projects ending next week and % complete less than 60%
  - Overdue milestones/ key milestones
  - Overdue tasks
  - Delayed tasks
- Resources
  - Resource plans with actual hours greater than allocated hours
  - Unallocated resource plans starting next week
  - Unallocated resource plans with requested extension
- Financials
  - My active projects
  - Projects with EAC greater than planned cost
  - Projects with EAC greater than budget
- RIDAC (Risk, Issue, Decision, Action, and Request Changes)
  - Absolute and high probability risks due this week
  - Critical and high priority issues due this week
  - Critical and high priority action items due this week

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- Data quality
  - Projects without business case
  - Projects without strategy
  - Projects without program or portfolio

A topic defines the dialog between the Virtual Agent (chat support bot) and user, which enables you to gather information for a specific business need. For more information, see Virtual Agent.

Integration with messaging applications

You can run Virtual Agent bot conversations for PPM using third-party messaging applications like Slack or Microsoft Teams.

Use the Virtual Agent integration app to configure the messaging apps for your instance.

For more information, see Virtual Agent integration with messaging apps.

For more information on integrating with Slack or Microsoft Teams, see Setting up Virtual Agent notifications.

Install Virtual Agent for PPM

Install Virtual Agent for PPM from the ServiceNow store.

Before you begin
Role required: admin

About this task
To install Virtual Agent for PPM, activate the following plugins:

Name	Description
PPM Standard (com.snc.financial_planning_pmo)	Activates the PPM Standard basic plugin for the PPM (Project Portfolio Management) applications.
Glide Virtual Agent (com.glide.cs.chatbot)	Activates the Virtual Agent framework and other necessary plugins.
Virtual Agent for PPM (com.sn_ppm_va)	Activates a conversational bot platform for providing user assistance through conversations within a messaging interface for PPM.

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the application using the filter criteria and search bar.
   You can search for the application by its name or ID. If you cannot find an application, you may have to request it from ServiceNow store.

   Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. Click **Install**.

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4. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed. If there are any plugins or applications that need to be installed, you must install them before you can install Virtual Agent for PPM.

5. **Optional:** If demo data is available and you want to install it, click **Load demo data**.

   (Optional) Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

   > **Important:**
   > If you don't load the demo data during installation, it's unavailable to load later.

6. Click **Install**.

Enable Virtual Agent for PPM

Enable Virtual Agent for PPM to start chatting with the Virtual Agent.

Before you begin

Role required: admin, virtual_agent_admin
The base system provides predefined Virtual Agent topics (chatbot conversations). To customize a topic, duplicate it and then edit it. See Virtual Agent Designer

Procedure

1. Navigate to **All** > **Collaboration > Virtual Agent > Designer > Topics**.
2. Click the **PPM Virtual Agent** card to open it.
   - To use the provided topic with no changes, click **Publish**.
   - To duplicate the topic so you can customize it, click **Duplicate**. Enter a name for the duplicate topic and click **Save**.

PPM Virtual Agent conversation flows

Virtual Agent for PPM provides several predefined topic conversations to enable project managers to gather information on their business-related tasks.

The following predefined topic conversations are available to view if you have the it_project_manager role.

Project and task status

Project and task-related information like active projects, projects that are in the red state, projects due to end in the near future, and projects with overdue tasks and milestones. This information helps you track and plan projects per set milestones.

Resources

Resource-related information such as resource plans containing actual hours greater than allocated hours, or unallocated resource plans that are due to start in the coming week or have an extension requested. You can then manage resources and act on resource plans that are not progressing as planned.

Financials

Finance-related information such as projects where the estimate at completion amount is greater than the planned cost or projects where the estimate at

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completion amount is greater than the budget amount. This information helps you understand the financial performance of your projects.

RIDAC

RIDAC (Risks, Issues, Decisions, Actions, and Request Changes) related information like projects with absolute or high probability risks due in the coming week, or projects with critical or high probability issues and actions due in the current week. This information helps you analyze and identify patterns, trends, and probable resolution for planning future projects.

Data quality

Quality-related information like projects that do not have a business case, strategy, program, or portfolio assigned to them. This information helps you evaluate projects that are not aligned to any strategy, business case, program, or portfolio.

Reusable PPM Virtual Agent topic blocks

You can create and reuse topics blocks to simplify the topic authoring and maintenance process. Topic blocks enable you to reuse standard procedures across conversation topics.

The following predefined reusable topic blocks are available:

- Project Topic for PPM VA
- Specific Project Options
- Project Data Quality Topic for PPM VA
- Project Financials Topic for PPM VA
- Resource Topic for PPM VA
- RIDAC Topic for PPM VA

To view just the reusable topic functions, access the Topics page in Virtual Agent Designer and click the **Topic Blocks** tab. For detailed information, see Reusable topic blocks.

Planning attributes

Planning attributes are designed to define and work on attribute-based resource mapping in Resource Management and to generate labor costs for these resources in financials.

An attribute is a property or a characteristic defined as a resource or a task type, which is considered for attribute-based planning. These attributes can be used for resource management and financial planning.

After the planning attributes are identified, as an admin, you can create or edit planning attributes based on project requirements and metadata available from the resource table. Working on creating planning attributes involves identifying and defining the attributes to use for a project planning process.

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Role-based advantages of using planning attributes

Role	Advantages
Resource Manager (Resource Management)	• Add any resources to a planning level. • Use the resource grid to plan any attribute or make the required detailed changes. • Allocate a heatmap to view and manage weekly or monthly allocation conflicts.
Project Manager (Project Financials)	• Attribute-based creation of labor costs based on the new Resource Management. • Automatically generate labor costs for the external resources. • View the labor costs by the expense type based on the tasks assigned to your resources. • View the financial forecasts for split up labor costs.

The following attributes are enabled by default for attribute-based resource mapping and to generate labor costs using financials.

Planning attributes

Attribute name	Resource Management	Financials
Employee Type	✓	✓
Expense Type	✗	✓
Group	✓	✗
Role	✓	✓
Skill	✓	✗

Create or edit planning attributes

Create or edit planning attributes to plan and forecast your resources and financials for a project.

Before you begin

Role required: pps_admin, sn_align_core.apw_admin

Procedure

1. Navigate to **All** > **Project Administration** > **Planning attributes**.
2. Use the following options to create or edit a planning attribute.

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3. Enter field names for the lookup table values in **Planning attribute column configurations** table.
4. **Optional:** To add new configurations to the default column configuration list for any tables containing the financials or resource management attributes:

   a. Select **New**.

   b. Select a lookup table from the list.

   c. Select a field name from the list and select **Submit**.
   For example: If you want to create an attribute for the Location field, add the location-related columns to the selected lookup table.
   The selected item is added to the column configuration list with an auto-generated field description.

5. Select **Update**.

> **Important:**
> If you're creating an attribute for resource management, make sure that you add the Attribute field to the *resource_allocation*, *resource_plan*, and *sn_plng_att_core_resource_assignment* lookup tables. Similarly, if you're creating an attribute for financials, add the Attribute field to the *cost_plan* lookup table along with the resource management lookup tables.

Planning attribute form

Use the Planning attribute form fields to modify a planning attribute.

Planning attribute form

Field	Description
Attribute type	Attribute type list. • Resource: To use the attribute for resources or financials for your project. • Task: To use the attribute to generate labor costs only.
Attribute name	Name of the attribute.
Enable for resource management	Option to enable the attribute for resource planning. This option is selected by default.
Enable for financials	Option to enable/disable the attribute for financial planning.

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Planning attribute form (continued)

Field	Description
	Note: • To enable an attribute for financials, it should be enabled for resource management. • To disable an attribute for financials for an ongoing project: Delete all the existing labor cost plans, disable the attribute for financials, and regenerate labor cost plans.
Attribute table	The default attribute table is the Employee Profile from which the attribute sources the information.
Attribute field	Element name from the Employee Profile table to define the attribute. Relevant lookup tables for the selected field value are displayed in the Planning attribute column configurations table after saving the form. Enter the respective field names of the columns to activate the attribute.
Active	Option to activate and use the attribute for planning.
Task attribute table and field	Table name and field value for a task attribute. This field is visible only while creating a Task type attribute.

Predictive Intelligence for Project Management

The Predictive Intelligence for Project Management capability uses machine-learning algorithms to search and display similar projects while defining a new project using the project form. You can also search for existing projects and compare similar projects for project planning.

The PPM Predictive Intelligence Workbench includes a prebuilt use case template that systematically guides you through the process of creating and training new predictive models, evaluating and testing them, and finally adding them to your business process to add value to your Idea, Demand, and Project Management.

Once you train your custom use cases, they are usable immediately. No prior knowledge or experience with artificial intelligence or machine learning is required when you use the PPM Predictive Intelligence Workbench.

The application includes templates with prebuilt guidance to assist you in creating, training, evaluating, testing, and producing your unique predictive models.

Predictive Intelligence for Project Management has the following benefits:

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- Improves the quality of your database by avoiding duplicate projects.
- Helps you in planning your project. You can view planning details of similar projects that were created and executed in the past.

Activation information

Activate the following plugins before using the Predictive Intelligence Workbench:

- Predictive Intelligence for PPM (com.snc.ppm_ml) plugin
- Predictive Intelligence for Ideation (com.snc.innovation_management_ml) plugin

Solution definitions for Predictive Intelligence for Project Management

The solution definition for Predictive Intelligence for Project Management capability is available in the Predictive Intelligence for PPM plugin (com.snc.ppm_ml). For more information about Predictive Intelligence, see Predictive Intelligence and Contextual search.

Solution Definition for Project Management

Solution Definition	Solution Type	Description
Similar Projects **Note:** This solution definition is available as a template on instances where the following plugins are active: • Predictive Intelligence for Contextual Search plugin (com.snc.contextual_search_ml) • PPM Standard plugin (com.snc.financial_planning_pmo) • Predictive Intelligence for PPM plugin (com.snc.ppm_ml)	Similarity	View similar projects based on the **Project Name** and **Description** fields. You can see the results in the **Similar projects** section on the Project form.

Related topics

Predictive Intelligence

Train the similarity solution for Project Management to find similar projects

Define a project

PPM PIWB template - Find similar projects

Use a guided template that walks you through training the Similar Projects solution definition for finding similar projects.

Before you begin
Role required: piwb_manager

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Procedure

1. Navigate to **All** > **Predictive Intelligence Workbench** > **Use Cases** > **Create New from Template**.
2. Select the **Similar Projects** template.
3. Click **Start**.
   The use case set up window opens displaying the name and description of the use case.
4. Click **Take me there**.
   The **ServiceNow Machine Learning Solutions** page opens and displays all the available solutions.
5. Expand the **Similarity** solution to see the available solution definitions.
   Configure or train the **Similarity** solution for finding similar projects.
   - To configure the Similar Projects solution definition (ml_sn_global_global_similar_projects), click **Configure**. For more information, see Train the similarity solution for Project Management to find similar projects.
   - To train the Similar Projects solution definition (ml_sn_global_global_similar_projects), click **Train**.

Train the similarity solution for Project Management to find similar projects

Train the Similar Projects solution definition included within the Predictive Intelligence for PPM capability to find related projects when defining a project.

Before you begin

Ensure that the Predictive Intelligence for Contextual Search plugin (com.snc.contextual_search_ml), PPM Standard plugin (com.snc.financial_planning_pmo), and Predictive Intelligence for PPM plugin (com.snc.ppm_ml) are activated. For more information about Predictive Intelligence, see Predictive Intelligence.

Role required: admin

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Similarity** > **Solution Definitions**.
2. In the Similarity Definitions list, search for and select the Similar Projects solution definition (ml_sn_global_global_similar_projects).
3. On the Similarity Definition form, verify the default field values for projects.
   For more information about the Similarity Definition form fields, see Create and train a similarity solution.
4. Click **Update & Retrain**.
5. Open the Similarity Definition form for the Similar Projects solution definition (ml_sn_global_global_similar_projects).
6. In the ML Solutions related list, view the training solution progress in the **Progress** column.

> **Note:**
> Alternatively, you can click the link for the solution in the **Active** column. On the ML Solution form, click the **Show training progress** related link to check the training solution progress.

Result

When the solution is complete, the similar projects appear in the Similar projects section on the Project form.

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What to do next

- Review similarity examples: On the Similarity Definition form, in the ML Solutions related list, when **Progress** is 100%, in the **Active** column, click the link for the solution. On the ML Solution form, click the **Similarity Examples** related link to view the Similarity Examples list.
- Update the similarity score threshold: On the ML Solution form, on the **Solution Statistics** tab, enter the required value in the **Similarity Score Threshold** field. Right-click the ML Solution form and click **Save**.
- Test the prediction output for the records: On the ML Solution form, on the **Test solution** tab, enter your text in the **Short description** field and the maximum number of expected results in the **Top N** field, and then click **Run test**. The results above the similarity score threshold value are displayed.

Related topics

Predictive Intelligence

Predictive Intelligence for Project Management

Define a project

Project Workspace

ServiceNow® Project Workspace helps project managers to plan and manage projects from a central location.

The new Project Workspace comes with a Planning, Details, Financials, RIDAC, Analytics, and Doc page. See the following video for an overview of the app. A detailed explanation of the features follows the video.

Quick overview of the new Project Workspace UI.

Project Workspace Overview

The Project Workspace enables you to collaborate, plan, organize, and execute tasks in a single workspace. This application provides the ability to create and monitor projects, tasks, sub projects, dependencies, and timelines. Project managers can allocate and optimize resources within the Project Workspace and make sure that the right individuals are assigned to the right tasks. With Project Workspace, you can plan and track your project finances, budgets, and cost plans. This project management application helps in making informed and timely decisions by providing relevant project information in one place.

Create status report for your projects and run analytics for your projects. Experience the Gen AI feature in Project Workspace. Summarize, elaborate, or shorten the selected content on Docs to quickly understand the key information in documents using Project Gen AI Docs skill.

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Get started

Explore  Learn the features and business value of Project Workspace	Configure  Set up the core configuration
Use  Manage projects with Project Workspace	Reference  Learn about forms and fields of Project Workspace

Troubleshoot and get help

- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Project Workspace

The ServiceNow® Project Workspace application helps you to manage projects, resources, and financials in a single workspace.

Project Workspace overview

Project Workspace is a project management application that optimizes different workflows and enables planning and managing of projects or tasks, resources, and financials in one place. This application centralizes access to Projects, subprojects, project tasks, resources, and financials, reducing the need to navigate through various applications.

The Project Workspace provides Project Managers with a comprehensive overview of the all projects and project-related information. This project management application enables better project planning by providing ways to define project scope, dependencies, and time lines.

Project Workspace benefits

Benefit	Feature
Initiate a project and start planning your project tasks.	Create a project and initiate project planning

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Benefit	Feature
Add project tasks to your project and assign tasks directly to your team for successful project implementation.	Create project tasks and add them to your project
Add project task dependencies to establish a structured workflow within the project.	Create internal dependencies for your project
Add a dependency between tasks of different projects to align timelines between interrelated projects.	Connect tasks in different projects through external dependencies
Create and compare baselines for your project to capture the project's progress over time.	Set up a baseline for your project
Create a status report to monitor project health, metrics, risks, issues, and milestones.	Create a status report in Project Workspace
Tag stakeholders for their feedback or notes and add comments to collaborate on your project.	Collaborate with Stakeholders for your project
Generate a summary of selected text in Docs using Now Assist.	Generate the summary for selected or complete content with Project doc summarization skill in Project Workspace
Generate and schedule project summary emails for your projects.	Schedule the project summary emails with Email project summary skill
Add Risk, Issue, Decision, Action, or Change request to your project to track and manage the RIDAC records throughout project development.	Add a RIDAC record to your project
Export your project as a PowerPoint file directly from the workspace without copying the project information in to slides.	Export a project to Microsoft PowerPoint
Generate and customize status reports to provide an up-to-date overview of a project's progress, including key metrics such as health, schedule, and resource usage, using either a new report or an existing template.	Create a status report in Project Workspace
Create and track resource assignments at project or task level to optimize resource allocation throughout the project.	Create resource assignments and initiate resources planning
Create a cost plan for the required duration to monitor your projected and actual expenses.	Create a cost plan for your project
Add an expense line into project cost plans to establish a comprehensive and detailed financial framework for your project.	Add an expense line for a cost plan
Generate labor costs for attribute-based resource assignments to track expenses for your project.	Generate labor costs for your project
Collaborate with team members, save notes, generate project charters, and create project briefs using Docs.	Collaborate on projects using Docs

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Related topics

- Managing projects with Project Workspace
- Managing financials for your projects
- Resource planning with Project Workspace
- Status reporting in Project Workspace
- Project workspace classic - Legacy

Project planning in Project Workspace

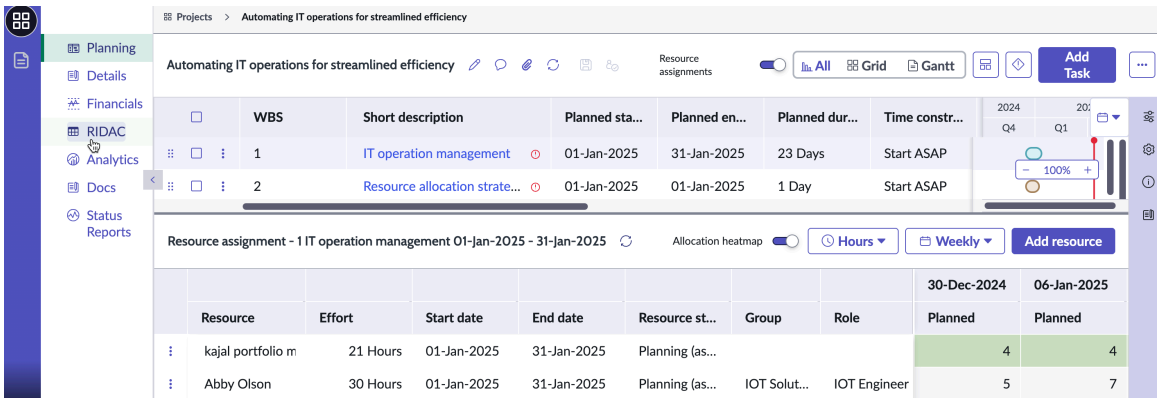
Plan your projects with an intuitive Project Workspace application to achieve successful project outcomes.

The Project Workspace application enables Project Managers to define, plan, and prioritize projects, subprojects, project tasks within a single workspace.

The Project Workspace structures the project planning phase from defining the project dates and milestones to allocating resources, scheduling tasks, and establishing dependencies.

The new Project Workspace is structured into these pages: Planning, Details, Financials, RIDAC, Analytics, Docs, and Status reports. The Planning page helps in creating and planning projects, project tasks, and resources. The Details page provides a comprehensive overview of the project. The Financials page helps in managing the financial aspects of the project. The RIDAC page helps in identifying, tracking, and managing risks, issues, decisions, actions, or changes throughout the project life cycle.

Key benefits



Use the planning page to organize project tasks, allocate resources, and set project timelines. As a project manager, you can:

- Initiate new projects, define project details, objectives, and initial plans to provide a clear direction to the project team.
- Establish the project's structure within the workspace, including creating projects, subprojects, tasks, milestones, and dependencies.
- Define the planned start date and end date for your projects.
- Allocate resources and analyze resource availability and utilization for projects.
- Monitor the progress of projects, subprojects, tasks, and milestones. Track the project's overall advancement.
- Organize and manage project documentation and make sure that all relevant files, reports, and data are easily accessible.
- Engage in financial planning, tracking budget allocations, expenses, and financial metrics.

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Project task checklist items

Track the activities that must be completed on a task using the project task checklist items.

For a project task to be considered complete, you can track activities that do not require separate sub tasks. For example, you have a human resources-related project that includes a task for interviewing candidates. You can also track booking a meeting room or getting an interview confirmation from the candidate. Create a checklist item for each and mark when they have been completed.

Checklist items do not have start or end dates, nor do they track effort or cost. By default, a checklist item record provides only a name with a check box, which can be selected or unselected. The state of the project task is independent of the state of the checklist items.

Checklists, as well as tasks, are copied into a project template. You also have access to all checklist templates from any project task form.

Related topics

Create checklist items for a project task

Resource planning in Project Workspace

Plan and allocate resources using the Project Workspace application to enable optimal resource utilization and execution.

The Resource Management application enables Project Managers to create resource assignments, allocate resources, and analyze resource availability in Project Workspace. The Resource Management application can be used along with Project Workspace for any project or project tasks.

Key benefits

The Resource Management application provides visibility into resource assignments and allocations in Project Workspace at any phase of the project.

With Resource Management in Project Workspace, you can:

- Assign resources at any stage of project development. Resources can be planned at a granular level.
- Change resource assignment dates, resources, and efforts for resource availability at any phase of the project.
- Create an attribute-based resource assignment in Project Workspace.
- View availability in the heatmap and make allocations based on the resource availability. The allocations are color-coded to display the availability of the resources for a task.
- Request and allocate resources and verify resource availability on a single location in the Project Workspace.

Resource Management workflow in Project Workspace

The Project Manager can create an attribute-based resource assignment in Project Workspace. Any type of project task can be added to the resource assignment.

After a resource assignment is created, the project manager verifies resource availability, and then assigns the resource to a resource assignment. If the resource isn't available, then the Project Manager coordinates with the Resource Manager for resource availability. If all parties agree, the resources begin work. Project Managers can view the resource allocation in the heatmap.

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Note:
After the resource assignment is created and has any requested allocations, a resource plan is created automatically in the allocated state in the back-end. Either a new resource plan and resource allocation are created, or an existing resource plan is retrieved based on the attributes. As a result, its planned cost and allocated cost are matched, and its planned and allocated hours are also matched. These resource plans aren't displayed in the Resource Allocation Workbench.

Financials in Project Workspace

Plan, re-forecast, track the financials, and create baselines for projects and demands.

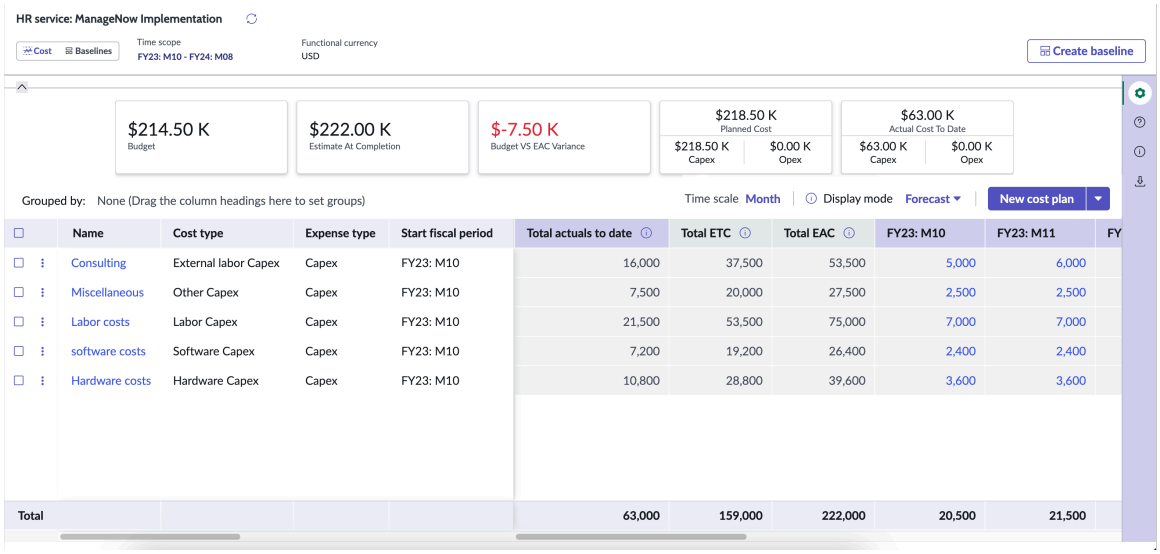
The financials view provides a streamlined perspective, showcasing the actual and planned expenses for the entire fiscal period. You can view the latest estimated cost of completion by displaying the Actual costs for the past fiscal periods, planned costs for the current and future fiscal periods, the totals for quarter, year, and total duration of work.

The interface gives you the ability to create cost plans, expense lines, and baselines. As a project manager or a financial user, you can:

- Enter high-level financial forecasts for planning items using the simple financials section in the Details tab.
- Work on high-level estimating for Planned opEx and Planned capEx.
- Create a detailed breakdown of the planned costs using the financials.
- Add, edit, or delete cost plans from the side panel.
- Re-forecast your planned expenses using the in-line editing feature.
- View a streamlined perspective, showcasing your actual costs for the past and planned expenses for the future, for the entire time scope of the planning item.
- Get a better comprehensive solution by viewing the Forecast (previously EAC - Estimate at Completion), Remaining Estimates (previously ETC - Estimate to Completion), and Actuals of each cost plan for the total time scope and the yearly breakdowns.
- Re-forecast the planned cost for future fiscal periods by directly updating the quarterly and yearly totals using the in-line editing capability of the grid.
- Generate labor costs depending on the resource assignments for the entire scope of the planning item broken down by the financial attributes configured for your organization. For more information on the planning attributes for attribute-based mapping, see Planning attributes.
- Add or edit expense lines against the cost plans from the side panel with the associated cost plan details pre-populated.
- Record unplanned expenses using the New expense line side panel.
- Create and compare financial baseline to track the financials of your projects while you execute them.
- Compare the latest costs (actual expenses for past fiscal periods and planned costs for current and future fiscal periods) with the initial forecasted planned costs by creating financial baseline and using the compare baselines capability.
- Analyze the cause of variance in costs and when did this occur over time by capturing the financial baselines manually or automatically.

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Financials screen



You can view the following information on the financials screen.

- Time scope: duration of the planning item or a cost plan, whichever has a larger fiscal period range.
- Functional currency: currency defined and used to calculate the financials.
- Customizable widgets showing different financial information such as allocated budget, Forecast (previously EAC - Estimate at Completion), Variance (the difference between budget and Forecast), breakdown of planned costs, and actuals by cost type.

  Note:
  Budget and Budget vs EAC Variance widgets are available for Demands and Projects only.

- Time scale: time period breakdowns to view the financials. Default value is set to Month/ Period, depending on the fiscal calendar type.
- Generate labor costs: one-click solution to generate or refresh the planned labor costs for the planning item depending on resource assignments.

  Note:
  This option is enabled for the projects with resource assignments only.

- The pane gives you a tabulated view of the cost plan attributes displaying the Name, Cost type, Expense type, Stat fiscal period, End fiscal period, Total planned cost, Employee type, and Role. You can customize these fields. For more information, see Customize the left pane view for financials.
- In the right pane, you can view the total Actuals, Forecast, and Remaining Estimates for the selected Time scope duration. Actual expenses against a cost plan for the past fiscal periods, Actuals, Forecast, and Remaining Estimates for the current fiscal year, and planned costs for the current and future fiscal periods.

  Note:
  The header rows of actuals and planned are color-coded differently to help you easily identify and differentiate between the expense types.

- New cost plan: opens a simplified side-panel to create a new cost plan for the entity.

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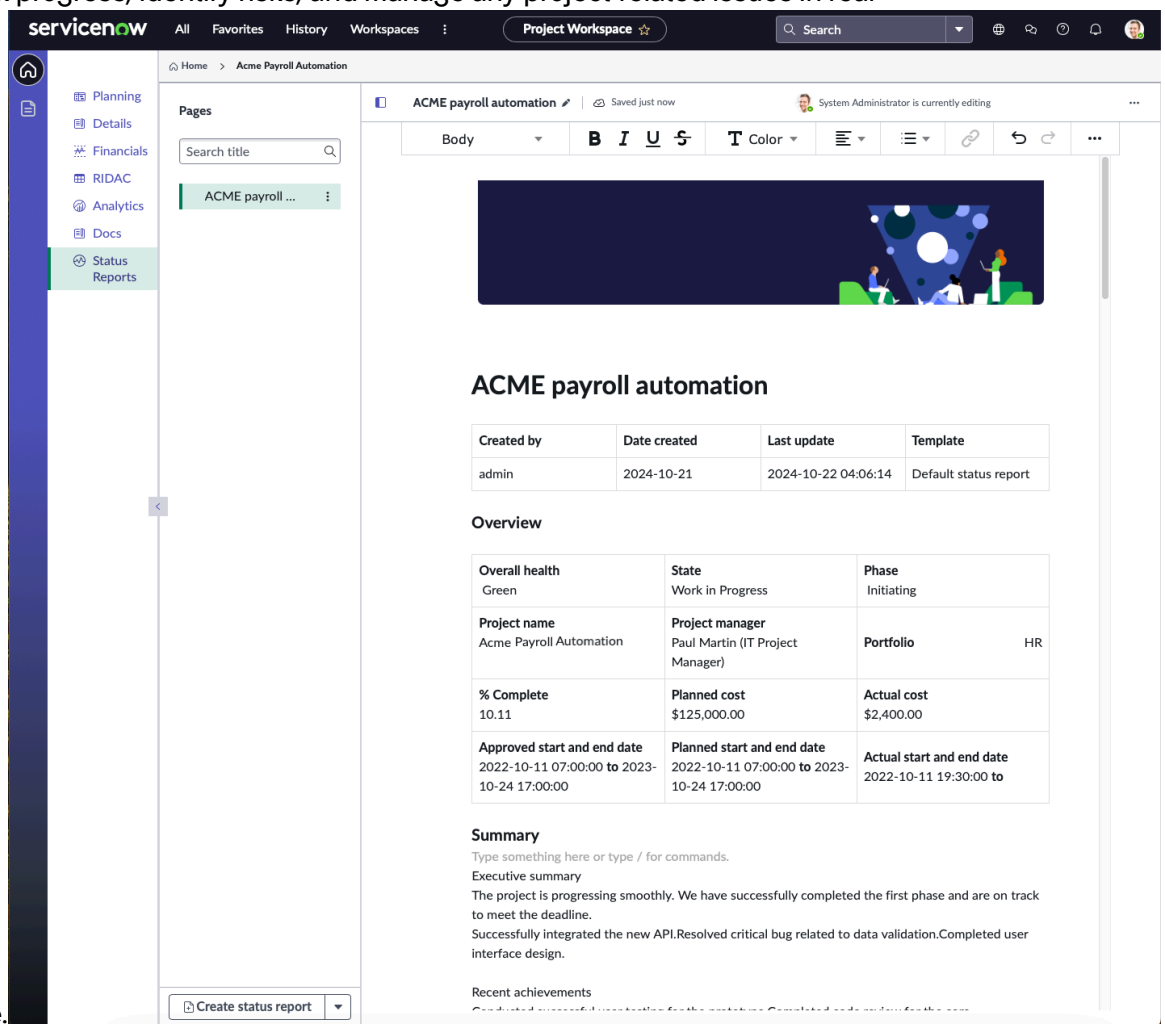
- Personalize option to customize the columns in the left pane of the table.
- Export option to download Cost or Baselines comparison as Microsoft Excel or CSV file.

Status reporting in Project Workspace

A status report in Project Workspace is a snapshot in time that gives an overview of your overall project health across key areas such as cost, resources, milestones, health, and more.

https://player.vimeo.com/video/1093765468?h=414833d0a6&badge=0&autopause=0&player_id=0&app_id=58479

The Status reports in Project Workspace provide a comprehensive, configurable, and customizable view of the current state of a project by capturing and displaying key project metrics such as overall health, schedule, scope, cost, and resource utilization. Status reports help project teams and stakeholders track progress, identify risks, and manage any project-related issues in real-time.



A status report includes:

Status report main metrics

Metric	Description
Overall health	The general condition of the project (green, yellow, or red).

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Status report main metrics (continued)

Metric	Description
Completion status	The percentage of project completion.
Schedule and scope	Key milestones and any changes in scope.
Cost metrics	Planned and actual costs, and budget variance.
Resource utilization	Allocation and effort tracking for project resources.

Key benefits

The status report feature in Project Workspace provides a clear view of the project's overall health, progress, and key metrics, confirming effective communication and tracking throughout the project life-cycle.

With status reports in Project Workspace, you can:

- Gain improved project visibility by having a concise summary of key metrics such as schedule, cost, and resource utilization, enabling stakeholders to track the progress.
- Facilitate better decision-making by providing a snapshot of the project's current state, helping project managers and stakeholders address potential challenges.
- Enhance risk management by highlighting any risks, issues, or variances, enabling teams to respond proactively to project concerns.
- Maintain consistent communication across teams and stakeholders by delivering regular, standardized updates, confirming everyone stays informed about the project's progress and health.
- Increase efficiency through the use of templates that streamline the creation of reports, saving time and confirming consistency across projects while enabling for customization as needed.

Status report templates

Status report templates simplify the process of generating project updates by providing pre-defined structures, confirming consistency and saving time. Two default templates are available:

- One Page Status Report: This template provides a concise one-page summary of key project metrics, making it ideal for quick updates where a high-level overview is sufficient.
- Default Status Report: This template includes a more comprehensive range of data points, covering areas such as milestones, risks, issues, decisions, and change requests. It offers a detailed view of the project's progress and status, similar to a classic status report.

- You can create a status report using one of the existing templates: Create a status report in Project Workspace
- You can also create your own status report template from scratch: Create a status report template in Project Workspace

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Related topics

- Analyze the status report in Project Workspace
- Import old project status report to Project Workspace
- Add dynamic content to status report in Project Workspace

Configuring Project Workspace

Set up and configure the Project Workspace application to initiate and plan your projects, financials, and resources.

Related topics

- Managing projects with Project Workspace
- Managing financials for your projects
- Resource planning with Project Workspace
- Project Workspace reference

Configuring projects with Project Workspace

Set up the Project Workspace application and start planning on your project.

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Project Workspace application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- Install Project Workspace.

Install Project Workspace

You can install the Project Workspace application (sn_pw) if you have the admin role.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Project Workspace application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- Starting with Xanadu release, installing the PPM Standard plugin also installs the Project Workspace application.
- Ensure you have activated the PPM Standard plugin (com.snc.financial_planning_pmo).

Role required: admin

About this task

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Project Workspace application (sn_pw) using the filter criteria and search bar.

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You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

In the list next to the **Install** button, the versions that are available to you are displayed.

3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Result

Planning attributes dependency plug-in is installed along with Project Workspace.

Configuring resources with Project Workspace

Configure various aspects of Resource Management based on your requirements in Project Workspace to allocate resources for your project.

- Review the Project Workspace application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- Install Project Workspace.
- Ensure you've activated the PPM Standard plugin (com.snc.financial_planning_pmo).
- Ensure you have enabled attributes for Resource Management. For more information, see Planning attributes.

Configure financials for Project Workspace

Customize financials view, planning attributes, and activate scheduled jobs to work on the financial planning for your projects.

Before you begin

Role required: admin

Procedure

1. Configure the attributes to generate labor costs in financials based on the resource assignments on the work items.
   For more information, see Planning attributes and Create or edit planning attributes.
2. Generate default mapping configurations to create table maps.
   For more information, see Generate default mapping configurations.
3. Enable the budget allocation for projects.
   For more information, see Enable financial budget allocation for projects in Project Workspace.
4. Define the budget allocation attribute to allocate budget by cost type or expense type.
   For more information, see Configure budget attribute at instance-level to allocate budget.

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5. Enable the expense type attribute for resource assignments to capture relevant expenses for the work.
   For more information, see Enable expense type on resource assignments.
6. Create new widgets to view the rolled up financial data at planning item level.
   For more information, see Configure a widget and associate it with project.
7. **Optional:** Customize the left pane in the financials screen to match the requirements of your organization.
   For more information, see Customize the left pane view for financials.
8. Customize the Create cost plan form fields to match the requirements of your organization.
   For more information, see Customise cost plan form.
9. Customize the default expense types to manage cost plans for your projects and demands.
   For more information, see Change the default expense type for projects.
10. Activate and define scheduled job to create financial baselines for your planning items.
    For more information, see Activate a scheduled job to create financial baselines for your projects.
11. Activate and define a scheduled job to generate labor costs for your projects based on the attribute-based resource assignments.
    For more information, see Activate a scheduled job to generate labor costs for your projects.

Enable monetary benefit plans for projects

Enable the benefit plans property to create and manage benefit plans for planning items.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Properties** > **Properties**.
2. Filter the Name column to locate and open **sn_invst_pln.enable_benefit_plan_in_new_financials** property.
3. Enter **true** in the Value field.
4. Select the **Update** button.

Enable financial budget allocation for projects in Project Workspace

Enable allocation property after migrating to Next Experience to work on budget allocation for your projects using Project Workspace.

Before you begin

- For new customers accessing financials in Next Experience, this property is enabled by default.
- Role required: admin

Procedure

1. Navigate to **All** > **System Properties** > **Properties**.
2. Filter the Name column to locate and open **sn_invst_pln.enable_budget_allocation_v2** property.
3. Update the Value field to **True** and select **Update**.

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What to do next

Configure budget attributes to work on managing budget of your planning items. For more information, see Configure budget attribute at instance-level to allocate budget.

Configure budget attribute at instance-level to allocate budget

Configure the budget attribute by expense type or cost type as an instance-level to work on budget allocations for your projects using Project Workspace.

Before you begin

- Enable the budget allocation property to work on budgeting for projects. For more information, see Enable financial budget allocation for projects in Project Workspace.
- Role required: admin

Important:
Existing customers cannot change the budget attribute to cost_type.

Procedure

1. Navigate to **All** > **System Properties** > **Properties**.
2. Filter the Name column to locate and open **sn_invst_pln.budget_allocation_attribute** property.
3. Update the Value field to one of the following.
   - **cost_type** - view financials by cost types such as Hardware Opex, External labor Capex, Software Capex, Software Opex, and so on.
   - **expense_type** - view financials by expense types such as Capex and Opex.
4. Select **Update**.

Enable expense type on resource assignments

Resource assignments have the same expense type as the project or demand for which they're created. Enabling expense type on resource assignments helps you to accurately expense different type of expenses for your work.

Before you begin

Role required: admin

Procedure

1. Active and execute the scheduled job.
   a. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
   b. Filter the name field to locate and open **Update task type planning attributes on resource assignments**.
   c. Select the **Active** option to activate the schedule job.
   d. Edit the fields on the Scheduled Script Execution form to customize the job and meet your requirements.

      For more information about the field description and scripts, see Automatically run a script of your choosing.

   e. Select **Execute Now** to execute the scheduled job or select **Update** to save your changes.
2. Enable expense type on resource assignments.

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a. Navigate to **All** > **System Definition** > **Tables**.

b. Filter the name field to locate and open the **sn_plng_att_core_resource_assignment** table for resource assignments.

c. Select the **Show List** related link.

d. Select the **Personalize List** ( ) icon.

e. In the Personalize List Column, add **Expense type** from the Available list to the Selected list.

f. Select *OK*.

Result

Expense type field is enabled on resource assignments for the projects and demands. You can expense different expense types to record different work types such as Capex or OpEx.

Customize the left pane view for financials

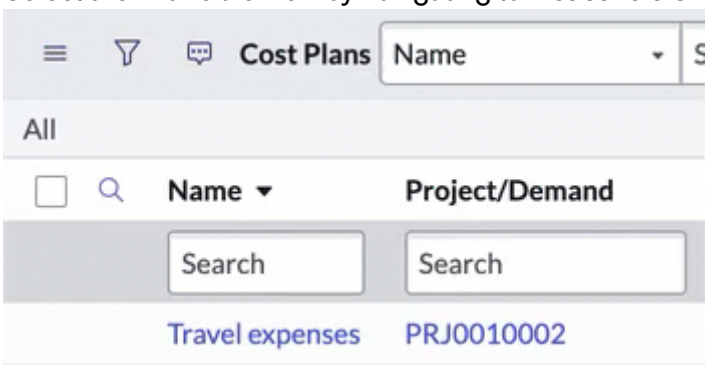
Customize the left pane for financials to view custom field information.

Before you begin

Role required: admin

Procedure

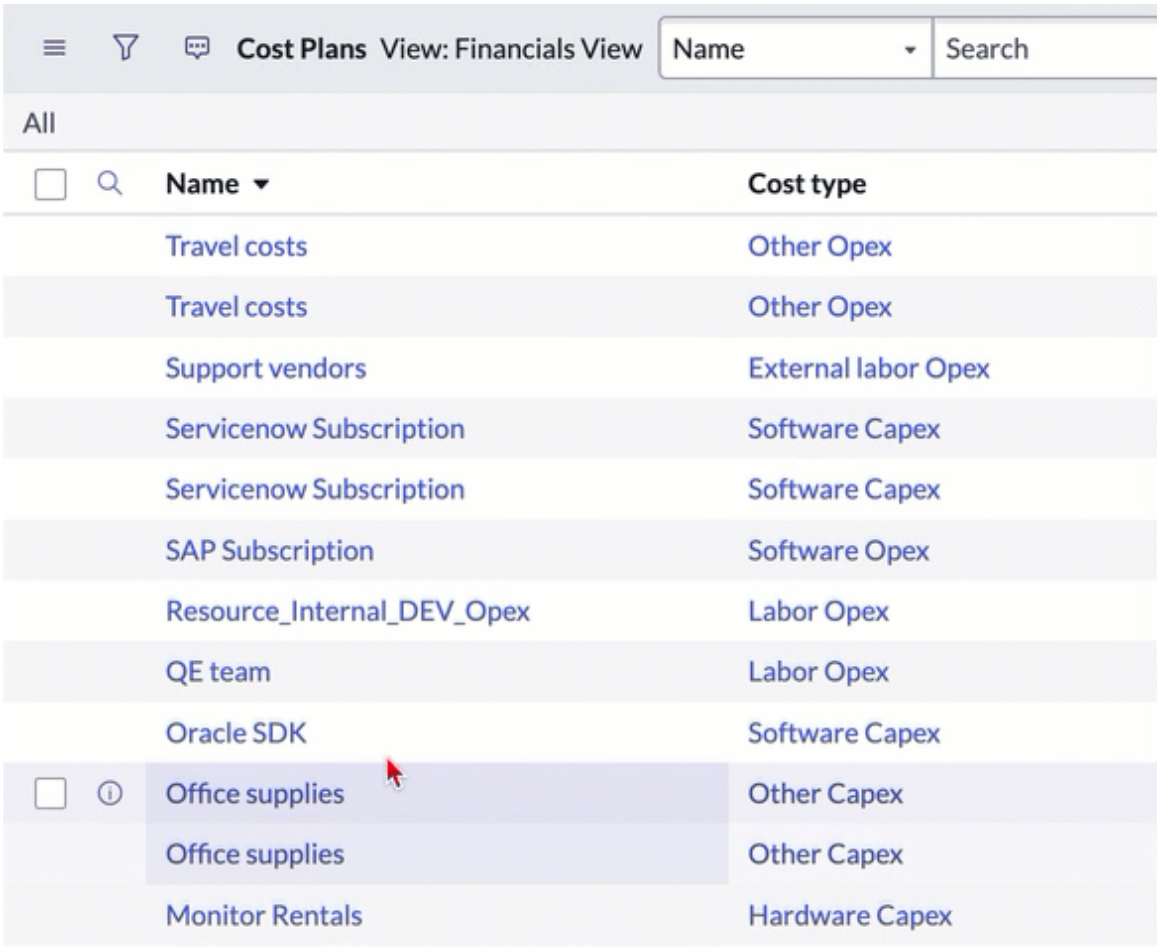
1. Navigate to **All** > **System Definition** > **Tables**.
2. Filter the Label field to locate and open the **Cost Plan** table.
3. Select the **Show List** related link.
4. Select the financials view by navigating to **List controls** > **View** > **Financials View**.



The selected view ( ) is displayed on the header.

5. Select the header options to configure list layout.

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6. Add or remove the fields in the Selected column to customize the left pane view in financials view.
7. Select **Save**.

Result
Cost plans table with customized fields for Financials View is displayed.

Customise cost plan form

Manage the fields required on the new cost plan form as per your organization needs.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **System Definition** > **Tables**.
2. Filter the Label field to locate and open the **Cost Plan** table.
3. Select the **Design Form** related link.
4. On the header row, select **Cost Plan [cost_plan]** from the table list and **Financials View** from the view list.
5. On the form, you can:
   - Drag and drop the required fields from the Fields column.
   - Remove the existing fields using the Remove field icon.
6. Select **Save**.

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Activate a scheduled job to migrate budget of your projects

Activate the **Migrate budget for active demands and projects** scheduled job to migrate budget of active projects from Classic UI to Next Experience.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Filter the name field to locate and open **Migrate budget for active demands and projects**.
3. Edit the fields on the Scheduled Script Execution form to customize the job and meet your requirements.
   For more information about the field description and scripts, see Automatically run a script of your choosing.
4. Select **Execute Now** to execute the scheduled job or select **Update** to save your changes.

Configuring security for a project in Project Workspace

Configure security in a project to make the project confidential to ensure that only the authorized users can access the project and its sub projects and related entities.

You can make sensitive projects visible and accessible only to specified users and user groups. The security settings applied to a project also apply to sub projects, forms, and related entities of the project, ensuring that all project-related data remains protected and accessible only to the authorized personnel.

To enable these advanced security features, you need to install the Project Advanced Security plugin. The plugin requires the PPM Standard plugin as a prerequisite.

Related topics

Activate the Project Advanced Security plugin

#unique_1131

Activate the Project Advanced Security plugin

Activate the Project Advanced Security plugin to enable project security settings on a project.

Before you begin
Role required: admin

Procedure

1. Select **All** > **System Definition** > **Plugins**.
2. Search for **Project Advanced Security** and install it.

Related topics

Configuring security for a project in Project Workspace

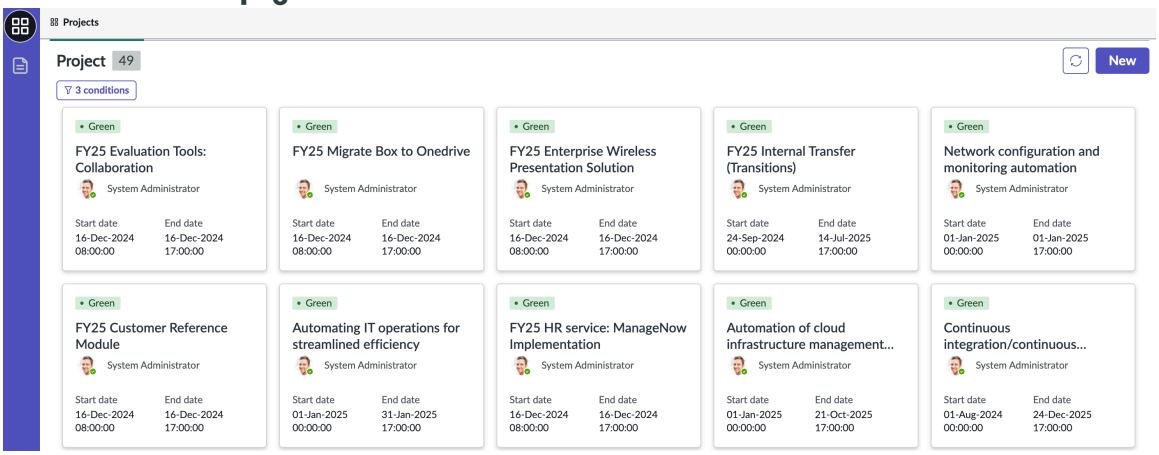
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Managing projects with Project Workspace

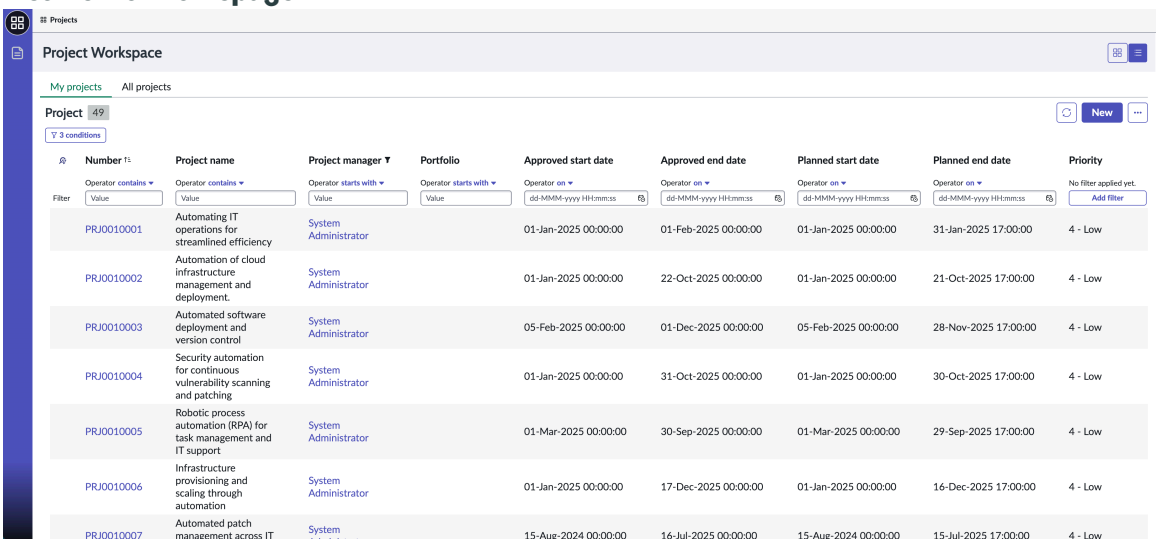
Use the features of Project Workspace to plan and manage your project.

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Grid view of Homepage



List view of Homepage



The homepage contains the following UI components to help you navigate through the workspace.

Project Workspace homepage UI

Feature	Description
Grid view of projects ( )	Opens the project in grid view or card view.
List view of projects ( )	Opens the project in list view.
My Projects	This section displays all the projects that you own, including subprojects.
All Projects	This section displays all projects in the system. All projects include projects from customer projects, team spaces, and audit.

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Project Workspace homepage UI (continued)

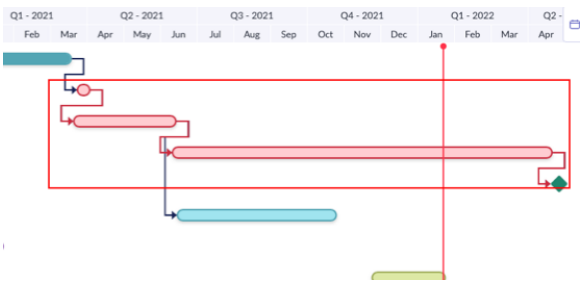
Feature	Description
Projects	This section displays only projects.
Subprojects	This section displays only subprojects.
Project cards	Each project is represented by a project card. These cards display high-level details, such as the project name, status, planned dates, and the manager that the project is assigned to.
Project search	Option to search for projects by name or by the user it's assigned to.
Filter	Option to apply filters on the homepage. The filter preferences that you choose are retained in the filter criteria.
Refresh	Reloads the homepage.
New	Option to create a project.

Planning header

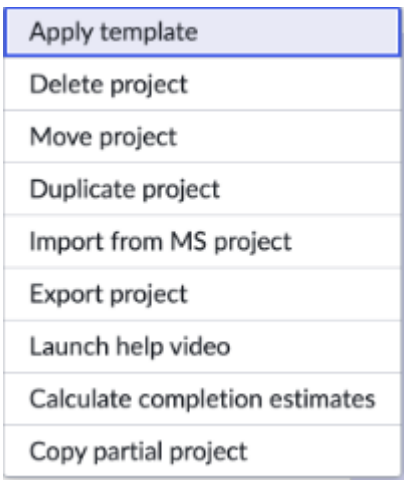
The header displays the project name and provides the following various options.

Name	Description
Edit project details ( )	Opens the project details in the side panel to edit. See Create a project from Project Workspace.
Activity ( )	Facilitates conversation between different stakeholders. See Collaborate with stakeholders from Project Workspace.
Attachments ( )	Enables you to add files to the project. See Collaborate with stakeholders from Project Workspace.
Refresh the project ( )	Reloads the planning page.

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Name	Description
Save ( )	Saves your changes. This button is inactive by default to facilitate auto-save of any changes made to the project plans. Enable or disable the auto-save functionality from the Advanced tab of the Settings ( ) panel.
Resources not synced ( )	Enables you to synchronize the project and resource assignment dates. When there's a change in the planned or actual dates of the project tasks, this icon is enabled. When the project has classic resource plans, this icon is inactive by default.
Resource plan	Enable this toggle to display the resource assignment pane.
All	Displays data in both grid and gantt view on planning page. This button is active by default.
Gantt	Displays data in Gantt view on planning page. Use this button to change task dates and dependencies.
Grid	Displays data in Grid view on planning page. Use this button to add and delete tasks, change task dates and dependencies, and assess the progress of the overall project.
Baselines ( )	Enables you to create and compare schedule and financial baselines. See Create and compare project baselines in Project Workspace.
Critical path ( )	Toggle the button to switch on/off the display of the critical path of the project. 

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Name	Description
Add Task 	Adds a project task in the data grid. See Create and assign project tasks from Project Workspace.
Project actions ()	Provides other actions to perform on the project. • Apply template • Delete project • Move project • Duplicate project • Import from MS project • Export project • Launch help video • Calculate Completion Estimates • Copy partial project  Synchronize the project's date with the start dates of the associated resource plans, cost plans, benefit plans, resource assignments, project tasks, and subprojects using **Move Project**.

Resource assignment pane

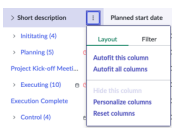
The resource assignment pane contains the following UI components to help you manage your resources from Project Workspace.

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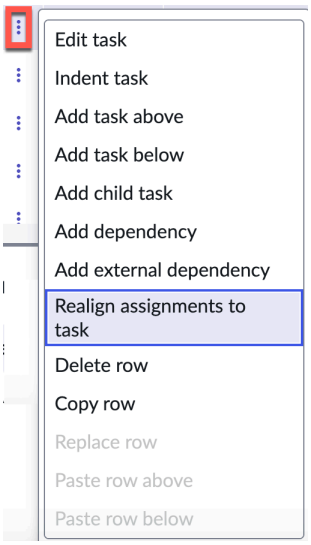
Name	Description
Refresh the resource assignment ( )	Reloads the selected assignment and allocation.
Allocation heatmap	Displays the resource allocation in the resource assignment pane.
FTE	Displays the effort type as FTE, Hours, or Person days.
Month	Displays the effort by week or month. This button is displayed only when the Allocation heatmap toggle is enabled.
Add resource	Add a resource in the resource assignment pane.

Data grid

The data grid shows the list of project tasks and subprojects in rows, and the following options to perform actions on the rows. If a project has subprojects, you can drill down into the tasks and scheduling of these subprojects too.

Option	Description
Column actions	Sort and filter the project tasks using the actions on the header. Point your mouse device to a column header to see the context menu icon ( ). Using this menu, you can perform actions such as autofit, hide, or reset. If you select the context menu ( ) for certain columns, such as Short description or State, you can also filter the project task rows. 
Rearrange rows ( )	Enables the dragging of the project task rows to a position of your choice on the grid.
Select row ( )	Choose to select multiple project task rows at once.

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Option	Description
	Use the row context menu (⋮) to perform various actions.
Row context menu (⋮)	Provides various actions for the selected rows, such as edit task, add task above or below, delete row, add dependency, and more. You can also select multiple rows and perform an action on them at once, using the row context menu. For example, indenting or deleting multiple tasks. 
Expanded row (⌄)	Indicates that a project task row is expanded to show its child tasks. Select this icon to collapse the row and hide the child tasks.
Collapsed row (›)	Indicates that the project task contains child tasks. Select this icon to expand the row and view the child tasks.
Reorder column (↑/↓)	Reorders the columns of the data grid.
Edit an individual cell	Edit or copy the info of this cell by selecting the cell context menu (⋮) or select and hold (or right-click) a cell. Use this menu to copy and paste cell contents, add dependencies, add project tasks directly above or below this cell position, or delete the whole row.

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Option	Description
Edit multiple cells	Bulk-edit cells by selecting multiple cells and select and hold (or right-click) one of the cells. You can also use the cell context menu ( ) for more options.

Selecting a project task by selecting its short description opens the task details in a side panel, enabling you to edit them. See Update a project task from the Project Workspace.

You can also increase or reduce the area occupied by the data grid by dragging the line that separates them.

Timeline view

The timeline view shows the project timeline based on its planned start and end dates, and displays the project task bars and milestones.

By using the planning settings ( ), you can choose to display the bar labels, dependency lines, and the critical path. See Personalize the planning page view in Project Workspace.

Project timeline

The timeline shows the planned period of the project. You can reduce or increase the visibility of the project period by changing the timescale to Year, Quarter, Month, Day, or Week. Select the timescale icon ( ) and choose an option.

The timescale view that you choose is saved in the preferences.

Dependency lines

These lines show the dependencies between the project tasks. You can add new dependencies by drawing them on the timeline view, or select an existing dependency to edit its details in the side panel. See Add internal project task dependencies from Project Workspace. The dependencies that you choose are saved in the preferences.

Access the new Project Workspace

Learn how to navigate to the new Project Workspace and open a project in the planning page.

Before you begin

Install Project Workspace.

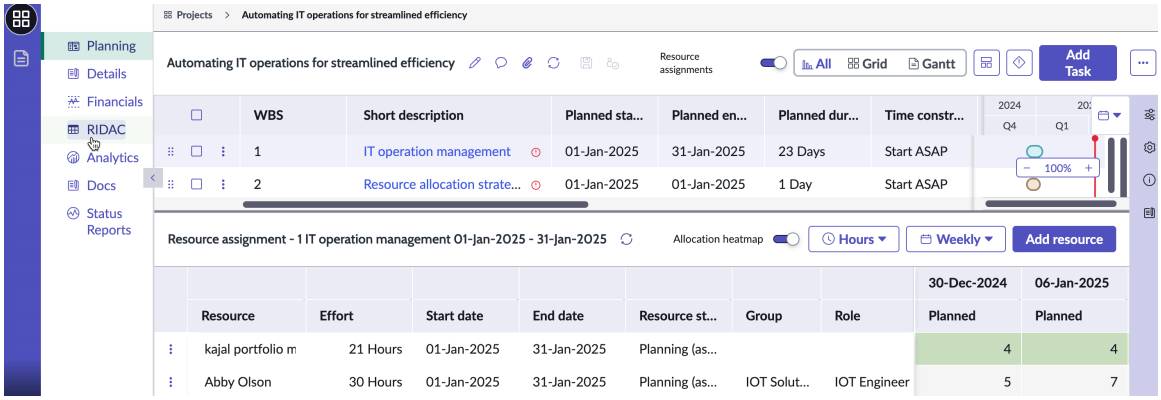
Role required: it_project_manager

Procedure

1. Navigate to **Workspaces** > **Project Workspace**.
2. Depending on the projects that you want to view, select **My Projects** or **All Projects**.

   Projects on the homepage can be viewed in card or list view.
3. Select a project to open it in the planning page.

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You can access and manage Planning, Details, Financials, RIDAC, Analytics, Docs, and Status Reports using the list that appears when you select the Projects icon. This list is also called as Level two (L2) menu.

What to do next

Create a project from Project Workspace

Create a project from Project Workspace

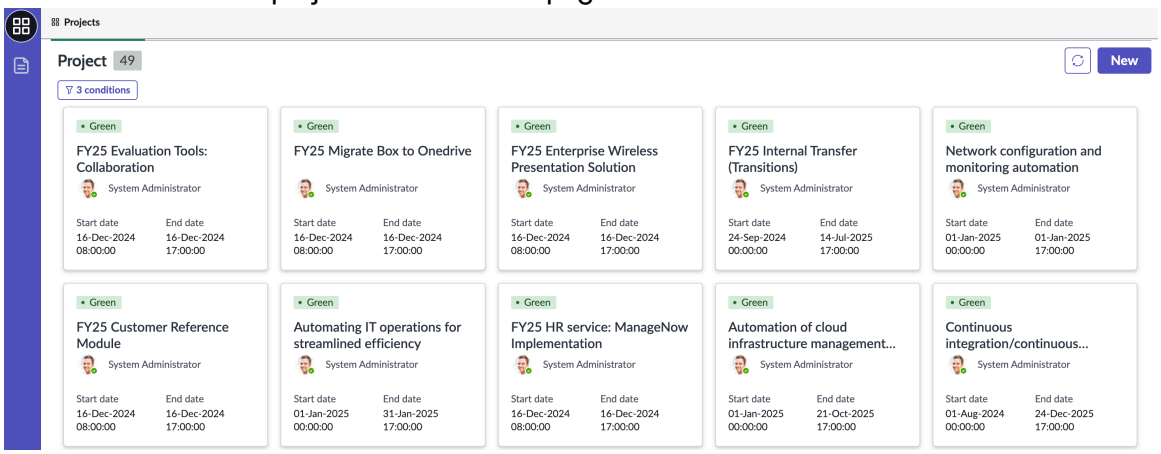
Use Project Workspace to create a project and start planning for your project tasks.

Before you begin

Role required: it_project_manager

Procedure

1. Navigate to **Workspaces** > **Project Workspace**.
2. Select **New** to create project from the homepage.



3. On the form, fill in the fields.

   For field information, see Project form of Project Workspace.

4. Select **Confirm**.

What to do next

- Update the project details from Project Workspace
- Personalize the planning page view in Project Workspace

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Update the project details from Project Workspace

Update the details of a project to reflect the updates or changed priorities using the details page from Project Workspace.

Before you begin

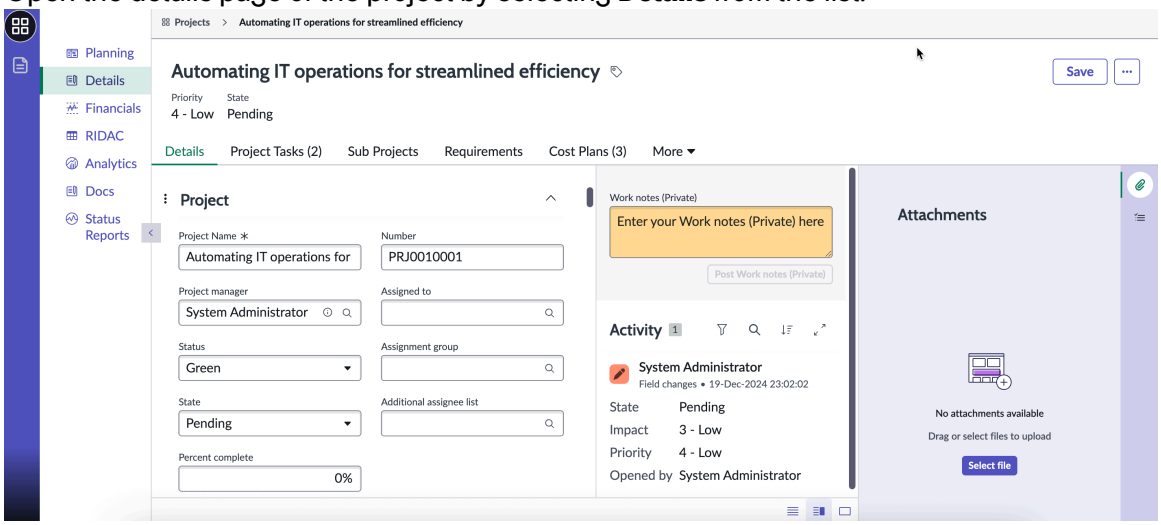
Role required: it_project_manager

About this task

You can edit the Project, project dates, business case, financials, score, notes, and preferences for a project. Use the related tabs on the details page to view and edit the Project tasks, Sub-projects, Requirements, Resource Plans, Cost Plans, Monetary, and others.

Procedure

1. Open a project from the planning page of Project Workspace.
   For information on how to navigate to the planning page, see Access the new Project Workspace.
2. Open the details page of the project by selecting **Details** from the list.



3. Edit the fields that you want to update.

   In the Project Workspace, you can add stakeholders, extend or confirm a resource plan, and add new resource allocations daily. You can also view the status report of the program and save the project as a template with the **Save as New Template** option.

   From the Project Workspace, you can create an Agile phase or a Test phase. You can also create stories or add existing ones to the project, as well as add new epics.

   You can refine project description using the write planning item skill if you have Now assist for SPM application installed.

4. Select **Save**.
   You can view the project or project task details from the side panel. Select Open task in the new tab ( ) icon to open the project in a new tab. You can use the Full Details page to add work notes, attachments, and view related lists of a project or task.

Analyze project analytics from Project Workspace

View the summary of a project in Analytics tab of Project Workspace.

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Before you begin

Note:
The Project Summary Waterfall, Hybrid, and Scrum dashboards are available in the Next experience UI framework.

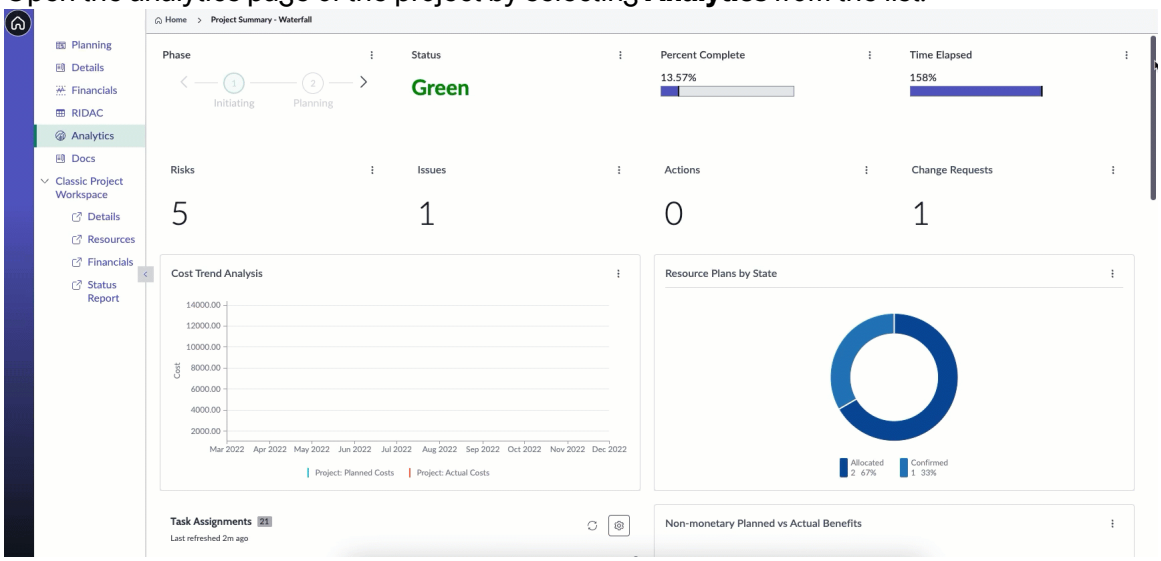
Role required: it_project_user

About this task

The Analytics tab is a dashboard that showcases preconfigured widgets and reports to monitor the progress of a project, including aspects like open risks, actual costs, and delayed milestones. The reports aggregate data from the fields in the project form. For details on the various widgets and reports available for different project types, see the Project analytics widgets and reports.

Procedure

1. Open a project from the planning page of Project Workspace.
   For information on how to navigate to the planning page, see Access the new Project Workspace.
2. Open the analytics page of the project by selecting **Analytics** from the list.



3. Review the displayed reports and take necessary actions, if required.

Widgets and reports for project analytics

Widgets and reports that provide information for the project summary in the Analytics page of the project workspace for Agile, Waterfall, and Hybrid projects.

Project widgets and reports

Widgets and reports provide information that enables you to view and track the progress of your Agile, Waterfall, and Hybrid project.

Note:
You must have the Agile Development 2.0 plugin installed to view the widgets and reports for your Agile and Hybrid projects. The Project Summary Waterfall, Hybrid, and Scrum dashboards are available in the Next experience UI framework.

Your system administrator can configure the widgets and reports in the dashboard to display project information on the **Analytics** page. The following dashboards are available:

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Project Execution Type	Dashboard Displayed	Description
Hybrid	Project Summary – Hybrid	Contains reports and widgets for hybrid projects.
Agile	Project Summary – Scrum	Contains reports and widgets for agile projects.
Waterfall	Project Summary – Waterfall **Note:** This dashboard was previously known as Project Manager Summary Dashboard.	Contains reports and widgets for waterfall projects.

The project execution type determines the dashboard displayed on the **Analytics** page.

You can also embed a custom dashboard in the **Analytics** page. Your system admin can modify the *PMViewDataUtils* script include and configure the variable value for the *dashboards_tabs* in the *getDashboardUrl* method. As a result, you can view the custom dashboard in Project Analytics. For example:

```
var dashboards_tabs =

      {
            waterfall: {
                        dashboard_sysId:
 '5d4959dd878003008b9b3a0548cb0bd0',
                        tab_sysId:
 '1d99d5dd878003008b9b3a0548cb0bbd'
                              },
            hybrid: {
                        dashboard_sysId:
 '96dc46c78700330047d84c2c59cb0bf1',
                        tab_sysId:
 '520d4ac78700330047d84c2c59cb0bab'
                              },
            agile: {
                        dashboard_sysId:
 'f3dd4ec78700330047d84c2c59cb0b93&tab',
                        tab_sysId:
 '52fd8ec78700330047d84c2c59cb0bae'
                              },
            any_other_executionType: {
                        dashboard_sysId:
 'custom_dashboard_sys_id',
                        tab_sysId:
 'custom_dashboard_tab_sys_id'
                              },
        };
```

The following widgets and reports for all project types are provided in the **Analytics** page to help the project manager analyze the project.

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Widgets and reports for Agile project

Name	Description
Stories Missing Acceptance Criteria	Number of stories in the project without acceptance criteria information.
Stories Missing Points	Number of stories in the project with the **Points** field blank.
Stories Acceptance Overdue	Number of stories in the project that are not in the Completed or Cancelled state after the sprint end.
Team-wise Sprint Status	Track the sprint-wise status of various scrum teams across the release. Click the team name to view sprint details.
Stories by State	Donut chart showing the number of stories in different stages of development such as Draft, Ready, and WIP. Click the appropriate state to view details of the stories.
Progress by Points	Track the progress of the project based on points. You can group and stack stories based on any combination of Epic, Assignment group, and State.
Progress by Stories	Track the progress of the project based on the number of stories. You can group and stack stories based on Epic, Assignment group, and state.

Widgets and reports for Waterfall and Hybrid project

Name	Description
Issues	Number of issues in the Pending, Open, and Work In Progress states included in the project.
Actions	Number of action items in the Pending, Open, and Work In Progress states for the project.
Change Requests	Number of change requests in the Pending, Open, and Work In Progress states for the project.
Stories by State	Pie chart showing the number of stories in different stages of development such as Draft, Ready, and WIP. Click the appropriate state to view the details for the stories. **Note:** This widget is applicable for Hybrid projects only.
Tasks by State	Donut chart showing the number of project tasks in different stages of development such as Pending, Open, Work In Progress, and

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Widgets and reports for Waterfall and Hybrid project (continued)

Name	Description
	Closed Complete. Click the appropriate state to view the task details.
Project Member Allocation Details (Hrs)	Stacked bar chart showing allocated and actual hours of the resources assigned to the project.
Project Member Allocation Details — Monthly (Hrs)	Pivot chart showing the monthly allocated and actual hours for the resources assigned to the project.
Task Assignments	Track the state of various project tasks across the release based on the assigned users or group. Click the user or group name to view the details of the assigned tasks.
Resource Plans by State	Donut chart showing the number of resource plans grouped according to their current state.
Overdue Tasks and Milestones	List of overdue project tasks and milestones, which are the tasks that satisfy either of the following conditions in the Project Task [pm_project_task] table: • The value of the **Planned start date** is before today's date and the **State** value is Open or Pending. • The value of the **Shadow** field is set to false.
Upcoming Tasks (next 2 weeks) with no assignee	List of unassigned Open or Pending project tasks that are planned to start 14 days from the current date.

Common widgets

Name	Description
Phase	Current state of the project such as Initiating or Planning.
Status	Color indicator that signifies the status of the project.
Percent Complete	Percentage of the project that has been completed.
Time Elapsed	Amount of time that has passed while working on the project from the actual start date to the planned end date. If the project is in the Open or Pending state, then the time elapsed is calculated based on the Planned start date and the current date.

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Common widgets (continued)

Name	Description
Risks	Number of risks in the Pending, Achieved, and Not Achieved states concerning the project.
Cost Trend Analysis	Line graph showing a comparison between the planned costs and actual costs on a monthly basis.
Monetary Benefit Trend Analysis	Line graph showing a trend of planned financial benefits on a monthly basis.
Non-monetary Benefit Plans	Breakdown of the number of non-monetary benefit plans for active projects along with its associated benefit plans.
Non-monetary Planned vs Actual Benefits	Comparison of total planned and actual non-financial benefits for active projects grouped by fiscal period.
Confirmed vs Allocated vs Actual Hours	Comparison of total confirmed, allocated, and actual hours for the project.
Time Cards — Pending Approval	Time cards for the selected project that are submitted but not yet approved.
Time Card — Exception Report	List of users who did not submit their time cards for the selected project, and time cards that are not yet approved for the selected project. The exception report is generated for users who are assigned to a task in progress, or hard-allocated to the project or task.

Personalize the planning page view in Project Workspace

Customize the display of the planning page. Choose the data you want to see on the data grid and the timeline.

Before you begin

Role required: it_project_manager

About this task

Steps 2 through 4 provide guidance on customizing various aspects of the workspace. Choose the options that you want to apply.

Procedure

1. Open a project from the planning page of Project Workspace.
   For information on how to navigate to the planning page, see Access the new Project Workspace.
2. Use the side panel to customize your planning page view.

   a. Select the Settings icon ( ).
   The Settings side panel opens.

   b. From the Columns tab, select the columns that you want to see on the data grid of the planning console.

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These columns provide information of the project tasks.

c. From the General tab, choose the attributes that you want to see on the timeline view, such as the dependency lines, critical path, or the project task names on the bars.
Use the Display summary task option to show all the project tasks grouped under one project summary task.

d. From the Advanced tab, choose to enable the auto-save option, change the date format for the planned date columns, and change the mode of calculation as Manual or Automatic.
You can change the calculation mode from Automatic to Manual, from the workspace, only if the project has no tasks.

3. View additional columns to the project tasks in the planning page view.

If you want additional columns to be displayed in the planning page view, other than those fields available in the side panel, you can do so by customizing the Project Workspace view of the project task list (pm_project_task_list.do). See Add new columns to the planning page.

Note:
You can personalize your settings for timescale, Displaying summary tasks, Bar labels, and Dependency lines. Any changes you make to the Display summary task settings and timescale view is saved in the preferences.

4. Reduce or increase the visibility of the project period on the timeline by changing the timescale.

Select the timescale icon ( ) and choose from Day, Week, Month, Quarter, Year, or Autofit.

Add new columns to the planning page

Display new columns on the planning page of the new project workspace so that your project managers can view custom fields for the project tasks on the planning page.

Before you begin
Role required: it_project_manager

About this task
The project tasks displayed in the planning page of the new project workspace show the fields as per the Project Workspace view of the pm_project_task table. To display new fields, you must personalize this Project Workspace view of the pm_project_task table.

Procedure
1. Navigate to **pm_project_task_list.do**.
2. Change the view to Project Workspace.
   a. Right-click the header and select **View**.
   b. Select **Project Workspace**
3. Add the necessary columns to the list.
   a. Select the Personalize List icon ( ).
   b. Move the required fields from Available to Selected.
   c. Select **OK**.

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Result
The Project Workspace view of the pm_project_task table is updated as per your changes. The planning page of the new project workspace reflects these changes.

Create and assign project tasks from Project Workspace

Add new tasks for your projects and assign them to your team directly from the new Project Workspace.

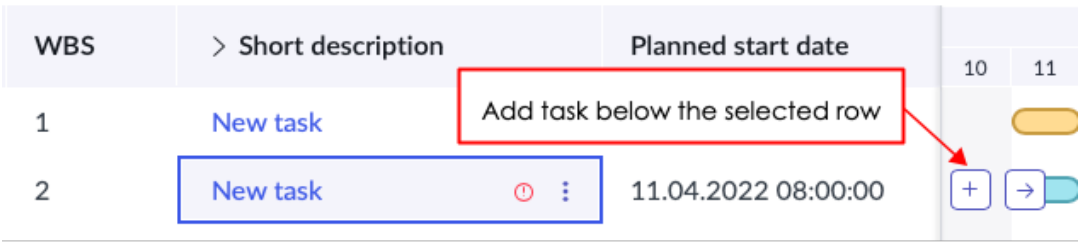
Before you begin
Role required: it_project_manager

Procedure

1. Open a project from the planning page of Project Workspace.
   For information on how to navigate to the planning page, see Access the new Project Workspace.
2. Select **Add Task**.

   A new row is added to the bottom of the data grid of the planning page, with **New Task** as the default name for the task.

   Alternatively, select a project task row and click the Add task below icon ( ). This action adds a new task right below the task that you



   selected.
3. Edit the details of the task.
   For example, task name, planned dates, assigned to, and others.
4. **Optional:** Press the Enter key to save the details and create a row for another task.
5. Click anywhere on the data grid outside the task fields to save the details.
6. Assign a task to a user by updating the **Assigned to** field.

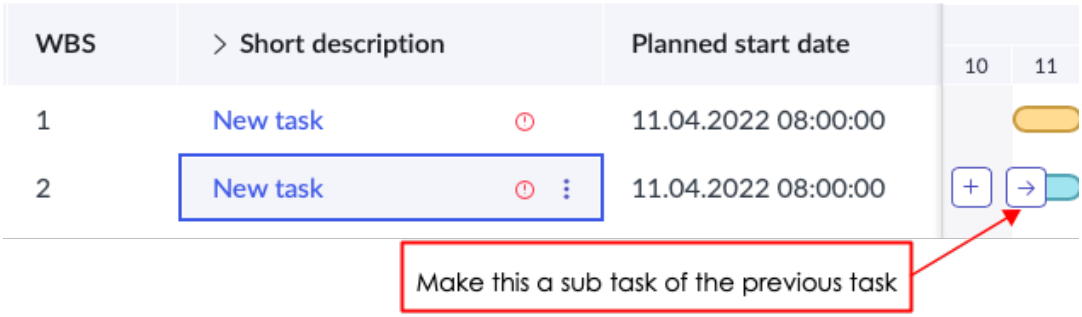
   The user who is assigned this task to, is sent an email notification and is also notified in the ServiceNow® instance when they log in.

   For notifications to work, your admin must enable them by setting the **Project task assigned to** notification record as **true** in Email Notifications and Provider Notifications.

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What to do next

- Make the new task a subtask of an existing task or a sub project by using the indent task icon( ).



- Update a project task from the Project Workspace.

Update a project task from the Project Workspace

Update the details of existing tasks from the planning page of the Project Workspace.

Before you begin

Role required: it_project_manager, it_project_user

Procedure

1. Open a project from the planning page of Project Workspace.
   For information on how to navigate to the planning page, see Access the new Project Workspace.
2. From the list of tasks on the data grid, select a task that you want to update.
   The task details open in the side panel.
3. Edit the fields.
4. Select **Update**.

Create checklist items for a project task

Create checklist items for a project task to track items to be completed in the task.

Before you begin

Role required: it_project_user, it_project_manager

Procedure

1. Open a project from the planning page of Project Workspace.
   For information on how to navigate to the planning page, see Access the new Project Workspace.
2. Navigate to a project task.
3. From the Planning page, select **Add items** in the **Checklist** section and enter a name for the item.
   You can also add checklist items from Details page. Select project tasks and then select the checklist icon ( ) from the side panel to add checklist items. You can add, edit, organize, or remove checklist items as needed.

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4. Select **Save** to save the checklist items.
   To edit a checklist item for a task, select **Edit** in the checklist section. This option appears when there is at least one checklist in the **Checklist** section. To remove a checklist from the project task, select the **Edit** and select remove item icon ( ).

Related topics

Project task checklist items

Add internal project task dependencies from Project Workspace

Create dependencies between project tasks using the interactive UI of Project Workspace.

Before you begin

Ensure that you have the Dependency Lines toggle enabled on the settings of the timeline. For information on how to update the settings, see Personalize the planning page view in Project Workspace.

Role required: it_project_manager

Procedure

1. Select a project to open it from the planning page.
   For information on how to navigate to the planning page, see Access the new Project Workspace.
2. Create task dependencies in one of the following ways.
   The created dependency is shown as a line between the two task bars, on the timeline view.

What to do next

You can edit the dependency. For more information, see Update the dependency details for tasks from Project Workspace.

Update the dependency details for tasks from Project Workspace

Update the details of the dependency including its type and lag time from Project Workspace.

Before you begin

Role required: it_project_manager

Procedure

1. Open a project from the planning page of Project Workspace.
   For information on how to navigate to the planning page, see Access the new Project Workspace.
2. Open the dependency side panel in one of the two ways.

3. Edit the fields.
4. Select **Update**.

Add external dependencies between projects from Project Workspace

Set up a dependency between tasks of different projects using the new Project Workspace.

Before you begin

Role required: it_project_manager

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About this task

External dependencies help you understand the impact on project schedules when there is a change in the predecessor task. Use the row context menu of your project task to add a dependency from the task of a different project.

Procedure

1. Open a project from the planning page of Project Workspace.
   For information on how to navigate to the planning page, see Access the new Project Workspace.
2. From the data grid, select the project task to which you want to add the dependency.
3. Select the row context menu (⋮) of the task and select **Add external dependency**.
4. On the External Dependency form, select the **Project** to which the external task belongs.
5. Select the **Task** for which the dependency is added.
6. Select the **Dependency type**.
7. Select **Submit**.
   The default selection is **Hard**. In a hard dependency, any changes made in the predecessor project are automatically propagated to the successor project.

Result

- Dependency is created for the tasks of the two projects.
- The short description of your project is greyed out and is renamed to indicate the external dependency in the format of **External project name: External task name**
- A link icon (🔗) is added to the short description cell of the task, to indicate the dependency.

What to do next

You can navigate to the external project directly from the current project to view the status or update the details of the predecessor task. From the row context menu of the dependent task, select **View project**.

Related topics

External dependencies

Create and compare project baselines in Project Workspace

Create a schedule baseline and financial baseline of a project. A baseline is a snapshot of the project's progress at the particular moment of time.

Before you begin

Role required: it_project_manager

About this task

Create as many baselines as necessary to review the changes made to and progress of your project by comparing these baselines. Comparing baselines helps you understand the real-time deviations between planned and actual values of the project tasks.

Note:
If your project has sub projects in it, you cannot create baselines for them from the planning page view.

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Procedure

1. Open a project from the planning page of Project Workspace.
   For information on how to navigate to the planning page, see Access the new Project Workspace.
2. Create a baseline for the project.

   a. Select the Baselines icon ().

   b. Select **Create new**.

   c. On the form, fill in the fields.
   Provide the name and description for the baseline, and select Schedule baseline or Financial baseline, or both.

   d. Select **Save.**

   A baseline is created for the current day and is listed when you select Baselines ().
3. Compare baselines for the project.

   a. Select the Baselines icon ().

   b. From the list of available baselines, select the ones that you want to compare.
   You can select up to two baselines.

   c. Select **Apply**.

   - On the timeline view, the baseline appears as a set of grey lines below the task bars. These grey lines represent the planned dates while the task bars represent the actual dates.
   - On the grid view, you can add the columns related to baselines that show the following information of the selected baselines. You can select these columns from the Settings side panel ()
     - Start date
     - End date
     - Variance

   Trouble?
   If you don't see the baseline columns on the data grid, refresh the workspace using the Refresh icon  .

Create a status report template in Project Workspace

Create a custom template for status reporting in Project Workspace. Use the template to create status reports according to your specific requirements.

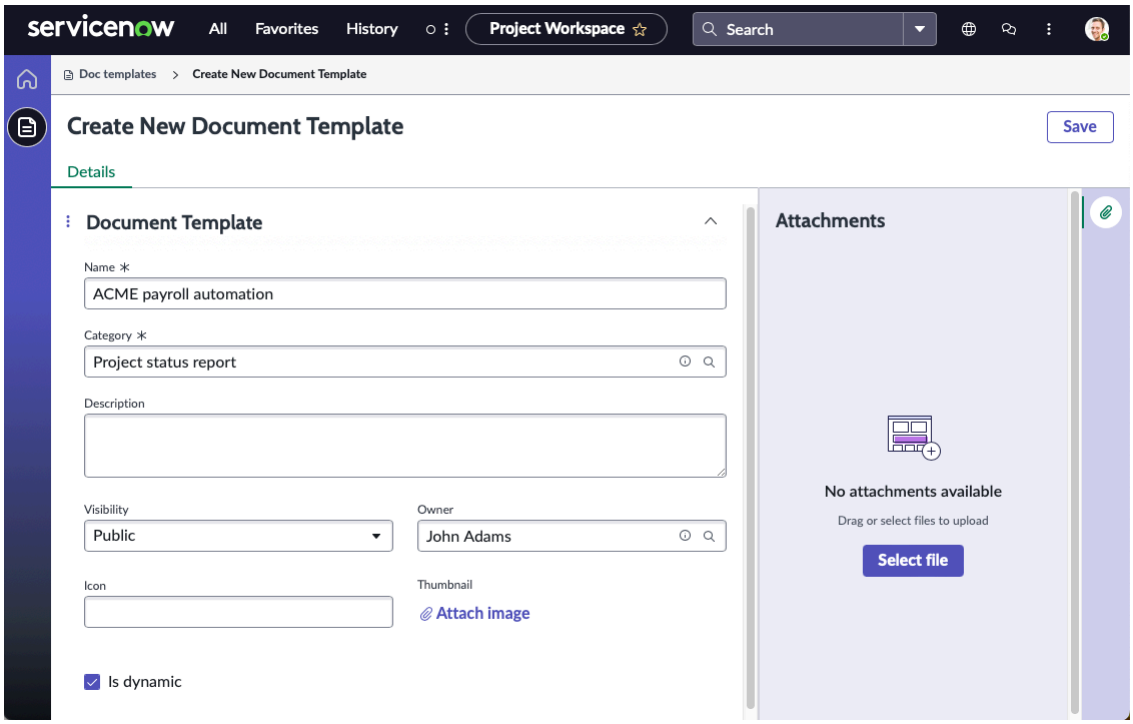
Before you begin
Role required: it_project_manager

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Procedure

1. Open a project from the planning page of Project Workspace.
   For information on how to navigate to the planning page, see Access the new Project Workspace.
2. Select **Doc Templates** .
3. Select **New**.
4. On the Create new document template form, fill in the fields.

   For a description of the field values, see Create new document template form.



5. Select **Save**.

Note:

In the Project Workspace, you need the it_project_manager role to create a document template. The option to create a document template from the Project Workspace is available only if you hold the project manager role.

If your role has create access for doc templates on the platform, you can create template, even if you do not have the it_project_manager role.

Result

The template you created appears as an option when you try to create a status report: Create a status report in Project Workspace.

Related topics

- Status reporting in Project Workspace
- Create a status report in Project Workspace
- Analyze the status report in Project Workspace
- Duplicate a status report in Project Workspace

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Import old project status report to Project Workspace

Add dynamic content to status report in Project Workspace

Create a status report in Project Workspace

Create a status report in Project Workspace for your projects. Your team can view the report and be updated on project health, metrics, risks, issues, and milestones.

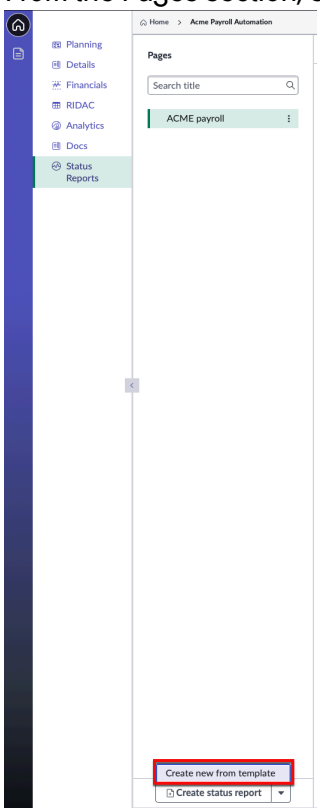
Before you begin

Role required: it_pps_admin, it_project_manager

About this task

Procedure

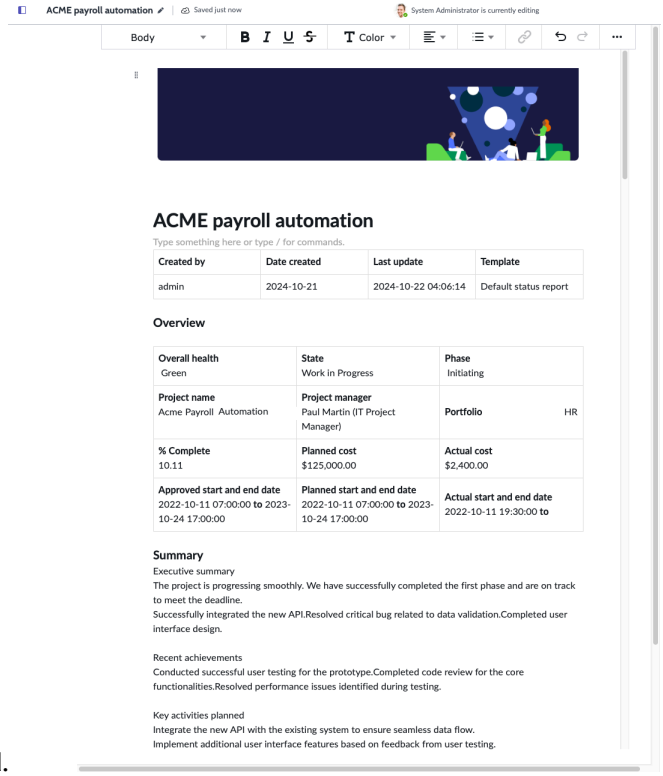
1. Open a project from the planning page of Project Workspace.
   For information on how to navigate to the planning page, see Access the new Project Workspace.
2. Open the Status reports page of the project by selecting **Status Reports** from the list.
3. From the Pages section, select **Create status report**.



4. **Optional:** If you want to base your status report on a template, then select **Create status report from template**.
5. In the "Welcome to your Template Center!" screen, select **Use** for the template that you want to use.
6. On the Create status report form, fill in the fields.
   For a description of the field values, see Create status report form.
7. Select **Submit**.

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The status report appears with the data and information that you entered



populated.

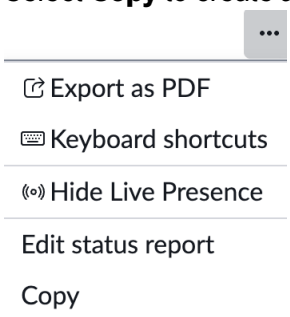
8. **Optional:** Select the **More actions** icon and then perform these steps.

   a. Select **Export as PDF** to share and archive a PDF version of the report.

   b. Select **Edit status report** to open and edit the status report.

   c. Select **Hide Live Presence** to hide the live presence.

   d. Select **Copy** to create a copy of status report.



   You can't edit the status report. To edit the status report, you can disable the status report read-only system property (sn_pw.status_report_doc_read_only). By default, it is set to true, and the status report is read only. This property can be enabled or disabled at both the instance and record levels.

9. Make changes to the report by editing the data, formatting, organizing the content, and entering additional data.

   The changes you make to the status report here are saved to the status report in the project workspace but don't get saved to the underlying status report record, which you access from the status report related list in Projects form.

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10. Observe and monitor the report.

    For more information on viewing and analyzing status reports, see Analyze the status report in Project Workspace.

    If you don’t have old status reports, you can't see the import option. For more information on importing existing status report, see Import old project status report to Project Workspace.

Related topics

- Add dynamic content to status report in Project Workspace
- Status reporting in Project Workspace
- Analyze the status report in Project Workspace
- Import old project status report to Project Workspace
- Create a status report template in Project Workspace

Analyze the status report in Project Workspace

Observe a status report in Project Workspace for your project to learn about project health, metrics, risks, issues, and milestones.

Before you begin

Role required: it_pps_admin, it_project_manager

About this task

The following are the headers in a report created using the Default status report template. A report created using the One-page status report template has fewer information headers.

Aspect	Description
Overview	View a high-level summary of the project, including key details such as phase, health, and % completion.
Key Milestones	Track critical project milestones, comparing planned vs actual dates and identifying any variances.
Cost (Planned vs Actual)	Compare planned project costs to actual expenditures over time, helping identify budget deviations.
Resources (Allocated vs Actual)	Analyze planned resource allocation versus actual usage, helping identify resource over/under-utilization.
Schedule	Evaluate the project’s timeline, identifying delays and comparing planned vs actual task completion.
Risks	Assess potential risks, their probability, impact, and current mitigation plans.
Issues	Identify ongoing issues affecting the project, with ownership and target resolution dates.
Dependencies	Assess external or internal factors that could impact the project’s progress or completion.

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You can also compare two reports to compare and analyze the progress.

Procedure

1. Open a project from the planning page of Project Workspace.
   For information on how to navigate to the planning page, see Access the new Project Workspace.
2. Open the Status report page of the project by selecting **Status Reports** from the list.
3. From the Pages section, select the name of the status report you want to view.
4. Observe and monitor the report.

Related topics

- Status reporting in Project Workspace
- Create a status report template in Project Workspace
- Create a status report in Project Workspace
- Update the status report in Project Workspace
- Import old project status report to Project Workspace
- Add dynamic content to status report in Project Workspace

Update the status report in Project Workspace

Create and update the status report for your projects in Project Workspace.

Before you begin

Role required: it_project_manager

Procedure

1. Create a status report in Project Workspace.
   The status report appears with the data and information that you entered populated.
2. **Optional:** Make changes to the report by editing the data, formatting, organizing the content, and entering additional data.

   (Optional) The changes you make to the status report here are saved to the status report in the project workspace but don't get saved to the underlying status report record, which you access from the status report related list in Projects form.
3. Select the **More actions** icon and select **Edit status report** to edit or modify the status report.
4. From the status report window, modify the fields that you want to update and select **Submit**.

Related topics

- Duplicate a status report in Project Workspace
- Import old project status report to Project Workspace
- Add dynamic content to status report in Project Workspace
- Analyze the status report in Project Workspace

Duplicate a status report in Project Workspace

Save time by duplicating an existing status report to copy all the project details without having to copy the information manually in the Project Workspace.

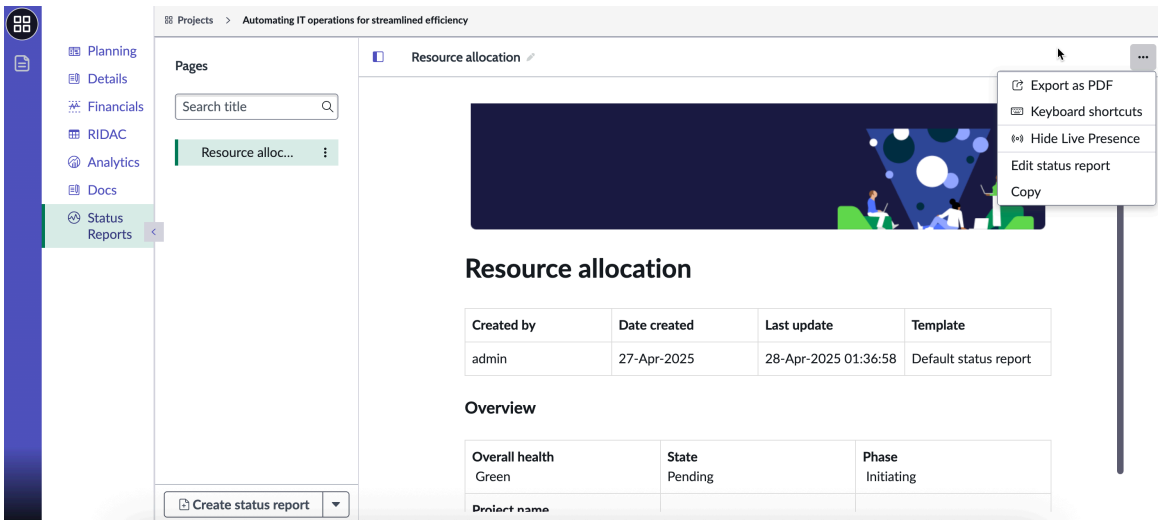
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Before you begin
Role required: it_project_manager

Procedure

1. Create a status report in Project Workspace.
   The status report appears with the data and information that you entered populated.
2. **Optional:** Make changes to the report by editing the data, formatting, organizing the content, and entering additional data.

   (Optional) The changes you make to the status report here are saved to the status report in the project workspace but don't get saved to the underlying status report record, which you access from the status report related list in Projects form.



3. Select the **More actions** icon and select **Copy** to create a copy of status report.
   The new status report is added to the same location as the original status report.

Related topics

- Status reporting in Project Workspace
- Analyze the status report in Project Workspace
- Import old project status report to Project Workspace
- Add dynamic content to status report in Project Workspace
- Create a status report template in Project Workspace

Import old project status report to Project Workspace

Migrate your old status reports from the classic Project Workspace to the new Project Workspace and optimize reporting process of your projects.

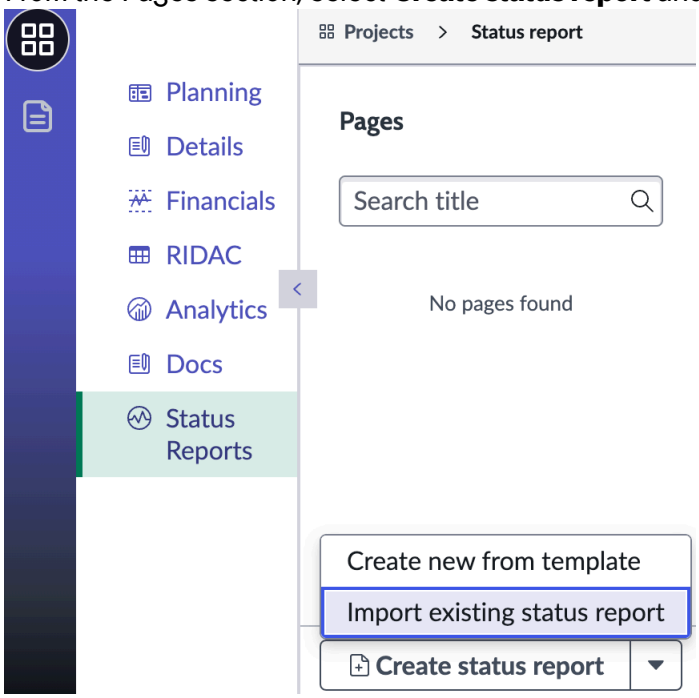
Before you begin
Role required: it_pps_admin, it_project_manager

Procedure

1. Open a project from the planning page of Project Workspace.
   For information on how to navigate to the planning page, see Access the new Project Workspace.
2. Open the Status reports page of the project by selecting Status Reports from the list.

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3. From the Pages section, select **Create status report** and select **Import existing status report**.



   By default, the create status report and create new from template options are visible, while the import existing status report option appears only if an old status report exists.

4. Select **Import** to import old status report to new reporting tool.

   You can export a status report at the project level from the classic Project Workspace using the **Export status reports to Next Experience** link. You can export a status report at the record level using the **Export to Next Experience** link.

Related topics

- Add dynamic content to status report in Project Workspace
- Create a status report template in Project Workspace
- Update the status report in Project Workspace
- Analyze the status report in Project Workspace
- Duplicate a status report in Project Workspace

Add dynamic content to status report in Project Workspace

Add dynamic content to a status report in Project Workspace for your projects. The dynamic content gets updated automatically in the status report as a change is made to the record.

Before you begin

Role required: it_pps_admin, it_project_manager

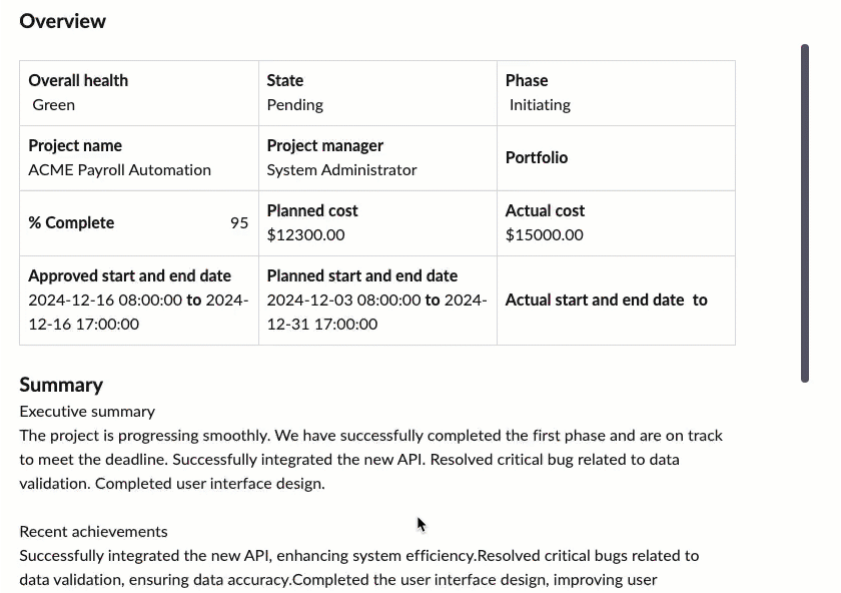
Procedure

1. Open a project from the planning page of Project Workspace.
   For information on how to navigate to the planning page, see Access the new Project Workspace.
2. Open the Docs template page of the project by selecting **Docs template** from the list.
3. From **Docs template** page, select the template to open it.

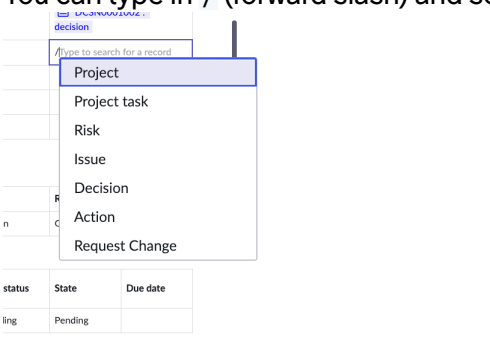
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4. Select **Doc** tab and click at the appropriate place and then type / (forward slash) to open a list of actions, including **Mention a user** or **Mention a record** or **Insert dynamic content** as required.

   a. You can type in / (forward slash) and select **Mention a user** to tag a user.

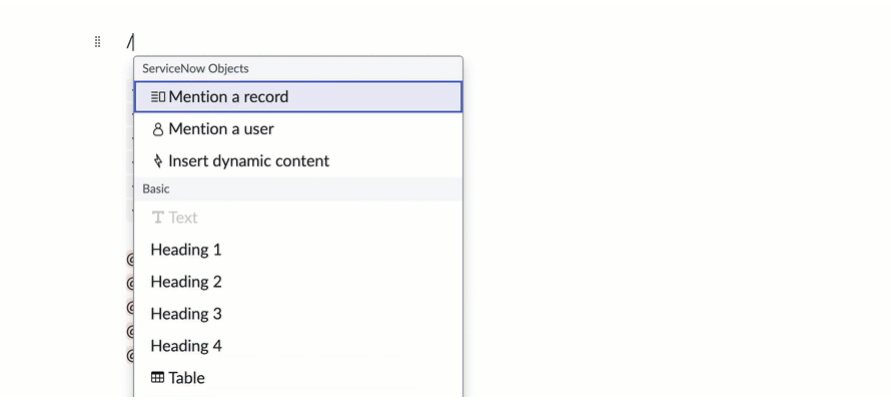


   b. You can type in / (forward slash) and select **Mention a record** to insert a record.



   Once you insert a record, it is embedded as a link, which you can click to open the related record and see its details.

   c. You can type in / (forward slash) and select **Insert a dynamic content** to add insert dynamic content in the status report.



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Using insert dynamic content option, you can configure and view the status date, project, and other dynamic data in your status report template. This option is only available if **Is dynamic** field is selected in the Doc template form. You can select formatting options such headings, bullets, and others.

5. Observe and monitor the report.

   For more information on viewing and analyzing status reports, see Analyze the status report in Project Workspace.

Related topics

Status reporting in Project Workspace

Create a status report template in Project Workspace

Create a status report in Project Workspace

Analyze the status report in Project Workspace

Duplicate a status report in Project Workspace

Import old project status report to Project Workspace

Collaborate with stakeholders from Project Workspace

Add comments and attachments to the project or a project task and share them with other users of your organization. Collaborate and ensure that your project is in line with your organizational priorities.

Before you begin

Role required: it_project_manager

About this task

Browse and upload files from your computer. Add comments and tag stakeholders for their feedback or notes.

Procedure

1. Open a project from the planning page of Project Workspace.
   For information on how to navigate to the planning page, see Access the new Project Workspace.
2. Attach files to your project or project task.
3. Add comments or tag stakeholders to draw their attention to an attachment or information about the project.
   You can add comments directly at the project level or for a project task.

Collaborate on projects using Docs

Collaborate with team members, save notes, create project charters, and project briefs using Docs.

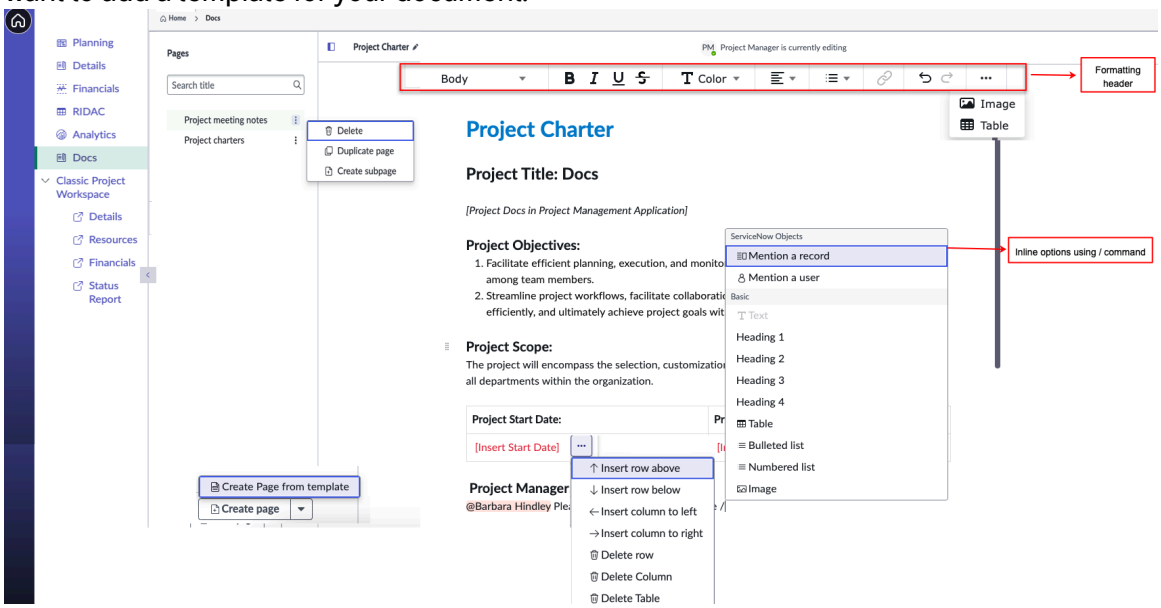
Before you begin

Role required: it_project_user

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Procedure

1. Open a project in Project Workspace.
   For more information, see Access the new Project Workspace.
2. Open the docs page of the project by selecting **Docs** from the list.
3. From the Pages section, select **Create page** and then select **Create Page from template** if you want to add a template for your document.



4. You can perform these tasks under the **Docs** page:
   - Use the forward slash on the keyboard to open a list of actions, including **Mention a user** or **Mention a record** as required.
   - Use the feature of live presence to see who is opening or working on a Doc.
   - Create templates for documents such as project charters, project briefs, and meeting notes.
   - Add meeting notes to record discussions, decisions, action items, and any relevant information discussed during meetings.
   - Store information related to your tasks, add images, or tables and collaborate in real-time using Docs.
   - Select the more actions menu to delete, duplicate, or create child pages in the pages section.
   - Apply rich text paragraph formatting, which includes headings, lists, alignment, and other styling options.

Generate the summary for selected or complete content with Project doc summarization skill in Project Workspace

Quickly learn the details of the documents from the summary that is generated by Now Assist in Strategic Planning.

https://player.vimeo.com/video/1038147968?h=9451c75819&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

Role required: it_project_user

Ensure that the Now Assist skill is activated.

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About this task

Minimize the time that you spend reading documents, meeting notes, project reports and so on by using a summary that is generated by Now Assist. You can also copy-and-paste the source materials that meet your learning needs in Docs and generate a quick summary.

Procedure

1. Navigate to **Workspaces** > **Project Workspace** and open the required project.
2. From the Docs, perform one of these action according to your requirements.

   Note:
   Summarization of the entire content is also permitted for users with the read role.

3. **Optional:** When you're finished summarizing the page in Docs, you can provide feedback, copy, or view information about it.

   Note:
   Because the information in these fields is AI generated, it's a good idea to review the text and make sure it's accurate.

   Only an administrator can activate the Now Assist skills. For more information, see Configure Now Assist for Strategic Portfolio Management (SPM).

   The Project doc summarization skill checks the doc content to determine if enough information is available to generate a summary. If there isn't enough content to summarize, you can add more content and retry.

   Note:
   The **Summarize** button is visible only if the Project doc summarization skill is active. If the selected text exceeds the token limit for Now Assist, the Project doc summarization skill can't be executed. If there is more content to summarize, you can remove some content and retry.

Schedule the project summary emails with Email project summary skill

Schedule the project summary emails to prioritize and track the most important changes in the project in Project Workspace.

https://player.vimeo.com/video/1039117096?badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

Ensure that the Email project summary skill is active.

Role required: it_project_manager

About this task

By using the Email project summary skill, you can generate a concise project summary. The project summary is shared through email. Project managers can monitor key elements such as milestones, resource assignments, projects, and project tasks. They can also prioritize their projects and decide the cadence of receiving these project summary emails.

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Procedure

1. Navigate to **Workspaces** > **Project Workspace** and open any project.
2. From the planning page, select the more actions icon (···) and then select **Email project summary**.
3. From the Email project summary modal, select the **Cadence** as Weekly, Bi-weekly, or Monthly according to your requirement.
4. Select **On this day**, as days for weekly or bi-weekly or dates for monthly cadence.

   Note:
   The email ID of the project manager is required before you can send the summary over the email.

   You can disable email summary by selecting **Disable email summary** check box.

5. Select **Users** from the list.
   - The project manager is automatically set as the default email recipient for the project.
   - You can select one or multiple users. Only users with sn_ppm_read role or have read or view access to project information appear for selection in the users list.
   - When an email is sent to recipients, the project manager is placed in the To list, while all other recipients are included in the Cc list.
   - For confidential projects, recipients are required to be included in the list of users authorized to view the project.
6. Select the **Include critical path task changes** to enable project task monitor AI agent directly from email project summary modal.
   You can receive notifications when changes to critical path tasks may delay your project timelines. These AI-driven alerts help you take action before risks escalate.
7. Select **Schedule** to schedule the email cadence for the project.

   Note:
   Because the information in these fields is AI generated, it's a good idea to review the text and make sure it's accurate.

   The Email project summary skill captures different snapshots of your project at different times. For example, if you choose a weekly schedule, the skill captures a snapshot of the project this week and then another one next week. These snapshots are saved in the back end. The Now LLM Service then compares the two snapshots and highlight the important changes you must focus on (like a delay in a milestone or an increased budget). The skill then creates a summary of these key updates and sends an email to the project manager with links to project records. The project summary keeps the project managers informed on important updates without having to review changes manually.

8. **Optional:** Select **Schedule and send** to schedule and send instant summary for the project. When you select Schedule and send, you receive a project summary instantly and also receive summaries based on the selected cadence. The email would go to the recipients selected along with the Project Manager.

Example: Schedule a project summary mail

Let's assume that you have selected a weekly cadence and chosen Monday (which falls on 2025-07-07). After adding recipients, you have selected the Critical Path Task Changes check box to enable the Project Task Monitor AI agent.

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- If you select Schedule, the project summary is emailed to you and the recipients weekly on Mondays, starting from 2025-07-07 and continuing until the project becomes inactive.
- If you select Schedule and send, you will receive an initial summary email immediately and will also receive summaries according to the selected cadence and day.

Related topics

Configure the Monitor project tasks agentic workflow in AI Agent Studio

Project financials and Source-to-Pay Operations integration

Request, track, and manage procurement requests of assets for your projects.

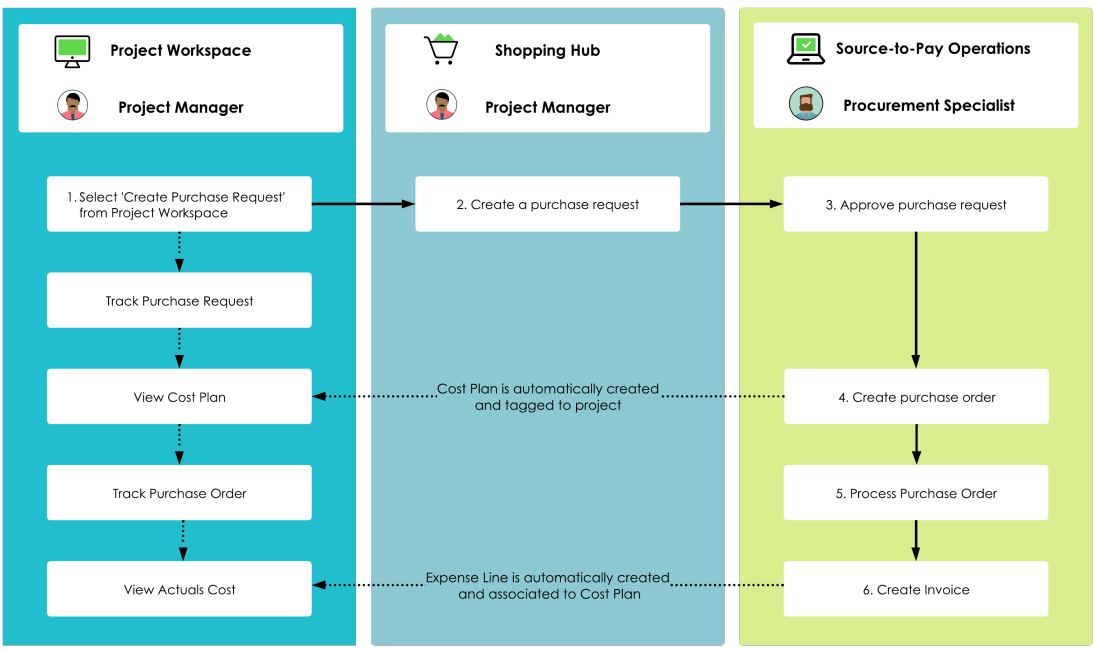
Before you begin

Install Sourcing and Procurement Operations

Role required: it_project_manager

About this task

Project managers can navigate from Project Workspace to procurement applications and create purchase requests for their projects. The ordered purchase requests are reflected in the Project Workspace. After the purchase request is processed, the purchase line, cost plan, and expense lines are automatically generated. For more information about the integration, see Sourcing and Procurement Operations integration with Project Management.



Procedure

1. Navigate to **Workspaces** > **Project Workspace**.
2. Open a project and select **Details** from the left menu.

Create purchase request

As a Project Manager, you can directly access the Source-to-Pay Operations shopping hub portal to place a request to meet your project requirements.

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Before you begin
Role required: it_project_manager

Procedure

1. In the project details page, select More Actions ( ) icon and select **Create Purchase Requests**.
   The Source-to-Pay Operations shopping hub portal opens in a new tab.
2. Place the request for an asset.
   For more details on how to request a product using Source-to-Pay Common Architecture, see Order a product with quick checkout .

Note:
While placing the request for the asset, enter the project number in the **What project is this request for?** field.

Track purchase line and purchase order lines

After the purchase request is placed, you can track the request details such as Purchase line number, Purchased quantity, unit cost, tax, and state from Project Workspace.

Before you begin
Role required: it_project_manager

Procedure

1. Open the project selected while creating the purchase request.
2. Select **Details** from the left menu.
3. Select the **Purchase Lines** related list.
   A procurement specialist from the Source-to-Pay Operations approves the purchase requisition. Once the purchase order is created, purchase order line is automatically created in Project Workspace.

   To view the purchase order in Project Workspace:

   a. Open the project selected while creating the purchase request.

   b. Select **Details** from the left menu.

   c. In the Details page, select the **Purchase Order Line** related list.

Note:
Every purchase order line creates a cost plan in the selected project.

Tracking financials of procurement requests

Once the requested purchase orders are approved and processed, a purchase order line and a cost plan is automatically created. You can view cost plans for the requisition in Project Workspace.

Before you begin
Role required: it_project_manager

Procedure

1. Open the project selected while creating the purchase request.
2. Select **Details** from the left menu.

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3. Select the **Cost Plans** related list.

> **Note:**
> The cost plan is reflected in Financials along with additional details such as start and end fiscal period, planned cost plan breakdown for each fiscal period.

As next steps, a purchase order is processed and an invoice is generated. An invoice line is created which captures the actual expense of the purchase request. You can view the expense lines generated from the processed invoice from Project Workspace.

a. Open the project selected while creating the purchase request.

b. Select **Financials** from the left menu.

c. Locate the cost plan created for the Purchase Order Line.

d. Scroll through the cost plan monthly breakdown, select the row options for fiscal period in which the purchase order is created and select **View expense lines**.

e. In the Expense lines view, select the **Auto generated expense line for cost plan:** option.

f. Total expense incurred while generating the purchase order are displayed in the **Amount** field.

Result

The processed purchase request is tagged to the selected project. Financials records such as cost plans and expense lines are automatically created and associated with the project expense.

Add a RIDAC record to a project in Project Workspace

Add a Risk, Issue, Decision, Action, or Request Change (RIDAC) record to your project in the Project Workspace. Adding RIDAC records enable you to keep a track of risks or issues during the project life cycle and help in analyzing the outcome of a project.

Before you begin

Role required: it_project_manager

About this task

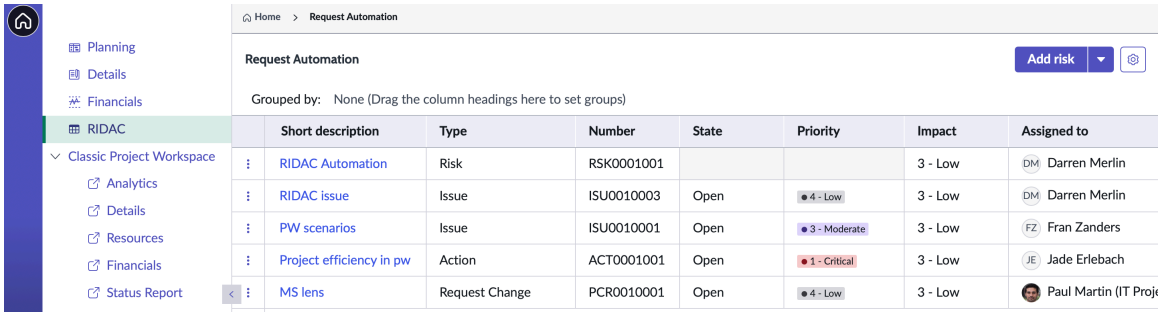
You can select the type of record you want to create, fill in the required details, and associate it to your project. You can use the RIDAC page in Project Workspace to view, add, manage, and evaluate all the RIDAC records.

For information about RIDAC records for project management, see RIDAC records for a project in Project Workspace.

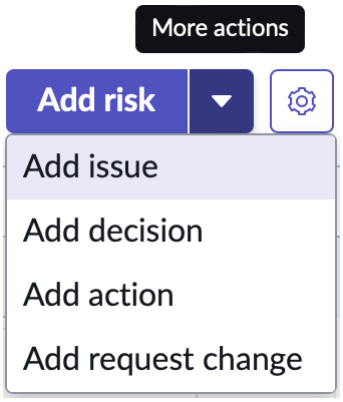
Procedure

1. Open a project from the planning page of Project Workspace.
   For information on how to navigate to the planning page, see Access the new Project Workspace.
2. Open the RIDAC page of the project by selecting **RIDAC** from the list.

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3. From the More actions menu, select the type of RIDAC record that you want to create.



4. On the form, fill in the fields.
   For field information, see:
   - Risk form of Project Workspace
   - Issue form on Project Workspace
   - Action form of Project Workspace
   - Decision form on Project Workspace
   - Request change form on Project Workspace
5. Select **Submit**.

What to do next

- Convert an existing project risk to an issue, decision, action, or request change and close the risk. For more information, see Convert one RIDAC record to another for a project in Project Workspace.
- Associate a project risk with existing issues so that you can track dependencies and recognize trends for the future. For more information, see Associate existing RIDAC records for a project in Project Workspace.

Associate existing RIDAC records for a project in Project Workspace

Link existing RIDAC records to one another for your project in Project Workspace. A RIDAC record stands for Risks, Issues, Actions, Decisions, and Request Changes. Keep a record of risks or issues and their outcome for analysis at project closure and planning.

Before you begin

Role required: it_project_manager

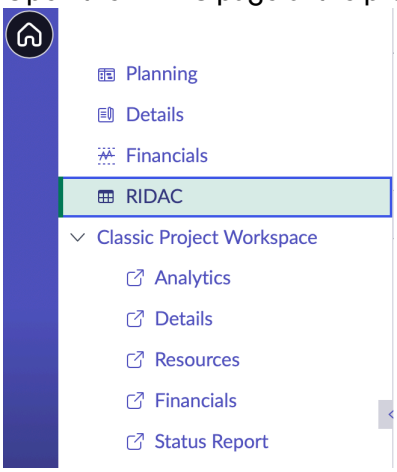
About this task

You can associate one record with multiple different records. For example, you can link one issue record to multiple risk, decision, action, or request change records.

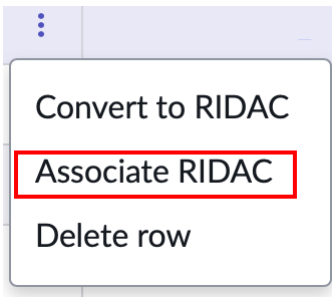
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Procedure

1. Select the project for which you want to associate one RIDAC entry to another.
   For information on how to navigate to a Project in the Project Workspace, see Access the new Project Workspace.
2. Open the RIDAC page of the project by selecting **RIDAC** from the list.



3. On the Project form, select **Row context menu** for an individual risk, issue, decision, action, or request change record.
4. Select **Associate RIDAC**.



5. On the Associate dialog box, from the Select type list, select the RIDAC record to which you want to associate the selected record.
   For example, if you wanted to associate an issue to a decision, you would select **Decision**.
6. From the Associate to list, select the record number to which you want to associate the selected record.
   For example, if you wanted to associate the selected issue to a decision (DCSN0001005), you would select **DCSN0001005**.
7. Click **OK**.

Convert one RIDAC record to another for a project in Project Workspace

Convert one RIDAC (Risk, Issue, Decision, Action, and Request Change) record to another for a project in the Project Workspace. Keep a record of risks or issues and their outcome for analysis at project closure and planning. Track the risks and issues throughout the project life cycle.

Before you begin

Role required: it_project_manager

About this task

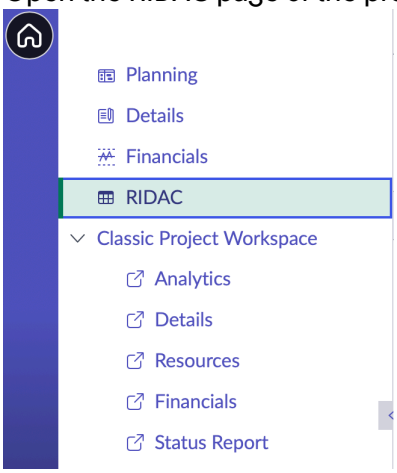
When you convert a RIDAC record to another record, the values for the **Short description**, **Requester**, and **Assigned to** fields are carried forward from the parent record.

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You can also specify to close the parent record on creation of the new record instead of manually closing the parent record.

Procedure

1. Select the project for which you want to convert one RIDAC entry to another.
   For information on how to navigate to a Project in the Project Workspace, see Access the new Project Workspace.
2. Open the RIDAC page of the project by selecting **RIDAC** from the list.



3. On the Project form, select **Row context menu** for an individual risk, issue, decision, action, or request change record.
4. Select **Convert to RIDAC**.



5. On the Convert dialog box, from the Select task type list, select the RIDAC record to which you want to convert the selected record.
   For example, if you wanted to convert an issue to decision, you would select **Decision**.
6. Modify the text in the **Short description** field, which is copied from the parent record.
7. **Optional:** Change the default assignment copied from the parent record in the **Assigned to** field by clicking the lookup icon ( ) and selecting a different user.
8. **Optional:** If you want to close the parent RIDAC record on creation of a new record, select the close parent record option.
   The label of the close parent record option changes depending on the parent record type. For example, if the parent record is an issue and you're converting it to decision record, then the close record option would appear as **Close Issue**.
9. Click **OK**.

Export a project status report to Microsoft PowerPoint from Project Workspace

Generate a status report of your project and export it as a Microsoft PowerPoint file from Project Workspace. You can use this file to present the project status to stakeholders or to collaborate

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with them over risks and next steps. Save time by generating a Microsoft PowerPoint file with the latest information and avoid copying information into slides.

Before you begin

- Install the Export to PowerPoint for Strategic Portfolio Management application from ServiceNow store. For more information, see Install Export to PowerPoint for Strategic Portfolio Management.
- Create and upload a Microsoft PowerPoint template to apply to your status report. For more information on how to create and upload a template, see Create a Microsoft PowerPoint template and Upload your Microsoft PowerPoint template respectively.

Role required: it_project_manager

Important:
Export to PowerPoint is currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. Please check for availability updates in future releases.

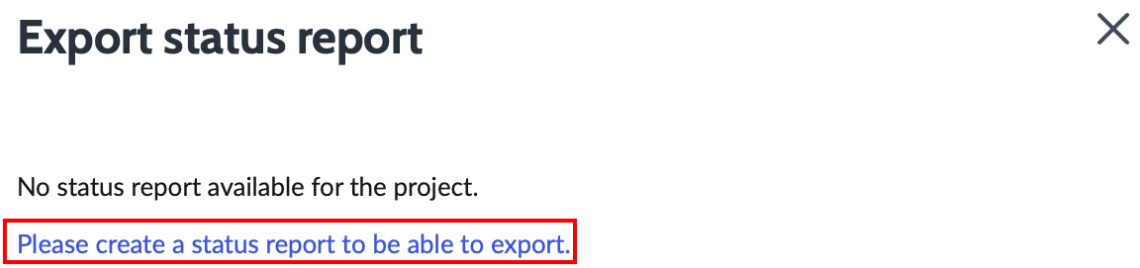
About this task

Create a status report or use an existing status report to download it as a Microsoft PowerPoint file.

Exporting the project is beneficial if your stakeholders prefer a slide deck rather than using a dashboard. It also helps the wider audience or external stakeholders who don't have access to the dashboards but are waiting for an update.

Procedure

1. Open a project from the planning page of Project Workspace.
   For information on how to navigate to the planning page, see Access the new Project Workspace.
2. From the More actions menu ( ), select **Export status report**.
3. On the Export status report form, fill in the fields for an existing project.
   For field information, see Export status report form on Project Workspace.
4. Select **Export**.
5. When prompted, select the desired location, and save the file.
6. **Optional:** On the Export status report form, create a status report for a project by clicking the **Please create a status report to be able to export** link.



7. On the **Status Report** Tab, create a status report by clicking **Create New**.
8. On the Status Report form, fill in the fields.
   For field information, see Create a project status report.
9. Select **Submit**.
10. Click the Export to PowerPoint icon ( ).

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11. From the Export to PowerPoint window, select the report date by clicking **Status report date**.
12. From the Export to PowerPoint window, select a template by clicking **Select a template**.
13. Click **Export**.

Result
The project status report is downloaded as a Microsoft PowerPoint file with the project number and status report date as the file name.

Export a project from Project Workspace

Export your project as a file from Project Workspace. Use this file to provide project updates to external stakeholders or a wider audience. Save time by generating an export file with the latest information and avoid copying information into different files.

Before you begin
For Microsoft PowerPoint:

- Install the Export to PowerPoint for Strategic Portfolio Management application from the ServiceNow store. For more information, see Install Export to PowerPoint for Strategic Portfolio Management.
- Create and upload a Microsoft PowerPoint template to apply to your status report. For more information on how to create and upload a template, see Create a Microsoft PowerPoint template and Upload your Microsoft PowerPoint template.

Important:
Export to PowerPoint is currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. Please check for availability updates in future releases.

Role required: it_project_manager

About this task
Create a project or use an existing project to download it in the required file format. You can choose to export the project data in Excel, CSV, PPT, MS Project (MPP), and XML file format.

Exporting the project is beneficial if your stakeholders prefer a file rather than using a dashboard. It also helps the wider audience or external stakeholders who don't have access to the dashboards but are waiting for an update.

Procedure
1. Open a project from the planning page of Project Workspace.
   For information on how to navigate to the planning page, see Access the new Project Workspace.
2. From the More actions menu ( ), select **Export project**.
3. Select the file format and then select a template if needed.
4. Select **Export**.
   Only the columns that are visible in the Planning page of the project are exported.

Result
The project is downloaded in the selected file format.

Closing a project in Project Workspace

End the project when all tasks are completed. When you close a project, all project tasks, sub-projects, and resource assignments associated with the project are closed automatically.

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Before you begin
Role required: it_project_manager

About this task
Ideally, you should not reopen a project after it is closed. Updating the project state from Closed to Work In Progress, Pending, or Open is not allowed. If you still need to reopen a closed project, reopen an existing project task or add a new task to the project. This action for a task moves the project from Closed to Work in Progress state without affecting the other closed tasks. You can cancel the associated future resource plans and complete the allocated resource plans for a closed project.

Procedure
1. Open a project from the planning page of Project Workspace.
   For information on how to navigate to the planning page, see Access the new Project Workspace.
2. Verify that your work is completed for all the tasks in the project you want to close.
3. On the Project form, change the state field to one of the closed states:
   - Closed complete
   - Closed Incomplete
   - Closed skipped

   Note:
   - When you close a project, a notification is displayed, which enables you to view all resource assignments associated with the project. You can synchronize all resource assignment dates with project dates. The resource assignment ends on the exact date and time that the project ends.
   - You can track, modify, and synchronize all resource assignments for a project from the Resource Assignment List page.

   Alternatively, close every project task first, starting with the lowest-level child tasks. The closed states roll up to parent tasks, and when all highest-level parent tasks are closed, the project state changes to closed. However, the default closed states for parent tasks and for the project is **Closed Complete**. Therefore, even if you change any or all project tasks to **Closed Incomplete** or **Closed Skipped**, the project state is changed to **Closed Complete**.

   Also, change the **Phase** value to **Closing**. The project phase is for reference only and isn't linked to or dependent on the **State** field.

   If your project contains sub-projects, you can close the sub-project without affecting the parent project. Change the **State** of the sub-project to any closed state to close the sub-project. Closing the sub-project closes or changes the state of all the tasks associated with the sub-project. Also, changing the state of the sub-project to Work in Progress, moves all the associated tasks to Work in Progress state.

   If there are project tasks associated with the parent project that are not closed, the parent project remains in the Open, Work in Progress, or Pending state. If the tasks associated with the parent project are closed, the state of the parent project also changes to **Closed Complete**.

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4. After the project is complete, create a final baseline to see how closely the project's actual values came to the estimated values.

> **Note:**
> Baselines compare only planned start and end date values with actual start and end date values. Use reports to compare the effort and cost.

Result
For projects created from an incident, problem, or change, updating the project state does not automatically update the related incident, problem, or change request record. You must update the related record manually. For example, if the completion of a project also means that a related Change can be closed, go to the Change record and modify its **State** field. It is also a good idea to update the work notes field on the related record to include any relevant information about the project.

Related topics

Export a project from Project Workspace

Add a RIDAC record to a project in Project Workspace

Managing financials for your projects

Manage budget, cost plans as forecasts, actual expenses as expense lines, generate labor costs, create financial baselines, and view, analyze, and compare the financial performance of your projects at required cadence in Project Workspace.

The comprehensive financials view helps you to understand planned and actual costs, Forecast (previously EAC - Estimate At Completion), Remaining Estimates (previously ETC - Estimate To Completion), Actual (previously Actuals to date), and so on, for the selected item. You can manage cost plans and associate the expense lines and process them to reflect the actuals for a planning item.

Export the financials data from Costs and benefits or Baseline comparison view as Microsoft Excel or a CSV file and share it with your stakeholders to review the financial performance of your projects and portfolio.

Cost view

Forecast your planned costs, create and manage cost plans and expense lines to track the financial performance of your projects, review the latest costs and actuals.

In the Cost screen, you can:

- As a Project Manager, you have the enhanced visibility and ability to manage the financial data across multiple project levels. Cost view of financials shows cost plans and expense lines from sub-projects, allowing you to track the finances.
- The parent project widgets display the consolidated values of forecasted costs and expenses.
- Identify and manage costs using the **Project/Demand** column for any sub project or demand directly from Cost view of the parent planning item.
- Re-forecast all the cost plan values for future fiscal periods by double-clicking to edit the value in the least time scale view, either by month or by period.
- Manage cost plans for your projects. For more information, see Add, edit, or delete cost plans.
- Add or edit expense lines for your projects to record any planned or unplanned expenses. For more information, see Add or edit expense lines.
- Generate labor costs for the fiscal period. For more information, see Generate labor costs.

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- Create and compare baselines to capture the financial snapshot of your projects. For more information, see Create and compare financial baselines for your projects.
- Configure widgets to get a high-level overview of the financial data for your planning item.
- All financial details from sub-projects will be aggregated and displayed in the parent project's cost plans and widgets.

Tip:
Cost view gives you enhanced user experience to customize the left pane columns by using the personalize icon () and by saving user preferences to retain the customizations made to hide, view, or adjust columns, time scope viewing, and so on.

In the Cost screen, you can:

- As a Project Manager, you have the enhanced visibility and ability to manage the financial data across multiple project levels. Cost view of financials shows cost plans and expense lines from sub-projects, allowing you to track the finances.
- The parent project widgets display the consolidated values of forecasted costs and expenses.
- Identify and manage costs using the **Project/Demand** column for any sub project or demand directly from Cost view of the parent planning item.
- Re-forecast all the cost plan values for future fiscal periods by double-clicking to edit the value in the least time scale view, either by month or by period.
- Manage cost plans for your planning items. For more information, see Add, edit, or delete cost plans.
- Add or edit expense lines for your planning items to record any planned or unplanned expenses. For more information, see Add or edit expense lines.
- Generate labor costs based on the resource assignments. For more information, see Generate labor costs.
- Create and compare baselines to capture the financial snapshot of your planning items. For more information, see Create and compare financial baselines for your planning items.
- Configure widgets to get a high-level overview of the financial data for your planning item.
- All financial details from sub-projects will be aggregated and displayed in the parent project's cost plans and widgets.

Tip:
Cost view gives you enhanced user experience to customize the left pane columns by using the personalize icon () and by saving user preferences to retain the customizations made to hide, view, or adjust columns, time scope viewing, and so on.

Multicurrency

Multicurrency feature enables you to manage financials of your planning items in two different currencies, Functional currency and Investment currency. Functional currency is typically defined by the admin based as the primary currency which is used for planning, budgeting, and tracking the financials of your planning items.

Financial users can now perform the following financial activities in Investment currency.

- Ability to select the Investment currency.
- Track the planned and actual expenses.

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- Allocate and manage the budget.
- View simple financials data.

Using this feature, you can work on financial reporting at global level and see the real-time currency conversions of your financial records.

Organizations operation at global or multinational level, the work is planned and financed at one location and executed at a different location. Each might use a different currency from what was used in the planning phase, multicurrency makes it easy to manage and track your planning items using any currency.

You can monitor and track the financials in one currency, and capture the costs in a different currency.

Using multicurrency, you can see all the costs in the currency you choose for the planning item, instead of restricting to use Functional currency defined in your locale. For more information on how to choose investment currency of your planning items, see Configure multicurrency for projects.

Financial records and widgets will display the costs based on the currency selection.

Note:
Once a cost plan, benefit plan or expense line or an investment budget gets created, you will not be able to change investment currency. You can change the investment currency as long as there are no financial records captured against the planning item.

Display modes

On the financials page for a planning item in Project Workspace, you have Display Mode drop-down switch between different modes to view different formats of financial information of your planning items. These views provide the relevant and focused information which helps project managers and funding users to work on the financial planning.

- Forecast
- Budget vs forecast
- Planned vs actual
- Planned

Users with financial funding role [it_portfolio_manager] will see Budget allocation option instead of the Budget vs forecast.

Display modes value

Mode	Value
Forecast	View Actuals, Remaining estimates, and Forecast for the entire scope of the planning items. Use the time scale to view the actuals for the past fiscal periods and planned costs for the current and future fiscal periods.
Budget vs forecast	View the Budget, Actuals, and Variance for the fiscal periods and Forecast values for the entire scope of the planning items.

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Display modes value (continued)

Mode	Value
	Using this mode, you can: • Compare the latest forecasts with the approved budget at different time scales. • View the budget vs actual for past fiscal periods and budget vs planned for current and future fiscal periods at fiscal period level.
Budget allocation (funding role)	View the Budget, Actuals, and Variance for the fiscal periods and Forecast values for the entire scope of the planning items. Using this mode, funding users can: • View the latest forecast and enter the budget that can they be approved to the work item. • Analyze the variance for the past fiscal periods and work on budget allocation for future fiscal periods. • Compare latest forecast with approved budget and revise the budget, if required.
Planned vs actual	Compare the planned costs with actual expense for the past and current fiscal periods, and view planned costs for the future fiscal periods.
Planned	View only planned costs for the full range and manage the planned costs using the inline editing feature.

Note:

- If you do not see the Budget allocation or Budget vs forecast display options, enable the budget allocation property and configure the budget attribute at instance level.
- To work on budget allocation using the Next Experience, Activate a scheduled job to migrate budget of your planning items.

The last selected view is saved as user preferences.

Default display mode and access level for financial users

User role	Default mode	Role-level access
it_portfolio_manager	Budget Allocation	Allocate and approve budget, manage cost plans and expenses lines.
it_project_manager	Forecast	Manage cost plans and expense lines.
business_stakeholder	Forecast	View financial data.

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Baseline view

Create a baseline to capture a snapshot of the financial changes for your projects. You can create on-demand baselines or at a cadence using a scheduler job.

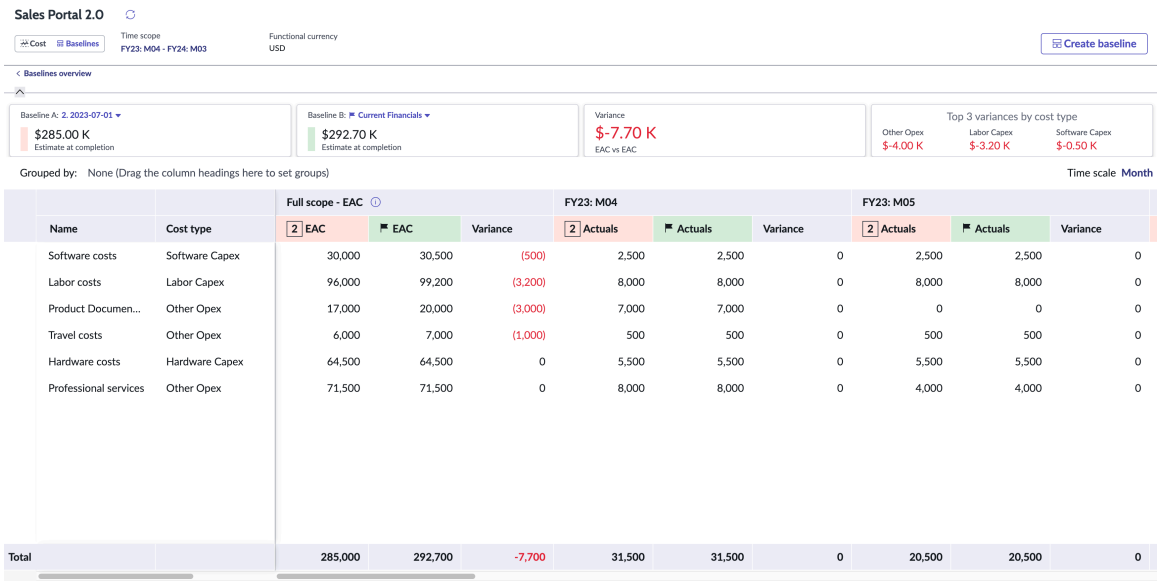
Note:
Baselines created on the parent project includes the cost plans and expense lines from all of the child projects to calculate and give you a better breakdown of the financial performance of the projects and sub-projects.

When you create a financial baseline for a parent project, the financial records of the child project are also calculated, which helps Project Managers to track the financial health of the projects at one place.

Compare baselines to compare the difference in costs between latest status against a baseline or between any two baselines.

Note:
Each baseline is tagged with a number based on the order that they're created. The Current Financials baseline captures the financials details in real-time and is always represented with a flag icon (⚑).

The baselines comparison view helps you to understand the variances between the two baselines.



		Full scope - EAC			FY23: M04			FY23: M05		
Name	Cost type	2 EAC	EAC	Variance	2 Actuals	Actuals	Variance	2 Actuals	Actuals	Variance
Software costs	Software Capex	30,000	30,500	(500)	2,500	2,500	0	2,500	2,500	0
Labor costs	Labor Capex	96,000	99,200	(3,200)	8,000	8,000	0	8,000	8,000	0
Product Documen...	Other Opex	17,000	20,000	(3,000)	7,000	7,000	0	0	0	0
Travel costs	Other Opex	6,000	7,000	(1,000)	500	500	0	500	500	0
Hardware costs	Hardware Capex	64,500	64,500	0	5,500	5,500	0	5,500	5,500	0
Professional services	Other Opex	71,500	71,500	0	8,000	8,000	0	4,000	4,000	0
Total		285,000	292,700	-7,700	31,500	31,500	0	20,500	20,500	0

Use the widgets when you compare baselines to view:

- Two dedicated widgets for each baseline displaying the EAC.
- Third widget displays the total variance between the EAC values of the selected baselines.
- Fourth widget displays the top three variances contributing to the overall variance by cost type.

The widgets and the header rows are color-coded to help you identify the selected baselines.

Tip:
Switch between different baselines from the comparison view by selecting the name of a baseline from one of the widgets.

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When you compare baselines, you get the list of cost plans with their associated costs types, EAC at full scope, and a breakdown view of actual expenses and planned costs.

By default, the time scale of the breakdown view is set to Month.

- Use the **Time scale** option to view the comparison breakdown view at monthly, quarter, and yearly levels.
- Select **Time scope** to filter fiscal periods, data in the widgets, and the comparison table.

The widgets and the header rows are color-coded to help you identify the selected baselines.

Tip:
Select the name of a baseline from the first or second widget to compare different baselines.

Let's take an example of the comparison view of two baselines: 2023-10-01, Baseline A, and Current Financials, Baseline B.

Example: How actuals, planned, and EAC are compared between two baselines captured at different timestamps

For a selected baseline, based on the creation date, the table shows Actuals values for the past fiscal periods from the created date and Planned values for the current and future fiscal periods.

Consider a planning item scoped from July 2023 to June 2024. Baseline A is created on 2023-10-01. If you compare the Current Financials baseline in December 2023 to the baseline captured in October 2023:

1. The baseline comparison view show Actuals vs Actuals columns from July 2023 to September 2023.

			FY23: M07			FY23: M08			FY23: M09		
	Name	Cost type	2 Actuals	Actuals	Variance	2 Actuals	Actuals	Variance	2 Actuals	Actuals	Variance
	Professional services	External labor Capex	3,500	3,500	0	3,500	3,500	0	4,700	4,700	0
	Travel costs	Other Opex	800	800	0	450	450	0	0	6,000	(6,000)
	Labor costs	Labor Capex	9,800	9,800	0	9,800	9,800	0	9,800	9,800	0
	Software costs	Software Capex	0	0	0	3,000	3,000	0	3,000	3,000	0
	Hardware costs	Hardware Capex	4,000	4,000	0	4,000	4,000	0	4,000	4,000	0
	other costs	Other Capex									
	Server costs	Hardware Capex									
Total			18,100	18,100	0	20,750	20,750	0	21,500	27,500	-6,000

2. Planned vs Actuals for October 2023 and November 2023.

			FY23: M10			FY23: M11		
	Name	Cost type	2 Planned	Actuals	Variance	2 Planned	Actuals	Variance
	Professional servi...	External labor Capex	3,000	3,000	0	3,000	4,000	(1,000)
	Travel costs	Other Opex	450	500	(50)	450	600	(150)
	Labor costs	Labor Capex	9,800	9,800	0	9,800	9,800	0
	Software costs	Software Capex	3,000	3,500	(500)	3,000	3,000	0
	Hardware costs	Hardware Capex	4,000	4,000	0	4,000	4,000	0
	other costs	Other Capex		0	0		0	0
	Server costs	Hardware Capex					1,200	(1,200)
Total			20,250	20,800	-550	20,250	22,600	-2,350

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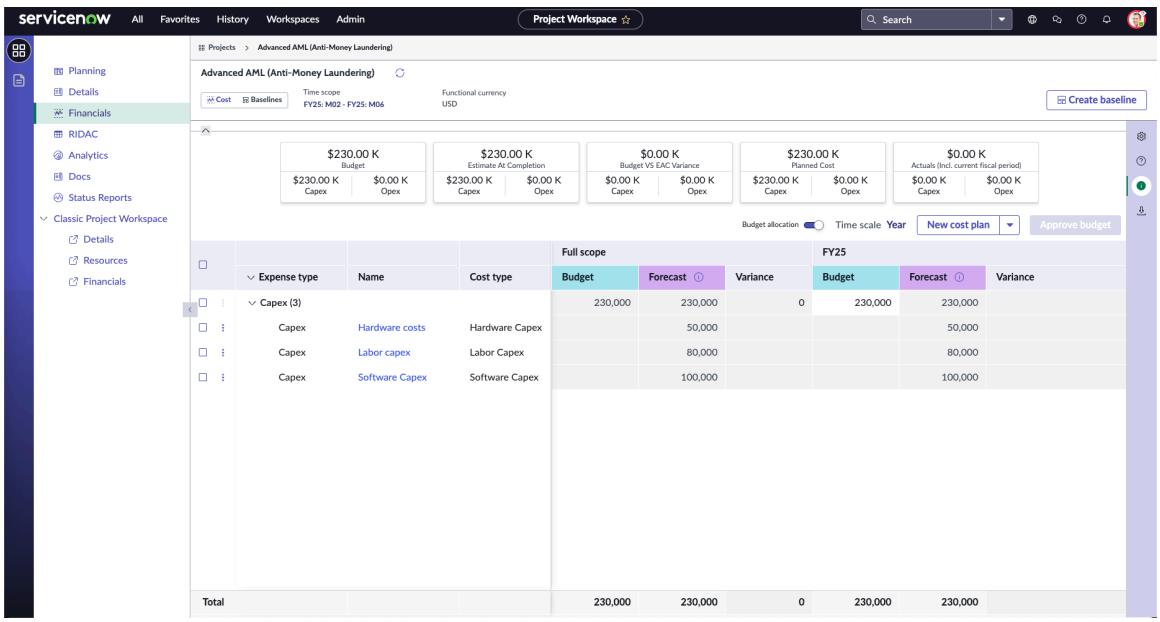
3. Planned vs Planned from December 2023 to June 2024.

		FY23: M12			FY24: M01			FY24: M02			FY24: M03		
Name	Cost type	2 Planned	Planned	Variance	2 Planned	Planned	Variance	2 Planned	Planned	Variance	2 Planned	Planned	Variance
Professional servi...	External labor Capex	3,000	3,000	0	3,000	3,000	0	3,000	3,000	0	3,000	3,000	0
Travel costs	Other Opex	450	450	0	450	450	0	450	450	0	450	450	0
Labor costs	Labor Capex	9,800	9,800	0	9,800	9,800	0	9,800	9,800	0	9,800	9,800	0
Software costs	Software Capex	3,000	3,000	0	3,000	4,000	(1,000)	3,000	4,000	(1,000)	3,000	4,000	(1,000)
Hardware costs	Hardware Capex	4,000	4,000	0	4,000	5,000	(1,000)	4,000	5,000	(1,000)	4,000	5,000	(1,000)
other costs	Other Capex		1,000	(1,000)									
Server costs	Hardware Capex		1,000	(1,000)									
Total		20,250	22,250	-2,000	20,250	22,250	-2,000	20,250	22,250	-2,000	20,250	22,250	-2,000

Note:
The columns are defined to calculate EAC, which is the sum of Actual costs till the last fiscal period and Planned costs from current to future fiscal periods.

Budget allocation

Portfolio managers can manage and approve the budget for projects. The approved budget helps project managers to plan and meet the expenses to execute work.



Plan and approve the budget for a shorter planning cycle at monthly, quarterly, or yearly level using the lean budgeting and funding feasibility. Lean budgeting helps Portfolio managers to track the value in return for the approved budget and to better plan the budget for future fiscal periods.

Note:
If the budget is allocated monthly, the total budget is rolled up to quarterly and yearly level. Similarly, if the budget is allocated at a quarterly or yearly level, the equal breakdown happens till monthly level.

For more information on how to allocate, approve, and handle budget for projects, see, Manage budget of your planning items in Strategic Planning.

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Tip:
In the budget allocation view, Portfolio managers review the EAC to understand the financial projections made by Project managers and use the **Copy cost as budget** option to allocate the entire planned cost as budget.

Choose the cost type as the attribute to allocate and approve the budget for individual cost types such as labor, non-labor.

Project managers can view the approved budget at the required time scale by switching to the Budget vs planned display mode. As the work progresses and the actuals are captured, you can compare the budget and actual costs using Budget vs planned display mode and reforecast the planned costs where the actuals are exceeding the budget using the inline edit feature at the required time scale.

Product managers can compare the latest cost with the approved budget by Capex or Opex, cost types, and for the required time scale at monthly, quarterly, or yearly level. The comparison view provides insights to Product managers to locate any variance at expense type or cost type, and at which fiscal period. Product manager can leverage this information to request for additional budget from the Portfolio manager.

You can migrate the budget of existing active projects from the Classic UI to Next Experience. Financials in the Next Experience has new budget data model that facilitates to store the budget at a detailed level by monthly breakdowns and cost types. You can migrate the budget for active projects and demands individually or by bulk using the scheduled job.

Note:
The migrated budget is captured in the `sn_invst_pln_invst_budget` table to enable the lean budgeting for required time scope.

Benefit plans

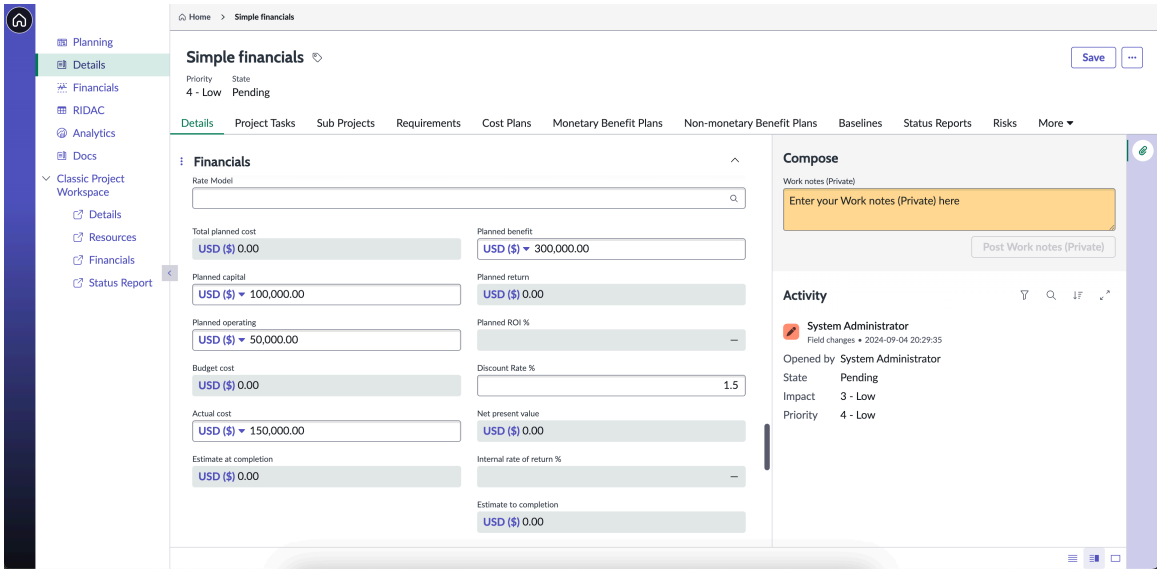
Monetary benefit plans capture potential benefits accrued while executing a planning item. Non-monetary benefit plans capture the potential non-financial benefits accrued while executing a planning item. You can create and manage monetary benefit plans and non-monetary benefit plans to capture the potential benefits of your planning items.

Instead of switching to and fro from the financials record page to benefit plan tabs, you now have a seamless experience to manage all the cost plans and benefit plans from the Cost and benefits view and can leverage the new financials experience with the side panel and grids for quick forecasting and tracking of monetary benefit plans.

Simple financials

Simple financials gives you the ability to enter the preliminary high-level planned capex, opex, benefit and so on from the Details page without capturing the costs plans from the Cost view. You can update the simple financials values as required until you have the planned and actual costs captured.

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Using the baseline feature, you can capture these simple financial values in a baseline and compare them against any existing baseline. You can:

- Reforecast simple financials and compare the by selecting the Current Financials from the list of baselines.
- Capture the planned and actual expenses as the project progresses and compare any financial baseline with simple financials baseline to track the financial performance of the project.

Configure multicurrency for projects

Select investment currency as an additional currency, which can be different from your functional currency, to manage financial records of your projects.

Before you begin

- You can define investment currency for projects which do not have any financials records, such as cost plans, expense lines, benefit plans, and actual benefits. To define a investment currency for existing work, you should delete all the financial records and configure the investment currency.
- Enable monetary benefit plans for projects
- Role required: admin

Procedure

1. Navigate to **Workspaces** > *Project Workspace* and select a project.
2. Select the **Financials** tab.
3. Select **Currency** field, and select the **Edit investment currency option**.
   Edit investment currency modal is displayed with an option to select investment currency.
4. Choose the suitable investment currency from the **Investment currency** list.
5. Select **Confirm** to save the investment currency selection.

Add, edit, or delete cost plans

Create a cost plan for a required duration to track your planned and actual expenses. Edit cost plans to adjust your planned expenses and delete any de-scoped forecasts.

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Before you begin

Role required: it_project_manager

Procedure

1. Navigate to **Workspaces** > *Project Workspace* and open a project.
2. Select **Financials** from the left menu.

Tip:
Create a financial baseline immediately after capturing the initial planned costs to have a snapshot of your planned costs. Use this baseline to compare it against the baselines from later dates, as the work progresses, to identify the variance between initial planned costs and actual expenses.

This helps you to plan for the future expenses and re-forecast the planned costs.

Manage budget of your projects using Project Workspace

Allocate, manage, and approve budget for your projects. Lean budgeting enables you to allocate budget for short planning cycles for different fiscal periods such as monthly, quarterly, or yearly breakdown level rather than allocating the budget to the complete duration of the planning item.

Before you begin

- As an Admin, enable the property to work on budgeting. For more information, see Enable financial budget allocation for projects in Project Workspace.
- As an Admin, configure the attribute to allocate and approve budget by cost type or expense type. For more information, see Configure budget attribute at instance-level to allocate budget.
- Role required: it_portfolio_manager

Procedure

1. Navigate to **Workspaces** > *Project Workspace* and open a project.
2. Select **Financials** from the left menu.
3. Enable the **Budget allocation** toggle (Budget allocation).
4. You can manage the budget by one of the following ways for the selected time scale at monthly, quarterly, or yearly level.
   - Double-click each cell in the Budget column to manually enter the value.
   - Select **Copy cost as budget** from the Budget column options to copy the EAC as budget.

   You can always reforecast the budget for each cost type using the in-grid editing feature even if the EAC is copied as budget.

Note:
Unapproved budget values are indicated with icon.

5. Select **Approve budget** (Approve budget).
   Approve budget confirmation window is displayed. The **Create a financial baseline for this budget approval** option is enabled by default which captures the latest budget and financial estimates.

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Tip:
The financial baseline created while approving the budget can be compared with the future baselines once the actual expenses are captured to track financial performance.

6. On the confirmation window, select **Approve** (Approve).

Result
Budget widget is updated to reflect the latest approved budget. Project Manager can view the approved budget and compare it with the planned costs using the **budget vs cost** view by cost type.

Add or edit expense lines

Create or edit expense lines to capture the actual costs. You can associate the expense lines with a cost plan or create standalone expense lines to record unplanned expenses.

Before you begin
Role required: it_project_manager

About this task
An expense line is part of the project cost plans that can be associated with a specific source. You can create multiple expense lines for a cost plan. Only the expense lines that are in the processed state are considered for roll-ups on the work item.
For unplanned expense lines which aren't associated with any cost plan, the system automatically creates a cost plan or associates with an existing system-generated cost plan of the same expense type.

Procedure

1. Navigate to **Workspaces** > *Project Workspace* and open a project.
2. Select **Financials** from the left menu.
3. Add an expense line using one of the following options.

4. On the Create expense line form, fill the fields.
   For a description of the field names, see Create expense line form.
5. Select **Save**.

Note:
The expense lines created for sub-projects can be viewed in the Cost screen of the parent project.

Generate labor costs

Generate labor costs in the Costs view for attribute-based resource assignments based on the financial attributes configured in the planning attributes page.

Before you begin
Role required: it_project_manager

Procedure

1. Navigate to **Workspaces** > *Project Workspace* and open a project.
2. Select **Financials** from the left menu.

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3. Select **Generate labor costs** (Generate labor cost).
4. Select **Generate** on the Generate labor costs confirmation window.

> **Note:**
> Alternatively, you can activate a scheduled job to automatically create baselines at the required cadence.

Create and compare financial baselines for your projects

Create and compare financial baselines to get a snapshot of the project expenses and compare the planned costs with the actual expenses.

Before you begin

Role required: it_project_manager

Procedure

1. Navigate to **Workspaces** > *Project Workspace* and open a project.
2. Select **Financials** from the left menu.
3. Create or compare baselines.

> **Tip:**
> You can migrate existing financials baselines of your projects or demands from Classic UI to Financials in Next Experience.

For more information on how to migrate financial baselines of demands, see Migrate financial baselines of demands to Next Experience.

For more information on how to migrate financial baselines of projects, see Migrate financial baselines of projects to Next Experience.

Create monetary benefit plans for your projects in Project Workspace

Create and manage monetary benefit plans to capture the potential benefits while executing your projects.

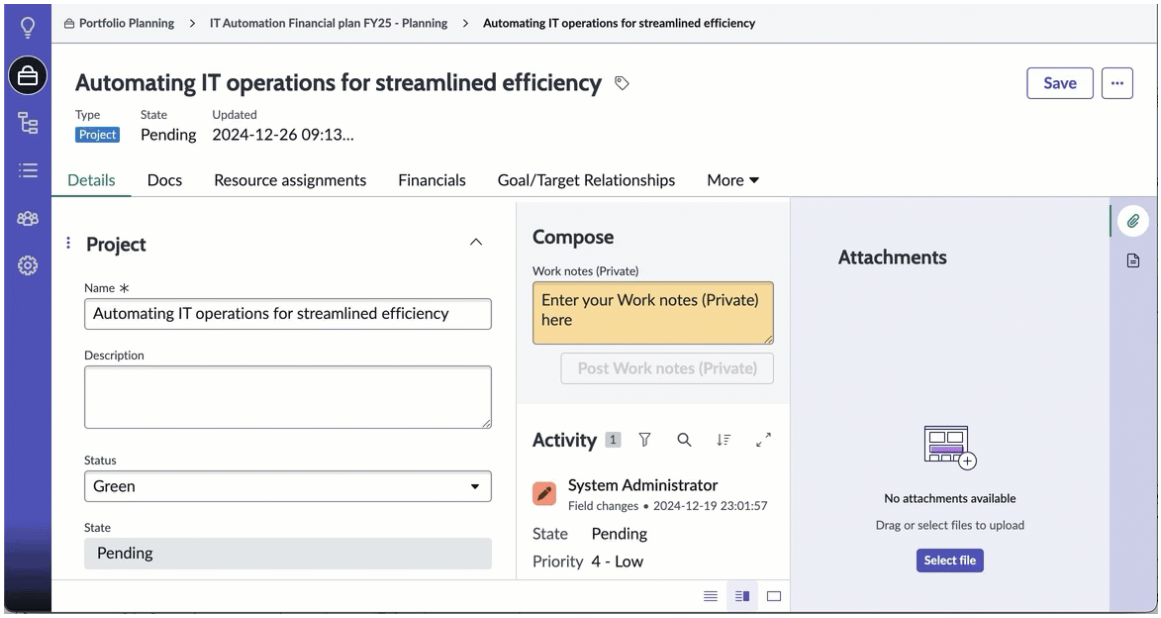
Before you begin

- Enable monetary benefit plans for projects
- Role required: sn_align_ws.spw_financial_user

Procedure

1. Navigate to **Workspaces** > *Project Workspace* and open a project.
2. Select the **Monetary Benefit Plans** related list.
3. Select **New**.

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4. On the Benefit Plan form, fill the fields.
   For a description of the field names, see Benefit Plan form.
5. Select **Save**.

Edit monetary benefit plan

Edit a planned monetary benefit plan to revise the benefits, dates, offset, and so on, to maintain the updated financial records as your work progresses.

Before you begin

- Create monetary benefit plans for your projects in Project Workspace
- Role required: sn_align_ws.spw_financial_user

Procedure

1. Navigate to **Workspaces** > *Project Workspace* and open a project.
2. Select the **Monetary Benefit Plans** related list.
3. Select the name of a required benefit plan.
4. In the Details tab, edit the required fields and select **Save**.

Capture actual monetary benefits

Capture the actual benefit from the planned benefits to measure revenue and calculate the profits.

Before you begin

- Create monetary benefit plans for your projects in Project Workspace
- Role required: sn_align_ws.spw_financial_user

Procedure

1. Navigate to **Workspaces** > *Project Workspace* and open a project.
2. Select the **Monetary Benefit Plans** related list.

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3. Select name of the required benefit plan and select the **Monetary Benefit Plan Breakdowns** list to view the monetary benefit plans breakdown.
4. Select the value from the **Entered benefit** field.
5. **Optional:** You can change the previously captured planned benefit from the **Entered benefit** field.
6. Enter the actuals benefits resulted from the work execution in the **Actual benefit** field and select **Save**.

Manage non-monetary benefit plans for your planning items in Portfolio Planning

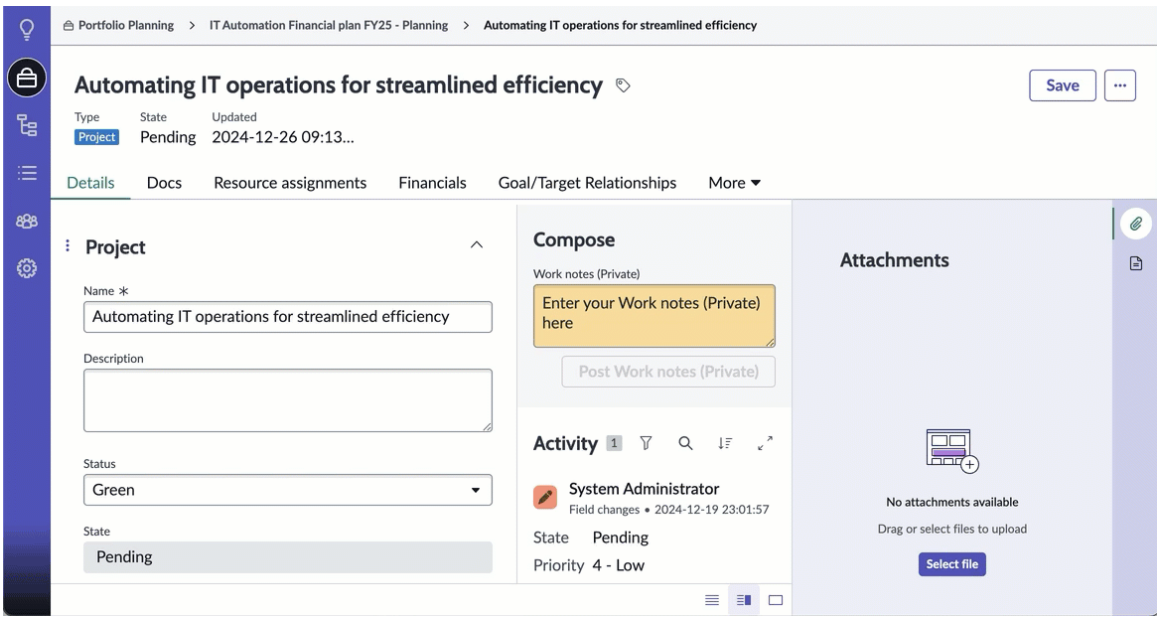
Create and manage monetary benefit plans to capture the potential benefits while executing your planning items.

Before you begin

Role required: sn_align_ws.spw_financial_user

Procedure

1. Navigate to **Workspaces** > *Portfolio Planning Workspace* and select portfolio plan.
2. Select a planning item from the Planning module.
3. Select the **Non-monetary Benefit Plans** related list.



4. On the Benefit Plan form, fill the fields.
   For a description of the field names, see Benefit Plan form.
5. Select **Save**.

Export financials as Excel or CSV file

Export the costs or baseline comparison data of your projects to share them with your stakeholders.

Before you begin

Role required: it_project_manager

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Procedure

1. Navigate to **Workspaces** > *Project Workspace* and open a project.
2. Select **Financials** from the left menu.
3. Select the Export option ( ).
4. In the Export side panel, select **Excel** or **CSV** from the File type list and select the **Export** button ( ).

   The financials data is download as an Excel or CSV file with `name_fin_mmddyy` naming convention. The breakdown of the naming convention:

   a. name - fetches the first 10 characters from the name of the planning item.

   b. fin - denotes that the file has financial data.

   c. mmddyy - system date format when you're exporting this data.
   For example, if you're downloading financials data for a planning item named Documentation on January 26, 2024, then the file name reads `documentat_fin_012624`.

> **Note:**
> You can export financials data from Cost view and Baselines comparison view.

Resource planning with Project Workspace

Use the Resource Management application to allocate and manage your resources in the Project Workspace.

Key benefits

Using Resource Management, you can create, plan, track, and monitor resource assignments at a project or task level in the Project Workspace. With Resource Management in Project Workspace, you can:

- Create an attribute-based resource assignment.
- Change the resource assignment dates, resources, efforts, and proposed allocations at any level of the project.
- View resource allocations using new heatmap modal. The allocations are color-coded to display the availability of the resources.
- View the primary attributes such as Group, Role, and Skill of each resource in the resource assignment pane. They are useful when you work on reassigning a task to a different user with the same primary attributes.
- Switch between **Hours**, **FTE**, or **Person Days** effort types to view resource allocations.

Resource assignment pane

The resource assignment pane displays a interface where you add resource assignments for your projects or project tasks.

Resource assignment is a process of allocating a resource or group of resources to a project task. When a resource assignment is initiated, a resource plan is auto-generated in the back-end of the project management system. This resource plan details the information of how resources would be allocated throughout the project. Resource assignments are approved by the resource manager to make sure that the allocation aligns with the overall resource strategy, considering factors such as availability, skills, and project priorities. Resource assignments remain dynamic and can be edited throughout the project life cycle. Resources can be assigned based on defined attributes such as skills, expertise, or other criteria relevant to the project or task.

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Note:

Resource efforts calculations are driven by the `com.snc.resource_management.exclude_status_from_capacity` property. Admin can configure this property to calculate efforts for certain defined resource assignments only. For more information, see Resource Management properties.

Edit the child resource assignments directly using the inline editing from the resource assignment pane.

Resource allocations and heatmap

The Resource allocation view combines a hierarchical task structure by resource with time-based and effort-based allocation metrics, such as hours, FTE, or person-days over weekly or monthly intervals.

Note:
Switch between different efforts such as hours, FTE, or person days to view a resource allocation heatmap based on the selected effort type.

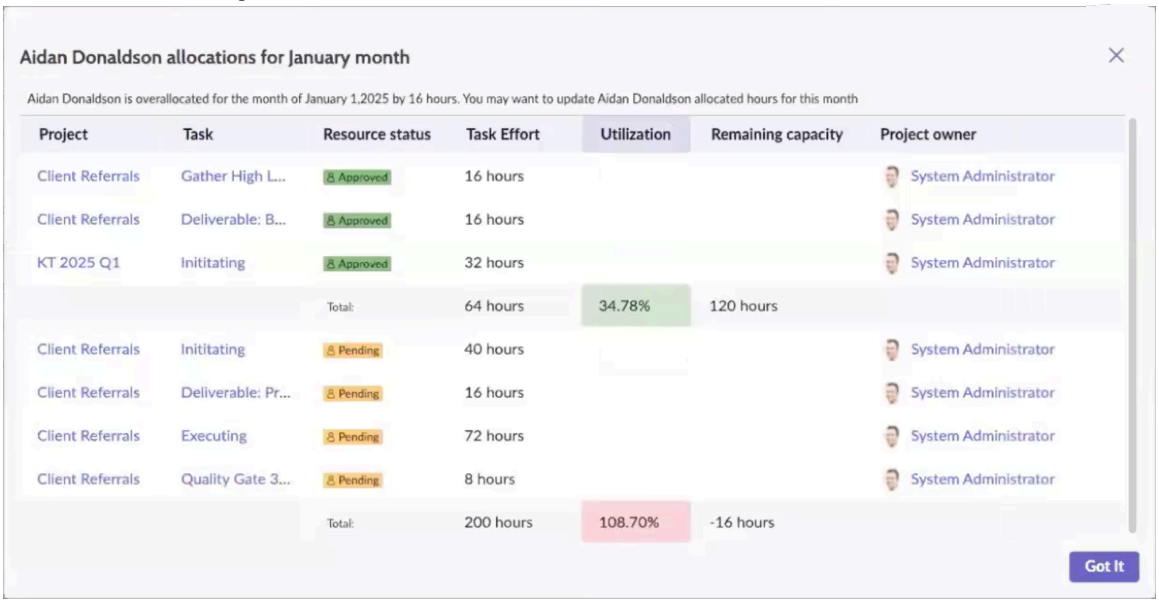
Allocation heatmap modal gives you an overview of the resource utilization to identify the over allocated and the available resources. The allocations are color-coded to display the availability of the resources and help you to identify the availability of the resource for the filtered time frame. The new heatmap modal gives you the following insights for a resource such as the assigned tasks with their respective project owner, resource status, efforts for each task, total utilization percentage for the approved tasks, and the remaining capacity.

Very Over Utilized	150 +	%
Over Utilized	100 - 150	%
Full Utilization	100	%
Good Utilization	51 - 99	%
Under Utilized	0- 50	%

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Heatmap breakdown

Allocation heatmap breakdown



From the above example, you can see the breakdown of the approved work items along with the rolled up efforts, Utilization percentage, and the Remaining capacity for the month of January 2025. The approved work is within the resource capacity as the remaining capacity is 120 hours. Resource manager can use these insights to decide and allocate the pending work items to another resource with available effort.

Resource assignments in Project Workspace

Optimize project execution by assigning resources to tasks within the Project Workspace. You can create resource assignments for any project or project task, specifying the tasks to be performed and the resources to be allocated.

Resource assignments

Resource assignment is a process of allocating a resource or group of resources to a project task. When a resource assignment is initiated, a resource plan is auto-generated in the back-end of the project management system. This resource plan details the information of how resources would be allocated throughout the project. Resource assignments are approved by the resource manager to make sure that the allocation aligns with the overall resource strategy, considering factors such as availability, skills, and project priorities. Resource assignments remain dynamic and can be edited throughout the project life cycle. Resources can be assigned based on defined attributes such as skills, expertise, or other criteria relevant to the project or task.

Note:

Resource efforts calculations are driven by the `com.snc.resource_management.exclude_status_from_capacity` property. Admin can configure this property to calculate efforts for certain defined resource assignments only. For more information, see Resource Management properties.

Edit the child resource assignments directly using the inline editing from the resource assignment pane.

Key features

With resource assignments, you can:

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- Determine the resource engagement timing and allocate resources for specified durations, contributing to the creation of a timeline for task completion.
- Align task execution with the project plan, ensuring tasks are carried out in accordance with specified timelines and resource requirements.
- Initiate an approval process that is conducted by a resource manager and make sure it aligns with project targets and resource availability.

Related topics

Create resource assignments using Project Workspace

Update a resource assignment from Project Workspace

Resource plans

Create resource assignments using Project Workspace

Create an attribute-based resource assignment in the Project Workspace application for any project or project task.

Before you begin

After a resource assignment is created, a Resource Plan is created automatically in the back-end. The resources are allocated to the project and approved by the Resource Manager. You can edit the assignment throughout the project life cycle.

Role required: it_project_manager

Procedure

1. Navigate to **Workspaces** > **Project Workspace** and open a project.
2. View the resource assignment pane by enabling the **Resource assignments** toggle button.

   Note:
   If the property *sn_pw.enable_resource_planning* is set to true, then the **Resource plan** toggle button and resource assignment pane are displayed in Project Workspace. The default value is false. You must have the pps_admin role to enable this property.

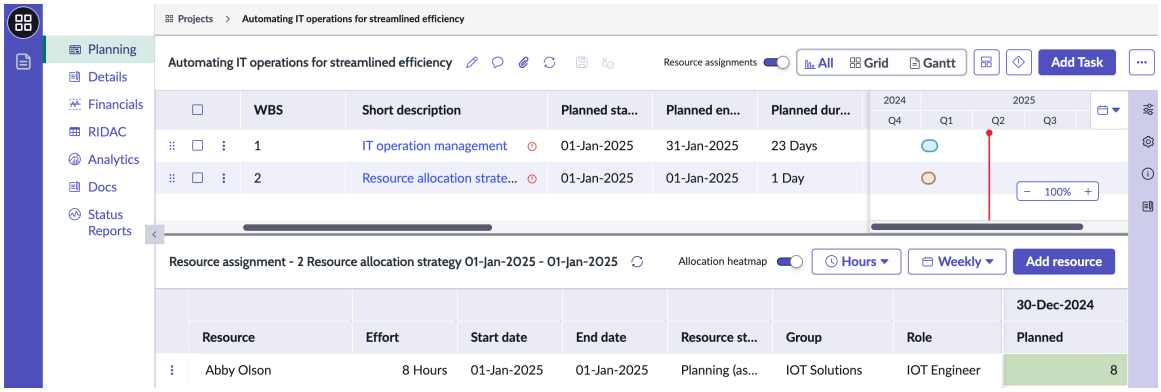
3. From the Planning pane, double-click the **Resource assignees** field of a project task to add resource.

   You can assign the resources from both planning and resource assignment pane.

4. From the resource assignee list, select a user or group and press **Enter**.
   When you create a resource assignment, the user or group allocation is based on the selected effort type. For example, when you add a user and the effort type is selected as hours, the allocations are displayed in hours.
   A resource assignment record is created and auto-saved. The resource assignment form auto-populates the project or task information.
5. **Optional:** From the resource assignment pane, create a resource assignment for a project or task by selecting **Add resource**.

   (Optional) You can create a resource assignment for a project from the resource assignment pane only.

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6. Select the expense type of the assignment based on the work as **Opex** or **Capex**.
   A resource can use this information while capturing efforts using the time sheet portal. Once the time sheet is approved, an expense line is created for the project capturing the expense as capex or opex, based on the selected expense type.
7. View the resource allocations in the heatmap by enabling the **Allocation heatmap** toggle button.

   You can switch from the weekly view to the monthly view based on your requirement using **Monthly** list.

   Extend, edit, or delete the resource assignments using the row context menu in resource assignment pane.

What to do next

Update a resource assignment from Project Workspace

Related topics

- New Resource Assignment form
- Delete a resource assignment from Project Workspace
- Update the resource allocation in a heatmap
- Realign resource assignment to project task

Create a resource assignment for a user in Project Workspace

Use Project Workspace to create a user-based Resource assignment. User records store information about individuals who access your instance or application. These records can be assigned to groups and roles to determine what records and actions can be accessed by individuals.

Before you begin

Role required: admin or it_project_manager

Procedure

1. Navigate to **All** > **User Administration** > **Users**.
2. Create a user .
3. Assign the pps_resource role to the users required for user-based resource assignment. For more information on how to assign a role, see Assign a role to a user .
4. Navigate to **Workspaces** > **Project Workspace** and open a project.
5. From the Planning pane, double-click the **Resource assignees** field for a project task.

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6. In the **Resource** field, select the user from step 2 and press **Enter**.

   The **Resource status** column helps to identify any Pending or Unapproved work items assigned to a resource.

   Note:
   The status of the assigned work is rolled up to the resource level and the resource card level. If there are any pending or unassigned work items in the top tray, the rolled up status at resource level and card level shows Pending.



   A resource assignment record for the user is created and auto-saved.

Related topics

- New Resource Assignment form
- Delete a resource assignment from Project Workspace
- Update the resource allocation in a heatmap
- Realign resource assignment to project task

Create a resource assignment for a group in Project Workspace

Use Project Workspace to create a group and associate it to your resource assignment. You can associate a set of users who share a common purpose to a group.

Before you begin
Role required: admin or it_project_manager

About this task
Create group and assign roles to them. Users assigned to the group inherit the roles.

Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Create a group.

   For more information on how to create a group, see Create a user group.

3. Assign the pps_resource role to a group required for group-based resource assignment.
   For more information on how to assign a role to a group, see Assign a role to a group.
4. Add members to the group so that the users inherit all the roles assigned to the group.
   For more information, see Add a user to a group.
5. Navigate to **Workspaces** > **Project Workspace** and open a project.
6. From the Planning pane, double-click the **Resource assignees** field for a project task.

   You can assign the resources from both planning and resource assignment pane.

7. In the **Resource** field, select the group from step 2 and press **Enter**.

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Note:
When you select a group in the **Resource** field, the assignment is created in the Pending state. When an assignment type is set to group, an assignment is created for all the members of the group, and the allocation hours are split evenly for all the members of that group.



Resource	Effort	Start date	End date	Resource st...	30-Dec-2024 Planned	06-Jan-2025 Planned	13-Jan-2025 Planned	20-Jan-2025 Planned	27-Jan-2025 Planned
kajal portfolio manager	21 Hours	01-Jan-2025	31-Jan-2025	Planning (as...	4	4	4	4	5
kajal testGroup1_sn	50 Hours	01-Jan-2025	31-Jan-2025	Planning (as...	14	9	9	9	9
kajal prj manager2	6 Hours	01-Jan-2025	31-Jan-2025	Planning (as...	2	1	1	1	1
kajal prj manager8	6 Hours	01-Jan-2025	31-Jan-2025	Planning (as...	2	1	1	1	1
kajal prj manager4	6 Hours	01-Jan-2025	31-Jan-2025	Planning (as...	2	1	1	1	1
kajal prj manager7	6 Hours	01-Jan-2025	31-Jan-2025	Planning (as...	2	1	1	1	1
kajal prj manager5	6 Hours	01-Jan-2025	31-Jan-2025	Planning (as...	2	1	1	1	1
kajal prj manager3	5 Hours	01-Jan-2025	31-Jan-2025	Planning (as...	1	1	1	1	1
kajal prj manager6	5 Hours	01-Jan-2025	31-Jan-2025	Planning (as...	1	1	1	1	1
kajal prj manager9	5 Hours	01-Jan-2025	31-Jan-2025	Planning (as...	1	1	1	1	1
kajal prj manager1	5 Hours	01-Jan-2025	31-Jan-2025	Planning (as...	1	1	1	1	1

Modify the resource status and effort values of the child assignments through the new modal.

A resource assignment record for the group is created and auto-saved. The resource assignment is created for all group members who have this group as their primary resource group.

Related topics

- New Resource Assignment form
- Delete a resource assignment from Project Workspace
- Update the resource allocation in a heatmap
- Realign resource assignment to project task

Create an attribute-based resource assignment

Create an attribute-based resource assignment in Project Workspace. You can pre-define attributes based on your requirement.

Before you begin

Role required: pps_admin or it_project_manager

Procedure

1. Create a planning attribute.

   Note:
   If the assignment is attribute-based, then the assignment is created in the Unassigned state. You should have the pps_admin role to configure the planning attributes.

2. Navigate to **All** > **Employee Profile** > **Employee Profiles**.
3. Create an employee profile.
   For more information, see Activate Employee Profile.
4. Navigate to **Workspaces** > **Project Workspace** and open a project.
5. From the Planning pane, double-click the **Resource assignees** field for a project task.

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You can assign the resources from both planning and resource assignment pane.

6. From the resource assignee list, select a user or group and press **Enter**.
   You can create new custom attributes, such as location, in addition to group, skill, and role, and can also leverage these custom attributes to create resource assignments.

   A resource assignment record for an attribute is created and auto-saved.

   Note:
   The **Primary group**, **Primary skill**, and **Primary role** attributes can be enabled for the Resource Management. You can create more attributes based on your requirement.

Related topics

New Resource Assignment form

Delete a resource assignment from Project Workspace

Update the resource allocation in a heatmap

Realign resource assignment to project task

Update a resource assignment from Project Workspace

Update a resource assignment that is associated with a project or project task.

Before you begin

Role required: it_project_manager

In Resource Assignments, any changes made to the status of group resource assignment roll down to all associated child resource assignments status. Similarly, any changes made to the status of child resource assignments automatically roll up to the corresponding group resource assignment status.

Procedure

1. Navigate to **Workspaces** > **Project Workspace** and open a project.
2. View the resource assignment pane by enabling the **Resource assignments** toggle button.
3. On the resource assignment pane, double-click any cell to edit the entire row.
   Alternatively, you can edit the resource assignment from the row context menu. From the resource assignment pane, select the row context menu (⋮) of resource assignment record and then select **Edit**.
4. Edit the desired field, and select anywhere on the data grid to save the details.

   The resource assignment is updated in the resource assignment pane.

   Note:
   When a resource is added on an empty resource assignment, which has more than one Full-time equivalent (FTE) effort, then an additional row is created automatically and the resource assignment is auto-updated in both the rows.

   Extend, edit, or delete the resource assignments using the row context menu in resource assignment pane.

Related topics

Extend a resource assignment

Delete a resource assignment from Project Workspace

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- Update the resource allocation in a heatmap
- Realign resource assignment to project task

Extend a resource assignment

Extend the date of an allocated resource assignment and allocate resources for the extended period.

Before you begin

Role required: resource_manager

About this task

Assume that work on a project has started, but there's a need to extend the date of an allocated resource assignment because the project has been extended. In this scenario, you can extend the date of the allocated resource assignment. The new date by which the resource assignment is extended doesn't have any impact on the existing allocated hours. While extending the resource assignment, you can specify the new end date and the request type. Based on the request type selected, the required allocated hours are auto-filled.

For example, assume that you allocated 100 hours for 2 months, 50 hours for each month. Now, you want to extend the resource assignment by one month. For the extended month, allocation records are created based on the request type selected.

Procedure

1. Navigate to **Workspaces** > **Project Workspace** and open a project.
2. Extend the resource assignment using one of the following options.

Result

- The assignment end date is updated and allocation is created based on resource's availability.
- The extended FTE or hours or person days is divided equally for the extended resource period.

Related topics

- Resource assignments in Project Workspace
- Create resource assignments using Project Workspace
- Update a resource assignment from Project Workspace
- Delete a resource assignment from Project Workspace
- Update the resource allocation in a heatmap
- Realign resource assignment to project task

Move a resource assignment in Project Workspace

Move the resource assignment to a new start and end dates to accommodate changes in task scheduling or resource allocation. Shift assignments to balance workloads across resources and avoid over-allocation.

Before you begin

Role required: resource_user, resource_manager

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About this task

- When you move an assignment to a new start and end dates, the initial requested or approved efforts are retained for the latest duration.
- When an assignment is moved, the Ready for review state is retained and the assignment remains accessible to resource managers for work allocation.
- You cannot move a resource assignment if actuals efforts are entered for the work.
- New assignment dates should be within the task duration dates.

Procedure

1. Navigate to **Workspaces** > **Project Workspace** and open a project.
2. View the resource assignment pane by enabling the **Resource assignments** toggle button.

   Note:
   If the property *sn_pw.enable_resource_planning* is set to true, then the **Resource plan** toggle button and resource assignment pane are displayed in Project Workspace. The default value is false. You must have the pps_admin role to enable this property.

3. Select a project task to view the assignments associated to the task.
4. From the resource assignment pane, select the row context menu (⋮) and then select **Move**.
5. From Move assignment modal, select a **New start date** using the date picker modal.
6. **Optional:** Change the assignment status using the **New status** list to one of the following available statuses.
   Changing the status is restricted to the resource_manager role.
7. Select **Confirm**.
   When you move the resource assignment for a group, the assignments are moved for all members of that group. You cannot move assignments for individual users within the group or for child resource assignments.

Related topics

Extend a resource assignment

Update a resource assignment from Project Workspace

Delete a resource assignment from Project Workspace

Update the resource allocation in a heatmap

Realign resource assignment to project task

Delete a resource assignment from Project Workspace

Delete a resource assignment from Project Workspace. Deleting an assignment also deletes all associated resource allocations.

Before you begin

Role required: it_project_manager

Procedure

1. Navigate to **Workspaces** > **Project Workspace** and open a project.
2. Enable the **Resource assignments** toggle button to view the resource assignment pane.

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3. From the resource assignment pane, select the row context menu (⋮) and then select **Delete row**.
   The resource assignment is deleted from the resource assignment pane.

Manage resources using resource board

View and manage all the resource assignments without navigating through individual tasks using the resource page. Set up a resource board to automatically generate a resource view in Resource Management Workspace based on your project-associated resources to support forecasting and visualization of resource demands.

Before you begin
Role required: it_project_manager, resource_user

About this task
When you select **Resources** from the left menu, you are redirected to a page that generates a resource board based on the resource assignees within that project. The resource board is created within the Resource Management Workspace and shows all the resources and tasks associated with that specific project. You can also view how many tasks are assigned to each resource.

For example, Simon is a resource who is allocated to two project tasks. When you select Simon from the resource board, you can view all the project tasks to which Simon is assigned for a project.

Procedure

1. Navigate to **Workspaces** > **Project Workspace** and open a project.
2. Open the resource page of the project by selecting **Resources** from the left menu.
3. Edit the resource status, task effort, start date, end date, or other attributes of the resource assignment as required.
   You can edit the row, reassign, extend, or open a resource assignment. You can create a new resource assignment directly from the resource board in the Resource Management Workspace. You can select the unassigned tasks toggle to view all the unassigned resources that are not currently assigned to any task in that project. For sub-projects, you can select a sub-project and then select **Resources** to view the resources allocated to that sub-project.

Related topics

Create a resource card

Update the resource allocation in a heatmap

Use the allocation heatmap capability in Project Workspace to view and update the resource allocation.

Before you begin
Role required: it_project_manager

About this task
The **Allocation heatmap** toggle button provides a detailed breakdown of the allocation of an individual resource. The allocation heatmap represents the total utilization of a resource for a week or month. By default, allocation information is displayed for the week. This information helps project managers to plan their resources effectively at the project or task level.

Integrate your ServiceNow® instance with your organization's Microsoft Teams to enable collaboration of your projects and resource allocations in Microsoft Teams. With the Microsoft

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Teams integration, you can communicate with the project team members and share real-time updates on the project and resource allocation status. For more information, see Setting up PPM collaboration for Microsoft Teams.

Within the Resource Allocation view, the Approved state is prioritized and listed first, followed by other statuses based on their order in the record list. Additionally, if a user has no capacity during a given period, the corresponding cell is displayed in red color.

Procedure

1. Create resource assignments using Project Workspace.
2. View the resource allocations in the heatmap by enabling the **Allocation heatmap** toggle button.
   You can switch from the week view to the month view based on your requirement.
3. Edit the desired field and select anywhere on the data grid to save the details.
   Work allocation is based on capacity. The allocations are color-coded to display the availability of the resources as shown here. These colors help to identify the availability of the resource for a particular task.

Very Over Utilized	150 +	%
Over Utilized	100 - 150	%
Full Utilization	100	%
Good Utilization	51 - 99	%
Under Utilized	0- 50	%

4. Edit the resource allocation window by selecting the allocation hours cell.



   Enable the **Show actuals** toggle to view the actuals of each resource. The actuals can't be edited from Project Workspace.

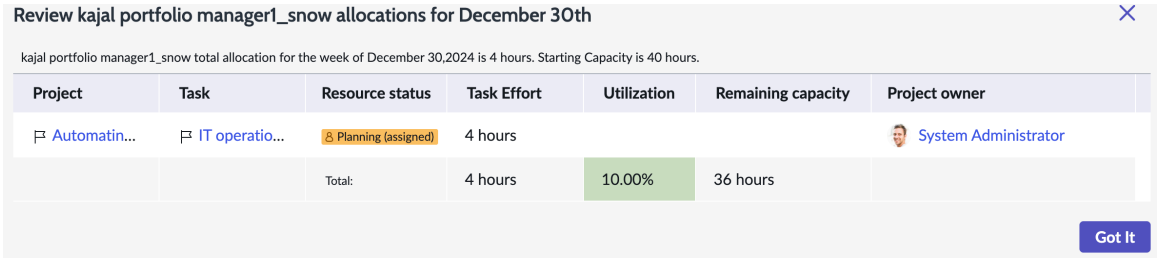
5. From the resource allocation window, view and track the assigned **Project**, **Task**, **Resource status**, **Task effort**, **Utilization**, **Remaining capacity**, and **Project Owner** of a resource.

   The resource allocation is made according to the schedule of the resource, provided that the resource has a schedule.

   The Allocation heatmap modal provides the **Resource status**, **Remaining capacity**, and **Utilization** columns to support resource managers in evaluating task efforts.

6. Send a direct message to the project owner on Microsoft Teams by selecting the **Project Owner** field.

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Note:
The **Project Owner** can only be selected if your ServiceNow® instance is integrated with your organization's Microsoft Teams. Resource assignments on demands are visible in the allocation window both before and after they become projects.

Related topics

Create resource assignments using Project Workspace

Realign resource assignment to project task

Realign or synchronize the resource assignment dates with the project task dates. This synchronization helps to schedule and align the resource assignments with the timeline of project task.

Before you begin

Role required: it_project_manager

Procedure

1. Navigate to **All** > **Workspaces** > **Project Workspace** and open a project.
2. From the project planning pane, double-click the **Planned start date** or **Actual start date** of a project task.
3. Edit the field and select **Ok**.
4. From the project task row, select the row context menu and then select **Realign assignments to task**.
   Alternatively, use the Resources not synced icon to synchronize the resource assignments dates with the project dates at a project level. Realign assignments to task related link is available to perform the same action while using forms.

Result

The resource assignments dates are synchronized with the project task dates.

Related topics

Resource assignments in Project Workspace

Project Workspace reference

Project Workspace reference

Reference information to provide additional details about Project Workspace, such as the fields, user roles, tables, scheduled jobs, system properties, and custom scripts.

The components and properties installed with Project Workspace are the same as mentioned in the Project Management. For more information, see these reference topics:

- Properties installed with Project Management
- Resource Management properties

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Form field information for Project Workspace

Field information for forms used in the Project Workspace application.

Action form of Project Workspace

Learn about the fields on the Action form of the Project Workspace. Use this form to add an action to your projects.

Action form

Field	Description
Number	System-generated number with a configurable prefix.
State	Current state of the action. All new action records are created with the state set to Open. The available states are: • Pending • Open • Work in Progress • Closed Complete • Closed Incomplete • Closed Skipped
Priority	Urgency for implementing or approving the action based on impact.
Estimated Cost	Estimated cost generated by the action.
Impact	The impact on the outcome of the project if you don't implement the action.
Approval	Status of approval from the stakeholders for the action. The available options are: • Not Yet Requested • Requested • Approved • Rejected
Assigned to	Primary resource assigned to implement the action.
Due date	Requested date on which the action must be approved or implemented.
Parent	The project to which this action belongs.
Show on project status report	Option to specify whether the action information should be included in the project status report.
Short description	Brief description of the action such as what the action involves, how to implement the action, who it affects, and the action outcome. As you start entering the title for your action, the related actions that potentially match your action title appear.

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Action form (continued)

Field	Description
	Click the suggestion icon () to select a description from the list of predefined actions.
Description	Details of the action and its potential impact.
Work notes	Information about the action. Add work notes to communicate about the status of action approval, rejection, or implementation with other users.

Decision form on Project Workspace

Learn about the fields on the Decision form of the Project Workspace. Use this form to add decisions to your projects.

Decision form

Field	Description
Number	System-generated ID number with a configurable prefix.
State	Current state of the decision. All new decision records are created with Open state. The available states are: • Pending • Open • Work in Progress • Closed Complete • Closed Incomplete • Closed Skipped
Priority	Urgency of approving or implementing the decision based on possible impact.
Decision status	Status of the decision. The available options are: • Pending • Approved • Rejected
Impact	Impact on the outcome of the project if you don't implement the decision.
Approval required	Option for determining whether approval of the decision is required.
Estimated Cost	Estimated cost of implementing the decision.
Due date	Requested date on which the decision must be approved or implemented.
Assigned to	Primary resource assigned to work on the decision. The default value is the name of the user creating the decision record.
Parent	Project number to which this decision belongs.

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Decision form (continued)

Field	Description
Show on project status report	Option to specify whether the decision information should be included in the project status report.
Short description	Brief description of the decision such as what the decision is about, who made it, what it affects, and the decision outcome. As you start entering the title for your decision, related decisions that potentially match your decision are displayed. Click the suggestion icon ( ) to select a description from the list of predefined decision descriptions.
Description	Details of the decision and its potential impact.
Work notes	Information to record and track the status of decision implementation or approvals.

Export status report form on Project Workspace

Learn about the fields on the export status report form on the Project Workspace. Use this form to export status of your projects.

Export status report form

Field	Description
Report to export	Existing project status report that you want to export as PowerPoint.
PowerPoint template	PowerPoint template to apply for your status report.

Issue form on Project Workspace

Learn about the fields on the Issue form of the Project Workspace. Use this form to add an issue to your projects.

Issue form

Field	Description
Number	System-generated ID number with a configurable prefix.
State	Current state of the issue. All new issue records are created in the Open state. The available states are: • Pending • Open • Work in Progress • Closed Complete • Closed Incomplete • Closed Skipped

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Issue form (continued)

Field	Description
Priority	Urgency of resolving or managing the issue based on possible impact.
Estimated cost	Estimated cost generated by the issue.
Impact	Impact on the outcome of the project if the issue remains unresolved.
Due date	Requested date for one of the following situations: • If the issue has an assigned resource, then the **Due date** is the date for resolving the issue. • If the issue is not assigned to any resource, then the **Due date** is the date when the issue must be closed or addressed.
Assigned to	Primary resource assigned to work on the issue resolution.
Parent	Project to which this issue belongs.
Show on project status report	Option to specify whether the issue information should be included in the project status report.
Short description	Brief description of the issue and its potential impact on the success of the project. As you start entering the title for your issue, related issues that potentially match your issue are displayed. Click the suggestion icon ( ) to select from the list of predefined issue descriptions.
Description	Details of the issue and its potential impact.
Work notes	Information to record and track the work accomplished for resolving the issue.

Project form of Project Workspace

Learn about the fields on the project form of the Project Workspace. Use this form to create a project.

Project form

Field	Description
Project Name	Preferred name of the project.
Planned start date	The date that you plan to start the tasks for this project.
Project class	Select the type of project that you want to create. For example, a regular project, customer project, or TeamSpace project.
Project template	Template to apply for your project.

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Field	Description
	If the template you need is not available in the list, you can create it later and apply to your project.

Request change form on Project Workspace

Learn about the fields on the Request change form of the Project Workspace. Use this form to add a change request to your projects.

Request change form

Field	Description
Number	System-generated ID number with a configurable prefix.
State	Current state of the request change. All new request change records are created in the Open state. The available states are: • Pending • Open • Work in Progress • Closed Complete • Closed Incomplete • Closed Skipped
Priority	Urgency for approving the requested changes based on impact.
Estimated Cost	Estimated cost generated by the requested changes.
Impact	Impact on the outcome of the project if you do not approve the requested changes.
Approval	Status of approval from the stakeholders for the requested changes.
Assigned to	Primary resource assigned to work on the request change.
Due date	Requested date to complete the request change.
Category	Entity for which you are creating the request change. The options are: • Resource • Scope • Cost • Schedule
Parent	Project number to which this request change belongs.
Show on project status report	Option to specify whether the request change information should be included in the project status report.
Title	Title for the change request.
Description	Details of the request change and its potential impact.

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Request change form (continued)

Field	Description
Business Justification	Reason for requesting the proposed change in the project and its impact on the business.
Work notes	Additional information to indicate progress on the project request change.

Risk form of Project Workspace

Learn about the fields on the Risk form of the Project Workspace. Use this form to add risk to your projects.

Risk form

Field	Description
Number	System-generated ID number with a configurable prefix.
State	Current state of the risk. All new risks are created in the Pending state. The available states are: • Pending • Open • Work in Progress • Closed Complete • Closed Incomplete • Closed Skipped
Risk status	Status of the risk. The available options are: • Pending • Achieved • Not Achieved • Avoid • Mitigate • Transfer • Accept
Probability	The likelihood that the event described in the risk may occur. The available options are: • Absolute • High • Moderate • Low
Impact	Impact of the risk event on the outcome of the project.

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Risk form (continued)

Field	Description
Estimated cost	Estimated cost generated by the risk event.
Risk rank	A value and color assigned to the risk. This value is calculated using risk probability and impact. You can configure the color and value using the Risk Value Lookup. For more information, see Configure custom Risk rank and Risk value for a project.
Risk owner	Primary resource who is responsible for monitoring and managing the risk.
Assigned to	Primary resource assigned to work on the risk.
Risk value	A value calculated from the Risk Value Lookup. For more information, see Configure custom Risk rank and Risk value for a project.
Due date	Requested date for one of the following situations: • If the risk has an assigned resource, then the **Due date** is the date for resolving the risk. • If the risk is assigned to any resource, then the **Due date** isn't the date when the risk must be closed or addressed.
Show on project status report	Option to specify whether the risk information should be included in the project status report.
Task	Project to which this risk belongs.
Short description	Brief description of the event and its potential impact on the success of the project. If the risk is created from the risk library, then this field displays the **Risk Statement** name.
Description	Details of the event and its potential impact. If the risk is created from the risk library, then this field displays the Risk Statement short description.
Actual cost	Cost generated by the risk event. This information gets added when and if the event occurs.
Mitigation plan	Brief description of efforts taken to mitigate the risk.

Note:
The Risk Assessment Summary section only appears when the *`Enable Advanced Risk PPM Integration`* property is enabled.

Risk Assessment Summary section of the Risk form

Field	Description
Inherent risk	This field gets auto-populated with the risk scores when the risk assessor evaluates the inherent risk.

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Risk Assessment Summary section of the Risk form (continued)

Field	Description
Elevated to enterprise risk	This option gets selected automatically when the risk is elevated to enterprise risk by the project manager.
Residual risk	This field gets auto-populated with the risk scores when the risk assessor evaluates the residual risk.
Enterprise inherent risk	This field gets auto-populated with the risk scores when the risk assessor assesses the enterprise inherent risk.
Enterprise residual risk	This field gets auto-populated with the risk scores when the risk assessor evaluates the enterprise residual risk.

Resource assignment form

Use this form to create resource assignments from Project Workspace.

New Resource Assignment form

Field	Description
Assignment type	Select an assignment type from the list. • User - to create a resource assignment for a user. • Group - to crate a resource assignment for a group.
Resource	Name of the resource. This field is disabled for Group assignment.
Group	Name of the group to create resource assignment. If a resource is selected, the primary group name is populated by default.
Role	Primary role for the employee. • If a resource is selected, the primary role is populated by default. • This field is disabled for Group assignment.
Skill	Primary skill of the resource. • If a resource is selected, the primary role is populated by default. • This field is disabled for Group assignment.
Effort type	Select the effort type to request a resource.

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New Resource Assignment form (continued)

Field	Description
	• Hours - to request a resource or group by hourly basis. • FTE - to request a resource or group by FTE. By default, one FTE is 8 hours. • Person days - to request a resource or group by Person days.
Effort	Enter the required effort count.
Name	Enter a custom name for resource assignment.
Task	Select the task from the list to associate the resource assignment.
Start date	Select the start date of the assignment using the calendar palette.
End date	Select the end date of the assignment using the calendar palette.
Resource status	Select the state of the resource assignment. • Pending • Approved • Unapproved • Unassigned
Rate override	Select this option to override the resource rate to match with your organization requirements.
Resource rate	Select the required currency and enter the resource rate.
Ready for review	Select an option from the list so that the resource manager can review the request for allocation. • Yes - if the resource assignment request is finalized and ready for resource manager's review for allocation. • No - if the resource assignment details are still being updated.
Notes	Enter details about the assignment to help resource manager or project manager with insights and additional information.

Create cost plan form

Use this form to create cost plans for your planning items.

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Create cost plan form

Field	Description
Name	Name of the cost plan.
Entered currency	Currency to capture the unit cost value.
Unit cost	Planned cost for the cost plan.
Quantity	Quantity of cost plans.
Total planned cost	Total planned costs value of the cost plan.
Start fiscal period	Starting month in a fiscal period for the cost plan.
End fiscal period	Ending month in a fiscal period for the cost plan.
Cost distribution	Allocate planned cost by fiscal period or duration. Select a value from the list. • **Split equally across fiscal periods** - Distributes the cost equally among all the fiscal periods across the duration. • **Recurring per fiscal period** - Recurs the cost for each fiscal period across the duration.
Cost type	Cost type of the cost plan. Select a cost type form the list. **Note:** Based on the selected cost type, the **Role** and **Product model** fields appear.
Employee type	Read-only field. • **External** if Cost type is External labor Capex or External labor Opex. • **Internal** if Cost type is Labor Capex or Labor Opex.
Role	Name of the role to expense the cost plan.
Product model	Available if the Cost type is Software, Hardware, or Other Capex or Opex. Select a model from the list to expense the cost plan. Model name of a hardware expenditure to expense the cost plan.

Create expense line form

Use this form to create expense lines for your actual expense.

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Create expense line form

Field	Description
Number	Auto-generated number for the expense line.
Amount	Expense incurred.
Short description	Short description of the expense. Mention unique and specific details to identify the expense line.
Date	Date of the expense.
Process date	Processed date of the expense.
Cost plan	Associated cost plan name for recording the expense line.
Cost type	Cost type of the expense. by default, the cost type of the cost plan is selected.
State	State of the expense line. Only processed expense lines are considered for an investment entity.
Expense type	Defines the expense type, internal or external. By default, the expense type is considered from the **Cost type** field entry.
Rate card	Name of the rate card.
Summary type	Business purpose of the expense line.

Create status report form

Learn about the fields on the Create status report form of the Project Workspace. Use this form to create a new status report according to your requirement. The following are the heads in a report created using the Default status report template. A report created using the One-page status report template has fewer information heads.

Create status report form

Field	Description
Status report name	Unique name for the report that describes its purpose clearly.
Status Date	Date of the report.
Overall health	Current overall health and status of the project.
Executive summary	Concise summary of the project's status, highlighting key accomplishments, challenges, and decisions.

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Create status report form (continued)

Field	Description
Comments	Additional information or observations that are important for tracking.
Last week's achievements	List of key milestones or tasks that were completed in the previous week to show progress.
Key activities planned	Main tasks or milestones planned for the upcoming week to provide visibility into future efforts.
Schedule	Indication for whether the project is on track according to its planned timeline.
Comments on schedule	Comments about any deviations from the planned schedule.
Cost	Current project costs.
Comment on cost	Comments about any deviations from the planned budget, such as overspending or cost savings.
Resources	Resources allocated to the project. Confirming if the resources are sufficient and appropriately utilized.
Comments on resources	Comments about the use of resources, including any shortages, excesses, or adjustments needed.
Scope	Indication for whether the project scope is undergoing any changes.
Comments on scope	Observations or explanations about changes to the project's scope, including how they might affect the project.

Related topics

Create a status report in Project Workspace

Create new document template form

Learn about the fields on the Create new document template form of the Project Workspace. Use this form to create a new status report template according to your requirement.

Create new document template form

Field	Description
Name	Unique name for your template.
Category	Category for the template. Search and select **Project status report**.
Description	Type in a description for your template.
Visibility	Visibility of the template.

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Create new document template form (continued)

Field	Description
Owner	Owner of the template.
Icon	Icon for the report. Select an icon file, which appears in the window along with the template you're creating. This file appears in the header of the status report.
Is dynamic	Option to insert dynamic project data in the status reports created using this template.
Attachments	Attachments to the template.

Related topics

Create a status report template in Project Workspace

Project workspace classic - Legacy

Define, plan, track, and monitor your projects from a single location. View status reports and KPIs to take further actions for the project.

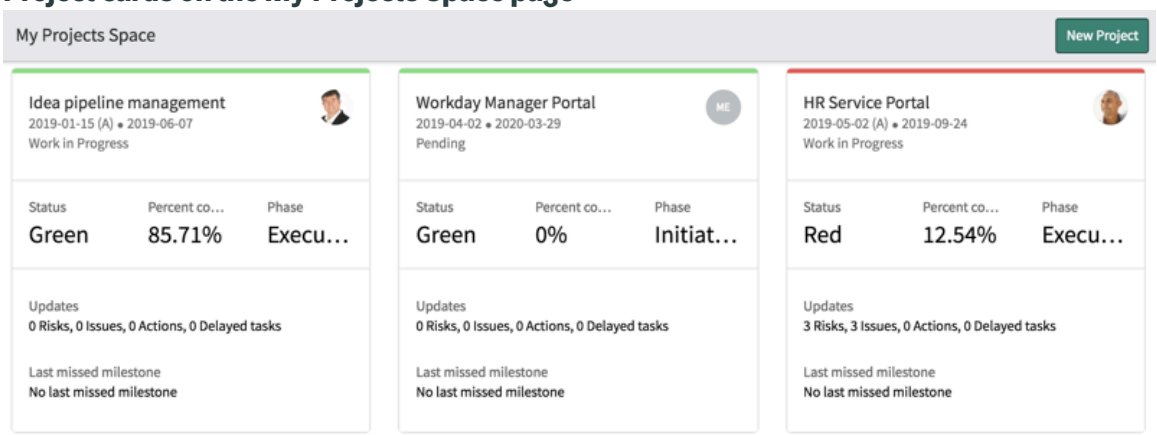
Important:

Classic Project Workspace is being prepared for future deprecation. It will be hidden and no longer available for installation but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base. Use new Project Workspace with enhanced UI to help you efficiently manage your projects.

Projects in the My Projects Space page

The project workspace overview page — **My Projects Space** — displays projects as cards based on filter criteria. A maximum of the 200 most recently updated projects appear on the page. Clicking a card opens the project in the project workspace. You can configure the information that is displayed on a card.

Project cards on the My Projects Space page



The components of the workspace are:

Banner icons

The following banner icons are available in project workspace:

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Home

The home icon () enables you to return to the list of project cards on **My Projects Space** page.

Project choice list

The choice list displays the projects that you can select to open in project workspace. The projects in the choice list appear based on the filter criteria applied in **My Projects Space** page.

Project checklist

The checklist icon () helps you to build the checklist of activities that must be completed in a project.

Tabs in the project workspace

The project workspace comprises of the following tabs described at a high level:

Analytics

The **Analytics** tab provides analytics on project aspects such as open risks, open issues, and delayed milestones.

Details

The **Details** tab opens the project form and enables you to define important aspects of the project.

Planning

The **Planning** tab opens the project in the planning console. The tab also enables you to navigate to Project workbench and track your project in the workbench.

Resources

The **Resources** tab enables you to find resources, and create and manage the resources plans for the project and project tasks. The tab is available only to a project manager.

Financials

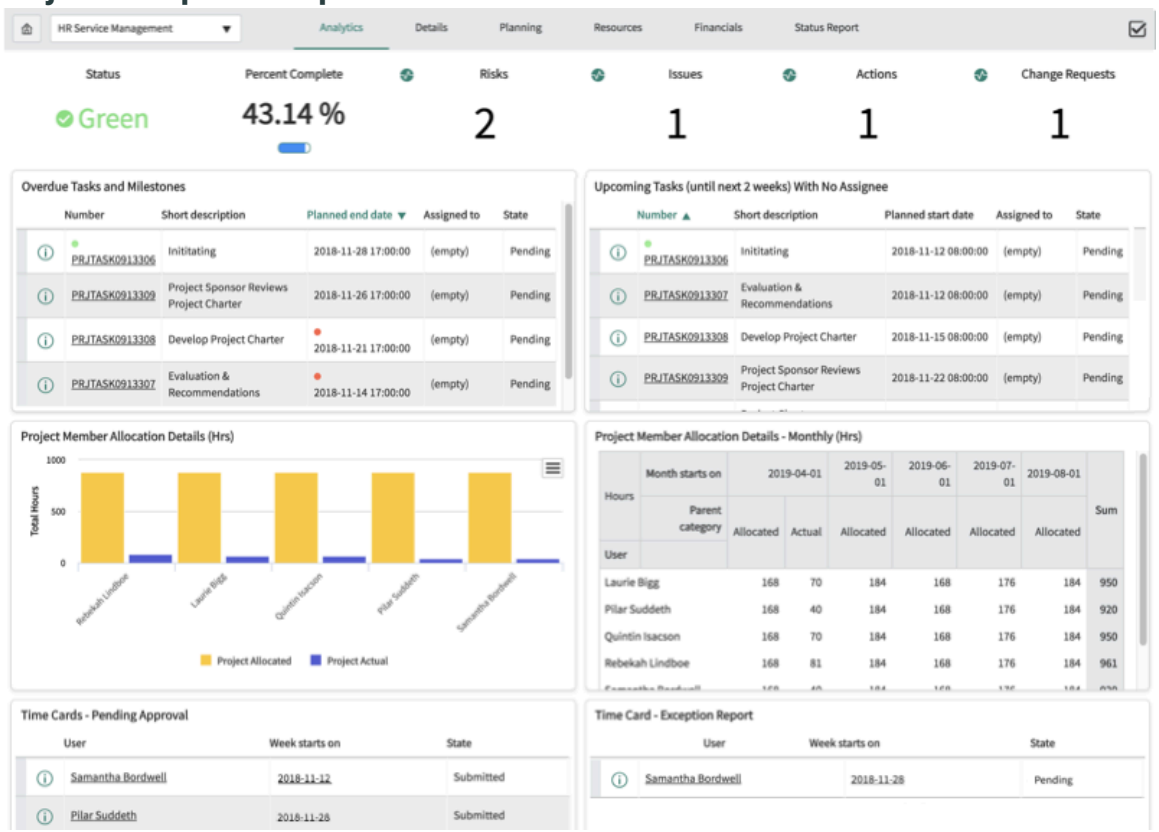
The **Financials** tab displays breakdowns of cost components of a project: planned cost, estimated returns, allocated budget, cost plans, and benefit plans. You can create baselines and compare baselines from this tab to track changes occurring during execution of project or demand.

Status Report

The **Status Report** tab displays the project status reports.

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Project workspace example



Access the classic Project Workspace

Open the project workspace to display all your projects at a single location.

Important:

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Before you begin

Role required: it_project_user or it_project_manager

Procedure

1. Navigate to **All** > **Project** > **Projects** > **Project Workspace** to open **My Projects Space** page.
2. In the **My Projects Space** page, add filter criteria to display the required projects as cards.

Note:
You can configure the information which is displayed on a card.

3. Click a project to open it in project workspace.
4. Click the required tab in project workspace to work in it.

Configure parameters displayed on project cards in classic Project Workspace

Configure the parameters that are displayed on a project card in **My Projects Space** page of classic Project Workspace. A card shows the project summary so that project managers can quickly gauge project status and health by looking at the card.

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Before you begin

Role required: it_pps_admin

About this task

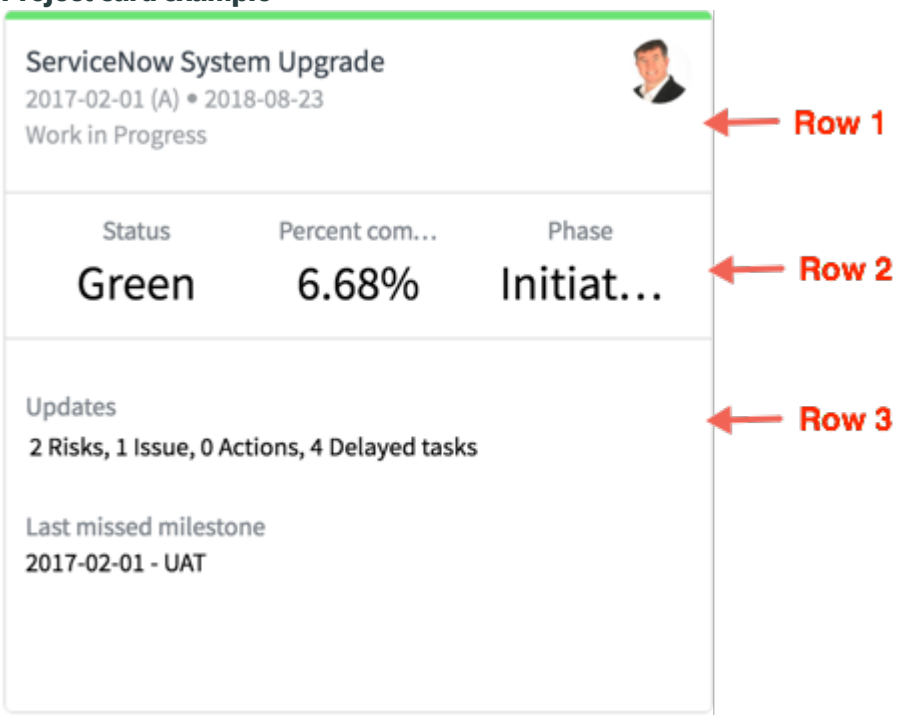
The project workspace overview page **My Projects Space** displays the projects as cards based on the filter criteria. The cards have a color band at the top. The color of the band is based on the **Status** field in the respective project record. Each card further displays the following information 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 columns from project [pm_project] table. The number of displayed columns in this row is fixed to 3, but the columns to be displayed can be configured in [pm_home_page_config] table.
- Row 3 displays the following project information based on the current state of the project.
  - Open risks, open issues, actions, and overdue tasks of the project under **Updates** heading.
  - Date and short description of the last missed milestone task under **Last missed milestone** heading.

  The parameters displayed are derived from the records in [pm_home_page_card] table. In [pm_home_page_card] table, each project state is assigned some parameters to be displayed.

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Project card example



You can configure the information which is displayed in row 2 and row3 on a card.

Procedure

1. Navigate to **All** > **Project Administration** > **Project Workspace**.
2. Select a table for which you want to change the card configuration, for example, select `Project[pm_project]`.
3. Set the display columns for row 2 of the card in PM Home Page Configuration [pm_home_page_config] table.
   a. Select the columns to be displayed in **Column-1**, **Column-2**, and **Column-3** fields.
   b. Click **Update**.
   The selected columns appear in row 2 of the project cards.
4. Set the parameters for row 3 of the card in PM Home Page Card [pm_home_page_card] table.
   In [pm_home_page_card] table, each project state is assigned the parameters that are required to be displayed on a project card in third row.
   a. Click **New** in **PM Home Page Card** related list.
   b. On the form, fill in the fields.

PM Home Page Card form

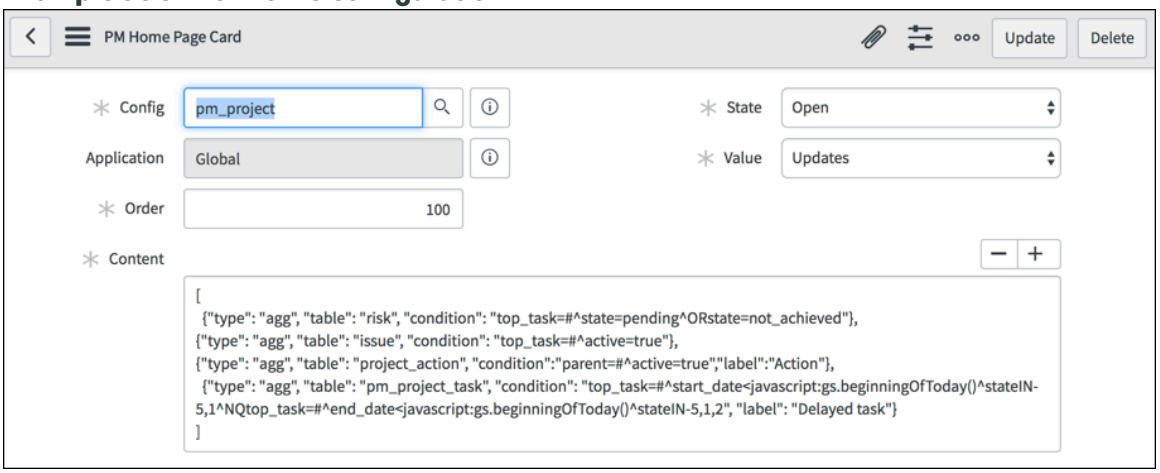
Field	Description
Order	Position at which the parameter appears in row 3 of the card.
State	Project state for which the parameter needs to be added.
Value	Section to be displayed for the selected state in row 3 such as **Updates** and **Last missed milestone**.

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Field	Description
Content	JSON field to add the parameters to be displayed under the selected section for the selected state.

The following screenshot shows a JSON example of adding Risks, Issues, Actions, and Overdue tasks parameters under **Updates** heading for Open state.

Example JSON for Row 3 configuration



c. Click **Submit**.

Note:
Use the same steps to change a display parameter assigned to a state.

The parameter is added or updated for the selected state. It appears under selected section in row 3 on the project cards for the state it was added.

View project analytics in classic Project Workspace

View the summary of a project in **Analytics** tab of classic Project Workspace.

Important:

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Before you begin
Role required: it_project_user

About this task
The **Analytics** tab is a PA 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 information in the reports is rolled up from the project form fields. For information about various widgets and reports for different project types, see Project analytics widgets and reports

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Procedure

1. Open the required project in Project Workspace.
2. Click the **Analytics** tab to display its contents.
3. Review the displayed reports and take necessary actions, if required.

Project analytics widgets and reports

Widgets and reports that provide information for the project summary in the **Analytics** tab of the project workspace for Agile, Waterfall, and Hybrid projects.

Important:

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Project widgets and reports

Widgets and reports provide information that enables you to view and track the progress of your Agile, Waterfall, and Hybrid project.

Note:
You must have the Agile Development 2.0 plugin installed to view the widgets and reports for your Agile and Hybrid projects.

Your system administrator can configure the widgets and reports in the dashboard to display project information on the **Analytics** tab. The following dashboards are available:

Project Execution Type	Dashboard Displayed	Description
Hybrid	Project Summary – Hybrid	Contains reports and widgets for hybrid projects.
Agile	Project Summary – Scrum	Contains reports and widgets for agile projects.
Waterfall	Project Summary – Waterfall **Note:** This dashboard was previously known as Project Manager Summary Dashboard.	Contains reports and widgets for waterfall projects.

The project execution type determines the dashboard displayed on the **Analytics** tab.

You can also embed a custom dashboard in the **Analytics** tab. Your system admin can modify the *PMViewDataUtils* script include and configure the variable value for the *dashboards_tabs* in the *getDashboardUrl* method. As a result, you can view the custom dashboard in Project Analytics. For example:

```
var dashboards_tabs =

      {
```

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```
            waterfall: {
                            dashboard_sysId:
'5d4959dd878003008b9b3a0548cb0bd0',
                            tab_sysId:
'1d99d5dd878003008b9b3a0548cb0bbd'
                                },
            hybrid: {
                            dashboard_sysId:
'96dc46c78700330047d84c2c59cb0bf1',
                            tab_sysId:
'520d4ac78700330047d84c2c59cb0bab'
                                },
            agile: {
                            dashboard_sysId:
'f3dd4ec78700330047d84c2c59cb0b93&tab',
                            tab_sysId:
'52fd8ec78700330047d84c2c59cb0bae'
                                },
            any_other_executionType: {
                            dashboard_sysId:
'custom_dashboard_sys_id',
                            tab_sysId:
'custom_dashboard_tab_sys_id'
                                },
        };
```

The following widgets and reports for all project types are provided in the **Analytics** tab to help the project manager analyze the project.

Widgets and reports for Agile project

Name	Description
Stories Missing Acceptance Criteria	Number of stories in the project without acceptance criteria information.
Stories Missing Points	Number of stories in the project with the **Points** field blank.
Stories Acceptance Overdue	Number of stories in the project that are not in the Completed or Cancelled state after the sprint end.
Team-wise Sprint Status	Track the sprint-wise status of various scrum teams across the release. Click the team name to view sprint details.
Stories by State	Donut chart showing the number of stories in different stages of development such as Draft, Ready, and WIP. Click the appropriate state to view details of the stories.
Progress by Points	Track the progress of the project based on points. You can group and stack stories based on any combination of Epic, Assignment group, and State.
Progress by Stories	Track the progress of the project based on the number of stories. You can group and stack

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Widgets and reports for Agile project (continued)

Name	Description
	stories based on Epic, Assignment group, and state.

Widgets and reports for Waterfall and Hybrid project

Name	Description
Issues	Number of issues in the Pending, Open, and Work In Progress states included in the project.
Actions	Number of action items in the Pending, Open, and Work In Progress states for the project.
Change Requests	Number of change requests in the Pending, Open, and Work In Progress states for the project.
Stories by State	Pie chart showing the number of stories in different stages of development such as Draft, Ready, and WIP. Click the appropriate state to view the details for the stories. **Note:** This widget is applicable for Hybrid projects only.
Tasks by State	Donut chart showing the number of project tasks in different stages of development such as Pending, Open, Work In Progress, and Closed Complete. Click the appropriate state to view the task details.
Project Member Allocation Details (Hrs)	Stacked bar chart showing allocated and actual hours of the resources assigned to the project.
Project Member Allocation Details — Monthly (Hrs)	Pivot chart showing the monthly allocated and actual hours for the resources assigned to the project.
Task Assignments	Track the state of various project tasks across the release based on the assigned users or group. Click the user or group name to view the details of the assigned tasks.
Resource Plans by State	Donut chart showing the number of resource plans grouped according to their current state.
Overdue Tasks and Milestones	List of overdue project tasks and milestones, which are the tasks that satisfy either of the following conditions in the Project Task [pm_project_task] table:

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Widgets and reports for Waterfall and Hybrid project (continued)

Name	Description
	• The value of the **Planned start date** is before today's date and the **State** value is Open or Pending. • The value of the **Shadow** field is set to false.
Upcoming Tasks (next 2 weeks) with no assignee	List of unassigned Open or Pending project tasks that are planned to start 14 days from the current date.

Common widgets

Name	Description
Phase	Current state of the project such as Initiating or Planning.
Status	Color indicator that signifies the status of the project.
Percent Complete	Percentage of the project that has been completed.
Time Elapsed	Amount of time that has passed while working on the project from the actual start date to the planned end date. If the project is in the Open or Pending state, then the time elapsed is calculated based on the Planned start date and the current date.
Risks	Number of risks in the Pending, Achieved, and Not Achieved states concerning the project.
Cost Trend Analysis	Line graph showing a comparison between the planned costs and actual costs on a monthly basis.
Monetary Benefit Trend Analysis	Line graph showing a trend of planned financial benefits on a monthly basis.
Non-monetary Benefit Plans	Breakdown of the number of non-monetary benefit plans for active projects along with its associated benefit plans.
Non-monetary Planned vs Actual Benefits	Comparison of total planned and actual non-financial benefits for active projects grouped by fiscal period.
Confirmed vs Allocated vs Actual Hours	Comparison of total confirmed, allocated, and actual hours for the project.
Time Cards — Pending Approval	Time cards for the selected project that are submitted but not yet approved.
Time Card — Exception Report	List of users who did not submit their time cards for the selected project, and time cards

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Common widgets (continued)

Name	Description
	that are not yet approved for the selected project. The exception report is generated for users who are assigned to a task in progress, or hard-allocated to the project or task.

Define a project in classic Project Workspace

Define important aspects of the selected project such as duration, estimated cost, and the net value to the organization in classic Project Workspace.

Important:

Classic Project Workspace is being prepared for future deprecation. It will be hidden and no longer available for installation but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base. Use new Project Workspace with enhanced UI to help you efficiently manage your projects.

Before you begin

Role required: it_project_user

About this task

The **Details** tab in project workspace displays the project form for the selected project.

Procedure

1. Open the required project in Project Workspace.
2. Click the **Details** tab to display the project form.
3. Edit the project record as required.

Plan a project using planning console in classic Project Workspace

Perform the project planning such as create project schedule, make resource assignments, create baselines, and view critical path, using planning console in the classic Project Workspace.

Important:

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Before you begin

Role required: it_project_user or it_project_manager

About this task

The **Planning** tab in project workspace displays the selected project in planning console.

Procedure

1. Open the required project in project workspace.
2. Click the **Planning** tab to display the project in planning console.

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Note:
If project workbench is already open in **Planning** tab, click the **Project Workbench** selection arrow on the banner and select **Planning Console**.

3. Plan the project using planning console features such as WBS hierarchy and Gantt chart. You can also perform several tasks on the planning console that you can perform on lists and forms, such as creating project tasks.

Track a project using project workbench in classic Project Workspace

As a project manager, track and manage a project in Project Workbench.

Important:

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Before you begin

Role required: it_project_manager

About this task

You can use the **Planning** tab in project workspace to displays the selected project in project workbench.

Procedure

1. Open the required project in project workspace.
2. Click the **Planning** tab.
3. To display the project in project workbench, click the **Planning Console** selection arrow on the banner and select **Project Workbench**.
4. Track and manage all aspects of the project using project workbench.

Create and manage resource plans for a project in classic Project Workspace

As a resource requester, find the availability of the resources, and create and manage the resource plans for the project and project tasks in the project workspace.

Important:

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Before you begin

Role required: it_project_manager

About this task

The **Resources** tab in project workspace shows the resource plans for the selected project in an editable grid view. The tab consists of the following sections:

Resource grid

It is the top section on the page that enables you to:

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- Create resource plans for the project or its tasks. You can create a resource plan at a group, role, or user level.
- View and manage all the resource plans for the open project and its tasks in one place.
- View resource allocations for each resource plan in a grid view.

Use the grid view in the tab to:

- Edit the planned and allocated hours inline without opening the record in a form.
- Group, hide, or show columns as per your requirement.
- Hide cancelled or completed resource plans.
- Request, confirm, or allocate a resource plan.
- Move a resource plan and its allocations to a future date for a group, role, or user resource plan.
- Replace a user with another user for a group, role, or user resource plan to accommodate situations like a user taking leave during a project.
- Request extension of an allocated resource plan.
- Shift allocation of a user to a future date for a group or role resource plan.
- Identify the resource plans created with specific members preference by viewing the **Resource plan created with specific members** icon ( ) next to the resource plans.

Resource Finder

The section is available at the bottom of the page. The section is hidden by default. It can be made visible by clicking the resource finder icon ( ) in the top right of the page. It enables you to:

- Search the resources and view their availability. You can search the resources by group, role, or user.
- Add resource plans for the searched resources to the project and its tasks.
- Search for resources and view their availability and utilization. You can search resources by group, role, or user.
- Add or confirm resource plans for the current resources.
- Configure the Actuals column using Detailed View.
- Filter resources in the Resource Finder by available, overallocated, or all resources.
- Identify resources that are created as specific members for a resource plan by viewing the **Member specified in the resource plan** icon ( ) next to the resources.
- View the Resource Availability and Resource Capacity grids by clicking on a capacity or availability column.

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- View the user and resource allocation details in a pop-up window by selecting the **User** and **Allocated Hours** columns respectively in the **Resource Availability** grid.

- **Note:**
  The allocated values are displayed in the Hours, FTE, or Person Days fields based on the selection made in the Allocation Workbench.

When you select a resource plan in the resource grid section, the availability details of that resource are displayed in the resource finder section. For example, if a group resource plan is selected, the availability details of the group and its members are displayed in the Finder section. When you change the selection, the finder is automatically updated based on the current selection.

Procedure

1. Open the required project in project workspace.
2. Click the **Resources** tab.
   - To create a resource plan, click **New**.
   - To view the allocations in weekly or monthly format in the grid, click **Week** or **Month** button. The selected option changes the grid view in both the resource grid and resource finder sections.

     The time duration in the grid is displayed based on the earliest start date of the project or resource plans, and the last end date of the project or resource plans.
   - To view the allocations in hours, FTE, or person days format in the grid, click **Hours**, **FTE**, or **Person Days** option in the list. The selected option changes the grid view in both the resource grid section and resource finder section.
   - To search the resources and create a resource plan for them, click the resource finder icon ( ).
   - To show or hide certain columns from the grid view, click the configuration icon ( ). Hiding or displaying an item column does not update the table. Grouped columns cannot be hidden.
   - To view the resource allocations at user level, expand a resource plan in the grid. The user level allocations are listed only for Group and Role resource plans.
   - To edit the planned and allocated hours inline in the grid, double-click a row. You can update the planned hours for future period for resource plans in Requested, Confirmed, and Allocated state.
   - To view and update resource plan details in a form, click the information icon ( ) in the beginning of the resource plan row.
   - To request a resource plan in the **Actions** column, click the actions icon ( ) and select **Request**.

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- To delete a resource plan in the **Actions** column, click the actions icon (⋮) and select **Delete**.
- To request all the resource plans created for the project in the **Actions** column, click the actions icon (⋮) in the project row and select **Request All**. The icon is enabled when at least one of the listed resource plans for the project is in the Planning or Rejected state.

For more information on different options available on the **Actions** menu, see the Manage resources by using the allocation workbench topic.

View forecasts and manage financial plans for a project in classic Project Workspace

Use the **Financials** tab in Project Workspace to capture the costs and benefits of a project.

Important:

Classic Project Workspace is being prepared for future deprecation. It will be hidden and no longer available for installation but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base. Use new Project Workspace with enhanced UI to help you efficiently manage your projects.

Before you begin

Role required: it_project_manager

About this task

The **Financials** tab provides a detailed breakdown of the cost components of a project. The total planned cost, budget cost, actual cost, and planned returns with their breakdowns are displayed in the form of read-only cards, while the cost plans, benefit plans, and their breakdowns are provided in an editable grid view. Using the grid view, you can:

- Group the plan level columns; configure, sort, expand, collapse, and freeze both the plan level and breakdown columns.
- Inline edit the breakdown values of a cost plan or benefit plan without opening the plan in a form. Inline edit is available only in the Monthly view.
- Create a cost plan and benefit plan for the project.

Procedure

1. Open the required project in project workspace.
2. Click the **Financials** tab.
3. To create a cost plan:
   a. Select **Cost Plans** from the list.
   b. Click **New**.
4. To create a monetary benefit plan:
   a. Select **Monetary Benefit Plans** from the list.
   b. Click **New**.
5. To view the project costs and financial breakdown summary of a project for the selected fiscal year, select **Overview** from the list.
   The **Overview** tab gives the financial summary for Planned Cost, Actual Cost, Variance (Planned vs Actual cost), Estimate At Completion, and Estimate To Completion.

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Note:
If a project has a sub-project with a cost plan, the financials overview breakdown view is not enabled by default. To enable this view, a user with the it_pps_admin role should set the value of the **com.snc.project.rollup.cost** property to **true**.

- You can manage the financial summary view on the **Overview** tab.

  a. Navigate to **All** > **System Definitions** > **Script Includes**.

  b. Search for and select the **PmOverviewTabConsts** script.

  c. Rearrange or remove the code from the **Script** and click **Update**.

  You can drag the headers and drop them at the required position to rearrange the financial summary columns on the **Overview** tab. This arrangement resets after the current session ends or expires.

- The admin can configure the level at which the financials overview data is displayed for the fiscal year in the **Project related properties** page by navigating to **Project Administration** > **Settings** > **Preferences - Project**. If no value is specified, by default, the financials are displayed at the quarterly breakdown.

6. **Optional:** Review additional fields, view plan details, or reorganize the comparative data on the form.

   - To create a baseline or compare the available baselines, click the baseline information icon ( ) and then select **Create New Baseline** or **Compare Baselines** option, respectively.

     In the Financial Baseline comparison screen, the top two rows show all the values in either functional currency or project currency. To display the values in project currency, click the configuration icon ( ) and toggle the Show Widgets in Project Currency view.

     The Financial Baseline Details pane indicates the Functional Currency and the Project Currency that has been selected.

     The Financial Baseline grid shows the Functional cost, Cost in Project currency, Actuals, and Actuals in Project Currency. You can view the Project currency at the grid level. This view is helpful when there are cost plans of sub-projects that are in different project currency.

   - To view a cost plan or benefit plan details on a form, click the information icon ( ) available in the Name column of the grid.
   - To view a cost plan or benefit plan details in yearly, quarterly, or monthly format, click the **Year**, **Quarter** or **Month** views respectively.
   - To toggle viewing the widgets in the Financial Summary section, click the widgets icon ( ) and then select the **Show Widgets** option.

     Select an individual widget name to display the widget. Clear the selection to hide the widget.

     The selected field preferences are saved and are available when you reopen the **Financial** tab.

   - To show or hide columns in the grid, click the configuration icon ( ) and select the field names.

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You cannot hide the grouped columns. To reset to the default grid column layout, select the **Reset to defaults** option.

- To view the project costs in project currency, click the configuration icon () and select the five widgets to show project currency amounts. The widgets are Total Planned Cost in Project Currency, Budget Cost in Project Currency, Actual Cost in Project Currency, Planned Return in Project Currency, and Benefit in Project Currency.

  You can view both the functional and project currencies in the currency indicator.

  In the Financial Summary grid view of the **Cost Plans** and **Benefit Plans** tabs, all items related to project currencies are configured in the column heads such as **Cost in project currency**, **Project currency**, and **Total actual cost in project currency**.

  By default, you can view only the functional currency columns. To view the project currency columns, click the configuration icon () and select the project currency column check boxes in the item columns.

  The aggregated amount in the **Cost in project currency** field is clear if there are cost plans of sub-projects with different project currency.

Configure a widget for project financial metrics

Configure a widget to view and track the financial metrics of a project on the **Financials** tab of the Project Workspace page.

Important:

Classic Project Workspace is being prepared for future deprecation. It will be hidden and no longer available for installation but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base. Use new Project Workspace with enhanced UI to help you efficiently manage your projects.

Before you begin

Role required: pps_admin

Procedure

1. Navigate to **All** > **Project Administration** > **Widgets**.
2. Click **New**.
3. On the form, fill in the fields.

Widget form

Field	Description
Name	Unique name for the widget.
Scripted	Option for indicating the value on the widget is from a code script. By default, this option is selected and is read-only.
Show Label	Option for displaying either the label or the color indicator. If you clear the check box, the **Color** field appears and you can set the color.
Active	Option for indicating the status of the widget.

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Field	Description
	Only active widgets can be shown on the **Financials** tab of the Project Workspace.
Parent widget	Widget that is the parent of the current widget. The current widget displays in the Child widgets related list of the selected widget. You can add a maximum of three child widgets for a parent widget.
Formatter required	Option for specifying whether a currency formatter is required for the widget.

Script	Code script that returns a requested metric value that is displayed on the widget.
	
	In the script, use the context and filter objects. The context object contains all of the project financial fields, such as capex_costs, opex_costs, and budget_cost.
	
	The following sample script returns the Estimate At Completion metric value of a project to appear on the widget.
	`var context = JSON.parse(context);`
	`var filter = context.filters;`
	
	`var now_GR = new GlideRecord('pm_project');`
	`gr.addEncodedQuery(filter['pm_project']);`
	`gr.query();`
	`if(gr.next())`
	`gr.getValue('forecast_cost');`
	`Collapse`

Short description	Description of the widget.

What to do next

Associate the widget to the Project table.

Associate a widget to the Project table

After you configure a widget, associate it with the Project table to show the financial data of a project.

Important:

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Before you begin

You should configure a widget before you can associate it with the Project [pm_project] table.

Role required: pps_admin

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Procedure

1. Navigate to **All** > **Project Administration** > **Widgets**.
2. Open a widget to associate with the Project table.
3. In the Widget associations related list, click **New**.
4. On the form, fill in the fields.

Widget association form

Field	Description
Association ID	Record to associate to the widget. To access the relevant records, you must select the Tables [sys_db_objects] table in the **Table name** list and the Project [pm_project] table in the **Document** list.
Association table	Table to associate to the widget. You must select Table [sys_db_objects] from the list.
Widget	Unique name of the widget.
Order	Position of the widget in relation to other widgets in the **Financials** tab of the Project Workspace. Widgets appear in numeric order with the smallest number listed first.
Display on card	Option to display the widget in the **Financials** tab.
Include by default	Option to show the widget by default in the **Financials** tab.

Request funds for a project in classic Project Workspace

Request funds for your project investment to work on project activities and meet the business goals.

Important:

Classic Project Workspace is being prepared for future deprecation. It will be hidden and no longer available for installation but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base. Use new Project Workspace with enhanced UI to help you efficiently manage your projects.

Before you begin

You can request funds for your project if the following conditions are true:

- The Investment Funding (com.snc.investment_funding) plugin is activated.
- The funding entity for Project is available and is active.

Role required: it_project_manager

About this task

If you have added cost plans to your project, you can refer the total planned cost displayed on the column header of each period to determine the amount to request.

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Procedure

1. Navigate to **All** > **Project** > **Projects** > **Project Workspace**.
2. Click a project for which you want to review or manage funds.
3. On the Project Workspace, click the **Financials** tab.
4. Click the **Funds** tab.
   The Funds list shows funding sources if you have previously requested funds from them for your project.
5. Click the **Add New Source** link to select the funding source.
6. In the **Select a Source** pane, select one or more source investments from the list, and then click **Add Selected**.
   The specified funding source is added in the Request Funds grid.
7. In the Request Funds grid, specify the amount in the **CapEx** and **OpEx** columns under **New/ Modify Request** of the funding sources from which you want to request funds.
   The state of all updated funding sources changes to Draft or Planning, which is indicated by highlighted cells.
8. Click **Request**.
9. In the Confirm request dialog box, verify your requests and add a comment if required.
10. Click **Request**

Enter actuals spent in a project in classic Project Workspace

Enter actual spends in your project to track the fund utilization.

Important:

Classic Project Workspace is being prepared for future deprecation. It will be hidden and no longer available for installation but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base. Use new Project Workspace with enhanced UI to help you efficiently manage your projects.

Before you begin

Role required: it_project_manager

About this task

When you spend funds allocated to your project to complete your project activities, record that amount as actuals to review and track your project finances.

Note:

The actuals in the project record, that is calculated from the expense lines, does not reflect into the actuals of the Funds automatically. Since your actual spends might include labor costs and other expenses, you should enter it manually against the corresponding funding source in the Funds list.

Procedure

1. Navigate to **All** > **Project** > **Projects** > **Project Workspace**.
2. Click a project for which you want to review or manage funds.
3. On the Project Workspace, click the **Financials** tab.
4. Click the **Funds** tab.

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5. In the Funds list, enter the actual amount spent in the project under the **Actual CapEx** and **Actual OpEx** columns for the corresponding funding source.

   Note:
   If you do not see the **Actual CapEx** and **Actual OpEx** columns in the list, select them from the configuration icon ( ).

Result
The entered amount is updated as actuals for the project.

View a project status report in classic Project Workspace

As a project manager, view the project status reports for a project using **Status Report** tab in classic Project Workspace.

Important:

Classic Project Workspace is being prepared for future deprecation. It will be hidden and no longer available for installation but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base. Use new Project Workspace with enhanced UI to help you efficiently manage your projects.

Before you begin
Role required: it_project_manager

About this task
From the **Status Report** tab, you can:

- View and print the status reports available for a project.
- Create a status report.
- Save time when creating a status report by copying fields from existing status reports of the project.

Procedure

1. Open the required project in project workspace.
2. Click the **Status Report** tab.
   The most recent status report created for the project is displayed.
3. To create a status report, click **Create new** button in the top right.
4. To copy an existing status report:

   a. Select a status report from the choice list that you want to copy.

   b. Click **Copy** from the choice list next to **Create new**.
   The option copies the selected status report including all fields into the new report.

   c. Click **Save**.

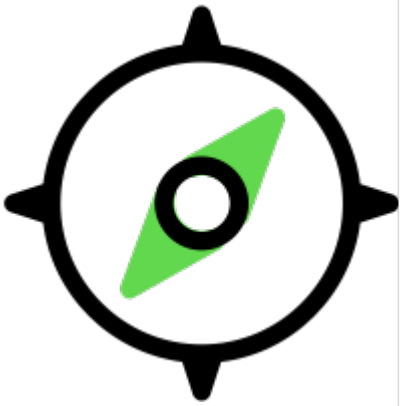
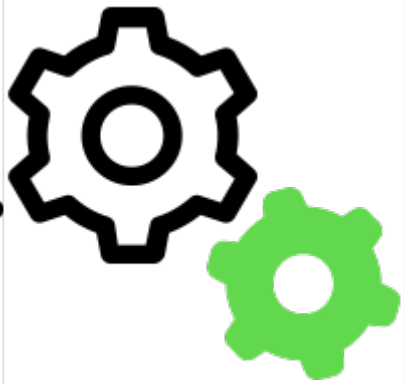
5. Select a status report from the choice list to view the contents of a status report available for the project.
   The reports are listed in the choice list by their creation date.
6. To print a status report, click the print icon ( ) in the top right.

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Resource Management Workspace

The ServiceNow® Resource Management Workspace helps Resource Managers have a centralized view of all work across all resources.

Get started

Explore	Configure	Use
		
Learn the key features and business value of Resource Management Workspace	Install the application, dependent applications or plugins	Plan and allocate resources across planning items

Troubleshoot and get help

- Ask or answer questions in the Strategic Portfolio Management forum on the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Resource Management Workspace

Learn about the features, functionalities, and business value that the Resource Management Workspace provides.

This provides a centralized view of the resource allocation and requests. As a Resource manager, you get a dedicated workspace to view the team's allocation and breakdown of the work assigned to the resources.

Resource Management Workspace provides a centralized view of the resource allocations and resource requests. This workspace eases resource management problems and is designed to cover a wider set of use cases.

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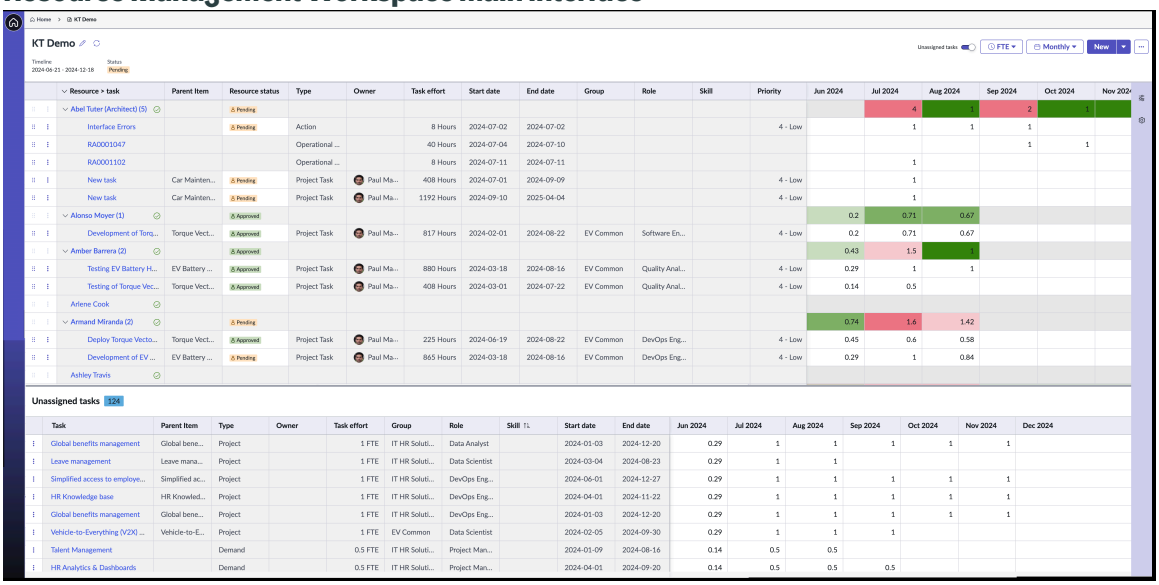
Features and benefits

Feature	Benefit
Persistent card view	Create focused view to view and work on resource allocations.
Resource allocation view	Breakdown view of resource allocations at weekly or monthly level.
Allocate the unassigned work	Filter the unassigned tasks to view and allocate the work.
Integration with Microsoft Teams	Effortlessly collaborate with the task owner for additional insights.
Approve work for resources	Move the assigned work status to Approved, Unapproved, or Pending to allocate the prioritized work.
Iconography	Identify overallocated resources and reassign to maintain allocations within the resource bandwidth.
Heatmap modals	Breakdown view of the assigned work and efforts.

Resource Management Workspace overview

The Resource Management Workspace provides a centralized view for managing resource allocations and work assignments.

Resource Management Workspace main interface



The workspace is organized into the following areas:

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- Resource board: Create filtered views to focus on specific teams, roles, or skills. For more information, see Create a resource card.
- Resource allocation view (top tray): Displays assigned work for each resource with weekly or monthly allocation breakdown and availability indicators.
- Unassigned tasks (bottom tray): Shows pending resource requests that needs to be assigned. For more information, see Assign unassigned work.

Getting started

Follow these steps to begin using the workspace.

1. Configure the workspace to enable the required features and permissions.
2. Create a resource card to define your filtered view of resources.
3. View and assign unassigned work to available resources.
4. Manage resource allocations to adjust and approve assignments.

Configure Resource Management Workspace

Configure Resource Management Workspace.

Install Resource Management Workspace

Install the Resource Management Workspace application from the ServiceNow Store.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Resource Management Workspace application using the filter criteria and search bar.

   You can search for the application by its name or ID (sn_rm_ws). If you cannot find an application, you may have to request it from ServiceNow store.
3. Click **Install**.
4. In the Application installation dialog box, review the application dependencies.

   If your application requires other applications, install them first if they are not already installed. Installing your application also automatically installs the dependent applications or plugins if they are not installed already.
5. If you want to install demo data, select **Load demo data**.
   Demo data includes sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

   Note:
   If you don't install the demo data for a store application during installation, you cannot request it later.
6. Click **Install**.

Result
The Resource Management Workspace application is installed in your instance.

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Define custom statuses for resource assignments

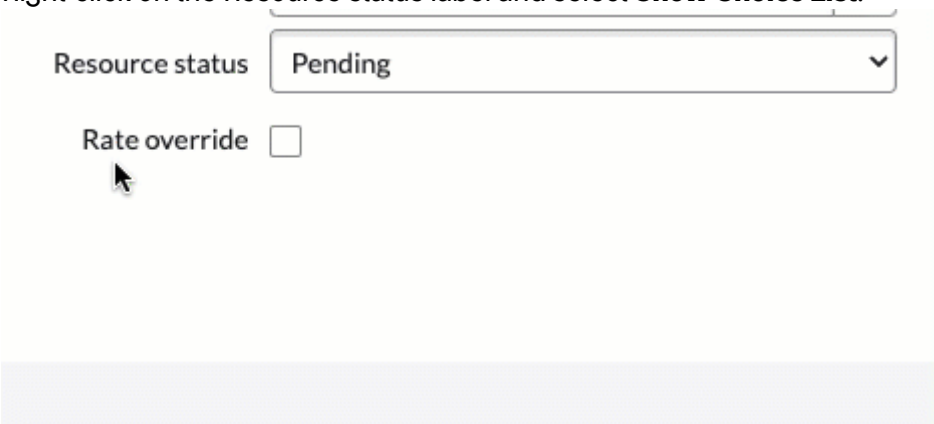
Define and assign custom statuses for resource assignments to mark the assignments based on your organization requirements.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Filter the Label field and open the **Resource Assignment** [sn_plng_att_core_resource_assignment] table.
3. Select the **Show List** Related Link.
4. Open any resource assignment from the list.
5. Right-click on the Resource status label and select **Show Choice List**.



6. Select a status field to open the record.
7. Enter the custom status label in the **Label** field and enter the value in the **Value** field.

   Tip:
   Following the naming convention (capitals) displays a consistent format in the UI.

8. Right-click on the header and select **Insert and stay**.

Important:
Selecting **Save** or **Update** overwrites the selected resource status in Step 4.

Use resource assignments

The Resource Management Workspace is presented as a new approach to assigning resources to outcomes. Resource Management Workspace integrates with Project Workspace, Strategic Planning, and Portfolio Planning enabling the portfolio stakeholders to create resource assignments for their work.

Advantages and benefits of Resource Management Workspace

- Assigning resources to outcomes: facilitates the process of allocating people to achieve specific outcomes for a task.
- Planning attributes: acts as a common currency between capacity planning, resource assignments, and financials.

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- Diversified handling: manage the inevitable changes to support your organization and priority changes during your planning cycle.
- Granular allocation: split or move an assignment to effectively handle the granular changes for your work.
- Allocation spread: toggle between the monthly or weekly view of resource allocation which caters to various planning and reporting needs.
- Grouping of assignments: group the resource board view using primary attributes such as group, role, or skill to reassign any existing work to a different user.
- Enhanced insights: get a deeper, informative, and more insightful details into the allocation details using the heatmap view.
- Better integration: prevent errors and ensure better practices by locking down resource assignments with recorded actuals, preventing modifications or deletions to maintain historical work data.
- Clear alerts: notify a stakeholder or a resource user using the alert icons which indicate any over allocations or change in assignment status.
- Streamline communication: capture the required or additional information in the notes to establish a seamless communication between resource manager and resource requester.

Using Resource Management Workspace

Create custom resource board views of persistent portfolios to view the current resource allocation and resource requests for all of your resources and work.

Resource assignments from different planning workspaces are pulled into this dedicated view for Resource Managers to give you an overall work view. Resource Managers can access the dashboard to view the assignment details at high level and create resource cards to build persistent portfolios and view the resource allocations.

Quickly create multiple portfolios using resource cards and navigate between these cards to work on the resource requests. Use the advanced condition builder to customize these portfolios based on the teams, attributes, groups, and so on, to view the resource allocation.

Tip:
Save the filter query and the conditions that you build to revisit and work on the resource allocations.

Overview dashboard

Resource Management Workspace overview dashboard provides a high-level interactive resource assignment details that help Resource managers to focus on where to prioritize the efforts, identify conflicts, and review the upcoming or pending assignments. Using this dashboard, Resource managers can view the data around their resources and work for efficient resource forecast planning.

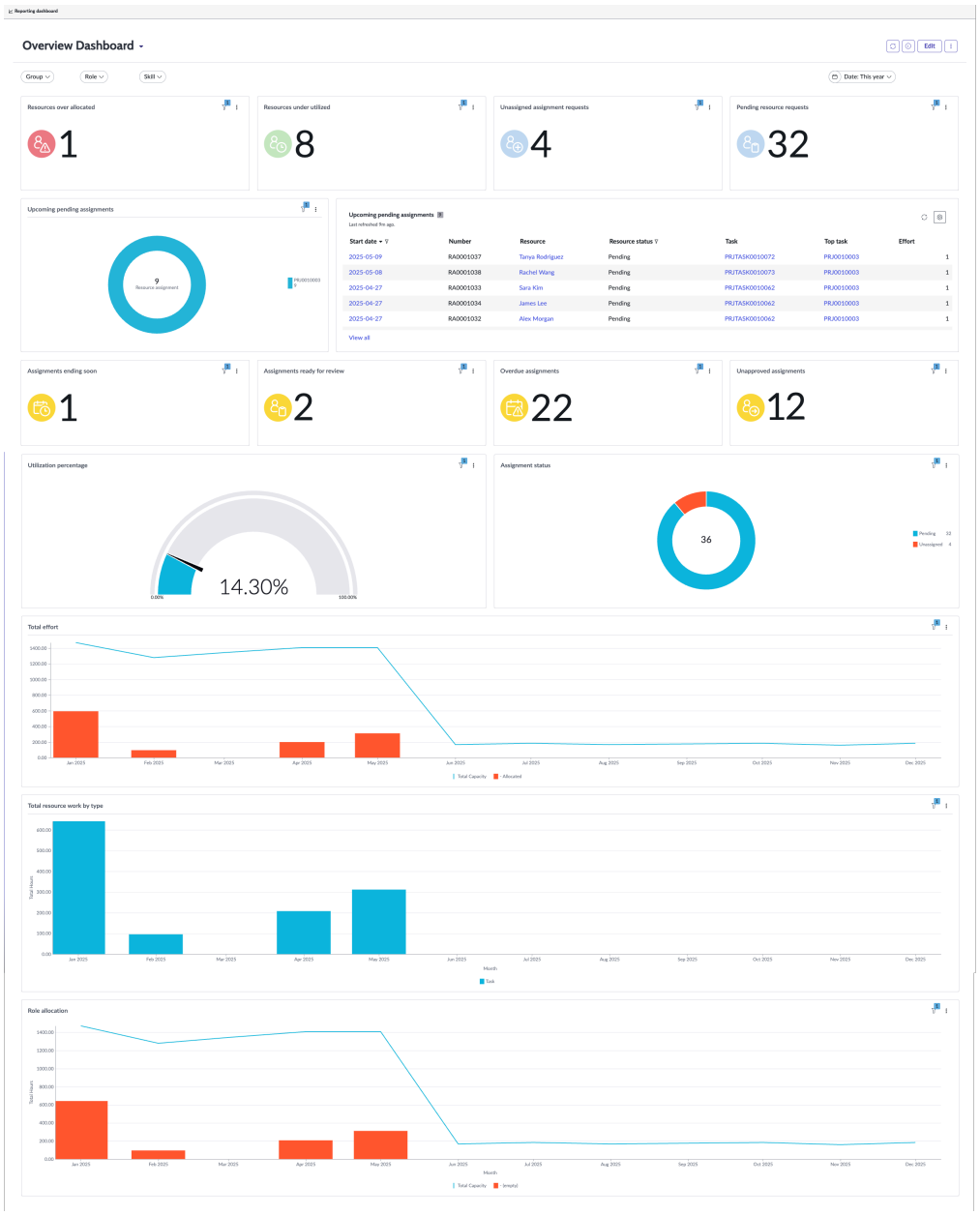
The Overview dashboard is crafted to reduce the effort of navigate between different resource boards to view the unassigned work, pend activities, and prioritize day-today tasks.

Note:
When you navigate to Resource Management Workspace, the Overview dashboard is the landing page. You can navigate to resource cards using the side navigation menu.

You can edit the dashboard based on:

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- Primary attributes and date range selection.
- Add and edit widgets to the dashboard.

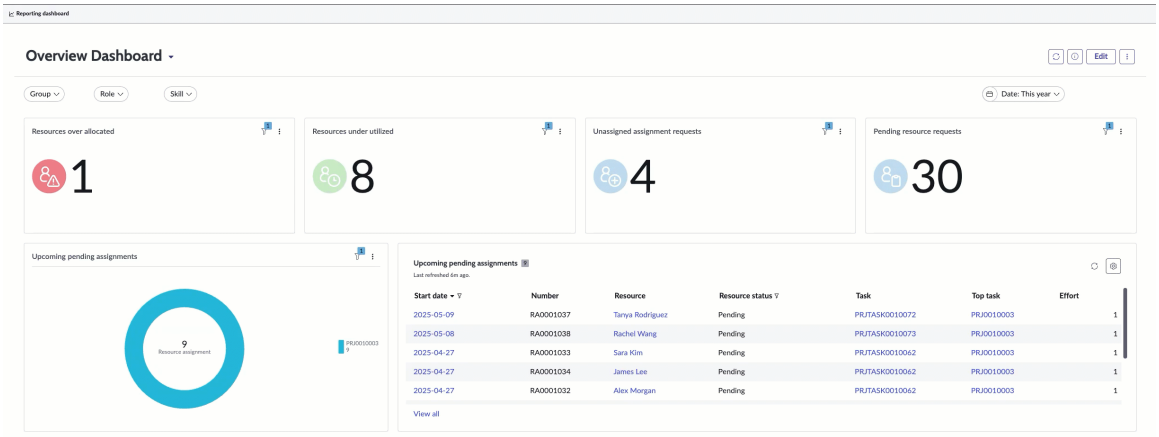


The interactive dashboard creates a resource board for any selected data helping you to directly access the customized board view from the dashboard. For example, if you select the Unassigned tasks widget, this creates and navigates you to a resource board view with the list of unassigned tasks from the widget.

On the board view, you can get the drill down view of all the assigned assignments to the users. The timeline range in the board view matches with the date range of the dashboard.

By accessing these custom boards, Resource managers can assign and approve the assignments in reduced turn-around time, and enhancing productivity.

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Dashboard widget details

Widget title	Description
Resources over allocated	Number of over-allocated users.
Resources under utilized	Number of users with available bandwidth.
Unassigned assignment requests	Number of unassigned tasks.
Pending resource requests	Total number of requests in Pending state.
Upcoming pending assignments	Number of assignments starting by next month. There are two views for this widget. A pie chart and a list view. Selecting Pie chart navigates you to the resource board view. Selecting the table values. • Start date - opens resource assignment record view. • Resource - opens to resource details page. • Task - opens project task details in record view. • Top task - opens the top task details in record view. Select **View all** to see the simple list view of assignments.
Assignments ending soon	Number of assignments ending from current date to next month.
Ready for review	Number of assignments that are in ready for review state.
Overdue assignments	Number of assignments with past end dates.
Unapproved assignments	Number of unapproved assignments.
Utilization percentage	Average of the utilization % of the users based on the selected primary attributes.

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Dashboard widget details (continued)

Widget title	Description
	Example: You can select a primary group to view the average utilization % of the entire group. This helps Project Managers to better plan the resource requests. Resource Managers can use this data while approving the assignments.
Assignments status	Breakdown view of the resource assignments based on the status.
Total efforts	Bar chart displaying the monthly breakdown view of allocated hours vs capacity. Select the chart to get the drill down view of the resource allocations in the resource board.
Total resource work by type	Displays the allocated hours based on the task type. Example: Operation work, Project Task, and so on.
Role allocation	Bar chart displaying monthly breakdown view of the total number of allocated hours based on the user roles. Select the chart to get the drill down view of the resource allocations in the resource board.

Resource board

Using this intuitive workspace, Resource Managers can:

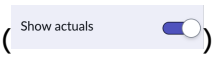
- View the number of tasks assigned to a resource.
- Understand the type or state of the assignment, and track the changes made to assignments.

Indicator	Description
	Indicates that the resource allocation is within the available bandwidth.
	Indicates that the resource is over allocated for the available bandwidth.
	Indicates the work assignment is made for a group.
	Indicates changes to start or end date, allocated hours, and so on, to the approved resource assignments.

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Indicator	Description
	Note: When these changes are made, the status of the assignment is moved to pending, indicating resource manager about the review required for the changes made. Once the changes are reviewed and the assignment is either approved or unapproved, this icon is no longer displayed.

- Understand of the status of the assigned tasks rolled up to resource level using the Resource status column.
- View the primary attributes such as Group, Role, and Skill of each resource in the top tray. These come in handy while working on reassigning a task to different user with the same primary attributes.
- View the priority and state of the project, demand, or epic in the Priority and State columns in the resource board and allocate resources to priority or high-risk planning items.
- View the actual hours vs allocated hours for a task.

  Enable the **Show actuals** toggle (

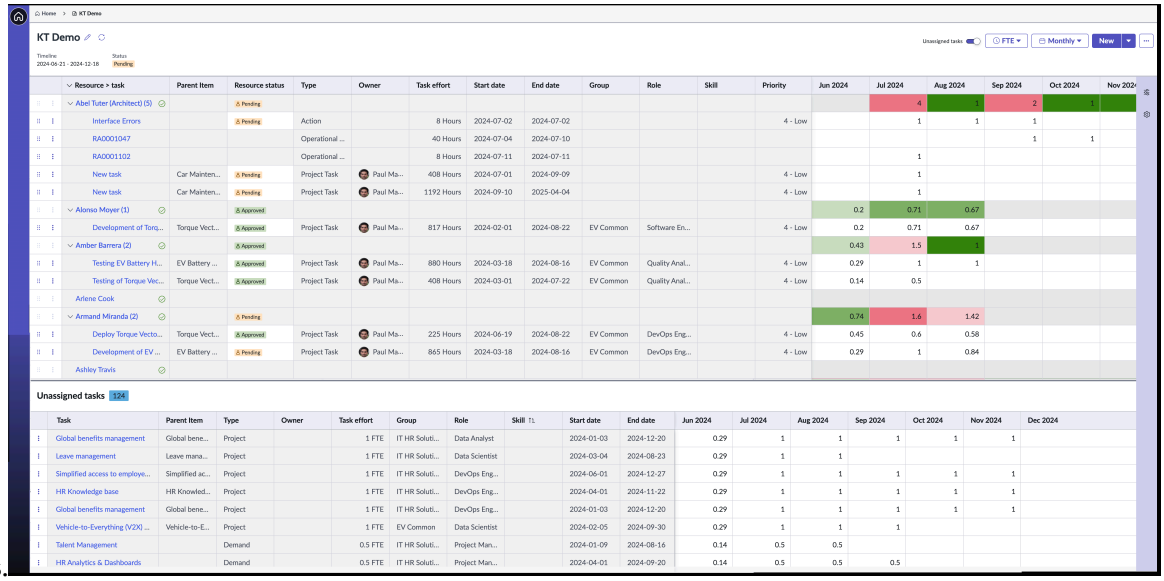
) from the settings side panel () to view the efforts captured for a task via time cards. Approved time cards are reflected in the resource board view as actual hours.
- Get insights about the resource allocations using the new heatmap modal.
- View or hide requested work in the lower tray using **Unassigned tasks** toggle.
- Filter unassigned work to view the custom requests.
- Edit the task effort for any group allocations and approve it in the top-tray using the inline editing feature.

  Note: If you edit the allocations for any approved group assignment, a confirmation window appears. Once approved, the state is changed to Pending.

- Assign the unassigned tasks.
- Approve or unapprove the assigned tasks.
- Split a resource assignment into two for one resource at the required date.

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Once you access these resource cards, you get a similar view as the following example with extensive insights.



Tip:
You can filter out or add required columns in the top and bottom tray of the resource board view using **Column config** ( ) settings.

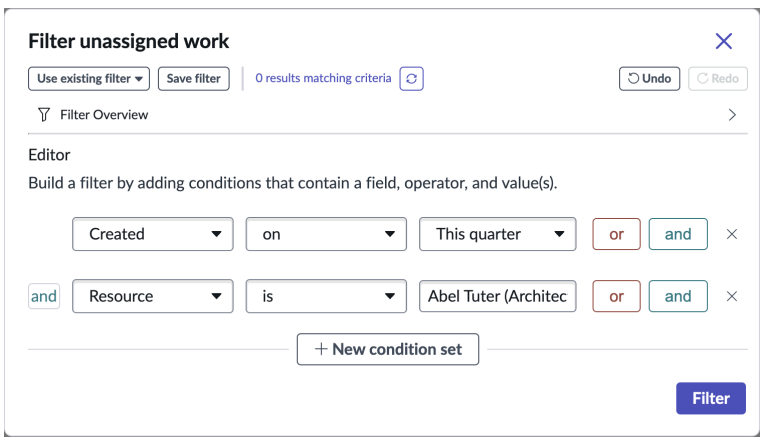
Personalize your resource board view

You can customize the resource board to personalize your view. These user preferences are saved to give you the same view every time.

- View or hide unassigned tasks

  Use the **Unassigned tasks** (Unassigned tasks) toggle to view or hide the unassigned tasks in the bottom tray.

  The Unassigned tasks view, in the bottom tray, facilitates you to build a custom filter condition to view unassigned requests with details such as duration, breakdown view of requested efforts, requested work item and its parent item, owner or requester of the task. Use the filter condition builder to get a custom or focused view of the unassigned tasks.



- Change effort type

  Switch between **Hours**, **FTE**, or **Person Days** effort types to view resource allocations based on the required effort type.

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- Group By

  Customize the view of your resource boards using the **Group By** feature to regroup the resources depending on your organization needs. You can group by **Primary Group**, **Primary Role**, **Primary Skill**, **Owner**, or **Project**.

- View or hide columns

  Use the column config option ( ) to view or hide any columns on the top tray or bottom tray of the resource board.

Resource allocations and heatmap view

The resource allocation view in the top tray provides you with a nested view of the assigned work items rolling up to resource level and the resource allocation breakdown view based on the time-frame (weekly or monthly) and by work efforts (hours, FTE, or person days).

Select the arrow ( ) icon to get details at the individual task level (epics, demands, and so on) assigned to the resources. This helps you to get a breakdown view to understand:

- Work assigned to a specific resource.
- The amount of time a resource is allocated to an individual task.

Tip:
Switch between different efforts such as hours, FTE, or person days to view a resource allocation heatmap based on the selected effort type.

You can edit the resource assignments using the inline editing feature in the top-tray.

The **Resource status** column helps you to easily identify any Pending ( ) or Unapproved ( ) work items assigned to a resource.

Note:
The status of the assigned work is rolled up to the resource level and the resource card level. If there are any pending or unassigned work items in the top tray, the rolled up status at resource level and card level shows Pending.

Define custom statuses to calculate and view resource capacity in the allocation heatmap modal.

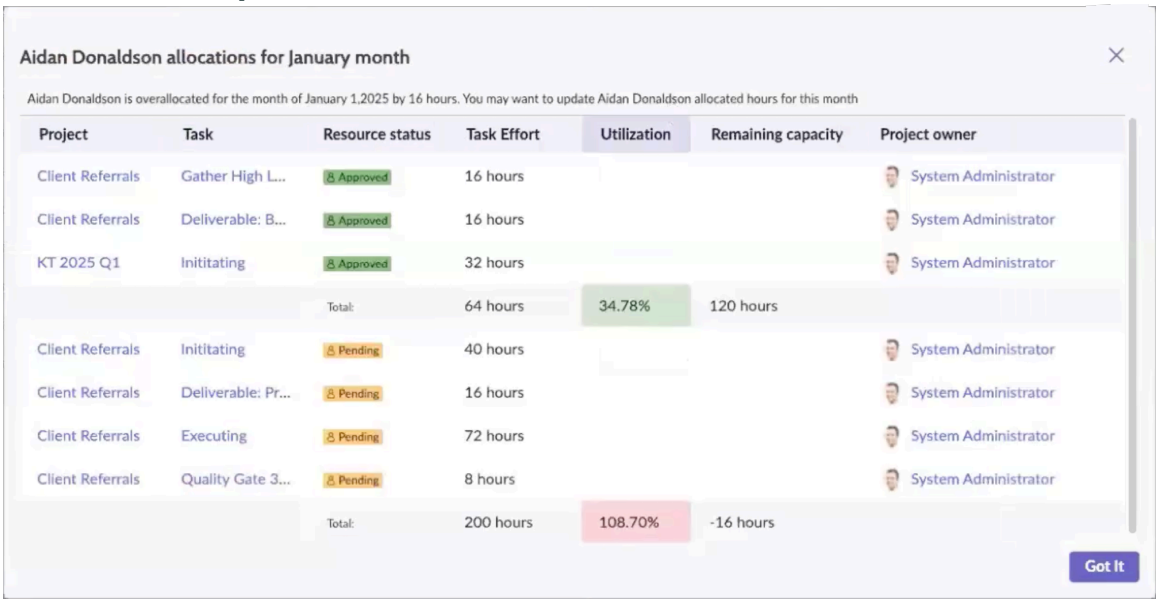
Allocation heatmap modal gives you an overview of the resource utilization to identify the over allocated and the available resources. The allocations are color-coded to display the availability of the resources and help you to identify the availability of the resource for the filtered time frame.

The new heatmap modal gives you the following insights for a resource such as the assigned tasks with their respective project owner, resource status, efforts for each task, total utilization percentage for the approved tasks, and the remaining capacity.

Very Over Utilized	150 +	%
Over Utilized	100 - 150	%
Full Utilization	100	%
Good Utilization	51 - 99	%
Under Utilized	0- 50	%

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Allocation heatmap breakdown



From the preceding example, you can see the breakdown of the approved work items along with the rolled up efforts, Utilization percentage, and the Remaining capacity for the month of January 2025. The approved work is within the resource capacity as the remaining capacity is 120 hours. A Resource manager can use these insights to decide and allocate the pending work items to another resource with available effort.

Important:
Resource efforts calculations are driven by the `com.snc.resource_management.exclude_status_from_capacity` property. Admin can configure this property to calculate efforts for certain defined resource assignments only. For more information, see Resource Management properties.

Using the `com.snc.resource_management.exclude_status_from_capacity` property, Resources managers can customize to view the resource assignments with a specific state in their workspace and what to view in the total allocation modal. For example, you can view resource assignments in either Approved, Unapproved, and Pending resource assignments, or the ones in Approved and Pending states only.

Once the property is set up, work items in a specific states to show up in the full capacity and full allocation rollup of a resource. The new allocation modal displays the allocation breakdown and the rollup values of the work items for the configured states.

When you group a resource board using the Group by option, the heatmap allocation modal for a group gives the following insights.

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For example, when you group a resource board by Primary Group to view the allocation heatmap modal of a group for January 2025, the following modal is displayed. This modal gives insights into the total overall allocation of different types of Resource statuses.

Note:
The efforts in the allocation modal are displayed in Hours.

Group resources on resource board

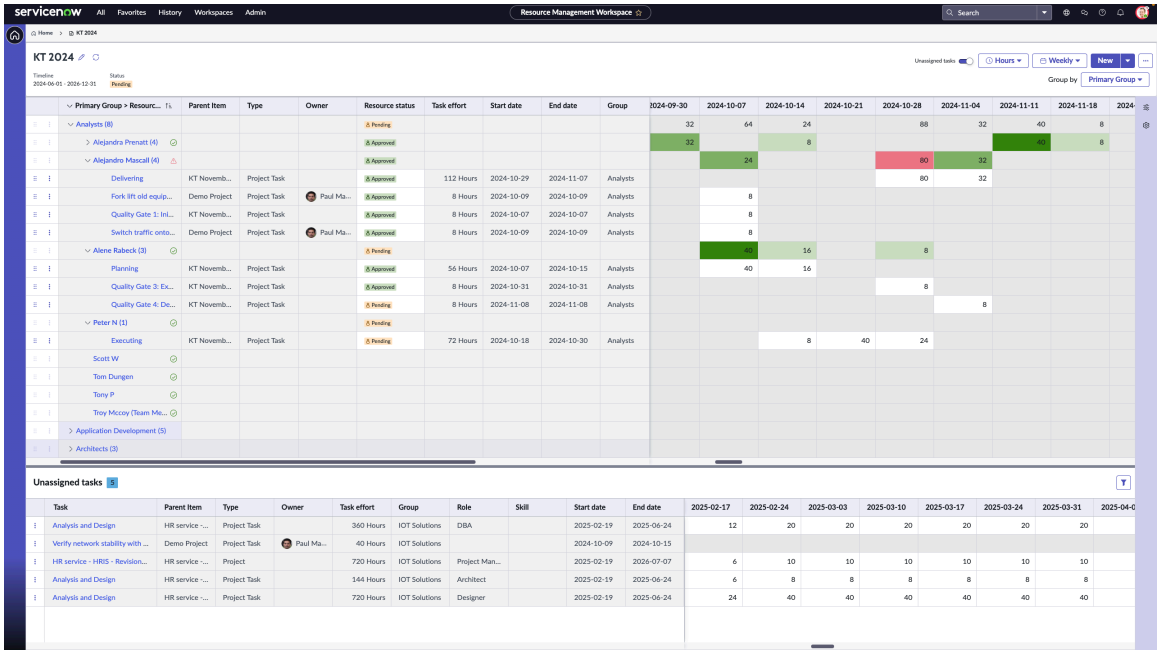
The resource board provides a comprehensive list of resources, which are fetched depending on various resource attribute types, projects, and work items. You can group these resources to gain an accurate perspective on specific attributes, owner, or the parent items associated with the projects. You can group the resources by **Primary Group**, **Primary Role**, **Primary Skill**, **Owner** of the task, or **Parent Item** of the work.

If you group the resource board by **Primary Group**, you see the list of primary groups that the resources are associated with and a drop-down of the list of resources in that group and the work item they're working on. In this view, you also get the rolled up values of the efforts at resource level and group level. The rolled up values can be viewed at a monthly or weekly breakdown.

Resource Managers can use this information to plan the resources and manage assignments.

Tip:
Grouping the resources based on the primary attributes helps Resource Managers to easily reassign the work as the primary attributes should match to reassign work. For more information on how to reassign a work, see Reassign or unassign work using Resource Management Workspace.

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Create a resource card

Create a custom resource card to view resources and unassigned tasks, and work on resource mapping for your persistent and focused portfolios.

Before you begin

Role required: resource_user, resource_manager, it_project_manager

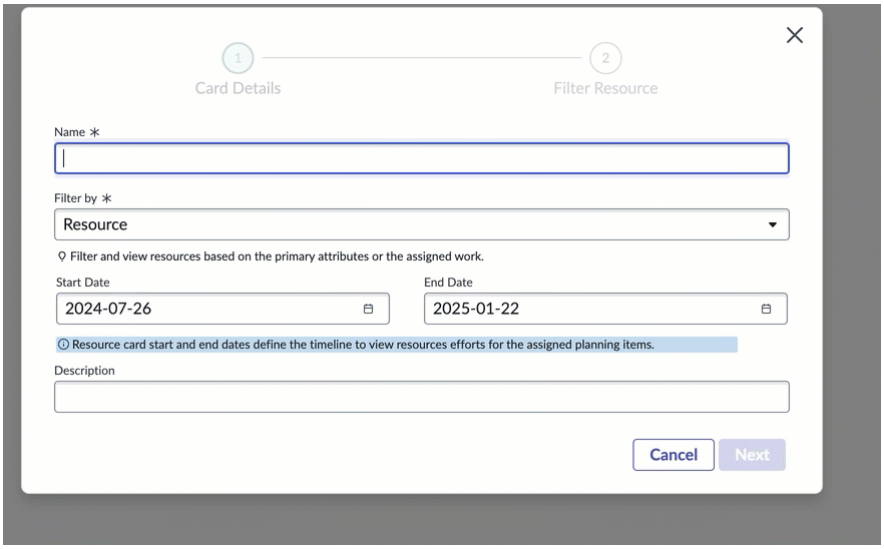
Procedure

1. Navigate to **Workspaces** > *Resource Management Workspace*.
2. Select the Resource cards icon ( ) from the menu.
3. Select the **New Resource Card** button (New Resource Card).
4. Enter the following details.
   By default, the date range is set to six months from today's date. Maximum date range is 3 years from the selected start date.
5. Select **Next**.
6. Create filter condition to view a custom set of resources.
   The default condition is set to show all active users.

   Tip:
   Save a filter condition using the **Save filter** option (Save filter) and name the filter to easily identify it later. Next time you create a resource card, you can select one of your saved filters from the **Use existing filter** list and customize it further.

7. Select **Confirm**.

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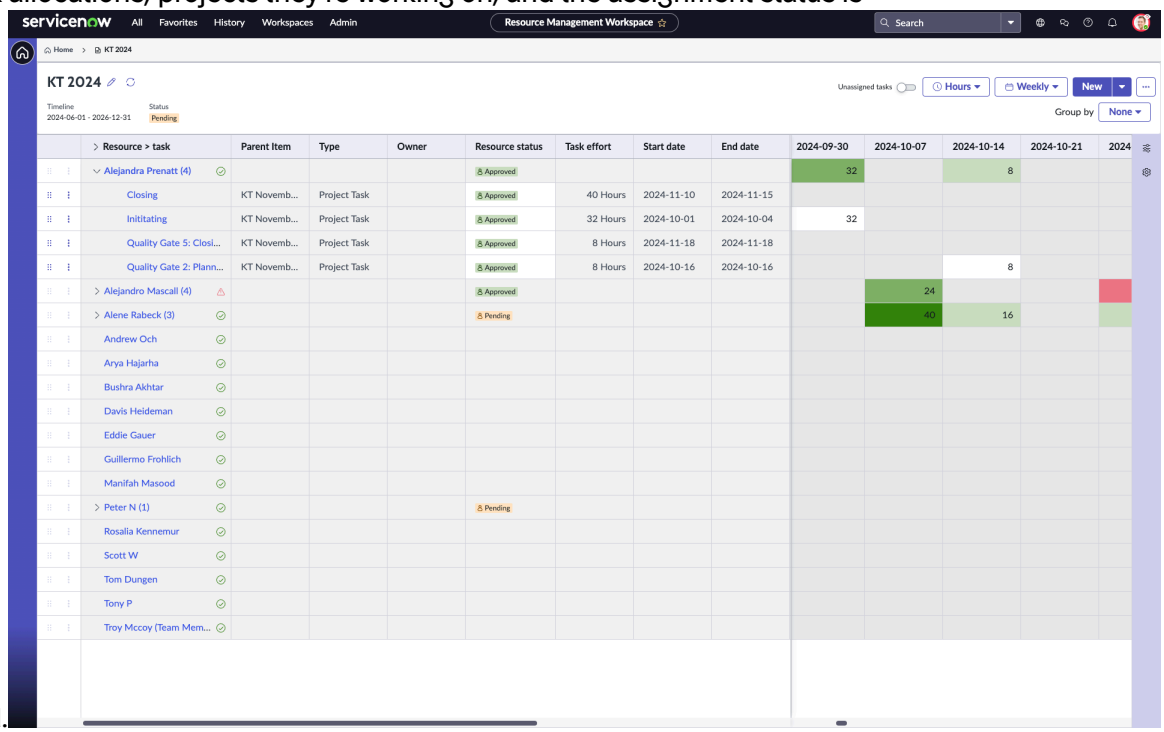


Note:

You can edit the card details and filter condition using the edit icon ( ) on the resource board.

Result

A resource board view with the list of resources matching the filter condition with their work allocations, projects they're working on, and the assignment status is displayed.



What to do next

Enable the **Unassigned tasks** toggle and build a filter condition to view unassigned tasks in the Unassigned tasks bottom tray.

For more information on how to filter and view unassigned work, and handle resource assignments, see View, assign, and approve unassigned work using Resource Management Workspace.

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Create resource assignments and operation resource assignments in Resource Management Workspace

Create and assign resource assignments and operation resource assignments from Resource Management Workspace.

Before you begin

Role required: resource_user, resource_manager, It_project_manager

Procedure

1. Navigate to **Workspaces** > *Resource Management Workspace* and open a resource card.
2. Create resource assignments using one of the following options.
3. Select **Submit**.

Result

Resource assignment is created. You can filter and view this assignment in the lower tray of Unassigned tasks.

If an assignment is made for a resource from the resource board and if it's within the selected date range, the assignment shows up nested under the selected resource in real-time.

View, assign, and approve unassigned work using Resource Management Workspace

Filter the unassigned work to view priority requests and assign them to resources. Quickly connect with the requester via Microsoft Teams to get additional insights and approve the assigned work using the inline editing feature.

About this task

The assign logic provides you with the flexibility and control for users when assigning work to resources. It addresses the following goals:

- Efficiency: Quickly allocate unassigned tasks to available resources.
- Personalization: Enables users to configure how effort is distributed—either automatically or manually.
- Transparency: Get a preview of the real-time breakdown of effort allocation before assigning the work to resources.
- Flexibility: Manual distribution supports custom selection of resources, which helps Resource managers manage work allocations based on the availability and remaining capacity of the resources.
- Fairness: Distributes work equally among the resources maintaining a balanced work.

Before you begin

- Create an active employee definition for resources to view their allocation details on the Resource Management Workspace.
- Create a resource card.
- Role required: resource_user, resource_manager

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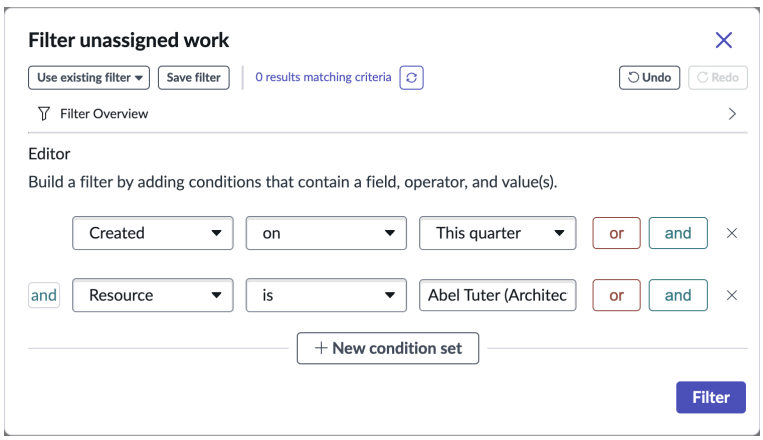
Procedure

1. Navigate to **Workspaces** > *Resource Management Workspace*
2. Select the Resource cards icon ( ) from the menu and open a resource card.
3. Enable the Unassigned tasks toggle (Unassigned tasks) to view the unassigned work requests in the lower tray.
   Project Managers create resource requests based on the primary attributes (Group, Skill, or Role).
4. In the bottom tray, select **Filter** ( ) to filter the unassigned work and get a custom view of what you want to see.

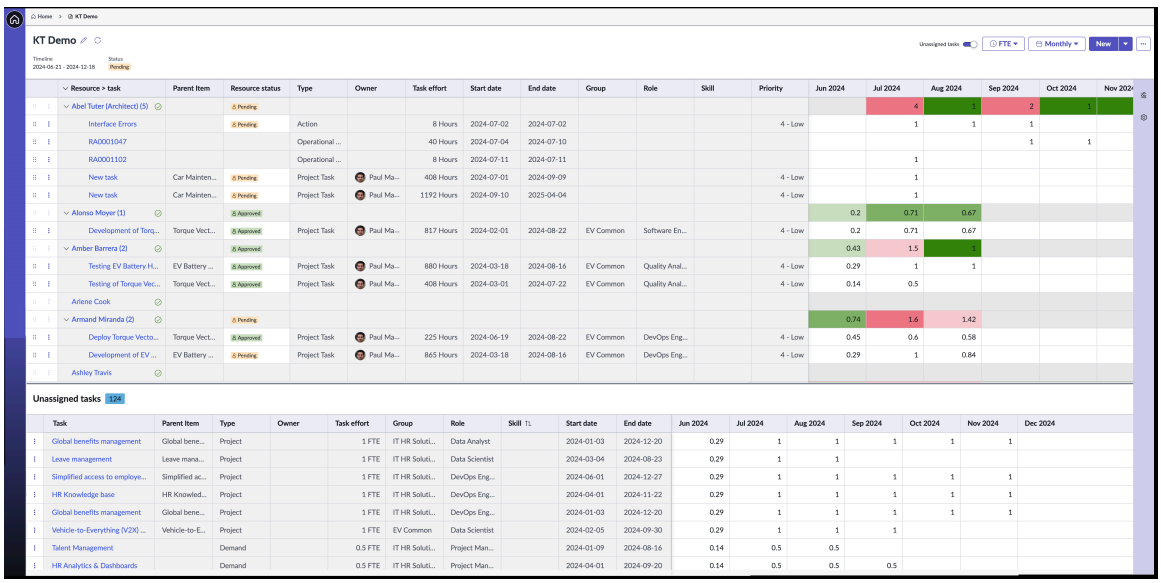
   You can use the attributes such as resource groups, teams, roles, skills, projects, time frame, and so on, to work with advanced filters.

   Tip:
   Use the condition builder to build a filter and work on priority requests.

   Example: This is a condition to filter the unassigned work requests created for a specific user.



5. Select **Filter**.
   The unassigned work matching the filter condition is displayed in the Unassigned tasks tray.



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6. In the Unassigned tasks tray, select the Row context menu for any task (⋮) and select **Assign Work**.
7. You can assign work using one of the following ways.

   Note:
   Remaining efforts after equally distributing the work among the users is retained in the Unassigned tasks tray. Resource managers can again allocate these efforts.

8. Select the **Preview** button to see the real-time allocations before assigning the work.
9. Select the **Assign** button to assign work to the resources.
   The assigned work is reflected in the top tray nested by resource view and will be in Pending state (Pending).
10. Expand a resource row using the chevron icon (›) to view assigned tasks.
11. Double-click in the Resource status column and select **Approve** to confirm the assigned work so the resource can start working.
    While assigning the work, you can easily identify if a resource is available (✓) or overutilized (⚠), even for the future periods, using the iconography.
12. You can change the status of any assigned assignments using one of the following options.

13. **Optional:** You can select the owner's name to collaborate with them over Microsoft Teams to get additional insights regarding the work.

Result

The assigned work items are Approved (Approved) or Unapproved (Unapproved) and the status of the work assignments is rolled up to the resource level.

What to do next

If no tasks appear in the Unassigned tasks tray, verify the following:

1. Verify the resource requests exist. Project Managers must create resource requests (resource assignments with status Requested) on project tasks. Navigate to the project and verify resource requests exist on the Resource Assignments related list.
2. Check if primary attributes match. The resource card filter must match the primary attributes (Group, Skill, or Role) defined in the resource requests. Open your resource card and verify the filter criteria aligns with existing requests.
3. Check if the employee profiles are generated. Ensure employee profile definitions have been generated for the resources in your view.
4. Request state is correct. Only resource requests in **Requested** state appear as unassigned. Requests that are already Assigned, Approved, or Cancelled don't show.
5. Check the date range. Verify the resource card's date range overlaps with the resource request dates. Requests outside the visible time frame will not display.
6. Confirm the permissions. Confirm you have the resource_manager role, which is required to view and manage unassigned work.

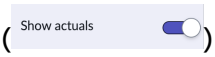
Move a resource assignment

Move a resource assignment to a different start and end dates depending on the availability of the resource.

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Before you begin
Role required: resource_user, resource_manager

About this task
- The resource assignment dates honor the task dates. The start and end dates of the resource assignments should be within the task start and end dates.
- When a resource assignment is moved beyond the task dates, the allocations outside the dates are cleared.
- You cannot move a resource assignment if actual efforts are captured for the work.

  Use the **Show actuals** toggle (

) from the settings () side panel to view the efforts captured for an assignment via time cards.

Procedure
1. Navigate to **Workspace** > *Resource Management Workspace*.
2. Select the Resource cards icon () from the menu and open a resource card.
   Alternatively, you can access a resource board by accessing a widget from the overview dashboard.
3. Select the chevron icon () for drill down view of the tasks assigned to resources.
4. In the top tray, select the row context menu () for the required task and select **Move**.
5. In the move assignment modal, you can either enter or select the new start date using the date picker modal from the **New start date** field.
6. **Optional:** Change the assignment status using the **New status** list.
7. Select **Confirm**.

Example: Moving a resource assignment
Let's consider a resource assignment for Website Overhaul task is assigned to Grace Lee. The task duration is from August 01, 2025 to August 31, 2025. The assignment duration is from August 01, 2025 to August 20, 2025. Now, when you move the assignment start date to August 15, 2025; the new assignment dates will honor the task dates and will auto-assign the work from August 15, 2025 to August 31, 2025. The remaining efforts of the resource are cleared and the cleared capacity is shown as available.

Reassign or unassign work using Resource Management Workspace

Reassign or unassign any assigned work from the Resource Management Workspace. You can group the resource board by primary attributes to identify the resources with same primary attributes.

Before you begin
- When you reassign work, the primary attributes of both the resource should match. For more information about mapping primary attributes to resources, see Map primary attributes to resources.
- You can reassign a work item for the period for which actual hours are not captured.
- You cannot reassign a work item if it has associated actual hours captured for the entire duration.
- You cannot unassign a work item if it has any associated actual hours captured.

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- You cannot unassign an assignment if it has any associated actual hours captured.
- You cannot reassign or unassign group resource assignments.

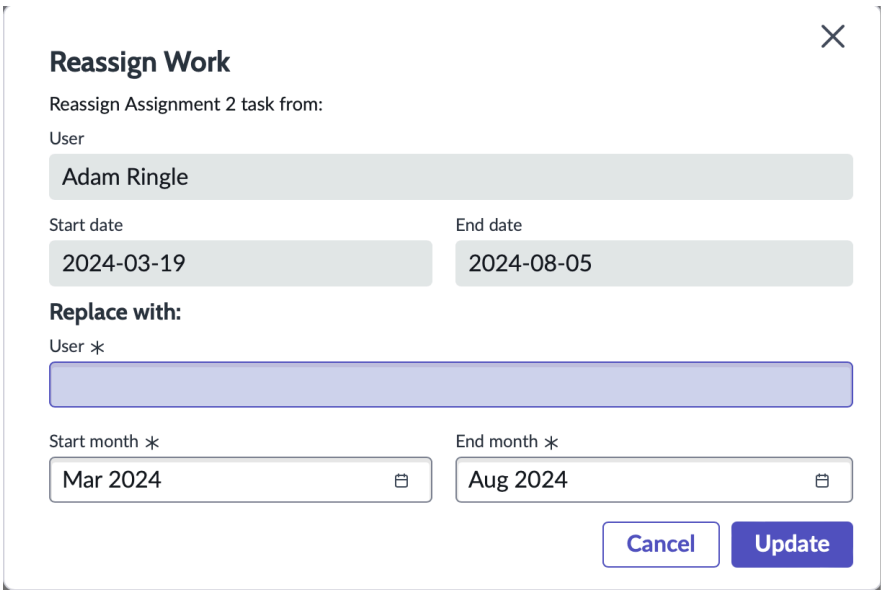
Role required: resource_user, resource_manager

Procedure

1. Navigate to **Workspace** > *Resource Management Workspace*
2. Select the Resource cards icon ( ) from the menu and open a resource card.
3. Select the chevron icon ( ) to expand the resource view in the top tray.
4. To reassign any assigned work:
   a. Select the row context menu ( ) for the required work item.
   b. Select **Reassign work**.

      Tip:
      Group the resource board by the primary attributes to drag and drop the resource assignments to another resource to completely reassign work.

   c. On the Reassign work window, enter the name of the resource in the **User** field to whom you want to reassign the work and duration using the **Start month** and **End month** date picker.



5. Select **Update**.

   Note:
   Use the reassign feature to assign a partial or fraction of a task among resources without overlapping the assignment dates.

   The selected work item will be reassigned to the selected resource.
6. To unassign any assigned work:
   a. Select the row context menu ( ) for the required work item.
   b. Select **Unassign work**.
   The selected work item will be moved to Unassigned task tray.

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Result
The reassigned tasks are assigned to the selected resource and unassigned tasks are moved to the Unassigned tasks tray.

Example: Reassigning work

Consider a development task spanning from January 1, 2024 to September 30, 2024 which is assigned to Tom, a developer who has the following primary attributes.

- Primary Group - Development
- Primary Skill - Java
- Primary Role - Java Developer 1

Tom has actual hours captured from January 1, 2024 through March 31, 2024 and will be unavailable for next 2 months.

As a resource manager, you can either reassign this task in it's entirety starting from April 1, 2024 till September 30, 2024 to Raj, who has the same primary attributes. Or reassign the task from April 1, 2024 to May 31, 2024 to Raj, leaving the rest of the assignment to Tom.

The actual hours captured by Tom are retained even though the task is reassigned. Raj can capture the actuals hours for the assigned period after completing the work.

What to do next
You can allocate the unassigned work and approve the reassigned work. For more information, see View, assign, and approve unassigned work using Resource Management Workspace.

Split resource assignments using Resource Management Workspace

Splitting a resource assignment at a specific date creates a resource assignment for the same user.

Before you begin

- When you split a resource assignment, a new assignment is created from the selected date. Both the assignments are assigned to the same user retaining the state of the assignment.
- When you split a resource assignment, a new assignment is created from the selected date. Both the assignments are assigned to the same user with Approved state.
- If a resource assignment has actuals captured for a certain duration, you can split the work only at the dates where there are no actuals captured.
- Role required: resource_user, resource_manager

About this task
When to use split or reassign for assignments.

Use Split when you need to divide a single resource's assignment into two time periods with different allocation levels, effort distributions, or tracking granularity. For example, split an assignment when a resource needs to reduce their allocation after a project milestone. Use Reassign (Reassign or unassign work using Resource Management Workspace) when you need to transfer work from one resource to another.

Procedure

1. Navigate to **Workspace** > *Resource Management Workspace*.
2. Select the Resource cards icon () from the menu and open a resource card.

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3. Select the chevron icon ( ) to expand the resource view in the top tray.
4. In the top tray, select the row context menu ( ) for the required work item and select **Split**. Split modal appears providing you with the insights related to the task such as name of the task, name of the resource, start date, and end date.
5. On the Split modal, select a date to split the resource assignment using the date picker.
6. Select **Split**.

Result

The resource assignment is split at the selected date and a copy of the resource assignment with new dates are displayed under the assignments of the selected resource.

Example: Split resource assignment

Consider a resource assignment named `Implement GenAI in docs` assigned to Abel Tuter from July 16 through December 02. If you split the resource assignment at September 09, there will be two resource assignments with the same name and state assigned to Abel Tuter.

One resource assignment ranges from July 16 to September 09, and the other assignment ranges from September 10 to December 02.

Resource > task	Parent Item	Type	Owner	Resource status	Task eff...	Start date	End date	Jul 2024	Aug 2024	Sep 2024	Oct 2024
Abel Tutor (4)				Pending				112	176	168	184
Implement GenAI in docs	Implementat...	Project Task	System ...	Approved	480 Hours	2024-09-10	2024-12-02			120	184
Implement GenAI in docs	Implementat...	Project Task	System ...	Approved	320 Hours	2024-07-16	2024-09-09	96	176	48	

Here, you can see an overlap of efforts for `Implement GenAI in docs` in month of September because the split is happening from September 10.

Manage resource allocations in Resource Management Workspace

Manage resource allocations to change efforts, start and end dates, extend and so on to adjust resources based on their availability and the priority of the tasks.

Before you begin

Role required: resource_user

Date handling for allocation changes

When you extend or modify resource allocations, the system uses the following date logic:

- Projects: The allocation dates are bounded by the project task's planned start and end dates. If the task has actual dates, those take precedence over planned dates.
- Demands: The allocation dates are bounded by the demand's planned start and end dates. If no end date is set on the demand, the allocation can be extended indefinitely.

You cannot extend an allocation beyond the parent record's end date without first updating the project task or demand dates. If the allocation dates exceed the parent boundaries, the system may truncate the allocations or display a warning.

Procedure

1. Navigate to **All** > **Workspaces** > *`Resource Management Workspace`* and open a resource card.
2. Expand the resource view in the top tray.
3. Edit the following allocation details in the resource board drill-down view.

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Export resource portfolio view to Excel or CSV format

Export your resource portfolio view in Resource Management Workspace as Microsoft Excel or CSV format to review or share the resource status with stakeholders, even if they don't have access to your instance.

Before you begin

Role required: resource_user, resource_manager, it_project_manager

Procedure

1. Navigate to **Workspace** > *Resource Management Workspace* and open a resource card.
2. Select the More Actions menu () and select **Export**.
3. In the Export resource board window, select a required format from the **File type** list to export the resource portfolio.
   - **Excel** - Exports the resource portfolio in Microsoft Excel format.
   - **CSV** - Exports the resource portfolio in CSV format.
4. Select the **Export** (

) button.

Result

The resource portfolio view is exported with `export_file` as the file name in the selected format.

Managing resource assignments from Project Workspace

Optimize project execution by assigning resources to tasks within the Project Workspace. You can create resource assignments for any project or project task, specifying the tasks to be performed and the resources to be allocated. Use the Resource Management application to allocate and manage your resources in the Project Workspace.

Resource assignments

Resource assignment is a process of allocating a resource or group of resources to a project task. When a resource assignment is initiated, a resource plan is auto-generated in the back-end of the project management system. This resource plan details the information of how resources would be allocated throughout the project. Resource assignments are approved by the resource manager to make sure that the allocation aligns with the overall resource strategy, considering factors such as availability, skills, and project priorities. Resource assignments remain dynamic and can be edited throughout the project life cycle. Resources can be assigned based on defined attributes such as skills, expertise, or other criteria relevant to the project or task.

Note:

Resource efforts calculations are driven by the `com.snc.resource_management.exclude_status_from_capacity` property. Admin can configure this property to calculate efforts for certain defined resource assignments only. For more information, see Resource Management properties.

Edit the child resource assignments directly using the inline editing from the resource assignment pane.

Using Resource Management, you can create, plan, track, and monitor resource assignments at a project or task level in the Project Workspace. With Resource Management in Project Workspace, you can:

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- Create an attribute-based resource assignment.
- Change the resource assignment dates, resources, efforts, and proposed allocations at any level of the project.
- View resource allocations using new heatmap modal. The allocations are color-coded to display the availability of the resources.
- View the primary attributes such as Group, Role, and Skill of each resource in the resource assignment pane. They are useful when you work on reassigning a task to a different user with the same primary attributes.
- Switch between **Hours**, **FTE**, or **Person Days** effort types to view resource allocations.

Important:
Resource efforts calculations are driven by the `com.snc.resource_management.exclude_status_from_capacity` property. Admin can configure this property to calculate efforts for certain defined resource assignments only. For more information, see Resource Management properties.

Key features

With resource assignments, you can:

- Determine the resource engagement timing and allocate resources for specified durations, contributing to the creation of a timeline for task completion.
- Align task execution with the project plan, ensuring tasks are carried out in accordance with specified timelines and resource requirements.
- Initiate an approval process that is conducted by a resource manager and make sure it aligns with project targets and resource availability.

Key benefits

Using Resource Management, you can create, plan, track, and monitor resource assignments at a project or task level in the Project Workspace. With Resource Management in Project Workspace, you can:

- Create an attribute-based resource assignment.
- Change the resource assignment dates, resources, efforts, and proposed allocations at any level of the project.
- View resource allocations using new heatmap modal. The allocations are color-coded to display the availability of the resources.
- View the primary attributes such as Group, Role, and Skill of each resource in the resource assignment pane. They are useful when you work on reassigning a task to a different user with the same primary attributes.
- Switch between **Hours**, **FTE**, or **Person Days** effort types to view resource allocations.

Create resource assignments using Project Workspace

Create an attribute-based resource assignment in the Project Workspace application for any project or project task.

Before you begin

After a resource assignment is created, a Resource Plan is created automatically in the back-end. The resources are allocated to the project and approved by the Resource Manager. You can edit the assignment throughout the project life cycle.

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Role required: it_project_manager

Procedure

1. Navigate to **Workspaces** > **Project Workspace** and open a project.
2. View the resource assignment pane by enabling the **Resource assignments** toggle button.

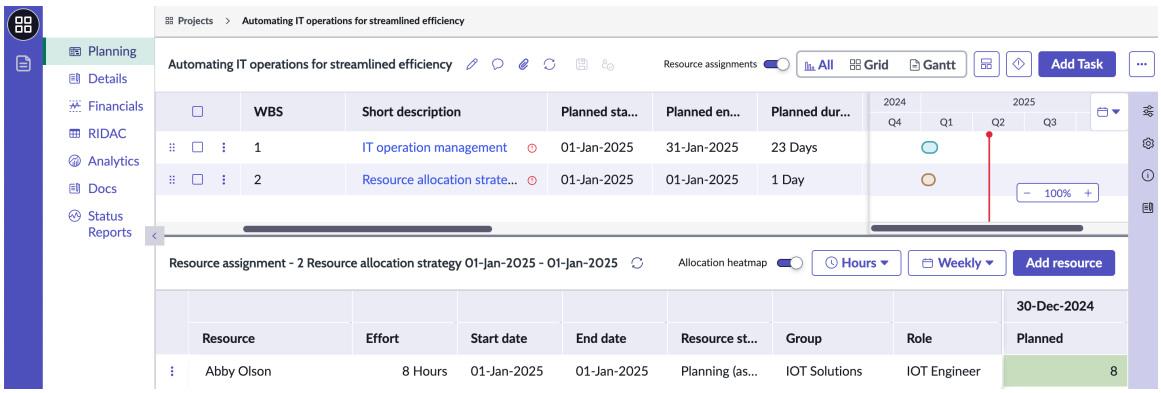
> **Note:**
> If the property *sn_pw.enable_resource_planning* is set to true, then the **Resource plan** toggle button and resource assignment pane are displayed in Project Workspace. The default value is false. You must have the pps_admin role to enable this property.

3. From the Planning pane, double-click the **Resource assignees** field of a project task to add resource.

   You can assign the resources from both planning and resource assignment pane.

4. From the resource assignee list, select a user or group and press **Enter**.
   When you create a resource assignment, the user or group allocation is based on the selected effort type. For example, when you add a user and the effort type is selected as hours, the allocations are displayed in hours.
   A resource assignment record is created and auto-saved. The resource assignment form auto-populates the project or task information.
5. **Optional:** From the resource assignment pane, create a resource assignment for a project or task by selecting **Add resource**.

   (Optional) You can create a resource assignment for a project from the resource assignment pane only.



6. Select the expense type of the assignment based on the work as **Opex** or **Capex**.
   A resource can use this information while capturing efforts using the time sheet portal. Once the time sheet is approved, an expense line is created for the project capturing the expense as capex or opex, based on the selected expense type.
7. View the resource allocations in the heatmap by enabling the **Allocation heatmap** toggle button.

   You can switch from the weekly view to the monthly view based on your requirement using **Monthly** list.

   Extend, edit, or delete the resource assignments using the row context menu in resource assignment pane.

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What to do next

Update a resource assignment from Project Workspace

Related topics

- Delete a resource assignment from Project Workspace
- Update the resource allocation in a heatmap
- Realign resource assignment to project task

Update resource assignment using Project Workspace

Update a resource assignment that is associated with a project or project task.

Before you begin

Role required: it_project_manager

In resource assignments, any changes made to the status of group resource assignment roll down to all associated child resource assignments status. Similarly, any changes made to the status of child resource assignments automatically roll up to the corresponding group resource assignment status.

Procedure

1. Navigate to **Workspaces** > **Project Workspace** and open a project.
2. View the resource assignment pane by enabling the **Resource assignments** toggle button.
3. On the resource assignment pane, double-click any cell to edit the entire row.
   Alternatively, you can edit the resource assignment from the row context menu. From the resource assignment pane, select the row context menu (⋮) of resource assignment record and then select **Edit**.
4. Edit the desired field, and select anywhere on the data grid to save the details.

   The resource assignment is updated in the resource assignment pane.

   Note:
   When a resource is added on an empty resource assignment, which has more than one Full-time equivalent (FTE) effort, then an additional row is created automatically and the resource assignment is auto-updated in both the rows.

   Extend, edit, or delete the resource assignments using the row context menu in resource assignment pane.

Delete a resource assignment using Project Workspace

Delete a resource assignment from Project Workspace. Deleting an assignment also deletes all associated resource allocations.

Before you begin

Role required: it_project_manager

Procedure

1. Navigate to **Workspaces** > **Project Workspace** and open a project.
2. Enable the **Resource assignments** toggle button to view the resource assignment pane.

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3. From the resource assignment pane, select the row context menu (⋮) and then select **Delete row**.
   The resource assignment is deleted from the resource assignment pane.

Update resource assignments using Project Workspace

Use the allocation heatmap capability in Project Workspace to view and update the resource allocation.

Before you begin

Role required: it_project_manager

About this task

The **Allocation heatmap** toggle button provides a detailed breakdown of the allocation of an individual resource. The allocation heatmap represents the total utilization of a resource for a week or month. By default, allocation information is displayed for the week. This information helps project managers to plan their resources effectively at the project or task level.

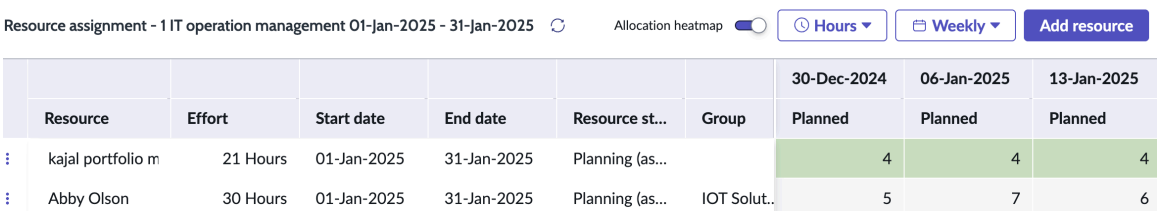
Integrate your ServiceNow® instance with your organization's Microsoft Teams to enable collaboration of your projects and resource allocations in Microsoft Teams. With the Microsoft Teams integration, you can communicate with the project team members and share real-time updates on the project and resource allocation status. For more information, see Setting up PPM collaboration for Microsoft Teams.

Procedure

1. Create resource assignments using Project Workspace.
2. View the resource allocations in the heatmap by enabling the **Allocation heatmap** toggle button.
   You can switch from the week view to the month view based on your requirement.
3. Edit the desired field and select anywhere on the data grid to save the details.
   Work allocation is based on capacity. The allocations are color-coded to display the availability of the resources as shown here. These colors help to identify the availability of the resource for a particular task.

Very Over Utilized	150 +	%
Over Utilized	100 - 150	%
Full Utilization	100	%
Good Utilization	51 - 99	%
Under Utilized	0- 50	%

4. Edit the resource allocation window by selecting the allocation hours cell.



   Enable the **Show actuals** toggle to view the actuals of each resource. The actuals can't be edited from Project Workspace.

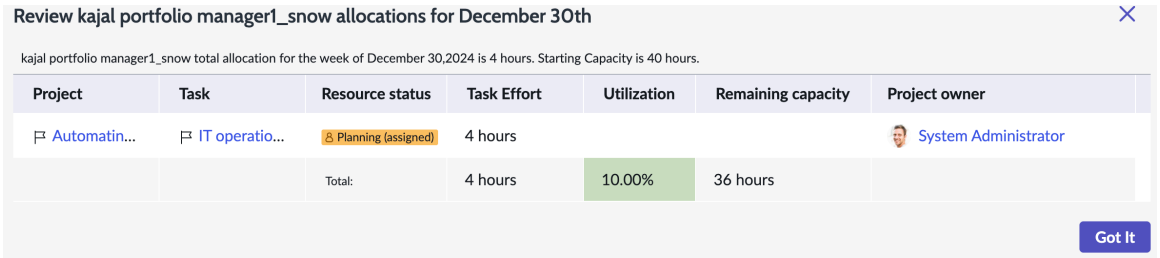
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5. From the resource allocation window, view and track the assigned **Project**, **Task**, **Resource status**, **Task effort**, **Utilization**, **Remaining capacity**, and **Project Owner** of a resource.

   The resource allocation is made according to the schedule of the resource, provided that the resource has a schedule.

   The Allocation heatmap modal provides the **Resource status**, **Remaining capacity**, and **Utilization** columns to support resource managers in evaluating task efforts.

6. Send a direct message to the project owner on Microsoft Teams by selecting the **Project Owner** field.



Note:
The **Project Owner** can only be selected if your ServiceNow® instance is integrated with your organization's Microsoft Teams. Resource assignments on demands are visible in the allocation window both before and after they become projects.

Related topics

Create resource assignments using Project Workspace

Realign resource assignment to project task using Project Workspace

Realign or synchronize the resource assignment dates with the project task dates. This synchronization helps to schedule and align the resource assignments with the timeline of project task.

Before you begin
Role required: it_project_manager

Procedure

1. Navigate to **All** > **Workspaces** > **Project Workspace** and open a project.
2. From the project planning pane, double-click the **Planned start date** or **Actual start date** of a project task.
3. Edit the field and select **Ok**.
4. From the project task row, select the row context menu and then select **Realign assignments to task**.
   Alternatively, use the Resources not synced icon to synchronize the resource assignments dates with the project dates at a project level. Realign assignments to task related link is available to perform the same action while using forms.

Result
The resource assignments dates are synchronized with the project task dates.

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Related topics

- Resource assignments in Project Workspace
- Project Workspace reference

Resource Management Workspace references

Reference fields and form details for Resource Management Workspace.

New Resource Assignment form

Fill in the following fields to create a resource assignment using Resource Management Workspace.

New Resource Assignment form

Field	Description
Assignment type	Select an assignment type from the list. • User - to create a resource assignment for a user. • Group - to crate a resource assignment for a group.
Resource	Name of the resource. This field is disabled for Group assignment.
Group	Name of the group to create resource assignment. If a resource is selected, the primary group name is populated by default.
Role	Primary role for the employee. • If a resource is selected, the primary role is populated by default. • This field is disabled for Group assignment.
Skill	Primary skill of the resource. • If a resource is selected, the primary role is populated by default. • This field is disabled for Group assignment.
Effort type	Select the effort type to request a resource. • Hours - to request a resource or group by hourly basis. • FTE - to request a resource or group by FTE.

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New Resource Assignment form (continued)

Field	Description
	By default, one FTE is 8 hours. • Person days - to request a resource or group by Person days.
Effort	Enter the required effort count.
Name	Enter a custom name for resource assignment.
Task	Select the task from the list to associate the resource assignment.
Start date	Select the start date of the assignment using the calendar palette.
End date	Select the end date of the assignment using the calendar palette.
Resource status	Select the state of the resource assignment. • Pending • Approved • Unapproved • Unassigned
Rate override	Select this option to override the resource rate to match with your organization requirements.
Resource rate	Select the required currency and enter the resource rate.
Ready for review	Select an option from the list so that the resource manager can review the request for allocation. • Yes - if the resource assignment request is finalized and ready for resource manager's review for allocation. • No - if the resource assignment details are still being updated.
Notes	Enter details about the assignment to help resource manager or project manager with insights and additional information.

New Operational Assignment form

Fill in the following fields to create a operational assignment using Resource Management Workspace.

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New Operational Assignment form

Field	Description
Resource	Name of the resource.
Group	Name of the group to create resource assignment. If a resource is selected, the primary group name is populated by default.
Role	Primary role for the employee. If a resource is selected, the primary role is populated by default.
Skill	Primary skill of the resource. If a resource is selected, the primary role is populated by default.
Effort type	Select the effort type to request a resource. • Hours - to request a resource on hourly basis. • % Capacity - to request a certain percentage of capacity towards operational work.
Effort	Enter the required effort count.
Name	Enter a custom name for resource assignment.
Operational work type	Select the kind of operational work from the list. • KTLO • Admin • Meeting • Training • Out of office • External labor • Time off • Appointment • Phone call
Rate model	Select existing rate model to calculate planned and actual resource costs.
Start date	Select the start date of the assignment using the calendar palette.
End date	Select the end date of the assignment using the calendar palette.
Resource status	Select the state of the resource assignment.

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New Operational Assignment form (continued)

Field	Description
	• Pending • Approved • Unapproved • Unassigned
Ready for review	Select an option from the list so that the resource manager can review the request for allocation. • Yes - if the resource assignment request is finalized and ready for resource manager's review for allocation. • No - if the resource assignment details are still being updated.
Notes	Enter details about the assignment to help resource manager or project manager with insights and additional information.

Resource Management classic

The ServiceNow® Resource Management application enables resource requesters, such as project managers or change managers, to create resource plans, request resources, and analyze resource availability and utilization.

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Important:

Resource plans in Resource Management will no longer be available for new customers from future releases. Existing customers are encouraged to work on resource assignments which offers more flexibility in assigning and managing the work.

- New customers: Use Resource Management Workspace or Project Workspace to request resources for any work. Resource managers can use Resource Management Workspace to assign, approve, and manage the resource assignments.
- Existing customers:
  - If you already have resource management and working with resource plans, you can continue using it, but we encourage you to migrate and start using resource assignments.
  - For more information on migrating from resource plans to resource assignments, see migrate your resource plans and operational resource plans to resource assignments and starting using the Resource Management Workspace to continue managing your work.

Resource Managers are encouraged to use the Resource Management Workspace to assign, approve, and manage resource assignments. Resource Management Workspace is a dedicated workspace view for Resource Managers where you get insights about unassigned tasks, heatmap view of resource bandwidth, custom view to handle priority resource assignment requests, and so on.

Resource Management will not be enhanced for performance or functionality.

Resource managers use the application to allocate resources to tasks. The Resource Management application can be used in conjunction with any task on the platform, including project tasks, incidents, problems, or changes.

Watch this four-minute video to learn about the purpose of Resource Management application, creating resource plans, requesting and allocating resources, and analyzing resource availability and capacity for maximum resource utilization.

Introduction to Resource Management including the purpose, resource planning, resource request and allocation, and resource availability and capacity analysis for maximum resource utilization.

With the Resource Management application:

- Resource requesters can create resource plans that specify group or user resources required by tasks. They can verify resource availability and change their resource plans prior to requesting resources.
- Resource managers can view availability, existing allocations, and utilization for the requested resources and make allocations based on resource availability.
- Resource managers can change resource plan dates, resources, requested hours and proposed allocations for resource utilization and availability.

The Resource Management application is activated as part of the PPM Standard.

Resource management process

The resource plan is the key to understanding how resource management works.

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Important:
Resource plans in Resource Management will no longer be available for new customers from future releases.

You're encouraged to work on resource assignments which offers more flexibility using Resource Management Workspace or Project Workspace.

For more information about migrating from resource plans to resource assignments, see Migration of resource plans, operational resource plans, and cost plans.

Which approach applies to you?

Resource Plans vs. Resource Assignments

Criteria	Resource Plans (classic)	Resource Assignments (current)
When to use	You're an existing customer who has not yet migrated to resource assignments.	You're a new customer, or an existing customer who has migrated or is migrating to resource assignments.
Workspace	Classic Resource Management modules (Resource > Resource Plans)	Resource Management Workspace or Project Workspace
Key features	Group-based allocation, request/confirm/allocate workflow	Direct resource assignment, auto/manual distribution, inline approval, heatmap views
Documentation	Resource Plans topics in this section	Resource Management Workspace documentation

For detailed migration guidance, see Migrate from resource plans to resource assignments.

A user with the resource_user role can be a resource requester. Project managers are used as resource requesters in many examples because they typically have the resource_user role and work on the planning for a project's execution.

A resource requester creates a resource plan to request user or group resources for tasks. Any type of task, such as a change request, a task in the Agile scrum process, or a project task can be added to a resource plan.

After a resource plan is submitted, a resource manager reviews the plan, confirms the resources, and finally allocates resources for the plan. Once the resource plans are approved, the resources begin work.

Resource plans

Resource plans are the key element in resource management.

Important:
Resource plans in Resource Management will no longer be available for new customers from future releases.

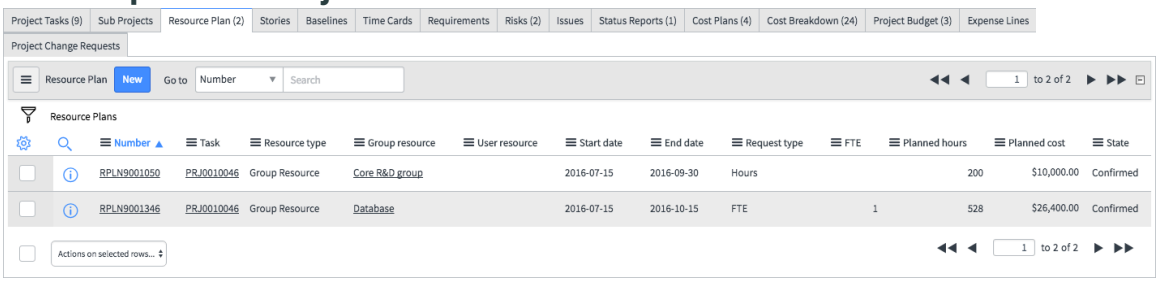
You're encouraged to work on resource assignments which offers more flexibility Create resource assignments and operation resource assignments in Resource Management Workspace using Resource Management Workspace or Project Workspace.

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Resource requesters, such as project managers, create resource plans to ask for resources, track effort, and track costs. Resource managers modify and approve resource plans before the plans are used.

All resource plans for a task appear on the **Resource Plan** related list of the Project task form, where resource requesters can access them.

Resource plan on the Project form



Resource plans progress through several states.

Resource plan states

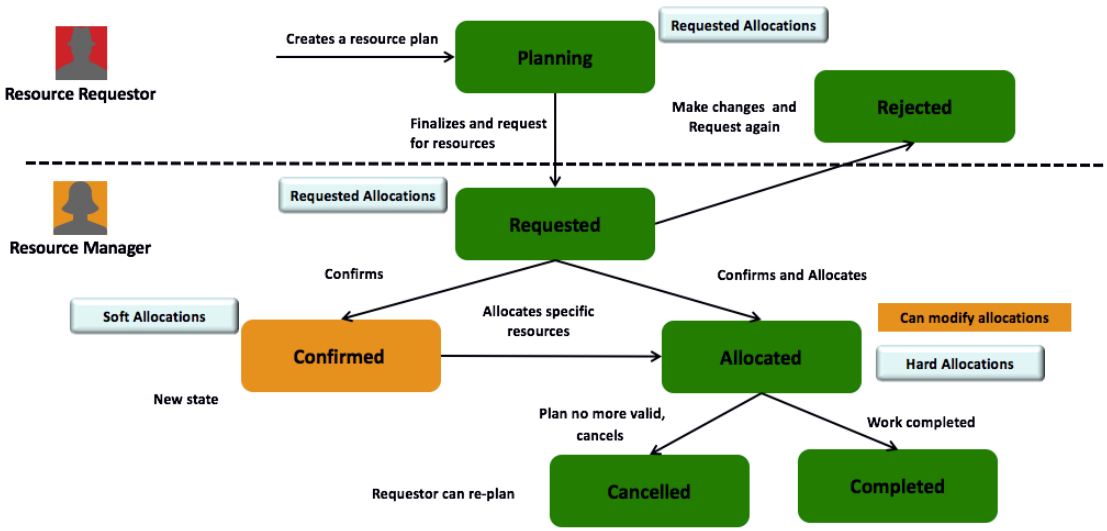
State	Description
Planning	Planning is the default state when a resource requester creates a resource plan. Any plan in this state can be edited. Requested Allocations are created when a resource plan is in Planning state. When a resource requester asks for a change to a plan that was already submitted, the plan reverts to the Planning state.
Requested	Resource requester submits a resource plan for resource managers review by selecting **Submit**. The resource plan then moves into the Requested state. Resource managers confirm and allocate resources or reject the plan, and finally close 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 then allocate some or all the requested users. If the task requires more than one user or groups, multiple resource plans can be created for the given task.
Rejected	Resource manager can reject a resource plan by selecting **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.

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Resource plan states (continued)

State	Description
	The resource plan moves into the Allocated state. A resource manager can only cancel, complete, or modify it. Soft allocations are converted to hard allocations when the resource plan moves to the Allocated state. **Note:** You can also set a plan to the Allocated state directly from the Requested state using **Confirm and Allocate** option.
Completed	After all associated tasks and projects are complete or canceled, an Allocated resource plan can be completed. This deletes all the resource allocations for the resource plan post the completion date.
Canceled	A plan can be canceled if the allocations are no longer required. This removes all past and future allocations. A canceled resource plan can be brought back to the Planning state if it has no past allocations. Resource plans in Planning, Requested, Confirmed, or Allocated state can be canceled.

States in Resource Management



Note: When a resource requester wants to change a plan that was already submitted for review (in Requested or Confirmed state but not yet allocated), the requester can request a change. The plan then moves back to the Planning state.

Resource Management supports time zones, which are important in the My Calendar and Resource Workbench modules.

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Modifications in Confirmed or Allocated state

Only a resource manager can modify a resource plan in the Confirmed or Allocated state.

The effects of modification in header area on a resource plan form in Confirmed state are:

- All soft allocations are deleted.
- Requested allocations are re-created with changed values.
- Resource plan moves back to the Requested state.

The effects of modification in header area on a resource plan form in Allocated state are:

- All resource allocations (soft and hard) are deleted.
- Requested allocations are re-created with changed values.
- Resource plan moves back to the Requested state.

The resource manager can also modify or delete the past dated resource allocations for Allocated resource plans if no actual hours are recorded for those resource allocation records. When a user submits a time card, upon approval of the time card, actual hours are updated for an allocation record.

Note:
The resource plan does not move back to the Requested state if the changes are made to allocation records only.

Request type

You can request a resource plan using one of the following options:

- Hourly: The request is in terms of the number of hours the resources are necessary.
- FTE: The request is in terms of an equivalent value that represents full-time work. When the request type is FTE, planned hours are calculated as: `Average Daily FTE * number of working days in resource plan * the FTE value`. The average daily FTE hours are specified in User and Group records. If there is no value specified at User or Group record, the average daily FTE hours is taken from the *`Default Average Daily FTE`* property.

  The number of working days is calculated based on the users schedule for a user resource or the default schedule for group resources. The default schedule is taken from the Default Schedule Name property.

  For example, say that the average daily FTE for a group is 40 hours, the resource plan period is from September 1 to September 10, and the FTE is 0.5.

  Assuming 8 working days during the plan period, planned hours = `40 * 8 * 0.5` =160 hours.

  Note:
  Capacity is not derived from FTE, but from schedules. Both FTE and schedules must be in synchronization with each other.

- Person days: The request is in terms of person days. When the request type is person days, planned hours are calculated as: `Total number of person days * Average Daily FTE Hours/Hours Per Person Day`.

  For example, say the Average Daily FTE Hours/Hours Per Person Day for a group is 8 hours, and the person days is 3. Then, planned hours = `8 * 3` = 24 hours.

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Resource plan costs

Resource plan costs can be tracked directly in the resource plan record. Resource plan costs are divided into planned, allocated, and actual.

If the **Rate override** option in a resource plan is selected, the hourly rate for calculating the corresponding resource plan cost is derived from the rate specified in the **Resource rate** field.

If a rate model is associated to the project or demand, the hourly rate is derived from the rate model. Whenever the hourly rates in the associated rate model change, you must recalculate the resource costs of the resource plan to reflect the new rates.

If rate model is not available, the hourly rate for calculating the corresponding resource plan cost is derived from labor rate card.

Projects and Demands can have multiple resource plans. The aggregated costs for all resources plans roll up to the **Planned Cost** and **Allocated Cost** fields and the **Resource Cost** section of both projects and demands.

Create a resource plan

You can create a resource plan from the Resource Management application for any task such as demand, project, project task, incident, problem, or change. You can edit and adjust the plan until you submit it for approval.

Before you begin

Important:
Resource plans in Resource Management will no longer be available for new customers from future releases.

You're encouraged migrate your existing resource plans to work on resource assignments which offers more flexibility Create resource assignments and operation resource assignments in Resource Management Workspace using Resource Management Workspace or Project Workspace.

Role required: resource_user, resource_manager, it_project_manager, demand_manager, admin

Procedure

1. Create a resource plan using one of the following options.

Option	Description
From Allocation Workbench	**a.** Navigate to **Resource** > **Resource Work bench** > **Allocation Workbench**. **b.** Click the required allocation board. **c.** In the Allocation workbench, click the **New Plan** located in the top-right corner.
From Resource tab in project workspace	**a.** Open a project record in project work space. See Access the new Project Work space. **b.** On the **Resources** tab, click **New**.

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Option	Description
From a project form	**a.** Navigate to **Project** > **Projects** > **Project Workspace**. **b.** Open a project record. **c.** In the **Resource Plan** related list, click **New**.
From a demand form	**a.** Navigate to **Demand** > **Demands** > **All**. **b.** Open a demand. **c.** In the **Resource Plans** related list, click **Manage**. **d.** On the Resource Plans page, click **New**.
From a project task	**a.** Navigate to **Project** > **Projects** > **Project Workspace**. **b.** Open a project record. **c.** Click the **Details** tab. **d.** In the **Project Tasks** related list, open a task. **e.** In the **Resource Plan** related list, click **New**.
From an existing resource plan	**a.** Open the resource plan record that you want to copy. **b.** In the related links, click **Copy Resource Plan**. **Note:** When you create a resource plan from an existing resource plan, all fields are copied to the new resource plan. The new plan is created in the Planning state.

2. On the Resource Plan form, fill the fields.
   For a field descriptions of the field names, see Resource Plan form.
3. Click **Save** on the form header.
   The resource plan is saved and placed in the Planning state.
4. Review update the values in the Resource Plan form tabs.
   For a field description of the field names, see Resource Plan form tabs.

Note:
If the assigned rate model is removed or replaced, or the hourly rates in the rate model are changed, the cost fields on the associated resource plans are not recalculated automatically. You must recalculate the resource costs of the resource plan to reflect new rates from the rate model.

However, if any of the fields affecting the cost are updated on the resource plan, the rate model is invoked for getting the hourly rates. For example, extending a resource plan by modifying the end date of the resource plan invokes the rate model as there can be new rates available.

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Result

- The resource plan is saved and placed in the Planning state.
- When the resource plan is created from resource grid, the plan appears as top row in the resource plan list of the project or demand. The plan has one of the following prefixes:
  - [G] for a resource plan created for a group.
  - [R] for a role resource plan created for a role.
  - [U] for a user resource plan created for a user.

  The prefix is based on the type of resource selected in the **Resource type** field.
- The resource plan which is created last appears at the top in the resource plan list of the project or demand.

What to do next

Use the Resource Plan related links and lists to work on the resource plans, workbenches, or to modify the existing request allocations.

Use Resource Finder to analyze resource availability

Search and analyze resource availability using the Resource Finder, so that you can create resource plans for a project or demand.

Before you begin

Role required: it_project_manager, it_demand_manager, or resource_manager

About this task

In the Resource Finder, search for the resources that you need, and create a plan for the selected resources.

- Steps 1 and 2 take you to the resource finder.
- Step 3 provides guidance on different options to filter and analyze the resources availability. Choose the options that suit your needs.
- Step 4 shows how to create a new resource plan for the selected resources.

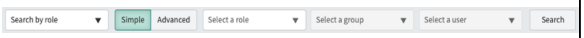
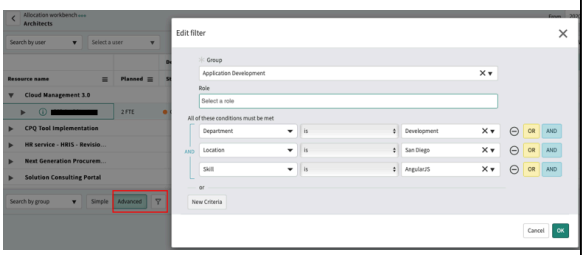
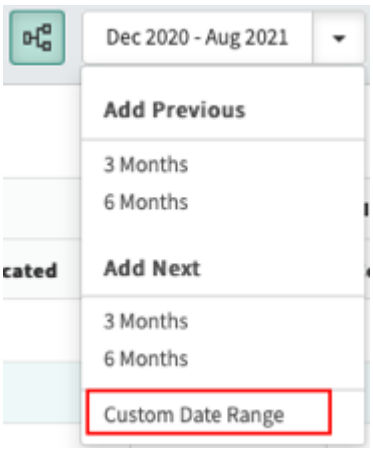
Procedure

1. Open the Resource Plans page for a project or demand.
2. Select the project or demand in the resource grid section and click the resource finder icon ().

   The resource finder section opens at the bottom of the page. A list of up to 50 records are displayed initially. If you have more than 50 resources, you can load them by clicking **Get More**.
3. Use the following options to filter and analyze the capacity of the resources.

Option	Description
Display available or over allocated resources	Using the Show/Hide menu () to filter resources by available or over allocated.

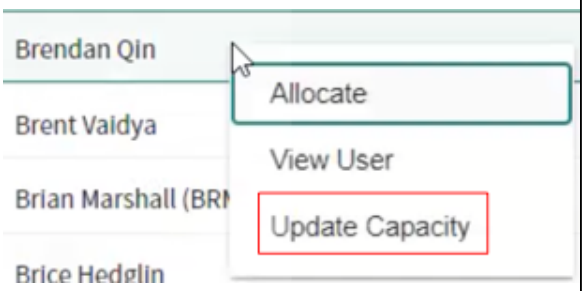
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Option	Description
Perform a simple search	Search the resources by group, role, or user attributes, by selecting the search criteria. 
Build your own search criteria	Use the advanced search to add your filter conditions. For example, select **Search by group**, click **Advanced**, then click the Advanced search filter icon ( ). Here you can add conditions to filter this group further. **Note:** While adding filters, ensure that you do not add an AND condition for different values of the same attribute. For example, do not filter the user group with conditions for Skill **X** AND Skill **Y**. 
View the availability of the resources for an extended duration	Use the options from the date range selector. From the Xanadu release onwards, you can select a custom date range.  The value of the property *Maximum time duration in Resource Finder in months* determines the maximum duration

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Option	Description
	for which the resource details are displayed in the resource finder.
Analyze the resources list	Use the Configuration menu ( ) to analyze different constraints such as the capacity, availability, actual hours, and others for different time periods. By default, only the Availability hours are displayed. To view other details, select Detailed View ( ), and select the required columns from the Configuration menu ( ).  Displaying the requested hours for a user group or role helps you understand immediately if you need to fulfil any resource requests and to do so, if you have enough capacity for that user group or role. The **Requested** column would not be available in the Configuration menu under the following conditions. ○ Filtering the resource list further using simple or advanced filters ○ Using the resource finder in the availability view ○ Using the show available or show over allocated options from the Show/Hide menu Even if the column is already enabled, but any of the above conditions are later met, the **Requested** column is disabled automatically.

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Option	Description
	All non-project events created for a user from the calender appear as Operational Work for the user in Resource Finder.
Update the capacity of a resource	Right-click on the user and select **Update Capacity**. 

4. Select the resources you want to create resource plans for and click **Add New Plan**.

Result

- The resource plan is created in the Planning state with zero planned hours.
- The resource plan appears as a row at the top in the resource plan list of the project or demand. Based on the type of resource selected in finder, the resource plan has one of the following prefixes:
  - [G] for a resource plan created for a group.
  - [R] for a role resource plan created for a role.
  - [U] for a user resource plan created for a user.

> **Note:**
> The resource plan that is created last appears at the top in the resource plan list of a project or demand.

What to do next

- Update the planned hours for the resource plan using the resource grid.
- To view and update more details for the resource plan, click the information icon (ⓘ) in the beginning of the resource plan row.
- You can now request the resource plan.

Create an operational resource plan

Create an operational resource plan and allocate a certain portion of your team capacity for operational work, such as administration, meeting, or training.

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Before you begin

Important:
Resource plans in Resource Management will no longer be available for new customers from future releases.

You're encouraged migrate your existing resource plans to work on resource assignments which offers more flexibility and Create resource assignments and operation resource assignments in Resource Management Workspace using Resource Management Workspace or Project Workspace.

Role required: resource_user, resource_manager, it_project_manager, demand_manager, admin

About this task
Create a resource plan for an operational work type such as Meeting, Training, Admin work, or Phone call.

For more information on operational resource plans, see Operational Resource Plan - All That You Need to Know .

Procedure

1. Navigate to **All** > **Resource** > **Resource Plans** > **Create New Operational Plan**.
2. On the Resource form, fill in the fields.
   For a description of the field names, see Resource form.
3. Select **Save**.

Related topics

Map a time card category with operational work types

Request resources

After you create a resource plan, request resources from the resource manager.

Before you begin
Role required: it_project_manager, resource_user

About this task

Note:
If the resource type in the resource plan is a group, you can request resources only if that group has active members.

Procedure

1. Navigate to **All** > **Resource** > **Resource Plans** > **All**.
2. Open a resource plan that is in the Planning state.
3. Select **Request**.

   You can also request resources from the Allocation Workbench.

Result
The resource plan moves to the Requested state and is ready for review by the resource manager.

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Confirm a resource plan

As a resource manager, you can confirm or block the resources after a resource plan is requested. The resource plan must be in the Requested state to be confirmed.

Before you begin

Important:
Resource plans in Resource Management will no longer be available for new customers from future releases.

You're encouraged migrate your existing resource plans to work on resource assignments which offers more flexibility and Create resource assignments and operation resource assignments in Resource Management Workspace using Resource Management Workspace or Project Workspace.

Resource managers can view and assign the unassigned resource assignments using Resource Management Workspace.

Role required: resource_manager

About this task

You can modify or cancel a resource plan that is in the Confirmed state.

For a resource plan with the resource type as group, you can confirm resources only if the specified group has active members.

Note:
You can also confirm resource plans from the Allocation Workbench.

Procedure

1. Navigate to **All** > **Resource** > **Resource Plans** > **Requested**.
2. Open the resource plan that you want to confirm and select **Confirm**.

Result

The resource plan moves to the Confirmed state and soft allocations are created.

Confirm and allocate a resource plan

After the resource plan is requested, as a resource manager, you can directly allocate the resources. To confirm and allocate, the resource plan must be in the Requested state.

Before you begin

Important:
Resource plans in Resource Management will no longer be available for new customers from future releases.

You're encouraged migrate your existing resource plans to work on resource assignments which offers more flexibility and Create resource assignments and operation resource assignments in Resource Management Workspace using Resource Management Workspace or Project Workspace.

Resource managers can assign and approve the unassigned resource assignments using Resource Management Workspace.

Role required: resource_manager

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About this task
Modify or cancel a resource plan that is in the Allocated state.

If the resource type in a resource plan is a group, you can request resources only if that group has active members.

Note:
For resource plans associated to projects or demands, you can confirm and allocate these plans using the Allocation Workbench too.

Procedure
1. Navigate to **All** > **Resource** > **Resource Plans** > **Requested**.
2. Open the resource plan (Requested) that you want to confirm and allocate, and select **Confirm and Allocate**.

Result
The resource plan automatically moves to the Allocated state from the Requested state. Soft allocations are converted to hard allocations when the resource plan moves to the Allocated state.

Any errors or warnings during allocations are logged in the Resource Plan Logs related list on the Resource Plan form. The log is generated if a resource is allocated over 24 hours for a given day. You can review these logs to take correct actions for further resource allocation.

Request a change to a resource plan

Request a change to the resource plan to modify a resource plan after you've submitted it for review.

Before you begin
Role required: resource_user

About this task
You can change the resource plans that are in the Requested or Confirmed state. To change the form fields of the plan, you first must request a change to the resource plan. However, you can adjust the requested allocations directly on the plan without requesting for a change. These adjustments are rolled-up to the resource plan.

Procedure
1. Navigate to **All** > **Resource** > **Resource Plans** > **All**.
2. Open a resource plan that is in the Requested or Confirmed and select **Request Change**.

   You can also request change from the Allocation Workbench.

Result
The resource plan moves back to the Planning state and has the form fields enabled to make the required changes.

Recalculate costs of a resource plan of a project or demand

Recalculate the resource costs of an individual resource plan for a project or demand whenever the hourly rates change in the associated rate model.

Before you begin
Ensure the following setup:

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- The project or demand must have an active rate model assigned.
- The resource plan must be in either Planned, Requested, Confirmed, or Allocated states.

Role required: resource_manager

About this task

To update the costs of all the resource plans of a project or demand in one go, you can use the **Recalculate Resource Costs** option from the project form or demand form.

Procedure

1. To open a resource plan of a project or demand, perform one of the following actions.
   - Navigate to **Project** > **Projects** > **All**, and open a project.
   - Navigate to **Demand** > **Demands** > **All**, and open a demand.
2. From the **Resource Plans** related list, open a resource plan for which you want to recalculate the costs.
3. On the Resource Plan form, select the **Recalculate Resource Cost** related link.
4. In the Recalculate Resource Costs dialog box, specify the recalculation period in the **Start date** and **End date** fields.
   By default, the **Start date** field has the current date and the **End date** field has the end date of the resource plan.
5. To recalculate the planned cost, select the **Include planned costs** option.
   The **Include planned costs** option is available for a resource plan in the Confirmed or Allocated state. The option isn't selected by default.
6. Select **OK**.

Result

- Recalculates the selected resource costs based on the latest hourly rates derived from the rate model associated with the project or demand.
- Updates the recalculated resource costs on the respective cost fields on the resource plan form and the **Resource Plans** related list of the associated project or demand.
- Reflects the revised values on the respective cost fields of associated project or demand.

Update cost plan related to a resource plan

If a resource plan is associated to a project, project task, or demand and has a related cost plan, then a requester or a resource manager can update the related cost plan after updating the resource plan.

Before you begin

Role required: resource_user or resource_manager or it_project_manager or it_demand_manager

About this task

If a resource plan does not have a related cost plan, the **Update Cost Plan** related link is not displayed for the resource plan.

Procedure

1. Save the updates to the resource plan.
2. Click the **Update Cost Plan** related link.

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The cost plan associated to a resource plan is automatically updated as soon as the **Planned cost** in the resource plan is updated. The planned cost on resource plan gets updated when there is a change in:

- Planned hours
- User
- State
- Start and end dates

Result

The cost plan associated to the resource plan is updated as follows:

- If the resource plan is in Planning or Requested state, planned hours is updated in the cost plan.
- If the resource plan is in Confirmed/Allocated state and the Confirmed/Allocated hours are less than planned hours, then the higher of the planned cost and Confirmed/Allocated cost is updated in the cost plan.
- If the resource plan is in Confirmed/Allocated state and the Confirmed/Allocated hours are equal to or more than planned hours, then the Confirmed/Allocated cost is updated in the cost plan.

Cost from resource plan will be interfaced to the unit_cost field on the Cost Plan [cost_plan] table.

Complete a resource plan

After all associated tasks and projects are complete or canceled, a resource manager can move the resource plan to the **Complete** state, which closes it.

Before you begin

The resource plan to be completed must be in the Allocated state.

Role required: resource_manager

About this task

Project and demand managers can complete resource plans from a project, project task, planning console, or demand.

Note:
You can also complete and close a resource plan from the Allocation Workbench.

Procedure

1. Navigate to **All** > **Resource** > **Resource Plans** > **Allocated**.
2. Open the resource plan that you want to complete.
3. Verify all the information on the form.

   Note:
   The **Actual Hours** and **Actual Cost** fields show the time spent on plan tasks and the resource costs. These fields are derived from time card information and can't be edited on the resource plan.

4. **Optional:** Add notes.
5. Select **Complete**.

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6. In the **Confirm** dialog box, select the completion date of the resource plan and select **Yes**.

   By default, the system date or resource plan end date, whichever is earlier, is populated in **Completion Date**.

   Note:
   The **Completion Date** can't be earlier than the resource plan start date.

Result

- The resource plan moves to the Completed state.
- If the completion date is earlier than the resource plan end date, the end date of the resource plan is updated with the completion date. If the completion date was entered later than the resource plan end date, the resource plan end date is retained.
- All the requested and resource allocations for the resource plan post the completion date are deleted. If there are any actual hours logged against an allocation, that allocation record isn't deleted. But the allocated hours become zero and the actual hours are retained. The available and allocated hours for the resources are also updated in the aggregate tables.

Example:
Example 1: A resource plan of Allocation type **Monthly** from 1 November to 31 January is completed on 15 December. On completion,

- the resource allocation entry for January is deleted from the [Resource_Allocation] table.
- the resource allocation end date for December is updated to the completion date of the resource plan.
- the entries in the [Resource_Allocation_Daily] table for the December month post the completion date are deleted.

Example 2: If the same resource plan has Allocation type as **Planned Duration**, no allocations are deleted, and the end date of the allocation is updated to the completion date.

Complete a resource plan from a project, planning console, or demand record

If a project or a project task is marked Closed, the project manager can complete the associated Allocated resource plans. Similarly, the demand manager can complete the resource plans for a Closed or Deferred demand.

Before you begin
The resource plan to be completed must be in the Allocated state.

Role required: it_project_manager or it_demand_manager

About this task
When a project or a project task moves to Closed Complete, Closed Incomplete or Closed Skipped state, the system prompts a message on the project and project task forms, and in the planning console for completing the Allocated resource plans if the following conditions is met.

- Corresponding resource plan is in the Allocated state.
- Resource plan start date is less than or equal to the project or task actual end date.

A similar message for completing the resource plans appears on the Demand form when a demand moves to Closed or Deferred state.

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Procedure

1. Open a project, task, or demand record in the Closed state.

Option	Description
Open a Closed project record	**a.** Navigate to **Project** > **Projects** > **Project Workspace**. **b.** Open the project record in the Closed state. **c.** Select the **Details** tab to display the project form.
Open a Closed project task record	**a.** Navigate to **Project** > **Projects** > **Project Workspace**. **b.** Open the required project record. **c.** In the **Project Tasks** related list, open the project task record in the Closed state.
Open a Closed project in Planning Console	**a.** Navigate to **Project** > **Projects** > **Project Workspace**. **b.** Open the project record in the Closed state. **c.** Select the **Planning** tab to display the project in planning console.
Open a Closed or Deferred demand record	**a.** Navigate to **Demand** > **Demands** > **All**. **b.** Open the demand record in the Closed or Deferred state.

The message for completing the associated resource plans appears at the top of the record.

Message for completing a resource plan



Note:
In the Planning Console, irrespective of the Closed state of the project tasks, the message appears only when the project is in Closed state.

2. To open the list of resource plans to be completed, select the link in the message.

Note:
In Planning Console, alternatively right-click the project and select **Complete Resource Plans**.

- The list contains only those resource plans for the record that should be completed.
- If the list is opened from the message link on a Project form, the resource plans for the project and project task are listed.
- If the list is opened from the message link on a Project task form, only the resource plans for the project task are listed.

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3. In the list, select the resource plan to be completed, and select **Complete**.
4. In the **Confirm** dialog box, select the completion date of the resource plan and select **Yes**.

   By default, the system date or resource plan end date, whichever is earlier, is populated in **Completion Date**.

   Note:
   The **Completion Date** cannot be earlier than the resource plan start date.

Result

- The selected resource plan moves to the Completed state.
- If the completion date is earlier than the resource plan end date, the end date of the resource plan is updated with the completion date. If the completion date was entered later than the resource plan end date, the resource plan end date is retained.
- All the requested and resource allocations for the resource plan that are past the completion date are deleted. If there are any actual hours logged against an allocation, that allocation record is not deleted. But the allocated hours become zero and the actual hours are retained. The available and allocated hours for the resources are also updated in the aggregate tables.

Cancel a resource plan

If a resource plan is no longer needed, you can cancel it which also cancels its past and future allocations.

Before you begin

The resource plan to be canceled must be in the Planning, Requested, Confirmed, or Allocated state.

Role required: resource_manager

About this task

Project and demand managers can also cancel resource plans from a project, project task, planning console, or demand.

Note:
You can also cancel a resource plan from the Allocation Workbench.

Procedure

1. Navigate to **All** > **Resource** > **Resource Plans** > **All**.
2. Open the resource plan record that you want to cancel.
3. On the form header, select **Cancel**.

Result

- The resource plan moves into the Cancelled state.
- All past and future allocations for the resource plan are also canceled. If there are any actual hours logged against an allocation, that allocation isn't deleted. But the allocated hours become zero and the actual hours are retained.

What to do next

If you want to make changes and use the plan again, edit a canceled plan. To move the resource plan back to Planning state, select **Re-plan**.

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Note:
The state of a resource plan can be changed back from Cancelled to Planning, only if it has no past allocations.

Cancel a resource plan from a project, planning console, or demand record

If a project or a project task is marked Closed, the project manager can cancel the associated future resource plans. Similarly, the demand manager can cancel the future resource plans for a Closed or Deferred demand.

Before you begin

The resource plan to be canceled must be in Confirmed, Planning, or Requested state. An Allocated resource plan can be canceled if the resource plan start date is later than the project, task, or demand end date.

Role required: it_project_manager or it_demand_manager

About this task

When a project or a project task moves to Closed Complete, Closed Incomplete or Closed Skipped state, the system prompts a message on the project and project task forms, and in the planning console for canceling the resource plans if one of the following conditions is met.

- Corresponding resource plan is in Confirmed, Planning, or Requested state.
- Resource plan is in Allocated state with start date later than the project or task end date.

A similar message for canceling the resource plans appears on the demand form when a demand moves to Closed or Deferred state.

Procedure

1. Open a project, task, or demand record in the Closed state.

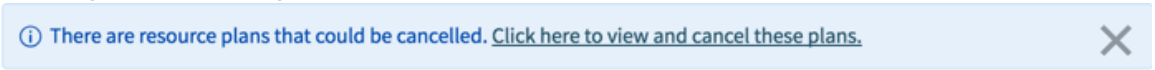
Option	Description
Open a Closed project record	**a.** Navigate to **All** > **Project** > **Projects** > **Project Workspace**. **b.** Open the project record in the Closed state. **c.** Click the **Details** tab to display the project form.
Open a Closed project task record	**a.** Navigate to **All** > **Project** > **Projects** > **Project Workspace**. **b.** Open the required project record. **c.** In the **Project Tasks** related list, open the project task record in the Closed state.
Open a Closed project in Planning Console	**a.** Navigate to **All** > **Project** > **Projects** > **Project Workspace**. **b.** Open the project record in the Closed state. **c.** Click the **Planning** tab to display the project in planning console.

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Option	Description
Open a Closed or Deferred demand record	**a.** Navigate to **All** > **Demand** > **Demands** > **All**. **b.** Open the demand record in the Closed or Deferred state.

The message for canceling the associated resource plans appears at the top of the record.

Message for canceling a resource plan



Note:
In the Planning Console, irrespective of the Closed state of the project tasks, the message appears only when the project is in Closed state.

2. To open the list of resource plans to be canceled, click the link in the message.

Note:
In the Planning Console, alternatively right-click the project and select **Cancel Resource Plans** .

   - The list contains only those resource plans for the record that can be canceled.
   - If the list is opened from the message link on a Project form, the resource plans for the project and project task are listed.
   - If the list is opened from the message link on a Project task form, only the resource plans for the project task are listed.

3. In the list, select the resource plan to be canceled, and click **Cancel**.

Result

- The selected resource plan moves to the Canceled state.
- All past and future allocations for the resource plan are canceled. If there are any actual hours logged against an allocation, that allocation is deleted. In this case, Allocated hours become zero and the actual hours are retained as is.

Delete a resource plan

Deleting a plan also deletes all associated resource allocations.

Before you begin

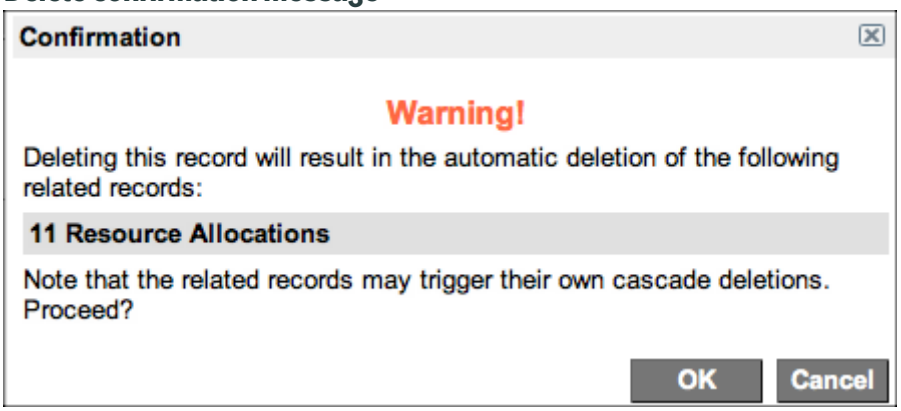
Role required: resource_manager

Procedure

1. Navigate to **All** > **Resource** > **Resource Plans** > **All**.
2. Open a resource plan and select **Delete** on the form header.
   A confirmation message appears.

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Delete confirmation message



3. Select **OK**.
   The resource plan and all the associated allocations are removed.

Extend a resource plan

You can extend the date of an allocated resource plan and allocate resources for the extended period.

Before you begin

Important:
Resource plans in Resource Management will no longer be available for new customers from future releases.

You're encouraged migrate your existing resource plans to work on resource assignments which offers more flexibility and start using Resource Management Workspace.

Resource requester can extend an assigned or unassigned resource assignment using Resource Management Workspace.

Role required: resource_manager

About this task

Assume that work on a project has started, but there is a need to extend the date of an allocated resource plan because the project has been extended. In this scenario, you can extend the date of the allocated resource plan. The new date by which the resource plan is extended does not have any impact on the existing allocated hours. While extending the resource plan, you can specify the new end date and the request type. Based on the request type selected, the required allocated hours are auto-filled.

For example, assume that you allocated 100 hours for 2 months, 50 hours for each month. Now, you want to extend the resource plan by one month. For the extended month, allocation records are created based on the request type selected.

Procedure

1. Navigate to **All** > **Resource** > **Resource Plans** > **All**.
2. Open a resource plan and select **Extend Resource Plan**.
3. Select **OK**.
4. In the Extend resource plan dialog box, fill in the fields.
   For a description of the field names, see Extend resource plan form.

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Result

- The end date of the resource plan is updated.
- The **Extension** field displays the state as Allocated.
- For the extended period, allocation records are created based on the request type selected.
- Number of requested FTE or hours or person days is divided equally for each allocation period and is pre-filled in each allocation record.
- Extending the resource plan invokes the rate model for getting the hourly rates.

Request extension of an allocated resource plan

As a project manager, you can request the extension of an allocated resource plan.

Before you begin

Important:
Resource plans in Resource Management will no longer be available for new customers from future releases.

You're encouraged migrate your existing resource plans to work on resource assignments which offers more flexibility and start using Resource Management Workspace.

Resource requester can extend a resource assignment using Resource Management Workspace.

Role required: it_project_manager, resource_user

About this task

Assume that a project, which has resources allocated, gets delayed by one month. As a project manager, you can request for the extension of the resource plan if you need resources for the period. This option is available only when the resource plan is in the Allocated state.

Procedure

1. Navigate to **All** > **Resource** > **Resource Plans** > **All**.

   If you are accessing the resource plan from the Allocation Workbench, navigate to **Resource > Resource Workbench > Allocation Workbench**, and open the allocation board whose resource plan you want to extend.

2. Open a resource plan and select **Request Extension**.
3. On the Request Extension from, fill the fields.
   For a description of the field values, see Request Extension form.

Result

The end date of the resource plan is updated and the **Extension** field is set to **Requested**.

What to do next

Allocate resources for the extended period.

Allocate resources for the extended period

As a resource manager, you can allocate resources for the extended period.

Before you begin

Role required: resource_manager

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About this task
After a project manager submits a request to extend the allocated resource plan, the resource manager receives a message at the top of the resource plan. The resource manager then reviews and allocates resources for the extended period.

Procedure
1. Navigate to **All** > **Resource** > **Resource Plans** > **All**.
2. Open the resource plan.
3. Confirm the extension in one of the following ways.
   - From the Resource Allocation related list, review and update the value for the **Requested Hours**, **FTE**, or **Person Days** fields.
   - Select **Allocated** in the **Extension** field.

Result
Resources are allocated for the extended period.

Any errors or warnings during allocations are logged in the Resource Plan Logs related list on the Resource Plan form. The log is generated if a resource is allocated over 24 hours for a given day. You can review these logs to take correct actions for further resource allocation.

Reduce the duration of a resource plan

Reduce the duration of an allocated or confirmed resource plan and deallocate resources in one action without having to do it individually for each resource.

Before you begin

Important:
Resource plans in Resource Management will no longer be available for new customers from future releases.

You're encouraged migrate your existing resource plans to work on resource assignments which offers more flexibility and start using Resource Management Workspace.

Resource requester can move an assigned or unassigned resource assignment using Resource Management Workspace.

Role required: resource_manager

About this task
You can reduce an allocated or confirmed resource plan only if the resource plan's end date is later than the current date.

You can reduce the duration of an operational resource plan only if its state is allocated.

Procedure
1. Navigate to **All** > **Resource** > **Resource Plans** > **All**.
2. Open a resource plan and select **Reduce**.
   Reducing the resource plan end date releases all resources by deleting resource allocations after the new end date.

   If no actuals are posted for the future in the resource plan, then all the allocated or confirmed hours of the resources will be released when you reduce the resource plan.

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If actuals are posted for the future, then the resource plan end date is updated to the future date on which actuals are present, and all allocated or confirmed hours of all the resources from the date on which actuals are present to the original end date are released.

3. Enter the new end date of the resource plan in the **End date** field.
4. Select **Yes** in the confirmation message.

Result

- The end date of the resource plan is updated to the new reduced end date.
- The state of the resource plan remains the same.
- If no actuals are posted for the future in the resource plan, all allocated or confirmed hours of the resources are released.
- If actuals are posted for the future, then the resource plan end date is updated to the future date on which actuals are present, and all the allocated or confirmed hours of all the resources from the date on which actuals are present to the original end date are released.

Example: Resource allocation concerning actuals

Say a resource plan was created for 1 FTE from January 1, 2021, to December 31, 2021, and on March 1, 2021, the resource plan end date was updated to March 1, 2021. Then, all the allocated or confirmed hours of the resources on this plan between March 1, 2021, to December 31, 2021, would be released. If actuals are posted for the future, for example, May 25, 2021, then the resource plan end date will be updated to May 25, 2021, and all confirmed or allocated hours between March 1, 2021 to December 31, 2021 will be released.

Time zones in resource plans

Time zones are important in resource management when the users and groups doing the resource tasks are located in different locations.

Users maintain their time in the My Calendar module and resource managers use the resource workbench or resource plan to assign tasks to various users.

All users are assigned a schedule. If a user schedule changes, all time calculations change automatically. The schedules can be floating or time zone-specific.

- A floating schedule is the same in any time zone. For example, if a resource manager in Amsterdam sets a floating schedule for 08:00–17:00, a user in San Jose sees the schedule as 08:00–17:00.
- When a schedule is defined in a specific time zone, users in different time zones see the schedule with their own time zone applied. For example, if the resource manager sets a time zone-specific schedule for 08:00–17:00 in Amsterdam, the San Jose user sees the schedule as 23:00 of the previous day to 07:00 on the current day because the San Jose time zone is nine hours behind the Amsterdam time zone.

Associate a time card with a resource plan

If one resource is allocated to identically named tasks in two resource plans, use the following procedure to specify the resource plan the time card should be allocated to.

Before you begin

Role required: resource_manager

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About this task

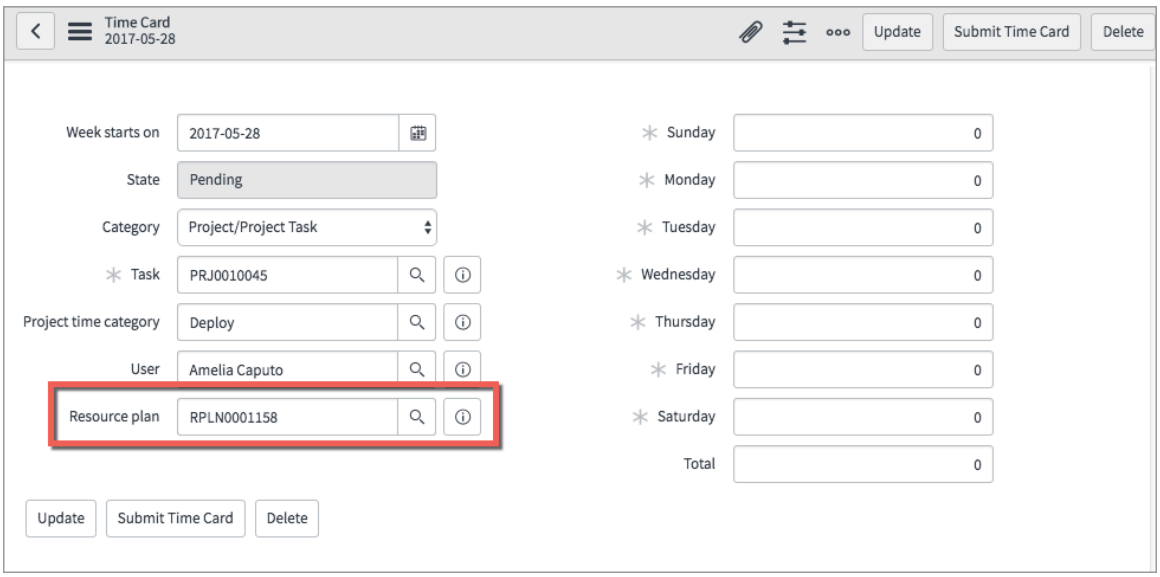
- A resource plan can be associated with a time card only if the resource plan contains hard allocations for the user.
- If a resource plan isn't associated manually to a time card, then a resource plan is auto-associated. The auto-association is done based on the selected **Task** in the time card.

Procedure

1. Navigate to the **All** > **Time Cards** > **All**.
2. Select a time card.
3. Configure the form to add the **Resource plan** field.
4. In the **Resource plan** field, select the plan to which the time card should be allocated.

   Only resource plans that contain the selected task are listed.

Time Card with Resource Plan



5. Select **Update**.

Migration of resource plans, operational resource plans, and cost plans

Effortlessly migrate resource plans to resource assignments and the associated cost plans to attribute-based labor costs of your projects or demands and easily work on resource allocations using Project Workspace.

Tip:
Resource Managers are encouraged to view the Resource Management Workspace boot camp to learn about Resource Management Migration to the Next Experience.

Resource plans to resource assignments

Migrate all the resource plans of a project or demand to attribute-based resource assignments depending on the planning attributes to easily manage your projects on Next experience using Project Workspace and Capacity Planning.

Group, Skill, and Role are the primary attributes enabled for Resource Management depending on which the resource plans are migrated to resource assignments.

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Important:
Resource plans in Planning, Requested, Confirmed, Allocated, Rejected, and Completed states are only migrated to Resource assignments. Resource plans in Canceled and In-progress states are not migrated.

Let us see how the status of the resource plans are mapped to the status of resource assignments.

Status mapping between resource plans and resource assignments

Resource plan status	Resource assignments status
Planned or Requested	Unassigned
Allocated	Approved
Confirmed	Approved
Completed	Approved
Cancelled or In-progress	Resource plan is not migrated
Rejected	Unapproved

When a resource plan is migrated, a corresponding resource assignment is created based on the primary attributes from the resource plan. Resource assignments do not support custom selection of allocation type and allocation spread.

With the migration of resource plans:

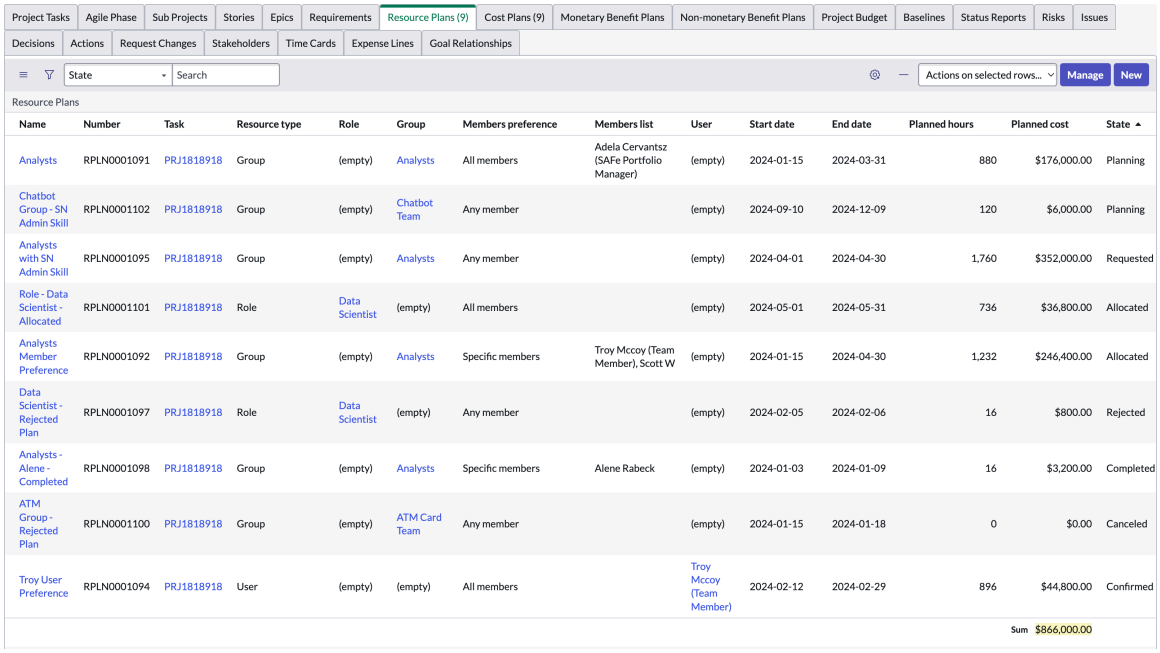
- Resource plans in Planning or Requested states, resource assignments are created based on the planned dates and planned duration with their default state as Unassigned.
- Allocation type is set to planned duration.
- Allocation spread is always Even.
- Existing resource allocations are deleted and created again to accommodate resource allocations with the resource name and planned duration.
- The allocated costs and allocated hours are copied to planned costs and planned hours.
- Actual hours for the resource plans in Confirmed and Allocated states are retained with the resource plans.

Note:
Only one resource assignment is created for every unique combination of primary attributes, Group, Skill, and Role, and one for every user if the resource plans are created with selected member preferences. After migration, if you create a resource assignments with any of the existing combinations, the available resource assignments are updated with the new requests.

Example: Migration of Resource plans to Resource assignments

Resource plans in different states.

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Name	Number	Task	Resource type	Role	Group	Members preference	Members list	User	Start date	End date	Planned hours	Planned cost	State
Analysts	RPLN0001091	PRJ1818918	Group	(empty)	Analysts	All members	Adela Cervantsz (SAFe Portfolio Manager)	(empty)	2024-01-15	2024-03-31	880	$176,000.00	Planning
Chatbot Group - SN Admin Skill	RPLN0001102	PRJ1818918	Group	(empty)	Chatbot Team	Any member		(empty)	2024-09-10	2024-12-09	120	$6,000.00	Planning
Analysts with SN Admin Skill	RPLN0001095	PRJ1818918	Group	(empty)	Analysts	Any member		(empty)	2024-04-01	2024-04-30	1,760	$352,000.00	Requested
Role - Data Scientist - Allocated	RPLN0001101	PRJ1818918	Role	Data Scientist	(empty)	All members		(empty)	2024-05-01	2024-05-31	736	$36,800.00	Allocated
Analysts Member Preference	RPLN0001092	PRJ1818918	Group	(empty)	Analysts	Specific members	Troy Mccoy (Team Member), Scott W	(empty)	2024-01-15	2024-04-30	1,232	$246,400.00	Allocated
Data Scientist - Rejected Plan	RPLN0001097	PRJ1818918	Role	Data Scientist	(empty)	Any member		(empty)	2024-02-05	2024-02-06	16	$800.00	Rejected
Analysts - Alene - Completed	RPLN0001098	PRJ1818918	Group	(empty)	Analysts	Specific members	Alene Rabeck	(empty)	2024-01-03	2024-01-09	16	$3,200.00	Completed
ATM Group - Rejected Plan	RPLN0001100	PRJ1818918	Group	(empty)	ATM Card Team	Any member		(empty)	2024-01-15	2024-01-18	0	$0.00	Canceled
Troy User Preference	RPLN0001094	PRJ1818918	User	(empty)	(empty)	All members		Troy Mccoy (Team Member)	2024-02-12	2024-02-29	896	$44,800.00	Confirmed
											Sum	$866,000.00	

Resource plans migrated as resource assignments.

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Number	Resource	Group	Role	Skill	Effort type	Effort	Start date	End date	Resource status	Planning item	Resource rate	Resource plan	Plan type
RA0001621	(empty)	Analysts	(empty)	(empty)	FTE	2	2024-01-15	2024-03-31	Unassigned	Migrate resource plans	$0.00	RPLN0001091	Task
RA0001622	(empty)	Chatbot Team	(empty)	ServiceNow Administration	Hours	120	2024-09-10	2024-12-09	Unassigned	Migrate resource plans	$0.00	RPLN0001102	Task
RA0001623	(empty)	Analysts	(empty)	ServiceNow Administration	FTE	10	2024-04-01	2024-04-30	Unassigned	Migrate resource plans	$0.00	RPLN0001095	Task
RA0001620	(empty)	(empty)	Data Scientist	(empty)	FTE	1	2024-02-05	2024-02-06	Unapproved	Migrate resource plans	$0.00	RPLN0001097	Task
RA0001619	Troy Mccoy (Team Member)	Analysts	(empty)	(empty)	FTE	0.99	2024-01-15	2024-04-30	Approved	Migrate resource plans	$0.00	RPLN0001092	Task
RA0001618	Scott W	Analysts	(empty)	(empty)	FTE	1	2024-01-15	2024-04-30	Approved	Migrate resource plans	$0.00	RPLN0001092	Task
RA0001617	Shane McConnell	(empty)	Data Scientist	(empty)	FTE	0.16	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001616	Salem O'Connell	(empty)	Data Scientist	(empty)	FTE	0.16	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001615	Nicolas Butler	(empty)	Data Scientist	(empty)	FTE	0.16	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001613	Lily Schroeder	(empty)	Data Scientist	(empty)	FTE	0.16	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001614	Madilynn Vance	(empty)	Data Scientist	(empty)	FTE	0.16	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001612	Leighton Olson	(empty)	Data Scientist	(empty)	FTE	0.16	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001611	Lauryn King	(empty)	Data Scientist	(empty)	FTE	0.16	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001610	Lana Gordon	(empty)	Data Scientist	(empty)	FTE	0.16	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001609	Kyrie Owens	(empty)	Data Scientist	(empty)	FTE	0.12	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001608	Karter Thornton	(empty)	Data Scientist	(empty)	FTE	0.16	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001607	Julian Ibarra	(empty)	Data Scientist	(empty)	FTE	0.12	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001606	Jillian Myers	(empty)	Data Scientist	(empty)	FTE	0.12	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001605	Jaxtyn Sanchez	(empty)	Data Scientist	(empty)	FTE	0.16	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001604	Jaxon Caldwell	(empty)	Data Scientist	(empty)	FTE	0.12	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001603	Izaiah Wiley	(empty)	Data Scientist	(empty)	FTE	0.16	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001602	Isabel Shields	(empty)	Data Scientist	(empty)	FTE	0.12	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001601	Halo Perkins	(empty)	Data Scientist	(empty)	FTE	0.12	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001598	Devon Lamb	(empty)	Data Scientist	(empty)	FTE	0.17	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001599	Evelynn Eaton	(empty)	Data Scientist	(empty)	FTE	0.12	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001600	Haisley Bryan	(empty)	Data Scientist	(empty)	FTE	0.17	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001597	Casen Reeves	(empty)	Data Scientist	(empty)	FTE	0.12	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001596	Aron Guevara	(empty)	Data Scientist	(empty)	FTE	0.12	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001595	Aria Mitchell	(empty)	Data Scientist	(empty)	FTE	0.17	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001594	Amaya Sims	(empty)	Data Scientist	(empty)	FTE	0.12	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001592	Alexia Wyatt	(empty)	Data Scientist	(empty)	FTE	0.17	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001593	Amaia Hull	(empty)	Data Scientist	(empty)	FTE	0.17	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001591	Adam McCarty	(empty)	Data Scientist	(empty)	FTE	0.17	2024-05-01	2024-05-31	Approved	Migrate resource plans	$0.00	RPLN0001101	Task
RA0001590	Alene Rabeck	Analysts	(empty)	(empty)	Person days	2	2024-01-03	2024-01-09	Approved	Migrate resource plans	$0.00	RPLN0001098	Task
RA0001589	Troy Mccoy (Team Member)	(empty)	(empty)	(empty)	FTE	2.9	2024-02-12	2024-02-29	Approved	Migrate resource plans	$0.00	RPLN0001094	Task

1 to 35 of 35

Operational resource plans to operational resource assignments

Operational resource plans also follow the same logic to migrate operational resource plans to operational resource assignments.

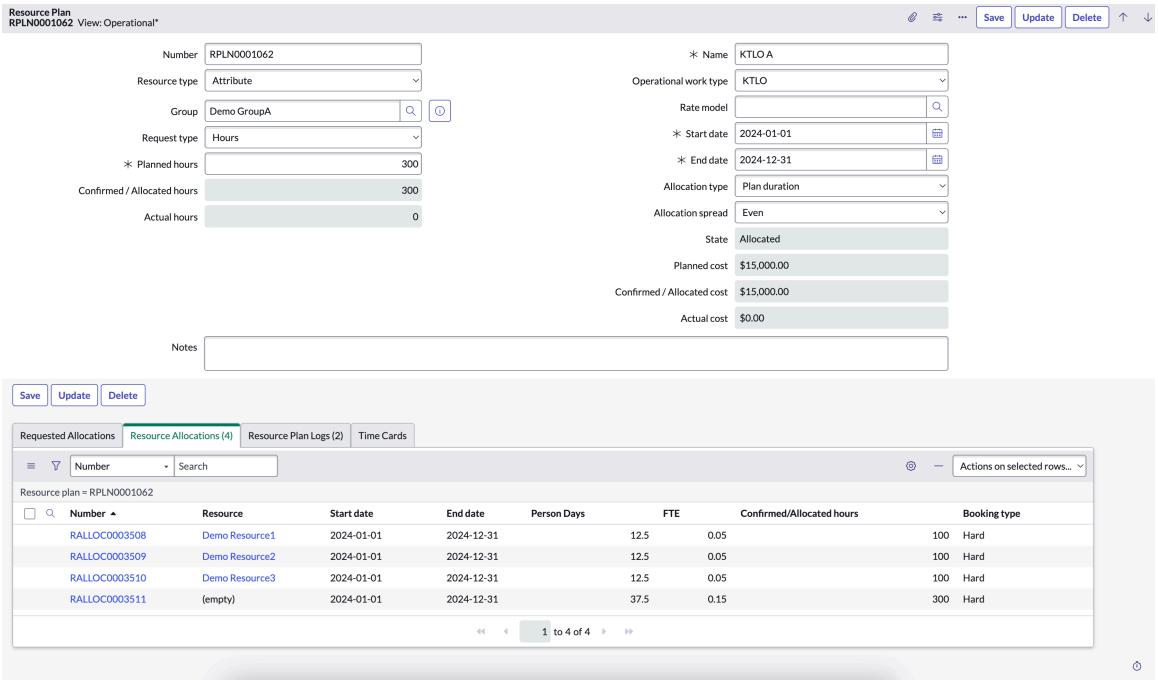
Important:
Operational resource plans in Allocated and Completed states are only migrated as Operational resource assignments.

After migration, the Request type of operational resource plans is changed to Hours.

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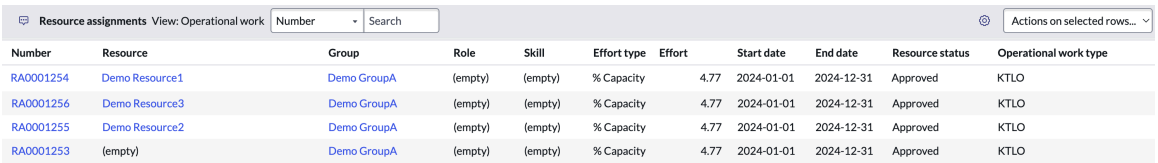
Example: Migration of Operational resource plans to Operational resource assignments

Operational resource plan in Allocated state created for Demo GroupA.



After migration, we will have the following Operational resource assignments for every member of the group.

Note:
The parent-child mapping is retained and you may see an additional resource assignment with empty resource.



Migration of cost plans to attribute-based cost plans

When resource plans of a project or demand are migrated to resource assignments, the corresponding financial cost plans based on the resource plans will be migrated to new attribute-based labor costs. Migrate resource plans related link trigger migrates the cost plans along with resource plans migration.

Every resource plan has an associated a cost plan with Labor capex as the cost type. While migrating, the planning attributes of the resource plans are analyzed to create attribute-based cost plans for the unique combination of the three planning attributes enabled for financials (Employee type, Expense Type, and Role). After migration, there will be no one-to-one association between resource assignments and attribute-based cost plans.

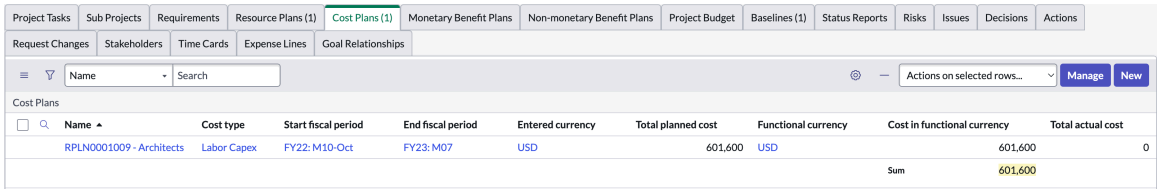
Note:
If a resource plan is not associated with either Employee Type or Role, the migrated cost plans costs are consolidated into a single cost plan.

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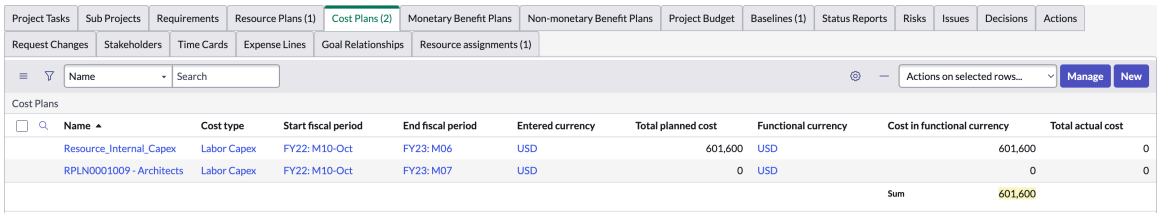
The planned costs are moved to the new attribute-based cost plans while the actual costs remain on the existing cost plan records. The rate model values associated with project or a demand are considered to generate attribute-based labor costs.

Example: Migration of cost plans to attribute-based cost plans

Cost plans associated to a resource plan.



Attribute-based cost plan **Resource_Internal_Capex** is created after migration.



Migrate resource plans and cost plans for projects and demands

Migrate resource plans and cost plans of your projects or demands to resource assignments and attribute-bases cost plans and work on the resource allocations and project financials using Project Workspace.

Before you begin

- Learn more about Migration of resource plans, operational resource plans, and cost plans.
- Ensure the project or demand have resource plans and cost plans.
- Role required: resource_user

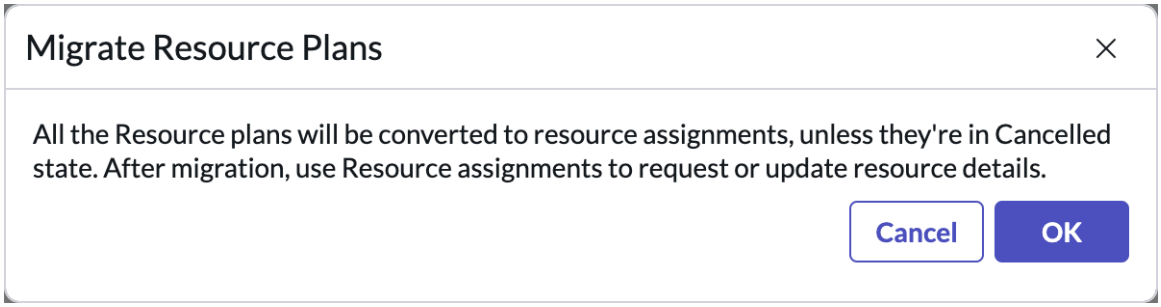
Procedure

1. Use one of the following options to open a project or a demand.
   - To open a project, navigate to **All** > **Project** > **Projects** > **All** and open a project.
   - Too open a demand, navigate to **All** > **Demand** > **Demands** > **All** and open a demand.
2. Select the **Migrate resource plans** related link.

   Note:
   This selection triggers the migration of resource plans and cost plans simultaneously.

3. In the Migrate Resource Plans confirmation window, select **OK**.

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Tip:
You can Activate a scheduled job to migrate resource plans and cost plans.

Result
Resource plans are migrated to resource assignments, cost plans are migrated to attribute-based cost plans. Refresh the project page to view the resource assignments in Resource assignments related list.

What to do next
Create resource assignments to manage resource efforts.

Enable attribute-based resource assignments

Enable the property to work on attribute-based resource assignments to request efforts for your planning items.

Before you begin
- If a project, demand, or a task has at least one attribute-based resource plan, Resource plans related list is hidden.
- If a project, demand, or a task has at least one resource plan without any attribute-based resource assignments, Resource plans related list is visible.
- If a project, demand, or a task has no resource plans and the *sn_pw.enable_resource_planning* property is enabled, Resource assignments related list is available, else, Resource plans related list will be available.
- If a project, demand, or a task has at least one attribute-based resource assignment, **New** and **Manage** options are hidden for Resource plans.
- If a project, demand, or a task has at least one resource plan without any attribute-based resource assignments, **New** and **Manage** options are available for Resource plans.
- If a project, demand, or a task has no resource plans and the *sn_pw.enable_resource_planning* property is enabled, **New** and **Manage** options are hidden for Resource plans, else, they will be available.

Role required: admin

Procedure
1. Navigate to **All** > **System Properties** > **All**.
2. Filter the name field to locate and open **sn_pw.enable_resource_planning**.
3. Change the scope of the instance to **Project Workspace**.
4. Clear the Value field and enter **true**.
5. Select **Update**.

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Create resource assignments

Create resource assignments to request a portion of team or resource capacity for project or demand.

Before you begin

- Migrate resource plans and cost plans for projects and demands
- Set the resource planning property to true to create work with only resource assignments. For more information, see Enable attribute-based resource assignments.
- Role required: resource_user, resource_manager, it_project_manager, demand_manager, admin

Procedure

1. Use one of the following options to open a project or a demand.
   - To open a project, navigate to **All** > **Project** > **Projects** > **All** and open a project.
   - To open a demand, navigate to **All** > **Demand** > **Demands** > **All** and open a demand.
2. On the **Resource assignments** related list, select **New**.
3. On the Resource assignment form, fill the fields.
   For a description of the field names, see Resource assignment form.
4. Select **Submit**.

Tip:
You can edit the child resource assignments from the list view.

Migrate operational resource plans

Migrate the required Operational resource plans to attribute-based Operational resource assignments.

Before you begin

Role required: resource_manager, it_project_manager, demand_manager, admin

Procedure

1. Navigate to **All** > **Resource** > **Resource Plans** > **All Operational Plans**.
2. Select the list of operational resource plans to migrate.
3. Select **Migrate resource plans** from the **Actions on selected rows...** list.
   Operational resource plans are migrated to Operational resource assignments. You can view the list of Operational resource assignments at **All** > **Resource** > **Resource Assignment** > **Operational Resource Assignments**.

Tip:
You can Activate a scheduled job to migrate resource plans and cost plans.

Create operational resource assignments

Create operational resource assignments to allocate a portion of team or resource capacity for operational work such as administration work, meetings, trainings, and so on.

Before you begin

Role required: resource_user, resource_manager, it_project_manager, demand_manager, admin

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Procedure

1. Navigate to **All** > **Resource Assignment** > **Create Operational Resource Assignments**.
2. On the Resource Assignment form, fill in the fields.
   For a description of the field names, see Resource assignment form.
3. Select **Submit**.

Result

Operational resource assignment is created. You can navigate to **All** > **Resource Assignment** > **Operational Resource Assignments** view the list of operational resource assignments.

Activate a scheduled job to migrate resource plans and cost plans

Activate the Migrate Resource Plans scheduled job to migrate resource plans, operational resource plans, and cost plans of your projects and demands to resource assignments and attribute-based cost plans.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Filter the name field to locate and open **Migrate Resource Plans** scheduled job.
3. Select **Active** option to activate and schedule the job.
4. Edit the fields on the Scheduled Script Execution form to customize the job and meet your requirements.
   For more information about the field description and scripts, see Automatically run a script of your choosing.
5. Select **Execute Now** to execute the scheduled job or select **Update** to save your changes.
   Alternatively, you can migrate resource plans and migrate operational resource plans for required projects and demands.

Create requested allocations for a resource plan

Requested Allocations are automatically created when a resource plan is submitted and is in Planning state. If required, resource requesters can create new requested allocations for a resource plan in Planning or Rejected state. Resource managers can create requested allocations for the plans in Requested state.

Before you begin

Role required: resource_user

About this task

A requested allocation doesn't have an allocation for a named resource. It only details the start date, end date, and the planned hours.

To specify the breakup of resource requirements for monthly or weekly Allocations types, you can modify the requested allocations. For example, if you've requested 100 hours of a resource from January to February, but you want 20 hours in January and 80 hours in February. You can specify these details on the Requested Allocations form.

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Procedure

1. Navigate to **All** > **Resource** > **Resource Plans** > **Planning** or **Rejected**.
2. Open a resource plan.
3. In the **Requested Allocations** related list, select **New**.
4. On the Requested Allocation form, fill in the fields.
   For a description of the field values, see Requested Allocation form.
5. To save the record and return to the resource plan, select **Submit**.

Example:

If a resource is requested from September 1 to Nov 30 for 360 hours, requested allocation records are created as follows:

Case 1: Plan duration allocation type

For a plan duration allocation type, the following requested allocation records would be created:

Start date	End date	Planned hours
Sep 01 (Resource plan start date)	Nov 30 (Resource plan end date)	360

Case 2: Monthly allocation type

For a monthly allocation type, hours are proportionally distributed based on working days as follows:

- Total working days for the planned duration = 65 days
- Hours to allocate per working day = `360 / 65` = 5 hours

The following requested allocation records would be created:

Start date	End date	No. of working days	Planned hours
Sep 01	Sep 30	22	22 * 5 = 110
Oct 01	Oct 31	21	21 * 5 = 105
Nov 01	Nov 30	22	22 * 5 = 110

For a weekly allocation, requested allocation records created similar to monthly. Three allocation records, one for each month are created.

Resource allocation

After resource requesters create a resource plan, resource managers can confirm the resources to move the plan to the Confirmed state. Resource managers can then allocate resources to the plan and move it to the Allocated state.

Based on calendar and schedule information, resource managers view resource availability and select the resources under their management that can be confirmed and allocated to specific tasks.

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Soft and hard allocations

When a resource plan moves to the Confirmed state, resource allocations corresponding to requested allocations are created automatically. The **Booking type** for these allocations is **Soft**. Soft allocations are like temporary allocations for the requested users and do not create any calendar events.

When the plan is moved to the Allocated state, the **Booking type** changes from **Soft** to **Hard**. For a hard booking, the resource is assigned to the plan and is not available for other plans during the allocated times. The booked time also appears on the user calendar. If the requested resource cannot be allocated for the entire allocation duration, the allocation record booking type remains as soft.

Any errors or warnings during allocations are logged in the Resource Plan Logs related list on the Resource Plan form. You can review these logs to take correct actions for further resource allocation.

Note:
The resource property *com.snc.resource_management.allocation_interval_minutes* enables the creation of soft and hard allocations with a decimal value.

Calculation of hours for soft allocations

Case 1: Proportional distribution

For example, the requested allocation for a group with two resources when the **Members preference** value is set to **All members** or **Specific members** is as follows:

Start date	End date	Planned hours
October 03	October 07	40

The planned hours on the Resource Plan form are proportionally distributed among all the requested allocations based on number of working days for each requested allocation record.

Resource	Resource time-off	Available capacity (hours)	Soft Allocation hours
Resource 1	2 days	3 * 8 = 24	24 * 0.625 = 15
Resource 2		5 * 8 = 40	40 * 0.625 = 25

The following calculations are used:

- `Total available capacity = Available capacity User 1 + Available capacity User 2 = 24 + 40 = 64 hours`
- `Hours to allocate per hour of available capacity = Planned hours/total available capacity = 40/64 = 0.625 hours`

Note:
Multiple soft allocations could be created for one requested allocation for group resource plans.

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Case 2: Most available resource requested first

For example, the requested allocation for a group with three resources when the **Members preference** value is set to **Any member** is as follows:

Start date	End date	Planned hours
October03	October 07	40

The system finds the most available resources in the specified time frame and creates soft allocations for these resources.

Resource	Available hours	Soft Allocation hours
Resource 1	24	10
Resource 2	30	30
Resource 3	20	

Resource 2 is the most available resource. The system creates soft allocations for resource 2 first until it consumes all available hours from resource 2. The system then moves to the next most available resource, and so on. Once available hours for all resources are consumed, and the planned hours are still left over after allocating across all members (from most available to least available), the remaining hours are equally distributed among all resources.

Calculation of hours for hard allocations

Case 1: Even spread

Selecting **Even** as hard allocation spread type creates resource events for the resource by splitting the hours evenly across all working days.

The Smart Even Load allocation spread takes the availability of resources into account while allocating and only applies hours evenly where possible. If a resource is over-allocated for a day, it bypasses that day and resumes allocations to succeeding days until the resource plan is fulfilled.

For example, for a resource requested for 20 hours in a week, the even spread hard allocation is as follows:

Day of the week	Monday	Tuesday	Wednesday	Thursday	Friday
Available hours	6	6	6	6	Time-off
Allocated hours	5	5	5	5	0

Case 2: Front load

Selecting **Front load** as the hard allocation spread type fills up all available resource slots from the start date of the allocation. Once the resource is fully allocated between start and end dates, the remaining hours are filled from the start date up to 24 hours.

For example, for a resource requested for 20 hours in a week, the front load spread hard allocation is as follows:

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Day of the week	Monday	Tuesday	Wednesday	Thursday	Friday
Available hours	6	6	6	6	Time-off
Allocated hours	6	6	6	2	0

Event creation during hard allocation

You can control the minimum unit for an event by modifying the Calendar Event Duration (minutes) (*com.snc.resource_management.allocation_interval_minutes property*). The default is 60 minutes.

Resource allocations use this property to create allocations with a decimal value.#Use the following table to ensure you set the property value correctly.

Scheduled hours of the user	Calendar Event Duration value
0.5	30
0.25/0.5/0.75	15
0.2/0.4/0.6/0.8	12
0.1, 0.2, and so on	6

Example: 4 hours for 1 week, with an allocation interval of 60 minutes

Creates a 60-minute block from Monday through Thursday.

Monday	Tuesday	Wednesday	Thursday	Friday
60 mins	60 mins	60 mins	60 mins	

Example: 4 hours for 1 week, with an allocation interval of 30 minutes

If the value of this property is set to#30#minutes, and#1#hour needs to be allocated to the user, the allocation is divided into the two 30-minute blocks when the user is available.#This setting creates a 60-minute block from Monday through Wednesday and 30-minutes blocks for Thursday and Friday.

Monday	Tuesday	Wednesday	Thursday	Friday
30 mins+30 mins	30 mins+30 mins	30 mins+30 mins	30 mins	30 mins

Note:
If the scheduled#hours are not divisible by#the Calendar Event Duration property, then there will be#a #loss#of few hours for each day.#For example, the per day scheduled#hours #per day are#8.5#and the property value is set to 60. Then, the#maximum#allocated#hours #for#each#day#will#be#8,#resulting#in#a#loss #of #0.5#hours #per #day.

Time-off handling

Resource events from a resource plan are not created for the days where the resource has marked time-off or engaged in other events (such as training and meetings). An

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administrator can manage the resource capacity and allocation with the property, *com.snc.resource_management.exclude_events_from_schedule*, to specify:

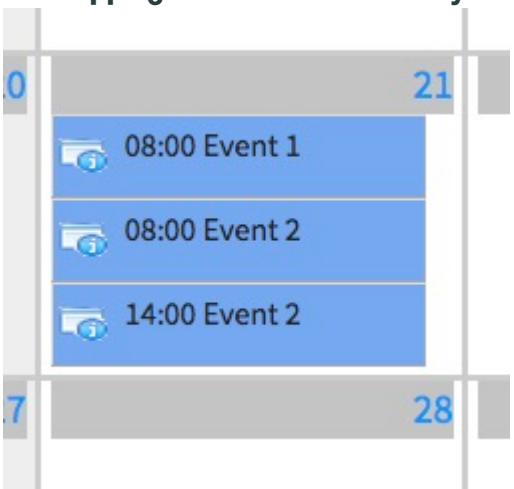
- Which events must be excluded for capacity calculations. For example, if a resource has time-off between Monday and Wednesday, the weekly capacity for the resource is calculated as 16 hours (as opposed to 40 hours).
- When the system must not create allocations. For example, if a resource is in training on Friday, the resource is not allocated for a task on Friday.

Over-allocation

Over-allocated resources are allowed. Over-allocating resources creates overlapping events in the user calendar within the user's scheduled hours. However, a maximum of 24 total hours can be allocated in any given day. Overlapping events appear overlapped in the calendar in the weekly view. In the monthly view, overlapping events appear above or below another event.

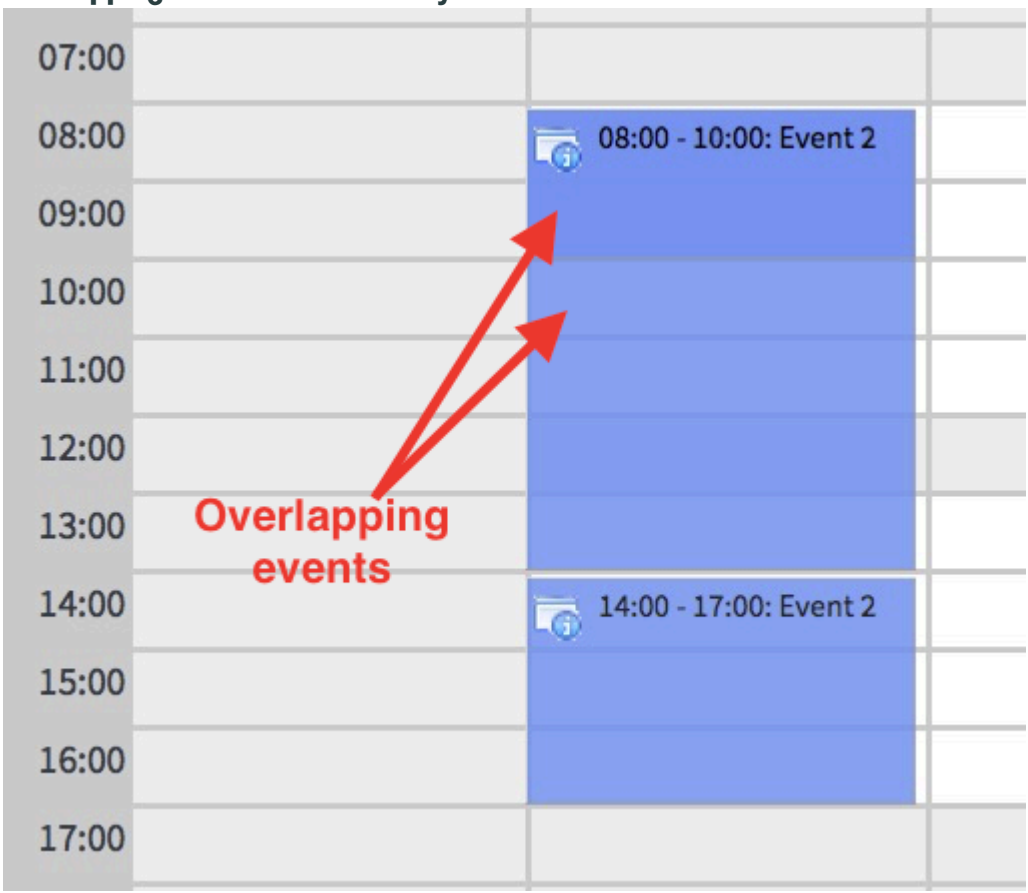
For example, a user has a schedule that specifies the daily work day from 08:00 to 17:00. Event 1 is in the user's calendar from 08:00 to 14:00. If an additional five hours are added for the same day for Event 2, an event is created for the three hours of free time (14:00 to 17:00). An overlapping event is also created for the remaining two hours, starting at the beginning of the day (08:00 to 10:00).

Overlapping event from the monthly view



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Overlapping event from the weekly view



Create a resource role

Define project-specific roles for team members based on their skills and competencies.

Before you begin

Role required: resource_manager

Procedure

1. Navigate to **All** > **Resource** > **Resources** > **Resource Roles**.
2. Select **New**.
3. On the Resource Role form, fill the fields.
   For a description of the field names, see Resource Role form.
4. Select **Submit**.

User resources and group resources

When allocating resources, a resource manager might need to work with an administrator to add users to a group with pps_resource role.

Resource Manager view

The Resource Manager view in **Resource** > **Resources** > **Users** lists only the users who have the pps_resource role. In addition to some of the fields displayed in the User Administration > Users form, the Resource Manager View > Users form also displays the following fields, which are editable only by a user with resource_manager role:

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- **Location**
- **Schedule**
- **Timesheet Policy**
- **Average Daily FTE Hours/Hours Per Person Day**

Note:
Use the Update Resource Capacity related link to specify a date range. User capacity is populated in all aggregate tables based on the schedule of the user.

The Resource Manager view in **Resource** > **Resources** > **Groups** lists only the groups with the pps_resource role. When a resource manager creates a new group from this view, the pps_resource role is added by default to the group record. Although resource managers have write access to several fields, the only fields that they should edit are **Average Daily FTE Hours/ Hours Per Person Day** and **Hourly rate**.

Update the resource capacity

From the Resource Manager view, update the capacity of a user for a specific duration. Based on the schedule of the user and the specified duration, the capacity of the user is accordingly populated in all resource aggregate tables.

Before you begin

Role required: resource_manager

About this task

Use the **Update resource capacity** related link in the following scenarios:

- If a user is newly added and you want to update the capacity for the user.
- If the schedule of an existing user is changed and you want to update the capacity of the user.

The scheduled job that is used for this action is Update resource capacity.

Capacity is generated for only the date range between employment start date and employment end date specified in the employee profile in the HR application. This information is available when the Employee Profile plugin is installed. If the start and end date are unavailable for an employee, manually specify these dates.

Also, if an employee is available after the year has begun, then the capacity is generated from the current year's beginning, to ensure that missing capacity is accounted for. For example, if the employee's capacity is available from March 1, 2022 to June 1, 2022, then the updated capacity is generated from January 1, 2022 to June 1, 2022.

Capacity and availability for terminated resources is automatically updated to 0 when you run the Resource Termination Handler job when the termination date is after the date on which the job is run. If resources are booked for a time period beyond the user's termination dates, those bookings are also updated to 0 in the resource plan.

Use the **Update resource capacity** related link in the following scenarios:

- If a user is newly added and you want to update the capacity for the user.
- If the schedule of an existing user is changed and you want to update the capacity of the user.

The scheduled job that is used for this action is Update resource capacity.

Before updating capacity for a new hire: Ensure the following are configured for the user before running the capacity update:

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1. Employment dates: Set the employment start date (and optionally end date) in the user's employee profile. Capacity is only generated within these dates. If the Employee Profile plugin is not installed, manually specify these dates on the user record.
2. Schedule: Assign a work schedule to the user. The capacity calculation is based on the user's schedule (for example, a standard 8-hour workday schedule). Without a schedule, capacity values may be incorrect.
3. PPS resource role: Ensure the user has the `pps_resource` role so they appear in resource plans and capacity views.

Capacity is generated for only the date range between employment start date and employment end date specified in the employee profile. If an employee is available after the year has begun, capacity is generated from the current year's beginning to ensure missing capacity is accounted for.

Capacity and availability for terminated resources is automatically updated to 0 when you run the Resource Termination Handler job.

Procedure

1. Navigate to **All** > **Resource Management** > **Resources** > **Users**.
2. Select a **User ID**.
3. Select the **Update Resource Capacity** related link.
4. In the window, provide a start date and end date.

   Note:
   You can't select a start date that is before the employment start date or an end date that is after the employment end date when the Employee Profile plugin is installed.

5. Select **OK**.

Update the resource aggregates

From the Resource Manager view, you can update the resource aggregates for a specific time frame.

Before you begin
Role required: admin

About this task
You can use the **Update Resource Aggregates** related link in the following scenarios:

- If you notice a discrepancy in aggregates and want to generate correct data.
- If you want to synchronize aggregates with the Resource Allocation Daily [resource_allocation_daily] entries for a specific time frame.

Procedure

1. Navigate to **All** > **Resource Management** > **Resources** > **Users**.
2. Select a **User ID**.
3. Select the **Update Resource Aggregates** related link.
4. In the window, provide a start date and end date.
5. Select **OK**.

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Create allocations

Resource managers can create allocations using the Resource Allocations related list.

Before you begin
Role required: resource_manager

Procedure

1. Navigate to **All** > **Resource** > **Resource Plans** > **Requested**.
2. Open a resource plan.
3. In the **Resource Allocations** related list, select **New**.
4. On the Resource Allocation form, fill the fields.
   For a description of the field values, see Resource Allocation form.
5. Select **Submit** to save the record and return to the resource plan.

What to do next
In the resource plan form, select **Confirm** or **Confirm and Allocate** to move the resource to the **Confirmed** or **Allocated** state.

Reject a resource plan from the Resource Plan form

Resource managers can reject plans from the Resource Plan form or from the Resource Workbench.

Before you begin
Role required: resource_manager

About this task
You can also perform this task from the allocation workbench.

Procedure

1. Navigate to **All** > **Resource** > **Resource Plans** > **Requested**.
2. Open the plan to reject.
3. **Optional:** Add a description of the reason for the rejections in the **Notes** field.
4. Select **Reject**.

Capacity planning overview

Capacity Planning page provides resource managers with a comprehensive view of capacity, allocations, and utilization of resources. As a resource manager, you can use it to review resource capacity and existing allocations and then confirm resources to a demand or project.

Important:
Capacity planning is being deprecated starting Xanadu release. It will be hidden and no longer available for installation but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Resource Managers are encouraged to use the Planning user capacity in Strategic Planning Workspace to view and manage the capacity, allocations, and utilization of resources.

The capacity planning page is based on Service Portal which enables you to configure, customize, and extend it per your requirements and organizational workflow. See Service Portal for more information.

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The Capacity Planning page is divided into following sections:

Resource Plans

The left pane displays the requested resource plans as cards based on the filter conditions. You can select more than one resource plan to review the capacity of the associated resources.

Resource Forecast

The section enables you to review the resource forecast of the selected resource plans in the following tabs:

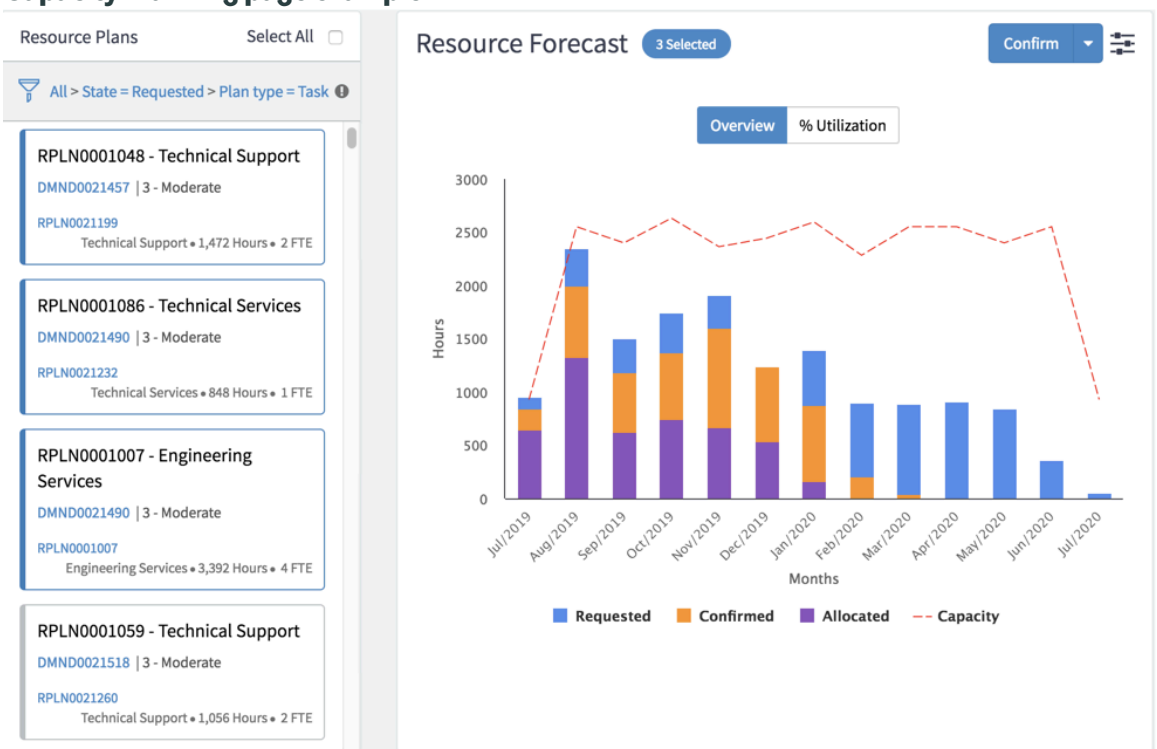
- **Overview** tab: Displays the following items in the stacked bar chart.
  - the total capacity trend for the resources
  - requested hours (for the selected plan only)
  - confirmed hours (across all projects)
  - the allocated hours (across all projects)

  Pointing to any of the sections on the bar chart shows its details.

- **% Utilization** tab: Displays the heat map for the percentage of utilization of resources including both hard and soft allocations and requested hours for the selected resource plans. The heat map helps resource managers understand how committed utilization would look if resources are allocated to resource plans in the requested state. If utilization is greater than 100%, resources are over allocated. The resource manager must ensure that percentage of utilization of all resources is within 100%.

Note:
If a resource plan is already allocated, you cannot select it to see its details in the resource forecast section.

Capacity Planning page example



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Review capacity of the resources

Use the capacity planning page to review the capacity and utilization trends of the resources associated with the requested resource plans.

About this task

Important:
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Resource Managers are encouraged to use the Planning user capacity in Strategic Planning Workspace to view and manage the capacity, allocations, and utilization of resources.

Before you begin

Role required: resource_manager

Procedure

1. Navigate to **All** > **Resource** > **Resource Workbench** > **Capacity Planning**.
2. To filter the list of displayed resource plans, select the filter icon () in the **Resource Plans** section.
   The filtered resource plans are displayed as cards.
3. To view its resource forecast, select a resource plan in the **Resource Plans** section.
   You can select more than one resource plan. To select all the plans in the list, select the **Select All** check box.

   Note:
   When you select multiple plans, the requested hours are added for the selected plans in the bar graph. You can continue adding plans until the team capacity (shown as red dotted line) is shown fully utilized.

4. In the **Resource Forecast** section, review the resource capacity and utilization for the selected resource plans.
   The section shows the information in the following tabs.
   - **Overview** tab: Displays the following information in a stacked bar chart. Point to any of the sections on the bar chart to show its details.
     - **Requested**: Number of hours that the resource has been requested for the selected resource plans only.
     - **Confirmed**: Number of hours confirmed. The value considers all resource plans and the hours across all projects and demands for the group or user requested for selected resource plans.
     - **Allocated**: Number of hours that the resource is already committed. The value considers all resource plans and the hours on the user calendar. For example, hours allocated for operational work or meetings across all projects and demands for group or user requested for selected resource plans.

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- **Capacity**: Total capacity trend for the resources, which is derived from the user or group schedule. The group capacity is rolled up from the schedules of all the members.

  Note:
  Capacity isn't derived from FTE, but from schedules. Both FTE and schedules must be in synchronization with each other.

- **% Utilization** tab: Displays the heat map for the percentage of utilization of resources including both hard and soft allocations and requested hours for the selected resource plans.

5. To show or hide the respective bar or line in the graph, select an item in the legend below the graph.
6. To open and modify the display settings for the graph and heat map, select the Settings icon  in the **Resource Forecast** section.
7. In the **Resource Forecast** section, use the following options to take an action on a resource plan.

Option	Description
Confirm	Confirms the resources to the selected plan. The selected resource plan moves to the Confirmed state. Soft allocations are created when the resource plan moves to the Confirmed state.
Confirm and Allocate	Allocates the resources to the selected plan directly without first confirming them. The selected resource plan moves to the Allocated state. Hard allocations are created when the resource plan moves to the Allocated state.
Reject	Rejects the selected plan.

Note:
You can select more than one resource plan to Confirm, Confirm and Allocate, or Reject.

Allocation workbench

Use the allocation workbench to allocate your resources effectively to the requesting investments by evaluating resource capacity and availability.

Important:
Allocation workbench is being deprecated starting Xanadu release. It will be hidden and no longer available for installation but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Resource Managers are encouraged to use the Resource Management Workspace to allocate, approve, and manage resource assignments. Resource Management Workspace is a dedicated workspace view for Resource Managers where you get the insights about unassigned tasks, heatmap view of resource bandwidth, custom view to handle priority resource assignment requests, and so on.

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Allocation boards

Allocation boards group resources based on filters so that you can view and manage specific resources for investments. For example, you can create an allocation board by filtering on a specific program to group your resources requested or allocated to projects and demands of the program.

The Allocation Boards page shows all your allocation boards. You can create a personalized allocation board through a filter definition. Selecting a board name opens the allocation workbench with a list of projects, demands, and operational work types that match the allocation board filter type.

When you select a resource plan in the resource grid section, the availability details of the associated resources are displayed in the resource finder section. For example, if you select a group resource plan, the availability details of the group and its members are displayed in the resource finder section. You can expand and view other columns by selecting the **Detailed View** icon, and selecting columns from the **Configurations** list. When you change the selection, the results are automatically updated.

Watch this video to learn about the purpose and usage of the Resource Allocation Workbench.
Resource Allocation Workbench and its usage

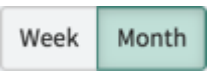
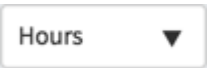
Use various options on the workbench header to do the following actions.

Allocation workbench options

Option	Description
Date range selector 	Shows resource plans for the selected time range. For a new allocation board, the default period is set as the current date to six months. If you change these dates, the new range is saved as the board default for future board use. From the Xanadu release onwards, the following enhancements are available on the board: • Resource grid view starts from the month or week as per the value that you set in the **From** field. Previous and future months are visible with horizontal scroll on the grid view. However, If there are no resource plans starting in the selected month or week, the resource grid view starts with the earliest date among all the resource plans. • When switching between resource plans, the timeline on the grid view does not change so that your focus remains on the selected date range. However, you can easily set the view to the plan's start date by selecting **Go to Start Date** from the **Actions** menu (⋮).

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Allocation workbench options (continued)

Option	Description
Resource filter 	Enable the **Create and manage operational resource plans from the resource allocation workbench** property by navigating to **Project Administration > Properties - Resource** to search for operational resource plans from the allocation workbench. Filters projects and demands in the resource grid by group, role, user, or task for the selected period. Filter operational resource plans in the resource grid by the operational work type.
State filter 	Filters resource plans in the resource grid using the (P) Planning, (R) Requested, (C) Confirmed, (A) Allocated, and (E) Extension Requested options. **Note:** The (P) Planning and (C) Confirmed filters are not applicable for operational resource plans.
Week or Month view 	Shows allocations in weekly or monthly format in both the resource grid and resource finder sections.
Hours, FTE, or Person days view 	Shows allocations in hours, FTE, or person days format in both the resource grid and resource finder sections.
Resource Finder 	Displays the resource finder section at the bottom of the workbench. Use the resource finder section to search resources and create a resource plan for them.
Configuration 	Shows or hides the selected columns on the grid. Selecting the **Planned Cost**, **Actual Cost**, **Conf/Alloc Cost**, or **Resource Type** columns pins them on the grid before the **Details** column group. Other columns are added in the **Details** column group in the collapsed state. To view the collapsed columns, click

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Allocation workbench options (continued)

Option	Description
	the expand icon ( ) on the **Details** column group.
Legend 	Specifies the state of the resource plan using the **Partial Allocated** legend.

Resource grid

The resource grid lists all investments and the resources requested or allocated to them. In the grid view, you can perform the following tasks:

- Edit the planned, confirmed, and allocated hours inline without opening the record in a form.
- Request changes to submitted resource plans, or request an extension of an allocated resource plan.
- Confirm or allocate resource plans to a project or demand.
- Allocate resources for an operational resource plan.
- Replace one user's allocation with another user
- Shift allocations of a user to a future date
- Move a resource plan and its allocations to a future date
- Complete, delete, or cancel resource plans.
- Group, hide, or show columns.
- Identify the resource plans created with specific members preference by viewing the **Resource plan created with specific members** icon ( ) next to the resource plans.

Note:
The confirm, replace, shift, and move actions can’t be performed for an operational resource plan.

Resource finder

The bottom resource finder section of the allocation workbench is hidden by default. To make it visible, select the resource finder icon ( ) at the top right. In the Resource finder, you can perform the following actions:

- Search for resources and view their availability and utilization. You can search resources by group, role, or user.
- Add or confirm resource plans for the current resources.
- Configure the **Actuals** column using **Detailed View**.
- Filter resources in the **Resource Finder** by available, overallocated, or all resources.
- Identify resources that are created as specific members for a resource plan by viewing the **Member specified in the resource plan** icon ( ) next to the resources.

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- View the Resource Availability and Resource Capacity grids by selecting a capacity or availability column.

  View the user and resource allocation details in a pop-up window by selecting the **User** and **Allocated Hours** columns respectively in the **Resource Availability** grid.

> **Note:**
> The allocated values are displayed in the Hours, FTE, or Person Days fields based on the selection made in the Allocation Workbench.

Create or update an allocation board

Create a personalized allocation board to manage your filtered resources in terms of their capacity, availability, and utilization.

About this task

> **Important:**
> Allocation workbench is being deprecated starting Xanadu release. It will be hidden and no longer available for installation but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.
>
> Resource Managers are encouraged to use the Resource Management Workspace to allocate, approve, and manage resource assignments. Resource Management Workspace is a dedicated workspace view for Resource Managers where you get the insights about unassigned tasks, heatmap view of resource bandwidth, custom view to handle priority resource assignment requests, and so on.

Define filter criteria to create your board. You can modify the details of an existing board or delete an unused board.

Step 1 provides you the navigation to Allocation Workbench. Choose step 2, 3, or 4 to create, update, or delete a board.

An allocation board groups resources based on filter criteria. Opening a board shows the list of resources under that criteria in the allocation workbench.

Before you begin

Role required: resource_manager

Procedure

1. Navigate to **All** > **Resource** > **Resource Workbench** > **Allocation Workbench**.
2. To create a board, do the following.
   a. Select **New** on the Allocation Boards page.
   b. In the **Create new** window, fill the fields.
   For a description of the field values, see Create New form.
   c. Select **Create**.
3. To update the board information, do the following.

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a. Select an existing allocation board to open it.

b. Select the Allocation workbench menu () and select **Edit**.

c. Update the fields and select **Update**.

4. To delete the board, do the following:

a. Select an existing allocation board to open it.

b. Select the Allocation workbench menu () and select **Delete**.

c. Select **Delete** to confirm.

Result

- Allocation board is created and you're navigated to the allocation workbench. The allocation workbench shows the resources based on the filter criteria defined by the allocation board.
- In the Allocation Boards page, the board is added and has a color band based on the applied **Type** filter.

Manage resources by using the allocation workbench

Use the allocation workbench to manage your resources effectively. You can review all resource requests in one place for your team. You can also see the available hours for requested users and efficiently allocate resources.

About this task

Important:
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Resource Managers are encouraged to use the Resource Management Workspace to allocate, approve, and manage resource assignments. Resource Management Workspace is a dedicated workspace view for Resource Managers where you get the insights about unassigned tasks, heatmap view of resource bandwidth, custom view to handle priority resource assignment requests, and so on.

The allocation workbench resource grid provides a detailed breakdown of resource data. You can change the view and filter data.

If you confirm or allocate hours from the **Actions** menu, the per day capacity for a resource is 24 hours.

You can view and manage resource availability and utilization using the resource finder. To enable the resource finder, click the resource finder icon (). If you confirm or allocate hours from the resource finder section, the per day capacity for a resource is based on the resource's schedule.

If a warning is displayed while performing a task from the Allocation Workbench, you can navigate to detailed logs for that action on a new tab by clicking the hyperlink on the message. For example, while requesting extension of a resource plan, if a resource plan can't be extended for all the requested hours, a warning is displayed that specifies that some hours can't be extended.

If the **Do not allow resource plan dates to be outside the Project/Demand dates** property is enabled, the resource plan start and end dates must be within the project or demand dates

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when you create, extend, shift, move, or change the state of a resource plan from requested to confirm or allocate.

Before you begin

Role required: resource_manager

Procedure

1. Navigate to **All** > **Resource** > **Resource Workbench** > **Allocation Workbench**.
2. On the Allocation Boards page, select the allocation board whose resource plans you want to manage.
3. Perform the following tasks in the resource grid.

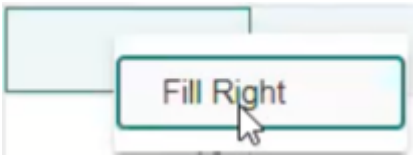
   The available options change depending on the state of the resource plan.

Task	Steps
Create a resource plan for a project or demand	**a.** Click a project or demand in the resource grid. **b.** Click the **New Plan** button located in the top-right corner.
Create a resource plan for a project or demand from selected resources	**a.** Click a project or demand in the resource grid. **b.** In the resource finder section, search for and select the desired available resources. **c.** Click the **Add New Plan** button.
Request a resource plan	**a.** Click a resource plan in the resource grid. **b.** Click the **Actions** icon (⋮), and select **Change State > Request**.
Confirm or allocate a resource plan	**a.** Click a resource plan in the resource grid. **b.** Click the **Actions** icon (⋮), and select **Change State > Confirm** or **Change State > Allocate**.
Extend a resource plan	**a.** Open a resource plan in the resource grid. **b.** Click the **Actions** icon (⋮), and select **Extend Resource Plan**. **c.** Enter the new end date of the resource plan in the **New end date** field. **d.** Select the type of request and click **Ok**.
Allocate extension	Allocate resources for the extended period requested by the project manager. **a.** Click a resource plan in the resource grid. **b.** Click the **Actions** icon (⋮), and select **Allocate Extension**.

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Task	Steps
Confirm or allocate resources for a requested group, role, or user resource plan for the whole period of the resource plan	See the Confirm or allocate resources from the Allocation Workbench topic.
Confirm or allocate resources for a group, role, or user resource plan for a specific period	See the Confirm or allocate resources from the Allocation Workbench topic.
Partially allocate a resource plan for specific periods	This option is available only for a Confirmed resource plan. You can allocate a resource plan for a specific period instead of allocating the resource plan for the full duration. For a group and role resource plan, you can partially allocate a plan at the user level. You can allocate resources in one of the following ways: ○ To allocate a resource for all the periods updated in a row, click the **Actions** icon (⋮) and select the **Allocate** option. ○ To allocate a resource for a specific period: **a.** In the resource grid section, right-click in the **Conf/Alloc** cell for the required period. **b.** Select **Allocate**. The resource plan is partially allocated and the partially allocated icon (○) is displayed in the **State** cell in the resource grid.
Delete a resource plan	**a.** Click a resource plan in the resource grid. **b.** Click the **Actions** icon (⋮), and select **Delete**.
Edit hours in the grid	Use one of the following ways: ○ Enter the value for an individual cell. **a.** Double-click a resource plan or a specific resource row. **b.** Edit the allocated hours of the resource plan or a resource in the grid. **c.** Move the pointer out of the cell to save. ○ Update multiple cells at once: You can copy the existing value from a cell and update the cells to its right. For example, you want to update the planned hours of a resource for all the months of the resource plan.

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Task	Steps
	▪ Right-click on the cell that you want to copy the value from and select **Fill Right**.  ▪ Fill in the details of the number of cells that you want to update and the hours. ▪ Select **Update**. **Note:** The Fill Right option is available only on those columns that are editable. For example, a resource plan is in the Allocated state.
Replace a user with another user for a group, role, or user resource plan.	See the Replace user in a resource plan topic.
Move a resource plan and its allocations to a future date for a group, role, or user resource plan	See the Move a resource plan topic.
Shift allocation of a user to a future date for a group or role resource plan	See the Shift allocations of a user topic.
Request all the resource plans for a project or demand	The **Request All** option is available when at least one of the listed resource plans under the project or demand is in the Planning state. **a.** Click the **Actions** icon (⋮) on a project or demand row in the resource grid. **b.** Select **Request All**.
Request a change to a submitted resource plan	The **Request change** option is available for a resource plan in the Requested or Confirmed state. **a.** Click the **Actions** icon (⋮) on a resource plan row in the resource grid. **b.** Select **Request Change**.
Request extension of an allocated resource plan	See the Request extension of an allocated resource plan topic.
Reduce the duration of an allocated or confirmed resource plan	If there are no actuals posted for future in the resource plan, then all the allocated or confirmed hours of all the resources will be released when you reduce the resource plan. If actuals are posted for future, then the resource plan end date will be updated to

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Task	Steps
	the future date on which actuals are present, and all the allocated or confirmed hours of all the resources from the date on which actuals are present to the original end date will be released. **a.** Click the **Actions** icon (⋮) on a resource plan row in the resource grid. **b.** Select **Reduce Resource Plan**. **c.** Enter the new end date of the resource plan in the **End date** field, and click **Yes**.
Complete a resource plan	After all the associated tasks and projects are complete or canceled, as a resource manager you can mark the resource plan complete and closed. The state of the plan changes to Complete. **a.** Click the **Actions** icon (⋮) on a resource plan row in the resource grid. **b.** Select **Complete**. **c.** In the Confirm dialog box, select the **Completion date** option, and click **Yes**.
Cancel a resource plan	When a resource plan is no longer required, as a resource manager you can cancel it, which also cancels its past and future allocations. **a.** Click the **Actions** icon (⋮) on a resource plan row in the resource grid. **b.** Select **Cancel**.
View the resource allocations at user level	In the resource grid section, expand a resource plan entry. The user level allocations are listed only for group and role resource plans. If an entry doesn't have an associated resource plan, the expand option won't be available. A negative value in a user row indicates that the user is over-allocated for that period. Click the value to see the resource over-allocation daily records of the user to see the specific over-allocated days.
View the details of a project or a demand	**a.** Click the **Actions** icon (⋮) on a project or demand row in the resource grid. **b.** Select **View Project** for a project or select **View demand** for a demand.

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Confirm or allocate resources from the Allocation Workbench

Confirm or allocate resources for a group, role, or user resource plan for the entire period of the resource plan or a specific period of the resource plan from the Allocation Workbench.

About this task

Important:
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Resource Managers are encouraged to use the Resource Management Workspace to allocate, approve, and manage resource assignments. Resource Management Workspace is a dedicated workspace view for Resource Managers where you get the insights about unassigned tasks, heatmap view of resource bandwidth, custom view to handle priority resource assignment requests, and so on.

The allocation period must be within the resource plan duration to confirm or allocate resources for a specific time period.

You can confirm resources only for a requested or confirmed resource plan. The confirm action is not applicable for operational resource plans.

You can allocate resources only for a partially allocated or allocated resource plan.

Before you begin

Role required: resource_manager

Procedure

1. Navigate to **All** > **Resource** > **Resource Workbench** > **Allocation Workbench**.
2. On the Allocation Boards page, select the allocation board whose resource plans you want to manage.
3. Select a group, role, user resource plan in the resource grid.
   The resource finder shows all the resources in that resource plan.
4. In the resource finder section, check the availability of the resources.
5. Select the required resources.
6. Confirm or allocate resources.
   - For a specific period: Select the down arrow () corresponding to **Confirm** or **Allocate**, and select **Confirm for specific period** or **Allocate for specific period**. Select the allocation period and select **Confirm** or **Allocate**.
   - For the whole period: Select **Confirm** or **Allocate**.

   For operational resource plans, allocated hours for a resource are calculated based on the percentage capacity specified in the operational resource plan. If a new member is added to a group, you can allocate the newly added member in an already allocated operational resource plan for the same group.

   Note:
   Users already confirmed or allocated for a time period can't be confirmed or allocated for the same time period again.

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Replace a user in a resource plan

Replace a user with another user for a group, role, or user resource plan to accommodate situations like a user taking leave during a project.

About this task

Important:
Allocation workbench is being deprecated starting Xanadu release. It will be hidden and no longer available for installation but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Resource Managers are encouraged to use the Resource Management Workspace to allocate, approve, and manage resource assignments. Resource Management Workspace is a dedicated workspace view for Resource Managers where you get the insights about unassigned tasks, heatmap view of resource bandwidth, custom view to handle priority resource assignment requests, and so on.

This option is available only for a confirmed or allocated resource plan.

A user can be replaced only if no actuals are present in that period for the existing user.

Before you begin

Role required: resource_manager

Procedure

1. Navigate to **All** > **Resource** > **Resource Workbench** > **Allocation Workbench**.
2. On the Allocation Boards page, select the allocation board whose resource plans you want to manage.
3. Select a group, role, or user resource plan in the resource grid.
4. Select the **Actions** icon (⋮) on the user that you want to replace, and select **Replace User**.
5. In the **User** field of the Replace Users window in the **To** section, select the new user to whom allocations must be transferred.
6. Select the replace period.

   By default, the replace period starts from the current allocation week or month.

   The replace end period can’t be later than the resource allocation's end date, and the replace start period can’t be before the resource's allocation start period.

7. **Optional:** Select the **Delete the original allocation in case of complete transfer** check box to delete the original user allocations if a complete transfer happens.

   (Optional) If the new user is available for all the time periods and all the hours in the replace period, a complete transfer happens.

8. Select **Allocate** or **Confirm**.

Result

When a user is replaced in a user resource plan, a new resource plan is created for the new user.

When the new user isn’t available for complete allocation, the maximum available allocations are transferred to the new user, and the remaining allocations remain with the existing user.

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Move a resource plan

Move a resource plan and its allocations to a future date for a group, role, or user resource plan.

About this task

Important:
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Resource Managers are encouraged to use the Resource Management Workspace to allocate, approve, and manage resource assignments. Resource Management Workspace is a dedicated workspace view for Resource Managers where you get the insights about unassigned tasks, heatmap view of resource bandwidth, custom view to handle priority resource assignment requests, and so on.

This option is available only for a planning, requested, confirmed, or allocated resource plan.

Before you begin

Role required: resource_manager

Procedure

1. Navigate to **All** > **Resource** > **Resource Workbench** > **Allocation Workbench**.
2. On the Allocation Boards page, select the allocation board whose resource plans you want to manage.
3. Select a group, role, user resource plan in the resource grid.
4. Select the **Actions** icon (⋮) on the resource plan that you want to move, and select **Move Resource Plan**.
5. In the **To** field of the Move Resource Plan window, select the time period to which the allocations must be moved.
6. Select **Update**.

   The dates of the moved resource plan and its allocations are updated, and the state of the plan and booked resources are retained.

Shift allocations of a user

Shift allocation of a user to a future date for a group or role resource plan to accommodate situations where planned work for a specific user of a group or role resource plan must be shifted to a future time period.

About this task

Important:
Allocation workbench is being deprecated starting Xanadu release. It will be hidden and no longer available for installation but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Resource Managers are encouraged to use the Resource Management Workspace to allocate, approve, and manage resource assignments. Resource Management Workspace is a dedicated workspace view for Resource Managers where you get the insights about unassigned tasks, heatmap view of resource bandwidth, custom view to handle priority resource assignment requests, and so on.

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Before you begin
Role required: resource_manager

Procedure

1. Navigate to **All** > **Resource** > **Resource Workbench** > **Allocation Workbench**.
2. On the Allocation Boards page, select the allocation board whose resource plans you want to manage.
3. Select a group or role resource plan in the resource grid.
4. Select the **Actions** icon (⋮) on the user that you want to shift allocations for, and select **Shift Allocations**.
5. In the **From** field in the Shift allocations window, select the time period from which you want to shift the allocations.

   Note:
   The from period can't be before the current allocation period.

6. In the **To** field, select the time period to which you want to shift the allocations.

   If the dates of the shifted resource allocations are beyond the resource plan end date, the resource plan is extended.

7. Select **Update**.

   The allocation cap per day is 24 hours.

   If a user is already booked for the shifted period, then the user is over-allocated for the shifted period.

   Note:
   If actuals are posted for all the periods of resource allocation, then the **Shift Allocations** option is disabled in the **Actions** menu.

Manage operational resource plans from the allocation workbench

Create and manage operational resource plans effectively from one place using the Resource Allocation Workbench without having to navigate individually to the operational resource plan's form or list.

About this task

Important:
Allocation workbench is being deprecated starting Xanadu release. It will be hidden and no longer available for installation but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Resource Managers are encouraged to use the Resource Management Workspace to allocate, approve, and manage resource assignments. Resource Management Workspace is a dedicated workspace view for Resource Managers where you get the insights about unassigned tasks, heatmap view of resource bandwidth, custom view to handle priority resource assignment requests, and so on.

Before you begin
Enable the **Create and manage operational resource plans from the resource allocation workbench** property by navigating to **All** > **Project Administration** > **Properties - Resource** to

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create operational resource plans from the Allocation Workbench. For more information, see Resource Management properties.

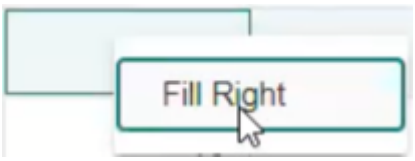
Role required: resource_manager

Procedure

1. Navigate to **Resource** > **Resource Workbench** > **Allocation Workbench**.
2. On the Allocation Boards page, select the allocation board whose operational resource plans you want to manage.
3. Select the **Configuration** icon (), and select **Operational plans**.
   The following management options are available in the resource grid, which displays the operational resource plans.

Task	Steps
Create an operational resource plan	Select the list icon ( ) next to **New Plan** on the top-right corner, and select **New Operational Plan**. After the operational resource plan is created, it appears under the Operational Resource Plans header in the resource grid.
Allocate a resource plan	**a.** Open a resource plan in the resource grid. **b.** Select the **Actions** icon ( ), and select **Change State > Allocate**.
Extend a resource plan	**a.** Open a resource plan in the resource grid. **b.** Select the **Actions** icon ( ), and select **Extend Resource Plan**. **c.** Enter the new end date of the resource plan in the **New end date** field. **d.** Select the type of request and select **Ok**.
Allocate extension	Allocate resources for the extended period requested by the project manager. **a.** Open a resource plan in the resource grid. **b.** Select the **Actions** icon ( ), and select **Allocate Extension**.
Allocate resources for a requested group, role, or user resource plan for the whole period of the resource plan	Allocate users the percentage of their capacity specified in the operational resource plan. For more information, see Confirm or allocate resources from the Allocation Workbench.
Allocate resources for a group, role, or user resource plan for a specific period	Allocate users the percentage of their capacity specified in the operational resource plan. For more information, see Confirm or allocate resources from the Allocation Workbench.

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Task	Steps
Delete a resource plan	**a.** Open a resource plan in the resource grid. **b.** Select the **Actions** icon (⋮), and select **Delete**.
Edit hours in the grid	Use one of the following ways: ○ Enter the value for an individual cell. **a.** Double-click a resource plan or a specific resource row. **b.** Edit the allocated hours of the resource plan or a resource in the grid. **c.** Move the pointer out of the cell to save. ○ Update multiple cells at once: You can copy the existing value from a cell and update the cells to its right. For example, you want to update the planned hours of a resource for all the months of the resource plan. ▪ Right-click on the cell that you want to copy the value from and select the **Fill Right** option.  ▪ Fill in the details of the number of cells that you want to update and the hours. ▪ Select **Update**. **Note:** The Fill Right option is available only on those columns that are editable. For example, a resource plan is in the Allocated state.
Reduce the duration of an allocated resource plan	If no actuals are posted for the future in the resource plan, then all allocated or confirmed hours of the resources are released when you reduce the resource plan. If actuals are posted for the future, then the resource plan end date is updated to the future date on which actuals are present. All allocated or confirmed hours of all resources from the date on which actuals are present to the original end date are released. **a.** Open a resource plan in the resource grid. **b.** Select the **Actions** icon (⋮) on a resource plan row in the resource grid.

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Task	Steps
	c. Select **Reduce Resource Plan**. **d.** Enter the new end date of the resource plan in the **End date** field, and select **Yes**.
Complete a resource plan	After all the associated tasks are complete or canceled, as a resource manager you can mark the resource plan complete and closed. **a.** Select the **Actions** icon (⋮) on a resource plan row in the resource grid. **b.** Select **Complete**. **c.** In the confirmation dialog box, select the **Completion date** option, and select **Yes**. The state of the plan changes to Complete.
Cancel a resource plan	When a resource plan is no longer required, as a resource manager you can cancel it, which also cancels its past and future allocations. **a.** Open a resource plan in the resource grid. **b.** Select the **Actions** icon (⋮) on a resource plan row in the resource grid. **c.** Select **Cancel**.
View the resource allocations at user level	In the resource grid section, expand a resource plan entry. The user level allocations are listed only for group and role resource plans. A negative value in a user row indicates that the user is over-allocated for that period. To see the resource over-allocation daily records of the user, select the value.

Resource schedules

Understand the default schedules used in Resource Management and learn how to create your own custom schedules.

Resource management uses a default schedule named Resource Management Schedule. The Resource Management Schedule has the following characteristics:

- Weekly on Weekdays
- Monday through Friday 08:00-12:00
- Monday through Friday 13:00-17:00

While planning a resource request for a resource plan, the user's schedule is considered to calculate planned and requested hours, if all users in that resource plan have the same schedule and that schedule is different from the resource management schedule.

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Default schedule

The schedule assigned to each user can be understood using the following information on the user profile.

- Value provided in the **Schedule** field.
- Schedules provided in the Schedules related list, with the **Context** field set to Resource Management.

  This related list can be seen in the Resource Manager view of the user profile.

If there are no entries in the Schedules related list, the value provided for the **Schedule** field is used to determine the resource schedule. If the Schedule field is empty too, then the schedule specified in the *Default Schedule Name (com.snc.resource_management.default_schedule)* property is applied as the resource schedule. To understand how to modify this property value, see Specify the default resource management schedule.

Custom schedules for resources

Check the default schedule associated to a resource and apply custom schedules to those resources who require it.

If custom schedules are necessary, work with your administrator to create them. An administrator can create a schedule as per your requirements and assign it to the user. This custom schedule can also be assigned to other users as appropriate.

The value specified for the **Schedule** field on a user profile overrides the schedule specified in the *Default Schedule Name* property.

Note:
The **Time zone** field of a schedule is recommended to be set to **Floating**.

If necessary, the administrator can create a hierarchy of schedules. This is useful if you want users to have a primary schedule such as Monday-Friday 8:00-17:00 and a secondary schedule such as Saturday-Sunday 12:00-16:00. See Custom schedule hierarchy.

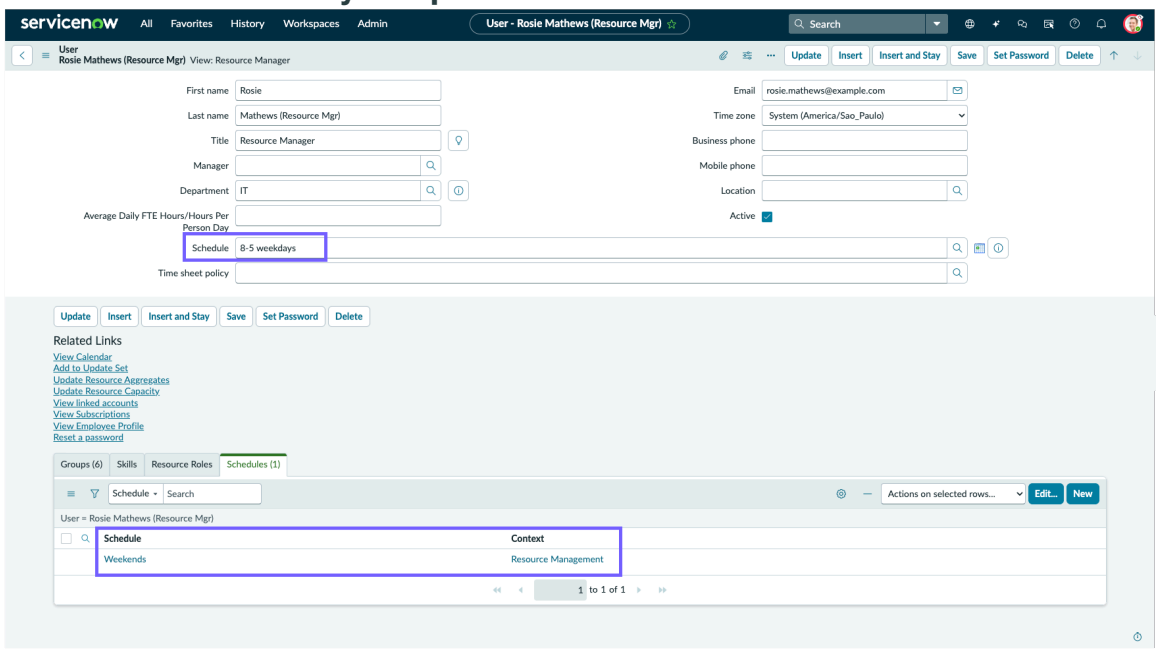
Custom schedule hierarchy

To create a schedule hierarchy for any user, use the Schedules related list. Create a schedule and within the new schedule, define the type, dates, and repeat schedule using the Schedule Entries related list.

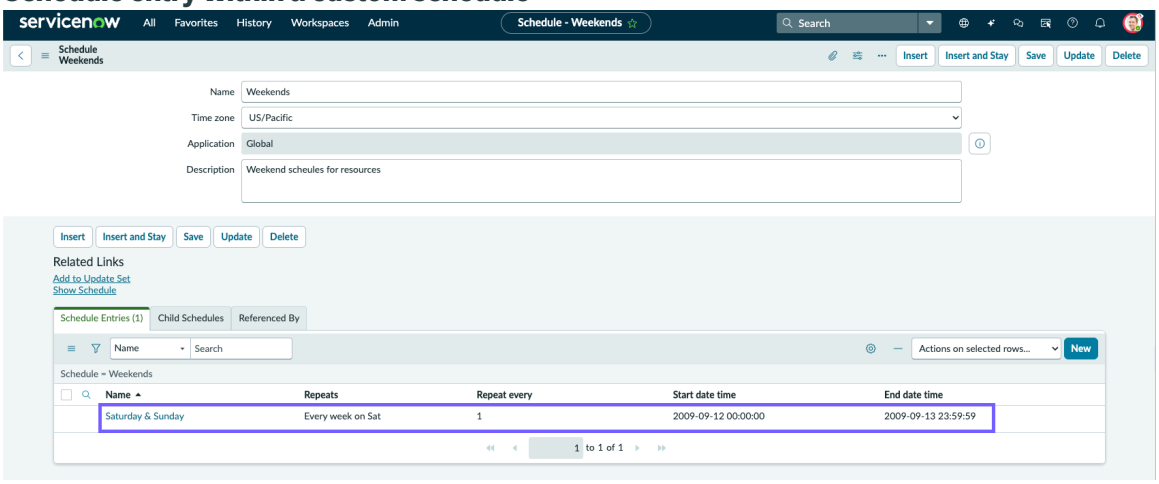
For example, Alene's usual schedule is 8-5 weekdays, which is specified in the **Schedule** field of their user profile. On top of the usual work, Alene also has to attend a site check every Saturday. The schedule for this appointment can be created from the Schedules related list.

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Custom schedule hierarchy example



Schedule entry within a custom schedule



Specify the default resource management schedule

Choose the default schedule to be applied to your resources.

Before you begin

Role required: it_pps_admin

About this task

The base system uses Resource Management Schedule. You can change the default schedule at any time by using the *`Default Schedule Name`* property.

Procedure

1. Navigate to **All** > **System Scheduler** > **Schedules** > **Schedules**.
2. Review the schedules and copy the Name of the schedule that you want to use.
3. Navigate to **Project Administration** > **Settings** > **Properties - Resource**.
4. In the **Default Schedule Name** property field, paste the name of the schedule that you identified in step 2.

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Resource events

A resource event is a block of time that a resource spends on a task.

Each time a resource manager makes an allocation, the system creates one or more resource events for that resource. The resource events appear on the user's personal calendar.

When a booking changes from soft to hard, resource events are created for the resource.

Resource events and schedules

Schedules classify time as work time and non-work time and can be associated with resources and with projects.

The My Calendar module shows the user's work schedule and non-work time.

When a resource manager makes an allocation, the following takes place automatically:

- The schedule associated with the specified resource is analyzed.
- The allocation type changes to **Hard** and calendar events are created for individual resources within the users' schedule. The hours are spread depending upon the hard allocation spread type.

Use the Calendar Event Duration property to control the default minimum unit for an event. See Resource Management properties for examples.

Note:
Over-allocation is allowed, starting with the Geneva release. However, no more than 24 hours can be allocated to a user during a given day. See Resource allocation for more information.

Resource event modifications

Resource events that aren’t part of a resource plan can be modified.

You can only modify events you created for yourself in the "My Calendar" module. If a resource manager added an event to your calendar, then only the resource manager can modify the event.

Resource managers can modify an event that is part of a resource plan by deleting the event and creating a one. For example, a resource manager allocates a resource to a task on a resource plan and then wants to change the task work type to *Phone Call*. The resource manager must delete the event and then create another event with the work type set to *Phone Call*.

Modify a resource event that is part of a resource plan

You can modify a resource event that is part of a resource plan.

Before you begin

Role required: resource_manager

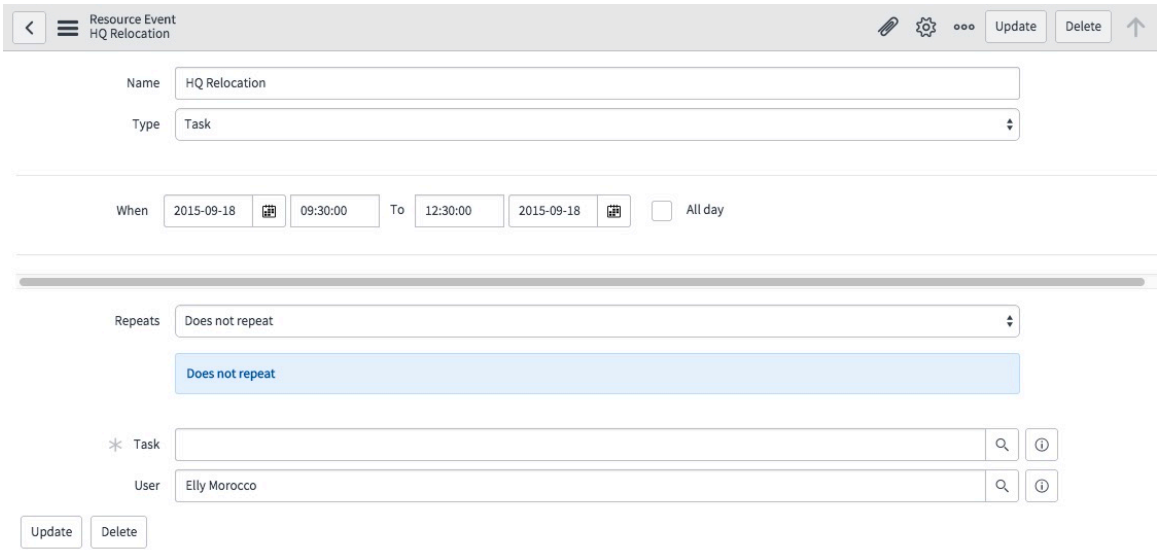
Procedure

1. Navigate to **Resource** > **Resource Plans** > **All**.
2. Select a plan **Number**.
3. In the **Resource Allocations** related list, select an allocation **Number**.
4. On the Resource Event form, update the fields.

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For a description of the field names, see Resource Event form.

A resource event



Modify a self-created resource event

You can modify a resource event that you created.

Before you begin

Role required: none

Procedure

1. Navigate to **All** > **Resource** > **Calendar** > **My Calendar**.
2. Double-click an event that has not been assigned to a resource plan.
3. Modify the event, as necessary.
4. Select **Update**.

Change the resource event color

Each event type is represented with a color. PPS admin can change the colors at any time.

Before you begin

Role required: it_pps_admin

Procedure

1. Navigate to **All** > **Project Administration** > **Settings** > **Resource Event Colors**.
2. Click an **Event Type**.
3. Specify a different **Color**.
4. Click **Update**.

Resource Management reports

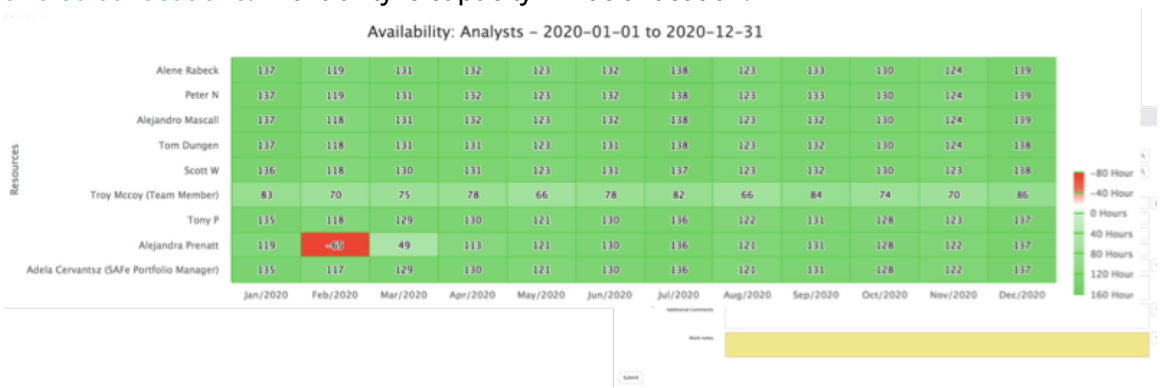
Resource Management reports provide the resource requester and resource managers with resource allocations, availability, and utilization.

You can generate reports for the following types of information:

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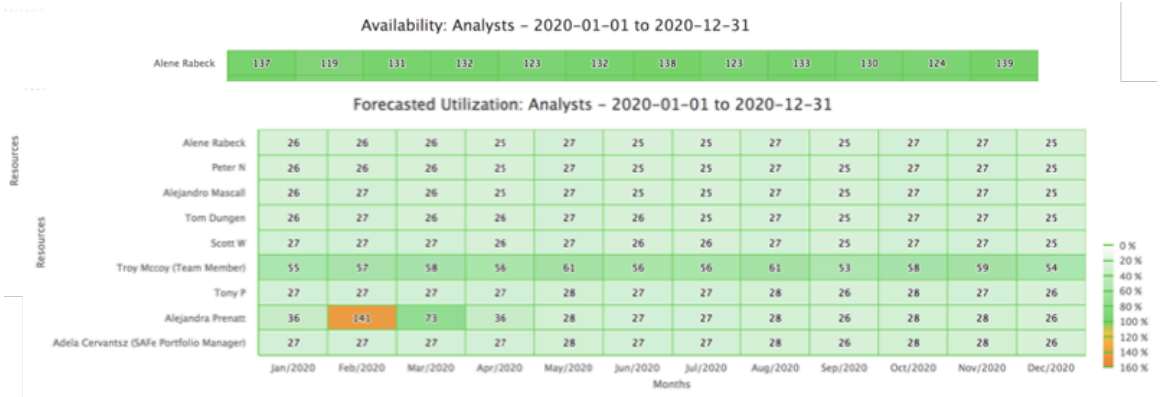
Availability

Total time that the resources are available after both hard and soft allocations. Availability is capacity minus allocation.



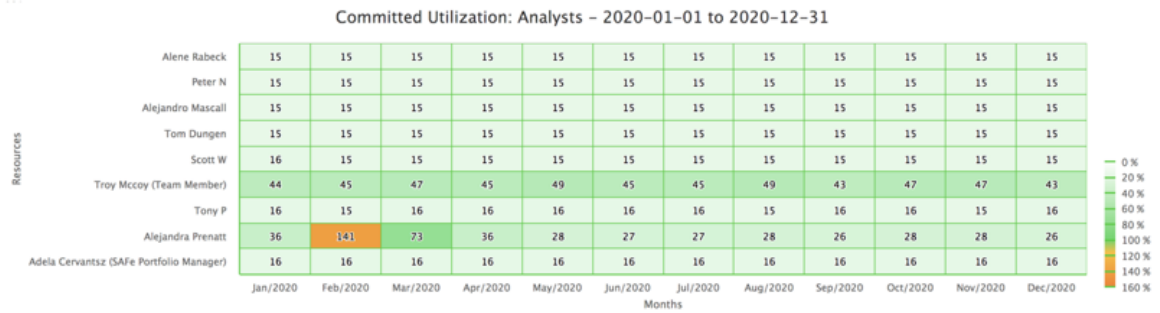
Forecasted Utilization

Percentage of forecasted resource time utilization. It is calculated as sum of allocated and confirmed hours, divided by the total capacity.



Committed Utilization

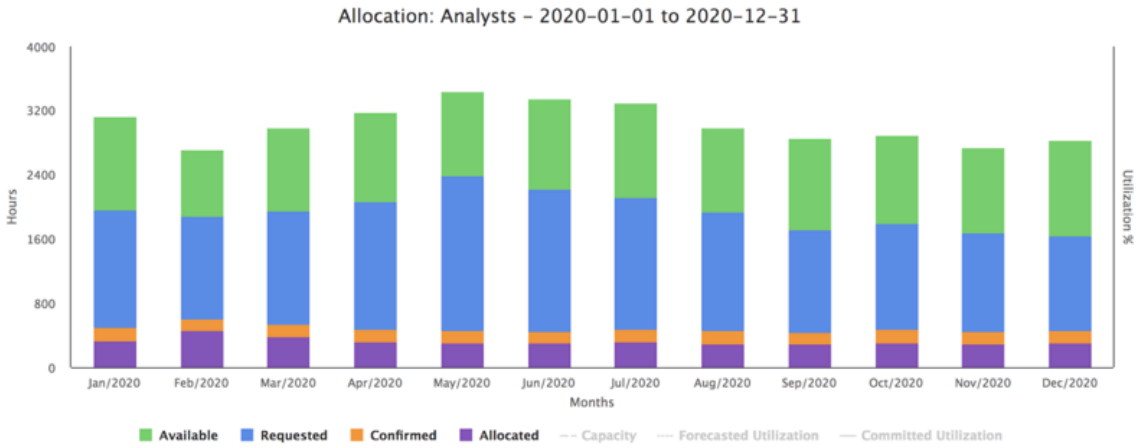
Percentage of committed resource time utilization. It is calculated as allocated hours divided by the total capacity.



Allocation

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Resource capacity, allocations, availability, and utilization.



Allocation details

A tabular breakdown of all allocation requests (soft bookings), committed allocations (hard bookings), availability, capacity, and actual hours.

If the actual hours for a resource is greater than the allocated hours, the actual hour's cell is highlighted and a message is displayed on mouse hover.

Allocation Details: Analysts - 2020-08-26 to 2021-08-25

	Months																	
	Aug/2020						Sep/2020						Oct/2020					
Resource	Capacity	Requested	Confirmed	Allocated	Actuals	Available	Capacity	Requested	Confirmed	Allocated	Actuals	Available	Capacity	Requested	Confirmed	Allocated	Actuals	Available
Adela Cervantsz (SAFe Portfolio Manager)	32	0	0	0	0	32	176	0	30	66	0	80	176	0	30	69	0	77
Alejandra Prenatt	32	6	0	0	0	32	176	30	30	66	0	80	176	30	30	69	0	77
Alejandro Mascall	32	0	0	0	0	32	176	0	30	63	0	83	176	0	30	66	0	80
Alene Rabeck	32	5	0	0	0	32	176	29	27	58	120	91	176	29	27	349	65	-200
Peter N	32	0	0	36	0	-4	176	0	27	268	0	-119	176	0	27	271	0	-122
Scott W	32	0	0	0	0	32	176	0	30	63	0	83	176	0	30	69	0	77
Tom Dungen	32	0	0	0	0	32	176	0	30	63	0	83	176	0	30	69	0	77
Tony P	32	0	0	0	0	32	176	0	30	66	0	80	176	0	30	69	0	77
Troy Mccoy (Team Member)	32	5	0	0	0	32	176	32	30	63	20	83	176	32	30	69	0	77

View availability, utilization, and allocation reports

You can view resource reports that focus on resource availability, utilization, and allocations.

Before you begin

Role required: admin, resource_user, or resource_manager

Procedure

1. Navigate to **All** > **Resource** > **Resource Reports** > **Resource Reports**.
2. On the Resource Reports form, Fill the fields.
   For a description of the field names, see Resource Reports form.
3. Select **Run** to view the report.

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Edit a resource management report

Resource management reports show resource allocation details in different formats for different time periods. Configure and use these reports according to your business requirements.

Before you begin
Role required: resource_user or admin

About this task
You can update the report settings like the aggregation type, request type, and calendar type for new reports. For example, you can edit the Resource - Group Allocation Details Monthly (Hrs) report to view the allocation details in terms of FTE instead of hours. You can also choose to view the charts associated with the reports by group bars or stack bars.

Procedure

1. Navigate to **All** > **Resource** > **Resource Reports** > **Reports-New**.
   The following reports are displayed.

   a. Select the **Edit** icon ( ) or select on the report name.

   b. Configure the report by updating the field values in the **Configuration** tab.

   c. Select **Run** to run the report, or select **Save** to run it later.

2. **Optional:** Select **Create a report** to create a new report.

My Calendar

Any user with the resource_user role can open My Calendar to view, add, and modify their planned work, actual work, operational work, administrative tasks, and personal activities.

After a user adds an event to the calendar, the time blocks for that event appear as red, indicating busy, on the resource console and the resource availability dashboard.

Resource managers view users' calendars to determine who has open time to complete tasks, and can add tasks to any resource's personal calendar. For every event that is created on a user's calendar, a record is created in the User Calendar Event [user_calendar_event] table. Resource events are chunks of busy time for the user. Users and resource managers can sometimes modify these records. See Resource event modifications.

The calendar uses time zones. Time is displayed to users in their local time zone according to user preferences. See Time zones in resource plans.

Each resource event is represented with a specific color. PPS admin can change these colors. See Change the resource event color

Note:
Although a user can add tasks, such as incidents, to their calendar, the user isn't added to the task's **Assigned to** field.

Add events to your calendar

Add tasks, events, and appointments to your calendar.

Before you begin
Role required: pps_resource or resource_manager

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About this task
To create an event that repeats daily, weekly, or monthly, see Create repeatable events.

Procedure
1. Navigate to **All** > **Self-Service** > **My Calendar**.

   The calendar appears in the week view by default, highlighting today's schedule. The user's off-duty schedule in gray.

2. Change the view as necessary.
   - Select Day, Week, or Month.
   - Use the forward or back arrows to navigate between days, weeks, and months.
   - Select a date using the calendar icon  .
   - Select **Today** to reset your calendar view to show today's calendar.
3. Open the Add Event form by double-clicking an empty cell on the calendar.
4. On the New event form, fill the fields.

   For a description of the field names, see New event form.

5. Select **Submit**.

Result
- When you add a calender event, the resource aggregate daily, weekly, and monthly tables are updated. The resource aggregate daily table isn't enabled by default. To generate daily aggregates and store them in this table, create the *com.snc.resource_management.generate_daily_aggregates* property and set its value to true.
- All the non-project events created for you from the calender appear as Operational Work for you in Resource Finder.

Create repeatable events

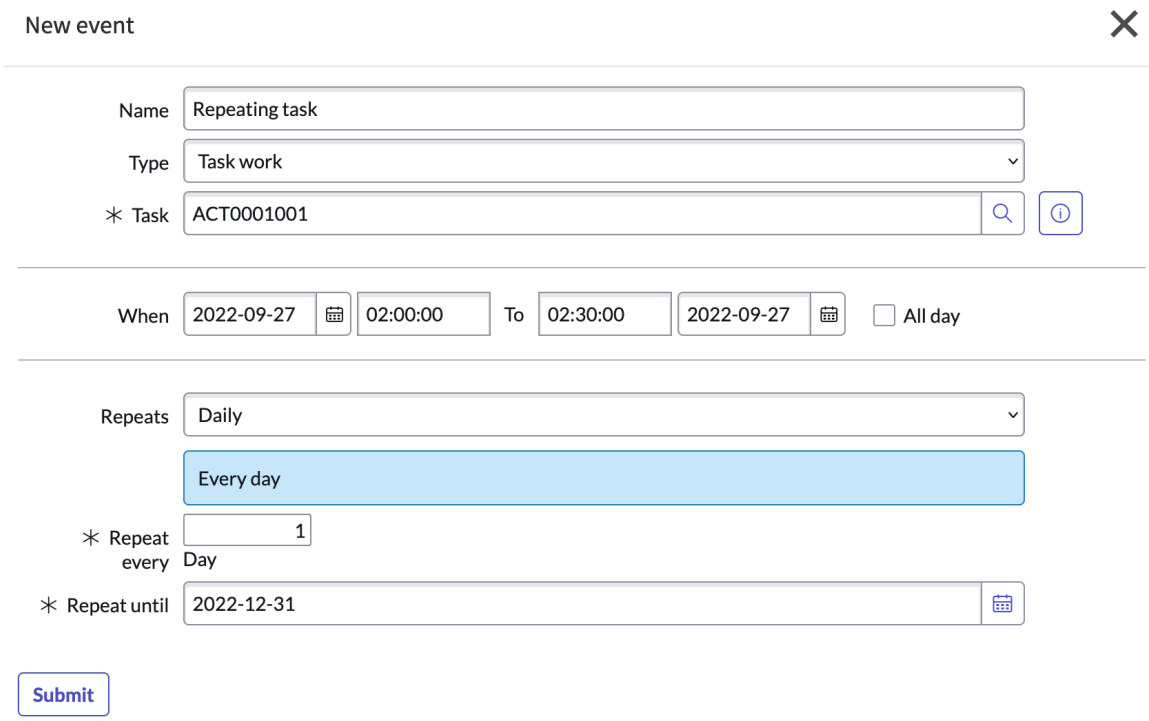
Events can be set to repeat on a regular schedule, such as every day, week, or month.

Before you begin
Role required: resource_manager

About this task
You can create events even if the timeslot is booked by some other event.

Procedure
1. Navigate to **All** > **Self-Service** > **My Calendar**.
2. Double-click an empty cell on the calendar.
3. On the New event form, fill the fields.
   For a description of the field names, see New event form.

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Note:
Dates in the When and To field should the same.

4. Click **Submit**.

View a user calendar

View the calendar of a user to check availability.

Before you begin
Role required: resource_manager

About this task
You can view a calendar for a specific user, and not for all users in a group.

Procedure

1. Navigate to **All** > **Resource** > **Resources** > **Users**.
2. Do one of the following options.

Option	Description
From the User list	Right-click a user name in the Users list and select **View Calendar**.
From the User form	Select a User record to open the User form, and then select the **View Calendar** related link.

Add events to a user calendar

Resource managers can add events to user calendars.

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Before you begin
Role required: resource_manager

Procedure

1. Navigate to **All** > **Resource** > **Resources** > **Users**.
2. Do one of the following.

Option	Description
From the User list	Right-click a user name in the Users list and select **View Calendar**.
From the User form	Select a User record to open the User form, and then select the **View Calendar** related link.

   The calendar for that user opens in a new window or tab.

3. Open the **Add Event** form by selecting an empty white cell on the calendar.
4. On the form, fill the fields.
   For description of the field names, see Add events to your calendar.

Result

- When you add a calender event, the resource aggregate daily, weekly, and monthly tables are updated. The resource aggregate daily table isn't enabled by default. To generate daily aggregates and store them in this table, create the *com.snc.resource_management.generate_daily_aggregates* property and set the value to true.
- All the non-project events created for a user from the calender appear as Operational Work for the user in Resource Finder.

Delete events

You can delete events you created at any time.

Before you begin
Role required: resource_user

About this task
You can't delete any events added to your calendar by a resource manager.

Procedure

1. Navigate to **All** > **Self-Service** > **My Calendar**.
2. Find the event to delete.

   Use the icons above the calendar to locate the appropriate day, week, or month.

3. Double-click the event.
4. Select **Delete**.
5. Select **OK**.

Result
When you delete a calender event, the resource aggregate daily, weekly, and monthly tables are updated accordingly. The resource aggregate daily table isn't enabled

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by default. To generate daily aggregates and store them in this table, create the *com.snc.resource_management.generate_daily_aggregates* property and set the value to true.

Use Resource Diagnostics to detect corrupt resource data

The Resource Diagnostics feature uses the Application Diagnostics Tool to detect corrupt data for a resource, such as duplicate aggregates for users, or dailies without a top task.

Before you begin

Role required: pps_admin

Procedure

1. Navigate to **All** > **Resource** > **Resource Diagnostics**.
2. On the Application Diagnostics Tool page, select **Resource Management**.
3. Select one or multiple diagnostic scans.
4. Select **Run Diagnostics**.
5. View results of the scan.
   It lists the duplicate aggregate for users or project-related resource allocation dailies without a top task, if any.

What to do next

Add your own diagnostic scans and fix scripts.

Add diagnostic features for resource

Create diagnostic features to evaluate an application feature and organize various diagnostic scans for an application. The diagnostic features appear in the target application and list all the diagnostic scans associated with the diagnostic feature for that application.

Before you begin

Role required: adt_admin

About this task

A diagnostic feature can consist of a single or multiple diagnostic scans. These diagnostic scans execute the scripts, that they're mapped with, to detect data corruption or invalid data. You can then create diagnostic scans with scripts and execute these scans to check resources for any corrupt or invalid data. If a fix script is associated with a scan, you can use it for fixing the corrupt or invalid data.

You can also define fields for users to create a specific filter condition. The diagnostic scripts use the results of these filter conditions as inputs for detecting any corrupt or invalid data.

You can check for the existing features under the **Features** module. If you don't find one matching your needs, create a diagnostic feature and associate it with an application.

Procedure

1. Navigate to **All** > **Application Diagnostics Tool** > **Features**.
2. Select **New**.
3. On the Diagnostics Feature form, fill the fields.
   For a description of the field names, see Diagnostics Feature form.
4. Define user input values for specifying filter conditions in the **Diagnostics Inputs** section.

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The fields in this section are displayed in the application as condition builder. For a description of the field names, see Diagnostics Inputs form.

5. Select **Submit**.

What to do next
Create diagnostic scripts and add fix scripts to use with the diagnostic feature. For more information, see Add diagnostics and fix scripts for resource.

Add diagnostics and fix scripts for resource

Add existing or new diagnostic scripts to scan the data in your application for any corruption. You can also attach fix scripts to rectify the corrupt or invalid data identified by the diagnostic script.

Before you begin
Role required: adt_admin

About this task
You can create multiple diagnostic scripts to check various aspects of data. The results of the filter conditions, that you specify in a diagnostic feature, is used as an input for the diagnostic script while executing. You can also use the result of one script in subsequent scripts.

Procedure
1. Navigate to **All** > **Application Diagnostics Tool** > **Scripts**.
2. Select **New**.
3. On the Diagnostics Scripts form, fill the fields.
   For a description of the field names, see Diagnostics Scripts form.
4. **Optional:** If you want to include a script for fixing the corrupt or invalid data identified by the diagnostic script, select the **Has Fix script** check box.
5. Use **Fix script Access Roles** to move required roles to the Selected list.
   The users with the selected roles can access the diagnostic script.
6. In the **Fix script** section, add the actual code for the fix script.
7. Select **Submit**.

Create diagnostic scan and map scripts for resource

Create a diagnostics scan and map diagnostic feature with diagnostic and fix scripts. You can create a diagnostic scan to execute diagnostic scripts to check the health of data in your application. Use the fix scripts to rectify any corrupt or invalid data that the diagnostic scan identifies.

Before you begin
- Role required: adt_admin
- Create diagnostic features. For more information, see Add diagnostics features for resource.
- Create diagnostic and fix scripts. For more information, see Add diagnostics and fix scripts.

About this task
After creating diagnostic features, diagnostic scripts, and fix scripts, map the diagnostic features and scripts to create a diagnostic scan. You can map multiple scripts with each diagnostic scan and define the order of their execution.

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Procedure

1. Navigate to **All** > **Application Diagnostics Tool** > **Diagnostics**.
2. Select **New**.
3. On the Diagnostics form, fill the fields.
   For a description of the field names, see Diagnostics form.
4. Search for and select diagnostic scripts to map with the diagnostic scan in the **Diagnostics and Script Mappings** section.
5. Select **Submit**.

Resource Management reference

Reference information to provide additional details about Resource Management such as the fields, user roles, tables, and guidelines.

Resource Management properties

The Resource Management application provides several properties to control allocations, schedules, and other settings.

You need the PPS admin role to access the Resource properties.

To manage resource properties, navigate to **Project Administration** > **Settings** > **Properties – Resource**.

Resource management properties

Property	Description	Default value
Maximum number of daily resource allocation records that should be considered in synchronous mode for confirmation and allocation. (*com.snc.resource_management.plan.auto_async_threshold*)	Determines the maximum number of daily resource allocation records that should be considered in synchronous mode during confirmation and allocation. The property improves the system performance when the number of daily allocation records is more than the value set in the property. The default value is 2600 which implies that the number of daily records considered for confirmation or allocation in synchronous mode is 2600. The value is equivalent to confirming or allocating 10 users on a group resource plan for 1-year duration (260 working days) or 5 users for 2-year duration, and so on. If the group resource plan contains 11 users for 1-year duration, the number of daily records are 2860. Thus the confirmation and allocation of the resource plan in this case is in asynchronous mode. If you always want to confirm and allocate the resource plan in synchronous mode, set the value of the property to a higher number based on your requirements.	2600

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Resource management properties (continued)

Property	Description	Default value
	Note: If the property *com.snc.resource_management.run_state_changes_async* is set to true, the confirmation and allocation of resource plans is always considered in asynchronous mode.	
Show Week/Month toggle on resource grid interface (*com.snc.resource_management.show_week_month_toggle*)	Shows the toggle button for switching between week and month in the resource grid.	Yes
Maximum time duration in Resource Finder in months(*com.snc.resource_management.max_dur_resource_finder*)	The maximum duration for which the resource details should be shown in the resource finder.	24
Use budget reference rates to calculate the Resource requested/ allocated cost to derive hourly rate from Labor rate cards (*com.snc.resource_management.use_budget_reference_rates*)	• When the property is set to Yes, the budget reference rates [itfm_fx_rate] are used to calculate the resource requested or allocated cost. • When the property is set to No, exchange rates [fx_rate] are used to calculate the resource requested or allocated cost. For upgraded customers, the property is by default set to No.	Yes
Maximum number of days for which a resource plan can be created (*com.snc.resource_management.plan.max_duration*)	Restricts the maximum number of days for which a resource plan should be created.	3660
Default Schedule Name (*com.snc.resource_management.default_schedule*)	The schedule on the instance that the Resource Management application uses by default.	Resource Management Schedule
If resource_management reporting for a resource/group has value of percentage_allocation less than this value the color is shown as green. (*com.snc.resource_management.percentage_allocation_normal*)	The value that determines when the availability of the resource is shown as green on the resource report. Green signifies that the resource is not being fully utilized and is probably available to have the work allocated.	50

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Resource management properties (continued)

Property	Description	Default value
If resource_management reporting for a resource/group has value of percentage_allocation less than this value and greater than the com.snc.resource_management.percentage_allocation_normal, then color is shown as orange. (*com.snc.resource_management.percentage_allocation_warning*)	The value that determines when the availability of the resource is shown as orange on the resource report. Orange signifies the resource does not have much availability.	90
Average Daily FTE Hours/Hours Per Person Day (*com.snc.resource_management.average_daily_fte_hours*)	The average daily full-time equivalent in hours or number of hours per person day. This value is used as the equivalent of a full-time day if no value is specified in the **Average Daily FTE Hours/Hours Per Person Day** field on the user or group resource record. **Note:** Capacity is not derived from FTE, but from schedules. Both FTE and schedules must be in synchronization with each other.	8 (hours)
Calendar Event Duration (Minutes) (*com.snc.resource_management.allocation_interval_minutes*)	The default duration for a calendar event. Resource allocations use this property to create allocations with a decimal value. For example, a user is available for three blocks of time: two 30-minute blocks and one 60-minute block. • If the value of this property is set to 30 minutes, and 1 hour needs to be allocated to the user, the allocation is divided into the two 30-minute blocks when the user is available. • If the value of this property is set to 60 minutes, the allocation is given to the 60-minute block. **Note:** When you are changing the default value, enter a value which results a finite value when divided by 60. For example, 6, 12, 15, 30 and so on.	60 (minutes)
First Day of Week (Monday = 1, Sunday = 7) (*com.snc.resource_management.first_day_of_week*)	Determines which day of the week is the first day. The resource workbench uses this value to calculate the week number. For example, a resource is requested from October 14 (Wednesday) to October 21 (Wednesday).	1 (Monday)

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Resource management properties (continued)

Property	Description	Default value
	If the value of this property is set to 2 (Tuesday), the allocation is made and presented in the workbench in two blocks: • From Wednesday October 14 to Saturday October 15. • Tuesday October 20.	
Perform Resource Confirmation/ Allocation/ Cancellation in asynchronous mode (*com.snc.resource_management.run_state_changes_async*)	Uses asynchronous mode when confirming, allocating, or canceling resource plans to improve application performance. Because resource confirmation and allocation create calendar events for each resource in a group and also consider each resources schedule, the confirmation, and allocation process can take an excessively long time to complete. In asynchronous mode, the application uses an event manager to handle errors that might occur when processing the state of the resource plan. If the property is enabled: • The state of the resource plan changes to Confirmation in Progress / Allocation in Progress / Cancellation in Progress. • If the confirmation, allocation, or cancellation does not work, the **Confirm**, **Allocate**, or **Cancel** UI actions appear so you can reprocess the action. If an allocation is only partially completed, you can click the **Allocate** UI action again to remove all previously created events for the plan and reprocesses the action. Enable this property if you encounter errors or longer processing times when handling confirmations, allocations, or cancellations. This might occur if there are more than 25 members in a group or if the duration of the resource plan exceeds 6 months.	No
Comma-separated list of resource event types which will be excluded from user's schedule to calculate available capacity and to avoid making resource allocations on the days having these events (time_off,	Specifies which events must be excluded for capacity calculations of the resources and when the system must not create events. The events to be entered must be from the **Category** field in the time card table.	time_off

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Resource management properties (continued)

Property	Description	Default value
meeting, and so on) (*com.snc.resource_management.exclude_events_from_schedule*)		
Show soft allocations in calendar for (*com.snc.resource_management.calendar.show.soft.allocations*)	Shows the following options: • Resource Managers: When selected, soft allocations can be seen in the calendar by the resource managers only. • Everyone: When selected, soft allocations can be seen in the calendar by all users who have the PPS Resource role.	Resource Managers
Number of records fetched at a time in Resource Grid(*com.snc.resource_management.number_of_records_to_fetch_at_a_time*)	The number of records that are fetched in resource grid in one server call. For example, if there are 100 projects in an allocation board, only 30 are fetched in the first call. When the user scrolls down, a call is made to fetch the next 30 projects. Similarly, when the user expands a project containing, say 100 resource plans, only 30 resource plans are fetched in the first call. Upon scrolling, the next 30 plans are fetched, and so on.	30
Do not allow resource plan dates to be outside the Project/ Demand dates (*com.snc.resource_management.do_not_allow_resource_plan_dates_outside_projec*	Restricts the entry of resource plan dates that go beyond the project or demand dates to avoid discrepancies between project or demand dates and resource plan dates. If this property is enabled, the resource plan start and end dates must be within the project or demand dates when you create, extend, shift, move, or change the state of a resource plan from requested to confirm or allocate.	No
Create and manage operational resource plans from the resource allocation workbench (*com.snc.resource_management.create_and_manage_operational_resource_plans_fr*	Enables the creation and management of operational resource plans from the Resource Allocation Workbench.	No
Limit the number of users retrieved for a group or role in Resource Finder search (*com.snc.resource_management.number_of_users_to_fetch_in_finder_at_once*)	Sets the maximum number of users that must be displayed for a group or role while searching for users in Resource Finder	50

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Resource management properties (continued)

Property	Description	Default value
Allocate more than 24 hours of effort a day per resource (*com.snc.resource_management.allocate_more_than_24hours_per_day*)	Allocates more than 24 hours of efforts for a resource per a day.	No
Exclude resource assignments in specific states from capacity calculation (*com.snc.resource_management.exclude_status_from_availability*)	Excludes the resource assignments with defined statuses from calculating resource availability and aggregates. You can enter comma separated values such as Pending, Unapproved, Draft, or so on.	This field is left empty.

Resource Plan form

Field descriptions for the resource plan form fields.

Resource Plan form

Field	Description
Number	Automatically generated identification number for the plan.
Resource type	Category of resource. To select a group, select **Group**. To select an individual user, select **User**. To select a resource by role, select **Role**.
Group	Specific group resource to associate with the plan. If you select **Role** in the **Resource type** field, then the **Group** list contains groups only for the selected role.
User	Specific user resource to associate with the plan. This field appears if you select **User** in the **Resource type** field.
Role	Specific resource role that you want to associate with the plan. This field appears if you select **Role** in the **Resource type** field.
Members preference	Specific members, any member, or all members from the selected group or role. The default is **All members**. This field appears only when the **Group** or **Role** option is selected in the **Resource type** field. • To request all members of a group or role, select **All members**. The requested time gets split among all members of the selected group or role proportionally depending on their capacity. Before making the hard allocation, if all members are not required, the resource manager can select only the desired members of the group or role. • To request specific members of a group or role, select **Specific members**, and then select members from the **Members list**. The requested time gets split

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Resource Plan form (continued)

Field	Description
	among the selected members of the selected group or role proportionally depending on their capacity. • To select any member of a group or role, select **Any member**. Resources that are most available during the plan duration are requested first. Soft allocation is created only for these resources on confirmation. For more information about the effect of members preference on the calculation of hours for soft and hard allocations, see Resource allocation. **Note:** This field is not available by default on the form when opened from the resource grid. If required, you can configure these fields. If the resource plan is created from the list view, the fields are already available.
Skills	Specific skills the requested resources should possess to allocate them to the resource plan. This field appears if you select **Group** or **Role** in the **Resource type** field, and **All members** or **Any member** in the **Members preference** field. For more information, see Skills Management.
Request type	Type of request. To specify a request in hours, select **Hours**. To specify a request in full-time equivalents, select **FTE**.
FTE	Number of units for the full-time equivalent selection. This field appears if you select **FTE** in the **Request type** field. For more information, see Resource plans.
Planned hours	Estimated number of work hours required to complete all resource plan work. **Note:** If all users in a resource plan have the same schedule and that schedule is different from the resource management schedule, then the user's schedule is considered to calculate planned hours,
Name	Descriptive name for the plan. If you do not enter a name, the name becomes the **Number** + **Short description**. If the short description for the task is empty, the plan number is used.
Task	Task to which the plan applies. If the resource plan was created from a project task, the task number appears here.
Start Date	Start date for the resource plan. By default, this field shows the **Planned start date** of the associated project record or task record. Edit the default date, if necessary. **Note:** The start date of the resource plan cannot be before the project or demand start date if the **Do not allow resource plan dates to be outside the Project/ Demand dates** property is enabled.

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Resource Plan form (continued)

Field	Description
End Date	End date for the resource plan. By default, the date is derived from the **Planned end date** of the associated project record or task record. Edit the default date, if necessary. **Note:** The end date of the resource plan cannot be after the project or demand start date if the **Do not allow resource plan dates to be outside the Project/ Demand dates** property is enabled.
Allocation spread	Type of hard allocation. The value in this field determines the manner in which the allocated hours are spread while creating hard allocations. Select either option: • **Even**: Create resource events for the resource by splitting the hours evenly across all working days for the allocation duration. • **Front load**: Create resource events for the resource by filling up all available slots of the resource from the start date of the allocation. For example, if a resource is requested for 30 hours in Week 10: • Selecting **Even** equally divides 30 hours to all weekdays, that is, 6 hours per day for a five-day work week. • Selecting **Front load** first consumes all available hours on Monday, then move on to Tuesday, and so on, until all 30 hours are allocated. If the resource is not available for 30 hours in Week 10, Front load over-allocates by filling up the remaining hours from start date up to 24 hours per day. **Note:** This field is not available by default on the form when opened from the resource grid. If required, you can configure these fields. If the resource plan is created from the list view, the fields are already available.
State	State of the resource plan. The plan starts in the Planning state. **Note:** This field is not available by default on the form when opened from the resource grid. If required, you can configure these fields. If the resource plan is created from the list view, the fields are already available.
Rate override	Option for overriding the hourly rate derived from the rate model or the labor rate card. When the option is selected, • The planned, confirmed, and allocated costs of the resource plan is derived from the rate specified in the **Resource Rate** field. • When the user submits the time card for the resource plan, the rate specified in the **Resource Rate** field is used to calculate the actual cost of the resource plan. The option is enabled only if the resource plan is in the Planned state. By default, the option is not selected.

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Resource Plan form (continued)

Field	Description
Resource rate	Hourly rate of resource that overrides the hourly rate returned from the rate model to calculate the planned and actual costs of the resource plan. This field appears when the **Rate override** option is selected. If you clear the **Rate override** check box, the resource rate value is also cleared and removed from all calculations. On selecting the **Rate override** check box again, the previous resource rate is not retrieved.

Note:
The **Members Preference**, **Allocation spread**, and **State** fields are not available by default on the form when opened from the resource grid. If required, you can configure these fields. If the resource plan is created from the list view, the fields are already available.

Resource Plan form tabs

Use the resource plan form tabs to create a resource plan.

Resource details tab fields

Field	Description
Resource type	Type of resource selected during the creation of resource plan.
Group	Group associated with the resource plan.
Role	Role associated with a role resource plan.
User	User associated with a user resource plan.
Skills	Skills that the requested resources possess to allocate them to the resource plan. **Note:** This field is only available for resource plans with all or any members preference.
Members preference	Specific members, any member, or all members from the selected group or role.
Members list	Resources selected as specific members for specific members preference resource plan.
Confirmed/ Allocated users	Resources that are confirmed/allocated by the resource manager for resource plans. By default, this field is displayed for specific members preference type of resource plans.

Request Details tab fields

Field	Description
Request type	Type of request selected during the creation of resource plan.

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Request Details tab fields (continued)

Field	Description
	• If you select **FTE** in the **Request Type** field, the **FTE** field is displayed. • If you select **Person Days** in the **Request Type** field, the **Person days** field is displayed.
Planned hours	Estimated number of work hours required to complete all resource plan work.
Confirmed/Allocated hours	Confirmed or allocated hours rolled up from resource allocations.
Actual hours	Actual hours rolled up from time card entries.
FTE	Number of units for the full-time equivalent selection.
Demand currency	Type of currency associated with the demand task when the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin is activated and Demand Currency view is enabled. For more information, see the Multicurrency in Demand Management topic.
Project currency	Type of currency associated with the project or project task when the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin is activated and Project Currency view is enabled. For more information, see the Multicurrency in Project Management topic.
Planned cost	Amount in **Planned hours** multiplied by the hourly rate of the specified user or group resource. This amount is a first-draft estimate of the resource plan cost. The hourly rate is derived from one of the following sources: • If the **Rate override** option is selected, the hourly rate specified in the **Resource rate** field is used. • If a rate model is populated on the project or demand to which the resource plan is associated, the hourly rate is derived from the rate model. • If the resource plan is assigned to a specific user and the time sheet policy of the user is set for multiple rate types, the planned cost is determined using the labor rate card with the default rate type. If the default rate type is inactive, the system rate is used to determine the planned cost.

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Request Details tab fields (continued)

Field	Description
	• If the resource plan is assigned to a specific user and the time sheet policy of the user is not set for multiple rate types, the planned cost is determined using the labor rate card with no rate type. Otherwise, the system rate is used. • If the hourly rate is in non-functional currency, budget reference rates are used. **Note:** Setting up rates for resources would provide more accurate forecast and plan costs for resource plans. Planned cost is rolled up from Requested Allocations for plans in the Planning or Requested state and from Resource allocations for plans in the Confirmed or Allocated state. While requesting resources from a group, if a resource role is specified, the planned cost is calculated from the hourly rate of the specified role.
Planned cost in demand currency	Planned cost of a resource plan associated to a demand or demand task in the demand currency when the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin is activated and the Demand Currency view is enabled. The Planned cost in demand currency value is derived by multiplying planned hours with the hourly rate of the specified user or group resource, and then converting the result to the demand currency based on the budget reference rates.
Planned cost in project currency	Planned cost of a resource plan associated to a project or project task in the project currency when the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin is activated and the Project Currency view is enabled. The Planned cost in project currency value is derived by multiplying planned hours with the hourly rate of the specified user or group resource, and then converting the result to the project currency based on the budget reference rates.
Confirmed/Allocated cost	Amount of confirmed or allocated hours multiplied by the hourly rate of the confirmed or allocated resources. Provides a more accurate estimation of the cost of the plan that is confirmed or allocated.

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Request Details tab fields (continued)

Field	Description
	• If the **Rate override** option is selected, the hourly rate specified in the **Resource rate** field is used. • If a rate model is populated on the project or demand to which the resource plan is associated, the hourly rate is derived from the rate model. • If rate model is not available, labor rate card determines the hourly rate. • If no labor card is found for the user, the hourly rate is taken from the following time card property: **Default hourly rate used when processing time cards if we can't get a rate from labor rate cards (in system currency)**.
Confirmed/Allocated cost in demand currency	Confirmed or allocated cost of a resource plan associated to a demand or demand task in the demand currency when the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin is activated and the Demand Currency view is enabled. The Confirmed/Allocated cost in demand currency value is derived by multiplying the confirmed or allocated hours with the hourly rate of the confirmed or allocated resources, and then converting the result to the demand currency based on the budget reference rates.
Confirmed/Allocated cost in project currency	Confirmed or allocated cost of a resource plan associated to a project or project task in the project currency when the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin is activated and the Project Currency view is enabled. The Confirmed/Allocated cost in project currency value is derived by multiplying the confirmed or allocated hours with the hourly rate of the confirmed or allocated resources, and then converting the result to the project currency based on the budget reference rates.
Actual cost	Based on the same time cards used for the Actual hours, the actual cost is calculated using the hourly rate of each user and the hours worked. Used to inform resource requesters and resource managers of actual costs based on the actual hours that user resources added on their approved time cards.

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Request Details tab fields (continued)

Field	Description
	The hourly rate is derived as: • If the **Rate override** option is selected, the hourly rate specified in the **Resource rate** field is used. • If a rate model is populated on the project or demand to which the resource plan is associated, the hourly rate is derived from the rate model. • If the time sheet policy of a user is set for multiple rate types, the actual cost is determined using the labor rate card with the default rate type. • If the default rate type is inactive, the system rate is used to determine the actual cost. • If the time sheet policy of a user is set for multiple rate types, the actual cost is determined using the labor rate card with no rate type. Otherwise, the system rate is used.
Actual cost in demand currency	Actual cost of a resource plan associated to demand or demand task in the demand currency when the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin is activated and the Demand Currency view is enabled. The Actual cost in demand currency value is derived by multiplying the hourly rate of each user with the hours worked, and then converting the result to the demand currency based on the exchange rates.
Actual cost in project currency	Actual cost of a resource plan associated to a project or project task in the project currency when the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin is activated and the Project Currency view is enabled. The Actual cost in project currency value is derived by multiplying the hourly rate of each user with the hours worked, and then converting the result to the project currency based on the exchange rates.

Allocation Config tab fields

Field	Description
Allocation type	Type of resource distribution across the project that determines the type of allocation records. The value in this field determines how the planned hours are distributed across

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Allocation Config tab fields (continued)

Field	Description
	resource plan duration among requested resources: • **Weekly**: Create week-long allocations up to the end of the planned end date. • **Monthly**: Create month-long allocations up to the end of the planned end date. (Default value.) • **Plan Duration**: Create one allocation for each user for the entire duration of the resource plan. For example, if a resource is requested from January 1 to March 31, the following records would be created for each type: • **Monthly**: 3 allocation records, one for each month. • **Weekly**: 14 allocation records, one for each week with Monday being the first day of the week. • **Plan duration**: Only 1 record for the entire duration of the resource plan.
Allocation spread	Type of hard allocation selected during the creation of the resource plan.

Notes tab field

Field	Description
Notes	Other correspondence and notes about the resource plan.

Resource assignment form

Description for the resource assignment form fields.

Resource assignment form

Field	Description
Resource	Specific user resource to associate with the plan. **Note:** If you select a specific resource, the Group, Role, and Skill planning attributes associated to the resource are auto populated.
Group	Group of resources to associate with the plan.

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Resource assignment form (continued)

Field	Description
Role	Role of the resources to associate with the plan.
Skill	Skill of the resources to associate with the plan.
Effort type	Type of the effort to associate with the plan. Select **Hours** to request defined set of hours or select **% Capacity** to request certain percentage of the resource capacity.
Effort	Amount of effort type required.
Operational work type	Type of operational work: KTLO, Admin, Meeting, Training, Out of office, External labor, Time off, Appointment, and Phone call.
Rate model	Rate model assigned to the operational resource plan. The rate model is used to derive hourly rates for the resource plan. If you change or remove the rate model assigned to an operational resource plan, the cost fields on the plan are re-calculated.
Start date	Date when the operational resource plan starts.
End date	Date when the operational resource plan ends.
Resource status	Status of the resource assignment.

Resource Plan related links and lists

Use the resource plan related links and list to clone the resource plan details, view resource workbench, update cost plans, recalculate resource costs, or work on the modifying the request allocations.

Related Links

Field	Description
Copy Resource Plan	Copies the opened resource plan into a new resource plan.
Resource Workbench	Opens the workbench. The link appears only for the resource manager for resource plans in Confirmed or Allocated state.
Update Cost Plan	If you are using Project Portfolio Management, resource plans automatically create cost plans for a project or demand. Whenever you update the resource plan, click **Update Cost Plan** to keep the cost plan up-to-date.

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Related Links (continued)

Field	Description
	Note: The cost plan associated to a resource plan is also automatically updated when the resource plan is updated.
Recalculate Resource Cost	Recalculates the resource costs of the resource plan whenever the hourly rates change in the rate model to keep the costs up-to-date.

Related Lists

Requested Allocations	List of requested allocations for the resource plan. The number of requested allocation records created depends on the value of the **Allocation type** field. For example, if a resource is requested from January 1 to March 31, the following requested allocation records are created for each type: • **Monthly**: 3 allocation records, one for each month. • **Weekly**: 14 allocation records, one for each week with Monday being the first day of the week. • **Plan duration**: Only 1 record for the entire planned duration.
Resource Allocations	List of resources allocated to the plan.
Resource Plan Logs	Lists any error or warnings that might occur during resource allocation.

Resource form

Use the resource form to create an operational resource plans.

Resource form

Field	Description
Number	Automatically generated identification number for the operational resource plan.
Resource type	Resource category. To select a group, select the **Group** option. To select an individual user, select the **User** option. To select a resource by role, select **Role**.
Group	Group for which the operational resource plan is created. If you select **Role** in the **Resource type** field, then the choice list displays the groups for the selected role.

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Resource form (continued)

Field	Description
User	User for whom the operational resource plan is created. This option appears if you select **User** in the **Resource type** field.
Role	Specific resource role that you want to associate with the plan. This option appears if you select **Group** or **Role** in the **Resource type** field. If you select **Group** in the **Resource type** field, then the choice list displays the roles for the selected group.
Members preference	Specific members or all members from the selected group or role. The default is set to **All members**. This field appears only when the **Group** or **Role** option is selected in the **Resource type** field. • If the **All members** option is selected, the resource plan includes all members of the selected group or role. Time is proportionally divided among the selected group or role members, depending upon their capacity. Before making the hard allocation, if all members are not required, as a resource manager, you can select only specific members from the group or role. • If the **Specific member** option is selected, a request is made for the specified members. The requested hours are proportionately split among specified users of the group or role, based on their available capacity.
Skills	Specific skill(s) that you want to associate with the plan. This field appears only when the **All members** option is selected in the **Members preference** field. For more information on skills management, see Skills Management.
Request type	Type of request: **Hourly** or **% Capacity**. To estimate the work in hours, select the **Hourly** option. To estimate the work in percentage of capacity, select the **%Capacity** option.
Planned hours	Estimated number of hours required to complete the operational work.
Confirmed/ Allocated hours	Hours of a resource confirmed or allocated for operational work.
Actual hours	Hours spent on a planned operational task. **Note:** When you submit a time card, upon approval of the time card, actual hours are updated for an allocation record of an operational resource plan.
Name	Descriptive name for the operational resource plan.
Operational work type	Type of operational work: KTLO, Admin, Meeting, Training, Out of office, External labor, Time off, Appointment, and Phone call. The default is **KTLO**.
Rate model	Rate model assigned to the operational resource plan. The rate model is used to derive hourly rates for the resource plan. If you change or remove the rate model assigned to an operational resource plan, the cost fields on the plan are re-calculated.

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Resource form (continued)

Field	Description
Start date	Date when the operational resource plan starts.
End date	Date when the operational resource plan ends.
Allocation type	Resource distribution type that determines the type of allocation records. The value in this field determines how the planned hours are distributed across the resource plan duration, among requested resources. Select any of the following options: • **Weekly**: Creates week-long allocations up to the end of the planned end date. • **Monthly**: Creates month-long allocations up to the end of the planned end date. Monthly is the default value. • **Plan Duration**: Creates one allocation for each user for the entire duration of the resource plan. For example, if a resource is requested from Jan. 1st to Mar. 31st, the following records are created for each type: • **Monthly**: 3 allocation records, one for each month. • **Weekly**: 14 allocation records, one for each week with Monday being first day of the week. • **Plan Duration**: Only 1 record for the entire duration of the resource plan.
Allocation spread	Type of allocation spread. The value in this field determines the manner in which the allocated hours are spread while creating hard allocations: • **Even**: Creates resource events for the resource by splitting the hours evenly across all the working days for the allocation duration. • **Front Load**: Creates resource events for the resource by filling up all the available slots of the resource from the start date of the allocation. For example, if a resource is requested for 30 hours in week 10, then: • Selecting **Even** equally divides 30 hours between all weekdays, which is 6 hours per day for a five-day work week. • Selecting **Front Load**consumes all the available hours on Monday, moves on to Tuesday, and so on, until all the 30 hours are allocated. If the resource is not available for 30 hours in week 10, it over-allocates by filling up the remaining hours from the start date up to 24 hours per day.
State	A plan starts in the **Planning** state. The plan moves to the Requested state after its submission.
Planned cost	Amount, in *Planned Hours*, multiplied by the hourly rate of the specified user or group resource. Planned cost is a first draft estimate of the resource plan cost. Planned cost is rolled up from Requested Allocations for plans in the Planning or Requested states and from resource allocations for plans in the Allocated state. The hourly rate is derived from one of the following sources:

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Resource form (continued)

Field	Description
	• Rate model, if it is populated on the operational resource plan. • Labor rate card, if rate model is not available. • System property *com.snc.time_card.default_rate* if all the other conditions fail. **Note:** When requesting resources from a group, if a resource role is specified, the planned cost is calculated from the hourly rate of the specified role.
Confirmed/ Allocated cost	Amount of confirmed or allocated hours multiplied by the hourly rate of the confirmed or allocated resources. Provides a more accurate estimation of the cost of the plan that is confirmed or allocated. The hourly rate is derived from one of the following sources: • Rate model, if it is populated on the operational resource plan. • Labor rate card, if rate model is not available. • System property *com.snc.time_card.default_rate* if all the other conditions fail.
Actual cost	Amount of actual hours multiplied by the hourly rate of the specified resource. **Note:** When you submit a time card, upon approval of the time card, actual cost is updated for an allocation record of an operational resource plan.
Notes	Additional correspondence and information.

Related Links

Field	Description
Copy Resource Plan	Copies the opened resource plan to create a new resource plan.

Related Lists

Field	Description
Requested Allocations	List of requested allocations for the resource plan. The number of requested allocation records created depends on the value in the **Allocations type** field. For example, if a resource is requested from Jan first to Mar. 31st, the following requested allocation records are created for each type:

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Related Lists (continued)

Field	Description
	• Monthly: 3 allocation records, one for each month. • Weekly: 14 allocation records, one for each week with Monday being the first day of the week. • Plan Duration: Only 1 record for the entire planned duration of the resource plan.
Resource Allocations	List of resources allocated to the plan.

Extend resource plan form

Use the Extend resource plan fields to extent a resource plan for a project.

Extend resource plan fields

Field	Description
New end date	Date until which you want to extend the resource plan.
Request type	Type of request. Options include: FTE, Person Days, or Hours.
FTE or Person Days or Hours	Number of units to request resources. The field appears when you select one of the options in the **Request type** field. Based on the selected request type, specify the unit. For more information, see Request type.

Request Extension form

Use the Request Extension form to request extension of an allocated resource plan.

Request Extension form

Field	Description
Extend until	Date until which you want to extend the resource plan and request for resources.
Request type	Type of request. Options include: FTE, Person Days, or Hours.
FTE or Person days or Hours	Number of units to request resources. The field appears when you select one of the options in the **Request type** field. Based on the selected request type, specify the unit. For more information, see Request type.
Notes	Other correspondence and information about the resource plan that the project manager wants to communicate with the resource manager.

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Requested Allocation form

Use Requested Allocation form to create a request for resource plans in Planning or Rejected state.

Requested Allocation form

Field	Description
Start date	Start date for the requested allocation record.
End date	End date for the requested allocation record.
FTE	Number of units for the full-time equivalent selection for the requested allocation record. If a resource is requested as FTE, then the planned hours for each requested allocation record are calculated first. A total of all hours is then rolled up as planned hours on the resource plan. See Resource plans for an explanation of FTEs. **Note:** Capacity isn't derived from FTE, but from schedules. Both FTE and schedules must be in synchronization with each other.
Resource plan	Resource plan number to which the requested allocation record is attached. This field automatically populates if the requested allocation record is accessed from a resource plan.
Planned hours	Number of hours to allocate to the requested allocation record. By default, the Resource Plan form on the resource plan form are proportionally distributed among all the requested allocations based on the number of working days for each requested allocation record. However, it's possible to override the planned hours or the FTE.
Planned cost	Estimated cost of resource. `Planned cost = Planned hours * hourly rate` The hourly rate is derived from one of the following sources: • **Resource rate** from the resource plan, if the **Rate override** option is selected. • Rate model, if it's populated on the project or demand to which the resource plan is associated. • Labor rate card for user resource plans. • Role rate when resource is requested by resource role, if the role has a rate. • Group hourly rate if role doesn't have a rate or if the role is null. • System property *com.snc.time_card.default_rate* if all the other conditions fail. Planned costs roll up to the **Planned cost** field on the resource plan.
Planned cost in project currency	Planned cost of a project task in project currency when the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin is activated and the Project Currency view is enabled.

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Requested Allocation form (continued)

Field	Description
Planned cost in demand currency	Planned cost of a demand task in demand currency when the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin is activated and Demand Currency view is enabled.

Resource Role form

Use the Resource Role form to create roles for project team members.

Resource Role form

Field	Description
Name	Name of the resource role. **Note:** The resource role name must be unique. Do not create duplicate roles.
Hourly rate	Hourly rate for the resource role used for calculating the task cost based on time worked.
Description	Detailed description of the resource role.

Resource Allocation form

Use the Resource Allocation form to resource allocations.

Resource Allocation form

Field	Description
Start date	Start date for the resource allocation. The start and end dates must fall within the dates of the resource plan.
End date	End date for the resource allocation.
Resource	Resource to be allocated. The lookup results are filtered by the group, role, or user selected on the resource plan.
Confirmed/ Allocated hours	Number of hours that the system confirms or allocates to the resource when the resource plan is confirmed or allocated. Confirmed and allocated hours roll up to the **Confirmed/Allocated hours** field on the resource plan.
FTE	Number of units for the full-time equivalent selection. This option appears if you selected **FTE** for the **Request type** field on the resource plan.
Person Days	Number of units for the person days selection.

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Resource Allocation form (continued)

Field	Description
	This option appears if you selected **Person Days** for the **Request type** field on the resource plan.
Planned cost	Planned cost of the resource. `Planned Cost = Planned hours * hourly rate`The hourly rate is derived from one of the following sources: • **Resource rate** from the resource plan, if the **Rate override** option is selected. • Rate model, if it is populated on the project or demand to which the resource plan is associated. • Labor rate card, if rate model is not available. • System property *com.snc.time_card.default_rate* if all the other conditions fail. Planned costs roll up to the **Planned cost** field on the resource plan. The field is not visible on the form by default. Configure the form to add this field if it is not visible.
Confirmed/ Allocated cost	Cost of the resource. `Confirmed/Allocated Cost = Confirmed/Allocated hours * hourly rate` The hourly rate is derived from one of the following sources: • **Resource rate** from the resource plan, if the **Rate override** option is selected. • Rate model, if it is populated on the project or demand to which the resource plan is associated. • Labor rate card, if rate model is not available. • System property *com.snc.time_card.default_rate* if all the other conditions fail. Confirmed and allocated costs roll up to the **Confirmed/Allocated cost** field on the resource plan. The field is not visible on the form by default. Configure the form to add this field if it is not visible.
Confirmed/ Allocated cost in demand currency	Confirmed/Allocated cost of a demand task in demand currency when the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin is activated and Demand Currency view is enabled.
Confirmed/ Allocated cost in project currency	Confirmed/Allocated cost of a project task in project currency when the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin is activated and Project Currency view is enabled.

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Create New form

Use the Create New form to create allocation boards.

Create new form

Field	Description
Name	Unique name for the allocation board.
Type	Level from which you want to filter resources. • **Demands/Projects**: When selected, resources are filtered from demands and projects. • **Group**: When selected, resources are filtered from a group. • **Group manager**: When selected, all resources with pps_resource role are filtered. • **Portfolio**: When selected, resources are filtered from a portfolio. • **Program**: When selected, resources are filtered from a program. • **Resource Plan**: When selected, resources are filtered through the filter criteria and are not bound to any particular group, role, manager, portfolio, or program. • **Role**: When selected, resources are filtered from a role. • **User manager**: When selected, all resources with pps_resource role are filtered. Depending on the value in **Type** field, a field appears to select the name of the record. For example, if **Type** is **Group**, a field **Group** appears where you can select the name of the group.

Resource Event form

Use the Resource Event form to update resource even which is part of resource plan.

Resource Event form

Field	Description
Name	The name of the event.
Type	The type of event: • **Time off** • **Appointment** • **Meeting**

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Resource Event form (continued)

Field	Description
	• **Phone call** • **Task**
When/To	The start and end date of event.
All day	If the event is an all-day event as specified by the schedule.
Repeats	If the event repeats **Daily**, **Weekly**, **Monthly**, or **Does not repeat**.
Task	The task associated with this event.
User	The user associated with the event.

Resource Reports form

Use the Resource Reports form to generate the resource reports.

Resource Reports form

Field	Description
Report Type	The type of report that you want to view. You can select from the following options: • **Availability** - view the availability of an entity for selected time period. • **Forecasted Utilization** - view the forecast utilization of an entity for selected time period. • **Committed Utilization** - view the confirmed utilization of an entity for selected time period. • **Allocation** - view allocations for selected time period. • **Allocation Details** - view the allocation details of the entity for selected time period.
Entity Type	The entity that you want to view the report for. You can select from the following options: • **User** • **Group** • **Demand** • **Project** • **Program** • **Portfolio** • **Other Task**

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Resource Reports form (continued)

Field	Description
	Note: If you select **Allocation** in the **Report Type** field, only **User** and **Group** are available.
User	The user that you want to view the report for. This field is displayed only if you select **User** in the **Entity Type** field.
Group	The group that you want to view the report for. This field is displayed only if you select **Group** in the **Entity Type** field.
Group by	The option to filter the report for the selected group by **Roles** or **Members**. This field is displayed only if you select **Availability** or **Forecasted Utilization** or **Committed Utilization** in the **Report Type** field, and **Group** in the **Entity Type** field.
Members	The group member from the selected group that you want to view the report for. This field is displayed only if you select **Group** in the **Entity Type** field and **Members** in the **Group by** field.
Role	The resource role from the selected group that you want to view the report for. This field is displayed only if you select **Group** in the **Entity Type** field and **Roles** in the **Group by** field.
Demand	The demand that you want to view the report for. This field is displayed only if you select **Demand** in the **Entity Type** field.
Project	The project that you want to view the report for. This field is displayed only if you select **Project** in the **Entity Type** field.
Program	The program that you want to view the report for. This field is displayed only if you select **Program** in the **Entity Type** field.
Portfolio	The portfolio that you want to view the report for. This field is displayed only if you select **Portfolio** in the **Entity Type** field.
Other Task	The task (other than a demand, project, program, or portfolio) that you want to view the report for. This field is displayed only if you select **Other Task** in the **Entity Type** field.
Resource Plan	The resource plan that you want to view the report for. This field is not displayed if you select **User** or **Group** in the **Entity Type** field.

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Resource Reports form (continued)

Field	Description
Start Date and End Date	The start and end dates time frame to view the report.
Zoom level	The zoom level that you want to view the report for. You can select from the following options: • **Weekly**: Displays data for each week during the selected time period. • **Monthly**: Displays data for each month during the selected time period.
Report Unit	The unit in which capacity, availability, or allocation of a resource is displayed. • Hours: Displays the capacity, availability, or allocation of a resource in hours. • FTE: Displays the capacity, availability, or allocation of a resource in FTE. • Person days: Displays the capacity, availability, or allocation of a resource in person days. This field is displayed only when the **Report Type** field value is **Availability**, **Allocations**, or **Allocation Details**.

New event form

use the New event form to add tasks, events, and appointments to your calendar.

New event form

Field	Description
Name	Enter a descriptive name for the event.
Type	Select a type from list. • **Time off:** Personal time off. • **Appointment:** A type of administrative task. • **Meeting:** A work-related meeting. • **Phone call:** A work-related phone call. • **Task work:** A task in the ServiceNow system, such as an incident or a change that you're assigned to.
Task	Select the reference lookup icon and select the task that needs to be done.

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New event form (continued)

Field	Description
	This field appears only if you selected *Task* as the type of activity. **Note:** This action does not add you to the **Assigned to** field on the task form.
When	Choose the start and end date and time, or select the *All day* option. **Important:** When you select *All day* for a **Time off** event, the system allocates 24 hours for that day, not the standard 8-hour work schedule. To book time off for only your working hours (for example, 8 hours), specify the exact start and end times instead of selecting *All day*. The allocated hours for an event are calculated based on the duration between the start and end times you specify. To align time off with your work schedule, see Resource schedules. Do not use this field to set repeatable events.
Repeats	Select the frequency that the activity repeats, such as **Daily**, **Weekly**, **Monthly**, or select **Does not repeat**if this event is a non-repeating event. For example, if you have a task that you want to work on Monday and Friday, set a weekly repeatable event for Monday and Friday. See Create repeatable events.
Repeat every	Enter a number that represents the frequency. This field appears only if you selected *Daily*, *Monthly*, or *Yearly* in the **Repeats** field.
Repeat on	Select the days of the week to repeat the activity. This field appears only if you selected *Weekly* in the **Repeats** field.
Repeat until	Select an end date.

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New event form (continued)

Field	Description
	This field appears only if you select *Daily*, *Monthly*, or *Yearly* in the **Repeats** field.

Diagnostics Feature form

Use the diagnostics Feature form to create a new diagnostic feature for a resource.

Diagnostics Feature form

Field	Description
Name	Name of the diagnostic feature. This name appears in the application to which this diagnostic feature belongs.
Active	Option for activating the diagnostic feature.
Application	Search for and select the application with which you want to associate this diagnostic feature.
Roles	Move desired roles to the Selected list. The users with the selected roles can access the diagnostic feature.
Description	Details of the diagnostic feature. The description is displayed in the application to which the diagnostic feature belongs. It enables the user to understand the diagnostic scans executed in the feature.

Diagnostics Inputs form

Use the Diagnostics Inputs form fields to specify a filter condition for a user.

Diagnostics Input fields

Field	Description
Label	Name of the label for the input fields.
Field Type	Select **Reference** field type.
Table	Name of the table on which the query specified in the condition should run.
Key	An identifier for the user input condition. If a user specifies multiple conditions, this key acts as a unique identifier for each condition. You can use this key as the input for the `scanContext` section of the diagnostic script.

Diagnostics Scripts form

Use the Diagnostic Scripts form to scan the data in your application for any corruption.

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Diagnostics Scripts form fields

Field	Description
Name	Name of the diagnostic script. Use a name that clearly explains the objective of the script. The script name also enables you to identify the correct script while mapping the script to a feature when creating a diagnostic scan.
Description	Details of the diagnostic script. The description enables the user to understand the functions of the script.
Diagnostic script	The actual code for the diagnostic script.

Diagnostics form

Use the Diagnostic form to create a diagnostics scan and map diagnostic feature with diagnostic and fix scripts.

Diagnostics form fields

Field	Description
Name	Name of the diagnostic scan. This name appears in the application to which this diagnostic scan belongs.
Active	Option for activating the diagnostic scan.
Order	The order in which this diagnostic scan appears in the application.
Feature	Search for and select the diagnostic feature with which you want to associate this diagnostic scan.
Roles	Move desired roles to the Selected list. The users with the selected roles can access the diagnostic scan.
Description	Details of the diagnostic scan. The description is displayed in the application to which the diagnostic scan belongs. It enables the user to understand the diagnostic scans.

Portfolio Management

With the ServiceNow® Portfolio Management application, you can create portfolios which are collections of related programs, projects, and demands. You can then perform financial planning and monitor the status and progress of these portfolios.

Watch this four-minute video to learn about the portfolio structure, creating a portfolio and program, setting up a stakeholder registry. Information about the portfolio structure, creating a portfolio and program, setting up a stakeholder registry, and the portfolio workbench.

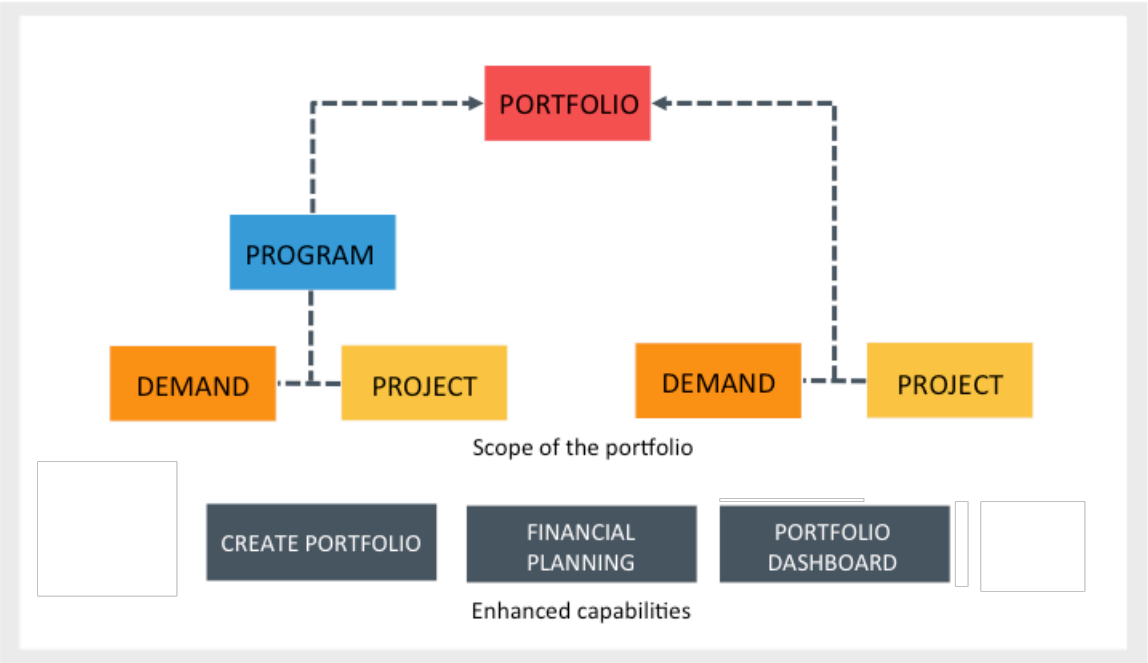
You must have the it_portfolio_manager role to manage a portfolio. The Portfolio Management application provides these capabilities to the portfolio manager:

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- Create a portfolio by adding related programs, projects, and demands.
- Perform annual portfolio planning by selecting demands, projects, and programs.
- Track the progress and status of all the programs, projects, and demands that are part of the portfolio. You can track the costs, resources, schedules, risks, and issues.

The following diagram provides an overview of Portfolio Management.

Overview of Portfolio Management



Scenario-based Portfolio Planning

Install the Scenario Planning for PPM application from ServiceNow Store to help the portfolio managers do a scenario-based portfolio planning with different combinations of demands and projects. You can Compare multiple scenarios in a portfolio and fund only those demands and projects that add financial value to the organization.

Create a portfolio

Create a portfolio to manage related programs, projects, and demands.

Before you begin

- Create demands, programs, and projects to include as part of the portfolio.
- Role required: it_portfolio_manager or admin

Procedure

1. Navigate to **All** > **Project** > **Portfolios** > **Create New**.
2. Enter a unique **Name** that summarizes the programs, projects, and demands included in this portfolio.
3. Enter a **Description** for the portfolio that adequately explains the various programs, projects, and demands attached to it.
4. Enter the name of the **Portfolio Manager**.
5. Select **Create Portfolio**.

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Result
The portfolio is created and the form reopens with additional fields, related links, and related lists.

What to do next
Fill in the following related links and lists to complete the portfolio:

Portfolio form Related links

Field	Description
Demand Workbench	Link to open Demand Workbench.
Portfolio Target	Link to open the Portfolio Target dialog box for you to enter the CAPEX and OPEX target for each fiscal year. This target amount is split equally among the fiscal periods. The portfolio target is included in the Portfolio Target related list.
Portfolio Planning	Link to open Portfolio Planning Workbench for scenario planning. This related link is available when Scenario Planning for PPM is installed in your instance. For more information, see Scenario Planning for PPM.
Analytics Portfolio	Link to open the PMO Dashboard. The dashboard generates graphical reports for the portfolio.

Portfolio form Related lists

Field	Description
Demands	List of demands that are part of the portfolio. To create a demand, select **New**. To add existing demands to the portfolio, select **Edit**.
Projects	List of projects that are part of the portfolio. To add existing projects to the portfolio, select **Edit**.
Programs	List of programs that are part of the portfolio. To create a program, select **New**. To add existing programs to the portfolio, select **Edit**.
Risks	List of risks that are part of the portfolio. The program, project, and demand risks are also displayed in this list. To create a risk, select **New**.
Issues	List of issues that are part of the portfolio. The portfolio, program, project, and demand issues are also included in this list. To create an issue, select **New**.

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Portfolio form Related lists (continued)

Field	Description
Cost Plans	List of cost plans of projects and demands that are part of the portfolio.
Monetary Benefit Plans	List of monetary benefit plans of projects and demands that are part of the portfolio. To create a monetary benefit plan, open the project or demand record and select **New** in the Monetary Benefit Plans related list.
Non-monetary Benefit Plans	List of non-monetary benefit plans of projects and demands that are part of the portfolio. To create a non-monetary benefit plan, open the project or demand record and select **New** in the Non-monetary Benefit Plans related list.
Portfolio Target	List of portfolio capital and operational expense target for different fiscal years. The values are displayed from the project_funding table. Set these values in the Portfolio Target window on the portfolio form. You can create targets for different financial periods. **Note:** The PPS admin can also set the portfolio target by navigating to **Project Administration** > **Enter Portfolio Target**.
Planning & Budgeting	According to the fiscal years, lists projects and demands that are part of the portfolio. You can include or exclude a project or demand from the portfolio budget plan.

Open a portfolio status list

Open the status list of a portfolio to see the projects that are included in it.

Before you begin

Role required: it_portfolio_manager

Procedure

1. Navigate to **Project** > **Portfolios** > **All**.
2. Open a portfolio.
3. Select the **Portfolio Status** related link.
   The list of portfolio status records opens.
4. If necessary, you can select a different project associated with the current portfolio.

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Scenario Planning for PPM

The Scenario Planning for PPM application provides a central location for portfolio managers to create and track the roadmap for project execution for a given fiscal year. Optimize your budget and resource usage by creating and comparing different scenarios for your project and demand roadmap or resources.

A scenario is a collection of demands and projects that serves as a planning instance for the selected fiscal year to support funding decisions.

Eligible demands and projects in the portfolio are collected into a default or existing scenario of the planning cycle. You use the default or existing scenario as a basis to create additional scenarios. A demand or project can belong to more than one scenario in the current planning cycle but it cannot belong to more than one portfolio. For more information, see Create planning scenarios.

Features

The Scenario Planning for PPM provides the following capabilities to portfolio managers:

- Plan your portfolio based on resource capacity for a single year or multiple years.
- Break down your multiple year portfolio planning in smaller planning windows for continuous tracking and planning adjustment.
- Allocate budget to demands and projects in your portfolio from Investment Funding.
- Create scenario-based plans for portfolios.
- Apply filters to refine your list of selected demands and projects in your portfolio.
- Experiment with different combinations of demands and projects in planning scenarios.
- View details of demands and projects that are not aligned with your strategic goals.
- Edit the way demands and projects are funded for each scenario.
- Compare different scenarios to assess outcomes of various project and demand combinations.
- Confirm a planning scenario that best aligns with your organizational objectives as your current portfolio plan.
- Override a previously confirmed planning scenario based on changing priorities and environment.
- View budget details such as actual and planned costs, projects, and demands not aligned to goals and strategies, and actual costs for the projects.
- View resource utilization and allocation.
- View demands and projects with over-allocated resources.

Install Scenario Planning for PPM

Install the Scenario Planning for PPM application from ServiceNow Store applications. Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Before you begin

Complete the following setup checklist for a smooth installation and configuration.

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Setup checklist

Setup tasks	Description
Verify that the PPM Standard plugin (com.snc.financial_planning_pmo) is activated.	Navigate to **Subscription Management** > **Subscriptions** in your instance. The list displays the subscriptions that your organization has purchased.
Verify that the Investment Funding for PPM (com.snc.investment_planning_pmo) plugin is activated. **Note:** This plugin needs to be activated only when you want to retrieve the target amount for a portfolio for annual type of planning from Investment Funding.	Navigate to **Subscription Management** > **Subscriptions** in your instance. The list displays the subscriptions that your organization has purchased.

Role required: admin

About this task

Activate the PPM Standard plugin (com.snc.financial_planning_pmo) in your ServiceNow instance before you install Scenario Planning for PPM. For more information see, Activate PPM Standard (Project Portfolio Management).

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the application using the filter criteria and search bar.
   You can search for the application by its name (Scenario Planning for PPM) or ID (sn_pw_scenario). If you cannot find an application, you may have to request it from ServiceNow store.

   Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. Click **Install**.
4. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed. If there are any plugins or applications that need to be installed, you must install them before you can install Scenario Planning for PPM.
5. **Optional:** If demo data is available and you want to install it, click **Load demo data**.

   (Optional) Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

   Important: If you don't load the demo data during installation, it's unavailable to load later.
6. Click **Install**.

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Related topics

List of plugins (Xanadu)

Components installed with Scenario Planning for PPM

Several types of components are installed with the installation of the Scenario Planning for PPM application, including tables and demo data.

Note:
The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Tables installed with Scenario Planning for PPM

Table	Description
Portfolio Scenario [sn_pw_scenario_pm_portfolio_scenario]	Stores portfolio planning scenario information such as name of the scenario, state of the scenario, fiscal year, and name of the portfolio to which the scenario belongs.
Portfolio Scenario Funding [sn_pw_scenario_pm_portfolio_scenario_funding]	Stores the funding information about the portfolio planning scenarios. The funding information includes the name of the scenario, operating budget, capital budget, total budget, and whether a demand or project is selected for execution.
Scenario Planning Configuration [sn_pw_scenario_pm_portfolio_scenario_configuration]	Stores the portfolio planning configuration information such as planning type and scope.
Portfolio Planning Window [sn_pw_scenario_pm_planning_window]	Stores the planning window information of a portfolio for multi-year and resource capacity-based planning.

Annual and multi-year resource capacity-based planning

Plan your portfolios using scenarios for a single fiscal year or multiple years after analyzing utilization of resources against available capacity. Include demands and projects in all portfolios or a single portfolio to evaluate, prioritize, and select demands and projects that match your business objectives.

Plan your portfolio and select demands and projects that you want to execute within the target budget. Create scenarios to analyze your portfolio's alignment with the organization's business objectives. The Scenario Planning for PPM application enables you to evaluate multiple sets of forecast scenarios and analyze investments consistently.

Annual financial and resource capacity-based planning

Plan your portfolio for a single fiscal year. You can select all your portfolios or a single portfolio for planning. After selecting your portfolio, you can create multiple scenarios to evaluate the demands and projects based on total cost, resource usage and capacity, and strategic objectives.

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In the annual planning, you create scenarios with different combinations of demands and projects from a specific portfolio or all portfolios for a specific financial year. Based on your selection of demands and projects, analyze the resource allocation for the selected demands and projects derived from the associated resource plans. After analyzing the resource availability and capacity, modify your selection of demands and projects in different scenarios and confirm a scenario that maximizes your returns and add financial value to the organization.

Important:
The default configuration is **Annual Financial and Resource Capacity Based Planning** and **single selected portfolio** for new installation or upgrade. You can change the planning configuration to plan for multiple years and all portfolios.

Investment funding integration

Integrate Scenario Planning for PPM with Investment Funding to retrieve the target amount for a portfolio or all portfolios from a top-level investment fund for annual financial and resource capacity-based planning. If you are planning for a single portfolio, the target amount of that portfolio is retrieved from the **New Fund** column for that portfolio investment and fiscal period in a top-level investment. If you are planning for all portfolios, you can configure the funding entity for which the organization must be funded, and then the investment planner can add funds for that particular entity in a top-level investment. For example, if your organization is a business unit, you can enable that business unit as the funding entity, and all the funds allocated to that business unit are set as the target for your organization.

Note:
When you upgrade Scenario Planning for PPM to 2.3.0 or later version, the legacy Investment Funding must be upgraded to ServiceNow Store for the integration to work. For detailed instructions on upgrading from legacy Investment Funding to the ServiceNow Store application, see Upgrading legacy Investment Funding to Store application.

Multi-year, resource capacity-based planning

Multi-year planning enables you to plan your portfolio using a planning window ranging from three to 24 months. If your portfolio consists of demands and projects spanning more than one year or if you are planning for a longer duration, you can plan your portfolio in smaller planning windows. The multi-year planning enables you to analyze resource usage for different demands and projects during the selected planning window and adjust your priorities to accommodate any changes to budget, resources, or business environment.

In the multi-year planning, you create scenarios similar to the annual planning, but for a specified planning window for a specific portfolio or all portfolios. Based on your selection of demands and projects, analyze the resource allocation for the selected planning window. After analyzing the resource availability and capacity, modify your selection of demands and projects in different scenarios and confirm a scenario that maximizes your returns and add financial value to the organization.

Configure the scenario planning type and scope

Configure the scenario planning type and select the scope of portfolios to determine the way you want to plan and work on your portfolios. You can also specify using Investment Funding for funding demands and projects in your portfolios.

Before you begin

Important:
Modifying the planning type and scope deletes all your existing scenarios and confirmed plans.

Role required: it_pps_admin

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About this task

The option to use Investment Funding for funding your portfolios is available only when you activate the Investment Funding plugin.

Procedure

1. Navigate to **All** > **Project** > **Portfolios** > **Configure Planning**.
2. Open the scenario planning configuration record.
3. Configure the planning type and scope.
4. **Optional:** If you want to enable selection of demands and projects that are in completed or inactive state, select **Allow Selection of Completed Projects**.
5. **Optional:** If you want to retrieve the target amount from Investment Funding, select **Investment Funding Integration**.

   Note:
   This option is available only when the Investment Funding for PPM (com.snc.investment_planning_pmo) plugin is active and planning type is selected as **Annual Financial and Resource Capacity Based Planning**.

   - If the planning scope is **Single Selected Portfolio**, the target amount of that portfolio is retrieved from the **New Fund** column for the selected portfolio investment. For more information, see Allocate funds to an investment.
   - If the planning scope is **All Portfolios**, specify a source to retrieve the target amount.
     a. Select a funding entity from the Funding Entity list from which your demands and projects will be funded.
     b. Select the transaction table for the selected funding entity from the Funding Record list.
6. Click **Update**.

Result

The scenario planning configuration is updated and all scenario plans and confirmed plans are deleted. The configuration changes also updates the Portfolio Planning Workbench to enable you to do scenario planning based on the updated planning type and scope.

Impact of modifying the scenario planning type and scope

Modifying the planning type and scope impacts the demands and project selection in your planning scenarios and portfolio planning. You can change the planning type and scope at any time during portfolio planning.

Changing the planning type

Changing the planning type affects your portfolio planning regardless of whether the portfolio has any confirmed plan or planning scenarios in it at the time of this change.

From annual financial planning to multi-year, resource capacity based planning

This change in the planning type has the following impact on your confirmed plans and planning scenarios:

- Deletes all scenarios and scenario funding records.
- A default scenario is created with the current month as starting month and a default of 3-month planning window.

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From multi-year, resource capacity based planning to annual financial planning

This change in the planning type has the following impact on your confirmed plans and planning scenarios:

- Deletes all scenarios and scenario funding records.
- If you were previously using annual planning, the target budget is retrieved. If not, the current fiscal year is set as default and you must set the target budget.

Changing the planning window

Changing the planning window effects all the users involved in planning and has the following impact on your portfolio planning:

- The new planning window applies to all scenarios and the confirmed plan of every portfolio.
- A demand or project outside of the selected planning window cannot be selected or deselected. However, the value of **Planned** check box for the project or demand will not change. These demands and projects continue to be related to the scenario.
- When you confirm a scenario, only the demands and projects that fall in the planning window are confirmed, the demands and projects outside the planning window are not confirmed.

Changing the planning scope

Changing the planning scope from a single selected portfolio to all portfolios has the following impact on your confirmed plans and planning scenarios:

- In case of annual planning, creates a portfolio planning record in the Tracking state if a confirmed plan exists for any of the portfolios.
- In case of annual planning, creates a confirmed plan for all the fiscal years with at least one confirmed plan for any of the portfolios.
- In case of multi-year planning, your confirmed plans for the portfolios are retained.
- Deletes all existing scenarios and scenario funding records.

Set target budget for a fiscal year

When planning for a portfolio or all portfolios, start by selecting the fiscal period for the demands and projects that you want to work with. You then set the target amounts for both operating and capital expenses of portfolios when Scenario Planning is not integrated with Investment Funding.

Before you begin

Role required: it_portfolio_manager or it_pps_admin

About this task

Internal groups typically provide the target amount for a fiscal year. The target for the planned fiscal year can be 110% of the amount spent in the last year based on actual expenditure. The target is the starting point for planning projects for the next fiscal year.

Note:
The PPS admin can set the portfolio target by navigating to **Project Administration** > **Enter Portfolio Target**.

If Scenario Planning is integrated with Investment Funding, the target amount is retrieved from the top investment fund allocated for a single portfolio or all portfolios.

For information on how to configure the investment funding settings for a single portfolio or all portfolios, see Configure the scenario planning type and scope.

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For information on creating a top level investment and allocating funds, see the Create a top-level investment topic.

Procedure

1. Navigate to Portfolio Planning Workbench from either of two starting points.

2. In the Portfolio Planning Workbench **Fiscal Year** choice list, select the year that you want to perform the planning for.
   You can perform financial planning for only one fiscal period at a time.
3. Set or update the target budget amount.
   - If you're planning for the selected fiscal year for the first time, select **Set Target**.
   - If you have already set the target budget amount for the selected fiscal year and you want to change the amount, select **Edit Target**.
4. In the Set Target dialog box, enter the amounts for **Capex Target** and **Opex Target**.
5. Select **Save**.

Result
The portfolio capital and operational expense target for different fiscal years are updated in the **Portfolio Target** related list on the portfolio record.

What to do next
Start creating scenarios for portfolio planning. For more information, see Create planning scenarios.

Create planning scenarios

Create planning scenarios with different combinations of projects and demands in your portfolio. Experiment with different scenarios to plan your budget expenditure for a fiscal year.

Before you begin
Ensure that you have set the target budget for the fiscal year for which you want to create a planning scenario for annual type of planning. For more information, see Set target budget for a fiscal year. Setting of target is not required for multi-year resource capacity type of planning.

Role required: it_portfolio_manager

About this task
You can create up to four planning scenarios with different combinations of projects and demands for execution. For example, you might create a scenario A and select all the projects and demands with your standard resource allocation. If you're aware that a risk might affect the business outcome, you can create a scenario B with a reduced number of projects and demands to see whether that strategy might mitigate or avoid the risk. For more information about defining scenarios, see Scenario Planning for PPM.

Procedure

1. Navigate to the Portfolio Planning Workbench from either of two starting points.

2. In the Planning Portfolio Workbench, create a scenario for annual financial and resource capacity based planning or multi-year resource capacity based planning.
   - For annual planning, perform the following steps:

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a. Select the fiscal year for which you want to create a planning scenario.

b. Click the **Start Planning** button on the Welcome page.
A default planning scenario is created with all active demands and projects for the selected fiscal year.

> **Note:**
> If a portfolio plan exists for the selected fiscal year, the Portfolio Planning Workbench displays it as the current plan.

c. Click the create scenario icon (+).

d. In the Create Scenario dialog box, enter a name and short description for the scenario.

e. In the Copy Data From list, select the source for copying data.

The available options are:

- **None**: Creates a scenario with no projects or demands selected.
- **Ongoing projects funded last year**: Creates a scenario using projects funded during the previous year and continuing in the current year selected. This option is available only if an existing approved plan for the previous year exists. This is the default option when you create an initial scenario for a given fiscal year.
- **A list of other scenarios**: Creates a scenario using projects and demands selected from another existing scenario. This option is available if other scenarios exist for the same portfolio for the same fiscal year.
- **Confirmed Plan**: Creates a scenario with projects and demands selected from the existing approved plan. This option is available only if a confirmed plan exists for the current fiscal year.

f. Click **Save**.

- For multi-year planning, a default plan is automatically created with the current month as the starting month, and the planning window period as configured in the Scenario Planning Configuration page. To create a new scenario, perform the following steps:

a. Click the create scenario icon (+).

b. In the Create Scenario dialog box, enter a name and short description for the scenario.

c. In the Copy Data From list, select the source for copying data.

The available options are:

- **None**: Creates a scenario with no projects or demands selected.
- **Ongoing projects funded last year**: Creates a scenario using projects funded during the previous year and continuing in the current year selected. This option is available only if an existing approved plan for the previous year exists. This is the default option when you create an initial scenario for a given fiscal year.

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- **A list of other scenarios**: Creates a scenario using projects and demands selected from another existing scenario. This option is available if other scenarios exist for the same portfolio for the same fiscal year.
- **Confirmed Plan**: Creates a scenario with projects and demands selected from the existing approved plan. This option is available only if a confirmed plan exists for the current fiscal year.

d. Click **Save**.

Result
The planning scenario is created and displayed in a new tab.

What to do next
Select projects and demands for execution in the planning scenario.

Select demands and projects for portfolio planning

After you create a planning scenario, select the demands and projects to include in budget planning. You can view all the demands and projects for the selected fiscal year or planning window with their planned cost and priorities to finalize them for execution.

Before you begin
You should have at least one planning scenario. For more information, see Create planning scenarios.

Role required: it_portfolio_manager

About this task
You can perform a what-if analysis by including or excluding demands or projects and their planned cost for annual type of planning. The planned cost is derived from all the cost plans created for a project or demand. It is the total of all the costs from all cost plans for a given project or demand in the fiscal year or planning window.

You can perform a what-if analysis by including or excluding demands or projects and their planned cost, budget, and utilization for multi-year resource capacity type of planning.

Procedure
1. Navigate to Portfolio Planning Workbench from either of two starting points.

2. In the Portfolio Planning Workbench, click the scenario for which you want to include or exclude demands and projects.
   The projects and demands from the selected portfolio appear on the **Timeline View**.
3. **Optional:** Compare and evaluate the relative standing of demands using the **Bubble Chart** tab.

   (Optional) Right-click a demand and select **Select for execution** from the context menu to include a demand in portfolio planning. For more information, see Demand workbench bubble chart. You can search for specific demands by applying filters using the Filter( ) icon.

   Note:
   The **Bubble Chart** tab is not available for Multi-year Resource Capacity Based Planning configuration.

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4. Include or exclude demands and projects from planning in the **Timeline View** tab by selecting or clearing the check boxes next to each project or demand.
   You can search for specific demands and projects in the timeline by applying filters using the Filter( ) icon.
   The number of selected project and demands is updated in the **Selected Items** section of the **Overview** tab.
5. **Optional:** Review the external dependencies between the selected projects in your portfolio. For more information, see Review external dependencies between projects.
6. Review the information in the Overview section on the right, and the **Resources** tab to evaluate and adjust your selection of the demands and projects to be included in the plan.
   Review the following sections in the **Overview** tab:
   - Total budget versus the targets that you entered in the **Set Target** stage in the **Budget vs. Target** section for annual type planning. If the total budget is more than the target cost, an exception icon ( ) is shown with the total planned cost.
   - Total planned cost for all the projects and demands for multi-year type planning in the **Total Planned Cost** section.
   - Potential benefit amount that would accrue on execution of the selected demands and projects in the **Benefit Amount** section.

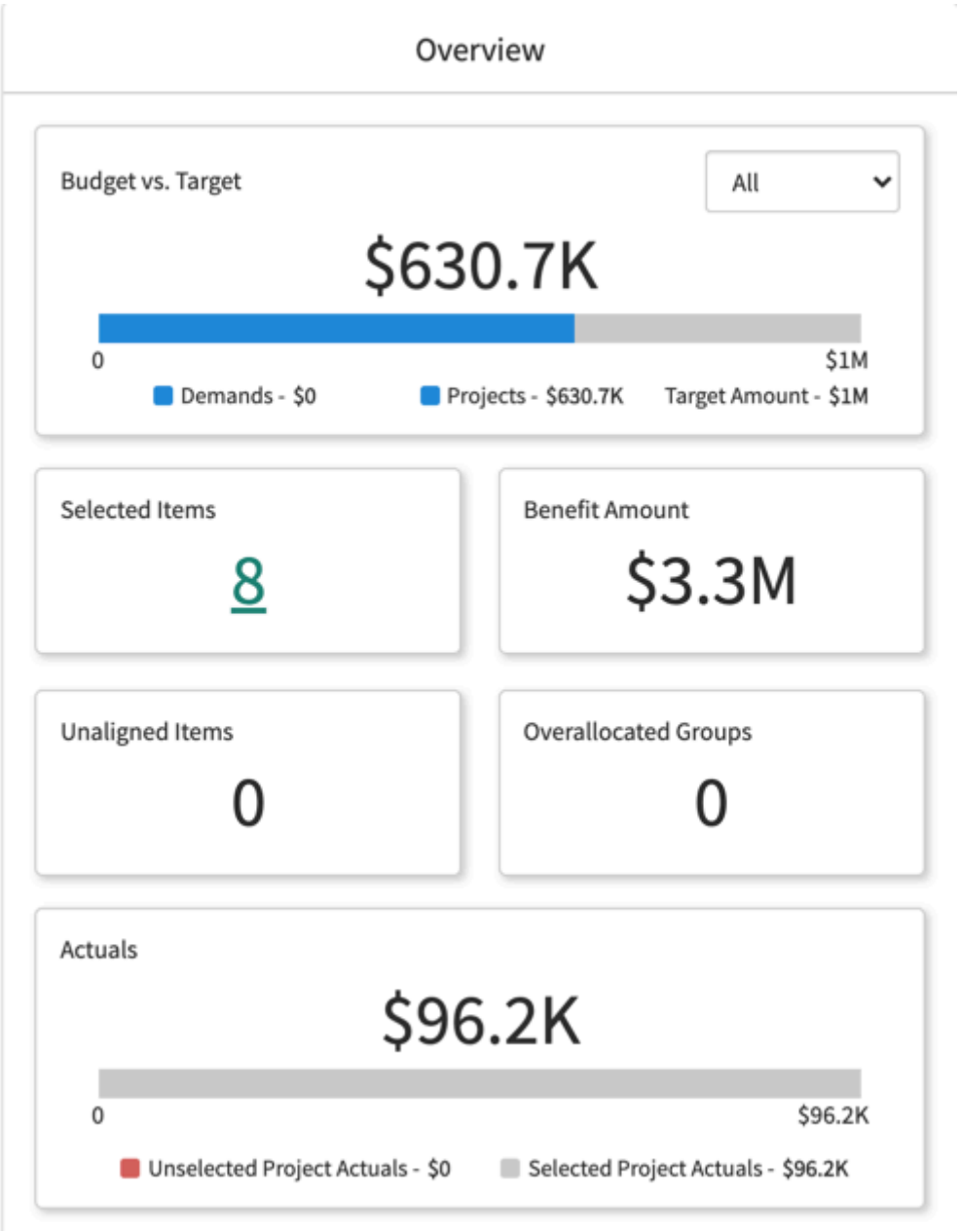
     Note:
     For multi-year resource capacity type planning, the total value of planned cost and benefit for the entire duration of the projects or demands is displayed irrespective of the selected planning window.

   - Strategic alignment of your portfolio by viewing the number of demands and projects that are not associated with any organizational strategy or goal in the **Unaligned** section.
   - Number of assignment groups where, for any quarter of the selected fiscal year, the number of requested hours is greater than the total hours capacity in the **Overallocated Groups** section.
   - Review how much in actuals have been spent on the projects selected for execution and the rest of the projects in your portfolio in the **Actuals** section.

     Note:
     For multi-year resource capacity type planning, the actuals value is displayed in the widget without the selected and unselected project actual legends.

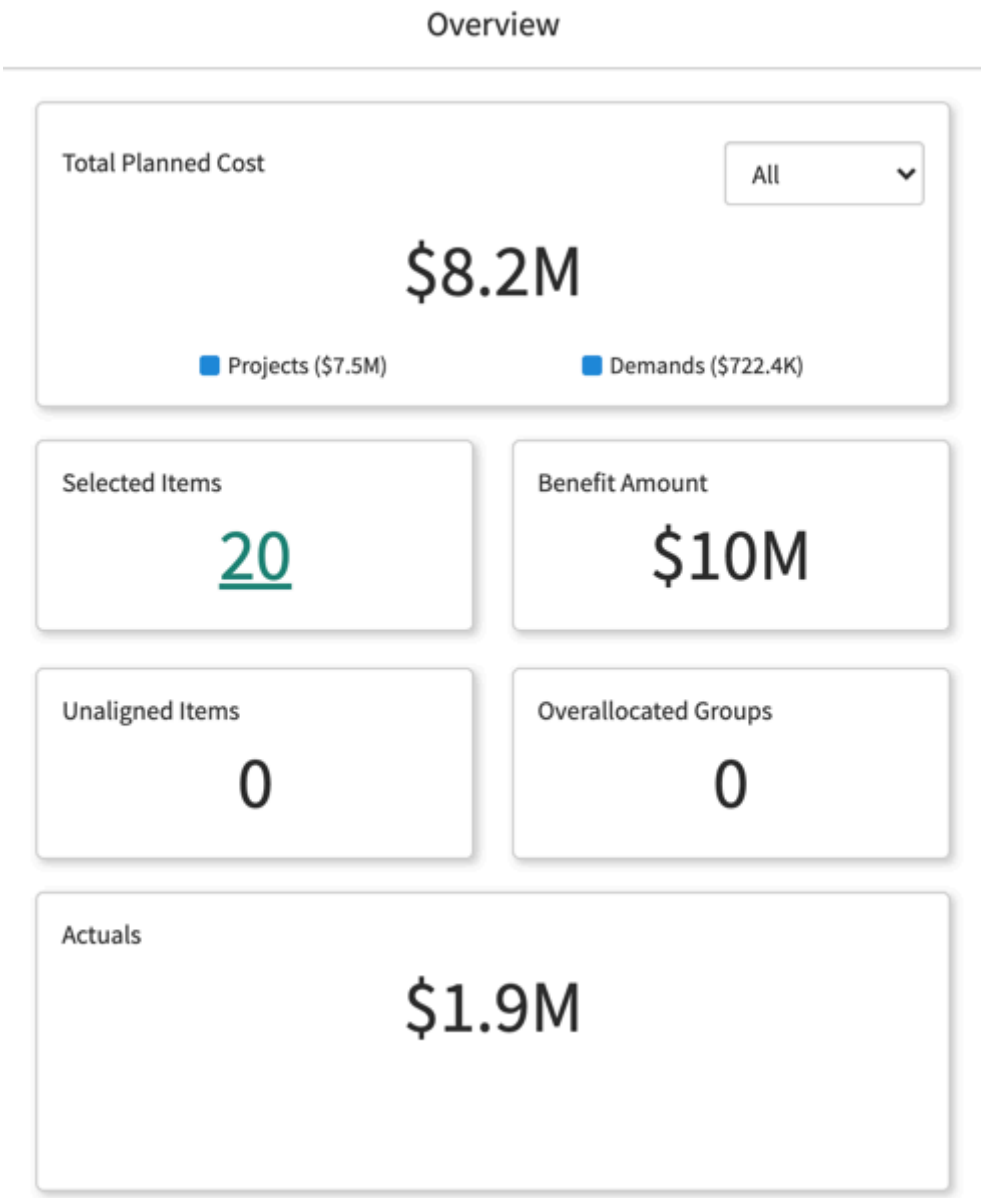
   The following image shows an example of how the portfolio information is displayed in the Overview section for annual type planning.

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The following image shows an example of how the portfolio information is displayed in the Overview section for multi-year type planning.

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Review the following sections of the **Resources** tab:

View percentage of utilization for all the resources requested by the selected demands and projects of the portfolio in a heat map. You can view the percentage utilization of all resource groups or overallocated resource groups in months or quarters.

Tip:
Click any cell in the heat map to view the project or demand associated with the selected resource group.

The following image shows an example of how the resource information is displayed in the heat map.

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Tip:
To bring the planned cost within the target budget and the resource utilization within 100%, consider deselecting a few low-priority demands or projects. Deselected demands and projects could then be moved over to a different fiscal period

7. **Optional:** Review the capex and opex budget for individual projects and demands directly using **Capex Budget** and **Opex Budget** columns and revise it if necessary.

Note:
Click the Show or hide columns ( ) in the **Timeline View** tab and add the **Capex Budget** and **Opex Budget** columns if these columns are not visible.

8. **Optional:** Update the name and short description by clicking the edit icon ( ) and making the modifications.
9. **Optional:** Delete the scenario by clicking the delete icon ( ).
10. **Optional:** Convert the selected scenario to become the current plan by clicking **Confirm**.
11. **Optional:** Create more planning scenarios to compare them.
12. **Optional:** Manually refresh the cost and resource widgets after a demand or a project is selected or cleared for execution by clicking the Refresh icon ( ).

What to do next
Compare planning scenarios to analyze different combinations of projects and demands and select a scenario that best aligns with your organizational goals. For more information, see Compare planning scenarios.

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Review external dependencies between projects

Review the external dependencies between projects in a portfolio to track projects that are dependant on each other more closely.

Before you begin

Role required: it_portfolio_manager
Open demands and projects in the timeline view of the Portfolio Planning Workbench.

About this task

As a portfolio manager, you may want to know the projects which are dependent on each other so that these projects can be tracked more closely.
For example, project B is dependent on project A (external soft dependency) and you want to make sure that project A is executed on time so that the schedule of project B is not affected. The **Dependencies** column shows that there is an outgoing external dependency from project A and an incoming external dependency to project B. You can the use the incoming dependency to determine whether a delay in project A will affect project B.

Procedure

1. Click the show or hide columns in gantt icon ( ) in the timeline view and add the **Dependencies** column if it is not visible.
   The number of incoming and outgoing external dependencies are displayed, if any.
2. Click the external dependency in **Dependencies** column for the project.
3. In the **Dependencies** pop-up dialog, click a tab to review the dependency:

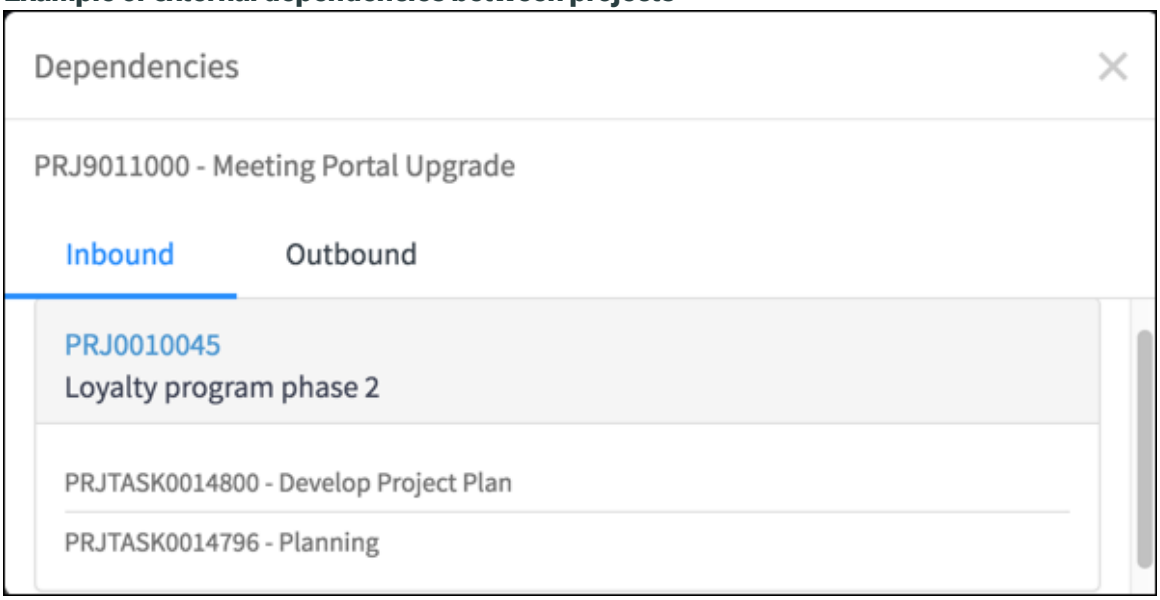
   Inbound tab

   Tasks that have an incoming dependency from a project are listed.

   Outbound tab

   Tasks with an outgoing dependency to the project are listed.

   #### Example of external dependencies between projects

4. Click the project number in a tab to open and review the linked project in the planning console view.

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Rank demands and projects

Rank demands and projects to prioritize demands and projects for their approval and execution within a portfolio.

Before you begin

Role required: it_portfolio_manager

About this task

By default, the Rank By Score list ranks demands and projects based on system-generated scores. Rank of a demand or project is specific to a fiscal year. A project can be ranked as third in FY17 but ranked sixth in FY18.

Procedure

1. Navigate to Portfolio Planning Workbench from either of two starting points.

2. Optional: Adjust the rank automatically or manually.

Example:

The following table explains manual adjustment of ranks.

Scenario for edit rank	Rank update	Rank before manual edit	Rank after manual edit
If initial rank is 0 or blank and other ranks are present, then after edit, the successive ranks get incremented by 1.	• Initial rank: 0 • Edited rank: 2	• **Task_1: 0** • Task_2: 1 • Task_3: 2 • Task_4: 3	• Task_2: 1 • **Task_1: 2** • Task_3: 3 • Task_4: 4
If initial rank > edited rank, then after edit, the successive ranks get incremented by 1.	• Initial rank: 4 • Edited rank: 1	• Task_1: 1 • Task_2: 2 • Task_3: 3 • **Task_4: 4**	• **Task_4: 1** • Task_1: 2 • Task_2: 3 • Task_3: 4
If initial rank < edited rank and there is no gap in rank sequence, then after edit, the previous ranks get decremented by 1.	• Initial rank: 1 • Edited rank: 3	• **Task_1: 1** • Task_2: 2 • Task_3: 3 • Task_4: 4	• Task_2: 1 • Task_3: 2 • **Task_1: 3** • Task_4: 4
If initial rank < edited rank and there is a gap in rank sequence, then after edit, the successive ranks get incremented by 1.	• Initial rank: 1 • Edited rank: 4	• **Task_1: 1** • Task_2: 2 • Task_3: 4 • Task_4: 5	• Task_2: 2 • **Task_1: 4** • Task_3: 5 • Task_4: 6

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Compare planning scenarios

Compare various planning scenarios with your current or default plan to assess different combinations of projects and demands in your portfolio for execution. You can perform a what-if analysis and determine the planning scenario that optimally achieves the target budget and uses your resources.

Before you begin

Ensure that you have created up to four planning scenarios and selected projects and demands for execution. For more information, see Create planning scenarios and Select demands and projects for portfolio planning.

Role required: it_portfolio_manager

Procedure

1. Navigate to Portfolio Planning Workbench from either of two starting points.

2. In the **Plan** tab of the Portfolio Planning Workbench, click **Compare Scenarios**.
   The Compare Scenarios page displays all the planning scenarios.
3. Compare different aspects of the scenarios such as costs, number of projects and demands, benefit amount, and actuals for the selected projects and demands.
4. Compare the variance between the scenarios for costs, number of projects and demands, benefit amount, actuals for the selected projects and demands, and so on.
   The variance value for different fields is displayed in red or green color. For example, if the planned cost of a scenario is greater than the planned cost of the confirmed plan, the planned cost variance is displayed in red. Or if the benefit amount of a scenario is greater than the benefit amount of the confirmed plan, the benefit amount variance is displayed in green.

What to do next

Confirm a scenario that best aligns with your organizational objectives, optimally achieves your target budget, and uses your resources. For more information see, Confirm a planning scenario.

Confirm a planning scenario

Select and confirm a scenario to allocate budget and resources for executing the selected demands and projects in a fiscal year.

Before you begin

Ensure that you have created up to four planning scenarios and selected projects and demands for execution. For more information, see Create planning scenarios and Select demands and projects for portfolio planning.

Role required: it_portfolio_manager

Procedure

1. Navigate to Portfolio Planning Workbench from either of two starting points.

2. In the Project Planning Workbench, confirm a scenario as your current plan for the fiscal year using one of the following options:
   - Select a scenario and click **Confirm**.
   - Click **Compare Scenarios** and, in the Compare Scenarios page, click **Confirm Scenario**.
   - If you are overriding an already confirmed plan , click **Override**.

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3. In the Confirm dialog box, set additional options to be performed on the selected demands and projects after the planning scenario is saved.

   Note:
   When a confirmed plan exists, the name of the dialog box is Override Selection rather than Confirm.

   - If the project property **Create project(s) on confirming demands from portfolio workbench** is set to false, you can choose to approve all the selected demands after the save by selecting **Approve all selected demands (if not approved already)**.
   - If the project property **Create project(s) on confirming demands from portfolio workbench** is set to true, you can choose to convert the selected demands to projects after the save by selecting **Convert all the selected demands to projects**.
   - Confirm the resources for selected demands and projects by selecting **Confirm resources for selected demands or projects**.
   - If the confirmed and allocated resource plans associated with the demands and projects that are newly unselected do not have any actual hours associated with them, then select **Unconfirm the resources for the unselected demands and projects (only those resources where there is no actual hours/cost captured will be unconfirmed)** to change the state of such resource plans to requested. If the confirmed and allocated resource plans have actuals associated with them, a notification is send to the project or demand managers specifying that they need to manually release such resources.
   - Delete all the unconfirmed working scenarios after confirmation of the selected scenario by selecting **Delete all working scenarios**. This option is selected by default.

4. Click **Save**.

Result
Budget is allocated to selected demands and projects. The remaining demands and projects are removed from execution. However, resources already confirmed for the unselected demands and projects are not removed automatically.

Track the progress of a portfolio

After confirming a scenario to complete planning of your portfolio, track the progress of the portfolio. You can also monitor the status of cost, resource, schedule, and scope for the selected fiscal period or planning window for the portfolio.

Before you begin
Role required: it_portfolio_manager

Procedure

1. Navigate to Portfolio Planning Workbench from either of two starting points.

2. In the Portfolio Planning Workbench, click the **Track** tab.
   The status of projects and demands is displayed in the **Timeline View** tab with a Gantt chart over time and a **KPIs** tab.

3. Track the progress of your portfolio by reviewing the status of key parameters in the **Timeline View** tab.

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- Details such as planned and actual costs, variance, planned and end dates, and priorities for the selected demands and projects.
- Identify the projects that are dependent on each other by viewing external dependencies between projects in a portfolio. For more information, see Review external dependencies between projects.
- Track the current status of an individual project by viewing the latest project status report by selecting the **Status Report** option.
- Track the progress of project tasks in an individual project in your portfolio using the **Planning Console** option. This option is available in the context menu for a project.

4. Check status information such as the overall health, schedule, cost, resources, and scope of all selected projects in the portfolio in the **Project KPIs** tab.
   The most recent status report created for a project populates this information. Point to a status indicator to view comments entered by the project manager for that KPI.

   Note:
   A grey X icon ( ) next to any project KPI indicates that the project manager has not entered any comments for that aspect in the status report.

5. Review cost and resource-related information in the **Cost (Budget vs. Actual)** and **Resource (Allocated vs. Actual)** charts.
   - View the comparison of actual costs from all selected projects in the portfolio with the planned cost shown in the **Cost (Budget vs. Actual)** chart. The actual cost for projects is derived from the expense lines.

     Note:
     The **Cost (Budget vs. Actual)** graph is not available for multi-year type planning.

   - You can view only Capex or Opex or both by selecting the respective option from the list.
   - Check how the allocated resources are being used by viewing the comparison of actual resource time spent on all project tasks with the resource hours allocated to execute the selected projects and demands in the portfolio shown in the **Resource (Allocated vs. Actual)** chart. The actual time spent is taken from processed time cards for the projects.
6. Track the risks, issues, decisions, actions, and the project change requests across all selected projects in the portfolio by going to the **Risks**, **Issues**, **Decisions**, **Actions**, and **Changes** tabs.

Portfolio Dashboard

Portfolio Dashboard provides a central location to a portfolio manager to generate different graphical reports of the portfolios.

From Madrid release onward, the portfolio manager dashboard has been deprecated and replaced with the PMO dashboard. Use the PMO dashboard to gain insights about your portfolios. For more information, see PMO Dashboard.

Access the Portfolio Dashboard

View different graphical reports on the PMO Dashboard.

Before you begin
Role required: it_portfolio_manager

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Procedure

Navigate to **Project** > **Portfolios** > **Portfolio Dashboard**.
The PMO Dashboard is displayed.

Program Management

A program helps you to logically group related projects or demands under a single entity. The ServiceNow® Program Management application helps you to manage related projects and demands in coordinated way which is not possible when projects and demands are managed independently.

The it_program_manager role is essential to be able to manage programs. The Program Management application provides the following capabilities to the program manager:

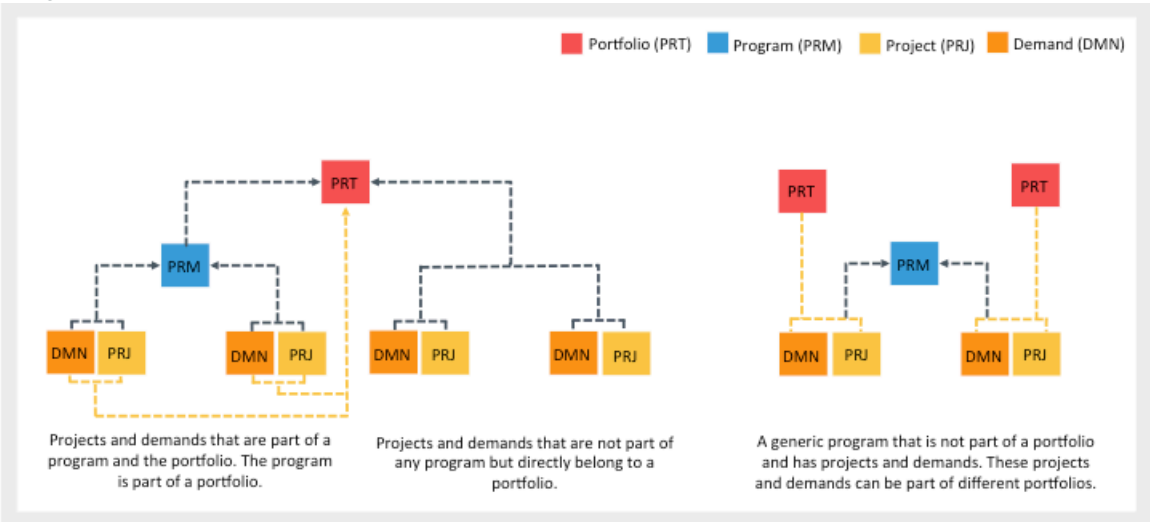
- Create a program by adding related projects and demands.
- Create tasks specific to the program. These tasks are essential for completion of the program but are outside the scope of projects.
- Define key milestones, anticipated risks, and issues for the program.
- Monitor the progress and status and of all the projects and demand that are part of the program. Program manager can track the costs, resources, and schedules.

When you create a program, consider:

- A program can be part of a portfolio or can be a generic standalone program that is not part of any portfolio.
- A program cannot be part of multiple portfolios.
- A project or demand cannot be part of multiple programs.
- You can have projects and demands that can directly be part of a portfolio and not part of a program.

The following diagram illustrates how you can implement programs.

Program implementation



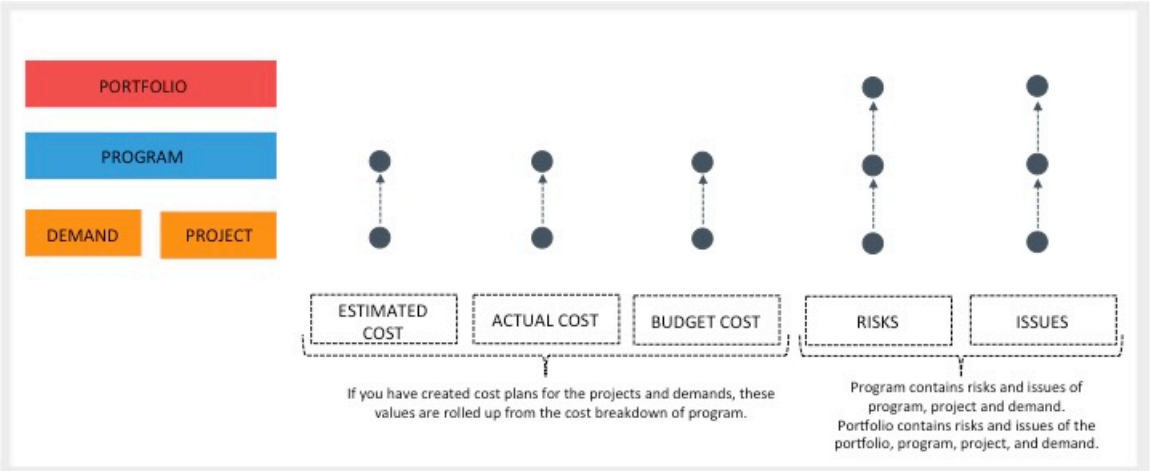
Basics of Program Management

When you create a program, you can add multiple projects or demands to it. If you have created cost plans for the projects and demands, certain values are rolled up from the cost breakdown

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of program. At the same time, the risk and issues of the projects and demands are also included with the program. The following diagram illustrates how information in the program is related to the projects and demands that are part of the program.

Information population in program



Project workbench provides graphical charts to view and monitor the progress of the program and the projects and demands that are part of it. You can also view the progress of a program, projects, and demands against a timeline with the details of milestones and key milestones.

The project manager dashboard provides a central location to a program manager to generate different graphical reports of programs and the program financials.

Creating programs: approval and business case workflow

Programs in ServiceNow® follow a different creation pattern than projects:

Why programs don't typically come from demands

- Demand workflow: demand → approval → convert to project
- Program workflow: strategic initiative → executive approval → create program directly
- Programs are strategic multi-project containers decided at executive/portfolio level, not operational demands. They represent multi-year transformations such as digital transformation and cloud migration, rather than single deliverables.

Recommended program approval workflow

1. Strategic planning phase: Create Initiative planning item in Strategic Planning for the strategic program
2. Business case development: Attach business case document to Initiative; define scope, budget ($1M+), timeline (2-5 years)
3. Executive approval: Present Initiative with business case to steering committee or executive sponsor for approval
4. Program creation: After approval, create Program record in PPM with reference to approved Initiative
5. Project breakdown: Create constituent projects under the program (these can come from demands)

Alternative: Demand-based program creation (if needed)

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If your organization requires formal demand intake for programs:

1. Create Demand with **Category** as Program Request.
2. Attach program business case to Demand.
3. Route through demand approval workflow.
4. After approval, manually create Program (no automatic conversion like demand→project).
5. Link Program to source Demand via reference field.

Program vs Project decision criteria:

- Use Program when: Multi-project initiative, $1M+ budget, 2+ year duration, cross-organizational scope
- Use Project when: Single deliverable

Create a program to manage projects and demands

Create a program to manage related projects and demands. Define the duration, estimated cost, benefits, and ROI to the organization.

Before you begin

Role required: it_program_manager

Procedure

1. Navigate to **All** > **Project** > **Programs** > **Create New**.
2. On the Program form, fill in the fields.

Program form

Field	Description
Program Name	Name of the program.
Program manager	Program manager assigned to the program.
Number	System-generated number with a configurable prefix.
Portfolio	Portfolio to which the program belongs. If you do not select a portfolio for the program, the program becomes a global program. You can associate the projects and demands in a global program with any portfolio.
Priority	Priority associated with the program.
Status	Status of the program. This information rolls up from the status of all the projects that are part of this program.
State	Current state of the program. Default states: **Pending**, **Open**, **Work in Progress**, **Closed Complete**, **Closed Incomplete**, **Closed Skipped**.

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Field	Description
	Note: Set the state of the program to Closed manually. The program state does not roll up to a Closed state when program tasks, projects, and demands move to Closed state.
Phase	Current phase of the program such as Initiating, Planning, and Executing.
Business Unit	The business unit to which this program belongs.
Investment Type	Investment type of the program. The default available options are **Cost Reduction**, **End User Experience**, **Legal and Regulatory**, **Revenue Generating**, **Service Sustaining**, and **Strategic Enabler**.
Impacted Business Units	Business units of the organization that this program affects.
Strategies	Strategic objectives of the organization that the program fulfills. A program can fulfill multiple strategic objectives. **Note:** Leave this field empty if the program does not fulfill any strategic objective.
Goals	Goals associated to the selected strategy. A program can fulfill multiple goals. If you do not select a strategy, then the Goals list displays all goals in the system. **Note:** Leave this field empty if there are no goals associated with the program.
Description	Detailed description of the program.

Dates section of the Program form

Field	Description
Planned start date	Intended program start date. If the start date of associated program tasks, projects, and demands is earlier than the program start date, the start date is adjusted to an earlier date. Removal of a demand or project from the program does not affect the planned start date of the program.
Planned end date	Intended program end date. The end date extends based on the end date of the program tasks, projects, and demands. Removal of a demand or project from the program does not impact the planned start date of the program.

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Field	Description
	You can adjust the program end date manually, based on the start and end date of the associated program tasks, projects, or demands. **Note:** If a demand with end date later than the program end date is added, the Planned end date field becomes read only.
Planned duration	Expected duration of this program. The planned duration changes based on the changes in planned start or end date of the program.
Actual start date	Date on which the program actually starts.
Actual end date	Date on which the program actually ends.
Actual duration	Actual duration of the program from program start to program closure.

Financials section of the Program form

Field	Description
Total planned cost	Estimated cost of the program. If there is operational expenditure and capital expenditure associated to the program, then planned cost is sum of operational expenditure and capital expenditure, which is in functional currency.
Planned capital	Capital expenditure (Capex) for the program. If there are no cost plans associated to the program, the **Capital expense** field is editable. Select a currency type and enter a value.
Planned operating	Operational expenditure (Opex) for the program. If there are no cost plans associated to the program, the **Operational expense** field is editable. Select a currency type and enter a value.
Budget cost	Budgeted cost for this program.
Actual cost	Actual cost of the program. The value rolls up from the cost plan breakdowns from projects and demands in the program.
Planned benefit	Planned benefit value for the program. This value rolls up from the benefit plan breakdowns of the program.

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Field	Description
	You can also enter the value manually. Select a currency from the Currency Type list and enter a value.
Planned returns	Planned returns is based on the difference between planned benefit and planned cost.
Planned ROI%	The result is derived from the values in the **Planned return** and **Planned cost** fields. The formula is: planned return / planned cost x 100.
Score	The program score is based on the individual scores of the following attributes: **risk score**, **value score**, and **size score**, which in turn are calculated based on risk, planning ROI%, and estimated cost attributes (on a program) respectively. **Note:** You can configure the formula for score calculation.
Risk	Risk associated with the program.

3. Click **Submit**.

What to do next

Use the following related links and lists:

Program form related links

Field	Description
PMO Dashboard	Access the PMO dashboard to view comprehensive reports of the projects and demands in the program.
Program Budget	Allows you to allocate the budget to the program.
Program Workbench	Access the Program workbench to view details of the projects, demands, and program tasks associated with the program.
Status Report	View the most recent program status report or create a new program status report.

Program form related lists

Field	Description
Program Tasks	View the list of all associated program tasks.

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Program form related lists (continued)

Field	Description
	To create a new program task, click the **New** button. For more information, see Create a program task.
Projects	View the list of projects included in the program. To create a new project, click **New**. For more information, see Define a project. To add existing project to the program, click **Edit**. If you want to create parent-child relationships between projects to establish project hierarchies select the parent project in the **Parent** field. This organizes large initiatives into manageable subprojects while maintaining consolidated visibility. The subproject now rolls up to the parent project. Progress, costs, and timelines contribute to parent project metrics. **Tip:** Use project hierarchies when large initiatives require multiple work streams. Parent project = program-level view; subprojects = tactical execution.
Demands	View the list of demands included in the program. To create a new demand, click **New**. For more information, see Create a demand. To add existing demand to the program, click **Edit**.
Risks	View the list of risks associated with the projects and demands of the program or the program itself. To create a new risk, click **New**.
Issues	View the list of issues associated with the projects and demands of the program or the program itself. To create a new issue, click **New**.
Cost plans	View the list of all cost plans for projects and demands that are part of the program.

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Program form related lists (continued)

Field	Description
Benefit Plans	View the list of all benefit plans for projects and demands that are part of the program.
Program Budget	View the program budget according to fiscal years. Click the amounts in the list to revise them.
Program Status Reports	View the list of status reports for the program. To generate a new status report, click **New**. For more information, see Create a program status report.

Create a program task

You can create program tasks from the Program form related lists.

Before you begin

Role required: it_program_manager

About this task

Procedure

1. Navigate to **Project** > **Programs** > **All**.
2. Select the program from the list.
3. In the Program Tasks related list, click **New**.
4. Fill out the form fields (see table).
   There are a few fields that are populated after the task is created.
5. Click **Submit**.

Result

The new task appears in the **Program Task** related list on the Program form.

Program Task form

Field	Description
Short description	[Required] A brief description of the program task.
Number	A system generated number with a configurable prefix.
State	The current state of the program. The states include: *Pending*, *Open*, *Work in Progress*, *Closed Complete*, *Closed Incomplete*, *Closed Skipped*.
Planned start date	The estimated date and time for the program task to start.
Planned end date	The estimated date and time for the program task to end.
Planned duration	The estimated length of time (from start time to end time) of the program task.

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Program Task form (continued)

Field	Description
Assigned to	The user assigned to the program task.
Milestone	A milestone is a program task with a duration of zero (0). Use milestones to mark key dates in your program, such as key decision points or approvals.
Key milestone	You can define a milestone as a key milestone to track the program progress. For example, you can create key milestone for completion of deliverables such as a program plan. A key milestone is visible on the program timeline.
Description	A detailed description of the program task.
Additional comments (Customer visible)	Enter information that you want the users to see.
Work notes	Enter work notes about the milestones, impediments, or changes as the program progresses. **Note:** Users with the business stakeholder role for PPM can view this field. For more information, see Business stakeholder role for PPM.

Fields populated and updated after the task is created

Field	Description
Actual start date	The date that this program started. This date is populated after you update the program state to *Work in Progress*.
Actual end date	The date that this program ended. This date is populated after you update the program state to *Closed Complete*.
Actual duration	The actual duration of the program from program start to program closure. As with planned duration, the actual duration shows total program time.

Allocate budget to a program

Set the budget of a program according to the fiscal years.

Before you begin

Role required: it_portfolio_manager

Procedure

1. Open the program form.
2. In the related links, click **Program Budget**.
   The **Program Budget** dialog box opens.
3. Select the year for which you want to set the budget for the program.
4. Enter the amounts for **Capex Budget** and **Opex Budget**.
   The **Total Budget** is updated with the sum of capex and opex amounts.
5. Click **OK**.

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Result
The program budget for the selected year appears in the **Program Budget** related list. You can click the amounts in the list to revise them.

Create a program status report

Create a program status report periodically to view a status rollup of the projects in the program. When you create a status report, the status for different aspects of the program is rolled up from the project status reports of all projects.

Before you begin
Ensure that the **Show on Program Status Report** option in the Project form for all the projects that you want to include in the status report is selected.

Role required: it_program_manager

Procedure
1. Navigate to **Project** > **Programs** > **All**.
2. In the program list, open a program record.
3. In the **Program Status Reports** related list, click **New**.
4. On the form, fill in the fields.

Note:

Changing the status for any aspect in the Program Status Report form also updates the corresponding fields in the Program form.

Program Status Report form

Field	Description
Program	Name of the program.
Status Date	Date until which you want to generate the status report. Default value is the current date.
Number	System-generated ID number for the status report with a configurable prefix.

Read-only fields rolled up from the Program form

Field	Description
State	Current state of the program such as Pending, Open, or Work in Progress.
Percent complete	Percentage of the program completed.
Planned start date	Planned start date of the program.
Planned end date	Planned end date of the program.
Actual start date	Actual start date of the program.
Actual end date	Actual end date of the program.
Planned cost	Estimated cost of the program.
Actual cost	Actual cost of the program.

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Overall Status section of the Program Status Report form

Field	Description
Overall health	Overall health of the program rolled up from the latest status report of each project in the program. The status is indicated using red, green, and yellow colors as the default.
Executive Summary	Brief summary and analysis of the program.
Comments	Comments about the overall status.
Last Week's Achievements	Description of key tasks completed or any significant progress in the program in the last week.
Key Activities planned	Next planned activities for the program.

Schedule section of the Program Status Report form

Field	Description
Schedule	Status of the program schedule rolled up from the latest project status report of each project in the program. The status is indicated using red, green, and yellow colors by default.
Comments on Schedule	Information related to the program schedule.

Cost section of the Program Status Report form

Field	Description
Cost	Status of the program cost rolled-up from the latest project status report of each project in the program. The status is indicated using red, green, and yellow colors by default.
Comments on cost	Information related to the program cost.

Resources section of the Program Status Report form

Field	Description
Resources	Status of resources rolled-up from the latest project status report of each project in the program. The status is indicated using red, green, and yellow colors by default.
Comments on Resources	Additional information related to program resources.

Scope section of the Program Status Report form

Field	Description
Scope	Status of the program scope rolled up from the latest project status report of each project

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Field	Description
	in the program. The status is indicated using red, green, and yellow colors by default.
Comments on Scope	Information related to the program scope.

5. **Optional:** Select a different status color to override the rolled-up color for various aspects of the program or select **None** if you do not want the status of an aspect to appear in the program status report.

   (Optional) Selecting **None** displays a grey X icon ( ) for that program aspect on the program status report.

   The override color that you set is not retained from one report to next. When the next program status report is generated, it takes the color from the associated projects.

6. Select **Submit**.

View program status reports

Program status reports provide the up-to-date at-a-glance progress of all the projects in the program in several categories.

Before you begin

Role required: it_program_manager

About this task

Use the **Program Status Report** related list to view the program status reports created for the program. If no report is listed, create a program status report.

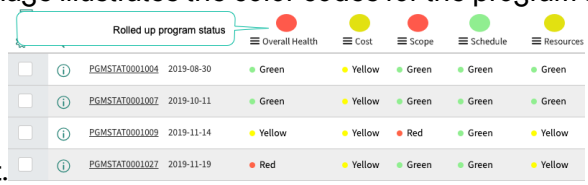
Procedure

1. Navigate to **Project** > **Programs** > **All**.
2. In the program list, open a program record.
3. Select the **Status Reports** related link.
4. Select a status report from the top-left corner of the page to view its contents.
5. Review the program status in the report.

Program status report

Section	Description
Overview	Provides general overview information about the program: ○ **Program Name**: Name of the program. ○ **Program Manager**: The program manager. ○ **Portfolio**: The portfolio to which the program belongs. ○ **Business Unit**: The business unit to which the program belongs. ○ **Investment Type**: Investment type of the program. ○ **Impacted BU**: Business units of the organization that this program affects. ○ **State**: Current state of the program. ○ **Phase**: Current phase of the program, for example, Initiating, Planning, and Executing.

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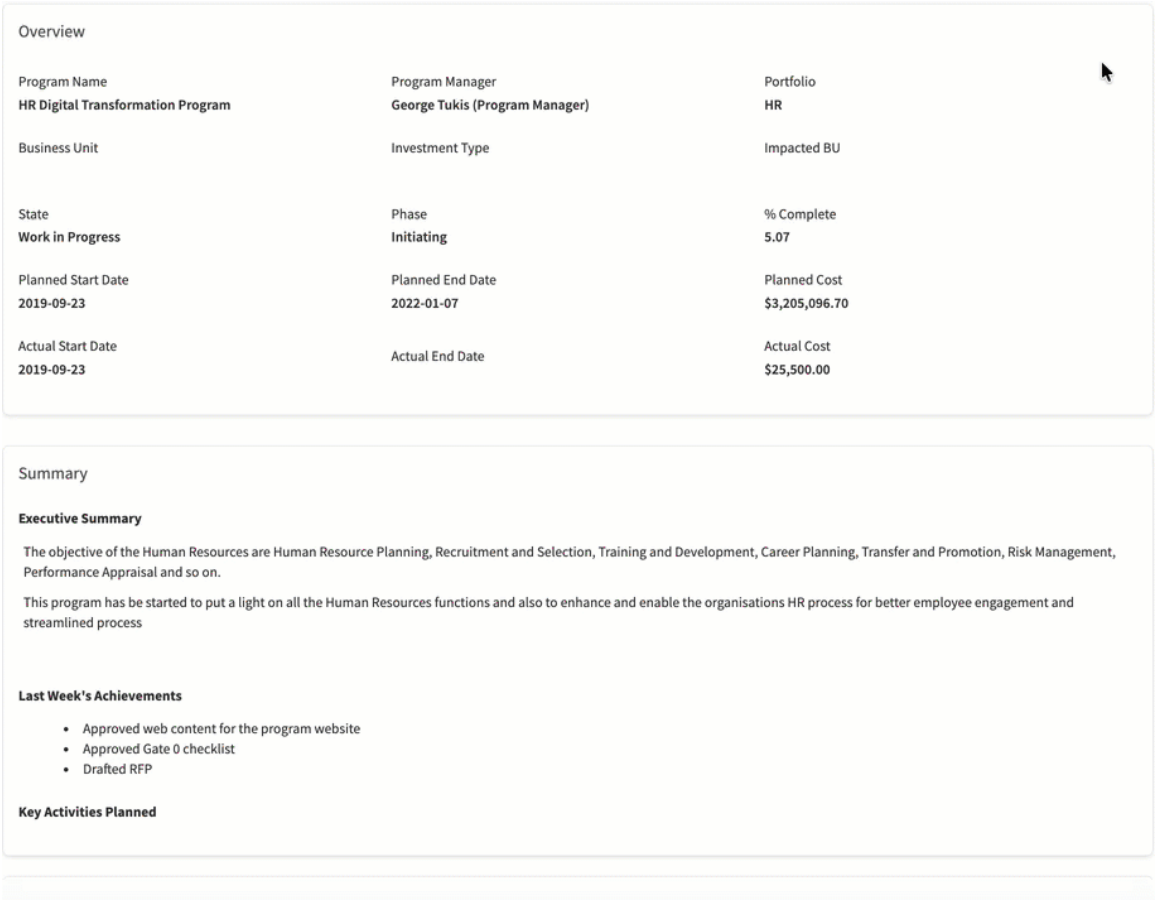
Section	Description
	○ **% Complete**: Percentage of the program completed. ○ **Planned Start Date**: Planned start date of the program. ○ **Planned End Date**: Planned end date of the program. ○ **Planned Cost**: Estimated cost of the program. ○ **Actual Start Date**: Actual start date of the program. ○ **Actual End Date**: Actual end date of the program. ○ **Actual Cost**: Actual cost of the program. This information rolls up from the Program form.
Summary	Information about the overall health of the program from the most recent status entered by the program manager for the project. ○ **Executive Summary**: Brief summary and analysis of the program. ○ **Last Week's Achievements**: Progress of the program in the previous week. ○ **Key Activities Planned**: Next planned activities for the program.
Current Status	Status of program related to overall health, schedule, cost, resources, and scope that is rolled up from the latest project status reports of all projects in the program. If there are multiple project status reports for each of these projects, the values from the latest project status report of each project are aggregated and rolled up to the program status. For more information, see Program Status Report form. Different colors indicate the status of above aspects. The rolled-up color for the final status is in the order red, yellow, and green by default. If there are projects in red, yellow, and green, then the program status is red. If there are projects only in yellow and green, then the program status is yellow. The following image illustrates the color codes for the program status rolled up from the project.  **Note:** A grey X icon (⊗) for any program aspect means that the program manager has excluded that aspect from the status report.
Project KPI	Status of the Key Performance Indicators for overall health, schedule, cost, resources, and scope for each project in the program. Only projects for which the **Show on Program Status Report** option in the project form is selected are listed. The value of these KPIs roll up and are shown in the Current Status section of the program status report.

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Section	Description
	Note: A grey X icon ( ) next to any project KPI means that the project manager has excluded that aspect from the status report.

6. **Optional:** If you need a printed copy of the report, select the print icon ( ) in the header of **Status Report** tab.

Example: Program status report



Overview

Program Name **HR Digital Transformation Program**	Program Manager **George Tukis (Program Manager)**	Portfolio **HR**
Business Unit	Investment Type	Impacted BU
State **Work in Progress**	Phase **Initiating**	% Complete **5.07**
Planned Start Date **2019-09-23**	Planned End Date **2022-01-07**	Planned Cost **$3,205,096.70**
Actual Start Date **2019-09-23**	Actual End Date	Actual Cost **$25,500.00**

Summary

Executive Summary

The objective of the Human Resources are Human Resource Planning, Recruitment and Selection, Training and Development, Career Planning, Transfer and Promotion, Risk Management, Performance Appraisal and so on.

This program has be started to put a light on all the Human Resources functions and also to enhance and enable the organisations HR process for better employee engagement and streamlined process

Last Week's Achievements

- Approved web content for the program website
- Approved Gate 0 checklist
- Drafted RFP

Key Activities Planned

Program workbench

The program workbench is a central location for viewing details of a program and the projects and demands that are part of the program.

The program manager role can use the program workbench to view and monitor the progress of the program and the projects and demands. Program workbench provides information for only tracking the program.

You can track the progress of demands and projects, and monitor the status of cost, resource, schedule, and scope for the selected fiscal period for the program.

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Note:

- Program workbench is based on Service Portal which means that you can configure, customize, and extend it as per your requirements and organizational workflow. For more information, see Service Portal documentation.
- Program workbench does not support mobile device.

The program workbench comprises of the following components:

Fiscal period: A choice list on the top-right to select the fiscal year for which you monitor the program.

Timeline View: Shows a list of all the selected demands and projects that are part of the program, and a Gantt chart of all projects and demands over time.

You can:

- configure the colors of the program items in Gantt chart with Dashboard Configuration settings.
- select the zoom level in Gantt chart calender to **Auto Fit**. The Gantt view fits in one page to view entire timeline in one go without using the scrollbar.
- review the external dependencies between projects in a program. For more information on reviewing external dependencies, see Review external dependencies between projects in a portfolio.
- click the show/hide icon (⚙) to show or hide columns.

Note:

- A demand is included in the timeline view only if the **Expected Start** and **Due Date** fields are populated and if the demand is in qualified or approved state.
- Admin can customize which columns appear in the column filter list when the show/hide columns icon (⚙) is clicked in the timeline view.

Project KPI: The tab displays the most recent status of project KPIs such as overall health, schedule, cost, resources, and scope of all the projects in the program. This information is populated from the most recent status report created for the projects.

You can:

- click the name of a project in the tab to open the latest status report created for the project.
- point to a status indicator for a project KPI to view the comments entered for the KPI for that project.

Cost (Planned vs. Actual): The chart displays the actual costs from all projects in the program compared to the approved budget. The actual cost for projects is derived from the expense lines.

Note:
An expense line can be created manually for a project when a specific expense is incurred. For example, if hardware is procured for a project, an expense line can be created for the amount spent on procuring the hardware. If you receive an item using ServiceNow Procurement, an expense line is created automatically. For resource hours, the expense lines are created automatically when the time cards for the project are approved.

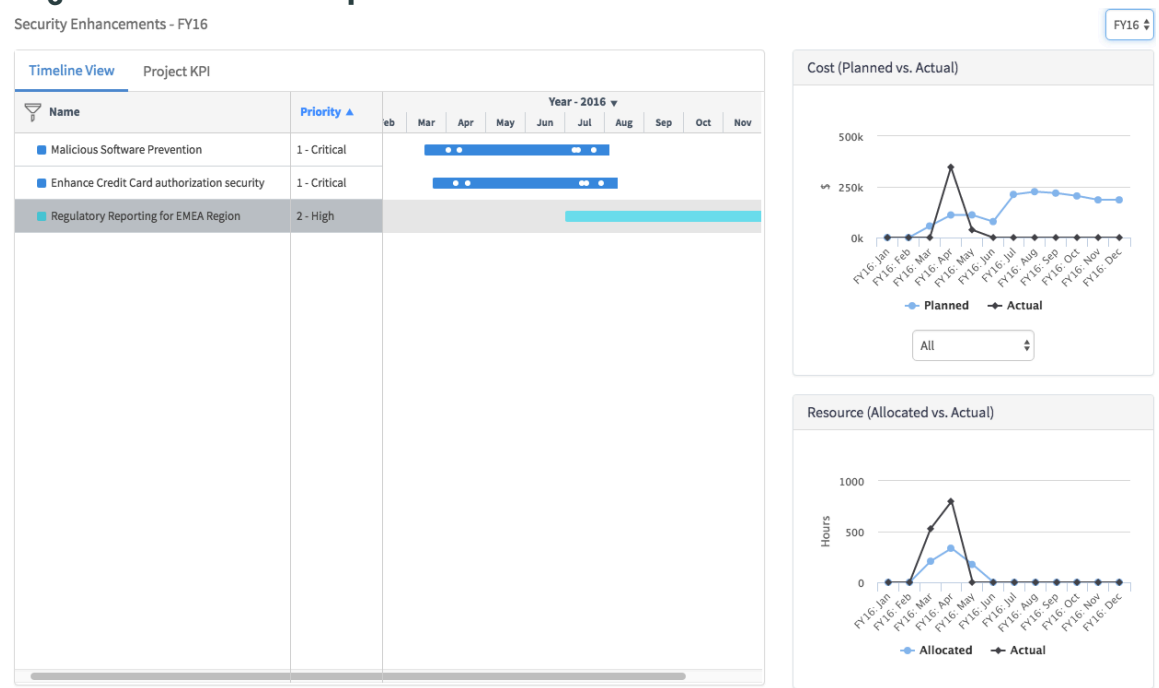
The display settings for the chart can be modified by selecting any of the following from the choice list:

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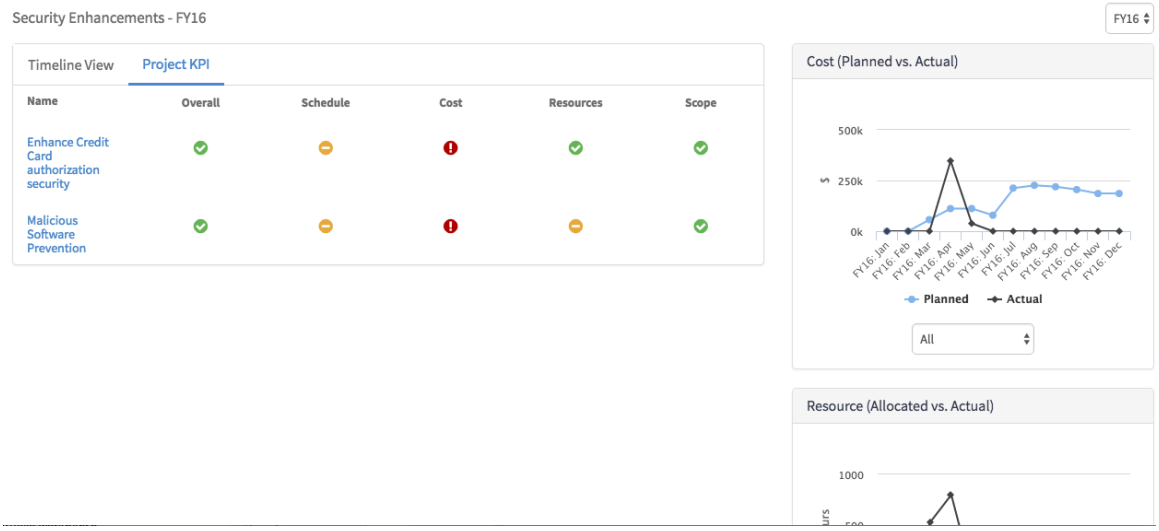
- **Capex**: Displays the cost chart for capital expense only.
- **Opex**: Displays the cost chart for operating expense only.
- **All**: Displays the cost chart for both capital and operating expenses.

Resource (Allocated vs. Actual): The chart displays the actual resource time spent on all project tasks versus the resource hours allocated to execute the projects and demands in the program. The actual time spent is taken from processed time cards for the projects.

Program Workbench Example 1



Program Workbench Example 2



Access the program workbench

When you access the program workbench, it displays a list of all the programs.

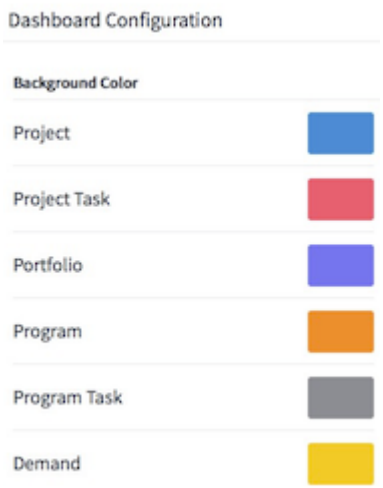
Before you begin

Role required: it_program_manager

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About this task
You can access the program workbench in one of the following ways.

Procedure
1. Click the **Program Workbench** related link on the Program form.
2. Navigate to **Project** > **Programs** > **Workbench** and click the configuration icon ( ) and select the colors for projects, tasks, programs, and so on.
   The workbench uses these colors to display the items in the program in the Gantt chart in timeline view.



3. Click the program that you want to open.
   The programs that are displayed in the workbench depend on how you launched the program workbench.
   - All programs are available in the workbench using the navigation menu option.
   - Only the associated program displays using the program form.

Program Dashboard

The PMO dashboard provides a central location to a program manager to generate different graphical reports.

From Madrid release onward, the program manager dashboard has been deprecated and replaced with the PMO dashboard. Use the PMO dashboard to gain insights about your programs. For more information, see PMO Dashboard.

Access the Program Dashboard

View different graphical reports for your programs on the PMO Dashboard.

Before you begin
Role required: it_program_manager

Procedure

Navigate to **Projects** > **Programs** > **Program Dashboard**.
The PMO Dashboard is displayed.

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Rate Models

Use a rate model to derive date-effective, criteria-driven hourly rates for calculating planned and actual resource costs for a project or demand.

Unlike labor rates, which are based on the user attribute only, a rate model can derive hourly rates based on up to ten attributes. These attributes can be selected from predefined entities such as projects, demands, users, and roles.

Rate lines

A rate model is a collection of multiple rate lines. A rate line is a unique combination of different criteria values that defines the hourly rate for a resource, group, or role for a specific date range. For the same set of criteria, you can create multiple rate lines with different rates for different date ranges provided that the dates don't overlap.

Rate model processing

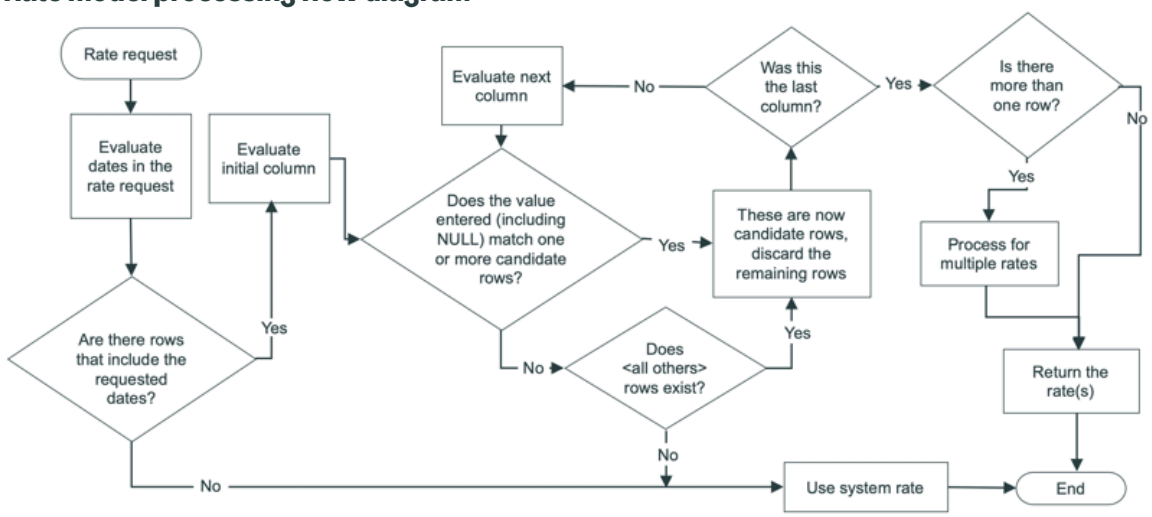
To derive hourly rates from a rate model for the resource plans and time cards of a project or demand, associate the rate model with the project or demand.

Note:
A project or demand without a rate model uses the labor rate cards associated with rate type to find a rate for the time cards.

The rate model associated with a project or demand evaluates the rate lines to find and return the hourly rate that matches the requested criteria. The rates are derived from the rate model during resource planning or allocation, and during time card processing.

The rate is returned in the functional currency specified in the matching rate line.

Rate model processing flow diagram



The following video describes how to set up a rate model and the evaluation method to find and return the hourly rate for a request. Video explaining how to work with rate models

When a rate is requested, the rate model uses the following process.

1. Finds the rate lines in the requested date range and discards the remaining rate lines.
2. Evaluates the identified rate lines to find values matching the requested value in the first criteria column and discards the remaining rate lines.

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If the requested value is empty, it checks for rate lines containing NULL.

If no exact match is found, it checks for the rate line having the value `All other (*)`.

The evaluation is repeated for the other criteria columns in order of priority until all criteria columns are processed.

3. Returns the rate if one or more rate lines match the request.

   - If a single rate line is found, the corresponding rate is returned.
   - If multiple rate lines are found, the system determines the number of hours in the request that applies to each rate.
   - For example, say the rate requested is for resource allocation from July 1 to July 30. The rate model has one rate from July 1 to July 15 and a different rate from July 16 to July 30 for the same set of criteria. The rate model applies the first rate to the requested hours for July 1–15 and the second rate to the requested hours for July 16–30.

   If no rate lines match the request, then the request uses the default rate card.

Create or modify a rate model

Create or modify a rate model that can be linked to a project or demand to determine planned costs and actuals for their resource. The rate model provides date-effective, criteria-driven hourly rates for these investments.

Before you begin

- Choose the attributes to define the criteria in a rate model to derive hourly rates.
- Define the budget reference rates for the non-functional currency for the required time periods.
- Role required: pps_admin or it_rate_model_admin

Procedure

1. Create a rate model.

2. On the form, fill in the fields.

Rate Model form

Field	Description
Name	Unique name for the rate model.
Active	Option for indicating the status of the rate model. Only active rate models can be assigned to a project or demand.
Default	Option for setting the rate model as the default. You can set only one rate model as default.

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Field	Description
	A default rate model is automatically associated to new projects and demands.
Rate model context	Context set for the rate model. Read-only system field.
Currency	Default currency for the rate lines in the rate model.
Rate type	Option for enabling the rate type attribute on rate lines in the rate model. When selected, **Rate type** is added as one of the attributes along with other defined attributes. For more information, see Rate type in labor rate card.
Description	Short description for the rate model.

3. Click **Submit**.

What to do next
Add attributes from a set of predefined entities to define the criteria for rate model to derive resource cost.

Define criteria of a rate model

Set the criteria of a rate model by adding attributes from a set of predefined entities to derive resource hourly rates based on the criteria.

Before you begin
Role required: pps_admin or it_rate_model_admin

About this task
A rate model consists of one or more rate lines. Each line contains a unique combination of criteria values and the hourly rate of a resource. You define the criteria by adding up to 10 attributes from the following entities:

- Project
- Project task
- Demand
- User
- Group
- Role
- Resource plan

You can select attributes of type String, Reference, Number, Boolean, and Choice.

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Procedure

1. Open a rate model by performing one of the following actions:
   - Navigate to **All** > **Project Administration** > **Rate Model** > **All**.
   - Navigate to **All** > **Time Sheets** > **Rate Model** > **All**.
2. In the **Rate Model Attributes** related list, click **New**.
3. On the form, fill in the fields.

Rate Model Attributes form

Field	Description
Entity	Entity from which the attribute is used to define the criteria.
Attribute	List of attributes from the selected entity to define the criteria.
Priority	Unique number that determines the order in which attributes in a rate model are evaluated to derive the hourly rate. An attribute with the lowest priority is evaluated first. **Note:** Two attributes cannot have the same priority.
Name	User-friendly name for identifying the attribute. The default name populated is based on the selected entity and attribute. For example, if you select Resource in the **Entity** field and Location in the **Attribute** field, then the default name is Resource/Location.

4. Click **Submit**.

What to do next

Create rate lines to define the hourly rates for resources.

Create a rate line

In a rate model, create a rate line to define an hourly rate based on a set of criteria for a given date range.

Before you begin

- Define criteria and add rate model attributes
- Role required: pps_admin or it_rate_model_admin

About this task

Before creating or updating a rate line, note the following points:

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- Rate lines with the same set of criteria values cannot have overlapping dates.
- A criteria field can be empty.
- All criteria fields on the form have a value `All other (*)` that, if selected, is considered by the rate model if no exact match exists for that criteria.
- To use a non-functional (non-default) currency in a rate line, ensure that the corresponding budget reference rate is available.

Procedure

1. Open a rate model by performing one of the following actions:
   - Navigate to **All** > **Project Administration** > **Rate Model** > **All**.
   - Navigate to **All** > **Time Sheets** > **Rate Model** > **All**.
2. On the Rate Model form, click the **View Rate Lines** related link.
3. On the Rate Lines form, click **New**.
4. On the form, fill in the fields.

Rate Lines form

Field	Description
Rate Model	Rate model the rate line belongs to.
Start date	Start date of the time period in which the rate is applicable.
End date	End date of the time period in which the rate is applicable.
Criteria fields	Fields corresponding to the rate model attributes added to define the criteria. The number of fields may vary. For example, if you have added Group and Location as rate model attributes, they are available as fields on the form where you can specify their values.
Rate	Applicable rate and currency of the rate line. By default, the currency of the rate model to which the rate line belongs is selected as the currency. You can select a rate currency, which can be different from the rate model currency. Rate lines with the same set of criteria values and currency must not have overlapping dates. A project or demand manager can track the resource cost for projects or demands in the corresponding project or demand currency by installing the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin and enabling the Project Currency view or Demand Currency view for resource

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Field	Description
	plans. For more information, see the Create a resource plan topic.
Rate Type	Labor rate type applicable for the rate line. The field appears if the **Rate type** check box on the Rate Model form is selected.
Rate in functional currency	Rate in the default currency configured in the Financial Management application. This field is not editable.

5. Click **Submit**.

Result
Rate lines that represent resource hourly rates based on defined attributes are created.

Export rate lines to a file

Export rate lines to a Microsoft Excel or CSV file to quickly update or add new rate lines and import them back into the rate model.

Before you begin
Before exporting rate lines, define the criteria of the rate model by adding attributes to it. The downloaded export file includes columns corresponding to the selected attributes and the following default columns:

Role required: pps_admin or it_rate_model_admin.

About this task
Besides creating rate lines one at a time, you can add multiple rate lines into a rate model using the export and import rate lines functions.

- Rate Model
- Number
- Start Date
- End Date
- Currency
- Rate
- Rate Type

> **Note:**
> The **Rate Type** column is available only if the **Rate type** check box is selected for the rate model.

The number of criteria columns depends on the number of attributes added in the rate model.

Procedure
1. Open a rate model by performing one of the following actions:
   - Navigate to **All** > **Project Administration** > **Rate Model** > **All**.
   - Navigate to **All** > **Time Sheets** > **Rate Model** > **All**.

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2. On the Rate Model form, select the **View Rate Lines** related link.
3. Select the more actions icon (⋯) and then select the **Export to CSV** option.
   A dialog box might prompt you to save or open the export file. By default, the file has the same name as the rate model. However, you can specify a different file name. Save the file either as a CSV file or Microsoft Excel (.XLSX) file.

   Note:
   Depending on your browser setting, the browser might automatically save the file to your Download folder.

4. Open the downloaded file using your preferred application.
   Enter new rate lines or update the existing ones and save the file either as a CSV file or Microsoft Excel (.XLSX) file.

Result
All rate lines in the rate model are exported to the file. If there is no rate line in the rate model, the file is an empty template containing only the column names in the first row.

What to do next
Import rate lines from the file into a rate model.

Import rate lines into a rate model

Use the import rate lines function to quickly add multiple rate lines from an export file into a rate model.

Before you begin
Set the *glide.import_set_row.dynamically_add_fields* system property to true.

Role required: pps_admin or it_rate_model_admin

About this task
After adding or updating rate lines in a file created using the export function, you can import the rate lines from the file into the rate model.

Note:
Rate lines fail to import in the following circumstances:

- Overlapping effective dates for the same set of criteria values.
- Criteria values with no matching data in the system. For example, a rate line might have Business Analyst as the **Role** criteria but that role does not exist in the system.
- Rates in non-functional (non-default) currency but no corresponding budget reference rates for the required period exist in the system.

Procedure
1. Import rate lines from an import file into the rate model in one of the following ways:
   - Navigate to **All** > **Project Administration** > **Rate Model** > **Import Rate Line**.
   - Navigate to **All** > **Time Sheets** > **Rate Model** > **Import Rate Line**.
   - Navigate to **All** > **Time Sheets** > **Rate Model** > **All**, open a rate model record, and click the **Import Rate Line** related link.
2. Click **Choose File** to select the import file.
3. **Optional:** If you are importing from an Excel file containing multiple sheets, enter the sheet number that contains the data to import in the **Sheet number** field.

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Note:
If you are importing from a CSV file, then the data from the last saved CSV file is considered for import irrespective of the specified sheet number.

4. **Optional:** If the import file has a header row, enter the row number that has the header information in the **Header row** field.
5. Click **Submit**.
6. Click **Run Transform** to import the data.
   For more information, see Run an import.

Result

- New rate lines are appended to the rate lines list in the rate model.
- Existing rate lines in the rate model are updated with the latest values.

Time Card Management

The Time Card Management feature enables time card users such as task assignees to report and track their time for the assigned tasks.

https://player.vimeo.com/video/1107432259?h=08347ba78f&badge=0&autopause=0&player_id=0&app_id=58479

Watch this three-minute video to learn about setup of the time tracking feature, entering time and approvals.

Time Card Management works with the Task table to record time worked on various task types, such as projects, incidents, problems, and change requests.

With the Time Card Management feature:

- The time card users can record the time worked on a task using time cards and time sheets. They can submit their time cards and time sheets for approval.
- Time cards and time sheets are routed for approval based on the **Non-project time approver** and **Project time approver** fields in the user time sheet policy. User managers with time card approver role can also log time and submit the time sheet of their resources
- The time card approvers can perform the following tasks:
  - Review and approve or reject the time cards in a submitted time sheet.
  - Recall the approved time sheets or time cards to return them to the users for corrections.
  - Use dashboards to view reports of time card and time sheet exceptions, and categorize time reported by the users.
  - Delegate another time card approver to process time sheets from your resources when you might not have time or will be unavailable. Note the following points for delegation:
    - You cannot delegate approval only for an individual resource.
    - The delegated time card approver cannot further delegate your time sheet approvals.

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The project_manager and the resource_manager roles contain the timecard_approver role in the base system. However, the timecard_approver role can also be used independently without these roles.

- The time card admin can create and manage time sheet policies, and can also approve or reject by exception and process the time sheets. Time card admin can also create or edit time cards of any users if the time cards are in Pending or Rejected state.

Note:
The Time Card Management plugin is required to use time cards. Some of the procedures require the project management feature, which activates time cards automatically. For more information, see Project Management (com.snc.financial_planning_pmo).

Domain separation in Time Card Management

Domain separation provides complete data isolation for domain-specific users. Time card Management is domain separation compliant at the **Data only** level.

Activate Time Card Management

Administrators can activate the Time Card Management plugin (com.snc.time_card). The plugin also activates the Performance Analytics - Content Pack - Project Portfolio Suite Dashboards plugin (com.snc.pa.time_card). However, you need a Performance Analytics license to use the dashboards.

Before you begin
Role required: admin

About this task
Note:
The Time Card Management plugin also gets activated as part of PPM Standard plugin (com.snc.financial_planning_pmo).

Procedure
1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

   Note:
   When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Time sheet policies

Time sheet policies contain the policies to which a time sheet, or a time card must adhere.

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By default, the Default time sheet policy is available with the system. As a Time card admin, you can create multiple time sheet policies based on different requirements and workflows in your organization. For example, specify a time sheet policy for each department or team and assign appropriate users to them.

Time sheet policies also provide an ability to specify appropriate approval workflow for project and non-project tasks.

A time sheet policy can be set as a default policy. The default policy is a global time sheet policy which applies to all the users who are not assigned to any other time sheet policy. Only one time sheet policy can be set as a default policy.

Navigate to **Time Sheets** > **Administration** > **Time Sheet Policies** to view the list of timesheet policies.

Create a time sheet policy

As a time card administrator, you can create a time sheet policy to define the requirements for time card users to record their time worked. The time card approvers must review and process time sheets under the applicable time sheet policy.

Before you begin

Role required: timecard_admin

Procedure

1. Navigate to **All** > **Time Sheets** > **Administration** > **Time Sheet Policies**.
2. Click **New**.
3. On the form, fill in the fields.

Time Sheet Policy form

Field	Description
Name	Unique name of the policy.
Allow blank time cards	Option to enable submission of blank time cards for approval. By default, this option is not selected.
Auto create time card on planned task update	Option to create a time card automatically when you update a planned task, if the following conditions are true: ○ You are a time card user ○ You are assigned to the task through **Assigned to** or **Additional assignee list** field ○ The task is not in a pending state. By default, this option is not selected.
Auto fill time card with time worked entries	Option to fill in time cards automatically when you enter time in the **Time worked** field on the Task form. If a time card does not exist for the task, one is created when the time worked is updated if the following conditions are true:

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Field	Description
	○ You are a time card user. ○ You are assigned to the task through the **Assigned to** or **Additional assignee list** field. By default, this option is not selected.
Auto create time cards every week	Option to generate time cards automatically every week through a scheduled job for all users assigned to the time sheet policy. The time cards are generated based on the planned task assignments and hard-allocated resource plans of the users. By default, this option is selected.
Update actual hours and cost in resource plan/reports	Option to update actual hours and actual cost of the associated resource plan based on the hours entered in the approved time card. When selected, you can associate a resource plan related to the selected task with the time card in the following ways: ○ If the task has multiple resource plans, you can select the appropriate plan. ○ If the task has one resource plan, that plan is selected by default. The hours from the time card entry and the hourly resource rate are used to update the **Actual hours** and **Actual cost** values of the associated resource plan. **Note:** If the task has no resource plan, the associated records update the corresponding project. By default, this option is not selected.
Allow recall	Option to enable the recall action on a time sheet or time card after it is approved and processed. By default, this option is selected.
Recall period allowed (days)	Number of days within which you can recall a time sheet or time card. This field appears when the **Allow recall** option is selected. The default value is 30.
Week starts on	Start day of the week for the time sheet. The default value is Sunday. **Note:** For more information on filtering Time Sheets using this field, see KB0852458 article in Now Support Knowledge Base.

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Field	Description
Maximum hours per day	Maximum number of hours that can be entered each day in a time sheet. The default value is 24. Setting this field to -1 enables the resource to enter: ○ A value from 0 through 24 for the hours worked each day ○ A negative value, to correct the previously entered timecards.
Maximum hours per week	Maximum number of hours allowed in a week in a time sheet. The value for total hours for a week in a time sheet is the sum of hours entered per day of that week. If set to -1, the total hours per week allowed is up to 168 (24 x 7) hours. The default value is 40.
Non-project time approver	Type of approval required when you submit a time card that has a non-project task assigned. ○ **Auto**: Time card is auto-approved when submitted. ○ **User Manager**: Time card is routed to the user manager for approval when submitted. The user manager has the time card approver role and is also selected as the manager of the time card user on the User form. ○ **None**: A user with the timecard_admin role can approve time cards when submitted.
Project time approver	Type of approval required when you submit a time card that has the project task. ○ **Auto**: Time card is auto-approved when submitted. ○ **Project Manager**: Time cards for a project task are routed to the respective project manager for approval when submitted. The project manager is picked from the task against which you are submitting time. ○ **User Manager**: Time cards are routed to the user manager for approval when submitted. ○ **Both**: Time cards are routed to both the user manager and project manager for approval when submitted. A time card remains in the Submitted state when only one of the approvers approves the time card. ○ **None**: A user with the time_card admin role can approve time cards.

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Field	Description
	Note: ○ The project manager and the user manager can view only those time cards that are routed to them for approval. ○ If the user manager or the project manager changes while the time card is still not approved, the system automatically updates the approver of the time card. ○ If the name of the project manager or the user manager is not populated on the respective form, a user with the time_card admin role can approve time cards.
Allow multiple rate types	Option to provide a rate type in a time card to be used during expense line generation. When this option is selected, the **Rate type** field displays on the Time Card form to enable the selection of a rate type. For more information, see Rate type in labor rate card.
Default rate type	Rate type used by default for the time card. If you select none, the Standard rate type option is used. This field appears when the **Allow multiple rate types** check box is selected.
Default Policy	Option to set the time sheet policy as the default. The default policy is a global time sheet policy that applies to all users who are not assigned to any other time sheet policy. Only one time sheet policy can be set as the default. A time sheet policy set as the default policy cannot be deleted. You must first set another policy as the default policy.

4. Click **Submit**.

What to do next

- Set the time sheet policy as the default policy, if required.
- Assign the time sheet policy to users.

Set a time sheet policy as default policy

As a time card administrator, you can set a time sheet policy as the default policy. The default policy is a global time sheet policy which applies to all the users who are not assigned to any other time sheet policy.

Before you begin

Role required: timecard_admin

About this task

Only one time sheet policy can be set as a default policy.

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Procedure

1. Navigate to **All** > **Time Sheets** > **Administration** > **Time Sheet Policies**.
2. Open the time sheet policy record.
3. Click the **Set as default** related link.

> **Note:**
> The related link appears only for a time sheet policy which is not already set as the default policy.

Result

The **Default Policy** option on the record form is selected to indicate that the current time sheet policy is set as the default policy. The **Default Policy** option on the earlier default time sheet policy is cleared.

You cannot delete a default time sheet policy. You must first mark another policy as the default policy to delete the current default policy.

Assign a time sheet policy to a user

As a time card administrator, you can assign a time sheet policy to a user.

Before you begin

Role required: timecard_admin

About this task

You can assign only one time sheet policy to a user.

Procedure

1. Navigate to **All** > **Time Sheets** > **Administration** > **Time Sheet Policies**.
2. Open the time sheet policy record.
3. In the **Users** related list, click **Edit**.
4. On the Edit Members form, move the users to the **User List**.
5. Click **Save**.

Result

The selected users appear on the **Users** related list. The time sheet policy is assigned to the selected users.

Create a project time category

A time card admin or a project manager can create subcategories to define specific activities in the projects. The time card users can use these project subcategories to report time for a specific activity in a project.

Before you begin

Role required: timecard_admin, it_project_manager

Procedure

1. Navigate to **All** > **Time Sheets** > **Administration** > **Project Time Categories**.
2. Click **New**.
3. Fill in the fields.

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Project time category form fields

Field	Description
Name	Unique name for the project time category.
Description	A description of the type of project activity.

4. Click **Submit**.

Create a rate type

You can create rate types using the Rate Types feature.

Before you begin

Role required: timecard_admin

About this task

The rate type functionality is used to categorize different types of work. For example, Standard versus Overtime. It can also instruct down-stream, third-party product about the nature of the work performed.

For example:

- A user works extra time during the day and must differentiate standard time from overtime.
- A technician may be paid at a higher rate based on different types of work involved in the execution of a task.
- An appliance repair task may be billed at one rate for the first hour and a different rate for the remaining hours.
- A service call may last four hours during which specialized equipment is used for one hour. The company must capture the use of the specialized equipment for purposes ranging from additional billing to legal compliance or warranty tracking.

Procedure

1. Navigate to **All** > **Time Sheets** > **Administration** > **Rate Types**.
2. Click **New** and fill the form.
3. Click **Submit**.

Result

- The rate type is displayed in the **Rate Types** list.
- The rate type if active is also displayed in the **Rate Type** field in the Labor Rate Cards form, Time Worked form, Time Card form, and Time Sheet Portal.

Time Sheet Portal

Time Sheet Portal categorizes and displays all your assigned tasks in a single view for a given week. The portal enables you to record time spent on tasks on a day-to-day basis and submit the time sheet in a single action.

Time Sheet Portal works with the Task table to record the time that you spend on various task types, such as projects, incidents, problems, and change requests. It provides a complete

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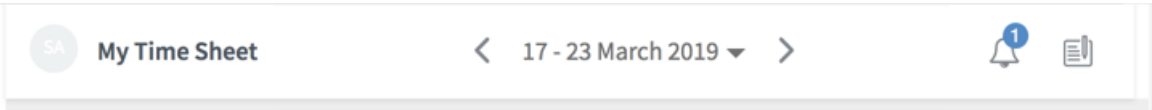
breakdown of the time you enter for the task, task categories, and days in a week. It enables you to:

- Generate time cards for assigned projects or project tasks.
- Copy time cards from a previous time sheet.
- Search and create a time card for a task that is not displayed in the assigned tasks list.
- Edit, delete, or add notes to a time card.
- Submit, approve, reject, and recall a time sheet.
- View notifications for the submitted, rejected, and recalled time sheets or time cards.

Starting Xanadu release, users can select a resource assignment to associate it with time cards to calculate the actual efforts and tag them to the respective projects. For more information on how to enable resource assignments column on time sheet portal, see KB1649389 in the Now Support Knowledge Base.

Time Sheet Portal comprises of the following sections:

Header

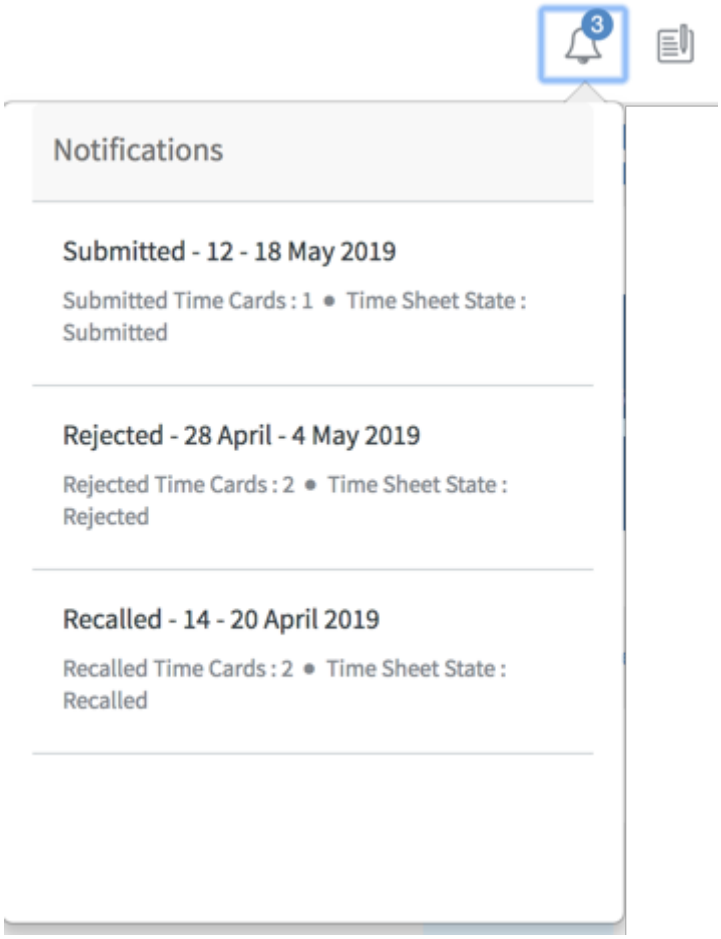


The Time Sheet Portal header:

- Displays a date range of the time sheet for the selected week and provides options to navigate to the time sheet of previous or next week.
- Provides a calendar along with the date range. Clicking a date in the calendar displays the time sheet for the week of the selected date.
- Provides a link to navigate to the time sheet for the current week when a different time sheet is being viewed.
- Provides an option under **My Time Sheet** that enables you to open and edit the time sheets of your resources. The option is available only for a user manager.
- Provides an option to view the time sheet in the Form view using time sheet form view icon ( ).

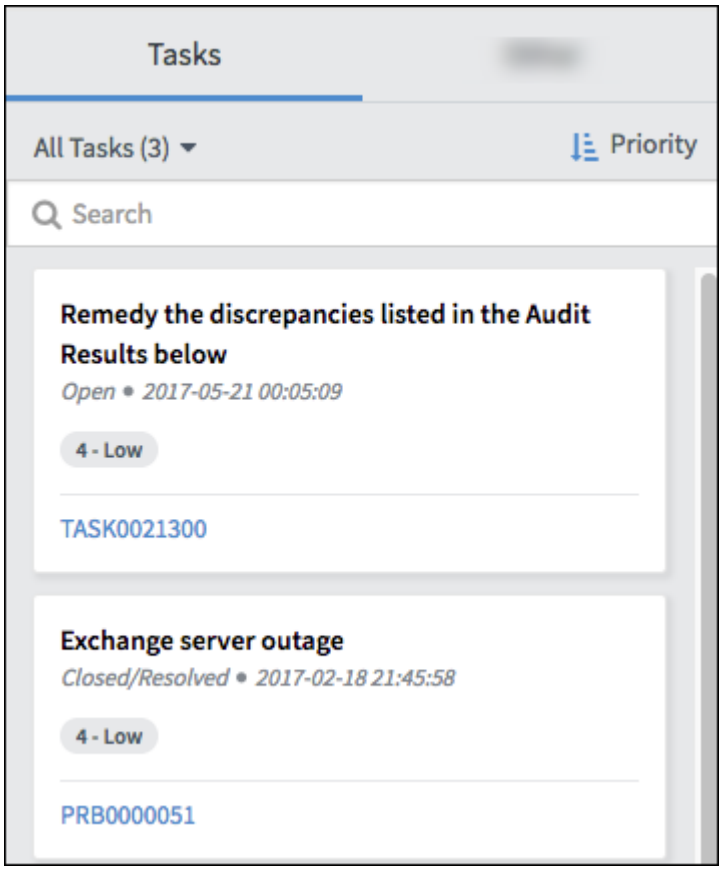
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- Displays the notifications for the submitted, rejected, and recalled time sheets under the show notifications icon ( ). Each entry displays the number of time cards and their state. Click on a notification item to open the time sheet.



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Tasks



The **Tasks** tab displays your assigned tasks as cards. Each card provides information about a task, such as short description, state, last updated date and time, and priority. Tasks are derived from the following filter conditions:

- All your assigned incidents, problems, or change requests that are active.
- All your assigned incidents, problems, or change requests that are closed in the selected week.
- All tasks for which you are hard-allocated during the selected week.
- All your assigned projects or project tasks that are active during the selected week. Project or project tasks are derived from the following conditions:
  - A project or project task that has started and its actual start date is before the end of the selected week.
  - A project or project task has closed and its actual end date is after the week has begun.
  - When there are no actual dates for a project, planned dates of the project must occur within the selected week.
- All active stories assigned to you.
- All active scrum tasks assigned to you or closed in the selected week.
- All active test plans assigned to you.
- All active defect and enhancements assigned to you or closed in the selected week.

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Note:
If the Customer Service Management plugin (com.sn_customerservice) is activated, your assigned tasks that are active and closed in the selected week are also derived from the following tables:

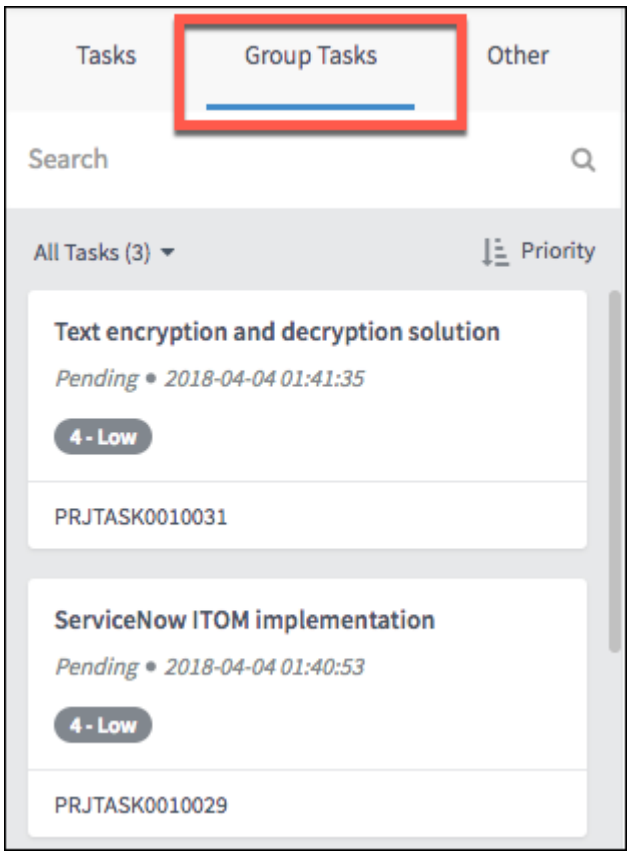
- Case [sn_customerservice_case]
- Work Order [wm_order]
- Work Order Task [wm_task]

On the **Tasks** tab, you can perform the following operations:

- Type a keyword in the search field to view only cards with details that match the keyword.
- Sort cards in ascending or descending order based on priority, irrespective of the task type.
- View cards based on a category, such as projects, project tasks, incident, problem, change, defect, enhancement, test plans, and scrum tasks.
- Create time cards for assigned tasks. See Create time cards and log time through Time Sheet Portal.

Note:
Time sheet policies apply when you create or edit a time card.

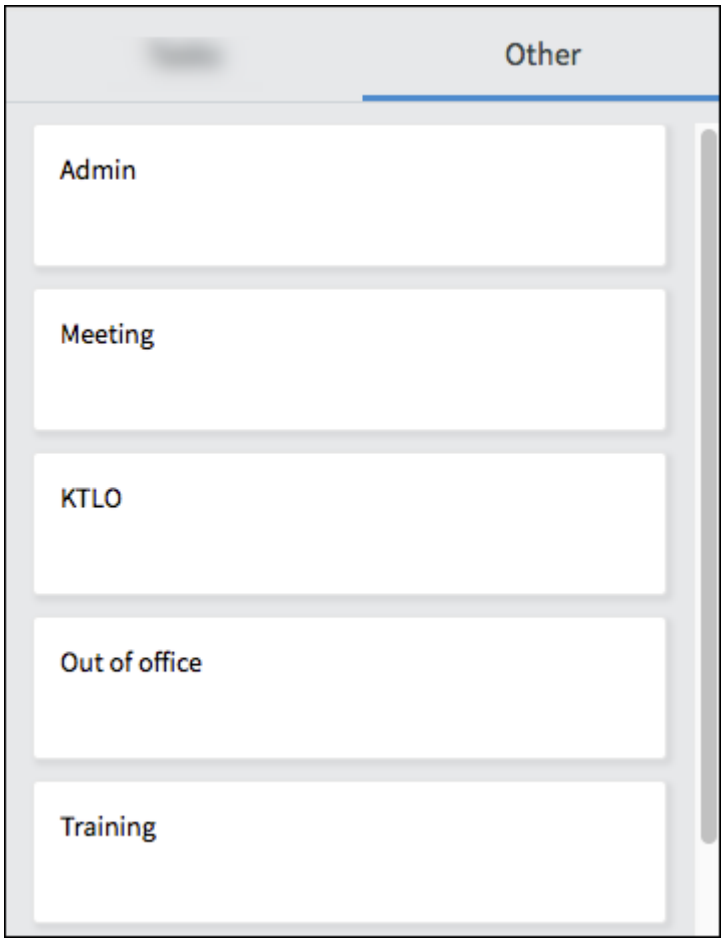
Group Tasks



The **Group Tasks** tab displays the tasks assigned to your **Assignment group**. The group tasks are displayed as cards in the tab. A card provides information about the task, such as short description, state, last updated date and time, and priority.

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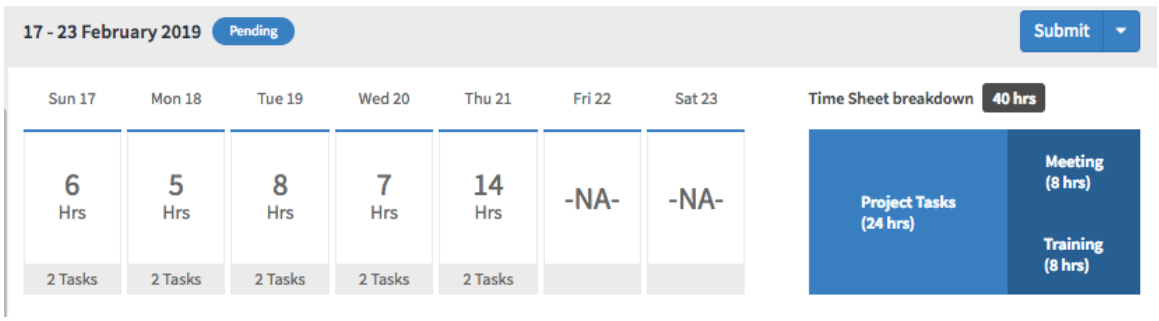
Other



The **Other** tab displays cards used to log time for operational work, such as administration, meeting, and KTLO.

Note:
The list of categories in the time card controls the list of cards displayed on the **Other** tab. If an administrator marks any of the categories as inactive in the time cards, those categories are not displayed on the **Other** tab.

Time Sheet



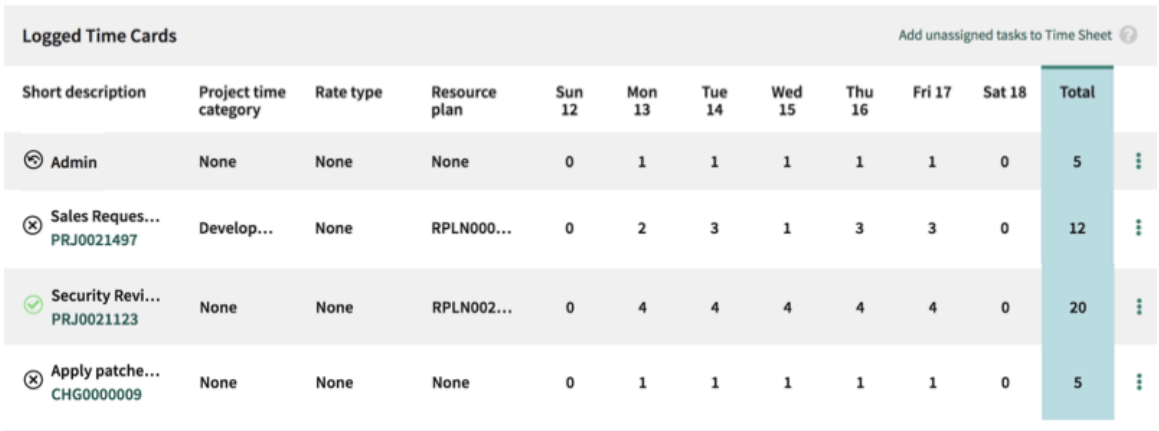
Starting Xanadu release, time cards and time sheet portal supports resource assignments. Users can select a specific resource assignment while creating time cards and submitting a time card via time sheet portal. Your system administrator can enable the resource assignment column in time sheet portal. For more information on how to add resource assignment column to time sheet, see the Knowledge Base for KB1649389.

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The Time Sheet section:

- Displays the date range of the time sheet for the selected week.
- Indicates the state of the time sheet being viewed.
- Displays the total number of tasks and hours that you have entered for each day in a week. When you click a day in the time sheet, the column for that day is highlighted in both the **Time Sheet** and **Logged Time Cards** sections. The first day displayed in the Time Sheet section is based on the value specified in the **Week starts on** field in the users Time Sheet Policy. For example, if the **Week starts on** field is set to Friday, the Time Sheet section starts with Friday.
- Indicates the total number of hours that you entered in the time sheet. Time Sheet breakdown also displays a breakdown of user-entered hours in different work categories, such as project tasks, admin, meeting, follow on tasks, or change requests.
- Provides options that enable you to submit a time sheet and copy time cards from a previous time sheet. For an approver, options to approve or reject a submitted time sheet and recall a processed time sheet are available.

Logged Time Cards



Short description	Project time category	Rate type	Resource plan	Sun 12	Mon 13	Tue 14	Wed 15	Thu 16	Fri 17	Sat 18	Total
Admin	None	None	None	0	1	1	1	1	1	0	5
Sales Reques... PRJ0021497	Develop...	None	RPLN000...	0	2	3	1	3	3	0	12
Security Revi... PRJ0021123	None	None	RPLN002...	0	4	4	4	4	4	0	20
Apply patche... CHG0000009	None	None	None	0	1	1	1	1	1	0	5

Each row in the Logged Time Cards section represents a time card entry for a given week. It has details such as icon for state of the time card, short description of the task, project time category, rate type, resource plan, and logged time. Each row of the time card contains options that enable you to edit, delete, or add notes to a time card. For more information, see Create time cards and log time through Time Sheet Portal.

Note:

- The **Rate type** column is visible only when the **Allow multiple rate types** option in the time sheet policy of the user is selected.
- The **Resource plan** column is visible only when the **Update actual hours and cost in resource plan/reports** option in the time sheet policy of the user is selected.

The icon beside the short description of a row indicates a time card state. The merge icon ( ) in a time card row indicates that a duplicate time card for the same task exists in the time sheet and provides option to merge them into a single time card.

When there are no time cards, the Logged Time Cards section displays the **Generate Time Cards** and **Copy from previous time sheet** buttons to create time cards.

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Note:
Time Sheet Portal is not designed for use on mobile devices, and may not appear as shown in this document.

Add columns to the logged time card list

Add columns in the logged time card list on the Time Sheet Portal to show additional information that you might require to log your time cards.

Before you begin
Role required: admin or sp_admin

About this task

Procedure

1. Navigate to **All** > **Service Portal** > **Widget Instances**.
2. Search the Widget column for **Time Card Portal Main Container** and open the record.
3. On the Instance form, update the code by providing values for the following column configurations in the **Additional options, JSON format** field.

Instance form

Column configuration	Description
name	Name of the column in a table.
label	Column name to display in the logged time card list on the Time Sheet Portal. The configuration is mandatory if you are adding a column of a table other than the Time Card [time_card] table.
width_in_percent	Column width in percentage in the logged time card list.

Note:
To add more than one column, separate each column configuration with a comma. The columns are added in the same order as you add them in the code.

4. Click **Update**.

Example:
The following sample code adds the **category** column of the Time Card [time_card] table with the column name **Category** and width of 10% in the logged time card list on the Time Sheet Portal.

```
{
  "tm_grid_options": {
    "displayValue": "Time card grid options",
    "value": {
      "header_fields": [
        {name:"category",label:'Category', width_in_percent: 10}
      ]
    }
  }
}
```

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Create time cards and log time through Time Sheet Portal

After you create time cards in Time Sheet Portal, log time in the time cards.

Before you begin

- Time sheet portal supports resource assignments created using Project Workspace. Once the time cards are approved, Project Managers can view the planned vs actual hours for an assignment in Project Workspace and Resource Management Workspace heatmap view.
- Role required: timecard_user

Procedure

1. Navigate to **All** > **Time Sheets** > **Time Sheet Portal**.
2. Create time cards in the **Logged Time Cards** section using any of the following options.

   Based on the **Allow time card reporting on** field settings in the **Preferences** tab of a project, the **Add to Time Sheet** and **Add selected to Time Sheet** options are displayed in Time Sheet Portal.

   If a duplicate time card exists for a time card, you can merge both time cards to become a single one, except for time cards in the processed, approved, or recalled state. A duplicate time card is identified by comparing the values in the **Short description**, **State**, **Task**, **Category**, **Rate Type**, **Resource Plan**, or **Project Time Category** fields in the time card.
3. In the **Logged Time Cards** section, log time in a time card.

Result

Your time cards are created and time is logged for the selected week.

What to do next

If you encounter issues with time card creation or time logging, try the following:

- Time cards not generating: Verify that your project tasks are in progress or planned for the selected week, and that the **Allow time card reporting on** field is configured on the project.
- Missing tasks in the portal: Ensure you are assigned to the project tasks and that the task dates overlap with the selected time sheet week.
- Duplicate time cards: Use the merge option to combine duplicate time cards. Duplicates are identified by matching Short description, State, Task, Category, Rate Type, Resource Plan, or Project Time Category fields.
- Incorrect rate type: Verify your default rate type on your user profile. Contact your time card administrator (timecard_admin role) to update rate type settings.

For issues you cannot resolve, contact your system administrator or the user with the timecard_admin role in your organization.

Submit time sheet through Time Sheet Portal

Once you update the time sheet with time worked for a given week, submit it for approval.

Before you begin

Role required: timecard_ user

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About this task
When you submit a time sheet, time cards are verified against the assigned time sheet policy. If there is no time sheet policy assigned, time cards are verified against the default time sheet policy. Business rules prevent you from submitting a time sheet in case any violation is found.

Procedure
1. Navigate to **All** > **Time Sheets** > **Time Sheet Portal**.
2. Click **Submit**.
   The time sheet moves to the Submitted state.

Approve or reject a time sheet through Time Sheet Portal

Review, approve, or reject a time sheet submitted by a time card user that you manage.

Before you begin
Role required: timecard_approver or timecard_admin

About this task
A user manager can review, approve, or reject the time sheets or time cards submitted by the time card users. The user manager has either of the required roles and is the one listed as the manager of the time card users.

During out-of-office time, the user manager can delegate another user with the required roles as the time sheet approver. For the specified time period, the delegated user also receives all the time sheets submitted by the time card users to process.

Procedure
1. Navigate to **All** > **Time Sheets** > **Time Sheet Portal**.
2. Click the **My Time Sheet** list and select a time card user under **My Resources**.
   The **My Time Sheet** list is available only for a user manager.
3. Select the appropriate time sheet period by navigating through the calendar.
4. Click **Approve** or **Reject**.

Log time and submit time sheets of your resources

As a user manager, you can log time and submit the time sheet of your resources.

Before you begin
A user manager must have time card approver role to create and edit time cards, and submit the time sheet of other time card users. The user manager has either of the required roles and is the one listed as the manager of the time card users.

Role required: timecard_approver

Procedure
1. Navigate to **All** > **Time Sheets** > **Time Sheet Portal**.
2. Click **My Time Sheet** choice list and select the user for whom you want to approve or reject time sheet for under **My Resources**.

   The **My Resources** section lists the time card users reporting to you.

   Note:
   The choice list with **My Time Sheet** is available only for a user manager.

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3. Create time cards and log time through Time Sheet Portal as required.
4. Click **Submit**.

Result

- The time sheet of the selected user moves to the Submitted state. The time sheet policy assigned to the time card user is used for validation when you submit the time sheet.
- All the time cards associated with the time sheet are also submitted automatically and move to the Submitted state.
- The **Approve** and **Reject** buttons appear in the Time Sheet section. The two buttons appear only for a user manager.

What to do next

Once you have submitted the time sheet for your resource, you can click **Approve** or **Reject** to approve or reject it. Only the time cards that are routed to the user manager, are approved or rejected. The routing for approval happens based on the **Non-project time approver** and **Project time approver** fields in the time sheet policy of the time card user.

Time Sheets

A time sheet groups all the time cards for a user for the given week.

With time sheets:

- Time card users can submit all the time for their work week in a single step by using a time sheet.
- Time card approvers can approve all the time cards in a time sheet for a user in a single step by approving the time sheet. They do not need to approve multiple time cards for a given user individually.
- Track the activities of a time sheet, such as who submitted or approved a time sheet, in the Activities section on the Time Sheet form. This time sheet activity audit is useful for tracking when you delegate responsibility for your time card processing to another user. To track the activities, enable the **State** field of the Time Card [time_card] table for auditing the time card activities, if it is not already enabled. For more information, see Include a table field in auditing .

Starting Xanadu release, users can select a resource assignment to associate it with time cards to calculate the actual efforts and tag them to the respective projects. For more information on how to enable resource assignments column on time sheet portal, see KB1649389 in the Now Support Knowledge Base.

A time sheet can have any of the following states:

Pending

A time sheet has been created, but the user is still making changes before submitting it.

Submitted

A time sheet has been submitted for approval. The approver can approve or reject it.

Approved

A time sheet has been approved. If the time sheet isn't automatically updated to Processed, this means there was no task associated with the time sheet.

Processed

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A time sheet has been processed by the system. After a time sheet is approved, the after business rule Create expense from approved time card is triggered. This business rule creates an expense line for the associated task, and then updates the state to Processed.

Rejected

A time sheet has been sent back to the submitter for changes.

Recalled

A time sheet has been recalled by the submitter for modification.

Create a time sheet

As a time card user, you can create a time sheet to group all your time cards for the given week and submit them in a single step.

Before you begin

Role required: timecard_user

About this task

A user can create only one time sheet per week.

Note:
When a user creates a time card for a week, a time sheet is also automatically created for that week.

Procedure

1. Create the time sheet with one of these options.

2. On the form, fill in the fields.

Time Sheet form

Field	Description
Week starts on	Starting date of the week for which the time sheet is created. **Note:** The time sheet policy **Week starts on** controls the start day of the week.
Total Hours	Number of hours the user has worked in that week. This field is automatically populated from the hours recorded for the associated time cards.
User	Name of the user for which time sheet is created.
State	Current state of the time sheet. All new time sheets begin as Pending. Default states: Pending, Submitted, Approved, Processed, and Rejected, Recalled.
Comments	Comments related to the time sheet.
Notes	Any additional information.

3. Click **Submit**.

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What to do next
Add time cards to the time sheet. You can use the related links and related list to add time cards. You can also add time cards using the Time Sheet Portal.

Time sheet form related links

Field	Description
Generate Time Cards	Link to generate time cards for the assigned project tasks.
Copy from previous time sheet	Link to open the **Copy Time Sheet** window for you to copy the time cards from previous time sheets.
Time Sheet Portal	Link to open the Time Sheet Portal to view and manage the time sheet.

Time sheet form related lists

Field	Description
Time Cards	List of the time cards that are part of the time sheet. To create a time card, click **New**.

Submit a time sheet

Once the time sheet is updated with time worked, you can submit the time sheet for the week to submit all the time cards for the week together.

Before you begin
Role required: timecard_user

About this task
When a user submits a time sheet, the time sheet policy assigned to the user is used for validation. If there is no time sheet policy assigned to the user, the default time sheet policy is used. Business rules prevent a user from submitting a time sheet in case any violation is found.

Note:
You can also perform this task from the Time Sheet Portal.

Procedure
1. Navigate to the time sheet using one of the following options:
   - To submit a time sheet in the Pending state, navigate to**Time Sheets** > **My Time Sheets** > **Pending**.
   - To submit the time sheet for the current week, navigate to **Time Sheets** > **My Time Sheets** > **Current Time Sheet**.
   - To submit a time sheet in the Rejected state, **Time Sheets** > **My Time Sheets** > **Rejected**. You can make required changes as suggested in the rejection comments to resubmit a rejected time sheet.
2. To submit in the Time Sheets list, open the time sheet.
3. Add comments, if required.
4. Click **Submit Time Sheet**.

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Result

- The time sheet moves to the Submitted state.
- All the time cards associated with the time sheet are also submitted automatically and move to the Submitted state.

Approve or reject a time sheet

View, approve, or reject time sheet or time cards for your user, for the given week, in a single step.

Before you begin
Role required: timecard_approver or timecard_admin

About this task
A user manager is the one who has either of the required roles and is selected in the **Manager** field on User form of the time card user.

During out-of-office time, the user manager can Delegate time sheet approvals to another user with the required roles as the time sheet approver. For the specified time period, the delegated user also receives all the time sheets submitted by the time card users to process.

Note:

- You can also approve or reject the time cards within a time sheet selectively by selecting one or more time cards and approving or rejecting them.
- If a time sheet is rejected, all the associated time cards in the Submitted state are also rejected automatically. The time cards in the Approved and Processed state for the time sheet remain unaffected.
- If all the time cards in a time sheet are approved, the time sheet automatically moves to the Approved state.
- If a time card in a time sheet is in the Rejected state, then irrespective of the state of other time cards in the time sheet, the time sheet also moves to the Rejected state.

Procedure

1. Navigate to **All** > **Time Sheets** > **Time Sheets** > **Pending Approval**.
2. In the Time Sheets list, open the time sheet to approve or reject.
3. If required, add comments.
4. Click **Approve** or **Reject**.

Result
The time sheet moves to the Approved or Rejected state.

- If a time sheet is rejected, it gets listed in the notifications for the rejected time sheets under the show notifications icon ( ) on Time Sheet Portal and is moved back to the submitter to adjust the corrections and resubmit it. For more information, see Submit a time sheet.
- Once a time sheet is approved, all the time cards associated with the time sheet are also approved or rejected automatically.
- If any time cards in the time sheet are pending approval by one of the approvers as defined by the time sheet policy, the time sheet remains in the Submitted state.

Recall a processed time sheet

You can recall an incorrect time sheet in the Approved or Processed state to return it to the submitter. The submitter can then make the necessary changes and resubmit the time sheet.

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Before you begin
Role required: timecard_approver or timecard_admin

About this task
The recall option is available only if the **Allow recall** option is selected on the associated time sheet policy.

Procedure
1. Navigate to the approved or processed time sheet you want to recall using one of the following options.

2. Click **Recall**.

Result
- Changes the state of the time sheet and associated time cards to **Recalled**.
- Reverts the actual effort and resource hours in a project or demand created when time cards that have task types were approved.
- Creates negative expense lines to zero out the corresponding expense lines created when the time sheet was approved.
- Returns the time sheet to its submitter for modifications.

Delegate time sheet approvals to another user

You can delegate the responsibilities to process the time sheets of your resources to another user when you might not have time or will be unavailable.

Before you begin
Role required: timecard_admin or timecard_approver

About this task
The delegate must have the timecard_approver role.

Procedure
1. Navigate to **All** > **Time Sheets** > **Delegate**.
2. In the Delegates list, click **New**.
3. On the form, fill in the fields.

Delegate form

Field	Description
User	User from whom the approvals and tasks are delegated to another user.
Delegate	User to whom the approvals and tasks are delegated.
Starts	Start date of the delegation period.
Ends	End date of the delegation period.
Approvals	Option that enables time card approval delegation.

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Note:
The other options on the form (**Assignments**, **CC notifications**, and **Meeting invitations**) are not applicable for time sheet approval delegation.

4. Click **Submit**.

Result

The approval delegation has the following effects during the specified period:

- Both you and the delegate receive notifications regarding approval activity.
- On the Time Sheet Portal, the delegate can see your resources under **Delegates** in the **My Time Sheet** list.
- Delegates can perform all the functions that you can do for your resources in the Time Sheet Portal: Create and submit their time sheets, approve or reject the submitted time sheets, and recall the processed time sheets.

Time cards

Time cards are used to record the time worked on a task by a task assignee.

The time card management feature works with the Task table to record time worked on Projects, Incidents, Problems, and Change Requests.

Task assignees can record time worked in the *Time worked* field on a task record or enter hours directly into their time card. Some tables support automatic time card creation based on start and end date fields.

Track the activities of a time card, such as who submitted or approved a time card, in the Activities section on the Time Card form. This time card activity audit is useful for tracking when you delegate responsibility for your time sheet processing to another user. To track the activities, enable the **State** field of the Time Card [time_card] table for auditing the time card activities, if it isn't already enabled. For more information, see Include a table field in auditing.

You can associate time cards for the project tasks and other task categories, such as meeting and training, with relevant resource plans.

When you approve a time card, the time logged in the time card is saved day-wise in the Time Card Daily [time_card_daily] table. Using daily time logged data, you can generate time card reports by days for any period irrespective of the time sheet period to which the time cards belong. For example, you can create a monthly time card report that includes time cards from the first day to the last day of the month.

Time cards also have an optional approval mechanism for project managers to approve the time cards. Administrators and time card approvers can see all the time cards for the week. All users who are in a role that is responsible for working on tasks also can access their personal time cards. A time card can have any of the following states:

Time Card states

State	Description
Pending	A Time card that isn't submitted for approval.
Submitted	A time card submitted for approvals.
Approved	An approved time card.

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Time Card states (continued)

State	Description
Processed	An approved time card with an expense line for the associated task.
Rejected	A rejected time card.
Recalled	An approved time card recalled for any required adjustments.

Create a time card

You can create time cards to log time against the work you have done.

Before you begin

Role required: timecard_user

About this task

Starting Xanadu release, users can select a resource assignment to associate it with time cards to calculate the actual efforts and tag them to the respective projects. For more information on how to enable resource assignments column on time sheet portal, see KB1649389 in the Now Support Knowledge Base.

The **Allow time card reporting on** field on the project form determines the level at which the time cards for the project tasks can be created.

Note:
Time Cards created from Project form do not populate Resource plans automatically to avoid random allocations. For more information, see KB0814884 article in the Now Support Knowledge Base.

Time cards can be created automatically or manually.

- *Automatic*: Use the following options to automatically generate the time cards:
  - *By updating task*:

    Auto create time card on task update

    Configure time cards to be created when a user updates a task record. The **Auto create time card on task update** setting in the assigned time sheet policy controls this behavior and is set to false by default.

    Auto fill time card with time worked entries

    Configure time cards to be created when a user records **Time worked**. A time card is created if a time card does not exist for the task. The time sheet policy **Auto fill time card with time worked entries** controls this behavior and is set to false by default.

    In **Project Task**, **Incident**, **Problem**, and **Change** records, the **Time worked** field does not appear by default and must be configured on the form.

  - *By scheduled job*: Configure time cards for the project tasks to be generated automatically for users through a scheduled job. Only the admin can configure a scheduled job.

Note:
Time cards cannot be created automatically when you use the mobile interface. Use the desktop interface if you want to use the automatic time card feature.

- *Manual*: Create a time card for each task and enter the time manually.

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Procedure

1. Create the time card using one of the following options.

2. On the form, fill in the fields.

Time card form

Field	Description
Week starts on	Starting date of the week of the time sheet. **Note:** The time sheet policy **Week starts on** controls the start day of the week. A message is displayed when you try to associate a resource plan with a time card when the week on which the time card starts is outside the resource plan dates.
State	Current state of the time card. All new time cards begin in the Pending state. Different states of a time card are Pending, Submitted, Approved, Processed, Rejected, and Recalled.
Category	Type of task for which the time card is created.
Task	Task that is associated to the time card.
Project time category	Type of activity in the project that time is reported for. This field appears when you select **Project/Project Task** or **Task work** in the **Category** field.
User	Name of the user that the time card is created for.
Resource assignment	Select a resource assignment assigned to the user. When the time card is approved, the actual hours are used to view the planned vs actual hours in the heatmap view in Project Workspace and Resource Management Workspace. A resource assignment is associated with the time card in the following ways: ○ If the user has multiple resource assignments, you can select the appropriate assignment. ○ If the user has only one resource assignment, that plan is selected by default.

3. Click **Submit**.

Result

- The time card is created for the selected time card period.
- If the time sheet for the week does not exist, a time sheet is created for the time card week.

What to do next

After the time card is created, the hours for that task can be incremented automatically from the **Time worked** field in the task record. The time sheet policy **Auto fill time card with time worked entries** controls the way the time is updated in time cards. The policy is set to *false* by default. If

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automatic updates for time worked are not configured, the user must manually update the time card.

Related topics

Map a time card category with operational work types

Copy time cards from a previous time sheet

Another option for creating time cards is to copy them from an existing timesheet, which copies all the time cards (for project as well as non-project tasks) from a selected time sheet.

Before you begin
Role required: timecard_user

About this task
You can also perform this task from the Time Sheet Portal.

Procedure

1. Open the time sheet record that you want to create the time cards for.
2. Click the **Copy from previous time sheet** related link.
3. In the **Select Time Sheet** field, select a previous time sheet that you want to copy the time cards from.
4. **Optional:** You can copy the time logged for the tasks in the previous time sheet, select the **Copy time logged** check box.
5. Click **OK**.

Result

Time cards for project tasks

Time cards for all the project tasks that are in progress or planned in the current week are copied from the selected time sheet. If a time card for a project task exists, a duplicate time card is not created during copying.

Time cards for non-task category

Time cards for all non-task category such as meetings and trainings are copied from the selected time sheet. If a time card for a non-task category exists, a duplicate time card is created during copying.

Note:

- If the previous time sheet has rate types and the time sheet policy of the user allows rate types, then rate types are also copied into the current time sheet.
- If the previous time sheet has rate types, but the time sheet policy of the user no longer allows rate types, then rate types are not copied to the current time sheet.
- If the previous time sheet has a rate type that is inactive, that rate type is not copied. If necessary, the user can enter a different rate type before saving the individual time cards.

Auto-generate time cards

As an admin, you can configure a scheduled job to generate time cards automatically for project tasks assigned to time card users.

Before you begin
Role required: admin

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About this task

In addition to the manual option **Generate Time Cards**, a scheduled job can be run to automatically generate the time cards for project tasks. A job can be scheduled to run every week, for example, on every Sunday to generate time sheets for all users for the next week. You can configure when to run the scheduled job based on the business process of the organization. By default, the scheduled job is turned off. For more information, see Schedule a script execution .

Note:
The scheduled job auto-generates time cards only for those users who have the **Auto create time cards every week** option set to true in their assigned time sheet policy.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. In the Scheduled Jobs list, select **Auto Generate Time Cards**.
3. Configure the following parameters in the script as per the business requirements:
   - run for (CURRENT_WEEK, NEXT_WEEK, LAST_WEEK)
   - Group Name (includeGroups, excludeGroups)

Note:
- If a time card exists for a project task for the time card week, a duplicate time card is not created.
- Time cards are generated only for those project tasks that are in progress or planned in that week.
- The **Allow time card reporting on** field on the project form determines the level that the time cards for the project tasks are created at.

Example:

The following example script is executed when a scheduled job is run to generate time cards for the `Current week` for the `Database` and `Hardware` groups:

```
// Clone this schedule job to run separately for different
 groups at different times
// One of the following values
// TimeCardConstants.CURRENT_WEEK
// TimeCardConstants.NEXT_WEEK
// TimeCardConstants.LAST_WEEK
var runFor = TimeCardConstants.CURRENT_WEEK;

// Comma separated group sys ids or group names.
 TimeSheet/TimeCards will be auto generated for time card users
 in the given groups.
var includeGroups = [Database,Hardware];
var excludeGroups = [];

var generator = new TimeCardGenerator();
generator.generateFromConfig(runFor, includeGroups,
 excludeGroups);
```

Submit a time card

As a time card user, once a time card for the week is updated with the time worked, you can submit the time card individually.

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Before you begin

- A time card in the Pending or Rejected state can be submitted.
- Role required: timecard_user

About this task

When a user submits a time card, the time sheet policy assigned to the user is used for validation. If there's no time sheet policy assigned to the user, the default time sheet policy is used. Business rules help prevent a user from submitting a time card in case any violation is found.

Procedure

1. Navigate to **All** > **Time Sheets** > **My Time Sheets** > **All**.
2. Select the time sheet that you want to submit the time card for.
3. In the Time Card related list, open the time card to submit.
4. Select **Submit Time Card**.

> **Note:**
> Submit multiple time cards by selecting **Submit Time Card** from the actions on selected rows menu.

Result

- The time card moves to the Submitted state.
- The time card is submitted to an approver based on the **Project time approver** and **Non-project time approver** field values in the assigned time sheet policy.

> **Note:**
> If the project or user manager is changed after submitting the time card, the time card is automatically redirected to the new project or user manager for approval.

Approve or reject a time card

As a time card approver, you can view and approve or reject a submitted time card.

Before you begin

Role required: timecard_approver or timecard_admin

About this task

You can view only those time cards that are submitted to you for approval or you have been delegated as the time card approver by one of the other user managers. The time sheet policy assigned to the user governs the approval process.

Procedure

1. Navigate to **All** > **Time Sheets** > **Time Cards** > **Pending Approval**.
2. Select the time card to approve or reject.
3. Click **Approve** or **Reject**.

Result

- The time card moves to the Approved or Rejected state.
- Expense line is created for an approved time card.
- For an approved time card, a Time Card Daily record is created.

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Note:

- A user manager can also approve the time cards within a time sheet by selecting one or more time cards and approving them. When all the time cards in a time sheet are approved, the time sheet automatically moves to the Approved state.

  A user manager is one who is selected in the **Manager** field on User form of the time card user.

- If a time card is in the Rejected state, the associated time sheet also moves to the Rejected state irrespective of the state of other time cards in the time sheet.

  Note:
  If a time sheet is rejected, it gets listed in the notifications for the rejected time sheets under notifications icon on Time Sheet Portal.

- If **Project time approver** is set to **Both** in the assigned time sheet policy, the time card is in the Submitted state only if both approvers approve it. If one of the approver rejects, the time card state is set to Rejected and the **Approved by** field is cleared, requiring approval of both approvers on resubmission.

Recall a processed time card

You can recall an incorrect time card in the Approved or Processed state to return it to the submitter. The submitter can then make the necessary changes and resubmit the time card.

Before you begin

Role required: timecard_approver or timecard_admin

About this task

The recall option is available only if the **Allow recall** option is selected on the associated time sheet policy.

Procedure

1. Navigate to **All** > **Time Sheets** > **Time Sheet Portal**.
2. Click the **My Time Sheet** list and select a user under **My Resources**.
3. Navigate through the **Calendar** widget to select the time sheet.
   The time sheet must be within the recall period specified in the time sheet policy.
4. To recall a time card, click the more actions icon ( ) and select **Recall**.
   If the cost type for a cost plan is updated before recalling a time card, the expense line of the recalled time card will have the new expense type. For example:
   a. A Time card is processed with Cost Plan=Labor Opex, an expense line is generated for $500 with Expense type=Labor Opex.
   b. If the cost type of cost plan is updated to Cost type=Labor Capex.
   c. If a time card is recalled, the recalled expense linewill have Expense type=Labor Capex.

Result

- Changes the state of the time card to **Recalled**. The state of the associated time sheet also changes to **Recalled** until all time cards in the time sheet are approved or processed again.
- Reverts the actual effort and resource hours in a project or demand created when the time card for a task type was approved.

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- Creates negative expense lines to zero out the corresponding expense lines created when the time card was approved.
- Returns the associated time sheet to its submitter for modifications.

Map a time card category with operational work types

Map custom time card categories with operational work types so you can select only the operational resource plans that are associated with the user for a specific time card period and category while posting time.

Before you begin

Role required: pps_admin

About this task

By default, all base system time card categories are mapped with the base system operational work types. If mapping is not done for custom categories, the **Resource Plan** field displays all the operational resource plans associated with the user for that time period when you create a time card.

During time card creation, after you select a time card category and task or during time sheet submission for other category time cards, operational resource plans are populated for that category and task as described in the following table.

Operational resource plans for tasks and categories

Category	Task	Resource Plan
• Admin • External labor • Meeting • Phone call • Training • Out of office • Appointment • Time off • KTLO	Task, project, demand, project task, or demand task, or no value is selected in the **Task** field.	Displays the resource plans associated with the task, project, demand, project task, or demand task when a task is selected. If no resource plans are associated with the selected task, or no task is selected, then the mapped operational resource plan for that operational work type for that category is displayed.
Custom	Any of the task/project/ demand/ project task/ demand task	Displays the resource plans associated with the task, project, demand, project task, or demand task when a task is selected. If no resource plans are associated with the selected task, or no task is selected, then the mapped operational resource plan for that custom operational work type for that category is displayed.

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Operational resource plans for tasks and categories (continued)

Category	Task	Resource Plan
		If mapping is not done, then all the operational resource plans are displayed.
Other category (custom and OOTB) from Time Sheet Portal	N/A	Displays the mapped operational resource plans. If mapping is not done, then all the operational resource plans are displayed.

Procedure

1. Navigate to **All** > **Project Administration** > **Time Card Category Mapping**.
2. Click **New**.
3. From the **Time card category** menu, select the required time card category.
4. From the **Operational work type** menu, select the operational work type you want to map to the time card category you selected in the previous step.
5. Click **Submit**.

Record time worked

The time card retrieves time accrued on a project or spent working on any record in the Task table from the **Time worked** field.

This field does not appear by default on the Project Task, Incident, Problem, and Change forms and must be added by personalizing the form. Time recorded in this field is used to populate an existing time card or to create a new time card if one does not exist. A time sheet policy controls this behavior.

Note:

When time worked is updated, a time card is created only if:

- the user is a time card user, AND
- the user is assigned to the task through **Assigned to** or **Additional assignee list** field.

The *Time worked* field has a counter that acts like a stopwatch for the duration of the time spent in the record. A button in the field can stop and start the counter. By default, the *Time worked* counter is enabled and begins recording the elapsed time when the record is opened. Stop the counter with the stop button and restart it with the play button.

If you are creating time cards from time worked entries, you can ask your admin to add the **Time Worked** related list to display the time worked records on the time card form. You will also notice an informational message on the time card to let you know that changes to time worked records overrides values in the time card. This is displayed using a Create a formatter and add it to a form, which can be added or removed by configuring the form.

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Manage costs

When the cost management feature is enabled, time cards can be used to manage the cost of labor in the Cost Management application.

When a time card for a project task is approved, an expense line is generated for the corresponding labor cost associated with the project. If the project has a Rate Models associated, then the hourly rate for calculating labor cost for the expense lines is derived from the rate model. If no rate model is associated to the project, the rate listed in the *Labor Rate Card* is considered. If no Labor Rate Cards is applicable, the property `com.snc.time_card.default_rate` defines the default hourly rate.

Roles

The timecard_admin role enables users to approve, modify, and delete the time cards of other users.

Related topics

Activate Cost Management

Analytics Project manager

The Analytics Project manager provides the project managers with quick reports of time card exceptions, and category wise time reported for their projects. The dashboard displays time card reports only for the projects managed by a project manager.

Important:
Starting with Xanadu release, **Project Manager Dashboard** is renamed to **Analytics Project manager** for new customers.

The dashboard can be activated using the Performance Analytics - Content Pack - Project Portfolio Suite Dashboards plugin (com.snc.pps_dashboards). You require Performance Analytics license to use this dashboard.

The reports in the dashboard are filtered based on **Project**, and **Date** selected.

The Analytics Project manager consists of these components:

Project time card exception count

It displays the total count of entries in **Project time card exceptions** report.

Project time card exception count



Project time card exceptions report

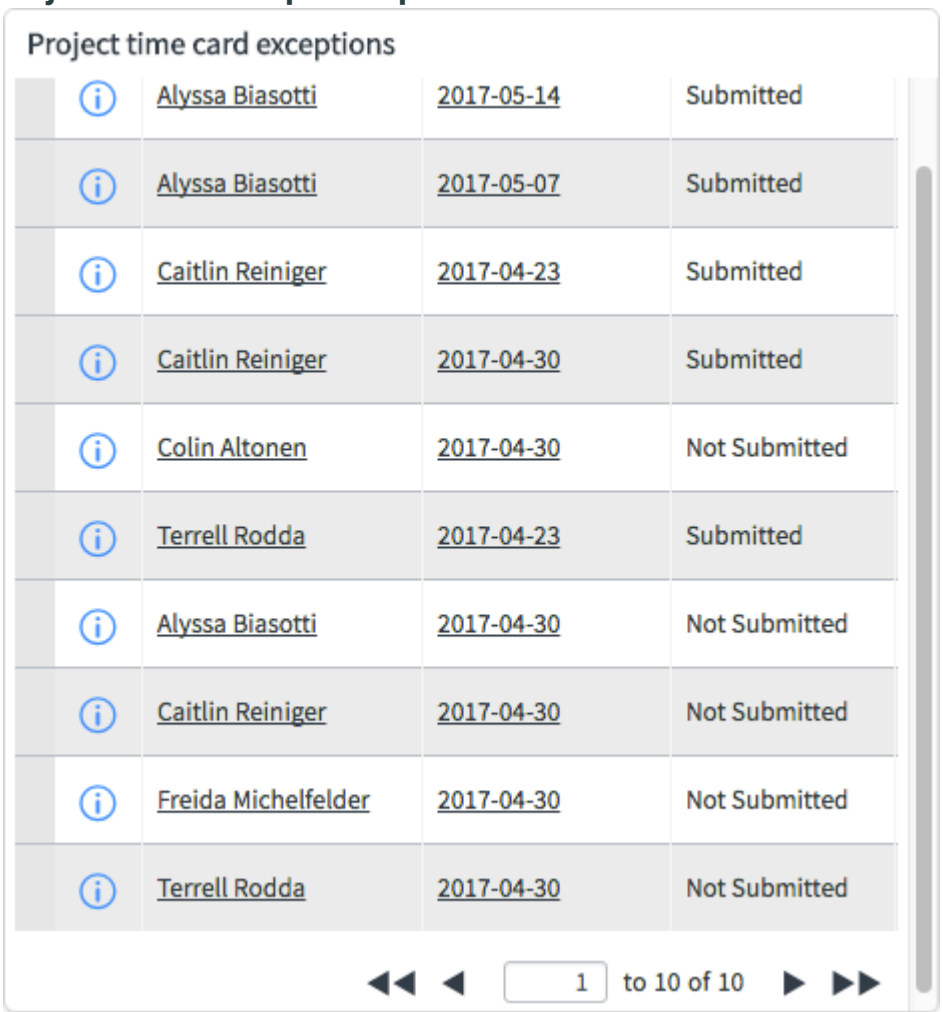
The Project time card exceptions report lists the users who did not submit their time cards, and the time cards which are not yet approved for the selected project and time range. The exception report is generated for the users who are assigned to a task in progress, or hard allocated to the project/task in that time range. The report displays the following data:

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- **User**: The time card user assigned to the selected project, or hard allocated to the resource plan associated with the project. If there are more than one time cards for a user in a given date range which are not submitted or require approval, then multiple entries are listed for the user.
- **Week starts on**: Starting date of the time card week in the selected time range.
- **State**: State of the time card. Time card entries with state as **Not Submitted** are also listed if a time card is not created for the week.

The report is generated from the project_timecard_exception table. It requires the schedule job **Project Time Card Exceptions** to be running to get the up-to-date information.

Project time card exceptions report

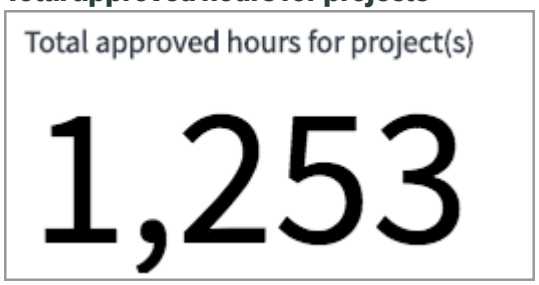


Total approved hours for project(s)

It displays the total approved hours in all project categories displayed in **Time by Project Time Category** report.

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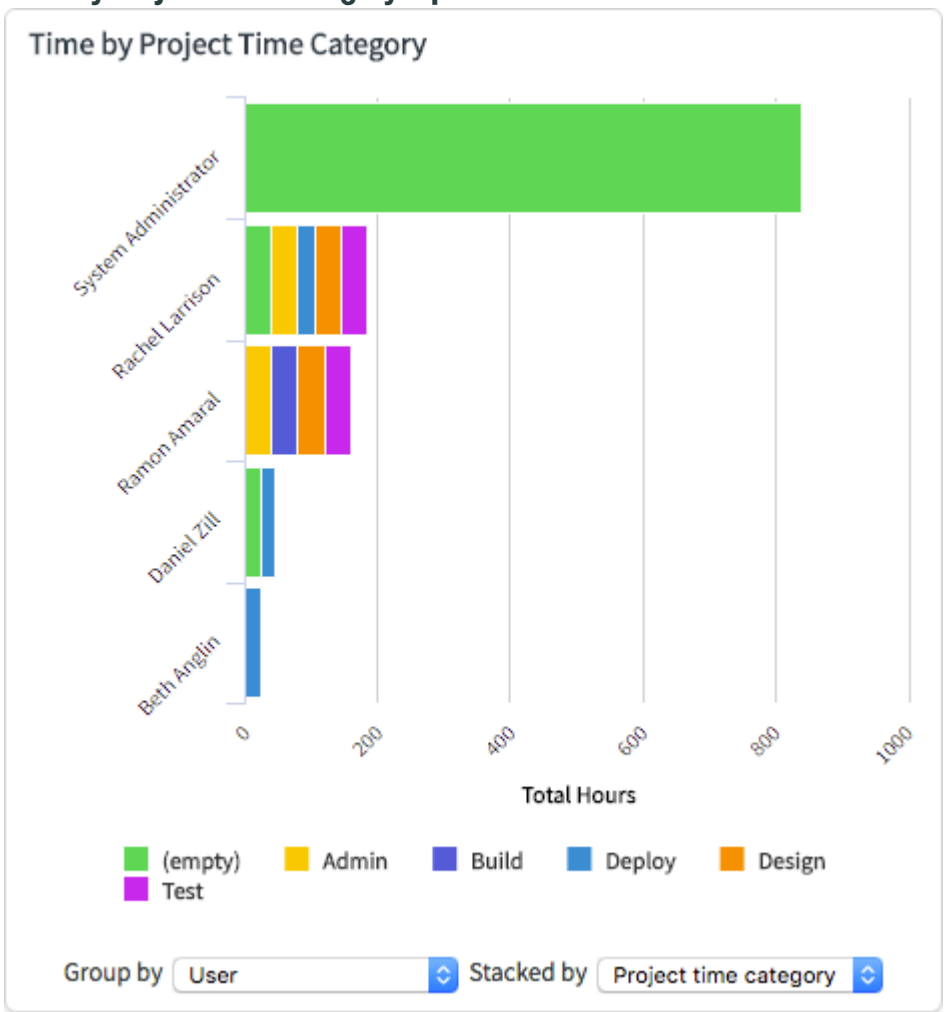
Total approved hours for projects



Time by Project Time Category report

The bar chart report displays the time approved against each project category for the users allocated to the selected project.

Time by Project Time Category report



Use the Analytics Project manager

The Analytics Project manager shows the time card reports for the selected projects.

About this task

Important:
Starting with Xanadu release, **Project Manager Dashboard** is renamed to **Analytics Project manager** for new customers.

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Before you begin

Role required: it_project_manager, timecard_admin

Procedure

1. Navigate to **All** > **Time Sheets** > **Analytics Project manager**.
2. Select a project and date range from the **Project** and **Date** choice lists.
3. Review the displayed reports and take necessary actions, if required.
4. Click the more actions icon (⋮) to duplicate, share or export the selected report, if required.

Analytics User manager

The Analytics user manager provides the user managers with reports of time sheet exceptions, and category wise time reported by the users.

Important:
Starting with Xanadu release, **User Manager Dashboard** is renamed to **Analytics User manager** for new customers.

The dashboard can be activated using the Performance Analytics - Content Pack - Project Portfolio Suite Dashboards plugin (com.snc.pps_dashboards). You require Performance Analytics license to use this dashboard.

The dashboard displays time sheet reports only for those time card users who have the **Manager** field on User form set to the current user.

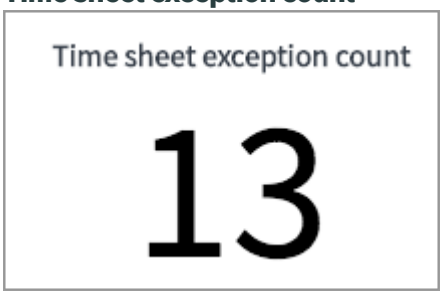
The reports in the dashboard are filtered based on **Date** range, and **User** selected.

The Analytics user manager consists of these components:

Time sheet exception count

It displays the total count of entries in **Time sheet exceptions** report.

Time sheet exception count



Time sheet exceptions report

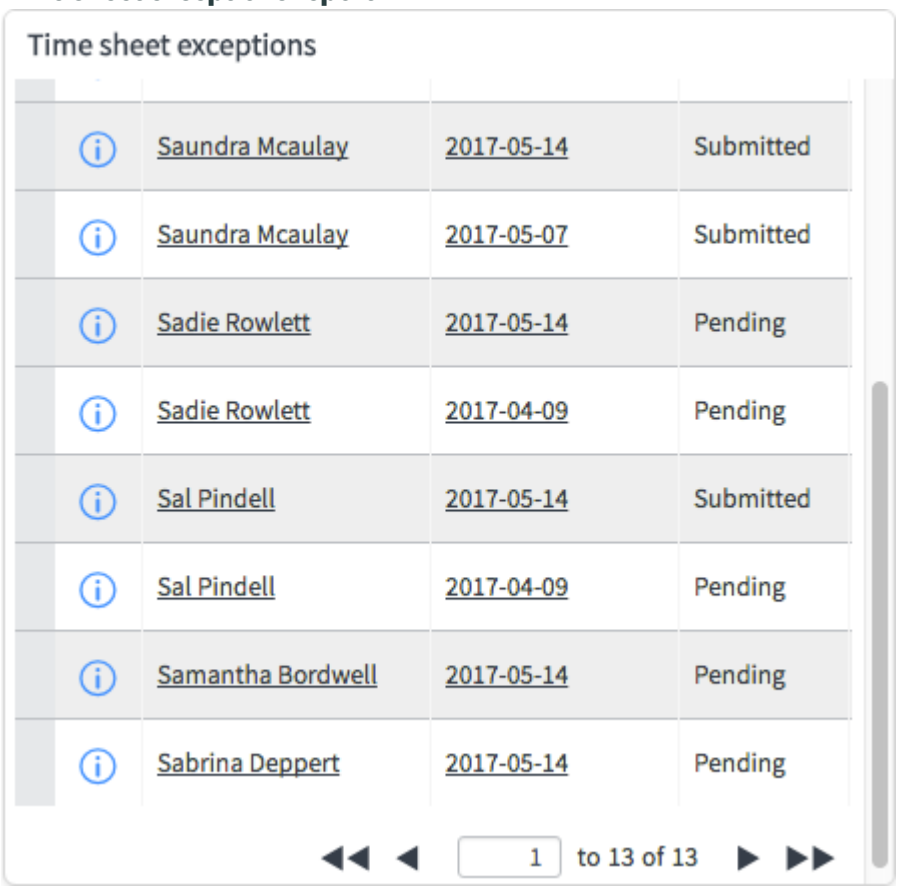
The Time sheet exceptions report lists the users who did not submit/create their time sheets, and the time sheets which are not yet approved for the selected user, and time range. The report displays the following data:

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- **User**: The time card user whose manager in User profile is the current user. If there are more than one time sheets for a user in a given date range which are not submitted or require approval, then multiple entries are listed for the user.
- **Week starts on**: Starting date of the time sheet week in the selected time range.
- **State**: State of the time card. Time sheet entries with state as **Not Submitted** are also listed if a time sheet is not created for the week.

The report is generated from the time_sheet_exception table. It requires the schedule job **Time Sheet Exceptions** to be running to get the up-to date information.

Time sheet exceptions report



Total approved hours

It displays the total approved hours in all categories displayed in **Time by category** report.

Total approved hours

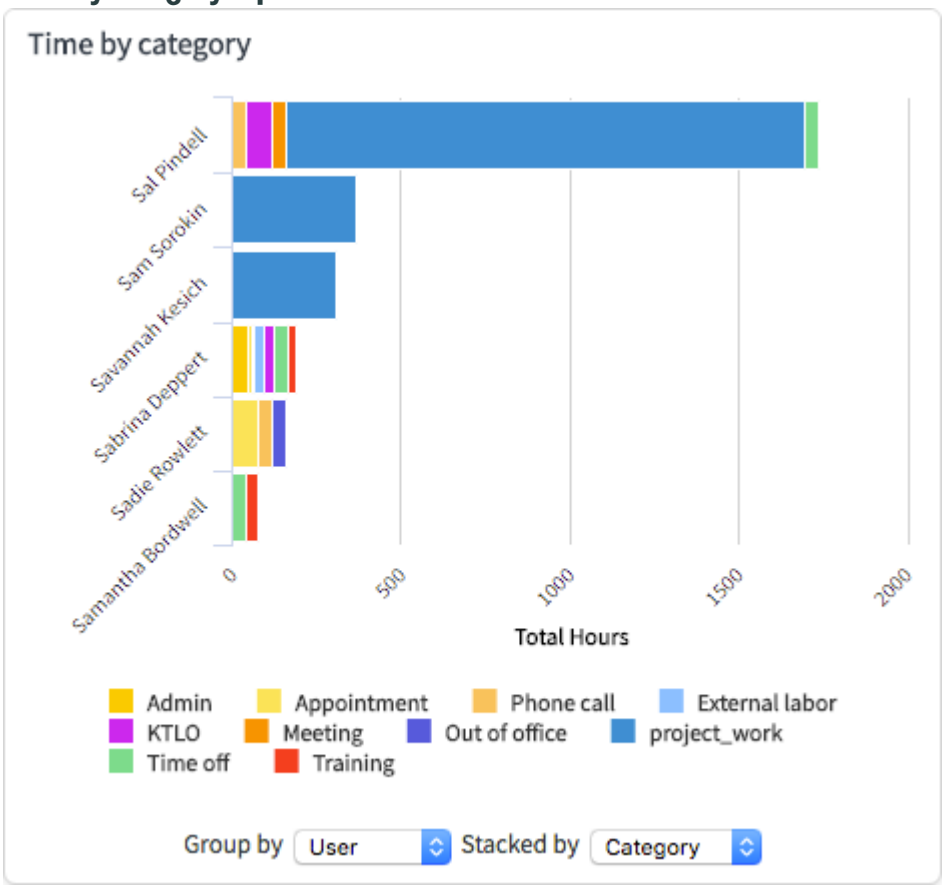


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Time by category report

The bar chart report displays the time approved against each category for the selected users whose manager in User profile is the current user.

Time by category report



Use the Analytics User manager

The Analytics User manager shows the time sheet reports for the users.

Before you begin

Role required: resource_manager, timecard_admin

About this task

> **Important:**
> Starting with Xanadu release, **User Manager Dashboard** is renamed to **Analytics User manager** for new customers.

The dashboard displays time sheet reports only for those time card users who have the **Manager** field on User form set to you.

Procedure

1. Navigate to **All** > **Time Sheets** > **Analytics User manager**.
2. Select a date range and user from the **Date** and **User** choice lists.
3. Review the displayed reports and take necessary actions, if required.

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Performance Analytics dashboard for Time Card Management

This Platform Analytics Solution contains preconfigured dashboards. These dashboards contain actionable data visualizations that help you improve your business processes and practices.

The Time Card Management and Time Sheet dashboards are included in the Project Portfolio Suite with Financials Dashboards. For more information, see Project Portfolio Management Platform Analytics Solutions.

Domain separation and Time Card

Domain separation is supported in Time Card. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

For more information about using domain separation with Time Card, see https://community.servicenow.com/community?id=community_article&sys_id=616d706edbb318d066f1d9d9689619c1.

Related topics

Domain separation for service providers

Mobile Time Sheets

The ServiceNow® Mobile Timesheets app enables time sheet users and managers to access their time sheets from a mobile device. Mobile Time Sheets is available on the Now Mobile app and is supported on iOS and Android devices.

Time sheet users can use Mobile Time Sheets to create, view, edit, enter notes, and submit their time cards from a mobile device. Time sheet project managers or user managers can view, approve, reject, or recall a time sheet or time card from a mobile device.

To access time sheets from your mobile device, you must first download the Now Mobile application on an iOS platform from the Apple App Store or on an Android platform from the Google Play Store.

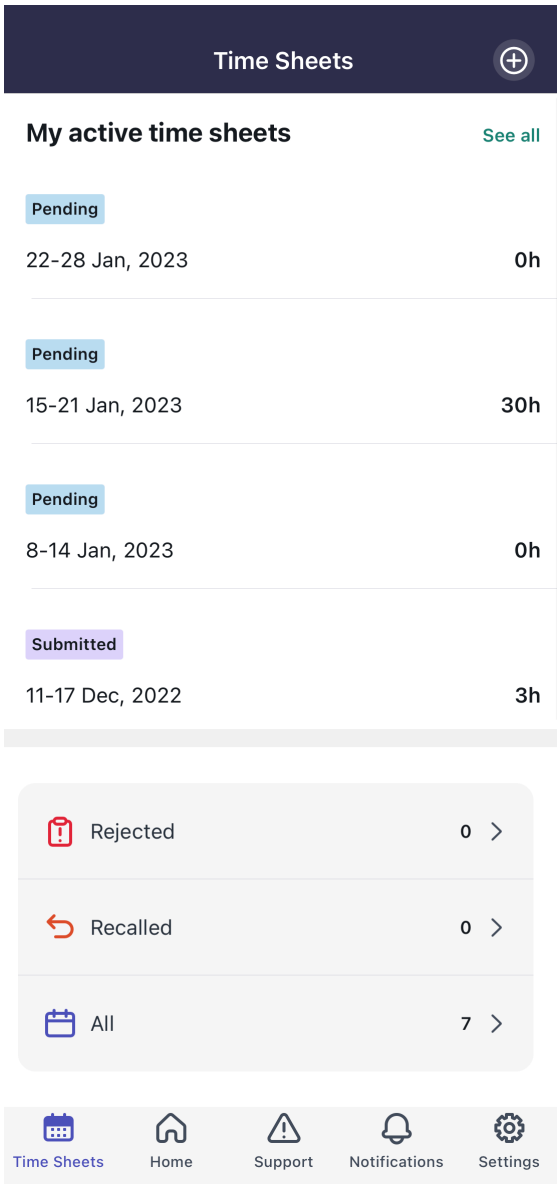
Features

The Mobile Time Sheets app provides the following capabilities to time sheet users:

- Create a time sheet
- Create a time card

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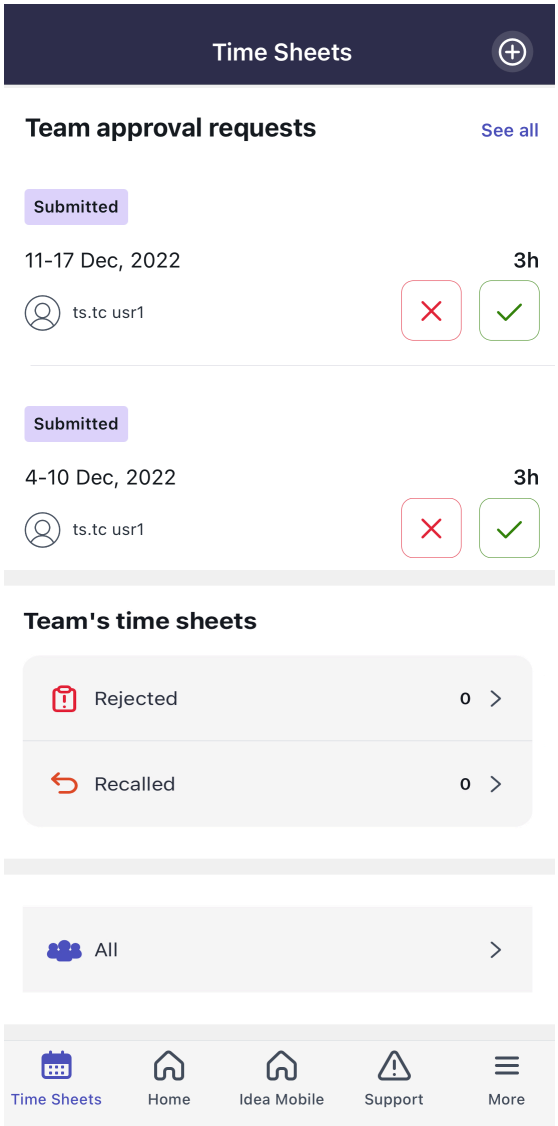
- Log hours on the time card
- Update hours for the week for a specific time card
- Add notes to your time cards
- Submit a time sheet
- Submit a time card



The Mobile Time Sheets app provides the following capabilities to resource or project managers:

- Approve or reject a time sheet
- Approve or reject a time card
- Recall a time sheet or time card

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Install Mobile Time Sheets

Install the Mobile Time Sheets application from the ServiceNow Store website.

Before you begin

Role required: admin

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the application using the filter criteria and search bar.
   You can search for the application by its name or ID. If you cannot find an application, you may have to request it from the ServiceNow store.
3. Click **Install**.
4. In the Application installation dialog box, review the application dependencies.

   If your application requires other applications, you need to install them first if they are not already installed.

   Installing your application also automatically installs dependent applications or plugins if they are not installed already.

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5. If demo data is available and you want to install it, click **Load demo data**.
   Some applications include demo data, which are sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.
6. Click **Install**.

Enabling the mobile experience for Mobile Time Sheets

Enable the mobile experience for Mobile Time Sheets so users can fill out time sheets and user managers can approve or reject them from their mobile device.

Before you begin
Role required: admin

Procedure

1. Install the Mobile Time Sheets application on your instance.
2. Download the Now mobile application on an iOS platform from the Apple App Store or on an Android platform from the Google Play Store.

   For more information on using this mobile app, see the Now Mobile app topic.
3. Add the instance that has Mobile Time Sheets installed to the Now Mobile application and log in to access the application data on your mobile device.

What to do next
Log in to an instance with a mobile app.

Use Mobile Time Sheets in Now Mobile

You can configure your platform system to use Mobile Time Sheets in the Now Mobile application. By default, Mobile Time Sheets can be viewed in the Now Mobile application.

Before you begin
Role required: admin
The Mobile Time Sheets app must be installed in your system.

Procedure

1. Navigate to **All** > **System Mobile** > **Navigation Bar**.
2. Click **Now Mobile Nav**.
3. From the **Navigation Tabs** related list, delete the time sheet record.
4. Navigate to **System Mobile > Navigation Bar**.
5. Click **Now Agent**.
6. Create a new record for the time sheet in the **Navigation Tabs** related list.
7. Download and enable the Now Mobile app.
   For more information, see the Now Mobile app topic.

Create a time sheet from your mobile device

Create a time sheet to group all your time cards for the given week and submit them in a single step from the Now Mobile application.

Before you begin
Role required: timecard_ user

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Procedure

1. Log in to your instance using the Now Mobile application.
2. Tap the plus icon located on the top-right corner.
3. In the **Select a day to create a time sheet** field, select the starting date of the week for which the time sheet is being created.
4. Tap the forward icon.

What to do next
Add time cards to the time sheet.

Search for a time sheet from time sheet lists

Search for a specific time sheet from the time sheet lists by applying filters.

Before you begin
Role required: timecard_user

About this task
You can apply filters on the time sheet lists to search for a specific time sheet in the **All**, **Rejected**, and **Recalled** groups, or while copying time cards from a previous time sheet. You can apply one or more filters while searching for a time sheet.

Procedure

1. Log in to your instance using the Now Mobile application.
2. Open the **Rejected**, **Recalled**, or **All** list.
3. Tap the **Filters** icon located on the top-right corner to specify your filter criteria.
4. From the **State** menu, select the state of the time sheet, and tap the **Back** icon.
5. Select the user assigned to the time sheet in the **Name** field.
6. Select the week on which the time sheet starts.
7. Tap **Apply**.

Add a time card and log time through the Mobile Time Sheets application

Create time cards to log time from your mobile application for the work you have done.

Before you begin
Role required: timecard_user

About this task
The **Allow time card reporting on** field on the project form determines the level at which time cards for the project tasks can be created. For example, at the project level, if a user is assigned to multiple tasks in a project, then the time spent on all the tasks is recorded under one time card only; and at the project task level, separate time cards are created corresponding to each planned task.

Procedure

1. Log in to your instance using the Now Mobile application.
2. Open a time sheet from the **Time Sheets** tab.
3. Tap the action icon.
4. Add task-related or non-task related time cards.

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5. Log time in a time card:
   - Tap a task on the time sheet and enter the hours worked for applicable days.
6. Tap **Save**.

Update time card hours for a task

Update hours in a time card for a particular day.

Before you begin
Role required: timecard_user

About this task
You can update the hour field for a specified day for a particular time card. The existing value is overwritten with the new value in the time card.

Procedure
1. Log in to your instance using the Now Mobile application.
2. Open a time sheet from **My active time sheets**.
3. Select the day for which you want to update hours.
4. Tap the task for which you want to update hours.
5. Update the hours in the text box.
6. Save the changes using your device's keyboard.

Manage your time cards

View, edit, or delete your time cards from your mobile device.

Before you begin
Role required: timecard_user

About this task
Manage your time cards by performing actions such as submitting the time card, viewing the notes, adding notes, editing resource plan, or deleting the time card using your mobile device.

Procedure
1. Log in to your instance using the Now Mobile application.
2. Open a time sheet from the **Time Sheets** tab.
3. In the **All Week** tab, tap the action menu for a task.
4. Manage your time cards.

Submit a time card from your mobile device

Once a time card for the week is updated with the time worked, you can submit the time card from your mobile application.

Before you begin
Role required: timecard_user

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Procedure

1. Log in to your instance using the Now Mobile application.
2. Open a time sheet.
   Cards that have not yet been submitted are in the Pending state. You can also submit cards that are in the Rejected state once you have fixed the issues that caused the rejection.
3. Tap the actions menu for a time card on the time sheet and select **Submit time card**.

Result

- The time card moves to the Submitted state.
- The time card is submitted to an approver based on the values set in the **Project time approver** and **Non-project time approver** fields in the time sheet policy assigned to the user.

> **Note:**
> If the project or user manager is changed after submitting the time card, the time card is automatically redirected to the new project or user manager for approval.

Submit a time sheet from your mobile device

Once you have updated the time sheet with the time you worked, you can submit the time sheet for the week to submit all the time cards for the week together from your mobile application.

Before you begin
Role required: timecard_user

Procedure

1. Log in to your instance using the Now Mobile application.
2. Open the time sheet you want to submit.
3. Submit the time sheet using one of the following options.
   - Tap the action icon and tap **Submit Time sheet**.
   - Tap **Submit time sheet** at the bottom of the screen.

   The time sheet is validated against the time sheet policy assigned to you or, if no time sheet policy is assigned, against the default time sheet policy.
   - If the time sheet meets the time sheet policy requirements, the time sheet is submitted. All the time cards associated with the time sheet are also submitted automatically and move to the Submitted state.
   - If the time sheet does not meet the time sheet policy requirements, a validation error is displayed. Resolve the issue indicated by the error message and resubmit the time sheet.

Approve or reject a time sheet or time card from your mobile device

As a user manager, you can approve or reject from your mobile device all time cards for a user in a given week in a single step by approving or rejecting a time sheet.

Before you begin
Role required: timecard_approver or timecard_admin

About this task
A user manager is the one who has either of the required roles. The manager who can accept or reject the time sheet is selected in the **Manager** field on the User form of the time card user.

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A manager can delegate another user with the required roles as the time sheet approver. For the specified time period, the delegated user also receives all the time sheets submitted by time card users to process.

Procedure

1. Log in to your instance using the Now Mobile application.
2. In the Time Sheets list, open the time sheet you want to approve or reject.
3. Approve or reject the time sheet or time card.
   - To approve time sheet of your team, from the Team approval requests section, tap the approve ( ) icon.
   - To reject time sheet of your team, from the Team approval requests section, tap the reject ( ) icon.
   - To approve the time sheet, tap the action icon, and select **Approve time sheet** or tap the **Approve time sheet** button at the bottom of the screen.
   - To reject the entire time sheet, tap the action icon, and select **Reject time sheet** or tap the **Reject time sheet** button at the bottom of the screen.
   - To approve a specific time card, tap the action menu and tap **Approve time card**.
   - To reject a specific time card, tap the action menu and tap **Reject time card**.

Result

- The time sheet moves to the Approved or Rejected state.
- All time cards associated with the time sheet are also approved or rejected automatically.
- Time cards that are of non-task type are in moved to the processed state.
- If any time cards in the time sheet are pending approval by one of the approvers, the sheet remains in the Submitted state.
- If a time card in a time sheet is in the Rejected state, the time sheet also moves to the Rejected state regardless of the state of any other time cards in the time sheet.

Track your time sheets

View and track the time sheets grouped according to the date of submission such as the current week, last week, or older.

Before you begin

Role required: timecard_approver or timecard_admin

Procedure

1. Log in to your instance in the Now Mobile application.
2. From the time sheets list, navigate to the **All** section and tap the forward icon.
3. View the time sheets in different states such as submitted, pending, approved, or recalled during the current or previous weeks.
   - To view the time sheets for the current week, tap **This week** tab.
   - To view the time sheets for the last week, tap **Last week** tab.
   - To view the time sheets for previous weeks, tap **Older** tab.

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Recall a processed time sheet or time card from your mobile device

As a user manager, you can recall an incorrect time sheet or time card that is in the Approved or Processed state to return it to the submitter. The submitter can then make the necessary changes and resubmit the time sheet or time card.

Before you begin

Role required: timecard_approver or timecard_admin

Procedure

1. Log in to your instance using the Now Mobile application.
2. From the time sheets list in the Team approvals requests section, open the time sheet you want to recall or the one that contains the time card you want to recall.
3. Recall the time sheet or time card.
   - To recall an approved time sheet, navigate to **All** time sheets section, and select a time sheet from the **This week**, **Last week**, or **Older** tab, and then tap the Recall ( ) icon
   - To recall the entire time sheet, tap the action icon, and select **Recall Time sheet** or tap the **Recall time sheet** button at the bottom of the screen.
   - To recall a specific time card, tap the action icon, and select **Recall time card**.

Financial Management

Use the ServiceNow® Financial Management application to allocate, track, and report on expenses in your organization.

Important:

Starting March 2021, Financial Modeling is no longer available for activation.

- New customers: If you do not currently have the entitlement to Financial Modeling but are interested to use it, reach out to one of the Partner Store Apps. Your ServiceNow implementation partner could help you with the Partner Store App details.
- Existing customers:
  - If you own the entitlement to Financial Modeling but have not implemented it, reach out to one of the Partner Store Apps. Your ServiceNow implementation partner could help you with the Partner Store App details.
  - If you own the entitlement to Financial Modeling and have already implemented it, you can continue using it. The ServiceNow Support team would continue to support you with the application, in the way that you have implemented it.

    Enhancements to the application in the future would be done only on the performance but not to the functionality.

Watch this five-minute video to learn more about financial planning, actual expenses, and budgeting. Information about financial planning, actual expenses, and budgeting in financial management

The application provides a workbench, which is a visual tool that you can use to extract expenses from your general ledger. You can also use it to process the expenses, and map them to the functions used by IT. Various reports are also available to help you know exactly how much of your expenditures are related to IT.

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The Financial Management application is available starting with the Fuji release. The modules in the Financial Management application prior to the Fuji release are included with IT Cost Management.

How Financial Management Works

The Financial Management application uses these components:

- The general ledger: A list of your organizational expenses.
- The fiscal period: The time frame during which expenses were incurred. You can work with only one fiscal period at a time.
- The cost models: The underlying records that tell the application how to allocate expenses to the accounts in the hierarchy of segments.
- The allocation engine: The core of the application that uses your cost model to calculate expenses and determine how to allocate expenses.
- Financial reports and dashboards: Graphical representations of the expense allocations that show you where your expenses are coming from.

With the workbench, you can choose the fiscal period, build your cost model, and run the allocation engine.

There are specific dashboards for Business Application Costing cost model that you can use to track key data relevant to your business applications.

Requirements

The following are required to use Financial Management:

- For all financial overview and dashboard reports to function properly, activate Report Charting v2 on your instance.
- If you are using Internet Explorer, use version 11 or later. You can also use any of the other generally supported web browsers.

Installed with Financial Management

Several components are installed with the Financial Management application.

Demo data is available with Financial Management. The demo data provides sample hierarchy of segments information, allocations, and expenses.

Tables installed with Financial Management

Financial Management adds the following tables.

Table	Description
Actuals Log [itfm_actuals_run_log]	Logs of actuals generated and keys generated for the associated plan definition.
Base Statement Item Breakdown [itfm_charge_item_breakdown]	Statement item breakdown definitions.
Breakdown Relationship [itfm_breakdown]	Statement item breakdown definitions.
Bucket [itfm_bucket]	Buckets used in the allocation workbench to group similar expenses.

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Table	Description
Bucket Account Allocation [itfm_bucket_account_allocation]	Bucket assignment information.
Bucket Allocation Account [itfm_bucket_allocation_account]	A reference link among buckets, accounts, and cost models.
Bucket Allocation Rule [itfm_bucket_allocation_rule]	Allocates expenses to buckets.
Budget [itfm_budget]	Final budgets.
Budget Actual [itfm_gl_actuals]	Actual expenses.
Budget Definitions [itfm_plan_definition]	Parent table for budgeting that holds the metadata such as name, budget plan year span, forecast time span, ownership, and frequency of forecasting.
Budget Forecast [itfm_budget_forecast]	All budget forecasts.
Budget Forecast Items [itfm_bf_item]	All items on the budget forecast.
Budget Keys [itfm_plan_key]	The key used to identify forecasts and plans.
Budget Notes [itfm_budget_note]	Notes for budgets that you enter in the budget variance report.
Budget Override Categories [itfm_budget_override_categories]	Categories that you use to classify budget overrides.
Budget Period [itfm_budget_period]	Budget periods.
Budget Reference Rate Configuration [itfm_fx_config]	Exchange rate / fiscal period relationships.
Budget Reference Rates [itfm_fx_rate]	The exchange rates that budgets use.
Budget Segment Map [itfm_budget_segment_map]	A relationship between segments that budgets use and a budget key.
Budget Targets [itfm_budget_target]	All budget target values.
Budget Task [itfm_budget_task]	Budget tasks.
Business Unit [business_unit]	All business units.
Cleansing Condition [itfm_cleansing_condition]	Conditions that the application automatically generates when you clean data in the workbench.
Consumption Breakdown [itfm_charge_item_breakdown_cons]	Breakdown definitions for statement items that are based on a user-defined consumption table.
Consumption Statement Item [itfm_charge_item_cons]	Showback source definitions for statement items that are based on a user-defined consumption table.
Cost Allocation [itfm_account_allocation]	An all-around view of the allocations going to and from each account.
Cost Allocation [itfm_allocation]	All allocation lines that are processed from allocations. This table holds a more detailed level of allocation lines as compared to the Cost Allocation Aggregate table.

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Table	Description
Cost Allocation Breakdown Aggregate [itfm_allocation_breakdown]	Allocation lines created based on cost allocation breakdown relationships.
Cost Allocation Group [itfm_cost_allocation_group]	Groups that can be associated with allocations.
Cost Allocation Metric [itfm_cost_allocation_metric]	Metrics that weighted and custom allocation methods use.
Cost Allocation Aggregate [itfm_allocation_aggregate]	A more brief set of allocation line data than is saved in the Cost Allocation [itfm_allocation] table.
Cost Allocation Rollup [itfm_rollup]	Rollups that the application creates when you use the workbench.
Cost Allocation Rollup Override [itfm_rollup_override]	Values that you can use to override allocation rollups.
Cost Allocation Runs Log [itfm_ca_run_log]	A log of all allocations that have been run.
Cost Model Breakdown [itfm_charge_item_breakdown_cm]	Breakdown definitions for statement items that are based on the Financial Modeling output.
Cost Model Statement Item [itfm_charge_item_cm]	Showback source definitions for statement items that are based on the financial modeling output.
Financial Data Source [itfm_data_source]	The source of the financial data: the staged general ledger or the cost plan breakdown.
Financial Data Source Field Map [itfm_data_source_field_map]	Individual fields mapped to the sources of financial data.
Financial Model [itfm_cost_model]	Financial cost models.
FM Report [itfm_report]	Finance reports.
Forecast Period [itfm_forecast_period]	Forecast periods.
General Ledger Accounts [itfm_gl_accounts]	Accounts and associated account numbers.
General Ledger Cleansed Data [itfm_gl_data_cleansed]	Expenses in the general ledger that is cleansed.
General Ledger Log [itfm_gl_log]	Log records that are created when expenses are added to the general ledger for a fiscal period.
General Ledger Staged Data [itfm_gl_data_staged]	Imported expenses that have not been cleansed or groomed.
Groomed General Ledger Data [itfm_gl_data_groomed]	Expenses in the general ledger that have been groomed.
Grooming Condition [itfm_grooming_condition]	Conditions that the application creates during the financial grooming process in the workbench.
ITCOA Definition [itfm_itcoa_definition]	Reference field mappings for cost models.
IT Shared Service [itfm_shared_service]	Services shared across the IT infrastructure.

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Table	Description
IT Shared Service Type [itfm_shared_service_type]	Categories that are associated with IT shared services.
ITFM Session [itfm_session]	Saves session information for the workbench.
Main Report Configuration [itfm_ca_main_config]	Configuration settings for the main Financial Management report.
Plan Actuals [itfm_plan_actuals]	Actual items created based on budget definition from staged source expense lines.
Plan Actual Breakdowns [itfm_ai_breakdown]	Actual amount breakdowns of the item for each fiscal period.
Plan Core [itfm_plan_core]	Meta information such as name, original plan, budget currency of a plan. itfm_plan and itfm_plan_versions extend from the table.
Plan Item Breakdown [itfm_pi_breakdown]	Breakdowns of costs for a given plan item.
Plan Item Execution [itfm_plan_item_execution]	Unit cost and its validity of plan item.
Plan Items [itfm_plan_item]	Financial details such as account number, budgeted amount, forecast amount, actual amount, and attributes associated to asset, project, catalog, and contract.
Plans [itfm_plan]	Associates a budget key and the fiscal yearly details of the plan.
Planner [itfm_planner]	Owners of budget keys.
Plan Template Column [itfm_plan_template_column]	Defines columns as template columns for budget definition.
Plan Versions [itfm_plan_versions]	Plans that are created during promotion of each plan.
Plan Viewer [itfm_plan_viewer]	Access to view the plans.
Plan Yearly Details [itfm_plan_year_details]	Yearly plan details.
Planning Data Source Field Map [itfm_plan_data_source_field_map]	Planning data source field map.
Planning Log [itfm_plan_run_log]	Planning log.
Reporting Entity [itfm_reporting_entity]	Reporting entity assigned to a user or group.
Segment Definition [itfm_ca_segment_map]	Segments specified in the hierarchy of segments.
Segment Group Accounts [itfm_group_segment_acct]	Grouped ITCOA accounts.
Segment Relationship [itfm_itcoa_hierarchy]	Relationships between segments in the segment hierarchy as defined in the Data Definition stage of the workbench.
Service Catalog Breakdown [itfm_charge_item_breakdown_sc]	Breakdown definitions for statement items that are based on Service Catalog requests.

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Table	Description
Service Catalog Statement Item [itfm_charge_item_sc]	Showback source definitions for statement items that are based on Service Catalog requests.
Service Charge Line [itfm_charge_line]	Individual showback lines.
Service Charge Line Drilldown [itfm_charge_line_drilldown]	Individual showback line drilldowns.
Service Charge Price Ratecard [itfm_sc_price_rate_card]	Showback price rate card.
Showback Statement [itfm_sb_stmt]	Showback statements.
Showback Statement Definition [itfm_sb_stmt_def]	Showback statement definitions.
Showback Statement Line Definition [itfm_sb_stmt_line_def]	Showback statement line definitions.
Showback Statement Line Unit Cost Definition [itfm_sb_stmt_line_unit_cost_def]	Showback statement line unit cost definitions.
Sibling Rollup Relationship [itfm_sibling_relationship]	Sibling segment rollup relationship definitions.
Statement Dispute [itfm_dispute]	Showback disputes.
Statement Expense Line [itfm_charge_expense_line]	Individual showback statement expense items.
Statement Expense Line Details [itfm_charge_expense_line_details]	Detailed showback expense information.
Statement Item [itfm_charge_item]	Showback source definitions.
Statement Item Drilldown [itfm_chg_item_drilldown]	Statement item drilldown definitions.
Unit Cost Metrics [itfm_segment_unit_metrics]	Unit cost metric definitions.
Unit Costs [itfm_unit_cost]	Unit cost lines generated by cost allocation.
Weight Map Run Log [itfm_weight_map_run_log]	Weight map generation log.
Weight Maps [itfm_weight_map]	Weight relationships that the application uses to calculate weighted metrics.

The application also uses this table created by the Fiscal Calendar.

Tables for the fiscal calendar

Table	Description
Fiscal period [fiscal_period]	Fiscal calendars and the periods used by fiscal calendars.

User roles installed with Financial Management

Financial Management adds the following user roles.

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Role	Description	Contains Roles
cost_transparency_admin	Has access to all Financial Modeling menus and modules.	• cost_transparency_analyst • cost_transparency_owner
cost_transparency_user	Has read-only access to general ledger and allocation records.	none
cost_transparency_analyst	Has access to the Financial Modeling module and the workbench.	cost_transparency_user
sn_itfm_read	Access to view FM APM dashboards provided by the base system and the underlying tables from where the data for the dashboards are retrieved. View Financial Management Application TCO dashboard, Costing for Business Applications dashboard, CIO dashboard.	• pa_viewer • cmdb_read
service_charging_analyst	• Can create, update, delete, and view charge items. • Can create, update, delete, and view charge item breakdowns. • Can create, update, delete, and view charge item drilldowns. • Can create, update, delete, and view showback statement definitions. • Can create, update, delete, and view showback statement line definitions. • Generate and publish the showback statements.	
service_charging_owner	• View charge items. • Access the service charging console to review and set the pricing policies. • Review the charge item drilldown with the available breakdowns and drilldowns.	
showback_user	• View the showback statements. • Accept the showback statements.	

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Read-only roles for Financial Management

You can restrict the level of access of your users with a read-only role that enables them to view the Financial Management (FM) dashboards. Users with the read-only role can view FM reports and the underlying tables that provide data.

Plugin information

If you are a new customer, the Read only roles for PPM Standard (com.snc.pmo_read_roles) plugin is activated on zBoot. However, you also require Financial Management For APM (com.snc.financial_management_for_apm) plugin, which activates Performance Analytics – Content Pack – Financial Management for Application Portfolio Management (com.snc.pa.fm.apm) plugin. With this plugin you can access the FM APM dashboards.

Why read-only roles for FM

Read only roles for Financial Management (sn_itfm_read) is available when Read only roles for PPM Standard plugin (com.snc.pmo_read_roles) is activated. Users with this role can access dashboards and view reports in Financial Management for Application Portfolio Management. To assign user roles, including read-only roles, see assign a role to a user.

Dashboards accessible to users with FM read role

Following are the dashboards available for users with the read-only role:

- Financial Management Application TCO dashboard
- Costing for Business Applications dashboard
- CIO dashboard

Tables accessible to users with FM read role

Following are the Financial Management tables that the users with the FM read role can access:

FM tables

Label	Table name
Cost Allocation Aggregate	itfm_allocation_aggregate
Cost Allocation	itfm_allocation
Financial Model	itfm_cost_model
Bucket	itfm_bucket
Segment Definition	itfm_ca_segment_map
IT Shared Service	itfm_shared_service
Cost Allocation Breakdown Aggregate	itfm_allocation_breakdown

Domain separation and Financial Management

Domain separation is unsupported in Financial Management. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

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Support level: No support

- The domain field may exist on data tables but there is no business logic to manage the data.
- This level is not considered domain-separated.

For more information on support levels, see Application support for domain separation.

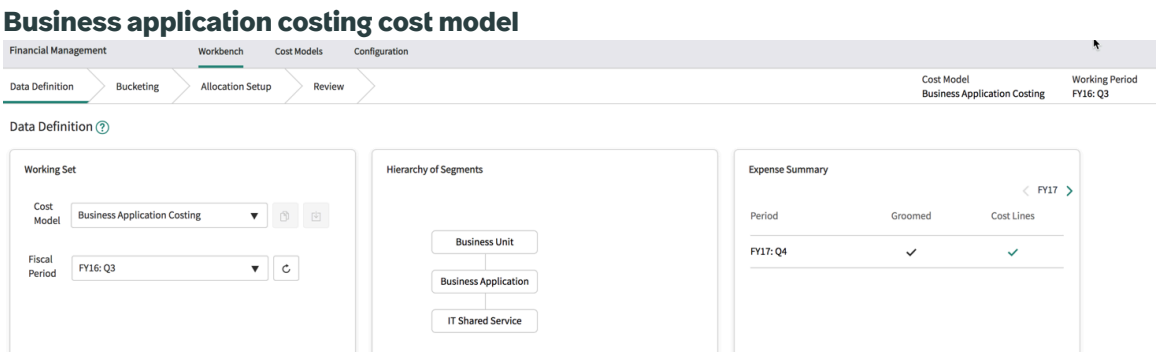
Related topics

Domain separation for service providers

Financial Management for licensed APM users

If you are an Enterprise Architecture (formerly Application Portfolio Management) licensed user and using Financial Management, then the base system provides you with a Business Application Costing cost model that you can use to evaluate the cost of your business applications along with its prescribed metrics.

Business Application Costing cost model



The specifications of the Business Application Costing cost model are:

- The cost bucket layer is tied to the ITFM bucket table [itfm_bucket] and the cost buckets are specific to the model.
- IT shared service segment accounts are sourced from the IT shared service table [itfm_shared_service].
- Business application segment accounts (the middle layer in this model) are sourced from the Business Application [cmdb_ci_business_app] table. This table is the source of accounts to the applications segment. Or, it can be Application [cmdb_ci_appl] table or other custom tables.
- The business unit layer is tied to the platform business unit table [business_unit].
- There is no data source to this cost model, which means that you should enter the spend information directly into the model and not come from the general ledger. Using the general ledger as a source of spend information is an optional feature that you can configure. See Prerequisites to modify data source of a cost model for more information.

Seeded IT Shared Services

IT Shared Service: End User Compute

IT Shared Service: Equip End Users is a cost collection container that holds any money spent on providing the end users with personal (not shared) devices, the software that runs on these devices, and the support associated with making and keeping those devices functioning. This container excludes major device upgrades,

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lease cycle turnover, and other replenishment-related costs, which are captured within the Facilitate Ongoing Change container.

IT Shared Service: Database

IT Shared Service: Facilitate Configuration Change is a cost collection container that holds money spent on supporting the ITSM Change, Release and Configuration Management processes. That is, any dollars spent on managing ongoing, daily, common, and ad-doc configuration changes. This includes activities like patching (non-security related), firmware updates, hardware/software configuration setting changes, installation, de-installation, and upgrade of hardware components, and general add, move, or change requests across the IT landscape. This container excludes major upgrades and changes across a large portion of the environment for which a project plan and/or funding would need to be secured.

IT Shared Service: Network

IT Shared Service: Facilitate Connectivity is a cost collection container that holds any money spent on providing all device network connectivity to the company, its computing and/or knowledge assets, the hardware and software to do it, and the support associated with making (and keeping) the access up. This includes all personal and enterprise devices. This container excludes monitoring hardware, software, and personnel costs, which are captured in the Monitor the Environment container.

IT Shared Service: IT Management

IT Shared Service: Management and Overhead is a cost collection container that holds any money spent on IT executive compensation, as well as one-time charge items that apply to the existence of IT operations, compliance or audit costs, and otherwise uncategorised costs. This container excludes any costs captured or accounted for in any of the other IT process definitions.

IT Shared Service: Data Center

IT Shared Service: Monitor the Environment is a cost collection container that holds the money spent on supporting the ITOM Event Management process; that is, any dollars spent on monitoring the entire IT landscape. This includes endpoint connectivity speeds, endpoint application performance testing, hardware/software/network/storage threshold checking, and fault and event correlation management tools used by operations management personnel. This container excludes security specific and/or cloud monitoring services mentioned in other process areas.

IT Shared Service: IT Operations

IT Shared Service: Perform Upgrades/Maintenance is a cost collection container that holds money spent supporting the ITSM Change, Release and Configuration Management processes. That is, all dollars spent on managing major upgrades, either project planned and/or specifically funded. This includes activities such as widespread OS upgrades; hardware replacement cycle activities; and internal or third-party business or IT management software package release updates across the IT landscape. This container excludes ongoing, daily, common, and ad-doc configuration changes that only require a change ticket to be executed.

IT Shared Service: Service Desk

IT Shared Service: Provide Tech Support is a cost collection container that holds money spent supporting the ITSM Incident, Problem and Knowledge Management processes. That is, any dollars spent on providing technical support services to end users across the organization. This includes tier 1, 2, and 3 personnel, incident or problem management software, root cause analysis time, routine or ad-doc assistance (password resets, how to Q&A), and/or standard operating procedure guidance. This container excludes actual configuration changes to end user and/or corporate assets performed by way of documented change tickets.

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IT Shared Service: Application

IT Shared Service: Run Business Applications is a cost collection container that holds any dollars spent on ongoing personnel time to keep business applications operating. This includes resources dedicated to applications and excludes IT or infrastructure operation costs.

IT Shared Service: Security & Compliance

IT Shared Service: Secure the Environment is a cost collection container that holds money spent on supporting the Security Operations. That is, any dollars spent on providing information security across the corporate IT landscape. This includes individual user endpoint devices, cloud applications, cloud computing, and/or on-premise computing resource of all types in addition to all desktops, laptops, smart phones, network gear, servers, databases, and applications. This excludes the physical security costs associated with datacenters, and office space card readers.

IT Shared Service: Storage

IT Shared Service: Store and Manage Data is a cost collection container that holds any dollars spent on the underlying tools and foundational activities related to the management of structured and unstructured data (for example, encryption, backups, purging, archiving, migrations, and DR replication) and/or storage capacity (for example, reorganizations and excess capacity acquisition). It includes these types of activities and all the people power used to ensure the health of the data and storage landscape. This container excludes elements related to local storage on end user devices utilized by single individuals and specific activities, and allocated storage that can be related to specific applications or systems.

IT Shared Service: Compute

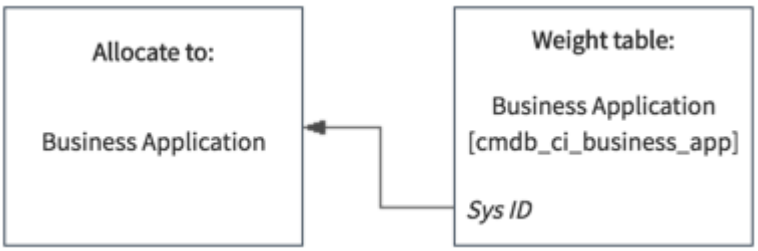
IT Shared Service: Supply Computing Power is a cost collection container that holds any dollars spent on providing foundational elements that exist, cost money to maintain, but may never actually be used such as disaster recovery facilities or contracts, hardware spares inventory, on-premises UPS systems, and generators. It also includes daily active data center costs related to things such as space, power, and cooling.

ITFM prescribed metrics

Allocate to Application based on Active User Count

The metric allocates shared service cost to applications based on the following weighted metric:

Allocate to Applications using active user count



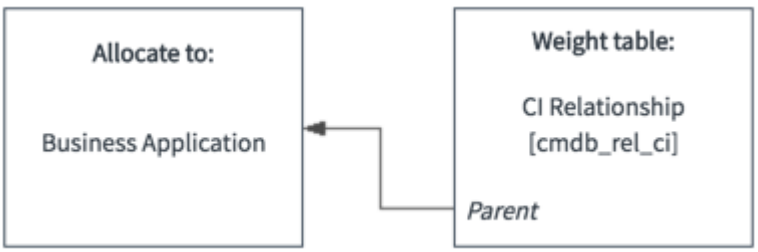
- The Business Application [cmdb_ci_business_app] table provides a list of all business applications.
- The prescribed metric performs a sum of active users and weights the costs accordingly to the receiving applications by **Sys ID**.

Allocate to Application based on Compute Power

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The metric allocates shared service cost to applications based on the following weighting table:

Allocate to Application based on Compute Power

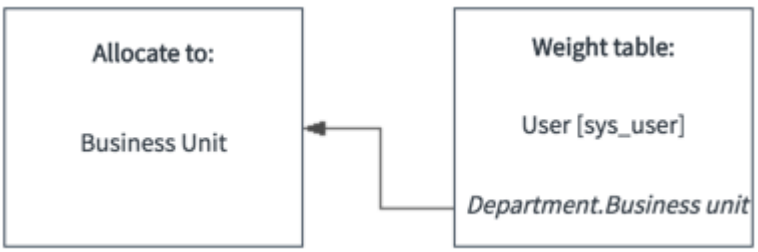


- The CI Relationship [cmdb_rel_ci] table provides a list of all relationships between configuration items.
- The prescribed metric performs a count of configuration items where the Child.Class = Server and weights the costs accordingly to the receiving applications.

Allocate to Business Unit on Headcount

The metric allocates shared service cost to business unit based on the following weighting table:

Allocate to Business Unit on Headcount



- The User [sys_user] table provides a list of all system users and their related department.
- The Department [cmn_department] table provides a list of all departments and their related business unit.
- The prescribed metric performs a count on the number of users per business unit and weights the costs accordingly.

  Filter criteria: Only count active users.

Dashboards for Business Application Costing cost model

There are three performance analytic dashboards that you can access with Business Application Costing cost model. They are:

- Application TCO dashboard.
- Business Application Costing dashboard.
- CIO Dashboard for Business Applications. CIO Dashboard for Business Applications.

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Configure business application costing cost model

Configure the business application costing cost model to allocate expenses and generate bucket cost lines for the fiscal periods to suit your requirements.

Before you begin

Role required: cost_transparency_analyst

Procedure

1. Navigate to **All** > **Financial Modeling for APM** > **Business Application Costing Model**.

   The field values in the Financial Model – Business Application form are pre-populated. You can choose to enter a model owner and user group for the Business Application Costing cost model. There is no data source for this cost model.

2. On the form, update the required fields.

Financial Model – Business Application Costing form

Field	Description
Name	Name of the cost model.
Description	Short description of the cost model.
Model Owner	User who owns the cost model.
Data Source	Source of data for the cost model. This cost model has no data source, hence the field is non-editable.
User Group	Group of users who can access the cost model.
Include Sub-Bucket info	Option to show sub-bucket information. If selected, the generated cost lines and breakdown lines hold sub-bucket information.

3. Click **Update**.
4. To run cost allocations, click **Allocate Expenses** button.

   Note:
   If you are a non-analyst licensed customer, ensure that the number of accounts in each segment and the total number of accounts in the cost model is within the threshold values 4000 and 12000 respectively.

   Use this option to run cost allocation from the cost model form and not necessarily from the workbench.

   a. Select the fiscal period in the Allocate Expense dialog box.

   b. Click **OK**.

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The allocation engine runs to generate cost allocations for the selected fiscal period. The engine does cleansing and bucketing. It allocates the expenses and creates allocation lines. However, if the cost model has no data source, the engine ignores the cleansing and bucketing stages and creates allocation lines.

5. To generate cost lines for leaf buckets associated to the cost model, click **Generate Bucket Cost** button.

   Use this option to generate bucket amount lines for this cost model that has no data source. Cost lines are generated for each leaf bucket that has no further sub-buckets. Even if there is no amount in the bucket, the amount lines are generated in the Groomed General Ledger Data [itfm_gl_data_groomed] table, populating zero in the **Amount** column. The table displays the bucket, sub-bucket, and amount associated with the cost model for the fiscal period that you selected.

   a. Select the fiscal period in the Generate Bucket Cost dialog box.

   b. Click **OK**.
      - If there is no amount in a bucket, the allocation engine still generates a groomed line with zero expense for the selected fiscal period of the cost model.
      - If there are pre-existing groomed lines with amounts in buckets for that fiscal period, then the engine does not overwrite those cost lines.

   You can edit the **Amount** column to enter the amount for each sub-bucket.

6. To view the bucket amounts, navigate to **Financial Modeling for APM** > **Bucket Amounts**.

   For more information, see Create groomed lines for cost models with no data source.

7. To view the buckets associated to this cost model, navigate to **Financial Modeling for APM** > **Buckets**.

   For more information, see Create an account bucket.

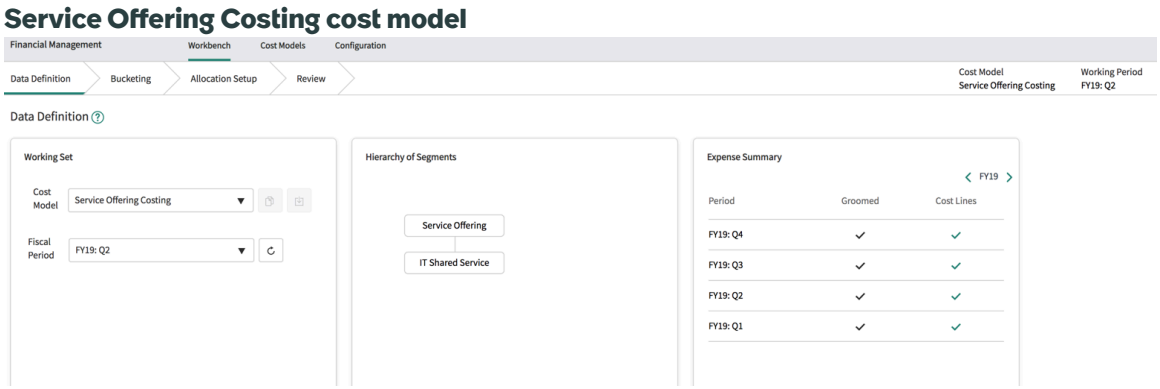
8. To access the dashboards available for this cost model, navigate to **Financial Modeling for APM** > **Financial Modeling for APM Dashboards**.

Financial Management for licensed SPM users

If you are a Strategic Portfolio Management (SPM) user and have activated Financial Management, then the base system provides you with a Service Offering Costing cost model. Use this cost model to evaluate the amount spent at each level of service. Financial Modeling allocates expenses and generates cost lines based on the level of service for a defined price.

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Service Offering Costing cost model



The specifications of the Service Offering Costing cost model are:

- IT shared service segment accounts are sourced from the IT shared service [itfm_shared_service] table.
- Service Offering segment accounts are sourced from the Service Offering [service_offering] table.
- IT Shared Service segment rolls up to the Service Offering segment. However, there are no default rollup overrides.
- All sub-buckets are spread equally to all accounts in IT Shared Services provided by the base system setup.
- There is no data source to this cost model, which means that you should enter the spend information directly into the model and not come from the general ledger. Using the general ledger as a source of spend information is an optional feature that you can configure. See Prerequisites to modify data source of a cost model for more information.
- The expenses are allocated from IT Shared Services segment to the Service Offering segment by Equal method of the base system. By default, the allocation setup provided in the Allocation Setup stage is Equal rollup method. You can configure the rollup method, if needed, to match your specific requirements.

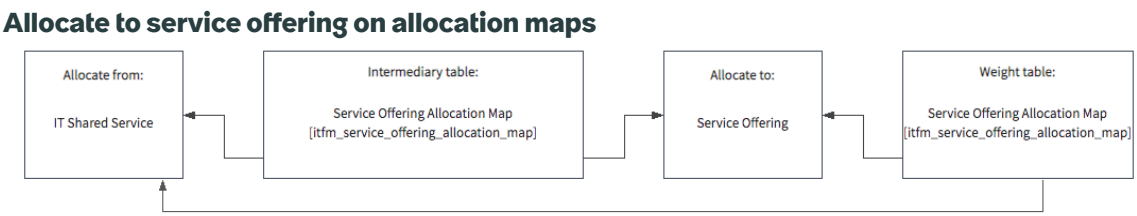
Seeded IT Shared Services

See the list of seeded IT Shared Services.

ITFM prescribed metrics

Allocate to Service Offering on Allocation Maps

The metric allocates shared service cost to service offering based on the following weighted metric:



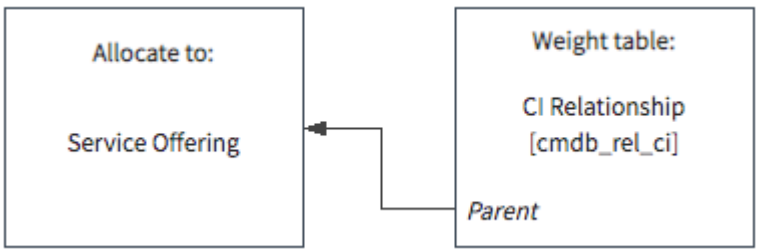
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- The Service Offering Allocation Map [itfm_service_offering_allocation_map] provides a list of all service offering allocations. This intermediary table references IT shared services from IT shared service [itfm_shared_service] table and service offering from the Service Offering [service_offering] table.
- The prescribed metric performs a sum of shared services and weights the costs accordingly to the receiving service offerings.

Allocate to Service Offerings on related CIs

The metric allocates shared service cost to service offerings based on the following weighting table:

Allocate to service offering on allocation maps

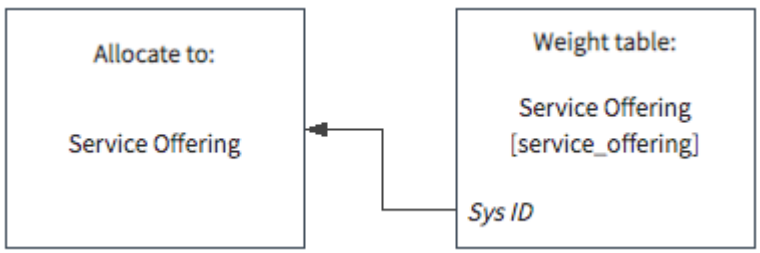


- The CI Relationship [cmdb_rel_ci] table provides a list of all relationships between configuration items.
- The prescribed metric performs a count of configuration items and weights the costs accordingly to the receiving service offerings.

Allocate to Service Offerings on Total Subscribers

The metric allocates shared service cost to service offerings based on the following weighting table:

Allocate to service offerings on total subscribers



- The Service Offering [service_offering] table provides a list of all service offerings.
- The prescribed metric performs a sum of all subscribers and weights the costs accordingly to the receiving service offering by **Sys ID**.

Configure service offering costing cost model

Configure the service offering costing cost model to allocate expenses and generate bucket cost lines for services offered at each level.

Before you begin

Role required: cost_transparency_analyst

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Procedure

1. Navigate to **All** > **Financial Modeling for SPM** > **Service Offering Costing Model**.

   The field values in the Financial Model – Service Offering Costing form are pre-populated. You can choose to enter a model owner and user group for the Service Offering Costing cost model. There is no data source for this cost model.

2. On the form, update the required fields.

   Financial Model – Service Offering Costing form

Field	Description
Name	Name of the cost model.
Description	Short description of the cost model.
Model Owner	User who owns the cost model.
Data Source	Source of data for the cost model. This cost model has no data source, hence the field is non-editable.
User Group	Group of users who can access the cost model.
Include Sub-Bucket info	Option to show sub-bucket information. If selected, the generated cost lines and breakdown lines hold sub-bucket information.

3. Click **Update**.
4. To run cost allocations, click **Allocate Expenses** button.

   Note:
   If you are a non-analyst licensed customer, ensure that the number of accounts in each segment and the total number of accounts in the cost model is within the threshold values 4000 and 12000 respectively.

   Use this option to run cost allocation from the cost model form and not necessarily from the workbench.

   a. Select the fiscal period in the Allocate Expense dialog box.

   b. Click **OK**.

      The allocation engine runs to generate cost allocations for the selected fiscal period. The engine does cleansing and bucketing. It allocates the expenses and creates allocation lines. However, if the cost model has no data source, the engine ignores the cleansing and bucketing stages and creates allocation lines.

5. To generate cost lines for leaf buckets associated to the cost model, click **Generate Bucket Cost** button.

   Use this option to generate bucket amount lines for this cost model that has no data source. Cost lines are generated for each leaf bucket that has no further sub-buckets. Even if there is

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no amount in the bucket, the amount lines are generated in the Groomed General Ledger Data [itfm_gl_data_groomed] table, populating zero in the **Amount** column. The table displays the bucket, sub-bucket, and amount associated with the cost model for the fiscal period that you selected.

a. Select the fiscal period in the Generate Bucket Cost dialog box.

b. Click **OK**.

- If there is no amount in a bucket, the allocation engine still generates a groomed line with zero expense for the selected fiscal period of the cost model.
- If there are pre-existing groomed lines with amounts in buckets for that fiscal period, then the engine does not overwrite those cost lines.

You can edit the **Amount** column to enter the amount for each sub-bucket.

6. To view the bucket amounts, navigate to **Financial Modeling for SPM** > **Bucket Amounts**.
7. To view the buckets associated to this cost model, navigate to **Financial Modeling for SPM** > **Buckets**.
8. To view the list of all service offering allocations, navigate to **Financial Modeling for SPM** > **Service Offering Allocation Maps**.
9. **Optional:** Use the **Allocate to Service Offering on Allocation Maps** metric and allocate expenses using weighted method.

   (Optional) Calculate spend per service offering based on the consumption data stored in the service offering allocation maps table.

   To configure the service offering allocation map table and allocate expenses using weighted method, see Allocate expenses using service offering allocation map.

Allocate expenses using service offering allocation map

You can allocate expenses based on the actual consumption of services offered using the weighted method. In the weighted rollup method the metric weights the amount by the account values. Use the service offering allocation maps table to store your actual consumption data of the cost for service offerings.

Before you begin

Role required: cost_transparency_analyst

About this task

Although the base system provides you with the default **Equal** method to roll up the expenses from the IT Shared Services segment to the Service Offering segment, you can also opt for **Weighted** rollup method. In this method, the expenses from the IT shared service segment are allocated to the service offering segment based on the consumption data that you have stored or entered in the Service Offering Allocation Map [itfm_service_offering_allocation_map] table. In this case, the expense is allocated based on the weightage of consumption. Therefore, cost is divided using **Allocate to Service Offering on Allocation Maps** metric and the Service Offering Allocation Map table that has the consumption data is used to weight the metric.

Procedure

1. Navigate to **All** > **Financial Modeling for SPM** > **Service Offering Allocation Maps**.
2. Click **New**.
3. On the form, fill in the fields.

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Service Offering Allocation Map form

Field	Description
Allocation Weight	Expenses allocated based on a weighted calculation.
IT Shared Service	Segment from where the money is allocated.
Service Offering	Segment to which the money is rolled up.

4. Click **Submit**.

For more information on the calculated spend per offering and to configure the estimated spend offering cost source, see Financial Management for Service Owner Workspace.

Financial Modeling

With Financial Modeling, you can determine the allocation rules and run them automatically for all data in the future. There are several other components that you must set up before you can use the workbench to allocate expenses.

Start with associating data sources to cost models. Use data source to add additional columns for cleansing or bucket split by selecting the Used by cleansing option of the Financial Data Source Field Map record.

Fiscal calendars, which was under IT Financial Management, has been moved to ServiceNow AI Platform area. You can access the documentation for Fiscal calendars here.

Financial data import

Financial data resides in the General Ledger Staged Data table.

You can import financial data into the General Ledger Staged Data [itfm_gl_data_staged] table by using either of the following methods:

- Import sets
- Easy import

See Import sets.

Important:
Be sure that your fiscal calendar can be used with your financial data.

General ledger

The general ledger contains all expenses for your organization for all fiscal periods.

The general ledger contains these types of expenses:

- **Staged expenses** that you imported from your external source. Imported expenses are saved in the General Ledger Staged Data [itfm_gl_data_staged] table.
- **Cleansed expenses** that the workbench uses during the Data Cleansing stage. Changes to expenses during this stage are saved in the General Ledger Cleansed Data [itfm_gl_data_cleansed] table. Each time you add an expense to the General Ledger Staged Data table, a corresponding expense is created in this table.

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- **Groomed expenses** that the workbench uses during the Bucketing stage. Changes to expenses during this stage are saved in the Groomed General Ledger Data [itfm_gl_data_groomed] table. This is also used for non-General Ledger expenses to hold the amounts manually entered through the workbench or to enter the amounts directly.

View expenses in the general ledger

You can view records in any of the general ledger tables and make changes if necessary.

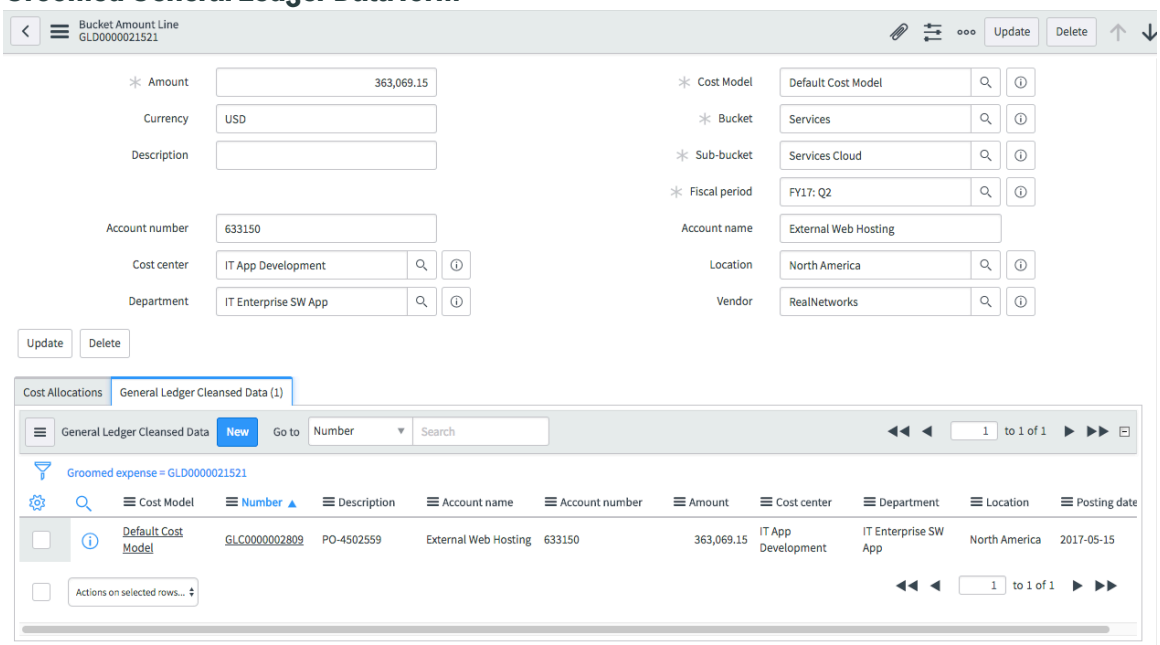
Before you begin

Role required: cost_transparency_admin, cost_transparency_analyst

Procedure

1. Navigate to **All** > **Financial Modeling** > **Workbench** and navigate to the review stage of the workbench.
2. Open the link in the number of **Groomed lines** that are generated in the **Others** section.
3. On the form, fill in the fields.

Groomed General Ledger Data form



Groomed General Ledger Data form

Field	Description
Number	Auto-generated identification number for the general ledger data record.
State	The current state of the record: ○ **Unallocated**: Allocations for this expense are not allocated. ○ **Allocated**: This expense has been allocated. ○ **Locked**: The general ledger expense is locked so that its allocation lines cannot be reverted.
Account name	Name of the account.

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Field	Description
Account number	Account number this expense applies to. This field is mandatory on the Cleansed General Ledger Data form to ensure that all cleansed expenses appear in an account in the Bucketing stage of the workbench.
Description	Detailed description of the expense.
Amount	The amount of the expense.
Cleansed expense	[General Ledger Staged Data form] A reference to the corresponding record in the General Ledger Cleansed Data table. The expense in the General Ledger Cleansed Data table that is automatically created when you create an expense in the General Ledger Staged Data table.
Staged expense	[General Ledger Cleansed Data form] A reference to the corresponding record in the General Ledger Cleansed Data table.
Groomed expense	[General Ledger Cleansed Data form] A reference to the corresponding record in the Groomed General Ledger Data table.
Grooming rule	[General Ledger Cleansed Data form] The condition that the workbench uses to filter expenses that are put in buckets.
Currency	Currency that the expense is valued in. The currency is a three letter code defined in the Currency [fx_currency] table. If the value in this field does not match any code in the Currency table, dollar signs are displayed by default for all expenses. Make sure that your expenses in all general ledger forms are in the same currency as your system currency.
Document amount	Amount of the original expense document.
Document currency	Currency that the original expense document uses. As with the **Currency** field, the value in the field is a three letter code defined in the Currency table.
Bucket	[Groomed General Ledger Data form] Bucket that this expense is associated with.
Sub-bucket	[Groomed General Ledger Data form] Sub-bucket that this expense is associated with.
Cost center	Cost center this expense applies to.
Department	Department associated with this expense.
Fiscal period	[Groomed General Ledger Data form] Period during which this expense occurred.
Document date	Date on which the original expense document was issued.

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Field	Description
Import set	The import set containing the data that you imported into the instance.
Location	The location of where the expense was incurred.
Vendor	The vendor record that is referenced from the Company [core_company] table.
Posting date	The date of when this expense was incurred.
Local amount	The amount represented in the local currency.
Local currency	The currency associated with the account.
Segments	Expense amounts for the segments that are defined in the hierarchy of segments.

Related Lists section of the Groomed General Ledger Data form

Field	Description
Cost Allocations	[Groomed General Ledger Data form] Allocation lines created from this expense.
General Ledger Cleansed Data	[Groomed General Ledger Data form] The records in the General Ledger Cleansed Data table that created the groomed expense records after the expenses are put into buckets.

4. Click **Submit**.

Financial data sources and field maps

Financial data sources point to the actual raw expense data table used by financial modeling and financial planning.

In the Financial Management application, the data source helps to map the raw expense data and its fields to the transaction table fields.

You can use the General Ledger Staged Data table and General Budget Staged Data table for base system financial model activities. These tables can also be extended to create a custom source table for your financial model. You can model your financial activities using any data source or without any data source at all. If it is without any data source, then it is expected that the amounts would be manually entered directly into the cost model. You can create more field maps and configure which fields are to be used for cleansing or split bucket, as and when required.

Financial planning uses data source to generate actuals. The segments used in budget model hierarchy must be a mandatory part of data source field maps to accurately map the actuals with the budget. It also helps in budget key generation.

Start working with the following data sources available with the application:

- GL Staged
- Cost Plan Breakdown (FM-PPS financial planning integration)

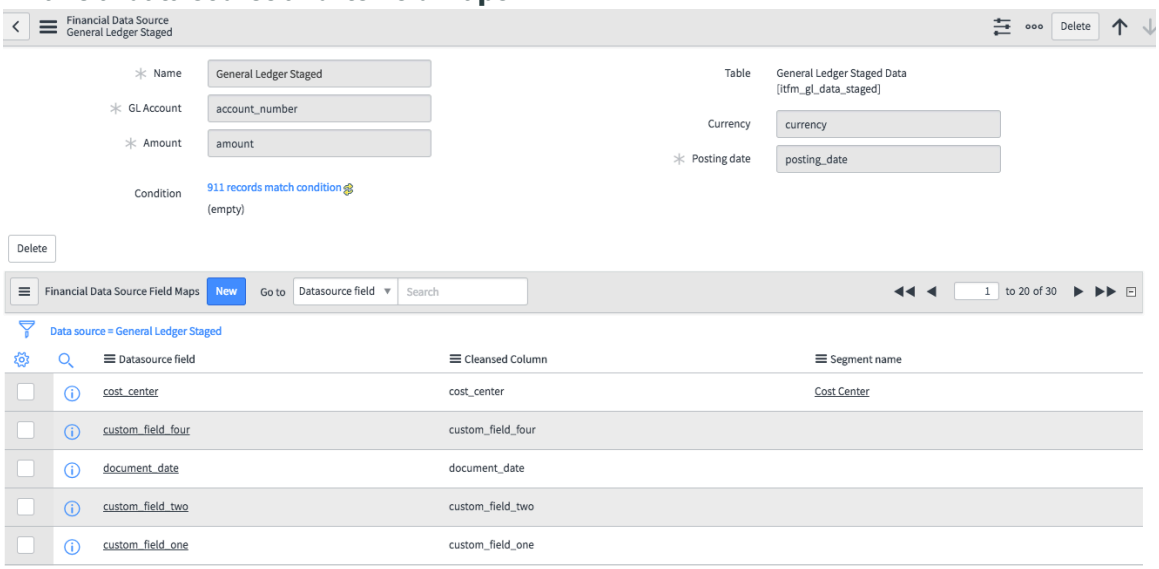
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The following table lists the default field maps provided with each data source. You can change the default mapping to point to a different segment or column. For example, by default the Cost Center column is mapped to the Cost Center name [cmn_cost_center]. If the data in that column is the code in your case, then you can change to Cost Center code [cmn_cost_center]. You can create more field maps for the custom fields as required.

Default data source field maps

Segment name	Transaction table
Cost Center	Cost Center [cmn_cost_center]
Location	Location [cmn_location]
Vendor	Company [core_company]
Department	Department [cmn_department]
Project	Project [pm_project]

Financial data source and its field maps



Create a financial data source

Database columns referring to raw expense details must be identified to create a new data source in Financial Management.

Before you begin

Role required: itfm_plan_analyst, admin, cost_transparency_admin

About this task

Data sources are available for both Financial Modeling and Financial Planning applications.

Procedure

1. Navigate to **All** > **Financial Modeling** > **Data Sources** > **Setup**.
2. Click **New**.
3. On the form, fill in the fields.

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Financial Data Source form

Field	Description
Name	Enter a descriptive name for the new data source record.
GL Account	Select the database column that refers to general ledger account expenses.
Amount	Select the database column that refers to actual expense amount.
Table	Select a database table with actual raw expense data. The **Table** field shows the source from where the financial data is retrieved. The source of the Financial Modeling application is no longer confined to the General Ledger Staged table alone, but can point to any table with financial transaction information. Any table in the platform can be used as long as the mandatory column requirements of representing amount, account number and date are met.
Currency	Select the database column that refers to currency values for the expenses.
Posting date	Select the database column that refers to the date when the expense was incurred.
Condition	Apply conditions to filter records.

4. Click **Submit**.

What to do next
Create field maps for the data source.

Create a data source field map

Field maps create a reference between the data source columns and transaction columns.

Before you begin
Role required: itfm_plan_analyst or cost_transparency_admin

About this task
The transaction table is associated to a segment. Define a relationship between the data source and transaction fields to enable flexible data cleansing and bucket split.

Procedure
1. Navigate to **All** > **Financial Modeling** > **Data Sources** > **Setup**.
2. Click to open a data source record.
3. Click **New** in the **Financial Data Source Field Maps** tab to create a field map.
4. On the form, fill in the fields.

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Financial Data Source Field Map form

Field	Description
Data source	Auto populates the data source for which the field map is created.
Datasource field	Column on the data source table for field mapping.
Cleansed Column	Defines the mapping between the Data source table column and the Cleansed table column. If the field is None, data from the Data source table column is not copied during cleansing. For the existing General Ledger Staged data source mappings are preconfigured.
Used by cleansing	Check box to make this field map reference available for cleansing in financial modeling.
Segment name	Segment to map the transaction table.
Mapped to transaction field	Column on the transaction table for field mapping.
Used for Bucket split	Check box to make the field map reference available for cost bucket split when using the **Allocation Setup** tab of the workbench.

5. Click **Submit**.

Segments

Segments define the transaction table used in cost model hierarchy.

You can modify the default segments offered by the Financial Modeling application. You can also create new segments based on your requirement. If segments are enabled for cost allocation, they are available during building of cost model hierarchy.

Default segments

Segment name	Transaction table
Business Unit	Business Unit [business_unit]
Department	Department [cmn_department]
Business Service	Service [cmdb_ci_service]
Business Capability	Business Capability [cmdb_ci_business_capability]
Business Application	Business Application [cmdb_ci_business_app]
Service Offering	Service Offering [service_offering]
Server	Server [cmdb_ci_server]
Cost Center	Cost Center [cmn_cost_center]
Location	Location [cmn_location]

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Default segments (continued)

Segment name	Transaction table
Vendor	Company [core_company] **Note:** Only companies with the **Vendor** check box selected are included.
IT Shared Service	IT Shared Service [itfm_shared_service]

Note: You cannot delete a segment that is allocated to a cost model.

Create a segment definition

Define segments to be used with cost and budget models.

Before you begin

Role required: budget_admin or cost_transparency_admin

About this task

You can create more than one segment in the same transaction table with different filter conditions. For example, create one segment for vendors in the core_company table where the **Vendor** field is **true**, and another segment for customers in the same table where the **Vendor** field is **false**.

Procedure

1. Navigate to **All** > **Financial Modeling** > **Administration** > **Segments**.
   You can also create a new segment from the **Segment Definition** tab on the workbench.
2. Click **New**.
3. On the form, fill in the fields.

Segment Definition form

Field	Description
Segment name	Descriptive name for the new segment.
Transactional table	Database table for transaction data to associate with the segment.
Primary field	Field in the transactional table to serve as the primary source of information for the segment.
Used by Cost Allocation	Check box to make the segment available for financial modeling.
Used by Budgeting	Check box to make the segment available for financial planning.
Condition	Conditions that can be set to filter the records.
Fiscal effective start	Fiscal start period to filter the records in allocation setup for that fiscal period. Used by Financial Modeling.

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Field	Description
Fiscal effective end	Fiscal end period to filter the records in allocation setup for that fiscal period. Used by Financial Modeling.

4. **Optional:** Set a fiscal validity for the segment to include only valid records for allocation. To view all the accounts in all fiscal periods, specify the fiscal effective start and end date as 'none'.

   a. Example 1: Consider 'server' as a segment. To filter valid servers for allocation, set the fiscal start date as the install date and set the fiscal end date as the decommissioned date.

   b. Example 2: To view only active projects for a fiscal period, use active start and end dates in the projects table.

5. Click **Submit**.

IT shared services

IT shared services are business services that are IT related but are still shared and used across your organization.

Examples of IT shared services are user services like a help desk and voice network services like a call center. You can create business services for your organization and put them into broader, customizable categories like IT operations or security and compliance.

By default, the hierarchy of segments includes a segment for IT shared services. When expenses are associated with IT shared services, they roll up to business services by default. This allows you to allocate expenses to any IT shared service and see the effects of the expenses on business services and, ultimately, the business units that comprise your organization.

For a list of seeded IT shared services, see Prescriptive cost models for shared services and business applications.

Create IT shared services

Create IT shared services to set up the IT shared services segment in the hierarchy of segments.

Before you begin

Role required: cost_transparency_admin

About this task

Then you can create rollup rules to have expenses roll up to these shared services, which in turn roll up to business services by default. Then create service types to use with shared services.

Procedure

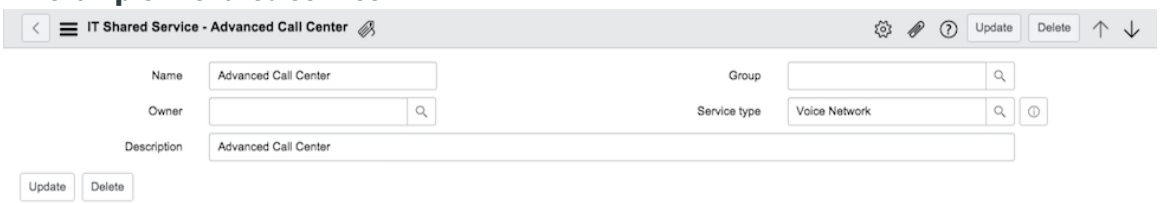
1. Navigate to **All** > **Financial Modeling** > **Hierarchy of Segments** > **IT Shared Services**.
2. Click **New**.
3. On the form, fill in the fields.

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IT Shared Service form fields

Field	Description
Name	The name of the shared service.
Owner	The user in the group that owns the shared service.
Description	A detailed description of the shared service.
Group	The group that owns this shared service.
Service type	The type of service that you are creating.

An example IT shared service



4. Click **Submit**.

Create a service type

Create service types, which are used by IT shared services.

Before you begin

Role required: cost_transparency_admin

Procedure

1. Open one of the IT shared service records.
2. Click the lookup icon in the Service type fields.
   The IT Shared Service Types list appears.
3. Click **New**.
4. Enter a name.
5. Click **Submit**.

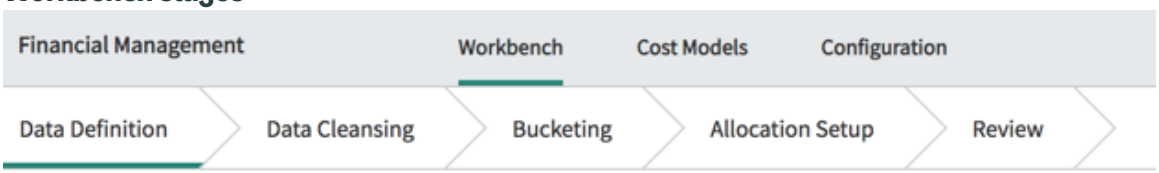
Financial Management workbench

The Financial Management workbench provides financial administrators with a graphical interface to allocate expenses.

Access the workbench through the **Financial Modeling** > **Workbench** module.

When you use the workbench to allocate expenses, you pass through the following stages:

Workbench stages



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Note:

The data cleansing stage will not be available in the Workbench stages if you do not select a data source in the Financial Model form, as there is no financial data source to pull the expense lines from. In this case, you can enter the groomed lines directly in the sub-buckets.

The Workbench tab

- **Data Definition**: Select a fiscal period and cost model to work with. See The Data Definition stage.
- **Data Cleansing**: Remove unnecessary financial expenses and put similar expenses in the same segment. This cleansing stage gives you the opportunity to tidy up expenses in the general ledger. See The Data Cleansing stage.
- **Bucketing**: Group related expenses into customizable buckets. See The Bucketing stage.
- **Allocation Setup**: Assign the buckets to accounts and segments that comprise the hierarchy of accounts, and create rules that govern how segments relate to each other. See Allocation Setup stage.
- **Review**: Review the expense assignments you made, and then run the allocation engine to allocate expenses. See The Allocation Review stage.

The Cost Models tab

All cost models in the application. You can create a basic cost model from this tab and open, modify, or delete existing cost models. See The Cost Models tab.

The Configuration tab

General configuration settings, such as currency, the fiscal calendar, the main Financial Management report, and advanced actions that allow you to delete financial data. See The Configuration tab.

Threshold value for number of accounts

If you are a non-analyst licensed customer, when the number of accounts in a segment or cost model exceeds the threshold value, the **Basic Allocation Setup** option is enabled automatically.

Parameter	Threshold value
Maximum number of accounts allowed in a segment	4000
Total number of accounts allowed in a cost model	12000

Note:
Running Allocation Expenses does not work when the number of accounts exceeds the threshold value.

Browser requirements

If you are using Internet Explorer, use version 11 or later to use the workbench. You can also use any of the other generally supported web browsers.

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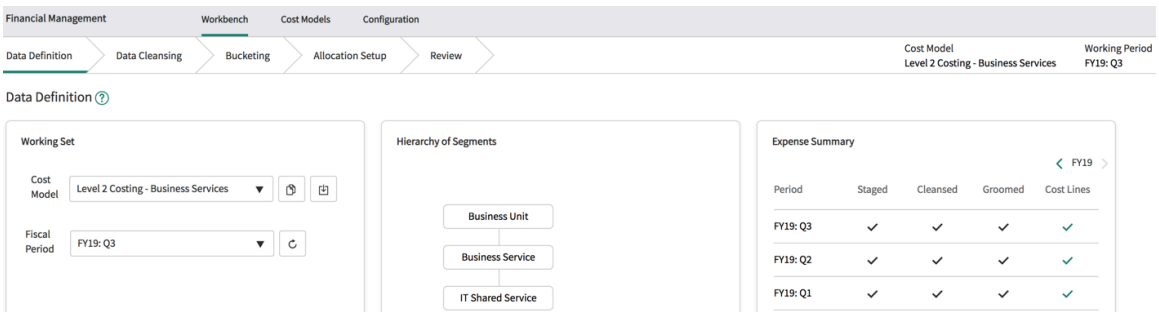
The Data Definition stage

The Data Definition stage provides you with settings to set up the application, before you start to allocate expenses.

These sections are presented:

- **Working Set**: Select the fiscal period that you want to work with. Fiscal periods are automatically created based on the financial data that you import. As you progress through the workbench, only the expenses that were incurred during the fiscal period that you select here are available to you. You can also select a cost model you want to work with and clone one from the selected cost model.
  - Use the clone this cost model ( ) icon to clone a cost model from an existing one.
  - Use the download ( ) icon to download the cost model for the purpose of uploading it to, or deploying it in another instance to do cost modeling in a different pre-production environment. You can later move the cost model to other production environments.
  - When you open the workbench and if the fiscal period is not displayed with current one or when you switch between different cost models and the fiscal period is not refreshed, then click the refresh fiscal periods for cost models ( ) icon to display the current fiscal period.
- **Hierarchy of Segments**: View the segments in the hierarchy of segments and their positions in the hierarchy for the cost model you are dealing with.
- **Expense Summary**: See whether or not there are records in the staged and groomed general ledger tables, and if there are allocation lines.

The data definition on the workbench



Choose a working set

A working set refers to the set of expenses that you want to use in the workbench as you pass through all the stages.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

About this task

The working set consists of the fiscal period, which is the block of time on the fiscal calendar during which the expenses were incurred. Make sure you select the correct fiscal period. As you progress through the stages of the workbench, the expenses you work with are those that were incurred during the selected fiscal period only, not any other fiscal periods. The fiscal period you select is referred to as the working period, and is always visible on the upper-right side of all workbench pages.

Procedure

Select the fiscal period for the data that you want to work with from the **Fiscal period** choice list.

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The options in this choice list come from the fiscal calendar. If you do not see the fiscal period you want, you can make changes to the fiscal calendar.

Clone a cost model in the workbench

Use the preconfigured cost models or clone one from the base cost models for your financial model activities. By cloning you can map your financial data source to the cost model as per your business requirements without affecting the original cost model.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

Important:

- This feature is available only when you own an ITBM Analyst license.
- If you are upgrading from a previous version to Xanadu, by default, the **Generate Controlled Cost Lines** option is enabled on the new model and the **Generate GL Expense Lines** option is disabled on the new model irrespective of whether the options were disabled or enabled in the base model. These options are not editable and do not appear on the default view of the Cost Model View page.

About this task

You can select a preconfigured basic cost model or clone a cost model from the **Data Definition** stage of the **Workbench** or from the **Cost Models** tab.

Procedure

1. Navigate to **All** > **Financial Modeling** > **Workbench**.
2. Do one of the following to access the basic cost model interface:
   - Select a cost model from the **Cost Model** choice list in the **Working Set** region of the **Data Definition** stage, and click the **Clone this cost model** ( ) icon.
   - Click the **Cost Models** tab, select the base cost model, and click the **Clone Cost Model** button or the **Clone this cost model** ( ) **Action** icon.
3. On the form, fill in the fields.

Clone Cost Model form

Field	Description
Name	Name of the cost model that you selected pre-populates in the field.
Description	Description of the cost model defaults.
Clone From	A cost model to clone the new one from.
Data source	The actual raw expense data table used for financial modeling activities. See Financial data sources and field maps. The base system options are: ○ **Cost Plan Breakdown**: Maps to the raw expense data, where the actual cost and allocated cost are captured for a fiscal period in the cost plan breakdown [cost_plan_breakdown] table.

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Field	Description
	○ **General Ledger Staged**: Maps to the database column that refers to general ledger account expenses in the general ledger staged data [itfm_gl_data_staged] table. ○ **No Data Source**: Option to manually enter the amounts in the cost model at the bucketing stage.

4. Click the **Clone Cost Model** button.

   You can also create a cost model on the cost model form.

Expense summary

The Data Definition stage of the workbench shows a summary of the expenses in the application. Icons for each type of expense and for each fiscal period shows you the state of allocation records.

Icons on the expense summary

Icon	Description
×	Records do not exist.
✓	Record lines exist.
ⓘ	Records changed since allocations were last generated.
❗	Errors occurred when the application was running allocations. If you see this icon, verify all your settings in the workbench and run the allocations again.

The Expense Summary section

Label	Description
Period	Each period in the fiscal calendar.
Staged	If records are in the General Ledger Staged Data [itfm_gl_data_staged] table.
Cleansed	If records are in the General Ledger Cleansed Data [itfm_gl_data_cleansed] table.
Groomed	If records are in the Groomed General Ledger Data [itfm_gl_data_groomed] table.
Lines	If records are in the Cost Allocation [itfm_cost_allocation] table.

The Data Cleansing stage

The Data Cleansing stage allows you to clean up the expenses that you imported into the application.

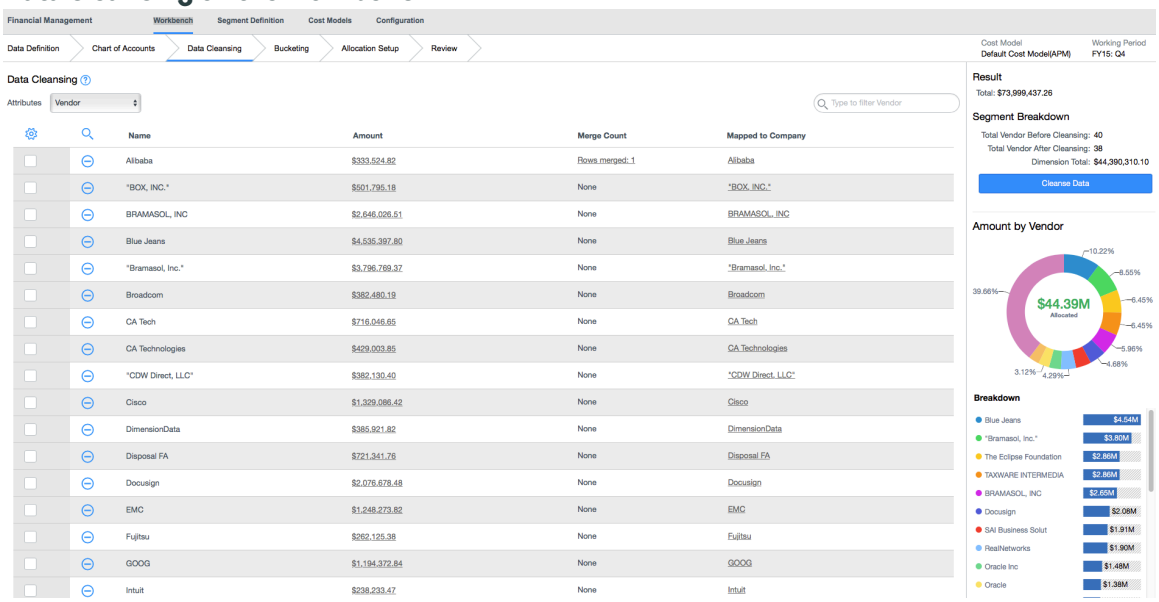
On the Data Cleansing page, the expenses that you imported appear in expense rows grouped by one of the following segments: vendors, cost centers, departments, and locations. Starting with Istanbul, data cleansing can be performed on custom fields. To enable custom field cleansing, select the check box for **Used by cleansing** under financial data source field map.

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The summary section on the right pane provides a breakdown of the expenses that comprise each segment. From here, you can:

- Review the imported expenses
- Merge expense rows
- Map expenses to records in the selected segment

Data cleansing on the workbench



Review expenses before cleansing

You can view several additional details about the expenses that you imported into the application.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

Procedure

1. Select a segment from the **Attributes** choice list and review the data (see table for column descriptions).

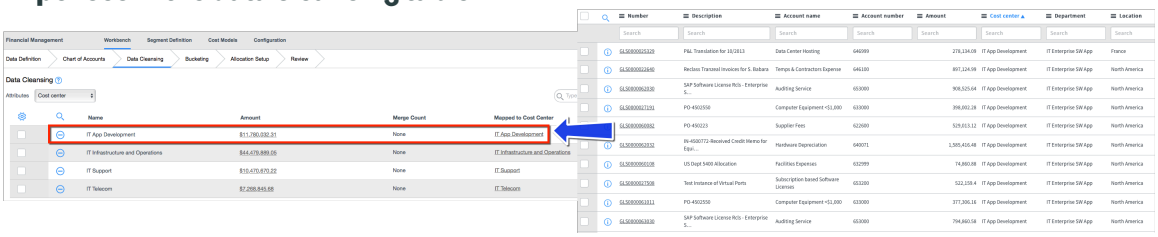
The data cleansing table

Column	Description
Name	Name of the specific item in the selected segment, such as the name of the vendor or location.
Amount	Amount of the imported expense associated with the item in the segment.
Merge Count	Number of other expenses have been combined with the expense in that row. By default, the value for each record is **None**. When you merge expenses, the value changes to show the number of expenses merged.
Mapped to	If the application can find a match between the name of the specific item in the selected segment, such as the same vendor or cost center, already in your instance. If the application cannot find a matching record, a new one is created when you cleanse the data.

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Each expense row is not a record in the system, but rather an aggregate view of the expenses in the General Ledger Staged Data table that contain the same value for a segment that you select. For example, if you select the **Cost center** segment, each expense row is actually the sum of all the general ledger expenses that have the same cost center.

Expenses in the data cleansing table



2. You can do any of the following on the list of expenses that appear:
   - Filter the list of expense rows by typing text into the search field at the top-right of the list. The field searches the text in the **Name** column.
   - Click the expense amount in the **Amount** column to view the expense records in the General Ledger Staged Data table that comprise the row.
   - Click the delete icon ( ) on the left of the expense to ignore the row. The expenses that you ignore here are not carried over to the next stage to be assigned to buckets.

Merge expense rows by segment

Merging expenses means taking the expenses that are associated with one segment record.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

About this task

For example, you can take vendor ABC and associate expenses for this vendor with another segment record, like vendor XYZ. Effectively, you are changing the value for the Vendor field on the expenses from ABC to XYZ.

Procedure

1. Click one or more expense rows to select them.
   These rows can be referred to as the source expenses.
2. Drag them onto another expense.

   This row can be referred to as the destination expense.

   The general ledger expense records for the source expenses are modified. The field that is modified is the segment you are currently working with, such as **Vendor**. The value for the field is changed to whatever value that field had on the destination expense.

   Note:
   When you merge expenses, you are only modifying the segment value, such as the vendor or the cost center. You are not modifying the account numbers associated with the general ledger expenses that comprise the expense row.

3. Click the number of entries in the **Merge Count** column.

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4. To ignore a merged expense row, click the delete icon ( ) next to the entry in the Merged Segments window.
   The expense row reappears in the list of all expenses.

Map segment records to expense rows

The application attempts to map the expense row to an existing record in the segment that you selected and gives you the option of creating a new record in the segment's table, as long as the expense row segment field has a value.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

About this task

For example:

- If you are cleansing data based on the Vendor segment, and the expense row's vendor is already in the Company [core_company] table, the **Mapped to** column shows **Existing vendor**.
- If the expense's vendor does not exist in the Company table, the **Mapped to** column shows **A new vendor will be created**. This message tells you that when you finally cleanse the data, the application creates a record for the vendor in the Company table.
- If the expense **Vendor** field is empty, the expense does not show up in any expense rows when **Vendor** is selected.

If a match is found, you can view the matching record and make changes by clicking the edit icon ( ) and modifying the form.

If no match is found and you want the system to create a record, simply leave the field as it is. Later, when you click **Cleanse Data**, the record is automatically created.

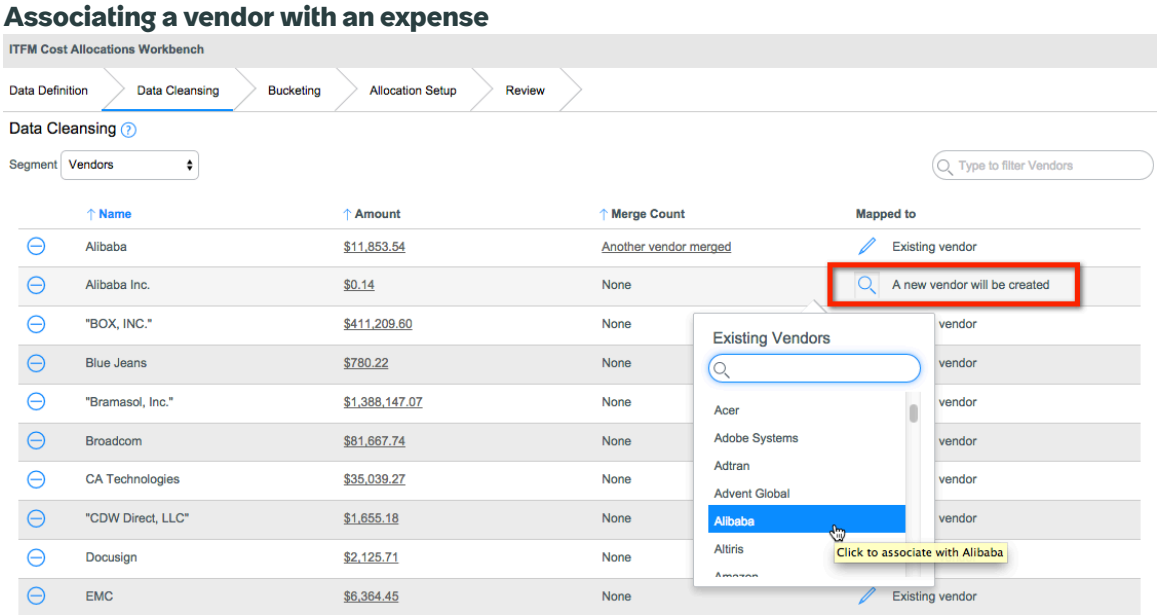
If no match is found and you do not want to create a record, you can manually associate an existing record with the expense:

Procedure

1. Click the lookup icon next to the value in the **Mapped to** column.
2. Filter the list by typing keywords in the search field.

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3. Select an existing record from the list.



Cleanse data

After you clean up the expenses on the Data Cleansing table, run the cleansing engine.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

Procedure

Click **Cleanse Data** on the right-hand pane.

The actual expense records you are manipulating in the Data Cleansing stage are in the General Ledger Staged Data table, but a replica of each expense record is also in the General Ledger Cleansed Data table. After you cleanse the data, changes are saved to the records in the General Ledger Cleansed Data table, not the General Ledger Staged Data table.

The Bucketing stage

The Bucketing stage allows you to assign expenses to groups called buckets.

A bucket can be any type of category that helps you organize expenses. Do not confuse buckets with segments. Buckets are customizable groups in which to put expenses before allocation. Segments, which are defined in the hierarchy, are parts of your organization to which you can allocate expenses.

On the Bucketing page, the expenses that you cleansed appear on the left pane, grouped by account number. The buckets into which you can group expenses appear in the middle pane. The summary section on the right pane provides a breakdown of how the expenses are assigned to buckets. If you do not see the correct data in the Accounts column, open the cleansed general ledger and verify that the records are correct.

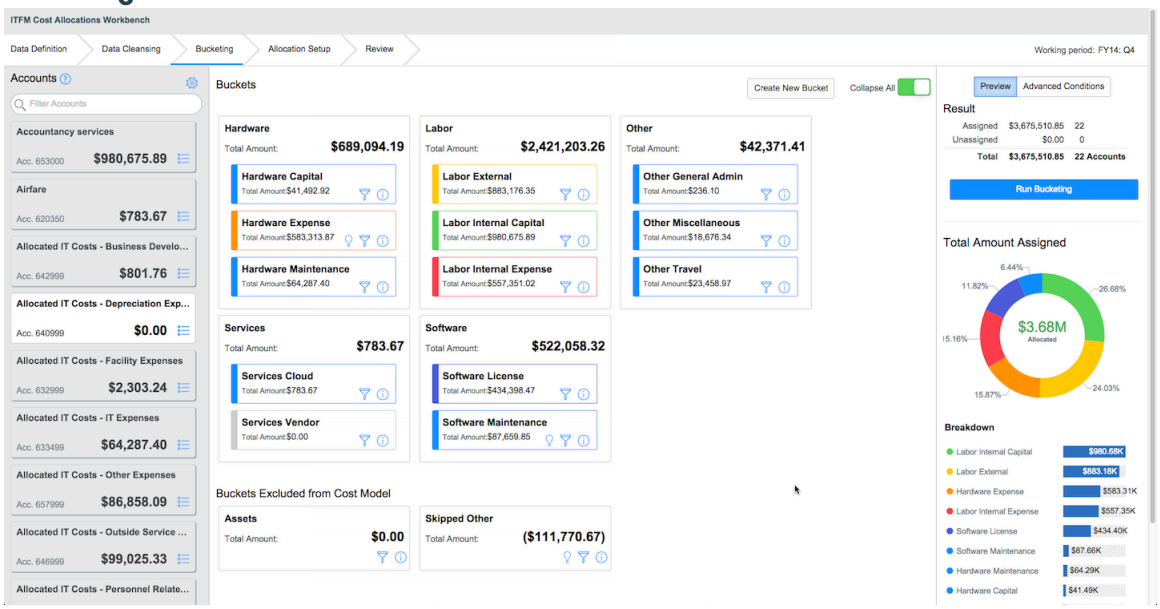
In the Bucketing stage, you can:

- Create and modify buckets
- Create the filter conditions
- Create groomed lines for cost models with no data source

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- Put the expenses from each account into the correct bucket
- Review bucket assignments and run the bucketing engine

Bucketing on the workbench



View account details

The bucketing page shows all the cleansed data grouped by accounts on the left pane, and the existing buckets on the main pane. The buckets are presented with sub-buckets grouped within parent buckets.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

Procedure

1. Click the gear icon ( ) next to Accounts.
2. Show or hide the accounts that are already assigned by clicking the **Show accounts categorized in buckets** toggle.
   You can assign expenses to buckets for unassigned accounts only.
3. Sort the accounts by selecting **Name**, **Account**, or **Amount**in the **Sort by** list.
4. Further sort the accounts by selecting **Ascending** or **Descending** from the **Sort** list.
5. View the records from the General Ledger Cleansed Data table that belong to an account by clicking the lines icon ( ).
   The records open in the list view in a new browser tab or browser window.

Create and modify buckets

You can create a bucket in the **Bucketing** stage of the workbench if you did not already do so with the standard Bucket form.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

Procedure

Click **Create New Bucket** on the top-right of the middle pane.

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The Bucket form appears. The form is the same as the Bucket form that you can access from the **Financials** > **Cost Model** > **Account Buckets**. See Creating Buckets for more information.

Note:
You can create buckets that are excluded from your cost model, meaning that they are not available for assignment to accounts and segments in the next stage: Allocation Setup. If you select the **Exclude from cost model** option on the Bucket form, the bucket appears at the bottom of the Bucketing page under **Buckets Excluded from Cost Model**.

Create bucket filter conditions

You can also create a condition to filter the data that goes into the bucket. These bucket filter conditions are also called grooming conditions, and they are the **Advanced query conditions** type.

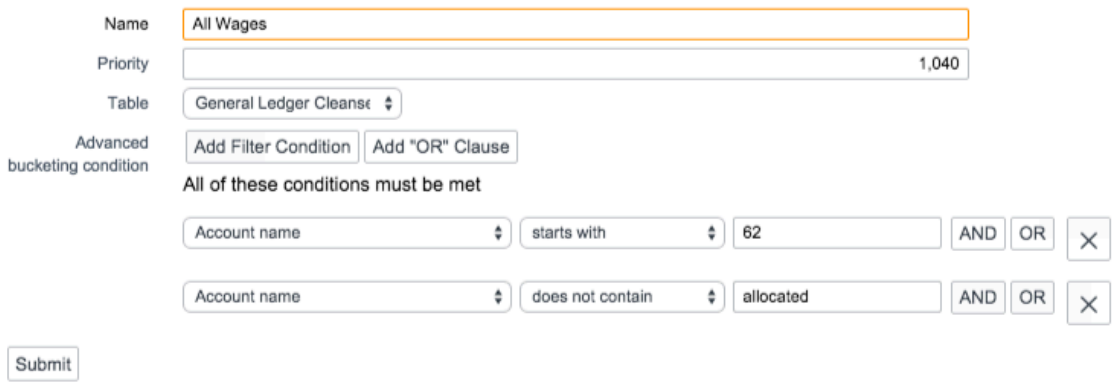
Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

Procedure

1. Click the filter icon in the bucket.
2. Fill in the form fields (see table).
3. Click **Submit**.

An example bucket filtering condition



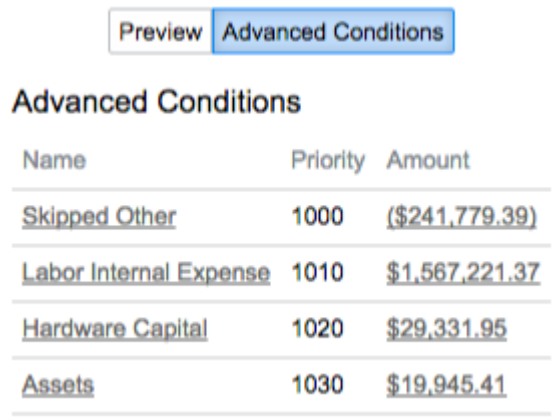
Fields for bucket filter conditions

Field	Description
Name	Descriptive name for the condition.
Priority	Value that determines when the filter is applied relative to other filters. If two filters have the same settings, the filter with a higher priority is applied.
Table	The table containing the expenses that are filtered when put into the bucket. By default, the General Ledger Cleansed Data [itfm_gl_data_cleansed] table is selected.
Advanced bucketing condition	Use the condition builder to create the filter.

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When you create a bucket filter, it appears in the **Advanced Conditions** tab above the donut chart in the right pane.

The Advanced Conditions tab



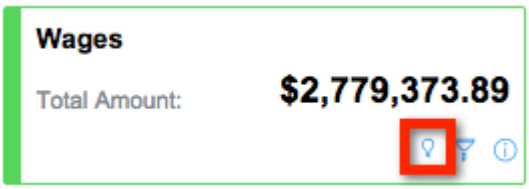
What to do next

You can verify the filter conditions or make changes:

- Click the name of the condition to open the Advanced Condition form.
- Click the amount to open the list of general ledger expenses that match the filter.

The advanced filter condition icon also appears on the bucket:

The advanced filter condition icon on a bucket



Create groomed lines for cost models with no data source

If there is no data source for the cost model that you have selected in the Data definition stage of the Financial Management workbench, there is no cleansing process either.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

About this task

In the bucketing stage, there is no left pane with accounts. In such cases, you can create or edit the groomed lines in the Bucket Amount Line form by clicking the edit icon in the sub-buckets.

Note:
If you are an Application Portfolio Management or Service Portfolio Management user, then Business Application Costing Model cost model and Service Offering Costing cost model do not have data source.

Procedure

1. Navigate to **All** > **Financial Modeling** > **Workbench**.
2. In the Bucketing stage, click the edit icon ( ) of a sub-bucket that you want to add the groomed lines to.

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3. On the form, fill in the form fields.

Groomed lines form

Field	Description
Amount	Amount of the sub-bucket.
Currency	Currency for the amount.
Description	Description for the bucket amount.

For a preconfigured Customer Service Management (CSM) cost model, the **Account number**, **Cost center**, **Department**, **Account name**, **Location**, and **Vendor** fields are not applicable.

If more than one groomed lines exist for a given sub-bucket, a list of groomed lines is displayed.

4. Click **Submit**.

Put expenses into buckets

After you set up the buckets, simply drag and drop expenses into buckets.

Before you begin

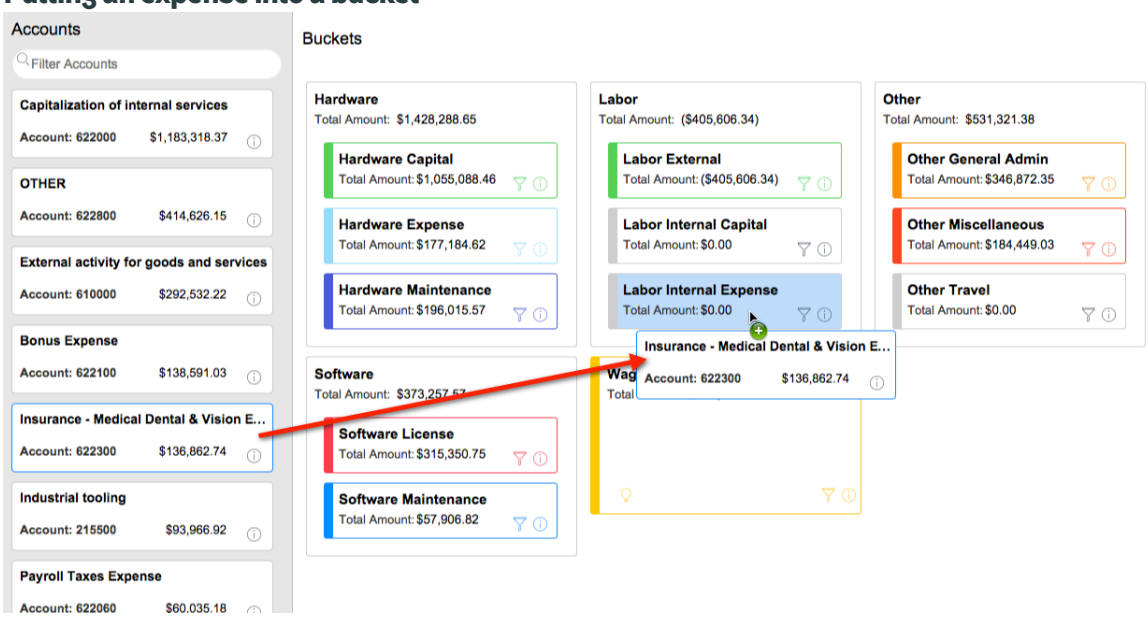
Role required: cost_transparency_admin or cost_transparency_analyst

Procedure

1. In the **Accounts** pane, find the accounts you want to assign to buckets by typing the account name in the filter box or scrolling through the list.
2. In the **Buckets** pane, you can show or hide sub-buckets by clicking **Collapse All**.
3. Drag expenses from the **Accounts** pane to the relevant sub-bucket.

   The **Total Amount** value in the bucket and the **Total Amount Assigned** on the donut chart in the right pane change based on the assignment.

Putting an expense into a bucket



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Review bucket assignments and run bucketing

After the data is in buckets, you can see the total amounts for each bucket and the individual general ledger expense records for each bucket.

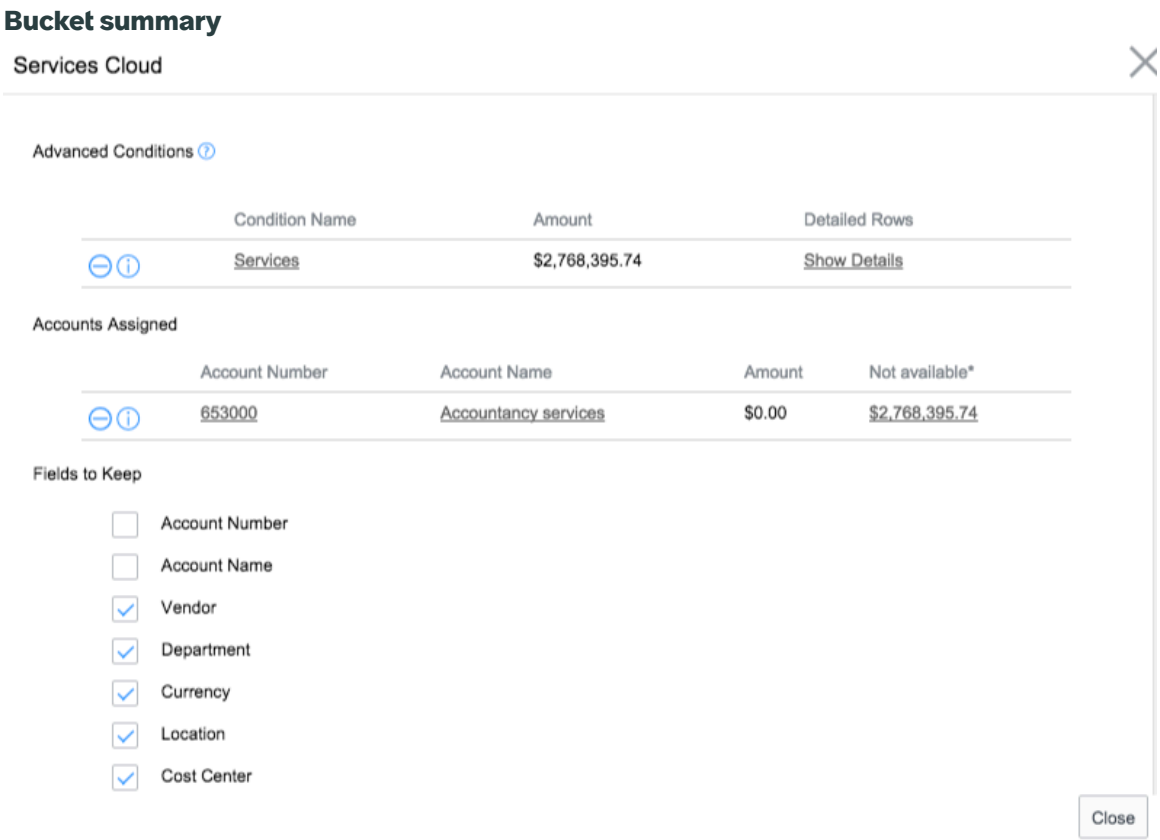
Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

Procedure

1. Click the information icon ( ) on any bucket to display summary information about the bucket.
2. Under **Advanced Conditions**, verify that the bucket filter condition is correct.
   a. Click the condition name to open the bucket filter condition form and make changes if necessary.
   b. Under **Detailed Rows**, click **Show Details** to show the expense records, which are saved in the General Ledger Cleansed Data [itfm_gl_data_cleansed] table, that are assigned to the bucket.
   c. To remove a bucket filter condition, click the delete icon ( ).
3. Under **Accounts Assigned**, verify that the correct accounts and all the expenses in them appear in the bucket.
   a. Click the account name to show the expense records from the General Ledger Cleansed Data table that are assigned to the bucket.
   b. To remove an account and all expenses that belong to the account from the bucket, click the delete icon ( ).
4. Under **Fields to Keep**, select the check boxes for fields you want to keep on the records in the bucket.

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5. Close the window when you are finished.
6. When the data is correct, click **Run Bucketing** on the right pane.
   - When you run the bucketing engine, the data is saved in the Groomed General Ledger Data [itfm_gl_data_groomed] table.
   - The application deletes all existing allocation lines for the fiscal period you are working with when you click **Run Bucketing**.

Allocation Setup stage

The Allocate Setup stage enables you to assign expenses to accounts and segments.

On the Allocation Setup page, the sub-buckets that you created appear in the left pane, except for sub-buckets that you excluded from the cost model. The segments and their accounts appear in the middle pane, in the hierarchy that you defined in the data definition stage. The summary in the right pane provides a breakdown of how the expenses are assigned to accounts in each segment.

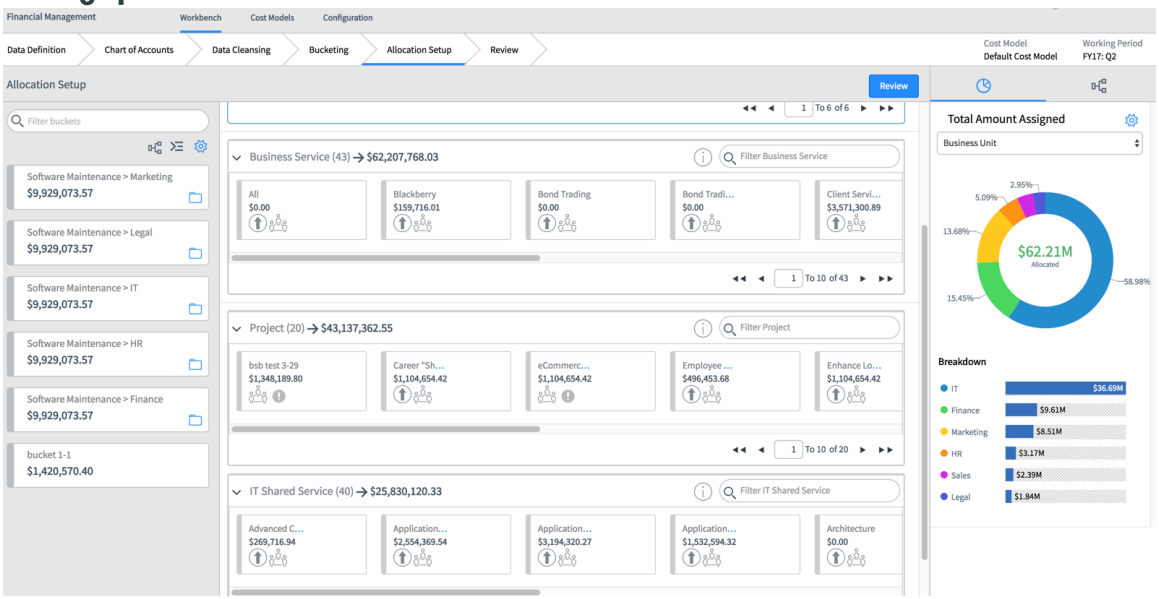
In the Allocation Setup stage, you can:

- View bucket contents and split buckets into smaller buckets, if necessary.
- Create and modify rollups to specify exactly how expenses are applied to higher-level segments in the hierarchy.
- Assign expenses to accounts.
- Review assigned expenses and revert bucket assignments if necessary.
- Filter the allocation setup segment account by amounts greater than, lesser than, or equal to a certain value.

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- Configure the Display Records per segment pagination option in the Configuration tab to display 5, 10, 15, 25, or 50 accounts per page at the same time. The pagination option displays the selected number of accounts out of the total number of accounts in a segment per page. The right and left arrows help you to navigate to the next set of records until all the accounts in the segment are displayed.
- Similarly, view selected number of accounts on the lighter workbench page by setting up the pagination option in the Configuration tab.

Setting up allocations on the workbench



Basic allocation setup

This feature helps you to use allocation setup with ease especially while dealing with large accounts and allocation rules.

Configure basic allocation setup parameter to open the allocation setup UI in a lighter mode. Enabling basic allocation setup helps you to open the allocation setup page faster with minimal information, without having the UI loaded with the amount previews along with the accounts. Information in basic allocation setup is fetched only on demand.

Functionally, with basic allocation setup you can do all functions as in the regular allocation setup UI, where the primary purpose is to allocate bucket accounts and define rollup allocation rules. The icon indicators for buckets and rollups guide you when rules are defined in basic allocation setup.

Note:
If you are a non-analyst licensed customer, the **Basic Allocation Setup** option is enabled automatically even though the option is disabled if:

- The number of accounts in a segment exceeds the threshold value (4000)
- The total number of accounts in the cost model exceeds the threshold value (12000)

With this parameter enabled, you cannot view the following details:

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- The amount preview displayed in each of the accounts.
- The summary chart in the right pane.
- The **See relationships** link in the accounts. However, you can view the accounts that each account rolls up to, on demand, in the **Accounts Rolling Up** tab in accounts pop-up.

Missing money analysis

Note:

Missing money analysis is an extended and improved version of the allocation log functionality available before the Madrid release.

During the allocation setup stage, there is a possibility that the amount may not be rolled up correctly and the money may go missing during the process. The reasons can be due to errors in any of the following stages:

- Bucket Allocation
- Segment Rollup
- Account Rollup

Missing money logs provide details of why a part of the amount may be missing and fail to reach the target segment or account as per the allocation rules that have been set, and an actionable link to resolve issues.

To configure missing money logs, click the **Configuration** tab and toggle **Missing Money Analysis** to enable the logs. This action enables the **Missing Money Logs** ( ) icon in the allocation setup stage of the workbench.

Warning:
Enabling the log may delay the loading of the allocation setup page.

Missing money logs are categorized into segment rollup errors, account rollup errors, and bucket allocation errors listed in the choice list to help identify the missing amount during allocation and to categorically point out the incorrect rules and allocation issues. The segregation helps to resolve allocation and rollup issues quickly, and track how the money went missing instead of reaching its target.

Clicking the **Troubleshoot Errors/Warnings** link opens up a web page that guides you to take necessary actions with steps that you can follow to resolve each error.

View bucket contents

You can modify what you see in the list of buckets in the Bucketing stage of the IT Finance workbench.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

Procedure

1. Click the gear icon ( ) next to **Allocation Setup**.
2. Show or hide the buckets that are already assigned by clicking the **Show assigned buckets** toggle.
   You can assign the expenses in buckets to accounts for unassigned buckets only.

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3. Sort the accounts by selecting **Name** or **Amount** in the **Sort by** list.
4. Further sort the accounts by selecting **Ascending** or **Descending** from the Sort list.

   Click the information icon to view the records, which are saved in the General Ledger Cleansed Data [itfm_gl_data_cleansed] table, that belong to a bucket. The records open in the list view in a new browser tab or browser window.

Split buckets

Buckets contain groomed general ledger expenses. These expenses can be associated with items like a cost center, vendor, department, or location.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst
You can only split buckets that are not yet assigned to accounts.

About this task

You can split the expenses in a bucket by any of the attributes such as cost center, vendor, department, or location. Starting with Istanbul release, you can use any custom attributes to split buckets. Use Financial Data Source Field Map for bringing additional attributes to split a bucket by enabling the **Used for Bucket split** option.

For example, if a bucket includes expenses for two different vendors, you can split the bucket into two smaller buckets, one for each vendor. Each split bucket contains the groomed general ledger expense associated with that vendor.

Procedure

1. Open the Allocation Setup stage in the workbench.
2. In the **Allocation Setup** pane, click the split bucket icon ( ) for the bucket you want to split. The split bucket window appears, showing you the amount of money in the bucket.
3. From the **Split by** list, either select an attribute that is associated with the groomed general ledger expense or select **Percentage**.
   - If you select an attribute, the new buckets appear in the window with default names in the format [original bucket name] > [attribute name].
   - If you select **Percentage**, enter the percentages for the new buckets and give each bucket a name.
   - If you select **Weighted** split method, you have the choice to split the bucket amount to any segment in the hierarchy based on the available metric.

     Note:

     If the metric is Total weight configured, then you cannot split a bucket using that weighted metric.

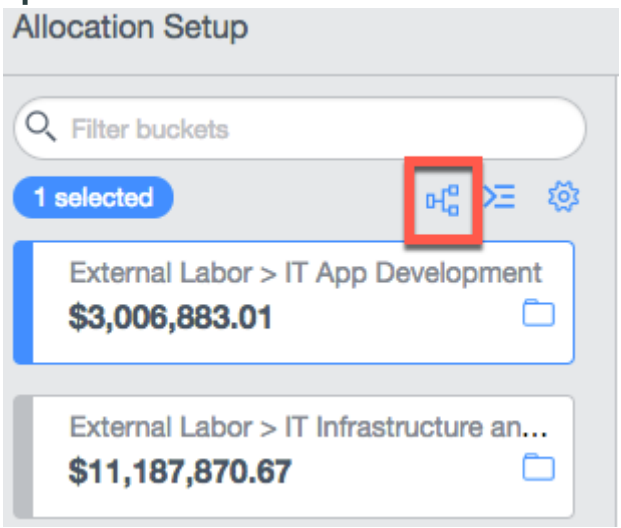
     After you split a bucket based on the **Weighted** method, you cannot split it further.

   A preview of the split buckets appears in the window along with the expense amounts for each bucket.
4. Click **Split Bucket**.
5. The application creates new buckets and splits the expenses among them according to your settings.

   Buckets that are split appear with a folder icon.

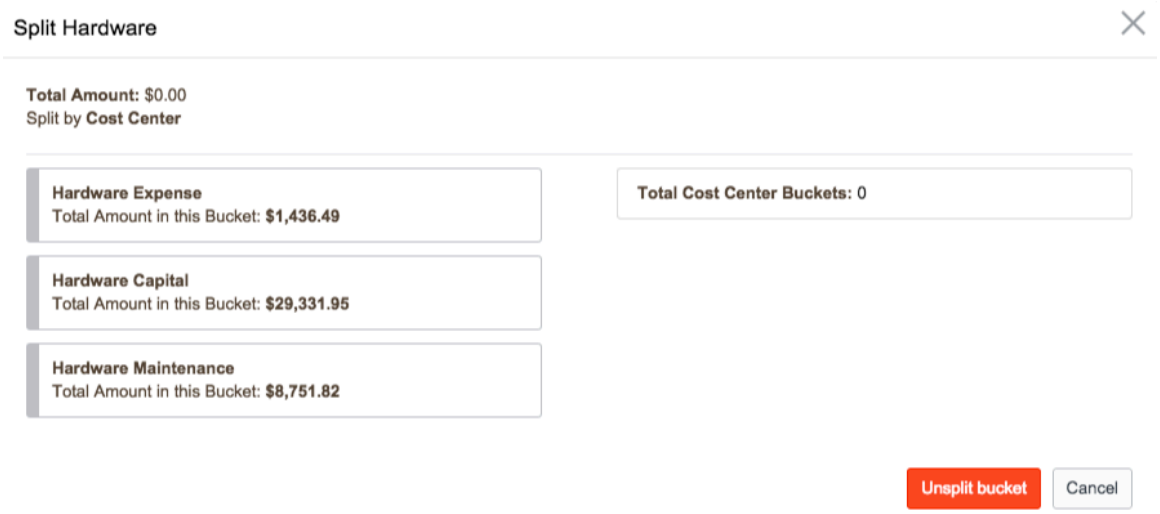
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Split bucket



6. To view a newly split bucket with the other buckets that were split along with it, click the folder icon.
7. To revert the bucket split, click **Unsplit Bucket**.

Splitting the hardware bucket



Rollups for allocations

A rollup is an allocation rule that specifies how a lower-level account in the segment hierarchy connects to other accounts above it in the hierarchy. Rollups allow you to allocate expenses to the lower-level account and have expenses automatically allocated to the higher-level accounts.

Rollups can be account-specific or segment-specific. Account-specific rollups specify how expenses roll up from one specific account to one or more accounts above it. Segment-specific rollups specify how expenses in all the accounts for a segment roll up to all the accounts in the segment above it, that is the parent level. You can also roll up segments to any segment preceding in the hierarchy, that is to the grandparent level.

Rollups specified for an individual account take precedence over the rollup specified for the segment. For example, if you create these two rollups:

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- An account-specific rollup that allocates expenses in the email account in the business service segment to the IT account in the business unit segment.
- A segment-specific rollup that allocates expenses in the business service segment to the business unit segment.

Then the account-specific rollup allocates the expenses. The segment-specific rollup does not allocate any expenses.

Account-specific level rollup supports rolling to any parent or grandparent account in the hierarchy. You can roll up the expenses to any account up in the hierarchy, and not necessarily to the immediate parent in the hierarchy.

Rollups can not only be up in the hierarchy, you can also roll up amounts to accounts in the sibling segments.

Configure the rollup at the account level to any parent segment in the hierarchy, by selecting the **Parent Segment** in the Rollups popup.

Total weight support for allocations using weighted metric

If you use a weighted metric that is enabled with total weight support, then the metric calculates the allocation percentage accurately in the following total weight calculations:

- At segment level rollup, where **allocate to** metric is used and accounts do not have any rollup, the total percentages of all accounts in the segment add up to be less than 100%.
- At segment level rollup, where **allocate to** metric is used, the percentage of each account in the segment is calculated based on the consumption weight of the account.
- At account level rollup, where the account level rollup rule overrides the segment level rollup rule, the total percentage of all accounts adds up to be less than 100%.
- At account level rollup, the percentage of each account is calculated based on the consumption weight of the account.
- When allocating a bucket amount to a segment, the total percentage allocated to the segment adds up to be less than 100%.
- When allocating a bucket amount to a segment, the percentage allocated individually to each account in the segment is calculated based on the consumption weight of the account.

View accounts that roll up to an account

You can view the accounts that roll up to another account.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

Procedure

1. Click the information icon (ⓘ) on an account.

   The account summary window appears, showing you:

   - The total amount of money currently assigned to this account.
   - The buckets that contribute expenses to this account.
   - The method that this account uses to roll up to the parent segments.

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- The accounts that roll up to this account.
- The accounts that this account rolls up to.

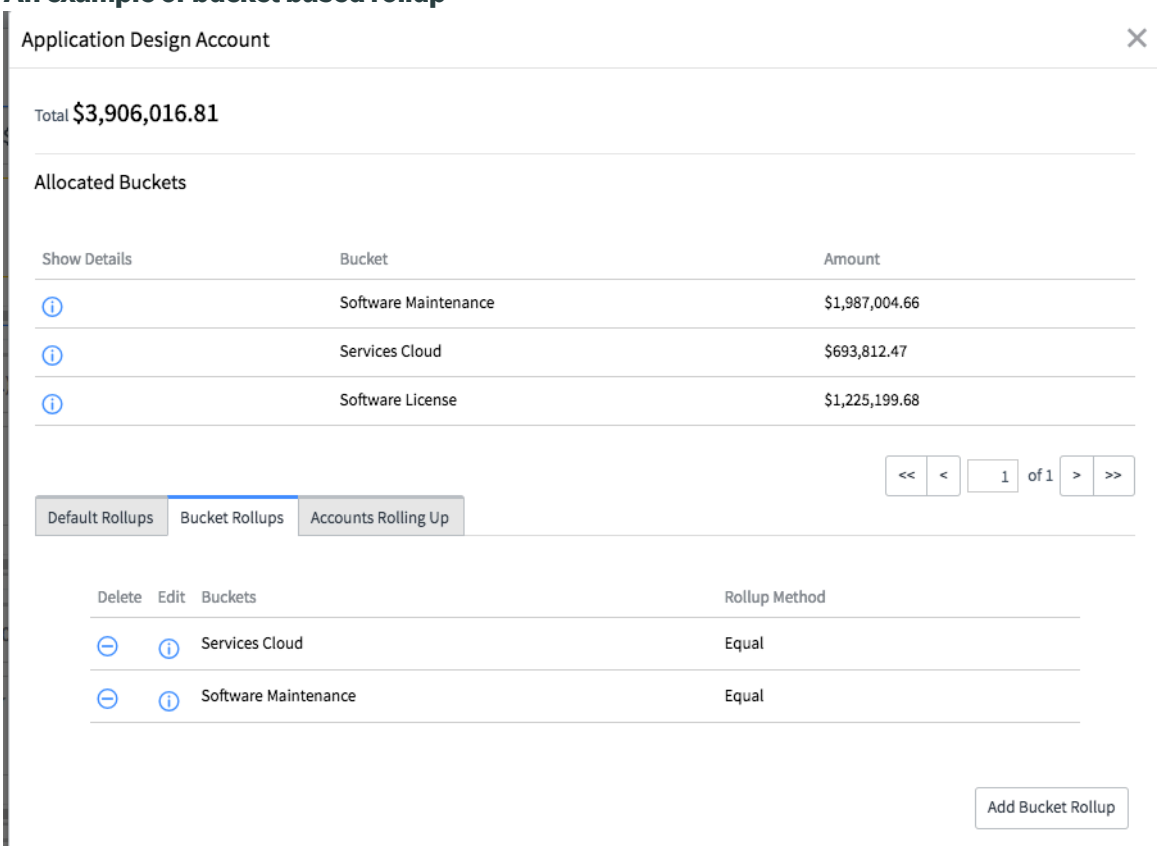
2. To see the buckets that are allocated directly to this account, click **Show allocated buckets**.
3. If you want to allocate one or more bucket amount (among all the buckets allocated to this account, as mentioned in step 2) to any specific account segment overriding the default rollups, then click the **Bucket Rollups** tab.

   You can do such a bucket based rollup using the None, Equal, Manual, Weighted, or Scripted methods.

   The other undefined buckets, which are not rolled up in this manner, follow the default rollup method.

   Navigate to **Financial Modeling** > **Cost Models** > **Allocation Rollups Override** to view the **From Account Segment**, **To Account Segment**, rollup metric, and type details of such an allocation.

An example of bucket based rollup



4. Click the **Accounts Rolling Up** tab if it is not selected.

   You can see the accounts that roll up, and the buckets that comprise the **Total** expenses for the account.

5. Click the information icon to view an account that rolls up or a bucket.
6. To sort the list, click the gear icon and choose the number of items per page and specify how to sort the items.

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Create rollups from one account to another account

You can create rollups from one account in the segment hierarchy to another account in a segment above it.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

Procedure

1. Click the hyperlink on the name of an account.

   The Account summary pop-up appears, showing you:

   - The total amount of money currently assigned to the account.
   - The buckets that contribute expenses to the account.
   - The method that the account uses to roll up to the parent segments.
   - The accounts that roll up to the account.
   - The accounts that the account rolls up to.
2. To see the buckets that are allocated directly to this account, click **Show allocated buckets** next to the **Total** value.
3. Click the **Rollups** tab if it is not selected.
4. Select a method from the **Rollup Method** choice list.

Option	Description
Segment's default method	Expenses follow the default rollup rule for CI relationships that was created during the Da ta Definition stage. This is the default option for items in the CMDB that roll up to other items in the CMDB.
None	Expenses do not roll up to any parent ac counts.
Equal	Expenses roll up to the parent accounts by the same percentage. Specify the parent ac counts.
Manual	Expenses roll up to the parent accounts by a percentage that you specify. Enter the amounts in the **Percentage** fields.
Weighted	Expenses roll up to parent accounts using a weighted metric that exists. The metrics avail able are those that specify a rollup to the seg ment that the parent account belongs to. If a metric has the **Enforce Relationship** option selected, the segment to which the child ac count belongs is also considered. If a met ric does not have the **Enforce Relationship** option selected, the segment of the child ac count is ignored.
Scripted	A script determines the rollup.

5. To link the account with an item above it, click **Add Rollup**.

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6. Select a value in the **Parent Segment** choice list.
7. Select an account from the **Parent Account** choice list.
8. If you selected the manual rollup method, enter the amounts in the **Percentage** field.
9. Enter as many rollups as necessary.
   The percentages must add up to 100%. To remove any of the accounts, click the delete icon ( ).
10. Click **Save Changes** after making your changes.
    The rollup rules appear in the right pane under the donut chart.
11. To see only those accounts that a selected account rolls up to, click the relationship icon ( ) on the account.

    Only the linked accounts appear. The color of the account that is assigned the expense is a randomly assigned color by the workbench. The color matches the account's color on the donut chart.

    The up arrow icon ( ) is indicative of rollups defined at segment or account level.
12. To show all accounts in the segment hierarchy again, click .

    When you create a rollup, the system automatically updates the system metric that is used to manage the segment relationships in the hierarchy. This metric is created by the application during the Data Definition stage.

Create rollups from one segment to another

A segment can roll up to the segment above it in the hierarchy using a weighted metric.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

Procedure

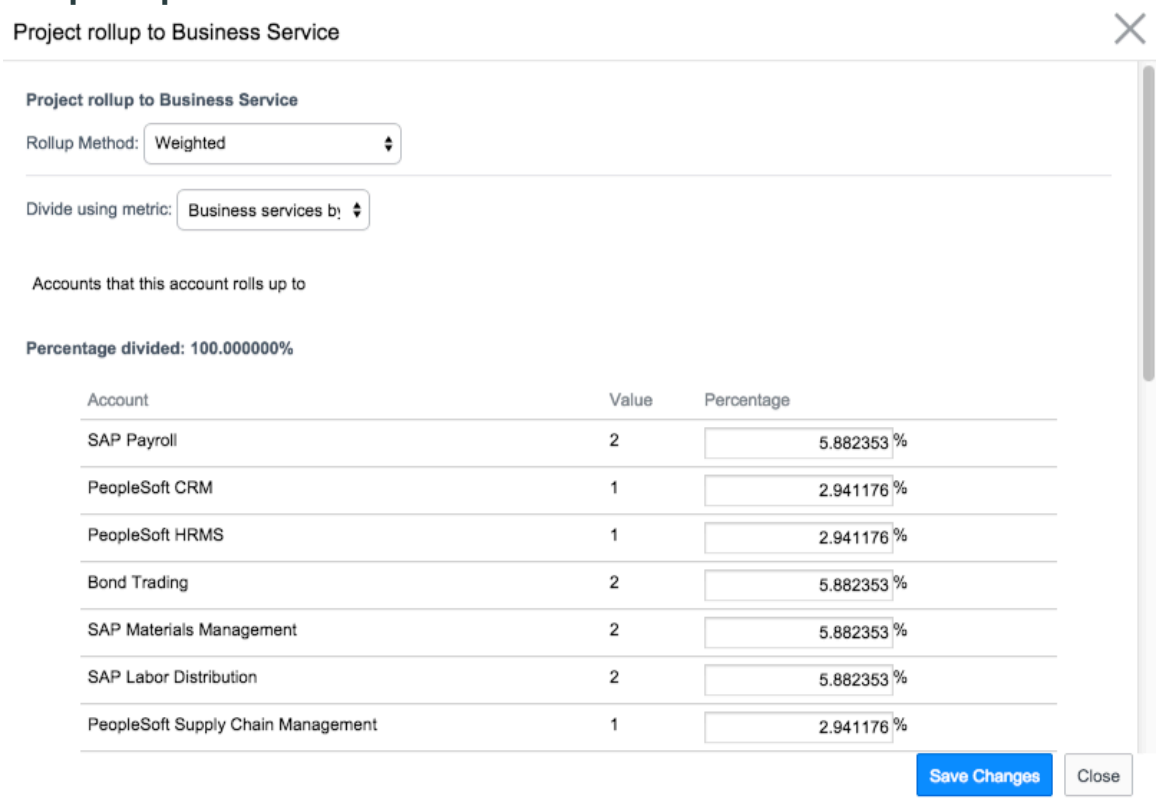
1. Click the information icon ( ) on a segment.
2. In the **Rollup Method** choice list, select **Weighted**.

   a. Select the metric in the **Divide using metric** choice list.
      The metric automatically weights the amounts by the values in the **Value** column.

   b. To further change the amounts, modify the values in the **Percentage** column.

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Rollup example



c. Click **Save Changes**.

3. In the **Rollup Method** choice list, select **Scripted**.

a. On the form, fill in the fields.

Segment form

Field	Description
Account Scope	Enabling the **Account Scope** check box executes the rollup script defined for each of the accounts at the segment level. Disabling the check box executes the default rollup defined at the segment level, thereby overriding the rollup defined for each account with the sys_id (FromAccountID). Instead of repeating similar rollup scripts for the accounts under a segment, you can provide the rollup scripts for individual accounts using the FromAccountID of each account. You can provide a default rollup for all the remaining accounts for which you have not provided the FromAccountID. You can provide all these rollups in a single script for execution.

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Field	Description
Script	The script to rollup the accounts.

b. Click **Update**.

Grouping segments by an attribute: You can categorize the segment accounts using the group by attribute if there are thousands of segment accounts. The accounts roll up to the grouped segments, just as they roll up to a non-grouped segment, and the allocation lines are generated in the itfm_allocation_breakdown table. Rolling up to grouped segments helps in better performance.

Edit rollup records

You can view and edit records for segment rollups and account rollup if necessary.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

About this task

Note:
As a good practice, use the workbench to create, modify, and delete rollups rather than modifying the scripts in the rollup records.

Procedure

1. Navigate to **All** > **Financial Modeling** > **Cost Models** > **Allocation Rollups** to access the rollups that are created from one account to another.
2. Click a rollup name to open it.
3. Make modifications, if necessary.

Bucket assignments

Setting up an allocation means assigning the expenses in a bucket to an account in a segment or to several accounts in a segment.

The expenses in the bucket automatically roll up based on the allocation rules you created for rollups. When you assign expenses, the application creates an allocation rule with the prefix BCK:ALLC: in the name and gives it an order value of 10 more than the highest value, not including the values for the rules created for rollups. Rules that the application creates for rollups have a default value of 1,000,000. The application also creates a method that specifies the percentage allocated to the account.

Assign a bucket to a segment or an account

During the Allocation Setup stage in the workbench, you can assign expenses from buckets to accounts in the hierarchy.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

Procedure

1. Drag a bucket to a specific account.

   You can also select multiple buckets and drag them to a specific account. If a bucket is allocated to an account, then the allocation method is always Allocate 100%.

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Alternatively, select one or multiple buckets. Click the **Assign bucket** icon ( ) that contains the expenses you want to assign to a single account or multiple accounts by performing the following steps:

a. Under **Allocate Method**, select allocate to an account.

b. Under **Allocate To Segment**, select a segment.

c. Under **Allocate to Account**, select the segment account to which you want to assign all expenses in the selected buckets.

d. On the other hand, to assign the selected buckets to multiple accounts, click **Go** with the default **Multiple Accounts** selected under **Allocate To Account**.

The Create Allocation Rule window appears showing you a list of **Selected Buckets** along with the selected account or option to choose the accounts in the selected segment. If you don't want to allocate a bucket, select and delete the bucket.

2. Drag a bucket to a segment or click the **Assign bucket** icon ( ) to assign a bucket to a segment.
You can assign a bucket to a segment one at a time. Multiple-bucket selection doesn't apply for segment assignment. If the bucket allocation is to a segment, then you must select the allocation method from the choice list.

Option	Description
Equal	Expenses are assigned to the accounts by the same percentage.
Manual	Expenses are assigned to the accounts by a specified percentage. Enter the amounts in the **Percentage** fields.
Weighted	Expenses are assigned to the accounts using a weighted metric. If the metric is configured with Total weight, you can't split a bucket using that weighted metric.

3. From the **Divide among** choice list, select a segment.
4. If you've selected a weighted method, select a preconfigured metric from the **Divide using metric** choice list.
The only metrics that are available are those metrics that specify the parent and child segments.
5. Click **Create**.
6. To know how the bucket amount was distributed previously to the segments or an account, click the bucket name.
The bucket opens up in a pop-up displaying a message on top. The message displays the allocation method by which the bucket amount has been distributed, and the name of the

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segment to which the amount has been assigned. If the assignment is by **Allocate to account** method, then the message also displays the account name and the percentage of allocation.

Sample message of bucket assignment information

'Facilities Data Center' bucket is distributed equally to 'Business Unit' segment

Review assigned expenses

Review the expenses assigned to accounts and verify the information is correct in the Total Amount Allocated section in the right pane.

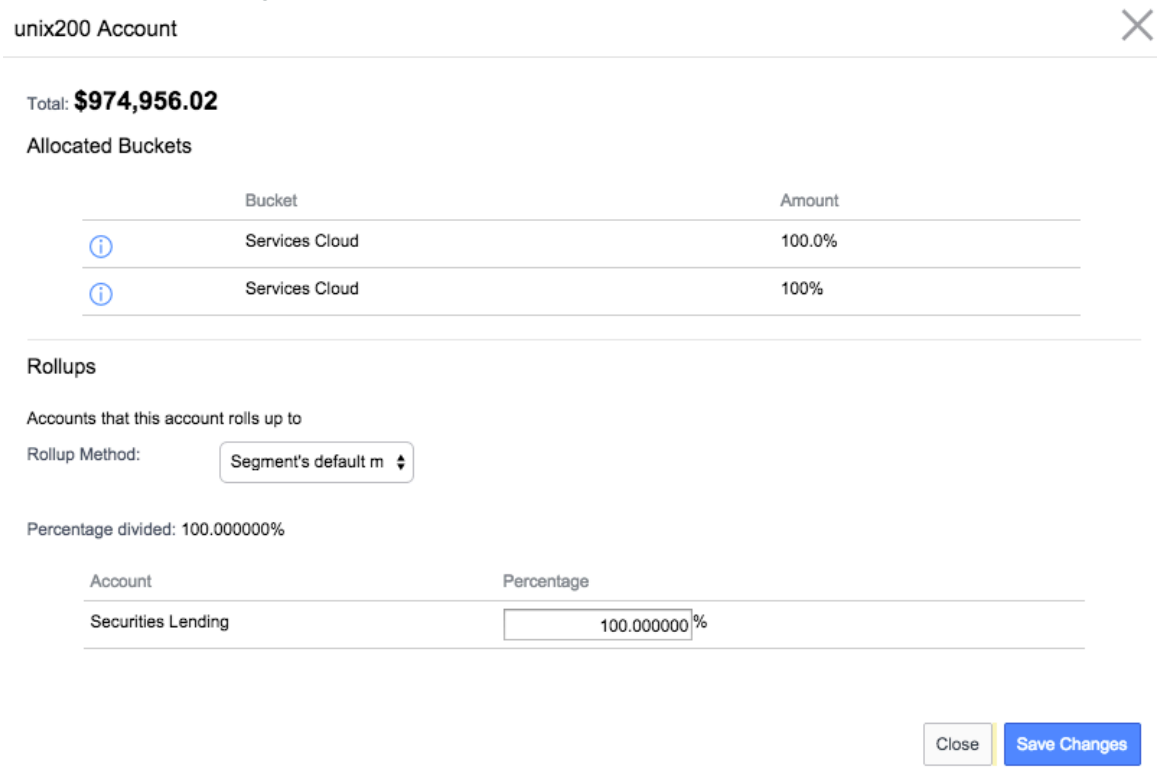
Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

Procedure

1. Click the information icon (ⓘ) on an account to view the allocation summary.
   The following information appears:
   - The total amount allocated.
   - The buckets that are assigned to the account.
   - The rollups to this account.
2. Click the information icon (ⓘ) next to the bucket to view the bucket summary.

An account summary window



Verify the total amount allocated

The donut chart on the right shows the assigned expenses for all segments.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

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About this task

By default, the calculations in both the donut chart and the segment hierarchy include data from the new rules that you created in the workbench, and any existing rules that you previously created. You can choose to turn off the pre-existing rules, called **User Rules**, so that you see only the calculations from your newly created rules.

Procedure

1. On the **Preview** tab, select a segment from the **Total Amount Assigned** list to view the allocation for that segment.
   The breakdown for each account appears below the donut chart.
2. To change whether or not to refresh the information in the donut chart automatically when you make changes, click the gear icon ( ) on an account to view the allocation summary, and click the **Refresh Automatically** toggle.

   The Preview tab

3. Click the **User Rules** tab to view the allocation rules and rollups that you manually set up outside of the workbench.
   On this tab, you can perform the following actions:
   - Click a rule name to open the Cost Allocation Rule form for that rule.
   - Click the preview icon ( ) to preview the allocation for that rule in the allocation viewer.
   - Click the **Show** check box to include allocation lines from existing, user-created rules in the calculations for assigned buckets. When you select this check box, the application includes existing allocation lines that are active on the accounts. The amounts that you see in the segments and in the donut chart are affected by the inclusion of these allocation lines. You shouldn't select this option if you want the calculated values to show only what you assign from buckets.
   - Click **See all rules** to see a list of all allocation rules in the application.

   The User Rules tab

Preview an allocation from a bucket

You can preview a graphical representation of how the workbench allocates the expenses in the bucket by opening the allocation viewer.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

Procedure

To open the viewer, click the allocation preview icon ( ) on the bucket.

Revert bucket assignments

Reverting bucket assignments means taking the expenses out of the segments and accounts and leaving it in the bucket. Reverting buckets also deletes existing allocation lines for the working fiscal period that are associated with this bucket.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

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About this task

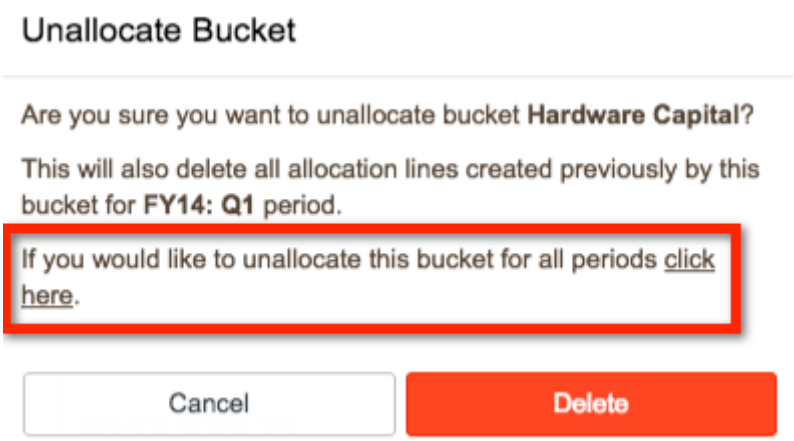
You can revert bucket assignments for a single bucket or all buckets.

Note:
You can also revert expenses outside the workbench.

Procedure

1. To revert bucket assignments for a single bucket, perform the following actions:
   a. Click the information icon on a bucket to open the account summary.
   b. Click **Unallocate Bucket**.
2. To revert bucket assignments for a single bucket and delete existing allocation lines for that working fiscal period, perform the following actions:
   a. Click the unassign bucket icon ( ) on the bucket.
   b. Click **Yes** on the confirmation window.
   c. You can also delete existing allocation lines for all fiscal periods by clicking **click here** on the confirmation window, and then clicking **Delete**.

The Unallocate Bucket window



3. To revert all bucket assignments, perform the following actions:
   a. Click the Gear icon ( ) next to **Allocation Setup**.
   a. Click **Unassign All Buckets**.
   b. Confirm the action.

The Allocation Review stage

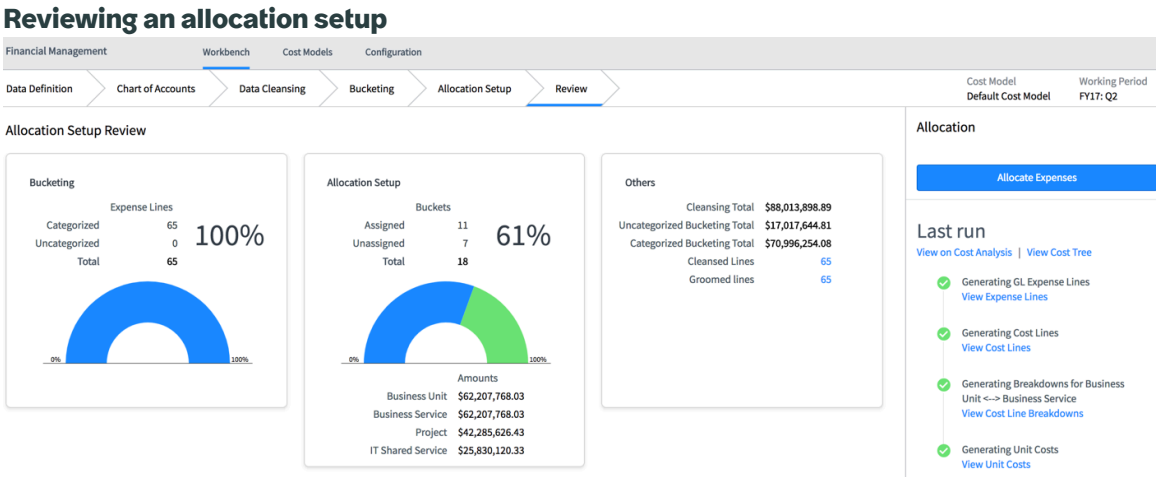
The Allocation Review stage allows you to review the allocation setup before you process the allocations.

Allocation Setup Review

On the Review page, these summaries are available:

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- **Bucketing**: The percentage of expenses that are assigned to buckets on the Bucketing stage.
- **Allocation Setup**: The percentage of buckets that are assigned to accounts in the segment hierarchy on the Allocation Setup stage.
- **Others**: Detailed allocation information, such as the expense amounts that are to be allocated to segments, the amount that was cleansed in the data cleansing stage, and the amounts in the unassigned buckets and assigned buckets.



Allocation

You can trigger allocation runs for multiple cost models for various fiscal periods concurrently by queuing the allocation jobs to the allocation engine. This also allows multiple users on the same instance to queue their requested allocation runs. When the allocation engine has completed an allocation run, a confirmation message appears.

- The engine automatically picks up the next job in queue after the current job is complete.
- You can queue any number of allocation jobs for multiple cost models and fiscal periods.
- You can cancel a job (stop the engine) when the job is in progress thereby saving the engine runtime for the next job in queue.
- You can also dequeue a job from the jobs that are in queue by removing it from the queue, if you do not want to run it.

With this enhancement, you can view the last run details of the cost model and its breakdown details with links to allocations and unit costs.

- **View on Cost Analysis**: View the cost lines for analysis.
- **View Expense Lines**: (For customers upgrading from a previous version to Xanadu) If you had enabled the **Generate GL Expense Lines** check box in the Financial Model form for the existing cost models, then you can view the GL expense lines of the cost model after the allocation engine is run. The GL expense lines will not be generated for the cost models you create after upgrading to Xanadu.

> **Important:**
> This feature is only available to customers who own an ITBM Analyst license.

- **View Cost Lines**: View the cost allocation aggregates.
- **View Cost Line Breakdowns**: The cost allocation breakdown aggregates for the cost model. If **Run On Demand Only** flag is set to true, then the allocation engine does not generate

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breakdown lines. To explicitly generate the breakdown lines, generate breakdown allocations in the **Breakdown Relationships** related list of the Financial Model form.

- **View Unit Costs**: View the unit costs.

You can also view the details of the current cost model that is in progress and the total number of allocation jobs in queue. Also, view the current job progress with the status of the current allocation run and its details.

View Cost Tree: View all the segment accounts contributing to the selected account in a hierarchical view. You can further drill, on each segment account, down in the hierarchy.

1. Click **View Cost Tree**.
2. Select a segment in the **Segment** choice list.
3. Select an account from the **Account** choice list.
4. Click **Go**.

Allocate expenses with the workbench

If any of this information looks incorrect, go back to a previous stage and make the necessary modifications.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

Procedure

1. Verify your allocation settings on the **Configuration** tab.
2. Navigate to the **Review** stage of the workbench.
3. Choose what kind of allocation lines you want to generate:
4. Click **Allocate Expenses**.

> **Note:**
> If you are a non-analyst licensed customer, ensure that the number of accounts in each segment and the total number of accounts in the cost model is within the threshold values 4000 and 12000 respectively.

Result

The system allocates the expenses, creates allocation lines, and changes the **State** field on the general ledger record to **Allocated**. The values of all allocation lines created from the allocation add up to the value of the general ledger expense. If no rules apply to the general ledger expense, no allocation lines are created and the state of the general ledger record remains **Unallocated**.

> **Note:**
> The system rounds allocation lines to two decimal places. An allocation totaling $100.495 is rounded up to $100.50. An allocation totaling $100.494 is rounded down to $100.49. If an allocation is rounded down to $0.00, the system does not create an allocation line.

The Cost Models tab

The **Cost Models** tab enables you to view all the existing cost models, clone a cost model from the existing cost models, and delete cost models that you do not need.

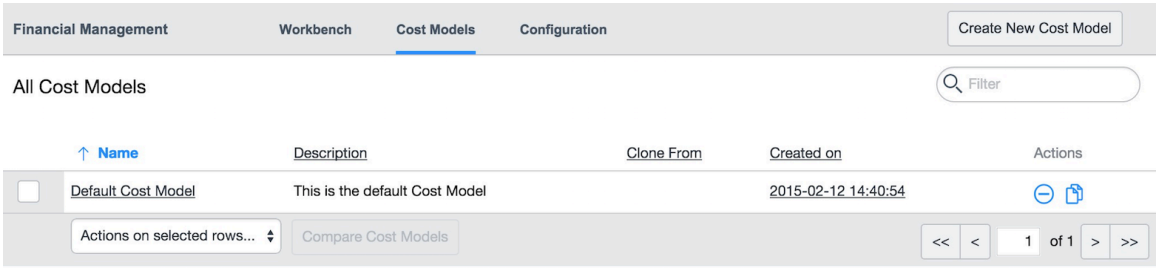
> **Important:**
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A list of cost models appears on this tab. You can perform several actions from here:

- Clone a cost model from an existing cost model.
- View settings for each cost model.
- Delete cost models.
- Import and export cost models.
- Compare cost models.

The Cost Models tab



Prescriptive cost models for shared services and business applications

L1 Costing – Shared Services provides a complete visibility of fully loaded IT infrastructure cost, infrastructure shared services showback, and lays foundation for future growth. L2 Costing – Business Applications provides cost of applications and end user, aligns applications to business units, furnishes cost information to support each business unit in business terms.

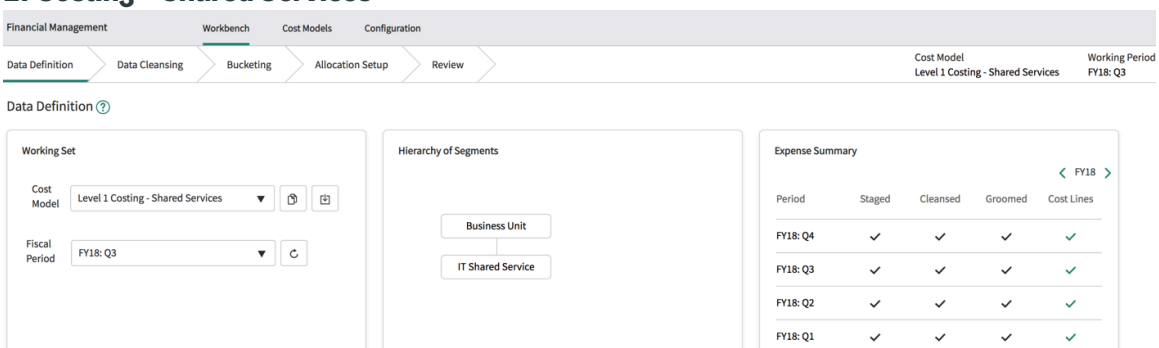
Important:

This feature is available only when you own an ITBM Analyst license.

L1 Costing – Shared Services

The specifications of the L1 Costing – Shared Services are:

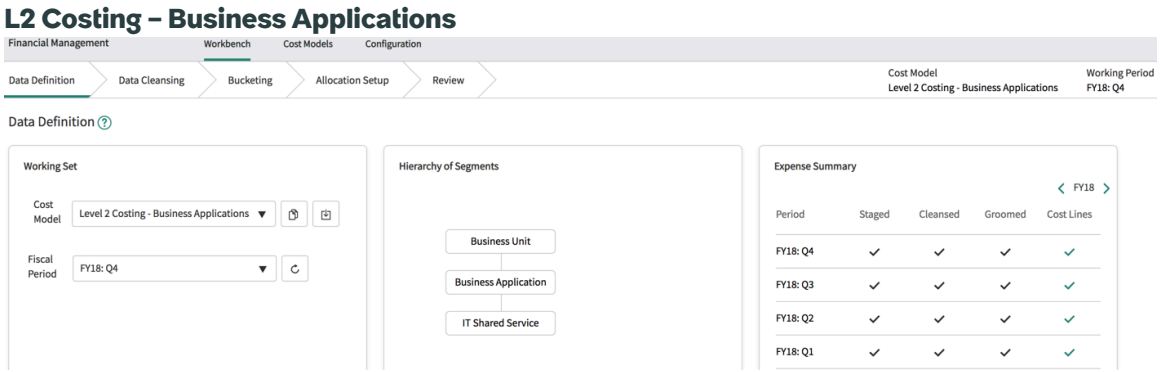
L1 Costing – Shared Services



- The cost bucket layer is tied to the ITFM bucket table [itfm_bucket] and the cost buckets are specific to a model.
- IT shared service segment accounts (the middle layer in this model) are sourced from the IT shared service table [itfm_shared_service].
- The business unit layer is tied to the platform business unit table [business_unit].

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L2 Costing – Business Applications



The specifications of the L2 Costing – Business Applications are almost the same as L1 Costing – Shared Services. However, there is an additional layer for applications. Enterprise Architecture (formerly APM) Business Application [cmdb_ci_business_app] table is the source of accounts to the applications segment. Or, it can be Application [cmdb_ci_appl] table or other custom tables.

Seeded IT Shared Services

IT Shared Service: Equip End Users

IT Shared Service: Equip End Users is a cost collection container that holds any money spent on providing the end users with personal (not shared) devices, the software that runs on these devices, and the support associated with making and keeping those devices functioning. This container excludes major device upgrades, lease cycle turnover, and other replenishment-related costs, which are captured within the Facilitate Ongoing Change container.

IT Shared Service: Facilitate Configuration Change

IT Shared Service: Facilitate Configuration Change is a cost collection container that holds money spent on supporting the ITSM Change, Release and Configuration Management processes. That is, any dollars spent on managing ongoing, daily, common, and ad-doc configuration changes. This includes activities like patching (non-security related), firmware updates, hardware/software configuration setting changes, installation, de-installation, and upgrade of hardware components, and general add, move, or change requests across the IT landscape. This container excludes major upgrades and changes across a large portion of the environment for which a project plan and/or funding would need to be secured.

IT Shared Service: Facilitate Connectivity

IT Shared Service: Facilitate Connectivity is a cost collection container that holds any money spent on providing all device network connectivity to the company, its computing and/or knowledge assets, the hardware and software to do it, and the support associated with making (and keeping) the access up. This includes all personal and enterprise devices. This container excludes monitoring hardware, software, and personnel costs, which are captured in the Monitor the Environment container.

IT Shared Service: Management and Overhead

IT Shared Service: Management and Overhead is a cost collection container that holds any money spent on IT executive compensation, as well as one-time charge items that apply to the existence of IT operations, compliance or audit costs, and otherwise uncategorised costs. This container excludes any costs captured or accounted for in any of the other IT process definitions.

IT Shared Service: Monitor the Environment

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IT Shared Service: Monitor the Environment is a cost collection container that holds the money spent on supporting the ITOM Event Management process; that is, any dollars spent on monitoring the entire IT landscape. This includes endpoint connectivity speeds, endpoint application performance testing, hardware/software/network/storage threshold checking, and fault and event correlation management tools used by operations management personnel. This container excludes security specific and/or cloud monitoring services mentioned in other process areas.

IT Shared Service: Perform Upgrades/Maintenance

IT Shared Service: Perform Upgrades/Maintenance is a cost collection container that holds money spent supporting the ITSM Change, Release and Configuration Management processes. That is, all dollars spent on managing major upgrades, either project planned and/or specifically funded. This includes activities such as widespread OS upgrades; hardware replacement cycle activities; and internal or third-party business or IT management software package release updates across the IT landscape. This container excludes ongoing, daily, common, and ad-doc configuration changes that only require a change ticket to be executed.

IT Shared Service: Provide Tech Support

IT Shared Service: Provide Tech Support is a cost collection container that holds money spent supporting the ITSM Incident, Problem and Knowledge Management processes. That is, any dollars spent on providing technical support services to end users across the organization. This includes tier 1, 2, and 3 personnel, incident or problem management software, root cause analysis time, routine or ad-doc assistance (password resets, how to Q&A), and/or standard operating procedure guidance. This container excludes actual configuration changes to end user and/or corporate assets performed by way of documented change tickets.

IT Shared Service: Run Business Applications

IT Shared Service: Run Business Applications is a cost collection container that holds any dollars spent on ongoing personnel time to keep business applications operating. This includes resources dedicated to applications and excludes IT or infrastructure operation costs.

IT Shared Service: Secure the Environment

IT Shared Service: Secure the Environment is a cost collection container that holds money spent on supporting the Security Operations. That is, any dollars spent on providing information security across the corporate IT landscape. This includes individual user endpoint devices, cloud applications, cloud computing, and/or on-premise computing resource of all types in addition to all desktops, laptops, smart phones, network gear, servers, databases, and applications. This excludes the physical security costs associated with datacenters, and office space card readers.

IT Shared Service: Store and Manage Data

IT Shared Service: Store and Manage Data is a cost collection container that holds any dollars spent on the underlying tools and foundational activities related to the management of structured and unstructured data (for example, encryption, backups, purging, archiving, migrations, and DR replication) and/or storage capacity (for example, reorganizations and excess capacity acquisition). It includes these types of activities and all the people power used to ensure the health of the data and storage landscape. This container excludes elements related to local storage on end user devices utilized by single individuals and specific activities, and allocated storage that can be related to specific applications or systems.

IT Shared Service: Supply Computing Power

IT Shared Service: Supply Computing Power is a cost collection container that holds any dollars spent on providing foundational elements that exist, cost money to maintain, but may never actually be used such as disaster recovery facilities or

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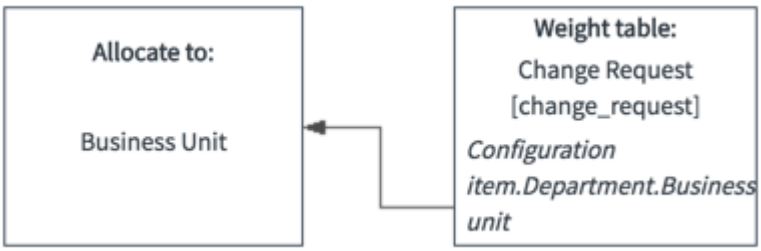
contracts, hardware spares inventory, on-premises UPS systems, and generators. It also includes daily active data center costs related to things such as space, power, and cooling.

ITFM prescribed metrics

Allocate to Business Unit based on Change Request volume based on CIs

The metric allocates shared service cost to business unit based on the following weighting table:

Allocate to Business Unit based on Change Request volume based on CIs



- The Change Request [change_request] table provides a list of all change requests and their related configuration item.
- The CMDB [CMDB_ci] provides a list of all configuration items and their related department.
- The Department [cmn_department] table provides a list of all departments and their business unit.
- The prescribed metric performs a count of change requests (for CIs) per business unit and weights the costs accordingly. Count number of CRs related to things requested by BUs (does not align with the allocations matrix) for the relevant fiscal period.

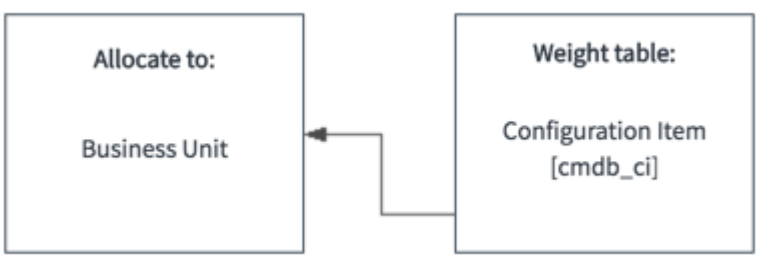
  The weight table enforces lifespan on this metric.

  - Duration start: Actual start.
  - Duration end: Actual end.

Allocate to Business Unit based on CI Count

The metric allocates shared service cost to business unit based on the following weighting table:

Allocate to Business Unit based on CI Count



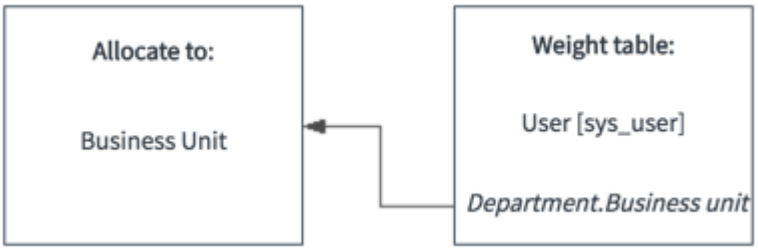
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- The CMDB [CMDB_ci] provides a list of all configuration items and their related department.
- The Department [cmn_department] table provides a list of all departments and their related business unit.
- The prescribed metric performs a count of configuration items per business unit and weights the costs accordingly.

Allocate to Business Unit on Headcount

The metric allocates shared service cost to business unit based on the following weighting table:

Allocate to Business Unit on Headcount



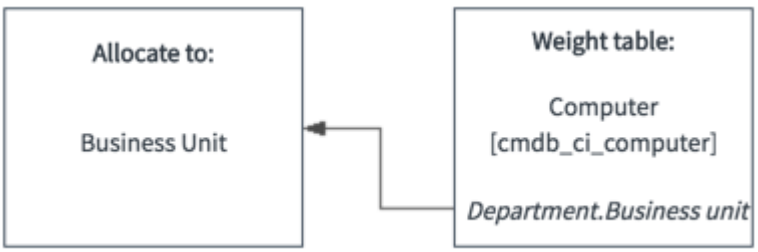
- The User [sys_user] table provides a list of all system users and their related department.
- The Department [cmn_department] table provides a list of all departments and their related business unit.
- The prescribed metric performs a count on the number of users per business unit and weights the costs accordingly.

  Filter criteria: Only count active users.

Allocate to Business Unit on Computer count

The metric allocates shared service cost to business unit based on the following weighting table:

Allocate to Business Units on Computer count



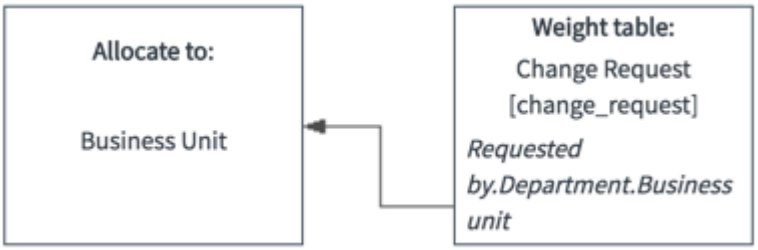
- The Computer [cmdb_ci_computer] table provides a list of all computer names and their related department.
- The Department [cmn_department] table provides a list of all departments and their related business unit.
- The prescribed metric performs a count on the number of computers per business unit and weights the costs accordingly.

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Allocate to Business Unit on Change Request volume

The metric allocates shared service cost to business unit based on the following weighting table:

Allocate to Business Unit on Change Request volume

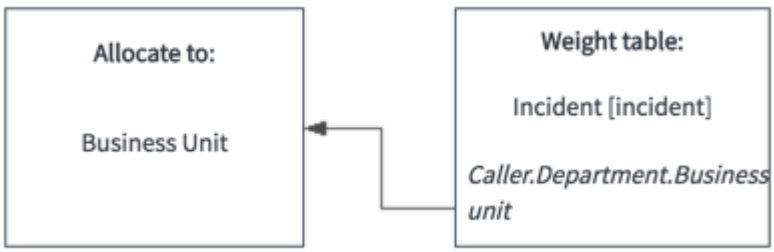


- The Change Request [change_request] table provides a list of all change requests and who requested it.
- The Department [cmn_department] table provides a list of all departments and their related business unit.
- The prescribed metric performs a count of change requests per business unit and weights the costs accordingly.
  - The weight table enforces lifespan on this metric.
  - Duration start: Actual start.
  - Duration end: Actual end.

Allocate to Business Unit based on Incident volume

The metric allocates shared service cost to business unit based on the following weighting table:

Allocate to Business Unit based on Incident volume

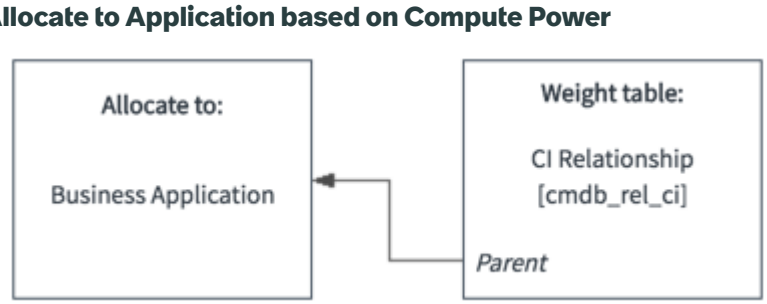


- The Incident [incident.list] table provides a list of all incidents and their related callers.
- The Caller [users [ITIL view]] table provides a list of all departments and their related business unit.
- The prescribed metric performs a count of incidents per business unit (opened and closed within the period) and weights the costs accordingly.

Allocate to Business Application based on Compute Power

The metric allocates shared service cost to applications based on the following weighting table:

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- The CI Relationship [cmdb_rel_ci] table provides a list of all relationships between configuration items.
- The prescribed metric performs a count of configuration items where the Child.Class = Server and weights the costs accordingly to the receiving applications.

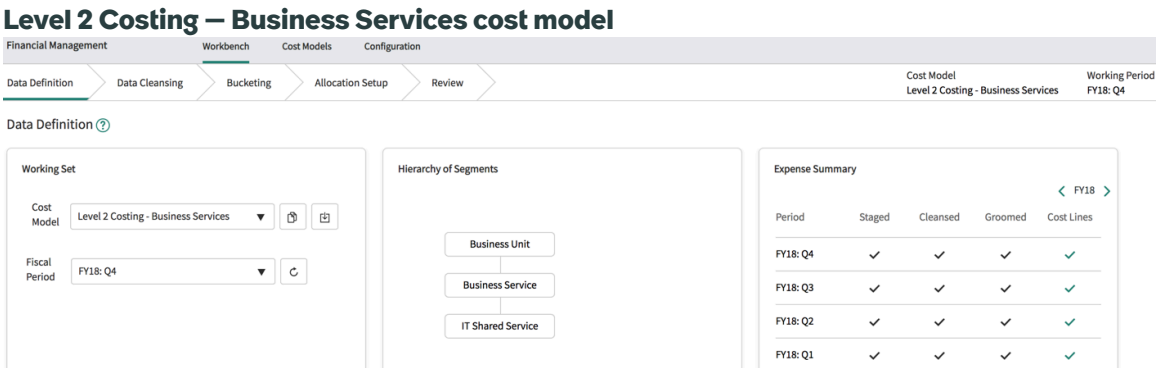
Prescriptive cost models for business services and business capabilities

Use the preconfigured business services and business capabilities cost models with their prescribed metrics for weight allocation. Understand the system requirements that each model supports, the allocation methods, and the datasets required to use them effectively.

Important:

This feature is available only when you own an ITBM Analyst license.

Level 2 Costing — Business Services cost model



The cost model provides:

- Cost of Enabling the Business: The expenses of the IT to ensure that the business is aligned to transformational initiatives.
- Cost to support each Business Service in business terms: The cost to provide business services.

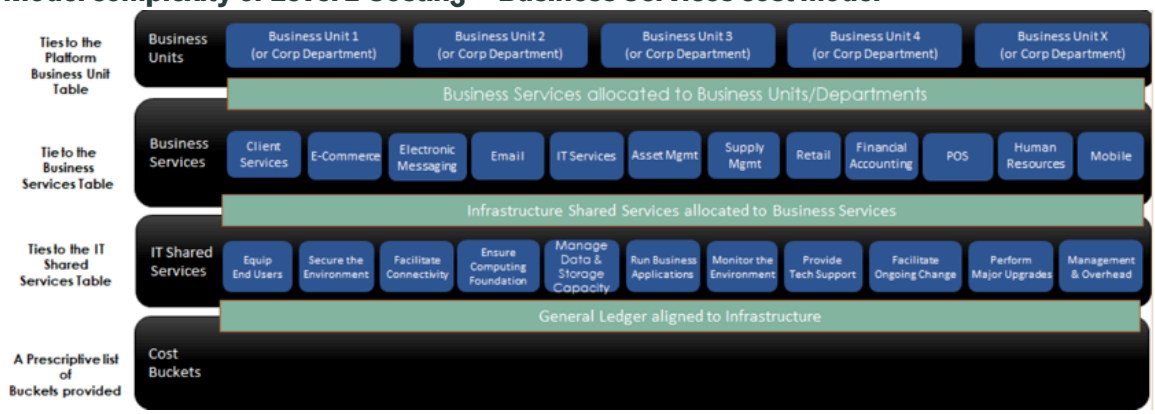
The cost model is recommended:

- At phase II or if you have previously invested in Financial Management.
- For showback in terms of core business functions or alignment to business capabilities.
- To provide insight into operational cost drivers.

Specifications of the Level 2 Costing — Business Services cost model:

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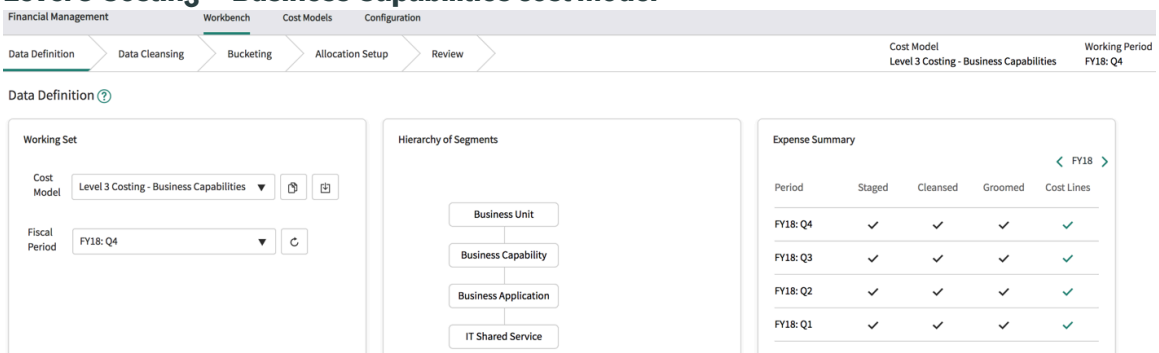
Model complexity of Level 2 Costing — Business Services cost model



- The cost bucket layer ties to the ITFM Bucket table [itfm_bucket]. Cost buckets are model specific.
- IT Shared Service segment accounts (the second layer in this model) are sourced from the IT Shared Service table [itfm_shared_service].
- Business Service segment accounts (the third layer in this model) are sourced from the Service table [cmdb_ci_service].
- The Business Unit layer ties to the Platform Business Unit table [business_unit].

Level 3 Costing — Business Capabilities cost model

Level 3 Costing — Business Capabilities cost model



The cost model provides:

- Cost of Enabling the Business: The expenses of the IT to ensure that the business is aligned to transformational initiatives.
- Cost to support each Business Capability in business terms: The cost of innovation.

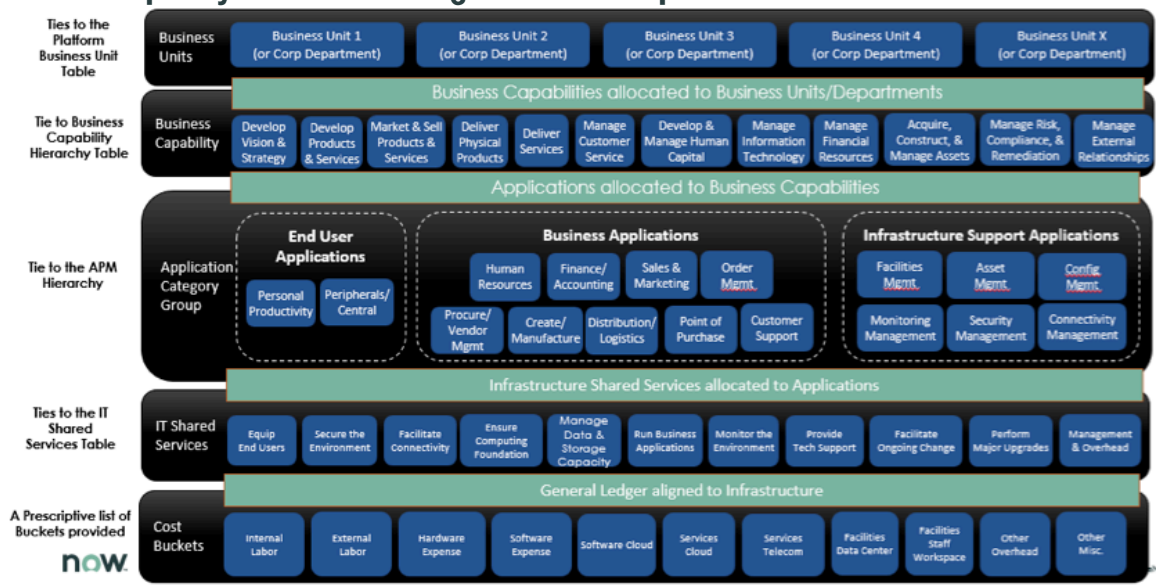
The cost model is recommended:

- At phase II or if you have previously invested in Financial Management.
- For showback in terms of core business functions or alignment to business capabilities.

Specifications of the Level 3 Costing — Business Capabilities cost model:

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Model complexity of Level 3 Costing — Business Capabilities cost model



- The specifications are similar to that of the Level 2 Costing — Business Services cost model, aligned to business application. However, there is an extra layer for business capabilities. The accounts in this segment are sourced from the Business Capability [cmdb_ci_business_capability] table, which is a flat list.
- There is a prescribed scripted metric that aligns the actual capability associated with an application with the high-level business capability in the table.

Rollup methods

Use the following allocation methods to move the cost from the cost buckets to the upper layers of the model (IT Shared Services, Allocations, or Business Units).

Rollup methods	Description
None	Does not allocate out to the next layer.
Equal	Equally splits the cost to each item it is related to.
Manual	Allocated by estimated or pre-calculated fixed percentages.
Weighted	Allocated based on actual usage. For example, allocate to BU based on change request volume, incident volume, or CI count or by a property of the object being allocated to, which is headcount.

The prescribed metrics support the **Weighted** rollup method, and source data directly from applications within the ServiceNow platform. For example:

- IT organizational structure: Business unit or department level.
- PPM or Time Card: Labor efforts charged to projects.
- CMDB: CI inventory with relationships, usage, and owner alignment.
- Asset Management: Asset inventory (end user and infrastructure) aligned to asset owners.

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- IT Service Management: Volume related to Incident, Problem, and Change.
- IT Operations Management: Relationships and alignment to hardware and applications.
- Enterprise Architecture (formerly Application Portfolio Management): Inventory of application hierarchy, associated business owner, and technology mapping.

Prescribed metrics - IT Shared Services to Business Services

Following are the descriptions of each metric with an explanation of the weighting methodology and their related tables within the ServiceNow system.

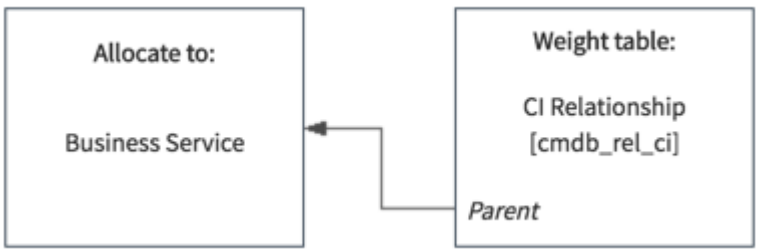
Note:
If the related tables have incomplete data or if there are gaps in the data, then the calculated weighting percentages are affected.

The preconfigured cost model begins with equal weighting to the next segment. Prescriptive metrics are available for more mature solutions.

Allocate to Business Service based on CI count

The metric allocates shared service cost to business services based on the following weighting table:

Allocate to Business Service based on CI count



- The CI Relationship [cmdb_rel_ci] table provides a list of all CIs and their relationship to their parent CI such as dependency, use, runs on, and contained by.
- The Service [cmdb_ci_service] table provides a list of all business services that are the parent CIs.
- The prescribed metric performs a count of CIs per parent and weights the cost to the business services accordingly.

  The weight table enforces lifespan on the following metric.

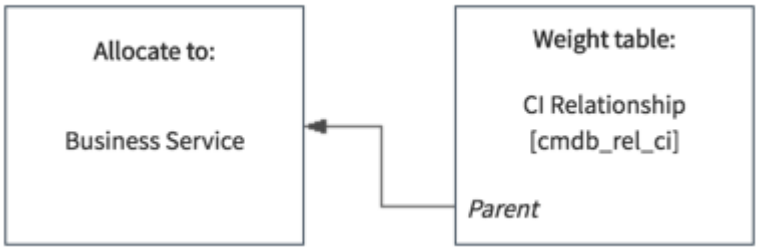
  - Filters: Child.Class is not Business Service and Type is Depends on::Used by.
  - Duration start: Actual start.
  - Duration end: Actual end.

Allocate to Business Service based on compute power

The metric allocates shared service cost to business services based on the following weighting table:

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Allocate to Business Service based on compute power



- The CI Relationship [cmdb_rel_ci] table provides a list of all CIs and their relationship to their parent CI such as dependency, use, runs on, and contained by.
- The Service [cmdb_ci_service] table provides a list of all business services, which are the parent CIs.
- The prescribed metric performs a count of CIs per server (Child.Class) and weights the cost to the (parent) business services accordingly.

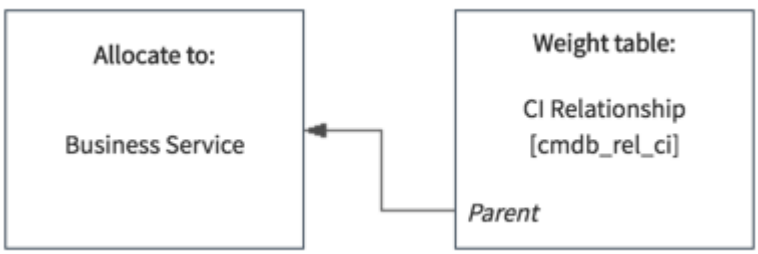
  The weight table enforces lifespan on the following metric:

  - Filters: Child.Class is Server and Type is Depends on::Used by.
  - Duration start: Actual start.
  - Duration end: Actual end.

Allocate to Business Service based on database count

The metric allocates shared service cost to business services based on the following weighting table:

Allocate to Business Service based on database count



- The CI Relationship [cmdb_rel_ci] table provides a list of all CIs and their relationship to their parent CI such as dependency, use, runs on, and contained by.
- The Service [cmdb_ci_service] table provides a list of all business services, which are the parent CIs.
- The prescribed metric performs a count of CIs per database (Child.Class) and weights the cost to the (parent) business services accordingly.

  The weight table enforces lifespan on the following metric:

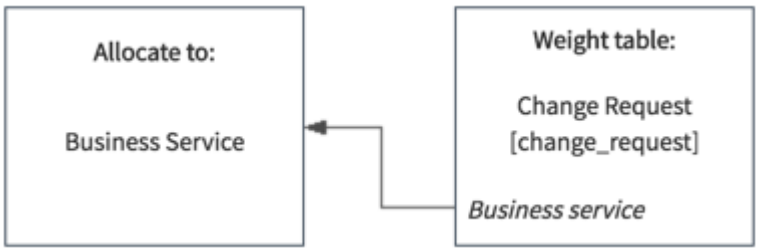
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- Filters: Child.Class is Database and Type is Depends on::Used by.
- Duration start: Actual start.
- Duration end: Actual end.

Allocate to Business Service based on change request volume

The metric allocates shared service cost to business unit based on the following weighting table:

Allocate to Business Service based on change request volume



- The Change Request [change_request] table provides a list of all change requests and who requested it including the related business service.
- The Service [cmdb_ci_service] table provides a list of all business services.
- The prescribed metric performs a count of change requests per business service and weights the costs accordingly.

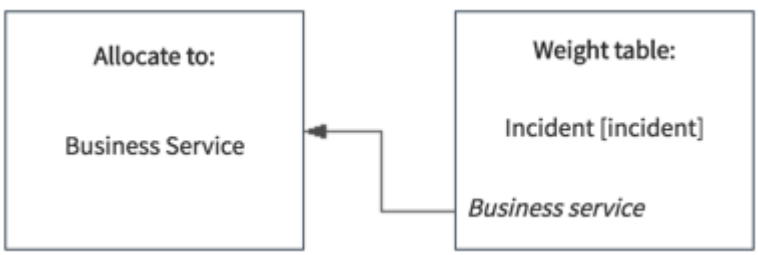
  The weight table enforces lifespan on the following metric:

  - Duration start: Actual start.
  - Duration end: Actual end.
  - Enforce lifespan selected on the weight table.

Allocate to Business Services based on incident volume

The metric allocates shared service cost to business unit based on the following weighting table:

Allocate to Business Services based on incident volume



- The Incident [incident.list] table provides a list of all incidents, their related callers, and the related business service.
- The Service [cmdb_ci_service] table provides a list of all business services.
- The prescribed metric performs a count of incidents per business service (opened and closed within the period) and weights the costs accordingly.

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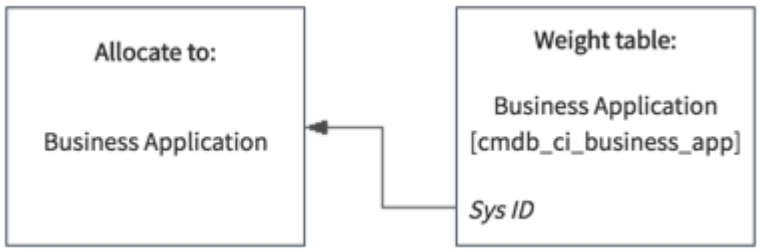
- Duration start: Opened.
- Duration end: Resolved.
- Enforce lifespan selected on the weight table.

Prescribed metrics - IT Shared Services to Business Applications

Allocate to Applications using active user count

The metric allocates shared service cost to applications based on the following weighted metric:

Allocate to Applications using active user count

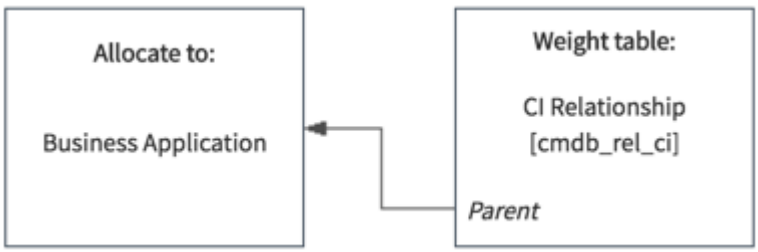


- The Business Application [cmdb_ci_business_app] table provides a list of all business applications.
- The prescribed metric performs a sum of active users and weights the costs accordingly to the receiving applications by **Sys ID**.

Allocate to Applications using database count

The metric allocates shared service cost to applications based on the following weighted metric:

Allocate to Applications using database count



- The CI Relationship [cmdb_rel_ci] table provides a list of all CIs and their relationship to their parent CI such as dependency, use, runs on, and contained by.
- The Business Application [cmdb_ci_business_app] table provides a list of all business applications, which are the parent CIs.
- The prescribed metric performs a count of CIs per database (Child.Class) and weights the cost to the (parent) business application accordingly.
  - Filters: Child.Class is Database and Type is Depends on::Used by.
  - Duration start: Actual start.
  - Duration end: Actual end.

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Prescribed metrics - Business Applications to Business Capabilities

Following is the scripted metric to allocate to business capabilities:

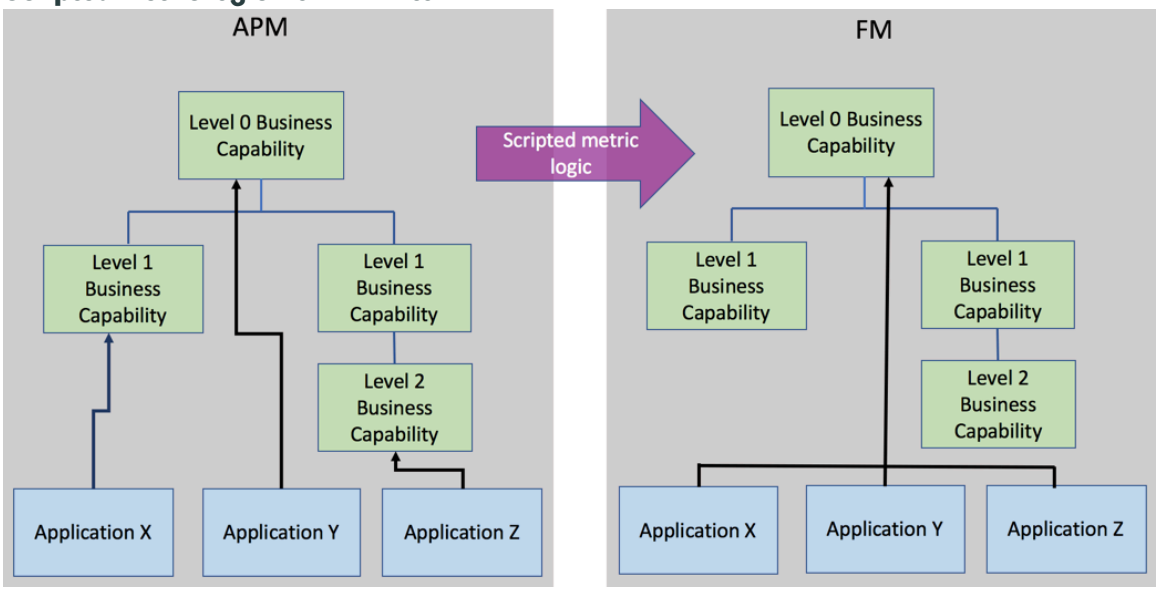
```
// Create a Scripted metric if you have complex logic to derive
 the weights for an Allocate to Segment.
//
// This Return Object is json:
// 1) key: The sys_id of the Allocate To segment's transaction
 table
// 2) value: the weight for the
//
// The API is called for each fiscal period and stored in weight
 Maps table which is in turn used in allocation.
// 'inputObject'  is available in the script to have access to
 fiscal period and from Account id.
// The  from account id is applicable only for "Allocate From"
 is part of metric setup where each entity in Allocate From
 table have their own weight distribution
// An 'inputObject' is injected during the evaluation of the
 script.
// It is an object of 2 key value pairs for fiscal period and
 allocate from accountId.
function getTopCapability(capabilityId){
  var now_GR = new GlideRecord('cmdb_ci_business_capability');
  gr.get(capabilityId);
   if(gr.isValidRecord())
    return getParentCapabilityRecur(now_GR);
 }
 function getParentCapabilityRecur(capabilityGr){
   if(JSUtil.nil(capabilityGr.parent))
    return capabilityGr;
  else
    return
 getParentCapabilityRecur(capabilityGr.parent.getRefRecord());
}
getScriptedWeightedMetric();
function getScriptedWeightedMetric(){
var appId = inputObject.from_id; // where inputObject.from_id
 is one of the Business Applications Id from Allocate From
 segment(Business Applications)
var relGr= new GlideRecord('cmdb_rel_ci');
relGr.addEncodedQuery('parent.sys_class_name=cmdb_ci_business_ca
pability^child.sys_class_name=cmdb_ci_business_app');
relGr.addQuery('child',appId);
relGr.query();
var retObj={};
 while(relGr.next()){
   retObj[getTopCapability(relGr.parent).getUniqueValue()] = 1;
 }
 return retObj;
}
```

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- The Business Capability [cmdb_ci_business_capability] table provides a list of all business capabilities and is part of Enterprise Architecture (formerly Application Portfolio Management).
- The script, in essence, flattens the business capability list.

Note:
Everything should be related to its Level 0 Business Capability for Financial Modeling although applications within Enterprise Architecture (formerly Application Portfolio Management) may be assigned to lower-level capabilities.

Scripted metric logic from APM to FM



View settings for each cost model

You can create a basic cost model from the Data Definition stage of the Workbench or from the Cost Models tab.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

Procedure

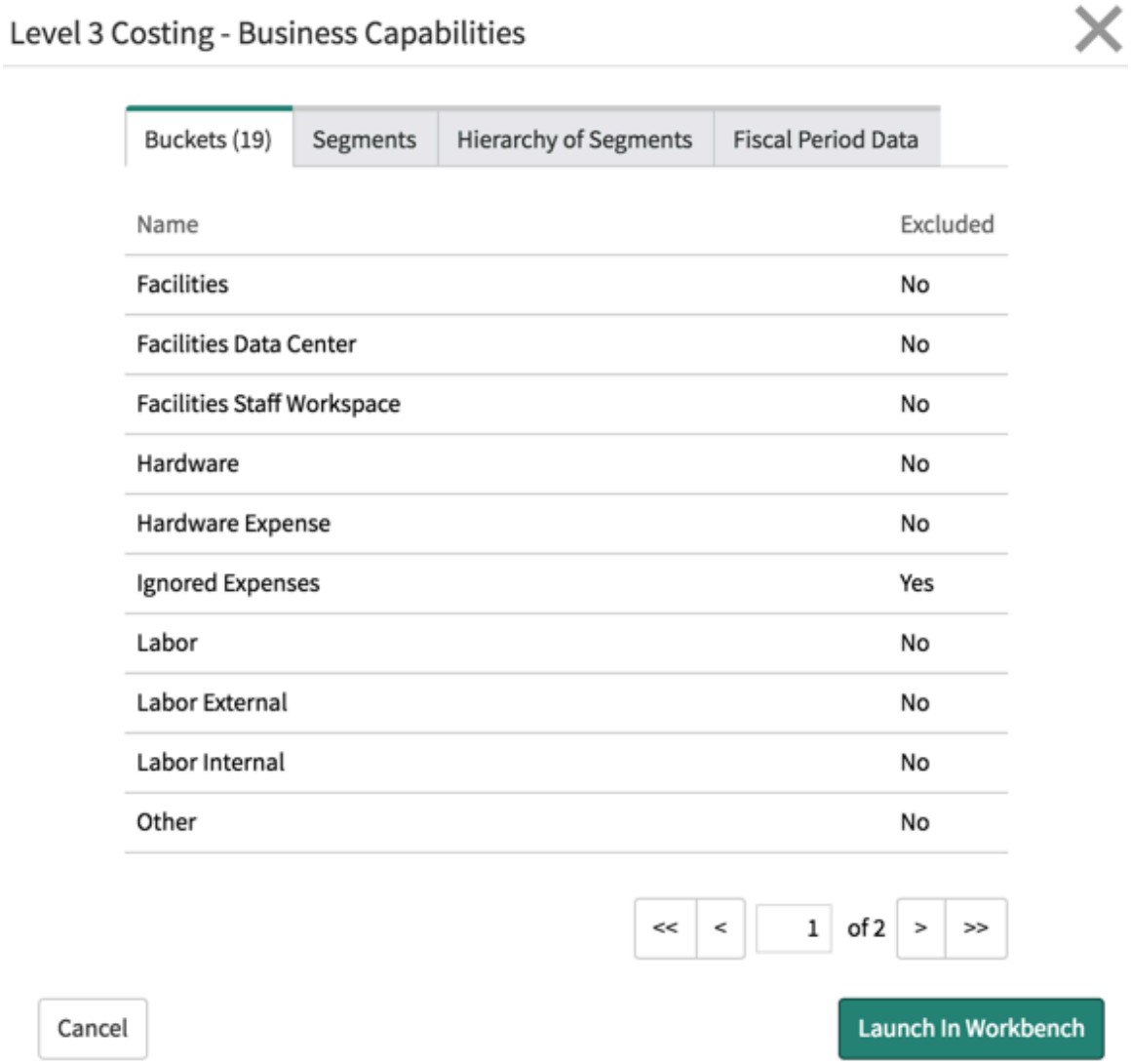
1. Open the **Cost Models** tab on the workbench.
2. Click the name of the cost model to review.

   A window appears with these tabs:

   - **Buckets**: The account buckets currently associated with the cost model. A bucket can be associated with only one cost model.
   - **Segments**: The segments that the cost model uses from the hierarchy of segments definition.
   - **Hierarchy of Segments**: The segment hierarchy of the cost model.
   - **Fiscal Period Data**: The expense summary for all fiscal periods.

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An example cost model summary



3. Click **Launch in Workbench** to open the cost model in the Data Definition stage of the workbench, or click **Cancel** to close the window.

Delete a cost model

You can delete cost models if you no longer need them.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

Procedure

Perform one of the following steps:

- Open the **Cost Models** tab on the workbench and click the delete icon.
- Open the **Cost Models** tab on the workbench, select the check boxes next to the models to delete, and select the **Delete** action from the choice list.
- Navigate to **Financials** > **Cost Models**, open the cost model record, and click **Delete**.

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Compare cost models

You can compare any two cost models to see the differences in bucketed expenses, the hierarchy of segments, and allocation data for a fiscal period.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

About this task

Compare cost models if you want to see how the expenses in a potentially new cost model breakdown into allocations. The data shown in the cost model comparison is actual data from the bucketing stage and actual allocation data. If you didn't yet complete the bucketing and allocation stages in the workbench, no data appears.

You can only compare two cost models at a time.

Procedure

1. Open the **Cost Models** tab on the workbench.
2. Select the check boxes next to the cost models that you want to compare.
3. Click **Compare Cost Models**.
4. Select a fiscal period.
5. Click any of the following items.

Option	Description
Buckets	The amounts in each bucket and subbuck et. Click **Collapse All** or **Show All** to hide or show all the buckets.
Hierarchy	Hierarchy of segments.
Data	Allocation data for each segment that has costs allocated to it.

6. You can also change cost models by selecting a new model from the **Current Cost Model** or **Proposed Cost Model** lists on either side.

Clone a cost model

If you want to create a cost model based on an existing one, you can clone a cost model.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

Important:

This feature is available only when you own an ITBM Analyst license.

About this task

When you clone a cost model, all data related to cleansing conditions, allocations, buckets, hierarchy of segments and rollups are copied over to the new cost model. Allocation lines are not cloned. You still need to perform allocations to generate allocation lines and run reports on the new allocation data.

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Procedure

1. Open the **Cost Models** tab on the workbench.
2. Click the clone icon for the cost model you want to clone.
3. On the form, fill in the fields.

Clone Cost Model form

Field	Description
Name	The name of the new cost model.
Description	A description of the new cost model.
Clone From	The cost model you are basing the new cost model on.

4. Click **Create**.

Create breakdown relationship

Define a breakdown relationship between required segments to view cost lines generated between the segments.

Before you begin

Role required: cost_transparency_admin

Procedure

1. Navigate to **All** > **Financial Modeling** > **Cost Models** > **All**.
2. Click **New** in the Breakdown Relationships related list.
3. On the form, fill in the fields.

Breakdown Relationship form

Field	Description
Cost Model	Cost model from the list.
X Segment	Segment name from the list. You can also create a new segment using the Segment Definitions form.
Y Segment	Segment name from the list. You can also create a new segment using the Segment Definitions form.
Run On Demand Only	Option to manually generate the cost line breakdowns on demand. By default, the flag is set to false, which means the allocation engine generates breakdowns for the related segments of the cost model. If the flag is true, then the allocation engine will not generate the cost line breakdowns.

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4. Click **Submit**.

   Leftover calculation for breakdowns

   The cost lines generated for the amounts coming to the segment indirectly from other segments, which are not part of a breakdown relationship with the segment, or by direct bucket allocations to the segment are the leftovers.

   If you want to calculate the leftovers for a breakdown, then set the system property *com.glide.financial_management.generate_breakdown_leftovers* to true.

   Run On Demand Only

   Use the option to generate the cost lines breakdowns on demand. This option helps in optimal usage of the allocation engine runtime.

5. To manually generate the cost lines for a breakdown, navigate to the **Breakdown Relationships** related list of the Financial Model form.
   a. Select the check box next to the breakdown and click **Generate Breakdown Allocations** action from the **Action on selected rows** list.
   b. Enter the fiscal period in the Generate Breakdown Allocations dialog box.
   c. Click **OK**.
6. To view the cost lines of the breakdown that you manually generated, navigate to the **Review** stage of the Financial Management workbench.
7. Click the **View Cost Line Breakdowns** link of the breakdown.
   You can view the cost lines in the Cost Allocation Breakdown list.

The Configuration tab

The Configuration tab provides you with additional settings.

These sections are presented:

- **General Settings**: View the system currency in use for the application and control the level of detail on the allocation lines that the application creates.
- **Main Report Configuration**: Configure settings for the main Financial Management report that appears on the CIO Dashboard .
- **Advanced Actions**: Revert allocations for expenses or delete allocation lines.

Configure general settings

Configure the level of detail for allocation lines on the **Configuration** tab of the workbench.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

About this task

You can vary the level of detail that is available on allocation data. The application can keep track of Sys_IDs of segment values in the allocation line tables, which allows you to dot-walk on allocation reports. This might have a performance impact on your application, depending on the number of allocation lines you generate.

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Procedure

1. On the workbench, click the **Configuration** tab.

   The currency code for the base system currency is shown in the **General Settings** pane.

   Note:

   Until Kingston release, you can use `com.glide.financial_management.currency_code` property to get the currency code. The property was removed in London release. If you are an upgraded customer in London, you can still use this property. Currently, `glide.system.locale` is the functional currency.

   To get the currency code, use the new scriptable `SNC.FMCurrency().getGlobalCurrencyCode()` API irrespective of you being an upgraded or a new customer.

2. Enable the **Basic Allocation Setup** to open the allocation setup UI in a lighter mode.

   Note:
   If you are a non-analyst licensed customer, the option is enabled automatically if the number of accounts in a segment or the total number of accounts in the cost model exceeds the threshold values 4000 and 12000 respectively.

3. Enable **Missing Money Analysis** to enable the log in the Allocation Setup page of the Workbench.

   Missing money analysis is an extended and improved version of the allocation log functionality that was available before the Madrid release.

4. **Display Records per segment** is a configuration setup that helps you to choose the number of accounts such as 5, 10, 15, 25, or 50 of a segment for display in the Allocation Setup page of the workbench, Allocation Setup page of lighter workbench, and the Cost Lines Analysis page.

Configure main report settings

Configure settings for your main financial report, including which cost models and fiscal periods are represented.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

About this task

The main financial report provides the basis for the Financial report on the CIO Dashboard and on other report overviews. The main setting that you can configure for the main report is which cost model that the application uses to generate reports for each fiscal period. If you have the financial admin or analyst role, you can select the cost model in the report parameters of the default reports. If you have the financial user role, the cost model is determined by these settings.

Procedure

1. On the workbench, click the **Configuration** tab.
2. Select a cost model from the **Main Cost Model** list.
   The main financial report includes this cost model when new fiscal periods are added.
3. Click **Update configurations**.

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4. On the Cost Model Selection window, select the cost model for each fiscal period.
   The report uses this cost model to calculate and display the data that you see on the main financial report.
5. Click **Save**.

Delete allocation lines

On the **Configuration** tab of the workbench, you can delete the allocation lines for any fiscal period if you no longer need this data, or if you need to make changes to segments or fiscal periods that are already associated with allocation lines.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

Procedure

1. Open the workbench and go to the **Configuration** tab.
2. Under **Advanced Actions**, next to **Delete Data For**, select the fiscal period.
3. Click **Delete**.
4. Confirm the action.

Missing money logs factoring tips

The error type and the possible causes and resolution tips help you to troubleshoot the errors easily.

Note:
Missing money analysis is an extended and improved version of the allocation log functionality available prior to Madrid.

Missing money logs and resolution

Category	Condition	Cause	Action
Bucket Allocation	Bucket Data Validation: '{0}' is excluded: {1} but one of its sub-buckets is not: {2}	Either parent or child buckets ({Test Parent Bucket}/{Test Child Bucket}) are excluded from allocation	Contact Customer Service and Support
Bucket Allocation	Bucket Allocation: '{0}' is allocated to an invalid segment	Bucket {Test Parent Bucket} is with corrupted target segment	Revert and reassign the bucket. 1. Click the error message to highlight the bucket. 2. To revert the bucket assignment, click the revert bucket assignment ( ) icon. 3. Assign a bucket to a segment or an account.

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
Bucket Allocation	Bucket Allocation: '{0}' is allocated to a segment {1} that is not associated with the current cost model	Bucket {Test Parent Bucket} is allocated to a segment that is NOT associated with the current cost model	Revert and reassign the bucket. **1.** Click the error message to highlight the bucket. **2.** To revert the bucket assignment, click the revert bucket assignment ( ) icon. **3.** Assign a bucket to a segment or an account.
Bucket Allocation	Bucket Allocation: '{0}' is using a weighted allocation method, but no metric is specified	{Test Bucket} is using weighted allocation method, but metric is not specified	Revert and reassign the bucket. **1.** Click the error message to highlight the bucket. **2.** To revert the bucket assignment, click the revert bucket assignment ( ) icon. **3.** Assign a bucket to a segment or an account.
Bucket Allocation	Bucket Allocation: '{0}' is allocated using an invalid allocation metric	{Test Bucket} is using weighted allocation method, but an invalid metric is used	Revert and reassign the bucket. **1.** Click the error message to highlight the bucket. **2.** To revert the bucket assignment, click the revert bucket assignment ( ) icon. **3.** Assign a bucket to a segment or an account.
Bucket Allocation	Bucket Allocation: '{0}' is allocated to an unspecified account	{Test Bucket} is allocated to an unspecified account	Revert and reassign the bucket.

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
			1. Click the error message to highlight the bucket. 2. To revert the bucket assignment, click the revert bucket assignment ( ) icon. 3. Assign a bucket to a segment or an account.
Bucket Allocation	Bucket Allocation: '{0}' is allocated to an invalid account	{Test Bucket} is allocated to an invalid account	Revert and reassign the bucket. 1. Click the error message to highlight the bucket. 2. To revert the bucket assignment, click the revert bucket assignment ( ) icon. 3. Assign a bucket to a segment or an account.
Bucket Allocation	Bucket Allocation: '{0}' is missing mandatory manual allocation information	In the {Test Bucket} allocation, one of the manually allocated lines has missing information (Transaction Account or Transaction Segment or Percentage allocation)	Fill in the missing mandatory information such as the transaction account, transaction segment, percentage allocation. 1. Click the link to navigate to the Bucket Allocation Account form. 2. Enter the missing mandatory information such as the transaction **Segment**, transaction **Account**, and the

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
			Percentage in the respective fields. **3.** Click **Update**.
Bucket Allocation	Bucket Allocation: '{0}' is manually allocated to an invalid segment: '{1}'	{Test Bucket} is manually allocated and one of the allocated lines has an invalid segment {Test Segment}	Correct the segment information in the bucket allocation account. **1.** Click the link to navigate to the Bucket Allocation Account form. **2.** Select the segment from the **Segment** choice list. **3.** Click **Update**.
Bucket Allocation	Bucket Allocation: '{0}' is manually allocated to an invalid account {1} in the segment {2}. {3}% of amount is lost	{Test Bucket} is manually allocated to an invalid account {Test Account} in the segment {Test Segment}. {Amount}% of amount may be lost	Correct the account information in the bucket allocation account. **1.** Click the link to navigate to the Bucket Allocation Account page. **2.** Select the account from the **Account** choice list. **3.** Click **Update**.
Bucket Allocation	Bucket Allocation: '{0}' is manually allocated with a missing or invalid percentage value	{Test Bucket} is manually allocated with a missing or invalid percentage value	Correct the percentage in the bucket allocation account. **1.** Click the link to navigate to the Bucket Allocation Account page. **2.** Enter correct percentage in the **Percentage** field. **3.** Click **Update**.
Bucket Allocation	Bucket Allocation: '{0}':- sum of the manual percentages	In the {Test Bucket} manual allocation,	Correct the allocation percentages in the

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
	is {1}% which is more than 100%	sum of the allocation percentages is 120%	bucket allocation accounts. **1.** Click the link to navigate to the Bucket Allocation Accounts list. **2.** Enter correct percentages in the **Percentage** column. **3.** Click the save () icon or press Enter after each entry.
Bucket Allocation	Bucket Allocation: '{0}':- sum of the manual percentages is {1}% which is less than 100%	In the {Test Bucket} manual allocation, sum of the allocation percentages is 70%	Correct the allocation percentages in the bucket allocation accounts. **1.** Click the link to navigate to the Bucket Allocation Accounts list. **2.** Enter correct percentages in the **Percentage** column. **3.** Click the save () icon or press Enter after each entry.
Bucket Allocation	Bucket Allocation: '{0}' manual allocation was chosen, but no accounts were specified	In the {Test Bucket} manual allocation, accounts have not been specified.	Revert and reassign the bucket. **1.** Click the error message to highlight the bucket. **2.** To revert the bucket assignment, click the revert bucket assignment () icon **3.** Assign a bucket to a segment or an account.
Bucket Allocation	Bucket Split for '{0}': sum of the split	Bucket Split for {Test Bucket}: Sum of the	Contact Customer Service and Support

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
	percentages is {1} which is less than 100	split percentages is 70%	
Bucket Allocation	Bucket Split for '{0}': sum of the split percentages is {1} which is more than 100	Bucket split for {Test Bucket}: Sum of the split percentages is 120%	Contact Customer Service and Support
Segment Rollup	Segment Rollup: '{0}': target segment is not in Hierarchy: {1}	The rollup of {Test Segment} segment has a corrupted target segment, which is not in the hierarchy.	Redefine the rollup for the segment. 1. Click the error message to highlight the segment. 2. Click the segment name. 3. Select the right segment from the choice list in the segment rollup pop-up. 4. Select the **Rollup Method** from the choice list. 5. Click **Save Changes**.
Segment Rollup	Segment Rollup: '{0}': target segment has not been specified: {1}	The rollup of {Test Segment} segment has a corrupted target segment.	Redefine the rollup for the segment. 1. Click the error message to highlight the segment. 2. Click the segment name. 3. Select the right segment from the choice list in the segment rollup pop-up. 4. Select the **Rollup Method** from the choice list. 5. Click **Save Changes**.

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
Segment Rollup	Segment Rollup: '{0}': target segment has not been specified: {1}	The rollup of {Test Segment} segment has a corrupted target segment.	Redefine the rollup for the segment. 1. Click the error message to highlight the segment. 2. Click the segment name. 3. Select the right segment from the choice list in the segment rollup pop-up. 4. Select the **Rollup Method** from the choice list. 5. Click **Save Changes**.
Segment Rollup	Segment Rollup: '{0}': target segment is not valid: {1}	The rollup of {Test Segment} segment has a corrupted target segment.	Redefine the rollup for the segment. 1. Click the error message to highlight the segment. 2. Click the segment name. 3. Select the right segment from the choice list in the segment rollup pop-up. 4. Select the **Rollup Method** from the choice list. 5. Click **Save Changes**.
Segment Rollup	Segment Rollup: '{0}': weighted rollup is chosen, but no metric is specified	The rollup of {Test Segment} segment has a corrupted metric.	Redefine the rollup for the segment. 1. Click the error message to highlight the segment. 2. Click the segment name.

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
			3. Select the right segment from the choice list in the segment rollup pop-up. 4. Select **Weighted** from the **Rollup Method** choice list. 5. Click **Save Changes**.
Segment Rollup	Segment Rollup: '{0}' rollup is using an invalid metric: {1}	The rollup of {Test Segment} segment has a corrupted metric.	Redefine the rollup for the segment. 1. Click the error message to highlight the segment. 2. Click the segment name. 3. Select the right segment from the choice list in the segment rollup pop-up. 4. Select **Weighted** from the **Rollup Method** choice list. 5. Click **Save Changes**.
Segment Rollup	Segment Rollup: '{0}': rollup script contains syntax errors	The rollup script defined for {Test Segment} segment has syntax errors.	The rollup script must be syntactically corrected on the Segment Rollup Override form. 1. Click the link to navigate to the Cost Allocation Rollup form. 2. Correct the syntax of the script in the **Script** field. 3. Click **Update**.

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
Segment Rollup	Segment Rollup: '{0}': {1} argument is missing in rollup of script for target Account {2}	{Test Segment}: {Test Argument} is missing in the rollup script for target account {Test Account}	The rollup script must be syntactically corrected. **1.** Click the link to navigate to the Cost Allocation Rollup form. **2.** Correct the syntax of the script in the **Script** field. **3.** Click **Update**.
Segment Rollup	Segment Rollup: '{0}': To transaction Segment is given empty/null for Scripted Rollup for to Account {1}	The rollup script defined for {Test Segment} segment has an invalid JSON return. One of the rollup values in JSON is Null.	The rollup script returns a JSON variable that must be corrected for a valid rollup value. Correct the script in the Cost Allocation Rollup form. **1.** Click the link to navigate to the Cost Allocation Rollup form. **2.** Correct the syntax of the script in the **Script** field. **3.** Click **Update**.
Segment Rollup	Segment Rollup: '{0}': To transaction Segment: {1} is invalid for Scripted Rollup for to Account {1}	The rollup script defined for {Test Segment} segment has an invalid JSON return. One of the rollup values in JSON is invalid.	The rollup script returns a JSON variable that must be corrected for a valid rollup value. Correct the script in the Cost Allocation Rollup form. **1.** Click the link to navigate to the Cost Allocation Rollup form. **2.** Correct the syntax of the script in the **Script** field. **3.** Click **Update**.
Segment Rollup	Segment Rollup: '{0}': To transaction	The rollup script defined for {Test	The rollup script returns a JSON

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
	Segment: {1} is not in hierarchy for Scripted Rollup for to Account {2}	Segment} segment has an invalid JSON return. One of the rollup values in JSON is not in the hierarchy.	variable that must be corrected for a valid rollup value. Correct the script in the Cost Allocation Rollup form. **1.** Click the link to navigate to the Cost Allocation Rollup form. **2.** Correct the syntax of the script in the **Script** field. **3.** Click **Update**.
Segment Rollup	Segment Rollup: '{0}': To transaction Account ({1}) of Segment ({2}) does not exist for Scripted Rollup	The rollup script defined for {Test Segment} segment has an invalid JSON return. One of the rollup values (Account) in JSON does not exist.	The rollup script returns a JSON variable that must be corrected for a valid rollup value. Correct the script in the Cost Allocation Rollup form. **1.** Click the link to navigate to the Cost Allocation Rollup form. **2.** Correct the syntax of the script in the **Script** field. **3.** Click **Update**.
Segment Rollup	Segment Rollup: '{0}': To transaction Account is null for Segment ({1}) does not exist for Scripted Rollup	The rollup script defined for {Test Segment} segment has an invalid JSON return. One of the rollup values (Account) in JSON is Null.	The rollup script returns a JSON variable that must be corrected for a valid rollup value. Correct the script in the Cost Allocation Rollup form. **1.** Click the link to navigate to the Cost Allocation Rollup form. **2.** Correct the syntax of the script in the **Script** field. **3.** Click **Update**.

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
Segment Rollup	Segment Rollup: '{0}': To transaction Account: {1} ({2}) is invalid for Scripted Rollup for to Account {3}	The rollup script defined for {Test Segment} segment has an invalid JSON return. One of the rollup values (Account) in JSON is invalid.	The rollup script returns a JSON variable that must be corrected for a valid rollup value. Correct the script in the Cost Allocation Rollup form. **1.** Click the link to navigate to the Cost Allocation Rollup form. **2.** Correct the syntax of the script in the **Script** field. **3.** Click **Update**.
Segment Rollup	Segment Rollup: '{0}' rollup is divided by no/invalid percent value for Scripted Rollup for to Account {1}	The rollup script defined for {Test Segment} segment has an invalid JSON return. One of the rollup percentage values is invalid.	The rollup script returns a JSON variable that must be corrected to sum up to 100%. Correct the script in the Cost Allocation Rollup form. **1.** Click the link to navigate to the Cost Allocation Rollup form. **2.** Correct the syntax of the script in the **Script** field. **3.** Click **Update**.
Segment Rollup	Segment Rollup: '{0}' scripted rollup is divided by percent {1}% which is more than 100%	The rollup script defined for {Test Segment} segment has an invalid JSON return. The sum of the rollup amount is 120%	The rollup script returns a JSON variable that must be corrected to sum up to 100%. Correct the script in the Cost Allocation Rollup form. **1.** Click the link to navigate to the Cost Allocation Rollup form.

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
			2. Correct the syntax of the script in the **Script** field. **3.** Click **Update**.
Segment Rollup	Segment Rollup: '{0}' scripted rollup is divided by percent {1}% which is less than 100%	The rollup script defined for {Test Segment} segment has an invalid JSON return. The sum of the rollup amount is 70%	The rollup script returns a JSON variable that must be corrected to sum up to 100%. Correct the script in the Cost Allocation Rollup form. **1.** Click the link to navigate to the Cost Allocation Rollup form. **2.** Correct the syntax of the script in the **Script** field. **3.** Click **Update**.
Account Rollup	Account Rollup: '{0}': target segment has not been specified: {1}	The rollup of '100 South Charles Street, Baltimore, MD' account has a corrupted target segment.	Redefine the rollup for the account. **1.** Click the error message to highlight the account. **2.** Click the account name. **3.** Delete the existing corrupt target segment by clicking the actions ( ) icon in the account rollup pop-up. **4.** Click **Add Rollup** button and select the target segment in the **To Segment** choice list. **5.** Select the **Rollup Method** from the choice list. **6.** Click **Save Changes**.

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
Account Rollup	Account Rollup: '{0}': target segment is not valid: {1}	The rollup of '100 South Charles Street, Baltimore, MD' account has a corrupted target segment.	Redefine the rollup for the account. **1.** Click the error message to highlight the account. **2.** Click the account name. **3.** Delete the existing corrupt target segment by clicking the actions ( ) icon in the account rollup pop-up. **4.** Click **Add Rollup** button and select the target segment in the **To Segment** choice list **5.** Select the **Rollup Method** from the choice list. **6.** Click **Save Changes**.
Account Rollup	Account Rollup: '{0}': target segment is not in Hierarchy: {1}	The rollup of '100 South Charles Street, Baltimore, MD' account has a target segment that is not in the hierarchy.	Redefine the rollup for the account. **1.** Click the error message to highlight the account. **2.** Click the account name. **3.** Delete the existing corrupt target segment by clicking the actions ( ) icon in the account rollup pop-up. **4.** Click **Add Rollup** button and select the target segment that is in the hierarchy in the **To Segment** choice list.

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
			5. Select the **Rollup Method** from the choice list. 6. Click **Save Changes**.
Account Rollup	Account Rollup: '{0}': target segment is not in Hierarchy: {1}	The rollup of '100 South Charles Street, Baltimore, MD' account has a corrupted target account	Redefine the rollup for the account. 1. Click the error message to highlight the account. 2. Click the account name. 3. Delete the existing corrupt target segment by clicking the actions ( ) icon in the account rollup pop-up. 4. Click **Add Rollup** button and select the target segment in the **To Segment** choice list. 5. Select the target account in the **To Account** choice list. 6. Select the **Rollup Method** from the choice list. 7. Click **Save Changes**.
Account Rollup	Account Rollup: '{0}': To transaction Account: {1} ({2}) is invalid	The rollup of '101 Broadway East, Seattle, WA' account rolls up to an invalid account.	Redefine the rollup for the account. 1. Click the error message to highlight the account. 2. Click the account name. 3. Delete the existing corrupt target segment by clicking

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
			the actions ( ) icon in the account rollup pop-up. 4. Click **Add Rollup** button and select the target segment in the **To Segment** choice list. 5. Select a valid account in the **To Account** choice list. 6. Select the **Rollup Method** from the choice list. 7. Click **Save Changes**.
Account Rollup	Account Rollup: '{0}': weighted rollup is chosen, but no metric is specified	The rollup of 'Development' account has a corrupt metric.	Redefine the rollup for the account. 1. Click the error message to highlight the account. 2. Click the account name. 3. Delete the existing target segment by clicking the actions ( ) icon in the account rollup pop-up. 4. Click **Add Rollup** button and select the target segment in the **To Segment** choice list. 5. Select a valid account in the **To Account** choice list. 6. Select the **Weighted** metric in the **Rollup Method** choice list.

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
			7. Select a valid metric in the **Select Metric** choice list. **8.** Click **Save Changes**.
Account Rollup	Account Rollup: '{0}': weighted rollup is chosen, but no metric is specified	Account Rollup: The rollup of 'Development' account has a corrupt metric.	Redefine the rollup for the account. **1.** Click the error message to highlight the account. **2.** Click the account name. **3.** Delete the existing target segment by clicking the actions ( ) icon in the account rollup pop-up. **4.** Click **Add Rollup** button and select the target segment in the **To Segment** choice list. **5.** Select a valid account in the **To Account** choice list. **6.** Select the **Weighted** metric in the **Rollup Method** choice list. **7.** Select a valid metric in the **Select Metric** choice list. **8.** Click **Save Changes**.
Account Rollup	Account Rollup: '{0}' is manually divided by a missing or invalid percentage value	The sum rollup percentage of 'HR' is 70%.	Redefine the rollup to sum up to 100% **1.** Click the link to navigate to the Cost Allocation Rollup Overrides list. **2.** Enter percentage for each record

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
			so that the percentages of all records sum up to 100% in the **Percent** column. **3.** Click the save () icon or press Enter after each entry.
Account Rollup	Account Rollup: '{0}' - sum of the manual percentage is {1}% which is more than 100%	The sum rollup percentage of 'HR' is 70%.	Redefine the rollup to sum up to 100% **1.** Click the link to navigate to the Cost Allocation Rollup Overrides list. **2.** Enter percentage for each record so that the percentages of all records sum up to 100% in the **Percent** column. **3.** Click the save () icon or press Enter after each entry.
Account Rollup	Account Rollup: '{0}' - sum of the manual percentage is {1}% which is less than 100%	The sum rollup percentage of 'HR' is 70%.	Redefine the rollup to sum up to 100% **1.** Click the link to navigate to the Cost Allocation Rollup Overrides list. **2.** Enter percentage for each record so that the percentages of all records sum up to 100% in the **Percent** column. **3.** Click the save () icon or press Enter after each entry.
Account Rollup	Account Rollup: '{0}' is equally divided by	'{0}' rollup override is equally divided by	Redefine the rollup to sum up to 100%

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
	a missing or invalid percentage value	no/invalid percent value.	**1.** Click the link to navigate to the Cost Allocation Rollup Overrides list. **2.** Enter percentage for each record so that the percentages of all records sum up to 100% in the **Percent** column. **3.** Click the save () icon or press Enter after each entry.
Account Rollup	Account Rollup: '{0}' is equally divided by percent {1}%, which is more than 100%	The rollup of '125 West South Street, Indianapolis, IN' account is more than 100% and may lead to unaccountable amounts.	Redefine the rollup to sum up to 100% on the Account Rollup Override form. **1.** Click the link to navigate to the Cost Allocation Rollup Overrides list. **2.** Enter percentage for each record so that the percentages of all records sum up to 100% in the **Percent** column. **3.** Click the save () icon or press Enter after each entry.
Account Rollup	Account Rollup: '{0}' is equally divided by percent {1}% which is less than 100%	The rollup of '125 West South Street, Indianapolis, IN' account is more than 100% and may lead to unaccountable amounts.	Redefine the rollup to sum up to 100% on the Account Rollup Override form. **1.** Click the link to navigate to the Cost Allocation Rollup Overrides list. **2.** Enter percentage for each record so that the percentages of all records sum up to

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
			100% in the **Percent** column. **3.** Click the save () icon or press Enter after each entry.
Account Rollup	Account Rollup: '{0}': rollup script contains syntax errors	The rollup script defined for the Facilitate Connectivity account has syntax errors.	The rollup script must be syntactically corrected on the account rollup override form. **1.** Click the link to navigate to the Cost Allocation Rollup Override form. **2.** Correct the syntax of the script in the **Script** field. **3.** Click **Update**.
Account Rollup	Account Rollup: '{0}': To transaction Segment {1} is given empty/null for Scripted Rollup Override for to Account {2}	The rollup script defined for the Facilitate Connectivity account has an invalid JSON return. One of the rollup values in JSON is null.	The rollup script returns a JSON variable that must be corrected for a valid rollup value. Correct the script on the Account Rollup Override form. **1.** Click the link to navigate to the Cost Allocation Rollup Override form. **2.** Correct the rollup value in the **Script** field. **3.** Click **Update**.
Account Rollup	Account Rollup: '{0}': To transaction Segment: {1} is invalid for Scripted Rollup Override for to Account {2}	The rollup script defined for the Facilitate Connectivity account has an invalid JSON return. One of the rollup values is Test Account, which is not a valid Business Unit.	The rollup script returns a JSON variable that must be corrected for a valid rollup value. Correct the script on the Account Rollup Override form.

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
			1. Click the link to navigate to the Cost Allocation Rollup Override form. **2.** Enter a valid rollupValue in the **Script** field. **3.** Click **Update**.
Account Rollup	Account Rollup: '{0}': To transaction Segment: {1} is not in the hierarchy for Scripted Rollup Override for to Account {2}	The rollup script defined for the Facilitate Connectivity account has an invalid JSON return. One of the rollupToSegment is Test Segment, which is not in the hierarchy.	The rollup script returns a JSON variable that must be corrected for a valid rollupToSegment. Correct the script on the Account Rollup Override form. **1.** Click the link to navigate to the Cost Allocation Rollup Override form. **2.** Enter a valid rollupToSegment in the **Script** field. **3.** Click **Update**.
Account Rollup	Account Rollup: '{0}': To transaction Account ({1}) of Segment ({2}) is given empty/null for Scripted Rollup Override	The rollup script defined for the Facilitate Connectivity' account has an invalid JSON return. One of the rollup values is given empty/Null.	The rollup script returns a JSON variable that must be corrected for a valid rollup value. Correct the script on the Account Rollup Override form. **1.** Click the link to navigate to the Cost Allocation Rollup Override form. **2.** Enter a valid rollupValue in the **Script** field. **3.** Click **Update**.
Account Rollup	Account Rollup: '{0}': To transaction Account is null for Segment ({1}) for	The rollup script defined for the Facilitate Connectivity account has an invalid	The rollup script returns a JSON variable that must be corrected for a

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
	Scripted Rollup Override	JSON return. One of the rollup values is given empty/Null.	valid rollup value. Correct the script on the Account Rollup Override form. **1.** Click the link to navigate to the Cost Allocation Rollup Override form. **2.** Enter a valid rollupValue in the **Script** field. **3.** Click **Update**.
Account Rollup	Account Rollup: '{0}': To transaction Account: {1} ({2}) is invalid for Scripted Rollup Override	Script returns invalid JSON. One of the rollup values is BlackBerry, which is not a valid Business Unit.	The rollup script returns a JSON variable that must be corrected for a valid rollup value. Correct the script on the Account Rollup Override form. **1.** Click the link to navigate to the Cost Allocation Rollup Override form. **2.** Enter a valid rollupValue in the **Script** field. **3.** Click **Update**.
Account Rollup	Account Rollup: '{0}' rollup override is divided with no/invalid percent value for Scripted Rollup Override for to Account {1}	One of the percentage values, rollup amount, is given Null or invalid value for rollup value 'test account'.	Correct the rollup amount in the script on the Account Rollup Override form. Correct the script on the Account Rollup Override form. **1.** Click the link to navigate to the Cost Allocation Rollup Override form. **2.** Correct the rollupAmount in the script.

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
			3. Enter a valid percentage value in the **Script** field. **4.** Click **Update**.
Account Rollup	Account Rollup: '{0}' rollup override is divided with no/invalid percent value for Scripted Rollup Override for to Account {1}	One of the percentage values is given Null or invalid for a missing rollup argument or rollup value.	Correct the rollup amount in the script on the Account Rollup Override form. Correct the script on the Account Rollup Override form. **1.** Click the link to navigate to the Cost Allocation Rollup Override form. **2.** Correct the rollupAmount in the script. **3.** Enter a valid percentage value in the **Script** field. **4.** Click **Update**.
Account Rollup	Account Rollup: '{0}' scripted rollup is divided by percent {1}% which is more than 100%	The rollup script defined for the Facilitate Connectivity account has an invalid JSON return. The sum of the rollupAmount is 120%.	The rollup script returns a JSON variable that must be corrected to sum up to 100%. Correct the script on the Account Rollup Override list. **1.** Click the link to navigate to the Cost Allocation Rollup list. **2.** Enter percentage for each record so that the percentages of all records sum up to 100% in the **Percent** column. **3.** Click **Update**.
Account Rollup	Account Rollup: '{0}' scripted rollup is	The rollup script defined for the	The rollup script returns a JSON

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
	divided by percent {1}% which is less than 100%	Facilitate Connectivity account has an invalid JSON return. The sum of the rollupAmount is 70%	variable that must be corrected to sum up to 100%. Correct the script on the Account Rollup Override form. **1.** Click the link to navigate to the Cost Allocation Rollup list. **2.** Enter percentage for each record so that the percentages of all records sum up to 100% in the **Percent** column. **3.** Click **Update**.
Account Rollup	Account Rollup: '{0}' has bucket-based rollup with invalid bucket	Account Rollup: '{0}' has bucket-based rollup with invalid bucket	Redefine the bucket rollup for the account. **1.** Click the error message to highlight the account. **2.** Click the account name. **3.** Click the **Bucket Rollups** tab. **4.** Delete the existing invalid bucket record by clicking the delete ( ) icon. **5.** Click **Add Bucket Rollup**. **6.** Select the bucket from the **Bucket** choice list in the bucket rollup pop-up. **7.** Select the **Rollup Method** from the choice list. See View accounts that roll up to an

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
			account for more information. 8. Click **Save Changes**.
Account Rollup	Account Rollup: '{0}' has bucket-based rollup where bucket has no parent	Account Rollup: '{0}' has bucket-based rollup where the bucket has no parent	Contact Customer Service and Support.
Account Rollup	Account Rollup: '{0}' has bucket-based rollup where bucket is not in the current cost model	Account Rollup: '{0}' has bucket-based rollup where the bucket is not in the current cost model	Redefine the bucket rollup for the account. 1. Click the error message to highlight the account. 2. Click the account name. 3. Click the **Bucket Rollups** tab. 4. Delete the existing bucket record by clicking the delete ( ) icon. 5. Click **Add Bucket Rollup**. 6. Select a bucket that is in the current cost model from the **Bucket** choice list in the bucket rollup pop-up. 7. Select the **Rollup Method** from the choice list. See View accounts that roll up to an account for more information. 8. Click **Save Changes**.
Account Rollup	Account Rollup: '{0}' has bucket-based rollup where bucket is	Account Rollup: '{0}' has bucket-based rollup where the	Redefine the bucket rollup for the account

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
	not at the lowest split level	bucket is not at the lowest split level	1. Click the error message to highlight the account. 2. Click the account name. 3. Click the **Bucket Rollups** tab. 4. Delete the existing bucket record by clicking the delete ( ) icon. 5. Click **Add Bucket Rollup**. 6. Select a bucket that is at the lowest split level from the **Bucket** choice list in the bucket rollup pop-up. 7. Select the **Rollup Method** from the choice list. See View accounts that roll up to an account for more information. 8. Click **Save Changes**.
Account Rollup	Account Rollup: '{0}' has bucket-based rollup divided manually for bucket '{1}' has a missing or invalid percentage value	Account '{0}' rollup override is manually divided with no/invalid percent value.	Redefine the rollup to sum up to 100%. 1. Click the link to navigate to the Cost Allocation Rollup Overrides list. 2. Enter percentage for each record so that the percentages of all records sum up to

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
			100% in the **Percent** column. **3.** Click the save () icon or press Enter after each entry.
Account Rollup	Account Rollup: '{0}' has bucket-based rollup divided manually for bucket '{1}' with percent {2}% which is more than 100%	The sum rollup percentage of 'HR' is 70%.	Redefine the rollup to sum up to 100%. **1.** Click the link to navigate to the Cost Allocation Rollup Overrides list. **2.** Enter percentage for each record so that the percentages of all records sum up to 100% in the **Percent** column. **3.** Click the save () icon or press Enter after each entry.
Account Rollup	Account Rollup: '{0}' has bucket-based rollup divided manually for bucket '{1}' with percent {2}% which is less than 100%	The sum rollup percentage of 'HR' is 70%.	Redefine the rollup to sum up to 100%. **1.** Click the link to navigate to the Cost Allocation Rollup Overrides list. **2.** Enter percentage for each record so that the percentages of all records sum up to 100% in the **Percent** column. **3.** Click the save () icon or press Enter after each entry.
Account Rollup	Account Rollup: '{0}' has bucket-based rollup divided equally for bucket '{1}' with a missing or invalid percentage value	'{0}' rollup override is equally divided with no/invalid percent value	Redefine the rollup to sum up to 100%. **1.** Click the link to navigate to the Cost Allocation Rollup Overrides list.

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
			2. Enter percentage for each record so that the percentages of all records sum up to 100% in the **Percent** column. **3.** Click the save () icon or press Enter after each entry.
Account Rollup	Account Rollup: '{0}' has bucket-based rollup divided equally for bucket '{1}' with percent {2}% which is more than 100%	The rollup of '125 West South Street, Indianapolis, IN' account is more than 100% and may lead to unaccountable amounts.	Redefine the rollup to sum up to 100% on the Account Rollup Override form. **1.** Click the link to navigate to the Cost Allocation Rollup Overrides list. **2.** Enter percentage for each record so that the percentages of all records sum up to 100% in the **Percent** column. **3.** Click the save () icon or press Enter after each entry.
Account Rollup	Account Rollup: '{0}' has bucket-based rollup divided equally for bucket '{1}' with percent {2}% which is less than 100%	The rollup of '125 West South Street, Indianapolis, IN' account is less than 100% and may lead to unaccountable amounts.	Redefine the rollup to sum up to 100% on the Account Rollup Override form. **1.** Click the link to navigate to the Cost Allocation Rollup Overrides list. **2.** Enter percentage for each record so that the percentages of all records sum up to

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Missing money logs and resolution (continued)

Category	Condition	Cause	Action
			100% in the **Percent** column. **3.** Click the save () icon or press Enter after each entry.

Cost models

A cost model is a set of rules, methods, and metrics that tell the application how to allocate expenses to the accounts in the hierarchy.

Cost models are associated with allocations and reports. If you own an ITBM analyst license, then you can create several cost models and choose the one you want to run the allocation engine against.

Cost models have the following attributes which give you more control over your expense allocation:

- **User Group**: Associate a cost model to a user group of type ITFM. Anyone with the appropriate financial model role can access the cost model (with the associated user group), provided the user is also part of the user group. With this association, you can restrict users who can access the cost model.
- **Fiscal Period**: Associate a cost model to a fiscal unit. The **Fiscal Period** field in the Data Definition stage of the financial modeling is set based on the fiscal unit that you have selected in the cost model. Hence, you can perform financial model activities for different fiscal periods (month, quarter, or a period).
- **Data Source**: Define the staged lines source for the cost model. Optionally, you can opt not to define a data source, in which case you can create groomed lines directly or enter the amount directly into the buckets.

If you own an ITBM analyst license you can use the prescribed cost models that the base system provides, other than the cost models that you can create. See prescriptive cost models for shared services and business applications, and prescriptive cost models for business services and business capabilities for the following cost models:

- Level 1 Costing — Shared Services
- Level 2 Costing — Business Applications
- Level 2 Costing — Business Services
- Level 3 Costing — Business Capabilities

If you are using Enterprise Architecture (formerly Application Portfolio Management) or Service Portfolio Management (SPM), then you can use one of the following cost models that depends on the application that you use:

- Business Application Costing
- Service Offering Costing

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Create a cost model from Cost Model form

You can create multiple cost models to process allocations. Use the Cost Model form to configure all possible settings available to the cost model.

Before you begin

Important:
This feature is available only when you own an ITBM Analyst license.

Role required: cost_transparency_admin

About this task

You can select a cost model in The Data Definition stage when you set up allocations. You can also clone a cost model in the workbench.

Procedure

1. Navigate to **All** > **Financial Modeling** > **Cost Models** > **All**.
2. Click **New**.
3. Fill in the form fields (see table).

Financial Model form

Field	Description
Name	Name of the cost model in accordance with its description, of up to 80 characters in length.
Description	Description of the cost model.
Used by Cost Allocation	Option to specify if the model is to be used for cost allocation.
Model Owner	The user who created the cost model.
Data Source	The source from where the data is taken. **Data Source** field is editable until financial model actions are not done. The application is preconfigured to point to the Budget Staged table as a data source for the Default Budget Cost Model as it is linked to ITFM Budget staged expenses. You also have the option not to select a data source. In such a case, the Workbench stages will not have the data cleansing stage as there is no financial data source to pull the expense lines from. Amounts would then be keyed in manually at the bucketing stage.
Used by Budgeting	Check box if the model is being used for budgets.

Cost Transparency section of the Financial Model form

Field	Description
Fiscal Unit	Defines the fiscal unit to be a month, quarter, or a period based on the fiscal calendar.

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Field	Description
Include Sub-Bucket info	If enabled, the generated cost lines and breakdown lines hold sub-bucket information.
User Group	The user group selected is associated with the cost model. This restricts access to the cost model by other user groups that are not associated with the user group of type ITFM. Users with the cost_transparency_analyst role can access default cost model and the cost model associated to their user group only. Users with cost_transparency_admin and system administrator roles can access all the cost models, including the default cost model. If the **Used by Budgeting** check box is enabled for the cost model, then users with appropriate budgeting role can view all the budget models. If the cost model is used for purposes of both budgeting and generating cost allocation lines, that is, if **Used by Cost Allocation** and **Used by Budgeting** check boxes are enabled, then all users can access the cost model.

4. Click **Submit**.
5. To run cost allocations, click **Allocate Expenses** button.

   Note:
   If you are a non-analyst licensed customer, ensure that the number of accounts in each segment and the total number of accounts in the cost model is within the threshold values 4000 and 12000 respectively.

   Use this option to run cost allocation from the cost model form and not necessarily from the workbench.

   a. Select the fiscal period in the Allocate Expense dialog box.

   b. Click **OK**.

      The allocation engine runs to generate cost allocations for the selected fiscal period. The engine does cleansing and bucketing. It allocates the expenses and creates allocation lines. However, if the cost model has no data source, the engine ignores the cleansing and bucketing stages and creates allocation lines.

6. To download the cost model, click **Download Cost Model** button.

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You can download the cost model for uploading it to, or deploying it in another instance to do cost modeling in a different pre-production environment. You can later move the cost model to other production environments.

With the ability to download the cost model you can also download all its related tables and the related elements such as segment definition and hierarchy, buckets, cleansing and grooming conditions, bucket allocations, rollups and rollup overrides, and consumption metrics.

7. To generate cost lines for leaf buckets associated to the cost model, click **Generate Bucket Cost** button.

   Use this option to generate bucket amount lines for this cost model that has no data source. Cost lines are generated for each leaf bucket that has no further sub-buckets. Even if there is no amount in the bucket, the amount lines are generated in the Groomed General Ledger Data [itfm_gl_data_groomed] table, populating zero in the **Amount** column. The table displays the bucket, sub-bucket, and amount associated with the cost model for the fiscal period that you selected.

   a. Select the fiscal period in the Generate Bucket Cost dialog box.

   b. Click **OK**.

      - If there is no amount in a bucket, the allocation engine still generates a groomed line with zero expense for the selected fiscal period of the cost model.
      - If there are pre-existing groomed lines with amounts in buckets for that fiscal period, then the engine does not overwrite those cost lines.

      You can edit the **Amount** column to enter the amount for each sub-bucket.

8. To create model hierarchy using the interactive user interface, click **Build segment hierarchy** related link.
   Add new segments to the hierarchy or remove segments from the cost model per your requirements.
9. To replace the top segment of the selected cost model that you want to clone:

   a. Click the **Clone Model and Replace Top Segment** related link.

   b. Select a segment from the choice list of the **Clone Model and Replace Top Segment** pop-up and click **OK**.

      You can replace the top segment in the cost model with another segment of your choice. Segments that have not been used in the cost model are available for you to choose to replace the top segment of the cost model. The replacing segment is from the available segments but has not been already used in the current cost model segment hierarchy. The selected segment replaces the existing top segment and will not be an addition to the existing segment levels in the hierarchy. Replacing the top segment enables you to configure the cost model specifically for the organizational structure of your enterprise.

      Note:
      The rules such as bucket assignments, rollups, rollup overrides, breakdown relationship, unit metrics, sibling relationship, and GL segment configured for the original segment become invalid for the replaced segment. Hence, you must set these rules for the replaced top segment.

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What to do next

The buckets that use this cost model are shown in the Buckets related list.

You can also create an account bucket.

Map a unit cost metric to a segment of a cost model to generate unit costs.

The breakdown relationship to explicitly generate breakdown cost lines in the itfm_allocation_breakdown table for a given segment-segment mapping are shown in the Breakdown Relationships related list.

You can also define a sibling relationship to roll up accounts at the sibling level.

Generating controlled cost lines

Generating controlled cost lines helps you to control the allocation lines that are required for your business needs.

If you're a new customer, by default, the allocation engine automatically generates the controlled cost lines.

If you're upgrading from a previous version to the Xanadu release, the following changes are made to the Controlled Cost Lines and GL Expense Lines options:

- When you clone a cost model, the **Generate Controlled Cost Lines** option is enabled in the new model and the **Generate GL Expense Lines** option is inactivated in the new model irrespective of whether the options were inactivated or enabled in the base model. These options aren't editable and don't appear on the default view of the Cost Model View page.
- When you create a cost model, the default values are set. The default value for the **Generate Controlled Cost Lines** option is **true** and the default value for the **Generate GL Expense Lines** option is **false**. These options aren't editable and don't appear on the default view of the Cost Model View page.
- For existing cost models, the existing values remain the same. If the **Generate Controlled Cost Lines** option is inactivated, it remains inactive. If the **Generate GL Expense Lines** option is enabled, it remains enabled. You can change the values for these options to default values.

To view the sub-bucket information and view reports on the relationship between the two segments, do the following:

- If you require the sub-bucket information of the generated lines, select the **Include sub-Bucket Info** option on the Cost Model View page.

  The generated controlled cost lines are sufficient to plot single-dimension charts with the buckets.

- Define a breakdown relationship explicitly to view reports on the relationship between the two segments.

  The engine then generates the additional breakdown allocation lines in the Cost Allocation Breakdown Aggregate [itfm_allocation_breakdown] table, which help to plot a two-dimension chart between segments. For example, IT Shared Service contribution to Business Unit.

Generate unit costs

Associate a unit cost metric with a segment of a cost model hierarchy to generate unit costs. The mapping helps to derive unit cost based on the allocation lines from the Financial Modeling application.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

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Procedure

1. Navigate to **Financial Modeling** > **Cost Models** > **All**.
2. To associate the unit cost metric to a segment or an account of a segment of the cost model, click open a cost model.
3. Click the **Unit Cost Metrics** related list.
4. Click **New**.
5. On the form, fill in the fields.

Unit Cost Metrics form

Field	Description
Cost Model	Cost model from the list.
Unit Cost Segment	The cost model segment for which the unit cost is to be generated.
Unit Cost Metric	Unit cost metric that has been defined in the consumption/weight table.
Unit	Unit of measure for the unit cost.
Transactional table	Segment transactional table, which cannot be edited.
Include Bucket Info	Option to enable the bucket information in unit costs. By default, Include Bucket Info flag is set to False. If the flag is true, then the bucket information is populated in the bucket column of the Unit Cost [itfm_unit_cost] table.
Unit Cost Accounts filter	Accounts filtered based on a criteria. Unit costs are generated only for the filtered accounts.

6. Click **Submit**.
7. Select the unit cost metric and click **Generate Unit Cost Metrics**.
8. Select the fiscal period in the Generate Unit Cost Metrics pop-up that appears.

   The engine has run the allocations already for the fiscal periods that appear in the list.
9. Click **OK**.
10. To see the unit costs, navigate to **Financial Modeling** > **Cost Model Lines** > **Unit Costs**.

    The unit costs are generated and populated in the Unit Cost table. The unit costs are generated for all the filtered accounts of the Unit Cost Segment in the Unit Cost Account column of the unit cost table.

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Enabling **Include Bucket Info** check box gives you a visibility of the amount coming from different buckets. You can track the bucket-wise unit cost in the bucket and sub-bucket columns of the unit cost table.

The table also shows the total cost and quantity. Based on the enforced relationship of the metric, you can further drill down from the account unit cost.

Define a sibling rollup relationship

Define a relationship to roll up amounts to accounts in the sibling segments. You can roll up the expenses to any account in the hierarchy, not restricting to the immediate parent or grandparent in the hierarchy.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

Procedure

1. Navigate to **Financial Modeling** > **Cost Models** > **All**.
2. Click the **Sibling Rollup Relationship** tab.
3. Click **New**.
4. On the form, fill in the fields.

Sibling Rollup Relationship form

Field	Description
Relation Name	Name that is generated for the sibling relationship that you define.
From Segment	The segment from which the relationship is created.
To Segment	The segment to which the relationship is established.

5. Click **Submit**.

Prerequisites to modify data source of a cost model

Clean the cost model of its existing data source and all the data collected and accumulated in the associated tables. Follow the steps to seamlessly change the data source.

Steps to change the data source of a cost model

1. Remove the following data from their respective tables:
   a. The allocation breakdowns for the cost model from the Cost Allocation Breakdown Aggregate [itfm_allocation_breakdown] table.
   b. The allocation for the cost model from Cost Allocation [itfm_allocation] table.
   c. The allocation aggregates for the cost model from the Cost Allocation Aggregate [itfm_allocation_aggregate] table.
   d. The groomed records for the cost model from the Groomed General Ledger Data [Itfm_gl_data_groomed] table.

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e. The cleansed records for the cost model from the General Ledger Cleansed Data [itfm_gl_data_cleansed] table.

f. The records from the Cost Allocation Runs Log [itfm_ca_run_log] table for the cost model.

2. Modify the data source of the cost model.

Choose a cost model

You can choose one cost model that you want to use in the workbench as you pass through all the stages.

Before you begin

Role required: cost_transparency_admin

Procedure

Select the cost model for the data that you want to work with from the **Cost Model** choice list in the Data Definition stage.

If you do not see the cost model you want, you can create one.

Cost model hierarchy

All the accounts belong to segments, which are structured in a cost model hierarchy.

The cost model hierarchy makes it possible for you to roll up expenses from lower-level accounts and segments to higher-level accounts and segments. For example, assume that you use the default hierarchy, which has the business service segment under the business unit segment. This rollup enables you to have the expenses that are allocated to a business service, such as email, also apply to the business units that consume the email service, one of which is commonly IT.

Note:
Using the workbench is the preferred method of modifying the hierarchy, rather than using the Segment Relationship form. When you use the workbench to modify the hierarchy, it automatically creates all the rules and methods.

Build segment hierarchy

Important:
This feature is available only when you own an ITBM Analyst license.

You can use the **Build segment hierarchy** link in the Financial Model form to create model hierarchy easily using interactive user interface as in Financial Modeling workbench. Add new segments to the hierarchy or remove segments from the cost model per your requirements.

Allocations

When the Financial Management application allocates an expense, it breaks down the expense into detailed amounts of money called allocations.

The allocations are then associated to specific segments and accounts in the Hierarchy of Segments.

To allocate expenses, the application uses the following items, which comprise your cost model:

Bucket allocations

Allocation of a particular bucket to a segment or an account in a segment using allocation methods, using the rule to calculate the breakdown of the expense, either on an equal basis, manual, or weighted.

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Segment rollups

Defines how the amount rolls up from one segment to another segment.

Rollup overrides

Amount from a particular account of a segment can roll up to any account or segment in the hierarchy.

Allocation metrics

Contain additional instructions that the application uses to allocate expenses based on a weighted calculation or on a script. A method can use one or more metrics.

When you use the workbench to assign expenses to accounts and segments, it creates all the rules, methods, and conditions automatically.

Users with the financial management administrator or financial analyst role can administer cost allocations through the workbench, which is the preferred method, or by using lists and forms.

Chargebacks

The application supports "chargebacks", or negative amounts in general ledger expenses that can be used to transfer credits between segments for a shared cost. Chargeback expenses process fixed amount methods in the opposite way of other expenses. For example, a fixed amount type method that allocates $50 on a $100 dollar chargeback, shown as "-100" in the general ledger expense, applies a $50 credit as specified by the rule.

Example Allocations

The demo data provided with the application provides good examples of different types of allocations. You can make several types of allocations, such as allocating:

- Storage costs based on consumption
- Private cloud costs based on usage of virtual machines
- Servers based on cost, CPUs, location, and so on
- Project management contract costs

Account buckets

Account buckets help you categorize cleansed expenses before you assign the expenses to accounts and segments.

Buckets can be put in parent-child relationships so that several child buckets can refer to a single parent bucket.

Buckets must also be associated with one cost model, starting with the Geneva release.

Create an account bucket

You can create account buckets in the workbench, but you can also create them with the Bucket form.

Before you begin

Role required: cost_transparency_admin

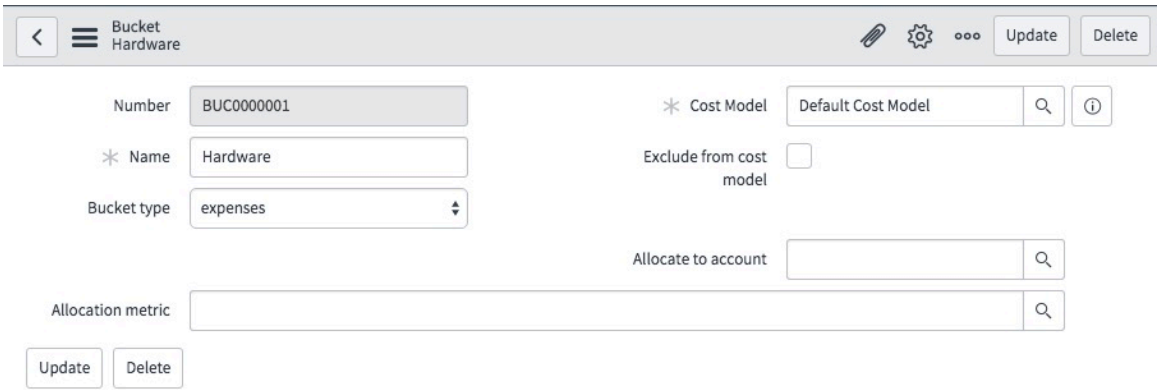
Procedure

1. Navigate to **All** > **Financial Modeling** > **Cost Models** > **Buckets**.
2. Click **New**.

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3. Fill out the fields on the form as appropriate (see table).
4. Click **Submit**.

The Bucket form



Bucket form fields

Field	Description
Number	Auto-generated identification number for the bucket.
Name	Descriptive name for the bucket.
Bucket type	The type of bucket: ○ Selector: a split bucket ○ Expenses: standard buckets (non-split)
Cost Model	The cost model associated with this bucket. Select the cost model. If you open the cost model record, the buckets associated with it appear in the Buckets related list. These are the buckets that are available to that cost model on the Workbench when you put expenses into buckets.
Exclude from cost model	If the bucket is not used for allocations.
Parent bucket	Parent bucket that this bucket is associated with.

When you put expenses into buckets, you can also add new buckets and create conditions for buckets that filter the data that goes into the bucket.

Grooming and cleansing conditions

Grooming conditions define how expenses are related to each other and to buckets when you make changes in the workbench, while cleansing conditions define how financial data is cleansed by segment.

Grooming conditions

The workbench creates three types of grooming conditions:

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- Data cleansing conditions: Defines the expense combinations that you make during the Cleansing stage. For example, if you drag the expense entry for the Acme vendor onto the Acme Inc. vendor, the application creates a grooming rule that specifies to the workbench that all those expenses should be considered as belonging to the Acme Inc. vendor. The application does not actually add, delete, or modify the expense records in the General Ledger Cleansed Data table [itfm_gl_data_cleansed].
- Bucketing conditions: Defines which expenses you added to buckets during the Bucketing stage.
- Advanced query conditions: Defines which expenses are allowed to be added to buckets during the Bucketing stage. The application creates data cleansing and bucketing conditions automatically when you use the workbench. The only type of grooming condition that you create manually, either through the form view or through the workbench, is the advanced query condition.

Cleansing conditions

The application creates cleansing conditions when you merge expenses in the cleansing stage of the workbench. You do not need to modify these cleansing conditions.

Modify advanced query conditions

You can modify existing advanced query conditions, which define how expenses are added to buckets.

Before you begin
Role required: cost_transparency_admin

About this task

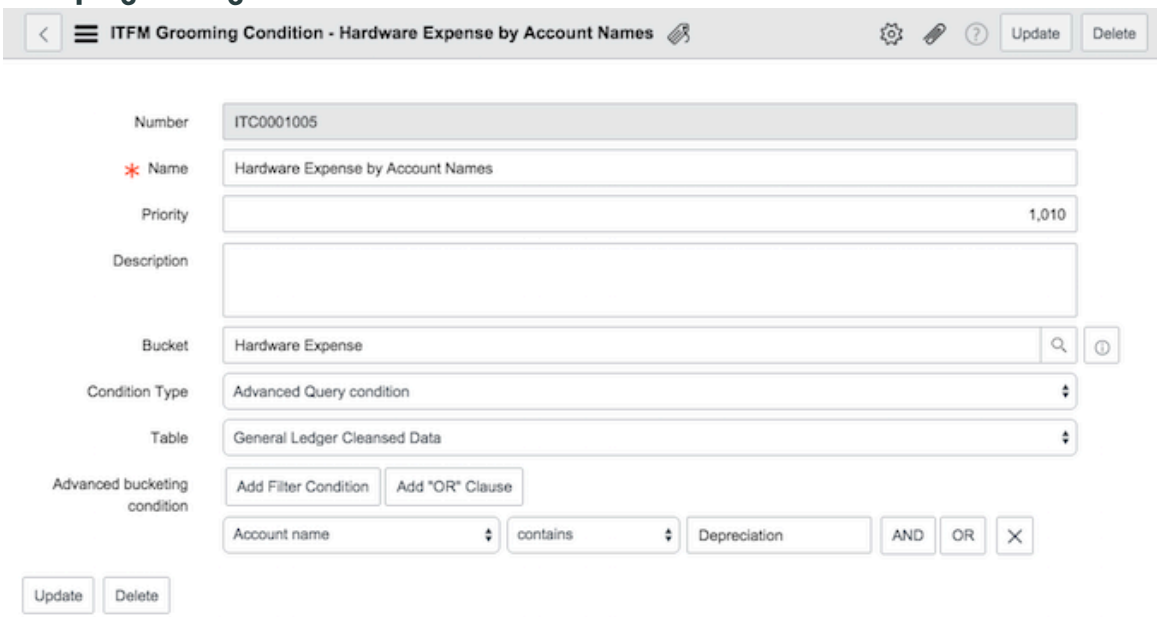
Note:
Grooming conditions are automatically created in the workbench.

Procedure

1. Navigate to **All** > **Financial Modeling** > **Cost Models** > **Grooming Conditions**.
   The resulting list of records is filtered to show only advanced query conditions.
2. Click the grooming condition number to open it.
3. Modify the fields on the form as appropriate (see table).
4. Click **Update**.

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Example grooming condition



Example grooming conditions

Field	Description
Number	Auto-generated identification number for the bucket.
Name	Descriptive name for the bucket.
Priority	A code for the bucket that the system uses to identify it. Enter any alphanumerical code. Bucket codes cannot have duplicates.
Description	If the bucket is not used for allocations.
Bucket	The buckets that use this bucket as a parent. To create a sub-bucket, click **New** and fill out the fields on the form. The fields are the same as on the Bucket form, except that the **Parent bucket** field is visible.
Condition Type	The type of grooming condition. Select **Advanced Query condition**.
Table	The table containing the expenses that are filtered when put into the bucket. By default, the General Ledger Cleansed Data [itfm_gl_data_cleansed] table is selected. Do not change the table.
Advanced bucketing condition	The condition that determines the financial data that must meet the advanced query condition. Use the condition builder to create the filter.

Expense allocation

Expense allocation refers to the assignment of expenses to accounts in the hierarchy of segments.

You can allocate expenses by applying rules to groomed expenses in the general ledger. The methods and metrics in the rules specify how the expenses are allocated. See Allocations for more information on how rules, methods, and metrics work.

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Reversions and Reallocations

After a groomed expense in the general ledger is allocated, it cannot be allocated again unless the original allocation is reverted. You should revert allocations if changes to allocation rules, methods, or metrics are made and the general ledger expenses must be reallocated according to the modifications. In addition, if you make changes to the hierarchy of segments, all expenses need to be reverted first.

View allocation lines

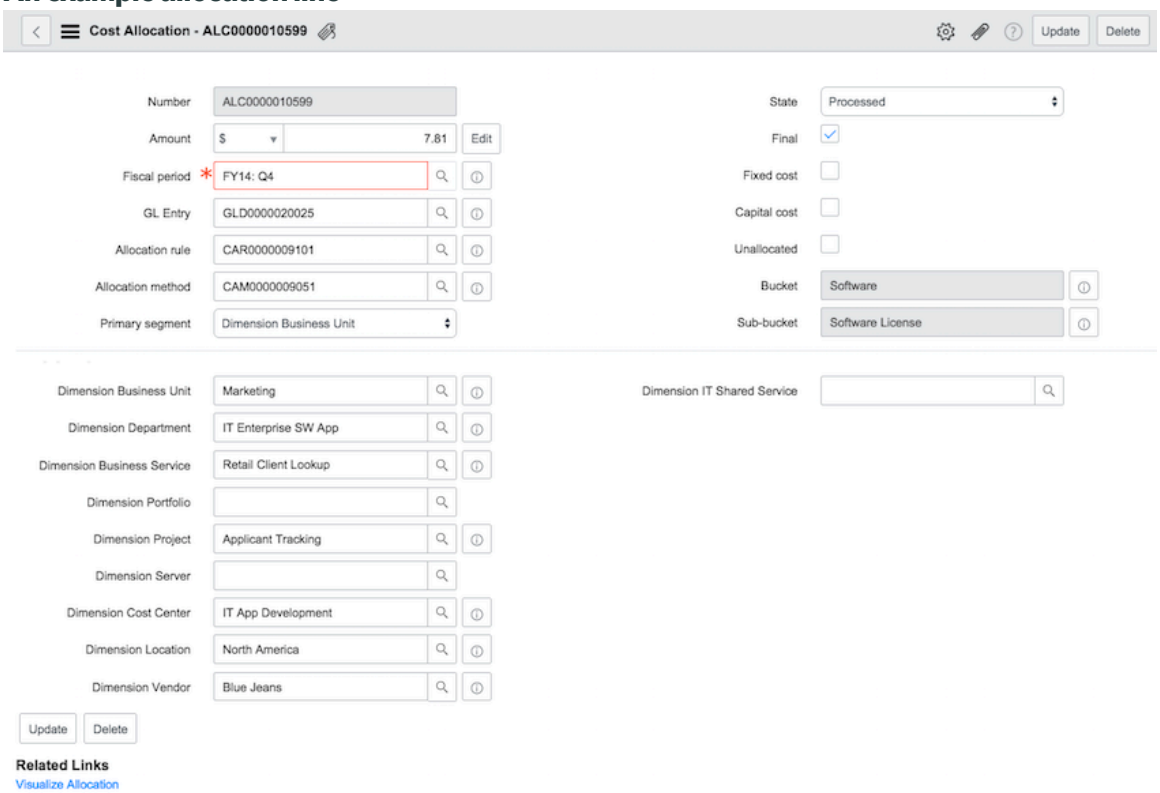
After you complete an allocation, you can view the allocation lines that the application created.

Before you begin
Role required: cost_transparency_admin

Procedure

1. Open the allocation line that you want to modify through either of the following methods:
   - To access an allocation through the general ledger that created it:
   a. Navigate to **Financial Modeling** > **General Ledger** > **Groomed Expenses**.
   b. Open the expense that generated the allocation you are looking for.
   c. In the **Cost Allocations** related list, click the allocation number.
   - To access an allocation from a list of all allocations:
   a. Navigate to **Financials** > **Cost Models** > **Allocation Lines**.
   b. Click the allocation number.
2. Verify or change any of the editable fields on the form (see table).
3. Click **Update**.

An example allocation line



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Cost Allocation form fields

Field	Description
Amount	The amount of this allocation.
Fiscal period	The fiscal period fiscal period this expense belongs in.
GL Entry	The groomed expense from which this allocation line was derived.
Final	If the allocation line was processed by a rule that is marked final or if no subsequent rule can process this allocation. Reports are run on final allocation lines.
Bucket	The bucket that the allocation belongs to. This bucket is taken from the expense during allocation.
Sub-bucket	The sub-bucket that the allocation belongs to. The sub-bucket is also taken from the expense during allocation.
[Dimensions]	The segments in the hierarchy of segments. The segments fields that contain values are the segments that you specified in the allocation methods that processed the allocation. If more than one method processes an allocation, all the allocated segments specified in all the methods contain a value. To make a change, click the lookup icon next for each dimension and select the relevant record.

Financial Management example allocations

The demo data that is available with the Financial Management application provides examples of cost allocations that you can use to model allocation rules, methods, and metrics.

Allocate by number of servers

This weighted allocation metric allocates to servers based on the server cost.

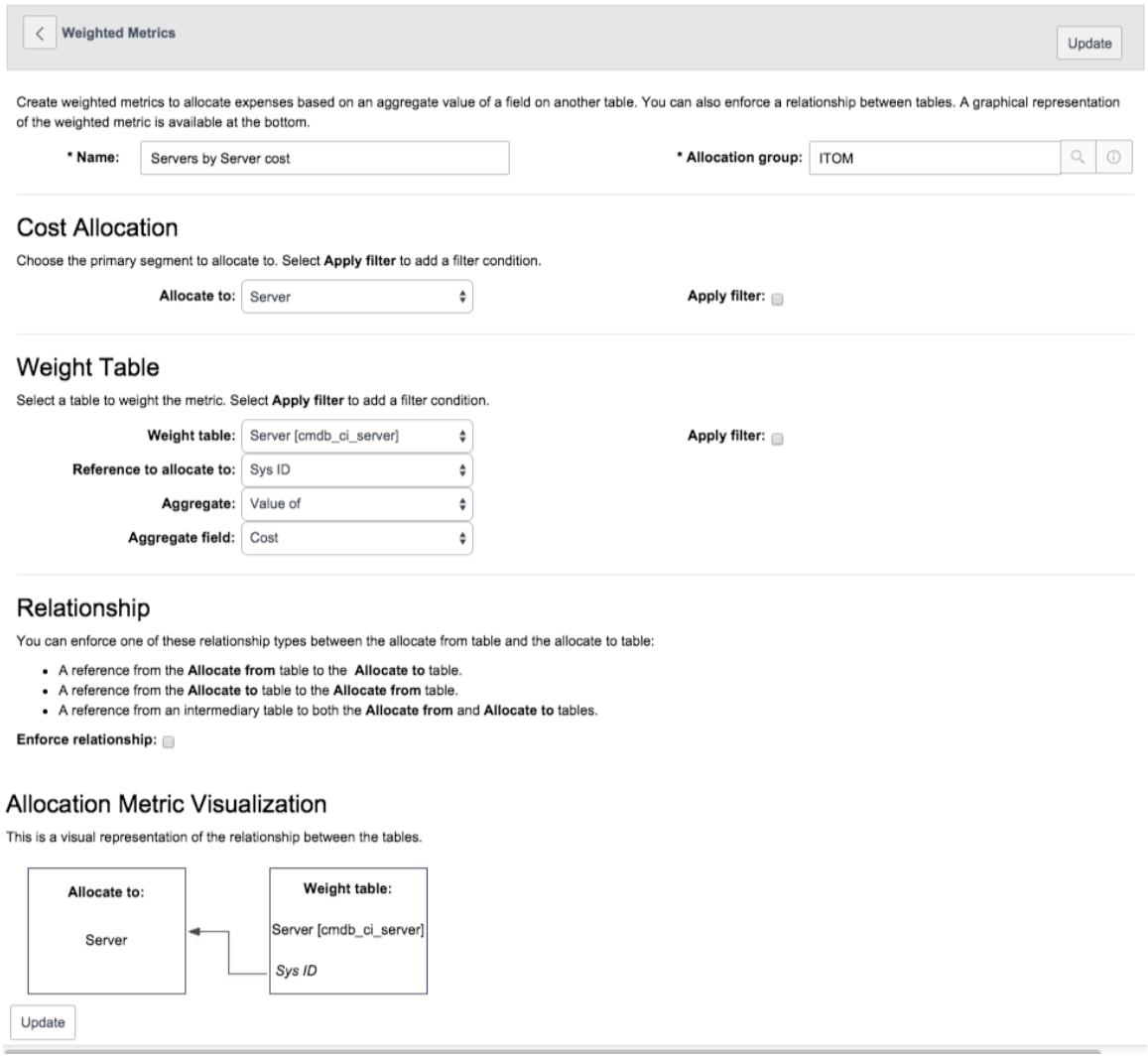
- **Metric name**: Servers by Server cost
- **Type**: weighted

Notice the following field values:

- **Weight table** is the Server table in the CMDB.
- **Reference to allocate to** is the field on the weight table that you are allocating to. In this case, you are allocating to individual servers that are identified by their sys_id.
- **Aggregate** takes the value of the **Aggregate count** field in the weight table, which in this case is **Cost**.
- **Aggregate count** is the cost of each server, which is identified on the server record.

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A metric that weights allocations by server cost



Metric weight maps

Weight maps are generated for each metric for every fiscal unit set in com.glide.fiscal_calendar.fiscal_unit property.

Weight map is JSON that holds the weighted breakups to allocate accounts for a metric. Allocation or rollup based on weighted metrics works only if correct weight map is generated for a given fiscal period.

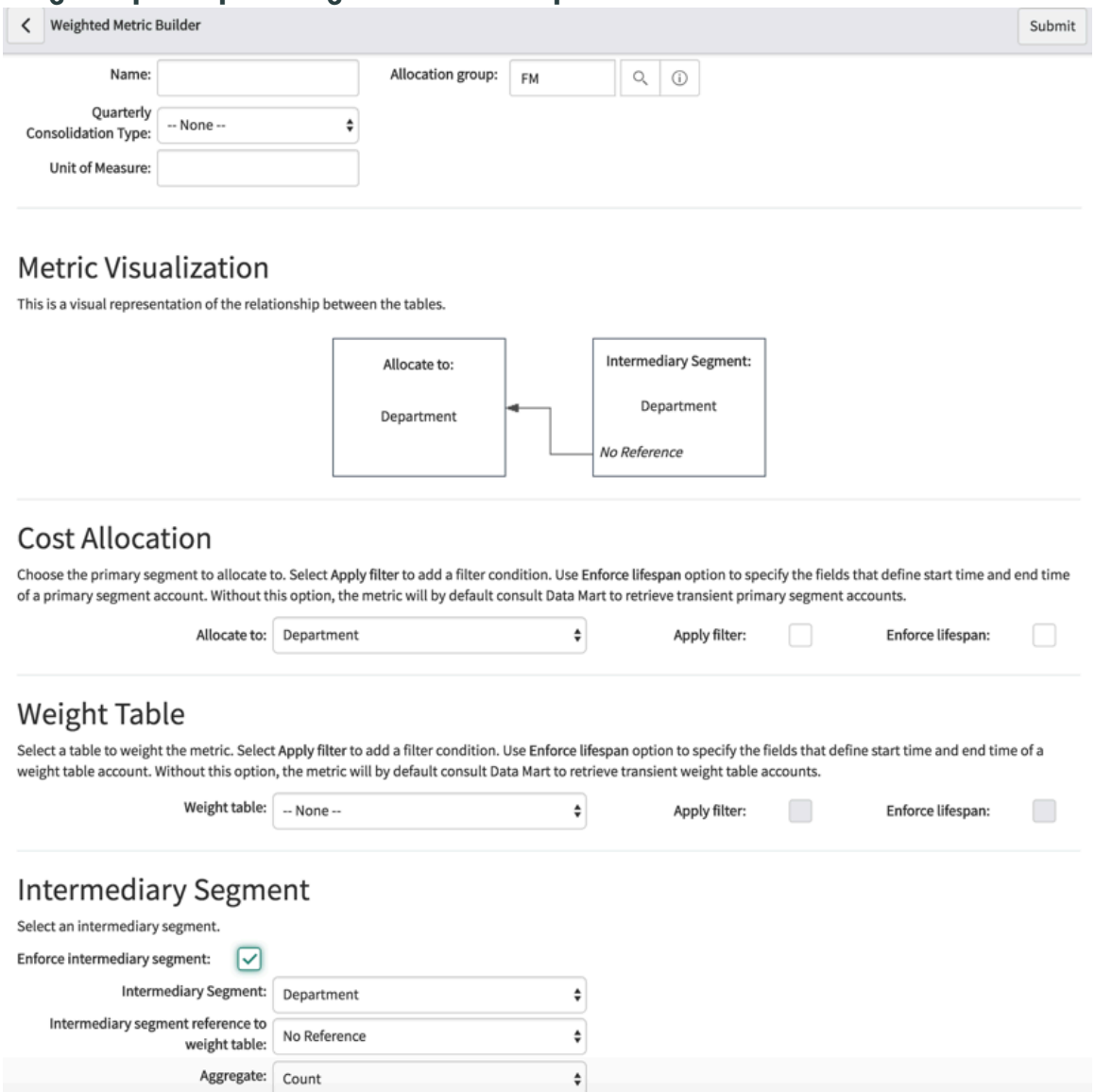
The **Preview Weight Map** (also available from the application navigator) in the Weighted Metric Builder form shows how the weight is split across the accounts for a given fiscal period. The Weight Map Preview list view shows the total number of weights and the date and time the weight map was last generated. You can also view the percentage split for each account breakdown and generate or regenerate the weight map in the Preview Weight Maps user interface if the current weight map is not correct or has not generated.

Pre-generated weight maps for the fiscal period also helps in the performance of allocation workbench to avoid generating weight maps spontaneously while allocation page is still in the process of loading.

Following is an example to understand weight maps and percentage allocation if metric is used:

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Weight maps and percentage allocation example



Use cost analysis to view the allocation of amount

Use cost analysis for a specific cost model for a fiscal period to view the cost lines using a UI similar to allocation workbench. Cost analysis helps you to view the bucket amount, the amount allocated to accounts, and the rolled up amount across segments and accounts based on the cost lines generated by the allocation engine.

Before you begin

Role required: cost_transparency_admin or cost_transparency_analyst

About this task

You can view allocations made for the previous fiscal periods without any interference of allocation or rollup rules defined for the current cost model because cost analysis is based purely on cost allocation lines.

Cost analysis is an effective showback reporting tool that you can use to view the allocated costs. After running the allocation engine, analysts can use cost analysis to validate if the allocation rules have allocated the expected amount.

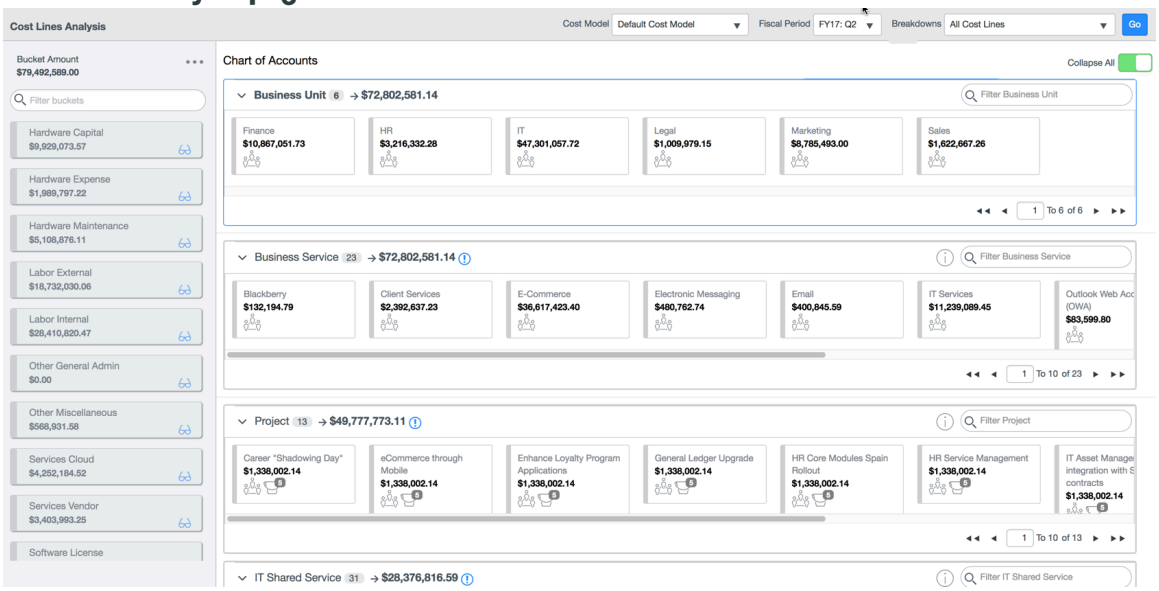
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Procedure

Navigate to **Financial Modeling** > **Workbench**.

You can also navigate to **Financial Modeling** > **Cost Analysis**.

Cost lines analysis page



The Cost Lines Analysis page has the following key features:

- The buckets, accounts, and their amount based on the generated cost lines.
- The consolidated buckets amount allocated to accounts.
- The segment level consolidated amount for all accounts in that segment.
- The bucket icon ( ) and relationship icon ( ) function in the same way as the Workbench page, but are based on generated cost lines.
- Allocation viewer ( ) for accounts and buckets shows how the amount has been rolled up.
- Configure to display 5, 10, 15, 25, or 50 accounts in a page out of the total accounts per segment. The pagination option that you set in the Configuration tab displays the selected number of accounts of a segment in the Cost Lines Analysis page. The right and left arrows enable you to navigate to the next set of records until all the accounts in the segment are displayed.

Allocation metrics

Allocation metrics contain additional instructions that the application uses to allocate expenses based on a weighted calculation or on a script. Allocation methods use metrics to perform the allocation.

Following are the types of metrics that are available:

- **Weighted metrics** are calculations based on an aggregate value from a segment. Use weighted metrics to influence how much of an expense is allocated to a segment based on other records in the instance, such as the number of servers used by a segment or the value of depreciation on an asset. Users with the Finance Administrator role can create weighted metrics.
- **Scripted weighted metrics** are weighted metrics in script form.

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- Scripted methods are calculations based on customizable scripts that use the allocation method API. These metrics were formerly called as scripted metrics.
- **System metrics** are metrics that the application creates automatically when you use the workbench. These metrics are read-only and accessible by users with the Finance Administrator role. See the Using the Workbench topics for more information.

Note:
When you use the workbench to assign expenses to accounts and segments, it creates all the rules, methods, conditions, and so on automatically. Using the workbench is the preferred method of setting up allocations, rather than using lists and forms.

Starting with the Geneva release, fiscal periods are supported in metrics.

View, modify, and validate fiscal periods

After you generate a fiscal calendar, you can view fiscal period records, modify the start and end date, deactivate a fiscal period if necessary, and validate.

Before you begin
Role required: fiscal_calendar_user

Procedure

1. Navigate to **All** > **System Definition** > **Fiscal Periods**.
2. Open any of the fiscal periods (see table for field descriptions) to view, modify, or deactivate.

Fiscal period form

Field	Description
Name	Name of the fiscal period.
Start date time	Date the fiscal period starts.
End date time	Date the fiscal period ends.
Fiscal Type	[Read-Only] Type of period, either **Year** or **Quarter**.

3. Validate the fiscal periods to ensure that there are no gaps and that they match a valid style of calendar.
   a. To validate, return to the list view of fiscal periods and click **Validate Periods**.

Create weighted allocation metrics

You can create weighted metrics using an enhanced form or a standard form.

Before you begin
Role required: cost_transparency_admin

About this task
The enhanced form provides a visualization that helps you understand the relationships between the various components of the metric. Use the enhanced form that opens by default.

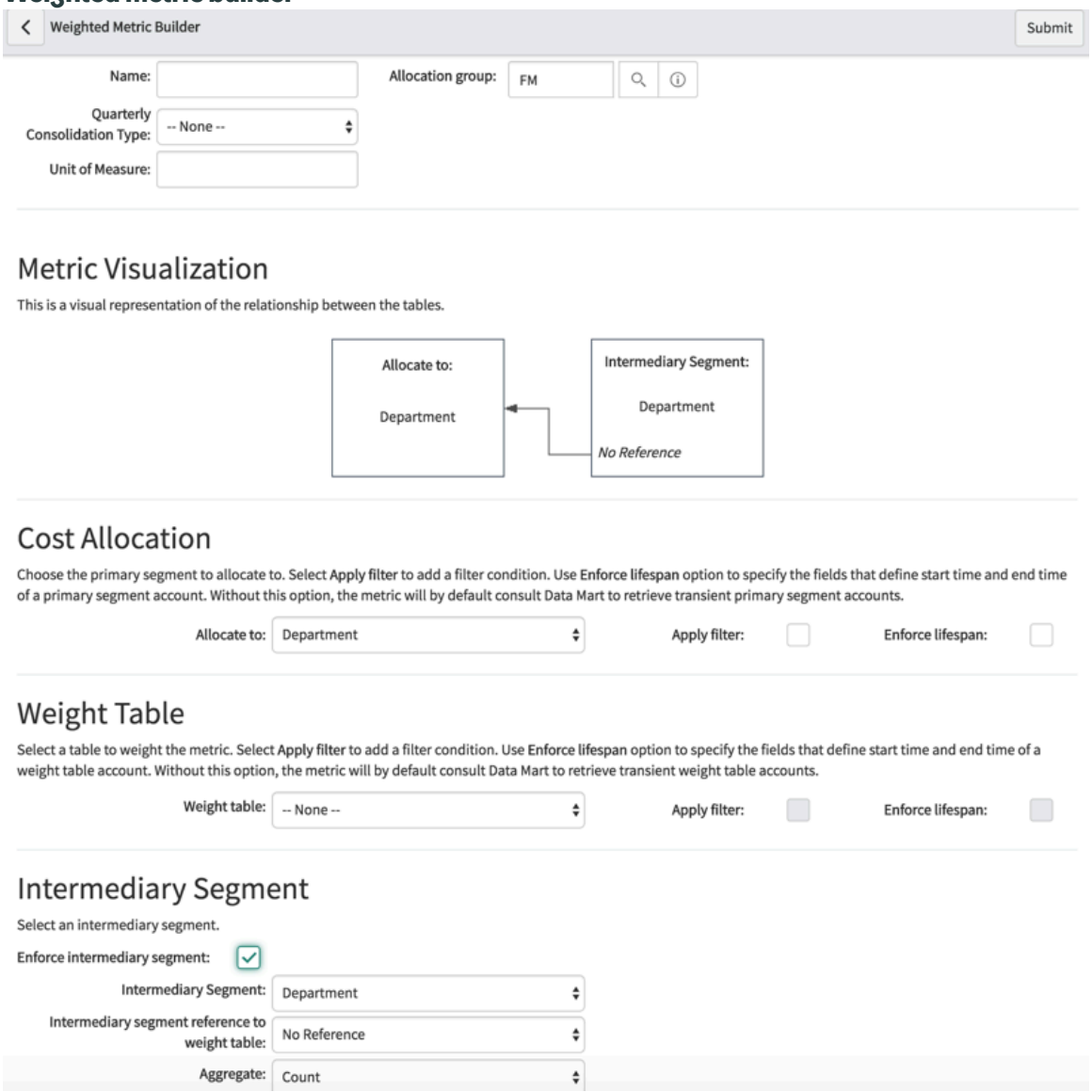
Procedure

1. Navigate to **All** > **Financial Modeling** > **Consumption Metrics** > **Create Weighted Metric**.
2. On the form, fill in the fields.

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A graphical representation of the weighted allocation appears in the **Metric Visualization** section. When you make changes to the form the graphic updates dynamically.

Weighted metric builder



Weighted Metric form

Field	Description
Name	Descriptive name of the metric.
Allocation group	Group associated with this metric. The default group is ITSM.
System metric	Metric created by the application in the workbench.
Refresh frequency	Frequency at which the data is refreshed.

Cost Allocation section of the Weighted Metric form

Field	Description
Allocate to	Segment in the hierarchy to which allocations are processed.

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Field	Description
	You can access fields in related tables and the reference to the chain of field names separated by dots can go on up to any number.
Apply filter (Cost Allocation)	Check box to display the condition builder. Specify the criteria that the selected **Allocate to**segment field must be met for this metric to apply. The fields available for the first part of the condition depend on the table you select for **Allocate to**. The condition builder supports dot walking, so you can select fields on another table.

Weight Table section of the Weighted Metric form

Field	Description
Weight table	The table used to weight the allocation amounts based on aggregations.
Reference to allocate from	The field on the weight table that refers to the **Allocate from** segment. This field is available when the **Enforce relationship** check box is selected. You can access fields in related tables and the reference to the chain of field names separated by dots can go on up to any number.
Reference to allocate to	The field on the weight table that refers to the **Allocate to** segment. You can access fields in related tables and the reference to the chain of field names separated by dots can go on up to any number.
Aggregate	The type of aggregation to perform on the records in the weight table. Select from the following options: ○ **Count**: A count of the number of records in the weight table that meet the weight condition. ○ **Value of**: The value of the selected field. ○ **Sum**: The sum of the values in the table for the selected field. ○ **Average**: The average of the values in the table for the selected field.

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Field	Description
	○ **Min**: The minimum value in the table for the selected field. ○ **Max**: The maximum value in the table for the selected field.
Aggregate field	The field on the weight table that is used for the aggregate calculation. This field is available when any aggregate other than **Count** is selected.
Apply filter (Weight Table)	Check box to display the condition builder. If the condition must be met before the application can allocate expenses using the weight table.

Intermediary Segment section of the Weighted Metric form

Field	Description
Enforce intermediary segment	Option to enforce intermediary segment.
Intermediary Segment	Segment that is identified as intermediary segment, which is not included in cost model hierarchy.
Intermediary segment reference to weight table	Relationship of the intermediary segment with the**Allocate to** segment, defined and referenced in the weight table.
Aggregate	Type of aggregation performed on the records in the weight table.

Relationship section of the Weighted Metric form

Field	Description
Enforce relationship	Limits the segments that this metric allocates to based on an existing relation to another segment.
Allocate from	The table from which allocations are processed. This field is available when the **Enforce relationship** check box is selected. You can access fields in related tables and the reference to the chain of field names separated by dots can go on up to any number.
Relation type	The type of relationship between the **Allocate from** table and the **Allocate to** table.

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Field	Description
	○ **Allocate from**: A reference from the **Allocate from** table to the **Allocate to** table. ○ **Allocate to**: A reference from the **Allocate to** table to the **Allocate from** table. ○ **Intermediary**: A reference from an intermediary table to both the **Allocate from** and **Allocate to** tables.
Relationship field from	The field on the **Allocate from** table to allocate from. This field is available when the **Enforce relationship** check box and the **Allocate from** relationship type are selected.
Relationship field to	The field on the **Allocate to** table to allocate from. This field is available when the **Enforce relationship** check box and the **Allocate to** relationship type are selected.
Apply filter (Relationship)	Condition must be met before the application can do one of the following actions: ○ Allocate expenses using the **Allocate from** table if you select the **Allocate from** relationship type ○ Allocate expenses using the **Intermediary** table if you select the **Intermediary** relationship type Then select this check box to display the condition builder.
Intermediary table	Table that is used between the **Allocate from** and **Allocate to** tables to connect them. This field is available when the **Enforce relationship** check box and the **Intermediary** relationship type are selected.
Intermediary table field from	The field on the intermediate table that maps to the **Allocate from** table. This field is available when the **Enforce relationship** check box and the **Intermediary** relationship type are selected. You can access fields in related tables and the reference to the chain of field names separated by dots can go on up to any number.
Intermediary table field to	Field on the intermediate table that maps to the **Allocate to** table. This field is available when the **Enforce relationship** check box and the **Intermediary** relationship type are selected. You can access fields in related tables and the reference to the chain of field names

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Field	Description
	separated by dots can go on up to any number.
Allocate from table condition filter	Criteria that the records in the **Allocate from** table must meet for this metric to apply. These fields are available when the **Enforce relationship** check box, the **Allocate from** relationship type, and **Apply filter** check box are selected.
Intermediate table condition filter	The criteria that the records in the intermediate table must meet for this metric to apply. This field is available when the **Enforce relationship** check box, the **Intermediary** relationship type, and **Apply filter** check box are selected.
Preview weight map	Weight Map is generated for the selected metric and the fiscal period. The preview lists the weight map review with total number of weights and the last generated date and time.
Fiscal period choice list	The fiscal period from the fiscal calendar.
Segment choice list	The account in the rollup segment.

Total Weight Table section of the Weighted Metric form

Field	Description
Enforce allocation from total weight	Check box to enable enforce allocation from total weight.
Total weight table	Table from which the actual consumption values are retrieved.

Related Links section of the Weighted Metric form

Field	Description
View standard form	Switches between the advanced form and the standard form.

Related Lists section of the Weighted Metric form

Field	Description
Cost Allocation Methods	The allocation methods that this rule uses to break down expenses.
Cost Allocations	The allocation lines that this rule created.

Note:
You cannot delete a rule that is referenced by a locked allocation line.

Enforce allocation from total weight is an allocation metric based on capacity. As an IT financial analyst, you can also allocate cost where the total capacity of a service is greater than the sum of what is consumed. To enable this option, you must select the **Enforce allocation**

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from total weight check box in the **Total weight table** section. Select a total weight table to calculate the total weight of metric based on the total consumption capacity. The weighted metric allocates cost based on the total number of available units of consumption.

Note:
You can either enforce allocation relationship or enforce allocation from total weight. Enforce total weight if the total allocation is greater than the sum of the consumed values. Whereas, enforce allocation relationship works when the sum of all consumption values (of all individual entities) in the weight table adds up to a total capacity of 100%. For more information, see Total weight support for allocations using weighted metric.

Intermediary Segment option: Use this option when you have a segment with large number of accounts that add to numerous allocation lines. Nevertheless, the intermediary segment is still considered for the amount to rollup through it for proper allocation. However, the segment identified as intermediary is not included in the hierarchy of cost model and its allocation lines are not generated.

The option to identify a segment as an intermediary segment is just to exclude the segment in the generation of multiple cost lines. However, you should create a metric based on the relationship between the intermediary segment and the **Allocate to** segment to include the segment for accurate amount rollup. Based on the relationship the allocation engine creates the weight, and based on the weight the allocation lines are generated for the intermediary segment.

You must create a cost allocation metric to process the weight of the intermediary segment that is referenced in the weight table. Two sets of weight maps are generated, one for the intermediary segment and another for the Allocate to segment.

3. Click **Submit**.

What to do next
To preview the weight map that you created, click the **Preview Weight Map** button.

Preview weight map

You can preview a weight map to give you visibility of the generated metric weight map because it displays the accounts for the selected metric and the selected fiscal period with the percentage split for each account.

Before you begin
Role required: cost_transparency_admin or cost_transparency_analyst

About this task
The Allocation workbench displays the expense summary for all months, quarters, or periods when you run the allocation and the window becomes cluttered with data for all quarters. To overcome the UI page clutter, you can preview the weight map in its own page.

Procedure
1. Navigate to **All** > **Financial Modeling** > **Consumption Metrics** > **Preview Weight Maps**.
   a. Alternatively, you can navigate to **Financial Modeling** > **Consumption Metrics** > **All Metrics**.
   b. Click a cost allocation metric to open the Weighted Metric Builder.
   c. Click **Preview Weight Map** .
2. Select a metric from the **Metric** list in the left pane.
3. Select a fiscal periodfrom the **Fiscal Period** list.
4. Click **Generate**.

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The right pane displays the generated date and time details, the accounts, their respective weights, the total weight, and the percentage split. You can regenerate the weight map to preview each month or a quarter of a fiscal period.

5. Click **Generate** or **Generate All** based on the metric that you have selected:

   - Click **Generate** to roll up an account of a segment to a segment above in the hierarchy. Based on the metric that you have selected the amount is divided between the accounts of that rolled up segment.

   - The **Generate All** button is enabled if you select a metric that defines rolling up of all the accounts individually in a segment using the **Enforce Relationships** option in the metric definition to one or more accounts of a segment above in the hierarchy.

Create scripted allocation metrics

You can create scripted metrics and methods using the standard Cost Allocation Metric form.

Before you begin

Role required: cost_transparency_admin

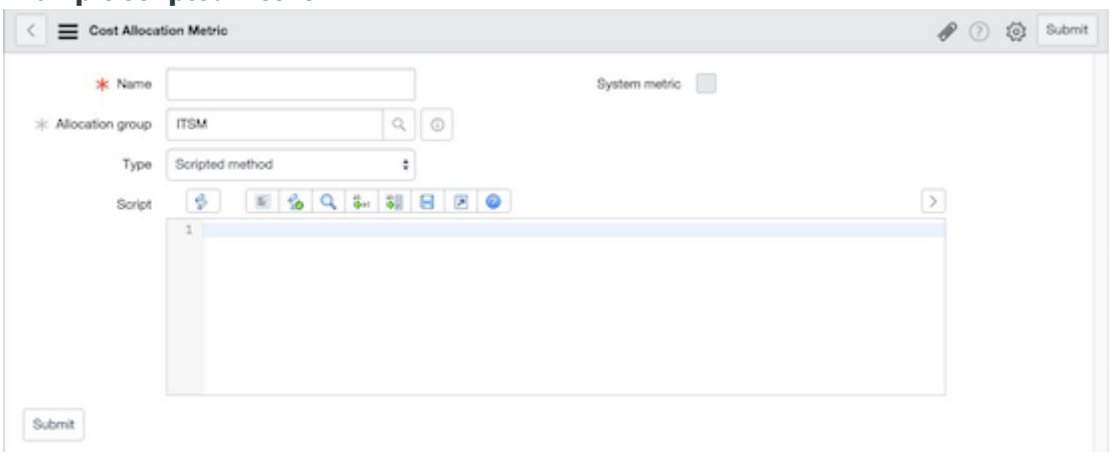
About this task

You can create weighted metrics in scripted form and scripted methods Allocation metrics for more information.

Procedure

1. Navigate to **All** > **Financial Modeling** > **Consumption Metrics** > **Create Scripted Weighted Metric**.
2. Click **New**.
3. Select **Scripted weighted metric** or **Scripted method** in the **Type** field.
4. Fill out the fields on the form as appropriate (see table).
5. Click **Submit**.

Example scripted metric



Scripted metric form fields

Field	Description
Name	Descriptive name of the metric.

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Field	Description
Allocation group	The group associated with this metric. On the Cost Allocation Method form, the selection of the group limits the selection of the metric to only those metrics that use the group.
System metric	If this metric was created by the application in the workbench.
Type	The type of script. Select **Scripted method** or **Scripted weighted metric** to make the **Script** field appear.
Script	The script to calculate the allocation.

Related List section of the Scripted metric form

Field	Description
Cost Allocation Methods	Methods that use the metric. You can add methods to the related list or navigate to the method form and select the metric you just created.

Note:
You cannot delete a rule that is referenced by a locked allocation line.

Financial Charging

Financial charging is an integral part of financial management that helps in reporting the financial aspects of a business service to various stakeholders in the organization that consume the service such as the business unit heads, department heads, or account heads.

Note:
This feature is available only when you own an ITBM Analyst license.

Watch this four-minute video to learn more about Financial Charging in ServiceNow. This video covers financial charging, the users involved in the financial charging process, showback statements, and financial modeling.

A business service is a set of interconnected applications and hosts configured to offer service either within or to an organization. Track the consumed business services and products offered within your organization and show the cost of the services as showback statements. The showback statement reports the services consumed in terms of their cost, for reporting to the business unit heads.

The showback statements provide consumption visibility and improve automation of the services offered. These statements also help the service owners handling the services to view the consumption data and formulate budgeting.

Showback statement reports the services consumed through the statement items that are records of the service consumption details and the cost of the service. These record details are stated as the statement items and are retrieved from various sources such as:

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- **Consumption table**: The cost and the consumption volumes can be from any platform table that contains the consumption data.
- **Cost model**: The source of the cost data is the cost allocation lines from the Financial Modeling application.
- **Service catalog**: The cost and consumption volumes can be based on fulfilled catalog requests for a particular service catalog category or catalog items.

What to do next

Assign roles to your users. Set up the Financial Charging application to use the showback feature.

Financial charging application setup

There are several components of the Financial Charging application that you must set up before you can use the showback feature for a business service.

Important:

This feature is available only when you own an ITBM Analyst license.

What to do next

As a first step you must define a service. Based on the service that you offer and the utilization of the service, the showback statement is generated for a fiscal period, as a report, for the business unit that utilized the service.

To measure the business services utilized and the resources used in terms of cost, the showback statement uses statement items. Statement items capture the source from where the cost details must be retrieved. Determine the type of the statement item, which in turn determines the source from where the cost data is retrieved.

Determine the statement item type

Determine the type of statement item as a first step to create a statement item. Or, you must determine the source from where the consumption or usage details and the cost of consumption data is retrieved.

Before you begin

Role required: service_charging_analyst

Important:

This feature is available only when you own an ITBM Analyst license.

About this task

Consumption Statement Item

The cost of the consumption statement item is generated every fiscal period from any platform table that contains the consumption data. Cost information could also come from the same table or can be applied from a rate card.

Cost Model Statement Item

The cost model statement item retrieves the allocated unit cost data from the Financial Modeling application.

Service Catalog Statement Item

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You can derive the cost, consumption volumes, and consumption details of an item from the Requested Item (sc_req_item) table in service catalog.

Procedure

1. Navigate to **All** > **Financial Charging** > **Administration** > **Statement Items**.
2. To create a statement item, click **New**, or click the name of an existing statement item that you want to edit in the Statement Items list.
3. Select the type of statement item you want to create.

What to do next

Define a statement item depending on the source where your consumption data is available.

What type of Statement Item form

Field	Description
Consumption Statement Item	Link to create a consumption statement item.
Cost Model Statement Item	Link to create a cost model statement item.
Service Catalog Statement Item	Link to create a service catalog statement item.

Define a consumption statement item

If your cost and business service usage details are sourced from an external consumption table, then you can source the consumption details of the consumption table for the statement item.

Before you begin

Role required: service_charging_analyst

Important:

This feature is available only when you own an ITBM Analyst license.

About this task

Business service consumption details can come from a table belonging to one or other platform applications or from an external consumption table, in which case the consumption details can be loaded on to the platform table. The consumption table gives you the daily or monthly consumption details of a business service. Based on the usage, the cost of the service is computed using the unit cost and quantity consumed for a fiscal period.

For example, the monthly utility bill for household power consumption has details of the appliances that you run and the power consumed in Watts, calculated monthly and annually. Based on the unit price and the consumption quantity, the bill amount is generated.

Procedure

1. Navigate to **All** > **Financial Charging** > **Administration** > **Statement Items**.
2. In the Statement Items list, click **New**.
3. In the What type of Statement Item? query form, click the **Consumption Statement Item** link.
4. On the form, fill in the fields.

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Consumption Statement Item form

Field	Description
Name	Name of the consumption statement item.
Consumption table	Source table that has the consumption data, which is configured as the statement item.
Consumption item	The item for which the consumption data is held in the consumption table.
Consumed date	The column in the consumption table that has the consumed date details.
Active	Check box to make the statement item active.
Business Service	Business service that uses the statement item as a configured item. You can also define a service .
Fiscal unit	Fiscal unit should be a month, quarter, or a period based on the fiscal calendar for which the consumption data is generated.
Aggregate	Consumption table is queried based on the aggregate function you select.
Description	Short description of the statement item.
Consumption table filter	Filter to display the items that meet your conditions.

Amount section of the Consumption Statement Item form

Field	Description
Price basis	Select the criterion to determine the price. ○ Amount retrieves the data from the selected **Amount** field of the consumption table. ○ Ratecard class is based on the pricing policy that is set for the statement item. ○ Unit price is the cost per unit of the item.
Amount field	Amount data is taken from the selected field if the **Price basis** is amount.
Ratecard class	Rate card class.
Consumption table ratecard mapping field	Amount is derived based on the consumption table ratecard mapped field and the rate card item mapping field, if you select **Ratecard class** in the **Price basis** field.
Rate Card Item mapping field	Amount is derived based on the rate card item mapping field and consumption table ratecard mapping field, if you select **Ratecard class** in the **Price basis** field.

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Service Charging section of the Consumption Statement Item form

Field	Description
Service owner	User who owns the business service and views the consumption statement items. As a service owner, you can manage the showback items. You can view the unit cost, cost recovery based on consumption, and set unit price, discount, or surcharge to the showback item.
Pricing policy	Set the pricing policy for the statement item at the statement item level, statement item breakdown level, or at the item level. If you set the pricing policy at the statement item level, the price adjustment that you do as a service owner reflects the adjusted price at the statement item level. Similarly, for the statement item breakdown and the item levels, the price adjustment is reflected at the respective levels.
Pricing policy method	Set the price adjustment based on a percentage of the average unit cost of the catalog item. Or, override the average unit cost by setting a price per unit for the item. **Note:** If the pricing policy is at the item level, then you can opt for the percentage-based pricing policy method.

5. Click **Submit**.
6. To generate the charge lines for the consumption statement item, click **Generate Charge Lines** t.
   a. To generate the charge lines, enter the fiscal period in the Generate charge lines dialog box.
   b. Click **OK**.
7. To save the updated record, click **Update**.
8. To delete a record, click **Delete**.

What to do next

To create breakdown records for the consumption statement item, click **New** in the Consumption Breakdowns related list.

Create consumption breakdowns

Create consumption breakdown records to make your showback report more detailed by reporting the expense line accounts that comprise the consumption statement item.

Before you begin

Role required: service_charging_analyst

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Important:

This feature is available only when you own an ITBM Analyst license.

About this task

For example, a storage service invoice can provide the consumption details of individual items such as Tier I, Tier II, and Tier III storage. Each of these items provides the associated cost calculated that is based on the unit cost of each item.

Procedure

1. Click **New** in the Consumption Breakdowns related list to create breakdown records for the consumption statement item.
2. Fill in the form fields.

Consumption Breakdown form

Field	Description
Name	Name of the consumption breakdown.
Table	Defaults to the table from where the data is retrieved.
Condition	Filters data that fulfill the condition from the table.

3. Click **Submit** to save the record.

Define a cost model statement item

The cost of the item or service is derived from the allocation lines of financial modeling application. The statement item captures the cost from the segment accounts, specific accounts in a segment, or buckets in an account, which gives you the cost of the statement item for a fiscal period.

Before you begin

Role required: service_charging_analyst

Important:

This feature is available only when you own an ITBM Analyst license.

Procedure

1. Navigate to **All** > **Financial Charging** > **Administration** > **Statement Items**.
2. Click **New** in the Statement Items list.
3. Click **Cost Model Statement Item** link in the What type of Statement Item? query form.
4. Fill in the form fields.

Cost Model Statement Item form

Field	Description
Name	Name of the cost model statement item.

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Field	Description
Cost model	The cost model used in the Financial Modeling application from which the cost data are retrieved for the statement item.
Unit cost metric	Calculates unit cost based on the weighted metric.
Segment	Segment for which cost is to be reported.
Active	Enable the check box to make the cost model statement item active.
Business service	Business service that uses the statement item as a configured item. You can also define a service.
Fiscal unit	Defines the fiscal unit to be a month, quarter, or a period. Defaults based on the selected cost model.
Transactional table	Name of the transactional table that the segment refers to. Defaults based on the selected segment.
Description	Short description of the statement item.

Filter Criteria section of the Cost Model Statement Item form

Field	Description
Segment accounts filter	Filter conditions to report on the segment accounts that meet your conditions.
Buckets Filter	Filter condition to the buckets that allocate expenses to the accounts in the segment.

Sub Segment section of the Cost Model Statement Item form

Field	Description
Sub Segment	Secondary segment for the segment you selected. Sub segments are segments under the selected segment in the cost model hierarchy.
Transactional table	Name of the transactional table that the sub segment refers to. Defaults based on the selected sub segment.
Sub Accounts Filter	Filter conditions to report on the segment accounts that meet your conditions.

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Service Charging section of the Cost Model Statement Item form

Field	Description
Service owner	User who owns the service and who views the consumption statement items. As a service charging owner, you can manage the showback items. You can view the unit cost, cost recovery based on consumption, and set unit price, discount, or surcharge to the showback item.
Pricing policy	Pricing policy can be set for the statement item at any of the following levels: ○ **Statement item level**: The price adjustment that you do in the console reflects at the statement item level. ○ **Statement item breakdown level**: Reflects the adjusted price at the statement item breakdown level. ○ **Account level**: The adjusted price is reflected at the account level in the expense lines.
Pricing policy method	Price adjustment based on a percentage of the average unit cost of the segment account. Or, overriding the average unit cost by unit price pricing policy method. **Note:** If the pricing policy is at account level, then you can opt for percentage based pricing policy method.

5. Click **Submit**.
6. To generate charge lines for the cost model statement item, click **Generate Charge Lines**.
   a. To generate the charge lines, enter the fiscal period in the Generate charge lines dialog box.
   b. Click **OK**.

   The statement lines generated for showback are extension of the expense lines.
7. To save the updated record, click **Update**.
8. To delete a record, click **Delete**.

What to do next

To create breakdown records for the cost model statement item, click **New** in the Cost Model Breakdowns related list.

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Create cost model breakdowns

Create breakdowns for the cost model statement item providing more clarity by reporting the components that constitute the cost model statement item and the cost associated with each of these components.

Before you begin

Role required: service_charging_analyst

Important:

This feature is available only when you own an ITBM Analyst license.

About this task

For example, Electronic Messaging statement item can provide the breakdown details of its component services such as Data Network and Storage. Each of these items provides the associated cost calculated by the set unit cost of each item.

Procedure

1. Click **New** in the Cost Model Breakdowns related list to create breakdown records for the cost model statement item that you created.
2. On the form, fill in the fields.

Cost Model Breakdown form

Field	Description
Name	Name of the cost model breakdown.
Statement item	Header under which the consumption details of the business service appear.
Table	Name of the transactional table the segment refers to.
Unit cost metric	Allocation metric that is used to calculate the unit cost.
Segment accounts filter	Filter applied to data in the segment accounts.
Buckets Filter	Filter applied to buckets that allocate expenses to the segment accounts.
Sub Segment	Segments added as sub segments to allocate expenses to records in the sub segment.
Sub Accounts Filter	Filter applied to data in accounts that fulfill the condition.

3. Click **Submit**.

Define a service catalog statement item

A business service can be represented by a service catalog category or a catalog item. When a service request from the service catalog is fulfilled, the price listed for the service in the service catalog item is captured as the cost of the statement item for a fiscal period.

Before you begin

Role required: service_charging_analyst

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Important:

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Procedure

1. Navigate to **All** > **Financial Charging** > **Administration** > **Statement Items**.
2. Click **New**.
3. Click **Service Catalog Statement Item**.
4. On the form, fill in the fields.

Service Catalog Statement Item form

Field	Description
Name	Name of the service catalog statement item.
Business Service	Business service that uses the statement item as a configured item. You can create a service.
Catalog	Catalog on which the statement item should be reported. Shows the list of catalogs in the system.
Category	Catalog items under the selected Category that are used for reporting the consumption details.
Catalog item	Catalog items under the selected Catalog and Category for which the consumption is reported.
Active	Check box to make the service catalog statement item active.
Fiscal Unit	Fiscal unit should be a month, quarter, or a period based on the fiscal calendar for which the statement item is generated.
Description	Short description of the statement item.

Service Charging section of the Service Catalog Statement Item form

Field	Description
Service owner	User who owns the business service and who views the service catalog statement items. A service owner can manage the showback items, view the unit cost, cost recovery based on consumption, and set unit price, discount, or surcharge to the showback item.
Pricing policy	Pricing policy can be for the statement item at any of the following levels:

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Field	Description
	○ **Statement item level**: The adjusted price reflects at the statement item level. ○ **Statement item breakdown level**: The adjusted price reflects at the statement item breakdown level. ○ **Catalog item level**: The adjusted price reflects at the individual catalog item level in the expense lines.
Pricing policy method	Price adjustment based on a percentage of the average unit cost of the catalog item. Or, overriding the average unit cost by unit price pricing policy method. **Note:** If the pricing policy is at catalog item level, then you can opt for percentage-based pricing policy method.

5. Click **Submit**.
6. To generate charge lines for the service catalog statement item, click **Generate Charge Lines**.
   a. To generate the charge lines, enter the fiscal period.

      Note:

      Charge lines for a service catalog statement item are generated based on the preconfigured Opened (system property value is opened_at) date field in the Requested Items table. The dates of the requested items that fall within the fiscal period are considered for generating the charge lines. However, as a service charging analyst you can configure the system property (com.snc.showback.catalog.consumed_date) value to a date field of your choice in the Requested Items (sc_req_item) table.

   b. Click **OK**.
7. To save the updated record, click **Update**.
8. To delete a record, click **Delete**.

What to do next

To create breakdown records for the service catalog statement item, click **New** in the Service Catalog Breakdowns related list.

Create service catalog breakdowns

Create service catalog breakdowns by fragmenting the service catalog category of the business service to its catalog item components into a more detailed level.

Before you begin

Role required: service_charging_analyst

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Important:

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About this task

For example, the IT Services Consumables statement item can provide the breakdown details of its component consumables such as Tablets and Laptops. Each of these items can be further broken down to more details. Tablets can be Google nexus, iPads, and so on with the associated price used for each unit of the item.

Procedure

1. Click **New** in the Service Catalog Breakdowns related list to create breakdown records for the service catalog statement item that you have created.
2. Fill in the form fields.

Service Catalog Breakdown form

Field	Description
Name	Descriptive name of the service catalog breakdown.
Statement item	Defaults to the type of the statement item.
Category	Catalog items under the selected category are used for reporting the consumption details.
Catalog item	Item under the selected Catalog and Category for which the consumption is reported.

3. Click **Submit**.

Drill down within a statement item

You can drill down within a statement item to visualize a subset of its data.

Before you begin

Role required: service_charging_analyst

Important:

This feature is available only when you own an ITBM Analyst license.

About this task

Drill down within a statement item to see the entity or the key field that has the data retrieved from the source table. You can also see the basis on which the mapping is done to the particular field that has the relevant data to retrieve. You can also edit and change the drilldown method and use the weighted method. In such a case, the system uses the weighted metric to retrieve data from the source table.

Procedure

1. Navigate to **All** > **Financial Charging** > **Administration** > **Statement Item Drilldowns**.
2. Click **New** to create a statement item or click the name of an existing statement item drilldown that you want to edit.
3. Click the type of statement item that you want to drill down.

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4. Based on the type of statement item drilldown that you select, fill in the relevant form fields.

Statement Item Drilldown form

Field	Description
Name	Name of the statement item drilldown.
Drilldown basis	Lower level access of the item based on the mapped field or the weighted metric method. For more information, see Allocation metrics.
Table	Source table that has the statement item information.
Type	Type of the statement item, determined based on the source from where the information is retrieved. You cannot edit the field as you have already selected the type of statement item drilldown that you want to perform.
Mapping field	Maps to the field in the table which has the drilldown data.
Weighted Metric	Drilldown on calculations based on an aggregate value from a segment.
Cost model	Cost model for which the drilldown can be applied.

5. Click **Submit** to enter a record or **Update** if you have edited an existing record.

What to do next

After you define the statement items, associate the statement items to the showback statements. You can use the showback statement to report consumed services to the business unit head, which displays the detailed service charge lines that the unit has utilized as a part of the business service. For example, Email service is a business service. When a business unit uses the email service, then the service charges for consuming the email services are reported as a showback statement to the business unit head or the department head.

Define, generate, and publish a showback statement

Showback tells the consumers what it costs a service organization such as IT to deliver services to them. Defining a showback statement helps to capture the reporting entity (for example, a business unit) to whom you want the showback statement to be reported to.

Before you begin

Role required: service_charging_analyst

Important:

This feature is available only when you own an ITBM Analyst license.

About this task

The showback statement is a collection of charges representing the statement items (the services consumed by the business unit) and is generated for a fiscal period.

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Showback statements provide the business unit a visibility of the services consumed and the charges associated with these services. It also brings an awareness and helps them to be judicious in using the business services and conscious of the cost factor associated with it.

You can create multiple showback statements based on the same Statement Item by drilling down to its lowest level. The showback statements can be for different reporting entities. For example, you can use a drilldown entity that has the source data on a Statement Item to create showback statements for different reporting entities such as a Cost Center, Business Unit, or Department.

Procedure

1. Navigate to **All** > **Financial Charging** > **Administration** > **Showback Statement Definition**.
2. Click **New** to create a showback statement definition or click the name of an existing showback statement definition that you want to edit.
3. Fill in the form fields.

Showback Statement Definition form

Field	Description
Name	Name of the showback statement definition.
Description	Description for the showback statement definition.
Reporting entity	Report generated to show the entity of its consumption details.
Reporting user field	Reporting entity head who sees the report.
Frequency	Fiscal frequency for which the report is generated.
Reporting user group field	User group who can see the report. All the members of the user group can see the report.

4. Click **Submit** to save the record or **Update** if you have edited an existing record.
5. Click **Generate** to generate the showback statement for the selected fiscal period.

   The generated report is made available for viewing purpose to the reporting entity (business unit). The showback statement gives the information that the reporting entity has used the services mentioned in the statement lines.

   As a financial analyst, you can generate the showback statement and publish it so that the showback user can view it.

   As a designated showback user (normally a business unit owner or a business unit finance lead), you can view the published showback statements assigned to you or your unit. You can review and accept them or raise a dispute if there is discrepancy and resolve it with the service owner or service charging analyst through the task workflow.

6. Click **Publish**.

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a. Select the fiscal period in the **Fiscal Period** choice list of the Publish showback statement pop-up that opens up.

b. Click **OK**.

Note:

The fiscal period for which you have generated and not yet published the showback statement is listed in the choice list. By publishing, the showback statement for the said fiscal period is available and the showback users can view it in My Showback Statements menu in the application navigator.

7. Click **Delete** to delete the record.

Create statement lines for the Showback Statement by clicking the Showback Statement Line Definitions **New** button.

What to do next

Monitor the showback statements in the service pricing console.

Service charging

As a service owner, you can use the Service Pricing Console to monitor the consumption of the services, the status of each statement item, and can set the pricing for the statement items.

Important:
This feature is available only when you own an ITBM Analyst license.

As a service charging analyst, you can analyze and research on the economic trends and conditions of the business and make necessary charging recommendations for the business service.

Monitor service charges in the service pricing console

As a service owner use the service pricing console to generate service charge lines, view the service charge lines, and set pricing policy. Setting the pricing policy generates the rate card, which captures the set price, surcharge or discount details.

Before you begin

Role required: service_charging_owner

Important:

This feature is available only when you own an ITBM Analyst license.

Procedure

1. Navigate to **All** > **Financial Charging** > **Service Charging** > **Console**.

   Open the console to monitor all the details related to the statement items in the following panes:

   My Statement Items: A list of all the statement items owned by the service owner appear on the left pane.

2. Click the statement item on the left pane, the details of which you want to view.
3. Click the **Fiscal Period** choice list to select a fiscal period.

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4. Click **Generate Lines** to generate charge lines for the statement item for the specified fiscal period.

   The Generate Charge Lines pop-up opens up.

   Note:

   You can view the list of service charge lines generated based on the statement item by navigating to **Financial Charging** > **Service Charging** > **Service Charge Lines**. These service charge lines are records that you can monitor on the console.

5. Update the fiscal period for the period that you want to generate the charge lines.
6. Click **Generate**.

   A message appears confirming that the Charge lines generation job has been scheduled successfully.

   The statement item details pane on the right displays all the details of the statement item.

   Overview tab:

   - Pricing, cost, and charges: The left pane displays the details of the pricing policy method and the pricing policy adopted for the statement item. It also shows the total cost of the statement item and the total charges that has been charged for the statement item.
     - **Costs** are the actual expenses by service. It is the amount that you incur in buying a product or a service.
     - **Price** is the amount that is determined for a product or a service based on cost factors involved in production, marketing, selling, and so on.
     - **Charge** is the amount of money you are charged by the business service for the services or goods they provided.
   - **Cost trend**: The spline chart shows the trend of the cost against the price over the different fiscal periods.
   - **Charge lines**: The service charge lines are generated for statement item. Each service charge line lists the name of the product or the service used and the associated unit cost of the item computed with the quantity, giving you the total cost.

   Charge line column heads

Field	Description
Name	Name of the statement item.
Average unit cost	Average cost of one unit of the statement item.
Quantity	Number of items at the statement item and at the statement item breakdown level.
Total cost	Unit Cost * Quantity.
Price Adjustment (%)	Price adjustment is based on the pricing policy method that you defined in the statement item definition form. Adjust the price either on percentage or unit price by incrementing or decrementing a

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Field	Description
	percentage of the Average Unit Cost. The adjusted price reflects as the Total Charges.
Unit Price	Sets a predefined unit rate for a service. It is determined for a quantity of service that is delivered or the cost of a single statement item.
Total Charges	Total amount of money charged for each business service, which is the adjusted price of the average unit cost.

7. Click **Set Pricing Policy** button.

   You can see more details of the statement item in the right pane of the console that opens up.

8. Click the statement item level or the statement item line level price adjustment box (based on the pricing policy that you have set) to adjust the price and arrive at the total charges.
9. Click **Set Price**.

   The price adjustment that you made reflects in the **Total Charges** field.

10. Click the Drilldown tab to view the drilldown details of the statement items at the drilldown entity level.

    You can view the statement item breakdown or compare it with the other charge line item breakdowns to get better visibility on cost by breakdown.

    Drilldown tab:

    - **Drilldown**: Click **Drilldown** field to view the detailed data of statement item's cost by breakdown for each drilldown entity on a chart.
    - **Charge line item Breakdown**: Click **Charge line item Breakdown** field to view the charge line item breakdown by cost for each statement item breakdown.
    - **Charge line item Breakdown accounts**: Click **Charge line item Breakdown accounts** field to view the accounts for each service charge line of the statement item breakdown.

What to do next

The charges that you define are attached as a rate card to a statement item. As a service charging analyst and service charging owner, you can also define service charge price rate cards.

Create ratecards to fix price for your business service

Create a ratecard that lists prices for your business service or business service components. As a service owner, you can create a ratecard for a statement item, which represents the business service that you own. The ratecard is based on the pricing policy method attached to the statement item for a fiscal period.

Before you begin

Role required: service_charging_analyst, service_charging_owner

Important:

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About this task

The ratecard for a fiscal period defaults to the next fiscal period if you do not set a new pricing policy for the statement item before the charges of the next fiscal period are published.

Procedure

1. Navigate to **All** > **Financial Charging** > **Service Charging** > **Service Charge Rate Cards**.
2. Click **New** to create a service charge price rate card or click a record that you want to edit.
3. Fill in the form fields.

Service Charge Price Ratecards form

Field	Description
Statement item	Select the statement item for which you want to create a rate card.
Item table name	○ If it is a service catalog statement item, then the item table name is catalog item. ○ If it is a cost model statement item, then the item table name is the transaction table name of the segment. ○ If it is a consumption statement item, then the item table name is the consumption table.
Service charging type	Defaults from the statement item. It can be percentage based or unit price based.
Fiscal period	Period for which the rate card is valid.
Statement item breakdown	The breakdown line details of the statement item.
Item name	Refers to a record in the item table.
Percentage	A percentage of the average unit cost, which you can set at the statement item level, statement item breakdown level, or item level of the consumption based statement item or catalog based statement item; or, at the account level of the cost model based statement item.
Unit price	Set the unit price only for the item level pricing policy. The unit price represents the price displayed to the business users.
Short description	Meaningful short description for the rate card.

4. Click **Submit** or **Update**.

What to do next

As a service charging analyst, you can view all the showback statements that are generated. The showback users can view the showback statements only when you publish the showback statements that you have generated.

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Showback statements

Showback, an information technology strategy of financial charging, tracks the costs of IT hardware, software, cloud services, or any shared services that are used by a business unit.

Important:

This feature is available only when you own an ITBM Analyst license.

The costs are then consolidated and presented to the business unit, as a reporting invoice (showback statements), to show the quantum of services and products they have consumed over a fiscal period.

The HR business unit of an organization might request Attendance Management System business application to manage the attendance of their employees. The process of procuring the license, installing, and maintaining this application on twenty computers of the HR staff who process the attendance in the HR department incurs a cost. The IT department tracks this cost and reports the expense in the form of a showback statement to the HR business unit head.

View all showback statements

As a service charging analyst, you can view the list of all showback statements that are generated. You can determine the reporting entity or the user group that the report is intended for.

Before you begin

Role required: service_charging_analyst

About this task

Generate the showback statements, redetermine the total cost of the statement expense lines for the fiscal period, and publish the statements for the showback user to see. You can also create a showback statement.

Procedure

1. Navigate to **All** > **Financial Charging** > **Showback** > **All Showback Statements**.
2. To create a showback statement, Click **New**.
3. To edit an existing showback statement record, click **New**.
4. On the form, fill in the fields.

Showback Statement form

Field	Description
Reporting entity	Business entity that availed the business service.
Fiscal period	Period for which the showback statement is generated.
Assigned to	Business unit head or department head who would see the showback statement.
State	Status of the showback statement. ○ Draft: The report is in a draft stage. ○ Published: The report has been published, which means the reporting user and the users belonging to the reporting user group

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Field	Description
	with the showback user role can see the report. ○ Disputed: The showback user has seen the report and has raised a dispute as the user has a disagreement about the contents of the statement expense line. ○ Closed: When the showback user accepts the statement item, the statement item moves to the Closed state.
Total cost	The total cost of all the statement expense lines.
Assignment group	Group that the statement item is assigned to.
Short description	Meaningful short description for the showback statement.
Additional comments (User visible)	Comments or notes in complete sentences and paragraphs because users view these comments. The user gets a copy of all information saved in the field.
Work notes	Work notes for internal communication only.

5. To save the showback statement, click **Submit**.
6. To save the edited record, click **Update**.
7. To acknowledge the expenses reported in the showback statement, click **Accept**.
8. To delete the record, click **Delete**.

What to do next
Add statement expense lines and statement expense line details to the showback statement using the Showback Statement related list.

Add statement expense line

At the statement item breakdown level, add the number of units consumed, unit rate of the item, and the total cost of all items. Just as an invoice has printed line items, detailing the expense list, the statement item also has the expense details reported as statement expense lines in the showback statement.

Before you begin
Role required: service_charging_analyst

Procedure
1. Click **New** in the Statement Expense Lines related list.
2. On the form, fill in the form fields.

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Statement Expense Line form

Field	Description
Showback statement	Defaults to the showback statement reporting entity.
Statement item	Select the statement item that is to be listed as the statement expense line from the choice list.
Volume	Number of items consumed (in units).
Cost	Calculated as Unit rate * Volume.
State	Status of the statement expense line. ○ **Pending**: Showback statement is not published, the statement expense line is in the Pending state. (The showback statement is in the Draft state.) ○ **Processed**: The showback statement is published, statement expense lines are in the Processed state. (Showback statement is in Published state.) ○ **Disputed**: If the statement recipient perceives the volume or unit rate of a statement expense line to be incorrect, then the recipient can raise a dispute. (If the statement expense line is disputed, the showback statement is also in a Disputed state.) ○ **Accepted**: The showback user accepts the statement expense lines. (The showback statement is Closed.)
Statement item breakdown	Select the statement item breakdown that you want to be listed for the statement item.
Unit rate	Rate at which the reporting entity is charged for one unit of the item.

3. Click **Submit**.

What to do next

Add expense line details for the statement expense line of the statement item.

Add statement expense line details

Adding expense line details is drilling down to one more level of the statement expense line. Add the number of units consumed, the unit rate at which the item is charged, and the total amount of the expense line at the item level, catalog item level, or account level.

Before you begin

Role required: service_charging_analyst

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Procedure

1. Click the Statement Expense Line related list.
2. Click **New**.
3. On the form, fill in the fields.

Statement Expense Line Details form

Field	Description
Statement expense line	Select the statement expense line from the options list.
Unit rate	Rate at which the reporting entity is charged for one unit of the item.
Volume	Number of items consumed (in units).
Amount	Volume * Unit rate.

4. Click **Submit**.

Generate showback statements for upcoming fiscal period

As a service charging analyst, review the status log of all showback statements for the last fiscal period that the statements were generated for and the date that the showback statements were published on.

Before you begin

Role required: service_charging_analyst

About this task

You can also create a record or log of the last generated and published details of a showback statement, and generate the statement for the next fiscal period.

Procedure

1. Navigate to **All** > **Financial Charging** > **Showback** > **Generate Showback**.
2. Click **New** to create a showback run log or click the **Status** of an existing showback log record that you want to edit.
3. On the form, fill in the fields.

Showback Run Log form

Field	Description
Fiscal period	Select the statement expense line from the options list.
Status	Status of the showback statement.
Showback	Definition of the showback statement.
Last generated	Date on which the statement was last generated.
Published	Check box to indicate whether the statement has been published or not.

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Field	Description
Published date	Date on which the statement was last published.

4. Click **Submit** if you have created a log or click **Update** if you have edited an existing log.
5. Click **Delete** to delete the record.
6. Click **Generate Statement** to generate a showback statement for a fiscal period.

   a. Select the showback statement in the **Showback Statement Definition** field of the Generate Showback Statement pop-up that appears.

   b. Select the fiscal period in the **Fiscal Period** field.

   c. Click **Generate**.

   Refresh the Showback Run Logs list to see the status of the showback statement change to Generated.

   Note:

   The **Published** column indicates whether the showback statements have been published or not by the status of true or false. If the status is false, it means that the showback is not yet published and available for the showback user to see.

   Review the generated showback statement and publish the statement for the showback user to see the report, by navigating to Showback Statement Definition.

What to do next

After you publish the showback statement, the showback user can see the showback statement in My Showback Statements.

View my showback statements as a showback user

As a showback entity owner, you can view all the showback statements that are assigned to you. You can review statements and raise a dispute if there is discrepancy or accept them.

Before you begin

Role required: showback_user

Important:

This feature is available only when you own an ITBM Analyst license.

Procedure

1. Navigate to **All** > **Financial Charging** > **My Showback Statements**.
2. View the list of showback statements that are assigned to you.
   - **Fiscal period**: Period that the showback statement is generated for.
   - **Total cost**: Cost of the service that you have been charged for.
   - **State**: Status of the showback statement.
   - **Assigned to**: Reporting entity user that utilized the service.

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If you have a disagreement to any or all the statement lines, you can raise a dispute.

3. To raise a dispute, use the **Raise a dispute** UI action from the Statement expense line of the showback statement or navigate to My Open Disputes.

Raise a dispute

As a showback user, if you disagree with any of the information on a statement expense line, then you can raise a dispute.

Before you begin

Role required: showback_user

Important:

This feature is available only when you own an ITBM Analyst license.

Procedure

1. Navigate to **All** > **Financial Charging** > **My Open Disputes**.
2. In the Statement Disputes list, click **New** or click the Number in the Statement disputes list.
3. On the form, fill in the fields.

Statement Dispute form

Field	Description
Number	Sequential number for the dispute.
Statement expense line	Expense line from the choice list that you disagree with.
Opened by	Defaults to the user name who is raising the dispute.
Assigned to	Dispute assigned to the service charging owner, if it is related to pricing policy, unit rate, volume, or total cost. Assign the dispute to service charging financial analyst, if there is a disagreement with the showback statement.
Reason code	Appropriate reason code from the choice list.
State	Status for the dispute: ○ **Open**: The showback user raises a dispute. ○ **Work in progress**: The service charging owner or service charging analyst is working on the dispute. ○ **Closed complete**: The dispute is resolved and closed. ○ **Closed incomplete**: The dispute is not resolved, but closed. ○ **Closed skipped**: The disputed expense line is skipped and closed.

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Field	Description
Reason	Description of the dispute.
Additional comments (Customer visible)	Comments or notes, in complete sentences and paragraphs, for the service charging owner and service charging analyst to understand and resolve the dispute easily.
Work notes	Work notes for internal communication only.
Statement expense line details	Expense line of the showback statement that the dispute is raised for.

4. To complete the submission of the dispute, click **Submit** or to update an edited dispute, click **Update**.
5. If you have reviewed the resolution for the dispute that you raised earlier, click **Close**.
6. To delete the record, click **Delete**.

What to do next

As a service charging owner, you can navigate to **My Open Disputes** to view the statement disputes raised by the showback user and resolve the disputes.

If the service charging owner is not available to resolve the issue, the service charging analyst, as a super user with special privileges, can resolve any open dispute in **My Open Disputes**.

View my statement items as a service owner

As a business service owner, you can view the list of statement items for which you are the service charging owner and you can generate the charge lines for a fiscal period.

Before you begin

Role required: service_charging_owner

Important:

This feature is available only when you own an ITBM Analyst license.

About this task

After the service charging analyst publishes the showback statements, you can review them for any disputes raised by the showback user and manage the statement expense lines. You can view the unit cost, cost recovery based on consumption, and set unit price, discount, or surcharge to the statement item.

Procedure

1. Navigate to **All** > **Financial Charging** > **My Statement Items**.
2. View the list of statement items for which you are the service charging owner.
3. Review the statement item service charging details.
4. Click **Generate Charge Lines**.
5. In the **Fiscal Period** choice list of the Generate charge lines pop-up, select the fiscal period.
6. Click **OK**.

What to do next

You can view the statement items in the business unit owner showback dashboard.

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Financial analyst showback dashboard

As a financial analyst, you can use the Financial Analyst Showback dashboard central interface to view all the showback statements that are generated. The dashboard helps to analyze the cost of delivering services to the business and the recovery or showback of that cost.

Important:

This feature is available only when you own an ITBM Analyst license.

You can also navigate to **Financial Charging** > **Showback** > **Dashboard** to access this dashboard.

The data are retrieved from the ITFM_Charge_Expense_Line_Details table.

Last Period Total Cost

Shows the total cost of delivering services in the last period.

Last Period Total Charges

Shows the total amount charged for all business services, based on the adjusted prices.

Last Period Charge vs. Cost Variance

Shows the difference between the total charges and total costs for the last period.

YTD Charge vs. Cost Variance

Displays the difference between the total charges and total costs year to date.

Charge vs. Cost

Shows charges as bar charts versus the cost trend for the completed fiscal periods.

Last Period Total Cost Breakdown

Lists the total cost breakdown details of the statement item or business units for the last period.

Business unit owner showback dashboard

As a business unit owner, you can use the Business Unit Owner Showback dashboard interface to see the statement items assigned to the business unit owner, set the pricing policy, and view the last period cost.

Important:

This feature is available only when you own an ITBM Analyst license.

You can also navigate to **Financial Charging** > **My Showback Dashboard** to access this dashboard.

Last period cost

Displays the sum of the cost that is shown for all statement items by the business unit.

By statement item

Lists the statement items and the cost for a fiscal period.

Showback statements

Lists all the showback statements owned by the business unit owner.

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Quick start test for Financial Management

Validate that Financial Management still works after you make any configuration change such as apply an upgrade or develop an application. Copy and customize these quick start tests to pass when using your instance-specific data.

Financial Management

Financial Management quick start tests require activating the Financial Management Core - ATF Tests plugin (com.snc.financial_management.atf)

ITFM: Financial Modeling flow test suite

Test	Description	Release version
Verify FM Cost Allocation Flow	Verify the cost allocation flow in financial modeling.	Madrid

To learn more about Financial Management, see Financial Management.

Related topics

Quick start tests

Financial Management Platform Analytics Solutions

Platform Analytics Solutions contain preconfigured dashboards. These dashboards contain actionable data visualizations that help you improve your business processes and practices.

Note:
You can activate Performance Analytics solutions and in-form analytics on instances that have not licensed Performance Analytics to evaluate the functionality. However, to start collecting data you must license Performance Analytics.

Platform Analytics Solutions

Platform Analytics data visualizations use Performance Analytics indicator data to show you data over time, helping you analyze your business processes and identify areas of improvement. With Platform Analytics Solutions, you can get value from Performance Analytics for your application with minimal setup. You can always create your own objects as well.

Important:
Set up and test Platform Analytics Solutions on a non-production instance before enabling them in production.

To enable the solution for Financial Management, an admin can navigate to **Performance Analytics** > **Guided Setup**. Click **Get Started** then scroll to the section for Financial Management. The guided setup takes you through the entire setup and configuration process.

To access the ITFM prescriptive dashboards, you require the Performance Analytics – Content Pack – Financial Management (com.snc.pa.fm) plugin. To get the cost data in the Total Expenses YTD widget, you also require Performance Analytics – Premium (com.snc.pa.premium) plugin.

The ITFM prescriptive dashboards are based on the prescriptive cost models that you have chosen for the financial model activities of your business enterprise.

Navigate to **Financial Modeling Analyst: To track the total spend of business applications** > **ITFM Prescriptive Dashboards** to access the prescriptive dashboards.

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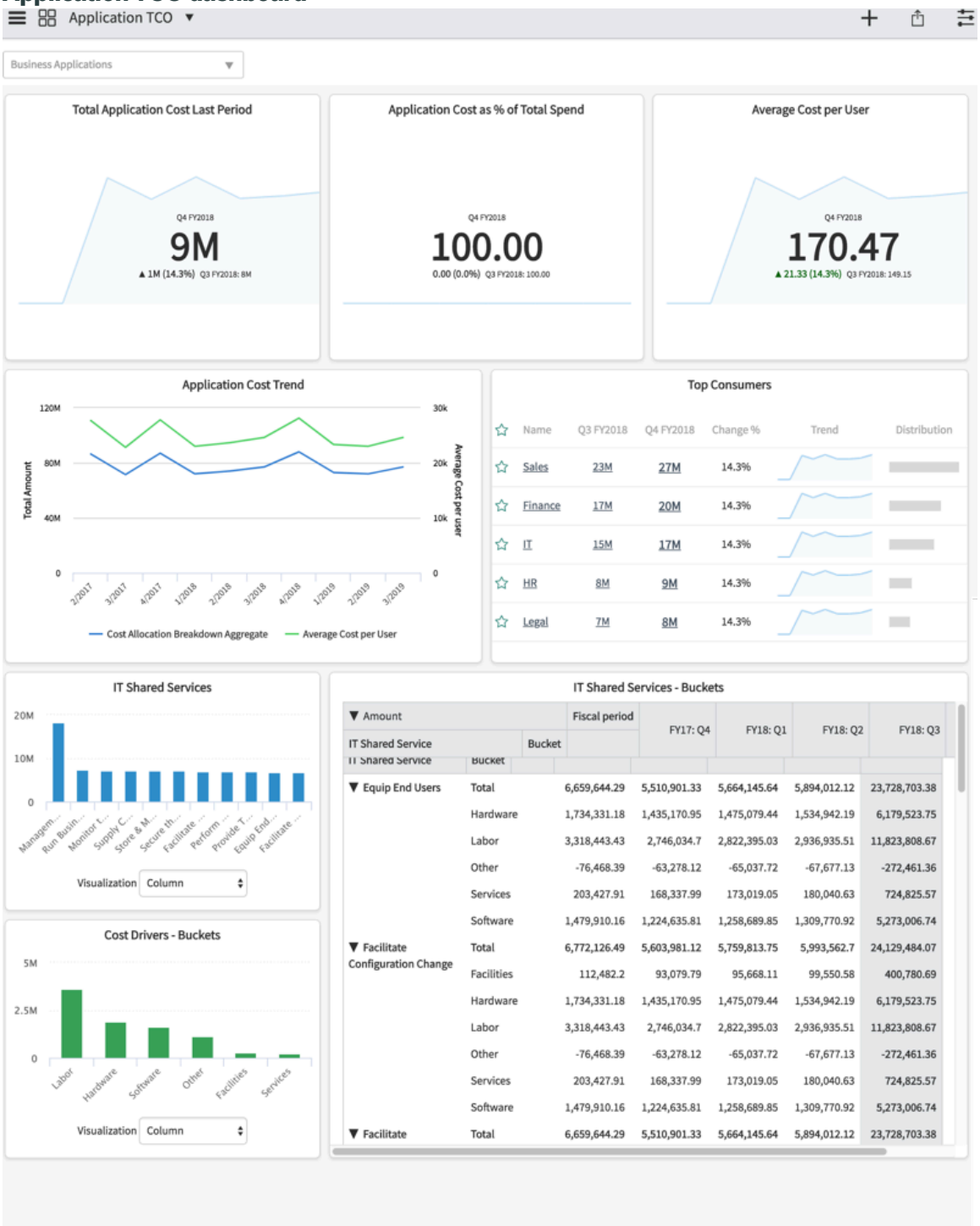
Related topics

- Platform Analytics Solutions
- Activate your Performance Analytics subscription

Financial Management Application TCO dashboard

The Application total cost of ownership (TCO) dashboard provides a view into a business application and enables you to know the total amount spent on the application in the last fiscal period. You can also compare its current cost of ownership with its cost incurred in the past fiscal period, thereby forecast its future expenses.

Application TCO dashboard



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End user and roles

End user and goal	Required role
Financial Modeling Analyst: To track the total spend of business applications. Administrator: To track the cost of application in addition to the cost of using and maintaining it.	cost_transparency_admin
Financial Modeling Analyst: To track the total spend of business applications. Analyst: To predict the future total cost of ownership of the application based on its past trend and determine the affordability of its ownership cost.	cost_transparency_analyst

Indicators

Total Expenses Fiscal Quarterly – Application Cost Model

The indicator collects fiscal quarterly total cost data for the Business Applications and Business Unit based on the Level 2 Costing – Business Applications cost model.

% Application cost for total spends

Formula used to calculate the percentage of an application cost out of the total cost of all business applications.

Average Cost Per User – Application

Formula used to calculate the average cost of applications consumed by a user.

Total Expenses Fiscal Quarterly Breakdowns – Application Cost Model

The indicator collects fiscal quarterly breakdown data for the business applications and business unit of the Level 2 Costing – Business Applications cost model.

Total Expenses Fiscal Quarterly Breakdowns – ITSS – Application Cost Model

The indicator collects fiscal quarterly aggregated data that is rolled up from the IT Shared Services to the Business Applications of the Level 2 Costing – Business Applications cost model.

Total Expenses Fiscal Quarterly Breakdowns – Application Cost Model

The indicator collects fiscal quarterly cost allocation aggregated data. The data is rolled up from the Business Application to the Business Unit of the Level 2 Costing – Business Applications cost model.

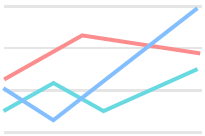
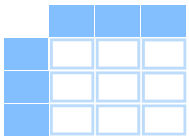
Breakdowns

Business applications.

Data Visualizations

The Application TCO dashboard includes the following visualizations:

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Title	Type	Description
Application Cost Trend	 Line	Displays the trend of cost allocation breakdown aggregate and average cost per user by quarterly fiscal period, with the amount and percentage calculation.
IT Shared Services – Buckets	 Pivot	Gives a tabular view of the bucket amounts allocated to all the accounts within the IT shared services segment in the last four quarters.

Financial Management Business Application Costing dashboard

The Business Application Costing dashboard provides an executive view into the total expenses on business applications consolidated for a quarter and year-to-date. The dashboard provides visibility on the application cost to an extent that you can drill the data on top spenders down to the buckets that contribute to the application cost, and business units that use the applications.

The dashboard is based on the Business Applications Costing cost model. This cost model aligns business applications to business units and hence enables you to know the cost of applications that support each business unit.

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Business Application Costing dashboard



End user and roles

End user and goal	Required role
Financial Modeling Analyst: To track the total spend of business applications. Administrator:	cost_transparency_admin

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End user and goal	Required role
To track the amount spent on a business application.	
Financial Modeling Analyst: To track the total spend of business applications. Analyst: To predict the future cost of application based on its past trend, and determine whether to continue with the application or not.	cost_transparency_analyst

Indicators

Total Expenses Fiscal Quarterly – Application Cost Model

The indicator collects fiscal quarterly total cost data for the Business Applications and Business Unit of the Business Applications Costing cost model.

Total Expenses Fiscal Quarterly Breakdowns – Application Cost Model

The indicator collects fiscal quarterly cost allocation aggregated data, rolled up from the Business Application to the Business Unit of the level 2 cost model.

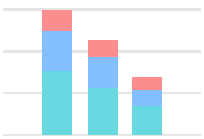
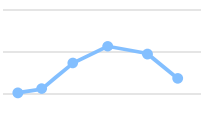
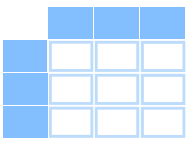
Average Cost Per User – Application

Average cost of applications consumed by a user.

Breakdowns

- Business unit.
- Business applications.
- Buckets – Application Cost.

Data visualizations

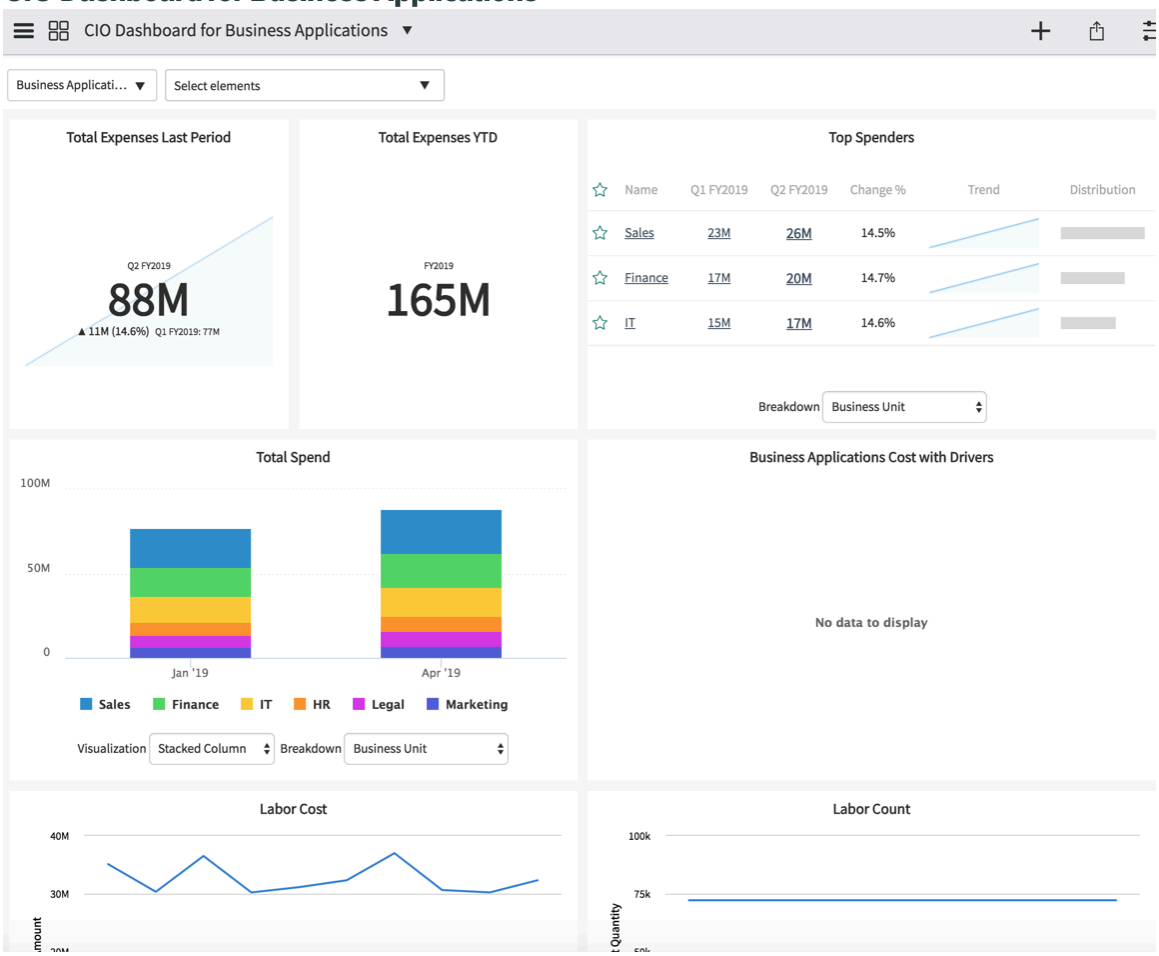
Title	Type	Description
Business Applications Cost with Drivers	 Bar	Displays the amount that each account in the Business Application consumes from different buckets (cost pools).
Average Enterprise Cost per CPU	 Spline	Displays the trend of average unit cost per CPU.
Business Unit – Business Application	 Pivot	Gives a tabular view of the amount breakup spent by the business units on the applications for the last four quarters.

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Financial Management CIO dashboard for Business Applications

The CIO dashboard measures the real-time performance of business applications and provides accurate, up-to-date data in a readily viewable form to support your decisions.

CIO Dashboard for Business Applications



End user and roles

End user and goal	Required role
Financial Modeling Analyst: To track the total spend of business applications.	cost_transparency_analyst
Read only role for Financial Management: To view the dashboard and its reports.	sn_itfm_read

Indicators

Total Expenses Fiscal Quarterly – Application Cost Model

The indicator collects fiscal quarterly total cost data for the Business Applications and Business Unit of the Business Applications Costing cost model.

Total Expenses Fiscal Quarterly Breakdowns – Application Cost Model

The indicator collects fiscal quarterly cost allocation aggregated data, rolled up from the Business Application to the Business Unit of the Business Application Costing cost model.

Average Cost Per User – Application

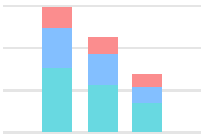
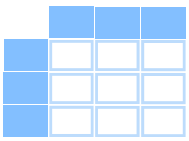
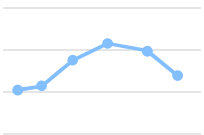
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Average cost of applications consumed by a user.

Breakdowns

- Business unit.
- Business applications.

Data visualizations

Title	Type	Description
Business Applications Cost with Drivers	Stacked bar  chart	Displays the amount that each account in the Business Application consumes from different buckets (cost pools).
Labor Cost	Line chart 	Displays the amount coming from the labor bucket that is allocated to Business Unit segment from the business application segment for each fiscal period.
Labor Count	Line chart 	Unit quantity of labor bucket for each fiscal period.
Business Unit – Business Application	Pivot  chart	Tabular view of the amount breakup spent by the business units on the applications for the last four quarters.
Average Enterprise Cost per CPU	Spline  chart	Displays the trend of average unit cost per CPU.

Financial Management Level 1 Costing – Shared Services dashboard

The Level 1 Costing – IT Shared Services dashboard provides an executive view into the total expenses consolidated for a quarter and year-to-date of top spenders. You can drill down to their business units or shared services.

Important:

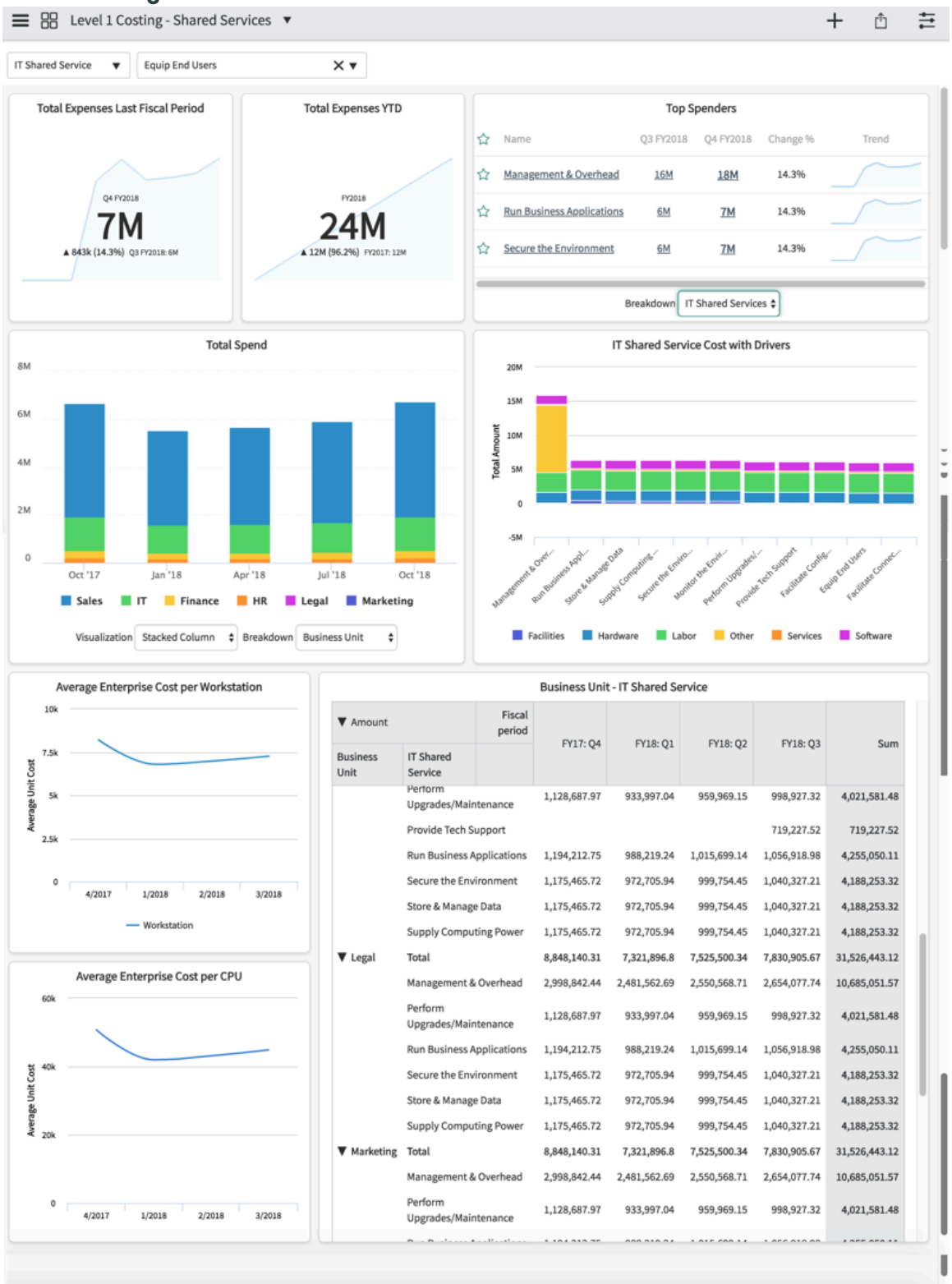
This feature is available only when you own an ITBM Analyst license.

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The dashboard gives visibility on the IT infrastructure cost, helps communicate to the business, the cost of shared services, and facilitates analyzing the trend for the future growth.

Level 1 Costing – Shared Services dashboard is a simple dashboard with a single view into all expenses. It is modeled on L1 Costing – Shared Services cost model. It provides two breakdowns that you can drill into to get specific cost information.

Level 1 Costing – Shared Services dashboard



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End user and roles

End user and goal	Required role
Financial Modeling Analyst: To track the total spend of business applications. Administrator: To track the IT infrastructure cost. To generate reports that show how much each IT shared service in a business unit is spending.	cost_transparency_admin
Financial Modeling Analyst: To track the total spend of business applications. Analyst: To take critical business decisions based on the total spend reports of IT infrastructure cost.	cost_transparency_analyst

Indicators

Total Expenses Fiscal Quarterly – Service Cost Model

The indicator collects fiscal quarterly breakdown data for the IT Shared Services and Business Unit of the Level 1 Costing – Shared Services cost model.

Total Expenses Fiscal Quarterly From Aggregates – Shared Services

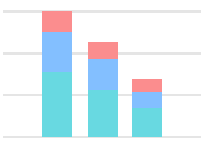
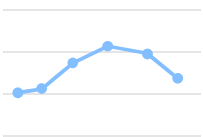
The indicator collects fiscal quarterly aggregated data, rolled up from the IT Shared Services to the Business Unit of the level 1 cost model.

Breakdowns

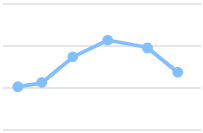
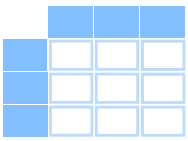
- Business Unit.
- IT Shared Services.

Data visualizations

The Level 1 Costing – Shared Services dashboard includes the following visualizations:

Title	Type	Description
IT Shared Service Cost with Drivers	 Bar	Displays the amount that each account in the IT shared services receives from different buckets (cost drivers).
Average Enterprise Cost per Workstation	 Spline	Displays the trend of average unit cost per workstation for the last four quarters.

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Title	Type	Description
Average Enterprise Cost per CPU	 Spline	Displays the trend of average unit cost per CPU.
Business Unit – IT Shared Service	 Pivot	Gives a tabular view of the amount spent by all the IT shared services within each business unit for the last four quarters.

Financial Management Level 2 Costing – Business Applications dashboard

The Level 2 Costing – Business Applications dashboard provides an executive view into the total expenses on business applications consolidated for a quarter and year-to-date.

Important:

This feature is available only when you own an ITBM Analyst license.

The dashboard provides visibility on the application cost to an extent that you can drill the data on top spenders down to the buckets that contribute to the application cost, and business units that use the applications.

The dashboard is based on the Level 2 Costing – Business Applications cost model. This cost model aligns business applications to business units and hence you can know the cost of applications that support each business unit.

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Level 2 Costing – Business Applications dashboard



End user and roles

End user and goal	Required role
Financial Modeling Analyst: To track the total spend of business applications. Administrator:	cost_transparency_admin

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End user and goal	Required role
To track the amount spent on a business application.	
Financial Modeling Analyst: To track the total spend of business applications. Analyst: To predict the future cost of application based on its past trend, and determine whether to continue with the application or not.	cost_transparency_analyst

Indicators

Total Expenses Fiscal Quarterly – Application Cost Model

The indicator collects fiscal quarterly total cost data for the Business Applications and Business Unit of the Level 2 Costing – Business Applications cost model.

Total Expenses Fiscal Quarterly Breakdowns – Application Cost Model

The indicator collects fiscal quarterly cost allocation aggregated data, rolled up from the Business Application to the Business Unit of the level 2 cost model.

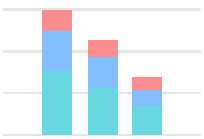
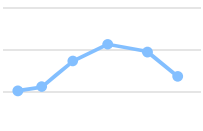
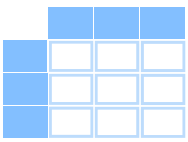
Average Cost Per User – Application

Average cost of applications consumed by a user.

Breakdowns

- Business unit.
- Business applications.
- Buckets – Application Cost.

Data visualizations

Title	Type	Description
Business Applications Cost with Drivers	 Bar	Displays the amount that each account in the Business Application consumes from different buckets (cost pools).
Average Enterprise Cost per CPU	 Spline	Displays the trend of average unit cost per CPU.
Business Unit – Business Application	 Pivot	Gives a tabular view of the amount breakup spent by the business units on the applications for the last four quarters.

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Financial Management Level 2 Costing – Business Services dashboard

The Level 2 Costing – Business Services dashboard provides an executive view into the cost of enabling a business service and aligning it to the business capabilities of an enterprise. The dashboard provides visibility on the cost of supporting a business service and helps understand the cost of the business services driven by the business units.

Important:

This feature is available only when you own an ITBM Analyst license.

The dashboard is based on Level 2 Costing – Business Services cost model that aligns business services to business units. Therefore, you can track the service cost for each business unit.

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Level 2 Costing – Business Services dashboard



End user and roles

End user and goal	Required role
Financial Modeling Analyst: To track the total spend of business applications. Administrator:	cost_transparency_admin

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End user and goal	Required role
To track the amount spent on a business service aligned to each business unit.	
Financial Modeling Analyst: To track the total spend of business applications. Analyst: To predict the future total cost of business service based on its past trend. Requires to constantly realign the business service with the customer needs and the organizational goals.	cost_transparency_analyst

Indicators

Total Expenses Fiscal Quarterly – Business Service Cost Model

The indicator collects fiscal quarterly total cost data for the Business Services and Business Unit of the Level 2 Costing – Business Services cost model.

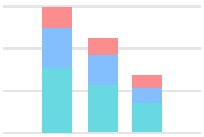
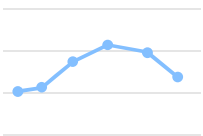
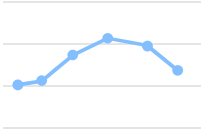
Total Expenses Fiscal Quarterly Breakdowns – Business Service Cost Model

The indicator collects fiscal quarterly cost allocation aggregated data that is rolled up from the Business Service to the Business Unit of the level 2 cost model.

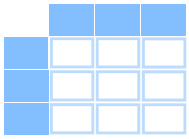
Breakdowns

- Business unit.
- Business service.

Data visualizations

Title	Type	Description
Business Services with Drivers	 Bar	Displays the total amount spent on business services stacked by buckets from which the amount is allocated.
Average Enterprise Cost per Workstation	 Spline	Displays the trend of average unit cost per workstation for the last four quarters.
Average Enterprise Cost per CPU	 Spline	Displays the trend of average unit cost per CPU.

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Title	Type	Description
Business Unit – Business Service	 Pivot	Gives a tabular view of the amount breakup spent by the business units on the business services for the last four quarters.

Financial Management Level 3 Costing – Business Capabilities dashboard

The Level 3 Costing – Business Capabilities dashboard provides an executive view into the total spend drilled down to the business units or business capabilities for a quarter and year-to-date. The dashboard provides visibility on the cost of supporting a business capability and helps communicate value in terms of the business functions aligned to the business capabilities.

Important:

This feature is available only when you own an ITBM Analyst license.

The dashboard is based on Level 3 Costing – Business Capabilities cost model. The model aligns the actual capability that is associated with a business application with the high-level business capability.

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Level 3 Costing – Business Capabilities dashboard



End user and roles

End user and goal	Required role
Financial Modeling Analyst: To track the total spend of business applications. Administrator:	cost_transparency_admin

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End user and goal	Required role
To track the amount spent on a business capability aligned to each business unit.	
Financial Modeling Analyst: To track the total spend of business applications. Analyst: To predict the future total cost of business capability based on its past trend. Requires to constantly realign the business capability with the changing business trends and requirements.	cost_transparency_analyst

Indicators

Total Expenses Fiscal Quarterly – Business Capability Cost Model

The indicator collects fiscal quarterly total cost data for the Business Capability and Business Unit of the Level 3 Costing – Business Capabilities cost model.

Total Expenses Fiscal Quarterly Breakdowns – Business Capability Cost Model

The indicator collects fiscal quarterly cost allocation aggregated data that is rolled up from the Business Capability to the Business Unit of the level 3 cost model.

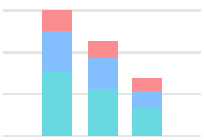
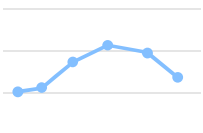
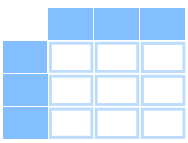
Average Cost Per User

Formula used to calculate the average cost of business capabilities per user.

Breakdowns

- Business unit.
- Business capability.

Data visualizations

Title	Type	Description
Business Capabilities with Drivers	 Bar	Displays the total amount spent on business capabilities stacked by buckets (cost pools) from which the amount is allocated.
Average Enterprise Cost per CPU	 Spline	Displays the trend of average unit cost per CPU.
Business Units – Business Capabilities	 Pivot	Gives a tabular view of the amount spent on the business capabilities by the business units for the last four quarters.

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Monetary and non-monetary benefit plans

Benefit plans capture the potential benefits accrued by the work item when the work item is executed. You can create benefit plans to specify the estimated benefits in a category for a fiscal period.

Monetary and non-monetary benefit plans capture the financial and non-financial benefits respectively. You can also associate monetary and non-monetary benefit plans with each other, so that you can capture the potential benefits (financial and non-financial) accrued by the work item for the hybrid benefit plans.

Benefit Plans in Project Management

- Create a monetary benefit plan for a project
- Create a non-monetary benefit plan for a project
- Associate monetary and non-monetary benefit plans of a project

Benefit Plans in Demand Management

- Create a monetary benefit plan for a demand
- Create a non-monetary benefit plan for a demand
- Associate monetary and non-monetary benefit plans of a demand

Benefit Plans in Agile Development 2.0

- Create a monetary benefit plan for an agile development epic
- Create a non-monetary benefit plan for an agile development epic
- Associate monetary and non-monetary benefit plans of an agile development epic

Benefit Plans in Scaled Agile Framework (SAFe)

- Create a monetary benefit plan for an SAFe epic
- Create a non-monetary benefit plan for an SAFe epic
- Associate monetary and non-monetary benefit plans of an SAFe epic

Strategic Spend Tracking for PPM

Strategic Spend Tracking for PPM enables project or demand managers to evaluate the strategic value of organization’s projects and demands. You can identify the purpose and benefits of executing demands and projects and how they contribute to achieving company's strategies and goals.

Strategic Spend Tracking for PPM enables demand and project managers to determine how and where funding is being spent during the execution of a demand or project.

Organizations generally determine and approve investment budgets that represent the funds allocated to achieve their goals. Strategic Spend Tracking for PPM focuses on allocating your investment budget through demands and projects, and tracking the expenditure to achieve your organizational goals.

Each demand and project contributes to achieving one or multiple organizational goals. You can use the Strategic Spend Tracking for PPM to perform the following tasks:

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- Associate multiple strategies and goals with a demand or project.
- Allocate a percentage of the demand or project's total cost and benefits towards achieving one or more strategies and goals.
- Generate strategy and goal allocation breakdowns for a demand or project for the fiscal year.
- View the roll up of strategy and goal breakdowns from different demands and projects in the strategy and goal record.
- Use the Strategic Spend Tracking for PPM dashboard to view how the planned costs, actuals costs, and benefits for projects aligned to the organization's goals and strategies trend over time in order to accurately understand the financial performance of your organization.

Install Strategic Spend Tracking for PPM

Install the Strategic Spend Tracking for PPM application from ServiceNow Store applications. Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Before you begin

Complete the following setup checklist for a smooth installation and configuration.

Setup checklist

Setup tasks	Description
Verify that PPM Standard plugin (com.snc.financial_planning_pmo) is activated.	Navigate to **Subscription Management** > **Subscriptions** in your instance. The list displays the subscriptions that your organization has purchased.

Role required: admin

About this task

Activate the PPM Standard plugin (com.snc.financial_planning_pmo) in your ServiceNow instance before you install Strategic Spend Tracking for PPM. For more information see, Activate PPM Standard (Project Portfolio Management).

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the application using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find an application, you may have to request it from the ServiceNow Store.

   Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.

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5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Related topics

List of plugins (Xanadu)

Components installed with Strategic Spend Tracking for PPM

Several types of components are installed with activation of Strategic Spend Tracking for PPM, including tables and scheduled jobs.

Note:
The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Scheduled jobs installed

Scheduled job	Description
PPM Strategic Spend Tracking - Generate Strategy/Goal Allocation Breakdowns for Projects and Demands	Generates breakdown of strategy and goal allocation for the associated projects and demands.
PPM Strategic Spend Tracking - Update projects and Demands with strategy and goal allocations	Updates strategy and goal allocations for the associated projects and demands.

Tables installed

Table	Description
BO Job Execution Log [sn_ppm_sst_run_log]	Stores information about execution of the scheduled jobs such as time of execution and tasks there were included.
Goal Allocation [sn_ppm_sst_task_goal]	Stores goal allocation details for a project or demand. The details include project or demand number, strategy name, % allocated towards the strategy, budget, planned cost, actual cost, and benefit amount.
Goal Allocation Breakdown [sn_ppm_sst_goal_allocation_breakdown]	Stores goal breakdown details for a project or demand. The details include fiscal year, strategy allocation amount, cost details (planned and actual), and capex and opex amounts (planned and actual).
Strategy Allocation [sn_ppm_sst_task_strategy]	Stores strategy allocation details for a project or demand. The details include project or demand number, strategy name, % allocated towards

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Table	Description
	the strategy, budget, planned cost, actual cost, and benefit amount.
Strategy Allocation Breakdown [sn_ppm_sst_strategy_allocation_breakdown]	Stores strategy breakdown details for a project or demand. The details include fiscal year, strategy allocation amount, cost details (planned and actual), and capex and opex amounts (planned and actual).

Allocate or modify the strategy and goal percentage for a project

Allocate the percentage of a project's total cost, benefit, and budget to help achieve the strategic objectives that the project fulfills. You can also view the breakdown of the project's financial data based on the allocated percentage.

Before you begin

You should have an existing project.

Execute the following scheduled jobs:

- *PPM Strategic Spend Tracking - Update projects and demands with strategy and goal allocations*
- *PPM Strategic Spend Tracking - Generate Strategy/Goal Allocation Breakdowns for Projects and Demands*

Role required: it_project_manager

Procedure

1. Navigate to **Project** > **Projects** > **All**.
2. Select the project to which you want to add or update allocation percentages.
3. In the **Business Case** tab, add or update the strategies and goals with which the project is associated.
   For more information, see the Business Case field descriptions in the Create a project documentation topic.
4. Click **Save**.
   The selected strategies and goals appear in the Strategy Allocations and Goal Allocations related lists.
5. Update strategy and goal allocations.
   a. In the Strategy Allocations related list, click the **% Allocation** field and enter the percentage that this project contributes towards the selected organizational strategy.
   b. In the Goal Allocations related list, click the **% Allocation** field and enter the percentage that this project contributes towards the selected organizational goal.

   Note:
   The sum of strategy or goal allocations for a project must not exceed 100%.
6. Click the **Recalculate Strategy and Goal Allocation** related link to update cost field values in the allocation tabs.
7. Click **Update**.

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8. **Optional:** In the Strategy or Goal Allocations related list, click the preview icon (), and then click **Open Record** to view the breakdown of the strategy or goal allocation.
9. **Optional:** View the trends for planned costs, actual costs, and benefits over time using the Strategic Spend Tracking for PPM dashboard.

Allocate or modify the strategy and goal percentage for a demand

Allocate the percentage of a demand's total cost, benefit, and budget towards achievement of strategic objectives that the demand fulfills. You can also view the breakdown of the demand's financial data based on the allocated percentage.

Before you begin

You should have an existing demand.

Execute the following scheduled jobs:

- *PPM Strategic Spend Tracking - Update projects and demands with strategy and goal allocations*
- *PPM Strategic Spend Tracking - Generate Strategy/Goal Allocation Breakdowns for Projects and Demands*

Role required: it_demand_manager

Procedure

1. Navigate to **Demand** > **Demands** > **All**.
2. Select the demand to which you want to add or update allocation percentages.
3. In the **Business Case** tab, add or update the strategies and goals with which the demand is associated.
   For more information, see the Business Case field descriptions in the Demand form documentation topic.
4. Click **Save**.x
   The selected strategies and goals appear in the Strategy Allocations and Goal Allocations related lists.
5. Update strategy and goal allocations.
   a. In the Strategy Allocations related list, click the **% Allocation** field and enter the percentage that this demand contributes towards the selected organizational strategy.
   b. In the Goal Allocations related list, click the **% Allocation** field and enter the percentage that this demand contributes towards the selected organizational goal.

   Note:
   The sum of strategy or goal allocations for a demand must not exceed 100%.
6. Click the **Recalculate Strategy and Goal Allocation** related link to update cost field values in the allocation tabs.
7. Click **Update**.
8. **Optional:** In the Strategy or Goal Allocations related list, click the preview icon (), and then click **Open Record** to view the breakdown of the strategy or goal allocation.
9. **Optional:** View the trends for planned costs, actual costs, and benefits over time using the Strategic Spend Tracking for PPM dashboard.

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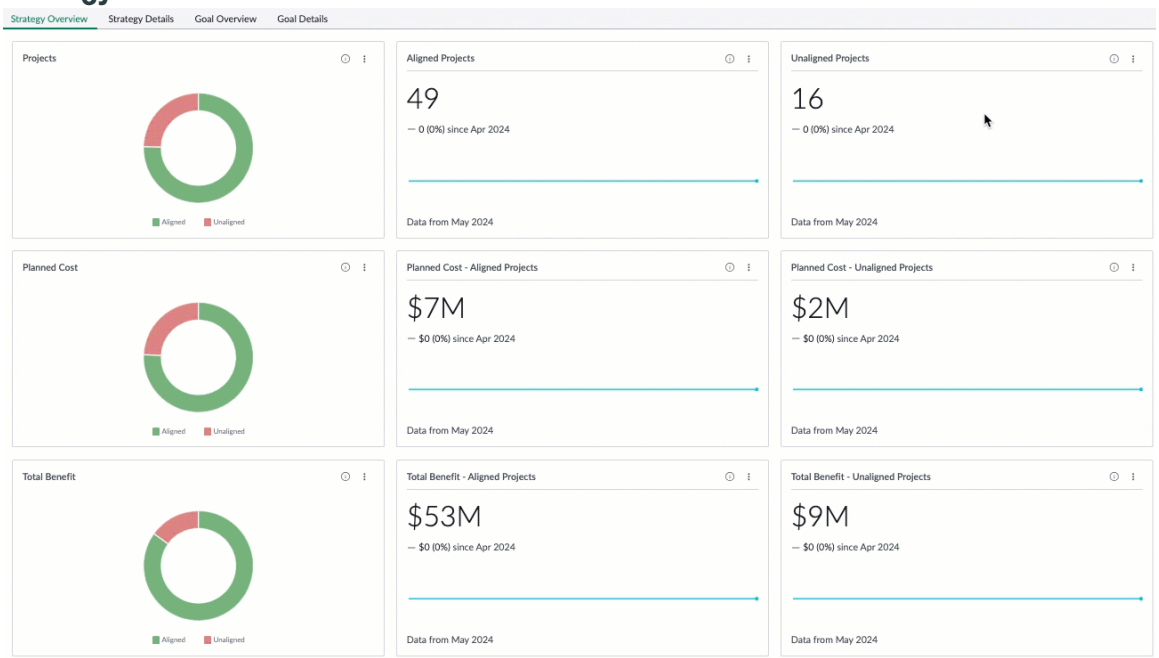
Strategic Spend Tracking for PPM dashboard

The Strategic Spend Tracking for PPM dashboard provides comprehensive visualization to the business planners to help them understand how the planned costs, actual costs, and benefits for projects aligned to the organization's goals and strategies trend over time. It helps you to accurately understand the financial performance of your organization.

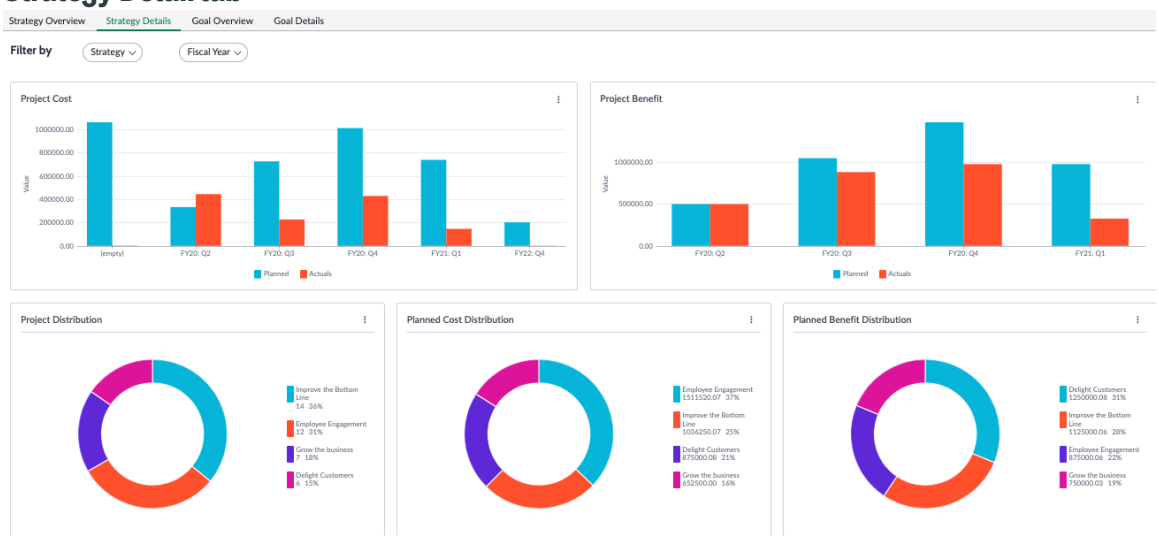
Note:
Starting with version 1.1.0, the Strategic Spend Tracking for PPM dashboard is available in the Next experience UI Framework which can be accessed by navigating to **All** > **Strategic Spend Tracking for PPM** > **Analytics**.

You can analyze the total expenses, and drill down to what is contributing to the cost, and which departments and business units are spending.

Strategy Overview tab

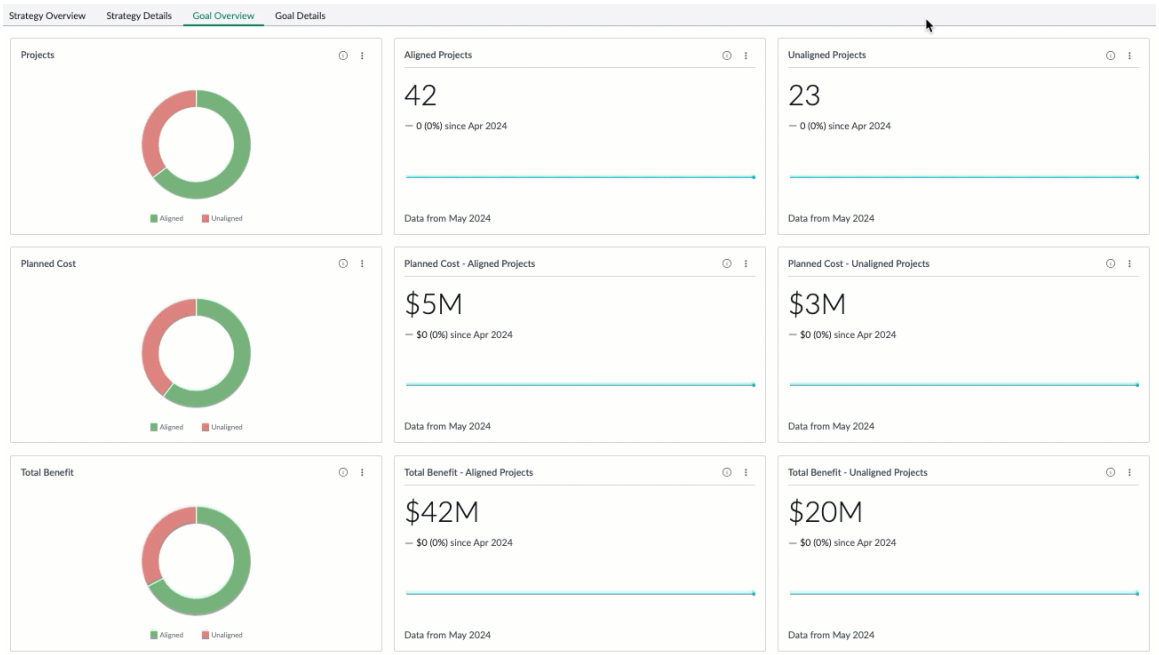


Strategy Detail tab

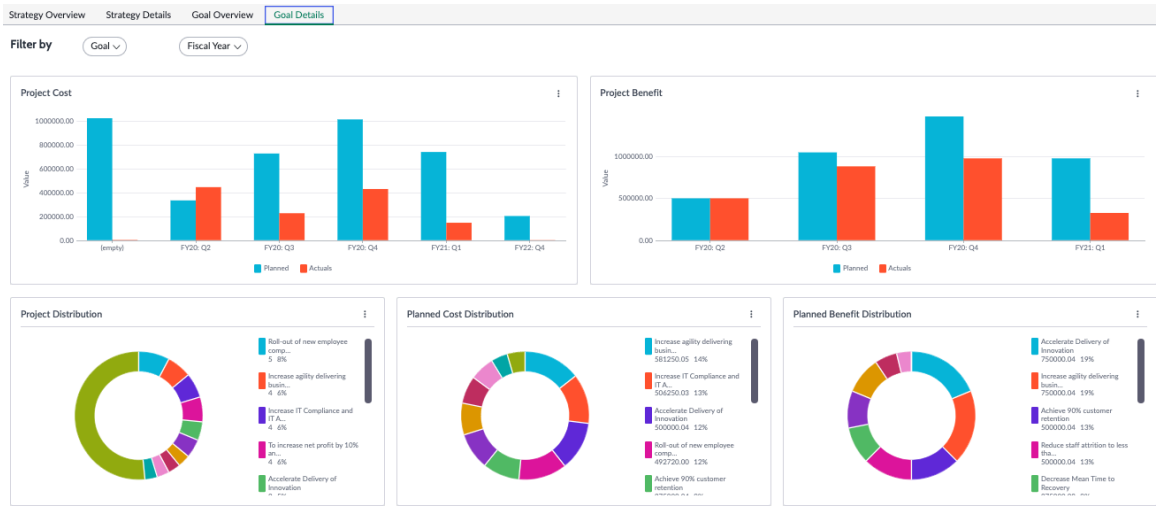


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Goal Overview tab



Goal Detail tab



End user and roles

End user and goal	Required role
Business Planner: Needs visibility into strategies and goals for projects and demands in the organization.	business_planner

Indicators

The dashboard contains the following indicators for strategies:

Projects

Comparison of aligned and unaligned projects for strategies.

Aligned Projects

Count of the projects aligned to strategies.

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Unaligned Projects

Count of the projects not aligned to strategies.

Planned Cost

Comparison of aligned and unaligned planned cost for strategies.

Planned Cost - Aligned Projects

Total planned cost for all projects aligned to strategies.

Planned Cost - Unaligned Projects

Total planned cost for all projects not aligned to strategies.

Total Benefit

Comparison of aligned and unaligned benefit amount for strategies.

Total Benefit - Aligned Projects

Total benefit amount for all projects aligned to strategies.

Total Benefit - Unaligned Projects

Total benefit amount for all projects not aligned to strategies.

Actuals

Comparison of aligned and unaligned actual cost for strategies.

Actuals - Aligned Projects

Total actual cost for all projects aligned to strategies.

Actuals - Unaligned Projects

Total actual cost for all projects not aligned to strategies.

The dashboard contains the following indicators for goals:

Projects

Comparison of aligned and unaligned projects for goals.

Aligned Projects

Count of the projects aligned to goals.

Unaligned Projects

Count of the projects not aligned to goals.

Planned Cost

Comparison of aligned and unaligned planned cost for goals.

Planned Cost - Aligned Projects

Total planned cost for all projects aligned to goals.

Planned Cost - Unaligned Projects

Total planned cost for all projects not aligned to goals.

Total Benefit

Comparison of aligned and unaligned benefit amount for goals.

Total Benefit - Aligned Projects

Total benefit amount for all projects aligned to goals.

Total Benefit - Unaligned Projects

Total benefit amount for all projects not aligned to goals.

Actuals

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Comparison of aligned and unaligned actual cost for goals.

Actuals - Aligned Projects

Total actual cost for all projects aligned to goals.

Actuals - Unaligned Projects

Total actual cost for all projects not aligned to goals.

Breakdowns

The dashboard includes the following breakdowns:

- Strategy
- Goal
- Project Cost
- Project Benefit
- Actuals

Data visualizations

The dashboard includes the following visualizations for strategies:

Title	Type	Description
Project Cost	 Bar chart	Comparison of total planned and actual costs for all projects grouped by fiscal period for strategies.
Project Benefit	 Bar chart	Comparison of total planned and actual benefits for all projects grouped by fiscal period for strategies.
Project Distribution	 Pie chart	Breakdown of the distribution of projects by strategy.
Planned Cost Distribution	 Pie chart	Breakdown of the distribution of planned cost of projects by strategy.
Planned Benefit Distribution	 Pie chart	Breakdown of the distribution of planned benefit of projects by strategy.

The dashboard includes the following visualizations for goals:

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Title	Type	Description
Project Cost	Bar chart 	Comparison of total planned and actual costs for all projects grouped by fiscal period for goals.
Project Benefit	Bar chart 	Comparison of total planned and actual benefits for all projects grouped by fiscal period for goals.
Project Distribution	Pie chart 	Breakdown of the distribution of projects by goals.
Planned Cost Distribution	Pie chart 	Breakdown of the distribution of planned cost of projects by goals.
Planned Benefit Distribution	Pie chart 	Breakdown of the distribution of planned benefit of projects by goals.

Project Portfolio Management Platform Analytics Solutions

Platform Analytics Solutions contain preconfigured dashboards. These dashboards contain actionable data visualizations that help you improve your business processes and practices.

Platform Analytics data visualizations use Performance Analytics indicator data to show you data over time, helping you analyze your business processes and identify areas of improvement. With Platform Analytics Solutions, you can get value from Performance Analytics for your application with minimal setup. You can always create your own objects as well.

Important:
Set up and test Platform Analytics Solutions on a non-production instance before enabling them in production.

To enable the solution for Project Portfolio Management, log in as an admin and navigate to **Performance Analytics** > **Guided Setup**. Click **Get Started**, then scroll to the section for PPM Standard Dashboards. The guided setup takes you through the entire setup and configuration process.

Alternatively, activate the Performance Analytics – Content Pack – PPM Standard plugin (com.snc.pa.pmo_dashboards).

Activation of com.snc.pa.pmo_dashboards plugin also activates the following plugins:

- PPM Standard (com.snc.financial_planning_pmo)
- Performance Analytics – Content Pack – Project Portfolio Suite Dashboards (com.snc.pps_dashboards)

Access the PMO dashboard using either of the following navigation links:

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- **Project** > **Portfolios** > **Portfolio Dashboard**.
- **Project** > **Programs** > **Program Dashboard**.
- **Self-Service** > **Dashboards**. Search for **PMO Dashboard** using the search field.
- **Time Sheets** > **Time Sheet Portal** > **Time Sheet Dashboard**.

The dashboard displays the data based on the navigation link used to open it.

Domain separation and 'Run As' user

In some solutions, System Administrator is the **Run As** user for data collection jobs in the Platform Analytics Solutions. In other solutions, the **Run As** user for data collection jobs is left blank. Verify that the **Run As** user exists on the instance, and that this user has the appropriate level of access. An inappropriate **Run As** user can cause errors or limit the data that is collected. This setting only has an effect if domain separation is enabled.

Older version of this solution

This solution replaces the Project Portfolio Suite (com.snc.pa.ppm) Solution. If you activated an earlier version of the solution and then upgraded your instance, you still have and can still use the earlier solution. You can also activate the newer version without losing data from existing indicators and breakdowns. If you activate the newer version, run a historical data collection job to populate new indicators and breakdowns for the Time Sheet dashboard.

Related topics

Platform Analytics Solutions

Activate your Performance Analytics subscription

PMO dashboard

The PMO dashboard provides comprehensive reports to the portfolio and program managers. The dashboard uses Platform Analytics to provide a trend of historical data as well as regular reports. It gives an overview of your investments, provides a pipeline view of upcoming intake and a calendar view of upcoming dates.

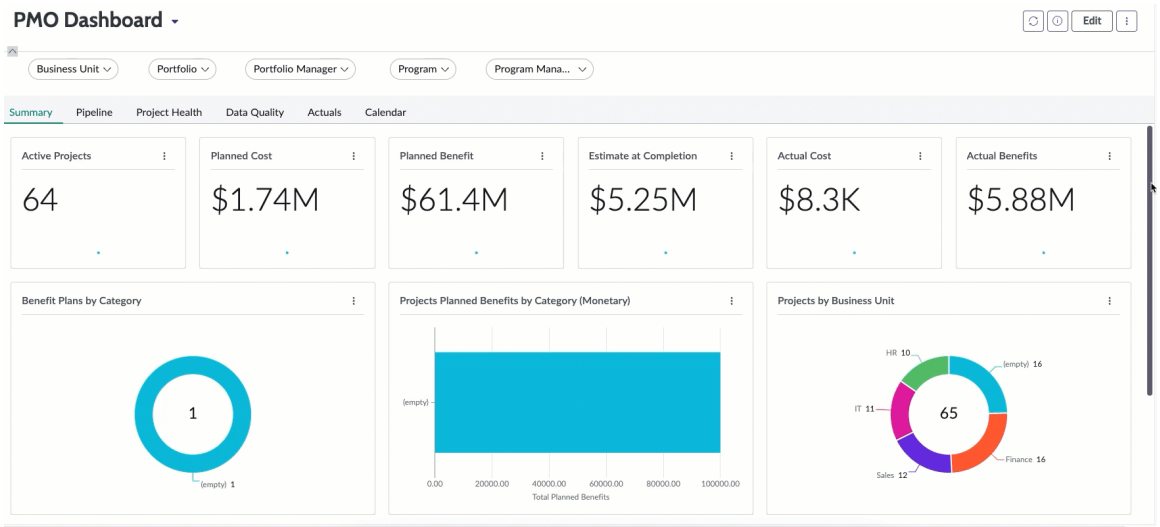
Note:
The PMO dashboard is available in the next experience UI framework which can be accessed through **Analytics Portfolio**. In the next experience, these features are not supported:

- **Pipeline details** pane in the **Pipeline** tab.
- **Highlight based on** list and **View all records** link in the **Calender** tab.

PMO dashboard in Next experience UI

This animation shows all of the data visualizations in the PMO dashboard tab by tab. They are described in the Data Visualizations section of this topic.

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End user and roles

End user and goal	Required role
Portfolio manager: Needs visibility into programs, projects, and demands in their portfolio and actions that should be taken.	it_portfolio_manager
Program manager: Needs visibility into projects and demands in their programs and actions that should be taken.	it_program_manager
Project manager: Has access to the dashboards.	it_project_manager

Indicators

The Summary, Pipeline, and Project Health tabs in the dashboard contain widgets with the following indicators. The data for projects is collected from the [pm_project] table, the data for demands is collected from the [dmn_demand] table, and the data for ideas is collected from the [idea] table.

PPM – Number of Active Projects

Count of active projects. Projects are considered active where actual end date is <after today> or <empty>.

> **Note:**
> If the Actual End Date for a project is in the future but the project is in Closed state, the reports still pick up the project as active.

PPM – Allocated Hours less than Planned Hours

Count of active projects that have resource plans where the allocated hours is less than the planned hours.

PPM – Active Projects in Open, Pending, Work in Progress state

Count of active projects in Open, Pending, or Work in Progress state.

PPM – Number of Active Red Projects

Count of active projects that have an overall red status.

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PPM – Total age of Open Project

Total age of all active projects in days. It is the difference between the planned start date of the active project and the date when the indicator score is collected. The indicator is used to calculate the average age of open projects.

PPM – Planned Cost

Total planned cost for all the active projects.

PPM – Actual Cost

Total actual cost for all the active projects.

PPM – Number of Active Projects with negative ROI

Count of active projects with a negative Return on Investment.

PPM – Estimate at Completion

Total estimated cost at completion for all active projects.

PPM – Number of Projects with High Risks

Count of active projects that have a Risk in Pending state and Probability as Absolute or High.

PPM – Number of Projects with Critical Issues

Count of active projects that have an Issue with state Open or Work in Progress and priority as Critical.

PPM – Number of Projects with Missed Milestones

Count of active projects that have a milestone with planned end date due before today.

PPM – Number of Active Overdue Projects

Count of active projects that have **Planned end date** before today.

PPM – Unallocated Resources

Count of projects in state Work in Progress that have resource plans in Planning, Requested, or Confirmed state.

PPM – Allocated Hours less than Actual Hours

Count of active projects that have resource plans where the actual hours is greater than the allocated hours.

PPM – Planned Benefits

Total planned benefit for all active projects.

PPM – Actual Benefits

Total actual benefit for all active projects.

PPM – Number of Projects with critical Change Requests

Count of active projects that have a Project Change Request with state as Open and priority as Critical.

PPM – Number of Total Demands this Month

Count of demands in the given month with state other than Draft.

PPM – Number of Demands with Projects this Month

Count of demands that are converted to projects in the given month.

PPM – Open Demands Submitted, Screening, Qualified or Approved

Count of demands in Submitted, Screening, Qualified, or Approved state.

PPM – Total Age of Open Demand in Submitted, Screening, Qualified, Approved state

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Total age (in days) of active demands in Submitted, Screening, Qualified, or Approved state. It is the difference between the creation date of the demand and the date when the indicator score is collected. The indicator is used to calculate the average age of open demands.

PPM – Total Age of Demand to Project this Month

Total age (in days) of all demands that are converted to projects in the given month. It is sum of the difference between the creation date of demands and the creation date of corresponding projects. The indicator is used to calculate the average age of Demand to Project.

PPM – Number of Open Ideas

Count of ideas in Submitted state and no Demand associated.

PPM – Total Age of Open Idea

Total number of days an idea is in state Submitted before conversion to demand.

PPM – Number of Total Ideas this Month

Count of ideas other than Draft state and created in the given month.

PPM – Number of Ideas with Demands this Month

Count of ideas converted to demands in the given month.

The dashboard also uses the following formula indicators. The formula indicators are based on few of the preceding indicators.

PPM – Average age open project

Average number of days a project is in state Pending, Open, or Work in Progress. The indicator is calculated using the **PPM – Total Age of Open Project** and **PPM – Number of Active Projects** indicators.

PPM – Percentage of Ideas to Demands last 12 months

Percentage of ideas converted to demands in last 12 months.

PPM – Average age Demand to Project last 12 months

Average number of days before a demand has been converted to a project.

PPM – Percentage of Demand to Project last 12 months

Percentage of demands converted to projects in last 12 months.

PPM – Average age open demand

Average number of days a demand is in state Submitted, Screen, Qualified, or Approved and has not been converted to project.

PPM – Average age open idea

Average number of days an idea is in state Submitted before conversion to demand.

PPM – Portfolio Health

Percentage of portfolio health based on active projects in overall red status, active projects that are overdue, and active projects with critical issues.

Breakdowns

- Business Unit
- Demand Category
- Demand Manager
- Demand State

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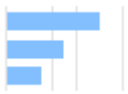
- Demand Type
- Department
- Impact
- Portfolio
- Portfolio Manager
- Priority
- Program
- Program Manager
- T-Shirt Size
- Execution Type
- Investment Class
- Investment Type
- Project Manager
- Project Phase
- Project State
- Project Status
- Overall Health

Data visualizations

The dashboard includes the following visualizations:

Title	Type	Description
Benefit Plans by Category	Pie chart 	Breakdown of the number of benefit plans in each category for active projects.
Projects Planned Benefits by Category (Monetary)	Horizontal bar chart 	Total planned financial benefits in each category for active projects.
Projects by Business Unit	Pie chart 	Breakdown of the number of active projects in each business unit.
Projects by Investment Type	Pie chart 	Breakdown of the number of active projects grouped by investment type.
Projects by Investment Class	Pie chart 	Breakdown of the number of active projects grouped by investment class.

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Title	Type	Description
Projects by Priority	Horizontal bar chart 	Breakdown of the number of active projects grouped by priority.
Hours by Project Time Category	Line chart 	Trend of total hours reported in time cards for each Project Time Category. The trend is displayed from the beginning of last quarter until the end of next quarter.
Active Demands	Single score 	Number of demands in Submitted, Screened, Qualified, and Approved state with no project associated.
Demands – No Manager	Single score 	Number of active demands with no associated demand manager.
Demands – No Business Case	Single score 	Number of active demands with no business case.
Demands – No Planned Cost	Single score 	Number of active demands with zero total planned cost.
Demands – No Start Date	Single score 	Number of active demands with no start date.
Demands – No Investment Class	Single score 	Number of active demands with no associated investment class.
Demands – No Budget Cost	Single score 	Number of active demands with zero capital and zero operating budget.
Demands – No Due Date	Single score 	Number of active demands with no due date.
Demands – No Investment Type	Single score 	Number of active demands with no associated investment type.

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Title	Type	Description
Demands – No Financial Benefits	 Single score	Number of active demands with no or zero financial benefit.
Demands – No Portfolio	 Single score	Number of active demands with no associated portfolio.
Demands – No Program	 Single score	Number of active demands with no associated program.
Demands – No ROI	 Single score	Number of active demands with no Return on Investment.
Active Projects	 Single score	Number of projects with actual end date <after today> or <empty>.
Projects – No Manager	 Single score	Number of active projects with no associated project manager.
Projects – No Business Case	 Single score	Number of active projects with no business case.
Projects – No Planned Cost	 Single score	Number of active projects with zero total planned cost.
Projects – No Task	 Single score	Number of active projects with no associated project tasks.
Projects – No Investment Class	 Single score	Number of active projects with no associated investment class.
Projects – No Budget Cost	 Single score	Number of active projects with zero budget cost.
Projects – No Description	 Single score	Number of active projects that have no description.

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Title	Type	Description
Projects – No Investment Type	Single score 	Number of active projects with no associated investment type.
Projects – No Planned Benefit	Single score 	Number of active projects with zero planned benefit.
Projects – No Portfolio	Single score 	Number of active projects with no associated portfolio.
Projects – No Program	Single score 	Number of active projects with no associated program.
Projects – No ROI	Single score 	Number of active projects with no planned Return on Investment.
Planned vs Budget vs Actual Cost	Bar chart 	Comparison of total planned, budget, and actual costs for active projects grouped by fiscal period.
Allocated vs Actual Hours	Step line chart 	Monthly trends of total allocated and actual hours for resource plans associated with active projects.
Monetary Planned vs Actual Benefits	Bar chart 	Comparison of total planned and actual financial benefits for active projects grouped by fiscal period.
Non-monetary Planned vs Actual Benefits	Bar chart 	Comparison of total planned and actual non-financial benefits for active projects grouped by fiscal period.
Monetary Planned vs Actual Benefits by Category	Bar chart 	Comparison of total planned and actual financial benefits in each benefit plan category for active projects.
Project Completion Calendar	Calendar 	Calender view of planned end dates of projects, project tasks, and milestones.

Analytics Time sheet

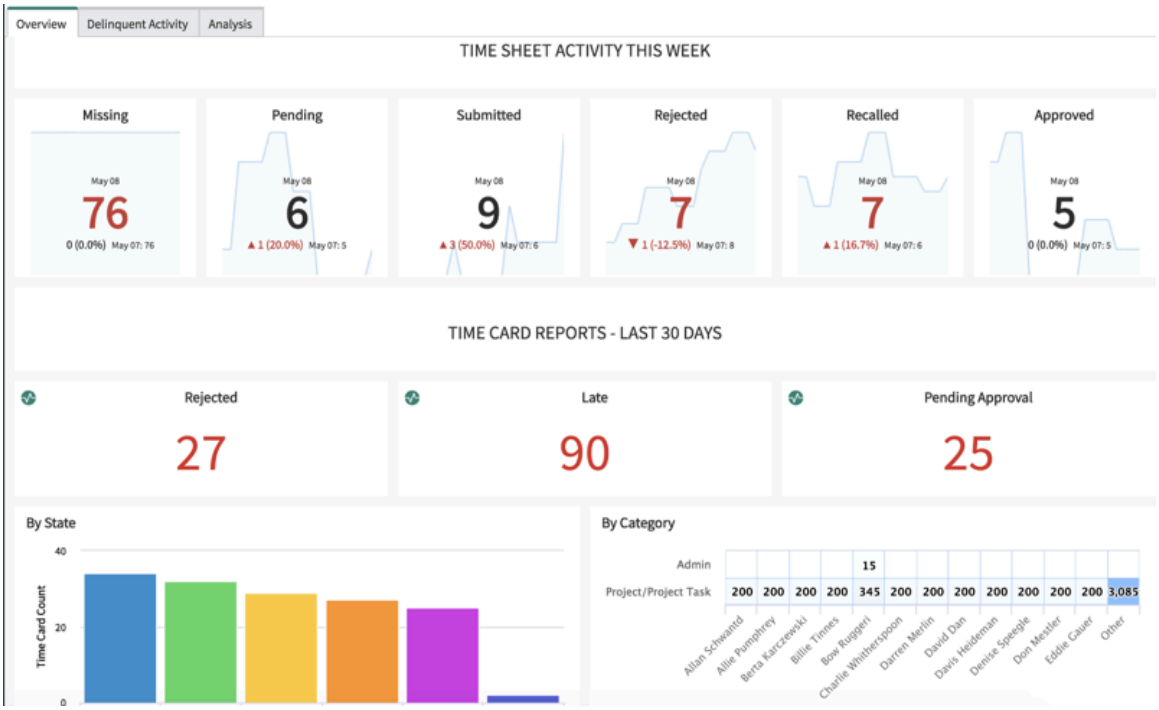
The Analytics Time sheet provides comprehensive time sheet activities and reports to the time card approvers and time card users. The dashboard uses Performance Analytics to provide a

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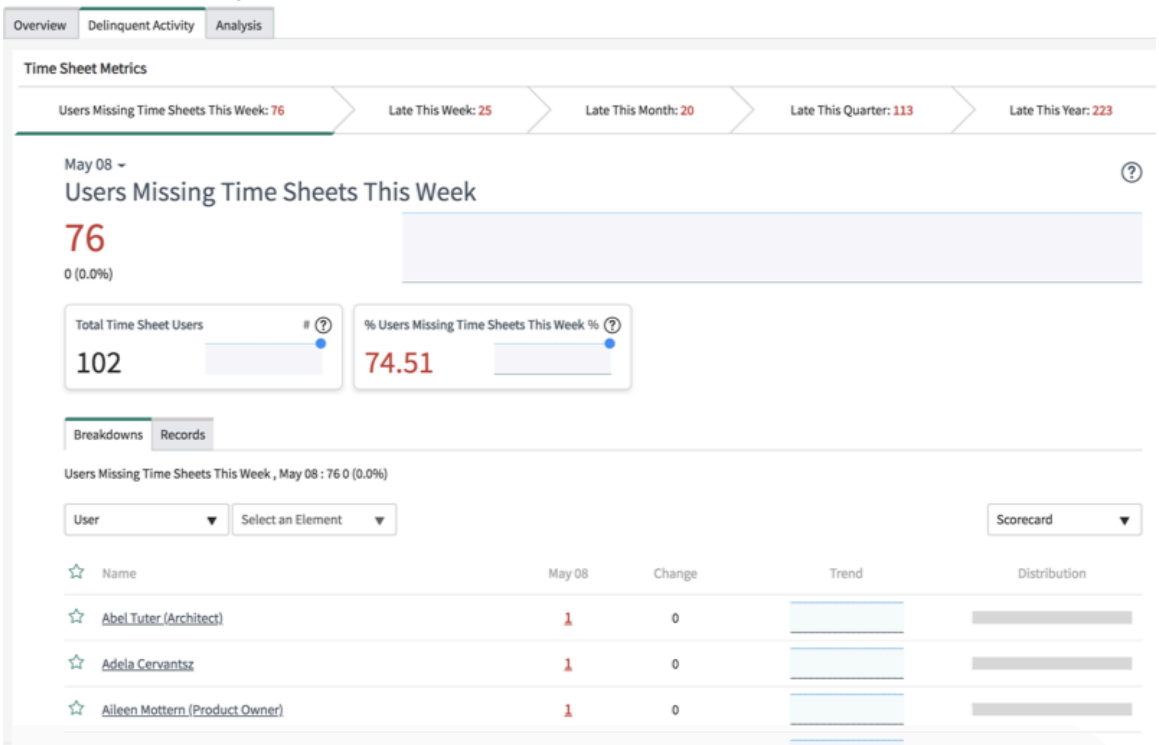
trend of historical data and regular reports. It gives an overview of the time sheet activities of resources, time sheet approval and rejection rate, over-allocated and under-allocated resource counts.

Important:
Starting with Xanadu release, **Time Sheet Dashboard** is renamed to **Analytics Time sheet** for new customers.

Overview tab

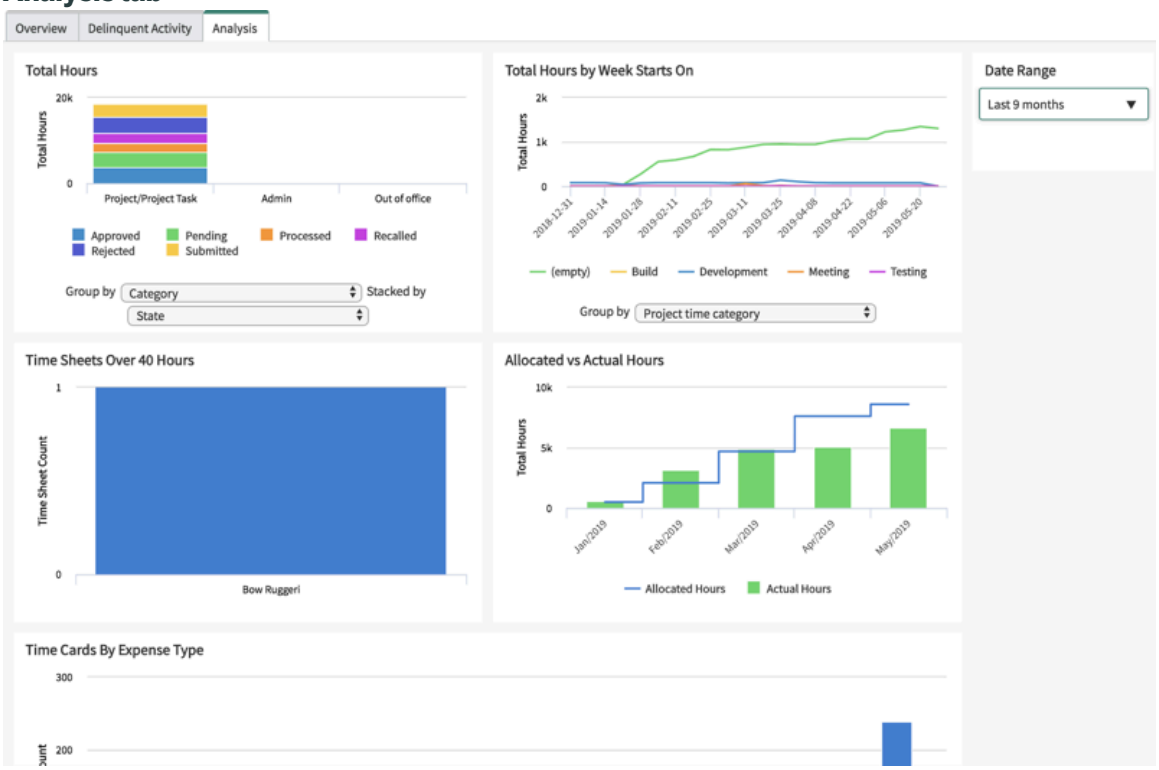


Delinquent Activity tab



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Analysis tab



End user and roles

End user and goal	Required role
Portfolio manager: Needs visibility into time sheet activities of resources and actions that should be taken.	it_portfolio_manager
Program manager: Needs visibility into time sheet activities of resources and actions that should be taken.	it_program_manager
Project manager: Has access to the dashboards.	it_project_manager
Time card approver: Needs visibility into time sheet activities of resources and actions that should be taken.	timecard_approver
Business stakeholder for PPM: Needs visibility into time sheet activities of resources and actions that should be taken.	sn_ppm_read

Indicators

The Overview, Delinquent Activity, and Analysis tabs in the dashboard contain widgets with the following indicators. The data for time sheets and time cards is collected from the [time_sheet] table and the data for users is collected from the [users] table.

PPM – Active Time Sheet Users

Count of active users with the timecard_user role.

PPM – % Late This Year

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Percentage of time sheets late this year.

PPM – % Late This Week

Percentage of time sheets late this week.

PPM – % Late This Quarter

Percentage of time sheets late this quarter.

PPM – % Late This Month

Percentage of time sheets late this month.

PPM – Late Time Sheets This Month

Count of late time sheets this month. The indicator includes time sheets of the current month until the past week that are not in the Approved or Processed state.

PPM – Late Time Sheets This Quarter

Count of late time sheets this quarter. The indicator includes time sheets of the current quarter until the past week that are not in the Approved or Processed state.

PPM – Late Time Sheets This Week

Count of late time sheets this week. The indicator includes time sheet of the past week that are not in the Approved or Processed state.

PPM – Late Time Sheets This Year

Count of late time sheets this year. The indicator includes time sheets of the current year until the past week that are not in the Approved or Processed state.

PPM – Total Time Sheets Last Week

Total number of time sheets for the past week.

PPM – Total Time Sheets This Month

Total number of time sheets for the weeks in the current month.

PPM – Total Time Sheets This Quarter

Total number of time sheets for the weeks in the current quarter.

PPM – Total Time Sheets This Year

Total number of time sheets for the weeks in the current year.

PPM – Time Sheets Approved This Week

Count of time sheets approved this week. The indicator includes time sheets in the Approved or Processed state.

PPM – Time Sheets Missing This Week

Count of users with the timecard_user role who did not submit time sheet for the current week.

PPM – Time Sheets Pending This Week

Count of time sheets pending this week. The indicator includes time sheets for the current week in the Pending state.

PPM – Time Sheets Recalled This Week

Count of time sheets recalled this week. The indicator includes time sheets for the current week in the Recalled state.

PPM – Time Sheets Rejected This Week

Count of time sheets rejected this week. The indicator includes time sheets for the current week in the Rejected state.

PPM – Time Sheets Submitted This Week

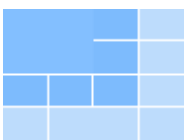
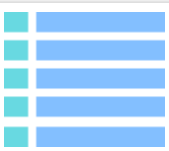
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Count of time sheets submitted this week. The indicator includes time sheets for the current week in the Submitted state.

Breakdowns

- User
- Manager
- Department
- Cost Center
- Portfolio
- Program
- Project

Data visualizations

Title	Type	Description
Rejected	 Single score	Number of time cards that are in the Rejected state for the last 30 days.
Late	 Single score	Number of time cards that were submitted late in the last 30 days.
Pending Approvals	 Single score	Number of time cards that have approval pending in the last 30 days.
By State	 Bar chart	Number of time cards in the last 30 days, grouped by their state.
By Category	 Heat map	Breakdown of time spent (hours) by a resource across different project time categories in the last 30 days.
By Resource	 List	The list of time cards submitted by a resource in 30 days.
Total Hours	 Bar chart	Total time (hours) spent on by different categories.

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Title	Type	Description
Total Hours by Week Starts On	Time series line 	Weekly trend of the total time (hours) spent on different categories over a period of time.
Time Sheets Over 40 Hours	Bar chart 	Count of time sheets over 40 hours indicating over-allocated resources. This report does not refresh when you select portfolio, program, or project.
Allocated vs Actual Hours	Time series step 	Monthly trend comparing the total allocated hours versus actual hours for all time card users.
Time Cards By Expense Type	Bar chart 	Time cards grouped by expense types: Capital Expense (Capex) and Operating Expense (Opex).

Project Portfolio Management reference

Reference topics provide information about domain separation, quick start tests, business stakeholder role access, and others related to Project Portfolio Management.

Components installed with Project Portfolio Management (PPM) Standard

Several components are installed with the activation of the PPM Standard plugin.

Demo data is available with PPM Standard. The demo data provides sample projects, demands, programs, portfolios, expense lines. The demo data also provides sample cost plans and budget plans for the sample projects and demands.

Plugins installed with PPM Standard (Project Portfolio Management)

Multiple plugins are installed with activation of PPM Standard plugin, if they are not already active.

PPM Standard plugins

PPM Standard adds the following plugins.

Plugin Name	Description
Project Portfolio Suite [com.snc.project_portfolio_suite]	Activates an integrated set of applications for project portfolio management and IT software development.
Financial Planning [com.snc.financial_planning]	Enables financial analysts to assemble spending data, build cost models, and generate reports to show how funds are being allocated.

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Plugin Name	Description
Rate Model [com.snc.rate_model]	Delivers date-effective hourly rates for a specific set of criteria coming from the project, demand, or time card being processed.
Ideation with PPM [com.snc.ppm_innovation_management]	Enables your organization to collect new ideas, collaborate on ideas, and identify great ideas for implementation. Convert selected ideas to demands, stories, projects, and epics.

Project Portfolio Suite plugins

Project Portfolio Suite adds the following plugins.

Plugin Name	Description
Demand Management [com.snc.demand_management]	Enables capturing the demands and provide tools to screen, assess and prioritize them.
Project Management [com.snc.project_management_v3]	Enables planning, organizing and managing projects and resources in order to setup, execute, and complete a project faster and easier.
Resource Management [com.snc.resource_management]	Enables resource requesters and resource managers to plan, organize, and manage resources for both planned and operational work.

Demand management plugins

Demand management adds the following plugins.

Plugin Name	Description
Process Flow Formatter [com.snc.process_flow_formatter]	Summarize multiple pieces of information about a process and display the stages graphically at the top of a form.
Assessment [com.snc.assessment_core]	Evaluate, score, and rank records from tables in the system. Evaluate results using unique graphical views designed to highlight key performance information.
Timeline Visualization [com.snc.timeline_visualization]	Provide a high-level graphical representation of your strategic and operational activities for your organization such as incidents, problems, changes, and projects.

Project management plugins

Project management adds the following plugins.

Plugin Name	Description
Checklist	Checklists for tasks.

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Plugin Name	Description
[com.glide.ui.checklist]	
Cost Management [com.snc.cost_management]	Enables the definition and tracking of configuration item costs. Uses rate cards with CIs, contracts, and projects.
Process Flow Formatter [com.snc.process_flow_formatter]	Displays the different stages in a linear process flow across the top of a record.
Skills Management [com.snc.skills_management]	Enables an administrator to assign configured competencies, called skills, to groups or individual users.
Timeline Visualization [com.snc.timeline_visualization]	Enables graphical representation of activities over time.
Time card management [com.snc.time_card]	Enables the creation of linear timelines for any activity that is bounded by two dates, such as the actual start and end dates on a project task.

Resource management plugins

Project management adds the following plugins.

Plugin Name	Description
Cost Management [com.snc.cost_management]	Enables the definition and tracking of configuration item costs. Uses rate cards with CIs, contracts, and projects.
Process Flow Formatter [com.snc.process_flow_formatter]	Displays the different stages in a linear process flow across the top of a record.

Tables installed with PPM Standard (Project Portfolio Management)

Tables are added with activation of PPM Standard plugin.

PPM Standard tables

PPM Standard adds the following tables.

Table	Description
Cost Plan [cost_plan]	Cost plan for the resources required for the project.
Cost Plan Breakdown [cost_plan_breakdown]	Cost breakdown of resources based on project, program, or portfolio. These records are rollups of all costs. Project task cost plans are not rolled up to the project.

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Table	Description
Cost Type Definition [resource_type_definition]	Definitions of cost types, which specify either an operating expense or capital expense, and can link accounts in the General Ledger [itfm_gl_accounts] table. The General Ledger table is installed with the Financial Management application.
Project Funding [project_funding]	Project or demand target and budget expense values for both capital and operating expenses. The records in this table are for a single fiscal year.
Benefit Plan [benefit_plan]	Benefit plan for the potential benefits that the project or demand can accrue.
Benefit Breakdown [benefit_plan_breakdown]	Benefit breakdown for the project or demand. These records are rollups of all benefits.
Budget Reference Rates [itfm_fx_rate]	The exchange rates that budgets use.

Project Portfolio Suite tables

Project Portfolio Suite adds the following tables.

Table	Description
Project Stakeholder [pm_m2m_project_stakeholder]	Stores all stakeholders who are associated with one or more projects.
Project Time Card Exception [project_timecard_exception]	Stores time card information such as Week starts on, User, Project, and State of the time cards.
Project Time Category [project_time_category]	Stores project sub-categories created for time cards.
Time Sheet Exception [time_sheet_exception]	Stores time sheet information such as Week starts on, User, and State of the time sheets.

Demand management tables

Demand management adds the following tables.

Table	Description
Demand [dmn_demand]	Stores all demands.
Decision	Stores all decisions.

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Table	Description
[dmn_decision]	
Stakeholder Register [dmn_stakeholder_register]	Stores all stakeholders.
Requirement [dmn_requirement]	Stores all requirements.
Demand Stakeholder [dmn_m2m_demand_stakeholder]	Stores all stakeholders who are associated with one or more demands.
Demand Stage Config [dmn_stage_config]	Stores the images displayed in the demand stage pop-up window.
Idea [idea]	Stores all ideas.
Demand Task [dmn_demand_task]	Stores tasks associated with demands. Extends the planned_task table to support demand-level task tracking and resource allocation.

Project management tables

Project management adds the following tables.

Table	Description
Goal [goal]	Project goals.
Issue [issue]	Project issues.
Personalize Workbench [workbench_config_user]	Configuration settings for each user that utilizes the workbench.
Portfolio [pm_portfolio]	Portfolios.
Portfolio Project [pm_portfolio_project]	Portfolio projects.
Portfolio Project Goal [pm_portfolio_goal]	Portfolio project goals.

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Table	Description
Portfolio Project Issue [pm_portfolio_issue]	Portfolio project issues.
Portfolio Project Relationships [pm_m2m_portfolio_project]	All relationships between a portfolio and each project in the portfolio.
Portfolio Project Risk [pm_portfolio_risk]	Portfolio project risks.
Project [pm_project]	All projects.
Project Task [pm_project_task]	All tasks used in projects.
Project Task Link [pm_project_task_link]	All records for linked changes (installed with the v3 plugin).
Project Template [project_template]	Project templates.
Project Template Configuration [project_template_config]	Configuration settings for project templates.
Project Template Task [project_template_task]	Tasks in project templates.
Risk [risk]	Project risks.
Project Change Request [project_change_request]	Project change requests.
Status Report [project_status]	Project status reports.
Teamspace [pm_app_config]	All teamspaces, which refer to the tables that are created for the teamspaces. See Installed with teamspaces for a list of teamspace tables.
Planned task Relationship [planned_task_rel_planned_task]	Predecessor and successor tasks in a dependent relationship, including task lag values.
Baseline	All baselines.

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Table	Description
[planned_task_baseline]	
Baseline Item [planned_task_baseline_item]	All tasks that are part of baselines.
Task Relationship [task_rel_task]	Predecessor and successor tasks in a dependent relationship.
Planned task Recalculation Exclusions [planned_task_recalculation_exclusions]	Defines tables that are excluded from recalculation (start and end dates). For example, the table is used for all sub tables under planned_task to exclude tables from being recalculated. This table allows you to configure the tables from which you would not like to perform the recalculation from.

Program management tables

Program management adds the following tables.

Table	Description
Program Task [pm_program_task]	All the tasks in program
Program [pm_program]	All programs

Resource management tables

Resource management adds the following tables.

Table	Description
Group Resource Roles group_has_resource_role	Stores the resource roles for the groups with pps_resource_role. The roles in this table are populated from the User Resource Role [user_has_resource_role] table of the users that are part of a group. The table is read-only.
Requested Allocation Daily [requested_allocation_daily]	Stores day-level breakdown for requested allocations. The table is read-only.
Resource Allocation [resource_allocation]	Allocations for resources.

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Table	Description
Resource Allocation Daily [resource_allocation_daily]	On a day-to-day basis, stores the events that are created through a resource plan. Also stores: • User created calendar events as records. • Actual hours that a user has spent on a task, project, or any other type of activity, such as meeting or admin work.
Resource Aggregate Daily [resource_aggregate_daily]	On a day-to-day basis, stores aggregated values, such as capacity, allocated hours in a project, confirmed hours in a project, non-project time, actual hours, and availability of every user. This table is not enabled by default. To generate daily aggregates and store them in this table, create the *com.snc.resource_management.generate_daily_aggregates* property and set the value to true.
Resource Aggregate Weekly [resource_aggregate_weekly]	On a weekly basis, stores aggregated values, such as capacity, allocated hours in a project, confirmed hours in a project, non-project time, actual hours, and availability of every user. The values in the table are asynchronously updated on every insert/update/delete to the Resource Allocation Daily [resource_allocation_daily] table.
Resource Aggregate Monthly [resource_aggregate_monthly]	On a monthly basis, stores aggregated values, such as capacity, allocated hours in a project, confirmed hours in a project, non-project time, actual hours, and availability of every user. The values in the table are asynchronously updated on every insert/update/delete to the Resource Allocation Daily [resource_allocation_daily] table.
Requested Allocation [requested_allocation]	Allocations for resource plans.
Resource Event [resource_event]	Stores events that are created for a user.
Resource Event Color [resource_event_color]	The colors that the application displays for each event type.
Resource Plan [resource_plan]	All resource plans. These columns were added for Helsinki: `top_task`, `program`, `portfolio`.
Resource Plan Logs [resource_plan_logs]	Stores errors and warning that might occur during the resource allocation for a resource plan.
Resource Report [resource_report]	Resource reports that you can generate and save.
Resource Report Chart [resource_report_chart]	This table is not used.
Resource Report Daily	Daily resource reports that you can generate and save.

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Table	Description
[resource_report_daily]	
Resource Report Export [resource_report_export]	Saves JPG and PNG exports of resource management reports.
Resource Report Monthly [resource_report_monthly]	Monthly resource reports that you can generate and save.
Resource Role [resource_role]	Stores project specific roles.
User Resource Role [user_has_resource_role]	Stores the resource roles for a user.
User Calendar Event [user_calendar_event]	Stores events that are created in the calendar of a user.
User Schedule [user_has_schedule]	Stores the schedule for a user.

Innovation management tables

Innovation Management adds the following tables.

Table	Description
Idea [im_idea_core]	Default table which stores all the information related to the Idea portal. Extends the Task table.
Idea Category [im_category]	Stores the list of static idea categories.
Idea Category Configuration [im_category_config]	Stores idea category definition information such as the table to use, field name, and hierarchy of the idea category. Also stores mapping information between idea categories table and the Idea module.
Idea Categories [im_m2m_idea_category]	Stores mapping information between idea categories and ideas.
Idea Module [im_module]	Configuration for the Idea portal such as module name, module id, and idea table to use. Create a separate table for each Idea module.

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Time card management tables

Time card management adds the following tables.

Table	Description
Time Card [time_card]	Stores time logged by the user against a category such as a task, meeting, or training.
Time Sheet [time_sheet]	Groups all time cards for the user for a week.
Time Sheet Policy time_sheet_policy	Stores all time sheet policies.
Time Card Daily [time_card_daily]	Stores the time logged in a time card on daily basis.

Rate model tables

Rate model add the following tables.

Table	Description
Rate Model [rate_model]	Stores rate model definition.
Rate Model Entity [rate_model_entity]	List of entities from which the attributes can be selected.
Rate Model Entity Attribute [rate_model_entity_attribute]	List of attributes in the entities.
Rate Model Line [rate_model_line]	Stores rate line values.
Rate Model Line Attribute [rate_model_line_attribute]	Stores rate line attributes that are added from the entities.
Rate Line Import Set [imp_rate_model_line]	Stores import sets that you imported into the instance.

Roles installed with PPM Standard (Project Portfolio Management)

Roles are added with activation of PPM Standard plugin.

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Project Portfolio Suite roles

Project Portfolio Suite adds the following roles.

Role title [name]	Description	Contains roles
Portfolio manager [it_portfolio_manager]	Has access to all portfolios. Has the same access permissions as a project user and a demand user. Also has budget owner role is added as part of Financial Management.	• it_demand_user • it_project_manager • it_project_user • portfolio_manager • it_demand_manager • it_project_portfolio_user
PPS admin [it_pps_admin]	Can view and modify the preferences, configurations, and settings for projects, demands, programs, portfolios, resources, time cards, agile development, and timeline visualization.	• it_program_manager • it_portfolio_manager • it_project_manager • it_demand_manager • pps_admin • timeline_admin • rate_model_admin

Demand management roles

Demand management adds the following roles.

Role title [name]	Description	Contains roles
Demand manager [it_demand_manager]	Can access all the modules of the Demand Management application.	• it_project_user • resource_user • timeline_user • demand_manager • it_demand_user • rate_model_user
Demand user [it_demand_user]	Can access the Demand and Stakeholders modules of the Demand Management application.	• demand_user • pps_resource

Project management roles

Project management adds the following roles.

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Role title [name]	Description	Contains roles
Portfolio user [it_project_portfolio_user]	User who can view IT Portfolio Project records.	project_portfolio_user
Project user [it_project_user]	Can only view Project form fields. Can modify additional fields on the Project Task form, such as **Time constraint** and **State**.	• it_project_portfolio_user • project_user
Project manager [it_project_manager]	Has access to all Project Management application features and functionality. This role enables project managers to create and manage projects, tasks, and resource plans. For configuration access to modify application settings and preferences, use the PPS admin [it_pps_admin] role instead.	• resource_user • it_demand_manager • it_project_user • project_manager The project_manager role also contains the timecard_approver role. • timeline_user • rate_model_user

Program management roles

Program management adds the following roles.

Role title [name]	Description	Contains roles
Program manager [it_program_manager]	Program managers have access to all programs.	• resource_user • it_project user • program_manager • it_demand_user

Resource management roles

Resource management adds the following roles.

Role title [name]	Description	Contains roles
Resource manager [resource_manager]	Users with this role can: • Review resource plans, confirm, and allocate resources to tasks. • Create skills and view them in the User Skills list. • Read schedules. • Create a group of type pps_resource.	• resource_user • timecard_approver • skill_admin • rate_model_user

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Role title [name]	Description	Contains roles
	• Add users to or remove them from any groups. • Update group name, group email, parent, description, manager, average daily FTE hours/ hours per person day, and hourly rate.	
Resource user [resource_user]	Users with this role can create resource plans and request resources. Project managers are typically given this role. Resource users cannot make changes to plans in the Confirmed or Allocated state.	None
PPS resource [pps_resource]	Only users with the PPS Resource role are considered for resource planning, and only users or groups with the PPS resource role appear in resource plans.	None

Innovation management roles

Innovation Management adds the following roles:

Role title [name]	Description	Contains roles
Idea admin [idea_admin]	• Creates idea module. • Defines idea categories. • Configures mapping of idea categories with idea module. • Manages ideas and creates tasks such as story, epic, feature, project, or demand from an idea.	idea_manager
Idea manager [idea_manager]	Manages ideas and creates tasks such as project or demand from an idea.	None
Idea manager professional [idea_manager_professional]	Manages ideas and creates tasks such as story, epic, feature, project, or demand from an idea.	None

Time card management roles

Time card management adds the following roles.

Role title [name]	Description	Contains roles
Time card admin [timecard_admin]	Has write access to all time cards.	• timecard_user • timecard_approver
Time card approver	Approves or rejects time cards for time card users.	timecard_user

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Role title [name]	Description	Contains roles
[timecard_approver]		
Time card user [timecard_user]	Creates time cards for self.	None

Rate model roles

Role title [name]	Description	Contains roles
Rate model admin [it_rate_model_admin]	Manages rate models and rate lines. Has all privileges within rate model, including configuring attributes, export and import of rate lines, and administration.	• rate_model_user • import_set_loader • import_transformer • import_admin
Rate model user [rate_model_user]	View rate model and rate lines.	None

Business stakeholder role for PPM

For PPM users, the Business Stakeholder (com.snc.business_stakeholder) plugin contains the business stakeholder roles for Enterprise Architecture (formerly APM), ITFM, and PPM. Users with this role can read records of the tables that are used to retrieve data for reports and dashboards and can approve demands and timecards. You can assign this role to any user who is a business stakeholder.

Upgrade information

If you have upgraded, the business stakeholder role for PPM is available only when you activate Read only roles for PPM Standard plugin (com.snc.pmo_read_roles).

If you are a new customer, the Read only roles for PPM Standard plugin (com.snc.pmo_read_roles) is activated on zBoot. However, the business stakeholder role for PPM is available only when you install the PPM Standard plugin.

Demand and Timecard approver roles

The Read only roles for PPM Standard plugin (com.snc.pmo_read_roles) installs the sn_ppm_read role. The sn_ppm_read role provides read-only access to the Portfolio, Program, and Timecard dashboards along with the Resources report to the assigned users. The sn_ppm_read role also contains the timecard_approver and demand_approver roles, which allow the assigned users to approve demands and timecards. Commenting is enabled, when a business stakeholder role is added as collaborator in demands.

PPM tables accessible to users with the business stakeholder role

Users with the business stakeholder role for PPM can access the following tables that store the data to load the widgets in the Portfolio dashboard, Program dashboard, and Time Sheet dashboard, and Resource reports:

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PPM tables

Label	Table name
Action	project_action
Decision	dmn_decision
Demand	dmn_demand
Demand Task	dmn_demand_task
Fiscal period	fiscal_period
Idea	im_idea_core
Issue	issue
Program	pm_program
Project	pm_project
Project Task	pm_project_task
Program Task	pm_program_task
Project Time Card Exception	project_timecard_exception
Requirement	dmn_requirement
Resource Aggregate Daily	resource_aggregate_daily
Resource Aggregate Monthly	resource_aggregate_monthly
Resource Aggregate Weekly	resource_aggregate_weekly
Resource Plan	resource_plan
Risk	risk
Status Report	project_status
Time Card	time_card
Time Sheet	time_sheet
Time Sheet Exception	time_sheet_exception

Domain separation and Project Portfolio Management

Domain separation is supported in Project Portfolio Management. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level - Basic*

- There is business logic to ensure data goes into the proper domain for the application's service provider use cases.
- In the application, the user interface, cache keys, reporting, rollups, aggregations, and so on, all consider domain at run time.
- The owner of the instance needs to be able to set up the application to function normally across multiple tenants.

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Use case: As a service provider when I use chat to respond to a tenant-customer's message, the client must be able to see my response.

How domain separation works in Project Portfolio Management

Project Portfolio Management is domain separation-compliant with the following limitations:

- All PPM entities such as ideas, project, demand, resource plan, and allocations are expected to be in the same domain. A project entity having tasks or resources from multiple domains is not supported.
- A parent entity and all child entities, such as a project record and its project tasks, are expected to be in the same domain.
- When you change the domain of a parent record, for example a project record, the domain of the child records are not changed.
- Only users belonging to the same domain, parent domain, or the top domain have the visibility into PPM entities of a domain.
- All system properties are in the global domain and are not specific to a domain. Planning console settings, however, are still domain-specific.

Related topics

Domain separation for service providers

Quick start tests for Project Portfolio Management

Validate that Project Portfolio Management still works after you make any configuration change such as applying an upgrade or developing an application. Copy and customize these quick start tests to pass when using your instance-specific data.

Project Portfolio Management quick start tests require activating the PPM Standard - ATF Tests plugin (com.snc.financial_planning_pmo.atf).

PMO: Financial Tests for verifying cost rollups and demand to project conversion test suite

Test	Description	Release version
PMO: Verify cost plan roll up to project/demand and program	Validate the total planned cost rollup from project and demand to program.	Madrid
PMO: Verify cost plan roll up to project/demand, program and portfolio	Validate the total planned cost rollup from project and demand to portfolio.	Madrid
PMO: Verify financials of Project created from Demand - Simple Financials	Validate the financial tab fields of a project created from a demand.	Madrid
PMO: Verify financials of Project created from Demand - With budget, cost plans, benefit plans	Validate the budget, cost plan, and benefit plan of a project created from a demand.	Madrid
PMO: Verify ETC/EAC at cost plan breakdown and project level	Validate the EAC and ETC values at cost plan breakdown and project level.	Tokyo

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PMO: Innovation Management Tests for verifying idea life cycle

Test	Description	Release version
Validate state changes of Idea	Validate that the state of idea is changed when an idea is accepted, rejected, or any other task is created from an idea.	San Diego

PMO: Project Management tests for validating basic life cycle and project rollups test suite

Test	Description	Release version
Validate PPM Cycle from Ideation to demand to project closure	Validate the flow of creating an idea, converting the idea to a demand, and then converting the demand to a project. **Note:** This test fails if the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin is active.	Madrid
Validation of State and Date Rollup for Automatic Project	Validate the date and state rollup from tasks for a project of type Automatic.	Madrid
Validation of State and Date rollup for Manual Project	Validate the date and state rollup from tasks for a project of type Manual.	Madrid
Validation of project percent complete when all tasks are Closed Incomplete	Validate the project percent complete when all the tasks are closed as Closed Incomplete.	Orlando
Validate Project is not 100 percent complete if it has atleast one task as closed incomplete	Validate the project percent complete is not 100% when at least one of the tasks is closed as Closed Incomplete or Closed Skipped with task % complete less than 100%.	Orlando
Validate waterfall project does not show Agile Planning Board	Validate that the waterfall projects cannot use the following: • Add stories or epics • Add agile phase • Access Agile board from the project	Orlando
Validate dates are rolled up from existing projects to program	Validate that the start and end dates of the project are rolled up to the program to which the project belongs.	Paris
Validate dates are rolled up from new projects to program	Validate that the start and end dates of a new project are rolled up to the program to which the project belongs.	Paris

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PMO: Project Management tests for validating basic life cycle and project rollups test suite (continued)

Test	Description	Release version
Add projects and demands with risks or issues to program	Validate that the projects and demands with risks or issue records associated with them are added to the program.	Paris
Add projects and demands with benefit plans to program	Validate that the projects and demands with benefit plans associated with them are added to the program.	Paris
Add projects and demands with cost plans to program	Validate that the projects and demands with cost plans associated with them are added to the program.	Paris
Validate program dates on addition of existing demands	Validate that the start and end date of the program are adjusted on addition of an existing demand.	Paris
Validate program dates on addition of new demands	Validate that the start and end date of the program are adjusted on addition of a new demand.	Paris
Validate program state rollup	Validate that the program state is rolled up from state of all the projects in the program.	Paris
Verify Demand task due date column field value empty	Validate that the **Due date** field is empty for a new demand task.	Rome
Verify baseline is created on Project & Demand when demand is converted to project	Validate that a project and demand baseline is created when a demand is converted to a project.	Rome
Verify timecard financial appears on Demand when time card submitted against demand task	Validate that the actual cost of the demand is updated when a time card is processed for a demand task.	Rome
Validate demand approved date	Validate that the approved dates for demand and the project created from the demand are the same.	Tokyo
Validate project preference "close project milestone tasks when they change to work state"	Validate that the milestone tasks are closed when their state is changed to Work in Progress after setting the project preference to "close project milestone tasks when they change to work state".	Tokyo
Validate project preference "Enable move project for WIP projects"	Validate that the project start date is changed appropriately for a project in WIP state when the project start date is changed after setting the project preference to "Enable move project for WIP projects".	Tokyo
Validate project preference "Rollup	Validate that the start date of a project task does not roll up to the project when the project planned dates are different	Tokyo

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PMO: Project Management tests for validating basic life cycle and project rollups test suite (continued)

Test	Description	Release version
project start date from tasks"	than the project task start date after deselecting the project preference "Rollup project start date from tasks".	

Child Test Suite: Validation of Move Project Action

Test	Description	Release version
Validate Planned start date of a project can be shifted by using the Move project action	Validate that the Planned start date of a project in Planning or Open state can be updated to a later or earlier date than the current planned start date using the Move project related link.	Orlando
Validate Move Project is disabled when Project is selected for execution	Validate that the Move Project option is not available if the Project is in Execution phase.	Orlando
Validate Move Project functionality with sprint dates populated for an agile phase	Validate that the sprint start and end dates are cleared when the project is moved using the Move Project related link. **Note:** This test is available only when Agile Development 2.0 plugin (com.snc.sdlc.agile.2.0) is activated.	Orlando
Validate Move Project functionality with external dependencies and related entities	Validate that the external dependencies and related entities are also shifted and redrawn when the project is moved using the Move Project related link.	Orlando
Validate Move Project functionality with different project states	Validate that the Move Project does not work when the project is in Work In Progress or Closed Complete state.	Orlando

Child Test Suite: Verify RIDAC flow of a Project

Test	Description	Release version
Verify RIDAC flow for Risk	Validate the RIDAC flow for a risk associated with a project.	Quebec

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Child Test Suite: Verify RIDAC flow of a Project (continued)

Test	Description	Release version
Verify RIDAC flow for Issue	Validate the RIDAC flow for an issue associated with a project.	Quebec
Verify RIDAC flow for Decision	Validate the RIDAC flow for a decision associated with a project.	Quebec
Verify RIDAC flow for Action	Validate the RIDAC flow for an action associated with a project.	Quebec
Verify changes in fields of risk form	Validate that any change is the Risk form fields such as Risk rank, Risk value, and Probability is updated successfully upon submission.	Quebec

Child Test Suite: Verify RIDAC flow of a Demand

Test	Description	Release version
Verify RIDAC flow for Risk	Validate the RIDAC flow for a risk associated with a demand.	Quebec
Verify RIDAC flow for Issue	Validate the RIDAC flow for an issue associated with a demand.	Quebec
Verify RIDAC flow for Decision	Validate the RIDAC flow for a decision associated with a demand.	Quebec
Verify RIDAC flow for Action	Validate the RIDAC flow for an action associated with a demand.	Quebec
Verify changes in fields of risk form	Validate that any change is the Risk form fields such as Risk rank, Risk value, and Probability is updated successfully upon submission.	Quebec

PMO: Resource Management tests for verifying the resource plan flows test suite

Test	Description	Release version
Verify user resource plan flow	Validate that the resource plan of a project can be moved to canceled state from planned state.	Madrid

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PMO: Resource Management tests for verifying the resource plan flows test suite (continued)

Test	Description	Release version
from Planned to Canceled state		
Verify group resource plan flow from Planned to Complete state	Validate that the resource plan of a project can be moved to complete state from planned state.	Madrid
Verify role resource plan flow from Planned to Allocated state	Validate that the resource plan of a project can be moved to allocated state from planned state.	Madrid
Verify aggregated cost of all resource plans roll up to the corresponding project or demand fields	Validate that the aggregated cost of all resource plans on a project or demand roll up to the Planned Cost and Allocated Cost fields and the Resource Cost section of respective projects and demands.	Orlando
Verify Copy Resource plan option	Validate that the Copy Resource plan option creates an exact copy of the source resource plan in the Planning state	Orlando
Verify resource plan aggregate roll up from project/ demand to program	Validate that the aggregated cost of all resource plans on a project or demand roll up to the total planned cost of the associated program.	Orlando
Verify records on completion of a resource plan	Validate the changes in a resource plan on completion: • The state of the resource plan is updated to Completed. • If the completion date is earlier than the resource plan end date, the end date of the resource plan is updated with the completion date. If the completion date entered is later than the resource plan end date, the resource plan end date is retained. • All the requested and allocation records for the resource plan for the period after the completion date are deleted. If there are any actual hours logged against an allocation, that allocation is not deleted. For those allocation records, the allocated hours become zero and the actual hours are retained. • The available and allocated hours for resources are updated in the aggregate tables.	Orlando
Verify records on completion of a resource plan with	Validate the following on completion of a resource plan with Planned Duration as allocation type:	Orlando

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PMO: Resource Management tests for verifying the resource plan flows test suite (continued)

Test	Description	Release version
Planned Duration as allocation type	• The state of the resource plan is updated to Completed. • Allocations are not deleted. • End date of the allocation is updated to the completion date.	
Verify the RP replan Capability	Validate that when a cancelled resource plan is re-planned, the state of the resource plan changes to Planning.	Orlando
Verify whether change in resource plan is reflected in corresponding cost plan	Validate that when a resource plan is updated, the corresponding cost plan is updated accordingly. For example, if the total planned cost is 500 USD, and the planned hours is 10, and you change the planned hours to 20, the total planned cost is updated to 1000 USD.	Paris
Resource-Test the default population of resource plan start & end date	Validate the following on creating a user or group resource plan from the related list of a demand: • If a demand is created without a start date and end date, the user or group resource plan has task as demand and no start and end date. • If a demand is created with a start date and end date, the user resource plan has task as demand and the start date and end date as added for the demand.	Paris
Validate that actual hours in operational resource plan and time card are equal	Validate that when a time card category is mapped with an operational work type, on submitting the time card for the operational resource plan associated with that work type, the actual hours in the resource plan and the time card are equal.	Quebec
Verify Resource plan auto population for Operational plans	Validate that the operational resource plans associated with a time card are automatically retrieved on the time card when time is logged.	Rome
Verify resource plan auto population for non-operational resource plans	Validate that the resource plans associated with a project, project task, or demand for a time card are automatically retrieved on the time card when time is logged.	Rome

Related topics

Quick start tests

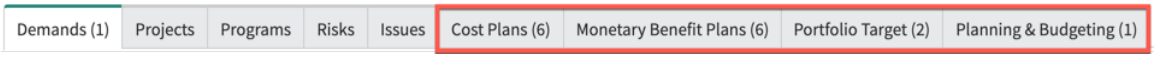
Related lists added for financials

PPM Standard adds several related lists to both the Project and Portfolio forms.

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Portfolio related lists

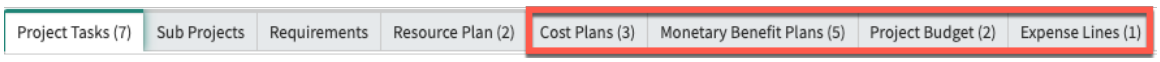
Portfolio related lists for financials



This table explains the related lists and how to create or use the records in these lists in the portfolio workbench.

Portfolio form related lists	Description
Cost Plans	Lists the cost plans of projects and demands that are part of the portfolio.
Monetary Benefit Plans	Lists the financial benefit plans of projects and demands that are part of the portfolio.
Portfolio Target	Lists the portfolio capital and operational expense target for different fiscal years. The values are displayed from the project_funding table. Set these values in the Set Target stage of the portfolio workbench. You can create targets for different financial periods.
Planning & Budgeting	Financials section of the Project form

Project related lists for financials



This table explains the related lists for financials in a project record.

Project form related lists	Description
Cost Plans	Costs of the project for a specific fiscal period. Cost plans can also have an associated expense line.
Monetary Benefit Plans	Potential financial benefits which can be accrued by the project spanning one or more fiscal periods, if the project is executed.
Project Budget	Financials section of the Project form
Expense Lines	Aggregated actual costs associated with a specific source, such as a user, fixed asset, or a CI.

SPM Benchmarks

The ServiceNow® SPM Benchmarks application provides you with an insight into the industry averages of your peers. Use your key performance indicators (KPIs) to compare your performance with global benchmarks, which contributes to improved performance for your organization.

Getting started with SPM Benchmarking This video provides an overview of how you can get started with SPM Benchmarks.

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Exploring SPM Benchmarks

The SPM Benchmarks application provides clear visibility into your key performance indicators (KPIs) and trends, providing comparative insights relative to the industry averages of your peers. It enables you to gain deeper insights by comparing your performance with your peers based on industry, size, or region.

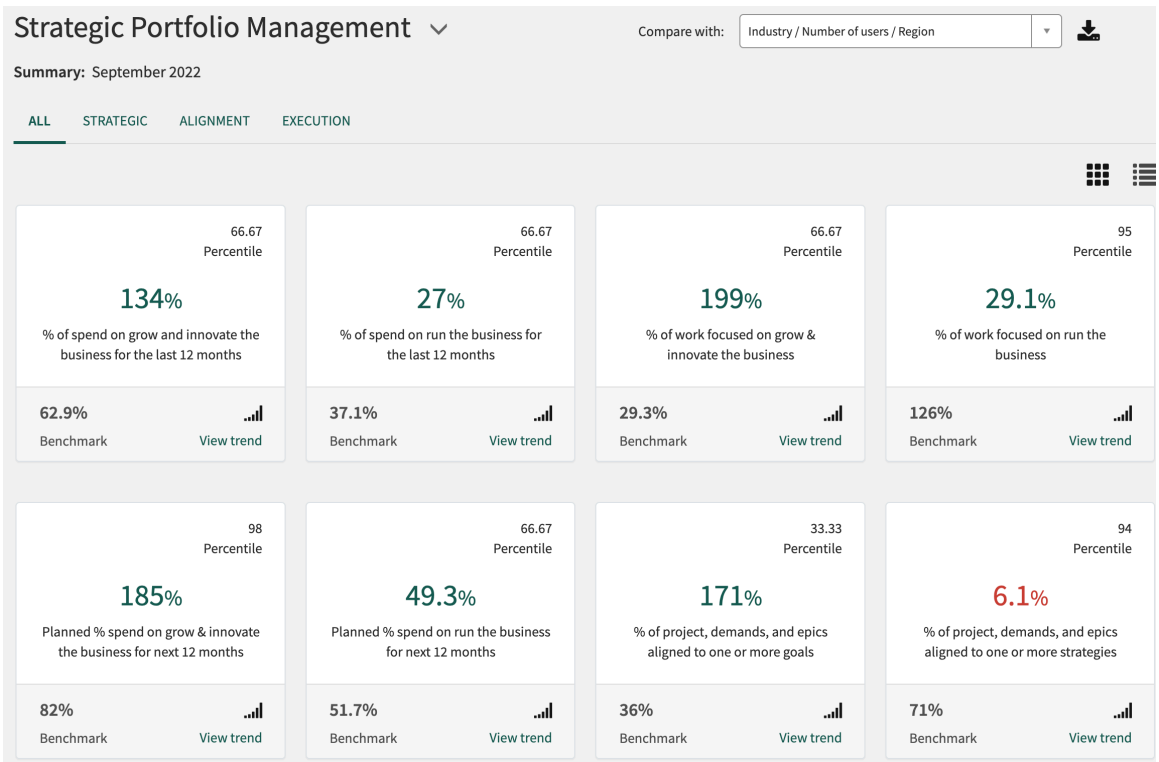
Key features

- 15 available KPIs (6 Strategic, 5 Alignment, and 4 Execution).
- Ability to change KPI definitions to match customizations.
- ServiceNow® Benchmarks dashboard in ServiceNow® Service Portal (mobile friendly).
- Ability to download KPI reports.
- Email notification when new aggregate monthly data is available.
- Filter data by industry, number of users, or geographical region.
- Percentile ranking to indicate your standing within your participating peer group.
- Product category-based roles to limit data access.
- Integration with ServiceNow® Performance Analytics for daily data collection and drill-down on KPI data.

SPM Benchmarks dashboard

View and learn about the SPM Benchmarks dashboard features.

SPM Benchmarks dashboard



The SPM Benchmarks dashboard enables you to do the following.

View KPIs

You can view the KPIs in the following categories.

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- The **All** tab shows the list of all the KPIs that you've opted in to.
- The **Strategic** tab shows the list of all the strategic KPIs that you've opted in to.
- The **Alignment** tab shows the list of all the alignment KPIs that you've opted in to.
- The **Execution** tab shows the list of all the execution KPIs that you've opted in to.

Change the KPI view

You can change the way that the KPIs are displayed on the dashboard.

- Click the card view icon () to view your KPIs in a card view.
- Click the list view icon () to view your KPIs in a list view.

Select comparative data

You can select the area in which you want to compare your data using the Compare with drop-down list.

- **Industry**- Select this option to compare your data based on industries.
- **Number of users**- Select this option to compare your data based on the number of users.
- **Region**- Select this option to compare your data based on the region.

Benefits of SPM Benchmarks

The SPM Benchmarks application provides you with an overall understanding of your performance compared to your peers.

Global anonymity

Viewers in your organization have access to SPM Benchmarks for your organization. However, the global benchmarks are anonymous and don't include any company information.

Industry comparison

Using the Compare with drop-down list on the SPM Benchmarks dashboard, filter the benchmarks results by industry, ServiceNow user size, or geographical region to make the results more relevant to your organization.

- Industry is determined based on the standard industry code in the account record for the company.
- Number of users is determined by the number of ServiceNow active users within the company. You can compare your company to similar-sized ServiceNow implementations to gain an understanding about your company.
- Region is determined based on the **Region** field in the company table.

If a filter category includes fewer than 20 participants, the corresponding data is shown in the Other category.

Trends

You can see the results of all published KPIs as well as the last six months of history.

Use the trend data to determine what is working well and what needs improvement.

Reports

SPM Benchmarks reports get refreshed monthly that can be downloaded in PDF format. An email notification is sent to the customer when new data is available.

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Configuring SPM Benchmarks

Learn about the process required to set up SPM Benchmarks to view the comparative understandings on your key performance indicators (KPIs).

Use the following steps as guidelines for your SPM Benchmarks setup process.

1. Install SPM Benchmarks. For more information, see Install SPM Benchmarks.
2. Enable SPM Benchmarks. For more information, see Enable SPM Benchmarks.

Install SPM Benchmarks

As an admin, you can install the SPM Benchmarks application (sn_spm_bm) from the ServiceNow® Store.The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the SPM Benchmarking application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with SPM Benchmarks:

- Roles
- Scheduled jobs

For more information, see Components installed with SPM Benchmarking.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the SPM Benchmarks application () using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Select **Install**.

Enable SPM Benchmarks

Opt in to SPM Benchmarks to participate in SPM Benchmarks data collection for Strategic Portfolio Management KPIs.

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Before you begin
Role required: sn_bm_client.benchmark_admin

About this task
You can opt out of the SPM Benchmarks at any time.

Procedure
1. Navigate to **All** > **Benchmarks** > **Setup**.
2. Click **Opt-In Agreement** and read the agreement.
3. Click **Done**.
4. Select the **Yes, I have read and accept the Opt-In Agreement** check box, and click **Opt-In**. You can choose to opt out of SPM Benchmarks at any time. To opt out of benchmarks as a whole, including but not limited to SPM Benchmarks, navigate to **All** > **Benchmarks** > **Setup** and click **Opt-out of ServiceNow Benchmarks**.

Customize the SPM Benchmarks KPIs

You can customize the KPI information you would want to see in your SPM Benchmarks dashboard.

You can use the SPM Benchmarks application to do the following:

- Choose your KPIs from the list of available KPIs, based on your organizational requirement.
- Change a KPI formula to adjust the details pertaining to your organizational need.

Choose your KPIs

Based on your requirement, you can choose the key performance indicators (KPIs) that you want to use in the SPM Benchmarks application.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Benchmarks** > **Administration** > **Setup**.
2. Select **Strategic Portfolio Management** to view the list of SPM Benchmarks KPIs.
3. Select the KPIs that you need for your organization.

Change a KPI formula

View and change the key performance indicators (KPIs) formula according to your requirement and analysis criteria.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Benchmarks** > **Administration** > **Category**.
2. From the Benchmark Indicator Categories list, select **Strategic Portfolio Management**.

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3. Select a group that contains the KPI that you want to edit from the **Benchmark Indicator Groups**.
4. Click and open the KPI that you want to edit.
5. Click and open the indicator field to view and edit the formula.

SPM Benchmarks reference

Reference information to provide additional details about SPM Benchmarks such as the fields, user roles, and scheduled job information.

Components installed with SPM Benchmarking

Several types of components are installed with activation of the SPM Benchmarks plugin, including tables, user roles, and scheduled jobs.

Roles installed

Role title [name]	Description	Contains roles
Benchmarking admin [sn_bm_client.benchmark_admin]	• Set up Benchmarks from an instance • Opt in or out of the Benchmarks program • Enable, disable, or modify indicators (including changing Performance Analytics indicator source, script, and conditions for those KPIs not requiring application-specific roles) • Receive email notification when new aggregate monthly data is available • All functions of the Benchmarks viewer and Benchmarks recommendations roles	None
Benchmarking data viewer [sn_bm_client.benchmark_data_viewer]	• View full benchmark reports in Service Portal • View data visualizations and drill-downs for analyzing trends (not PA scorecards) • Download visualizations • View industry category or size comparisons • Receive email notification when a new aggregate monthly benchmark score is available.	None

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Scheduled jobs installed

Scheduled job	Description
SPM Benchmark Agile Data Collection	Collects scores for indicators related to Agile Development 2.0, as specified in the **Relative start** and **Relative end** fields. The collection time is for a month based on the GMT timezone.
SPM Benchmark Data Collection	Collects scores for indicators related to APW and PPM, as specified in the **Relative start** and **Relative end** fields. The collection time is for a month based on the GMT timezone.

SPM Benchmarks KPIs

The Strategic Portfolio Management KPIs are performance analytic indicators that collect the usage count data. Strategic, Alignment, and Execution KPIs are available by default in the SPM Benchmarks application.

Strategic KPIs

KPI	Formula
% of spend on grow and innovate the business for the last 12 months	(Sum of Actual cost spent on Projects & Demands that belong to innovate & grow in the last 12 months / Sum of Actual cost spent on all Projects & Demands in the last 12 months) * 100
% of spend on run the business for the last 12 months	(Sum of Actual cost spent on Projects & Demands that belong to run in the last 12 months / Sum of Actual cost spent on all Projects & Demands in the last 12 months) * 100
% of work focused on grow & innovate the business	(Count of all Projects, Demands & Epics that belong to grow & innovate / Count of all Projects, Demands & Epics) * 100
% of work focused on run the business	(Count of all Projects, Demands & Epics that belong to run / Count of all Projects, Demands & Epics) * 100
Planned % spend on grow & innovate the business for next 12 months	(Sum of Planned cost on Projects & Demands that belong to innovate & grow in next 12 months / Sum of Planned cost on all Projects & Demands in next 12 months) * 100
Planned % spend on run the business for next 12 months	(Sum of Planned cost on Projects & Demands that belong to run in the next 12 months / Sum of Planned cost on all Projects & Demands in the next 12 months) * 100

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Alignment KPIs

KPI	Formula
% of project, demands, and epics aligned to one or more goals	(Count of Projects, Demands & Epics that are aligned to one or more goals / Count of all Projects, Demands & Epics) * 100
% of project, demands, and epics aligned to one or more strategies	(Count of Projects, Demands & Epics that are aligned to one or more strategies / Count of all Projects, Demands & Epics) * 100
% of work delivered using traditional projects	(Total count of open Project planning items that are having execution type as Waterfall / Total count of open Project planning items and Epic planning items) * 100
% of work delivered using agile	(Total count of open Epic planning items / Total count of open Project planning items and Epic planning items) * 100
% of work delivered using hybrid projects	(Total count of open Project planning items that are having execution type as Hybrid or Agile / Total count of open Project planning items and Epic planning items) * 100

Execution KPIs

KPI	Formula
% of demands converted to projects or epics	(Count of Demands that are converted to Projects or Epics in last 12 months / Count of Demands that are created in last 12 months) * 100
% of story points completed vs planned with the sprint, in last 12 month	(Total story points completed in the sprint that falls in last 12 months / Total story points planned in the sprint that falls in last 12 months) * 100
Average number of scrum teams per ART	Total number of teams in ARTs / Total number of ARTs
Average scrum team size	Total number of members in scrum teams / Total number of scrum teams

Investment Funding

ServiceNow® Investment Funding enables you to plan and manage investments by allocating funds to investment entities such as Business Units, Products, Teams, and the like. Prioritize your investments based on business needs and strategic objectives of your organization.

You can use the Investment Funding (sn_invst_pln) application to do the following:

- Create investments for entities.
- Allocate funds to an investment to meet a business requirement or strategic objective.
- Request funds from one or more funding sources to achieve business goals.

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Note:
Starting with the Rome release, Investment Funding will be found in the ServiceNow Store. The legacy plugins (com.snc.investment_planning, com.snc.investment_planning_pmo) will be prepared for future deprecation in September 2022. The plugins will be hidden and no longer activated on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

Investment entities and investments

An investment contains information about funds, costs, benefits, business case, and goals. Use investments to allocate or request funds to meet defined business goals. An investment is associated to an investment entity.

An investment entity is a transaction table for funding. For example, you can create investment entities for records such as Projects, Teams, Business Units, Epics, and Portfolios.

Keeping the investment and investment entity separate provides the following advantages:

- Your work activities are separate from the funding.
- You can fund the same entity for different periods until the investment goals are met.

Generic investments

A generic investment is an investment that is tied an owner without being associated to any entity. You can fund any entity or other generic investment from a generic investment.

For example, as the CEO of a company you might want to set aside some funds for a training or research initiative and there might not be a transaction table to enable such an entity. You could then create a generic entity to fund the investment.

Top-down and bottom-up funding

In top-down funding, you distribute funds to investments based on business goals or as part of a business strategy.

In bottom-up funding, you request funds for your investments from one or more funding sources.

Investment Funding enables you to manage funds for both funding approaches.

Domain separation in Investment Funding

Domain separation provides complete data isolation for domain-specific users. Investment Funding is compliant with domain separation at the **Data only** level.

Install Investment Funding

You can install the Investment Funding application (sn_invst_pln_v2) from ServiceNow Store if you have the admin role.

Before you begin
Ensure that the application and all of its associated store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

Role required: admin

About this task
Investment Funding activates these related plugins if they are not already active.

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Plugins for Investment Funding

Plugin	Description
Fiscal Calendar [com.snc.fiscal_calendar]	Enables you to generate and manage different kinds of fiscal calendars that are used in various financial applications.
Widgets [com.snc.app.widgets]	Enables widgets on the dashboard pages.
Ag-Grid Components Plugin [com.snc.app.grid]	Enables grid view.
Planned Task_v2 [com.snc.planned_task_v2]	Enables task entities.

If the PPM Standard (com.snc.financial_planning_pmo) plugin is also installed, you can use the Investment Funding features to request or allocate funds for your projects and demands.

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the Investment Funding application using the filter criteria and search bar.
   You can search for the application by its name or ID (sn_invst_pln_v2). If you cannot find an application, you may have to request it from ServiceNow store. Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release note information for all released apps, see the ServiceNow Store version history release notes.
3. Click **Install**.
4. In the Application installation dialog box, review the application dependencies.

   If your application requires other applications, install them first if they are not already installed.

   Installing your application also automatically installs the dependent applications or plugins if they are not installed already.
5. Click **Install**.

Result

The following components are installed with installation of the Investment Funding application:

- Roles
- Tables

See Components installed with Investment Funding for more information.

Components installed with Investment Funding

Several types of components are installed with activation of the Investment Funding (sn_invst_pln) plugin, including tables and user roles.

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Note:
The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Roles installed with Investment Funding

Role title [name]	Description	Contains roles
Investment admin [sn_invst_pln_v2.investment_admin]	Creates investment entities and sets up preferences and fiscal calendar.	fiscal_calendar_admin
Investment planner [sn_invst_pln_v2.investment_planner]	Manages top investment, investment entities, and records associated with investment entities.	investment_user
Investment user [sn_invst_pln_v2.investment_user]	Manages investments and funds. **Note:** Users with this role can perform create, read, update, and delete operations on all cost and benefit plans.	fiscal_calendar_user

Tables installed with Investment Funding

Table	Description
Business Case [business_case]	Stores business cases for investments.
Fund Request [sn_invst_pln_invst_funding_base_request]	Stores fund request details.
Funding [sn_invst_pln_invst_funding_base_fund]	Stores fund details.
Funding Base [sn_invst_pln_invst_funding_base]	Base table for funding and requests.
Funding Base Breakdown [sn_invst_pln_invst_funding_base_breakdown]	Stores the breakdown of funding base records.
Funding Configuration	Stores funding configuration details.

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Table	Description
[sn_invst_pln_invst_funding_configuration]	
Investment Entity [sn_invst_pln_invst_funding_entity]	Stores investment entity types.
Funding State [sn_invst_pln_invst_funding_state]	Stores different states of a funding.
Investment [sn_invst_pln_invst_investment]	Stores investment details.

Upgrading legacy Investment Funding to Store application

If you are upgrading from the legacy Investment Funding, post installation of the Investment Funding application, you can migrate your existing data to the ServiceNow Store application tables. Also, you must update the reference tables for the **Investment** and **Funding Entity** fields to the ServiceNow Store application tables.

Migrate data from legacy Investment Funding to Store application

With the admin role, you can migrate your existing data from the legacy Investment Funding tables to the new ServiceNow Store application tables by running the scheduled job.

Before you begin
Role required: admin

Note:
Migrating data to the ServiceNow Store application tables is a one-time job, and not meant to be on a schedule.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Search for and click the **Migrate Investment Funding To Store** scheduled job.
3. On the Scheduled Script Execution form, ensure that the frequency is selected as **On Demand** in the **Run** field.
4. Click **Execute Now**.

Update references from legacy Investment Funding tables to Store tables

Post migration of your legacy Investment Funding data, you must update the reference tables for the **Investment** and **Funding Entity** fields from the legacy Investment Funding tables to the ServiceNow Store application tables in the required tables.

Before you begin
Role required: admin

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Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Update the reference tables from the legacy Investment Funding tables to the Store application for the **Investment** and **Funding Entity** fields for the following tables.

Table	Column label (Field)	Reference table for the legacy Investment Funding plugin	Reference table for the Store application
Cost Plan	Investment	invst_investment	sn_invst_pln_invst_investment
Cost Plan	Funding Entity	invst_investment_entity	sn_invst_pln_invst_funding_entity
Benefit Plan	Investment	invst_investment	sn_invst_pln_invst_investment
Goal	Investment	invst_investment	sn_invst_pln_invst_investment

Investment Funding administration

The Investment Funding application requires you to do some initial administrative tasks for it to be fully functional.

Fiscal calendar setup for Investment Funding

The Fiscal calendar setup you choose determines the fiscal periods used by your organization to request or allocate funds.

Based on the fiscal calendar setup, you can then set the funding frequency that aligns with the funding cycles your organization uses, such as monthly or quarterly, for fund requests and allocations.

Note:
Once you allocate or request funds for investments for a fiscal period, you cannot change to another fiscal calendar type.

For information about fiscal calendars, see Defining fiscal calendars.

For information about how to generate a fiscal calendar, see Generate a fiscal calendar.

Set Investment Funding preferences

As an administrator, you can set global defaults for Investment Funding preferences, which affect the funding behavior.

Before you begin
Role required: sn_invst_pln_investment_admin

Procedure

1. Navigate to **All** > **Investment Funding** > **Setup** > **Preferences**.
2. In the **Funding frequency** list, select a frequency of periods in which you can request or allocate funds to an investment.

   The list shows options based on the configured fiscal calendar.

   For example, if you set up the Standard fiscal calendar and you want to fund your investments quarterly, select **Quarter**.

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The default value is Quarter for the Standard fiscal calendar setup or Period for any other fiscal calendar setup.

3. **Optional:** In the **Number of editable past periods** field, enter a number to specify the number of past periods enabled for you to modify the allocated or requested fund.

   (Optional) For example, if the funding frequency is Quarter and you enter 2 in the field, you can edit funds for the previous two quarters.

   The default value is 0 (editing of past period funding is not enabled).

4. **Optional:** Select the **Hide actuals in tree view** check box to hide the actual amount of an investment in the tree view cards.
5. **Optional:** Select the **Allow fund overallocation** check box to enable allocation of funds in addition to the received funds.
   The **Fund overallocation percent (%)** and **Allow fund overallocation at investment level** fields are enabled.
6. **Optional:** In the **Fund overallocation percent (%)** field, enter the percentage by which funds can be allocated in addition to the received funds.

   (Optional) For example, if the received fund amount is $200,000, and you enter 10% in the **Fund overallocation percent** field, a total of $220,000 can be used for funding.

7. **Optional:** Select the **Allow fund overallocation at investment level** check box to enable source investment owners who have funded the investment and are not removed from the allocation to override the fund overallocation percent at investment level.
8. Click **Save**.
9. Select an option from the confirmation window that is displayed:
   - Update the overallocation preferences at the investment level for all existing investments
   - Update the overallocation preferences at the investment level for existing investments that have not overridden the overallocation percentage
   - Update the overallocation preferences at the investment level only for new investments
10. Click **Confirm**.

Create an investment entity

Create an entity for investments through which you can receive or allocate funds.

Before you begin

Role required: sn_invst_pln_v2.investment_admin

Procedure

1. Navigate to **All** > **Investment Funding** > **Setup** > **Investment Entities**.
2. Click **New**.
3. On the form, fill in the fields.

Note:
The **Entity** tab in the form is replaced by the **Owner** tab when the **Generic** option is selected.

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Investment Entity form

Field	Description
Name	Unique name of the investment entity.
Active	Option for indicating the status of the investment entity. You can create investments only for active investment entities.
Description	Short description of the investment entity.

When the **Generic** option is not selected:

Entity tab

Field	Description
Table	Transaction table on which funding is enabled.
Condition	Condition to filter data from the table enabled for funding. For example, you could enable funding for the Project table and add a filter condition to list only projects that are in the Ready state.
Owner field	Any user field in the transaction table mapped to the investment owner field. The user on the mapped field is automatically assigned as the investment owner when you are creating an investment. For example, for a Project investment entity, you could map the Project manager field as the investment owner field.

When the **Generic** option is selected:

Owner tab

Field	Description
Owner table	User table mapped as the investment owner field.
Owner filter	Condition to filter users that are listed in the **Owner** field in the Investment form to select the investment owner.

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Field	Description
	For example, for a Project investment entity, you could create a filter to list only users with the Project manager role. By default, the **Active is true** filter is set, which means that only active users are listed for selection.

4. **Optional:** Click the **Unlock fundable entities** icon to enable the selection of entities that can be funded by the current entity.

   (Optional) For example, a portfolio entity can fund a program, a program can fund a project, a project can request from a program, and a program can request from a portfolio.

5. **Optional:** Add the entities to the **Fundable entities** list.

   (Optional) If no value is selected, all entities are considered to be enabled for funding.

6. Click **Submit**.

What to do next

- Create funding artifacts to create a business rule to synchronize investment and investment entity owners or to add a related link on the investment target form.
- Create a top-level investment or an investment for an investment entity.

Enable synchronization of investment and investment entity owners

Create a business rule for an investment entity that synchronizes the investment owner with the investment entity owner. If you update the name of the investment entity owner, the owner of the corresponding investment and the **Viewable by** field for the investment is automatically updated.

Before you begin

Role required: sn_invst_pln_v2.investment_admin

Procedure

1. Navigate to **All** > **Investment Funding** > **Setup** > **Investment Entities**.
2. Open an entity for which you want to enable synchronization of owners.
3. On the form, click the **Create Funding Artifacts** related link.
4. In the dialog box, select the **Create business rule to sync investment owner with investment entity owner** option, and click **OK**.

Result

A business rule is created for the investment entity that synchronizes the owner of the investment with the associated investment entity owner when you update the investment entity owner.

Access investments directly from an investment target

Create a related link to go directly to the My Funds page from an investment target.

Before you begin

Role required: sn_invst_pln_v2.investment_admin

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Procedure

1. Navigate to **All** > **Investment Funding** > **Setup** > **Investment Entities**.
2. Open an investment entity for which you want to create a related link.
3. On the form, click the **Create Funding Artifacts** related link.
4. In the dialog box, select the **Create related link for requesting/funding on the form** option, and click **OK**.
5. Click **OK**.

Result

The **Add/View Investments** related link appears on the form of the investment target for direct navigation to the My Funds page.

Create a top-level investment

Create a top-level investment for the investment entity record for which you want to receive and allocate funds.

Before you begin

Role required: sn_invst_pln_v2.investment_planner

About this task

A top-level investment does not have a source investment or source investment entity. Once created, a top-level investment cannot be converted to a normal investment later.

Procedure

1. Navigate to **All** > **Investment Funding** > **Top level Investments**.
2. Click **New**.
3. On the form, fill in the fields.

New Top level Investment form

Field	Description
For	Investment entity record to associate with the investment. To access the records associated with an entity, select an investment entity in the list on the left. The list on the right then displays the records associated with the selected entity. You can create only one top-level investment for an investment entity type-investment entity value pair. **Note:** When you select the **Generic Bucket** entity option, the list to select the associated entity record is disabled.
Owner	User who will own the top-level investment.

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Field	Description
	This field is set to the **Owner field** value determined while creating the selected investment entity.
Name	Unique name of the investment.
Top investment	Option that indicates that this is a top-level investment. This setting cannot be changed.

4. Click **Create**.

What to do next

- Fund a top-level investment to meet the business goals.
- Create a business case to define the business need of the investment.

Fund a top-level investment

Allocate funds to a top-level investment so that the investment owner can distribute funds further.

Before you begin

Role required: sn_invst_pln_v2.investment_planner

Procedure

1. Navigate to **All** > **Investment Funding** > **Top level Investments**.
2. Open an investment to which you want to allocate funds.
3. On the **Details** tab, click **Add fund**.
4. On the form, fill in the fields.

Add fund form

Field	Description
Fiscal period	Fiscal period for which the fund is allocated to the investment.
Funded capex	Amount funded as a capital expense.
Funded opex	Amount funded as an operating expense.

5. Click **Submit**.

Result

The top-level investment is funded with the specified amount for the selected period.

Create an investment

Create an investment to fund a target.

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Before you begin
Role required: sn_invst_pln_v2.investment_user

Procedure

1. Navigate to **All** > **Investment Funding** > **My Funds**.
2. Click **New**.
3. On the form, fill in the fields.

Investment form

Field	Description
For	Investment entity record to associate with the investment. To access the records associated with an entity, select an investment entity in the list on the left. The list on the right then displays the records associated with the selected entity. **Note:** You can create only one top-level investment for an investment entity type-investment entity value pair.
Name	Unique name of the investment.

4. Click **Submit**.

What to do next

- Add a business case to define the business needs of the investment.
- Request funds from a funding source.
- Allocate funds from your available funds.

Add a business case for an investment

Add a business case for an investment to define its business needs and goals.

Before you begin
Role required: sn_invst_pln_v2.investment_user

About this task
An investment can have only one business case.

When a business case is created on a demand or project record, the same is mapped to the corresponding investment record. And when a business case is created on an investment record, the same is mapped to the corresponding demand or project record. Cost plans and benefit plans associated with project or demand records are also mapped to the investment records.

Procedure

1. Navigate to **All** > **Investment Funding** > **My Funds**.
2. Open an investment to add the business case.

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3. On the **Details** tab, click the **Create Business case** related link.
   The related link is available only if a business case does not exist for the investment.
4. In the Add Business case dialog box, provide information in the fields based on your business needs and goals for the investment.

Add Business case form

Field	Description
Name	Unique name of the business case.
Investment type	Type of the investment.
Investment class	Investment class category assigned to the investment: ○ **Run**: Investment made to sustain the existing business. ○ **Change**: Investment made to implement a change in the business.

Business case tab section of the Add Business case form

Field	Description
Description	Description of the business case supporting the investment.
Enablers	Key enablers for the investment.
Barriers	Major barriers to the investment.
Assumptions	Assumptions made for the investment that help to determine the scope and risks, and fine-tune the time and cost estimates.

Scope section of the Add Business case form

In scope	Scope of the investment, which includes a set of boundaries that define the extent of the investment.
Out of scope	Activities that are not in the scope of the investment.
Risk of performing	Risks associated with the investment if it is carried out.
Risk of not performing	Risks associated with the investment if it is not carried out.

5. Click **Submit**.

Co-owners for an investment

Investment co-owners manage, request, and allocate funds on your behalf to the investments that you own. The co-owner has the same rights and permissions as the owner.

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- Co-owners have the same capabilities and access rights as the owner for the investments, which include:
  - Add funds to top-level investments.
  - Add child investments and fund them.
  - Add and request source and funds from a top-level investment.
  - See, request, and allocate funds to child investments.
  - Add others as co-owners.
  - Delete any unfunded investments.
  - See who funded an investment.
- Co-owners are added to the **Viewable by** field for all the child investments.
- An investment can have multiple co-owners. There is no maximum limit for the number of co-owners for an investment.
- In the Active Investments page, you can see the access level for the investments.
  - Owned investments are marked with an owned icon ( ).
  - Co-owned investments are marked with a co-owner icon ( ).
  - Viewable investments are marked with a view only icon ( ).

Manage co-owners for an investment

Add co-owners to your investments to request, approve, and manage the funds on your behalf. You can remove the existing co-owners when you no longer need them to manage your investments.

Before you begin

Role required:

- For managing co-owners in top-level investments: sn_invst_pln_v2.investment_planner
- For managing co-owners in My funds: sn_invst_pln_v2.investment_user, sn_invst_pln_v2.investment_planner

Procedure

1. Open a top-level investment or My fund.
2. Click the **Details** tab.
3. Click the unlock co-owner icon ( ).
   - To add a user as a co-owner, use the select target record search field to search for and select the users.
   - To remove an existing co-owner, select the name and click the remove selected item icon ( ).
4. Click **Update**.

Request funds for an investment

Request funds from a funding source for your investment.

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Before you begin
Role required: sn_invst_pln_v2.investment_user

About this task
You cannot request funds for a generic investment from any other generic investment.

You can request funds only from generic source investments that have allocated funds to your investment in the past.

You can request funds only in the funding frequency configured in the Investment Funding Preferences.

You can request funds from only those entities that were added in the **Fundable entities** field while creating the entity.

You can withdraw funding requests that are in the requested and planning state and are for past funding periods or non-editable funding periods.

Procedure
1. Navigate to **All** > **Investment Funding** > **My Funds**.
2. Click an investment card to open the investment for which you need funds.

   If you want to open a different investment, access the drop-down menu next to the name of the currently displayed investment. Either search for another investment by entering its name in the **Search My Investments** field or choose it from the five most recently visited investments.
3. Click the **View/Request Funds** tab.
4. Select a working period and click **Apply**.
   The Request Funds list displays only funding sources that you previously requested funds from for your investment.
5. Click the **Add New Source** link to select the funding source.
6. In the **Select a Source** pane, select one or more source investments from the list, and then click **Add Selected**.
   The specified funding source is added in the Request Funds grid.
7. In the Request Funds grid, specify the amount in the **CapEx** and **OpEx** columns under **New/Modify Request** of the funding sources from which you want to request funds.
   The state of all updated funding sources changes to Draft or Planning, which is indicated by highlighted cells.
8. Click **Request**.
9. In the Confirm request dialog box, verify your requests and add a comment if required.
10. Click **Request**.
11. **Optional:** Right-click on a column on the **New/Modify Request** field and select **Withdraw** to withdraw a funding request.

Result
- Funds are requested from the source investments sources for the specified period.
- The state of the fund request record changes to Requested.

Plan fund allocations for investments

Plan your fund allocations if you are not yet ready to finalize the allocation of your funds.

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Before you begin
Role required: sn_invst_pln_v2.investment_user

About this task
Keep investments in the planning stage if you are not yet ready to allocate the funds. For example, you might want to wait to determine whether you require additional funds to meet the needs of all your investments.

If you plan to allocate funds to an investment that are in addition to the received funds, a warning message is displayed in the **Totals** row indicating that you are overallocating, and the additional fund amount will be deducted from the buffer amount set in your funding preferences. For more information on setting up overallocation of funds, see the Set Investment Funding preferences topic. If you plan to allocate beyond the available fund plus the buffer amount, an error message indicates that new funds cannot be submitted for allocation.

You can plan fund allocations only according to the funding frequency configured in the Investment Funding Preferences.

Procedure
1. Navigate to **All** > **Investment Funding** > **My Funds**.
2. Click an investment card to open an active investment that has funds that you plan to allocate to other investments.

   If you want to open a different investment, access the drop-down menu next to the name of the currently displayed investment. Either search for another investment by entering its name in the **Search My Investments** field or choose it from the five most recently visited investments.
3. Click the **Allocate Funds** tab.
4. Select a working period and click **Apply**.
   - If you have allocated funds earlier or there are incoming fund requests, those investments are listed in the **Allocate Funds** list.
   - You can filter for pending (planning and requested) investments by clicking the filter icon ( ).
5. In the **Allocate Funds** list, select the incoming requests to which you are planning to allocate funds.
6. Click **Plan**.

Result
- Funds allocations are planned for the selected investments for the specified period.
- The state of all updated investments changes to Planning, which is indicated by highlighted cells.
- The amount remaining after planning your allocations is displayed in the **Left after planning** row.

What to do next
Allocate funds to planned investments

Allocate funds to an investment

Allocate funds to investments based on your business goals and available funds.

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Before you begin
Role required: sn_invst_pln_v2.investment_user

About this task
You can allocate funds only in the funding frequency configured in the Investment Funding Preferences.

If you allocated funds to an investment earlier, you can increase or decrease the funded amount by entering an amount greater or lesser than the existing amount. Entering a lesser value unfunds the investment by the difference amount.

If you allocate funds to an investment that are in addition to the received funds, a warning message is displayed in the **Totals** row indicating that you are overallocating, and the additional fund amount will be deducted from the buffer amount set in your funding preferences. For more information on setting up overallocation of funds, see the Set Investment Funding preferences topic. If you try to allocate beyond the available fund plus the buffer amount, an error message indicates that new funds cannot be submitted for allocation.

You can allocate funds to only those entities that are added in the **Fundable entities** field while creating the entity.

Note:
For generic investments, you can allocate funds to investments that you own.

Procedure
1. Navigate to **All** > **Investment Funding** > **My Funds**.
2. Click an investment card to open an active investment that has sufficient funds to allocate to another investment.

   If you want to open a different investment, access the drop-down menu next to the name of the currently displayed investment. Either search for another investment by entering its name in the **Search My Investments** field or choose it from the five most recently visited investments.
3. Click the **Allocate Funds** tab.
4. Select a working period and click **Apply**.
   - If you have allocated funds earlier or there are incoming fund requests, those investments are listed in the **Allocate Funds** list.
   - You can filter for pending (planning and requested) investments by clicking the filter icon ( ).
5. **Optional:** Add more investments to the **Allocate Funds** list for allocating funds.

   a. Click **Add**.

   b. **Optional:** Click **New** to create a new entity record if you have sufficient privileges for the source entity.

   c. In the **Add** pane, select one or more investments from the list, and then click **Add Selected**.

   (Optional) To include all the listed investments, click **Add All**.
6. In the **Allocate Funds** list, enter the amount under the **CapEx** and **OpEx** columns under **New Fund** for all investments to which you want to allocate funds.

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Note:
For an incoming request, take into account the amount in the **New Request** column while entering amounts in the **CapEx** and **OpEx** columns under **New Fund**.

The state of all updated investments changes to Planning, which is indicated by highlighted cells.

7. Click **Fund**.
8. In the Confirm Allocate Funds dialog box, verify your allocations and click **Fund**.

   While confirming fund allocations, you can view all the details of the quarters where funds are available for funding in one section, and the details of the quarters where funds are not available for funding in another section.

9. **Optional:** Right-click on a column on the grid and select **View Past Funding Details** to view the funding details of your child investments for the past fiscal periods.

   (Optional) For more information, see the View past funding details topic.

Result

- Funds are allocated to selected investments for the specified period.
- The state of funded investments changes to Funded.

Enter actual spends for an investment

Enter actual spends for your investments to track fund utilization.

Before you begin
Role required: sn_invst_pln_v2.investment_user

About this task
You can use funds in your investments to execute business activities or allocate funds to other investments to meet business goals. You can record the amount spent as actual spends ("actuals") in the respective investment. Tracking actuals enables you to do the following:

- Track where and how you spent your funds.
- Add up to the parent investment actuals.

Actual cost incurred for projects or demands will be summed up and displayed in the Investment Funding grid automatically if there is a single funded source. If there are multiple sources, you need to perform the following steps to enter the actuals manually.

Note:

- (For customers upgraded from legacy Investment Funding plugin to the ServiceNow Store application) If you have entered actuals manually prior to upgrade, then the same does not match with the actuals posted in the project post-upgrade.
- If the **Budget** field on the cost plan breakdown of a project or demand has been edited post funding, the CapEx and OpEx budgets do not match the amount funded from the Investment Funding flow.

Procedure

1. Navigate to **All** > **Investment Funding** > **My Funds**.
2. Open an investment for which you want to enter actuals.

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If you want to open a different investment, access the drop-down menu next to the name of the currently displayed investment. Either search for another investment by entering its name in the **Search My Investments** field or choose it from the five most recently visited investments.

3. Click the **View/Request Funds** tab.
4. Select a working period and click **Apply**.
5. In the Request Funds list, specify the actual amount spent under the **Actual CapEx** and **Actual OpEx** columns for your investments.

Note:
If you do not see the **Actual CapEx** and **Actual OpEx** columns in the list, click the configuration icon () and select them.

Result

- The entered amount is updated as actual funds spent through the investment.
- The amount rolls-up to its parent investment, which in turn rolls-up until the top-level investment.

Reject a fund request

You can reject an incoming fund request based on your business priorities or if you do not have sufficient funds.

Before you begin

Role required: sn_invst_pln_v2.investment_user

Procedure

1. Navigate to **All** > **Investment Funding** > **My Funds**.
2. Open an active investment.

   If you want to open a different investment, access the drop-down menu next to the name of the currently displayed investment. Either search for another investment by entering its name in the **Search My Investments** field or choose it from the five most recently visited investments.
3. Click the **Allocate Funds** tab.
4. Select a working period and click **Apply**.
5. Select an investment from the **Allocate Funds** grid.
6. Click the **Allocate Funds** drop-down list and select **Reject**.
7. **Optional:** Select an investment, and click **Clear** from the**Allocate Funds** drop-down list to remove the planning state funding requests that are for past funding periods or non-editable funding periods from your list.

Review the use of your funds

Review the flow of your funds from your investment to other investments to make an informed decision when you allocate or request funds.

Before you begin

Role required: sn_invst_pln_v2.investment_user

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About this task

Reviewing the use of your funds enables you to see when an investment has not used funds, or whether the funds are still meeting the priorities of your business goals.

Note:
The actual amount in your investment is the sum of the direct spends you entered and the total from all investments to which you had allocated funds. The correct actual amount is reflected only if the owners of those investments have entered the actual spends in their investments.

You can view the difference between funds received and actuals (underspent or overspent amount) in the tree view cards. If the funds received amount is greater than the amount in the fund, the underspent amount is displayed in green. If the funds received amount is lesser than the amount in the fund, the overspent amount is displayed in red.

You can configure which information should be displayed on the cards in the list view of **Allocate Funds** or **View/Request Funds**. For example, you can configure the list view to display only the **Total Actuals** amount.

Users that the investment owner adds in the **Viewable by** field can also review the investment details. The owner of an investment that funds a particular investment is automatically added to the field list for that investment. For example, if a program investment receives funds from a portfolio investment, then the owner of the portfolio investment is added to the **Viewable by** field for the program investment.

Procedure

1. Navigate to **All** > **Investment Funding** > **My Funds**.
2. Click an investment card to open an active investment to review fund allocations.

   If you want to open a different investment, access the drop-down menu next to the name of the currently displayed investment. Either search for another investment by entering its name in the **Search My Investments** field or choose it from the five most recently visited investments.
3. On the **Allocate Funds** tab, click the tree view icon ( ).
   Your investment and the investments that you funded directly display as cards in a hierarchical view. The number of child investments is displayed in the parent investment card. If there are more than 10 investment cards, you can access a compact card view.
4. Click an investment to view its fund allocation to other investments.

   As you drill down to child investment cards, the clickable menu in the top-right corner displays the current level of the hierarchy.
5. **Optional:** Click the **Actions** menu and select **View Investment** to navigate to the investment grid.

View past funding details

View the past funding details of your investments.

Before you begin

Role required: sn_invst_pln_v2.investment_user

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Procedure

1. Navigate to **All** > **Investment Funding** > **My Funds**.
2. Click an investment card to open the investment for which you want to view the past funding details.

   If you want to open a different investment, access the drop-down menu next to the name of the currently displayed investment. Either search for another investment by entering its name in the **Search My Investments** field or choose it from the five most recently visited investments.
3. Click the **Allocate Funds** tab.
4. Right-click on a column on the grid, and select **View Past Funding Details** to view the funding details of your investments for past fiscal periods.

   If you are not the owner of the investment but have been added in the **Viewable by** field of the investment, you can view the investments in read-only mode.

   The graph displays the comparison between the total funds received and the total actuals for the fiscal periods in the past one year.

Domain separation and Investment Funding

Domain separation is supported in Investment Funding. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

Handling domain separation for Financials in Workspace

Defining funding entity is an important configuration to create Investment Object (IO) for any entity. The accessibility of the Funding entity definition configuration record is important to determine whether IO can be created for the entity. Let's consider example of Project as entity. Similar process is applicable for any entities configured through Funding Entity definition.

1. Define funding entity in Global domain.

   This helps users to access projects from any specific domain or global domain.
2. If a project is required to access from a specific domain to meet your organization requirements, define the funding entities in that specific domain only.
3. Always create Investment Object in the same domain of the respective Project's domain.

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When a user in a parent domain accesses the financials of a project in a child domain, the system creates the investment object in the child domain. This ensures that users in the child domain can access the financials and the investment object.

Related topics

Domain separation for service providers

Export to PowerPoint for Strategic Portfolio Management

The ServiceNow® Export to PowerPoint for Strategic Portfolio Management add-in helps you to generate and download project status reports from your instance as a Microsoft PowerPoint file. You can use this file to share it across the stakeholders or teams for collaboration.

Export to PowerPoint overview

Export to PowerPoint overview video. Approximately two minutes long.

Get started

Explore  Learn about Export to PowerPoint add-in features.	Configure  Install and configure the Export to PowerPoint add-in.
Use  Use Export to PowerPoint to generate and download your project status report.	Reference  Get details about components installed, form fields, tables, roles, and general guidelines.

Important:

- For more information about the data processing required to generate a project status report within the ServiceNow servers based on your location, see the KB1170323 article in the Now Support Knowledge Base.
- Export to PowerPoint is currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. Please check for availability updates in future releases.

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Troubleshoot and get help

- Ask or answer questions in the Strategic Portfolio Management forum on the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Export to PowerPoint

The Export to PowerPoint application helps you generate and download your project status report. Use this file to present your project status report to stakeholders or teams for collaboration and to identify the next steps.

Use the following data types to create a Microsoft PowerPoint template.

Report template types

Report type	Description
Text	Generates a text format report.
Table	Generates a table format report.
Line	Generates a line chart report.
Bar	Generates a bar graph report.
Repeater	A token used to generate data for all the entries in a record by retaining the template format.

Configuring Export to PowerPoint

Learn about the process and prerequisites used to install the Export to PowerPoint application in your instance and configure it in Microsoft PowerPoint.

Configuration workflow

Use the following steps as guidelines to configure and install the ServiceNow add-in for Microsoft PowerPoint after you download the Export to PowerPoint application from the ServiceNow Store.

1. Install Export to PowerPoint for Strategic Portfolio Management from the ServiceNow Store. For more information, see Install Export to PowerPoint for Strategic Portfolio Management.
2. Manage the related tables and scripted elements components. For more information, see Manage Related Tables and Scripted Elements forms.

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3. Download the manifest file from your instance to and share it with your Microsoft Office 365 account manager. For more information, see Download the manifest file from your instance.
4. Configure the Export to PowerPoint add-in for your Microsoft PowerPoint. For more information, see Configure the Export to PowerPoint add-in for Microsoft PowerPoint.

Install Export to PowerPoint for Strategic Portfolio Management

You can install the Export to PowerPoint for Strategic Portfolio Management application (sn_ppt) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins, if they are not already installed.

Before you begin

- Review the application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- Role required: admin
- **Important:**
  For more information about the data processing required to generate a project status report within the ServiceNow servers based on your location, see the KB1170323 article in the Now Support Knowledge Base.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Export to PowerPoint for Strategic Portfolio Management application (sn_ppm_ppt_export) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Result

The following components are installed with installation of the Export to PowerPoint for Strategic Portfolio Management application.

- Roles
- Tables

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See Components installed with Export to PowerPoint for Strategic Portfolio Management for more information.

Manage Related Tables and Scripted Elements forms

Manage the **Related Tables** and **Scripted Elements** components that are required to create a Microsoft PowerPoint template.

Before you begin

Role required: sn_ppt_export.ppt_admin

Procedure

1. Navigate to **All** > **PowerPoint Management** > **PowerPoint Report Types**.
2. Select a parent table record, for example, Project report `pm_project`.

Option	Description
To manage Related Tables	You can add a custom remote table or a child from the parent table. **a.** In the **Related Tables** related list, select **New**. On the Related tables form, fill the fields. For a description of the field values, see Related Tables form. **b.** To add a custom remote table: **i.** [redacted] **ii.** Select the required remote table from list. **iii.** Select the **Enable custom script** option. **iv.** In the Custom script box, write the code to establish a connection between the remote table and main table. **c.** To select a child table from the main table: **i.** Select a child table from list. **ii.** Set the **Parent relation column** to the field that links the child table to the parent table. **d.** Select **Submit**. The selected table and its relation to the parent table is displayed in the Related tables section.
To manage Scripted Elements	**a.** In the **Scripted Elements** component, select **New**. **b.** On Scripted Elements form, fill the fields. For a description of the field values, see Scripted Elements form. **c.** Select **Submit**.

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3. To configure a **Script** component, specify the script logic to generate dynamic content in the template.

   Script components allow you to include calculated or dynamically generated content in your PowerPoint template. Use scripts when the built-in Field, Table, or Text component types do not meet your requirements.

   Example: To display a formatted project health status:

```
(function() {
                  var gr = new GlideRecord('pm_project');
                  gr.get(current.getValue('sys_id'));
                  var health = gr.getValue('health');
                  if (health == 'green') return 'On Track';
                  else if (health == 'yellow') return 'At
 Risk';
                  else return 'Off Track';
                  })()
```

   Note:
   Verify the available scripting API and context variables with your ServiceNow administrator. Script components execute server-side and have access to the current record context.

4. Select **Update**.

Download the manifest file

Configure the user roles and download the add-in manifest file to use the Export to PowerPoint add-in for Microsoft PowerPoint.

Before you begin

Role required: sn_ppt_export.ppt_admin

Procedure

1. Navigate to **All** > **ServiceNow Add-Ins for Office** > **Office Add-In Manifests**.
2. Click **Templates for ServiceNow**.

   Note:
   Check the **Templates for ServiceNow** description to match with **PowerPoint plugin for ServiceNow** to ensure that the correct manifest file is selected.

3. Click **Download Manifest** to download the add-in file.
   The manifest file you download is specific to your instance. It contains the instance URL and configuration details that apply only to your environment. Using a manifest from one instance on another instance does not work and may cause errors.

   If you work with more than one ServiceNow instance, for example, a development instance and a production instance — you have two options:

   - Install a separate manifest for each instance. Download and install the manifest individually from each instance you need to connect to.
   - Use the sideload option. If installing multiple manifests is not practical, use the sideload option to temporarily load the manifest for a different instance without installing it permanently.

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What to do next

- Share the `manifest.xml` file with Microsoft Office 365 account manager to upload the manifest file for Microsoft Office 365 users to enable the Export to PowerPoint add-in for Microsoft PowerPoint.

  Alternatively, you can sideload the add-in for testing purposes using one of the following processes.

  - For Windows machines: https://learn.microsoft.com/en-us/office/dev/add-ins/testing/create-a-network-shared-folder-catalog-for-task-pane-and-content-add-ins
  - For macOS machines: https://learn.microsoft.com/en-us/office/dev/add-ins/testing/sideload-an-office-add-in-on-mac
- For more information about the additional configuration steps required to enable the Export to PowerPoint add-in for browser version of Microsoft PowerPoint, see the KB1171422 article in the Now Support Knowledge Base.

Configure the Export to PowerPoint add-in for Microsoft PowerPoint

Configure the Export to PowerPoint add-in in your Microsoft PowerPoint to interact with your instance and fetch the data required to generate and download your project status reports.

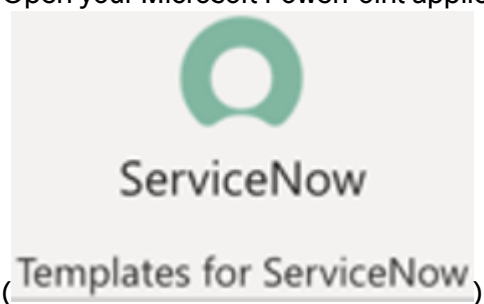
Before you begin

- Role required: sn_ppt_export.ppt_admin or sn_ppt_export.ppt_user.
- The Export to PowerPoint add-in must be deployed to your Microsoft PowerPoint. If the add-in icon does not appear on the Home tab, verify the following.
  1. Download the add-in manifest file from your ServiceNow instance.
  2. Contact your Microsoft Office 365 administrator to deploy the manifest using the Microsoft 365 admin center (**Settings** > **Integrated apps** > **Upload custom apps**).
  3. After deployment, restart Microsoft PowerPoint and verify the ServiceNow add-in icon appears on the Home tab.
- For the Export to PowerPoint plugin configuration on your instance, see Configure the Export to PPT plugin.

Tip:

If you do not see the add-in icon after deployment, check **Insert** > **My Add-ins** in Microsoft PowerPoint to verify the add-in is installed. You may need to select it manually to add it to your ribbon.

Procedure

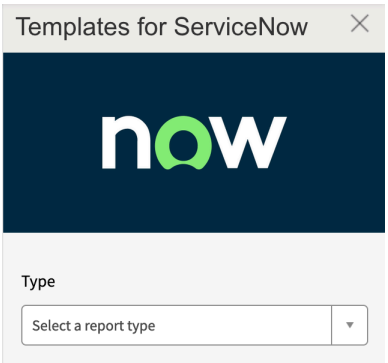
1. Open your Microsoft PowerPoint application and select the ServiceNow add-in icon (

) on the **Home** tab.
   A panel appears with a login option to access your ServiceNow instance.
2. Select **Log in**.

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3. Enter your ServiceNow instance credentials and select **Log in**.
   A prompt requesting access to your instance with details such as the instance name is displayed.
4. Check your instance details and select **Allow**.

Result
The landing page of the add-in appears as the right panel.



Note:
For more information about the additional configuration steps required to enable the Export to PowerPoint add-in for the browser version of Microsoft PowerPoint, see the KB1171422 article in the Now Support Knowledge Base.

What to do next
Create a Microsoft PowerPoint template.

Using Export to PowerPoint

Use the Export to PowerPoint add-in for Microsoft PowerPoint to create a template to generate reports.

Note:
While creating a template, any formatting options that you use such as font style, font size, background color, and so on, are retained while generating a report.

1. Create a Microsoft PowerPoint template. For more information, see Create a Microsoft PowerPoint template.
2. Upload a Microsoft PowerPoint template to your ServiceNow instance. For more information, see Upload your Microsoft PowerPoint template.
3. Download a project status report using the created template. For more information, see Download a project status report.

Create a Microsoft PowerPoint template

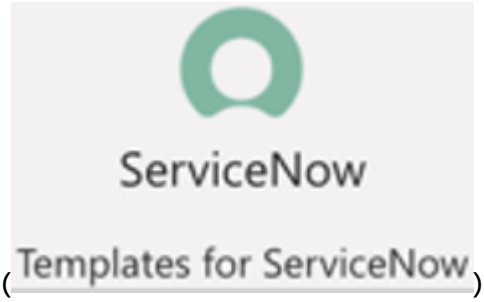
Configure the Export to PowerPoint add-in in your Microsoft PowerPoint to interact with your instance and fetch the data required to generate and download your status reports. Create your own custom template with the required data to generate a report, based on the reporting needs of your organization.

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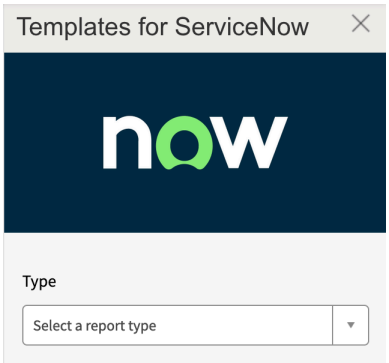
Before you begin

- Let us connect your instance to the Microsoft PowerPoint using the add-in login and create a template Portfolio Planning to generate a report for epic details.
- Role required: sn_ppt_export.ppt_user

Procedure

1. Open your Microsoft PowerPoint application and select the ServiceNow add-in icon (

) on the **Home** tab.
A side panel appears with a login option to access your ServiceNow instance.
2. Select **Log in**.
3. Enter your ServiceNow instance credentials and select **Log in**.
A prompt with your instance details is displayed.
4. Check your instance details and select **Allow**.
The landing page of the add-in appears on the side panel.



5. Select **Personal portfolio report** from the Type list.

   Select the data type you want to populate.

   - Text – Text entries from the parent table. Example: Portfolio name, owner name, and so on.
   - Table – Table entries mapped using related tables.
   - Repeater – To populate additional details for each of the selected records.
   - Line and Bar chart – Graph entries mapped using scripted elements.

   Note:
   While creating a template, you can:
   - Change the font size and color for the token values to reflect the same in your status report.
   - Move around the token to place them in a required format.
   - Add your custom or organization logos on the slides.
   - Resize the chart tokens according to the requirement.

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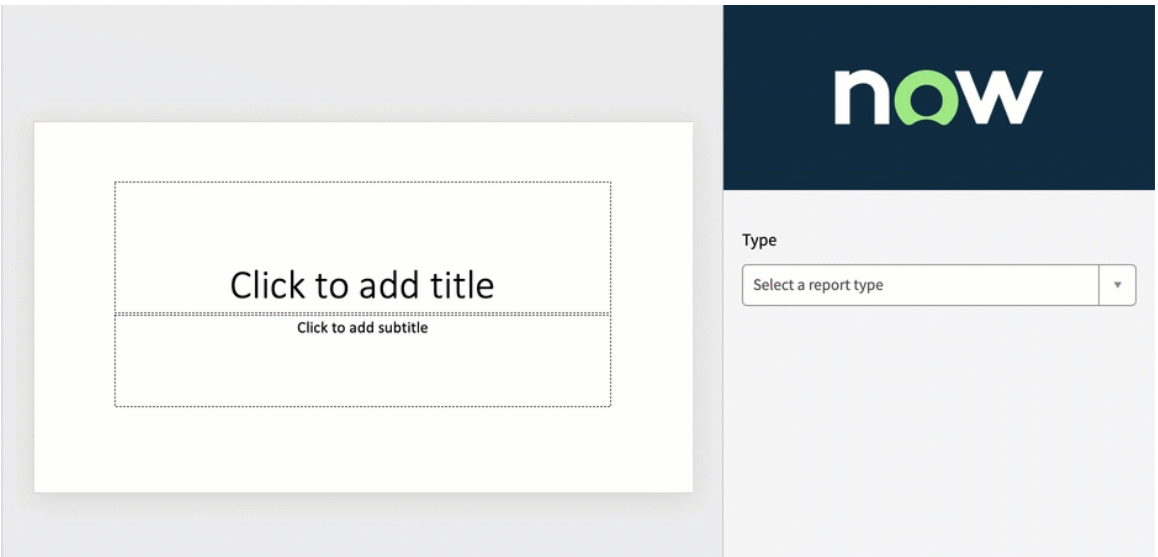
You can customize data retrieval for template tokens by appending link attributes. The following attributes are available:

Template token link attributes

Attribute	Description	Example
orderByColumnName	Sorts the data by the specified column name in ascending or descending order.	`orderByColumnName=priority^orderBy`
filterQuery	Applies an encoded query to filter the data populated in the template token.	`filterQuery=state=2^priority=1`
maxRows	Limits the maximum number of rows returned for a table or repeater token.	`maxRows=10`

Apply these attributes by appending them to the token URL in the template field properties. For details on configuring related tables and scripted elements, see Manage components.

6. To populate the Portfolio name on the first slide:
   a. Select **Text** from the data type.
   b. Filter the Column list to locate Name and select it. A token value representing the portfolio name is generated in the subsequent empty text box.
   c. Select the **Copy text** button to copy the token.
   d. Paste the token on the slide.



Add a new slide to Microsoft PowerPoint, insert a table with three columns and two rows to generate the Epics with their numbers, status, and due date.

7. To populate Epics details such as numbers, status, and due date:
   a. From the add-in landing page, select **Table** from the Data list.

      Use the **Back** (Back) button to go back to the add-in landing page.

   b. Select **Epic** from the Related table list.

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c. From the Related table (optional) list, select a related table to the Epic.

d. Select the number of rows that you want to populate and By default, five rows are selected.

You can select a minimum of one row and a maximum of 10 rows.

e. Use the filter icon to see any existing filter or to define a condition to populate the data.

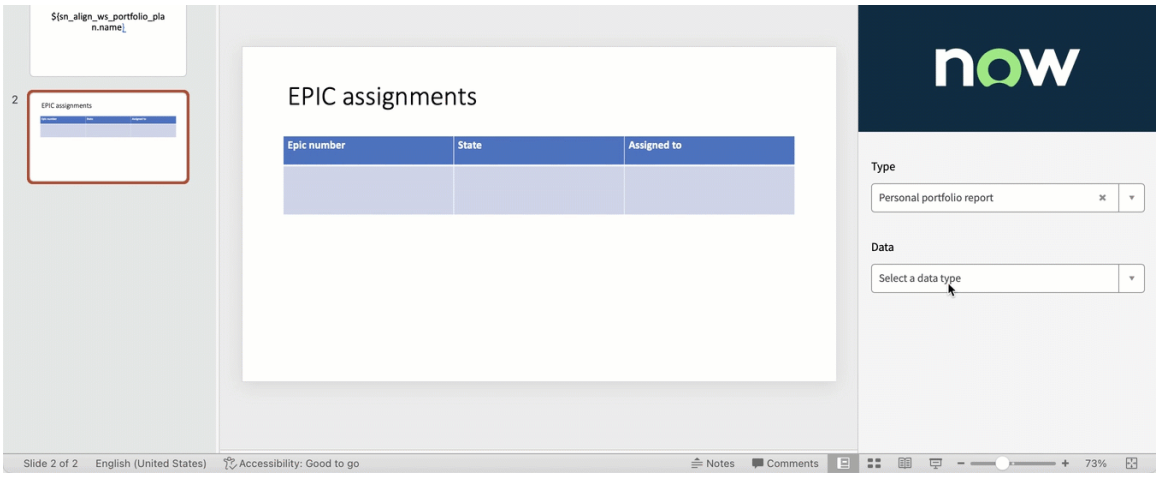
Here, we're picking Epics which are in either Ready or Work in progress state with a deadline on April 30.

f. Select **Next**.

g. Select **Number** from the Column list.

h. Copy the token value and paste it in the table.

i. Similarly, copy and paste the token values of **State** and **Assigned to** fields from the Column list.



Add slide to Microsoft PowerPoint.

8. To populate the required details of each of the selected records:

a. From the add-in landing page, select **Table** from the Data list.

Use the **Back** (← Back) button to go back to the add-in landing page.

b. Select **Repeater** from the Data list.

c. Select **Epic** from the Related table list.

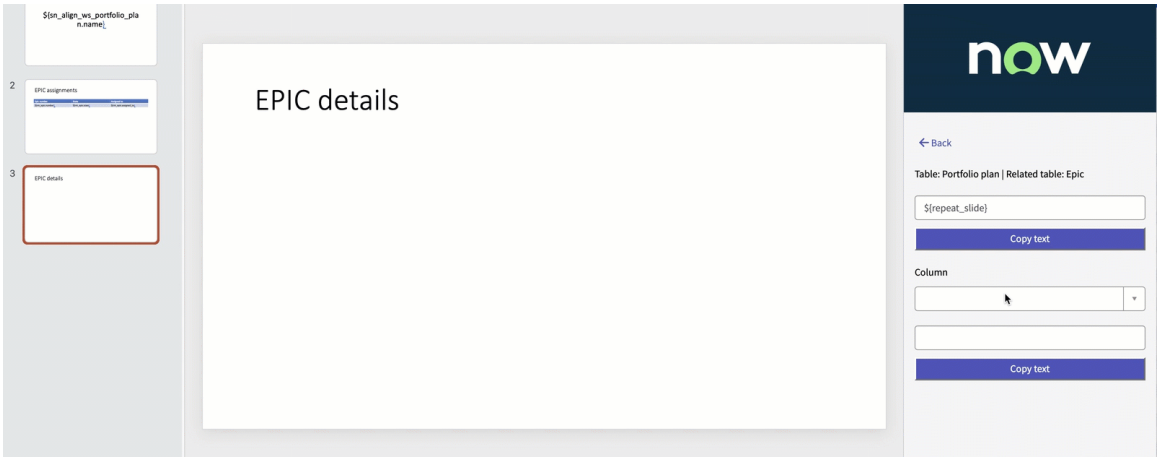
d. Add the required filter using the filter option and select **Next**.

e. Select the required fields to copy and paste the token on the slide.

f. Copy and paste the repeater token to the slide

Note:
The repeater token doesn't generate any values in the status report.

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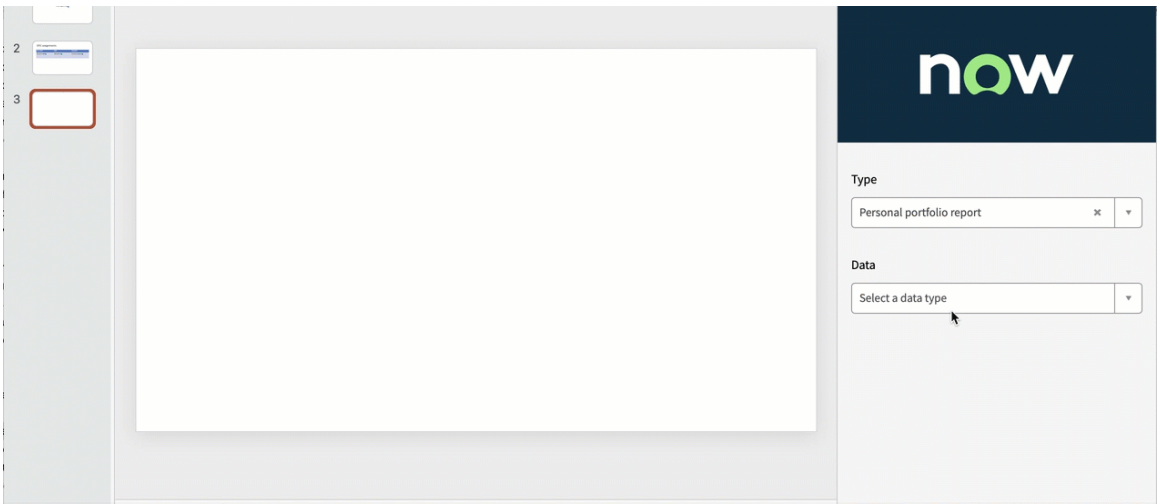


Add a new slide to Microsoft PowerPoint.

9. To populate a line or bar chart:
   a. From the add-in landing page, select **Line Chart** or **Bar Chart** from the Data list.

      Use the **Back** (Back) button to go back to the add-in landing page.

   b. From the Select a chart (defined using scripted elements) list, select a chart you want to populate for your report and select **Next**.
   c. Select the **Copy to clipboard** button to copy the chart token.
   d. Paste the token on a slide.



10. Save the Microsoft PowerPoint file in the `.pptx` format with a maximum of 50 slides and file size not exceeding 15 MB.

> **Note:**
> The Export to PowerPoint for Strategic Portfolio Management application comes with default templates which you can use to generate reports and consider as a reference to create templates.

Upload your Microsoft PowerPoint template

Upload the latest template to your instance to generate and download the status report as a Microsoft PowerPoint file.

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Before you begin
Role required: sn_ppt_export.ppt_user

Procedure

1. Navigate to **All** > **PowerPoint Management** > **PowerPoint Templates**.
2. Select a record to attached the latest template.
3. Select the manage attachments icon ( ).
4. Select **Choose file** to browse and upload the template.

   Note:
   You can use only one template (. `pptx`) at a time with a maximum file size of 15 MB. Delete the existing template to upload and use a new one.

5. Close the dialog box, and select **Update** on the form.

What to do next
Download a project status report.

Download a project status report

Download your projects and project status reports as a Microsoft PowerPoint file to share it with the stakeholders.

Before you begin
Role required: sn_ppt_export.ppt_user

Important:
Export to PowerPoint is currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. Please check for availability updates in future releases.

Procedure

1. To download your status report for Enterprise Architecture (formerlyApplication Portfolio Management), see Export data to Microsoft PowerPoint.
2. To download your status report for Project Workspace, see Export a project status report to Microsoft PowerPoint from Project Workspace.
3. To download your project from Project Workspace, see Export a project from Project Workspace.
4. To download your status report for Strategic Planning, see Export the portfolio plan status or roadmap to Microsoft PowerPoint.
5. To download your status report for Portfolio Planning, see Export the portfolio plan status or roadmap to Microsoft PowerPoint from Portfolio Planning Workspace.

Result
Your report is downloaded as a Microsoft PowerPoint file with the project number and status report date as the file name.

Export to PowerPoint Reference

Reference topics provide additional details about Export to PowerPoint such as fields, tables, roles, and some guidelines.

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Components installed with Export to PowerPoint for Strategic Portfolio Management

Several types of components are installed with activation of the Export to PowerPoint for Strategic Portfolio Management (sn_ppt) add-in, including user roles and tables.

Roles installed

Role title [name]	Description	Contains roles
Export to PowerPoint for Strategic Portfolio Management admin [sn_ppt_export.ppt_admin]	• Create, edit, and manage the attributes required to generate Microsoft PowerPoint templates. • Assign this role in confidence because it is a high security role for the Export to PowerPoint application with access to modify the source code for Scripted Elements.	sn_ppt_export.ppt_user
Export to PowerPoint for Strategic Portfolio Management user [sn_ppt_export.ppt_user]	• Create a template, upload it to the ServiceNow instance, generate, and download the project status report. • By default, users with the project_user role are assigned this role.	None

Tables installed

Table	Description
PowerPoint Cell Formatter [sn_ppt_export_ppt_cell_formatter]	Stores the color properties for text, text background, table cell, and shape fill.
PowerPoint Element [sn_ppt_export_ppt_element]	Stores the required elements to generate aMicrosoft PowerPoint template.
PowerPoint Formatter [sn_ppt_export_ppt_formatter]	Stores the text formatting options.
PowerPoint Formatter Mapping [sn_ppt_export_ppt_formatter_mapping]	Stores the format mapping for the tokens.
PowerPoint Report Type	Stores report types that can be used to generate a report.

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Table	Description
[sn_ppt_export_ppt_report_type]	
PowerPoint Template [sn_ppt_export_ppt_template]	Stores the metadata required for the templates.
PPT Service Request Log [sn_ppt_export_ppt_poi_service_request_log]	Stores service requests logs.
Related Table [sn_ppt_export_ppt_related_table]	Stores related tables for a report.
Scripted Element [sn_ppt_export_ppt_scripted_element]	Stores the supported chart types, such as line chart and bar chart.

Default templates installed

Template name	Description and use case	Data included
Project Report Template - Default	A comprehensive project report template designed for detailed project reviews. Use this template for in-depth project status meetings with project teams and stakeholders.	Project details, task breakdown, milestone status, resource allocations
Project Status Report Template - default	A concise executive summary template designed for high-level status updates. Use this template for portfolio reviews, steering committee meetings, and executive dashboards.	Project overview, key metrics, status indicators, high-level timeline

Tip:

To view and manage all available templates, navigate to **All** > **PowerPoint Management** > **PowerPoint Templates**.

Related Tables form

Use the Related Tables form to define the child tables for the configured parent table. This Related Tables helps in fetching data to export the project status report as Microsoft PowerPoint.

Related table form

Field	Description
Name	Name of the child table to include in the export.
Parent relation column	The column that defines the relationship between the parent and child tables. This field determines how the child table data is joined to the parent record.

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Related table form (continued)

Field	Description
	For more information on how to manage Related Tables, see Manage Related Tables and Scripted Elements forms.
Enable custom script	Select this option to enable custom scripting for the related table data. When enabled, you can write server-side JavaScript to customize how child table data is fetched, filtered, or transformed before it is included in the PowerPoint export. **Important:** Custom scripts run with the permissions of the current user. Test scripts thoroughly on a non-production instance before deploying to production.
Advanced	Expand this section to access advanced configuration options for controlling how the related table data is rendered in the PowerPoint export, including field mappings, sort order, and display formatting.

Scripted Elements form

Use the Scripted Elements form to define the data script to fetch data for a complex report type such as line chart or bar chart.

Scripted Elements form

Field	Description
Name	Name for the element.
Type	Chart type (Line chart or Bar chart) that you want to generate. After the required chart type is selected, the suggested format of the scripted elements code format is displayed in the **Data Script** field.
Description	Description for the report. (Example: Comparison of planned vs. Actual costs.)
Data Script	Script used to fetch data for the report. For more information on how to manage Scripted Elements, see Manage Related Tables and Scripted Elements forms.

Line chart parameter

Following are the basic parameters used to define the properties and formatting of a line chart.

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Line chart parameters

Parameter	Description	Reference value
`@property {String} seriesArray.properties.color - Color of Line`	Color of the line.	Use Hex code values to define a color of the line. For example, use the hex code `#FF0000` for red color.
`@property {String} seriesArray.properties.type - type of Line`	Type of line.	For more information about reference line formats, see https://poi.apache.org/apidocs/dev/org/apache/poi/xddf/usermodel/PresetLineDash.html#DASH.
`@property {String} seriesArray.properties.markerStyle - style of marker`	Style of the marker to identify key points on the chart.	For more information about reference marker formats, see https://poi.apache.org/apidocs/dev/org/apache/poi/xddf/usermodel/chart/MarkerStyle.html.
`@property {Number} seriesArray.properties.markerSize - size of style`	Size of the marker on the chart.	Minimum inclusive: 2, maximum inclusive: 72
`@property {String} legendPosition - Position of legend in chart. This is optional`	Legend position of the chart.	For more information about legend position, see https://poi.apache.org/apidocs/dev/org/apache/poi/xddf/usermodel/chart/LegendPosition.html.

Bar chart parameters

Following are the basic parameters used to define the properties and formatting of a bar chart.

bar chart parameters

Parameter	Description	Reference value
`@property {String} barProperties.direction`	The direction of plotting the bars in the chart.	For more information about defining a bar direction, see https://poi.apache.org/apidocs/dev/org/apache/poi/xddf/usermodel/chart/BarDirection.html.

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bar chart parameters (continued)

Parameter	Description	Reference value
`@property {String} barProperties.grouping - grouping of bars`	Grouping style of the bar in the chart.	Use options such as standard, clustered, stack. For more information about bar grouping properties, see https://poi.apache.org/apidocs/dev/org/apache/poi/xddf/usermodel/chart/BarGrouping.html.
`@property {Number} barProperties.overlay`	Size of overlapping among the bars in the chart.	Accepted numeric value range is from 0 to 100.

Agile Development 2.0

ServiceNow Agile Development 2.0 provides an agile software development environment for product-based or project-based efforts, using the Scrum framework. Implement a pure agile approach over the entire life cycle of a product, or a hybrid approach using agile methods within a traditional project structure.

This video provides an introduction to development in the ServiceNow SPM Agile 2.0 application including creating stories, planning backlogs and sprints, and tracking progress

Get started

Explore	Set up	Integrate
Learn the key features and business value that Agile Development 2.0 offers	Activate the required plugins, migrate data from Agile Development 1.0, and verify custom configuration settings	Integrate Agile Development with third-party execution systems

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Use	Reference	
		
Learn how to manage your product development with Agile Development 2.0	Get details about components, form fields, and general guidelines	

Troubleshoot and get help

- Ask or answer questions in the Strategic Portfolio Management forum on the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support
- Enhance your learning with courses from developer training
- Refer to the developer documentation
- Find the Strategic Portfolio Management package that works best for you

Exploring Agile Development 2.0

Learn about the Scrum methodology framework, typical activities, and artifacts that are used in ServiceNow® Agile Development 2.0.

Overview of product based and project based approaches inAgile Development 2.0. Approximately three minutes long.

Agile Development 2.0 supports both product-based and project-based development efforts. For a quick overview of these approaches, watch the video.

Use the information in the following sections for a deeper understanding of Agile Development basics, its process, and the scenarios in which Agile Development is used. Also, learn about the features of the Agile Development 2.0 application.

Basics of Agile Development

Scrum is one of the popular methodologies of Agile Development, which includes a fixed sprint schedule and regular requirements testing. These activities are performed by common roles such as product owner, scrum master, and group members. Learn about the basics of Agile Development process.

Scrum framework

Familiarize yourself with the terminology and artifacts used in Agile Development.

Assignment group or Agile team

Group of users who are involved in working on and completing the development for an Agile product. In Agile Development 2.0, this team is called as an assignment group.

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In an assignment group, a user is designated as the scrum master, who is responsible to ensure that all the scrum activities are properly performed for a release. For more information, see Assignment groups in Agile Development 2.0.

Epic

High-level definition of a requirement that provides value to the business, such as a new feature or a significant enhancement. Epics are broken down into Agile stories and can be worked on by a single or multiple teams.

Story

Short, manageable pieces of work that are related to an epic. Stories capture the who, what, and why of a requirement in a simple and concise way. Using the description and criteria mentioned in the stories, teams can accurately estimate the effort required to implement the work in it.

Scrum task

Distinct tasks that are required to complete a story. A task might require from 4 through 12 hours to complete.

Backlog

List of work that must be implemented, as part of achieving specific outcomes. Backlog contains work related to new features, enhancements to existing features, and other activities of product development.

Backlog is considered as the single source of work for a product or team. Anything that is not included in the backlog would not be prioritized for development.

Personal Backlog

Product owners define a personalized work pipeline called personal backlog, by applying relevant filter criteria. In Agile Development 2.0, product owners can define as many personalized backlogs as necessary. The criteria used to create the personalized backlog is flexible and can be modified at any time.

Sprints

Short, fixed periods, in which team members pick and complete a set number of stories. These short, time-boxed cycles provide the teams the flexibility to adapt to changing priorities.

The cadence of recurrence for a sprint is decided by the development teams and the product owners. For example, a 10-day sprint, or a 1-week sprint.

Sprint backlog

Scope of work for a sprint. Product owners and their development teams use the sprint planning activity to review their backlog and decide on the stories to be picked up for a sprint.

Theme

Area of focus with an associated business value. A theme is related to one or more of the company's goals. Themes help you prioritize your work at a high level and can be associated with multiple epics.

Product

Entity to organize themes, epics, and stories of similar functionality into a single context. A product represents an item or a feature that is to be developed and released to the market.

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Release

A release has a start and end date during which several development iterations are completed. Releases are created by a product owner and contain user stories, sometimes from multiple products and can also involve multiple teams. The stories associated to a release form its release backlog.

> **Note:**
> In Agile Development 2.0, ensure that you create a product before you create themes, epics, or stories. You cannot submit these records without attaching them to a product.

After creating stories and scrum tasks for your products, you can create a personalized backlog containing the stories from one or more of these products.

Defects

Defects can be used to report and track the resolution of issues that are noticed during the development of a new feature, or as a feedback for existing features. Product owners then review these defects and decides on creating stories for them, which are assigned to the relevant assignment groups.

Using the Agile Development — Unified Backlog, you can set up a triage board to maintain a centralized backlog for records of different task types, such as defects, stories, and enhancements. For more information, see Agile Development — Unified Backlog.

Enhancements

Enhancement requests can be used to log feature enhancements for a product. These requests can arise from internal requirements or customer feedback. Product owners review these logged requests and decides on creating stories for them based on priority. These stories are then assigned to the relevant assignment groups for development.

Using the Agile Development — Unified Backlog, you can set up a triage board to maintain a centralized backlog for records of different task types, such as defects, stories, and enhancements. For more information, see Agile Development — Unified Backlog.

Scrum activities

The Scrum process usually consists of the following activities.

Sprint planning

Assignment group members meet to decide on the stories that they can commit to deliver in the sprint. Typically, they commit to the top ranked stories first. The group decides which scrum tasks are necessary for each story. The product owner should be present to answer any questions.

Daily standup

Assignment group members meet to discuss the progress of their work from the previous day, work planned for the current day, and any blockers. The daily standup keeps the group members focused on completing the stories for the current sprint and informs the scrum master of any blockers.

At the end of the sprint, all its stories should be complete. Any incomplete stories are moved back into the backlog, or a future sprint.

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Sprint reviews

Sprint review meetings are held at the end of each sprint. In these meetings, the assignment group reviews the work that they completed and demonstrate the newly developed features to their product owner.

Sprint retrospectives

A retrospective meeting is conducted at the end of each sprint, to facilitate discussion between the group members on what went well and what did not. The goal of a sprint retrospective is to discuss ways to improve the execution of future sprints.

For details on how Agile Development 2.0 can help you manage your efforts of product development, see Agile Development process flow.

Scrum reports

Scrum reports help you analyze the performance and progress of your agile team. These reports can be related to an epic, sprint or release, and provide historical data of your team's work velocity. Performance Analytics Content Pack for Agile 2.0 provides pre-configured dashboards with data visualizations to help you improve your Agile practices.

For more information, see Performance Analytics Content Pack for Agile 2.0.

Agile Development process flow

Learn the process that is used to manage product development efforts in Agile Development 2.0, such as creating a product or tracking a sprint or release.

Note:
The flow explained here represents the common practice for managing agile development efforts using the functionality available in the Agile Development 2.0 application. This flow does not represent the only possible process.

Define products

A product can be a set of features or functionality offered to users. Each product can have an owner that maintains the work pipeline, such as epics and stories, for the product. These work items can be associated to a theme, which is related with a business goal.

See Create a product in Agile Development 2.0.

Create epics and stories

Epics contain high-level requirements for your products, which you can use to break down into manageable stories. While creating epics and stories in Agile Development 2.0, you can associate them with a product.

See Create an epic in Agile Development 2.0 and Create a story in Agile Development 2.0.

Create releases

Some organizations have a fixed time frame to make their products available to the market, which is referred to as a release. A release has a start and end date, during which several development iterations are completed. For example, you can have quarterly or half-yearly schedules to release new applications or enhancements to existing applications.

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After you create a release in Agile Development 2.0, you can associate products, epics, and stories to it. See Create a release in Agile Development 2.0.

Create personalized backlogs

A personalized backlog can be created by defining filter criteria. For example, one personalized backlog can be a combination of stories, defects, and incidents while the other personalized backlog can be a combination of stories and incidents. In this way, you can create as many personalized backlogs as necessary.

See Create a personalized backlog in Agile Development 2.0

Create assignment groups

Create an assignment group add members to it. For each group member, define the number of story points that they can complete in a sprint. At the group level, the sum of the story points of all the group members determines the group capacity.

See Create an assignment group in Agile Development 2.0

Create sprints

A sprint is the time frame in which the development team delivers one or more stories. A sprint can be of any length, but typically takes between one and four weeks to finish. The scrum master creates the number of sprints required for the group, and these sprints are used by the group members to complete the work required for an upcoming release. However, all sprints within a release must be within the release start and end dates.

Plan sprint activities

Before a sprint starts, the group and scrum master decide on what stories from the backlog they can commit to complete within a sprint. Stories for a sprint can be selected based on priority. The scrum master must ensure that the effort (total story points) required to complete the stories matches the capacity of the group.

While planning your sprints, you can use the velocity reports as guidance to estimate how much work the group can complete in the next sprint. The Agile 2.0 Team dashboard provides Velocity history report and Velocity by type report.

- Velocity History: Gain an insight on the overall velocity of the team for the past 10 sprints. Analyze if the team is achieving a stable, predictable velocity, and is meeting the commitments.
- Velocity by Type: Analyze the way your team's velocity changes over time and compare the team's strategic workload with operational or other types of workload.

For more information on how to plan your sprints, see Plan your sprint activities in Agile Development 2.0.

Track sprint progress

The scrum master manages the sprint team efforts, provides progress reports, and removes any blockers that the team encounters. Team members update story records and conduct daily standup meetings to discuss their progress and communicate the concerns to the scrum master and product owners.

The team is expected to complete all the stories that are committed for a sprint. The scrum master expects that the stories are fully tested and are ready for release, according to the acceptance criteria.

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Ideally, the committed stories and the scope for a specific sprint should not change while the sprint is in progress. Agile Development 2.0 provides the flexibility to update as necessary and adapt to changing priorities. However, stories must be added or removed from a sprint only after a discussion between the group, scrum master, and product owner.

You can use the Agile 2.0 Sprint dashboard with reports such as burnup and burndown charts to track the progress of the team for a sprint.

Tip:

If you're running a hybrid or traditional project delivery, you can still use the Agile 2.0 Sprint dashboard to track workflow state transitions using the cumulative flow diagram. For more information about enabling dashboard access, see Performance Analytics Content Pack for Agile 2.0.

Track release progress

The product owner tracks the progress of the release and verifies whether the team is completing stories in the pace that is necessary to achieve the release goal.

You can use the Agile 2.0 Release dashboard with reports such as burnup, burndown, and cycle time charts to track the progress of the team for a release.

Note:
All Agile 2.0 dashboards are available with Performance Analytics Content Pack for Agile 2.0.

Agile Development use cases

Learn the different methods that organizations could use to plan their backlog and deliver stories.

Some common delivery methods are:

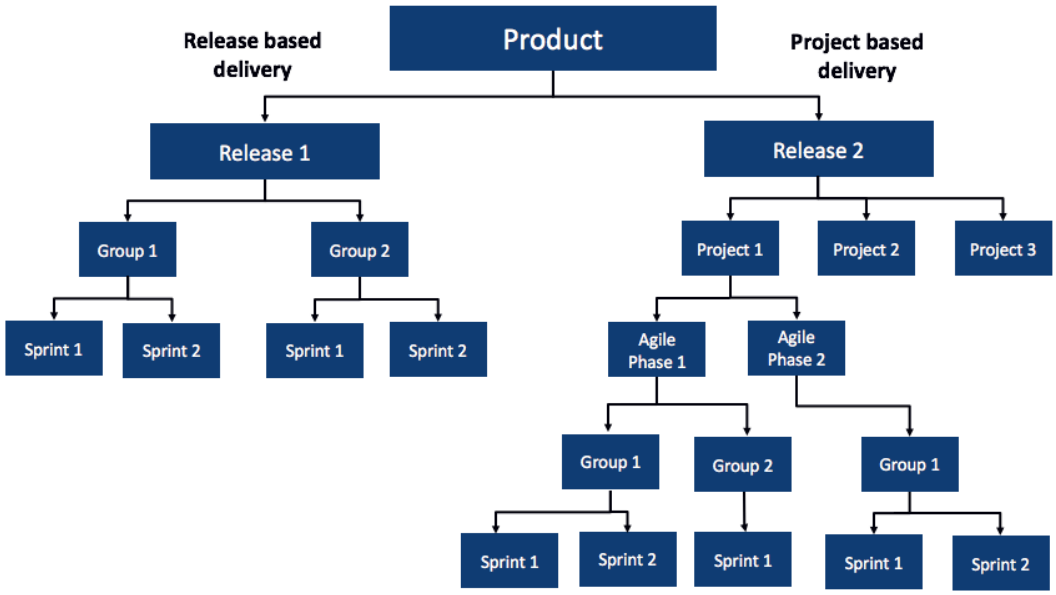
- Release-based delivery
- Project-based delivery
- Standalone project development

Agile Development 2.0 provides the flexibility to maintain a unified backlog that can be used for both release-based or project-based types of delivery. You can maintain all your backlog in one place and associate the stories to a product,project, or both. You can also select stories from the backlog and execute them as a project, as a standalone project development.

The following example shows how Agile Development 2.0 supports a unified backlog for both project-based and release-based type of deliveries.

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Agile development work flow use cases



Release-based development use case in Agile Development

An example of release-based development and delivery model using Agile Development.

The usual activities involved in a release-based agile development are:

- Maintain Product Backlog: Product owners maintain the product backlog. They continuously groom their backlogs by adding stories, prioritizing, and estimating them.

  In Agile Development 2.0, navigate to **Agile Development** > **Backlog** > **All Stories** for the list of all the stories. You can filter the list for a specific product.

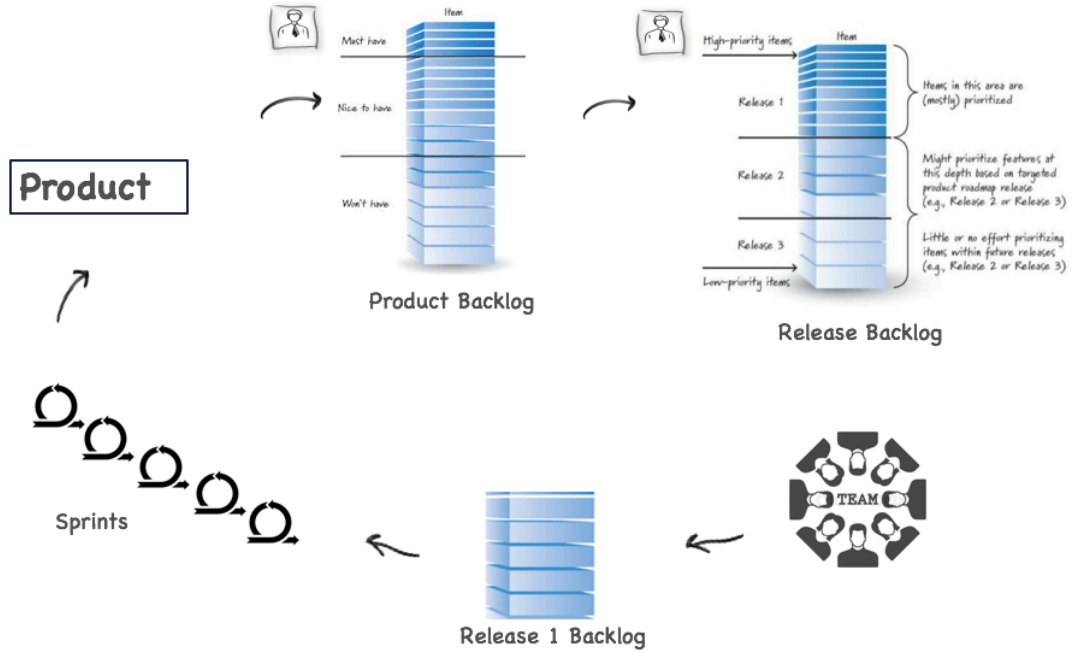
- Release Planning: Organizations have definite release cycles such as quarterly release, bi-yearly release, yearly release. The product owners select the prioritized stories from the product backlog that should be completed in a given release to form Release Backlog.
- Assignment of stories: In Agile Development 2.0, navigate to **Agile Development** > **Stories**. Select the stories that you want to assign to a release and select **Assign to release/group**. Specify a team that you want to associate these stories with.
- Sprint planning: The scrum teams define their sprint schedule such as two-week sprint or three-week sprint. They work with the product owner, and select stories from the release backlog that should be completed in each sprint to create Sprint Backlog. The group members along with product owner and scrum master decide stories for each sprint using Sprint Planning.

  In Agile Development 2.0, navigate to **Agile Development** > **Agile Board** > **Sprint Planning**.

The following illustration provides a high-level overview of the workflow in a release-based Agile Development environment.

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Release based agile development workflow example



Project-based development use case in Agile Development

An example of project-based development and delivery model in Agile Development.

The usual activities involved in a project-based Agile Development include the following:

- Product Backlog: Product owners maintain the product backlog. They continuously groom their backlogs by adding stories, prioritizing and estimating them.

  In Agile Development 2.0, navigate to **Agile Development** > **Backlog** > **All Stories** for the list of all the stories.

- Project Backlog: Product owners select the prioritized stories and assign them to one or more projects, thus creating the project backlog. Product owners can create one or more projects and capture additional details such as required resources, cost, risk, strategic alignment. All these projects undergo portfolio prioritization process, and the selected projects are executed by the project teams.

  Note:
  Some organizations also define release cycles such as quarterly release, bi-yearly release, yearly release. They then move the stories from product backlog to the release backlog. In these cases, stories are assigned to the projects from the release backlog.

  In Agile Development 2.0, navigate to **Agile Development** > **Stories** and select **Assign to project** to assign stories to a new or existing project.

  You can also open an existing project and associate stories to the project from the backlog. These stories are then executed as part of project execution.

- Assignment of stories: Assign the stories of the project to an assignment group so that the team can pick these up in the upcoming sprints.

  In Agile Development 2.0, select the stories that you want to assign to a release, select **Assign to release/group** and specify an assignment group.

- Sprint planning: The scrum teams define their sprint schedule such as two-week sprint or three-week sprint. They work with the product owner, and select stories from the release

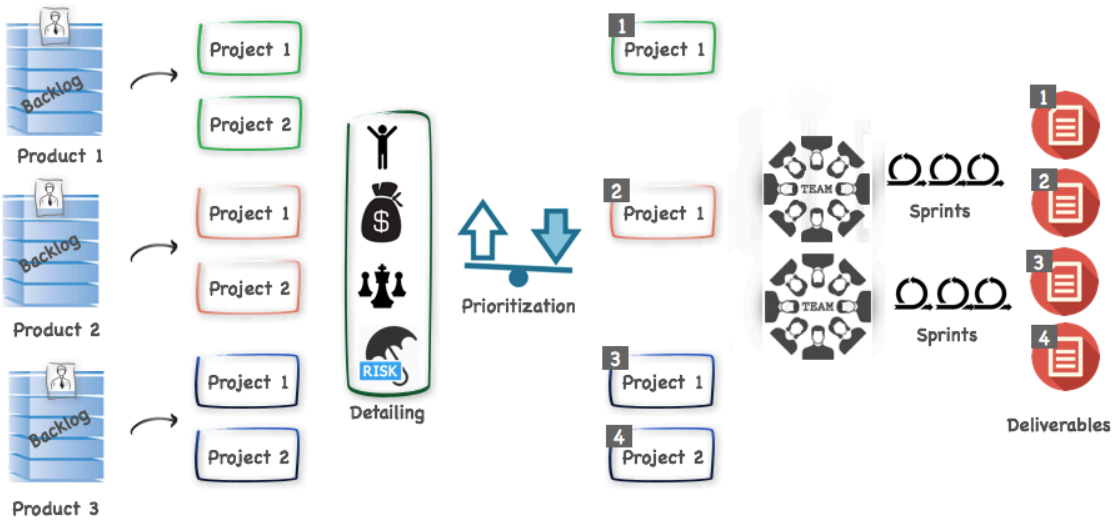
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backlog that should be completed in each sprint to create Sprint Backlog. The group members along with product owner and scrum master decide stories for each sprint using Sprint Planning.

In Agile Development 2.0, navigate to **Agile Development** > **Agile Board** > **Sprint Planning**.

The following illustration provides a high-level overview of the workflow in a project-based Agile Development environment.

Project-based Agile Development workflow example



Standalone project development use case in Agile Development

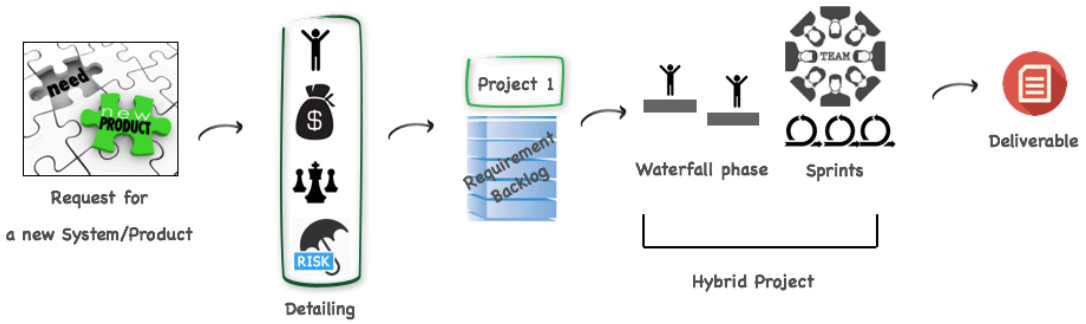
An example of a standalone project development and delivery model in Agile Development.

In this case, a request (demand) for a new product or feature or system is raised. Demand managers capture the requirements in terms of stories. They also capture the other details for the demand such as resources required, cost, risks, and strategic direction. Such demands are converted into projects upon approval. Project managers can choose pure agile or hybrid mode of project execution. In hybrid mode, the initial phases such as planning, and analysis are taken up as waterfall tasks, and then the execution is done as agile phase. The agile phase is assigned to an agile group. The agile group then completes the work by sprint execution.

The following illustration provides a high-level overview of the workflow for executing a standalone project development.

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Project based agile development workflow example



Using Agile Development 2.0 for standalone hybrid project development

Steps to execute a standalone hybrid project:

1. Create demand: Capture requirements at demand state in terms of user stories. Use the Stories related list on the demand form to create stories.
2. Demand to Project conversion: When the demand is converted to a project, the stories in demand move to the project so that the project team (assignment group) can execute them. During the conversion, an Agile phase is also created, and the stories are assigned to the Agile phase.
3. Sprint planning: The agile group members along with project manager, and scrum master perform sprint planning. Navigate to **Agile Development** > **Agile Board** > **Sprint Planning** to plan sprints.

Agile board in Agile Development 2.0

The Agile board is a landing page where you can perform key actions of the scrum process such as managing your backlogs, planning your sprints, and tracking the sprint progress.

The Agile board is organized in the following tabs to help you manage these activities. You would require one or more of the scrum_admin, scrum_master, scrum_product_owner, or scrum_sprint_planner user roles.

Backlog

The Backlog tab helps you manage your personalized backlogs. Within the Backlog tab, you can:

- Create stories, epics, and themes.
- View all active stories that are assigned to a team but that are not assigned to any sprint.
- View cards indicating the total number of stories, stories that do not have story points, and stories that do not have acceptance criteria in your backlog.

  Clicking any of these cards gives you a list of stories from that category.
- Reorder stories in the backlog across pages.
- Filter the stories by epic by using the Records by epic section.

  In this section, only those epics are listed, which belong to the stories of the selected backlog.

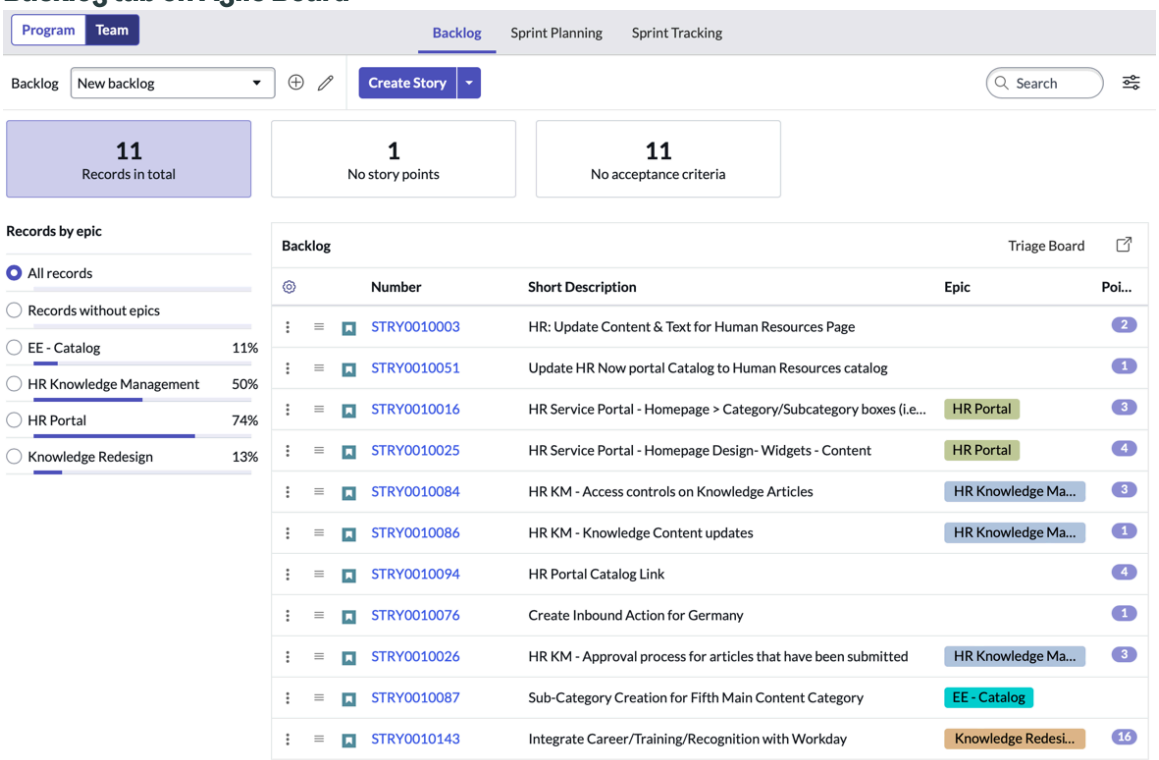
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- The epics for the stories from your backlog are listed in this section.
- Epic completion is indicated by a progress bar and percentage.
- You can show or hide this section by selecting the configuration icon ( ).

- Personalize columns by using the personalize icon ( ).
- Use the search option to filter stories using a keyword.

For more information on how to manage your backlog, see Manage your product backlog in Agile Development 2.0.

Backlog tab on Agile Board



Sprint Planning

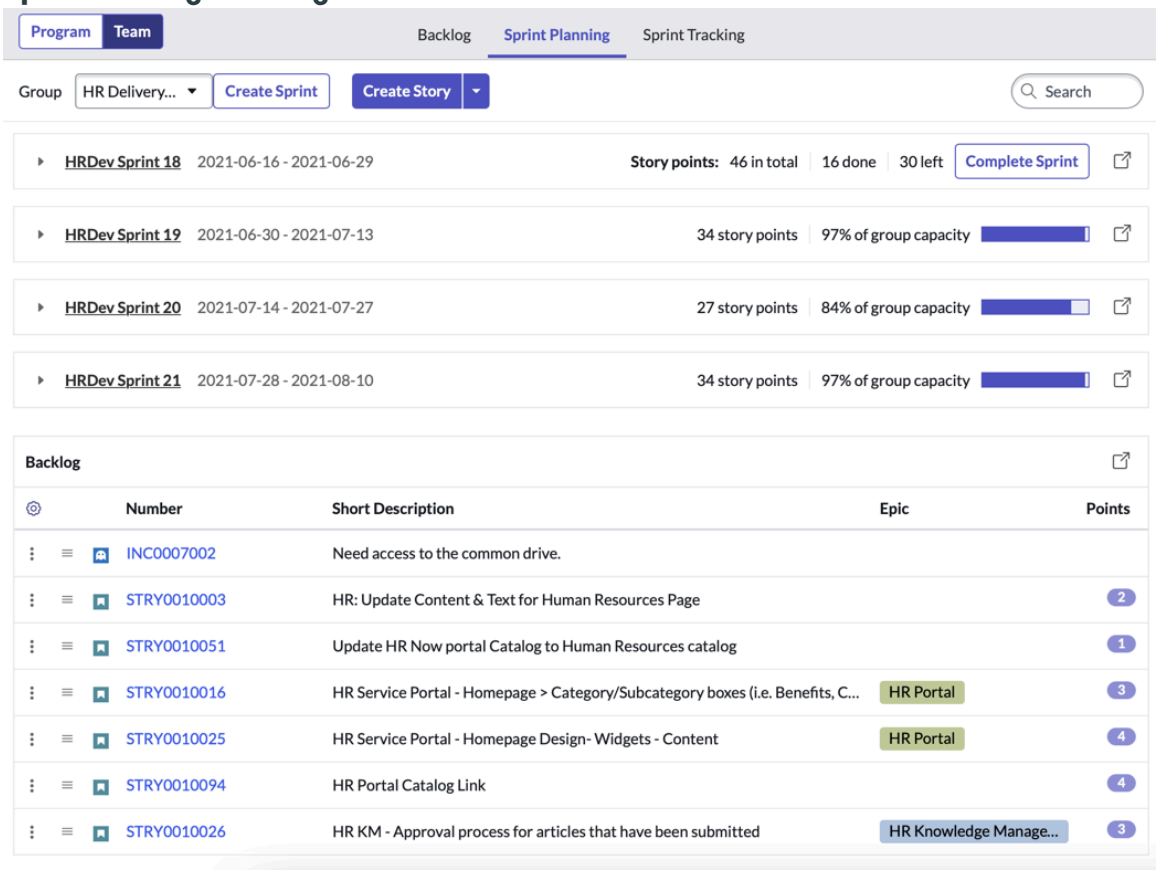
The Sprint Planning tab of the Agile board shows the team backlog and sprints as sections, which contain the list of stories. You can create, edit, and plan for sprints using the options available in this tab.

From the Sprint Planning tab, you can:

- Create, organize, monitor, start, and complete sprints.
- View current and future sprints in chronological order.
- View planned start and end dates, story points, percentage group velocity, and the number of story points (total, complete, and pending) for the current sprint.
- Assess stories in the backlog and drag them to sprints.
- Add stories to the backlog and set up their order of implementation.
- Move unfinished stories from the completed sprint to the backlog or to a future sprint.

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Sprint Planning tab on Agile Board



Sprint Tracking

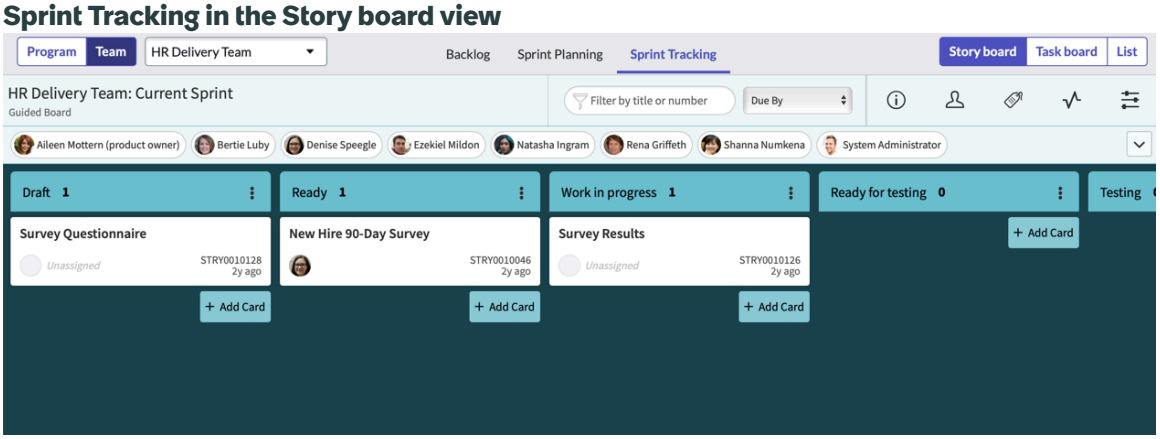
From the Sprint Tracking tab, you can track the progress of your current sprint in a Story board, Task board, or list view.

Story board

- Track all the stories of the current sprint across lanes.
- Move a story from one lane to another, which updates the state of the story.
- Filter stories by search criteria.

For more information, see Track progress of stories for a sprint in Agile Development 2.0.

Sprint Tracking in the Story board view



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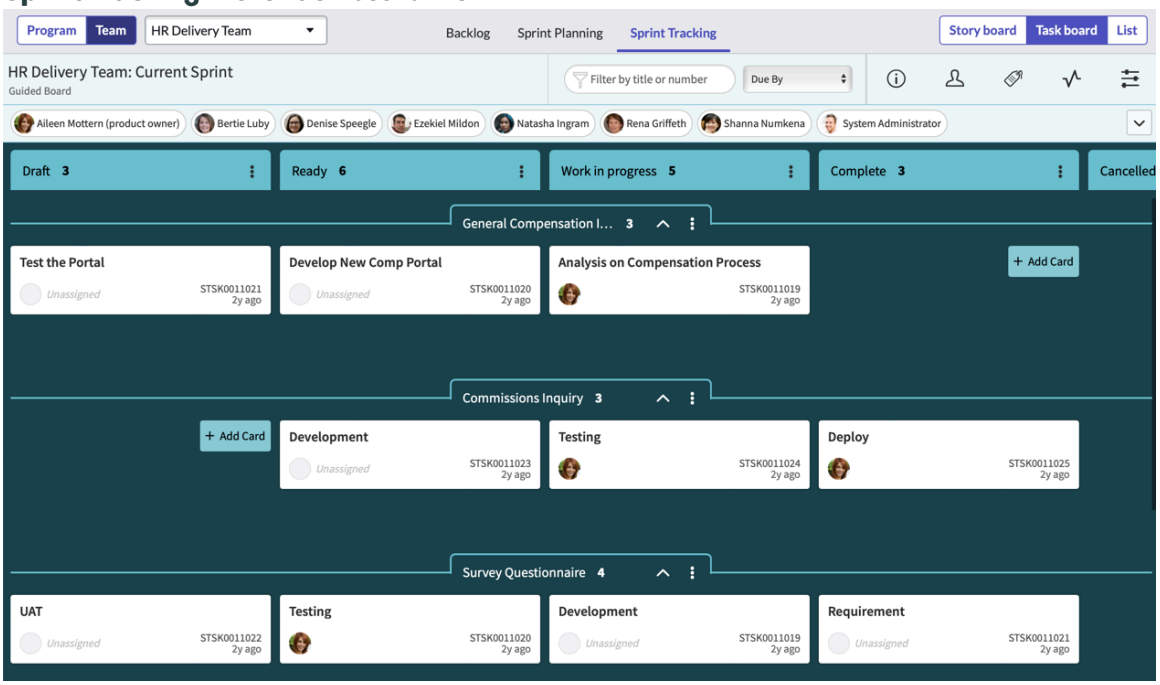
Task board

The Task board enables you to track all the scrum tasks for stories of the current sprint across lanes. You can:

- Move scrum tasks from one lane to another, which updates the state of the stories.
- Filter scrum tasks by search criteria.

For more information on tracking your scrum tasks using the board view, see Track progress of scrum tasks for a sprint in Agile Development 2.0.

Sprint Tracking in the Task board view



List

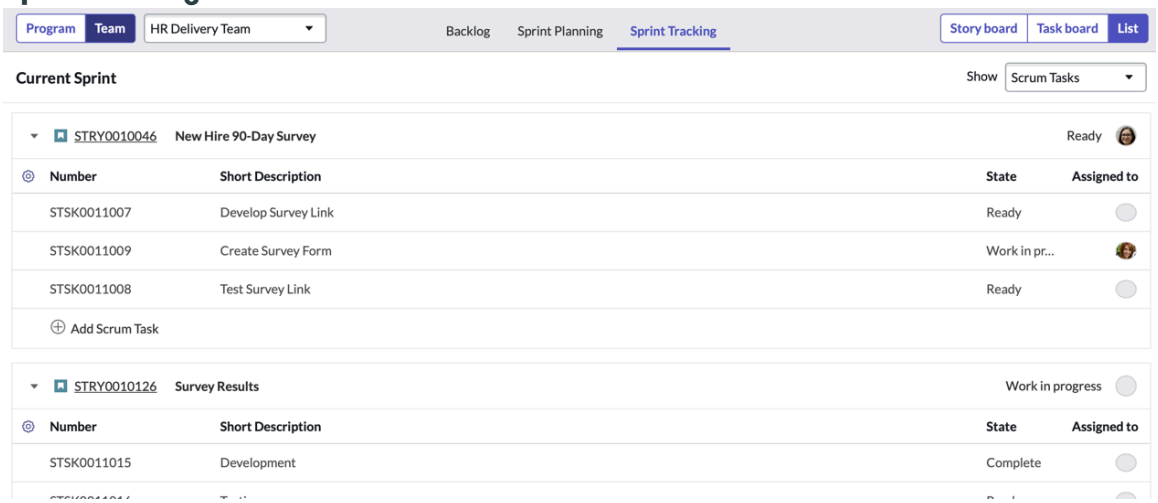
The List view displays scrum tasks and tests for the stories of the current sprint. In the List view, you can:

- Add scrum task and tests without leaving the context of the record.
- View the state, short description, and assignee of the scrum task.
- View the short description and result of a test.
- Assess scrum tasks and tests that are still pending before the current sprint is closed.

For more information on tracking a sprint's progress using the List view, see Track sprint progress in Agile Development 2.0.

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Sprint Tracking in the List view



Related topics

Visual Task Boards

Reporting defects in Agile Development 2.0

Create defects for the issues that are reported for your product using Agile Development 2.0. You can then create stories for these defects so that your teams can start working on resolving them.

Defects can be used to report and track the resolution of issues that are noticed during the development of a new feature, or as a feedback for existing features. Product owners then review these defects and decides on creating stories for them, which are assigned to the relevant assignment groups.

User role to create defects

Users who are expected to create defects in Agile Development 2.0 must have one of the following roles:

- feature_user
- scrum_story_creator
- scrum_admin

However, if a user has just the feature_user role, they can only view the defects from the **Defects** module of the Agile Development application. They can not view the stories associated with the defects in the Stories related list of the defect record.

For information on how to create Defects, see Report a defect in Agile Development 2.0.

Enhancement requests in Agile Development 2.0

Create enhancement requests for different areas of your product in Agile Development 2.0. You can then create stories for these requests so that your teams can start working on developing them.

Enhancement requests can be used to log feature enhancements for a product. These requests can arise from internal requirements or customer feedback. Product owners review these logged requests and decides on creating stories for them based on priority. These stories are then assigned to the relevant assignment groups for development.

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User role to create enhancement requests

Creating or editing enhancement requests requires one of the following roles:

- feature_user
- scrum_story_creator
- scrum_admin
- rm_enhancement_admin

However, a user without scrum roles can only access these requests from the **Enhancement Requests** module of the Agile Development application and not stories that are created for this request.

Note:
The administrator must grant the feature_user role to all users who are expected to create an enhancement request in the Agile Development application.

For information on how to create enhancement requests, see Create an enhancement request in Agile Development 2.0.

After an enhancement request is created, users with scrum_story_creator or scrum_admin role can:

- Review the enhancement request and create a story for it.
- Manage stories from the *Stories* related list in the Enhancements form.

Agile Development — Unified Backlog

The ServiceNow® Agile Development — Unified Backlog application helps you maintain a centralized backlog for records of different task types, such as defects, problems, or enhancements. Prioritize different task types from one location, and automatically create stories for these records, saving time.

The work flow described here represents the common practice of creating and managing records using the Agile Development — Unified Backlog with Agile Development 2.0.

Set up a triage board

Define filter criteria and create your triage boards. Triage boards help you view records of a specific task type,giving better visibility. For example, you can create one triage board for defects and another for incidents. The triage board is automatically updated with any new record that matches the defined filter criteria.

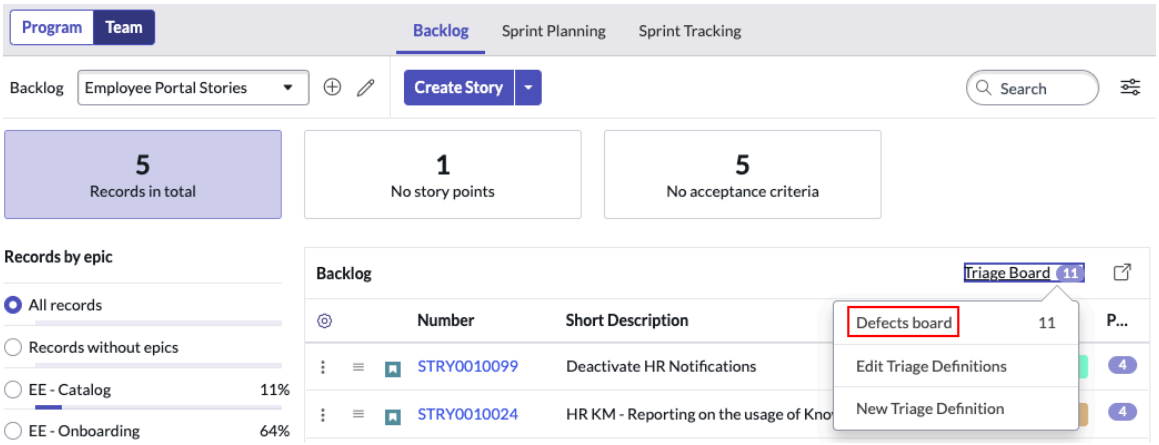
See Set up a triage board in Agile Development 2.0

Triage records

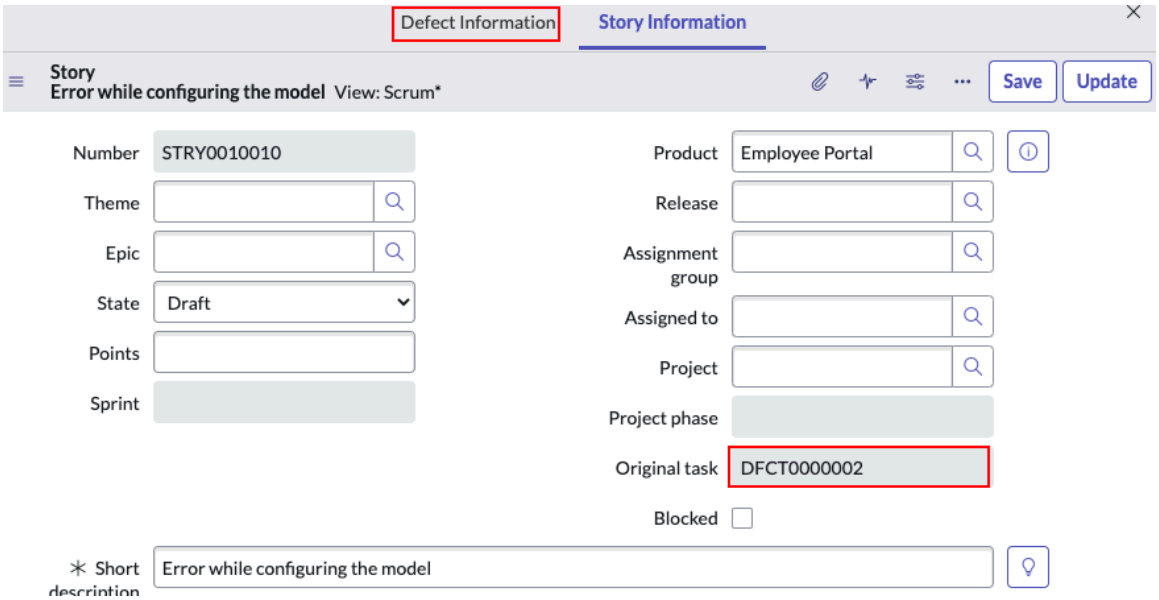
From the Backlog tab of the Agile board, you can:

- View the total numbers of records in the triage boards of all task types
- Open the triage board of a specific task type
- Edit the filter definition of an existing triage board

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You can triage the records and add them to your product or team backlog. Items added to the backlog from the triage board will also have stories created for them automatically. See Triage items and add them to a backlog in Agile Development 2.0.



Assign records

After a record is added to the backlog from a triage board, treat it as you would a regular story. You can assign it to the relevant product teams and schedule it for upcoming sprints. See Plan your sprint activities in Agile Development 2.0.

Work with the assigned records in a board view

Records from a triage board are represented by stories on the Agile board. You can track the status of these stories from the Story board view of the Sprint Tracking tab. See Track progress of stories for a sprint in Agile Development 2.0.

When you move these stories to different lanes on the story board to update their state, the state of the associated story is updated but the state of the original triaged record remains the same. To change the state of the original record, open the story and switch to the original record tab.

Configuring Agile Development 2.0

Activate Agile Development 2.0, migrate from Agile Development 1.0, and perform other related tasks to set up Agile Development 2.0.

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Using guided setup to implement Agile Development 2.0

Agile Development 2.0 guided setup provides a sequence of tasks that help you configure the application on your ServiceNow instance.

To open Agile Development 2.0 guided setup, navigate to **All** > **Agile Development** > **Agile Development Guided Setup**.

For more information about using the guided setup interface, see Using guided setup.

Activate Agile Development 2.0

Activate the Agile Development 2.0 plugin (com.snc.sdlc.agile.2.0) if you have the admin role.

Before you begin

Role required: admin

About this task

- If you are upgrading from an earlier ServiceNow release version of Agile Development to Agile Development 2.0, read upgrade information before activating the plugin.
- The dashboards for Agile Development 2.0, if required, must be activated separately using the Performance Analytics – Content Pack – Project Portfolio Suite Dashboards plugin (com.snc.pps_dashboards). The Performance Analytics license is required to use the dashboards.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note:
   When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Migration from Agile Development 1.0 to Agile Development 2.0

Migrate from Agile Development 1.0 to Agile Development 2.0 for enhanced agile capabilities and features.

Important:
Agile Development 1.0 and its features such as Sprint burndown chart and release burndown chart are deprecated and no longer available. Agile Development 2.0 provides the latest experience for supporting your Agile work methodology.

Apply the following migration steps on a non-production instance, verify if the migration is completed as intended, and then perform the migration steps on a production instance.

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- Manage customizations before upgrading to Agile Development 2.0.
- Delete customizations.
- Activate Agile Development 2.0.
- Complete the prerequisites for converting teams to Agile Development 2.0 groups
- Convert Agile Development 1.0 teams to Agile Development 2.0 groups
- Verify the conversion of Agile Development 1.0 teams to Agile Development 2.0 groups

Related topics

Migration Guide - Agile Development 1.0 to Agile Development 2.0

Manage customizations before upgrading to Agile Development 2.0

You can take complete advantage of enhanced agile functionality by managing your customizations before upgrading to Agile Development 2.0.

Important:
Agile Development 1.0 and its features such as Sprint burndown chart and release burndown chart are deprecated and no longer available. Agile Development 2.0 provides the latest experience for supporting your Agile work methodology.

As of any regular upgrade, if core platform artifacts such as form layout, adding of fields, removal of preconfigured fields, list layout, business rules, or client scripts, are customized in your environment, then changes made to any of these artifacts as part of the Agile Development 2.0 enhancements are not applied in your environment. You should delete all your customizations before upgrading to Agile Development 2.0, and selectively reapply customizations as needed after upgrade.

Following are the three possible scenarios:

No customizations

You do not have any customizations in your Agile Development implementation and want to use the Agile Development 2.0 functionality. In such a case, install the Agile Development 2.0 plugin (com.snc.sdlc.agile.2.0).

Minor customizations

There are few minor customizations, but you want to use the Agile Development 2.0 functionality. In such a case, delete all customizations.

Customizations require review

There are a few customizations in your Agile Development implementation that are mapped to your business process. Though you want to use the Agile Development 2.0 functionality, you may want to review your customizations and decide whether to delete all the customizations or retain a few customizations. For such a case:

- A utility is provided which automatically detects the customized platform artifacts, such as list layout, form layout, business rules, that were enhanced as part of the Agile Development 2.0 enhancements. For details of this utility and list of all platform artifacts enhanced in Agile Development 2.0, see Review a utility customization for Agile Development 2.0.
- After analyzing, if you do not want to retain any of the customizations, then delete the customizations. If you want to retain a few, delete the customizations and reapply them after the upgrade.
- If you have created your own artifacts, such as business rules and UI policies, verify whether the artifacts work as intended after the upgrade.

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Delete customizations before upgrading to Agile Development 2.0

Take complete advantage of enhanced functionality by deleting all your customizations before upgrading to Agile Development 2.0.

Before you begin

Role required: admin

About this task

Important:
Agile Development 1.0 and its features such as Sprint burndown chart and release burndown chart are deprecated and no longer available. Agile Development 2.0 provides the latest experience for supporting your Agile work methodology.

Procedure

1. In the Navigation filter, enter `sys_properties.list`.
   The entire list of properties in the System Properties [sys_properties] table appears.
2. Click **New**.
3. On the form, fill in the fields as follows:

Field	Value
Name	com.snc.sdlc.scrum.pp.delete_customer_updates
Description	Delete customizations in the Agile Development application from the Customer Update [sys_update_xml] table.
Type	true|false
Value	true

4. Click **Submit**.

   All customizations would be deleted and the property also would be automatically deleted.

What to do next

If the Agile Development 2.0 plugin (com.snc.sdlc.agile.2.0) has been installed before deleting the customizations, refresh the plugin by reinstalling it.

Related topics

Add a system property

Convert Agile Development 1.0 teams to Agile Development 2.0 groups

Complete most of the migration steps by converting teams in Agile Development 1.0 to groups in Agile Development 2.0.

Before you begin

Complete the procedure given in Complete the prerequisites for converting teams to Agile Development 2.0 groups.

Role required: admin

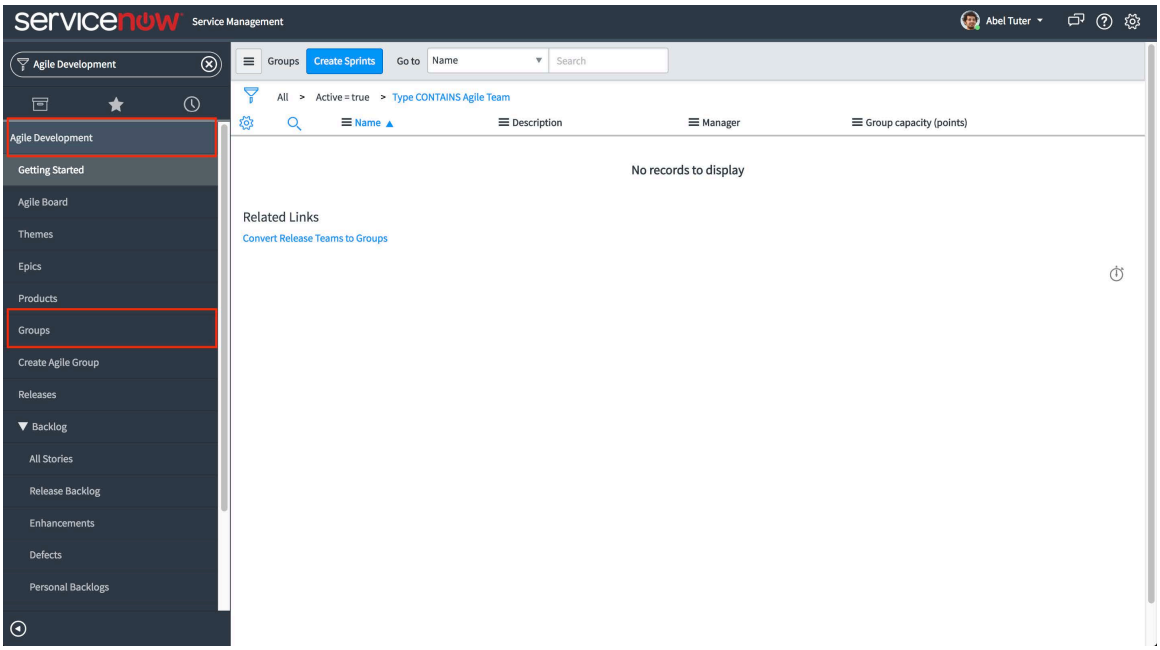
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About this task

Important:
Agile Development 1.0 and its features such as Sprint burndown chart and release burndown chart are deprecated and no longer available. Agile Development 2.0 provides the latest experience for supporting your Agile work methodology.

Procedure

1. Navigate to **All** > **Agile Development** > **Groups**.



An empty list is displayed because there are no assignment groups with the type Agile Team. If there are any groups with the type Agile Team, a list of groups are displayed.

2. Click the **Convert Release Teams to Groups** related link.
The list of all release teams (scrum_pp_team) table that you had defined in the Agile Development plugin is displayed. If you have been defining teams for each release, multiple records are displayed for the team (team with the same name), one for each release. In the following screenshot, four records are displayed for the team Facilities Software Team, one for each release.



3. Complete the prerequisites for converting teams to groups.

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Since migration is performed on a non-production instance first, convert one team to a group, verify if the migration is done successfully for the team, and then perform the same procedure for rest of the teams.

In the preceding example, all the four records for the Facilities Software Team can be selected at once. Consider the Facilities Software Team team as a sample team.

4. Select all records of the sample team and click **Convert to Group**.
   All the teams are converted to an assignment group. If an assignment group exists with the same name, a new group is not created, but other migration activities are carried out for the group, for example, updating the group reference to the sprint and story table. Perform the following steps manually:
   - Update the group type to Agile Team.
   - If release team members and group members are different, synchronize the members between group and team.

Complete the prerequisites for converting teams to Agile Development 2.0 groups

Perform prerequisite steps to later ensure that the conversion of teams to Agile Development 2.0 groups is successful.

Before you begin

Role required: admin

About this task

Important:
Agile Development 1.0 and its features such as Sprint burndown chart and release burndown chart are deprecated and no longer available. Agile Development 2.0 provides the latest experience for supporting your Agile work methodology.

The team being selected should have at least one sprint that is current. The current sprint should have a few completed and a few WIP stories. This is to verify that the sprint burndown is updated correctly post conversion. If you do not have such a team, you may select any team for conversion.

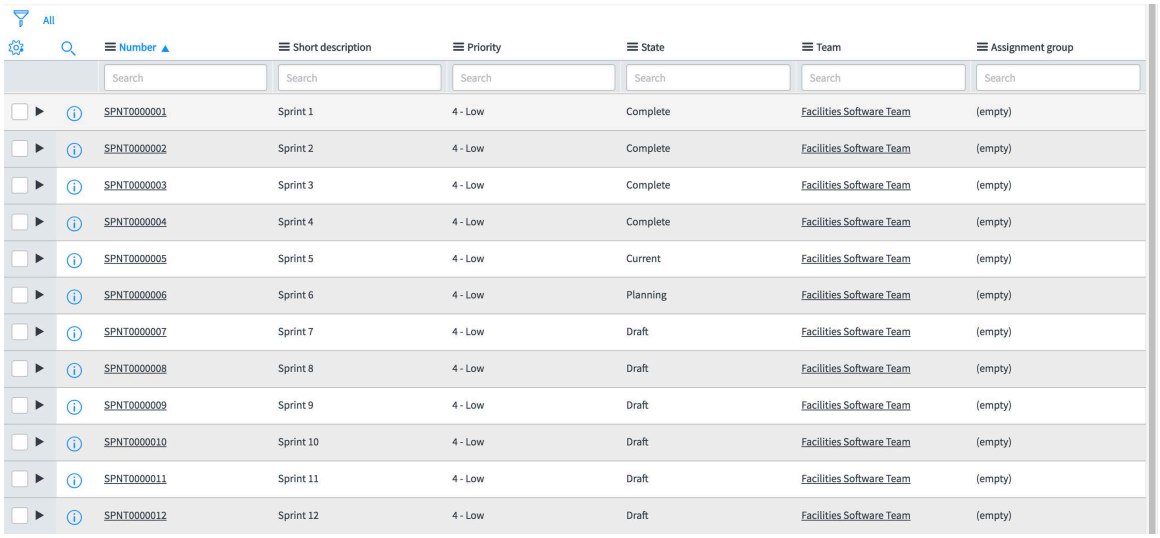
Procedure

1. Find out the sprints assigned to the team across all a release.

   Note:
   Use this step to verify whether the assignment group is updated successfully across all the sprints.

   a. In the search panel in navigator, type rm_sprint.list to view the list of all sprints.
   b. Display the **Team** and **Assignment group** fields if not displayed.
   c. Apply the team name filter. The **Assignment group** field is empty.
   d. Capture the screen or export the list of all sprints. In the sample example, sprint 5 is the current sprint for the team being converted.

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All

Number ▲	Short description	Priority	State	Team	Assignment group
Search	Search	Search	Search	Search	Search
SPNT0000001	Sprint 1	4 - Low	Complete	Facilities Software Team	(empty)
SPNT0000002	Sprint 2	4 - Low	Complete	Facilities Software Team	(empty)
SPNT0000003	Sprint 3	4 - Low	Complete	Facilities Software Team	(empty)
SPNT0000004	Sprint 4	4 - Low	Complete	Facilities Software Team	(empty)
SPNT0000005	Sprint 5	4 - Low	Current	Facilities Software Team	(empty)
SPNT0000006	Sprint 6	4 - Low	Planning	Facilities Software Team	(empty)
SPNT0000007	Sprint 7	4 - Low	Draft	Facilities Software Team	(empty)
SPNT0000008	Sprint 8	4 - Low	Draft	Facilities Software Team	(empty)
SPNT0000009	Sprint 9	4 - Low	Draft	Facilities Software Team	(empty)
SPNT0000010	Sprint 10	4 - Low	Draft	Facilities Software Team	(empty)
SPNT0000011	Sprint 11	4 - Low	Draft	Facilities Software Team	(empty)
SPNT0000012	Sprint 12	4 - Low	Draft	Facilities Software Team	(empty)

2. Find out the stories that are associated with the sprints of the team being converted.

> **Note:**
> Use this step to verify that the assignment group is updated successfully across all stories.

a. In search panel in navigator, type rm_story.list to view the list of all stories.

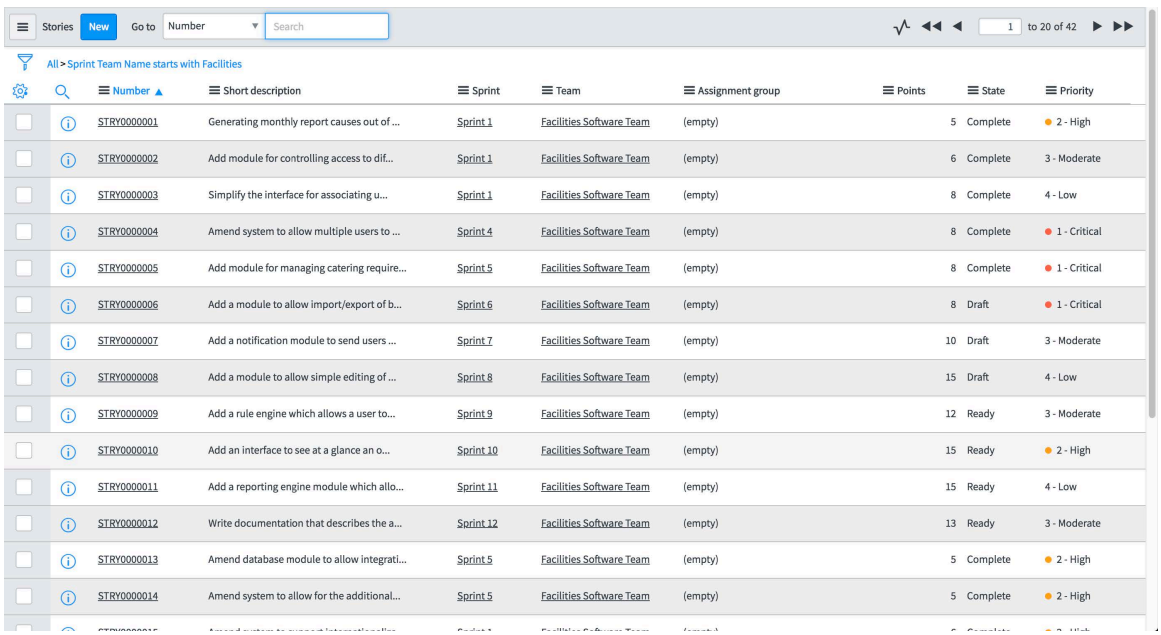
b. Filter out the stories belonging to the sprints noted in the preceding step.

c. Display **Sprint.Team** and **Assignment group** fields in the list layout. The **Assignment group** field is empty.

d. Capture the screen or export this list.

e. Filter the story table to fetch the list of all stories belonging to sprints of the team being converted. Apply the following filter:

sprint.release_teamSTARTSWITH<name of the team>



Stories | New | Go to | Number | Search | 1 to 20 of 42

All > Sprint Team Name starts with Facilities

Number ▲	Short description	Sprint	Team	Assignment group	Points	State	Priority
STRY0000001	Generating monthly report causes out of ...	Sprint 1	Facilities Software Team	(empty)	5	Complete	2 - High
STRY0000002	Add module for controlling access to dif...	Sprint 1	Facilities Software Team	(empty)	6	Complete	3 - Moderate
STRY0000003	Simplify the interface for associating u...	Sprint 1	Facilities Software Team	(empty)	8	Complete	4 - Low
STRY0000004	Amend system to allow multiple users to ...	Sprint 4	Facilities Software Team	(empty)	8	Complete	1 - Critical
STRY0000005	Add module for managing catering require...	Sprint 5	Facilities Software Team	(empty)	8	Complete	1 - Critical
STRY0000006	Add a module to allow import/export of b...	Sprint 6	Facilities Software Team	(empty)	8	Draft	1 - Critical
STRY0000007	Add a notification module to send users ...	Sprint 7	Facilities Software Team	(empty)	10	Draft	3 - Moderate
STRY0000008	Add a module to allow simple editing of ...	Sprint 8	Facilities Software Team	(empty)	15	Draft	4 - Low
STRY0000009	Add a rule engine which allows a user to...	Sprint 9	Facilities Software Team	(empty)	12	Ready	3 - Moderate
STRY0000010	Add an interface to see at a glance an o...	Sprint 10	Facilities Software Team	(empty)	15	Ready	2 - High
STRY0000011	Add a reporting engine module which allo...	Sprint 11	Facilities Software Team	(empty)	15	Ready	4 - Low
STRY0000012	Write documentation that describes the a...	Sprint 12	Facilities Software Team	(empty)	13	Ready	3 - Moderate
STRY0000013	Amend database module to allow integrati...	Sprint 5	Facilities Software Team	(empty)	5	Complete	2 - High
STRY0000014	Amend system to allow for the additional...	Sprint 5	Facilities Software Team	(empty)	5	Complete	2 - High

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Verify the conversion of Agile Development 1.0 teams to Agile Development 2.0 groups

Perform verification steps to ensure that the conversion of a team to an assignment group is successful.

Before you begin

Role required: admin

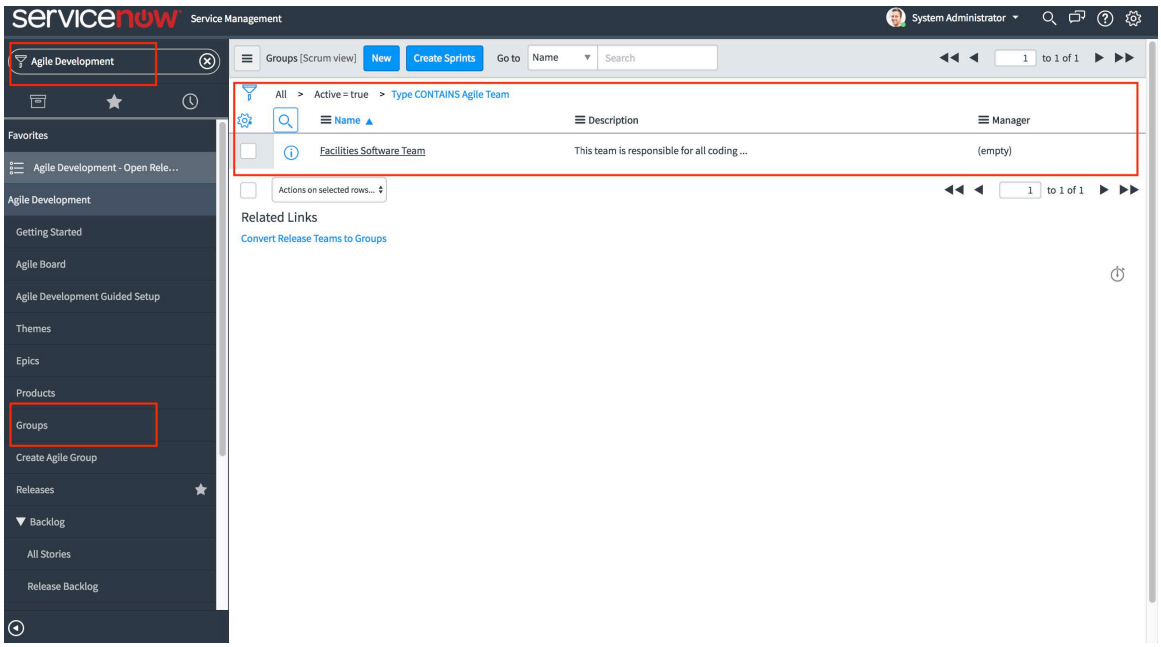
About this task

Important:
Agile Development 1.0 and its features such as Sprint burndown chart and release burndown chart are deprecated and no longer available. Agile Development 2.0 provides the latest experience for supporting your Agile work methodology.

Procedure

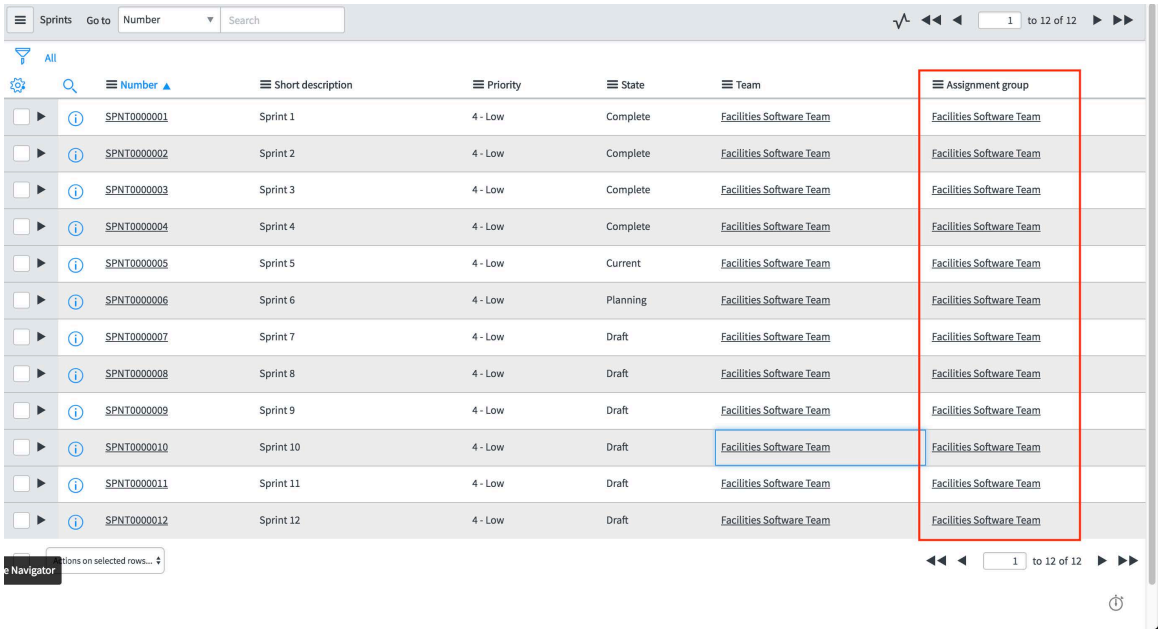
1. Navigate to **All** > **Agile Development** > **Groups**.
2. Verify that the team has been converted to an assignment group.

   If group appears here, it implies that the group type is already set to Agile Team.



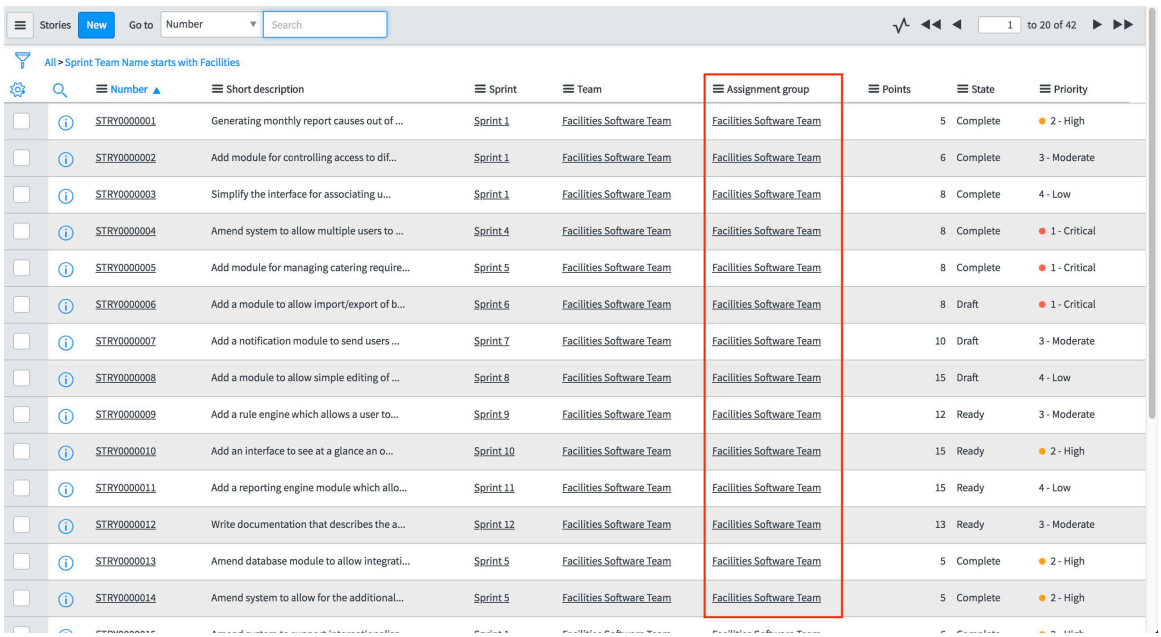
3. Verify that the assignment group is updated across all the sprints of the team.
   It is the same sprint list that you have noted prior to conversion. This list must have the assignment group updated after conversion.

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4. Verify that the stories associated with the sprints of team have been updated with the assignment group.

Following is the list of stories that were noted prior to converting to group:



5. Review the sprint burndown for the sprint that was noted prior to conversion.

It must be same as it was prior to conversion.

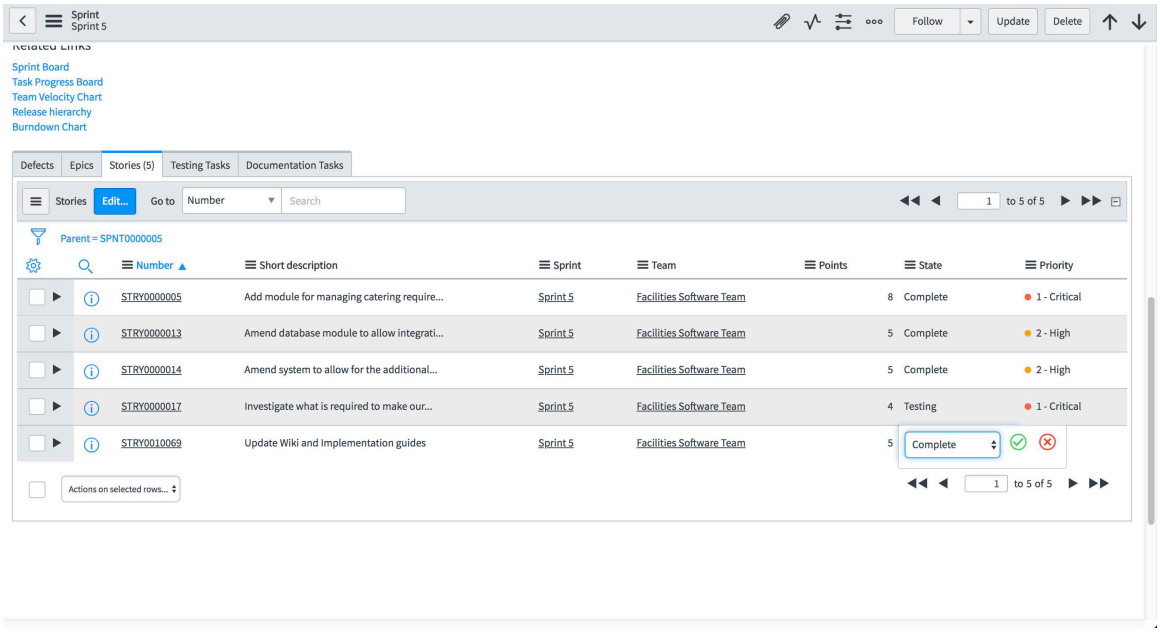
a. Open the rm_srpint table (rm_sprint.list), or open the assignment group.

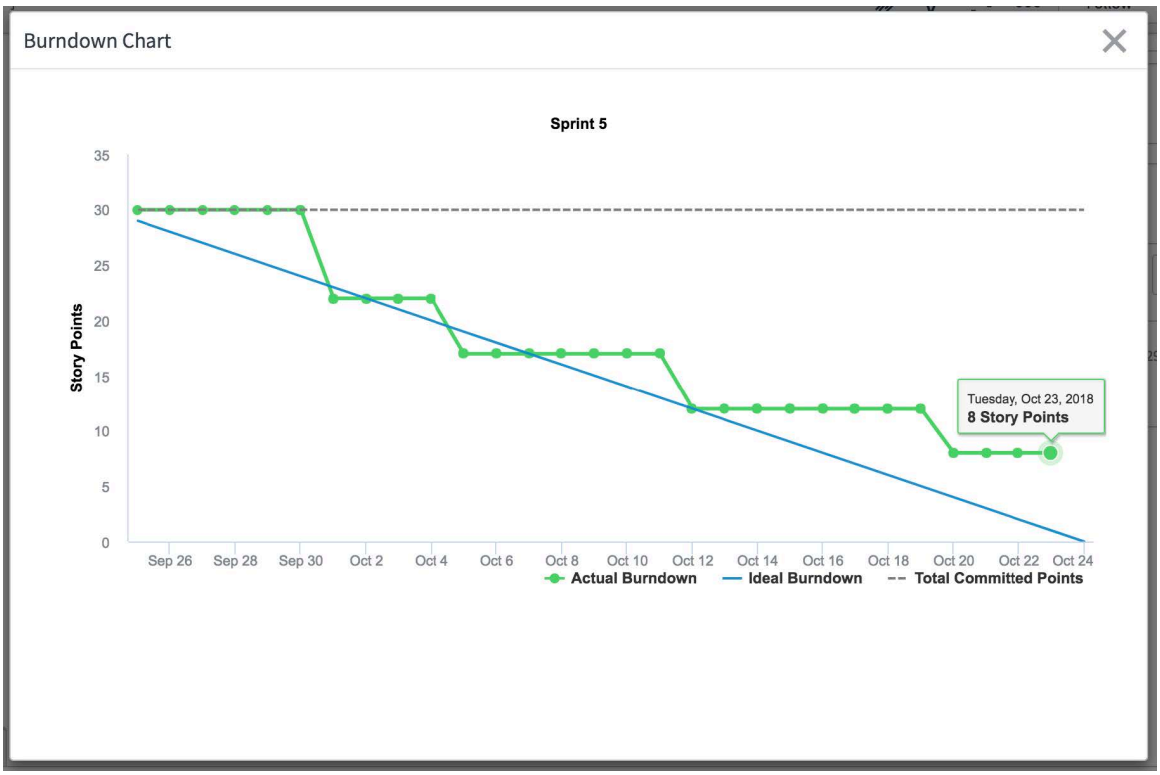
b. Click the current sprint.

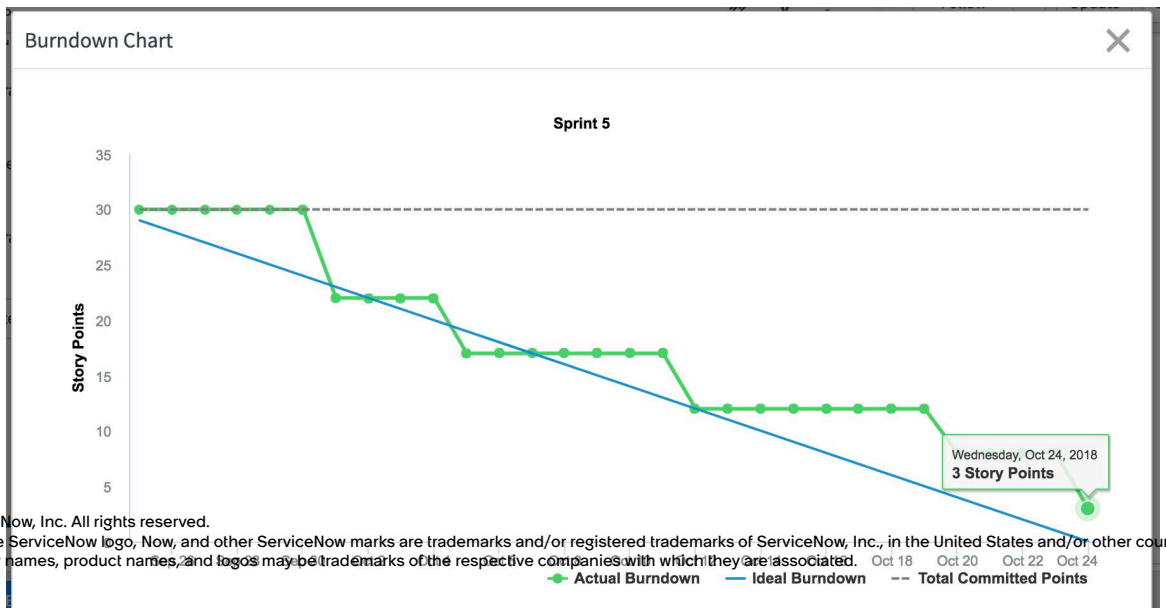
c. Mark any WIP story as complete.

d. Review the sprint burndown that is to be updated with the completed story.

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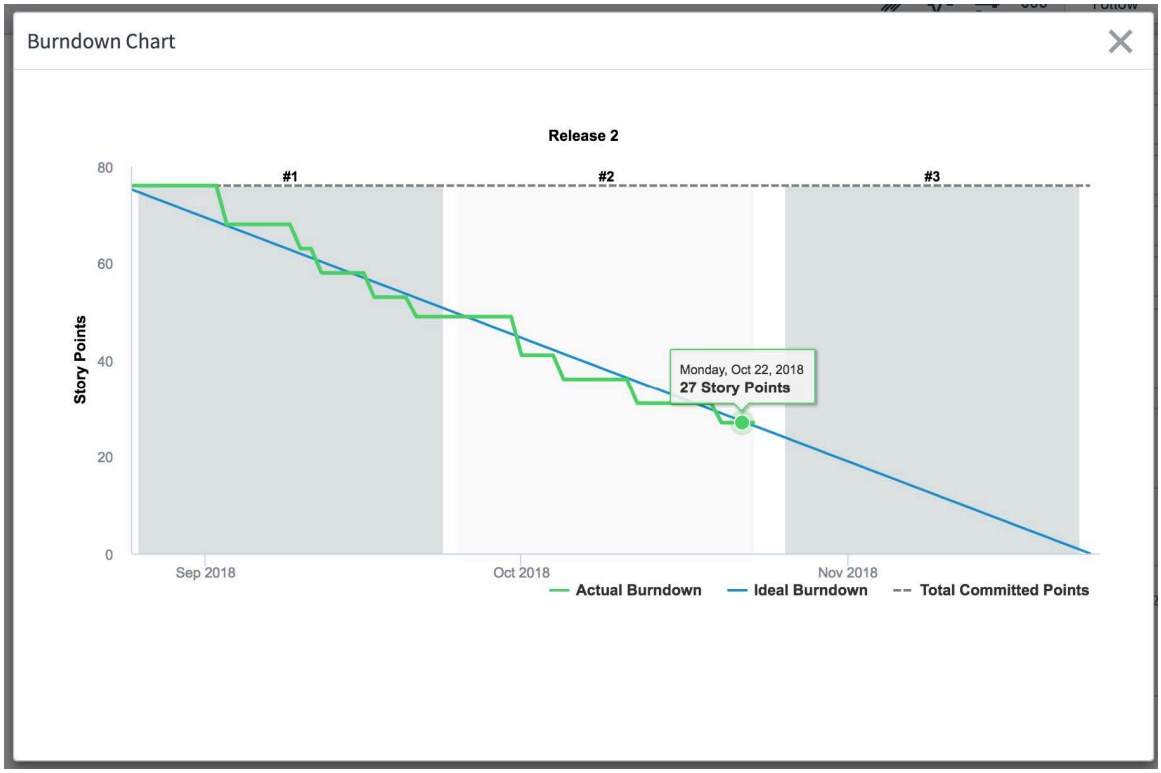


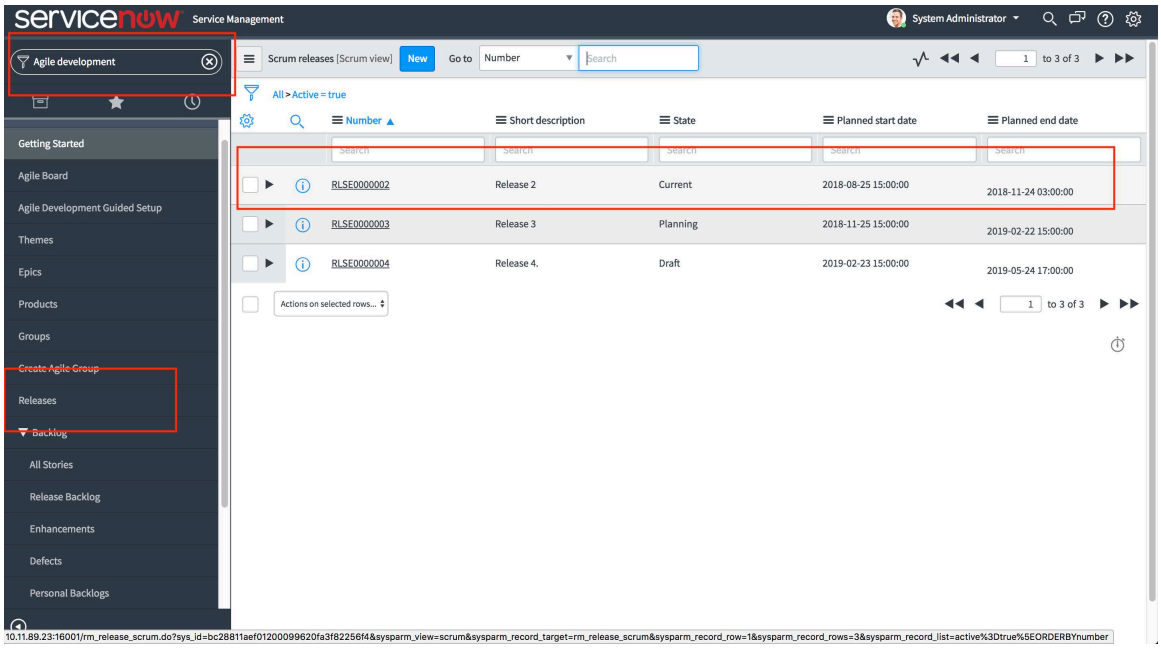
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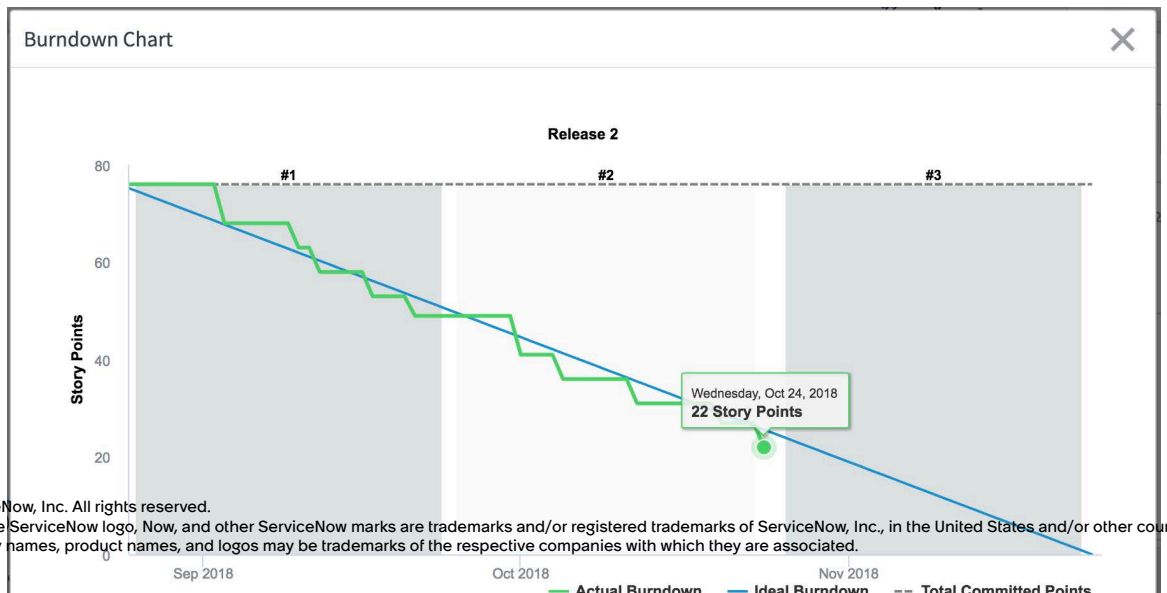
6. Once the story is complete, the release burndown must also be updated correctly.

   For example, in the following screenshot, the burndown is updated correctly for the current release.

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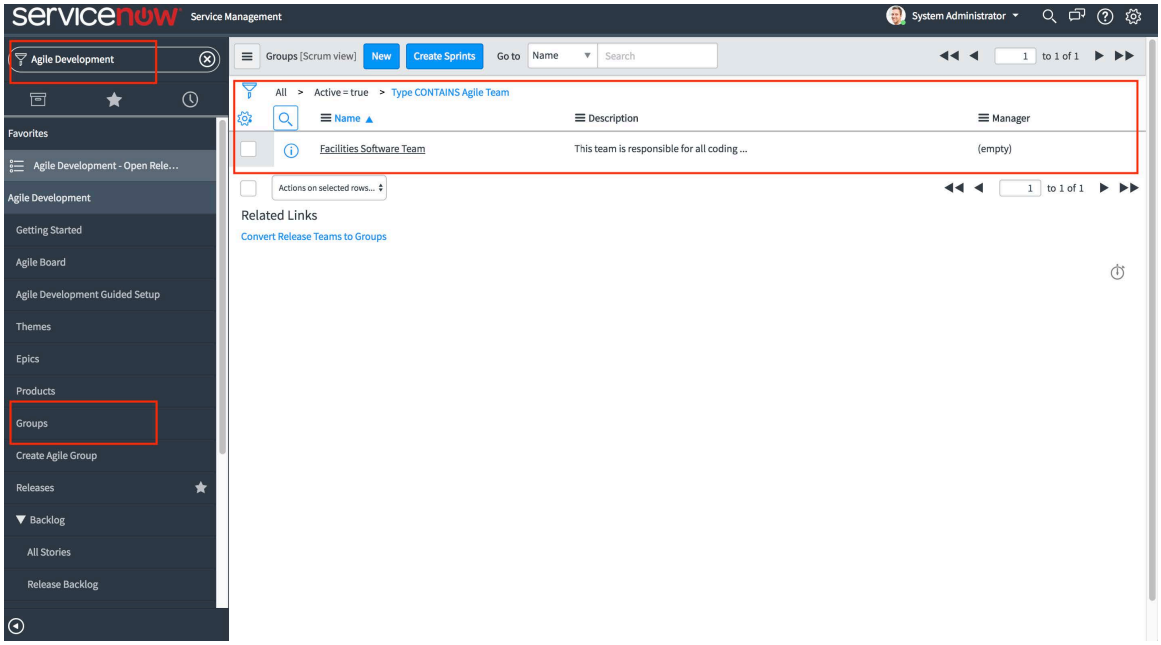




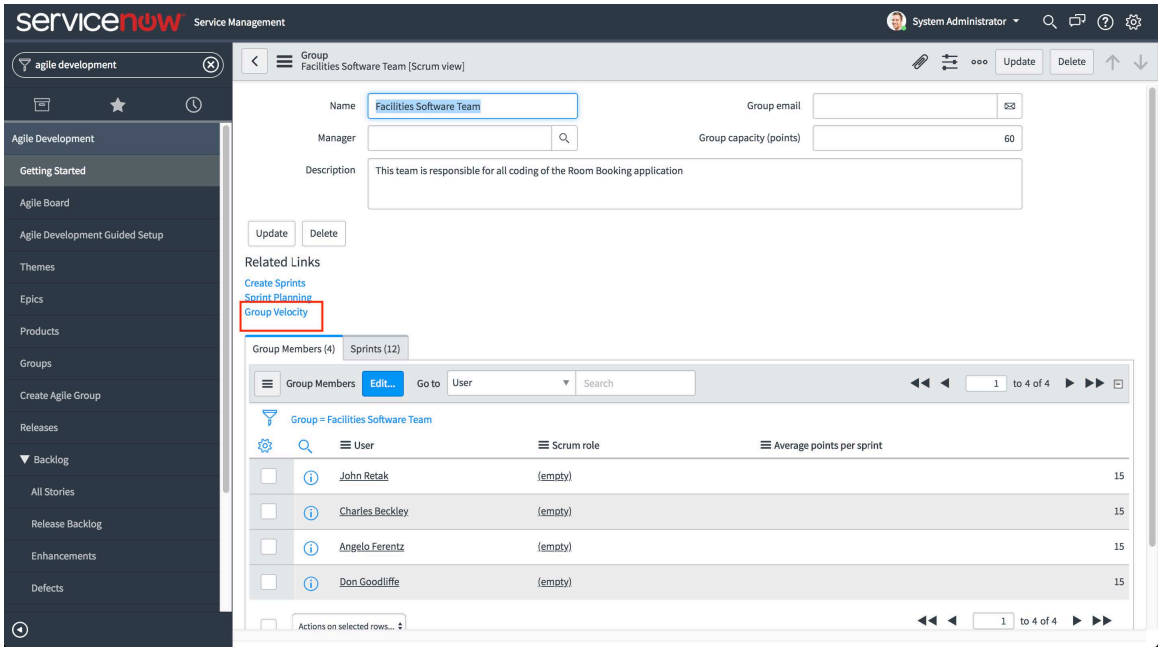


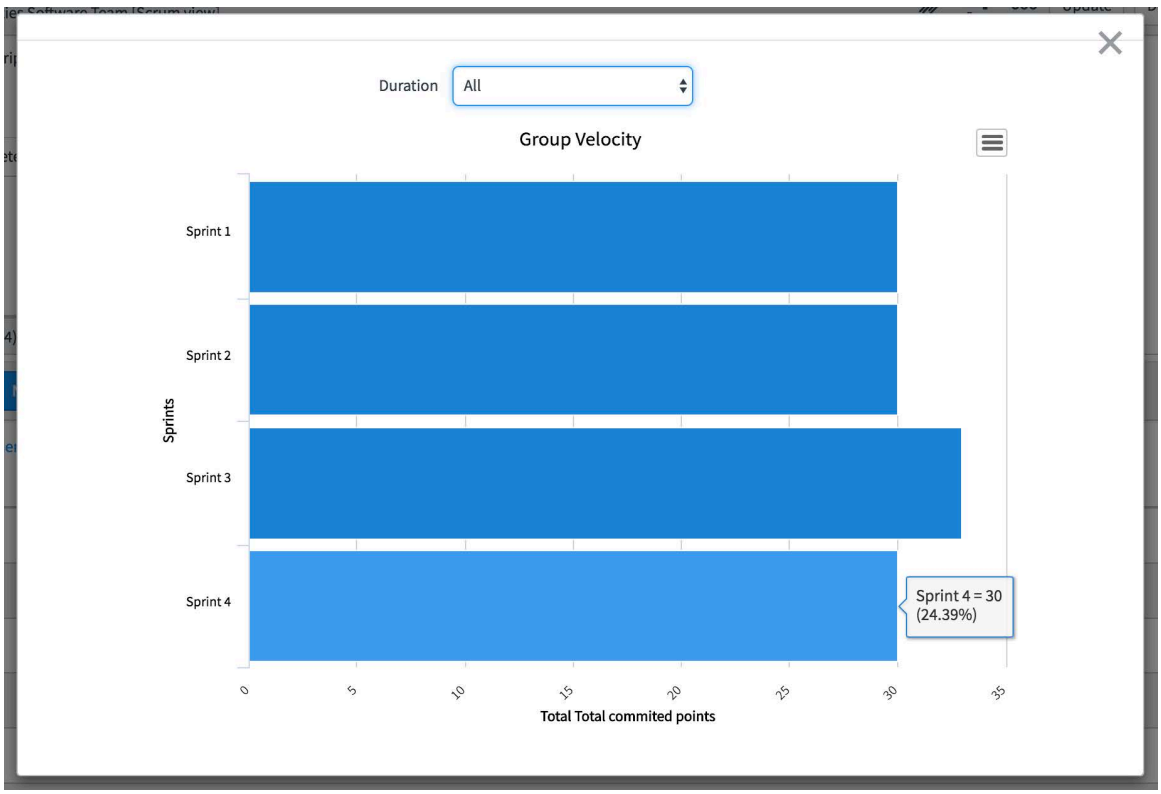
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7. For Group Velocity:
   a. Navigate to **Agile Development** > **Groups**.
   b. Review the velocity of the group. It must be same as it did prior to conversion.
   c. Complete the current sprint. It must display the velocity of group for the completed sprint in addition to the sprints that were completed before conversion.



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8. Once you verify the steps for one group, it is confirmed that the migration has completed successfully.
   You can repeat this procedure for all other teams one by one. This is a synchronous process, hence, you should perform these steps on one team at a time.

Agile Development 2.0 enhancements over Agile Development 1.0

Agile Development 2.0 offers a few enhancements over Agile Development 1.0.

Important:
Agile Development 1.0 and its features such as Sprint burndown chart and release burndown chart are deprecated and no longer available. Agile Development 2.0 provides the latest experience for supporting your Agile work methodology.

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These enhancements can be divided into the following categories:

- Data model enhancements from Agile Development 1.0 to Agile Development 2.0
- Usability enhancements from Agile Development 1.0 to Agile Development 2.0
- Functionality enhancements from Agile Development 1.0 to Agile Development 2.0

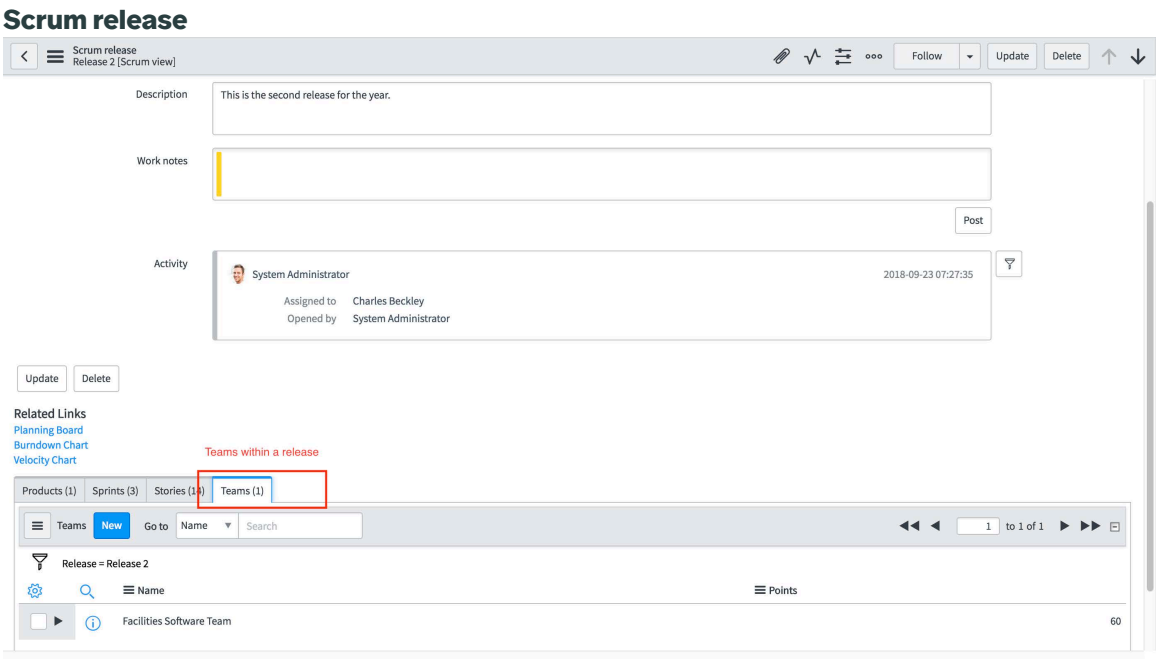
Data model enhancements from Agile Development 1.0 to Agile Development 2.0

Agile Development 2.0 offers a few data model enhancements over Agile Development 1.0.

Important:
Agile Development 1.0 and its features such as Sprint burndown chart and release burndown chart are deprecated and no longer available. Agile Development 2.0 provides the latest experience for supporting your Agile work methodology.

Use of the common platform construct — Assignment Group

To map an agile team (scrum team), Agile Development 1.0 uses a separate entity called the Release Team table (scrum_pp_team). This entity is associated to a release entity as displayed in the following screen shot.

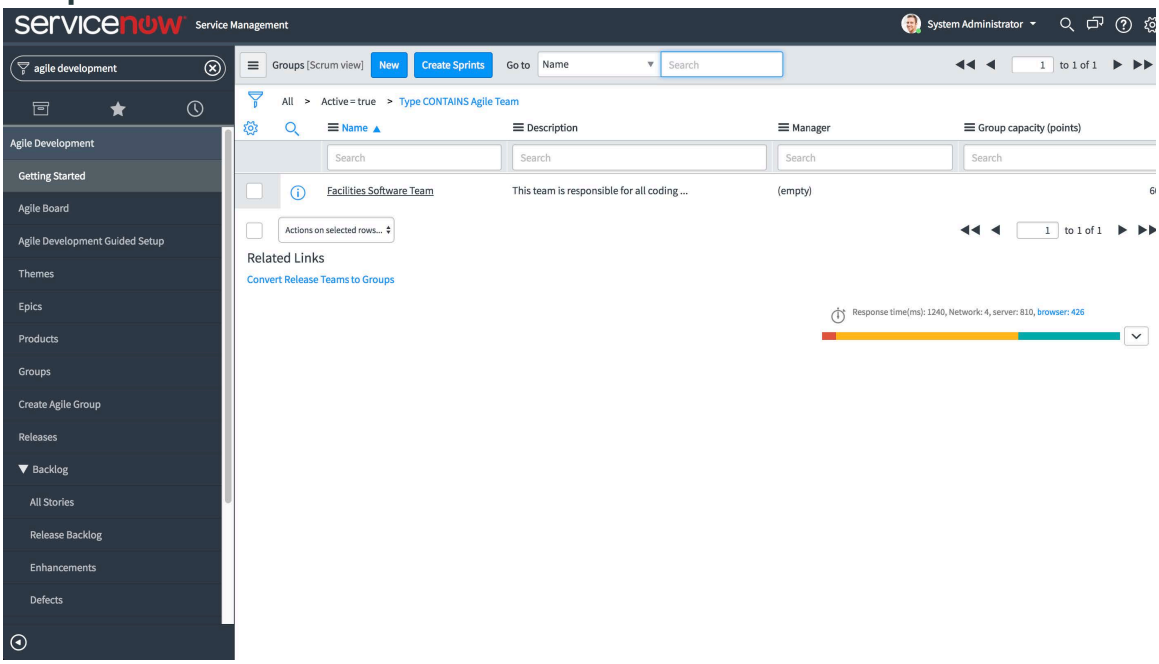


All other tasks on platform such as incidents, problems, changes, projects rely on the assignment group entity to make assignments to a group. Group managers can run reports on an assignment group to gain insight into the work assigned to their groups.

To standardize the use of a group across platform even for scrum work such as stories and tasks, the standard construct Assignment Group is used as opposed to the standalone entity Release Team. Agile Development 2.0 uses assignment groups to map agile teams. An assignment group of type Agile Team is used for defining an agile team.

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Groups

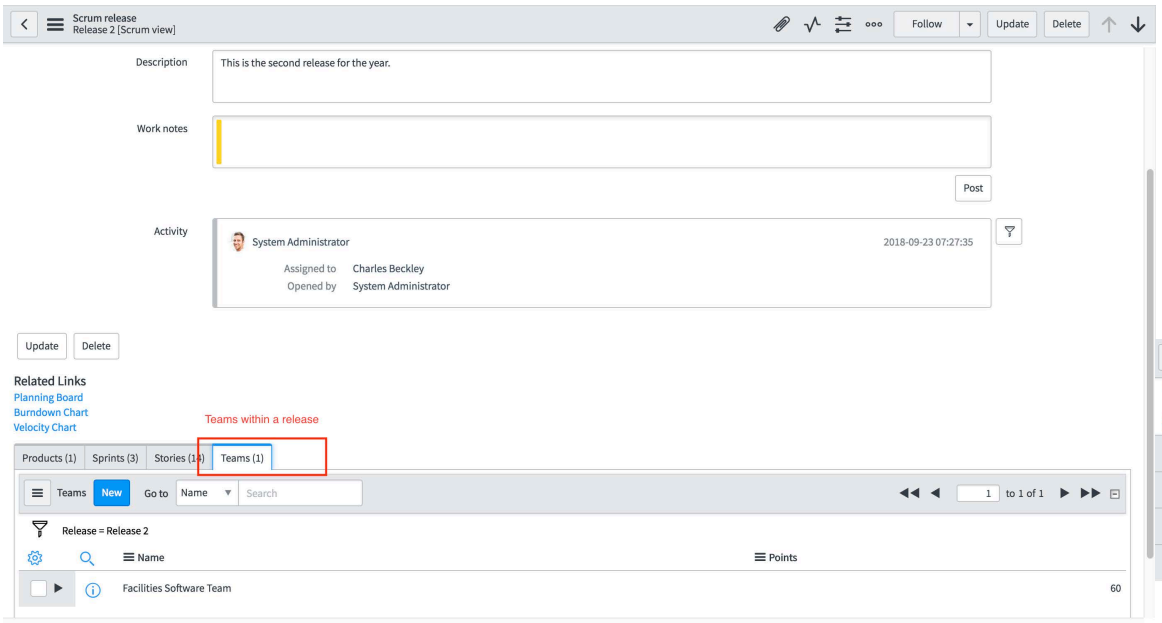


Agile team (group) need not be created for each release

With Agile Development 1.0, teams are to be created for each release and the teams are to be associated to each release. For example, if a scrum team called Team — Alpha works on multiple quarterly releases. You cannot create the team for one time and associate the team to any release, or release over release. Each time a new release is created, you must create a team with the same name and associate team to the release.

With Agile Development 2.0, groups are created independent of releases, and you can work on stories from multiple releases without recreating the group for every release.

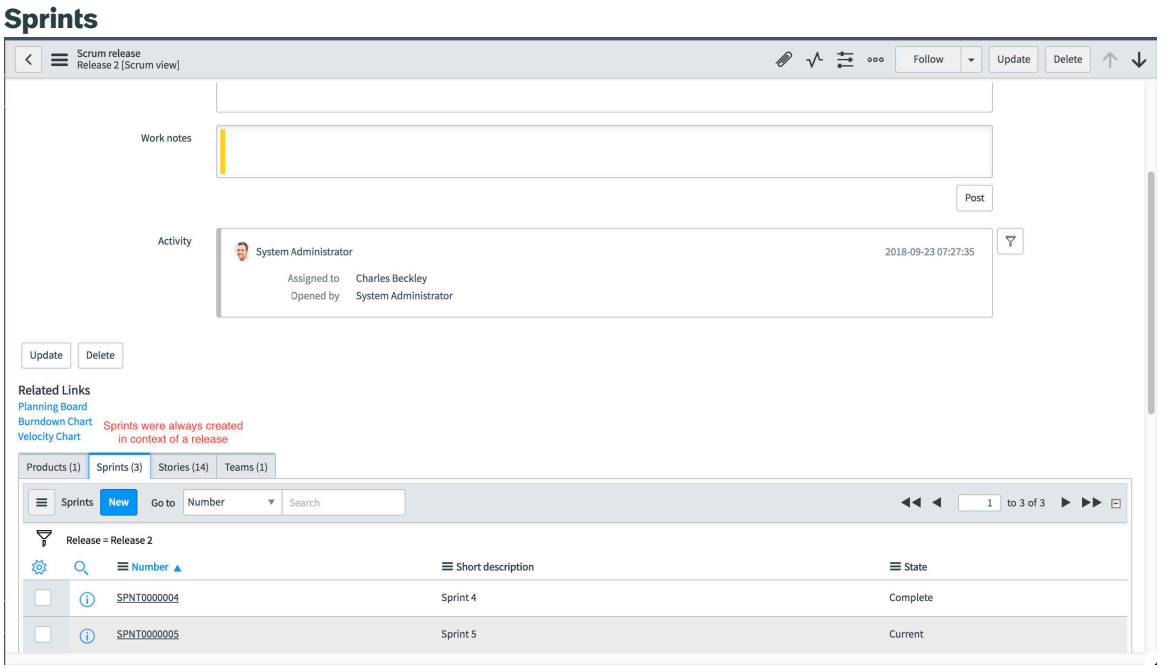
Scrum release



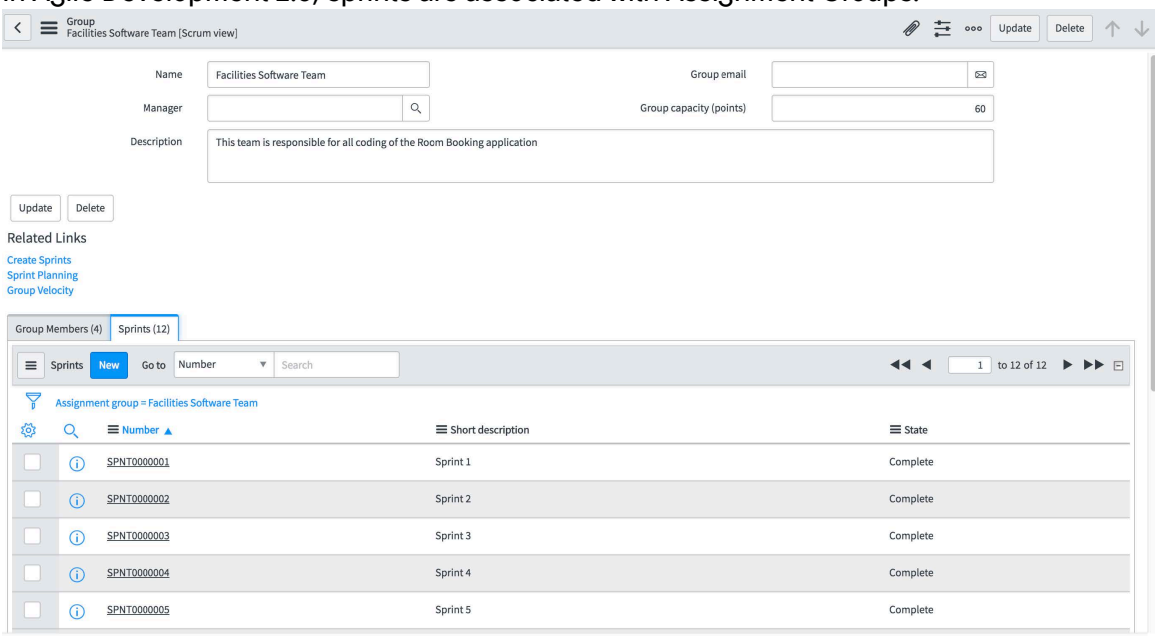
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Sprints can be created without a release

With Agile Development 1.0, creating a release is mandatory for creating sprints. Sprints cannot be created for a team independently. Agile Development 1.0 mandates the creation of a release for story execution via sprints. If there is no release, sprint cannot be populated on a story record.



In Agile Development 2.0, sprints are associated with Assignment Groups.



Team backlog can be maintained independent of release

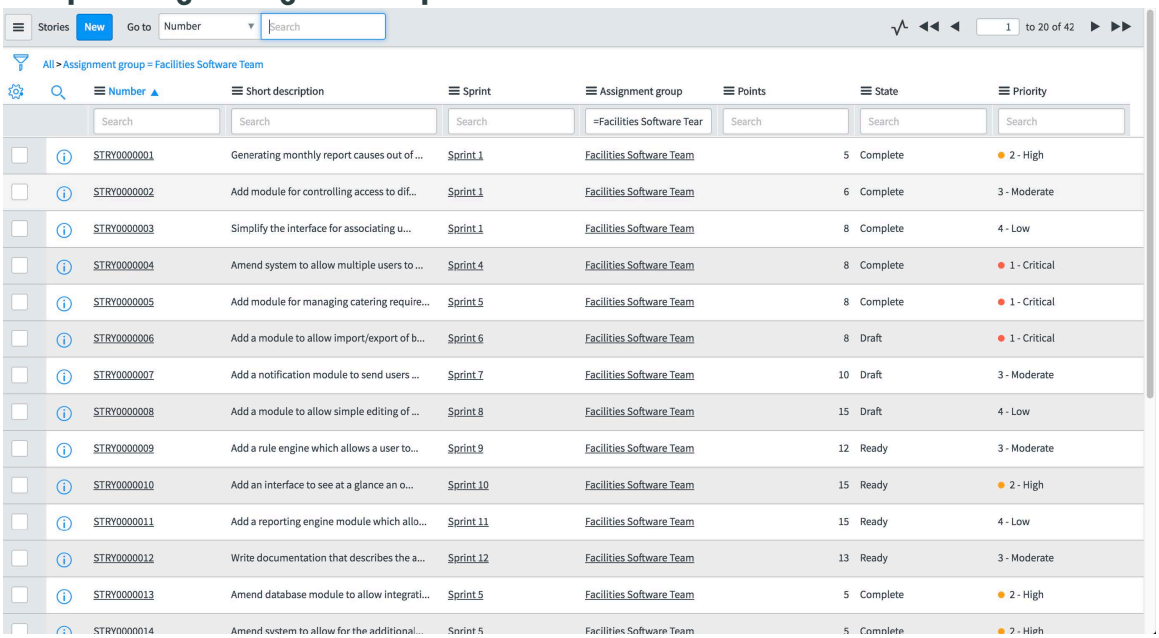
Typically, a team can have an ongoing team backlog release after release, it can pull stories from its backlog, and execute them through sprints in the release.

With Agile Development 1.0, a team cannot be defined without defining a release. Hence, team backlog cannot be maintained independent of a release.

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With Agile Development 2.0, an assignment group is not created within a release. It can be associated to the release, but not created within a release. Hence, an assignment group can maintain its own backlog.

Group backlog with Agile Development 2.0



Number	Short description	Sprint	Assignment group	Points	State	Priority
STRY0000001	Generating monthly report causes out of ...	Sprint 1	Facilities Software Team	5	Complete	2 - High
STRY0000002	Add module for controlling access to dif...	Sprint 1	Facilities Software Team	6	Complete	3 - Moderate
STRY0000003	Simplify the interface for associating u...	Sprint 1	Facilities Software Team	8	Complete	4 - Low
STRY0000004	Amend system to allow multiple users to ...	Sprint 4	Facilities Software Team	8	Complete	1 - Critical
STRY0000005	Add module for managing catering require...	Sprint 5	Facilities Software Team	8	Complete	1 - Critical
STRY0000006	Add a module to allow import/export of b...	Sprint 6	Facilities Software Team	8	Draft	1 - Critical
STRY0000007	Add a notification module to send users ...	Sprint 7	Facilities Software Team	10	Draft	3 - Moderate
STRY0000008	Add a module to allow simple editing of ...	Sprint 8	Facilities Software Team	15	Draft	4 - Low
STRY0000009	Add a rule engine which allows a user to...	Sprint 9	Facilities Software Team	12	Ready	3 - Moderate
STRY0000010	Add an interface to see at a glance an o...	Sprint 10	Facilities Software Team	15	Ready	2 - High
STRY0000011	Add a reporting engine module which allo...	Sprint 11	Facilities Software Team	15	Ready	4 - Low
STRY0000012	Write documentation that describes the a...	Sprint 12	Facilities Software Team	13	Ready	3 - Moderate
STRY0000013	Amend database module to allow integrati...	Sprint 5	Facilities Software Team	5	Complete	2 - High

Association between Release and Group

As there is no direct relation between a release and a group in Agile Development 2.0 (groups are independent and do not have to create groups for each release), the m2m_release_group_list table has been introduced. This table stores the association of a group with a release. This association is not used for sprint generation, but is used to derive the capacity of a release.

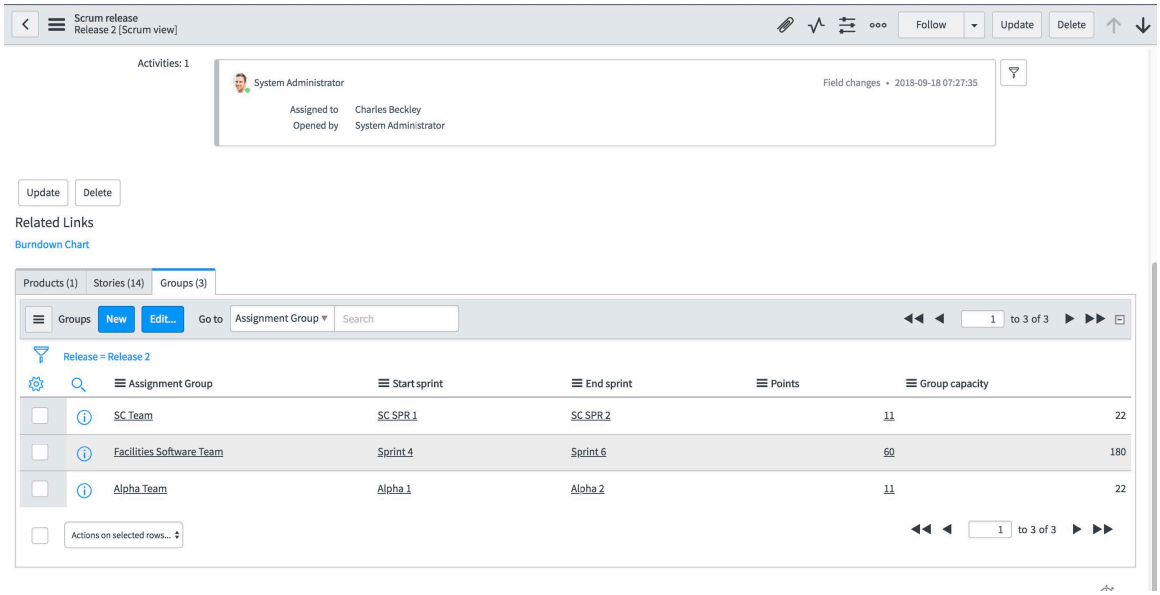
Specify the number of sprints for which the group works in a release. From the capacity of the team, the capacity of the release is derived.

m2m_release_group

Team	Start Sprint	End Sprint	Points (each sprint)	Total Group Capacity For Release
A	A_Sprint 1	A_Sprint 3	30	90 (3*30)
B	B_Sprint 1	B_Sprint 4	40	160 (4*40)

Total Release Capacity = 90+ 160 = 250 points

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Functionality enhancements from Agile Development 1.0 to Agile Development 2.0

Agile Development 2.0 offers a few functionality enhancements over Agile Development 1.0.

Important:
Agile Development 1.0 and its features such as Sprint burndown chart and release burndown chart are deprecated and no longer available. Agile Development 2.0 provides the latest experience for supporting your Agile work methodology.

Integration with Test Management 2.0

Agile Development 2.0 is integrated with Test Management 2.0. This integration allows you to define tests for your stories, and run the tests before a story is marked as complete.

Note:
This integration is available from the London release.

Integration with Agile Development — Unified Backlog

Agile Development — Unified Backlog is integrated with Agile Development 2.0. This integration allows you to maintain a centralized backlog containing records of different task types, such as defects, problems, incident tasks, and stories. It facilitates in prioritizing and sequencing of different task type records in one location, saving you steps. It removes the overhead of converting records to stories.

Note:
This integration is available from the London release.

Usability enhancements from Agile Development 1.0 to Agile Development 2.0

Agile Development 2.0 offers a few usability enhancements over Agile Development 1.0.

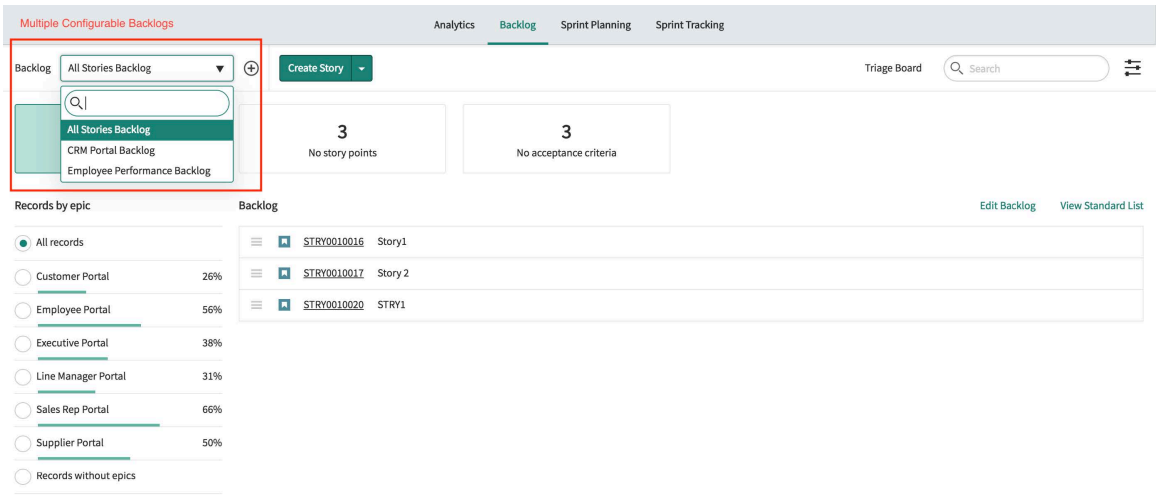
Important:
Agile Development 1.0 and its features such as Sprint burndown chart and release burndown chart are deprecated and no longer available. Agile Development 2.0 provides the latest experience for supporting your Agile work methodology.

Manage and groom your backlog

Flexible backlog definition

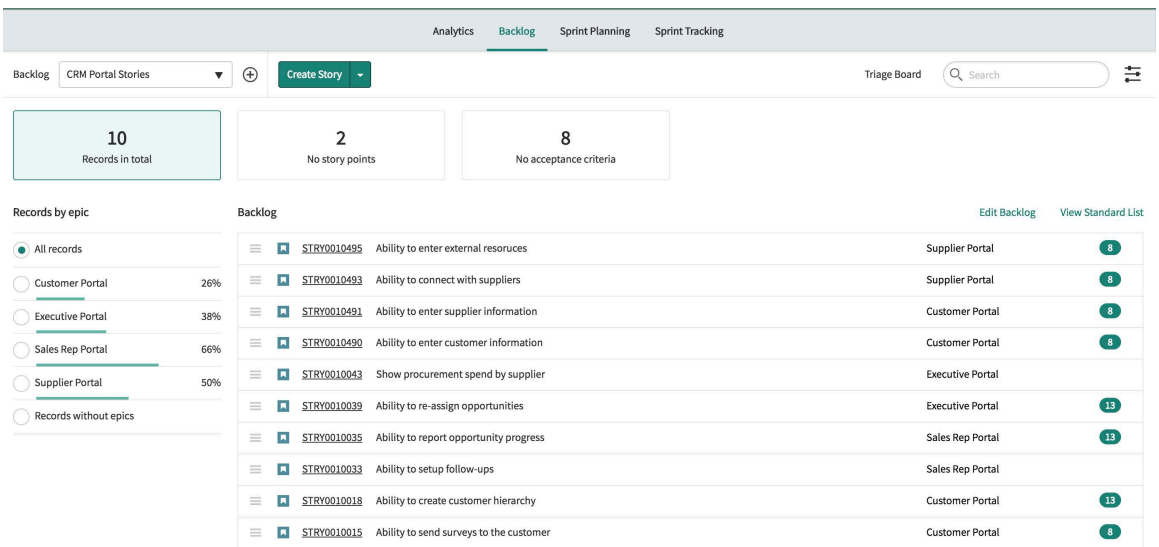
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Agile Development 2.0 enables you to define backlogs. For example, you can create different backlogs by products or teams, or combine backlogs for one or more epics.



Backlog grooming

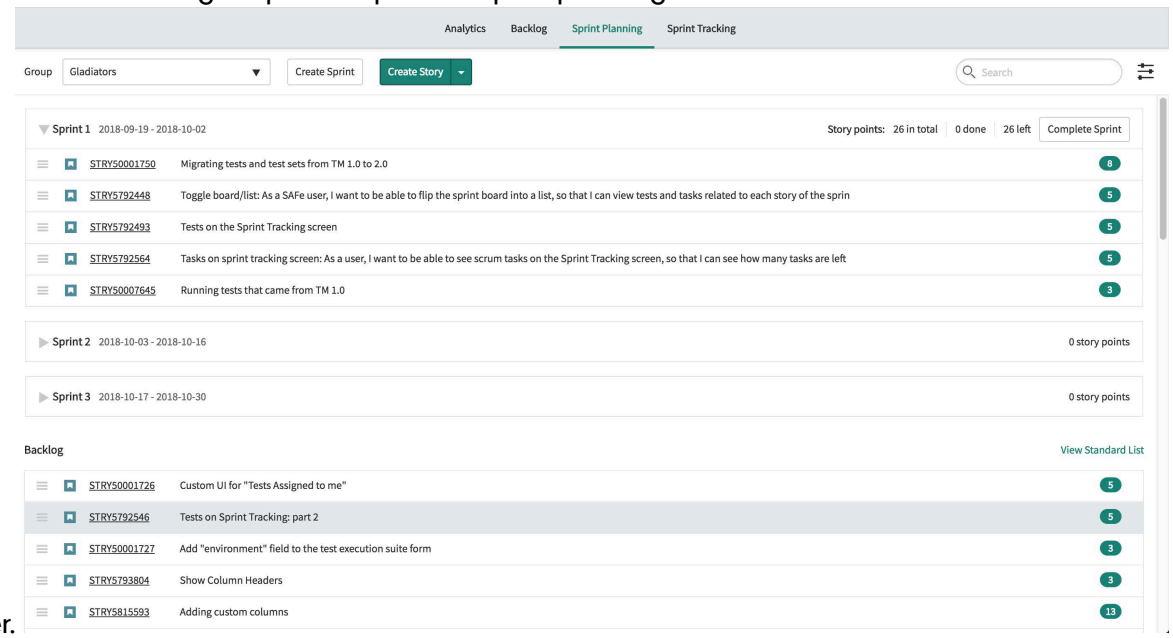
Agile Development 2.0 provides an advanced view for your backlog, where you can drag stories to rank them. Also, you can view backlogs by epics and get analytics about the overall backlog situation. For example, analytics of stories without acceptance criteria.



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Enhanced sprint planning experience

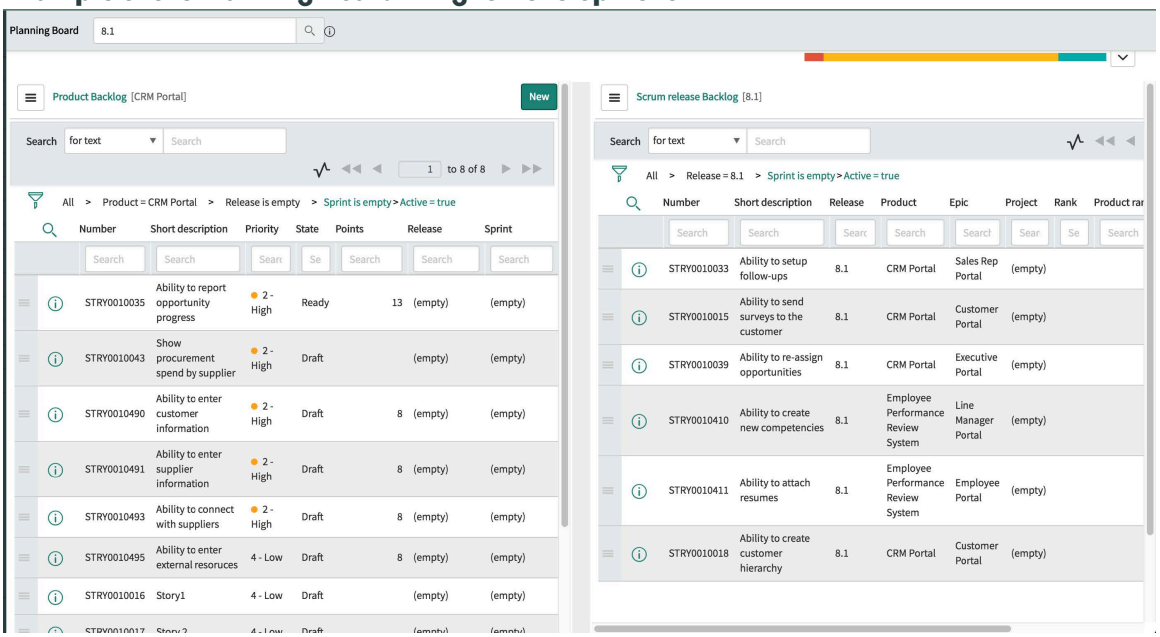
Agile Development 2.0 provides a single view for your backlog and sprints. Drag stories from the backlog to sprints to perform sprint planning in an interactive manner.



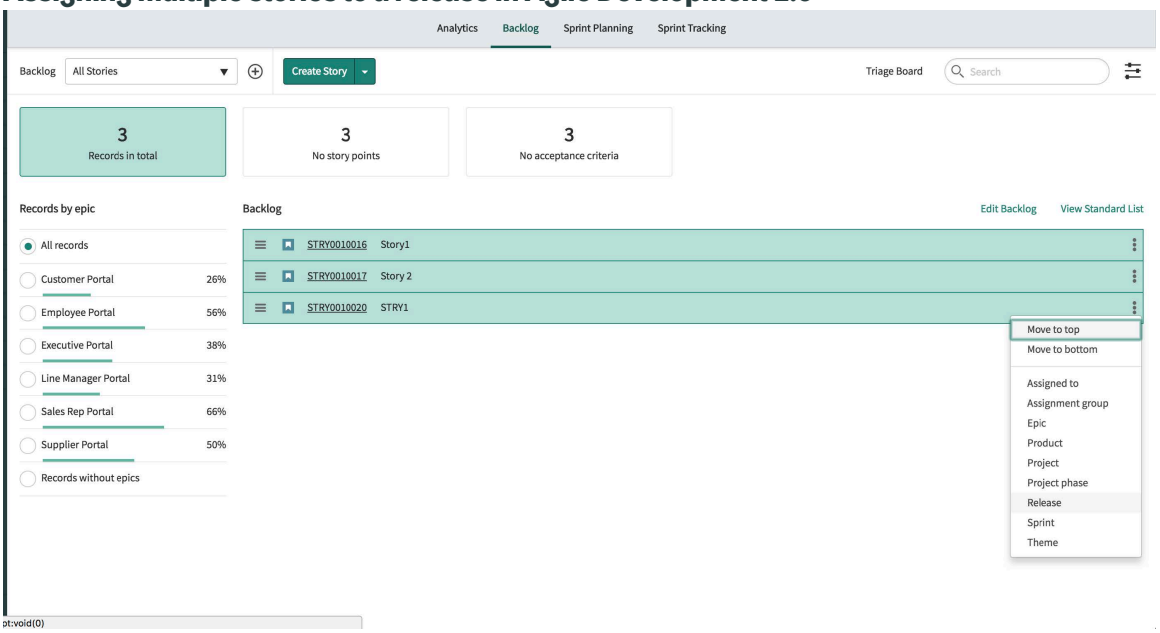
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Note:
Though the Planning Board in Agile Development 1.0 has not been deprecated, you can use the **Sprint Planning** tab in Agile Development 2.0. For release planning, use the **Backlog** tab in which you can multi-select stories, and assign them to a release.

Example of the Planning Board in Agile Development



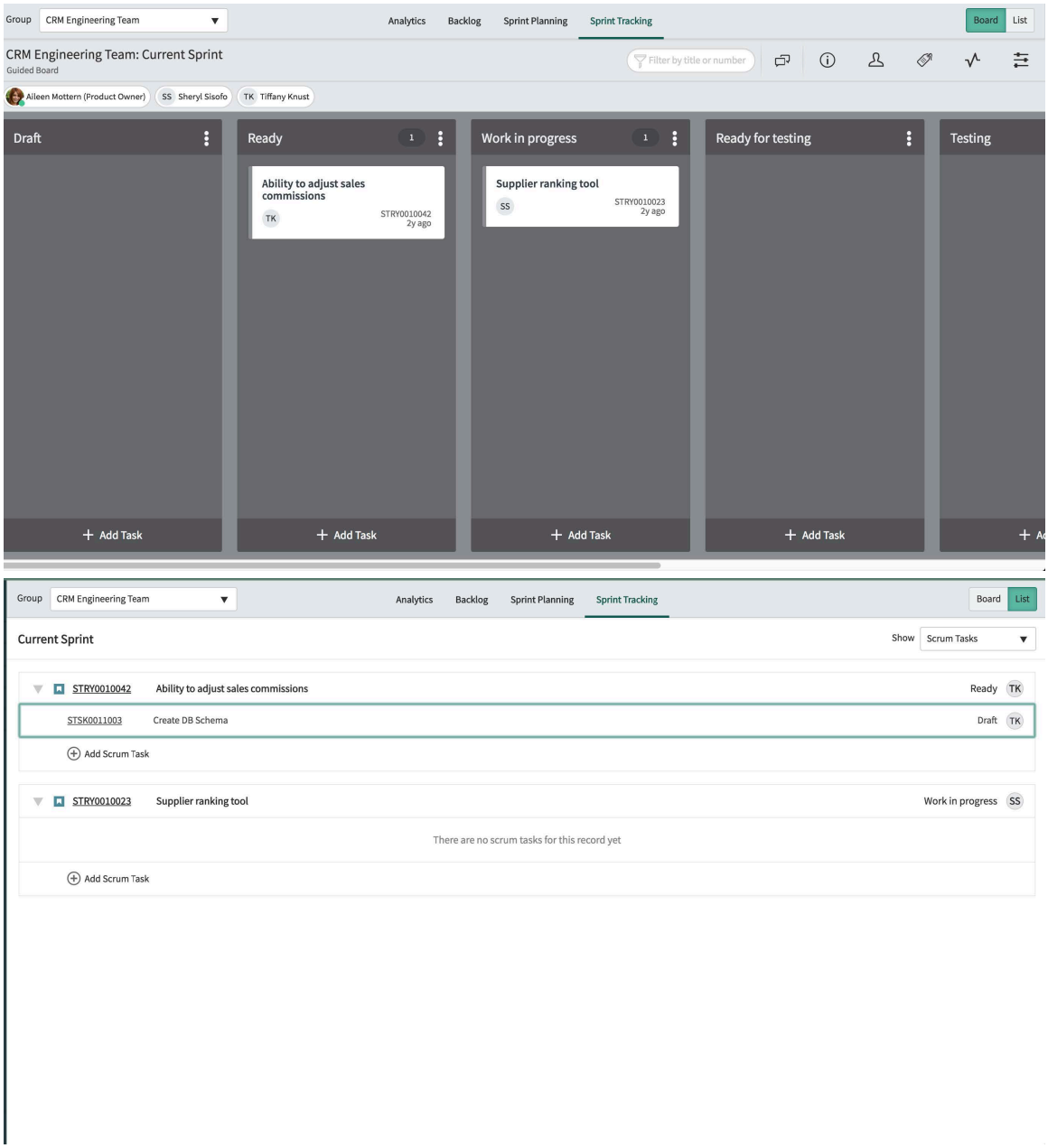
Assigning multiple stories to a release in Agile Development 2.0



Sprint Tracking

Agile Development 2.0 leverages the visual task boards feature to track the progress of stories in a sprint. It also provides the ability to create scrum tasks from the tracking view.

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Note:
The Task Progress Board UI does not appear as a tab in Agile Development 2.0. You may type Task Progress Bar in search panel in navigator to invoke the UI, for tracking the progress of scrum tasks.

Review a utility customization for Agile Development 2.0

Use the Agile_2.0_Upgrade_Diagnostics update set to analyze your customizations on the platform artifacts (such as form layout, list layout, business rules, and client scripts) that are modified as part of the Agile Development 2.0 enhancements. Delete the customizations prior to upgrade.

Before you begin

- Role required: admin
- Download the Agile_2.0_Upgrade_Diagnostics update set.

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About this task

Important:
Agile Development 1.0 and its features such as Sprint burndown chart and release burndown chart are deprecated and no longer available. Agile Development 2.0 provides the latest experience for supporting your Agile work methodology.

Procedure

1. Click the **Retrieved Update Sets** module.
2. Click **Import Update Set from XML**.
3. Select and upload the update set.
4. Preview and commit the update set.
5. Navigate to **Agile Development 2.0** > **Upgrade Diagnostics** > **View Diagnostics**.
   Displays all the artifacts from Agile Development 1.0 that have been modified on the instance and on Agile Development 2.0.
6. Click the file name of the artifact, or click the **View Update** link to review the latest update on the file.

   For example, in the following screenshot, a system script has been customized. Hence, further analysis is required to delete the customization, restore, or reapply the customization after an upgrade.

Example of a customized system script



List of platform artifacts modified after upgrading to Agile Development 2.0

Post migration, you can review the list of artifacts that are modified in Agile Development 2.0.

Important:
Agile Development 1.0 and its features such as Sprint burndown chart and release burndown chart are deprecated and no longer available. Agile Development 2.0 provides the latest experience for supporting your Agile work methodology.

- sys_ui_list_control_3f85b6907f00000135a05e41c7547354,
- sys_ui_list_control_3f8607b47f0000012aaff213c654be45,
- sys_ui_list_control_6daa4a777f000001007607d32a0b44f0,
- sys_ui_list_control_7d3d1f917f000001798fc58141419300,
- sys_ui_list_control_aa8a1aae7f000001432d0e1142a85c2d,
- sys_ui_list_control_aa8a4bbe7f0000013955267820458 7f7,
- sys_ui_list_control_aa8ace2f7f000001514936314eb4c441,
- sys_ui_list_control_aa8b47f57f000001024db35639e9239d,
- sys_ui_list_control_aa8b87c57f0000014da26c6926295c45,
- sys_ui_list_control_aa8bb1fe7f000001566e2efad03b5d1d,

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- sys_ui_list_control_f2e3f8447f0000010e16b6f2131e4c51,
- sys_ui_list_control_f2e421e97f0000015fecc4e84539ca3f,
- sys_ui_list_control_f31a7ea37f00000111797ad94bfc17a7,
- sys_ui_form_sections_6dd15dd77f00000146435a3f9ec1b5c2,
- sys_ui_form_sections_6dd2cbb17f0000016bc846fa867d9527,
- sys_ui_form_sections_6dd47d6f7f0000011b43299d37b79da0,
- sys_ui_section_09c7f68d0a0a2c39447a64370c6851bb,
- sys_ui_section_09c9c4eb0a0a2c390ca461bae347c0c8,
- sys_ui_section_6da8bbff7f00000119f52f9d2ba74f7e,
- sys_ui_section_6dc344847f0000017a3badab86eae0f4,
- sys_ui_section_6dc409c57f0000016dd1fbecc461c7b9,
- sys_ui_section_6dd15e0a7f00000104ddce3e4fec5457,
- sys_ui_section_6dd2cbc97f0000016b6662d744a1766c,
- sys_ui_section_6dd47d857f000001783b95cc64af46a4,
- sys_ui_section_8756880b7f00000147213f08234c9a57,
- sys_ui_section_87569f2d7f00000116c556f5821ae434,
- sys_ui_section_8757b94d7f0000011c1ae8aa30062c20,
- sys_ui_section_87580cdb7f00000145cff7762bcac315,
- sys_ui_section_a19b5086c1252a7b3632553861b5440c,
- sys_ui_section_a7ee48bfc1252a7b377ac0507a9a6dc8,
- sys_ui_section_aa8a5d967f0000010d9bd63883019d20,
- sys_ui_list_rm_epic_rm_epic_scrum,
- sys_ui_list_rm_epic_scrum_theme_scrum,
- sys_ui_list_rm_scrum_task_rm_story_scrum,
- sys_ui_list_rm_sprint_rm_release_scrum_scrum,
- sys_ui_list_rm_story_rm_epic_scrum,
- sys_ui_list_rm_story_rm_release_scrum_scrum,
- sys_ui_list_rm_story_rm_sprint_scrum,
- sys_ui_list_rm_story_scrum_theme_scrum,
- sys_ui_list_scrum_group_permissions_scrum_theme_scrum,
- sys_ui_list_scrum_user_permissions_scrum_theme_scrum,
- sys_ui_list_rm_release_scrum_scrum,
- sys_ui_list_rm_sprint_scrum,
- sys_ui_list_rm_epic_scrum,
- sys_ui_list_rm_story_scrum,
- sys_ui_list_rm_release_scrum_null,
- sys_ui_list_rm_sprint_null,
- sys_ui_list_rm_epic_null,
- sys_ui_list_rm_story_null,

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- sys_ui_related_rm_defect_scrum,
- sys_ui_related_rm_doc_scrum,
- sys_ui_related_rm_epic_scrum,
- sys_ui_related_rm_release_scrum_scrum,
- sys_ui_related_rm_release_scrum,
- sys_ui_related_rm_sprint_scrum,
- sys_ui_related_rm_story_scrum,
- sys_ui_related_rm_test_scrum,
- sys_ui_related_rm_defect_null,
- sys_ui_related_rm_doc_null,
- sys_ui_related_rm_epic_null,
- sys_ui_related_rm_release_scrum_null,
- sys_ui_related_rm_release_null,
- sys_ui_related_rm_sprint_null,
- sys_ui_related_rm_story_null,
- sys_ui_related_rm_test_null,
- sys_ui_list_control_3f85b6907f00000135a05e41c7547354,
- sys_ui_section_87569f2d7f00000116c556f5821ae434,
- sys_ui_section_8757b94d7f0000011c1ae8aa30062c20,
- sys_ui_section_87580cdb7f00000145cff7762bcac315,
- sys_ui_section_a7ee48bfc1252a7b377ac0507a9a6dc8,
- sys_ui_section_aa8a5d967f0000010d9bd63883019d20,
- sys_ui_list_rm_story_null,
- sys_ui_list_rm_sprint_scrum,
- sys_ui_list_rm_story_scrum,
- sys_ui_related_rm_release_scrum_scrum,
- sys_ui_related_rm_sprint_scrum,
- sys_ui_section_0ffe390037412000dadaa3549dbe5d0d,
- sys_ui_list_rm_story_project,
- sys_ui_list_rm_story_sprint_planning,
- sys_ui_list_rm_epic_sys_ref_list,
- sys_ui_list_rm_story_release_backlog,
- sys_ui_list_control_0b28c540ef301000a7450fa3f82256a4,
- sys_app_module_0e28cb14ef941000a7450fa3f8225643,
- sys_app_module_0b57e8009f503100598a5bb0657fcfae,
- sys_app_module_b5b5b092871031003706db5eb2e3ec5b,
- sys_app_module_d5d3212593320200ea933007f67ffb36,
- sys_app_module_f0ca98ca874321003706db5eb2e3ecdd,
- sys_app_module_f1e8dc8a874321003706db5eb2e3ecfa,

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- sys_app_module_2117c480ef012000a7450fa3f82256fc,
- sys_app_module_30154714ef941000a7450fa3f82256ef,
- sys_app_module_437d1419ef41200099620fa3f822560c,
- sys_app_module_6d691477efb42000a7450fa3f8225612,
- sys_app_module_5697aaa0efd41000a7450fa3f8225682,
- sys_app_module_876add92ef931000a7450fa3f82256c9,
- sys_app_module_97fd7218ef541000a7450fa3f8225648,
- sys_app_module_ae802859ef41200099620fa3f8225656,
- sys_app_module_b47c5091ef41200099620fa3f8225688,
- sys_app_module_0a68918e37031000dadaa3549dbe5dd4,
- sys_app_module_237c98d5ef41200099620fa3f82256e5,
- sys_app_module_297d5419ef41200099620fa3f82256e9,
- sys_app_module_2b80e819ef41200099620fa3f82256a6,
- sys_app_module_487f9459ef41200099620fa3f82256db,
- sys_app_module_4c836231ef002000a7450fa3f8225612,
- sys_app_module_5600c718ef541000a7450fa3f8225636,
- sys_app_module_717d1419ef41200099620fa3f82256ed,
- sys_app_module_7580e499ef41200099620fa3f8225675,
- sys_app_module_b17e9819ef41200099620fa3f8225692,
- sys_app_module_db7f1099ef41200099620fa3f822564e,
- sys_app_module_eb7dd019ef41200099620fa3f8225611,
- sys_ui_policy_6c5665c293030200ea933007f67ffb18,
- sys_ui_policy_823c84a6ef271000a7450fa3f8225653,
- sys_ui_policy_128dc58293030200ea933007f67ffbb3,
- sys_ui_policy_49dc0ca093030200ea933007f67ffb0c,
- sys_ui_policy_830b62d6877121003706db5eb2e3ec6d,
- sys_ui_policy_cb2b8826ef271000a7450fa3f82256b3,
- sys_ui_policy_d8476e96877121003706db5eb2e3eca3,
- sys_ui_policy_267d5c2aef271000a7450fa3f8225636,
- sys_ui_policy_63a823ecefb31000a7450fa3f8225627,
- sys_ui_action_22ada00a93330200ea933007f67ffbd5,
- sys_ui_action_e89e773593330200ea933007f67ffbb7,
- sys_ui_action_f6ea06e2870321003706db5eb2e3ec7d,
- sys_ui_action_view_f9e0ee3393330200ea933007f67ffb38,
- sys_ui_action_96bd90b28f1321001a83cfd827bdee4a,
- sys_ui_action_c4ac45a147332100846e7eaecb9a7150,
- sys_ui_action_c5c37126ef202000a7450fa3f8225650,
- sys_ui_action_dd4398b937301000dadaa3549dbe5db8,
- sys_ui_action_eaaae247873321003706db5eb2e3ec61,

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- sys_ui_action_706b5e96ef301000a7450fa3f82256a2,
- sys_ui_action_7c972317ff231000dadaefff0efe1e62,
- sys_ui_action_8aba60e6ef96200099620fa3f8225645,
- sys_ui_action_93d4b3423701200054b6a3549dbe5d25,
- sys_ui_action_d07eddaa37202000dadaa3549dbe5d46,
- sys_ui_action_d67cdea1c32030003d2ae219cdba8f60,
- sys_ui_action_db07e836c320310028d7d56bc3d3ae2c,
- sys_ui_action_e2018d4237502000dadaa3549dbe5d32,
- sys_ui_action_ee01494237502000dadaa3549dbe5dec,
- sysrule_view_203b7ce58f3221001a83cfd827bdee67,
- sysrule_view_43bdcd758f3221001a83cfd827bdee78,
- sysrule_view_522cfce58f3221001a83cfd827bdeeb6,
- sysrule_view_6b8dcd758f3221001a83cfd827bdee3b,
- sysrule_view_9c4c79709f203100598a5bb0657fcf7d,
- sys_script_client_3d260d71873221003706db5eb2e3ec47,
- sys_script_client_f086b853873121003706db5eb2e3ec11,
- sys_script_client_cdf24c2493030200ea933007f67ffb90,
- sys_script_client_e1ea25e193002200ea933007f67ffbff,
- sys_script_2cc257b0373321001a8326877e41f1d0,
- sys_script_235ccb809f203100598a5bb0657fcfea,
- sys_script_3a06ffd59f322100598a5bb0657fcf40,
- sys_script_6940d94fef902000a7450fa3f8225689,
- sys_script_b0490d9047103100846e7eaecb9a7165,
- sys_script_c5dcb4f09f203100598a5bb0657fcffb,
- sys_script_21d6b274ef202000a7450fa3f822565d,
- sys_script_8cd24091ef52200099620fa3f8225619,
- sys_script_9f298c85efa1200099620fa3f82256ba

Activate Agile Development — Unified Backlog

You can activate the Agile Development — Unified Backlog plugin (com.snc.sdlc.agile.multi_task) if you have the admin role.

Before you begin

Activate Agile Development 2.0.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

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3. Select **Install** to start the installation process.

> **Note:**
> When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Related topics

Agile Development — Unified Backlog

Quick start tests for Agile Development 2.0

Validate that Agile Development 2.0 still works after you make any configuration change such as apply an upgrade or develop an application. Copy and customize these quick start tests to pass when using your instance-specific data.

> **Danger:**
> By default, the system property that is used to run automated tests is disabled to prevent you from accidentally running these tests on a production system. To avoid data corruption or an outage, run tests only on development, test, and other non-production instances. See Enable or disable executing Automated Test Framework tests.

Agile Development 2.0 quick start tests require activating the Agile Development 2.0 plugin (com.snc.sdlc.agile.2.0) and the Agile Development 2.0 - ATF Tests plugin (com.snc.sdlc.agile.2.0.atf).

Agile Development 2.0 quick start test suite

Test	Description	Release version
Verify that global rank is populated when a story is created	Verify the global rank of a story after creation.	Madrid
Verify that closing a sprint with active stories is prevented	Verify that a sprint with active stories cannot be closed.	Madrid
Verify that sprints cannot overlap in the same group	Verify that sprints in the same group do not overlap.	Madrid
Verify that sprint points are updated	Verify that changes to stories produce accurate sprint point totals.	Madrid
Verify that only one sprint in a group can have the current state	Verify sprint statuses.	Madrid
Verify sprint end date is after the sprint start date	Verify sprint start and end dates.	Madrid
Verify that any update on story rolls up to Epic	Verify that adding, estimating, removing, deleting, updating, or cancelling a story updates	Orlando

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Agile Development 2.0 quick start test suite (continued)

Test	Description	Release version
	the epic-level roll-ups correctly.	
Verify changes to the scope of a current sprint do not alter the value of the Total Committed Points	Verify that the value of Total Committed Points does not change with change in the scope of a sprint after its state is changed to Current.	Orlando
Verify active flag is set false when Agile Story state is changed to Completed/ Cancelled	Verify that active flag of an Agile story is set to the following: • False, if the state is changed to Completed or Cancelled • True, for all other states	Orlando
Verify that updating the team/ group capacity overrides the capacity on all the future sprints	Verify that any update to the **Group capacity** field of the assignment group results in the following changes to the **Group capacity** field of the various sprints associated with this assignment group: • For the sprints that are in the Draft and Planning state: ○ The group capacity is updated to the new value. ○ The **Group capacity** field is editable. • For the sprints in the Current, Complete, or Cancelled state: ○ The group capacity remains the old value. ○ The **Group capacity** field is read-only. For the sprints in the Draft or Planning state, you can individually edit the group capacity of the sprint anytime later. This would not change the group capacity of the assignment group associated with this sprint.	Paris

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Agile Development 2.0 quick start test suite (continued)

Test	Description	Release version
Verify create and edit functionality of an epic backlog on the scrum program board	• Verify that you can create an epic backlog for scrum programs from the Backlog tab of Agile Board. • Verify that you can update an existing epic backlog for scrum programs from the Backlog tab of Agile Board. • The epics listed in the backlog must belong to the selected epic backlog.	Quebec
Verify a Demand is converted to a scrum story	If the PPM Standard plugin (com.snc.financial_planning_pmo) is active, verify that a Demand can be converted to an Agile 2.0 story using the **Create Story** related link on the Demand form. For more information on how to create an Agile 2.0 story from a demand, see Create an artifact from a demand.	Quebec
Verify a Demand is converted to a scrum epic	If the PPM Standard plugin (com.snc.financial_planning_pmo) is active, verify that a Demand can be converted to an Agile 2.0 epic using the **Create Epic** related link on the Demand form. For more information on how to create an Agile 2.0 epic from a demand, see Create an artifact from a demand.	Quebec

Related topics

Quick start tests

Using Agile Development 2.0

Learn how to use the features of Agile Development 2.0 to efficiently manage your product development life cycle.

Create a release in Agile Development 2.0

Create a release to start associating the stories and scrum tasks of your product development to the release in Agile Development 2.0.

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Before you begin
Role required: scrum_release_planner, scrum_admin

About this task
Use the Releases module to create a release record to start planning for your upcoming release.

A release has a start and end date during which several development iterations are completed. Releases are created by a product owner and contain user stories, sometimes from multiple products, and can also involve multiple teams. The stories associated to a release form its release backlog.

Procedure
1. Navigate to **All** > **Agile Development** > **Releases**.
2. Select **New** in the record list.
   Alternatively, if you already created Product records in Agile Development 2.0, you can use the Releases related list to open the new release form.
3. On the form, fill in the fields.

New release form

Field	Description
Number	System-generated unique number for the release.
State	Current state of the release. The default is **Draft**.
Total committed points	Sum of all story points from the stories associated with this release.
Release capacity	Sum of group capacity of all the assignment groups associated with the release. Group capacity of an assignment group for a release is calculated as: `Group capacity * Number of sprints in the release for that group` Release capacity is updated only when the **Start sprint** and **End sprint** fields are populated for the groups in the **Groups** related list in the release record.
Planned start date	Estimated start date of the release.
Planned end date	Estimated end date for the release.
Assigned to	User assigned to the release. Release must be assigned to a scrum user, such as a release planner or product owner, whose role allows rights to create and edit releases.
Short Description	Brief description of the release.
Description	Detailed description of the release.
Work notes	Updates about the work being performed on the release. This field is updated by the **Assigned to** user as the work progresses on the release.

4. Select **Submit**.

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What to do next
Start planning your release by associating products, stories, and the assignment groups to this release record. Use the related lists available in the release record for these actions.

For information on the related lists of a release, see Related lists for a Release in Agile Development 2.0

Create a theme in Agile Development 2.0

Create a theme in Agile Development 2.0 to group stories of different products together for an abstract goal.

Before you begin
Role required: scrum_product_owner, scrum_release_planner, scrum_admin

Procedure

1. Navigate to **All** > **Agile Development** > **Themes**.
2. Select **New**.
   Alternatively, you can open the new theme form by using:
   - Backlog Planning or Sprint Planning tabs of the Agile board
   - Themes related lists of a Product record
3. On the form, fill in the fields.

New theme form

Field	Description
Number	System-generated unique number for the theme.
Name	Name for the theme that states the high-level business case.
Product	Product with which this theme is associated. You can associate a theme with just one product at a time.
Short Description	Brief description of the theme.
Description	Detailed description about the theme.

4. Select **Submit**.

What to do next
Add epics and stories to the theme using the related lists available in the Theme record. For more information, see Related lists for a Theme in Agile Development 2.0

Create a product in Agile Development 2.0

Create a product to represent a feature or functionality important to customers. A product can contain themes, epics, and stories that describe these enhancements from the perspective of a user.

Before you begin
Role required: scrum_product_owner, scrum_release_planner, scrum_admin

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Procedure

1. Navigate to **All** > **Agile Development** > **Products**.
2. Select **New**.

   Alternatively, you can use the Products related list of a Release record to open the form for a new product.
3. On the form, fill in the fields.

Product form

Field	Description
Name	Name of the product.
Short Description	Description of the product that briefly explains its features and mentions the theme and groups associated to it.
Product owner	User responsible for managing the development and releases for the product.

4. Select **Submit**.

What to do next

Use the related lists of the Product record to associate releases, themes, epics, stories, and assignment groups with it. For more information, see Related lists for a Product in Agile Development 2.0.

Assignment groups in Agile Development 2.0

Learn the requirements to create and manage your assignment groups in Agile Development 2.0.

Creating assignment groups

https://player.vimeo.com/video/1070078725?h=f04196c519&badge=0&autopause=0&player_id=0&app_id=58479

A user with the admin role can create assignment groups of the type **Agile Team**. Your scrum teams are represented by these agile groups, which you can use to assign to work items such as stories and epics. For more information, see Create an assignment group in Agile Development 2.0.

Adding members to assignment groups

- New customers: After an agile group is created, you can request your admin to add members to the group.
- Existing customers: If you upgraded to the Xanadu release, a user with the scrum_admin role or the scrum_master role can add members to your agile group.

> **Note:**
> You can restrict this function just to the admin by creating the *scrum.disallow_scrum_add_group_member* property and setting it to **true**. For information on how to create a property, see Add a system property.

For information on the procedure to add members to groups, see Add members to an assignment group in Agile Development 2.0

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Capacity of an assignment group

For each group member, a default number of story points can be defined. At the group level, the sum of these story points determines the group capacity.

Create an assignment group in Agile Development 2.0

Create an assignment group of the type Agile Team so that you can assign these groups to a product or a release.

Before you begin

Role required: admin

About this task

https://player.vimeo.com/video/1070078725?h=f04196c519&badge=0&autopause=0&player_id=0&app_id=58479

Procedure

1. Navigate to **All** > **Agile Development** > **Create Agile Group**.
2. On the form, fill in the fields.

Agile Group form

Field	Description
Name	Name of your assignment group.
Description	Brief description of the assignment group. You can indicate the products or the releases that this groups works on.

3. Select **Submit**.
   Assignment group is created and the form reopens with additional fields, related links, and related lists.
4. **Optional:** Fill in additional fields.

Group form

Field	Description
Manager	Manager of the group
Group capacity (points)	Number of points a group can accommodate in each sprint.
Group email	Email address of the group.

Result

The Agile assignment groups are created and stored in the Groups [sys_user_group] table and the **Type** of these groups is set to **Agile Team**.

What to do next

- Add members to an assignment group in Agile Development 2.0.
- Use the related links and lists to create sprints and plan the sprint activities for your group. For more information, see Related links and lists of assignment group in Agile Development 2.0.

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Convert a release team to a group (only for existing customers having release teams)

Convert an existing release team to an assignment group of type Agile Team so that you can assign them to a product or a release.

Before you begin
Role required: admin

About this task
Agile Development 2.0 does not use Release Teams. Existing users who have created release teams must convert the existing teams to assignment groups.

Procedure

1. Navigate to **All** > **Agile Development** > **Groups**.
2. Click the **Convert Release Teams to Groups** related link.
3. Select the team that you want to convert to an assignment group.
4. Click **Convert to Group**.

Result

- The release team is available as assignment group from **Agile Development** > **Groups**.
- The members of the release team are copied to the assignment group.

Add members to an assignment group in Agile Development 2.0

Add members who would work on the scrum stories and tasks.

Before you begin
Role required: admin
Any user that you want to add to the assignment group must have the scrum_user role.

Procedure

1. Navigate to **All** > **Agile Development** > **Groups**.
2. Open the group to which you want to add members.
3. From the Group Members related list, select **Edit**.
4. Add the required scrum user.

Result
The selected scrum user is listed in the Group Members related list.

Create an epic in Agile Development 2.0

Define the high-level requirements of the features that you want to develop by creating epics in Agile Development 2.0.

Before you begin
Role required: scrum_story_creator, scrum_admin

About this task
Create epics in Agile Development 2.0 and organize them in a hierarchy of parent and children. You can associate an epic to a product, theme, or configuration item (an item or service that is affected).

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Procedure

1. Navigate to **Agile Development** > **Epics**.
2. Select **New**.

   Alternatively, you can open the new epic form using the Agile board, from a theme record, or from a product record.

   You can also convert an existing active story into an epic. For details, see Related links and lists for a Story in Agile Development 2.0.

3. On the form, fill in the fields.

Epic form

Field	Description
Number	System-generated number for the epic.
Product	Product associated with this epic. You can associate an epic with only one product at a time.
Priority	Priority of the epic.
State	State of the epic. Select one of the following: **Draft** The epic requirements, such as the detailed description, are still being drafted. **Ready** The epic is ready for pickup by the product team. The product manager and the scrum team can break the epic down into stories. **Work in Progress** The development team is working on the stories for epic and recording the changes in the work notes field. **Complete** The development and testing efforts on all the stories and any child epics for the epic are complete. **Cancelled** The epic has been canceled. This field is automatically set to **Draft**.
Short Description	Brief description of the epic.
Description	Detailed description of the epic.
Work notes	Notes about the work done on the epic.
Total story count	Number of stories in the epic.
Completed count	Number of completed stories in the epic.

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Field	Description
Percent complete by count	Percentage of completed work in the epic. Story count is used to calculate this value.
Total estimate	Sum of the estimates of all stories in the epic.
Completed estimate	Sum of the estimates of all the completed stories in the epic.
Percent complete by epic	Percentage of completed work in the epic. Story estimate is used to calculate this value.
Missing estimate	Number of stories in the epic that are missing estimates.
Top program	Program mapped to the scrum work enabling top-down hybrid planning. This field is visible in the Scrum view of the epic form if you activate the PPM Standard plugin (com.snc.financial_planning_pmo).

Fill in the Planning section if you want to create benefit plans for the epic. This section is available in the Benefit view of the epic form.

4. Click **Submit**.

What to do next

- Add child epics or stories to the epic:
  - Create a child epic for this epic by selecting **New** from the Child Epics related list.
  - Add stories to this epic by selecting **New** from the Stories related list. For more information, see Create a story in Agile Development 2.0.

    An epic can have one or more stories, but a story can belong to only one epic at a time.
- You can also associate epics to a project in Project Portfolio Management from the Epics related list.

  This related list appears only when the value for the **Execution Type** field is selected as **Agile** and the Agile Development 2.0 plugin is installed.

Create a monetary benefit plan for an epic

Epic benefit plans capture the potential benefits accrued by the epic when the epic is executed. Create a monetary benefit plan to specify the estimated benefit in a category spanning one or more fiscal periods.

Before you begin

Role required: scrum_master, scrum_product_owner, or scrum_admin

About this task

The monetary benefit plan breakdown records are automatically created when you save the benefit plan.

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Procedure

1. Navigate to **All** > **Agile Development** > **Epics**.
2. Open the required epic.
3. Select **View** > **Benefit** from the Additional actions menu ( ).
4. On the form, fill in the required fields in the Planning section.
   This section is available when the Benefit view is selected.

Planning section of the Epic form

Field	Description
Planned start date	Projected start date for the epic. The planned start date can be the current date or a future date.
Planned end date	Projected end date for the epic. The planned end date must be after the planned start date.
Planned benefit	Benefit value that is rolled up from the benefit breakdown.
Actual start date	Actual start date for the epic. The actual start date can be on or before the planned start date.
Actual end date	Actual end date for the epic. The actual end date can be before the planned start date but not before the actual start date.
Actual benefit	Actual benefit value that is rolled up from the actual benefit in the benefit breakdown.

5. Save the record.
6. In the Monetary Benefit Plans related list, click **New**.
7. On the form, fill in the fields.

Benefit Plan form

Field	Description
Name	Descriptive name of the benefit plan.
Work	Epic to which the benefit plan belongs.
Sponsor	Sponsor for the epic.
Category	Type of benefit: ○ **Hard**: Benefits that can be measured in terms of revenue. ○ **Soft**: Benefits that are measured in terms of value.
Sub category	Sub-categories of hard and soft benefits. The selection in **Category** field determines the selections available in this field.
Benefit type	Type of benefit. Select **Monetary benefits**.
Offset type	Field to indicate when the benefits start realizing. Select any of the following options:

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Field	Description
	○ **None**: The default value is None. When you select **None**, you need to manually enter the benefit plan start and end fiscal periods. ○ **Milestone**: After completion of a milestone. ○ **Start Date**: At the start of the epic. ○ **End Date**: After the epic ends. If the value in the selected offset type changes, the benefit plan start date shifts accordingly. For example, if the offset type is set to **End Date** and the end date of the epic changes, the benefit plan start date shifts to align with the new end date of the epic.
Milestone	Epic milestones to which the benefit plan belongs. The field appears if you select **Milestone** in the **Offset type** field.
Milestone start date	Start date of the selected milestone. The field appears if you select **Milestone** in the **Offset type** field.
Work start date	Start date of the epic. The field appears if you select **Start Date** in the **Offset type** field.
Work end date	End date of the epic. The field appears if you select **End Date** in the **Offset type** field.
Offset	Number of periods before or after the offset type when the benefit plan starts. For example, if the offset type is selected as **End Date** and the offset is -2, the benefit plan is two periods prior to the epic end date. If the epic end date shifts, the benefit plan start date shifts to two periods prior to the new epic due date.
Duration in periods	The length, in periods, of the benefit plan.
Start fiscal period	Starting fiscal period. Populated based on the value in the Offset field relative to the selected **Milestone**, **Work start date**, or **Work end date**, and **Duration in period** values. The field is editable if you select **None** in the **Offset type** field. When you change the start fiscal period, the associated benefit breakdown values also change.
End fiscal period	Ending fiscal period. Populated based on the value in the Offset field relative to the selected **Milestone**, **Work start date**, or **Work end date**, and **Duration in period** values. The field is editable if you select **None** in the **Offset type** field. When you change the end fiscal period, the associated benefit breakdown values also change.
Associated benefit	Non-monetary benefit that is associated to this monetary benefit plan.

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Financials section of the Benefit Plan form

Field	Description
Entered benefit	Benefit incurred from the epic specified in terms of entered currency.
Entered currency	Currency in which you want the benefit plan to be created.
Functional currency	Currency that is obtained from the **glide.system.locale** property.
Total planned benefit	Estimated amount of potential benefit of the epic.
Benefit in functional currency	Benefit incurred from epic in terms of functional currency. The value in this field changes if the **Entered currency** is different from the functional currency.
Actual benefit	Actual benefit that is incurred from the epic. This value is rolled up from the **Actual benefit** field of all the benefit plan breakdowns.
Recurring	Option to indicate that the benefit is recurring for all the fiscal periods in the benefit plan.

8. Click **Submit**.

What to do next
On the Benefit Plan form, view the benefit breakdown by fiscal period in the Monetary Benefit Plan Breakdowns related list.

Update a monetary benefit plan breakdown for an epic

Update a monetary benefit plan breakdown record that specifies the estimated and actual benefits, at a granular level, for specific fiscal periods.

Before you begin
Role required: scrum_master, scrum_product_owner, or scrum_admin

Procedure
1. Navigate to **All** > **Agile Development** > **Epics**.
2. Open the required epic.
3. Select **View** > **Benefit** from the Additional actions menu ( ).
4. Click the Monetary Benefit Plans related list.
5. Open the required monetary benefit plan.
6. In the Monetary Benefit Plan Breakdowns related list, click the information icon ( ) for a monetary benefit plan breakdown.
7. Click **Open Record**.
8. On the Monetary Benefit Plan Breakdown form, view and update the enabled fields.

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9. Click **Update**.

Create a non-monetary benefit plan for an epic

Epic benefit plans capture the potential non-financial benefits accrued by the epic when the epic is executed. Create a non-monetary benefit plan to specify the estimated benefit in a category spanning one or more fiscal periods.

Before you begin

Role required: scrum_master, scrum_product_owner, or scrum_admin

About this task

The non-monetary benefit plan breakdown records are automatically created when you save the benefit plan by selecting **Automatic** or **Manual** in the **Breakdown Type** field. The non-monetary benefit plan breakdown records specify the estimated and actual non-financial benefits at a granular level for specific fiscal periods, such as FY16: April and FY16: May. The Non-monetary Benefit Plan Breakdowns related list shows the aggregated benefits for estimated and actual non-financial benefits for each fiscal period for the epic.

Procedure

1. Navigate to **All** > **Agile Development** > **Epics**.
2. Open the required epic.
3. Select **View** > **Benefit** from the Additional actions menu ( ).
4. On the form, fill in the required fields in the Planning section.
   This section is available when the Benefit view is selected.

Planning section of the Epic form

Field	Description
Planned start date	Projected start date for the epic. The planned start date can be the current date or a future date.
Planned end date	Projected end date for the epic. The planned end date must be after the planned start date.
Planned benefit	Benefit value that is rolled up from the benefit breakdown.
Actual start date	Actual start date for the epic. The actual start date can be on or before the planned start date.
Actual end date	Actual end date for the epic. The actual end date can be before the planned start date but not before the actual start date.
Actual benefit	Actual benefit value that is rolled up from the actual benefit in the benefit breakdown.

5. Save the record.
6. Click the Non-monetary Benefit Plans related list.
7. To create a non-monetary benefit plan, click **New**.
8. On the form, fill in the fields.

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Benefit Plan form

Field	Description
Name	Descriptive name of the benefit plan.
Work	Epic to which the benefit plan belongs.
Sponsor	Sponsor for the epic.
Category	Type of benefit: ○ **Hard**: Benefits that can be measured in terms of revenue. ○ **Soft**: Benefits that are measured in terms of value.
Sub category	Subcategories of hard and soft benefits. The value of the **Category** field determines the choices available in this field.
Benefit type	Type of benefit. Select **Non-monetary benefits**.
Offset type	Field to indicate when the benefits start to be realized. Select any of the following options: ○ **None**: The default value is None. When you select **None**, you must manually enter the benefit plan start and end fiscal periods. ○ **Milestone**: After completion of a milestone. ○ **Start Date**: At the start of the epic. ○ **End Date**: After the epic ends. If the value in the **Offset type** field changes, the benefit plan start date shifts accordingly. For example, if the **Offset type** field is set to **End Date** and the end date of the epic changes, the start date of the benefit plan shifts to align with the new end date of the epic.
Milestone	Epic milestones to which the benefit plan belongs. This field appears only when **Milestone** is selected from the **Offset type** field.
Milestone start date	Start date of the selected milestone. This field appears only when **Milestone** is selected from the **Offset type** field.
Work start date	Start date of the epic. This field appears only when **Start Date** is selected from the **Offset type** field.
Work end date	End date of the epic. This field appears only when **End Date** is selected from the **Offset type** field.
Offset	Number of periods before or after the offset type when the benefit plan starts. For example, if the offset type is selected as **End Date** and the offset is -2, the benefit plan is two periods prior to the epic end date. If the epic end date changes, the benefit plan start date shifts to two periods prior to the new epic due date.
Duration in periods	The length, in periods, of the benefit plan.
Start fiscal period	Starting fiscal period. This field is populated based on the value in the **Offset** field relative to the selected **Milestone**, **Work start date**, or **Work end date**, and **Duration in periods** field values.

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Field	Description
	This field is editable if you select **None** in the **Offset type** field. When you change the start fiscal period, the associated benefit breakdown values also change.
End fiscal period	Ending fiscal period. This field is populated based on the value in the **Offset** field relative to the selected Milestone, Project or Demand start date, or Project or Demand end date, and Duration in period values. This field is editable if you select **None** in the **Offset type** field. When you change the end fiscal period, the associated benefit breakdown values also change.
Associated benefit	Monetary benefit that is associated to this non-monetary benefit plan.

Non-monetary Details section of the Benefit form

Field	Description
Measure	Type of measure for the non-monetary benefit plan. The measure types are Count, Percentage, Hours, Days, and Score. Select the option **Yes/No** to track the benefits that are not quantifiable. When this option is selected, the only field available is **Benefits achieved**. You can select the check box to indicate that the benefits have been achieved.
Non-monetary entered benefit	Estimated value of the potential benefit. Any change in the planned benefit in the benefit plan updates the associated benefit breakdown values for future fiscal periods only.
Non-monetary planned benefit	Benefit value that is rolled up from the benefit breakdown.
Benefits achieved	Option to indicate if the benefit is achieved.
Breakdown type	Type of breakdown creation when you save the benefit plan. ○ **None**: No breakdowns are created. ○ **Automatic**: A Non-monetary Benefit Plan Breakdowns record is created automatically with data. The breakdown is calculated linearly. ○ **Manual**: A Non-monetary Benefit Plan Breakdown record is created automatically but without data in the **Entered benefit** column.

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Field	Description
Aggregation mode	Determines how the roll-up happens from breakdowns to the benefit plan and updates the values in the **Non-monetary planned benefit** and **Non-monetary actual benefit** fields. ○ **Sum**: Aggregates data from all breakdowns. ○ **Average**: Average value from all breakdowns. ○ **Most recent**: Recent breakdown value. ○ **Max**: Maximum value among the breakdowns. ○ **Min**: Minimum value among the breakdowns.
Non-monetary actual benefit	Actual benefit value that is rolled up from the actual benefit in the non-monetary benefit plan breakdown.

9. Click **Submit**.

What to do next

- On the Benefit Plan form, view the benefit breakdown by fiscal period in the Non-monetary Benefit Plan Breakdowns related list.
- Associate monetary and non-monetary benefit plans, so that you can capture the potential benefits (financial and non-financial) accrued by the epic for the hybrid benefit plans.

Update a non-monetary benefit plan breakdown for an epic

Update a non-monetary benefit plan breakdown record that specifies the estimated and actual benefits, at a granular level, for specific fiscal periods.

Before you begin

Role required: scrum_master, scrum_product_owner, or scrum_admin

Procedure

1. Navigate to **All** > **Agile Development** > **Epics**.
2. Open the required epic.
3. Select **View** > **Benefit** from the Additional actions menu ( ).
4. Click the Non-monetary Benefit Plans related list.
5. Open the required non-monetary benefit plan.
6. In the Non-monetary Benefit Plan Breakdowns related list, click the information icon ( ) for a non-monetary benefit plan breakdown.
7. Click **Open Record**.
8. On the Non-monetary Benefit Plan Breakdown form, view and update the enabled fields.
9. Click **Update**.

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Associate monetary and non-monetary benefit plans

Associate monetary and non-monetary benefit plans, so that you can capture the potential benefits (financial and non-financial) accrued by the epic for the hybrid benefit plans.

Before you begin
Role required: scrum_master, scrum_product_owner, or scrum_admin

About this task
You can associate a monetary benefit plan with a non-monetary benefit plan and vice versa.

Note:
When you delete a benefit plan, any relationship with the associated benefit plan is also removed.

Procedure
1. Navigate to **All** > **Agile Development** > **Epics**.
2. Open the required epic.
3. Select **View** > **Benefit** from the Additional actions menu ( ).
4. Select the Monetary Benefit Plans or Non-monetary Benefit Plans related list.
5. Select the information icon ( ) for a benefit plan that you want to associate.
6. Select **Open Record**.
7. On the Benefit Plan form, select **Associate new benefit**.
8. On the form, fill in the fields.
   For description of fields, see Create a monetary benefit plan for an epic and Create a non-monetary benefit plan for an epic.
9. Select **Save**.

Result
The selected benefit plan is associated with another plan.

What to do next
Select the **View Associated benefit plan** related link to view the associated benefit plan.

Generate labor costs for epics

View the labor cost expenses based on the resource assignments for your epics.

Before you begin
- The epic should have the resource assignments.
- Role required: sn_spm_financial_user

Procedure
1. Navigate to **All** > **Agile Development** > **Epics**.
2. Select the required epic.
3. Select the **Generate labor costs** related link.
   Refresh the page to view generated labor costs in the Cost Plan related list.

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Create a story in Agile Development 2.0

Create high-level definitions of your requirements in the form of stories in Agile Development 2.0. Manage and track your stories by associating them to a product, project, or release and by assigning them to an assignment group.

Before you begin

Role required: scrum_story_creator, scrum_admin

Procedure

1. Navigate to **All** > **Agile Development** > **Stories**.
2. Select **New**.
   Alternatively, you can create a Story from one of the following:
   - Backlog Planning or Sprint Planning tab of the Agile board.
   - Stories related list of a product, release, sprint, theme, or epic.
   - Defect or enhancement record.
3. On the form, fill in the fields.

> **Note:**
> Some of the fields on the Story form may appear filled depending on the option that you used to create the story.

Story form

Field	Description
Number	System-generated number for the story.
Theme	Theme associated with the story. A theme can have one or more stories, but a story can belong to only one theme at a time. Select the theme for this story from a list of themes that are associated with the **Product** field.
Epic	Epic associated with the story. An epic can have one or more stories, but a story can belong to only one epic at a time. Select an epic for this story from the epics that are associated with the **Product** field.
Type	Type of story. Choose from options such as Development, Documentation, Spike, and others.
Classification	Type of development that the story involves. This field is automatically set to **Feature**. This field has no connection to the **Defect** and **Enhancement** fields in the **Related Records** tab.
State	State of the story. Select one of the following:

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Field	Description
	○ **Draft**:The story requirements, such as the description and acceptance criteria, are still being drafted. ○ **Ready**: The story is ready for pickup by the development team. ○ **Work in Progress**: The development team is working on the story and recording the changes in the work notes field. ○ **Ready for Testing**: The story is ready for pickup by a tester. ○ **Testing**: The tester is testing the story based on the requirements provided in the story. ○ **Complete**: The development and testing efforts on the story are complete. ○ **Cancelled**: The story has been canceled. This field is automatically set to **Draft**.
Points	Number of points that indicate the estimated effort that is required to complete the story. A larger point value indicates that the story requires a greater amount of effort.
Priority	Priority assigned to the story. A product owner can use priorities to rank stories in the planning board.
Product	Product that this story is associated with.
Release	Release that this story is associated with. The release can be from the releases associated with the selected product.
Assignment group	Agile team that the story belongs to.
Sprint	Sprint that this story is associated with. This field is available only when a value is selected from the **Assignment group** field.
Assigned to	User who is working on the story. Users on this list have appropriate scrum roles.
Demand	Demand that this story is associated with. When the demand is converted to project, the demand stories move from demand to project. When a demand is converted to a story, the reference to the demand is displayed here.
Project	Project that this story is associated with.
Project phase	Name of the agile project phase that this story is associated with. This field is available only when a value is selected from the **project** field. If a project has only one phase, then the story is automatically tagged to that phase.

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Field	Description
	Note: An agile phase can have stories that belong to more than one group.
Blocked	An indicator to show that there are issues that prevent the story from progressing.
Short description	A brief description of the story.
Description	A detailed description of the story.
Acceptance criteria	The functional criteria or testing results that are required to move this story to the Complete state.
Work notes	Notes about the work done for this story.

Related Records section of the Story form

Field	Description
Defect	Defect that is associated with the story. This field is a reference field from the Defect [rm_defect] table. This field is required if the story is created for a defect. Click the search icon ( ) in this field to display the existing defects or to open a new defect. Only users with the feature_user role can open a defect. The admin must grant the feature_user role to all users who are expected to open defects in the Agile Development application. This field is the only location in the Agile Development application where records from the Defect [rm_defect] table appear. For more information on defects, see Reporting defects in Agile Development 2.0.
Enhancement	Enhancement associated with the story. This field is a reference field from the Enhancement [rm_enhancement] table. This field is required if the story is created for an enhancement. Click the search icon ( ) in this field to display the existing enhancement requests or to open a new enhancement. Only users with the feature_user role can open an enhancement. The admin must grant the feature_user role to all users who are expected to open enhancement requests in the Agile Development application.

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Field	Description
	This field is the only location in the Agile Development application where records from the Enhancement [rm_enhancement] table appear. For more information on enhancements, see Enhancement requests in Agile Development 2.0.

4. Select **Submit**.

Result

- The story is created and the form reopens with related links and lists.
- The story is listed in the backlog depending on the fields filled in the story form.

What to do next

- Use the related links and lists of the story to create scrum tasks for this story, or convert this story into an epic or split this story into two stories. For more information, see Related links and lists for a Story in Agile Development 2.0.
- Add dependencies for Agile Development 2.0 stories
- You can create a story with the same details as this story by using the **Insert** or **Insert and Stay** options from the story additional actions (☰).

  When you use **Insert and Stay**, the form of the newly created story stays open. You can modify the details of the story or create more stories with these details. On the Agile board, the new story is positioned right below the original story. The global rank of the new story is set accordingly.

  Note:
  Set the *glide.ui.task.insert* and *glide.ui.advance* properties to **true** to access these actions. These actions are not allowed on stories added from the triage board.

Add dependencies for Agile Development 2.0 stories

Add prerequisite and dependent items for stories in Agile Development 2.0 so that you can visualize these dependencies on the scrum planning board and plan your sprints accordingly.

Before you begin

Role required: scrum_story_creator, scrum_story_editor

Procedure

1. Navigate to **All** > **Agile Development** > **Stories**.
2. Open the story to which you want to add dependencies.
   Alternatively, you can use the scrum program board from the Agile board to open your story and add dependencies.
3. Add dependencies to the stories using the Prerequisite Stories or Dependent Stories related lists.

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- Prerequisite Stories is the list of all stories that must be complete before the current story.
- Dependent Stories is the list of all stories that depend on the completion of the current story.

4. Select **Save** and then select **Update**.

What to do next

You can visually analyze the dependencies of the stories using the scrum program board to help with your sprint planning.

1. Navigate to **All** > **Agile Development** > **Agile Board** > **Program** > **Planning**
2. Use the dependencies icon ( ) to show or hide dependencies between stories.

Note:
Access to the Scrum program board is available only with the Scrum Programs plugin (com.snc.sdlc.scrum_program).

Create a scrum task for Agile Development 2.0 stories

Create scrum tasks in Agile Development 2.0 to break down a story into manageable pieces for your team to work on. You can create one scrum task at a time or multiple scrum tasks at once.

Before you begin

Role required: scrum_story_creator, scrum_admin

About this task

Team members volunteer for tasks based on their skills and track the hours remaining daily. If the task is not complete within the planned hours, it can be further split into additional tasks. A story is not complete until all its tasks are complete.

This task explains how to create one scrum task at a time. To save time, you can create multiple scrum tasks at once. See Create multiple scrum tasks for stories in Agile Development 2.0.

Procedure

1. Navigate to **All** > **Agile Development** > **Stories**
2. Open a story that you want to create tasks for.
3. From the Scrum tasks related list, select **New**.
   Alternatively, you can create a scrum task using the Task board view of the Sprint tracking tab, on the Agile board.
4. On the form, fill the fields.

Scrum Task form

Field	Description
Number	System-generated number for the story.
Story	Displays the story associated with the scrum task.
Priority	Priority for the task.
Planned hours	Estimated number of hours to complete the task. A typical scrum task should take between 4 and 12 hours. If the task requires more than 12 hours, consider breaking it down into multiple tasks.

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Field	Description
Remaining hours	Estimated number of hours remaining to complete the scrum task. The assigned group member updates this value as work is progressing on the task.
Actual hours	After the task is complete, enter the number of hours the task actually took.
Type	Type of work involved.
State	Current state of the scrum task. The default for a new task is **Draft**.
Assignment group	Group that would work on this task. This field is automatically populated from the **Assignment group** of the story from which the task is created.
Assigned to	User working on the scrum task. This field is set to the story owner by default.
Blocked	Indicator to show that there are issues that prevent the scrum task from progressing.
Short description	Brief description of the scrum task.
Description	Detailed summary of the scrum task.
Work notes	Notes to indicate progress on the scrum task or issues blocking it.

5. Select **Submit**.

> **Important:**
> When a Scrum Task is created under a Story, the date fields on the Story become read-only.

Create multiple scrum tasks for stories in Agile Development 2.0

For your Agile Development 2.0 stories, create batches of different types of scrum tasks at a time, to save time.

Before you begin

Role required: scrum_story_creator, scrum_admin

About this task

Select a story that need scrum tasks and create all these tasks together. You can create tasks of different types such as Testing, Analysis, and others. All these tasks are created with the short description **ToDo...**. Open the task records later and fill in more details for the task.

Procedure

1. Navigate to **All** > **Agile Development** > **Stories**
2. Right-click a story number and select **Add Scrum Tasks**.
3. On the form, enter the number of scrum tasks to create for each task type.
   - Analysis
   - Coding
   - Documentation
   - Testing
4. Select **OK**.

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Result
A batch of tasks of the selected types is created with a short description of **ToDo...** and are listed in the Scrum Tasks related list of the story record.

What to do next
Open each scrum task record and fill in more details such as description, priority, and others. For field information of a Scrum Task form, see Scrum Task form.

Create a personalized backlog in Agile Development 2.0

Create filters to define which stories appear in your backlog in Agile Development 2.0.

Before you begin
Role required: scrum_product_owner

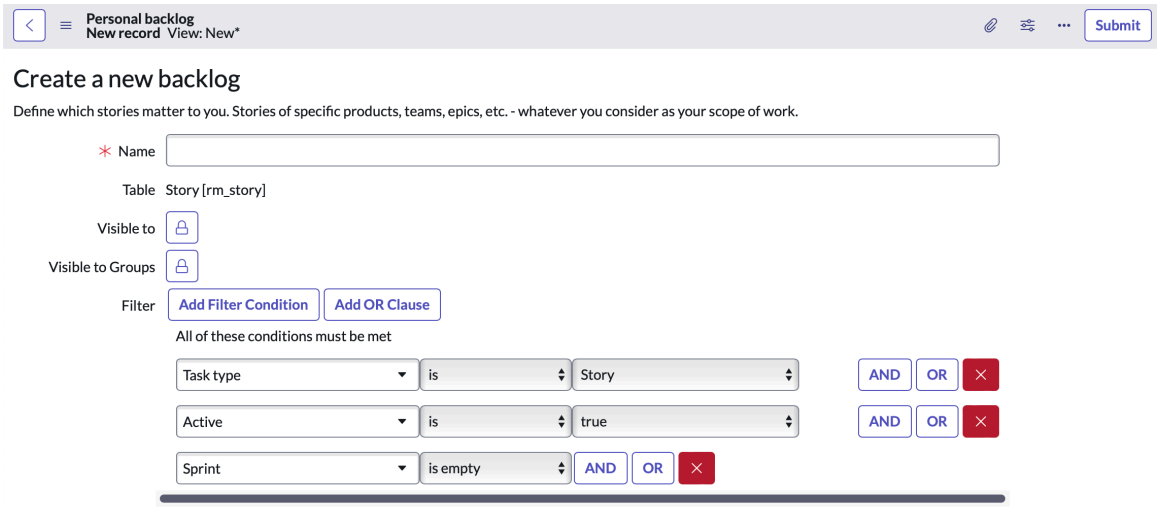
About this task
A backlog is a prioritized list of stories that are related to a specific product, epic, release, and so on. The definition of a backlog is flexible and it is set up by the product owner.

Procedure
1. Navigate to **All** > **Agile Development** > **Personal Backlogs**.
2. Select **New**.
3. On the form, fill in the fields.

Backlog definition form

Name	Name for the backlog.
Table	Table from which records are pulled for this backlog. The default value for this field is **Story [rm_story]**.
Visible to	Users that you want to share the backlog with. Use the Unlock Visible to icon ( ) to add users.
Visible to Groups	Groups of users that you want to share the backlog with. Use the Unlock Visible to icon ( ) to add groups.
Filter	Filter criteria that are applied to stories in the backlog. The default filter criteria is **Active is True** and **Sprint is Empty**.

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4. Select **Submit**.

What to do next

You can create any number of personal backlogs that match different priorities. Access all your personal backlogs by navigating to **Agile Development** > **Personal Backlogs** and also on the Backlog tab of your Agile Board.

Manage your product backlog in Agile Development 2.0

Manage your product backlog from a centralized location called the Agile board in Agile Development 2.0. Add stories to a personalized backlog and prioritize them as needed.

Before you begin

Role required: scrum_product_owner

About this task

Prioritize stories in your backlog. You can add stories, assign stories to a release or a product, add triaged records, and so on.

- Steps 1 and 2 take you to where you can manage your scrum backlogs.
- Steps 3 through 12 provide guidance on the different actions that you can perform on your backlog. Choose the actions based on your requirement.
- All actions that involve a triage board are accessible only when the Agile Development — Unified Backlog plugin (com.snc.sdlc.agile.multi_task) is active.

Procedure

1. Navigate to **All** > **Agile Development** > **Agile Board** > **Backlog**.

   If you have already created a personalized backlog, it automatically appears in this tab. If you have not created a personalized backlog, then a welcome page appears that provides a link to create a backlog.

2. From the list at the top-left corner, select the required backlog or create a backlog by using the Create Backlog icon ( ).

3. Update the existing filter criteria of your selected backlog by using the Edit Backlog icon ( ).

4. Personalize columns in a list by selecting the personalize icon .

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5. Add a story to the backlog.

   a. Click **Create Story**.

   b. Specify the required details in the Story form.

   c. Click **Submit**.
   The story is listed at the bottom of the backlog on the last page.

   If you want to add a story at a particular position in the backlog, select a story just above this position, and then click **Create Story**. The new story is listed below the story that you selected.

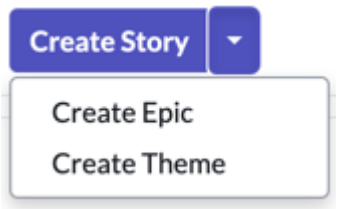
6. Update a story from the backlog.

   a. Click the story number of the story that you want to update.

   b. Edit the story details and click **Update**.
   If you have read-only access, you can open the Story form but cannot edit the story details.

7. Create an epic or a theme directly from the **Backlog** tab.

   a. Select the options icon ( ) next to the **Create Story** option.



   b. Select **Create Epic** or **Create Theme** from the list.

   c. On the form, fill in the fields and submit it.

   The new epic is listed in the epics filter only if its stories meet the filter criteria of the selected backlog.

8. Arrange stories within a Backlog page using one of the following options.
   - Use the mouse device to select and hold a story, drag it to the required position, and drop it.
   - Use the keyboard. For more information, see Arrange Agile Development 2.0 stories in Agile Board using the keyboard

   Rearranging stories in the backlog adjusts the ranking of stories in the global_rank column in the Story [rm_story] table. When you move a story within a backlog, its rank changes relative to the stories within the same backlog. So, the story at the top of the backlog list has a lower rank value and assumes higher priority while the story at the bottom of the backlog list has a higher rank value and assumes lower priority.

9. Perform any of the following actions on a single story or a set of stories by selecting the required stories and clicking the Options icon ( ).

10. Use the **Triage Board** option to view and edit the records in your triage boards.
    You can do the following actions using the **Triage Board** option:

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- View and edit the total number of records (such as problems or defects) in the triage boards of all task types
- Open the list of a specific task type
- Edit an existing triage filter definition

11. Add a triaged record, such as a defect, to the bottom of your backlog.
    a. Click **Triage Board**.
    b. Select your triage filter definition.
    For example, a definition for all defects.
    c. Select the records that you want to add to your backlog.
    d. Click **Add to Backlog**.
12. Move a triaged record from your backlog back to the triage board.
    a. Open the triaged record by clicking its number.
    b. Click the **Move back to triage board** related link.
    You need a specific role that provides access to a triaged record in the backlog. For example, to view a problem in the backlog, you must have the itil role. If you do not have access to any record, an error message appears.

Related topics

Agile board in Agile Development 2.0

Create a personalized backlog in Agile Development 2.0

Arrange Agile Development 2.0 stories in Agile Board using the keyboard

Learn how to use the keyboard to move and rearrange Agile Development 2.0 stories in the Backlog and Sprint Planning tabs of your Agile board.

Before you begin

Role required: scrum_admin, scrum_master, scrum_product_owner, or scrum_sprint_planner

Procedure

1. Reorder a single story:
    a. Highlight the desired story by pressing the Tab key.
    b. Highlight the context menu ( ) icon on the story by pressing the Tab key again.
    c. Select the story by pressing the Enter key.
    d. Move the story to the desired position using the up and down arrow keys.
    e. Fix the position of the story by pressing the Enter key.
2. Reorder multiple stories:
    a. Highlight the desired story by pressing the Tab key.
    b. Select the story by pressing the Enter key.
    c. Select multiple stories using the up and down arrow keys and the Shift or Control keys.

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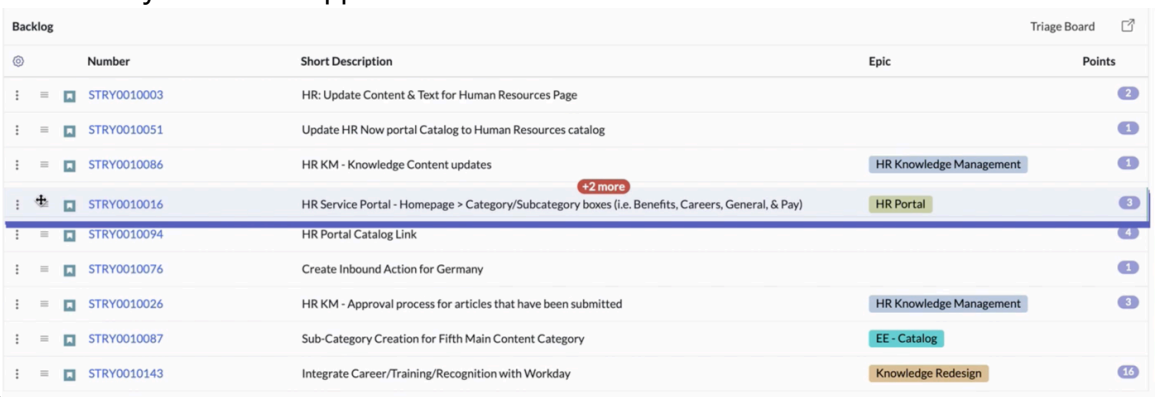
- To select consecutive stories, use the down arrow key to highlight the last story that you want to select, and then press the Shift and Enter keys.
- To select stories that are in different positions on the page, use the down arrow key till you go to the next story that you want to select. Then, press the Control and Enter keys.

  Repeat this process to select other stories.

d. Highlight the context menu ( ) icon on the story by pressing the Tab key again.

e. Press the Enter key to group all the selected stories.

Multiple stories that you selected appear grouped.



f. Move the stories to the desired position using the up and down arrow keys.

g. Fix the position of the stories by pressing the Enter key.

Plan your sprint activities in Agile Development 2.0

Streamline your sprint activities such as creating, editing, and completing sprints, or adding stories to sprints, using the Sprint Planning tab of the Agile board.

Before you begin

- You must be a member of an agile group to access the Sprint Planning tab.
- You can perform only a set of actions on the Sprint Planning tab based on the role that is assigned to you. For more information, see roles in Components installed with Agile Development 2.0.
- Role required: scrum_admin, scrum_master, or scrum_sprint_planner

About this task

- Steps 1 through 3 take you to where you can plan your sprint activities.
- Steps 4 through 11 provide various actions that you can perform to plan your sprints. Choose the ones that suit your requirement.

For more information on the Agile board, see Agile board in Agile Development 2.0.

Procedure

1. Navigate to **All** > **Agile Development** > **Agile Board**.
2. Select the Sprint Planning tab.

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3. From the **Group** field, select an assignment group for which you want to plan the sprint activities.

   The list displays all the teams to which you are added as a group member. The default assignment group is the team that you have selected earlier or the first team in which you were added as a group member.

4. Create a sprint.

   a. Select **Create Sprint**.

   b. On the form, fill in or update the fields.

   c. Select **Submit**
   Alternatively, you can also create sprints in bulk for an assignment group and come back to this planning tab to continue planning your sprints. See Create sprints in bulk in Agile Development 2.0.

5. Edit a sprint.

   a. Open the sprint form by selecting its name.

   b. In the Sprint form, update its details.
   Until the sprint begins, you can also update the capacity of the assignment group using the **Group capacity** field to account for changes in team composition, holidays, or vacations.

   c. Select **Update**.

6. Add a new story to the backlog.

   a. Select **Create Story**.

   b. On the form, fill in the fields.
   For field information, see Create a story in Agile Development 2.0.

   c. Select **Submit**.

   The story appears at the bottom of the backlog. You can edit the story details by selecting its number. If you have read-only access, you can view the story form but cannot edit the story details.

7. Add a story to the backlog or a sprint and simultaneously decide its order of implementation.

   a. From the Backlog or a sprint, select the row of a story under which you want to add the new story.

   b. Repeat steps 6a through 6c.
   The new story is placed under the story that you initially selected.

8. Personalize columns in a list using the personalize option ( ).
9. Arrange the stories according to your priority by reordering the stories in the Backlog or any of the sprint sections.
10. Start a sprint by selecting **Start Sprint** in the section of the top sprint.
    The Sprint Tracking tab appears.

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11. Mark a sprint complete by selecting **Complete Sprint** in the section of the top sprint.
    a. In the Complete Sprint dialog box, move any incomplete stories to the backlog or a future sprint.
    b. Select **Complete**.
    The sprint is marked complete and disappears from the Sprint Planning tab.

Related topics

Agile board in Agile Development 2.0

Create sprints in bulk in Agile Development 2.0

Create multiple sprints at once for one or more Agile Development 2.0 assignment groups to save time.

Before you begin

Role required: scrum_admin, scrum_master, or scrum_sprint_planner

About this task

Create multiple sprints for an assignment group at a time. If multiple assignment groups follow the same sprint cadence, you can generate sprints in bulk for all these groups together.

Procedure

1. Navigate to **All** > **Agile Development** > **Groups**.
2. Select the assignment groups that you want to create sprints for and select **Create Sprints**.
3. On the form, fill in the fields.

Create Sprints form

Field	Description
Name	Name for the sprint that applies to all the selected assignment groups. For example, if all the selected assignment groups would work for the upcoming release, you can name your sprint by the release name, such as **<Release name> sprint**.
Starting Number	Starting number of the sprint. The sprints created for the selected assignment groups are named as **<Name> <Starting Number>**.
Start date	Date that the sprint starts on.
Duration (days)	Number of days that a sprint contains.
Number of Sprints	Number of sprints that you want to create for the selected assignment groups.

4. Select **OK**

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Result
The sprints are created for the selected assignment groups and are listed in the Sprints related list of these groups.

Track progress of stories for a sprint in Agile Development 2.0

Use the Sprint Tracking tab of the Agile board in Agile Development 2.0 to track the development of the stories from your current sprint.

Before you begin
You must be a member of an assignment group to access the board.

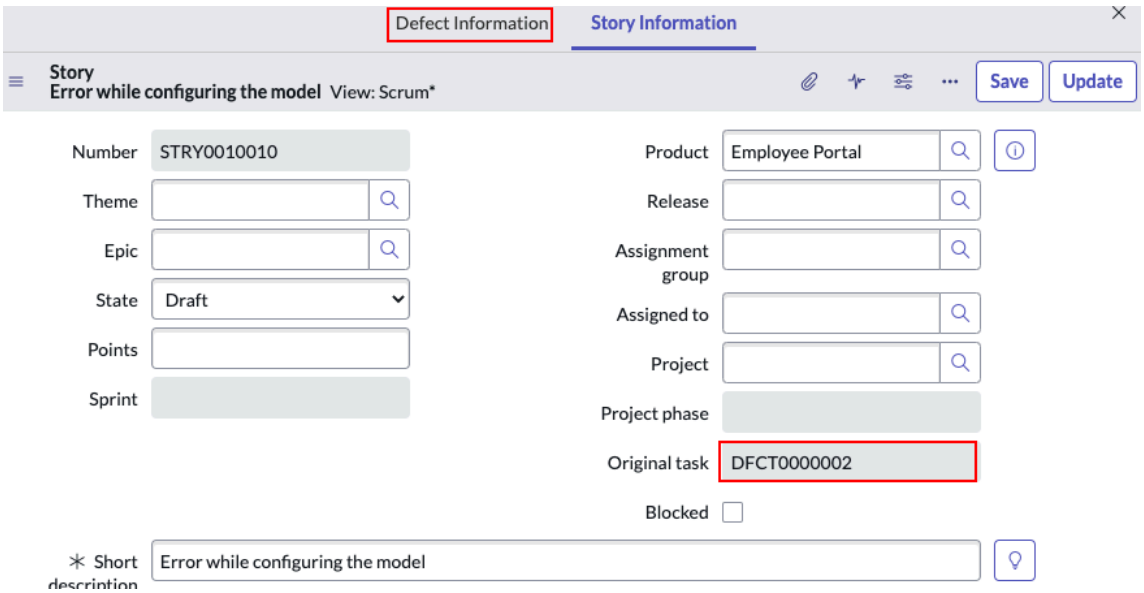
Role required: scrum_user or scrum_admin

About this task
Use the Story board view of the Sprint Tracking tab to check the state of your stories for the current sprint. On the board, stories are shown as cards, and their states are indicated as lanes.

You can move the story cards into different lanes or add new stories for the team, to make real-time updates during scrum calls or other status meetings.

Procedure
1. Navigate to **All** > **Agile Development** > **Agile Board**.
2. Select the **Sprint Tracking** tab.
3. From the **Story board** view, review the stories for the current sprint using the state lanes.
4. **Optional:** Change the state of a story by moving the story from one lane to another.

   (Optional) If you use triage board and add those records to your backlog, your board could have stories associated to the triaged records. When you move these stories to different lanes on the story board to update their state, the state of the associated story is updated but the state of the original triaged record remains the same. To change the state of the original record, open the story and switch to the original record tab.



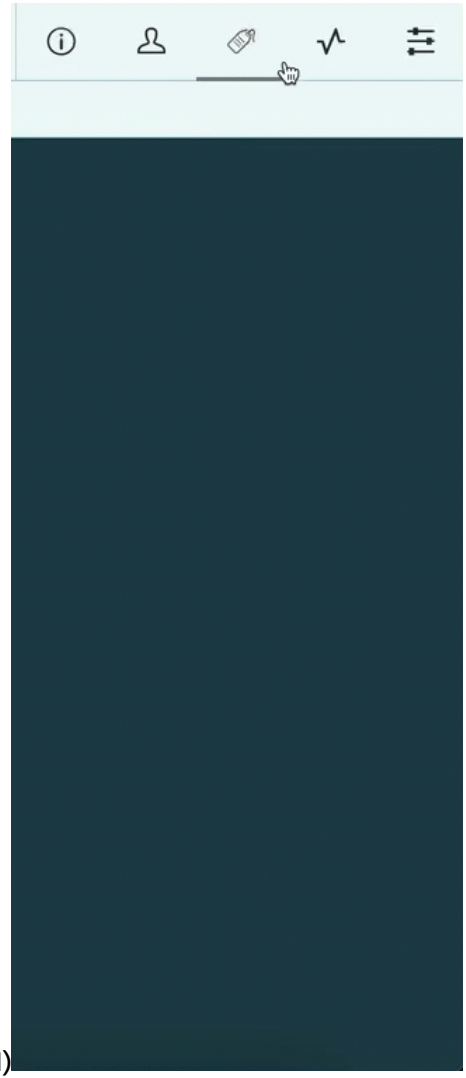
5. **Optional:** Hide lanes that you do not want to be displayed by selecting **Hide Lane** from the vertical lane menu ( ).
6. **Optional:** Display any hidden lanes and change the board theme.

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a. Select **Configuration** ( ).

b. Select **Advanced Settings**.

c. Select the lanes you want to be displayed.
You can also change the order of the lane display by reordering them in the Lane configuration section.

(Optional) 

d. Select a different color to change the board theme.

7. **Optional:** Add a story to a specific lane.

a. Select **+ Add Card**.

b. On the form, fill in the fields and click **Submit**.
For field information, see Create a story in Agile Development 2.0.

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Track progress of scrum tasks for a sprint in Agile Development 2.0

Use the Sprint Tracking tab of the Agile board in Agile Development 2.0 to track the progress of scrum tasks for the stories from your current sprint.

Before you begin

You must be a member of an agile group to access the board.

Role required: scrum_user or scrum_admin

About this task

Use the Task board view of the Sprint Tracking tab to check the state of your scrum tasks for the current sprint. On the board, each story is a collapsible section. Tasks for each story are shown as cards in these sections, with their states indicated as lanes.

You can move the task cards into different lanes or add new task for a story, to make real-time updates during scrum calls or other status meetings.

Procedure

1. Navigate to **All** > **Agile Development** > **Agile Board**.
2. Click the **Sprint Tracking** tab.
3. From the **Task board** view, review the states of the scrum tasks of all stories scheduled for the current sprint.
4. Change the state of a scrum task by moving the task from one lane to another.
5. Add a scrum task to a specific lane.

   a. Click **+ Add Card**.

   b. On the form, fill in the fields and click **Submit**.
   For field information, see Create a scrum task for Agile Development 2.0 stories.

Track sprint progress in Agile Development 2.0

Track the progress of stories, scrum tasks, and tests for the current sprint from a single consolidated view on the Agile board in Agile Development 2.0.

Before you begin

- You must be a member of an Agile 2.0 assignment group to access the Sprint Tracking board.
- Viewing, adding, or updating tests for stories requires activating the Test Management 2.0 plugin (com.snc.test_management.2.0).

Role required: scrum_user or scrum_admin.

About this task

Using the List view of the Sprint Tracking tab, review the progress of scrum tasks and tests created for the stories of the current sprint.

Each story is listed as section that can be expanded to show the tasks or tests created for it. You can add new tasks or tests to the stories, or run tests that are in the Ready state.

Steps 3 through 8 provide different actions to perform on the Sprint Tracking board. Choose the ones that suit your requirement.

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Procedure

1. Navigate to **All** > **Agile Development** > **Agile Board**.
2. From the Sprint Tracking tab, select the **List** view.

   All stories scheduled for the current sprint are listed as sections, which can be expanded and collapsed. The details of the story such as the current state, short description, and assigner user can be seen.
3. From the **Show** field, select the items that you want to review the status of.
   - Scrum Tasks
   - Tests
4. Expand each story section to see the details of the tasks or tests added to it.

   You can customize the information shown for these items using the personalize option ( ).
5. Add a new scrum task to a story.

   a. In step 3, select **Scrum Tasks**.

   b. From the section of the story that you want to add the task for, select **Add Scrum Task**.

   c. On the form, fill in the fields.
   For field information, see Create a scrum task for Agile Development 2.0 stories.

   d. Select **Submit**.
6. Add a new test for a story.

   a. In step 3, select **Tests**.

   b. From the story that you want to add the test for, select **Add Test**.

   c. Enter the short description and select **Submit**.
   A test is created and listed in the story section. You can open the test form, add test steps, verify them and mark the test as ready to run. For information on the test form, see Test version form in Agile Development 2.0.

   Note:
   Adding tests to a Story requires activating the Test Management 2.0 plugin. See Activate Test Management 2.0.
7. If there are tests in Ready state for a story, you can run those tests.
   For more information, see Run tests for a story in Agile Development 2.0.

Run tests for a story in Agile Development 2.0

For a story whose tests are marked ready to be run, run those tests and execute all the test steps using the Sprint Tracking tab of the Agile board in Agile Development 2.0.

Before you begin

Role required: scrum_user

About this task

From the Agile board, use the List view of the Sprint Tracking tab to check stories that have test versions ready to be run. These stories have a **Run** option next to their state. Run those tests by executing and verifying each test step.

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Procedure

1. Navigate to **All** > **Agile Development** > **Agile Board**.
2. From the Sprint Tracking tab, select the **List**view.

   All stories scheduled for the current sprint are listed as sections, which can be expanded and collapsed.
3. From the **Show** field, select **Tests**
4. For the story that you want to run the tests on, select **Run**.
5. Select the environment on which the test is to be run and confirm by selecting **Run**.
6. In the Test Execution window, execute each test step and mark them as passed, failed, or blocked accordingly.
   - Passed ( )
   - Failed ( )
   - Blocked ( )

   If you select Failed or Blocked for a test step, you can enter comments and attach files to support your selection.
7. If you're running multiple tests for the story, use the Next Test option ( ) to move to the next test after verifying the current one.
8. Repeat step 6 and 7 until you've executed and verified all the test steps.
9. **Optional:** You can pause the test for the moment by selecting **Pause**

   (Optional) If you've paused the test, skip step 10.

   When you want to resume the paused test run later, you can find it at **Test Management** > **Runs**.
10. After marking all test steps, select **Done**.

Result

The result of each test is indicated on the Agile board as Passed, Failed, Blocked, or Not finished according to the following conditions.

- If all the test steps are passed, the status is **Passed**.
- If at least one step of the test is not executed, the status of the test is **Not finished**.
- If at least one step of the test fails, the overall status of the test is **Failed**. This rule takes precedence over the previous rule.
- If at least one step of the test is blocked, the overall status of the test is **Blocked**. This rule takes precedence over the previous two rules.

What to do next

View the test results for a story in Agile Development 2.0

View the test results for a story in Agile Development 2.0

Analyze results of the tests that you run on Agile Development 2.0 stories. Troubleshoot failures so that the story can be moved to completion.

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Before you begin
Role required: scrum_user

About this task
Use the Sprint Tracking tab of the Agile board to review the tests run for a story. The results of the run tests are listed in the Test results related list of each test form. From these results, you can find additional details such as the comments for why a test has been blocked or failed, and any attachments supporting the comments. Use these additional details to troubleshoot and fix any issues in your product or feature.

Procedure
1. Navigate to **All** > **Agile Development** > **Agile Board**.
2. From the Sprint Tracking tab, select the **List** view.

   All stories scheduled for the current sprint are listed as sections, which can be expanded and collapsed.
3. From the **Show** field, select **Tests**
4. From a story section, select a test that you want to analyze the results of.
5. From the Test results related list, select a test result to view its details in a form.

Test results form

Field	Description
Number	Automatically generated number for the test result.
Test	Test that is run.
Result	Execution status of the test: **Passed**,**Failed**, or **Blocked**.
Version	Version of the test that is executed.
Execution environment	Environment on which the test is executed.
Updated	Date and time that the test result was recorded.
Run by	Name of the tester who executed the test plan.
Test run	Name of the test run.

Beneath these fields, the tests steps that are executed and verified for this test are listed along with their execution status. Any comments or attachments that are added to these steps are also displayed for reference.

Related topics
Track sprint progress in Agile Development 2.0

Report a defect in Agile Development 2.0
Track issues associated to your product or feature by reporting defects in Agile Development 2.0.

Before you begin
Role required: feature_user, scrum_story_creator, or scrum_admin

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The administrator must grant the feature_user role to all those users who are expected to report defects using the Agile Development 2.0 application.

About this task

Create a defect record using the Defects module. You can later create a story for this defect so that the relevant assignment group can work on resolving the issues.

Procedure

1. Navigate to **All** > **Agile Development** > **Defects**.
2. Select **New**.
3. On the form, fill in the fields.

Defect form fields

Field	Description
Number	System-generated unique identifier for the defect.
Priority	Priority assigned to the defect. A product owner can use priorities when creating stories.
State	State of the defect. Select one of the following: ○ **Draft**:The defect details are still being drafted. ○ **Scoping**: The defect is being triaged and the scope of the defect and its fix is being analyzed. ○ **Awaiting approval**: The scope of the defect is finalized and the team is awaiting approval to start working on it. ○ **Work in progress**: The team is working on the fix for the defect. ○ **Testing/QA**: The tester is testing the defect fix based on the scope provided. ○ **Deploy/Launch**: The team is ready to launch the fix for the defect. ○ **Closed Complete**: The fix for the defect is deployed into the product. ○ **On Hold**: The defect is put on hold due to any blockers and until further review. ○ **Cancelled**: The team cancels working on this defect. This field is automatically set to **Draft**.
Assignment group	The group to which the defect belongs.
Assigned to	The user assigned to the defect.
Product	Product with which this defect is associated. The field is required if the defect is part of a product.
Reported against	Problem, change, or other task record that this defect is reported against.
Short Description	Brief description of the defect.
Description	Detailed description of the defect.

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Field	Description
Work notes	Notes about the work being performed on the defect. Work notes can be updated as the work progresses on this defect.

4. Select **Submit**.

Result
The defect is created and the form reopens with the Stories related list. The list of stories is only visible to users with a scrum role.

What to do next
A scrum product owner can review the defect and decide if a story must be created for it. See Create a story in Agile Development 2.0.

Create an enhancement request in Agile Development 2.0

Capture enhancement ideas for your feature or product as enhancement requests in Agile Development 2.0 so that you can review and prioritize them later.

Before you begin
Role required: Any one of the feature_user, scrum_story_creator, scrum_admin, or rm_enhancement_admin roles

The administrator must grant the feature_user role to all users who are expected to create an enhancement request in the Agile Development application.

About this task
Create an enhancement record using the Enhancements module. You can later review this record and create a development story for it if you choose to prioritize for any of your upcoming releases.

Procedure
1. Navigate to **All** > **Agile Development** > **Enhancements**.
2. Click **New**.
3. Fill in the fields, as appropriate.

Enhancement form

Field	Description
Number	System-generated number for the enhancement.
Priority	Priority assigned to the enhancement. Product owners can refer to this value when creating stories and scoping it into upcoming releases.
State	Current state of the enhancement. The default is **Draft**.
Assignment group	Group that would work on this enhancement
Assigned to	User assigned to the enhancement.
Product	Product with which this enhancement is associated. The field is required if the enhancement is part of a product.

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Field	Description
Short Description	Brief description of the enhancement.
Description	Detailed description of the enhancement.
Work notes	Notes about the work being performed on the enhancement.

4. Click **Submit**.

Result
The enhancement request is created and the form reloads with the Stories related list. The list of stories is only visible to users with a scrum role.

What to do next
A scrum product owner can review the request and decide whether to create stories for it.

Set up a triage board in Agile Development 2.0

Set up your own triage board to view and manage records that are important to your product, such as problems, incident tasks, defects, or change requests at one place easily.

Before you begin

- Activate Agile Development — Unified Backlog.
- Ensure that you own a backlog. See Create a personalized backlog in Agile Development 2.0.

Role required: scrum_product_owner

About this task
Define filters to create a triage board, so that you can access and manage the records that you want easily.

You can create as many triage boards as you want. For example, you can create one triage board for defects and incidents and another for enhancements.

Procedure

1. Navigate to **All** > **Agile Development** > **Agile Board** > **Backlog**.
2. Set up a new triage board.
   - If this is your first triage board, select **Triage Board** > **Set up Triage Board**.
   - If you already have a triage board, select **Triage Board** > **New Triage Definition**
3. On the form, fill in these fields.

Field	Description
Name	Name for the triage board.
Table	Table from which you want to filter records for the triage board.
Filter	Filter criteria to be applied on the selected table to populate the triage board.

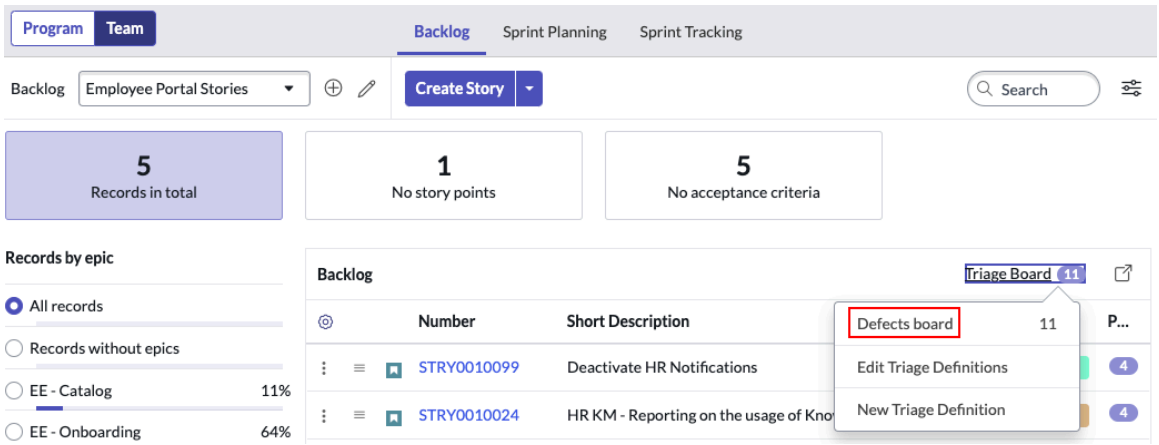
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Field	Description
	Important: Do not to remove the default conditions: **Active is true** and **Agile story is empty**. ○ **Active is true** ensures that your triage board only shows the tasks that are active and not completed or cancelled. ○ **Agile story is empty** ensures that the task doesn't already have a story associated to it and is not already present in some other backlog.
Backlog definition	Backlog that any stories created from this triage board would be added to.

4. Select **Submit**.

Result

A triage board is created and can be accessed from the Backlog section of the Agile board.



What to do next

- Edit the filter criteria for existing triage boards.

  Select **Triage Board** and then select **Edit Triage Definitions**.

- Open the new triage board to view its contents.

  Select **Triage Board** and then select the board that you created.

- Triage items and add them to a backlog in Agile Development 2.0

Related topics

Manage your product backlog in Agile Development 2.0

Triage items and add them to a backlog in Agile Development 2.0

Review the list of items in your triage board and add them to your Agile Development 2.0 backlog. Based on their priority, you can schedule them in the upcoming sprints for your product teams to work on them.

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Before you begin

- Activate Agile Development — Unified Backlog
- Set up a triage board in Agile Development 2.0

Role required: scrum_product_owner

About this task

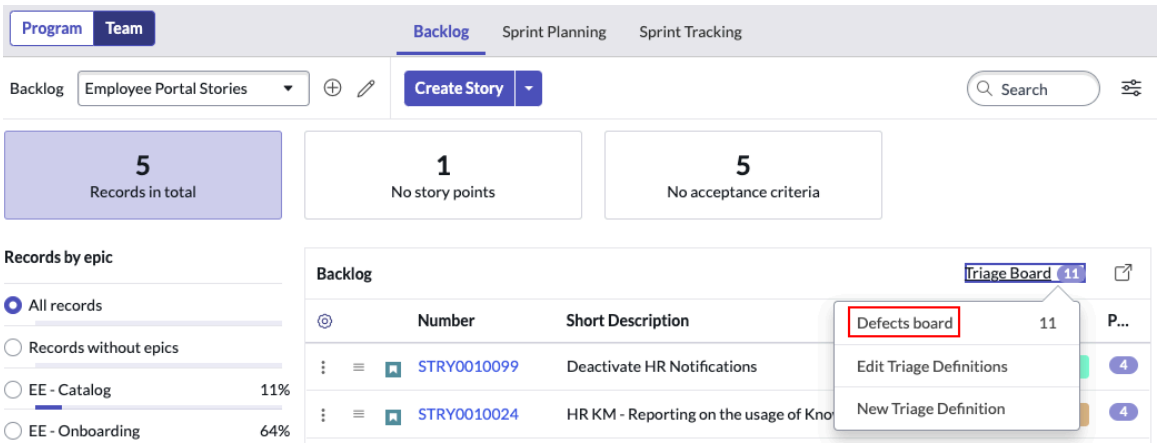
Select the items from your triage board and add them to your backlog based on their priority for your product. Every item that is added to the backlog from the triage board has an associated story to it. From the Agile board, you can switch between the original item Information and Story Information tabs for more details.

These stories can be later assigned to product teams and scheduled into sprints.

Procedure

1. Navigate to **All** > **Agile Development** > **Agile Board**.
2. From the Backlog section of the Agile board, select your product or team backlog from the **Backlog** field.
3. Select **Triage Board** and select the triage board that you want to review the items of.

   For example, in the screenshot here, Defects board can be selected.



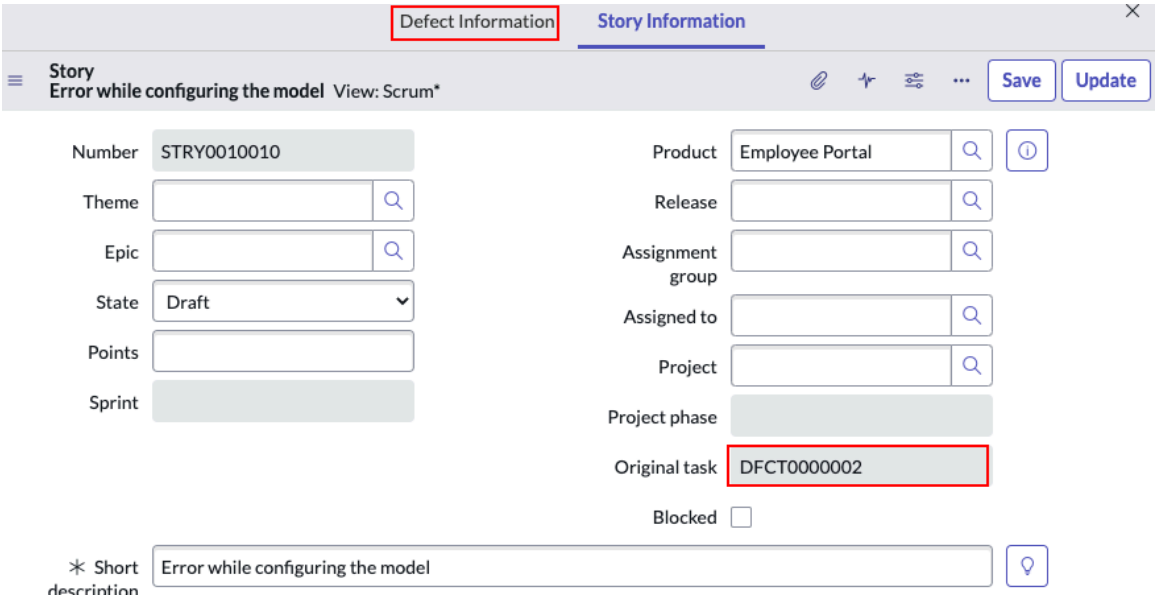
4. Review the list and select the ones that you want to add to the backlog.
5. Select **Add to Backlog**.

Result

The selected list of items from the triage board is added to the backlog as stories. You can schedule these stories into upcoming sprints using the Sprint Planning tab of the Agile board.

An example here shows how an associated story is created for a defect that is added to the backlog. The story has a reference to this defect in the **Original task** field.

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Scrum Programs for Agile Development 2.0

Plan and track the work of multiple teams that work together, either toward a common short-term outcome or on an ongoing basis.

This video provides an overview of Scrum Programs for Agile Development 2.0.

The examples of short-term outcomes are a demand, project, epic, or a release. Teams that work together on a scrum program can:

- Work in synchronized or varied sprint cadences.
- Contribute to work outside of this common scrum program.

With the centralized Planning page for a scrum program on ServiceNow® Agile Development 2.0, you can:

- Assign work and compare the workload of multiple teams across sprints.
- Set, view, and adjust dependencies between stories across multiple teams.

Activate Scrum Programs

Activate the Scrum Programs (com.snc.sdlc.scrum_program) plugin to start planning your scrum programs in Agile Development 2.0.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

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Note:
When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Components installed with Scrum Programs

Understand the roles, tables, business rules, and UI macros that are installed when you activate the Scrum Programs plugin.

Note:
The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Roles installed with Scrum Programs

Role title [name]	Description	Contains roles
Program manager [it_program_manager]	Users with this role have full control on all the scrum programs.	• program_manager • scrum_product_owner • scrum_master

Note:
The it_program_manager role is installed with the activation of Scrum Programs only if it is not already installed through the Project Portfolio Management plugin.

Tables installed with Scrum Programs

Table	Description
epic_backlog_definition	Stores the filter criteria that is used to create the epic backlogs.
scrum_program_m2m_group	Stores the relationship between a scrum program and its teams.

Business rules installed with Scrum Programs

Name	Table	Description
Set global rank for epic	rank_configuration	Contains fix script to populate global rank for existing epics.

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UI macros installed with Scrum Programs

Name	Description
program_planning_constants	Contains customizable TEAM_LIMIT and STORY_LIMIT properties. These properties limit the number of teams and stories that can be shown on the scrum program planning board.

The default value for the TEAM_LIMIT property is 15 and STORY_LIMIT property is 1000. You can change these values according to your preferences.

Note:
Increasing the values might result in longer loading times and degraded performance of the scrum program planning board.

Create an epic backlog

Categorize epics into epic backlogs by defining a set of filters according to your preferences. While planning your scrum program, you can use these epic backlogs to plan for only those stories that belong to the epics in this backlog.

Before you begin

Role required: it_program_manager

About this task

With epic backlogs, you can filter stories on the planning board, to display the stories from only certain epics. For example, you can create a backlog of epics with Priority set as High. Later on the planning board, you can focus only on the stories belonging to these high-priority epics and plan your sprints accordingly.

Procedure

1. Navigate to the Epic Backlog form in one of the following ways:

Option	Action
From the Epic Backlogs module	a. Navigate to **Agile Development** > **Epic Backlogs**. b. Click **New**.
From Agile Board	Navigate to **Agile Development** > **Agile Board** > **Program** > **Backlog** and do one of the following: ○ If you are creating an epic backlog for the first time, click **Create Backlog**. ○ If this backlog that you want to create is an addition to existing epic backlogs, click the create icon (⊕).

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2. In the **Name** field, enter a name of your choice for the epic backlog.
3. To set the desired filter conditions, click **Add Filter Condition** or **Add "OR" Clause**.

   For example, you can choose to filter your epics by the priority set for them.

   Note:
   The default filter condition is **Task type is Epic** and **Active is true**.

4. Click **Submit**.

Related topics

Manage your epic backlogs

Manage your epic backlogs

Create, update, and rearrange your epics by using a centralized view of epic backlogs on Agile Board.

Before you begin

Role required: it_program_manager, scrum_user

Procedure

1. Navigate to **All** > **Agile Development** > **Agile Board**.
2. From the **Program** tab, select **Backlog**.
   - If an epic backlog exists, the page populates a list of epics that match the criteria of this backlog.
   - If you have no existing epic backlogs, see Create an epic backlog.
3. To switch between the available epic backlogs, select a backlog from the Backlog list.
4. To edit the selected backlog, click the edit icon ( ).

   Note:
   You must have the role of it_program_manager to perform this step.

5. To add a new epic to the selected backlog, click **Create Epic**.
6. To filter the list of epics by product, select a product category from **Epics by product**.

   You can show or hide the **Epics by product** filter. Click the configuration icon ( ) and toggle **Show Products Filter** on or off.
7. To locate an epic from the backlog, using the short description or the epic number, use the search bar.
8. To edit the details of an epic, click the epic number.
9. To rearrange the epics based on their priority, do one of the following:

Action	Description
Use the mouse device to rearrange the epics	**a.** Select the required epics. **b.** Drag the selection to the desired position and drop it.

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Action	Description
Use the keyboard to rearrange a single epic	**a.** To highlight the context menu icon (☰) of the desired epic, press the **Tab** key and press the **Enter** key. **b.** Move the epic to the desired position by using the up and down arrow keys. **c.** To fix the position of the epic, press the **Enter** key.
Use the keyboard to rearrange a group of epics	**a.** To highlight an epic, press the **Tab** key. **b.** To select the epic, press the Enter key. **c.** Navigate using the up and down arrow keys and do the following: **i.** To select consecutive epics, press the **Shift** and **Enter** keys together. **ii.** To select random epics, press the **Ctrl** (for Windows) or **Command** (for Mac) key and the **Enter** key together. **d.** To highlight the context menu icon (☰) of an epic, press the **Tab** key and press the **Enter** key. **e.** Move the epics to the desired position by using the up and down arrow keys. **f.** To fix the position of the epics, press the **Enter** key.

You can also perform the following actions on a single epic or a group of epics:

a. Select the required epics.

b. Click the more options icon (•••) of an epic and select any of the following options:

Option	Action
Move to top	Moves epics to the top of the Backlog list.
Move to bottom	Moves epics to the bottom of the Backlog list.
Product	Opens the Products list. Select the product to which the epics belong.

10. To view the backlog in a standard platform list, click the standard list view icon (⧉).

Create a scrum program

Create a scrum program to plan sprints and track the progress of the multiple scrum teams that are working together.

Before you begin

Ensure that you have the information of the teams to be included in the program.

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Role required: it_program_manager

Procedure

1. Navigate to the Program form using one of the following ways:

Option	Action
From the Scrum Programs module	**a.** Navigate to **Agile Development** > **Scrum Programs**. **b.** Click **New**.
From Agile Board	**a.** Navigate to **Agile Development** > **Agile Board**. **b.** From the **Program** tab, select **Planning**. **c.** Click **Create Program**. **Note:** You can create a scrum program from the **Planning** page of Agile Board but only if it is your first scrum program.

2. On the form, fill in the fields.

Program form

Field	Description
Planned start date	Start date of the program. Manually enter the date or pick from the calendar. The default date is the current day.
Planned end date	End date of the program. Manually enter the date or pick from the calendar.
Planned duration	Duration of the program in days and hours. This field auto-populates based on the start and end dates. The default duration of a scrum program is one day.
Program manager	Manager of the program.
Default Epic Backlog	Initial epic backlog that is applied to the planning page, when you select this scrum program.

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Field	Description
	Currently on the planning page, the epic backlog is not automatically applied for a program. So, it is recommended that you manually select the required backlog while planning.
Program Name	Brief description of the program.

3. Click **Submit**.
   Any user with the role scrum_user can view the created scrum programs.

What to do next

- Assign teams to a scrum program.
- Click the **Scrum Program Board** related link to plan your scrum program.

Assign teams to a scrum program

Add teams to your scrum program to assign work and track the progress of the work.

Before you begin

Ensure that the teams that work on this scrum program are created as agile groups. For the procedure to create an agile group and assign members to it, see Create an agile group in Agile Development 2.0.

Role required: it_program_manager

Procedure

1. Navigate to **All** > **Agile Development** > **Scrum Programs**.
2. Open your scrum program record.
3. In the Teams related list, click **Edit**.
4. Move the desired teams from **Collection** to **Teams List**.
5. Click **Save**.

   You can add a team to multiple scrum programs by following the same procedure. The teams that you add to a scrum program are displayed in its Teams related list.

What to do next

Plan a scrum program.

Scrum program planning board

Use a centralized view on Agile Board to plan work for the teams that are working on your scrum program.

Quick view of the scrum program planning board UI components.

Agile Board has a program planning board where you can plan, schedule, and review work for your scrum teams. The planning page contains the following components that guide you during your planning process.

Program selector

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Select a program that you want to plan or review. After you select a program, you can add teams or update other information by clicking the edit icon ( ).

Program timeline

Navigate the program timeline by scrolling horizontally or by using the forward ( ) and back ( ) icons.

Epic Backlog filter

Select an epic backlog that is associated with your scrum program. You can filter the stories on the program planning board and the epic backlog pane. By analyzing the workload for just these selected epics, you can understand how the workload is scheduled across sprints.

Configuration panel

Turn on or off the following components on the planning board by using the configuration panel icon ( ).

Team backlog

Enables you to show or hide the team's backlog lane.

Story dependencies

Enables you to visually analyze dependencies between the stories of different sprints and teams by using the story dependency lines. You can use the dependencies option to show or hide these dependency lines. If you choose to hide the dependencies or if the dependencies involve a story that's not on the board, then you can see a colored border on the story card.

The color of the dependency indicates the way you've scheduled the stories.

- Green: The prerequisite story is scheduled in a sprint first. Then, the dependent story is scheduled in a later sprint.
- Red: The dependent story is scheduled in a sprint first. Then, the prerequisite story is scheduled in a later sprint. Review the dependency and reschedule the story as required.

If none of the stories have a prerequisite or dependent story that is associated with them, the dependencies option is not visible.

For information on how to add story dependencies, see Add dependencies for Agile Development 2.0 stories.

Epic Backlog pane

Enables you to see a list of all the epics that are based on the filter criteria in the epic backlog definition. For more information, see Create an epic backlog.

In the backlog pane, you can do the following actions for an epic:

- View the epic description.
- View the unassigned and unscheduled stories of the epic as cards with their short descriptions and story points.
- Edit the epic's information by clicking its name.
- Add a new story to the epic by clicking **Create Story**.

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Scrum teams

View all the teams that are involved in the selected scrum program toward the left of the planning board.

You can update a team's information, such as the team members, group capacity, or description, by clicking the team's name.

If your teams do not have sprints added to them, or if you want to add more sprints, you can Add sprints from the program planning board directly.

Team backlog lane

Enables you to see the stories that are assigned to the team but these stories aren't scheduled yet into any sprint.

While planning your scrum program, if you know which stories must be assigned to the team but you don't know what sprints to use, you can move these stories to the team's backlog lane. By doing so, you can have a clear idea of the team's workload for the upcoming sprints and then eventually add these stories to the correct sprints.

You can also unplan a story that has already been scheduled to a sprint by dragging the story card back to the team's backlog. Use the backlog lane on the planning board to see which team has the story. Then, decide which sprint to schedule it in.

If you want to unassign a story from a team, you can drag the story card and drop it back into the epic backlog lane.

Team sprint lanes

Enable you to see the sprint cadences of the teams.

Pointing your cursor to a sprint's name shows you its details such as the duration, total story points, and filled capacity. You can edit details, such as group capacity and planned start and end dates, by clicking the sprint name.

While planning your scrum program, if you know the sprint in which the story would be worked on, you can move the story card to that sprint.

Story cards

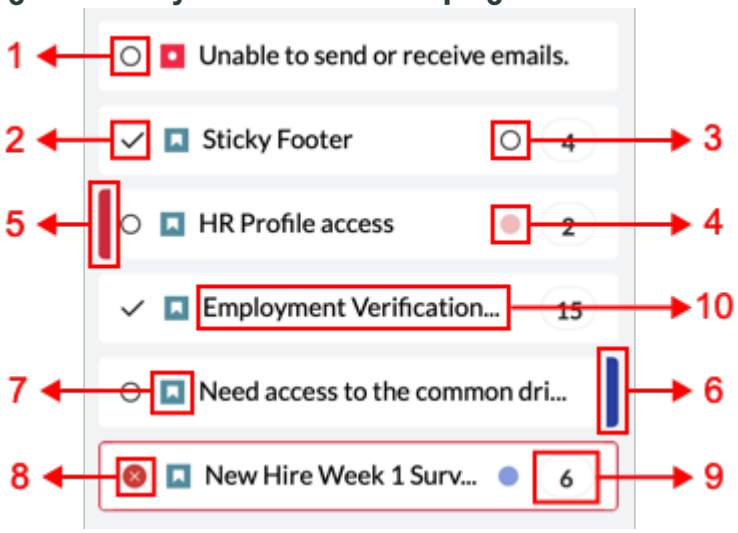
Enable you to see the stories of the epics from your scrum program in the form of cards. You can move these cards around to assign them to teams and to plan them into sprints.

If you have activated the Agile Development — Unified Backlog plugin (com.snc.sdlc.agile.multi_task), you can also see stories that were added from the triage board to your unified backlog. From the planning board, you can double-click a story card to open it in a pop-up window and edit its details. If the story is created from a record on the triage board, such as a defect, you can see both the story information and the defect information side-by-side.

The story cards use the following indicators:

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Legend for story cards on the scrum program board



Indicators for story cards on the scrum program board

Number	Indicator description
1	Indicator for a story that is not complete.
2	Indicator for a story that is complete.
3	Indicator for a story that belongs to an epic, which does not have any color attributed to it. Point your cursor to the dot to view the epic's name.
4	Indicator for a story that belongs to an epic, which has a color attributed to it. Point your cursor to the dot to view the epic's name.
5	Indicator of an associated prerequisite story. If this band appears in red, it indicates that the dependency is not set correctly and needs to be reviewed.
6	Indicator of an associated dependent story. If this band appears in red, it indicates that the dependency is not set correctly and needs to be reviewed.
7	Indicator for a story that is a regular story. This icon changes with the type of the record. For example your team could have stories that are created from problems, enhancements, defects, and other records.
8	Indicator for a story that is blocked.
9	Story points.
10	Short description of the story.

Note:
Stories can be created from enhancements, defects, incidents, or other such records only if you have activated the Agile Development — Unified Backlog plugin (com.snc.sdlc.agile.multi_task).

Sprint workload capacity bar

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Plan a sprint efficiently. The bar, which is under a sprint name, indicates the workload that is planned for the team versus the team's capacity for that sprint. Pointing your cursor to the sprint name gives you additional details.

Zoom in and zoom out

Adjust the board view using the zoom in icon ( ) and the zoom out icon ( ).

Search

Filter the stories on the planning board using a search term. For example, you can enter a story number or a phrase from a short description.

Stories list

View a list of all stories of the program using the standard list view icon ( ).

Plan a scrum program

Plan work for sprints, using a centralized view on Agile Board, of multiple scrum teams that are working together on a scrum program.

Before you begin

- Create an epic backlog.
- Create a scrum program.
- Role required: scrum_sprint_planner

Procedure

1. Navigate to **All** > **Agile Development** > **Agile Board**.
2. From the **Program** tab, select **Planning**.
3. From the Program list, select a scrum program that you want to plan.

   A planning board displays all the teams that are working on the selected program, their sprint cadences, and sprint capacities.

4. From the Backlog list, select an epic backlog and click the backlog icon ( ) to display the epics from the selected backlog.
5. View the stories of an epic by selecting the epic from the backlog.
6. Assign a story to a scrum team by dragging a story card from the backlog and dropping it either in a sprint or team's backlog lane.

   You can reschedule the stories across teams and sprints by rearranging the story cards.

   - If you move the story card to a team's backlog, the **Assignment group** field is updated accordingly.
   - If you plan the story card into a sprint, the **Assignment group** and the **Sprint** fields of the story are updated accordingly.

     The sprint capacity bar below the sprint name fills up depending on the stories that are scheduled for it.

7. **Optional:** Update the group capacity of a team's sprint by clicking the sprint name.
8. **Optional:** Unplan a story by dragging it from the planning board and dropping it either in the epic backlog pane or the team's backlog lane.

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- Dropping the story back into the epic backlog pane clears the references of the sprint and assignment group from the story.
- Moving the story to the team's backlog lane clears only the sprint reference but retains the assignment group.

Related topics

Scrum program planning board

Add sprints from the program planning board

Add sprints to your scrum teams directly from the scrum program planning board without having to navigate to another module.

Before you begin
Role required: scrum_sprint_planner

Procedure

1. Navigate to **All** > **Agile Development** > **Agile Board**.
2. From the **Program** tab, select **Planning**.
3. From the Program list, select a scrum program that you want to plan.
4. Under the team name, click **Add sprints**.
5. On the form, fill in the fields.

Create Sprints form

Field	Description
Name	Name of the sprint for the team.
Starting Number	Number that you want the sprints to start with. For example, if it's your team's first sprint, enter **1**.
Start date	Start date of the team's sprint.
Duration (days)	Sprint duration of the team.
Number of Sprints	Number of sprints that you want to add to the team. For example, if you want to add four sprints to the team, enter **4**.

6. Click **OK**.

You can see new sprints for the team on the program planning board.

Work Progress Status for Agile Teams

The Work Progress Status for Agile Teams application provides you with indicators such as estimated completion date and progress status (green, yellow, red) for all your Agile Development 2.0 epics.

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As a product owner or a team lead, these indicators help you understand if your Agile team could complete the epics' work by the planned end dates so that you can adjust your plans accordingly. As a team member working on stories of an epic, these status indicators help you understand your contribution to the overall work and your progress so that you can review your work strategy if necessary.

Note:
You must enter a value for the **Planned end date** field for an Agile Development 2.0 epic for these work progress status indicators to populate.

Install Work Progress Status for Agile Teams

Install the Work Progress Status for Agile Teams (sn_scrum_progress) application from ServiceNow Store.

Before you begin

- Activate the Agile Development 2.0 (com.snc.sdlc.agile.2.0) plugin.
- Install Performance Analytics Content Pack for Agile 2.0.

To verify that plugins and applications are activated and installed, navigate to **Subscription Management** > **Subscriptions** in your instance. The list displays the subscriptions your organization has purchased. Activation of Agile Development 2.0 and Performance Analytics Content Pack for Agile 2.0 on production instances may require separate licenses. Contact ServiceNow Support for details.

Role required: admin

Procedure

1. Navigate to ServiceNow® Store.
2. Search for Work Progress Status for Agile Teams.
3. Click the application tile.
   You can view detailed information about the application you are installing.

   Note:
   Consider reading the Other Requirements and Dependencies sections, as applicable.

4. Click **Get** and enter your Now Support login credentials.
5. Click **Request Install**.
6. In the **Instance Name** field, enter your details and click **Validate Instance**.
7. In the **Reason for the Instance** field, enter your details and click **Request**.
   You receive an email with detailed installation instructions.
8. Log in to the instance you want to install Work Progress Status for Agile Teams on.
9. Navigate to **System Applications** > **Applications**.
10. Locate the Epic Progress Status for Agile 2.0 application, select it, and click **Install**.

What to do next

If you haven't already, start the [Scrum] Daily Data Collection job. For more information, see Enable daily data collection for Agile 2.0 dashboards.

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Reviewing progress status for Agile Development 2.0 epics

Understand if your work would be completed by the planned end dates by reviewing progress status of your Agile Development 2.0 epics.

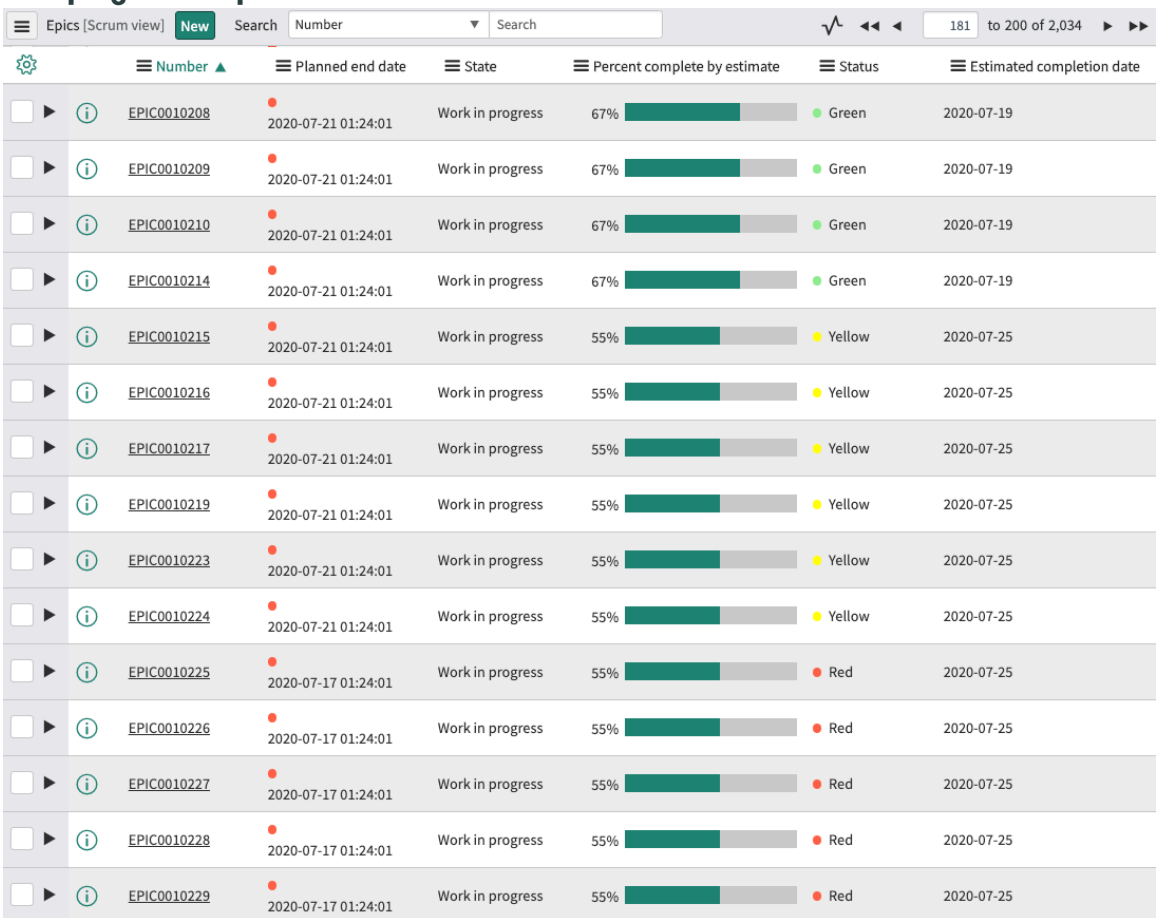
Navigate to **Agile Development 2.0** > **Epics** and filter the epics for your team.

The Status column of the epics list shows a Green, Yellow, or Red indicator for each epic to indicate the following:

- Green: Your epic is on track to be complete by the planned end date.
- Yellow: Your epic is off track and your plan of execution must be reviewed.
- Red: Your epic is not progressing well and might be at risk of not being complete by the planned end date,

The estimated completion date displays a date with the likelihood of the epic's completion.

Wok progress of Epics



Number ▲	Planned end date	State	Percent complete by estimate	Status	Estimated completion date
EPIC0010208	2020-07-21 01:24:01	Work in progress	67%	Green	2020-07-19
EPIC0010209	2020-07-21 01:24:01	Work in progress	67%	Green	2020-07-19
EPIC0010210	2020-07-21 01:24:01	Work in progress	67%	Green	2020-07-19
EPIC0010214	2020-07-21 01:24:01	Work in progress	67%	Green	2020-07-19
EPIC0010215	2020-07-21 01:24:01	Work in progress	55%	Yellow	2020-07-25
EPIC0010216	2020-07-21 01:24:01	Work in progress	55%	Yellow	2020-07-25
EPIC0010217	2020-07-21 01:24:01	Work in progress	55%	Yellow	2020-07-25
EPIC0010219	2020-07-21 01:24:01	Work in progress	55%	Yellow	2020-07-25
EPIC0010223	2020-07-21 01:24:01	Work in progress	55%	Yellow	2020-07-25
EPIC0010224	2020-07-21 01:24:01	Work in progress	55%	Yellow	2020-07-25
EPIC0010225	2020-07-17 01:24:01	Work in progress	55%	Red	2020-07-25
EPIC0010226	2020-07-17 01:24:01	Work in progress	55%	Red	2020-07-25
EPIC0010227	2020-07-17 01:24:01	Work in progress	55%	Red	2020-07-25
EPIC0010228	2020-07-17 01:24:01	Work in progress	55%	Red	2020-07-25
EPIC0010229	2020-07-17 01:24:01	Work in progress	55%	Red	2020-07-25

The [Scrum] daily data collection job helps generate the burnup report for your epics. Using the data generated for these epic burnup reports, an estimated completion date is determined for each of your epics. You can see that this date is the intersection of Completed and Scope forecast series in the respective epic burnup reports.

Based on this estimated completion date, the progress status for your epics is determined. Progress status for an epic is calculated only under the following conditions:

- Planned end date is populated in the epic.
- Percentage completion of the epic is a value greater than 0.

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The color of the progress status indicator is determined using the following conditions:

- Green: Estimated completion date is on or before the planned end date.
- Yellow: Estimated completion date is beyond the planned end date by a deviation of 1% to 14%.
- Red: Estimated completion date is beyond the planned end date by a deviation of 15% or more.

Related topics

Agile 2.0 Epic Dashboard

Performance Analytics Content Pack for Agile 2.0

Improve your Agile processes and practices using preconfigured dashboards with data visualizations from the Platform Analytics Content Pack for Agile 2.0.

Enabling the Performance Analytics Solution

Use the Performance Analytics widgets on the dashboard to visualize data over time, analyze your business processes, and identify areas of improvement. With solutions, you can get value from Performance Analytics for your application with minimal setup.

Note:
Solutions include some dashboards that are inactive by default. You can activate these dashboards to make them visible to end users according to your business needs.

For unlimited access to all features of this Platform Analytics Solution, purchase a Performance Analytics subscription. For more information, see Activating your Performance Analytics subscription.

To use this Platform Analytics Solution, you must activate your subscription to Performance Analytics for Business Management. For more information about entitlements to Performance Analytics, see Activating your Performance Analytics subscription.

This base system Performance Analytics Solution is available from the ServiceNow Store. To enable this solution, as an admin, navigate to **System Applications** > **Search ServiceNow Store**. When the landing page for the ServiceNow Store opens, search for Performance Analytics Content Pack for Agile 2.0. When you find the solution, follow the instructions in the ServiceNow Store. The ServiceNow Store has its own documentation.

Business stakeholder role support

The business stakeholder role (sn_agile_read) has read-only access to all Agile 2.0 dashboards. For more information, see Business stakeholder role for Agile Development 2.0.

Available dashboards and charts

The Platform Analytics Content Pack for Agile 2.0 includes the following preconfigured dashboards, each containing charts such as burnup, burndown, and cumulative flow diagrams:

- Agile 2.0 Sprint dashboard: Tracks sprint-level progress using burnup, burndown, and cumulative flow charts.
- Agile 2.0 Release dashboard: Tracks release-level progress using burnup, burndown, and cycle time charts.
- Agile 2.0 Team dashboard: Provides velocity history and velocity by type reports.

For more information about using these dashboards, see Agile Development process flow.

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Related topics

Platform Analytics Solutions

Activate your Performance Analytics subscription

Install Performance Analytics Content Pack for Agile 2.0

Install the Performance Analytics Content Pack for Agile 2.0 application from the ServiceNow Store.

Before you begin

- Activate the Agile Development 2.0 (com.snc.sdlc.agile.2.0) plugin.
- Activate the Performance Analytics (com.snc.pa) plugin.

Role required: admin

Note:

- To verify that plugins and applications are installed and activated, navigate to **Subscription Management** > **Subscriptions** in your instance. The list displays the subscriptions your organization has purchased.
- Activation of the Agile Development 2.0 and Performance Analytics plugins on production instances may require separate licenses. Contact ServiceNow Support for details.

Procedure

1. Navigate to ServiceNow® Store.
2. Search for Performance Analytics Content Pack for Agile 2.0.
3. Click the application tile.
   You can view detailed information about the application you are installing.

   Note:
   Consider reading the Other Requirements and Dependencies sections, as applicable.
4. Click **Get** and enter your Now Support login credentials.
5. Click **Request Install**.
6. In the **Instance Name** field, enter your details and click **Validate Instance**.
7. In the **Reason for the Instance** field, enter your details and click **Request**.
   You receive an email with detailed installation instructions.
8. Log in to the instance you want to install Performance Analytics Content Pack for Agile 2.0 on.
9. Navigate to **System Applications** > **Applications**.
10. Locate the application, select it, and click **Install**.

Result

You can access the Agile Development 2.0 dashboard from **Agile Development** > **Dashboards**.

What to do next

Start the [Scrum] Daily Data Collection job. For more information, see Enable daily data collection for Agile 2.0 dashboards.

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Enable daily data collection for Agile 2.0 dashboards

Enable scheduled data collection to begin collecting scores on new data automatically. Data collection jobs automatically collect scores for automated indicators and breakdowns.

Before you begin

Role required: pa_admin or admin

About this task

Note:
Historical data collection is not supported for the underlying indicators of the [Scrum] Daily Data Collection job.

Procedure

1. Navigate to **All** > **Performance Analytics** > **Data Collector** > **Jobs**.
2. Find and open the [Scrum] Daily Data Collection job.
3. Start the [Scrum] Daily Data Collection job.
   a. Scroll down to the Job parameters section.
   b. Set the **Run as** field to a user that has one of the following roles: pa_admin, pa_data_collector, or admin roles.
   c. Verify that the time zone in the **Run As tz** field is appropriate for your organization. This timezone is used for the following:
      - Database queries created for this job
      - Indicator conditions such as [[Created][on][Today]]
   d. Enable the scheduled run of the job by selecting the **Active** checkbox.
4. Click **Update**.

Upgrading the layout of Agile 2.0 dashboards

Upgrade to the latest layout of Agile 2.0 dashboards using Solution Library.

Existing users who upgraded to the latest version 1.1 of Performance Analytics Content Pack for Agile 2.0 can install the latest layout of the dashboards from Solution Library.

For example, if you are upgrading from version 1.0.2 or earlier of the application, then install the following dashboards from Solution Library to access the latest layout:

- Agile 2.0 Epic Dashboard
- Agile 2.0 Sprint Dashboard
- Agile 2.0 Prior Sprint Dashboard
- Agile 2.0 Release Dashboard
- Agile 2.0 Team Dashboard

For more information, see Use Solution Library to install a dashboard.

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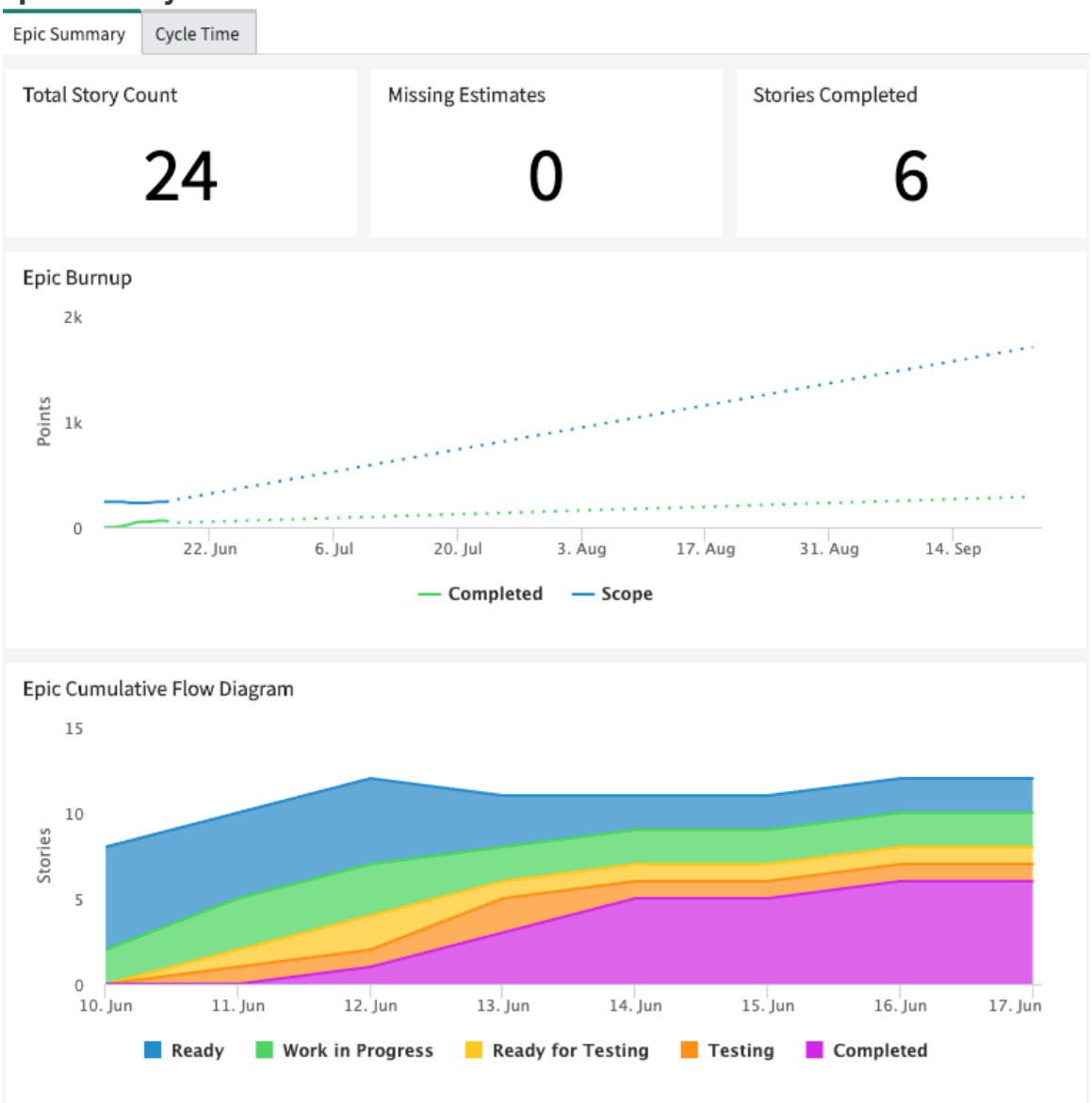
Note:
For users on the Paris release, the **Install** and **Upgrade** buttons are not visible on the Solution Library content form. For information on resolving this issue, see Allow PA Solution Library for Store apps.

Agile 2.0 Epic Dashboard

Visually analyze the progress of the stories of an epic over a given period using the Epic Dashboard.

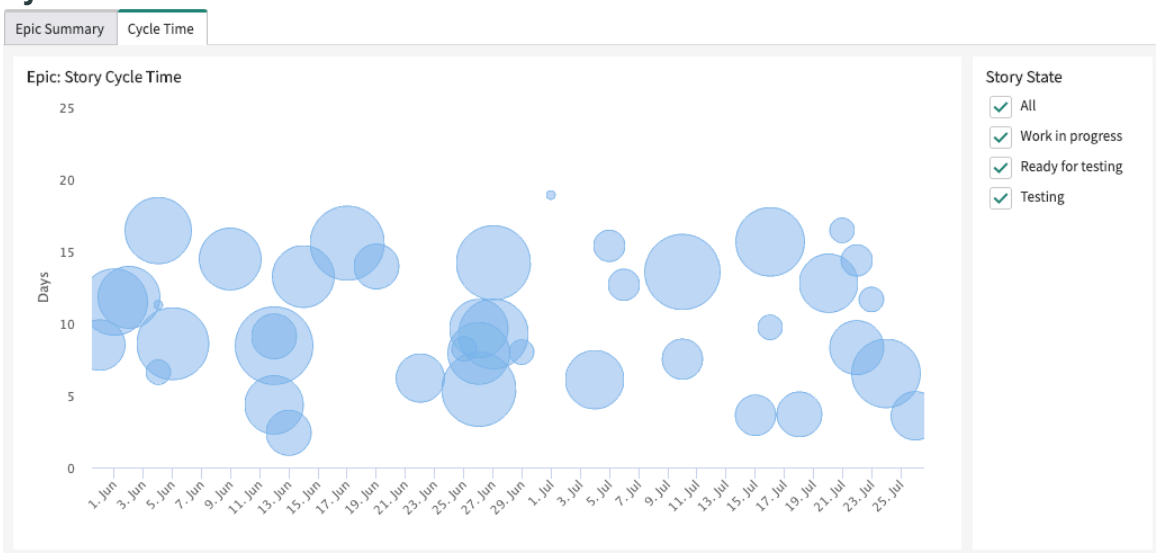
Navigate to **All** > **Agile Development** > **Dashboards** and select **Agile 2.0 Epic Dashboard**.

Epic Summary tab



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Cycle Time tab



The Agile 2.0 Epic Dashboard provides the following information:

- Displays the number of stories that are complete, and number of stories that are missing estimates for an epic.
- Displays the number of stories of the epic in their current state and their progress.
- Indicates the scope changes, if any, and trends of those scope changes.
- Indicates the pace at which the team is working on stories in the epic.
- Forecasts when the epic is likely to be completed based on scope change and completion rate trends.
- Shows time elapsed for the stories of an epic to go from an in-progress state to a completed state.

Canceled stories are not included in any of this data.

End user and roles

End user goal with required role and benefits

End user and goal	Required role	Benefits
Scrum master: Needs clear visibility into real-time progress of team stories and the changes in scope for the epic to complete the epic on time.	scrum_user	• View current states and time in each state for the stories of the epic • View epic burnup trend • Estimate epic completion dates • Identify outlier stories that took longer than expected

Indicators

Scrum: Sum of story points of all stories in epics

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Generates the scope series in the Epic Burnup report, which indicates the size of the epic.

Scrum: Sum of story points of completed stories in epics

Generates the completed series in the Epic Burnup report, which indicates the amount of work that has been completed in the epic.

Scrum: Count of all stories in the current epic

Generates the area series the Epic Cumulative Flow Diagram report, which indicates the number of stories of the current epic by state.

Breakdowns

- Scrum: Epic
- Scrum: State

Widgets

Total Story Count

Indicates the total number of stories in the epic.

Stories Completed

Indicates the number of stories in the epic that are complete.

Missing Estimates

Indicates the number of stories in the epic that are missing estimates.

Data visualizations

If you are upgrading from version 1.0.2 or earlier of Performance Analytics Content Pack for Agile 2.0, then install this dashboard from Solution Library to upgrade its layout and access the following data visualizations:

- Epic Cumulative Flow Diagram
- Story Cycle Time

For more information, see Upgrading the layout of Agile 2.0 dashboards.

Epic Summary

Title	Type	Description
Epic Burnup	 Line chart	Shows the epic burnup trends. You can estimate when the epic completed. The Epic Burnup report comprises the following series that can displayed based on your preference: • **Scope**: Indicates the size of the epic. • **Scope Forecast**: Predicts the possibility of scope change for t which is based on historical data.

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Epic Summary (continued)

Title	Type	Description
		• **Completed**: Indicates the amount of work in the epic that is co • **Completed Forecast**: Predicts the burnup for the future dates whether you can complete the epic on time. This prediction is historical data. **Note:** The point at which the Completed Forecast series intersect crosses the Scope Forecast series is a predictor for when th completed. If the Completed Forecast series and the Scope do not appear to ever intersect, it is a warning that scope is faster than work is being completed.
Epic Cumulative Flow Diagram	Area chart 	Monitor the progress of all the stories of your epic between its a end dates. View the number of stories in each state by their arrival to a stat state, and its departure from this state. The Epic Cumulative Flow Diagram report comprises the followi be hidden or displayed based on your preference: • **Ready**: Indicates the number of stories of the epic that are rea on. • **Work in Progress**: Indicates the number of stories of the epic development. • **Ready for Testing**: Indicates the number stories of the epic th tested. • **Testing**: Indicates the number of stories of the epic that are cu tested. • **Complete**: Indicates the number of stories that are complete. **Note:** Stories in Ready and Cancelled states are not included in th

Cycle Time

Title	Type	Description
Story Cycle Time	Bubble chart 	Identify the time taken for each story in the epic to move from an in-progress state to completion. Each bubble on the graph represents a story. The height of the bubble from the x-axis shows how long that story took to move from an in-progress state to completion. The size of the story bubbles

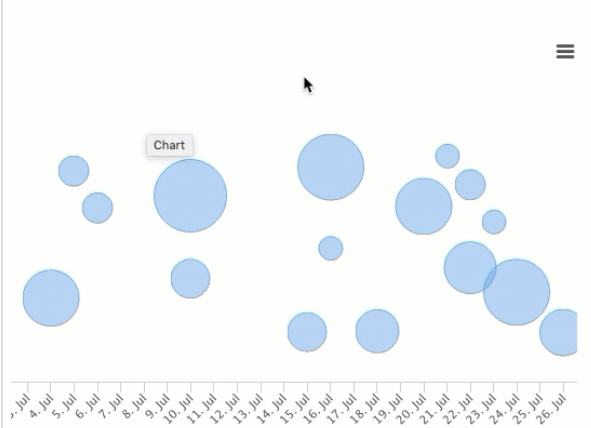
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Cycle Time (continued)

Title	Type	Description
		are relative to each other based on their story points. Hovering your mouse cursor over a bubble displays the following details about that story: • Story points • Date that the story is moved to completion • Total cycle time (in days) of the story • Number of days that the story was in the **Work in progress** state • Number of days that the story was in the **Ready for testing** state • Number of days that the story was in the **Testing** state From the Story State section towards the right of the report, you can filter the report to view the cycle time of the stories for the selected states. The chart displays the cycle time for each story as the cumulative sum of all duration of the selected states. If there are too many stories at any area of the chart and the bubbles appear crowded on the report, you can zoom in that particular area of the report for a clearer view.

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Cycle Time (continued)

Title	Type	Description
		

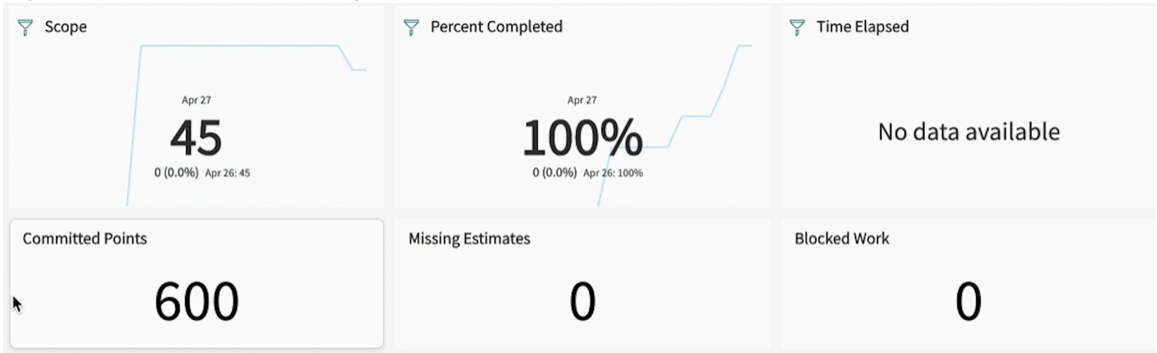
You can customize the Burnup and Cumulative Flow Diagram reports. For more information, see Customizing Agile 2.0 dashboard reports.

Agile 2.0 Sprint Dashboard

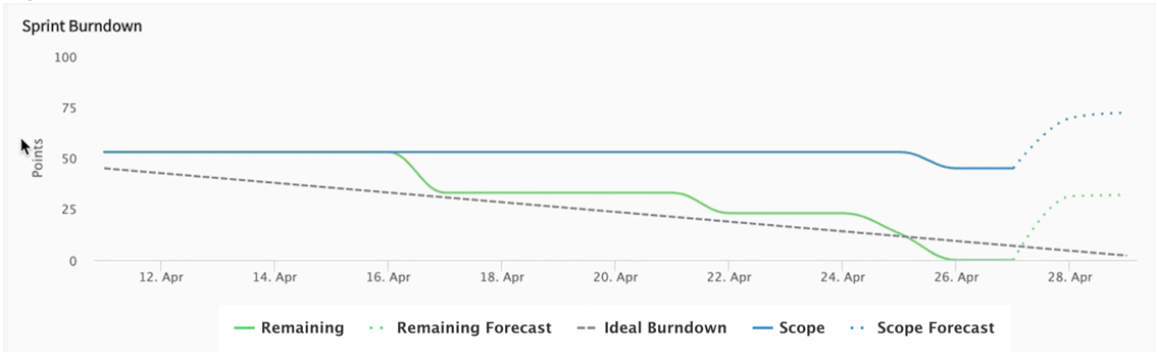
Track the progress of your stories in the current sprint and forecast sprint completion using the Sprint Dashboard.

Navigate to **All** > **Agile Development** > **Dashboards** and select **Agile 2.0 Sprint Dashboard**.

Agile sprint dashboard widgets

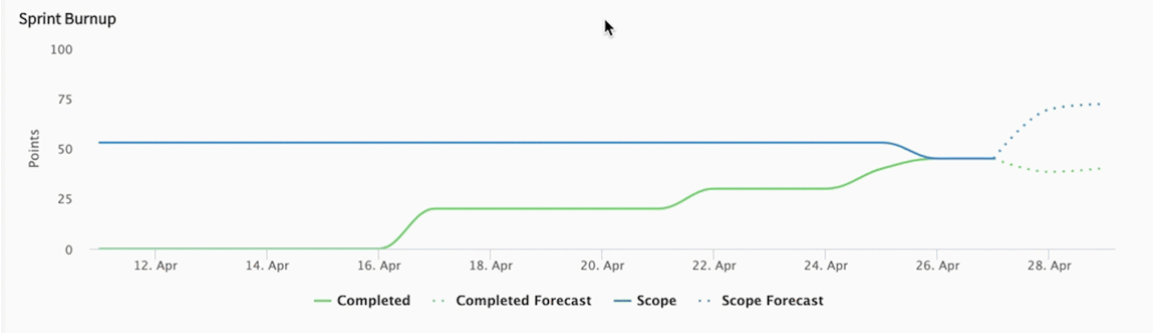


Agile sprint dashboard burndown report

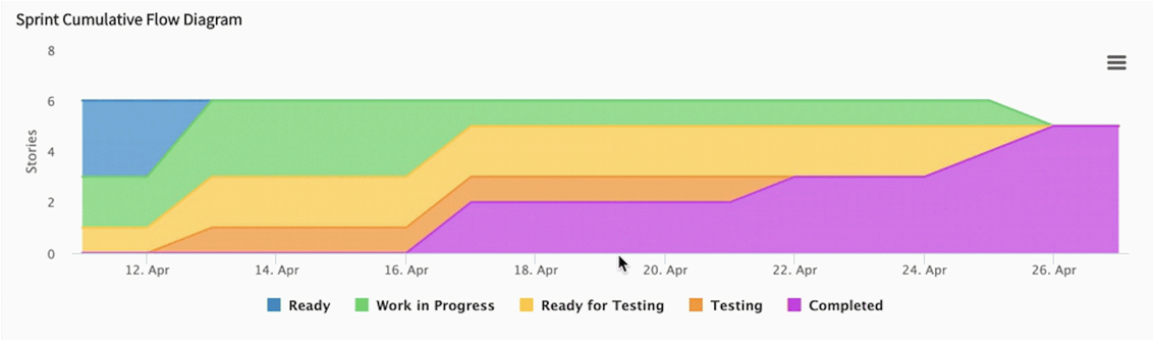


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Agile sprint dashboard burnup visualization



Agile sprint dashboard cumulative flow diagram



The Agile 2.0 Sprint Dashboard provides the following insights:

- Displays details of the sprint such as percentage of work that is complete, time elapsed, and total number of stories that are missing estimates.
- Displays the number of stories of the sprint in their current state and their progress.
- Indicates the scope changes, if any, and trends of those scope changes.
- Indicates the way the team needs to progress on stories to achieve the sprint goal.
- Forecasts data showing the likelihood of completing the sprint as planned.

End user and roles

End user and goal	Required role	Benefits
Scrum master and sprint planner: Need visibility into scope changes, completed and remaining work for a sprint to adjust plans to complete the sprint on time.	scrum_user	• Analyse the sprint burnup and burndown trends • Analyse the scope change for the sprint • View current states and analyse the time in each state for the stories of the sprint • Estimate sprint completion dates

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Indicators

Scrum: Sum of story points of all stories in the current sprint

Generates the scope series in the Sprint Burndown and Burnup reports. The scope series indicates the amount of work (in story points) that is the planned for the sprint.

Scrum: Sum of story points of active stories in the current sprint

Generates the completed series in the Sprint Burndown and Burnup reports. The completed series indicates the amount of work (in story points) completed in the sprint.

Scrum: Time elapsed in sprint

Calculates the time to be displayed in the Time Elapsed widget.

Scrum: Count of all stories in the current sprint

Generates the area series in the Sprint Cumulative Flow Diagram report. It indicates the number of stories in the current sprint.

Scrum: Percent Completed by Points

Calculates the amount of work (in percentage) completed for the sprint. The value is the result of the following formula:

```
([[Scrum: Sum of story points of completed stories in
 current sprint]]/[[Scrum: Sum of story points of all
 stories in the current sprint]]*100)
```

Breakdowns

- Scrum: Sprint
- Scrum: Current Sprint
- Scrum: State

Widgets

Scope

Indicates the amount of work in story points that is planned for the sprint. This widget lets you see at a glance how much work must be completed to achieve the sprint goal. It also lets you drill down to detail on the stories planned into the sprint.

Percent Completed

Indicates the percentage of work that has been completed in the sprint using story points. This widget lets you see at a glance how much work has been completed in the sprint. Together with the adjacent Time Elapsed widget, these widgets let you easily see whether you are completing work at a rate consistent with achieving the sprint goal on schedule.

Time Elapsed

Indicates the percentage of time that has elapsed between the start date and planned end date of the sprint. Together with the adjacent Percent Completed widget, these widgets let you easily see whether you are completing work at a rate consistent with achieving the sprint goal on schedule.

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Committed Points

Indicates the committed scope (in number of story points) of the sprint. Together with the adjacent Scope widget, these widgets let you see difference between the scope committed at the start of the sprint and the current scope of the sprint.

Note:
This widget is not visible by default. You can add it from Reports to your dashboard. For more information, see Edit a responsive dashboard.

Missing Estimates

Indicates the total number of stories in the sprint that are missing estimates. It is required that you use estimates for the other indicators, widgets, and reports on this dashboard to be meaningful.

Tip:
If you do not estimate stories, enter a "1" in the **Story Points** field. The other indicators, widgets, and reports will then effectively function by count.

Blocked Work

Indicates the amount of work (in story points) in the sprint that is blocked.

Data visualizations

If you are upgrading from version 1.0.2 or earlier of Performance Analytics Content Pack for Agile 2.0, then install this dashboard from Solution Library to upgrade its layout and access the following visualizations:

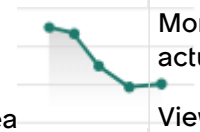
- Sprint Burnup
- Sprint Cumulative Flow Diagram

For more information, see Upgrading the layout of Agile 2.0 dashboards.

Note:
For all reports shown in the Sprint dashboard, the planned end date of the Sprints is used as a filter. Completed Sprints appear in the chart only if their Planned end date is less than or equal to the current date.

Title	Type	Description
Sprint Burndown	 Line	Indicates the scope changes, if any, and trends of those scope changes. Indicates the ideal pace of work, how much work is remaining, and if the scope is likely to be completed before the end of the sprint. The Sprint Burndown report comprises the following series that can be hidden or displayed based on your preference: • **Scope**: Indicates the amount of work that is planned for the sprint. • **Scope Forecast**: Predicts the possibility of scope change for the future dates, which is based on historical data. • **Ideal Burndown**: Indicates how the team needs to progress on stories to complete the sprint on time.

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Title	Type	Description
		• **Remaining**: Indicates the amount of work left for completion in the sprint. If the actual burndown is above the ideal burndown, it implies that there is more work left than originally estimated. The team is running behind the schedule of the sprint. If the actual burndown is below the ideal burndown, it implies that there is less work left than originally estimated. The team is running ahead of the schedule of the sprint. • **Remaining Forecast**: Predicts the burndown for the future dates. It indicates whether you can complete the sprint on time. The prediction is based on historical data.
Sprint Burnup	Line 	Shows the sprint burnup trend indicating scope changes. Forecasts future changes in scope and the trend of work completion. The Sprint Burnup report comprises the following series that can be hidden or displayed based on your preference: • **Scope**: Indicates the amount of work that is planned for the sprint. • **Scope Forecast**: Predicts the possibility of scope change for the future dates, which is based on historical data. • **Completed**: Indicates the amount of work completed in the sprint. • **Completed Forecast**: Predicts the burnup for the future dates. It indicates whether you can complete the sprint on time. The prediction is based on historical data.
Sprint Cumulative Flow Diagram	Area 	Monitor the progress of all the stories of your sprint between its actual start and end dates. View the number of stories in each state by their arrival to a state, time in this state, and its departure from this state. The Sprint Cumulative Flow Diagram report comprises the following areas that can be hidden or displayed based on your preference: • **Ready**: Indicates the number of stories in the sprint that are ready to start work on. • **Work in Progress**: Indicates the number of stories in the sprint that are in development. • **Ready for Testing**: Indicates the number stories in the sprint that are ready to be tested. • **Testing**: Indicates the number of stories in the sprint that are currently being tested. • **Complete**: Indicates the number of stories in the sprint that are complete.

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Title	Type	Description
		Note: Stories in Ready and Cancelled states are not included in this report.

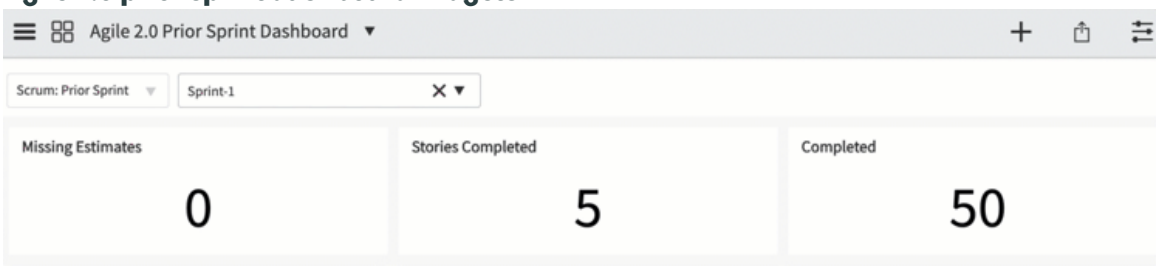
You can customize the Burnup, Burndown, and Cumulative Flow Diagram reports. For more information, see Customizing Agile 2.0 dashboard reports.

Agile 2.0 Prior Sprint Dashboard

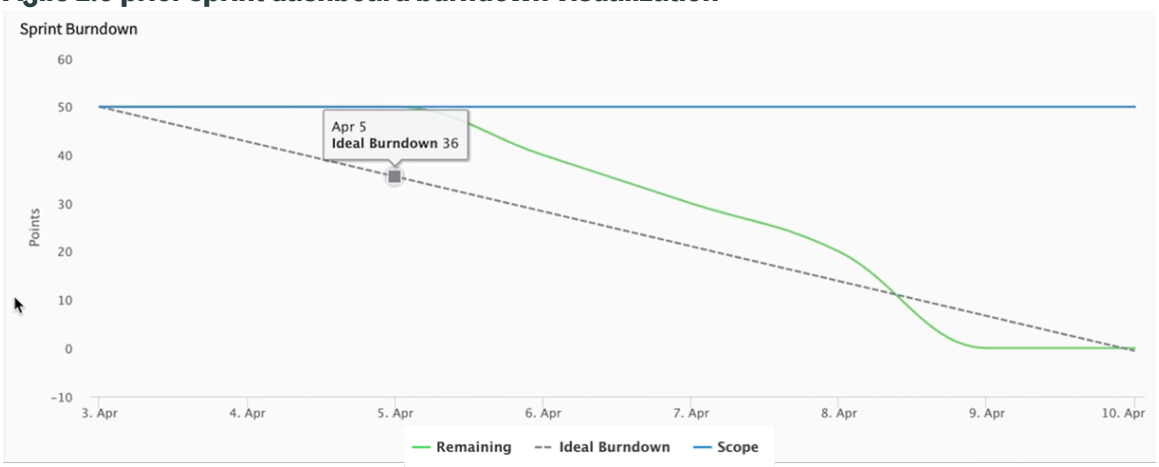
Prior Sprint Dashboard provides data visualization on scope, actual burndown and burnup, and forecast trends of previous sprints. Analyze the data and plan the work for upcoming sprints.

Navigate to **All** > **Agile Development** > **Dashboards** and select **Agile 2.0 Prior Sprint Dashboard**.

Agile 2.0 prior sprint dashboard widgets



Agile 2.0 prior sprint dashboard burndown visualization



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Agile 2.0 prior sprint dashboard burnup visualization



Note:
Canceled stories are not included in any of this data.

End user and roles

End user and goal	Required role	Benefits
Scrum master and sprint planner: Need visibility into actual changes in scope and forecast trends of the previous sprints.	scrum_user	• Analyze sprint burndown and burnup trends • Use the data to plan for upcoming sprints

Indicators

The following are the indicators which are used to generate the data for the reports of this dashboard.

Scrum: Sum of story points of all stories in the current sprint

Generates the scope series in the Sprint Burndown and Sprint Burnup reports.

Scrum: Sum of story points of active stories in the current sprint

Generates the completed series in the Sprint Burndown and Sprint Burnup reports.

Breakdowns

The following are the breakdowns used by the indicators.

- Scrum: Sprint
- Scrum: Prior Sprint

Widgets

Committed points

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Indicates the committed scope (in number of story points) of the sprint.

Stories Completed

Indicates the total number of stories that were completed in the previous sprint.

Completed

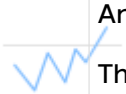
Indicates the amount of work (in story points) that was completed in the previous sprint.

Missing Estimates

Indicates the total number of stories in the previous sprint that were missing estimates.

Data visualizations

If you are upgrading from version 1.0.2 or earlier of Performance Analytics Content Pack for Agile 2.0, then install this dashboard from Solution Library to upgrade its layout and access the Sprint Burnup visualization. For more information, see Upgrading the layout of Agile 2.0 dashboards.

Title	Type	Description
Sprint Burndown	Line chart 	Indicates the scope changes, if any, and trends of those scope changes. Indicates the ideal pace of work, how much work is remaining, and if the scope is likely to be completed before the end of the sprint. The Sprint Burndown report comprises the following series that can be hidden or displayed based on your preference: • **Scope**: Indicates the amount of work that is planned for the sprint. • **Ideal Burndown**: Indicates how the team needs to progress on stories to complete the sprint on time. • **Remaining**: Indicates the amount of work left for completion in the sprint. If Remaining is above the Ideal Burndown, it implies that there is more work left than originally estimated. The team is running behind the schedule of the sprint. If Remaining is below Ideal Burndown, it implies that there is less work left than originally estimated. The team is running ahead of the schedule of the sprint. Analyze the burndown trends and accordingly plan the workload for an upcoming sprint.
Sprint Burnup	Line chart 	Shows the previous sprint burnup trend indicating scope changes. Analyze future changes the trend of team's work completion. The Sprint Burnup report comprises the following series that can be hidden or displayed based on your preference: • **Scope**: Indicates the amount of work that is planned for the sprint. • **Completed**: Indicates the amount of work completed in the sprint.

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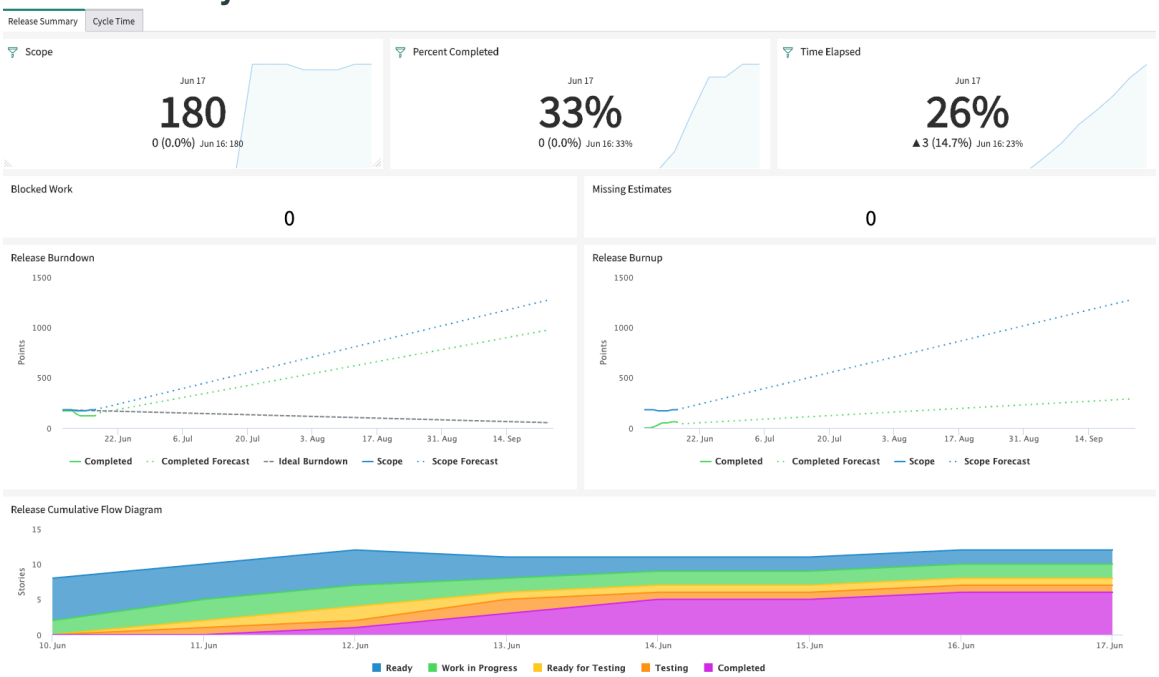
You can customize the Burnup and Burndown reports. For more information, see Customizing Agile 2.0 dashboard reports.

Agile 2.0 Release Dashboard

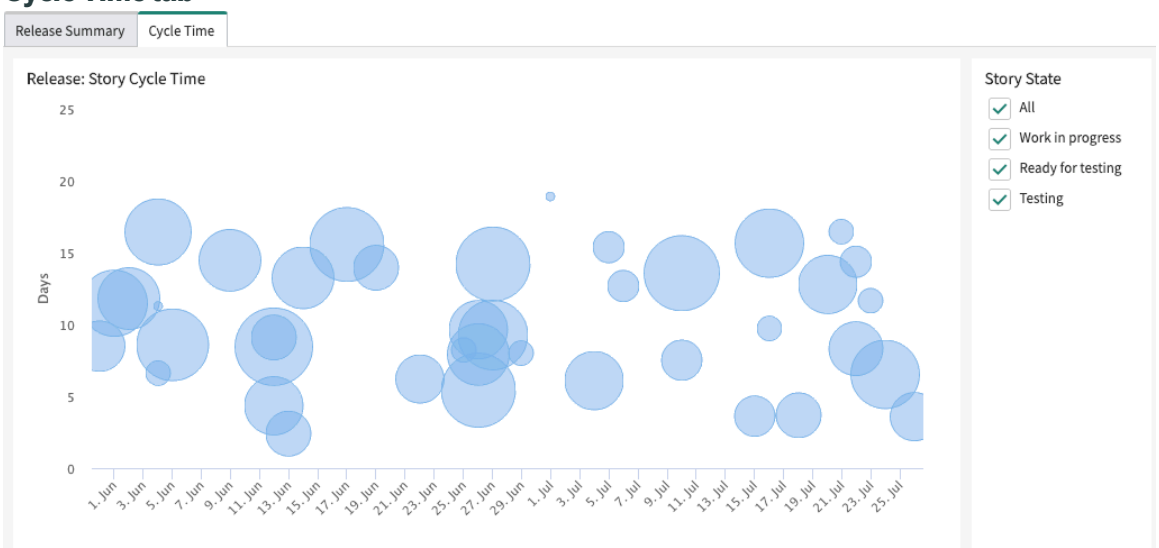
Track the progress of your stories and analyze scope changes in the current release using Agile 2.0 Release Dashboard.

Navigate to **All** > **Agile Development** > **Dashboards** and select **Agile 2.0 Release Dashboard**.

Release Summary tab



Cycle Time tab



The dashboard:

- Displays important details of the release such as percentage of work that is complete, time elapsed, and total number of stories that are missing estimates.
- Displays the number of stories of the release in their current state and their progress.
- Indicates the scope changes, if any, and trends of those scope changes.

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- Indicates the pace at which the team is completing stories that are planned for the release.
- Forecasts data showing the likelihood of completing the release as planned.
- Shows time elapsed for the stories of a release to go from an in-progress state to a completed state.

Note:
Canceled stories are not included in any of this data.

End user and roles

End user goal with required role and benefits

End user and goal	Required role	Benefits
Product owner: Needs visibility into scope changes, team's pace, and real-time progress of the stories for the release.	scrum_user	• Track progress of your stories that are planned for a release • Resolve any bottlenecks to deliver the release on time • Identify outlier stories that took longer than expected

Indicators

Scrum: Sum of story points of completed stories in the active releases

Generates the Completed series in the Release Burndown and Burnup reports. These series indicate the amount of work in story points that has been completed for the release.

Scrum: Sum of story points of active stories in the current releases

Generates the scope series in the Release Burndown and Release Burnup reports. The scope series indicates the amount of work in story points that is planned for the release.

Scrum: Time elapsed in the release

Calculates the time to be displayed in the Time Elapsed widget.

Scrum: Count of all stories in the current release

Generates the area series in the Release Cumulative Flow Diagram report, which indicates the number of stories of the current release by state.

Breakdowns

- Scrum: Release
- Scrum: State

Widgets

Percent Completed

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Indicates the percentage of work (in story points) that has been completed in the release. This widget lets you see at a glance how much work has been completed in the release. Together with the adjacent Time Elapsed widget, these widgets let you easily see whether you are completing work at a rate consistent with achieving the release goal on schedule.

Scope

Indicates the amount of work in story points that is planned for the release. This widget lets you see at a glance how much work must be completed to achieve the releaser goal. It also lets you drill down to detail on the stories planned into the release.

Time Elapsed

Indicates the percentage of time that has elapsed between the start date and planned end date of the release. Together with the adjacent Percent Completed widget, these widgets let you easily see whether you are completing work at a rate consistent with achieving the Release goal on schedule.

Blocked Work

Indicates the total number of stories in the release that are missing estimates. It is required that you use estimates for the other indicators, widgets, and reports on this dashboard to be meaningful.

Note:
If you do not estimate stories, enter a "1" in the **Story Points** field. The other indicators, widgets, and reports will then effectively function by count.

Blocked Work

Indicates the number of stories in the release that are missing estimates.

Data visualizations

If you are upgrading from version 1.0.2 or earlier of Performance Analytics Content Pack for Agile 2.0, then install this dashboard from Solution Library to upgrade its layout and access the following visualizations:

- Release Cumulative Flow Diagram
- Story Cycle Time

For more information, see Upgrading the layout of Agile 2.0 dashboards.

Release Summary

Title	Type	Description
Release Burnup	Line 	Analyse the burnup trends, and estimate when the release work is likely to be completed. The release burnup report comprises the following series that can be hidden or displayed based on your preference: • **Scope**: Indicates the amount of work that is planned for the release. • **Scope Forecast**: Predicts the possibility of scope change for the future dates. This prediction is based on historical data.

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Release Summary (continued)

Title	Type	Description
		• **Completed**: Indicates the amount of release work that is complete. • **Completed Forecast**: Predicts the burnup for the future dates in the release. It indicates whether you can deliver the release on time. **Note:** The point at which the Completed Forecast series intersects with or crosses the Scope Forecast series is a predictor for when the release might be completed. If the Completed Forecast series and the Scope Forecast series do not appear to ever intersect, it is a warning that scope is being added faster than work is being completed.
Release Burndown	Line 	Indicates the scope changes, if any, and trends of those scope changes. Indicates the ideal pace of work, how much work is remaining, and if the scope likely to be completed before the end of the sprint. The Release Burndown report comprises the following series that can be hidden or displayed based on your preference: • **Scope**: Indicates the amount of work that is planned for the release. • **Scope Forecast**: Predicts the possibility of scope change for the future dates in the release. This prediction is based on historical data. • **Ideal Burndown**: Indicates how the team needs to progress on stories to deliver the release on time. • **Remaining**: Indicates the amount of work that is completed. If Remaining is above the ideal burndown, it implies that there is more work left than originally estimated. The team is running behind the schedule of the release. If the Remaining is below the ideal burndown, it implies that there is less work left than originally estimated. The team is running ahead of the schedule of the release. • **Completed Forecast**: Predicts the burndown for the future dates in the release. It indicates whether you can deliver the release on time.
Release Cumulative Flow Diagram	Area 	Monitor the progress of all the stories of your release between its actual start and end dates. View the number of stories in each state by their arrival to a state, time in this state, and its departure from this state.

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Release Summary (continued)

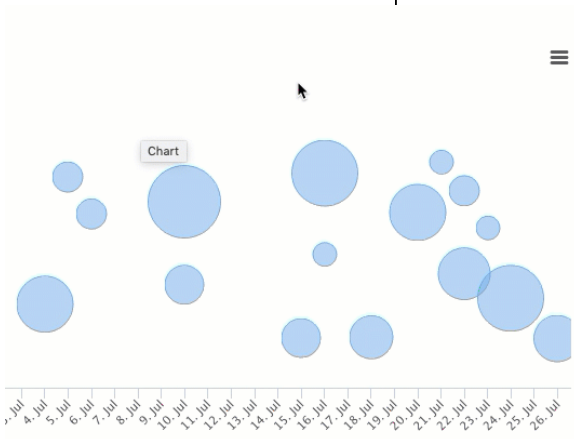
Title	Type	Description
		The Release Cumulative Flow Diagram report comprises the following areas that can be hidden or displayed based on your preference: • **Ready**: Indicates the number of stories in the release that are ready to start work on. • **Work in Progress**: Indicates the number of stories in the release that are in development. • **Ready for Testing**: Indicates the number stories in the release that are ready to be tested. • **Testing**: Indicates the number of stories in the release that are currently being tested. • **Complete**: Indicates the number of stories in the release that are complete. **Note:** Stories in Ready and Cancelled states are not included in this report.

Cycle Time

Title	Type	Description
Story Cycle Time	Bubble chart 	Identify the time taken for each story in the release to move from an in-progress state to completion. Each bubble on the graph represents a story. The height of the bubble from the x-axis shows how long that story took to move from an in-progress state to completion. The size of the story bubbles are relative to each other based on their story points. Hovering your mouse cursor over a bubble displays the following details about that story: • Story points • Date the story is moved to completion • Total cycle time (in days) of the story • Number of days that the story was in the **Work in progress** state

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Cycle Time (continued)

Title	Type	Description
		• Number of days that the story was in the **Ready for testing** state • Number of days that the story was in the **Testing** state From the Story State section towards the right of the report, you can filter the report to view the cycle time of the stories for the selected states. The chart displays the cycle time for each story as the cumulative sum of all duration of the selected states. If there are too many stories at any area of the chart and the bubbles appear crowded on the report, you can zoom in that particular area of the report for a clearer view. 

You can customize the Burnup, Burndown, and Cumulative Flow Diagram reports. For more information, see Customizing Agile 2.0 dashboard reports.

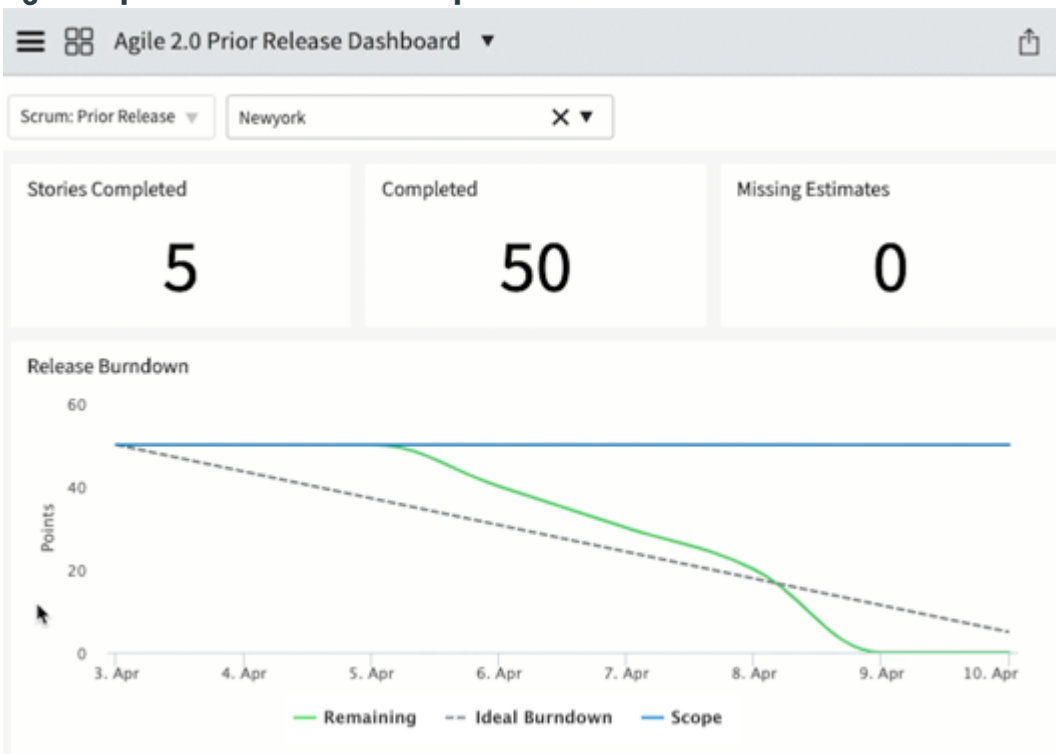
Agile 2.0 Prior Release Dashboard

Prior Release Dashboard provides data visualization on scope, actual burnup and burndown, and forecast trends of previous releases. Analyze the data and plan the work for upcoming releases.

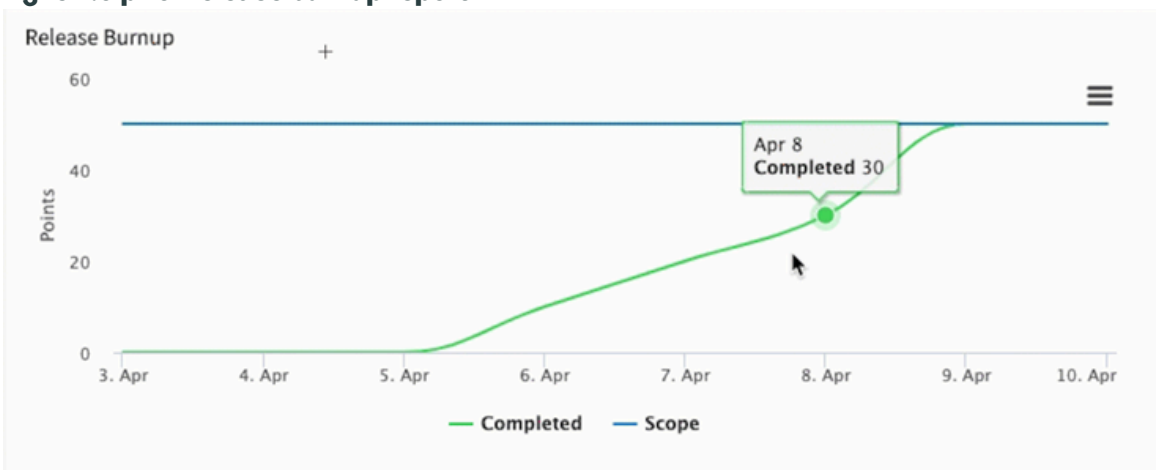
Navigate to **All** > **Agile Development** > **Dashboards** and select **Agile 2.0 Prior Release Dashboard**.

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Agile 2.0 prior release burndown report



Agile 2.0 prior release burnup report



Note:
Canceled stories are not included in any of this data.

End user and roles

End user goal with required role and benefits

End user and goal	Required role	Benefits
Product owner: Needs visibility into actual changes in scope and forecast trends of the previous releases.	scrum_user	Analyze trends for the following: • Scope changes • Previous releases

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Indicators

Scrum: Sum of story points of completed stories in the active releases

Generates the actual burndown series in the Release Burndown report, and the completed series in the Release Burnup report.

Scrum: Sum of story points of all stories in active releases

Generates the scope series in the Release Burndown and Release Burnup reports.

Breakdowns

- Scrum: Release
- Scrum: Prior release

Widgets

Stories Completed

Indicates the total number of stories that were completed in the previous release.

Completed

Indicates the amount of work (in story points) that was completed in the previous release.

Missing Estimates

Indicates the total number of stories in the release that are missing estimates.

Data visualizations

Prior release Summary

Title	Type	Description
Release Burnup	Line chart 	Analyze the burnup trends of a previous release. The prior release burnup report comprises the following series that can be hidden or displayed based on your preference: • **Scope**: Indicates the amount of work that was planned for the release. • **Completed**: Indicates the amount of release work that is complete for this release.
Release Burndown	Line chart 	Shows the scope and rate of scope change, the ideal rate for work completion, and the actual rate of work completion. Analyze the burndown trends and accordingly plan the workload for an upcoming release. The prior release burnup report comprises the following series that can be hidden or displayed based on your preference: • **Scope**: Indicates the amount of work that was planned for the release. • **Ideal Burndown**: Indicates how the team had to progress on stories to deliver the release on time.

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Prior release Summary (continued)

Title	Type	Description
		• **Remaining**: Indicates the amount of work that is completed. If the actual burndown (Remaining) is above the ideal burndown, it implies that the team was running behind the schedule of the release. If the actual burndown (Remaining) is below the ideal burndown, it implies that the team was running ahead of the schedule of the release.

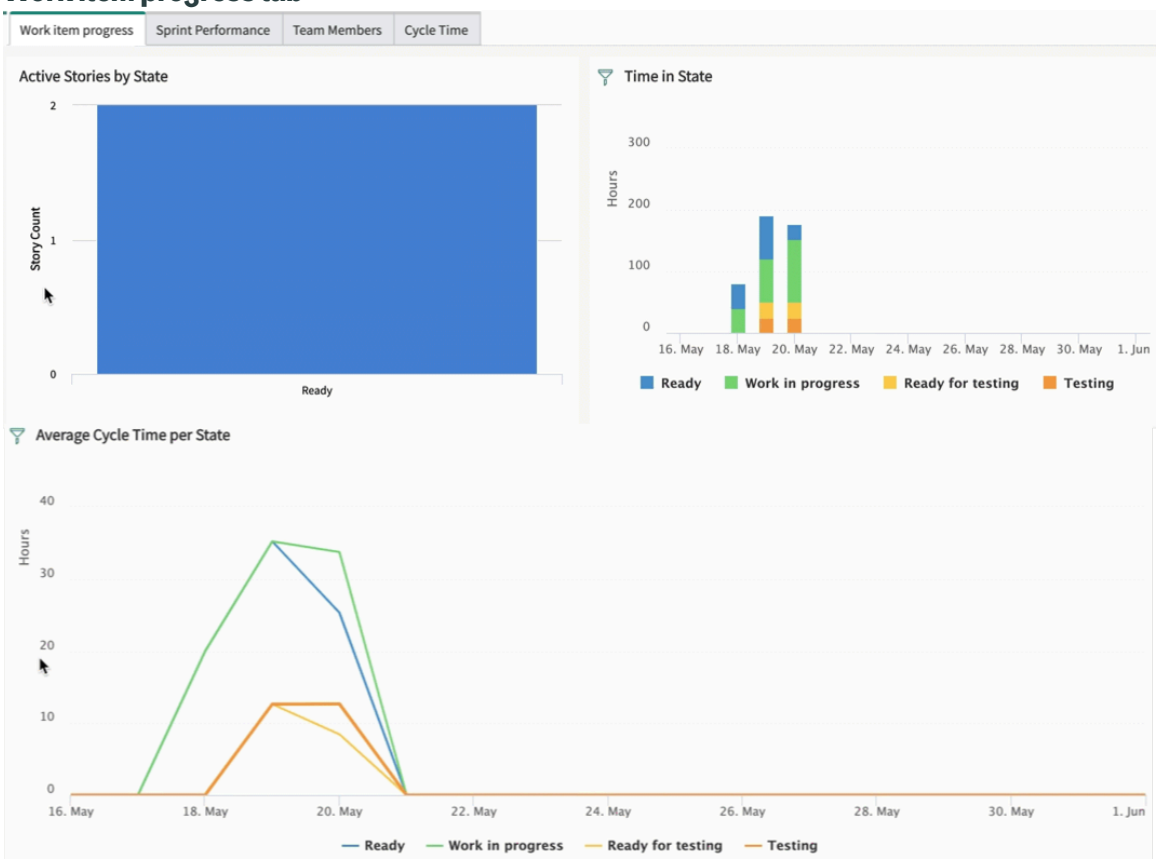
You can customize the Burnup and Burndown reports. For more information, see Customizing Agile 2.0 dashboard reports.

Agile 2.0 Team Dashboard

Team Dashboard provides a visualization of the team's progress on stories over a given period. It provides team predictability charts and helps you plan the team's capacity for the upcoming sprints. In addition, it provides details of all the team members.

Navigate to **All** > **Agile Development** > **Dashboards** and select **Agile 2.0 Team Dashboard**.

Work item progress tab



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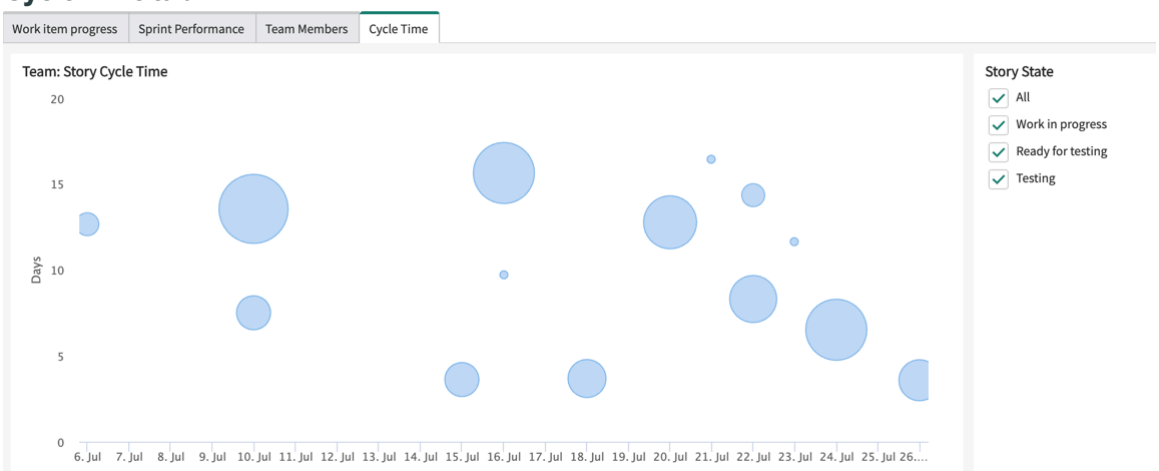
Sprint Performance tab



Team Members tab



Cycle Time tab



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End user and roles

End user goal with required role and benefits

End user and goal	Required role	Benefits
Team member: Needs visibility into team's predictability and progress in completing stories	scrum_user	• View progress of the team by work items • Analyze the time taken for stories to move from one state to another • Analyze sprint performance of the team • Analyze trends in sprint variance of the team comparing completed work to expected capacity and committed work

Indicators

Scrum: Scrum: Average Story State Duration

Generates data that is displayed in the Average Cycle Time per State report.

Scrum: Story State Duration

Generates data that is displayed in the Time in State report.

Scrum: Total stories in a sprint

Generated data that is displayed in the Active Stories by State report.

Breakdowns

- Scrum: Group
- Scrum: State

Data visualizations

The Team Dashboard reports are segregated into the following three tabs:

- Work item progress: Reports of Active Stories by State, Time in State, and Average Cycle Time per State
- Sprint Performance: Reports of Velocity History and Sprint Variance
- Team Members: List of all the members of the team

Note:
For existing customers who upgrade to the latest version, the list of the team members appears in both the Work item progress and Team Members tabs but only one of these locations would display the accurate information. You can remove this widget from the Work item progress tab to avoid this issue. For more information on how to remove a widget, see Edit a responsive dashboard.

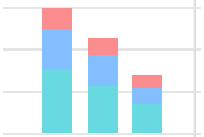
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If you are upgrading from version 1.0.2 or earlier of Performance Analytics Content Pack for Agile 2.0, then install this dashboard from Solution Library to upgrade its layout and access the following visualizations:

- Velocity History
- Velocity by Type
- Sprint Variance
- Story Cycle Time

For more information, see Upgrading the layout of Agile 2.0 dashboards.

Work item progress

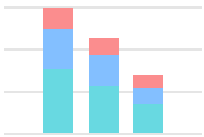
Title	Type	Description
Active Stories by State	Bar chart 	View the total number of stories in each state of a story, for example, testing, work in progress, and testing.
Time in State	Stacked bar chart 	View the time in hours that the team spends in each state of a story.
Average Cycle Time per State	Line chart 	View how the work in progress is trending over time and what are the most significant cycle times.

Sprint Performance

Title	Type	Description
Velocity History	Bar chart 	Gain an insight on the overall velocity of the team for the past 10 sprints. Understand if the team is achieving a stable, predictable velocity, and is meeting the commitments. The Team Velocity History report comprises the following series per sprint that can be hidden or displayed based on your preference:

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Sprint Performance (continued)

Title	Type	Description
		• **Team Capacity**: Indicates the team capacity (in story points) for the sprint. • **Committed Story Points**: Indicates the number of story points committed by the team for the sprint. • **Completed Story Points**: Indicates the number of story points completed by the team for the sprint. • **Average Completed Points**: Indicates the average number of story points completed by the team for the sprint. • **Linear (Actual)**: Indicates if the amount of completed work is trending up, trending down, or relatively stable over sprints.
Velocity by Type	Stacked bar chart 	Analyze the way your team's velocity changes over time and compare the team's strategic workload with operational or other types of workload. The bar charts have two stacks that show the sum of the story points of the following types of completed stories: • Regular stories • Stories added to the unified backlog from the items in the triage board Clicking any bar would take you to its corresponding sprint details. Data displayed in this report is of the past 10 sprints with the earliest sprint on the left.

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Sprint Performance (continued)

Title	Type	Description
		Note: This report is not available by default. You can add it from Scrum custom charts to your dashboard. For more information, see Edit a responsive dashboard.
Sprint Variance	Bar chart 	Analyze the percentage variance of the team compared to the capacity and committed points, for the past 10 sprints. The Team Sprint Variance report comprises the following series per sprint that can be hidden or displayed based on your preference: • **Completed to Capacity**: Indicates the percentage of completed work compared to the expected capacity for the sprint. • **Completed to Committed**: Indicates the percentage of completed work compared to the committed work of the team for the sprint.

Team Members

Title	Type	Description
Team Members	List	View the details of all team members.

Cycle Time

Title	Type	Description
Story Cycle Time	Bubble chart 	Identify the time taken for each story, which the team has worked on, to move from an in-progress state to completion. Each bubble on the graph represents a story. The height

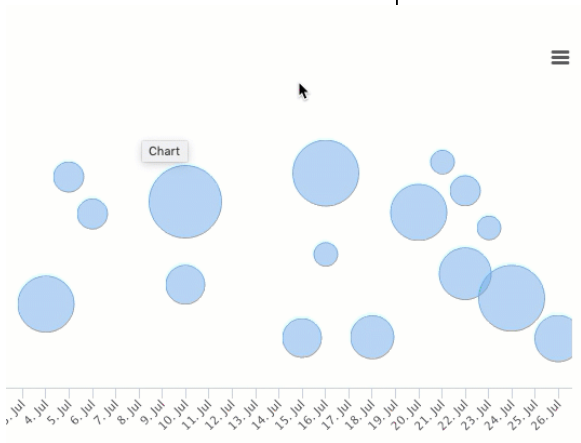
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Cycle Time (continued)

Title	Type	Description
		of the bubble from the x-axis shows how long that story took to move from an in-progress state to completion. The size of the story bubbles are relative to each other based on their story points. You can compare the cycle times of stories with different story points and analyze the trend in the time taken by the team to complete them. Identify the stories that took longer to complete and analyze the reasons so that you can chart an action plan to reduce the team's cycle time in the future. Hovering your mouse cursor over a bubble displays the following details about that story: • Story points • Date the story is moved to completion • Total cycle time (in days) of the story • Number of days that the story was in the **Work in progress** state • Number of days that the story was in the **Ready for testing** state • Number of days that the story was in the **Testing** state From the Story State section towards the right of the report, you can filter the report to view the cycle time of the stories for the selected states. The chart displays the cycle time for each story as the cumulative sum of all duration of the selected states. If there are too many stories at any area of the chart and

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Cycle Time (continued)

Title	Type	Description
		the bubbles appear crowded on the report, you can zoom in that particular area of the report for a clearer view.  **Note:** The stories shown in this chart are the ones that the team has completed in the past 30 days.

Customizing Agile 2.0 dashboard reports

Customize the Burnup, Burndown, and Cumulative Flow Diagram reports of your Agile 2.0 dashboards according to the custom states of your scrum stories.

- Configure indicators to reflect your customizations.

  For example, if there are any new states introduced to the scrum story table, then the corresponding indicators and indicator sources for the story table that rely on the **State** field must be updated as well.

  For more information, see Customize indicators of your Agile 2.0 dashboard reports.

- Update or clone UI scripts for modifications to use your own indicators.

  Add customizations by overriding methods in empty implementation (Impl) classes of UI scripts such as ScrumAreaChartImpl and ScrumVelHistoryImpl.

  For more information, see Update UI scripts to use customized indicators for Agile 2.0 dashboards.

Customize indicators of your Agile 2.0 dashboard reports

Configure indicators to reflect your customizations on the Agile 2.0 dashboards.

Before you begin
Role required: admin or pa_admin

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Procedure

1. Navigate to **All** > **Performance Analytics** > **Indicators** > **Automated Indicators**.
2. Search for and open the required indicator.
   For example, if you want to customize the Sprint Burnup report, open Scrum: Sum of story points of completed stories in current sprint from the list of indicators.
3. In the Additional conditions section, modify the conditions according to your preferences.
4. Click **Update**.

Update UI scripts to use customized indicators for Agile 2.0 dashboards

Customize UI scripts by overriding methods in empty implementation (Impl) classes.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System UI** > **UI Scripts**.
2. Search for and open the required UI script.
   For example, if you want to customize the Sprint Cumulative Flow Diagram report, open ScrumAreaChartImpl from the list of UI scripts.
3. Overwrite the base implementation according to your preferences.
4. Click **Update**.

Customize story states of your Agile Development 2.0 dashboard reports

Configure story states to reflect your customizations on the Agile Development 2.0 dashboards.

Before you begin
Role required: admin or pa_admin

Procedure

1. Navigate to **All** > **Agile Development** > **Stories**.
2. Open a story to which you would like to add the custom states.
3. Right-click **State** and select **Configure Choices** from the drop-down menu.
4. In the **New item text** field, enter the new custom state name.
5. In the **Numeric value** field, enter any corresponding number.
6. Click **Add**.
   The new state appears in the Selected list.
7. Click **Save**.

Integrating Agile Development 2.0 with third-party applications

Integrate third-party applications such as Microsoft Azure DevOps or Atlassian Jira with Agile Development 2.0, so that the planned and executed work can be synchronized in both applications.

After the integration is set up, plan the work, such as epics and stories, in Agile Development 2.0 and enable your teams to deliver using the execution application of their choice, such as Microsoft Azure DevOps or Atlassian Jira.

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All the existing work items are synced between the two applications. New items that are created in either application are easily exported and imported between each other. Changes made to these items would automatically synchronize between the two applications.

To get started with configuring these integrations, see:

- Microsoft Azure DevOps Integration for Agile Development
- Atlassian Jira Integration for Agile Development

Atlassian Jira Integration for Agile Development

Enable bidirectional synchronization of records between Atlassian Jira and ServiceNow® Agile Development by integrating the two applications.

If the source of your work is in the ServiceNow platform while the progress of the work is tracked in Jira, you can perform integrated tracking of your product development efforts by integrating Agile Development 2.0 with Jira.

For example, if you update a record in Jira, you can find that update in Agile Development 2.0. Similarly, if you update a record in Agile Development 2.0, you can find the same update in Jira.

When you synchronize Jira with Agile Development 2.0, you can:

- View available Jira projects and boards in Agile Development 2.0.
- Perform a bulk import of records from Jira to Agile Development 2.0.
- Perform single record updates between Jira and Agile Development 2.0.
- Avoid duplicating record update entries in Jira and Agile Development 2.0.
- Plan, track, and update your tasks from a single application.

Starting with version 1.1.1, Atlassian Jira Integration for Agile Development 2.0 supports map configuration at the project level and not at the instance level. Also, the application supports the following project types associated with Jira Cloud and Jira Server:

- Classic
  - Scrum
  - Kanban
  - Bug tracking
- Next-gen
  - Scrum
  - Kanban

Note:
Integration with Jira Data Center, Jira Align and other Atlassian products is not available.

Importing issues from Kanban projects in Jira

Before importing Jira projects that are of the Kanban type, consider the following notes:

- Issues such as epics and stories are imported to Agile Development 2.0
- If your Kanban project has one or more Jira Boards, not all those Boards would be mapped to distinct Agile groups. The Jira project is mapped to a single group in Agile Development 2.0 and all issues of this project, regardless of their association to boards, would be assigned to one Agile group.

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Request apps on the Store

Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Install Atlassian Jira Integration for Agile Development

Install the Atlassian Jira Integration for Agile Development (sn_agile_jira_int) application v2.0.1 from ServiceNow Store.

Before you begin

Ensure that the application and all of its associated store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

Complete the following setup tasks for a smooth installation and configuration.

1. Navigate to **Subscription Management** > **Subscriptions** in your instance. The list displays the subscriptions that your organization has purchased.
2. Verify that Agile Development 2.0 (com.snc.sdlc.agile.2.0) is activated.
3. Verify that ServiceNow Integration Hub Starter Pack Installer (com.glide.hub.integrations) is activated.
4. Verify that Jira Spoke 2.6.8 (sn_jira_spoke) is activated.
5. Verify that Integrations - External Authentication Framework (com.glide.external.app) is activated.

Role required: admin

Note:
Activation of the Agile Development 2.0, ServiceNow Integration Hub Starter Pack Installer, Jira Spoke, and Integrations - External Authentication Framework plugins on production instances may require separate licenses. Contact ServiceNow Customer Support for details.

Procedure

1. Navigate to the ServiceNow Store.
2. In the ServiceNow Store, search for Atlassian Jira Integration for Agile Development.
3. Click the application tile.
   You can view detailed information about the application. Consider reading the Other Requirements and Dependencies sections, as applicable.
4. Click **Get** and enter your Now Support login credentials.
5. Click **Request Install**.
6. In the **Instance Name** field, enter your details and click **Validate Instance**.
7. In the **Reason for the Instance** field, enter your details and click **Request**.
   You receive an email with detailed installation instructions.
8. Log in to the instance on which you want to install the Atlassian Jira Integration for Agile Development application.
9. Select **System Applications** > **All Available Applications** > **All**.
10. Locate the application using the filter criteria and search bar, select it, and click **Install**.

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Result
The following components are installed with installation of the application:

- Roles
- Scheduled Jobs
- Tables

For more information, see Components installed with Atlassian Jira integration for Agile Development.

Components installed with Atlassian Jira integration for Agile Development

Several types of components are installed with activation of the Atlassian Jira integration for Agile Development application, including tables, user roles, and scheduled jobs.

Note:
The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Roles installed

Role title [name]	Description	Contains roles
Jira integration admin [sn_jira_int.admin]	Has complete access to the application	• sn_int_common.admin • sn_jira_int.user
Jira integration user [sn_jira_int.user]	• Sets up integration between Jira and Agile Development • Can create new or update the existing map configurations between Jira and Agile Development	• connection_admin • sn_int_common.user • credential_admin

Scheduled jobs installed

Scheduled job	Description
Import Jira Issue	Imports issues and sprints from Jira automatically at a scheduled time. This job is inactive by default. For more information, see Schedule a job to auto-import issues from Jira to Agile Development 2.0.

Tables installed

Table	Description
Attachment Map	Stores the mapping of attachments to issues between Jira and Agile Development.

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Table	Description
[sn_int_common_attachment_map]	
Choice Map [sn_int_common_choice_map]	Stores the list of workflow state mapping for Jira projects.
Event Type [sn_int_common_input_event_type]	Stores information of the type of webhook events such as create, update, or delete of a work item.
External Identifiers [sn_int_common_external_identifiers]	Stores the list of all Jira reference identifiers such as External ID, External Key, External Project, External URL, and so on.
External Project [sn_int_common_project]	Stores information of the Jira project such as project ID, the Jira instance of this project, project name, and so on.
External system [sn_int_common_external_system]	Stores information of Jira application used for the integration.
External System Version [sn_int_common_external_system_version]	Stores version information of Jira application used for the integration.
Field Map [sn_int_common_field_map]	Stores the list of field mapping of different issue types for Jira projects.
Jira Board [sn_jira_int_board]	Stores the list of imported boards from Jira.
Jira Import Request [sn_jira_int_import_request]	Stores the list of all import requests created to import projects, boards, and project style mappings from Jira.
Jira Instance [sn_jira_int_instance]	Stores the list of all Jira instances.
Jira Project [sn_jira_int_project]	Stores the list of all imported projects from Jira.
Project Integration Settings [sn_agile_jira_int_import_settings]	Stores the list of one-to-one relation between a Jira project, board, and an Agile assignment group.
Project Style Mapping [sn_jira_int_prj_style_mapping]	Store the list of map configuration templates per Jira project style.
Table Map [sn_int_common_table_map]	Stores the list of table maps for Jira projects.

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Table	Description
Webhook Registry [sn_int_common_webhook_registry]	Stores details of the registry callback path for webhooks registered in Jira to receive event updates.

Setting up the integration between Jira and Agile Development 2.0

Understand the setup process of Atlassian Jira Integration for Agile Development 2.0.

After you have the application installed in your ServiceNow instance, you can proceed to set up the integration, using the sn_jira_int.user role.

The setup process for the integration includes the following tasks:

1. Connect Agile Development 2.0 with Jira.
2. Discover and import available projects and boards from Jira.
3. Enable import and export of issues and import issues in bulk from Jira projects to Agile Development 2.0.
4. Associate Jira projects with assignment groups in Agile Development 2.0.
5. Import sprints from Jira to Agile Development 2.0.
6. Enable a scheduled job to periodically import projects and issues from Jira.
7. Create custom map configurations for tables, fields, and workflow states between Jira and Agile Development 2.0.

Using guided setup to implement integration between Jira and Agile Development 2.0

Guided setup provides a sequence of tasks that help you configure the integration between Agile Development 2.0 and Jira on your ServiceNow instance. To open guided setup, navigate to **All** > **Agile Jira Integration** > **Guided Setup**.

Connecting Agile Development 2.0 to Jira

Establish a connection between Agile Development 2.0 and Jira using a Jira connection alias and a Jira instance.

When you connect Agile Development 2.0 to Jira, a webhook is registered in Jira which receives the following event updates between Jira and Agile Development 2.0.

- Creating or updating projects.
- Creating, updating, or deleting information of epic, story, sprint, and any custom table maps and their fields.

Create a Jira connection alias for integration with Agile Development 2.0

Create a Basic Auth credential and an HTTP(s) connection with a Jira connection alias to establish a connection with Jira.

Before you begin

Roles required:

- admin to create a connection and credential alias
- sn_jira_int.admin or sn_jira_int.user to create basic authorization credentials and HTTP(s) connection

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Procedure

1. Create a Connection & Credential alias
   - You can use the connection alias (sn_jira_int.Jira) that is available by default.
   - You must create a connection alias for every Jira instance that you use.
   - For Jira server (on-prem) users, ensure that the **server_type** and **server_version** connection attributes are present.
2. Create Basic authorization credentials.
   Ensure that the user for whom the basic authorization credentials are created has access to all Jira projects.
3. Create an HTTP(s) connection.

Create a Jira Instance for integration with Agile Development 2.0

Create a Jira instance record using the connection alias that you created to enable the setup of Jira integration with Agile Development 2.0.

Before you begin
Role required: sn_jira_int.admin or sn_jira_int.user

Procedure

1. Navigate to **All** > **Agile Jira Integration** > **Jira Instances**.
2. Click **New**.
3. On the form, fill in the fields.

Jira Instance form

Field	Description
Name	Name of the Jira instance. Enter a name of your choice.
Connection Alias	Jira connection alias that you already created. Use the lookup ( ) option to select your connection alias.
Version	Jira version. Use the lookup ( ) option to select your Jira API version.

4. Click **Submit**.

Connect Agile Development 2.0 to Jira

Connect Jira to Agile Development 2.0 to enable the integration.

Before you begin
Role required: sn_jira_int.user

Procedure

1. Navigate to **All** > **Agile Jira Integration** > **Jira Instances**.
2. Open your Jira instance record.
3. Click **Connect**.

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Result

- If the connection is successful, the **State** field on the Jira Instance record shows Connected. A webhook is now registered in Jira to receive update events.
- If the connection could not be established, the **State** field on the Jira Instance record shows Connection Failed. You can view the reason for the failure in the error message.

What to do next

Discover and import Jira projects and boards

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Discover and import Jira projects and boards

Discover and import all available Jira projects and boards into Agile Development 2.0 to start using the integration between the two applications.

Before you begin

- Connecting Agile Development 2.0 to Jira.
- Role required: sn_jira_int.user

About this task

Procedure

1. Navigate to **All** > **Agile Jira Integration** > **Jira Instances**.
2. Open your Jira instance record.
3. Click **Discover Projects**.

   This action creates requests to import Jira projects, map configuration for all these projects, and Jira Boards. You can view all the import requests in the Jira Import Requests related list and the initial state of all the requests would be **Requested**.

Result

Once the status of each import request changes to **Complete**, you can see that the related lists of this Jira instance are populated as follows:

- Jira Projects: All available projects from Jira
- Jira Boards: All available boards from Jira
- Project Style Mappings: Map configuration for all the imported Jira projects according to the type of your Jira instance as follows:
  - The **classic_on_prem** project template contains the map configurations related to the Jira Server projects.
  - The **classic** project template contains the map configurations related to Jira Cloud Classic projects.
  - The **next-gen** project template contains the map configurations related to Jira Cloud Next-gen projects.

  Once the status of the Create Mappings request changes to **Completed**, you can see the map configuration for each of the imported Jira project under the Mapping Config column of the Jira Projects related list. For more information on the default map configuration of work items, see Default mapping configuration between Agile Development 2.0 and Jira.

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What to do next

Import your issues from Jira to Agile Development 2.0. For more information, see Importing issues and sprints from Jira to Agile Development 2.0.

Default mapping configuration between Agile Development 2.0 and Jira

Understand the default field mapping configuration for work items of a project between Jira and Agile Development 2.0.

Mapping configuration is used to map records in Jira to Agile Development 2.0 for a project. If the table map does not exist for an issue type in your Jira project, the issue cannot be imported and exported between Jira and Agile Development 2.0.

By looking at the default mapping configuration, you can understand how issue types in Jira are mapped to task types in Agile Development 2.0. You can also see how fields are mapped between the two applications. When you import the available issues and sprints of a Jira project, this data is stored in tables as defined in the project's map configuration.

From version 1.1.1 onwards, mapping configuration is generated per project and not at the instance level. You must update any custom maps that you previously configured to ensure that the import and export of work items is not impacted.

Here's how you can view the default map configuration tables of your Jira project.

1. Navigate to **Agile Jira Integration** > **Jira Instances**.
2. Open your Jira instance record.
3. From the Jira Projects related list, open a Jira project.
4. From the Table Maps related list, open the record for Story or Epic.

The following table lists the default field map configuration for a Story and Epic.

Map configuration for Epic

Field in Jira	Field in Agile Development
Epic Name	Short Description
Priority	Priority
Summary	Description
Status	State

Map configuration for Story

Field in Jira	Field in Agile Development 2.0
Status	State
Sprint	Sprint
Description	Description
Priority	Priority
Epic Link	Epic
Summary	Short Description
Assignee	Assigned to

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You can add or update the configuration for field, table, and choice maps of your projects between Jira and Agile Development 2.0 according to your organizational preferences. For details, see Customizing map configuration for your Jira projects.

Importing issues and sprints from Jira to Agile Development 2.0

Understand the process of importing existing issues and sprints from Jira to Agile Development 2.0.

You can import existing issues from Jira projects as stories and epics, and existing sprint data from Jira boards as sprints to Agile Development 2.0. After importing the available data, any updates that you make to the epic, story, or sprint records will be synchronized automatically in both Jira and Agile Development 2.0.

Importing issues

From version 2.0.1, you can proceed to import issues from a Jira project directly after discovering projects from Jira. You do not have to create team integration settings. However, the imported issues are not associated to any assignment group in Agile Development 2.0. You can manually assign these issues to an assignment group later.

If you want your imported issues to be assigned to an assignment group automatically, you can create team integration settings for your Jira project by associating it to an Agile 2.0 assignment group and then proceed to import the issues. This setting ensures that any imported issues that belong to a Jira project are assigned to its associated assignment group.

Importing sprints

Importing sprint data from Jira boards require that the board has team integration settings that associate it to an Agile 2.0 assignment group. Sprint data of a Jira board is imported to its assignment group, only if these sprints have already started in Jira. Also, only the completed and current sprints of Jira are imported.

Team integration settings

From version 2.0.1, the Project Integration Settings module is available as Team Integration Settings. Team integration settings help you associate Jira projects and boards with Agile 2.0 assignment groups to facilitate the bidirectional synchronization of record updates.

Associating a Jira project to an assignment group allows the following:

- Enable import and export of all available stories and epics between this project and its associated group.
- View any new stories and epics or updates made to the existing stories and epics in both Agile Development 2.0 and Jira.

Associating a Jira board to an assignment group allows the following:

- Import all completed and current sprints from this board into the associated group.
- View any completed and current sprints or updates made to them in both Agile Development 2.0 and Jira.

To understand the workflow of the import and export of issues between Agile Development 2.0 and Jira, see Importing and exporting issues between Agile Development 2.0 and Jira.

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Associate a Jira project and board with an assignment group in Agile Development 2.0

Associate your Jira projects and boards with assignment groups in Agile Development 2.0 to enable import and export of all available issues between the associated project and assignment group.

Before you begin

- Discover and import Jira projects and boards.
- Create assignment groups in Agile Development 2.0. See Create an assignment group in Agile Development 2.0.
- Ensure that your Jira project has a defined mapping configuration.
- Role required: sn_jira_int.user

About this task

Create team integration settings to associate a Jira project and Jira board with an Agile 2.0 assignment group.

Important:
You can associate an assignment group with only one project and board from Jira.

Procedure

1. Navigate to **All** > **Agile Jira Integration** > **Team Integration Settings**.
2. Click **New**.
3. On the Team Integration Settings form, select the following:
   - A Jira project
   - A Jira board
   - An assignment group in Agile Development 2.0 to which you want to associate the selected Jira project and board

   Selecting a Jira board in the form is optional. If you do not want to synchronize the sprint data of the board between Agile Development 2.0 and Jira, you can skip selecting a Jira board.

   Note:
   If your Jira project is of Kanban type, you can leave the **Jira board** field empty. All issues of your Kanban project will be mapped to a single Agile 2.0 group.

4. Click **Submit**.

What to do next

You can import or issues from this Jira project or sprints from this Jira board to the associated assignment group.

Related topics

Import issues from a Jira project to Agile Development 2.0

Import sprints from Jira to Agile Development 2.0

Import issues from a Jira project to Agile Development 2.0

Import available issues from a Jira project, with or without the team integration settings for this project, so that you can update existing records of Jira from Agile Development 2.0.

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Before you begin

- Discover and import Jira projects and boards
- Role required: sn_jira_int.user

About this task

If your Jira project has team integration settings, then the imported issues are assigned to an assignment group according to the team integration settings. If your Jira project does not have team integration settings, then the imported issues are not associated to any assignment group.

Note:
This task does not explain importing sprints. For information on how to import sprints from Jira, see Import sprints from Jira to Agile Development 2.0.

Procedure

1. Navigate to **All** > **Agile Jira Integration** > **Jira Instances**.
2. Open your Jira instance record.
3. From the Jira Projects related list, open the project from which you want to import the issues.
4. Enable the import and export of issues by selecting the **Enable Import** and **Enable Export** options as applicable.
   Synchronisation of multi-select fields between Agile and Jira is now supported.
5. Click **Import Issues**.
6. Select a date range from which you want to import the issues from Jira.
7. Click **Submit**.

   An import request of type Import Issues is created in the Jira Import Requests related list. Once the state of this request changes to Completed, you can view all the imported records in the Epics and Stories modules in Agile Development 2.0. The relationship between the stories and epics is retained as it is in Jira.

   Note:
   Existing comments and attachments of issues are not imported from Jira during a bulk import.

Import sprints from Jira to Agile Development 2.0

Import sprints from a Jira board so that you can track progress of these sprints directly in Agile Development 2.0.

Before you begin

- Ensure that the Jira board from which you want to import the sprints has team integration settings. For more information, see Associate a Jira project and board with an assignment group in Agile Development 2.0.
- Role required: sn_jira_int.user

About this task

Import completed and current sprints of Jira board into Agile Development 2.0.

Procedure

1. Navigate to **All** > **Agile Jira Integration** > **Jira Instances**.
2. Open your Jira instance record.

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3. From the Jira Projects related list, open the project that is associated to a Jira board from which you want to import the sprints.
4. Enable the import and export of sprints by selecting the **Enable Import** and **Enable Export** options as applicable.
5. Click **Import Issues**.
6. Select a date range from which you want to import the sprints from Jira.
7. Click **Submit**.

   An import request of type Import Sprints is created in the Jira Import Requests related list. Once the state of this request changes to Completed, you can view all the imported sprint data in the Sprints related list of the associated assignment group in Agile Development.

Schedule a job to auto-import issues from Jira to Agile Development 2.0

Schedule a job to auto-import issues and sprints periodically from Jira into Agile Development 2.0.

Before you begin
Role required: sn_jira_int.user

About this task
After you've configured the scheduled job, it imports issues from all the projects for which you've selected the **Enable import** option.

If you do not configure the scheduled job, you must manually import issues for the discovered projects.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Open the Import Jira Issue job.

   The job is inactive by default.
3. Execute the job manually by clicking **Execute Now**.
4. Set the job to run at a scheduled time by selecting the **Active** check box.
   You can edit the details of the **Run** and **Time** fields according to your preference.
5. Click **Update**.

Customizing map configuration for your Jira projects

Customize the field, table, or workflow state map configuration for your Jira projects. You can customize map configuration of a single project or multiple projects of the same project style.

Note:
Only fields of type number, select, text, and date are supported for custom map configuration.

Customize your table map configuration

Map a Agile Development 2.0 table of your preference for a Jira project.

Before you begin

- Discover and import Jira projects and boards.
- Role required: sn_jira_int.user

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About this task

Create a custom table map of your preference for your Jira project and configure its fields.

If you have a custom table that is applicable to all Jira projects of a specific project type, see Apply custom map configuration to multiple Jira projects.

Procedure

1. Navigate to **All** > **Agile Jira Integration** > **Jira Instances**.
2. Open your Jira instance record.
3. From the Jira Projects related list, open a Jira project for which you want to customize the map configuration.
4. From the Table maps related list of the Jira project, click **New**.
5. On the form, fill in the fields.

Table Map form

Field	Description
Internal Table	Table name in Agile Development 2.0.
Map configuration	Map configuration for this project. This field is auto-populated based on the project.
External Table	Table ID in Jira.
External Table Name	Display name of the table in Jira.

6. Save the table configuration.
7. From the Field Maps related list of your table map record, create new field maps for the following fields:

Field in Jira	Field in Agile Development 2.0
Summary of the issue	Short description
Description of the issue	Description

For information on how to configure field mapping for a table, see Customize your field map configuration. You can also create other field maps for your new table configuration.

What to do next

1. Validate your new table map configuration by clicking **Validate and fix mapping** from your project form.
2. In the Table maps related list of your project, if the Valid column of your configuration shows:
   - true, validation of your map configuration is successful.
   - false, validation of your map configuration failed. Ensure that you enter correct values for all the fields and validate again.
3. Create a business rule to support export of this new table map configuration to Jira. See Create a business rule to apply a custom Agile Development 2.0 table map configuration.

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4. If you want to support import and export of attachments for this new table map, see Allow import and export of attachments on a custom Agile Development 2.0 table.
5. If you want to enable display of fields that reference Jira identifiers in your custom table map, see Populate Jira project identifier reference fields for Agile Development 2.0 custom table.

Customize your field map configuration

Map a field of your preference for a Jira project.

Before you begin

- Discover and import Jira projects and boards.
- Role required: sn_jira_int.user

About this task

If you have a custom field for a Jira project that you want to map with a field in Agile Development 2.0, you can create custom field map configuration that would apply only to this Jira project.

If you have a custom field that is applicable to all Jira projects of a specific project type, see Apply custom map configuration to multiple Jira projects.The following field types are supported for custom field map configuration:

- Number
- Select
- Text
- Date
- Identity
- Date time
- Reference
- List

Procedure

1. Navigate to **All** > **Agile Jira Integration** > **Jira Instances**.
2. Open your Jira instance record.
3. From the Jira Projects related list, open a Jira project for which you want to customize the map configuration.
4. From the Table Maps related list, open the Sprint, Epic, or Story record to add a new field map configuration for that record.
5. From the Field Maps related list, click **New**.
6. On the form, fill in the fields.

Field Map form

Field	Description
Internal Field	Field name in Agile Development 2.0.
Table Map	Table map in Agile Development 2.0, in which this field is created.

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Field	Description
	This field is auto-populated based on the table map record you select.
Internal Table	Table in Agile Development 2.0. This field is auto-populated based on the table map record you select.
External Field	Field ID in Jira.
External Field Name	Display name of the field in Jira. Ensure that this field is added to the Jira project screen.

7. Click **Update**.

What to do next

1. Validate your field map configuration by clicking **Validate and fix mapping** from your project form.
2. From the Table maps related list of your project, navigate to your new field map configuration. If the Valid column of your configuration shows:
   - true, validation of your map configuration is successful.
   - false, validation of your map configuration failed. Ensure that you enter the correct values for all fields and validate again.

> **Important:**
> If your custom map configuration is invalid or if the custom field configured is not added to the default screen scheme of the issue, the export action does not work.

Configuring a reference field in Jira

Understand how to configure a reference field while creating a new field map configuration.

When you select a reference field for the **Internal Field** field, you must select a value for the **Lookup Column Name** field. The value from the **Lookup Column Name** field is used during the import and export of work items between Jira DevOps and Agile Development 2.0.

During import, the integration application searches for the record in the reference table using the **Lookup Column Name** field. If the record is not found, the value in the work item will be empty in Agile Development 2.0.

Customize your workflow state configuration

Create a custom workflow state map of your preference for a Jira project.

Before you begin

- Discover and import Jira projects and boards.
- Role required: sn_jira_int.user

About this task

Map a custom workflow state from Jira to Agile Development 2.0.

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You can map a workflow state in Jira to multiple workflow states in Agile Development 2.0. In such cases, the state in Agile Development 2.0 for an issue type depends on the choice order value that you provide for this state configuration.

For example, the **In Progress** state in Jira is mapped to multiple states such as **Work in progress**, **Ready for testing**, and **Testing** in Agile Development 2.0 using a choice order of 10, 20, and 30.

So, when an **In Progress** issue from Jira is imported, the **State** field in Agile Development 2.0 is set to **Work in progress** as it has the lowest choice order value.

You can also map multiple workflow states in Jira to a single workflow state in Agile Development 2.0.

Procedure

1. Navigate to **All** > **Agile Jira Integration** > **Jira Instances**.
2. Open your Jira instance record.
3. From the Jira Projects related list, open a Jira project for which you want to customize the choice map configuration.
4. Open the workflow state map for this project.
   a. From the Table Maps related list, click **Story**.
   b. From the Field Maps related list, click **Status**.
5. From the Choice Maps related list, click **New**.
6. On the form, fill in the fields.

Choice Map form

Field	Description
Internal Choice	Value of the workflow state in Agile Development 2.0. This value is an integer.
External Choice	ID of the workflow transition in Jira. **Note:** In case there is no transition, insert the ID of the workflow state.
External Choice Name	Display name of the workflow transition in Jira. **Note:** In case there is no transition, insert the display name of the workflow state.

7. Click **Update**.

What to do next

1. Validate your choice map configuration by clicking **Validate and fix mapping** from your project form.
2. From the Table maps related list of your project, navigate to your new choice map configuration. If the Valid column for your configuration shows:

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- true, validation of your map configuration is successful.
- false, validation of your map configuration failed. Ensure that you enter correct values for all fields and validate again.

Apply custom map configuration to multiple Jira projects

Add a custom table or field, which is applicable to all your Jira projects of a specific type, to the map configuration template in Agile Development 2.0.

Before you begin

- Discover and import Jira projects and boards.
- Role required: sn_jira_int.user

Procedure

1. Navigate to **All** > **Agile Jira Integration** > **Jira Instances**.
2. Open your Jira instance record.
3. From the Project Style Mappings related list, select the project template to which you want to add the custom field.
   For example, if the field that you want to add is applicable to all Jira projects of the type Classic, then select **classic**.
4. Add the custom table or field from Agile Development 2.0 to the existing map configuration in the **Default Mapping** field.
   You can copy the contents of the **Default Mapping** field into a JSON viewer to view the contents in a format of your preference. For example, as shown in the following figures, you can add a new table for Defect [rm_defect] to map the Bug table from Jira or a new field in the existing Story [rm_story] table to map story points.

Custom table map for Defects

```
    }
},


"rm_defect": {
  "name": "Bug",
  "fields": {
    "short_description": {
      "name": "Summary"
    }
  }
},


"rm_epic": {
```

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Custom field map for Story Points

```
{
  "rm_story": {
    "name": "Story",
    "fields": {
      "short_description": {
        "name": "Summary"
      },

      "story_points": {
        "name": "Story Points"
      },

      "description": {
        "name": "Description"
      },
      "epic": {
        "name": "Epic Link"
      },
```

Custom field for story points

Custom field map for Multi-select fields

```
{
  "rm_story" : {
    "name" : "Story",
    "fields" : {
      "short_description" : {
        "name" : "Summary"
      },
      "business_units" : {
        "name" : "BusinessChoices",
        "id" : "customfield_10062",
        "lookup_table_name" : "business_unit",
        "lookup_column_name" : "name"
      },
      "description" : {
        "name" : "Description"
      },
      "epic" : {
        "name" : "Epic Link"
      },
      "state" : {
        "name" : "Status",
```

If you're adding a new field, ensure that the custom field configured is added to the default screen scheme of the issue.

5. Click **Update**.

What to do next

Apply the custom project style map to all its related Jira projects.

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1. Delete the existing map configuration of all the imported Jira projects.

   You can delete the map configuration of a project by making its **Mapping Config** field empty.

   Tip:
   From the Jira Projects related list, make a multiple select on the **Mapping Config** field of all the Jira project records and remove their value, making all these fields empty.

2. If you've created a new table map, create a business rule to apply this new table map configuration. See Create a business rule to apply a custom Agile Development 2.0 table map configuration.
3. Import these projects from Jira by clicking **Discover Projects**.

   This would import all the Jira projects with their map configuration as per the customized project style map.

Create a business rule to apply a custom Agile Development 2.0 table map configuration

Create a business rule to enable export from your new custom Agile Development 2.0 table map configuration to your Jira projects.

Before you begin
Role required: admin or sn_jira_int.admin

About this task
After you create a custom table map for a single or multiple Jira projects, create a business rule similar to Synch Story with Jira to support export of information from this new table map from Agile Development 2.0 to Jira.

Procedure
1. Navigate to **All** > **System Definition** > **Business Rules**.
2. From the list of available business rules, locate and open the Synch Story with Jira rule.
3. From the context menu (☰), perform an Insert and Stay operation on this business rule.
   If you have not enabled the **Insert and Stay** action in your ServiceNow instance, see Allow insert options on records.
4. On the business rule form, edit the following fields.

Business rule form

Field	Description
Name	Unique name for the business rule. For example, if your new table map is to map defects, name this rule as Sync Defect with Jira.
Table	Select the Agile Development 2.0 table for which you've created the custom map. For example, Defect [rm_defect].

5. Click **Update**.

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Allow import and export of attachments on a custom Agile Development 2.0 table

Enable import and export of attachments between Jira and Agile Development 2.0 for a custom Agile 2.0 table that you added to the map configuration.

Before you begin
Role required: admin or sn_jira_int.admin

Procedure

1. Navigate to **All** > **System Definitions** > **Business Rules**.
2. From the list of business rules, locate and open the Sync Attachment to Jira rule.
3. In the When to run section of the form, include your custom table map by adding it to the filter conditions.
   For example, if the custom table that you added is Defect, do the following:
   a. Click **Add "OR" Clause**.
   b. Set the new clause to **Table name is rm_defect**.
4. Click **Update**.

Populate Jira project identifier reference fields for Agile Development 2.0 custom table

Enable Jira identifier reference fields for your Agile Development 2.0 custom table that you added to the map configuration.

Before you begin
Role required: admin or sn_jira_int.admin

About this task
You can display references of ID, key, Jira project, and the project URL on your custom table form by adding this table to the Populate External Identifier Reference business rule.

Procedure

1. Navigate to **All** > **System Definitions** > **Business Rules**.
2. From the list of business rules, locate and open the Populate External Identifier Reference rule.
3. In the When to run section of the form, include your custom table map by adding it to the filter conditions.
   For example, if the custom table that you added is Defect, do the following:
   a. Click **Add "OR" Clause**.
   b. Set the new clause to **Reference table is rm_defect**.
4. Click **Update**.

What to do next
Configure the form layout or personalize the list layout of your custom table to display any or all of the following fields.

- External ID
- External Key
- External Project
- External URL

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Related topics

Personalise a v2 list

Configuring the form layout

Reset mapping configuration of Jira projects

Reset the existing mapping configuration for multiple Jira projects to a default mapping configuration.

Before you begin

- Discover and import Jira projects and boards
- Role required: sn_jira_int.user

About this task

Apply a default mapping configuration to all or a few Jira projects. Any existing custom mapping configuration for these projects will be deleted after you reset the mappings.

If you've cleared the **Mapping Config** field or deleted the existing table maps for this project, resetting the mappings for this project will restore the mapping configuration to the default configuration.

Procedure

1. Navigate to **All** > **Agile Jira Integration** > **Jira Instances**.
2. Open your Jira instance record.
3. Reset the mappings of multiple Jira projects using one of the following ways.

Result

The mapping configuration of the projects is updated to as per the **Default Mapping** field in the Project Style Mappings form that the selected projects belong to.

Importing and exporting issues between Agile Development 2.0 and Jira

Understand the workflow for the import and export of issues between Agile Development 2.0 and Jira.

To export and import issues between Agile Development 2.0 and Jira, you must complete the team integration settings for your Jira projects.

Importing to Agile Development 2.0 from Jira

- When you create an issue of type epic in a Jira project, an epic is created for the assignment group according to the team integration settings that you configured.
- When you create an issue of type story in a Jira project, a story is created for the assignment group according to the team integration settings that you configured.
  - The relationship between the story and its epic is retained as it is in Jira.
  - The **Assigned To** field in the story displays the user from Jira, only if a user with the same email address is found in Agile Development 2.0.
- Only the fields that are defined in the field map are retained in the story or epic. For details of the default mapping configuration, see Default mapping configuration between Agile Development 2.0 and Jira.

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- When you add an attachment to an issue in Jira, the same attachment is added to the corresponding story or epic in Agile Development 2.0.
- When you add comments for an issue in Jira, they are updated in the **Work notes** field of the story or epic in Agile Development 2.0, based on the map configuration.

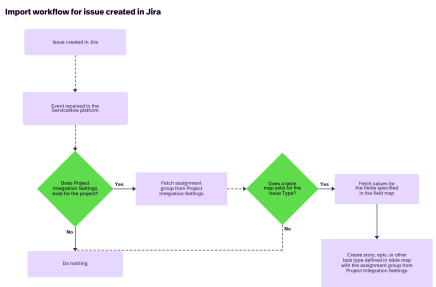
> **Note:**
> The images added in the comments appear as attachments.

- When you delete an issue in Jira, the corresponding record is deleted in Agile Development 2.0.

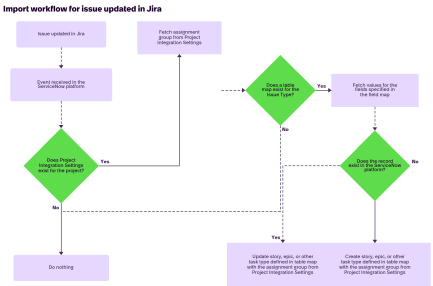
> **Note:**
> To delete records in Agile Development 2.0, set the **Can Delete** field to **true** in the Application access of the respective tables. For details, see Table design and runtime settings.

- When you start a sprint in Jira, a sprint is created for the assignment group in Agile Development 2.0, if the Jira board is configured in the team integration settings.

Import workflow for issue created in Jira



Import workflow for issue updated in Jira



Exporting from Agile Development to Jira

- When you create an epic for an assignment group, it is exported to the project in Jira according to the team integration settings that you configured.
- When you create a story for an assignment group, it is exported to the project in Jira according to the team integration settings that you configured.
  - The relationship between the story and its epic is retained in Jira.
  - Updates to the **Assigned To** field in the ServiceNow platform is exported to Jira.
- When you add an attachment to a story or an epic, the same attachment is added to the corresponding issue in Jira.
- When you add work notes to a story or an epic, they are updated in the corresponding issue in Jira as comments.
- When you update the assignment group of an existing story in Agile Development 2.0, the issue is recreated in the Jira project that is associated with the updated assignment group.

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- When you create a sprint for an assignment group in Agile Development 2.0, it is exported to Jira only if you configured the Jira board in the team integration settings.

Note:
If your Jira instance has state transition rules, the export sync from Agile Development 2.0 to Jira might fail. For example, if a transition rule in Jira restricts a story or work item from moving directly to a **Complete** state without first passing through an **In Progress** state, and the story is marked **Complete** without that intermediate step, the sync fails.

Troubleshooting issues of Jira integration with Agile Development 2.0

Resolve common issues that you might face while working with the integration of Jira and Agile Development 2.0.

Issue	Action
The export action is not working.	• Review your custom map configuration. If your custom map configuration is invalid or if the custom field configured is not added to the default screen scheme of the issue, export does not work. • Ensure that the **Enable Export** check box is selected in the project integration settings for this Jira project or board. • Check if your Jira password has expired.
The sprint is not associated to the imported stories.	Verify if the sprint is started in Jira. If the sprint that is associated with the stories is a future sprint, then it is not associated to the stories in Agile Development. Sprint data from Jira is updated in Agile Development only if the sprint is active in Jira.
The sprint is not imported into Agile Development 2.0.	• Ensure that your sprint in Jira has dates. • Ensure that the dates of a sprint in Jira does not overlap with another sprint in the same assignment group in Agile Development 2.0.
A value from a field in Jira is not populated in Agile Development 2.0.	Verify if the custom field map is configured.
The value of **Priority** or **State** fields from Jira is not populated in Agile Development 2.0.	Verify if the custom workflow state map is configured.
An update by a user in Jira is not updated in Agile Development 2.0.	Ensure that the user credentials that are used to set up the integration of Jira with Agile

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Issue	Action
	Development are not used to perform record updates.
The issue is deleted in Jira and not deleted in Agile Development 2.0.	Ensure that the **Can Delete** field in the Application access of the respective tables is set to true.
For Jira cloud users, when you import, you see duplicate comments.	Verify the cyclic payload. Ensure that the privacy settings should be enabled for the connection user (used in http connection in Agile Development 2.0) to make the Email address visible in webhook events.
Deleting a project or board in Jira does not result in any action in Agile Development 2.0.	After deleting the project or board in Jira, the Jira administrator must manually delete the associated stories in the Agile Development 2.0.
Using rich text in Jira results in garbled text in Agile Development 2.0.	The wiki text format that is used in Jira is not supported.
For a Next-gen Jira project, when a story is created for an epic in Jira, the relation between story and epic is not imported to Agile Development 2.0.	In Jira, make a nominal update to the story which would send the epic relation along with this update to the Agile Development 2.0.
Sub tasks information is neither imported nor exported between Jira and Agile Development 2.0.	To enable import of sub tasks from Jira to Agile Development 2.0, you must manually configure custom mapping for this task type. For more information, see Customize your table map configuration.
For a Next-gen Jira project, scrum tasks are not exported from Agile Development 2.0 to Jira.	The application supports only the import of sub tasks from Jira to the Agile Development 2.0 but not the export of these tasks to Jira.
After discovering and importing projects, map configuration is not generated for a project.	Ensure that the user for whom the connection alias is created has access to all Jira projects.
The UI actions for Connect, Disconnect, and Validate and Fix result in an error when using for the first time.	This is a known issue. Retry the UI action.
While fetching Jira project metadata, the API call fails in the Flow designer, with a **API response size exceeded** error.	Reduce the value of the batch size property by setting it to any value between 1 and 50. For more information, see Define batch size for Jira project metadata.
Import Issues are staying in 'Processing' state forever.	Import requests are stuck because Reset mapping in't working as server type, as it was incorrectly set as 'cloud' instead of 'server'. Few customers will not setup connection attributes, and therefore 'server type' and 'server verions' are defaulted to 'cloud' and '8' respectively. Set guidelines for Jira on-

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Issue	Action
	prem customers to use proper connection attributes.
Bulk importing of work items data fails with a **API response size exceeded** error.	Reduce the value of *MAX_LIMIT* in the JiraConstants Script Include and then try to bulk import the work items data again.

Enabling detailed project logs

To view all the details on project logging, enable the integration project logging property. For more information, see Enable detailed project logging in Jira Integration with Agile Development.

Enable detailed project logging in Jira Integration with Agile Development

Understand how to enable integration project logging in Jira so that you can view details of the project logs.

Before you begin

Role required: sn_jira_int.admin (with edit access) or sn_jira_int.user (with read access).

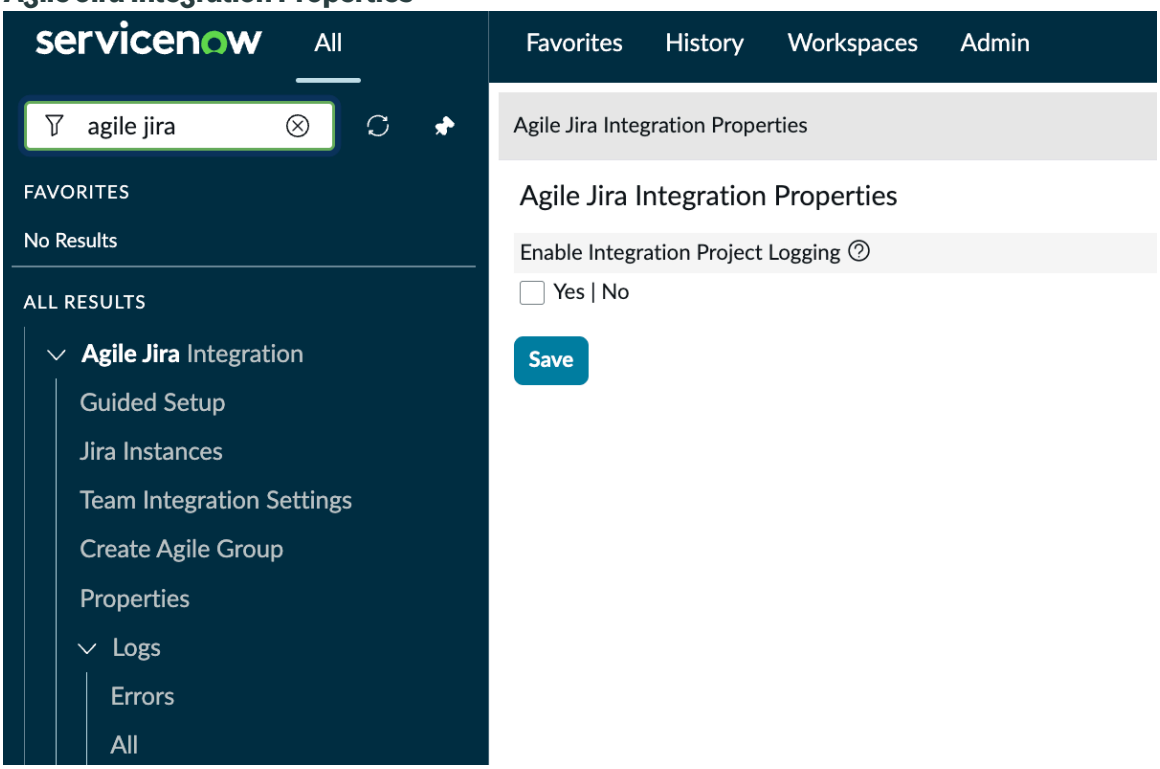
About this task

Enable the project logging property in the Agile Jira Integration application.

Procedure

1. Navigate to **All** > **Agile Jira Integration** > **Properties**.
2. Click the **Enable Integration Project Logging** check box.

Agile Jira Integration Properties



3. Click **Save**.

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Define batch size for Jira project metadata

Define a batch size value that is used to fetch the metadata from the Jira projects.

Before you begin
Role required: sn_jira_int.admin (with edit access) or sn_jira_int.user (with read access).

About this task
Reduce the value of the batch size property to resolve the **API response size exceeded** error that you might get while fetching Jira project metadata.

Procedure

1. Navigate to **All** > **Agile Jira Integration** > **Properties**.
2. Modify the **Define the batch size for fetching Jira project metadata** field value to a value less than 50.
   The suggested value range is 5–50.
3. Click **Save**.

Microsoft Azure DevOps Integration for Agile Development

Enable bidirectional synchronization of work items between Microsoft Azure DevOps and ServiceNow® Agile Development 2.0 by integrating the two applications.

For example, if you update a record in Microsoft Azure DevOps, the update is reflected in Agile Development 2.0. Similarly, if you update a record in Agile Development 2.0, the update is reflected in Microsoft Azure DevOps.

The Integration of Microsoft Azure DevOps with Agile Development enables you to do the following:

- View available Microsoft Azure DevOps projects in Agile Development.
- Perform a bulk import of records from Microsoft Azure DevOps to Agile Development 2.0.
- Perform single record updates between Microsoft Azure DevOps and Agile Development 2.0.
- Avoid duplicating record update entries in Microsoft Azure DevOps and Agile Development 2.0.
- Plan, track, and update your tasks from a single application.

Starting with version 1.3, Microsoft Azure DevOps Integration for Agile Development supports process-level map configuration enabling you to configure multiple processes to be synchronized with Agile Development 2.0.

Request apps on the Store

Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Install Microsoft Azure DevOps Integration for Agile Development

Install the Microsoft Azure DevOps Integration for Agile Development (sn_agile_ado_int) application version 1.3 from the ServiceNow Store.

Before you begin
Complete the following setup checklist for a smooth installation and configuration.

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1. Verify that the Agile Development 2.0 plugin (com.snc.sdlc.agile.2.0) is activated.
2. Verify that the ServiceNow IntegrationHub Standard Pack Installer plugin (com.glide.hub.integrations.standard) is activated.
3. Verify that the Azure DevOps Boards Spoke 1.6.1 plugin (sn_azure_dev_spoke) is activated.

Tip:
Navigate to **Subscription Management** > **Subscriptions**. The list displays the subscriptions that your organization has purchased.

Role required: admin

Note:
Activation of the Agile Development 2.0, ServiceNow IntegrationHub Standard Pack Installer, and Azure DevOps Board Spoke plugins on production instances may require separate licenses. Contact ServiceNow Customer Support for details.

Procedure

1. Navigate to ServiceNow Store.
2. In the ServiceNow Store, search for Microsoft Azure DevOps Integration for Agile Development.
3. Click the application tile.
   You can view detailed information about the application.

   Note:
   Consider reading the Other Requirements and Dependencies sections, as applicable.

4. Click **Get** and enter your Now Support login credentials.
5. Click **Request Install**.
6. In the **Instance Name** field, enter your details and click **Validate Instance**.
7. In the **Reason for the Instance** field, enter your details and click **Request**.
   You receive an email with detailed installation instructions.
8. Log in to the instance on which you want to install the Microsoft Azure DevOps Integration for Agile Development application.
9. Select **System Applications** > **Applications**.
10. Locate the application, select it, and click **Install**.

Result

The following components are installed with the installation of the application:

- Roles
- Scheduled Jobs
- Tables

For more information, see Components installed with Microsoft Azure DevOps integration for Agile Development.

Components installed with Microsoft Azure DevOps integration for Agile Development

Several types of components are installed with activation of the Microsoft Azure DevOps integration for Agile Development application, including user roles, scheduled jobs, and tables.

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Note:
The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Roles installed

Role title [name]	Description	Contains roles
Azure DevOps integration admin [sn_ado_int.admin]	Has complete access to the application	• sn_int_common.admin • sn_ado_int.user
Azure DevOps integration user [sn_ado_int.user]	• Sets up integration between Azure DevOps and Agile Development • Can create new or update the existing map configurations between Azure DevOps and Agile Development	• connection_admin • sn_int_common.user • credential_admin

Scheduled jobs installed

Scheduled job	Description
Discover Azure Project Job	Discovers new Azure DevOps projects at a scheduled time and imports them automatically.
Import Azure DevOps Teams Areas and Iterations	Imports teams, areas, and iterations from Azure DevOps automatically at a scheduled time.
Import Azure DevOps Work Items	Imports work items from Azure DevOps automatically at a scheduled time.

All the scheduled jobs are inactive by default. For more information, see Schedule jobs to import projects, teams, areas, and work items from Azure DevOps.

Tables installed

Table	Description
Area Team M2M [sn_ado_int_m2m_area_team]	Stores the relationship between teams and areas.
Attachment Map [sn_int_common_attachment_map]	Stores the mapping of attachments to issues between Azure DevOps and Agile Development.
Azure DevOps Area [sn_ado_int_area]	Stores the list of imported areas from Azure DevOps.

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Table	Description
Azure DevOps Import Request [sn_ado_int_import_request]	Stores the list of all import requests created to import projects and process mappings from Azure DevOps.
Azure DevOps Instance [sn_ado_int_instance]	Stores the list of all Azure DevOps instances.
Azure DevOps Iteration [sn_ado_int_iteration]	Stores the list of imported iterations from Azure DevOps.
Azure DevOps project [sn_ado_int_project]	Stores the list of imported projects from Azure DevOps.
Azure DevOps Subscriptions [sn_ado_int_subscription]	Stores the subscription IDs of the event type for the webhooks registered in Azure.
Azure DevOps Team [sn_ado_int_team]	Stores the list of imported Azure DevOps teams.
Choice Map [sn_int_common_choice_map]	Stores the list of workflow state mapping for Azure DevOps projects.
Event Type [sn_int_common_input_event_type]	Stores information of the type of webhook events such as creating, updating, or deleting a work item.
External Identifiers [sn_int_common_external_identifiers]	Stores the list of all Azure DevOps reference identifiers such as External ID, External Key, External Project, External URL, and so on.
External Project [sn_int_common_project]	Stores information of the Azure DevOps project such as project ID, the Azure DevOps instance of this project, project name, and so on.
External System [sn_int_common_external_system]	Stores information of the Azure DevOps application used for the integration.
External System Version [sn_int_common_external_system_version]	Stores the API version information of the Azure DevOps application used for the integration.
Field Map [sn_int_common_field_map]	Stores the list of field mapping of different work items for Azure DevOps projects.
Process Mapping [sn_ado_int_process_mapping]	Stores the list of map configuration templates per Azure DevOps process.
Table Map	Stores the list of table maps for Azure DevOps projects.

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Table	Description
[sn_int_common_table_map]	
Team Integration Settings [sn_agile_ado_int_import_settings]	Stores the list of one-to-one relation between Azure DevOps project, team, and an Agile assignment group.
Webhook Registry [sn_int_common_webhook_registry]	Stores details of the registry callback path for webhooks registered in Azure DevOps to receive event updates.

Setting up the integration between Microsoft Azure DevOps and Agile Development 2.0

Understand the setup process of Microsoft Azure DevOps Integration for Agile Development 2.0.

After you have the application installed in your ServiceNow instance, you can proceed to set up the integration, using the sn_ado_int.user role.

The setup process for the integration includes the following tasks:

1. Connect Agile Development 2.0 with Azure DevOps.
2. Discover and import available projects from Azure DevOps.
3. Import area, teams, and iterations into Agile Development 2.0 from Azure DevOps.
4. Set up the import and export between Agile Development 2.0 and Azure DevOps.
   a. Register webhooks for an Azure DevOps project.
   b. Associate Azure DevOps projects with assignment groups in Agile Development 2.0.
5. Bulk import work items and iterations into Agile Development 2.0. Enable a scheduled job to auto-import issues from Azure DevOps.
6. Create custom map configurations for tables, fields, and workflow states between Azure DevOps and Agile Development 2.0.

Connecting Agile Development 2.0 and Azure DevOps

Establish a connection between Agile Development 2.0 and Azure DevOps using a connection alias and an Azure DevOps instance.

Create an Azure DevOps connection alias

Create a Basic Auth credential and an HTTP(s) connection which will together be used as a connection alias to establish a connection with Azure DevOps.

Before you begin

Roles required:

- admin to create a connection and credential alias
- sn_ado_int.admin or sn_ado_int.user to create basic authorization credentials and HTTP(s) connection

Procedure

1. Create a Connection & Credential alias
   - A connection alias (sn_ado_int.Azure_DevOps) is available by default.
   - You must create a connection alias for every Azure DevOps organization that you use.
2. Use OAuth 2.0 or Basic Auth to create credentials.

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- OAuth 2.0: See Set up the Microsoft Azure DevOps Boards Spoke using OAuth.

  Important:
  Make sure to specify a username in the OAuth 2.0 Credentials [oauth_2_0_credentials] table for the Credential Alias record. This username must correspond to the service account used to interact with Azure DevOps.

- Basic Authentication: See Basic authentication credentials.

  Note:
  When creating Basic Auth credentials, use the details of your personal access token in Azure DevOps.

  - Set the **Password** field of the basic authentication credential as the personal access token in Azure DevOps.
  - Set the **User Name** field of the basic authentication credential as the username used to create the personal access token in Azure DevOps.

    If your login is in the format of *domainname* | *username*, use only the *username*.

3. Create Create an HTTP(s) connection.

What to do next
Create an Azure DevOps instance

.

Create an Azure DevOps instance

Create an Azure DevOps instance record using the connection alias that you created. This instance is used to establish an integration between Agile Development 2.0 and Azure DevOps.

Before you begin
Role required: sn_ado_int.admin or sn_ado_int.user

Procedure

1. Navigate to **All** > **Agile Azure DevOps Integration** > **Azure DevOps Instances**.
2. Click **New**.
3. On the form, fill in the fields.

Azure DevOps Instance form

Field	Description
Name	Name of the Azure DevOps instance. Enter a name of your choice.
Connection Alias	Azure DevOps connection alias that you already created. Use the lookup ( ) option to select your connection alias.
Version	Azure DevOps version. Use the lookup ( ) option to select your Azure DevOps version.

4. Click **Submit**.

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What to do next
Connect to Azure DevOps

.

Connect to Azure DevOps

Connect Azure DevOps with Agile Development 2.0 to enable the integration.

Before you begin
Role required: sn_ado_int.user

Procedure

1. Navigate to **All** > **Agile Azure DevOps Integration** > **Azure DevOps Instances**.
2. Open your Azure DevOps instance record.
3. Click **Connect**.

Result
If the **State** field on the Azure DevOps Instance record shows:

- **Connected**, the connection is successful.
- **Not connected**, the connection could not be established. You can view the reason for the failure in the error message.

What to do next
Discover and import Azure DevOps projects

.

Discover and import Azure DevOps projects

Discover and import all available Azure DevOps projects into Agile Development 2.0 to start using the integration between the two applications.

Before you begin

- Complete connecting Agile Development and Azure DevOps.
- Role required: sn_ado_int.user

Procedure

1. Navigate to **All** > **Agile Azure DevOps Integration** > **Azure DevOps Instances**.
2. Open your Azure DevOps instance record.
3. Click **Discover Projects**.

   This action creates requests to import Azure DevOps projects and process map configuration for all these projects. You can view all import requests in the Azure DevOps Import Requests related list. The initial state of these requests is **Requested**.

Result
Once the status of each import request changes to **Complete**, you can see that the related lists of this Azure DevOps instance are populated as follows:

- Azure DevOps Projects: All available projects from Azure DevOps
- Process Mappings: Map configuration for all the imported Azure DevOps projects according to the process type.

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For example, default process types such as Agile, Basic, and CMMI or any custom process types that you defined for your Azure DevOps projects.

For more information on the default map configuration of work items, see Default map configuration for Azure DevOps integration with Agile Development 2.0.

What to do next

Import areas, teams, and iterations from Azure DevOps

.

Default map configuration for Azure DevOps integration with Agile Development 2.0

Understand the default field map configuration, of different process types, between Azure DevOps and Agile Development 2.0.

By looking at the default map configuration for different process types, you can see how work item types in Azure DevOps are mapped in Agile Development. You can also see how fields are mapped between the two applications.

When you import available epics, stories, and issues from Azure DevOps, this data is stored in tables as defined in the process map configuration.

Note:

When you upgrade to version 1.3 of the application, map configuration is generated at the process level per process type and not at the instance level. You must update any custom maps that you previously configured to ensure that the import and export of work items is not impacted.

Here's how you can view the default map configuration for different process types.

1. Navigate to **Agile Azure DevOps Integration** > **Azure DevOps Instances**.
2. Open your Azure DevOps instance record.
3. From the Process Mappings related list, open the record for a process map.

You can add or update the configuration for field, table, and choice maps between Azure DevOps and Agile Development 2.0. For details, see Customizing your map configuration for Azure DevOps integration.

Import areas, teams, and iterations from Azure DevOps

Import areas, teams, and iterations of your Azure DevOps projects. These details are used to import sprint data and associate your Azure DevOps projects with assignment groups in Agile Development 2.0.

Before you begin

- Discover and import Azure DevOps projects.
- Role required: sn_ado_int.user

Procedure

1. Navigate to **All** > **Agile Azure DevOps Integration** > **Azure DevOps Instances**.
2. Open your Azure DevOps instance record.
3. From the Azure DevOps Projects releated list, open a project record.

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4. Click **Import Areas, Iterations and Teams**.

   Details of your import requests are available in the Azure DevOps Import Requests related list.

   You can view all the imported teams, iterations, and areas in the Azure DevOps Teams, Azure DevOps Iterations, and Azure DevOps Areas related lists of this project.

What to do next

Setting up import and export between Azure DevOps and Agile Development 2.0

.

Setting up import and export between Azure DevOps and Agile Development 2.0

Configure the settings for the import and export actions of work items between Agile Development 2.0 and Azure DevOps.

To enable synchronization of work items, register webhooks for your Azure DevOps projects and associate your Azure DevOps projects and teams with assignment groups in Agile Development 2.0.

Register webhooks for an Azure DevOps project

Register webhooks to subscribe to the events from your Azure DevOps projects to Agile Development 2.0.

Before you begin

- Discover and import Azure DevOps projects.
- Role required: sn_ado_int.user

Procedure

1. Navigate to **All** > **Agile Azure DevOps Integration** > **Azure DevOps Instances**.
2. Open your Azure DevOps instance record.
3. From Azure DevOps Projects related list, open your project record.
4. Click **Register Webhooks**.
   If the webhook registration is successful, the **State** field in the project form changes from **Not Registered** to **Registered**.

Result

When you register webhooks in Azure DevOps,it receives the following event updates between Azure DevOps and Agile Development 2.0.

- Create a work item
- Update a work item
- Delete a work item
- Restore a work item
- Comment on a work item

For more information on synchronization of work items according to these webhook events, see Importing and exporting work items between Agile Development and Azure DevOps.

What to do next

Associate Azure DevOps projects with assignment groups in Agile Development 2.0

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Associate Azure DevOps projects with assignment groups in Agile Development 2.0

Associate your Azure DevOps projects and teams with assignment groups in Agile Development 2.0 to enable import and export of issues between the two applications.

Before you begin

- Import areas, teams, and iterations from Azure DevOps.
- Create assignment groups in Agile Development. See Create an assignment group in Agile Development 2.0.
- Role required: sn_ado_int.user

About this task

After you associate an Azure DevOps team with an assignment group, you can:

- Import all available stories and epics of this team into the associated group.
- View any new stories and epics or updates made to the existing stories and epics in both Agile Development 2.0 and Azure DevOps.
- Import iterations as sprints in Agile Development 2.0.

Procedure

1. Navigate to **All** > **Agile Azure DevOps Integration** > **Team Integration Settings**.
2. Click **New**.
3. In the Team Integration Settings form, select:
   - An Azure DevOps project.
   - A team of your Azure DevOps project.
   - An assignment group in Agile Development 2.0 with which you want to associate the selected Azure DevOps team.

   The value of the **Default Area** field is filled automatically depending on the selected team.

   Note:
   If a **Default Area** value is already used for a Team Integration Settings record, then it cannot be used for another Team Integration Settings record because Backlog in Agile Development 2.0 can't be shared among multiple assignment groups.

   Stories or epics that don't have an Assignment group in Agile Development 2.0 will not be synced with Azure DevOps. This is because values from the Team Integration Setting record are used determine which ADO project a story or epic in Agile Development 2.0 belongs to.
4. Click **Submit**.
   You can view the details of your settings in the Team Integration Settings in the Azure DevOps Project form.

   Note:
   You can associate an assignment group with only one Azure DevOps team.

What to do next

Import work items from Azure DevOps to Agile Development 2.0

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Related topics

Importing and exporting work items between Agile Development and Azure DevOps

Import work items from Azure DevOps to Agile Development 2.0

Import work items and iterations of an Azure DevOps project into Agile Development to track and update the status of your work.

Before you begin

- Set up team integration settings for your Azure DevOps projects. For more information, see Associate Azure DevOps projects with assignment groups in Agile Development 2.0.
- Role required: sn_ado_int.user

Procedure

1. Navigate to **All** > **Agile Azure DevOps Integration** > **Azure DevOps Instances**.
2. Open your Azure DevOps instance record.
3. From the Azure DevOps Projects related list, open a project record.
4. Enable import and export of work items by selecting the **Enable Workitems Import** and **Enable Workitems Export** options.
5. Enable synchronization of sprint data by selecting the **Sync Sprints** option.
6. Click **Import Work Items**.
7. Select a date and time range.
8. Click **Submit**.

Note:
The bulk import action doesn't import the **Description** and **Acceptance criteria** fields. However, if there's an update on these records in Azure DevOps after the import is done, these fields are synced in Agile through webhook events.

Details of your import requests are available in the Azure DevOps Import Requests related list.

You can view all the imported work items and sprints in the Agile Development application.

- The relationship between the stories and epics stays as it is in Azure DevOps.

  The **Assigned to** field of the story is set to the user based on the user's email address, which must be unique per user account.

- The mapping of states of an iteration in Azure DevOps to sprints in Agile Development is as follows:

State in Azure DevOps	State in Agile Development 2.0
Past	Completed
Future	Draft
Current	Current

- Sprints are not created in Agile Development 2.0 for the following conditions:

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    - If the date fields of the iteration in Azure DevOps are empty.
    - If the iteration has a child iteration associated to it.
    - If the sprints have overlapping dates.
  - If two or more teams share a backlog iteration in Azure DevOps, a separate sprint record for each team is created in Agile Development 2.0.

What to do next

Schedule jobs to import projects, teams, areas, and work items from Azure DevOps

.

Schedule jobs to import projects, teams, areas, and work items from Azure DevOps

Schedule jobs to automatically import new projects, teams, areas, work items, and sprints periodically from Azure DevOps into Agile Development 2.0.

Before you begin

Role required: admin

About this task

If you do not configure the scheduled job, you must manually discover projects and import areas and teams.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Open one of the following jobs:
   - Discover Azure Project Job
   - Import Azure DevOps Teams Areas and Iterations
   - Import Azure DevOps Work Items

   These jobs are inactive by default.
3. To execute the job manually, click **Execute Now**.
4. To run the job at a scheduled time, select the Active check box.
   You can edit the details of the **Run** and **Time** fields according to your preference.
5. Click **Update**.
6. Repeat the procedure for the other two scheduled jobs.

Customizing your map configuration for Azure DevOps integration

Customize the table, field, or state map configuration between Azure DevOps and Agile Development 2.0 according to your organizational preferences.

- Any modifications that you do to the existing map configuration of the process types would apply to all the Azure DevOps projects that use this process map.
- Only fields of type number, select, text, date, identity, date, date time, and reference are supported for custom map configuration.

Customize your table map configuration

Configure table maps between tasks, iterations, and work areas of Azure DevOps and tables in Agile Development 2.0 and configure its fields for Azure DevOps projects of a process type.

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Before you begin

- Discover and import Azure DevOps projects.
- Role required: sn_ado_int.user

Procedure

1. Navigate to **All** > **Agile Azure DevOps Integration** > **Azure DevOps Instances**.
2. Open your Azure DevOps instance record.
3. From the Process Mapping related list, open a process map for which you want to customize the map configuration.
4. From the Table maps related list, click **New**.
5. On the form, fill in the fields.

Table Map form

Field	Description
Internal Table	Name of the table in Agile Development 2.0.
External Table	Table ID in Azure DevOps.
External Table Name	Display name of the table in Azure DevOps.

6. Save the table configuration.
7. From the Field Maps related list of your table map record, create new field maps to map the following fields.

Field in Azure DevOps	Field in Agile Development
Title of the work item	Short description

For information on how to configure field mapping for a table, see Customize your field map configuration. You can also create other field maps for your new table configuration.

What to do next

1. Validate your new table map configuration by clicking **Validate and fix mapping** from your process map form.
2. In the Table maps related list, if the Valid column of your configuration shows:
   - true, validation of your map configuration is successful.
   - false, validation of your map configuration failed. Ensure that you enter correct values for all fields and validate again.
3. Create a business rule to support export of this new table map configuration to Azure DevOps. For more information, see Create a business rule to apply a custom table map configuration.

Customize your field map configuration

Create a custom field map configuration to map a field in an Agile Development 2.0 table for Azure DevOps projects of a process type.

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Before you begin

- Discover and import Azure DevOps projects.
- Role required: sn_ado_int.user

About this task

The following field types are supported for custom field map configuration:

- Number
- Select
- Text
- Date
- Identity
- Date time
- Reference
- List

Procedure

1. Navigate to **All** > **Agile Azure DevOps Integration** > **Azure DevOps Instances**.
2. Open your Azure DevOps instance record.
3. From the Process Mapping related list, open a process map for which you want to customize the map configuration.
4. From the Table maps related list, open a record to create a field map configuration for that table map.
5. From the Field Maps relates list, click **New**.
6. On the form, fill in the fields.

Field Map form

Field	Description
Internal Field	Field name in Agile Development 2.0.
Lookup Column Name	This field is required when you select a reference field as the internal field. For more information, see Configuring a reference field in Azure DevOps.
Table Map	Table map in Agile Development 2.0, in which this field is created. This field is auto-populated based on the table map record you select.
External Field	Field ID in Azure DevOps.
External Field Name	Display name of the field in Azure DevOps.

7. Click **Submit**.

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What to do next

1. Validate your new table map configuration by clicking **Validate and fix mapping** from your process map form.
2. From the Table maps related list, navigate to your new field map configuration. If the Valid column of your configuration shows:
   - true, validation of your map configuration is successful.
   - false, validation of your map configuration failed. Ensure that you enter the correct values for all fields and validate again.

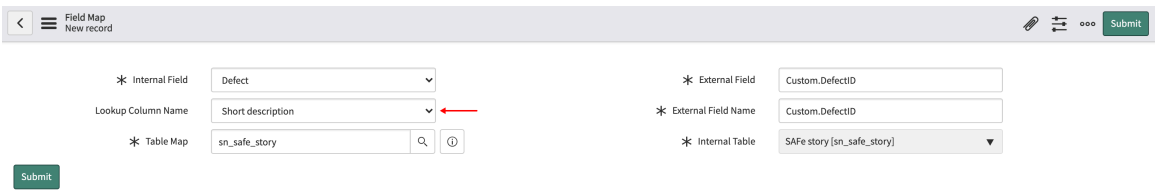
Important:
If your custom map configuration is invalid or if the required fields are not mapped for that work item, the export and import action does not work.

Configuring a reference field in Azure DevOps

Understand how to configure a reference field while creating a new field map configuration.

When you select a reference field for the **Internal Field** field, you must select a value for the **Lookup Column Name** field. The value from the **Lookup Column Name** field is used during the import and export of work items between Azure DevOps and Agile Development 2.0.

During import, the integration application searches for the record in the reference table using the **Lookup Column Name** field. If the record is not found, the value in the work item will be empty in Agile Development 2.0.



Customize your state map configuration

Create a custom state map for a field of an Agile Development 2.0 table to map the workflow states of your preference for Azure DevOps projects of a process type.

Before you begin

- Discover and import Azure DevOps projects.
- Role required: sn_ado_int.user

About this task

You can map a state in Azure DevOps to multiple states in Agile Development 2.0. In such cases, the state in Agile Development 2.0 for an issue type depends on the choice order value that you provide for this state configuration.

For example, when an work item from Azure DevOps that is in the **Active** state imported, the **State** field in Agile Development 2.0 is set to **Work in progress** as it has the lowest choice order value.

You can also map multiple states in Azure DevOps to a single state in Agile Development 2.0.

Procedure

1. Navigate to **All** > **Agile Azure DevOps Integration** > **Azure DevOps Instances**.
2. Open your Azure DevOps instance record.

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3. From the Process Mapping related list, open a process map for which you want to customize the choice map configuration.
4. Open the workflow state map for this process type.
   a. From the Table Maps related list, click **User Story**.
   b. From the Field Maps related list, click **state**.
5. From the Choice maps related list, click **New**.
6. On the form, fill in the fields.

Choice Map form

Field	Description
Internal Choice	Value of the state in Agile Development 2.0. This value is an integer.
External Choice	Name of the state in Azure DevOps.
External Choice Name	Display name of the state in Azure DevOps.

7. Click **Submit**.

What to do next

1. Validate your new table map configuration by clicking **Validate and fix mapping** from your process map form.
2. Navigate to your new choice map configuration. If the Valid column of your configuration shows:
   - true, validation of your map configuration is successful.
   - false, validation of your map configuration failed. Ensure that you enter the correct values for all fields and validate again.

Create a business rule to apply a custom table map configuration

Create a business rule to enable export from your new custom map configuration of an Agile Development 2.0 table to your Azure DevOps projects.

Before you begin

Role required: admin

About this task

After you create a custom table map for an Azure DevOps process type, create a business rule similar to Synch Story with Azure DevOps to support export of information using this new table map to Azure DevOps.

Procedure

1. Navigate to **All** > **System Definition** > **Business Rules**.
2. From the list of available business rules, locate and open the Synch Story with Azure DevOps rule.
3. From the context menu (☰), perform an Insert and Stay operation on this business rule.
   If you have not enabled the **Insert and Stay** action in your ServiceNow instance, see Allow insert options on records.
4. On the business rule form, edit the following fields.

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Business rule form

Field	Description
Name	Unique name for the business rule. For example, if your new table map is to map defects, name this rule as Sync Defect with Azure DevOps.
Table	Select the table in Agile Development 2.0 for which you've created the custom map. For example, Defect [rm_defect].

5. Click **Update**.

Allow import and export of attachments on a custom table

Enable import and export of attachments between Azure DevOps and Agile Development 2.0 for a custom table that you added to the map configuration of a process type.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definitions** > **Business Rules**.
2. From the list of business rules, locate and open the Sync Attachment to Azure rule.
3. In the When to run section of the form, include your custom table map by adding it to the filter conditions.
   For example, if the custom table that you added is Defect, do the following:
   a. Click **Add "OR" Clause**.
   b. Set the new clause to **Table name is rm_defect**.
4. Click **Update**.

Populate Azure DevOps identifier reference fields for a custom table

Enable Azure DevOps project identifier reference fields for an Agile Development 2.0 table that you added to the map configuration of a process type.

Before you begin
Role required: admin

About this task
You can display references of ID, key, Azure DevOps project, and the project URL on your custom table form by adding this table to the Populate External Identifier Reference business rule.

Procedure

1. Navigate to **All** > **System Definitions** > **Business Rules**.
2. From the list of business rules, locate and open the Set external URL for Work Items rule.
3. In the When to run section of the form, include your custom table map by adding it to the filter conditions.

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For example, if the custom table that you added is Defect, do the following:

a. Click **Add "OR" Clause**.

b. Set the new clause to **Reference table is rm_defect**.

4. Click **Update**.

What to do next

Configure the form layout or personalize the list layout of your custom table to display any or all of the following fields.

- External ID
- External Key
- External Project
- External URL

Related topics

Personalise a v2 list

Configuring the form layout

Configuring Azure DevOps integration with SAFe

Understand how to set up Microsoft Azure DevOps integration with SAFe in your ServiceNow instance.

1. Identify the process in Azure DevOps that maps to SAFe.

   From the Process Mappings related list of your Azure DevOps instance record, identify the process that maps to SAFe configuration.

   If the Process Mappings related list is empty, discover Azure DevOps projects and try again.

2. Update the map configuration to import SAFe entities.

   For information on how to create a table, field, and workflow state mapping for SAFe entities, see Customizing your map configuration for Azure DevOps integration.

3. See Configuring Azure DevOps projects for SAFe.

Configuring Azure DevOps projects for SAFe

Set up SAFe related configuration in Azure DevOps projects and understand the workflow of SAFe PI and Sprint integration with Azure DevOps.

After creating map configuration for SAFe entities, import areas, teams, and iterations for your Azure DevOps projects and update the following fields. These fields are mandatory if **Sync Sprints** is set to **true**.

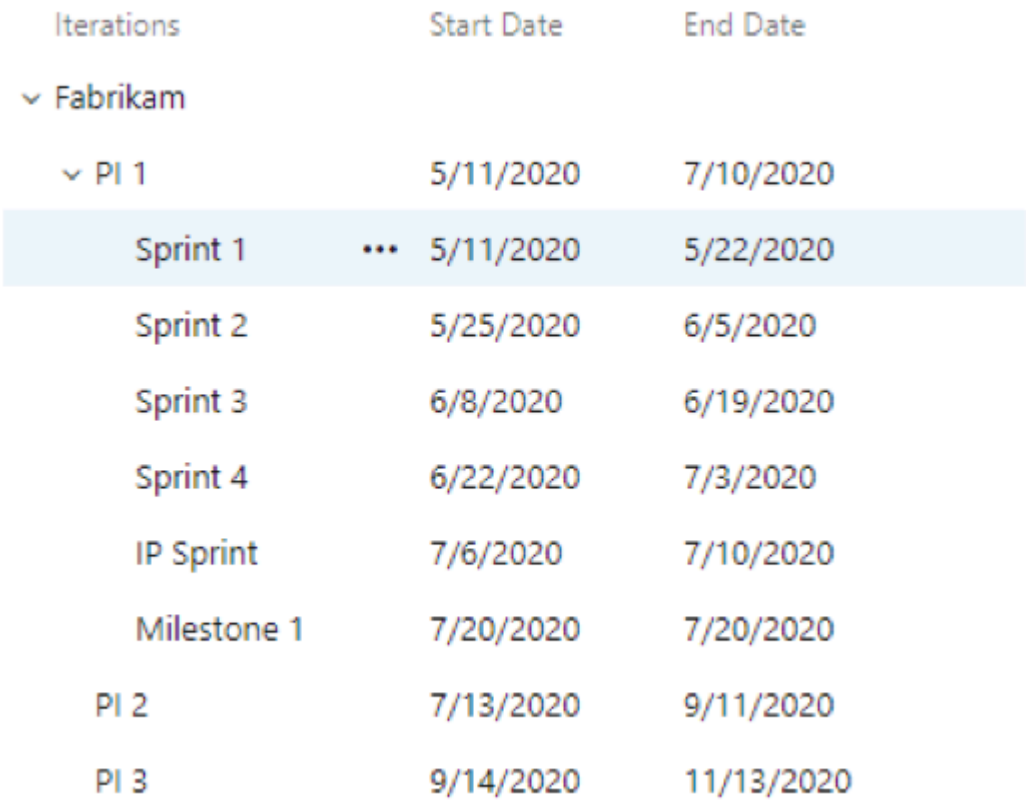
- **ART**: Select an agile release train (ART).
- **ART Iteration Path**: Select an iteration that is an equivalent to the parent of PI.

> **Note:**
> If the ART Iteration Path lookup ( ) does not return any records, import areas, teams, and iterations from Azure DevOps and try again.

For the example shown in the following screenshot, **Fabrikam** must be selected as the ART Iteration path.

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The application will then automatically identify PI 1 as the program increment and Sprint 1, Sprint 2, and so on, as the corresponding SAFe sprints in the ServiceNow instance.



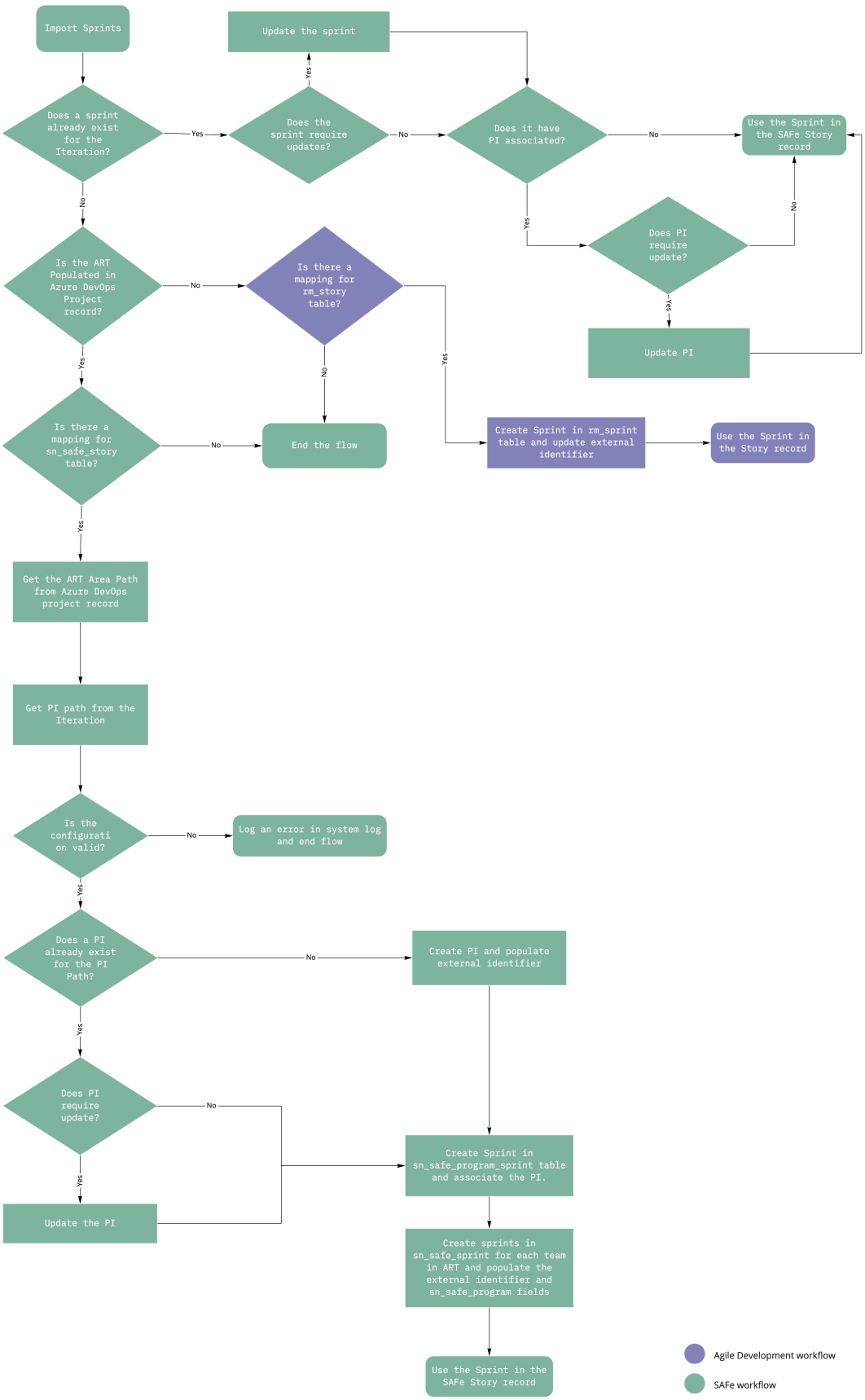
Iterations	Start Date	End Date
Fabrikam		
PI 1	5/11/2020	7/10/2020
Sprint 1	5/11/2020	5/22/2020
Sprint 2	5/25/2020	6/5/2020
Sprint 3	6/8/2020	6/19/2020
Sprint 4	6/22/2020	7/3/2020
IP Sprint	7/6/2020	7/10/2020
Milestone 1	7/20/2020	7/20/2020
PI 2	7/13/2020	9/11/2020
PI 3	9/14/2020	11/13/2020

Important:

- To create team integration settings for a project, the SAFe teams must be a part of the project's ART.
- All teams of an ART must share the same sprint cycle.

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SAFe sprint and PI integration workflow



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Troubleshooting issues of Azure DevOps integration with SAFe

Resolve common issues that you might face while working with the integration of Azure DevOps and SAFe.

Issue	Action
The **ART** and **ART Iteration Path** fields are not displayed in the Azure DevOps project form.	Ensure that table mapping exists for SAFe stories.
Sprint is not imported from Azure DevOps to SAFe.	• Check the state of the sprints. Sprints of only the states Future and Current are imported. • Ensure that there are no overlapping sprints.
PI is not imported from Azure DevOps to SAFe.	• Ensure that there are no overlapping PIs. • Ensure that the correct ART Iteration Path is selected in the Azure DevOps project form.
The error message *`Ensure that the selected assignment group belongs to the ART and try again`* is displayed in the Azure DevOps project form.	The assignment groups in all the team integration settings of this Azure DevOps project must be the SAFe teams that belong to the ART selected for this project. If not, add these SAFe teams to the ART and proceed to create team integration settings using these SAFe teams as assignment groups.
Sprints are not linked with SAFe features	Features can be linked to the PI but not with the sprints, as it's not supported in SAFe. Select the PI iteration path in the feature in the Azure DevOps portal, which should link the feature to the PI in SAFe.

Related topics

Troubleshooting issues for Azure DevOps integration with Agile Development

Generate a default map configuration between Azure DevOps and Agile Development 2.0

Generate a default mapping for an Azure DevOps process type if you want to reset the existing map configuration.

Before you begin

- Discover and import Azure DevOps projects.
- Role required: sn_ado_int.user

About this task

You can restore the default map configuration of an Azure DevOps process type by deleting the existing table maps and then creating mappings for this process type.

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When you import available work items such as epics and stories from Azure DevOps, this data is stored in tables as defined in the map configuration of the project's process type.

If the table map does not exist for a work item in your Azure DevOps process, this work item cannot be imported and exported between Azure DevOps and Agile Development 2.0.

Procedure

1. Navigate to **All** > **Agile Azure DevOps Integration** > **Azure DevOps Instances**.
2. Open your Azure DevOps instance record.
3. From the Process Mapping related list, open a process map for which you want to generate the default map configuration.
4. Click **Create Mappings**.

   Note:
   If a table maps already exist for this process, the **Create Mappings** button is not displayed.

   A request of the type Create Mappings is created and is visible in the Azure DevOps Import Requests related list of your Azure DevOps instance.

Result

Once the state of the Create mappings request changes to **Completed**, you can see that the **Mapping Config** field of this Azure DevOps process is populated. Also, you can see the default map configuration in the Table Maps related list of this process.

Related topics

Customizing your map configuration for Azure DevOps integration

Importing and exporting work items between Agile Development and Azure DevOps

Understand the workflow for the import and export of work items between Agile Development and Azure DevOps.

To enable import and export of work items between Agile Development 2.0 and Azure DevOps, you must configure the settings.

Importing to Agile Development 2.0 from Azure DevOps

- When you create a work item of type epic in Azure DevOps, an epic is created for the assignment group according to the team integration settings that you configured.
- When you create a work item of type story in Azure DevOps, a story is created for the assignment group according to the team integration settings that you configured.

  The relationship between the story and its epic is retained as it is in Azure DevOps.
- Only the fields that are defined in the field map configuration are retained in the story or epic. For the details of the default map configuration, see Default map configuration for Azure DevOps integration with Agile Development 2.0.
- When you add an attachment to a work item in Azure DevOps, the same attachment is added to the corresponding story or epic in Agile Development 2.0.
- Any new iterations created in Azure DevOps do not create a corresponding sprint record in Agile Development 2.0 immediately.

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When a work item is added for the first time to the new iteration in Azure DevOps, only then a corresponding sprint record is created in Agile Development 2.0. To ensure consistent data across the two applications at all times, create sprints in Agile Development 2.0.

- Only leaf level iterations are retained as sprints in Agile Development 2.0.
- When you add comments for an issue in Azure DevOps, they are updated in the **Work notes** field of the story or epic in Agile Development, based on the map configuration.

> **Note:**
> The images added in the comments are not supported.

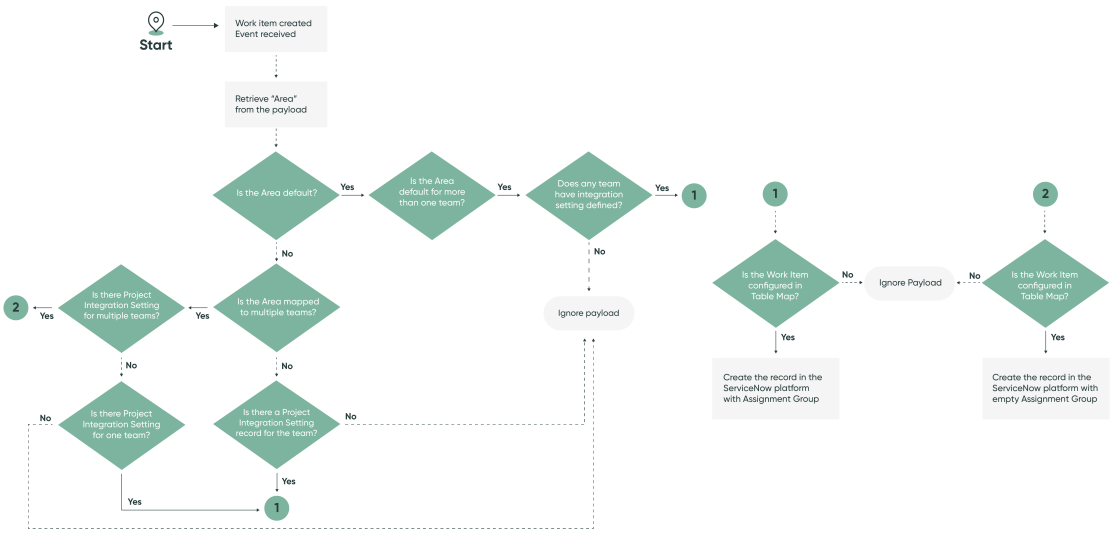
- When you delete a work item in Azure DevOps, the corresponding record is deleted in Agile Development 2.0.
- When you delete an iteration in Azure DevOps, the corresponding sprint is deleted in the Agile Development 2.0.

> **Note:**
> To delete records in the Agile Development 2.0, set the **Can Delete** field to **true** in the Application access of the respective tables. For details, see Table design and runtime settings.

- When you restore a work item from recycle bin in Azure DevOps, a corresponding record is created in Agile Development 2.0 according to its team integration settings.

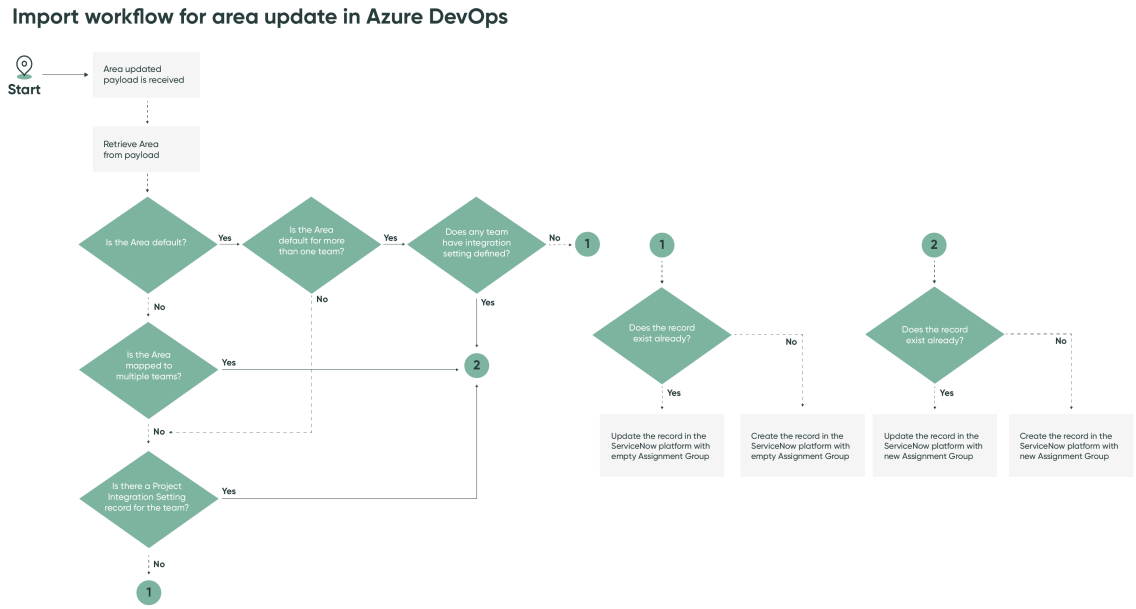
Import workflow for work items created in Azure DevOps

Import workflow for work item created in Azure DevOps



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Import workflow for areas updated in Azure DevOps



Exporting from Agile Development to Azure DevOps

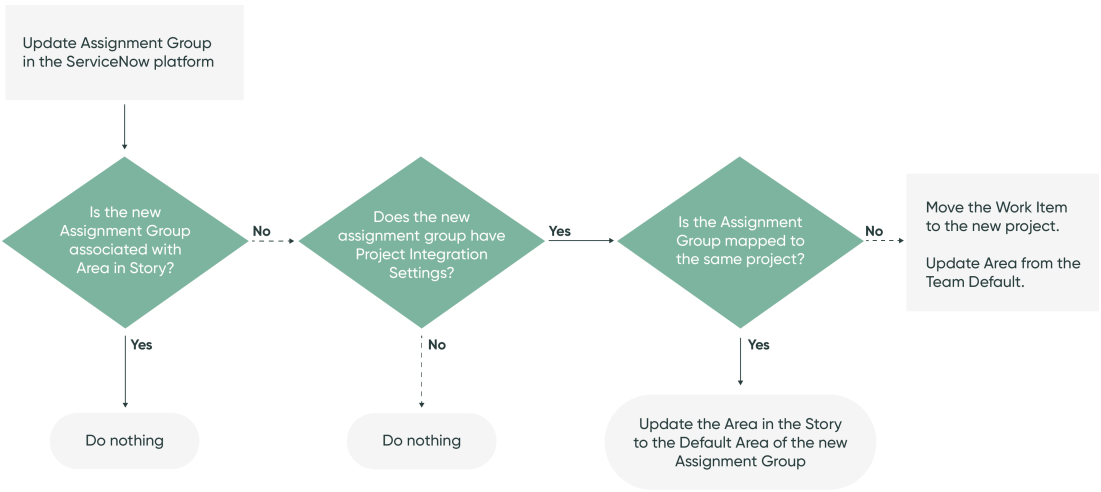
- When you create an epic for an assignment group, it is exported as a work item to the area in Azure DevOps according to the team integration settings that you configured.
- When you create a story for an assignment group, it is exported as a work item to the area in Azure DevOps according to the team integration settings that you configured.

  The relationship between the story and its epic is retained in Azure DevOps.
- When you add an attachment to a story or an epic, the same attachment is added to the corresponding work item in Azure DevOps.
- When you update the assignment group of an existing story in the Agile Development 2.0, the work item is recreated for the Azure DevOps area that is associated with the updated assignment group.
- When you create a sprint for an assignment group in Agile Development 2.0, it is exported to Azure DevOps under its backlog iteration as per the team integration settings.
- When you delete a sprint for an assignment group in Agile Development 2.0, it unlinks the sprint selection from the team's iteration in Azure DevOps.
- When you update a work item in Agile Development 2.0, only the fields that are updated are sent to Azure DevOps as a part of the payload

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Export workflow for assignment groups updated in Agile Development 2.0

Export workflow for assignment group update in Agile Development



Sync sprint details between Agile Development 2.0 and Azure DevOps

Sync sprint details from Agile Development 2.0 to Azure Devops. Any change in the sprint details in Agile Development 2.0 is exported to Iteration paths in Azure DevOps, when the Sync sprint field is checked.

Sync Sprint details for a new work item in Agile Development 2.0

Sync Sprint	Export	Import
Disabled (Iteration path available in Azure Devops)	Sends the default iteration path for the project to Azure DevOps.	Sprint value does not change in Agile Development 2.0.
Disabled (Iteration path is not available in Azure Devops)	Sends the default iteration path for the project to Azure DevOps.	Sprint value does not change in Agile Development 2.0.
Enabled (Iteration path is available in Azure Devops)	Sends the appropriate iteration path for the project to Azure DevOps.	Sprint value does not change in Agile Development 2.0.
Enabled (Iteration path is not available in Azure Devops)	Sends the default iteration path for the project to Azure DevOps.	Sprint value clears in Agile Development 2.0.

Sync sprint details for an existing work item in Agile Development 2.0

Sync sprint	Export	Import
Disabled	Sends the previous iteration path to Azure. Iteration path will be same in Azure DevOps.	Sprint value in Agile Development 2.0 is selected.
Enabled	Sends the new iteration path based on the selection.	Sprint value in Agile Development 2.0 is selected.

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Sync sprint details for an existing work item in Agile Development 2.0 (continued)

Sync sprint	Export	Import
	Iteration will be changed based on selection.	

Troubleshooting issues for Azure DevOps integration with Agile Development

Resolve common issues that you might face while working with the integration of Azure DevOps and Agile Development 2.0.

Issue	Action
The export action is not working.	• Review your custom map configuration. If your custom map configuration is invalid or if the required fields are not mapped for that work item, export does not work. • Ensure that the **Enable Export** check box is selected for the project. • Check to see if your Azure DevOps password has expired.
Sprint is not imported from Azure DevOps to Agile Development 2.0.	Sprints are not imported to Agile Development 2.0 for one of the following reasons: • Any new iterations created in Azure DevOps do not create a corresponding sprint record in Agile Development 2.0 immediately. When a work item is added for the first time to the new iteration in Azure DevOps, only then a corresponding sprint record is created in Agile Development 2.0. To ensure consistent data across the two applications at all times, create sprints in Agile Development 2.0. • Ensure that there are no overlapping sprints.
An assignment group is not populated for a story or an epic.	If the team is not associated with an assignment group in Agile Development 2.0, it can result in assignment group not being populated. Verify that project integration settings exist for your Azure DevOps team. If the area of a work item is mapped to multiple teams, the assignment group for that work item in Agile Development 2.0 is empty. In such cases, you can manually select an assignment group for this work item.

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Issue	Action
A value from a field in Azure DevOps is not populated in Agile Development 2.0.	Verify if the custom field map is configured.
The value of **Priority** or **State** fields from Azure DevOps is not populated in Agile Development 2.0.	Verify if the custom state map is configured.
An update by a user in Azure DevOps is not updated in Agile Development 2.0.	Ensure that the user credentials that are used to set up the integration of Azure DevOps with Agile Development 2.0 are not used to perform record updates.
The work item is deleted in Azure DevOps but not deleted in Agile Development 2.0.	Ensure that the **Can Delete** field in the Application access of the respective tables is set to **true**. For details, see Table design and runtime settings.
Deleting a project, team, or area does not result in any action in Agile Development 2.0.	After deleting the project, team, or area in Azure DevOps, the Azure DevOps administrator must manually delete the corresponding Azure DevOps project and its associated stories in Agile Development 2.0.
New Azure DevOps projects are not imported automatically.	Manually discover projects from the Azure DevOps instance record to immediately synch the project updates or schedule a job to discover and import these updates on a daily basis. For more details on the scheduled jobs, see Schedule jobs to import projects, teams, areas, and work items from Azure DevOps.
Imported work items (epics and stories) of a project have no assignment group associated with them.	Ensure that you have team integration settings for this project. For more information, see Associate Azure DevOps projects with assignment groups in Agile Development 2.0. The assignment group associated to any imported work item of an Azure DevOps project is based on the team integration settings of that project. If the project does not have any team integration setting, the imported work item will have an empty assignment group.
Changes made to iterations in Azure DevOps are not reflecting immediately in Agile Development 2.0.	Manually import iterations from the Azure DevOps project record or schedule a job to discover and import these updates daily.

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Issue	Action
	For more details on the scheduled jobs, see Schedule jobs to import projects, teams, areas, and work items from Azure DevOps.
The UI actions for Connect, Disconnect, and Validate and Fix result in an error when using for the first time.	This error is a known issue. Retry the UI action.
When the **Description** field has & in Azure DevOps, it renders as & in Agile Development 2.0.	The field mapping between Agile Development 2.0 and Azure DevOps is not supported for HTML fields.
Export still works when the webhooks are de-registered.	Webhooks are only to import data from Azure DevOps to Agile Development 2.0. To stop the export of workitems, de-select the **Export Work Items** checkbox for the project.

Enabling detailed project logs

To view all the details on project logging, enable the integration project logging property. For more information, see Enable detailed project logging in Microsoft Azure DevOps Integration with Agile Development 2.0.

Enable detailed project logging in Microsoft Azure DevOps Integration with Agile Development 2.0

Understand how to enable the integration project logging in Microsoft Azure DevOps integration with Agile Development 2.0 so that you can view detailed project logs.

Before you begin

Role required: sn_jira_int.admin (with edit access) or sn_jira_int.user (with read access).

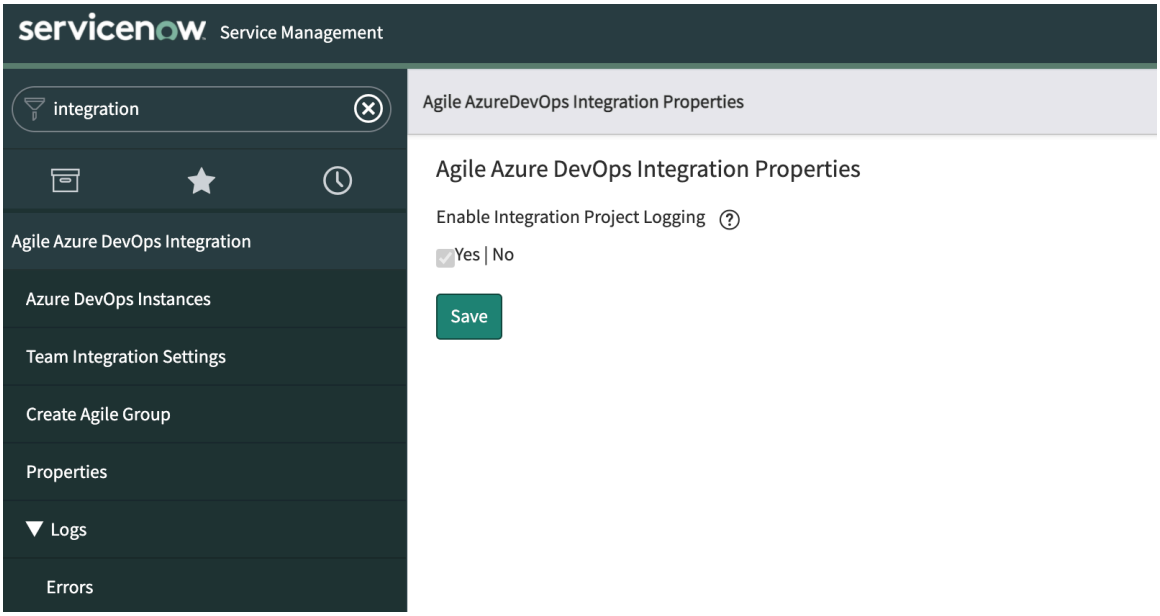
About this task

Enable the project logging property in the Agile Azure DevOps Integration application.

Procedure

1. Navigate to **All** > **Agile Azure DevOps Integration** > **Properties**.
2. Select the **Enable Integration Project Logging** check box.

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3. Click **Save**.

Agile Development 2.0 reference

Reference information to provide additional details about Agile Development 2.0 application such as the fields, related lists, user roles, tables, guidelines, and domain separation information.

Components installed with Agile Development 2.0

Several types of components are installed with activation of the Agile Development 2.0 plugin, including tables, user roles, and properties.

Note:
The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Roles installed

Role title [name]	Description	Contains roles
Scrum admin [scrum_admin]	A scrum admin has full control on the Agile Development 2.0 application.	• scrum_user • rm_product_admin • rm_task_admin • rm_test_admin • rm_doc_admin • rm_story_admin • rm_epic_admin

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Role title [name]	Description	Contains roles
		• rm_releasescrum_admin • rm_sprint_admin
Scrum master [scrum_master]	A scrum master guides team members through a sprint and serves as a sounding board for issues that arise. A scrum master can move stories between a release backlog and a sprint. This user can create and manage: • Epics • Stories • Sprints • Team Members	• scrum_sprint_planner • scrum_story_creator • scrum_user
Scrum product owner [scrum_product_owner]	Users with this role are responsible for the business value of a project and for maintaining the product backlog. A product owner can move stories between the product backlog and releases. This user can create and manage: • Themes • Epics • Stories • Products • Releases • Teams	• scrum_release_planner • scrum_story_creator • scrum_user
Scrum release planner [scrum_release_planner]	Users with this role perform release planning activities. A release planner can create and manage: • Themes • Products • Releases	• scrum_user • scrum_story_creator
Scrum sprint planner [scrum_sprint_planner]	Users with this role manage the sprint process. A sprint planner can create and manage:	• scrum_user • scrum_story_creator

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Role title [name]	Description	Contains roles
	• Stories • Sprints	
Scrum story creator [scrum_story_creator]	Users with this role create the descriptive elements of a product. A story creator can create and manage: • Epics • Stories • Tasks	• rm_scrum_task_admin • scrum_user
Scrum story editor [scrum_story_editor]	Users with this role have edit access to the Story [rm_story] table.	• scrum_user • rm_scrum_task_admin
Scrum team member [scrum_team_member]	Users with this role are the scrum users who work on a story in a sprint. A team member can create a scrum task, perform updates to a story, and log enhancement requests or defect reports.	• scrum_user • scrum_story_creator • scrum_story_editor • rm_defect_admin • rm_enhancement_admin • rm_scrum_task_admin
Scrum task admin [rm_scrum_task_admin]	Scrum task administrator with access to [rm_scrum_task] table.	scrum_user
Scrum user [scrum_user]	Basic scrum role that all other roles inherit. It confers read-only rights to the Agile Development application. A scrum user can view all elements of agile, but cannot create, edit, or manage records of any type.	cmdb_read

Tables installed

Table	Description
Product Assignment Group [m2m_product_group]	Stores relationship between products and groups.
Release Assignment Group [m2m_release_group]	Stores relationship between releases and groups.
Application Model	Represents whole product whose releases are being managed.

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Table	Description
[cmdb_application_product_model]	
Release Product [m2m_product_release]	Represents all managed products.
Story Dependencies [m2m_story_dependencies]	Represents all related stories (prerequisite and dependent) to an existing story.
Scrum task [rm_scrum_task]	Represents a discrete amount of work for a story carried out during a sprint.
Release team member [scrum_pp_release_team_member]	Represents the list of users who are part of a release.
Sprint team member [scrum_pp_sprint_team_member]	Represents the list of users who are part of a sprint.
Team [scrum_pp_team]	Represents who completes scrum tasks and stories during releases and sprints.
Team name [scrum_pp_team_name]	Represents the name of the scrum team.
Theme [scrum_theme]	Represents either a tangible product (such as a trading application) or an abstract goal (such as performance tuning).
Scrum release [rm_release_scrum]	Represents individual versions (releases) of the product. Each release contains a list of sprints with a time range in which the stories in those sprints must be completed.
Sprint [rm_sprint]	Stores sprints, which are the backlog items to be addressed together during a given time period.
Epic [rm_epic]	Represents related stories or requirements that you have not yet transformed into stories.
Story [rm_story]	Represents self-contained pieces of work that can be completed within a sprint.
Defect [rm_defect]	Represents a deviation from the expected behavior of a product.
Documentation Task [rm_doc]	Represents documentation tasks for the product.

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Table	Description
Enhancement [rm_enhancement]	Represents an improvement to an existing product.
SDLC release [rm_release_sdlc]	Represents individual versions of the product.
Testing Task [rm_test]	Represents testing tasks for the product.

Note:

Dashboards in Agile Development require a separate plugin to be installed and configured. For information about Agile 2.0 dashboards and reports, including burndown charts and cumulative flow diagrams, see Agile Development process flow and Performance Analytics Content Pack for Agile 2.0.

Properties installed with Agile Development 2.0

Properties are added with activation of Agile Development 2.0.

Agile Development 2.0 adds the following properties.

Note:
All of these properties are located in the System Properties [sys_properties] table. To access the table, enter `sys_properties.list` in the navigation filter.

Property	Usage
Draw Burndown Chart ideal line as a linear straight line com.snc.sdlc.scrum.pp.burndown.ideal.linear	Draws the burn down chart ideal line as a straight line. • Type: true|false • Default value: false
Stories in any one of the states specified in this comma separated list will be shown in the progress board (in the order specified) com.snc.sdlc.scrum.pp.progress.story.states	Specify the story states using a comma separated list that should be shown in the story progress board. The states in the progress board follow the same order as specified here. • Type: integer • Default values in their order: ○ -6: Draft ○ 1: Ready ○ 2: Work in progress ○ -7: Ready for testing ○ -8: Testing ○ 3: Complete

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Property	Usage

Tasks in any one of the states specified in this comma separated list will be shown in the progress board (in the order specified)
 	
com.snc.sdlc.scrum.pp.progress.task.state
	Specify the task states using a comma separated list that should be shown in the progress board. The states in the progress board follow the same order as specified here.
	
	• Type: integer
	• Default values in their order:
	  ○ -6: Draft
	  ○ 1: Ready
	  ○ 2: Work in progress
	  ○ 3: Complete

Enable the Actual Hours field for scrum tasks com.snc.sdlc.scrum.pp.task_uses_actual_hours	Enable the *Actual hours* field in the Scrum Task form. Displays actual hours of tasks on the task progress board. • Type: true|false • Default value: true
The default sprint length (in days) used if the length cannot be calculated from the sprint. com.snc.sdlc.scrum.pp.default_sprint_length	Specify a default sprint duration that should be used when creating a sprint, if the sprint length cannot be calculated from the sprint. • Type: integer • Default value: 14

Writing effective stories in Agile Development 2.0

Well-written stories are easy to understand by all developers and members of team members, such as Testing or Documentation.

Stories enable the assignment group to accurately estimate the effort required to implement the work according to the definition of done. Definition of done is the exit criteria agreed to by the group, that determines when a story is complete.

A story has the following basic conditions:

- Description: The story description relates to a user persona, such as administrator, and either describes a business value or addresses a technical debt.
- Acceptance criteria: The story acceptance criteria are measurable and testable.

Story descriptions

A good user story description identifies the following for meeting the stated requirement:

- the role of the user persona in the system
- the need expressed by the user persona
- the benefit to all stakeholders such as developers, users, and others

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Typically, a story description is expressed as: "As a <role>, I want <goal or need>, so that <benefit>".

Examples of good story description

- Description: As a developer, I want to publish the current state of my application to an update set, so that I can deploy it to a production system.
- Description: As a customer, I want to receive notifications when comments are entered for an incident so that I am updated on the status.
- Description: As a change manager, I want to enable the assessment of risk for any given change by establishing a list of questions with multiple choice answers.

Example of bad story description

Description: Notifications are sent when incidents are created.

This description is poor because:

- The description does not state who or what is sending the notifications, not in what form the notification takes, such as email.
- The description does not include any benefit information, so the business value is not clear.

It could be better written as:

Description: As an incident creator, I want email notifications to be sent to a predefined set of interested parties when I create an incident, so that they can be informed when an incident affecting them is created.

Story acceptance criteria

Acceptance criteria define the boundaries of a user story, and are used to confirm when the software is working as intended, which means the story is completed. Acceptance criteria are an essential part of the 'Definition of Done' for a story.

Good acceptance criteria

Good acceptance criteria should include the following, where relevant:

- Usability: Be sure to include measures of usability in the acceptance criteria. Indicate how to answer the question: Is it easy to use? The key is to identify the right measurements and make sure each is quantifiable.
- Functionality: Identify specific user tasks, business processes, or functions that must be in place at the end of the project. A functional requirement might be: The user can choose from multiple sizes.
- Error handling: Enumerate error cases and how each should be handled. For example, if a user performs the steps in the wrong order, how will the software handle it?
- Performance: Test system performance from the perspective of an individual user. For example: Is the UI responsive?
- Stress tests: Describe how the system responds when it is under stress because there are many users, transactions, or queries. Acceptance criteria should define acceptable thresholds for stress testing. For example: Does the system respond within a 250-millisecond threshold when 100 users submit queries simultaneously?

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Example of Good Acceptance Criteria

Description: As a customer, I want to order and pay for the book via a secure web-based form, so that my credit card information is safe.

Acceptance Criteria:

- All mandatory fields must be completed before a customer can submit a form.
- Information from the form is stored in the customer orders database.
- Payment can be made via Amex, Master Card, or Visa credit card.
- The system shall accurately calculate and apply sales tax.
- The system shall accurately calculate and apply shipping charges.
- The customer shall be able to verify the accuracy of the order.
- An acknowledgment email is sent to the customer submitting the form.
- Protection against spam is working.

Example of Bad Acceptance Criteria

Description: As a customer, I want to receive notifications when an incident is commented, so that I am updated on the status.

Acceptance Criteria: The appropriate people are notified when incidents are commented.

The acceptance criteria are poor because they do not give enough detail to test, for example, it is not clear who the appropriate people are.

The acceptance criteria could be better written as:

1. As an ESS user, create an incident.
2. Select **Notify interested parties**.
3. Save the incident.
4. Log in as an interested party.
5. Check that you have received an email for the logged incident.

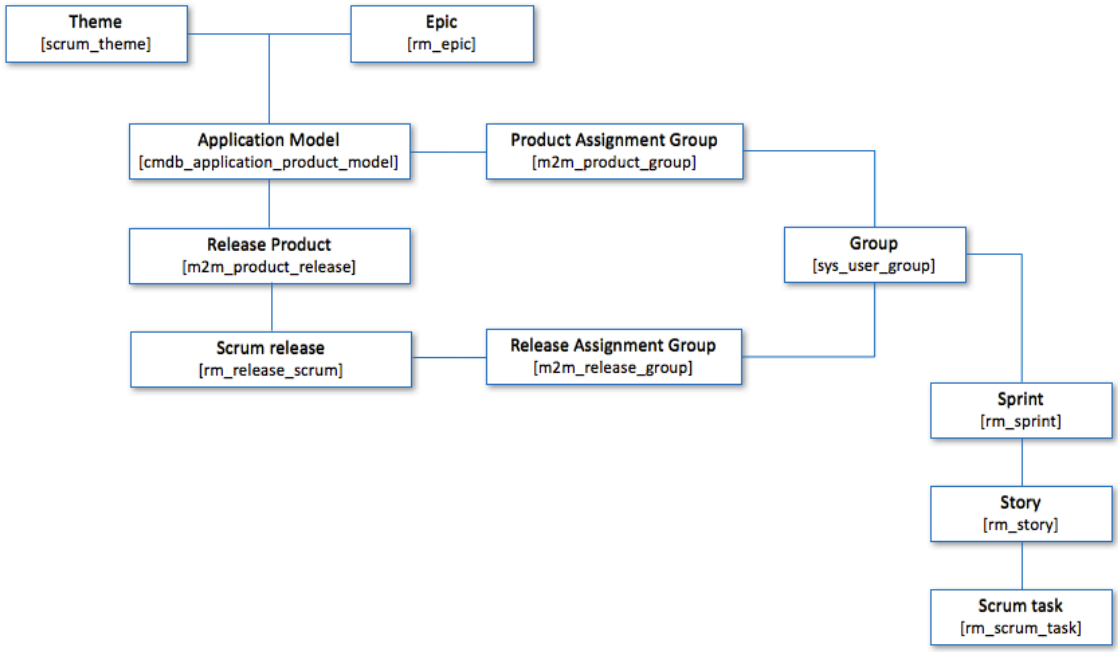
Agile Development process data model

Learn about the relationship between tables that Agile Development 2.0 uses to manage the agile process, represent releases, and represent product backlog items to be included in a sprint.

The following diagram displays the Agile Development tables as well as their relationships to other tables.

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Agile development process relationship diagram



Business stakeholder role for Agile Development 2.0

Use the business stakeholder role to read and retrieve data from any table of the Agile Development 2.0 and Scrum Programs applications to generate reports.

When you activate the Business Stakeholder plugin (com.snc.business_stakeholder) in your ServiceNow instance, the Read only roles for Agile 2.0 plugin (com.snc.agile_read_roles) is also activated. This plugin provides a business stakeholder role (sn_agile_read) with which you can access all the tables of Agile Development 2.0 and Scrum Programs applications. You can assign this role to any user in your organization who is a business stakeholder.

Plugin availability

If you are a new customer, the Read only roles for the Agile 2.0 plugin (com.snc.agile_read_roles) is activated on zBoot. However, the business stakeholder role (sn_agile_read) is available only when you activate the Agile Development 2.0 plugin (com.snc.sdlc.agile.2.0).

If you are an upgrade customer, you must manually activate the read-only roles for Agile 2.0 plugin (com.snc.agile_read_roles).

Agile Development 2.0 tables accessible by users with the business stakeholder role

When both the Read only roles for Agile 2.0 plugin (com.snc.agile_read_roles) and the Agile Development 2.0 plugin (com.snc.sdlc.agile.2.0) are active in your ServiceNow instance, the user with the business stakeholder role (sn_agile_read) has read access to the following tables.

Agile Development 2.0 tables

Table	Description
Product Assignment Group [m2m_product_group]	Stores relationship between products and groups.

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Agile Development 2.0 tables (continued)

Table	Description
Release Assignment Group [m2m_release_group]	Stores relationship between releases and groups.
Application Model [cmdb_application_product_model]	Represents a whole product whose releases are being managed.
Release Product [m2m_product_release]	Represents all managed products.
Story Dependencies [m2m_story_dependencies]	Represents all related stories (prerequisite and dependent) to an existing story.
Scrum task [rm_scrum_task]	Represents a discrete amount of work for a story carried out during a sprint.
Sprint team member [scrum_pp_sprint_team_member]	Represents the list of users who are part of a sprint.
Team [scrum_pp_team]	Represents who completes scrum tasks and stories during releases and sprints.
Team name [scrum_pp_team_name]	Represents the name of the scrum team.
Theme [scrum_theme]	Represents either a tangible product (such as a trading application) or an abstract goal (such as performance tuning).
Scrum release [rm_release_scrum]	Represents individual versions (releases) of the product. Each release contains a list of sprints with a time range in which the stories in those sprints must be completed.
Sprint [rm_sprint]	Stores sprints, which are the backlog items to be addressed together during a given time period.
Epic [rm_epic]	Represents related stories or requirements that you have not yet transformed into stories.
Story [rm_story]	Represents self-contained pieces of work that can be completed within a sprint.
Defect [rm_defect]	Represents a deviation from the expected behavior of a product.

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Agile Development 2.0 tables (continued)

Table	Description
Enhancement [rm_enhancement]	Represents an improvement to an existing product.

Scrum Programs tables

Table	Description
epic_backlog_definition	Stores the filter criteria that is used to create the epic backlogs.
scrum_program_m2m_group	Stores the relationship between a scrum program and its teams.

Domain separation in Agile Development 2.0

This is an overview of domain separation and how it works with Agile Development 2.0. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

How domain separation works in Agile Development 2.0

- The entities in Agile 2.0 extend the functions of task, so they inherit the domain behavior of tasks. The new entries you create go into the domain of the user currently logged in.
- Agile Board honors domain separation and lists the groups that the user belongs to for Sprint Planning and Sprint Tracking pages. The backlog entries that display are in the same domain as those that the current user owns or shares with other users. The stories that display in Agile Board are limited to the domain of the current logged-in user.

Related topics

Domain separation for service providers

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Related links and lists of assignment group in Agile Development 2.0

Use the related lists in the Group form for the actions that you need to perform for your assignment group in Agile Development 2.0, such as adding sprints and editing group members.

Related links in the Group form

Name	Description
Create Sprints	Create sprints for the team. New sprints are listed in the Sprints related list of the group.
Sprint Planning	Plan your sprint activities in Agile Development 2.0.

Related lists in the Group form

Name	Description
Group Members	Lists the members of the group. You can add or remove members in the agile group by selecting **Edit**. The **Average points per sprint** field rolls up to derive the group capacity for a sprint.
Sprints	Lists the sprints for the group. Click **New** to add a sprint to the group.

Related lists for a Product in Agile Development 2.0

Use the related lists in the Product form for the actions that you need to perform on your product record in Agile Development 2.0, such as associating releases, themes, epics, stories, or assignment groups.

The Product form related lists help you organize your agile work. Agile Development 2.0 extends the standard Scrum framework with Themes, which are a high-level organizational structure above Epics.

Tip:

In Agile Development 2.0, Product > Theme > Epic > Story > Scrum Task. For detailed definitions, see Basics of Agile Development.

Product form related lists

List	Description
Releases	Lists the releases associated with the product. You can create a release and associate it with this product by selecting **New** or add an existing release by selecting **Add**.
Themes	A high-level area of focus with associated business value, related to one or more company goals. Themes help prioritize work and can be associated with multiple epics.

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Product form related lists (continued)

List	Description
	Lists the themes that are part of the product. You can create a theme and associate it with this product by selecting **New** or add an existing theme by selecting **Add**. For more information, see Create a theme in Agile Development 2.0.
Epics	High-level definition of a requirement that provides business value, such as a new feature or significant enhancement. Epics are broken down into stories and can be worked on by single or multiple teams. Lists the epics associated with the product. You can create an epic and associate it with this product by selecting **New** or add an existing epic by selecting **Add**. For more information, see Create an epic in Agile Development 2.0.
Stories	Short, manageable pieces of work related to an epic. Stories capture the who, what, and why of a requirement in a simple, concise way, enabling accurate effort estimation. Lists the stories associated with the product. You can create a story and associate it with this product by selecting **New** or add an existing story by selecting **Add**. For more information, see Create a story in Agile Development 2.0.
Groups	Lists the groups assigned to the product. You can assign an existing agile group to the product by selecting **Edit**. You can associate one or more assignment groups (of type Agile Team) to a product. When you associate a product to a release, the groups assigned to the product are automatically added to the release too.

Related lists for a Release in Agile Development 2.0

Use the related lists in the Release form for the actions that you need to perform for your release in Agile Development 2.0, such as associating products, stories, or assignment groups.

Release form related lists

List	Description
Products	Lists the products associated with the release. You can create a product and associate it with this release by selecting **New** or add an existing product by selecting **Add**.
Stories	Lists the stories associated with the release. You can create a story and associate it with this release by selecting **New** or add an existing story by selecting **Add**. The stories you add here create the release backlog.
Groups	Lists the groups assigned to the release. You can assign an existing agile group to the release by selecting **Edit**.

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Release form related lists (continued)

List	Description
	When you associate a product to a release, the groups assigned to this product are automatically added to the release.

Related links and lists for a Story in Agile Development 2.0

Use the related links and related lists on the Story form for the actions that you need to perform on your story in Agile Development 2.0, such as adding scrum tasks, dependencies, or splitting the story.

Related links of a story

Name	Description
Split Story	Splits the story into two stories by creating a new story with the same details. Any incomplete tasks from the old story are moved to this new story. **Note:** State of the Story cannot be **Cancelled** or **Completed**, and the **Original task** field, if present, cannot contain a non-story record such as a Catalog Task or Defect.
Add Scrum Tasks	Enables you to create multiple scrum tasks for the current story. The scrum tasks are listed in the Scrum Tasks related list of the story. For more information, see Create multiple scrum tasks for stories in Agile Development 2.0.
Convert into epic	Converts an active story into an epic and moves the story into the Cancelled state. If the story that you created is too large, you can convert it into an epic and then break it down into multiple stories. • If this story is already associated with an epic, then the story is turned into a child epic for this epic. For example, STRY01 is converted to EPIC01. If STRY01 was associated with EPIC02, then EPIC01 becomes a child epic to EPIC02. Otherwise, EPIC01 is created as a standalone epic. • The state of the newly created epic is automatically set to **Draft**. • The canceled story is associated with the newly created epic.
Copy Story	Copies the details of an existing active story to a new story. The tests and tasks of the story are also copied. The state of the newly created story is automatically set to Draft. This action is not available for stories added from the triage board.

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Related links of a story (continued)

Name	Description
	Note: State of the Story cannot be **Cancelled** or **Completed**, and the **Original task** field, if present, cannot contain a non-story record such as a Catalog Task or Defect.

Related lists of a story

Name	Description
Scrum Tasks	Lists the scrum tasks created for the story. Click **New** to create a scrum task. For more information, see Create a scrum task for Agile Development 2.0 stories.
Prerequisite Stories	Lists the stories that must be completed before the current story can be completed. Click **Edit** to add prerequisite stories.
Dependent Stories	Lists the stories that depend on the current story. Click **Edit** to add dependent stories.
Tests	Adds existing tests to the story. These tests are also listed on the **Sprint Tracking** tab of Agile Board after the sprint of this story starts.

Related topics

Create a story in Agile Development 2.0

Writing effective stories in Agile Development 2.0

Related lists for a Theme in Agile Development 2.0

Use the related lists on the Theme form for the actions that you need to perform for your theme in Agile Development 2.0, such as associating stories or epics with the theme.

Related lists of a theme in Agile Development 2.0

Field	Description
Epics	Lists the epics associated with the theme. You can create a new epic and associate it with this theme by selecting **New**
Stories	Lists the stories associated with the theme. You can create a new story and associate it with this theme by selecting **New**

Test version form in Agile Development 2.0

Learn about the fields of the Test version form. Use this form to create and run tests for a story in Agile Development 2.0.

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Test Version Form

Fields	Description
Test	Unique name of the test.
Owner	Owner who created the test.
Version	Automatically generated version of the test.
State	Current state of the test. • **Draft**: State of the test when it is created. • **Ready**: State of the test when it is not editable. When the test has multiple versions, only one test will be in **Ready** state at any one time • **Retired**: State of the test when it is no longer used.
Short description	Brief description about the test.
Add Step	Option to add step to a test.
Run	Button used to run steps, which is displayed only when the test is in the **Ready** state. See Run tests for a story in Agile Development 2.0.
Update	Option to update the details of a test version.
Ready	Option to change the state of the test version to ready.
Create New Version	Option to create another version of the test.
Delete	Option to delete the test version.
Change step order ()	Option to change the order of a test step. Select the icon and drag a step to the required location.
Needs Verification	Option to mark a test step for verification.
Delete a test step ()	Option to delete a test step.

Related topics

Track sprint progress in Agile Development 2.0

Related lists of a test version in Agile Development 2.0

Use the related lists in the Test version form for the actions that you need to perform on your test in Agile Development 2.0, such as verifying the test results, viewing other associated test versions and test sets.

Related list	Description
Other versions	Shows all the versions of a test.
Test Results	Shows the run results of each test version.
Test Sets	Shows related tests in a test set.

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Related topics

Track sprint progress in Agile Development 2.0

Mobile experience for Agile Development 2.0

Track and update the status of your stories and scrum tasks of the current sprint from your mobile device using the Agile Development v2 mobile app.

With the Agile Development v2 mobile app, you track sprints for the assignment groups that you are a part of. From your mobile device, you can do the following operations for the current sprint:

- View the status and details of stories and scrum tasks from the assignment groups that you are a part of.
- Edit and update the details of stories and scrum tasks.
- Create scrum tasks for a story.
- Add work notes and attachments to a story or scrum task.
- Collaborate with other stakeholders on a story or scrum task.
- Receive mobile notifications when notes are added to your story or scrum task.

Install Agile Development v2

Install the Agile Development v2 mobile app (sn_store_agile_mob) from ServiceNow Store.

Before you begin

Role required: admin

Procedure

1. Navigate to ServiceNow Store.
2. In ServiceNow Store, search for Agile Development v2.
3. Click the application tile.
   You can view detailed information about the application.

   Note:
   Consider reading the Other Requirements and Dependencies sections, as applicable.

4. Click **Request App** and enter your Now Support login credentials.
5. Click **Buy**.
6. Enter the **Instance Name** and **Reason for the Instance**, and click **Validate Instance**.
7. Click **Request**.
   You receive an email with detailed installation instructions.
8. Log in to the instance on which you want to install the Agile Development.
9. Navigate to **System Applications** > **Applications**.
10. Locate the application, select it, and click **Install**.

What to do next

Get started with Agile Development v2 mobile app

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Get started with Agile Development v2 mobile app

Access the Agile Development mobile app to track your sprints, stories, and tasks.

Before you begin

- Download the Mobile Agent mobile app from App Store (iOS) or Google Play Store (Android).
- Install Agile Development v2 on your ServiceNow instance.
- Role required: admin

Procedure

1. Log in with your ServiceNow instance address on the Mobile Agent app on your mobile device in one of the following ways:

Existing user	○ If you installed the Agile Development v2 mobile app on an instance that you already use in the Mobile Agent app, refresh the app to see **Agile 2.0** as an applet launcher. ○ If you installed the Agile Development mobile v2 app on a different instance: **a.** Log out by tapping **Settings** > **Log out**. **b.** Tap the add icon ( ) and log in with your new ServiceNow instance address.
New user	**a.** Enter the instance address in one of the following two ways: ▪ Type the instance address in the instance address field. ▪ If your administrator provided you with a QR code, tap the QR icon ( ), and scan the QR code. **b.** Tap **Save and log in**.

2. Log in using your user name and password.
3. Tap the Agile Development v2 icon ( ) to start tracking your sprints, stories, and scrum tasks.

What to do next

Go to

- Managing stories on Agile Development v2 mobile app.
- Managing scrum tasks on Agile Development v2 mobile app.

Managing stories on Agile Development v2 mobile app

View, edit, and update the details of stories assigned for the current sprint on your mobile device.

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On your mobile device, open the Mobile Agent app and navigate to Agile Development v2. Perform the following actions with the role of scrum_product_owner, scrum_team_member, or scrum_master.

Tracking stories on Agile Development v2

From your mobile device, track all stories of an assignment group including the stories that are assigned to you from multiple assignment groups.

All stories of an assignment group

1. In the Sprint Tracking applet, tap **See All**.
2. Tap the name of an assignment group to open it.
3. Tap **All Stories**.

Stories assigned to you from an assignment group

1. In the Sprint Tracking applet, tap **See All**.
2. Tap the name of an assignment group to open it.
3. Tap **My Stories**.

Note:
The **My Stories** tab appears only to the users of role scrum_team_member.

All stories assigned to you

The My Stories applet shows all stories that are assigned to you for the current sprint, from all assignment groups.

- To view all stories as cards, swipe left in the applet.
- To view the list of all stories, tap **See All** on the applet.

Note:
The My Stories applet appears only to the users of role scrum_team_member.

Blocked stories

The Blocked Stories applet shows all stories that are blocked.

- To view all blocked stories as cards, swipe left in the applet.
- To view the list of all blocked stories, tap **See All** on the applet.

Note:
The Blocked Stories applet appears only to the users of role scrum_master and scrum_product_owner.

Swipe left on a story record to find quick actions that enable you to add comments to the story or update its state.

Tap a story to view more details. For example, you can view the epic, acceptance criteria, description, and so on.

Update a story on Agile Development v2

Edit and update the details of your Agile Development 2.0 stories from your mobile device.

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Before you begin

Role required: scrum_product_owner, scrum_team_member, or scrum_master

Procedure

1. Navigate to a story from the Sprint Tracking or My Stories applet.
2. Tap the story to open it.
3. To update the story details:
   a. Tap **Details** and then tap **Edit**.
   b. Edit the fields that you want to update.

      You can edit the fields for state, short description, story points, assigned to, priority, and the sprint to which the story belongs.

   c. Tap **Submit**.

   Note:
   If you update the sprint of the story to a future sprint, this story no longer appears in the app unless that sprint starts. Ensure that the state of the sprint is current.

4. To add work notes or attachments to the story:
   a. Tap **Activity**.
   b. Choose the activity that you want to perform.

      Available options include adding work notes, files, pictures, and so on.

Managing scrum tasks on Agile Development v2 mobile app

View, edit, and update the details of scrum tasks that were created for the stories of the current sprint on your mobile device.

On your mobile device, open the Mobile Agent app and navigate to Agile Development v2. Perform the following actions with the role of scrum_product_owner, scrum_team_member, or scrum_master.

Tracking scrum tasks on Agile Development v2

From your mobile device, track all scrum tasks of an assignment group including the scrum tasks assigned to you from multiple assignment groups.

All scrum tasks of an assignment group

1. In the Sprint Tracking applet, tap **See All**.
2. Tap the name of an assignment group to open it.
3. Tap **All Scrum Tasks**.

Scrum tasks assigned to you from an assignment group

1. In the Sprint Tracking applet, tap **See All**.
2. Tap the name of an assignment group to open it.
3. Tap **My Scrum Tasks**.

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Note:
The **My Scrum Tasks** tab appears only to the users of role scrum_team_member.

All scrum tasks assigned to you

The My Scrum Tasks applet shows all scrum tasks that are assigned to you for the current sprint, from all assignment groups.

- To view all scrum tasks as cards, swipe left in the applet.
- To view the list of all scrum tasks, tap **See All** on the applet.

Note:
The My Scrum Tasks applet is visible only to the users of role scrum_team_member.

Swipe left on a scrum task record to find quick actions that enable you to add comments to it or update its state.

Tap a scrum task to view more details such as the task type, story, assigned to, description, activity, and so on.

Create a scrum task on Agile Development v2

Add a scrum task for a story from the mobile app.

Before you begin

Role required: scrum_product_owner, scrum_team_member, or scrum_master

Procedure

1. Navigate to a story from the Sprint Tracking or My Stories applet.
2. Tap which story you want to add a new scrum task to.
3. Tap the more options icon (••• on iOS) or ( on Android) and tap **New Scrum Task**.
4. On the form, fill in the fields.

New scrum task mobile form

Field	Description
Short Description	Brief description of the scrum task.
Description	Detailed description of the scrum task.
Planned Hours	Estimated number of hours to complete the task. A typical scrum task takes between 4 and 12 hours. If the task requires more than 12 hours, consider breaking it down into multiple tasks.
Priority	Priority for the task.
Type	Type of work involved.
State	Current state of the scrum task. The default state for a new scrum task is **Draft**.

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5. Tap **Submit**

> **Note:**
> **Submit** appears only if all the required fields are filled.

Update a scrum task on Agile Development v2

Edit and update the details of the scrum tasks of your stories from your mobile device.

Before you begin

Role required: scrum_product_owner, scrum_team_member, or scrum_master

Procedure

1. Navigate to a scrum task from the Sprint Tracking or My Scrum Tasks applet.
2. Tap the scrum task which you want to update the details of.
3. To update the scrum task details:
   a. Tap **Details** and then tap **Edit**.
   b. Edit the fields that you want to update.

      You can edit the fields of state, task short description, description, assigned to, actual hours, and priority of the scrum task.

   c. Tap **Submit**.
4. To add work notes or attachments to the scrum task:
   a. Tap **Activity**.
   b. Choose the activity that you want to perform.

      Available options include adding work notes, files, pictures, and so on.

Scaled Agile Framework (SAFe)

The ServiceNow® Scaled Agile Framework (SAFe) application helps you apply lean and agile principles to your large enterprise enabling you to develop and deliver software products with fewer defects in the shortest viable lead time.

Scaled Agile Framework application overview. Approximately three minutes long.

SAFe overview

- Provides a broader, high-level perspective as well as the ability to manage development processes throughout all levels of your organization.
- Facilitates collaboration and streamlines the planning and monitoring of activities across business units, departments, and teams.

> **Note:**
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Configurations of SAFe

ServiceNow provides applications that support two different configurations of SAFe: Essential SAFe and Portfolio SAFe. The sections below explain the features of each configuration, and will help you choose the right configuration for your organization.

Essential SAFe

With Essential SAFe, you can apply lean and agile principles to your Agile Release Trains and teams, and develop and deliver work with fewer defects in the shortest viable lead time.

Portfolio SAFe

With Portfolio SAFe, you can align your organizational goals and strategies with your portfolios, and apply lean and agile principles to seamlessly manage and deliver your portfolio work.

Domain separation and Scaled Agile Framework (SAFe)

Domain separation is supported in the Scaled Agile Framework (SAFe) application. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

Related topics

Domain separation for service providers

Business stakeholder role for Essential SAFe and Portfolio SAFe

Use the business stakeholder role to read and retrieve data from any table of the Essential SAFe and Portfolio SAFe applications to generate reports.

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Important:

Starting with the Xanadu release, Portfolio SAFe, Essential SAFe, Performance Analytics Content Pack for Essential SAFe, Work Progress Status for SAFe, Agile - Scaled Agile Framework - Unified Backlog, and Read only roles for SAFe plugins are being prepared for future deprecation. These plugins will be hidden and can no longer be activated on new instances but will continue to be supported. Enterprise Agile Planning in Strategic Planning provides the latest experience for this functionality.

For more information on the deprecation process and its impact, see the Application/Plugin Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

When you activate the Business Stakeholder plugin (com.snc.business_stakeholder) in your ServiceNow instance, the Read only roles for SAFe plugin (com.snc.sdlc.safe_read_roles) is also activated. This plugin provides a business stakeholder role (sn_safe_read) with which you can access all the tables of Essential SAFe and Portfolio SAFe applications. You can assign this role to any user in your organization who is a business stakeholder.

Plugin availability

If you are a new customer, the Read only roles for SAFe plugin (com.snc.sdlc.safe_read_roles) is activated on zBoot. However, the business stakeholder role (sn_safe_read) is available only when you activate the Agile - Scaled Agile Framework - Essential SAFe plugin (com.snc.sdlc.safe) or Agile - Scaled Agile Framework - Portfolio SAFe plugin (com.snc.sdlc.portfolio_safe).

If you are an upgrade customer, you must manually activate the Read only roles for Essential SAFe and Portfolio SAFe plugins (com.snc.sdlc.safe_read_roles).

SAFe tables accessible by users with the business stakeholder role

When the read-only roles for SAFe plugin (com.snc.sdlc.safe_read_roles) is active in your ServiceNow instance along with either the Essential SAFe plugin (com.snc.sdlc.safe) or Portfolio SAFe plugin (com.snc.sdlc.portfolio_safe), the user with the business stakeholder role (sn_safe_read) has read access to the following tables.

Essential SAFe tables

Table	Description
SAFe epic [sn_safe_epic]	Information about epics.
SAFe feature [sn_safe_feature]	Information about features.
Agile Release Train [sn_safe_program]	Information about ART.
Program Increment [sn_safe_program_increment]	Information about program increments. Stores the predictability measure data from PI objectives.
SAFe ART team [sn_safe_program_m2m_group]	Relationships between groups and ART.

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Essential SAFe tables (continued)

Table	Description
SAFe ART Member [sn_safe_program_member]	Information about members within an ART.
SAFe ART Sprint [sn_safe_program_sprint]	Sprint schedules of teams within the ART.
SAFe ART VTB Board [sn_safe_program_vtb_board]	Records displayed on the ART level, Board tab.
SAFe Scrum Task [sn_safe_scrum_task]	Information about SAFe scrum tasks.
SAFe Sprint [sn_safe_sprint]	Information about sprints.
SAFe Story [sn_safe_story]	Information about stories.
SAFe Team VTB Board [sn_safe_team_vtb_board]	Records displayed on the Team level, Board tab.
SAFe PI Objectives [sn_safe_pi_objective]	Stores the SAFe PI objectives.
SAFe team predictability measure [sn_safe_pi_m2m_group]	Stores the business value achieved per team from PI objectives which is used for team-level predictability measure data.

Portfolio SAFe tables

Table	Description
SAFe epic [sn_safe_epic]	Information about epics.
SAFe feature [sn_safe_feature]	Information about features.
Agile Release Train [sn_safe_program]	Information about ART.
Program Increment	Information about program increments.

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Portfolio SAFe tables (continued)

Table	Description
[sn_safe_program_increment]	
SAFe ART team [sn_safe_program_m2m_group]	Relationships between groups and ART.
SAFe ART Member [sn_safe_program_member]	Information about members within an ART.
SAFe ART Sprint [sn_safe_program_sprint]	Sprint schedules of teams within the ART.
SAFe ART VTB Board [sn_safe_program_vtb_board]	Records displayed on the ART level, Board tab.
SAFe Scrum Task [sn_safe_scrum_task]	Information about SAFe scrum tasks.
SAFe Sprint [sn_safe_sprint]	Information about sprints.
SAFe Story [sn_safe_story]	Information about stories.
SAFe PI Objectives [sn_safe_pi_objective]	Stores the SAFe PI objectives.
SAFe team predictability measure [sn_safe_pi_m2m_group]	Stores the business value achieved per team from PI objectives which is used for team-level predictability measure data.
Portfolios [pm_portfolio]	Information about portfolios.
Portfolio SAFe VTB board [sn_portfolio_safe_vtb_board]	Records displayed on the portfolio level, Board tab.
SAFe Team VTB Board [sn_safe_team_vtb_board]	Records displayed on the Team level, Board tab.

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Essential SAFe

With Essential SAFe, you can apply lean and agile principles to your Agile Release Trains and teams, and develop and deliver work with fewer defects in the shortest viable lead time.

This video explains how to use Essential SAFe features

Essential SAFe is the most basic configuration of SAFe that works in two levels for both product managers and team members. At the Agile Release Train (ART) level, product managers can capture and prioritize features in a centralized backlog, and monitor the progress of features in a visual task board.

At the Team level, team members can implement stories that are decomposed from features. To learn more about the levels, see the SAFe Board section below.

To start using the features of Essential SAFe, install the Agile - Scaled Agile Framework - Essential SAFe plugin (com.snc.sdlc.safe).

SAFe Board

The table below provides an overview of how you can access the key levels of Essential SAFe on SAFe Board.

Level	Description
Agile Release Train (ART)	As a product manager, you can plan and monitor activities across teams within an ART by accessing the **ART** level on the **Scaled Agile Framework (SAFe)** > **SAFe Board**. In addition, you can: • manage the ART backlog in a centralized location. • define a program increment and identify the features that need to be completed within that program increment. • perform big room planning. • track all the features of the ART and view their transition from one state (lane) to another, in a visual task board.
Team	As a team member, you can plan and monitor activities within the team by accessing the **Team** level on the **Scaled Agile Framework (SAFe)** > **SAFe Board**. In addition you can: • manage the team backlog in a centralized location. • streamline sprint planning and completion activities. • track all stories and view their transition from one state (lane) to another, in a visual task board.

Components installed with Essential SAFe

Several types of components are installed with activation of the Agile - Scaled Agile Framework - Essential SAFe plugin (com.snc.sdlc.safe), including tables and user roles.

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Roles installed

Role	Description	Contains roles
SAFe admin [safe_admin]	• Edits, creates, and deletes SAFe ART, epics, features, stories, and program increments. • Has read-only access to SAFe teams.	• safe_art_user • safe_scrum_master • safe_product_owner
SAFe scrum product owner [safe_product_owner]	• Maintains the team backlog and can edit, create, and delete SAFe stories. • Has access to create PI objectives. • Has read-only access to SAFe ART, teams, epics, and features. • Has read-only access to SAFe program increments.	safe_story_creator
SAFe ART user [safe_art_user]	• Maintains the ART backlog and can edit, create, and delete SAFe epics, features, stories, and program increments. • Has access to create PI objectives. • Edits SAFe teams. • Has create and edit access to SAFe ART.	safe_story_creator
SAFe scrum master [safe_scrum_master]	• Edits, and deletes SAFe stories. • Has access to create PI objectives. • Edits SAFe teams. • Has read-only access to SAFe ART, epics, features, and program increments. • Has access to the triage board when the Scaled Agile Framework — Unified Backlog plugin (com.snc.sdlc.safe.multi_task) is activated	safe_story_creator
SAFe scrum user [safe_scrum_user]	Can view all elements of SAFe, but cannot create, edit, or manage records of any type.	None
SAFe scrum story creator [safe_story_creator]	• Edits, creates, and deletes SAFe stories. • Has read-only access to SAFe ART, teams, epics, features, and program increments.	safe_story_editor

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Role	Description	Contains roles
SAFe scrum story editor [safe_story_editor]	• Arranges stories within the team backlog using the drag and drop feature. • Edits SAFe stories. • Has read-only access to SAFe ART, teams, epics, features, and program increments.	• safe_scrum_user • rm_scrum_task_admin

Tables installed

Table	Description
SAFe epic [sn_safe_epic]	Information about epics.
SAFe feature [sn_safe_feature]	Information about features.
Agile Release Train [sn_safe_program]	Information about ART.
Program Increment [sn_safe_program_increment]	Information about program increments. Stores the predictability measure data from PI objectives.
SAFe ART team [sn_safe_program_m2m_group]	Relationships between groups and ART.
SAFe ART Member [sn_safe_program_member]	Information about members within an ART.
SAFe ART Sprint [sn_safe_program_sprint]	Sprint schedules of teams within the ART.
SAFe ART VTB Board [sn_safe_program_vtb_board]	Records displayed on the ART level, Board tab.
SAFe Scrum Task [sn_safe_scrum_task]	Information about SAFe scrum tasks.
SAFe Sprint [sn_safe_sprint]	Information about sprints.
SAFe Story [sn_safe_story]	Information about stories.

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Table	Description
SAFe Team VTB Board [sn_safe_team_vtb_board]	Records displayed on the Team level, Board tab.
SAFe PI Objectives [sn_safe_pi_objective]	Stores the SAFe PI objectives.
SAFe team predictability measure [sn_safe_pi_m2m_group]	Stores the business value achieved per team from PI objectives which is used for team-level predictability measure data.

Quick start tests for Essential SAFe

Validate that Essential SAFe still works after you make any configuration change such as apply an upgrade or develop an application. Copy and customize these quick start tests to pass when using your instance-specific data.

Essential SAFe quick start tests require activating the Agile - Scaled Agile Framework - Essential SAFe plugin (com.snc.sdlc.safe) and the Agile - Scaled Agile Framework - Essential SAFe - ATF Tests plugin (com.snc.sdlc.safe.atf).

Essential SAFe test suites

Test	Description	Release version
Essential SAFe: Feature tests	Verify feature global rank updates.	Madrid

Essential SAFe: Feature tests	For a SAFe feature, verify that:
	• Actual start date is populated after the state is changed to Implementation, Validation on Staging, or Deployment.
	• Actual end date is populated after the state is changed to **Released** or **Cancelled**.
	• Active flag is set to the appropriate value:
	  ○ **False**, if the state is changed to **Released** or **Cancelled**.
	  ○ **True**, for all other states.
		Orlando

Essential SAFe: Feature tests	If the PPM Standard plugin (com.snc.financial_planning_pmo) is active, verify that a Demand can be converted to a SAFe feature using the **Create SAFe**	Quebec

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Essential SAFe test suites (continued)

Test	Description	Release version
	Feature related link on the Demand form. For more information on how to create an SAFe feature from a demand, see Create an artifact from a demand.	
Essential SAFe: Program increment tests	Verify program increment date overlapping.	Madrid
Essential SAFe: Sprint tests	Verify the generation of ART sprints and team sprints as well as updates to sprint points and dates.	Madrid

Essential SAFe: Sprint tests	Verify that any update to the **Group capacity** field of the assignment group results in the following changes to the **Group capacity** field of the various sprints associated with this assignment group:
	• For the sprints that are in the **Draft** or **Planning** states:
	  ○ The group capacity is updated to the new value.
	  ○ The **Group capacity** field is editable.
	• For the sprints in the **Current**, **Complete**, or **Cancelled** states:
	  ○ The group capacity remains the old value.
	  ○ The **Group capacity** field is read-only.
	
	For the sprints in the **Draft** or **Planning** state, you can individually edit the group capacity of the sprint anytime later. This would not change the group capacity of the assignment group associated with this sprint.
		Paris

Essential SAFe: Story tests	Verify story global rank updates.	Madrid

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Essential SAFe test suites (continued)

Test	Description	Release version
Essential SAFe: Story tests	Verify that active flag of the SAFe story is set to the appropriate value: • **False**, if the state of the state is changed to Completed or Cancelled. • True, for all other states.	Orlando
Essential SAFe: Story tests	Verify that adding, estimating, removing, deleting, updating, or cancelling a SAFe story updates the SAFe feature-level and then the epic-level roll-ups correctly.	Orlando
Essential SAFe: Story tests	Verify that adding, updating, or deleting the feature on a SAFe story updates the Epic field on the SAFe story form.	Orlando
Essential SAFe: Story tests	If the PPM Standard plugin (com.snc.financial_planning_pmo) is active, verify that a Demand can be converted to a SAFe story using the **Create SAFe Story** related link on the Demand form. For more information on how to create a SAFe story from a demand, see Create an artifact from a demand.	Quebec
Essential SAFe: Team tests	Verify team association with an ART.	Madrid
Essential SAFe: Epic tests	For a SAFe epic, verify that: • Actual start date is populated after the state is changed to **Implementation**. • Actual end date is populated after the state is changed to **Complete**. • Active flag is set to the appropriate value:	Orlando

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Essential SAFe test suites (continued)

Test	Description	Release version
	○ **False**, if the state is changed to **Released** or **Cancelled** states. ○ **True**, for all other states.	
Essential SAFe: Epic tests	If the PPM Standard plugin (com.snc.financial_planning_pmo) is active, verify that a Demand can be converted to a SAFe epic using the **Create SAFe Epic** related link on the Demand form. For more information on how to create a SAFe epic agile from a demand, see Create an artifact from a demand.	Quebec
Essential SAFe: Program PI Objective tests	Verify the functionality of creating and updating PI objectives • Verify that you can create a program increment-level objective • Verify that you can update the created PI objective with the planned business value (PBV) and actual business value (ABV) • Verify that the percentage of business value achieved is computed as the percentage of ABV complete, for only the committed PI objectives, as compared to the PBV of the program in the PI	Rome
Essential SAFe: Team PI Objective tests	Verify the functionality of creating and updating team PI Objectives • Verify that you can create a team-level PI objective • Verify that you can update the created PI objective with the planned business value (PBV) and actual business value (ABV)	Rome

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Essential SAFe test suites (continued)

Test	Description	Release version
	• Verify that the percentage of business value achieved is computed as the percentage of ABV complete, for only the committed PI objectives, as compared to the PBV of the team in the PI	

Related topics

Quick start tests

SAFe entities

Learn about the various SAFe entities that are used to successfully plan, track, and deliver your software products.

Epic

Epic in SAFe is the largest unit of work, which can be continuously worked through multiple program increments. Epic captures business hypotheses and is prioritized and assessed using the WSJF (Weighted Shortest Job First is used to prioritize and sequence jobs to produce optimum business value) score.

An epic is further decomposed into features for implementation and delivery by SAFe ARTs.

Feature

A SAFe feature is equivalent to an epic in Agile Development. It must be small enough for completion within a program increment cycle. It is prioritized and sequenced in an ART backlog based on its global ranking. A feature is further decomposed into user stories for implementation and delivery by SAFe teams.

Story

A SAFe story is a brief statement encapsulating a product requirement or business case written in user-centric language. A story must be small enough for completion in one sprint. The estimated effort required to complete a story is measured in story points. More points are assigned to a story requiring more effort. Story points are arbitrary measurements of the effort (not necessarily the time) required to complete a story, based on the estimates from the SAFe team members.

Agile Release Train

Agile Release Train (ART) comprises a set of teams working towards a single solution.

Program Increment

A program increment is set period during which teams in an ART collaborate and produce to achieve agreed-upon goals. A program increment in SAFe is similar to a sprint in Agile Development, typically spanning 8–12 weeks. The most common form of program increment comprises four development sprints followed by one innovation and planning sprint.

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SAFe team

SAFe team is an autonomous, cross-functional team containing members possessing different skill-sets who work in collaboration to achieve a common goal.

A user with the safe_scrum_master or safe_art_user role can create a SAFe team. You can assign these teams to SAFe work items such as stories, epics, and features.

Once a SAFe team is created, you can add members to it.

- New customers: System administrator can add members to the team.
- Existing customers: A user with the safe_scrum_master or safe_art_user role can add members to your SAFe team.

Note:

You can restrict this function just to the system administrator by creating the *safe.disallow_scrum_add_group_member* property and setting it to **true**.

For information on how to create a property, see Add a system property.

Sprint

Program Increments in SAFe are further segmented into sprints for teams involved in it, and are measured in terms of weeks.

Define an epic in SAFe

Create an epic within SAFe. An epic is the largest unit of work that has one common objective such customer request, or business requirement. An epic is further decomposed into features for implementation and delivery by SAFe agile release trains (ARTs).

Before you begin

Role required: safe_art_user or safe_admin

Procedure

1. Create an epic using either of the following options.

2. In the form, fill in the fields:

SAFe Epic Form

Field	Description
Number	System-generated number for the epic.
Enabler	Check box identifying the epic as an enabler. Enablers do not add direct business value but help lay a foundation for future work. For example, an enabler epic might be an investigation into the architecture used to build features.
State	State of the epic: ○ **Funnel**: Created from **Scaled Agile Framework (SAFe)** > **Epic**. ○ **Review**: Under review considering parameters like WSJF score and WIP limited.

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Field	Description
	○ **Analysis**: Approved or rejected based on parameters like WSJF score refinement, cost estimation, alternatives, and WIP limited. ○ **Backlog**: Approved and assigned to an ART. In this state, the ART level user segments the epic into features. ○ **Implementation**: Epic is being implemented. ○ **Done**: Implementation is complete.
Color	Color that you attribute to the epic. Epic colours help you visually identify and group features by their epic on the ART's backlog page of the SAFe board.
WSJF Score	Weighted Shortest Job First (WSJF) score is used to prioritize and sequence jobs to produce optimum business value. A job with the highest WSJF score receives the highest priority for implementation. A job can refer to an epic, feature, or any business capability.
Short description	Brief description of the epic.
Description	A more detailed description of the epic.

Weighted shortest job first score section of the Epic form

Field	Description
User-business Value	Business value of the job based on parameters like impact on revenue or other solutions in the market offering similar capabilities.
Time criticality	Impact on the business when deadlines are missed. For example, how projected revenue gains are reduced over time when deadlines are shifted.
Risk reduction	Analyze how much risk this epic can help you avoid by answering questions such as: ○ Does the job add value to the business in other ways? ○ Does the job bring in new business opportunities? ○ Does the job reduce the risk for a future delivery?
Job size	Estimated duration for completion of the job.
Total story count	Number of active stories in the epic. This field is not displayed by default. Configure the field in the form layout.
Completed count	Number of stories that have been completed in the epic. This field is not displayed by default. Configure the field in the form layout.

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Field	Description
Percent complete by count	Percentage of work that has been completed in the epic. Value is calculated by story count. This field is not displayed by default. Configure the field in the form layout.
Total estimate	Sum of estimates of all the active stories in the epic. This field is not displayed by default. Configure the field in the form layout.
Completed estimate	Sum of estimates of all the completed stories in the epic. This field is not displayed by default. Configure the field in the form layout.
Percent complete by estimate	Percentage of work that has been completed in the epic. Value is calculated by points (estimate) of stories in the epic. This field is not displayed by default. Configure the field in the form layout.
Missing estimates	Number of stories without estimation points. This field is not displayed by default. Configure the field in the form layout.
Top program	Program mapped to the SAFe work enabling top-down hybrid planning. All the active child SAFe features of this epic are automatically associated with the selected program. This field is visible in the SAFe view of the epic form if you activate the PPM Standard plugin (com.snc.financial_planning_pmo).

3. Fill in the Planning section if you want to create benefit plans for the epic.
   This section is available when the Benefit view is selected.

Planning section of the Epic form

Field	Description
Planned start date	Projected start date for the epic. The planned start date can be the current date or a future date.
Planned end date	Projected end date for the epic. The planned end date must be after the planned start date.
Planned benefit	Benefit value that is rolled up from the benefit breakdown.
Actual start date	Actual start date for the epic. The actual start date can be on or before the planned start date.

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Field	Description
Actual end date	Actual end date for the epic. The actual end date can be before the planned start date but not before the actual start date.
Actual benefit	Actual benefit value that is rolled up from the actual benefit in the benefit breakdown.

4. Click **Submit**.

Create a monetary benefit plan for an epic

Epic benefit plans capture the potential benefits accrued by the epic when the epic is executed. Create a monetary benefit plan to specify the estimated benefit in a category spanning one or more fiscal periods.

Before you begin

Role required: safe_product_owner, safe_scrum_master, or safe_admin

About this task

The monetary benefit plan breakdown records are automatically created when you save the benefit plan.

Procedure

1. Navigate to **All** > **Agile Development** > **Epics**.
2. Open the required epic.
3. Click the hamburger icon ( ) and navigate to **View** > **Benefit**.
4. On the form, fill in the fields in the Planning section.
   This section is available when the Benefit view is selected.

Planning section of the Epic form

Field	Description
Planned start date	Projected start date for the epic. The planned start date can be the current date or a future date.
Planned end date	Projected end date for the epic. The planned end date must be after the planned start date.
Planned benefit	Benefit value that is rolled up from the benefit breakdown.
Actual start date	Actual start date for the epic. The actual start date can be on or before the planned start date.
Actual end date	Actual end date for the epic. The actual end date can be before the planned start date but not before the actual start date.
Actual benefit	Actual benefit value that is rolled up from the actual benefit in the benefit breakdown.

5. Save the record.
6. In the Monetary Benefit Plans related list, click **New**.
7. On the form, fill in the fields.

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Benefit Plan form

Field	Description
Name	Descriptive name of the benefit plan.
Work	Epic to which the benefit plan belongs.
Sponsor	Sponsor for the epic.
Category	Type of benefit: ○ **Hard**: Benefits that can be measured in terms of revenue. ○ **Soft**: Benefits that are measured in terms of value.
Sub category	Sub-categories of hard and soft benefits. The selection in **Category** field determines the selections available in this field.
Benefit type	Type of benefit. Select **Monetary benefits**.
Offset type	Field to indicate when the benefits start realizing. Select any of the following options: ○ **None**: The default value is None. When you select **None**, you need to manually enter the benefit plan start and end fiscal periods. ○ **Milestone**: After completion of a milestone. ○ **Start Date**: At the start of the epic. ○ **End Date**: After the epic ends. If the value in the selected offset type changes, the benefit plan start date shifts accordingly. For example, if the offset type is set to **End Date** and the end date of the epic changes, the benefit plan start date shifts to align with the new end date of the epic.
Milestone	Epic milestones to which the benefit plan belongs. The field appears if you select **Milestone** in the **Offset type** field.
Milestone start date	Start date of the selected milestone. The field appears if you select **Milestone** in the **Offset type** field.
Work start date	Start date of the epic. The field appears if you select **Start Date** in the **Offset type** field.
Work end date	End date of the epic. The field appears if you select **End Date** in the **Offset type** field.
Offset	Number of periods before or after the offset type when the benefit plan starts. For example, if the offset type is selected as **End Date** and the offset is -2, the benefit plan is two periods prior to the epic end date. If the epic end date shifts, the benefit plan start date shifts to two periods prior to the new epic due date.
Duration in periods	The length, in periods, of the benefit plan.
Start fiscal period	Starting fiscal period. Populated based on the value in the Offset field relative to the selected **Milestone**, **Work start date**, or **Work end date**, and **Duration in period** values. The field is editable if you select **None** in the **Offset type** field.

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Field	Description
	When you change the start fiscal period, the associated benefit breakdown values also change.
End fiscal period	Ending fiscal period. Populated based on the value in the Offset field relative to the selected **Milestone**, **Work start date**, or **Work end date**, and **Duration in period** values. The field is editable if you select **None** in the **Offset type** field. When you change the end fiscal period, the associated benefit breakdown values also change.
Associated benefit	Non-monetary benefit that is associated to this monetary benefit plan.

Financials section of the Benefit Plan form

Field	Description
Entered benefit	Benefit incurred from the epic specified in terms of entered currency.
Entered currency	Currency in which you want the benefit plan to be created.
Functional currency	Currency that is obtained from the **glide.system.locale** property.
Total planned benefit	Estimated amount of potential benefit of the epic.
Benefit in functional currency	Benefit incurred from epic in terms of functional currency. The value in this field changes if the **Entered currency** is different from the functional currency.
Actual benefit	Actual benefit that is incurred from the epic. This value is rolled up from the **Actual benefit** field of all the benefit plan breakdowns.
Recurring	Option to indicate that the benefit is recurring for all the fiscal periods in the benefit plan.

8. Click **Submit**.

What to do next

On the Benefit Plan form, view the benefit breakdown by fiscal period in the Monetary Benefit Plan Breakdowns related list.

Update a monetary benefit plan breakdown for an epic

Update a monetary benefit plan breakdown record that specifies the estimated and actual benefits, at a granular level, for specific fiscal periods.

Before you begin

Role required: safe_product_owner, safe_scrum_master, or safe_admin

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Procedure

1. Navigate to **All** > **Agile Development** > **Epics**.
2. Open the required epic.
3. Click the hamburger icon ( ) and navigate to **View** > **Benefit**.
4. Click the Monetary Benefit Plans related list.
5. Open the required monetary benefit plan.
6. In the Monetary Benefit Plan Breakdowns related list, click the information icon for a monetary benefit plan breakdown.
7. Click **Open Record**.
8. On the Monetary Benefit Plan Breakdown form, view and update the enabled fields.
9. Click **Update**.

Create a non-monetary benefit plan for an epic

Epic benefit plans capture the potential non-financial benefits accrued by the epic when the epic is executed. Create a non-monetary benefit plan to specify the estimated benefit in a category spanning one or more fiscal periods.

Before you begin

Role required: safe_product_owner, safe_scrum_master, or safe_admin

About this task

The non-monetary benefit plan breakdown records are automatically created when you save the benefit plan by selecting **Automatic** or **Manual** in the **Breakdown Type** field. The non-monetary benefit plan breakdown records specify the estimated and actual non-financial benefits at a granular level for specific fiscal periods, such as FY16: April and FY16: May. The Non-monetary Benefit Plan Breakdowns related list shows the aggregated benefits for estimated and actual non-financial benefits for each fiscal period for the epic.

Procedure

1. Navigate to **All** > **Agile Development** > **Epics**.
2. Open the required epic.
3. Click the hamburger icon ( ) and navigate to **View** > **Benefit**.
4. On the form, fill in the required fields in the Planning section.
   This section is available when the Benefit view is selected.

Planning section of the Epic form

Field	Description
Planned start date	Projected start date for the epic. The planned start date can be the current date or a future date.
Planned end date	Projected end date for the epic. The planned end date must be after the planned start date.
Planned benefit	Benefit value that is rolled up from the benefit breakdown.

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Field	Description
Actual start date	Actual start date for the epic. The actual start date can be on or before the planned start date.
Actual end date	Actual end date for the epic. The actual end date can be before the planned start date but not before the actual start date.
Actual benefit	Actual benefit value that is rolled up from the actual benefit in the benefit breakdown.

5. Save the record.
6. Click the Non-monetary Benefit Plans related list.
7. To create a non-monetary benefit plan, click **New**.
8. On the form, fill in the fields.

Benefit Plan form

Field	Description
Name	Descriptive name of the benefit plan.
Work	Epic to which the benefit plan belongs.
Sponsor	Sponsor for the epic.
Category	Type of benefit: ○ **Hard**: Benefits that can be measured in terms of revenue. ○ **Soft**: Benefits that are measured in terms of value.
Sub category	Subcategories of hard and soft benefits. The value of the **Category** field determines the choices available in this field.
Benefit type	Type of benefit. Select **Non-monetary benefits**.
Offset type	Field to indicate when the benefits start to be realized. Select any of the following options: ○ **None**: The default value is None. When you select **None**, you must manually enter the benefit plan start and end fiscal periods. ○ **Milestone**: After completion of a milestone. ○ **Start Date**: At the start of the epic. ○ **End Date**: After the epic ends. If the value in the **Offset type** field changes, the benefit plan start date shifts accordingly. For example, if the **Offset type** field is set to **End Date** and the end date of the epic changes, the start date of the benefit plan shifts to align with the new end date of the epic.
Milestone	Epic milestones to which the benefit plan belongs. This field appears only when **Milestone** is selected from the **Offset type** field.
Milestone start date	Start date of the selected milestone. This field appears only when **Milestone** is selected from the **Offset type** field.

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Field	Description
Work start date	Start date of the epic. This field appears only when **Start Date** is selected from the **Offset type** field.
Work end date	End date of the epic. This field appears only when **End Date** is selected from the **Offset type** field.
Offset	Number of periods before or after the offset type when the benefit plan starts. For example, if the offset type is selected as **End Date** and the offset is -2, the benefit plan is two periods prior to the epic end date. If the epic end date changes, the benefit plan start date shifts to two periods prior to the new epic due date.
Duration in periods	The length, in periods, of the benefit plan.
Start fiscal period	Starting fiscal period. This field is populated based on the value in the **Offset** field relative to the selected **Milestone**, **Work start date**, or **Work end date**, and **Duration in periods** field values. This field is editable if you select **None** in the **Offset type** field. When you change the start fiscal period, the associated benefit breakdown values also change.
End fiscal period	Ending fiscal period. This field is populated based on the value in the **Offset** field relative to the selected Milestone, Project or Demand start date, or Project or Demand end date, and Duration in period values. This field is editable if you select **None** in the **Offset type** field. When you change the end fiscal period, the associated benefit breakdown values also change.
Associated benefit	Monetary benefit that is associated to this non-monetary benefit plan.

Non-monetary Details section of the Benefit form

Field	Description
Measure	Type of measure for the non-monetary benefit plan. The measure types are Count, Percentage, Hours, Days, and Score. Select the option **Yes/No** to track the benefits that are not quantifiable. When this option is selected, the only field available is **Benefits achieved**. You can select the check box to indicate that the benefits have been achieved.
Non-monetary entered benefit	Estimated value of the potential benefit. Any change in the planned benefit in the benefit plan updates the associated benefit breakdown values for future fiscal periods only.

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Field	Description
Non-monetary planned benefit	Benefit value that is rolled up from the benefit breakdown.
Benefits achieved	Option to indicate if the benefit is achieved.
Breakdown type	Type of breakdown creation when you save the benefit plan. ○ **None**: No breakdowns are created. ○ **Automatic**: A Non-monetary Benefit Plan Breakdowns record is created automatically with data. The breakdown is calculated linearly. ○ **Manual**: A Non-monetary Benefit Plan Breakdown record is created automatically but without data in the **Entered benefit** column.
Aggregation mode	Determines how the roll-up happens from breakdowns to the benefit plan and updates the values in the **Non-monetary planned benefit** and **Non-monetary actual benefit** fields. ○ **Sum**: Aggregates data from all breakdowns. ○ **Average**: Average value from all breakdowns. ○ **Most recent**: Recent breakdown value. ○ **Max**: Maximum value among the breakdowns. ○ **Min**: Minimum value among the breakdowns.
Non-monetary actual benefit	Actual benefit value that is rolled up from the actual benefit in the non-monetary benefit plan breakdown.

9. Click **Submit**.

What to do next

- On the Benefit Plan form, view the benefit breakdown by fiscal period in the Non-monetary Benefit Plan Breakdowns related list.
- Associate monetary and non-monetary benefit plans, so that you can capture the potential benefits (financial and non-financial) accrued by the epic for the hybrid benefit plans.

Update a non-monetary benefit plan breakdown for an epic

Update a non-monetary benefit plan breakdown record that specifies the estimated and actual benefits, at a granular level, for specific fiscal periods.

Before you begin

Role required: safe_product_owner, safe_scrum_master, or safe_admin

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Procedure

1. Navigate to **All** > **Agile Development** > **Epics**.
2. Open the required epic.
3. Click the hamburger icon ( ) and navigate to **View** > **Benefit**.
4. Click the Non-monetary Benefit Plans related list.
5. Open the required non-monetary benefit plan.
6. In the Non-monetary Benefit Plan Breakdowns related list, click the information icon for a non-monetary benefit plan breakdown.
7. Click **Open Record**.
8. On the Non-monetary Benefit Plan Breakdown form, view and update the enabled fields.
9. Click **Update**.

Associate monetary and non-monetary benefit plans

Associate monetary and non-monetary benefit plans, so that you can capture the potential benefits (financial and non-financial) accrued by the epic for the hybrid benefit plans.

Before you begin

Role required: safe_product_owner, safe_scrum_master, or safe_admin

About this task

You can associate a monetary benefit plan with a non-monetary benefit plan and vice versa.

Note:
When you delete a benefit plan, any relationship with the associated benefit plan is also removed.

Procedure

1. Navigate to **All** > **Agile Development** > **Epics**.
2. Open the required epic.
3. Select **View** > **Benefit** from the Additional actions menu ( ).
4. Click the Monetary Benefit Plans or Non-monetary Benefit Plans related list.
5. Click the information iconfor a benefit plan that you want to associate.
6. Click **Open Record**.
7. Associate a monetary or non-monetary benefit plan.
8. Click **Save**.

Result

The selected benefit plan is associated with another plan.

What to do next

Click the **View Associated benefit plan** related link to view the associated benefit plan.

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Generate labor costs for epics

View the labor cost expenses based on the resource assignments for your epics.

Before you begin

- The epic should have the resource assignments.
- Role required: sn_spm_financial_user

Procedure

1. Navigate to **All** > **Agile Development** > **Epics**.
2. Select the required epic.
3. Select the **Generate labor costs** related link.
   Refresh the page to view generated labor costs in the Cost Plan related list.

Define a feature in SAFe

Create a feature in SAFe and break it down into smaller user stories for implementation and delivery by SAFe teams.

Before you begin

Role required: safe_art_user or safe_admin

Procedure

1. Create a feature using any of the following options.
   You can also convert an active SAFe story into a SAFe feature. For details, see Related links and lists for a SAFe story.
2. On the form, fill in the fields.

SAFe Feature Form

Field	Description
Number	System-generated number for the feature.
Enabler	Option that identifies a feature as an enabler. An enabler does not bring any business value but helps in laying the foundation for future work. For example, you can use an enabler to investigate the architecture that is used to build stories.
Color	Color that you attribute to the feature. Feature colors help you visually identify and group stories by their feature on the team's backlog page of the SAFe board. This color also appears as a filled circle on the SAFe story cards on the SAFe PI planning board so that you can identify its feature.
WSJF score	Weighted Shortest Job First (WSJF) score that you use to prioritize and sequence jobs to produce an optimum business value. A job with the highest WSJF score receives the highest priority for implementation. A job can be an epic, feature, or any business capability.
State	State of the feature. Select one of the following:

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Field	Description
	○ **Funnel**: In this state, you can create features from approved ideas. ○ **Analysis**: In this state, the product management team reviews the features and considers the acceptance criteria, benefit hypothesis, technical feasibility, and scope estimates. ○ **Backlog**: In this state, you can prioritize approved features and assign them to an ART. ○ **Implementation**: In this state, you can break down a feature into stories that you can later assign to a team. ○ **Validation on staging**: In this state, you can integrate the feature in the system and present it to the product management team for approval and feedback. ○ **Deployment**: In this state, the deployment testing of feature is complete. ○ **Released**: In this state, you are ready to release the feature to the end users and assess the benefit hypotheses. ○ **Cancelled**: In this state, a feature has been canceled.
SAFe epic	Epic to which the feature belongs.
Agile release train	Agile release train to which the feature belongs.
Program increment	Program increment in which the feature is scheduled for completion.
SAFe team	Team that is primarily responsible for the delivery of the feature.
Short description	Brief description of the feature.
Description	Detailed description of the feature.
Work notes	Work notes that indicate the progress of the feature at various stages in its life cycle.

Weighted shortest job first section of the SAFe Feature form

Field	Description
User-business Value	Estimate of the business value of the job from this feature. Consider the impact on revenue or other solutions in the market that offer similar capabilities.
Time criticality	Estimated impact on the business when deadlines are missed. For example, consider how shifting deadlines can reduce the projected revenue gain.
Risk reduction	Analysis of how much risk this feature can help you avoid. Answer questions such as the following:

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Field	Description
	○ Does the job add value to the business in other ways? ○ Does the job bring in new business opportunities? ○ Does the job reduce the risk for a future delivery?
Job size	Estimated duration for completion of the job.

3. Click **Submit**.

What to do next
Use the SAFe stories related list to view and add stories to the feature.

Related topics
Define a story in SAFe

Split a SAFe feature

Split a SAFe feature into two separate features so that you can track complete and incomplete stories. You can move the feature with the incomplete stories to your backlog or to a future program increment (PI) so that you can maintain accurate metrics of the previous sprints and PIs.

Before you begin
Role required: safe_art_user or safe_admin

About this task
If your SAFe feature has incomplete stories at the end of a PI, you can split this feature into two features.

The new feature has a reference to the original feature and the field values are copied from the original feature.

The completed stories of the original feature move to a new feature whose state is set to **Released**.

Note:
To split a SAFe feature, you must have at least one complete and incomplete story each.

Procedure
1. Navigate to **All** > **Scaled Agile Framework (SAFe)** > **SAFe Board**.
2. From the list at the top-left corner, select the level as **ART** and select your agile release train.
3. Click the **Backlog** tab.
4. Select the **List** view.

5. From your current PI section, locate the SAFe feature that has incomplete stories and click its number to open its form.
You can click **Complete** to get the list of incomplete features.
6. On the feature form, click the **Move completed stories to new feature** related link.

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- The updated feature form shows only those stories that are incomplete.
- The new feature contains the completed stories from the original feature.
- The **Original feature** field on the new feature references to the original feature that you've split.

  Note:
  Configure your feature form layout to view this field.

- "- Completed" is appended to the short description of the new feature to indicate that it is complete.

What to do next
Schedule the feature that has incomplete stories to your backlog or a new PI of your choice.

Define a story in SAFe

Create high-level definitions of your requirements in the form of stories in SAFe.

Before you begin
Role required: safe_sprint_planner, safe_art_user, safe_scrum_master, safe_story_editor, safe_team_member, or safe_admin

Procedure
1. Create a story using either of the following options.

2. In the form, fill in the fields:

SAFe Story Form

Field	Description
Number	System-generated number for the story.
Feature	Feature to which the story belongs.
SAFe epic	Epic to which the story belongs.
SAFe sprint	Sprint in which the story is scheduled for completion.
Points	Number of points indicating the estimated effort required to complete the story. A larger point value indicates that a greater amount of effort is required.
State	State of the story. Select one of the following: ○ **Draft**: In this state, the story requirements, such as the description and acceptance criteria, are still being drafted. ○ **Ready**: In this state, the story is marked as ready to be picked up by the development team. ○ **Work in Progress**: In this state, the development team works on the story and records their changes in the work notes field. ○ **Ready for Testing**: In this state, the story is marked as ready to be taken up by a tester. ○ **Testing**: In this state, the tester works on testing the story based on the requirements provided in the story.

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Field	Description
	○ **Complete**: In this state, the development and testing efforts on a story are complete. ○ **Cancelled**: In this state, a story has been cancelled. The default state for a new story is **Draft**.
SAFe team	Team to which the story is assigned.
Assigned to	User to which the story is assigned.
Enabler	Check box identifying the story as an enabler. Enablers do not add direct business value but help lay a foundation for future work.
Short description	Brief description of the story.
Description	A more detailed description of the story.
Acceptance criteria	The functional criteria or testing results required to move the story to the state of **Complete**.
Work notes	Work notes indicating the progress of the story at various stages in its life cycle.

3. Click **Submit**.

What to do next

- Use the related links and lists of the story to create tasks for this story, or add dependencies of the current story to other stories. You can also convert this story into a SAFe feature or split this story into two, based on your requirements. For more information, see Related links and lists for a SAFe story.
- You can create a story with the same details as this story using the **Insert** or **Insert and Stay** options from the story additional actions (☰).

  When you use **Insert and Stay**, the form of the newly created story remains open so that you can modify its details, create more stories with these details, or do both.

  On SAFe Board, the new story is positioned right below the original story and the global rank of the new story is set accordingly.

  Note:
  - Set the glide.ui.task.insert and glide.ui.advance properties to **true** to access these actions.
  - These actions are not allowed on stories added from the triage board.

Related links and lists for a SAFe story

Use the related links and related lists in your SAFe story form based on the actions that you need to perform on your story.

The following are the related links and lists on a SAFe story form.

Related links of a SAFe story

Name	Description
Split Story	Splits the story into two stories by creating a new story with the same details. Any

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Related links of a SAFe story (continued)

Name	Description
	incomplete tasks from the old story are moved to this new story.
Convert into feature	Converts an active story into a feature and moves the story into the Cancelled state. The following changes occur: • The default state of the newly created feature is Funnel. • The canceled story is associated with the newly created feature. If the story that you created is too big, you can convert it into a feature and then break it down into multiple stories.
Copy Story	Copies the details of an existing active story to a new story. The tests and tasks of the story are also copied. The newly created story is moved set to the Draft state. This action is not available for stories that are added from the triage board.

Related lists of a SAFe story

Name	Description
SAFe scrum tasks	Lists the scrum tasks created for the story. Click **New** to create a scrum task.
Prerequisites Stories	Lists the stories that must be completed before the current story can be completed. Click **Edit** to add prerequisite stories.
Dependent Stories	Lists the stories that depend on the current story. Click **Edit** to add dependent stories.
Tests	Lists the tests that are used for the story. Add existing tests to the story.

Add dependencies to your SAFe stories

Set dependencies to your SAFe story by adding prerequisite and dependent stories to it. Using the SAFe Planning board, you can distinguish these dependencies between stories during your big room planning and replan the stories as required.

Before you begin
Role required: safe_story_creator

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About this task
Prerequisite stories are the stories that must be completed before the current story can be completed. Dependent stories are the stories that depend on the completion of the current story.

Procedure
1. Navigate to a story by using any of the following options.

2. In the Prerequisite Stories or Dependent Stories related lists, add stories according to the dependencies.
3. Click **Save**.
4. Click **Update**.
   If you're on the SAFe planning board, click the dependencies icon to show or hide dependency lines between stories.

Define an Agile Release Train

From SAFe, define an Agile Release Train (ART) which is a group of agile teams working towards a single solution.

Before you begin
Role required: safe_admin

Procedure
1. Create an agile release train using either of the following options.

2. Enter a suitable name for the agile release train and click **Submit**.

What to do next
Use the following related lists:

Related list	Description
Members	Add or remove members from the Agile Release Train. Members are on the ART, but are not part of any specific agile team. For example, business owner, product manager, release train engineer, or system architect.
Teams	Teams that are part of the Agile Release Train.
SAFe features	View or add features to the Agile Release Train.
Program increments	View or add program increments.
PI Objectives	List of all PI objectives of this ART. View, create, and update the PI objectives. This related list is visible in the SAFe view of the ART form.

Related topics
Define a feature in SAFe

Define a program increment in SAFe

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Define a program increment in SAFe

With SAFe, define a program increment (PI). A program increment is typically 8–12 weeks long, during which an ART delivers incremental value in the form of working, tested software and systems.

Before you begin

Role required: safe_admin

Procedure

1. Navigate to the program increment form using either of the following options.

2. On the form, fill in the fields:

SAFe Program Increment form

Field	Description
Number	System-generated number for the story.
Agile release train	ART to which the PI belongs.
Sprint length	Duration of each of the sprints in the PI.
PI Capacity	Expected PI capacity; usually the aggregate of the group capacity of each team for each sprint in the PI. Helps determine the load of planned features as compared to your expected PI capacity
Name	Name of the PI.
State	Current state of the PI. The default state is **Draft**.
Planned start date	Start date of the PI.
Planned end date	End date of the PI.
Number of sprints	Number of sprints included in the program increment.
Total planned business value	Planned business value score set for all the objectives in this PI. Field value is read-only and is calculated as the sum of all planned business value scores of the committed PI objectives for this PI.
Total actual business value	Realized business value score for all the objectives in this PI Field value is read-only and is calculated as the sum of all the actual business value scores of both committed and uncommitted PI objectives for this PI.
Business value achieved	Percentage of business value achieved computed using the total planned and actual business value scores.

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The sprints for the teams in the PI are determined from the values provided for **Sprint length**, **Planned start date**, and **Number of sprints**.

3. Click **Submit**.

What to do next

Access the following related lists:

Related list	Description
SAFe features	List of features that are scheduled for completion in a program increment.
SAFe stories	View, add, modify, or remove stories that are scheduled for completion in a program increment.
SAFe sprints	View, add, modify, or remove sprints in a program increment.
SAFe Teams	List of all teams that participated in the PI for an ART. Gain visibility into the scores of the total planned and actual business value and percentage achieved for each team. This related list is visible in the SAFe view of the PI form.
PI Objectives	List of all the objectives for this PI. View, create, and update the PI objectives. This related list is visible in the SAFe view of the PI form.

Related topics

Define a feature in SAFe

Define a story in SAFe

Define a SAFe team

From SAFe, create an agile team and associate it to an ART.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Scaled Agile Framework (SAFe)** > **SAFe Teams**.
2. Click **New**.
3. On the form, fill in the fields:

Group form

Field	Description
Name	Suitable name for the group.
Manager	Designated servant leader of the team.
Group capacity (points)	Total capacity of the team per sprint measured in story points.
Group email	Email distribution list of the group.

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Field	Description
Description	Suitable description for the group.

4. Click **Submit**.
5. Navigate to **Scaled Agile Framework (SAFe)** > **Agile Release Trains**.
6. Select an ART to which you want to associate the SAFe team.
7. Click **Edit**, to you associate your team to the ART.
8. Click Save.

What to do next

Use the following related lists:

Related list	Description
Group Members	Add or remove members from the group.
Stories	Add or edit stories assigned to the group.
Sprints	View or add sprints for the group.
PI Objectives	List of all PI objectives of this team. View, create, and update the PI objectives. This related list is visible in the SAFe view of the Group form.

SAFe PI objectives

Use SAFe program increment (PI) objectives to highlight the overall goals for a team or for an agile release train (ART) in a PI.

SAFe PI objectives are created to summarize business and technical goals for the team or ART. During PI planning, the teams first create their PI objectives that they intend to accomplish in the upcoming PI. Program managers can then summarize the PI objectives into a separate set of high-level PI objectives.

PI objectives can directly relate to a feature. But sometimes, multiple features can contribute to a single objective. This situation could require a collaboration between multiple teams.

Although a team should ideally have around 7 to 10 PI objectives, there is no limit on the number of objectives that a team can have.

PI objectives can be committed or uncommitted, either at the team level or program level. A committed objective is an objective that your team is confident about reaching. In contrast, an uncommitted objective is an objective that your team is less confident about reaching because of different dependencies or other factors. The work for an uncommitted objective is planned but it can vary within the scope of the PI.

As PI planning progresses and is finalized, the business owners assign a planned business value (PBV) score to all the PI objectives. The score is on a scale of 1-10, where 1 indicates the lowest priority and 10 indicates the highest priority. As the teams complete the PIs, the business owners assign an actual business value (ABV) score to the PI objectives that are met. At the end of the PI, the PBV and ABV scores are used to compute the achievement values for each team and also for the ART as a whole.

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Using the planned and actual business value scores of the PI objectives, SAFe ART members can track the historical performance of the teams. By using that performance data, the ART members can then chart the SAFe predictability measure of the PIs. These reports provide visibility into the business value that the teams and ARTs provide on a PI-to-PI basis.

Define a SAFe PI objective

Create SAFe program increment (PI) objectives so that you can summarize the goals of your team or agile release train (ART) for the upcoming PIs.

Before you begin

Role required: safe_art_user, safe_scrum_master, or safe_product_owner

About this task

Create your business and technical goals in the form of PI objectives. Associate your PI objectives to an ART or to a team for the duration of a PI.

Procedure

1. Navigate to **All** > **Scaled Agile Framework (SAFe)** > **PI Objectives**.
   You can also use the PI Objectives related list on the SAFe team form, ART form, or PI form.
2. Click **New**.
3. On the form, fill in the fields.

SAFe Objective form

Field	Description
Number	System-generated number for the objective.
Program increment	PI that this objective is planned for.
Committed	Option to indicate if this objective is committed or not.
Type	Type of the objective. Select from either **Program** or **Team**.
Agile release train	ART that this objective is planned for.
Planned business value	Planned business value for this objective. The field is set as an integer score in the range of 1-10. A score of 1 indicates the lowest priority, whereas a score of 10 indicates the highest priority.
Actual business value	Actual business value that is realized from this objective. The field is set as an integer score in the range of 1-10. A score of 1 indicates the lowest priority, whereas a score of 10 indicates the highest priority.
Short description	Brief statement of the objective.
Description	Detailed summary of the objective. Ensure that your description is not too technical or vague.

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Field	Description
Work notes	Work notes that indicate the progress of the objective during the PI.

4. Click **Submit**.

SAFe Board — ART level

As a product manager, you can plan and monitor activities across teams within your agile release train (ART) by accessing the ART level on the SAFe Board.

The ART level includes the following tabs:

- Board
- Backlog
- Planning

Board

The **Board** tab enables you to track all the features of your agile release train in a single view. Board is built on visual task boards, which transform the navigation of the Classic Environment into an interactive graphical experience. The visual task board interface provides a graphic-rich environment for managing and collaborating. To learn more about the actions that can be performed in the board, see Visual Task Boards.

You can move a feature from one lane to another, which in turn updates the state of the feature. For example, when you move a feature from the Analysis lane to the Backlog lane, the state of the feature updates to Backlog.

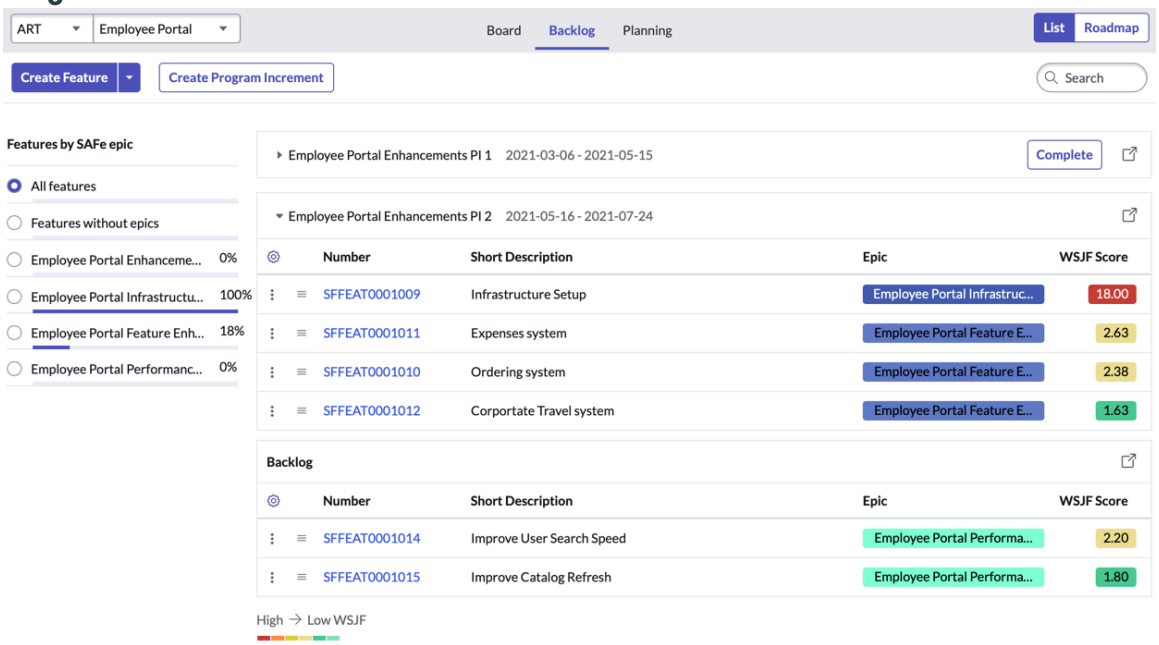
Backlog

The **Backlog** tab enables you to manage your ART backlog, and pre-plan the next program increment on the level of features.

A program increment is a time frame in which various agile teams work in collaboration to deliver a substantial amount of work towards the end of the program increment cycle. Program increment in SAFe is equivalent to a sprint in Agile Development, typically spanning 8–12 weeks. The most common form of program increment comprises four development sprints followed by one innovation and planning sprint.

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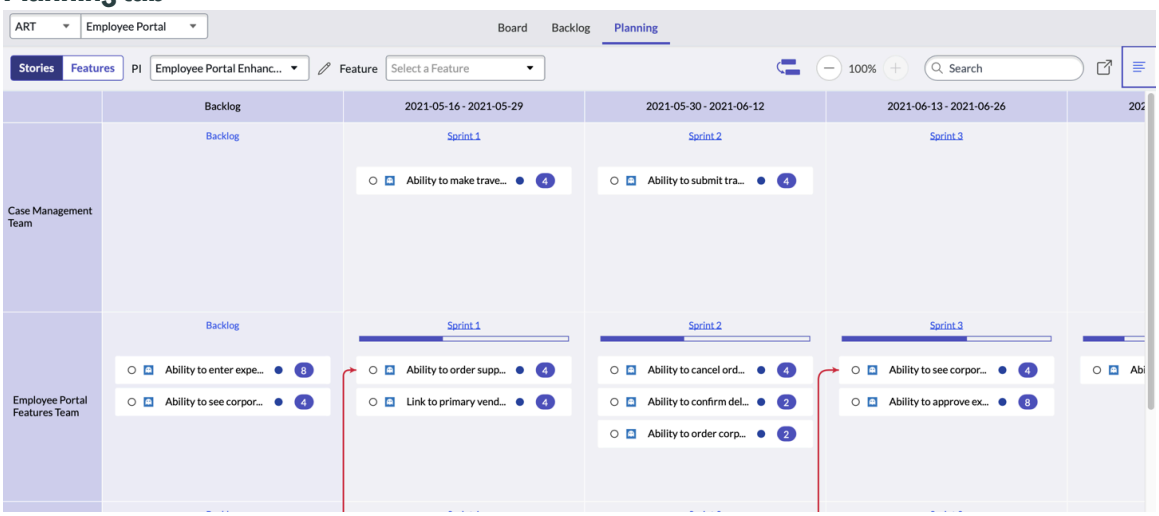
Program increment



Planning

The **Planning** tab facilitates a detailed planning of the upcoming program increment. It allows ART members to discuss the features in the program increment, break them down into stories, and pre-plan the sprints needed to complete the program increment. The **Planning** tab surfaces the dependencies between stories and dependencies between features, which helps in the planning process.

Planning tab



Track features in a board

Track the progress of features in the ART. View their transition from one state (lane) to another.

Before you begin

Role required: safe_admin or safe_art_user

Procedure

1. Navigate to **All** > **Scaled Agile Framework (SAFe)** > **SAFe Board**.
2. From the choice list at the top left corner, select the level as **ART**.

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3. Select the Board view.
4. Move a feature to the required state by dragging and dropping the feature card.
5. **Optional:** Add a feature to a specific state:
   a. Click **Add Card**.
   b. On the form, fill in the fields and submit it.
   For more information on the Feature form fields, see Define a feature in SAFe.

Manage your ART backlog from the SAFe Board

Prioritize and manage features in your agile release train (ART) backlog. The ART backlog lists only the active features that are not assigned to any program increment.

Before you begin

Role required: safe_art_user or safe_admin

About this task

On the SAFe Board, you can perform various actions to manage your backlog, such as adding new features or managing existing features.

Note:
Steps 1 through 3 take you to where you can manage ART backlogs. Steps 4 through 11 provide guidance on different actions that you can perform on your SAFe Board. For steps 4 through 11, choose whatever actions you want to take.

Procedure

1. Navigate to **All** > **Scaled Agile Framework (SAFe)** > **SAFe Board**.
2. From the top-left corner of the SAFe Board, select the level as **ART** and select your ART.
3. Click the **Backlog** tab.
4. Add a feature to the backlog.
   a. Click **Create Feature**.
   b. Specify the required details in the Feature form.
   c. Click **Submit**.
   The feature is listed at the bottom of the backlog on the last page.

   If you want to add a feature at a particular position in the backlog, select a feature just above this position, and then click **Create Feature**. The new feature is now listed below the feature that you selected.
5. Update a feature from the backlog.
   a. Click the number of the feature that you want to update.
   b. Edit the feature details and click **Update**.
6. To filter the list of epics in the Backlog and program Increment (PI) sections, use the epics that are listed under the Features by SAFe epic section.
   The Features by SAFe epic section lists only those epics that are assigned to your ART. The section does not list epics that do not contain features.
7. Add an epic to the Features by SAFe epic section.

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a. Select the options icon () that is next to the **Create Feature** option.

b. Select **Create Epic**.

c. On the SAFe Epic form, fill in the fields and submit the form.
For more details, see Define an epic in SAFe.

8. To arrange features within a Backlog page, use one of the following options.
   - Use the mouse device to select and hold a feature, drag it to the required position, and drop it.
   - Use the keyboard. For more information, see Arrange a feature in the SAFe backlog page using the keyboard.
9. To personalize the columns in a list, select the Personalize icon.
10. Perform various actions on a single feature or set of features.
    a. Select the required features.
    b. Click the options icon () and select one of the following options.
11. To view records in a standard list, select the standard list icon ().

Arrange a feature in the SAFe backlog page using the keyboard

Use the keyboard to move and arrange SAFe features in the **Backlog** tab of the SAFe Board.

Before you begin
Role required: safe_art_user or safe_admin

About this task
You can use the keyboard to change the order of a feature in the Backlog list or in the program increment (PI) list.

Procedure
1. Highlight the feature by pressing the Tab key.
2. Press the Tab key again.
   The context menu icon () on the feature is highlighted.
3. Select the feature by pressing the Enter key.
4. Move the feature to the desired position by using the Up and Down arrow keys.
5. Fix the position of the feature by pressing the Enter key.

Arrange multiple features in the SAFe Board using the keyboard

Use the keyboard to move and arrange multiple SAFe features in the **Backlog** tab of your SAFe Board.

Before you begin
Role required: safe_art_user or safe_admin

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About this task
You can use the keyboard to rearrange multiple features in the Backlog list or in the program increment (PI) list.

Procedure
1. Highlight a feature by pressing the Tab key.
2. Select the feature by pressing the Enter key.
3. Select multiple features by using the Up and Down arrow keys and the Shift or Control key.
   - To select consecutive features, use the Down arrow key to highlight the last feature that you want to select. Press the Shift and Enter keys.
   - To select features that are in different positions on the page, use the Down arrow key to go to the next feature that you want to select. Press the Control and Enter keys. Repeat this process to select other features.
4. Highlight the context menu icon ( ) of the feature by pressing the Tab key again.
5. Press the Enter key to group all the selected features.

   The multiple features that you selected now appear grouped together.
6. Move the features to your desired position by using the Up and Down arrow keys.
7. Fix the position of the features by pressing the Enter key.

Schedule features for your program increments

Define a program increment (PI) and plan the features scheduled for completion within that PI.

Before you begin
Role required: safe_art_user or safe_admin

Procedure
1. Create features for PIs.
2. View current and future program increments either in a list view or on a Visual Task Board (VTB).
3. Assess features in the backlog and move them to a PI.

Use the SAFe program list view

Use the SAFe program list view to create, organize, track, start, and complete your program increments (PIs).

Before you begin
Role required: safe_admin or safe_art_user

Procedure
1. Navigate to **All** > **Scaled Agile Framework (SAFe)** > **SAFe Board**.
2. From the list at the top-left corner, select the level as **ART** and select your ART.
3. Click the **Backlog** tab.
4. Select the **List** view.
   
5. To create a PI, click **Create Program Increment**.

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Fill the required fields in the PI form. To edit an existing PI, click the program increment number and edit the required details in a form.

6. To schedule a feature, drag the feature in the **Backlog** section and drop it in the required PI.
7. To personalise and view columns on a list, click the Personalize icon.
8. To start the first PI, click **Start** that appears in its section.
   The **Planning** tab opens.
9. To complete a PI, click **Complete** that appears in its section.

   A dialog box appears to indicate the number of completed and incomplete stories, features, and sprints. Move incomplete features to a future program increment, or mark features and remaining sprints as **Complete**.

Use the SAFe program roadmap view

Use the SAFe program roadmap view to track program increments (PIs) of your agile release train (ART) and plan features for future PIs.

Before you begin

Role required: safe_admin or safe_art_user

Procedure

1. Navigate to **All** > **Scaled Agile Framework (SAFe)** > **SAFe Board**.
2. From the list at the top-left corner, select the level as **ART** and choose your ART.
3. Click the **Backlog** tab.
4. Select the **Roadmap** view.
5. Schedule a feature by dragging the feature from the **No Program increment** lane and drop it in the required program increment lane.
   You can reschedule features from one PI lane into the other by rearranging the feature cards.
6. Add a feature directly to a PI lane by clicking **Add Card** at the bottom of the list in the lane.

   You can also click the more options icon (⋮) and click **Add card**.

7. Hide a PI lane by clicking the more options icon (⋮) and click **Hide lane**.

SAFe PI planning board

Use a centralized board to plan your program increments (PIs) for an agile release train (ART). You can create and assign stories to teams, add and view story dependencies, track stories by sprints, and re-plan these stories if required.

The SAFe PI planning board contains the following components that guide you during your planning process.

Stories and Features toggle

Select the **Stories** toggle to plan stories of your PI into sprints.

Select the **Features** toggle to track the progress of all features of the PI.

SAFe PI selector

Select a PI that you want to plan or review.

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Feature filter

Select a feature that is associated with your PI. By selecting a feature, you can filter the stories on the program planning board and on the feature backlog pane. You can analyze the workload from this feature and understand how the workload is scheduled across sprints.

Story dependencies

Visually analyze dependencies between stories of different sprints and teams by using the story dependency lines. Use the dependencies icon () to show or hide these dependency lines. If you choose to hide the dependencies or if the dependencies involve a story that is not present on the board, you can see a colored border on the story card.

The color of the dependency indicates the way you've scheduled the stories. Possible colors are the following:

- Green: A prerequisite story is scheduled in a sprint that's before the sprint of the dependent story.
- Yellow: A prerequisite story is scheduled in the same sprint as the dependent story.
- Red: A prerequisite story is scheduled in a sprint that's after the sprint of the dependent story. Review the dependency and reschedule the story as required.

If none of the stories are associated with a prerequisite or dependent story, the dependencies icon () is not visible. For information on how to add story dependencies, see Add dependencies to your SAFe stories.

Feature Backlog pane

Use the backlog pane to view a list of all the features of the selected PI. You can do the following actions for a feature:

- View the description.
- Edit the information by clicking the feature's name.
- Add a new story to the feature by clicking **Create Story**.
- View the unassigned and unscheduled stories of this feature as cards that show the short descriptions and story points.

SAFe Teams

View all the teams of the selected ART toward the left of the planning board. At a time, the planning board can display a maximum of 15 teams. This limit is set to ensure optimum performance of the board during planning activities.

Team backlog lane

See the stories that are assigned to the team but that aren't scheduled yet into any sprint.

If you know which stories must be assigned to the team but you don't know what sprints to use, then you can move these stories from the feature backlog lane to the team's backlog lane. By doing so, you can have a clear idea of the team's workload for the upcoming sprints and then eventually add these stories to the correct sprints.

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You can also unplan a story that has already been scheduled to a sprint by dragging the story card back to the team's backlog. When you later revisit the planning board, you know which team has this story and you can decide on which sprint to use.

Team sprint lanes

See the sprint cadences of the teams.

By pointing your cursor to a sprint's name, you can see the sprint details such as the duration, total story points, and filled capacity. You can click the sprint name to edit details such as group capacity, the planned start date, and the end date.

While planning your PI, if you know the sprint in which the story would be worked on, then you can move the story card to that sprint.

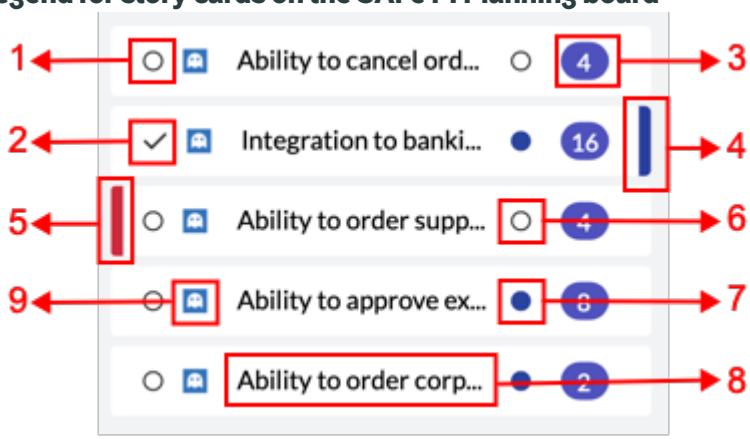
Story cards

See the stories of your SAFe features in the form of cards. You can move these cards around to assign them to teams and to plan them into sprints.

If you have activated the SAFe — Unified Backlog plugin (com.snc.sdlc.safe.multi_task), then you can also see stories that were added from the triage board into your unified backlog. From the PI planning board, you can double-click a story card to open it in a modal form and edit its details. If the story is created from a record on the triage board, such as an incident, then you can see both the story information and the defect information side-by-side.

The story cards use the following indicators:

Legend for story cards on the SAFe PI Planning board



Indicators for story cards on the SAFe PI Planning board

Number	Indicator description
1	Story is not complete.
2	Story is complete.
3	Story points.
4	Story is associated with a dependent story. If this band appears in red or yellow, the color indicates that the dependency is not set correctly and needs to be reviewed.
5	Story is associated with a prerequisite story. If this band appears in red or yellow, the color indicates that the dependency is not set correctly and needs to be reviewed.

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Indicators for story cards on the SAFe PI Planning board (continued)

Number	Indicator description
6	Story belongs to a feature that has this color attributed to it. Point your cursor to the dot to view the feature's name.
7	Story belongs to a feature that does not have a color attributed to it. Point your cursor to the dot to view the feature's name.
8	Short description of the story.
9	Story is a regular story. This icon changes with the type of the story record. For example, you can create stories from incidents, enhancements, defects, problems, and other such records.

Note:
Stories can be created from enhancements, defects, incidents, or other such records only if you have activated the SAFe — Unified Backlog plugin (com.snc.sdlc.safe.multi_task).

Sprint workload capacity bar

Plan a sprint efficiently by using the workload capacity bar that is located under a sprint name. The bar indicates the workload that is planned for the team versus the team's capacity for that sprint.

If the group capacity of a sprint is zero, then you can't view the details of the sprint load and capacity.

Zoom in and zoom out

Adjust the board view using the zoom in icon ( ) and zoom out icon ( ).

Search

Filter the stories on the planning board by using a search term. For example, you can enter a story number or a phrase from a short description.

Stories list

View the list of all stories of the program by using the standard list view icon ( ).

Plan a SAFe program increment

Plan your SAFe program increments (PIs) and track the progress of stories and features in an interactive planning board.

Before you begin

Roles required:

- safe_scrum_user to view the Planning tab
- safe_story_creator to create stories

Procedure

1. Navigate to **All** > **Scaled Agile Framework (SAFe)** > **SAFe Board**.
2. Click **Planning**.
3. From the list on the top-left of the screen, select **ART** and select your agile release train.
4. From the PI list, select a PI.

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5. Select the **Stories** tab.
6. Assign stories to teams and sprints.
   a. Click the feature backlog icon ( ).
   b. **Optional:** Add a new story to this feature by clicking **Create Story** in the backlog pane.
   c. Drag a story card from the feature backlog pane and drop it in the required sprint or Backlog lane of the team.

   You can reschedule the stories across teams and sprints by rearranging the story cards.

   - If you move the story card to a team's backlog, the **SAFe team** field is updated accordingly.
   - If you plan the story card into a sprint, the **SAFe team** and the **SAFe sprint** fields of the story are updated accordingly.

     The sprint capacity bar below the sprint name fills up depending on the stories that are scheduled for it.
7. **Optional:** Add dependencies between the planned stories.

   (Optional) Dependencies that you add between stories automatically apply to the features of the stories.

   Click the dependencies icon to show or hide dependencies between the stories.

   For more information on story dependencies, see Add dependencies to your SAFe stories.
8. **Optional:** Update the group capacity of a team's sprint by clicking the sprint name.

   Group capacity is the projected capacity of the group, in story points, for each sprint. If the group capacity of a sprint is zero, you can't view the details of the sprint load and capacity.

   Note:
   You can update the sprint details only if you have the safe_scrum_master role.

SAFe Board — Team level

As a team member, you can plan and monitor activities within your team by accessing the Team level on the SAFe Board.

The Team level includes the following tabs:

- Backlog
- Sprint Tracking

Backlog

The **Backlog** tab enables you to plan and prioritize stories for a sprint or multiple sprints by assessing stories in the backlog.

In addition, you can:

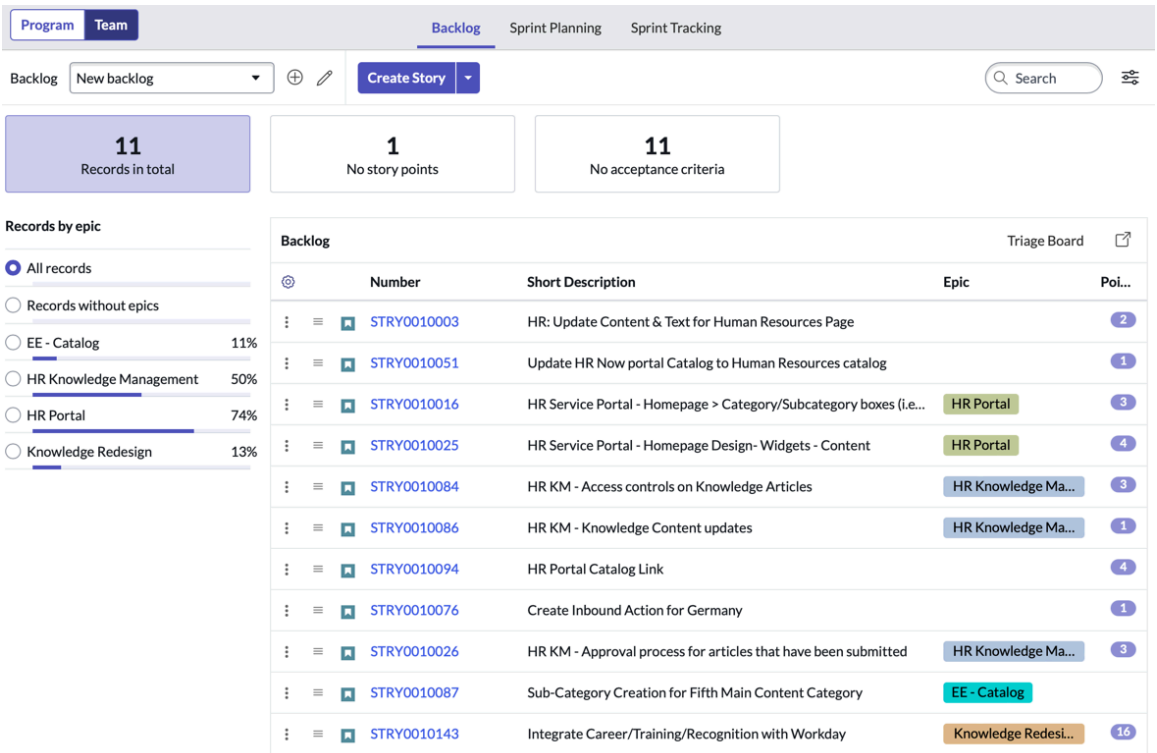
- Create stories.
- Reorder stories in the backlog using the drag feature. The story at the top of the backlog assumes higher priority with a lesser rank value. The story at the bottom of the backlog assumes lower priority with a higher rank value.
- Filter stories by a feature.

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- Type a keyword in the search box to view only stories whose details match with the keyword.
- Create, organize, monitor, start, and complete sprints.
- View current and future sprints in chronological order.
- View these key aspects of a sprint: planned start and end dates, number of story points (total, complete, and pending) for the current sprint.
- Assess stories in the backlog and drag them to sprints.
- Move unfinished stories from the completed sprint to the backlog or a future sprint.

Note:
To see the backlog of your team on SAFe Board, ensure that your team is:

- Of the group type SAFe Team, with the role safe_scrum_user assigned to the team members
- Added to Agile Release Trains



Sprint Tracking

The **Sprint Tracking** tab provides the following views:

Story board

Story board is built on visual task boards, which transform the navigation of lists and forms into an interactive graphical experience. The visual task board interface provides a graphic-rich environment suited for managing and collaborating records. To know more about the actions that can be performed in the board, see Visual Task Boards. In addition, you can:

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- Track all the stories of the current sprint across lanes.
- Move stories from one lane to another, which in turn updates the state of the stories.
- Filter stories based on search criteria.

Task board

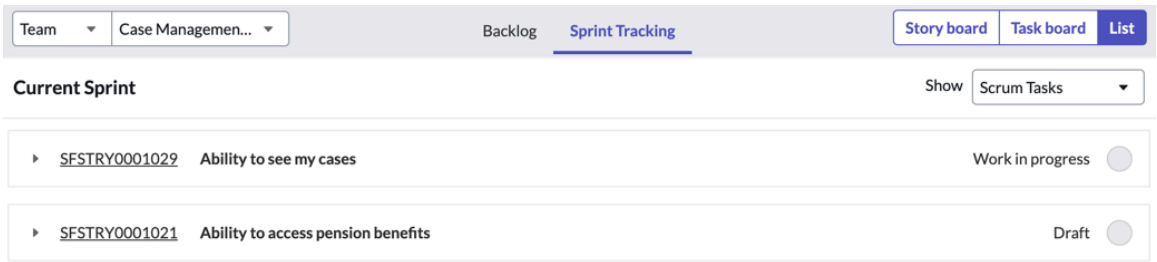
Task board enables you to track all the scrum tasks of stories of the current sprint across lanes.

- Move scrum tasks from one lane to another, which in turn updates the state of the scrum tasks.
- Filter scrum tasks based on search criteria.

List

List displays scrum tasks and tests associated to stories in each sprint. You can:

- Add scrum task and tests without leaving the context of the record.
- View the state, short description, and assignee of the scrum task without drilling down into details.
- View the short description and run result of a test.
- Assess scrum tasks and tests that are pending before the closure of current sprint.



Manage your team backlog

Manage, evaluate, prioritize, and sequence stories in your team backlog.

Before you begin

- Program, to which the team belongs, must contain an active program increment.
- The tab displays only the sprints of the current program increment.

Role required: scrum_product_owner, scrum_master, safe_product_owner, or safe_scrum_master

Procedure

1. Navigate to **All** > **Scaled Agile Framework (SAFe)** > **SAFe Board**.
2. From the choice list at the top-left corner, select the level as **Team**.
3. Select the **Backlog** tab.
4. To add a story to the backlog.

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a. Click **Create Story**.

b. Specify the required details in the story form.

c. Click **Submit**.
The story appears at the bottom of the backlog.

5. To add a story to the backlog and simultaneously decide its order of implementation, perform these steps.

a. Select a story in the backlog.

b. Click **Create Story**.

c. Specify the required details in the story form and click **Submit**.
The story is created beneath the story that was selected in the backlog.

6. The **Records by SAFe feature** section lists features that the records of the backlog belong to. Select a feature. Only records that belong to this feature appear.
7. To open the triage board of a specific task type (such as problems or defects), view the total numbers of records in the triage boards of all task types, edit the filter definition of a triage board, or create another triage definition, click **Triage Board**.

Note:
Triage Board link is displayed only when the Agile — Scaled Agile Framework — Unified Backlog plugin (com.snc.sdlc.safe.multi_task) is installed.

8. To view records in a standard platform list, click the icon to view records in a standard list ().
9. To personalize columns in a list, click the Personalize icon.
10. To move a triaged record from the **Backlog** tab to Triage Board.
    a. Open the record in a form.
    b. Click the **Move back to triage board** related link.
11. Use either of the following options to arrange stories that are not assigned to any sprint.
12. To perform an action on a set of stories.
    - Select the required stories.
    - Click  and select any of the following options:

Perform sprint planning

Perform sprint planning by evaluating stories in the backlog, selecting stories for the sprint, and estimating work effort for the stories.

Before you begin
Role required: scrum_master

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The tab displays only the sprints of the current program increment.

About this task

In SAFe, the main portion of sprint planning occurs during the Big Room Planning process. The team backlog and the sprint planning portion of it is designed for refinement sessions. Though the overall plan of each sprint of a program increment already exists, the team still has sprint planning sessions every two weeks to add any missing stories and adjust the initial plan.

Procedure

1. Navigate to **All** > **Scaled Agile Framework (SAFe)** > **SAFe Board**.
2. From the choice list at the top left corner, select the level as **Team**.
3. Select the **Backlog** tab.
4. To add a story to the sprint and simultaneously decide its order of implementation, perform these steps:
   a. Point to a story in the sprint.
   b. Click **Create Story**.
   c. Specify the required details in the story form and click **Submit**.
      The story is created beneath the story that was selected in the backlog or a sprint.
5. To personalize columns in a list, click the Personalize icon.
6. To start a sprint, click **Start** that appears at right corner of the first or top sprint.
7. To complete a sprint, click **Complete Sprint** that appears at right corner of the first or top sprint. A dialog box appears indicating the number of completed and incomplete stories in the sprint. Move incomplete stories, if any, to the backlog or a future sprint. Click **Complete**.

Track your SAFe tasks from the Board view

Track the progress of your SAFe stories and scrum tasks. View their transition from one state (lane) to another in a visual task board.

Before you begin

Role required: safe_scrum_user or safe_admin

Procedure

1. Navigate to **All** > **Scaled Agile Framework (SAFe)** > **SAFe Board**.
2. From the list at the top-left corner, select the level as **Team**.
3. Click the **Sprint Tracking** tab.
4. To track the progress of stories of the current sprint, select the **Story board** view.
   a. To change the state of a story, move the story from one lane to another.
   b. To add a story to a specific lane:
      i. Click **Add Task**.
      ii. In the form, fill in the fields.
      iii. Click **Submit**.
5. To track the progress of scrum tasks of stories of the current sprint, select the **Task board** view.

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a. To change the state of a scrum task, move the scrum task from one lane to another.

b. To add a scrum task to a specific lane:

i. Click **Add Task**.

ii. In the form, fill in the fields.

iii. Click **Submit**.

Track your SAFe team work from the list view

Create, execute, track, and complete the scrum tasks and tests of a SAFe story from the list view.

Before you begin

Role required: safe_scrum_user or safe_admin

Procedure

1. Navigate to **All** > **Scaled Agile Framework (SAFe)** > **SAFe Board**.
2. From the list at the top left corner, select the level as **Team**.
3. From the adjacent list, select the required team value.
4. Click the **Sprint Tracking** tab, and select the **List** view.
5. To breakdown a story into scrum tasks:
   a. From the **Show** list at the top right corner, select **Scrum Tasks**.
   b. Click **Add Scrum Task**.
   c. On the form, fill in the fields.

Scrum Task form

Field	Description
Number	System generated number for the SAFe story.
SAFe story	SAFe story that is associated with the scrum task.
Priority	Priority set for the scrum task.
Type	Type of effort required to complete the scrum task.
State	Current state of the scrum task. Denotes the progress of the scrum task.
Assigned to	User to whom the scrum task is assigned.
Short description	Brief description of the scrum task.
Description	Detailed description of the scrum task.
Work notes	Work notes indicating the progress of the scrum task at various stages in its life cycle.

   d. Click **Submit**.
6. To create a test for a SAFe story:

Note:
The option to create a test is available only when Test Management 2.0 is installed.

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a. From the **Show** list at the top-right corner, select **Tests**.

b. Click **Add Test**. For more information, see Create a test for a SAFe story.

7. To run tests that are in the **Ready** state for a SAFe story:

a. Click the **Run** button on a story.

b. In the pop-up, select the environment on which the tests are to be run, and click **Run**. For more information, see Run a test for a SAFe story.

8. To personalize columns in a list, click the Personalize icon.

Create a test for a SAFe story

Create a test, add steps to the test, and create and maintain different versions of the test. A test is a collection of conditions or steps used to determine whether a SAFe story is working correctly. A test can also include an expected result that determines whether the test passes or fails.

Before you begin

- Role required: safe_scrum_user or safe_admin
- You can create a test from the List view only when the Test Management 2.0 plugin is installed.

Procedure

1. Navigate to **All** > **Scaled Agile Framework (SAFe)** > **SAFe Board**.
2. From the list at the top left corner, select the level as **Team**.
3. From the adjacent list, select the required team value.
4. Click the **Sprint Tracking** tab, and select the **List** view.
5. From the **Show** list at the top right corner, select **Tests**.
6. Click **Add Test**.
7. In the form, fill in the fields:

Test Version form

Fields	Description
Test	Unique name of the test.
Owner	Owner who created the test.
Version	Automatically generated version of the test.
State	Current state of the test. ○ **Draft**: State of the test when it is created. ○ **Ready**: State of the test when it is not editable. When the test has multiple versions, only one test will be in the **Ready** state at any one time. ○ **Retired**: State of the test when it is no longer used.
Short description	Brief description about the test.
Add Step	Button used to add step to a test.
Run	Button used to run steps, which is displayed only when the test is in the **Ready** state.

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Fields	Description
Update	Button used to update the details of a test version.
Ready	Button used to change the state of the test version to ready.
Create New Version	Button used to create another version of the test.
Delete Test	Button used to delete the test version.
Change the order of a step	Icon used to change the order of a test step. Select the icon and drag a step to the required location.
Needs Verification	Check box used to mark a test step for verification.
Delete a test step ()	Icon used to delete a test step.

What to do next
View information in the following related lists:

Related list	Description
Other versions	Displays all the versions of a test.
Test Results	Displays the run results of each test version.
Test Sets	Displays related tests in a test set.

Run a test for a SAFe story

View the test scenario and execute all the steps of a test for verifying a SAFe story.

Before you begin
Role required: safe_scrum_user or safe_admin

Procedure
1. Navigate to **All** > **Scaled Agile Framework (SAFe)** > **SAFe Board**.
2. From the list at the top left corner, select the level as **Team**.
3. From the adjacent list, select the required team value.
4. Click the **Sprint Tracking** tab, and select the **List** view.
5. From the list, select **Tests**.
6. Verify a story by clicking the **Run** button.
   This action runs all tests of the story at once.
7. In the pop-up, select the environment on which the test has to be run.
8. In the Test Execution pop-up, mark a step as passed, failed, or blocked using the following icons.
   - To select an icon, you can also press **Tab** and then press **Enter**.
   - To pause and work on the test at a later point in time, click **Pause**.
9. Click **Done**.

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Result
The test result is saved to the Test Result form. The latest test result of each test is displayed in the List view.

The overall status of the test is defined by statuses of the test steps:

- If all the test steps are passed, the status of the test is **Passed**.
- If at least one step of the test is not run, the status of the test is **Not finished**.
- If at least one step of the test fails, the status of the test is **Failed**. This rule takes precedence over the previous rule.
- If at least one step of the test is blocked, the status of the test is **Blocked**. This rule takes precedence over the previous two rules.

Troubleshoot test failures

View the history of test runs. Troubleshoot and rectify the test failures in SAFe.

Before you begin
Role required: safe_scrum_user or safe_admin

Procedure
1. Navigate to **All** > **Scaled Agile Framework (SAFe)** > **SAFe Board**.
2. From the list at the top left corner, select the level as **Team**.
3. Click the **Sprint Tracking** tab and select the **List** view.
4. Click a test within a story.
5. Click the **Test Result** related list.
   Test results related to that version of the test are displayed.
6. Click a test result to view its details in a form.

Test Result form

Field	Description
Number	Automatically generated number for the test result.
Result	Run status of the test: **Passed**,**Failed**, or **Blocked**.
Execution environment	Environment on which the test is run.
Run by	Name of the tester who runs the test plan.
Test	Test that is run.
Version	Version of the test that is run.
Updated	Date and time when the test result was recorded.
Test run	Name of the test run.
Short description	Brief description of the test result.

The execution status of each step of the test is also indicated at the bottom of the form.

Portfolio SAFe

With Portfolio SAFe, you can align your organizational goals and strategies with your portfolios, and apply lean and agile principles to seamlessly manage and deliver your portfolio work.

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Portfolio SAFe works at three levels for portfolio managers, product managers, and team members. At the Portfolio level, portfolio managers can capture and prioritize epics in a centralized backlog, and monitor the progress of epics in a visual task board. An epic is the largest unit of work that has one common objective such as a customer request or business requirement.

At the ART level, product managers can capture, prioritize, and monitor features that are decomposed from epics. At the Team level, team members can implement stories that are decomposed from features. To learn more about the levels, see the SAFe Board section below.

To start using the features of Portfolio SAFe, install the Agile - Scaled Agile Framework - Portfolio SAFe plugin (com.snc.sdlc.portfolio_safe).

SAFe Board

The table below provides an overview of how you can access the key levels of Portfolio SAFe on SAFe Board.

Level	Description
Portfolio	As a portfolio manager, you can plan and monitor activities within a portfolio by accessing the **Portfolio** level on the **Scaled Agile Framework (SAFe)** > **SAFe Board**. In addition, you can: • manage the portfolio backlog in a centralized location. • track all the epics of the portfolio and view their transition from one state (lane) to another, in a visual task board.
Agile Release Train (ART)	As a product manager, you can plan and monitor activities across teams within an ART by accessing the **ART** level on the **Scaled Agile Framework (SAFe)** > **SAFe Board**. In addition, you can: • manage the ART backlog in a centralized location. • define a program increment and identify the features to be completed within that program increment. • perform big room planning. • track all the features of the ART and view their transition from one state (lane) to another, in a visual task board.
Team	As a team member, you can plan and monitor activities within the team by accessing the **Team** level on the **Scaled Agile Framework (SAFe)** > **SAFe Board**. In addition you can: • manage the team backlog in a centralized location. • streamline sprint planning and completion activities. • track all stories and view their transition from one state (lane) to another, in a visual task board.

Components installed with Portfolio SAFe

Several types of components are installed with activation of the Agile - Scaled Agile Framework - Portfolio SAFe plugin (com.snc.sdlc.portfolio_safe), including tables and user roles.

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Roles installed

Role	Description	Contains roles
SAFe admin [safe_admin]	• Edits, creates, and deletes SAFe ART, epics, features, stories, and program increments. • Has read-only access to SAFe teams.	• safe_art_user • safe_scrum_master • safe_product_owner
SAFe portfolio user [sn_portfolio_safe.safe_portfolio_user]	Maintains the portfolio backlog and can edit, create, and delete SAFe epics, features, and stories.	safe_art_user
SAFe scrum product owner [safe_product_owner]	• Maintains the team backlog and can edit, create, and delete SAFe stories. • Has read-only access to SAFe ART, teams, epics, and features. • Has read-only access to SAFe program increments.	safe_story_creator
SAFe ART user [safe_art_user]	• Maintains the ART backlog and can edit, create, and delete SAFe epics, features, stories, and program increments. • Edits SAFe teams. • Has read-only access to SAFe ART.	safe_story_creator
SAFe scrum master [safe_scrum_master]	• Edits, and deletes SAFe stories. • Edits SAFe teams. • Has read-only access to SAFe ART, epics, features, and program increments.	safe_story_creator
SAFe scrum user [safe_scrum_user]	Can view all elements of SAFe, but cannot create, edit, or manage records of any type.	None

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Role	Description	Contains roles
SAFe scrum story creator [safe_story_creator]	• Edits, creates, and deletes SAFe stories. • Has read-only access to SAFe ART, teams, epics, features, and program increments.	safe_story_editor
SAFe scrum story editor [safe_story_editor]	• Arranges stories within the team backlog using the drag and drop feature. • Edits SAFe stories. • Has read-only access to SAFe ART, teams, epics, features, and program increments.	• safe_scrum_user • rm_scrum_task_admin

Tables installed

Table	Description
SAFe epic [sn_safe_epic]	Information about epics.
SAFe feature [sn_safe_feature]	Information about features.
Agile Release Train [sn_safe_program]	Information about ART.
Program Increment [sn_safe_program_increment]	Information about program increments.
SAFe ART team [sn_safe_program_m2m_group]	Relationships between groups and ART.
SAFe ART Member [sn_safe_program_member]	Information about members within an ART.
SAFe ART Sprint [sn_safe_program_sprint]	Sprint schedules of teams within the ART.
SAFe ART VTB Board [sn_safe_program_vtb_board]	Records displayed on the ART level, Board tab.

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Table	Description
SAFe Scrum Task [sn_safe_scrum_task]	Information about SAFe scrum tasks.
SAFe Sprint [sn_safe_sprint]	Information about sprints.
SAFe Story [sn_safe_story]	Information about stories.
SAFe PI Objectives [sn_safe_pi_objective]	Stores the SAFe PI objectives.
SAFe team predictability measure [sn_safe_pi_m2m_group]	Stores the business value achieved per team from PI objectives which is used for team-level predictability measure data.
Portfolios [pm_portfolio]	Information about portfolios.
Portfolio SAFe VTB board [sn_portfolio_safe_vtb_board]	Records displayed on the portfolio level, Board tab.
SAFe Team VTB Board [sn_safe_team_vtb_board]	Records displayed on the Team level, Board tab.

Define a portfolio

From SAFe, define a portfolio which is a group of ARTs working towards a single solution.

Before you begin

Role required: sn_portfolio_safe.safe_portfolio_user

Procedure

1. Navigate to **All** > **Scaled Agile Framework (SAFe)** > **Portfolios**.
2. Click **New**.
3. In the form, fill in the fields:

Portfolio form

Field	Description
Name	Unique name for the portfolio.
Portfolio manager	Manager to whom the portfolio is assigned.
Description	More detailed description of the portfolio.

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What to do next

- Define an Agile Release Train
- Define an epic in SAFe

SAFe Board—Portfolio level

As a portfolio manager, you can plan and monitor activities within your portfolio by accessing the Portfolio level on the SAFe Board.

The Portfolio level includes the following tabs:

- Board
- Backlog

Board

The **Board** tab enables you to track all the epics of your portfolio in a single view. Board is built on visual task boards, which transform the navigation of lists and forms into an interactive graphical experience. The visual task board interface provides a graphic-rich environment for managing and collaborating.

In addition, you can move an epic from one lane to another, which in turn updates the state of the epic. To learn more about the actions that can be performed in the board, see Visual Task Boards.

Backlog

The **Backlog** tab enables you to manage your portfolio backlog, which comprises epics.

Track your epics

Using the Board tab, track all epics of your portfolio and view their transition from one state (lane) to another.

Before you begin

Role required: sn_portfolio_safe.safe_portfolio_user

Procedure

1. Navigate to **All** > **Scaled Agile Framework (SAFe)** > **SAFe Board**.
2. From the choice list at the top left corner, select the level as **Portfolio**.
3. Select the Board view.
4. Move an epic to the required state by dragging and dropping the epic card.
5. **Optional:** Add an epic to a specific state:

   a. Click **Add Card**.

   b. On the form, fill in the fields and submit it.
   For more information on epic fields, see Define an epic in SAFe.

Manage your portfolio backlog

Manage, evaluate, prioritize, and sequence epics in your portfolio backlog.

Before you begin

Role required: sn_portfolio_safe.safe_portfolio_user

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Procedure

1. Navigate to **All** > **Scaled Agile Framework (SAFe)** > **SAFe Board**.
2. From the choice list at the top left corner, select the level as **Portfolio**.
3. Click the **Backlog** tab.
4. To add an epic at the bottom of the backlog.
   a. Click **Create Epic**.
   b. Specify the required details in the form and click **Submit**.
5. To add an epic while simultaneously deciding its order of implementation in the backlog.
   a. Select an epic in the backlog.
   b. Click **Create Epic**.
   c. Specify the required details in the form and click **Submit**.
   The epic is created beneath the epic that was selected in the backlog.
6. To search for epics by their short descriptions, type a word in the search box and press **Enter**.
7. To arrange epics within the backlog, use either of the following options.

   If the backlog contains more than 50 epics, then a pagination control appears at the bottom of the list enabling you to navigate to the first, last, previous, or next page in the list.
8. To view the backlog as a standard platform list, click **View Standard List**.
9. To perform any action on a set of epics.
   - Select the required epics.
   - Click  and select any of the following options:

SAFe — Unified Backlog

SAFe — Unified Backlog allows you to maintain a centralized backlog containing records of different task types, such as defects, problems, incident tasks, and stories. It facilitates in prioritizing and sequencing different task type records in one location, saving you steps. It also removes the overhead of converting records to stories.

Important:

Starting with the Xanadu release, Portfolio SAFe, Essential SAFe, Performance Analytics Content Pack for Essential SAFe, Work Progress Status for SAFe, Agile - Scaled Agile Framework - Unified Backlog, and Read only roles for SAFe plugins are being prepared for future deprecation. These plugins will be hidden and can no longer be activated on new instances but will continue to be supported. Enterprise Agile Planning in Strategic Planning provides the latest experience for this functionality.

For more information on the deprecation process and its impact, see the Application/Plugin Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

The flow described below represents the common practice of creating and managing records using SAFe — Unified Backlog along with Essential SAFe.

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Setting up a triage board

You can set up a triage board by defining filter criteria, and view records of a specific task type on the triage board. For example, you can create one triage board for defects and another for incidents. Records are dynamically updated in all triage boards.

Triaging and assigning records

You can move records from a triage board to the **Backlog** tab. In the **Backlog** tab, you can estimate points and assign the record to a user using the Points, and Assignment fields in the Story Information tab of the record. You can open the triage board of any specific task type, view the total numbers of records in the triage boards of all task types, or edit the filter definition of a specific triage board.

Working with the triaged records in the Board view

As you work with stories, work with the triaged records (represented by stories) in the **Sprint Tracking** tab, Board view. When you move a triaged record from one lane to another, the state of its wrapper story changes, but the state of the original triaged record remains the same. To change the state of the original triaged record, you would need to open the record in a form and update the state.

Set up a triage board in SAFe

Set up your own triage board by defining filter criteria, and view records that are important to your team, such as problems, incident tasks, defects, or change requests. For example, you can create one triage board for defects and another for incidents.

Before you begin

You must be added to the SAFe team that would be responsible for handling work from this triage board.

Role required: safe_scrum_master

Procedure

1. Navigate to **All** > **Scaled Agile Framework (SAFe)** > **SAFe Board**.
2. Select the **Backlog** tab.
3. Select **Triage Board**.
4. On the form, fill in the fields:

SAFe Triage Definition form

Field	Description
Name	Suitable name for the triage board.
Table	Table from which you want to filter records.
Filter	Filter criteria to be applied on the table for refinement of records.

Note:

When setting up a triage board, do not to remove these default conditions:

- **Active is true**: This condition ensures that the tasks on your Triage Board are relevant.
- **Agile story is empty**: This condition ensures that the task is not present in some other backlog.

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5. Click **Submit**.
   A triage definition is created.

What to do next

1. Select the triage definition.
2. To add a record to the triage definition, click **New**.
3. To move a record from the triage board to the **Backlog** tab, click **Add to Backlog**.

Performance Analytics Content Pack for Essential SAFe

Improve your SAFe processes and practices using the Platform Analytics Content Pack for Essential SAFe that contains preconfigured dashboards with data visualizations.

Overview of the Performance Analytics dashboards for Essential SAFe.

Important:

Starting with the Xanadu release, Portfolio SAFe, Essential SAFe, Performance Analytics Content Pack for Essential SAFe, Work Progress Status for SAFe, Agile - Scaled Agile Framework - Unified Backlog, and Read only roles for SAFe plugins are being prepared for future deprecation. These plugins will be hidden and can no longer be activated on new instances but will continue to be supported. Enterprise Agile Planning in Strategic Planning provides the latest experience for this functionality.

For more information on the deprecation process and its impact, see the Application/Plugin Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Enabling the Performance Analytics Solution

Use the Performance Analytics widgets on the dashboard to visualize data over time, analyze your business processes, and identify areas of improvement. With solutions, you can get value from Performance Analytics for your application with minimal setup.

Note:
Solutions include some dashboards that are inactive by default. You can activate these dashboards to make them visible to end users according to your business needs.

For unlimited access to all features of this Platform Analytics Solution, purchase a Performance Analytics subscription. For more information, see Activating your Performance Analytics subscription.

Important:
From the Xanadu release onwards, the Essential SAFe dashboards must be accessed in the Next Experience UI.

To use this Platform Analytics Solution, you must activate your subscription to Performance Analytics for Business Management. For more information about entitlements to Performance Analytics, see Activating your Performance Analytics subscription.

This base system Platform Analytics Solution is available from the ServiceNow Store. To enable this solution, as an admin, navigate to **System Applications** > **Search ServiceNow Store**. When the landing page for the ServiceNow Store opens, search for Performance Analytics Content Pack for Essential SAFe. When you find the solution, follow the instructions in the ServiceNow Store. The ServiceNow Store has its own documentation.

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Business stakeholder role support

The business stakeholder role (sn_safe_read) has read-only access to all Essential SAFe dashboards. For more information, see Business stakeholder role for Essential SAFe and Portfolio SAFe.

Related topics

Platform Analytics Solutions

Activate your Performance Analytics subscription

Enable daily data collection for Essential SAFe dashboards

Enable scheduled data collection to begin collecting scores on new data automatically for Essential SAFe dashboards. Data collection jobs automatically collect scores for automated indicators and breakdowns.

Before you begin

Role required: pa_admin or admin

About this task

Note:
Historical data collection is not supported for the underlying indicators of the [SAFe] Daily Data Collection job.

Procedure

1. Navigate to **All** > **Performance Analytics** > **Data Collector** > **Jobs**.
2. Find and open the [SAFe] Daily Data Collection job.
3. Start the [SAFe] Daily Data Collection job.
   a. Scroll down to the Job parameters section.
   b. Set the **Run as** field to pa_admin, pa_data_collector or admin roles.
   c. Verify that the time zone in the **Run As tz** field is appropriate for your organization. This timezone is used for the following:
      - Database queries created for this job
      - Indicator conditions such as [[Created][on][Today]]
   d. Enable the scheduled run of the job by selecting the **Active** checkbox.
4. Click **Update**.

Using Solution Library for Essential SAFe dashboards

Upgrade to the latest layout of Essential SAFe dashboards using Solution Library.

Existing users who upgraded to the latest version 1.1 of Performance Analytics Content Pack for Essential SAFe can install the latest layout of the dashboards from Solution Library.

For example, if you are upgrading from version 1.0.1 or earlier of the application, install the following dashboards from Solution Library to access the latest layout:

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- SAFe Feature Dashboard
- SAFe Sprint Dashboard
- SAFe PI Dashboard
- SAFe Epic Dashboard
- SAFe Team Dashboard

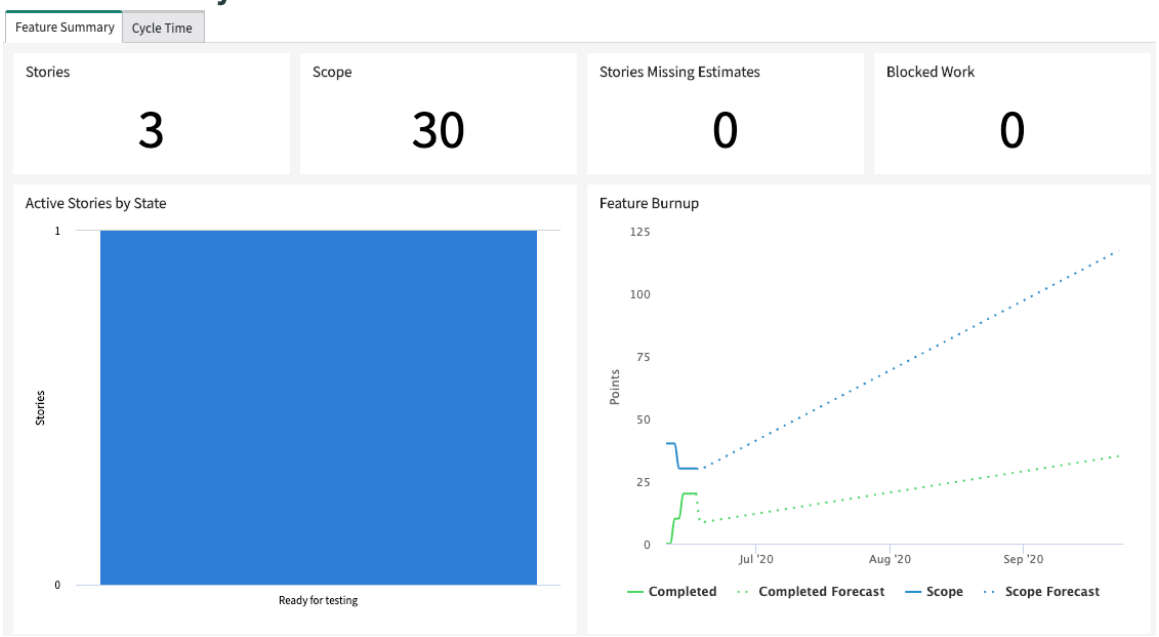
For more information, see Use Solution Library to install a dashboard.

Note:
For users on the Xanadu release, the **Install** and **Upgrade** buttons are not visible on the Solution Library content form. For information on resolving this issue, see Allow PA Solution Library for Store apps.

SAFe Feature Dashboard

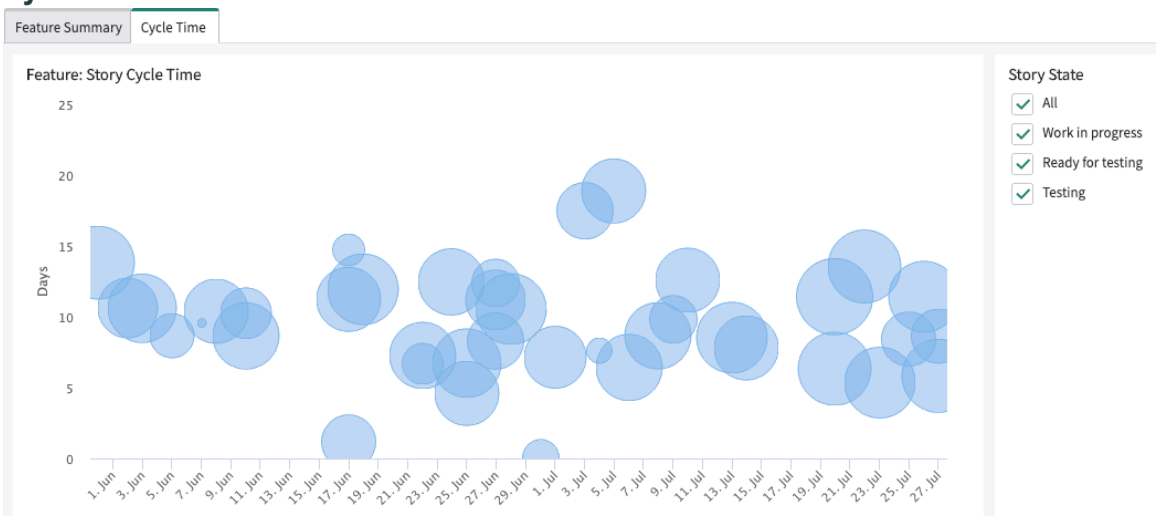
The SAFe Feature Dashboard provides a visualization of the changes in scope and the progress of the stories in the feature over a given period.

Feature Summary tab



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Cycle Time tab



End user and roles

End user goal with required role

End user and goal	Required role
SAFe ART user: View the amount of work that has been completed in a feature. Gauge whether the feature can be completed on time.	SAFe_scrum_user

Indicators

SAFe: Sum of story points of all stories in the feature

Generates the completed line in the Feature Burnup report.

SAFe: Sum of story points of completed stories in feature

Generates the scope line in the Feature Burnup report.

Widgets

Stories

Indicates the total number of stories in the feature.

Scope

Indicates the scope of the feature which is in story points. This widget lets you see at a glance how much work must be completed in a feature.

Stories Missing Estimates

Indicates the number of stories in the feature that are missing estimates.

Blocked Work

Indicates the amount of work (in story points) in the feature that is blocked.

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Data visualizations

If you are upgrading from version 1.0.2 or earlier of Performance Analytics Content Pack for Essential SAFe, then install this dashboard from Solution Library to upgrade its layout and access the following visualizations:

- Feature Burnup
- Story Cycle Time

For more information, see Using Solution Library for Essential SAFe dashboards.

Work item progress

Title	Type	Description
Stories By State	Bar chart 	At a single glance, understand the overall progress of a feature seeing all of its stories grouped by state.
Feature Burnup	Line chart 	Indicates the scope changes, if any, and trends of those scope changes. You can estimate when the feature is likely to be completed. The Feature Burnup report comprises the following series that can be hidden or displayed based on your preference: • **Scope**: Indicates the size of the feature, as the sum of story points defined in this feature. • **Scope Forecast**: Predicts the possibility of scope change for the future dates, which is based on historical data. • **Completed**: Indicates the amount of work (in story points) in the feature that is complete. • **Completed Forecast**: Predicts the burnup for the future dates. It indicates whether you can complete the feature on time. This prediction is based on historical data. **Note:** The point at which the Completed Forecast series intersects with or crosses the Scope Forecast series is a predictor for when the feature might be completed. If the Completed Forecast series and the Scope Forecast series do not appear to ever intersect, it is a warning that scope is being added faster than work is being completed.

Cycle Time

Title	Type	Description
Story Cycle Time	Bubble chart	Identify the time taken for each story in the feature to move from an in-progress state to completion.

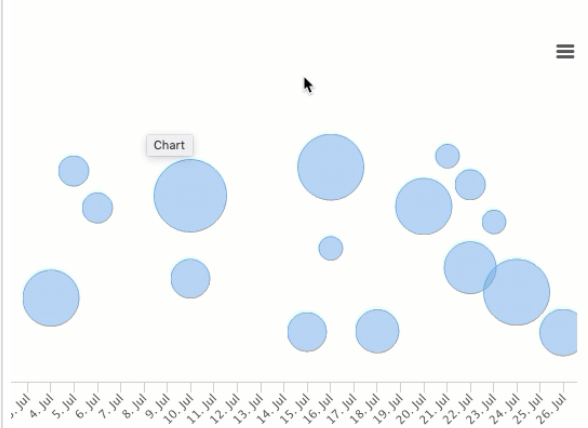
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Cycle Time (continued)

Title	Type	Description
		Each bubble on the graph represents a story. The height of the bubble from the x-axis shows how long that story took to move from an in-progress state to completion. The size of the story bubbles are relative to each other based on their story points. Hovering your mouse cursor over a bubble displays the following details about that story: • Story points • Date on which the story is moved to completion • Total cycle time (in days) of the story • Number of days that the story was in the **Work in progress** state • Number of days that the story was in the **Ready for testing** state • Number of days that the story was in the **Testing** state From the Story State section towards the right of the report, you can filter the report to view the cycle time of the stories for the selected states. The chart displays the cycle time for each story as the cumulative sum of all duration of the selected states. If there are too many stories at any area of the chart and the bubbles appear crowded on the report, you can zoom in that particular area of the report for a clearer view.

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Cycle Time (continued)

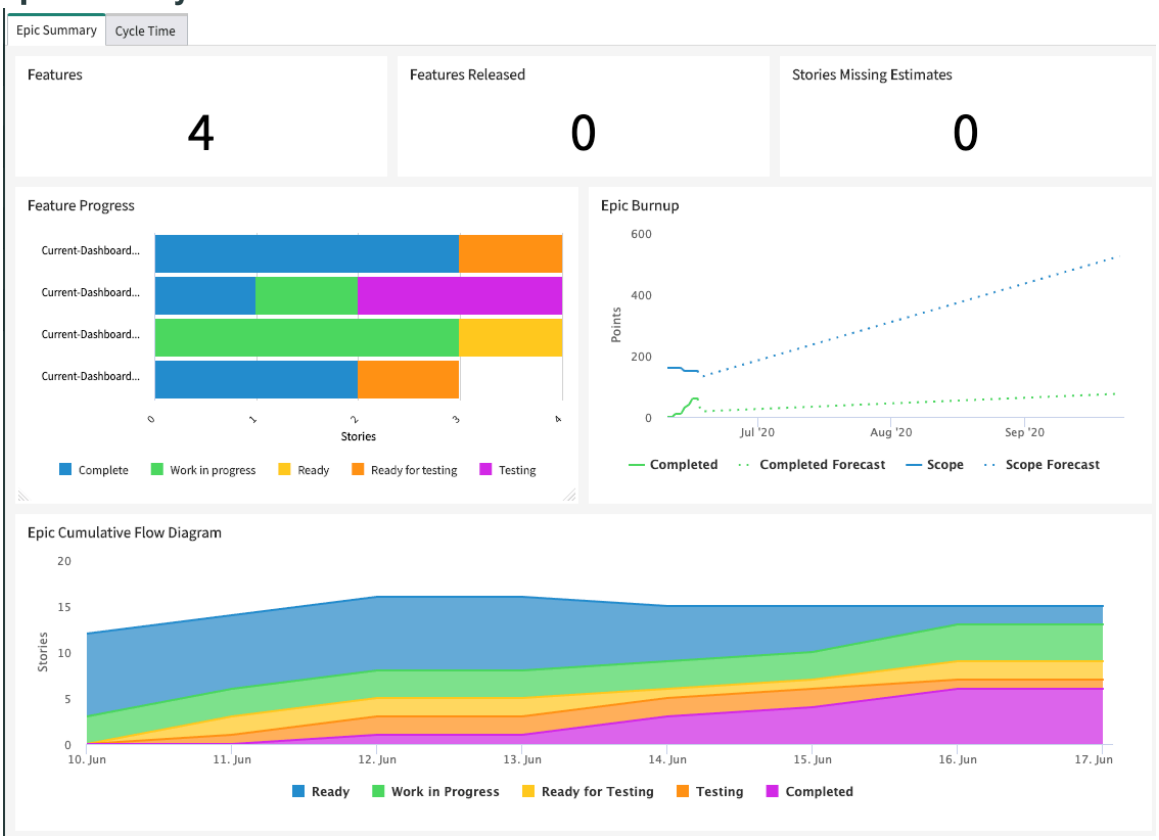
Title	Type	Description
		

You can customize the Burnup report. For more information, see Customizing Essential SAFe dashboard reports.

SAFe Epic Dashboard

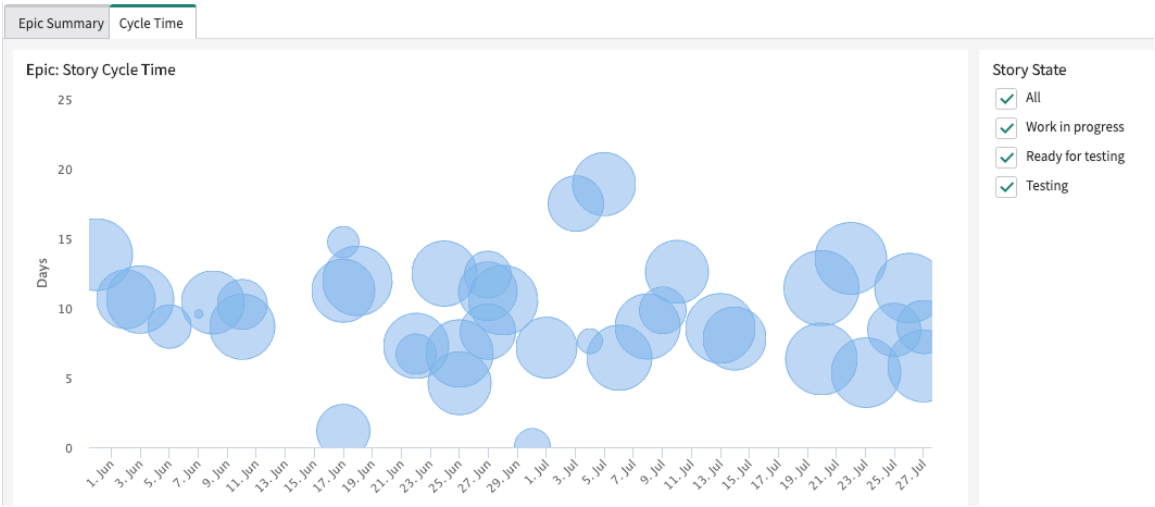
The SAFe Epic Dashboard provides a visualization of how the features of an epic are progressing over a given period of time.

Epic Summary tab



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Cycle Time tab



The SAFe epic dashboard displays such as total number of features that are complete, and number of stories that are missing estimates. It also indicates the pace at which the ART members are completing the features in the epic.

End user and roles

End user goal with required role

End user and goal	Required role
SAFe ART user: View the progress of every feature in the epic.	safe_scrum_user

Indicators

SAFe: Sum of story points of all stories in epics

Generates the scope series in the Epic Burnup report.

SAFe: Sum of story points of completed stories in epics

Generates the complete series in the Epic Burnup report. This series indicates the amount of work that has been completed in the epic.

SAFe: Count of all stories in current epic

Generates the area series the Epic Cumulative Flow Diagram report, which indicates the number of stories of the current epic by state.

Breakdowns

- SAFe: Epic
- SAFe: State

Widgets

Features

Indicates the total number of features in the epic.

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Features Released

Indicates the number of features in the epic that have been completed.

Stories Missing Estimates

Indicates the number of stories in the epic that are missing estimates.

Data visualizations

If you are upgrading from version 1.0.2 or earlier of Performance Analytics Content Pack for Essential SAFe, then install this dashboard from Solution Library to upgrade its layout and access the following visualizations:

- Epic Burnup
- Epic Cumulative Flow Diagram
- Story Cycle Time

For more information, see Using Solution Library for Essential SAFe dashboards.

Epic Summary

Title	Type	Description
Feature Progress	Horizontal bar chart 	View the progress of every feature in an epic.
Epic Burnup	Line chart 	Shows the epic burnup trends. You can estimate when the epic is completed. The Epic Burnup report comprises the following series that can b displayed based on your preference: • **Scope**: Indicates the size of the epic. • **Scope Forecast**: Predicts the possibility of scope change for th which is based on historical data. • **Completed**: Indicates the amount of work in the epic that is co • **Completed Forecast**: Predicts the burnup for the future dates. whether you can complete the epic on time. This prediction is historical data. **Note:** The point at which the Completed Forecast series intersects crosses the Scope Forecast series is a predictor for when th completed. If the Completed Forecast series and the Scope do not appear to ever intersect, it is a warning that scope is b faster than work is being completed.
Epic Cumulative Flow Diagram	Area chart	Monitor the progress of all the stories of your epic between its ac end dates.

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Epic Summary (continued)

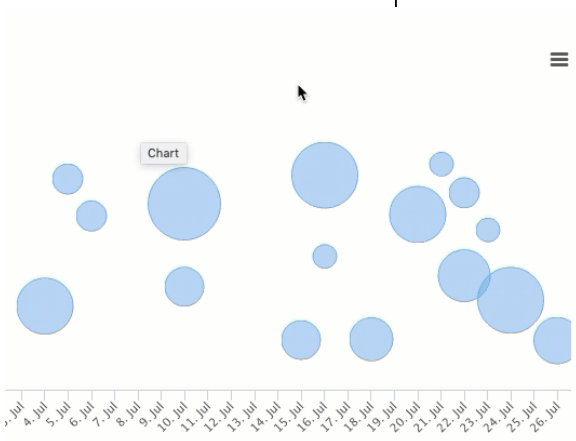
Title	Type	Description
		View the number of stories in each state by their arrival to a state state, and its departure from this state. The Epic Cumulative Flow Diagram report comprises the followin be hidden or displayed based on your preference: • **Ready**: Indicates the number of stories of the epic that are rea on. • **Work in Progress**: Indicates the number of stories of the epic development. • **Ready for Testing**: Indicates the number stories of the epic tha tested. • **Testing**: Indicates the number of stories of the epic that are cu tested. • **Complete**: Indicates the number of stories that are complete. **Note:** Stories in Ready and Cancelled states are not included in th

Cycle Time

Title	Type	Description
Story Cycle Time	Bubble chart 	Identify the time taken for each story in the epic to move from an in-progress state to completion. Each bubble on the graph represents a story. The height of the bubble from the x-axis shows how long that story took to move from an in-progress state to completion. The size of the story bubbles are relative to each other based on their story points. Hovering your mouse cursor over a bubble displays the following details about that story: • Story points • Date on which the story is moved to completion • Total cycle time (in days) of the story • Number of days that the story was in the **Work in progress** state

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Cycle Time (continued)

Title	Type	Description
		• Number of days that the story was in the **Ready for testing** state • Number of days that the story was in the **Testing** state From the Story State section towards the right of the report, you can filter the report to view the cycle time of the stories for the selected states. The chart displays the cycle time for each story as the cumulative sum of all duration of the selected states. If there are too many stories at any area of the chart and the bubbles appear crowded on the report, you can zoom in that particular area of the report for clearer view. 

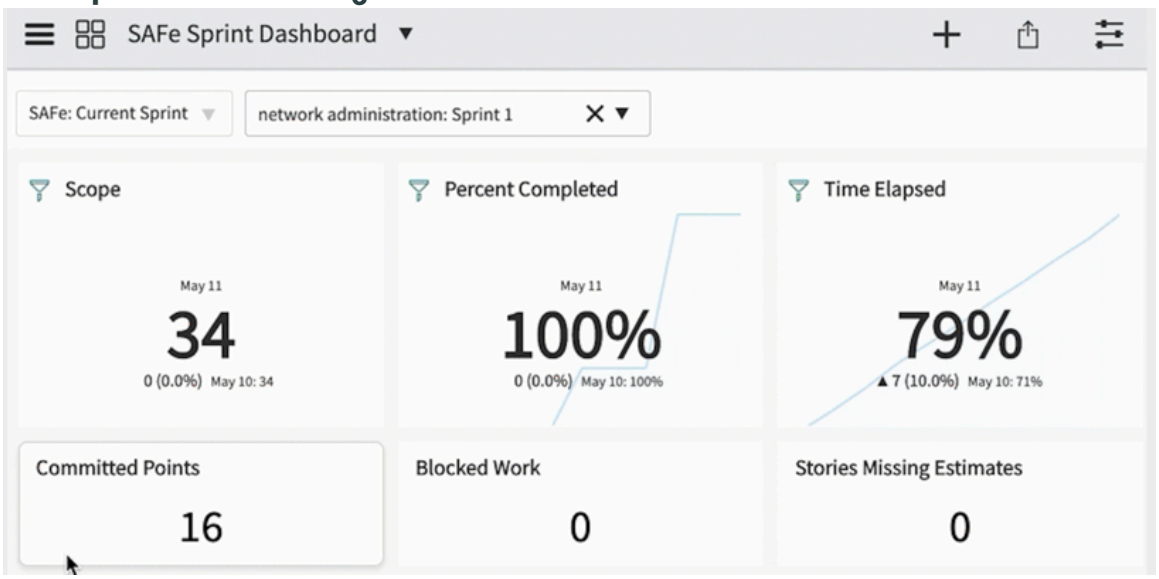
You can customize the Burnup and Cumulative Flow Diagram reports. For more information, see Customizing Essential SAFe dashboard reports.

SAFe Sprint Dashboard

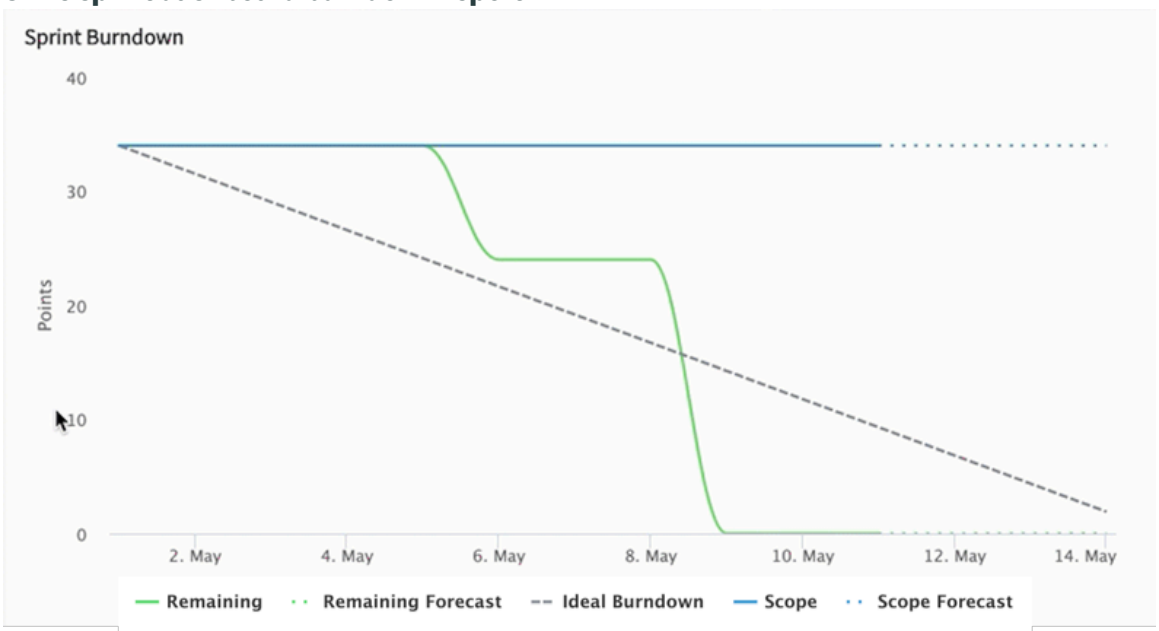
Track the progress of your SAFe stories in the current sprint and forecast sprint completion using the SAFe Sprint Dashboard.

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SAFe sprint dashboard widgets

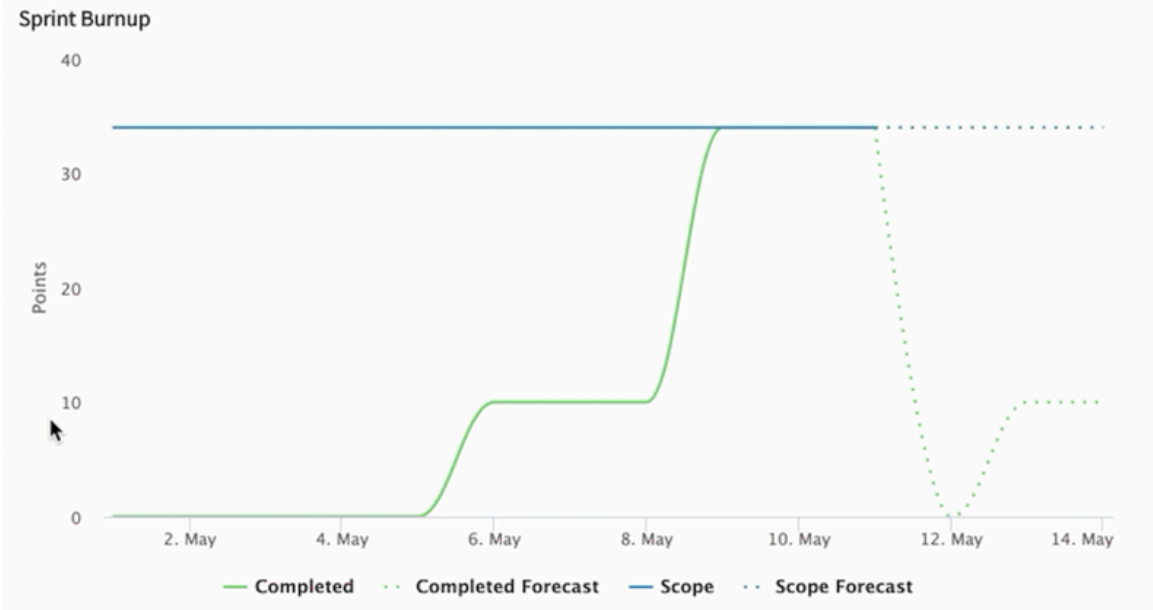


SAFe sprint dashboard burndown report

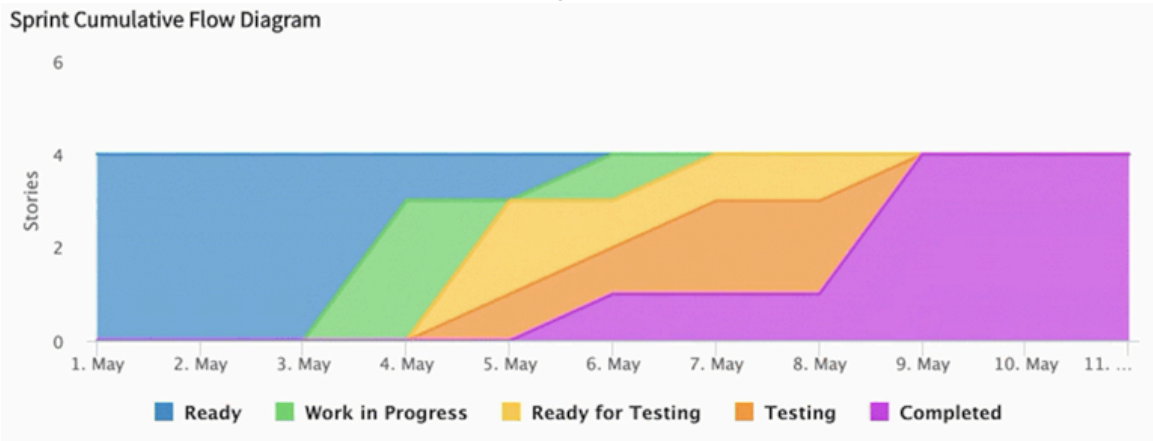


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SAFe sprint dashboard burnup report



SAFe sprint dashboard cumulative flow diagram



The dashboard:

- Displays important details of the sprint such as percentage of work that is complete, time elapsed, and total number of stories that are missing estimates.
- Displays the number of stories of the sprint in their current state and their progress.
- Indicates the scope changes, if any, and trends of those scope changes.
- Indicates how the team needs to progress on stories to achieve the sprint goal.
- Forecasts data showing the likelihood of completing the sprint as planned.

Note:
Canceled stories are not included in any of this data.

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End user and roles

End user and goal	Required role	Benefits
SAFe scrum master: Reviews the sprint burndown trends. Resolves any bottlenecks and targets to complete the sprint on time.	safe_scrum_user	• Analyse the scope changes for the sprint • View current states and analyse the time in each state for the stories of the sprint • Estimate sprint completion dates

Indicators

SAFe: Sum of story points of all stories in the current sprint

Generates the scope series in the Sprint Burndown report. The scope series indicates the amount of work in story points that is planned for the sprint.

SAFe: Sum of story points of active stories in the current sprint

Generates the actual burndown series in the Sprint Burndown report. The actual burndown series indicates the amount of work left (in story points) for completion.

SAFe: Sum of story points of completed stories in current sprint

Generates the percentage of stories completed for the current sprint.

SAFe: Time elapsed in sprint

Calculates the time to be displayed in the Time Elapsed widget.

SAFe: Count of stories in the current sprint

Generates the area series in the Sprint Cumulative Flow Diagram report. It indicates the number of stories in the current sprint.

Breakdowns

- SAFe: Sprint
- SAFe: Current Sprint
- SAFe: State

Widgets

Scope

Indicates the amount of work in story points that is planned for the sprint. This widget lets you see at a glance how much work must be completed to achieve the sprint goal. It also lets you drill down to detail on the stories planned into the sprint.

Percent Completed

Indicates the percentage of work that has been completed in the sprint using story points. This widget lets you see at a glance how much work has been completed in the sprint. Together with the adjacent Time Elapsed widget, these widgets lets you

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easily see whether you are completing work at a rate consistent with achieving the sprint goal on schedule.

Time Elapsed

Indicates the percentage of time that has elapsed between the start date and planned end date of the sprint. Together with the adjacent Percent Completed widget, these widgets let you easily see whether you are completing work at a rate consistent with achieving the sprint goal on schedule.

Committed Points

Indicates the committed scope (in number of story points) of the sprint. Together with the adjacent Scope widget, these widgets let you see difference between the scope committed at the start of the sprint and the current scope of the sprint.

Note:
This widget is not visible by default. You can add it from Reports to your dashboard. For more information, see Edit a responsive dashboard.

Blocked Work

Indicates the amount of work (in story points) in the sprint that is blocked.

Stories Missing Estimates

Indicates the total number of stories in the sprint that are missing estimates. It is required that you use estimates for the other indicators, widgets, and reports on this dashboard to be meaningful.

Note:
If you do not estimate stories, enter a "1" in the **Story Points** field. The other indicators, widgets, and reports will then effectively function by count.

Data visualizations

If you are upgrading from version 1.0.2 or earlier of Performance Analytics Content Pack for Essential SAFe, then install this dashboard from Solution Library to upgrade its layout and access the following visualizations:

- Sprint Burnup
- Sprint Cumulative Flow Diagram

For more information, see Using Solution Library for Essential SAFe dashboards.

Title	Type	Description
Sprint Burndown	Line chart 	Indicates the scope changes, if any, and trends of those scope changes. Indicates the ideal pace of work, how much work is remaining, and if the scope is likely to be completed before the end of the sprint. The Sprint Burndown report comprises the following series that can be hidden or displayed based on your preference:

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Title	Type	Description
		• **Scope**: Indicates the amount of work that is currently planned for the sprint. This can vary if stories are added to or removed from the sprint after it is started. • **Scope Forecast**: Predicts the possibility of scope change for the future dates based on historical changes in the current sprint. • **Ideal Burndown**: Indicates how the team needs to progress on stories to complete the sprint on time. • **Remaining**: Indicates the amount of work left for completion in the sprint. If the actual burndown (Remaining) is above the ideal burndown, it implies that there is more work left than originally estimated. The team is running behind the schedule of the sprint. If the actual burndown (Remaining) is below the ideal burndown, it implies that there is less work left than originally estimated. The team is running ahead of the schedule of the sprint. • **Remaining Forecast**: Predicts the burndown for the future dates based on historical changes in the current sprint.
Sprint Burnup	Line chart 	Shows the sprint burnup trend indicating scope changes. Forecasts future changes in scope and the trend of work completion. The Sprint Burnup report comprises the following series that can be hidden or displayed based on your preference: • **Scope**: Indicates the amount of work that is planned for the sprint. • **Scope Forecast**: Predicts the possibility of scope change for the future dates, which is based on historical data. • **Completed**: Indicates the amount of work completed in the sprint. • **Completed Forecast**: Predicts the burnup for the future dates. It indicates whether you can complete the sprint on time. The prediction is based on historical data.
Sprint Cumulative Flow Diagram	Area  chart	Monitor the progress of all the stories of your sprint between its actual start and end dates. View the number of stories in each state by their arrival to a state, time in this state, and its departure from this state. The Sprint Cumulative Flow Diagram report comprises the following areas that can be hidden or displayed based on your preference: • **Ready**: Indicates the number of stories in the sprint that are ready to start work on. • **Work in Progress**: Indicates the number of stories in the sprint that are in development.

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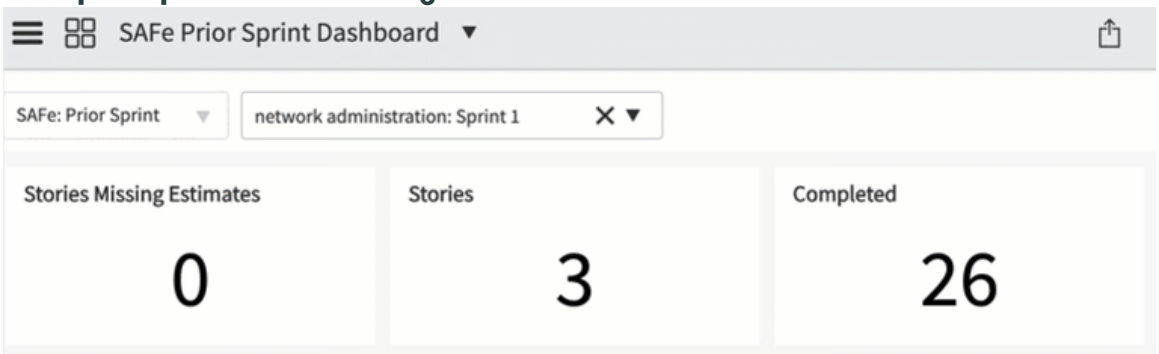
Title	Type	Description
		• **Ready for Testing**: Indicates the number stories in the sprint that are ready to be tested. • **Testing**: Indicates the number of stories in the sprint that are currently being tested. • **Complete**: Indicates the number of stories in the sprint that are complete. **Note:** Stories in Ready and Cancelled states are not included in this report.

You can customize the Burnup, Burndown, and Cumulative Flow Diagram reports. For more information, see Customizing Essential SAFe dashboard reports.

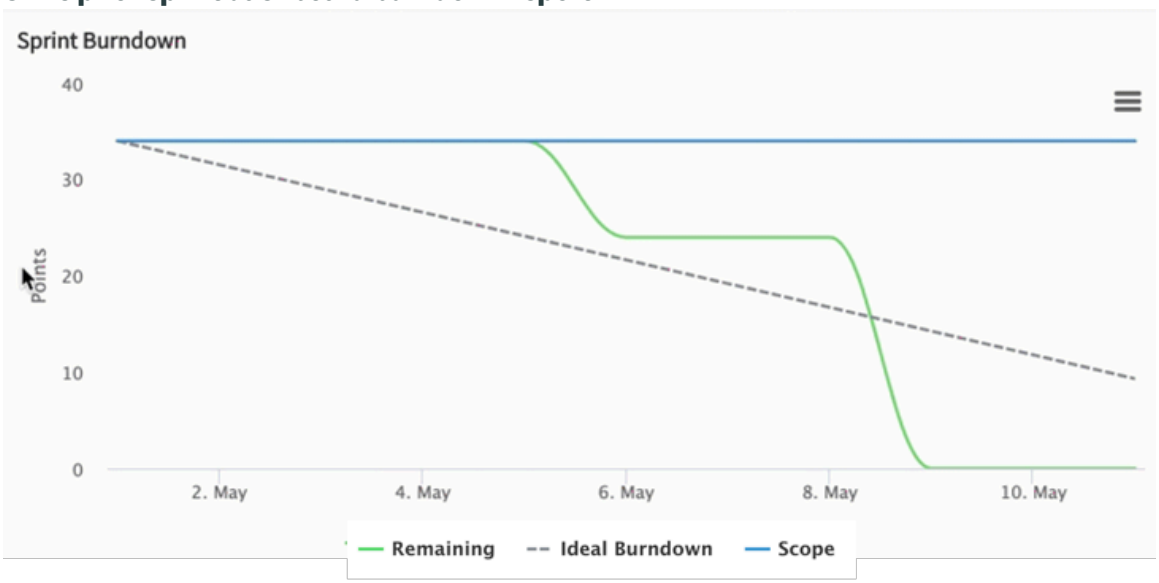
SAFe Prior Sprint Dashboard

The SAFe Prior Sprint Dashboard provides data visualization on scope, actual burnup and burndown, and forecast trends of previous sprints. Analyze the data and plan the work for upcoming sprints.

SAFe prior sprint dashboard widgets



SAFe prior sprint dashboard burndown report



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SAFe prior sprint dashboard burnup report



Note:
Canceled stories are not included in any of this data.

End user and roles

End user and goal	Required role	Benefits
SAFe scrum master: Analyze data on scope, actual burnup and burndown, and forecast trends of previous sprints.	SAFe_scrum_user	• Analyze sprint burndown and burnup trends • Use the data to plan for upcoming sprints

Indicators

SAFe: Sum of story points of all stories in the current sprint

Generates the scope series in the SAFe Sprint Burndown report.

SAFe: Sum of story points of active stories in the current sprint

Generates the actual burndown series in the SAFe Sprint Burndown report.

Breakdowns

- SAFe: Sprint
- SAFe: Prior Sprint

Widgets

Committed points

Indicates the committed scope (in number of story points) of the sprint.

Stories

Indicates the total number of stories that were completed in the previous sprint.

Completed

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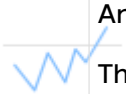
Indicates the amount of work (in story points) that was completed in the previous sprint.

Stories Missing Estimates

Indicates the total number of stories in the previous sprint that were missing estimates.

Data visualizations

If you are upgrading from version 1.0.2 or earlier of Performance Analytics Content Pack for Essential SAFe, then install this dashboard from Solution Library to upgrade its layout and access the Sprint Burnup report. For more information, see Using Solution Library for Essential SAFe dashboards.

Title	Type	Description
Sprint Burndown	Line  chart	Shows the scope and rate of scope change, the ideal rate for work completion, and the actual rate of work completion. Analyze the burndown trends and accordingly plan the workload for an upcoming sprint. The Sprint Burndown report comprises the following series that can be hidden or displayed based on your preference: • **Scope**: Indicates the amount of work that is planned for the sprint. • **Ideal Burndown**: Indicates how the team needs to progress on stories to complete the sprint on time. • **Remaining**: Indicates the amount of work left for completion in the sprint. If Remaining is above the Ideal Burndown, it implies that there is more work left than originally estimated. The team is running behind the schedule of the sprint. If the Remaining is below Ideal Burndown, it implies that there is less work left than originally estimated. The team is running ahead of the schedule of the sprint. Analyze the burndown trends and accordingly plan the workload for an upcoming sprint.
Sprint Burnup	Line  chart	Shows the previous sprint burnup trend indicating scope changes. Analyze future changes the trend of team's work completion. The Sprint Burnup report comprises the following series that can be hidden or displayed based on your preference: • **Scope**: Indicates the amount of work that is planned for the sprint. • **Completed**: Indicates the amount of work completed in the sprint.

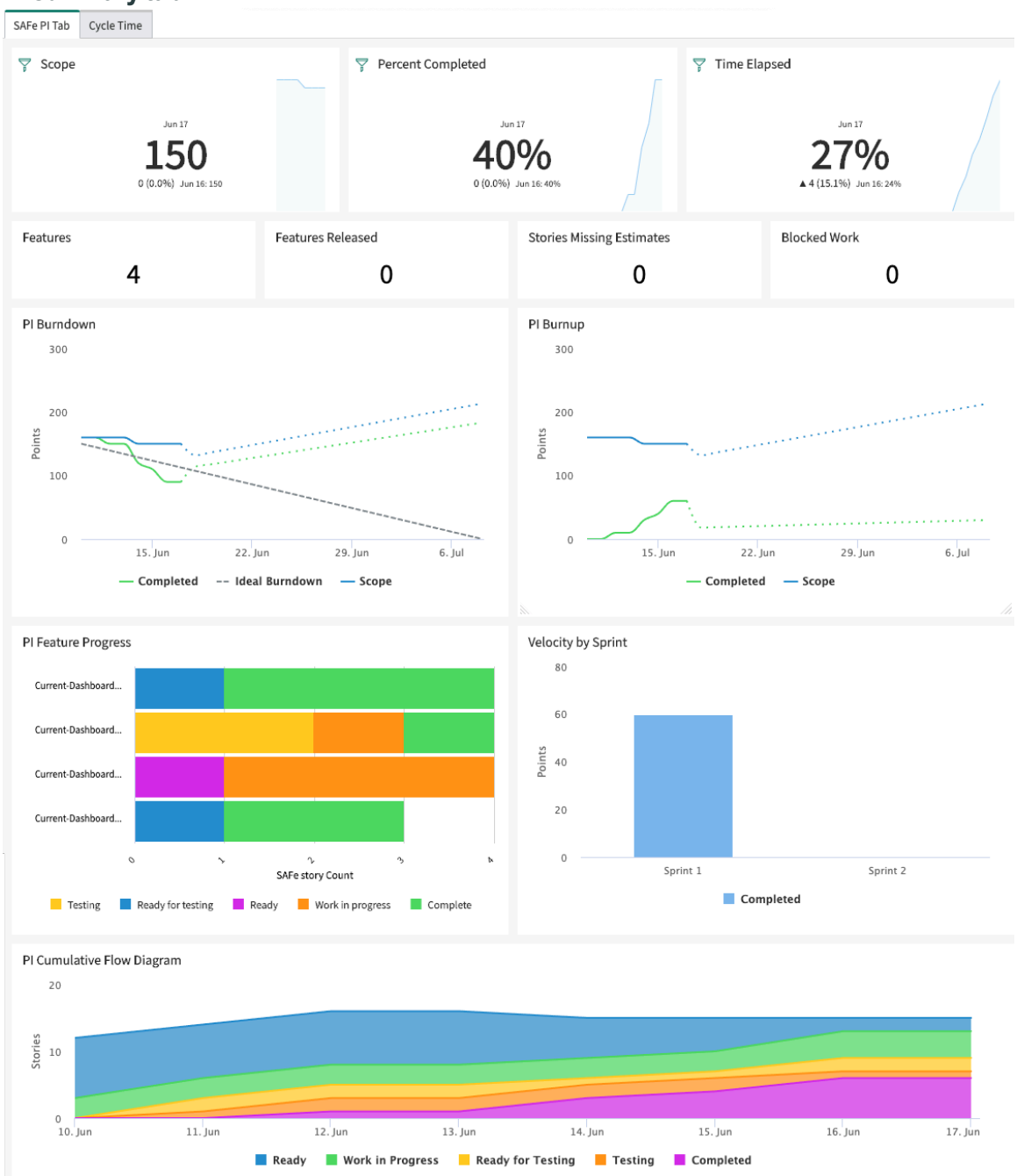
You can customize the Burnup and Burndown reports. For more information, see Customizing Essential SAFe dashboard reports.

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SAFe PI Dashboard

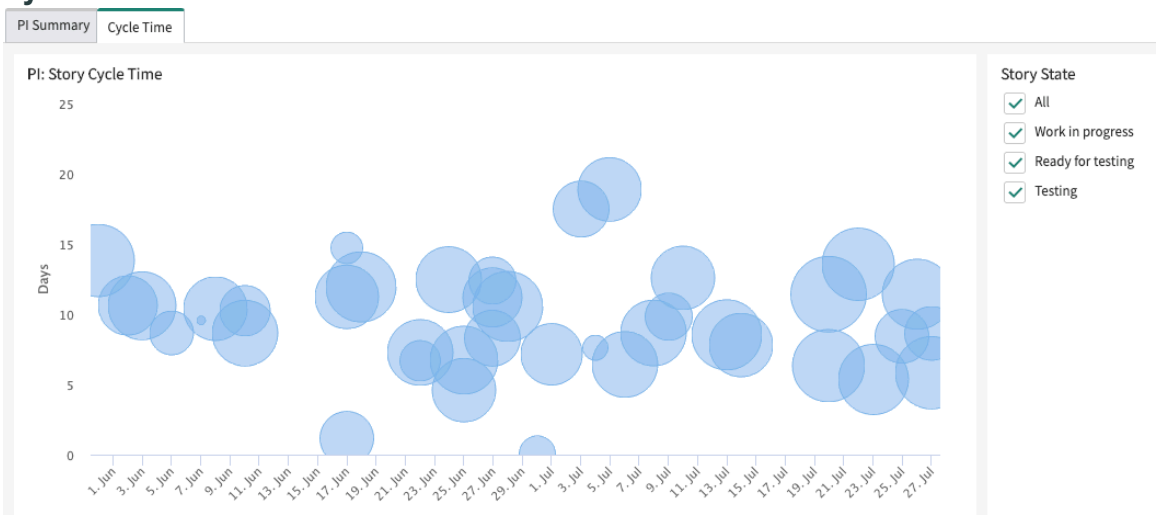
The SAFe PI Dashboard allows you to track the progress of your features in the current program increment (PI).

PI Summary tab



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Cycle Time tab



The SAFe PI dashboard provides the following details:

- Displays important details of the PI such as percentage of work that is complete, time elapsed, and total number of stories that are missing estimates.
- Displays the number of stories of the PI in their current state and their progress.
- Indicates the scope changes, if any, and trends of those scope changes.
- Indicates the pace at which the ART members are completing features that are planned for the PI.
- Forecasts data showing the likelihood of completing the PI as planned.
- Shows time elapsed for the stories of the PI to go from an in-progress state to a completed state.

End user and roles

End user goal with required role

End user and goal	Required role
SAFe ART user: Track the progress of your stories that are planned for the PI. Resolve any bottlenecks and target to complete the PI on time.	safe_scrum_user

Indicators

SAFe: Count of all stories in the current PI

Generates the area series the PI Cumulative Flow Diagram report, which indicates the number of stories of the current PI by state.

SAFe: Sum of story points of all stories in the current PI

Generate the scope series in the PI Burndown report. This series indicates the amount (in story points) of work planned for the PI.

SAFe: Sum of story points of completed stories in the current PI

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Generates the actual burndown series in the PI Burndown report, and the completed series in the PI Burnup report. These series indicate the amount of work (in story points) that has been completed for the PI.

SAFe: Sum of story points of active stories in the current PI

Generates the scope series in the PI Burndown and PI Burnup reports. The scope series indicates the amount of work (in story points) that is planned for the PI.

SAFe: Time elapsed in the PI

Calculates the time to be displayed in the Time Elapsed widget.

Breakdowns

- SAFe: PI
- SAFe: State

Widgets

Scope

Indicates the amount of work in story points that is planned for the PI. This widget lets you see at a glance how much work must be completed to achieve the PI goal. It also lets you drill down to detail on the stories that are planned for completion in the PI.

Percent Completed

Indicates the percentage of work that has been completed in the PI using story points. This widget lets you see at a glance how much work has been completed in the PI. Together with the adjacent Time Elapsed widget, these widgets let you easily see whether you are completing work at a rate consistent with achieving the PI goal on schedule.

Time Elapsed

Indicates the percentage of time that has elapsed between the start date and planned end date of the PI. Together with the adjacent Percent Completed widget, these widgets let you easily see whether you are completing work at a rate consistent with achieving the PI goal on schedule.

Features

Indicates the total number of features that are planned for completion in the PI.

Features Released

Indicates the total number of features in the PI that have been completed.

Stories Missing Estimates

Indicates the total number of stories in the PI that are missing estimates. It is required that you use estimates for the other indicators, widgets, and reports on this dashboard to be meaningful.

> **Note:**
> If you do not estimate stories, enter a "1" in the **Story Points** field. The other indicators, widgets, and reports will then effectively function by count.

Blocked Work

Indicates the amount of work (in story points) in the PI that is blocked.

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Data visualizations

If you are upgrading from version 1.0.2 or earlier of Performance Analytics Content Pack for Essential SAFe, then install this dashboard from Solution Library to upgrade its layout and access the following visualizations:

- PI Cumulative Flow Diagram
- Story Cycle Time

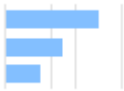
For more information, see Using Solution Library for Essential SAFe dashboards.

SAFe PI Summary

Title	Type	Description
PI Burndown	Line chart 	Indicates the scope changes, if any, and trends of those scope cha the ideal pace of work, how much work is remaining, and if the sco completed before the end of the PI. The PI Burndown report compr series that can be hidden or displayed based on your preference: • **Scope**: Indicates the amount of work that is planned for the PI. • **Scope Forecast**: Predicts the possibility of scope change for the the PI. This prediction is based on historical data. • **Ideal Burndown**: Indicates how the ART members need to progr deliver the PI on time. • **Remaining**: Indicates the amount of work completed in the PI. • **Remaining Forecast**: Predicts the burndown for the future dates indicates whether you can deliver the PI on time.
PI burnup	Line chart 	Analyse the burnup trends, and estimate when the PI work is likely The PI burnup report comprises the following series that can be hi based on your preference: • **Scope**: Indicates the amount of work that is planned for the PI. • **Scope Forecast**: Predicts the possibility of scope change for the This prediction is based on historical data. • **Completed**: Indicates the amount of work in the PI that is comple • **Completed Forecast**: Predicts the burnup for the future dates in indicates whether you can complete the PI on time. **Note:** The point at which the Completed Forecast series intersects w the Scope Forecast series is a predictor for when the PI might the Completed Forecast series and the Scope Forecast series to ever intersect, it is a warning that scope is being added fast being completed.
PI Feature Progress	Horizontal bar chart	Analyse the progress of every feature of the PI, by viewing the cou segregated by their state.

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SAFe PI Summary (continued)

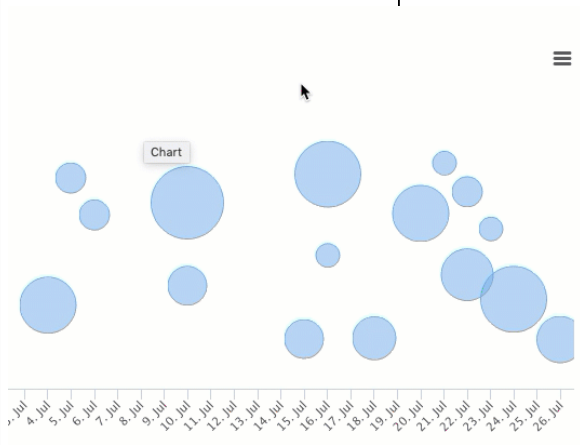
Title	Type	Description
		
Velocity by Sprint	Bar chart 	View the velocity of the ART members across PIs. Understand if the are achieving a stable, predictable velocity over sprints, and meeti commitments.
PI Cumulative Flow Diagram	Area chart 	Monitor the progress of all the stories of your PI between its actual dates. View the number of stories in each state by their arrival to a state, t and its departure from this state. The PI Cumulative Flow Diagram report comprises the following are hidden or displayed based on your preference: • **Ready**: Indicates the number of stories of the PI that are ready to • **Work in Progress**: Indicates the number of stories of the PI that a development. • **Ready for Testing**: Indicates the number stories of the PI that are tested. • **Testing**: Indicates the number of stories of the PI that are current • **Complete**: Indicates the number of stories that are complete. **Note:** Stories in Ready and Cancelled states are not included in this

Cycle Time

Title	Type	Description
Story Cycle Time	Bubble chart 	Identify the time taken for each story in the PI to move from an in-progress state to completion. Each bubble on the graph represents a story. The height of the bubble from the x-axis shows how long that story took to move from an in-progress state to completion. The size of the story bubbles are relative to each other based on their story points.

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Cycle Time (continued)

Title	Type	Description
		Hovering your mouse cursor over a bubble displays the following details about that story: • Story points • Date on which the story is moved to completion • Total cycle time (in days) of the story • Number of days that the story was in the **Work in progress** state • Number of days that the story was in the **Ready for testing** state • Number of days that the story was in the **Testing** state From the Story State section towards the right of the report, you can filter the report to view the cycle time of the stories for the selected states. The chart displays the cycle time for each story as the cumulative sum of all duration of the selected states. If there are too many stories at any area of the chart and the bubbles appear crowded on the report, you can zoom in that particular area of the report for a clearer view. 

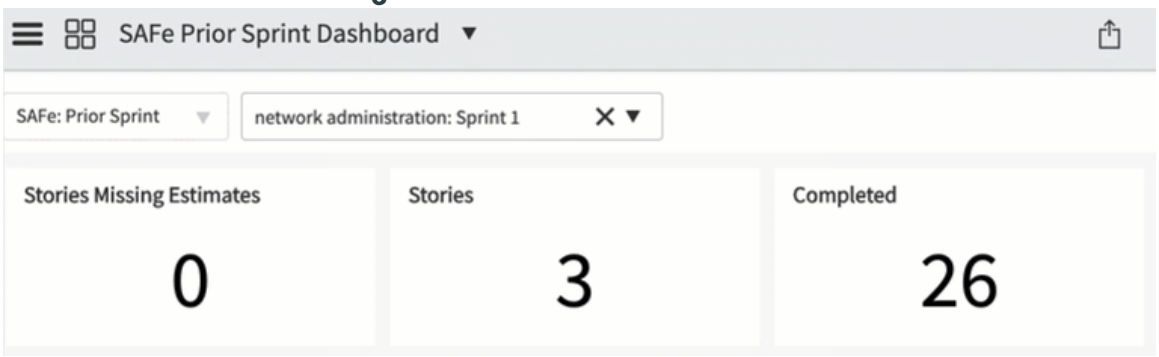
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You can customize the Burnup, Burndown, and Cumulative Flow Diagram reports. For more information, see Customizing Essential SAFe dashboard reports.

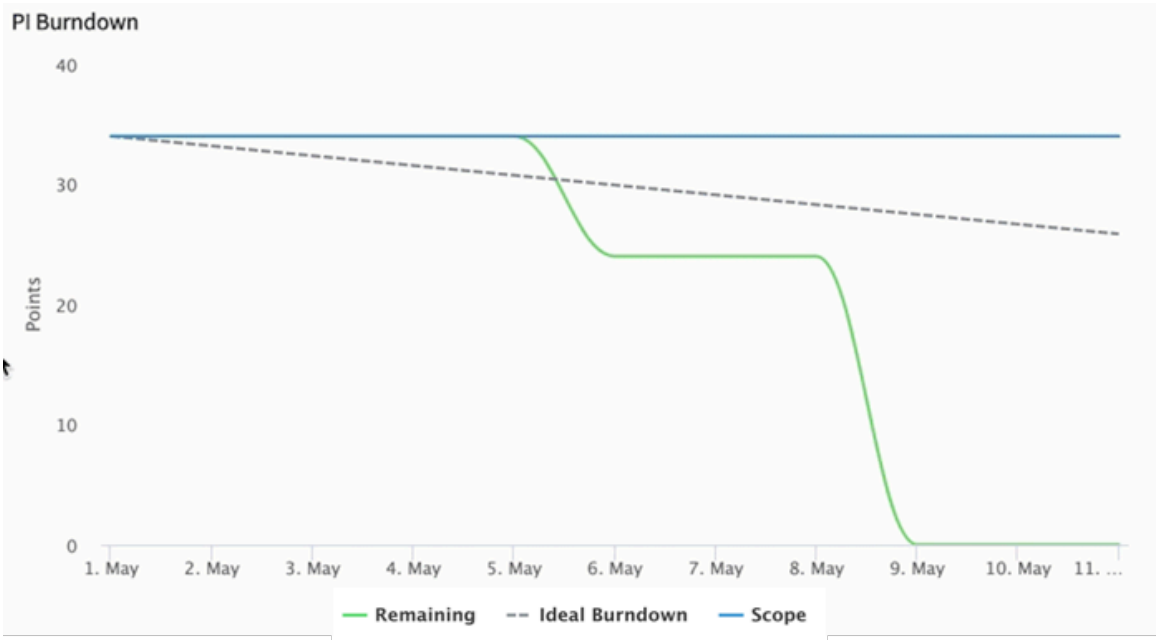
SAFe Prior PI Dashboard

The SAFe Prior PI Dashboard provides data visualization on scope, actual burndown, and forecast trends of previous program increments (PI). Analyze the data and plan the work for upcoming PIs.

SAFe Prior PI dashboard widgets

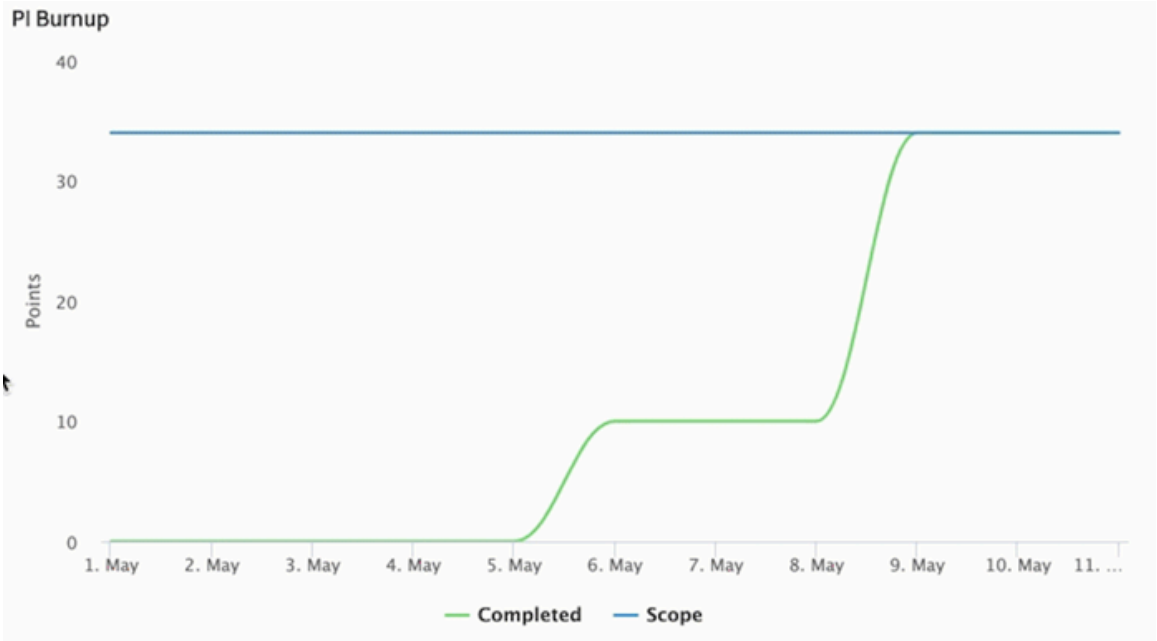


SAFe Prior PI burnup report



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SAFe Prior PI burnup report



End user and roles

End user and goal	Required role
SAFe ART user: Analyze the scope, burndown, and forecast trends of previous program increments.	safe_scrum_user

Indicators

SAFe: Sum of story points of completed stories in the active PIs

Generates the actual burndown series in the PI Burndown report, and the completed series in the PI Burnup report.

SAFe: Sum of story points of all stories in active PIs

Generates the scope series in the PI Burndown and PI Burnup reports.

Breakdowns

SAFe: Prior PI.

Widgets

Features

Indicates the total number of features that were planned for completion in the previous PI.

Completed

Indicates the total number of features that were completed in the previous PI.

Stories Missing Estimates

Indicates the total number of stories in the previous PI that were missing estimates.

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Data visualizations

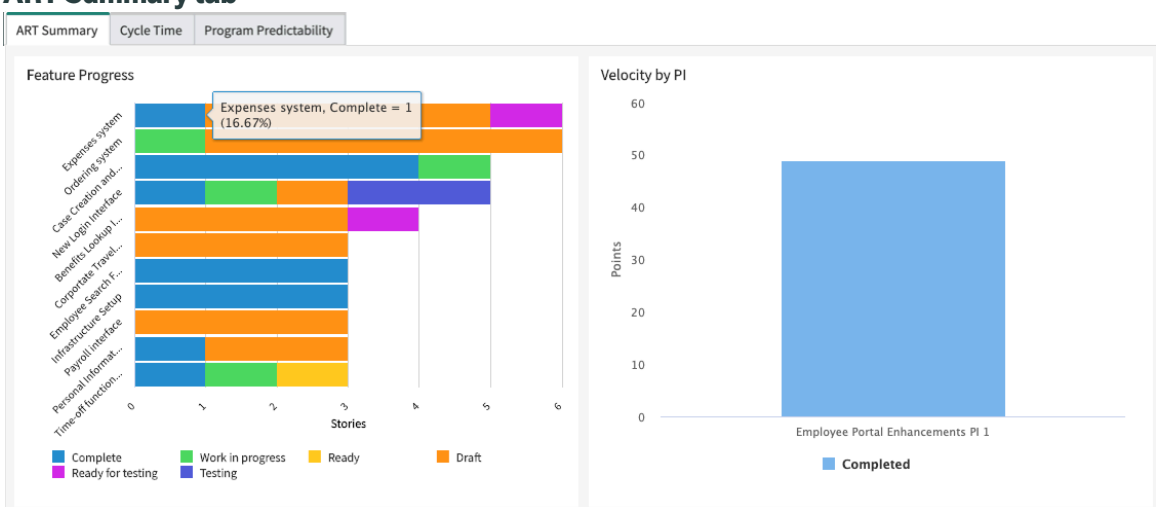
Title	Type	Description
PI Burnup	Line chart 	Analyze the burnup trends of the previous PI.
PI Burndown	Line chart 	View the scope and rate of scope change, the ideal rate for work completion, and the actual rate of work completion. Analyze the burndown trends and accordingly plan the workload for an upcoming PI.
PI Velocity Chart	Bar chart 	View the velocity of the ART members for the previous PI and plan the workload for an upcoming PI.

You can customize the Burnup and Burndown reports. For more information, see Customizing Essential SAFe dashboard reports.

SAFe ART Dashboard

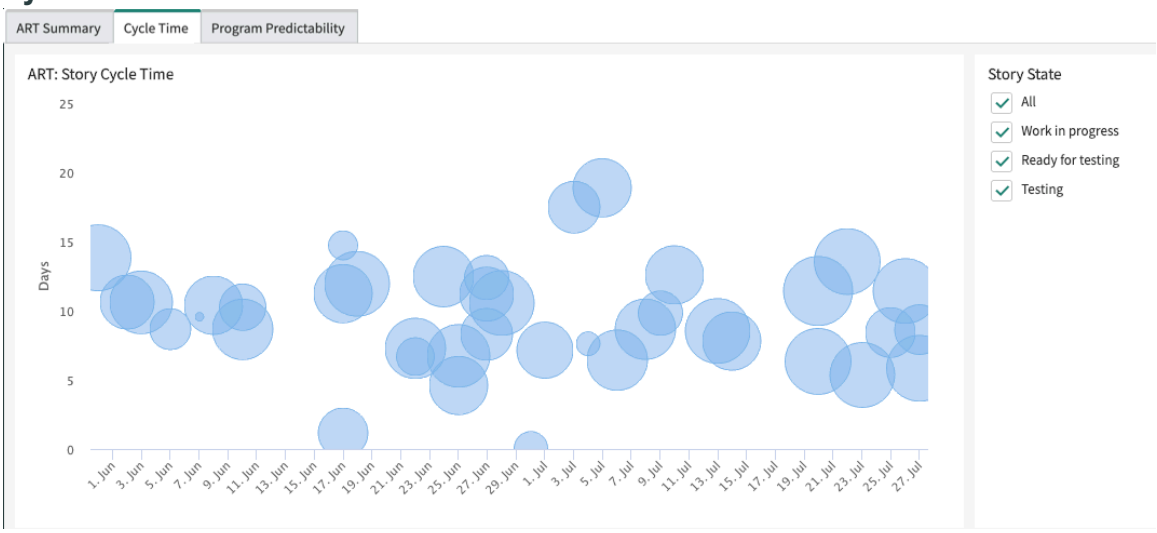
Visualize how the ART members are progressing on features and program increments (PIs) over a given period using the SAFe ART dashboard. Gain insight on the overall velocity of the ART members, historical performance of the ART on the PI objectives so that you can plan the work accordingly for the upcoming program increments.

ART Summary tab

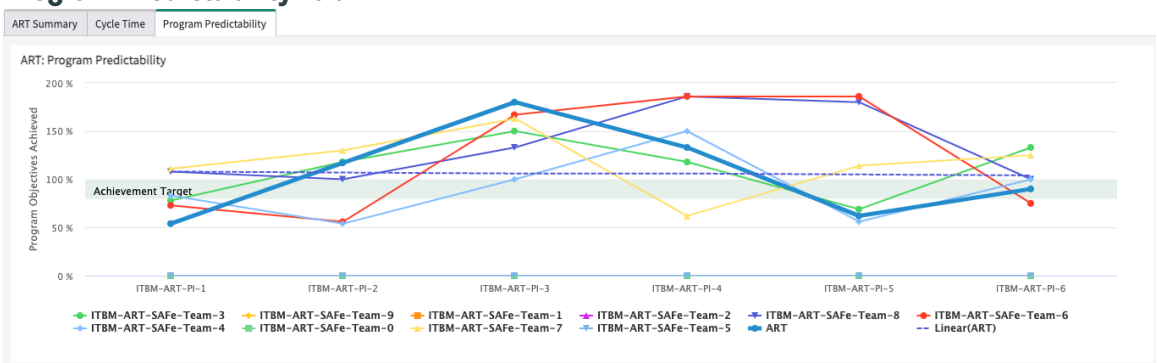


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Cycle Time tab



Program Predictability Tab



End user and roles

End user goal with required role

End user and goal	Required role
SAFe ART user: View how the ART members are progressing on features and PIs.	safe_scrum_user

Data visualizations

If you are upgrading from version 1.0.2 or earlier of Performance Analytics Content Pack for Essential SAFe, then install this dashboard from Solution Library to upgrade its layout and access the Story Cycle Time report. For more information, see Using Solution Library for Essential SAFe dashboards.

ART Summary

Title	Type	Description
Feature Progress	Horizontal bar chart	View the progress of all the features that the ART members are working on.

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ART Summary (continued)

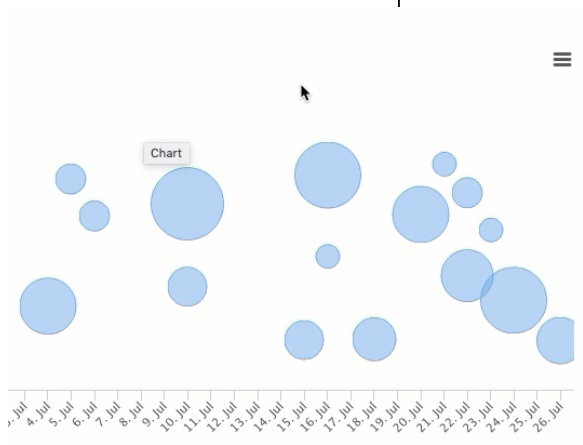
Title	Type	Description
		
Velocity by PI	Bar chart 	View the velocity of the ART across various PIs. Understand if the ART is achieving a stable, predictable velocity.

Cycle Time

Title	Type	Description
Story Cycle Time	Bubble chart 	Identify the time taken for each story in the ART to move from an in-progress state to completion. Each bubble on the graph represents a story. The height of the bubble from the x-axis shows how long that story took to move from an in-progress state to completion. The size of the story bubbles are relative to each other based on their story points. Pointing your mouse cursor over a bubble displays the following details about that story: • Story points • Date on which the story is moved to completion • Total cycle time (in days) of the story • Number of days that the story was in the **Work in progress** state • Number of days that the story was in the **Ready for testing** state • Number of days that the story was in the **Testing** state

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Cycle Time (continued)

Title	Type	Description
		From the Story State section towards the right of the report, you can filter the report to view the cycle time of the stories for the selected states. The chart displays the cycle time for each story as the cumulative sum of all duration of the selected states. If there are too many stories at any area of the chart and the bubbles appear crowded on the report, you can zoom in that particular area of the report for a clearer view. 

Title	Type	Description
ART: Program Predictability	 Line chart	Track the historical performance of the ART on achieving their PI objectives. The series in this report show the performance of the ART as whole and also the performance of each team of the ART. The horizontal axis shows the completed PIs and the vertical axis shows the range of business value achieved in percentage (%). Each series is the representation of the business

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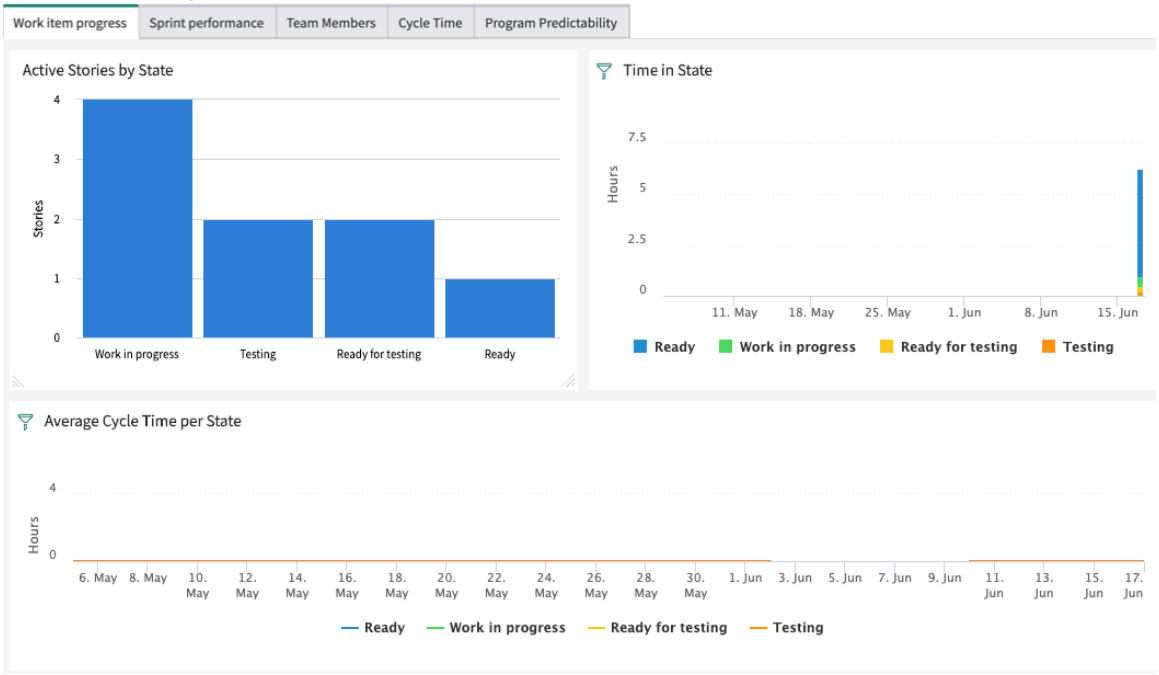
Title	Type	Description
		value achieved, which is calculated from the planned and actual business values of the PI objectives. For more information, see SAFe PI objectives. From the chart, you can see which teams are consistently achieving between 80% and 100% of the set PI objectives, which is the ideal range according to SAFe. The Linear (ART) dotted-line series on the chart provides a linear regression on the business value achieved for the ART. This series serves as an indication of how the scores of the business value achieved are trending. Pointing your mouse cursor at a data point on any of the series gives you the numeric value of business value achieved. • Clicking any of the data points for a PI on the ART series lets you drill down and see the list of PI objectives that are used to plot the chart for the PI which you clicked. Filtering the list by setting the Type column to **Program** displays the PI objectives only for the ART. • Clicking any of the data points for a PI on a team series lets you drill down and see the list of PI objectives that are used to plot the chart for the PI which you clicked. The objectives shown in this list are only for the selected team.

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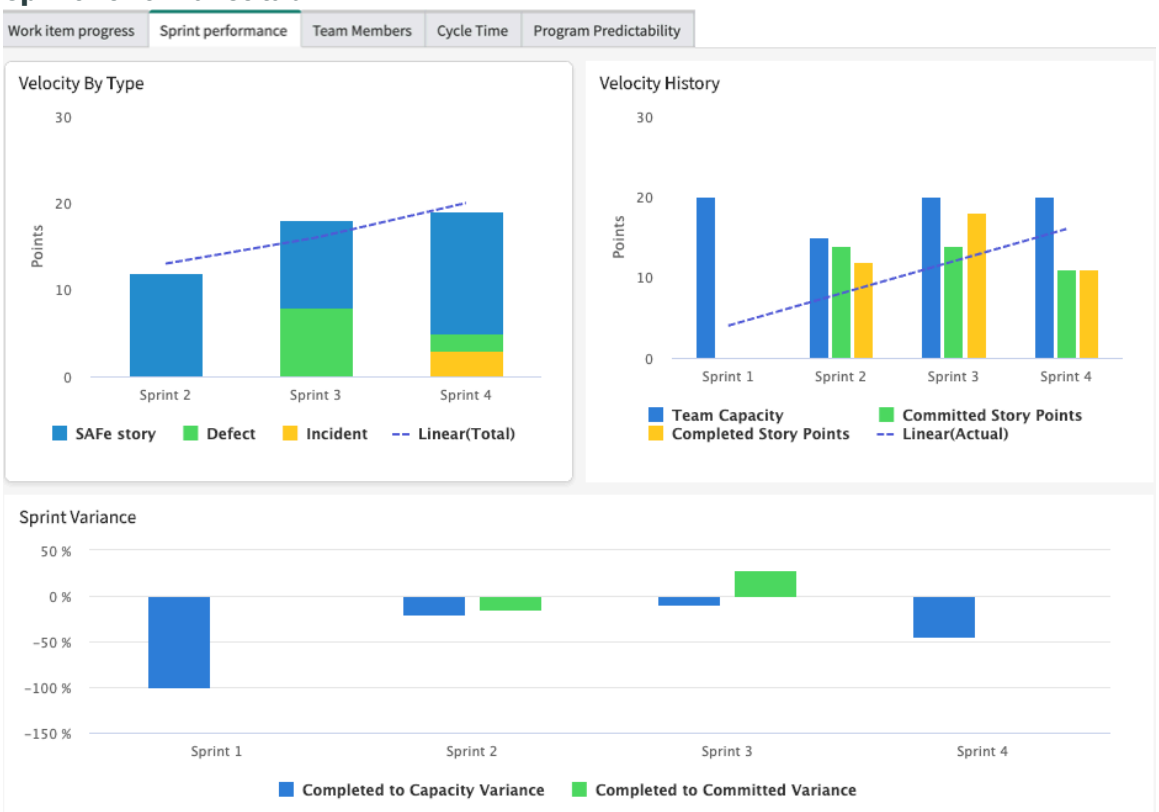
SAFe Team Dashboard

Visually analyze how a team is progressing on stories over a given period. Gain insight on the overall velocity of the team and helps you plan the team's capacity for the upcoming sprints and program increments (PIs). In addition, this dashboard provides details of all the team members.

Work item progress tab

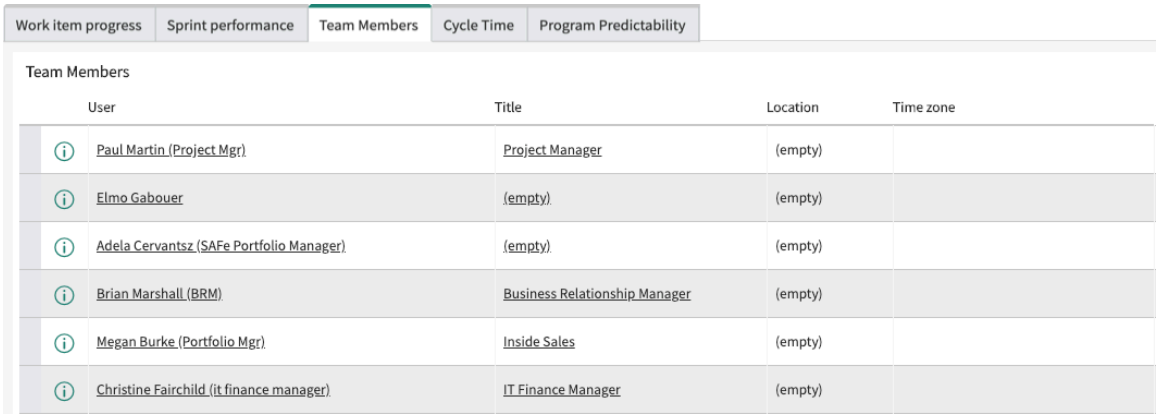


Sprint Performance tab

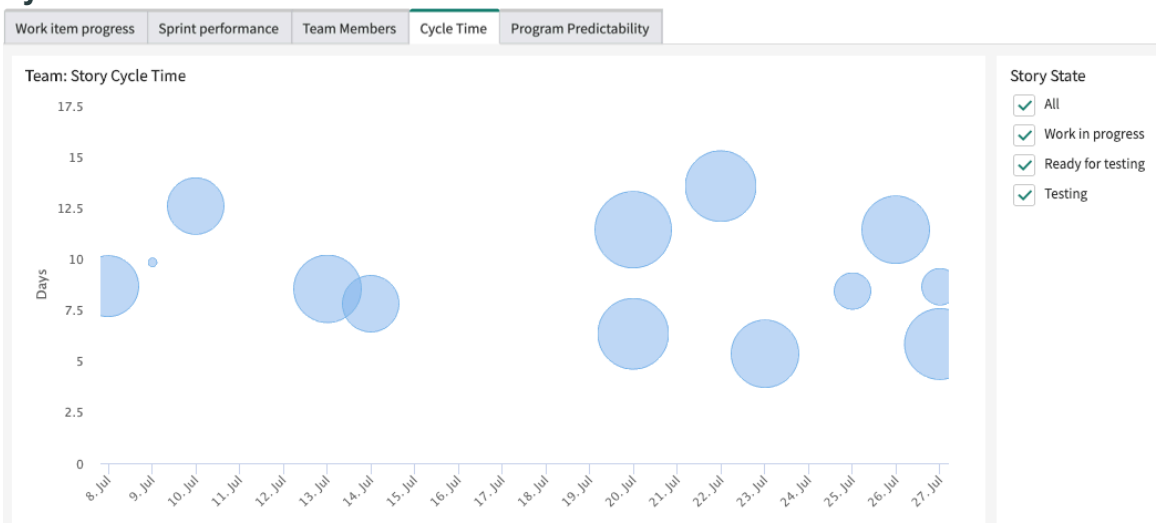


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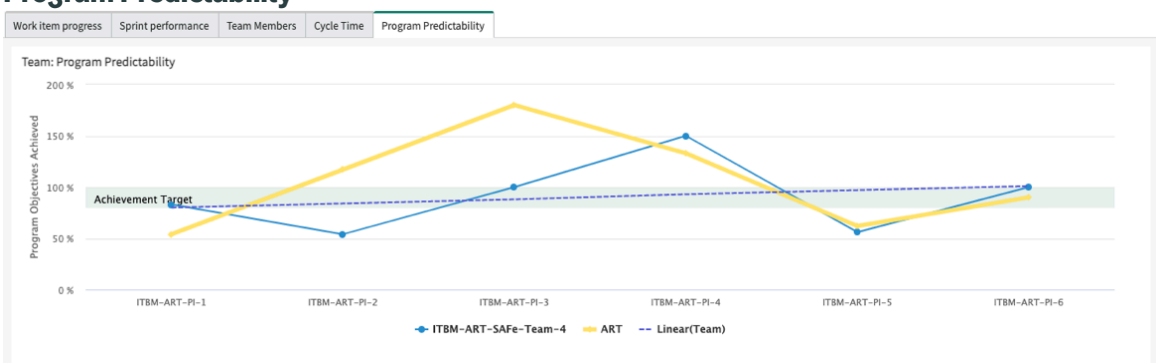
Team Members tab



Cycle Time tab



Program Predictability



End user and roles

End user goal with required role

End user and goal	Required role
SAFe scrum master: View how your team is progressing on stories.	safe_scrum_user

Indicators

SAFe: Average Story State Duration

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Generates data that is displayed in the Average Cycle Time per State report.

SAFe: Story State Duration

Generates data that is displayed in the Time in State report.

Breakdowns

- SAFe: State
- SAFe: Team

Data visualizations

The Team Dashboard visualizations are segregated into the following tabs:

- Work item progress: Reports of Active Stories by State, Time in State, and Average Cycle Time per State
- Sprint Performance: Reports of Velocity History and Sprint Variance
- Team Members: List of all the members of the team

> **Note:**
> For existing customers who upgrade to the latest version, the list of the team members appears in both the Work item progress and Team Members tabs but only one of these locations would display the accurate information. You can remove this widget from the Work item progress tab to avoid this issue. For more information on how to remove a widget, see Edit a responsive dashboard.

- Cycle Time: Report of the story cycle for the team.
- Program Predictability: Report of the team's historical performance in meeting the PI objectives.

If you are upgrading from version 1.0.2 or earlier of Performance Analytics Content Pack for Essential SAFe, then install this dashboard from Solution Library to upgrade its layout and access the following reports:

- Velocity History
- Velocity by Type
- Sprint Variance
- Story Cycle Time

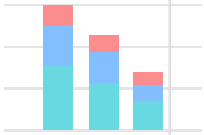
For more information, see Using Solution Library for Essential SAFe dashboards.

Work item progress

Title	Type	Description
Active Stories By State	Bar chart 	View the total number of stories in each state of a story, for example, testing, work in progress, and testing.
Time in State	Stacked bar chart	View the time in hours that the team spends in each state of a story.

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Work item progress (continued)

Title	Type	Description
		
Average Cycle Time per State	Line chart 	View how the work in progress is trending over time and what are the most significant cycle times.

Sprint Performance

Title	Type	Description
Velocity History	Grouped bar chart 	Gain an insight on the overall velocity of the team for the past 10 sprints. Understand if the team is achieving a stable, predictable velocity, and is meeting the commitments. The Team Velocity History report comprises the following series per sprint that can be hidden or displayed based on your preference: • **Team Capacity**: Indicates the team capacity (in story points) for the sprint. • **Committed Story Points**: Indicates the number of story points committed by the team for the sprint. • **Completed Story Points**: Indicates the number of story points completed by the team for the sprint. • **Average Completed Points**: Indicates the average number of story points completed by the team for the sprint. • **Linear (Actual)**: Indicates if the amount of completed

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Sprint Performance (continued)

Title	Type	Description
		work is trending up, trending down, or relatively stable over sprints.
Velocity by Type	Stacked bar chart 	Analyze the way your team's velocity changes over time and compare the team's strategic workload with operational or other types of workload. The bar charts have two stacks that show the sum of the story points of the following types of completed stories: • Regular stories • Stories added to the unified backlog from the items in the triage board Clicking any bar would take you to its corresponding sprint details. Data displayed in this report is of the past 10 sprints with the earliest sprint on the left. **Note:** This report is not available by default. You can add it from Scrum custom charts to your dashboard. For more information, see Edit a responsive dashboard.
Sprint Variance	Grouped bar chart 	Analyze the percentage variance of the team compared to the capacity and committed points, for the past 10 sprints. The Team Sprint Variance report comprises the following series per sprint that can be hidden or displayed based on your preference:

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Sprint Performance (continued)

Title	Type	Description
		• **Completed to Capacity**: Indicates the percentage of completed work compared to the expected capacity for the sprint. • **Completed to Committed**: Indicates the percentage of completed work compared to the committed work of the team for the sprint.

Team Members

Title	Type	Description
Team Members	List	View the details of all team members.

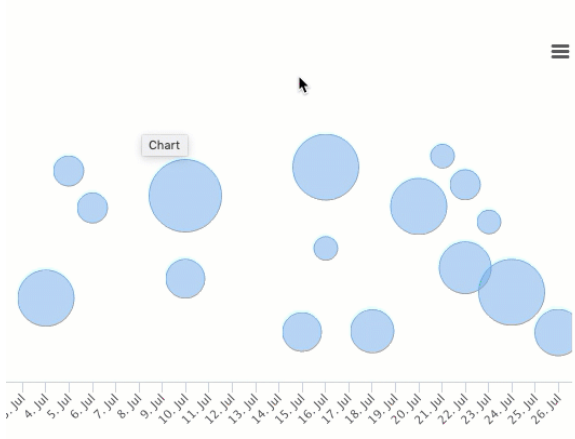
Cycle Time

Title	Type	Description
Story Cycle Time	Bubble chart 	Identify the time taken for each story, which the team has worked on, to move from an in-progress state to completion. Each bubble on the graph represents a story. The height of the bubble from the x-axis shows how long that story took to move from an in-progress state to completion. The size of the story bubbles are relative to each other based on their story points. You can compare the cycle times of stories with different story points and analyze the trend in the time taken by the team to complete them. Identify the stories that took longer to complete and analyze the reasons so that you can chart an action plan to reduce the team's cycle time in the future.

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Cycle Time (continued)

Title	Type	Description
		Pointing your cursor over a bubble displays the following details about that story: • Story points • Date on which the story is moved to completion • Total cycle time (in days) of the story • Number of days that the story was in the **Work in progress** state • Number of days that the story was in the **Ready for testing** state • Number of days that the story was in the **Testing** state From the Story State section toward the right of the report, you can filter the report to view the cycle time of the stories for the selected states. The chart displays the cycle time for each story as the cumulative sum of all duration of the selected states. If there are too many stories at any area of the chart and the bubbles appear crowded on the report, you can zoom in that particular area for a clearer view.



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Cycle Time (continued)

Title	Type	Description
		Note: The stories shown in this chart are the ones that the team has completed in the past 30 days.

Title	Type	Description
Team: Program Predictability	Line chart 	Track the historical performance of the team on achieving their PI objectives. The series in this report show the performance of the team, and the ART that this team belongs to, over multiple PIs. The horizontal axis shows the completed PIs and the vertical axis shows the range of business value achieved in percentage (%). Each series is the representation of the business value achieved, which is calculated from the planned and actual business values of the PI objectives. For more information, see SAFe PI objectives. From the chart, you can if the team is consistently achieving between 80% and 100% of the set PI objectives, which is the ideal range according to SAFe. The Linear (Team) dotted-line series on the chart provides a linear regression on the business value achieved for the team. This series serves as an indication of how the scores of the business value achieved are trending. Pointing your cursor at a data point on any of the series gives you the numeric value of business value achieved.

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Title	Type	Description
		• Clicking any of the data points for a PI on the ART series lets you drill down and see the list of PI objectives that are used to plot the chart for the PI that you clicked. Filtering the list by setting the Type column to **Program** displays the PI objectives only for the ART. • Clicking any of the data points for a PI on a team series lets you drill down and see the list of PI objectives that are used to plot the chart for the PI that you clicked. The objectives shown in this list are only for the selected team.

Customizing Essential SAFe dashboard reports

Customize the Burnup, Burndown, and Cumulative Flow Diagram reports of your dashboards according to the custom states of your SAFe stories.

- Configure indicators to reflect your customizations.

  For example, if there are any new states introduced to the SAFe story table, then the corresponding indicators and indicator sources for the story table that rely on the **State** field must be updated as well.

  For more information, see Customize indicators of your Essential SAFe dashboard reports.

- Update or clone UI scripts for modifications to use your own indicators.

  Add customizations by overriding methods in empty implementation (Impl) classes of UI scripts such as SafeAreaChartImpl and SafeVelHistoryImpl.

  For more information, see Update UI scripts to use your indicators for Essential SAFe dashboards.

Customize indicators of your Essential SAFe dashboard reports

Configure indicators to reflect your customizations in Essential SAFe dashboards.

Before you begin
Role required: admin or pa_admin

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Procedure

1. Navigate to **All** > **Performance Analytics** > **Indicators** > **Automated Indicators**.
2. Search for and open the required indicator.
   For example, if you want to customize the SAFe Burnup report, open SAFe: Sum of story points of all stories in the feature in current sprint from the list of indicators.
3. In the Additional conditions section, modify the conditions according to your preferences.
4. Click **Update**.

Update UI scripts to use your indicators for Essential SAFe dashboards

Customize UI scripts by overriding methods in empty implementation (Impl) classes.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System UI** > **UI Scripts**.
2. Search for and open the required UI script.
   For example, if you want to customize the SAFe Sprint Cumulative Flow Diagram report, open SAFeAreaChartImpl from the list of UI scripts.
3. Overwrite the base implementation according to your preferences.
4. Click **Update**.

Customize story states of your Essential SAFe dashboard reports

Configure story states to reflect your customizations on the Essential SAFe dashboards.

Before you begin
Role required: admin or pa_admin

Procedure

1. Navigate to **All** > **Scaled Agile Framework (SAFe)** > **Stories**.
2. Open a story to which you would like to add the custom states.
3. Right-click **State** and select **Configure Choices** from the drop-down menu.
4. In the **New item text** field, enter the new custom state name.
5. In the **Numeric value** field, enter any corresponding number.
6. Click **Add**.
   The new state appears in the Selected list.
7. Click **Save**.

Work Progress Status for SAFe

The Work Progress Status for SAFe application provides you with indicators such as estimated completion date and progress status (green, yellow, red) for all your SAFe epics and features.

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Important:

Starting with the Xanadu release, Portfolio SAFe, Essential SAFe, Performance Analytics Content Pack for Essential SAFe, Work Progress Status for SAFe, Agile - Scaled Agile Framework - Unified Backlog, and Read only roles for SAFe plugins are being prepared for future deprecation. These plugins will be hidden and can no longer be activated on new instances but will continue to be supported. Enterprise Agile Planning in Strategic Planning provides the latest experience for this functionality.

For more information on the deprecation process and its impact, see the Application/Plugin Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

As a product owner or a team lead, these indicators help you understand if your SAFe team could complete the work by the planned end dates so that you can adjust your plans accordingly.
As a team member working on SAFe stories, these status indicators help you understand your contribution to the overall work and your progress so that you can review your work strategy if necessary.

Note:
You must enter a value for the **Planned end date** field for a SAFe feature or epic for these work progress status indicators to populate.

Reviewing progress status for SAFe features and epics

Understand if your work would be completed by the planned end dates by reviewing progress status of your SAFe features and epics.

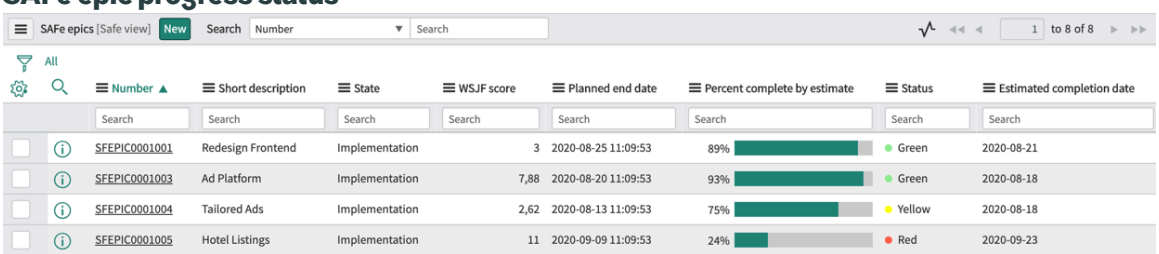
Navigate to **Scaled Agile Framework (SAFe)** > **Epics** or **Scaled Agile Framework (SAFe)** > **Features** and filter the records for your team.

The Status column of the list shows a Green, Yellow, or Red indicator for each record to indicate the following:

- Green: Your work is on track to be complete by the planned end date.
- Yellow: Your work is off track and your plan of execution must be reviewed.
- Red: Your epic or feature is not progressing well and might be at risk of not being complete by the planned end date.

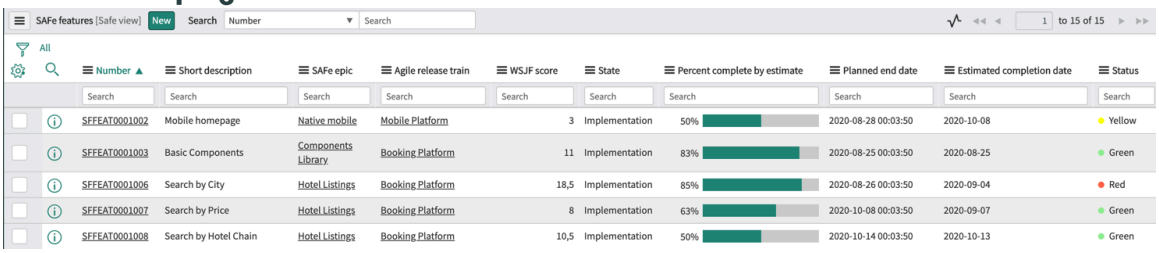
The estimated completion date displays a date with the likelihood of the epic's or feature's completion.

SAFe epic progress status



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SAFe feature progress status



The [SAFe] daily data collection job helps generate the burnup report for your epics and features. Using the data generated for these epic burnup reports, an estimated completion date is determined. You can see that this date is the intersection of Completed and Scope forecast series in the respective burnup reports.

Based on this estimated completion date, the progress status for your SAFe epics and features is determined. Progress status is calculated only under the following conditions:

- Planned end date is populated for the SAFe epic and feature.
- Percentage completion of the epic is a value greater than 0.

The color of the progress status indicator is determined using the following conditions:

- Green: Estimated completion date is on or before the planned end date.
- Yellow: Estimated completion date is beyond the planned end date by a deviation of 1% to 14%.
- Red: Estimated completion date is beyond the planned end date by a deviation of 15% or more.

Related topics

SAFe Feature Dashboard

SAFe Epic Dashboard

Test Management applications

The ServiceNow® Test Management application streamlines the management of testing processes to help you deliver software products more efficiently and with fewer errors.

Test Management is available in two versions.

- Test Management 2.0 offers many enhancements, including integration with Agile Development 2.0 and Scaled Agile Framework (SAFe)
- Test Management 1.0 may have specific capabilities that are useful for your organization.

Use the following comparison to make an informed decision for your organization.

Differences between Test Management 1.0 and Test Management 2.0

Test Management 1.0 covers user acceptance testing. It does not include some key data model structures like test versions, test runs, or test results. In addition, you cannot structure test plans in Test Management 1.0.

Test Management 2.0 includes data model structures that match industry standards. It provides you with an intuitive user interface called the Test Board from which you can structure test plans and plan the phases of your testing effort.

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Tip:

If you need Agile Development integration, test versioning, or detailed test run traceability, use Test Management 2.0. If your organization requires only basic user acceptance testing without Agile integration, Test Management 1.0 may be sufficient.

Feature	Test Management 1.0	Test Management 2.0
Integration with Project Portfolio Management	no	yes
Integration with Agile Development 2.0	no	yes
Integration with Scaled Agile Framework (SAFe)	no	yes
Test version	You cannot create and maintain multiple versions of a test.	You can create and maintain multiple versions of a test.
Test relation	You can associate a test to one test suite only.	You can associate a test to multiple test sets, test plans, and test cycles.
Time duration	You can create a test plan describing how a product or a feature is to be tested.	• You can create a test plan describing how a product or a feature is to be tested and the time frame in which the test plan must be run. • You can further decompose a test plan into test cycles, test cycles into test execution sets, and specify a time range for their execution.
Traceability of test runs and test results	You can: • run a single test at a time. • view the test result.	You can: • run a single test at a time. • view which version of test has been run. • view the test result.

Note:

- If you are an existing Test Management user on a release prior to London, you are using Test Management 1.0 activated through the Test Management (com.snc.test_mgmt) plugin. See the Test Management 1.0 documentation for more information.
- If you are a new user, you can activate the Test Management 2.0 (com.snc.test_management.2.0) plugin as it provides enhanced testing capabilities. See the Test Management 2.0documentation for more information.

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Domain separation and Test Management

Domain separation is supported in Test Management. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

Related topics

Domain separation for service providers

Test Management 1.0

The ServiceNow® Test Management 1.0 application provides a tool for manual software testing.

With the Test Management plugin (com.snc.test_mgmt), test managers and testers can perform the following functions and manage all phases of the testing process.

- Create and maintain the test repository by creating test suites, test cases, and tests. For more information, see Create a test suite.
- Enable test execution by creating test plans, adding test cases, and assigning testers to test cases. For more information, see Create a test plan.
- Initiate the testing process and monitor the progress.
- Perform tests and record test results. For more information, see Performing tests and updating the test status.
- Update test case status. For more information, see Update the status of a test case.
- Report defects and retest, as necessary. For more information, see Report a defect from a failed test.
- Evaluate test results and complete the test plan sign-off form. For more information, see Complete the test plan sign-off.
- View testing reports on the Test Management dashboard. For more information, see Test Management dashboard.

Activate Test Management

To activate the Test Management (com.snc.test_mgmt) plugin you must have an admin role.

Before you begin
Role required: admin

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About this task

Note:

There are two ways to activate the Test Management plugin:

- As an individual application
- As part of the Project Portfolio Suite with Financials plugin.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

   Note:
   When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Components installed with Test Management

Several types of components are installed with activation of the Test Management plugin, including tables and user roles.

Note:
The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Roles installed

Role title [name]	Description	Contains roles
Test manager [tm_test_manager]	Manages test plans and test suites (metadata). Has all privileges within test management, including planning, execution, and administration.	tm_tester
Tester [tm_tester]	Executes test cases and tests.	feature_user

Tables installed

Table	Description
Test Case	Stores the test cases.

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Table	Description
[tm_test_case]	
Test Case Instance [tm_test_case_instance]	Extends the Planned Task table.
Test Suite [tm_test_suite]	Stores the test suites.
Test Environment [tm_test_environment]	Stores the test environments.
Test [tm_test]	Stores the tests.
Test Instance [tm_test_instance]	Stores the tests under a test plan.
Test Plan [tm_test_plan]	Stores the test plans. Extends the Planned Task table.
Test Case Defects [m2m_tm_test_case_instance_defect]	Stores the test case defects that are recorded for failed tests.

Business stakeholder role for Test Management 1.0

Use the business stakeholder role to read and retrieve data from any table of the Test Management 1.0 application to generate reports.

When you activate the Business Stakeholder plugin (com.snc.business_stakeholder) in your ServiceNow instance, the Read only roles for Test Management 1.0 plugin (com.snc.tm1_read_roles) is also activated. This plugin provides a business stakeholder role (sn_tm1_read) with which you can access all the tables of the Test Management 1.0 application. This role also allows read-only access to the Test Management dashboard. You can assign this role to any user in your organization who is a business stakeholder.

Plugin availability

If you are a new customer, the Read only roles for Test Management 1.0 plugin (com.snc.tm1_read_roles) is activated on zBoot. However, the business stakeholder role (sn_tm1_read) is available only when you activate the Test Management 1.0 plugin (com.snc.test_mgmt).

If you are an upgrade customer, you must manually activate the Read only roles for Test Management 1.0 plugin (com.snc.tm1_read_roles).

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Test Management 1.0 tables accessible by users with the business stakeholder role

When both the Read only roles for Test Management 1.0 plugin (com.snc.tm1_read_roles) and Test Management 1.0 plugin (com.snc.test_mgmt) are active in your ServiceNow instance, the user with the business stakeholder role (sn_tm1_read) has read access to the following tables.

Test Management 1.0 tables

Table	Description
Test Case [tm_test_case]	Stores the test cases.
Test Case Instance [tm_test_case_instance]	Extends the Planned Task table.
Test Suite [tm_test_suite]	Stores the test suites.
Test Environment [tm_test_environment]	Stores the test environments.
Test [tm_test]	Stores the tests.
Test Instance [tm_test_instance]	Stores the tests under a test plan.
Test Plan [tm_test_plan]	Stores the test plans. Extends the Planned Task table.
Test Case Defects [m2m_tm_test_case_instance_defect]	Stores the test case defects that are recorded for failed tests.

Test Management key terms

Key terms describe the terminology used in Test Management.

Key terminology

Term	Definition
Test suite	A repository of test cases. Test cases in a test suite can be copied over to a test plan.
Test case	A collection of related tests. A test case is saved as part of a test suite and can be added to a test plan. Each test case within a test plan has an assigned tester.

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Key terminology (continued)

Term	Definition
Test	A collection of conditions or steps used to determine whether a feature is working correctly. A test also includes an expected result, which is used to determine if the test case passes or fails.
Test plan	The tasks for how a product or a feature is to be tested. A test plan includes one or more test cases and can also specify a test environment. The test manager uses the test plan to assign and execute test cases and to track the testing progress.
Test environment	The instance where testing should be performed, specified as a URL. A test environment is an optional parameter that the test manager can associate with a test plan.
Test execution	The process of performing tests. The test manager assigns testers to test cases in a test plan; testers perform the tests in the assigned test cases.
Guided test execution	An automated notification process for performing tests. The test manager assigns testers to test cases in a test plan and initiates testing from the Test Plan form. Testers receive notification to begin testing using the Assessments engine.

Test Management process flow

The tasks associated with manual software testing can be divided into several steps.

The test manager and the tester are involved in the following activities in a manual testing process for a product or feature:

- Build the test repository by creating test suites, test cases, and tests.
- Create a test plan to test a specific product or feature
- Adds test cases to the test plan.
- Assign a tester to each test case.
- If required, define a test environment.
- Perform tests for the assigned test cases.
- Record the results and update the status of each test.
- Update the status of test cases.
- Monitor the progress of the test plans, test cases, and tests.

Stakeholders review the test results and any open issues to decide on the sign-off of the test plan.

Except for completing the test plan sign-off form at the end, there is no required order for performing these testing tasks. Each task can be independently performed.

Setting up the manual testing process

Set up and monitor the test suites, test cases, and test plans.

With Test Management 1.0, you can perform the following tasks:

- Create and maintain the test repository, including test suites, test cases, and tests.
- Create test plans.
- Define test environments, if desired.

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- Add test cases to a test plan.
- Assign a tester to each test case.
- Notify testers to begin testing.
- Monitor the testing process.
- Evaluate test results.
- Complete the test sign-off form.

Test suites

Use test suites to group test cases together so that you can execute your tests efficiently.

Navigate to **Test Management** > **Test Repository** > **Test Suites** to display a list of test suites. Click a test suite to display the Test Suite form, which lists all test cases included in the suite.

Create a test suite

A test suite is made up of one or more test cases that are grouped for execution purposes.

Before you begin

Role required: tm_test_manager or tm_tester

Procedure

1. Navigate to **All** > **Test Management** > **Test Repository** > **Test Suites**.
2. Click **New**.
3. On the form, fill in the fields.

Test Suite form

Field	Description
Number	System-generated unique identifier of the test suite.
Name	Name of the test suite.
Active	Option to indicate if the test suite is active. If indicated as active, this test suite is visible to users when they try to add a test case to this suite from the Test Case form.
Owner	Owner of the test suite.
Description	Detailed description of the test suite.

4. Click **Submit**.

What to do next

You can use the related links and related lists of the new test suite for the following actions:

- Add this test case to a test plan by clicking the **Add to Test Plan** related link.
- Create a copy of this test suite by clicking the **Create duplicate** related link. For more information, see Create a copy of an existing test suite.
- Associate test cases to this test suite by using the Test Cases related list. For more information, see Add a test case to a test suite.

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Create a copy of an existing test suite

Create a test suite with the details of an existing test suite.

Before you begin

- Create a test suite.
- Role required: tm_test_manager or tm_tester

Procedure

1. Navigate to **All** > **Test Management** > **Test Repository** > **Test Suites**.
2. Open the test suite that you want to create a copy of.
3. In the related links section at the bottom of the test suite form, click **Create duplicate**.

> **Tip:**
>
> If the **Create duplicate** related link is not visible, verify that you have the tm_test_manager or tm_tester role and that the test suite is active.

4. Enter a name in the **Test Suite Name** field.
5. Click **OK**.

What to do next

You can use the related links and related lists of the new test suite for the following actions:

- Add this test suite, with all associated test cases, to a test plan by clicking the **Add to Test Plan** related link.
- use the Test Cases related list to associate test cases to this test suite.

Add a test case to a test suite

Create and add a new test case to an existing test suite.

Before you begin

- Create a test suite.
- Role required: tm_test_manager or tm_tester

Procedure

1. Navigate to **All** > **Test Management** > **Test Repository** > **Test Suites**.
2. Open the test suite to which you want to add a test case.
3. From the Test Cases related list, click **New**.
4. On the form, fill in the fields.

Test Case form

Field	Description
Number	System-generated unique identifier of the test case.
Active	Option to indicate if the test case is active.
Test Suite	Test suite which the test case is added to.
Short Description	Detailed description of the test case.

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Field	Description
Prerequisites	Any conditions that must be met before the test case is executed.

5. Click **Submit**.

Test cases

Use test cases to group related tests together so that you can add them to a test suite or a test plan.

A test case contains one or more related individual tests and defines the conditions under which a feature must be verified. Test cases are the primary unit for organizing and executing tests in Test Management.

Navigate to **Test Management** > **Test Repository** > **Test Cases** to view a list of test cases. Select a test case to display the Test Case form, which lists all tests in the test case.

Test organization hierarchy

Tests in Test Management are organized in the following hierarchy:

1. Tests: Individual test steps that verify a specific condition.
2. Test cases: Groups of related tests.
3. Test suites: Collections of related test cases.
4. Test plans: Structured plans that contain test suites and define how a product must be tested.

For more information, see Create a test case.

Create a test case

Create a test case to group one or more related individual tests.

Before you begin

Role required: tm_test_manager or tm_tester

Procedure

1. Navigate to **All** > **Test Management** > **Test Repository** > **Test Cases**.
2. Click **New**.
3. On the form, fill in the fields.

Test Case form

Field	Description
Number	System-generated unique identifier of the test case.
Active	Option to indicate if the test case is active.
Test suite	Test suite that the test case belongs to.
Short description	Brief summary of the test case. Use a consistent naming convention such as **[Feature]: [Scenario]** to make test cases easy to identify in lists and reports.

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Field	Description
Prerequisites	Conditions that must be met before the test case is executed, such as required roles or data setup.

4. Click **Submit**.

What to do next

You can use the related link and related list of the new test case for the following actions:

- Add this test case to a test plan by clicking the **Add to Test Plan** related link.
- Add tests to this test case by using the Tests related list. For more information, see Add a test to a test case.

Add a test to a test case

Create and add a new test to an existing test case.

Before you begin

- Create a test case.
- Role required: tm_test_manager or tm_tester

Procedure

1. Navigate to **All** > **Test Management** > **Test Repository** > **Test Cases**.
2. Open test case which you want to add the test to.
3. From the Tests related list, click **New**.
4. On the form, fill in the fields.

Test form

Field	Description
Number	System-generated unique identifier of the test
State	State of the test. Select from one of the following: ○ **Draft**: Test is not ready to be performed. ○ **Ready**: Test is ready to be performed. ○ **Inactive**: Test is no longer active.
Order	Order in which the test is performed, relative to other tests in this test case.
Test	Name of the test.
Expected result	Expected result of the test.
Detailed description	Detailed description of what is being tested.

5. Click **Submit**.

What to do next

You can create a copy of this test by using the **Create Duplicate** related link on the test form.

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Delete a test case

Delete a test case and all the tests associated to it.

Before you begin
Role required: tm_test_manager

Procedure

1. Navigate to **All** > **Test Management** > **Test Repository** > **Test Cases**.
2. Open the test case that you want to delete.
3. Click **Delete**.
4. **Optional:** Read the warning message in the confirmation pop-up window.
5. Click **Delete** to confirm the deletion.

Result
The test case is removed from the list and all the associated tests are deleted.

Tests

Use tests to determine if a feature or an application is working correctly.

A test is made up of conditions, variables, or steps that are used to determine whether a feature is working correctly. A test also includes an expected result, which is used to determine whether the test passes or fails.

Related tests are grouped together in a test case. From the Tests related list on a Test Case form, you can view a list of all tests associated with the test case. Navigate to **Test Management** > **Test Repository** > **Test Cases** and select a test case to view the list of its tests.

Create a test

Create a test to see if your features are working correctly.

Before you begin

- Create a test case.
- Role required: tm_test_manager or tm_tester

Procedure

1. Navigate to **All** > **Test Management** > **Test Repository** > **Test Cases**.
2. Open a test case to which you want to add a test.
3. From the Tests related list, click **New**.
4. On the form, fill in the fields.

Test form

Field	Description
Number	System-generated unique identifier for this test.
State	Status of the test. Choose from one of the following:

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Field	Description
	○ **Draft**: Test is not ready to be performed. ○ **Ready**: Test is ready to be performed. ○ **Inactive**: Test is no longer active
Order	Order in which this test is performed, relative to other tests in this test case.
Test	Name of the test indicating what the test is for. For example, **Approve Quote and convert to Order**.
Expected result	Expected result of the test.
Detailed description	Description of what is being tested.

5. Click **Submit**.

What to do next

You can create a copy of this test by clicking the **Create Duplicate** related link. For more information, see Create a copy of an existing test.

Create a copy of an existing test

Create a test with the details of an existing test.

Before you begin

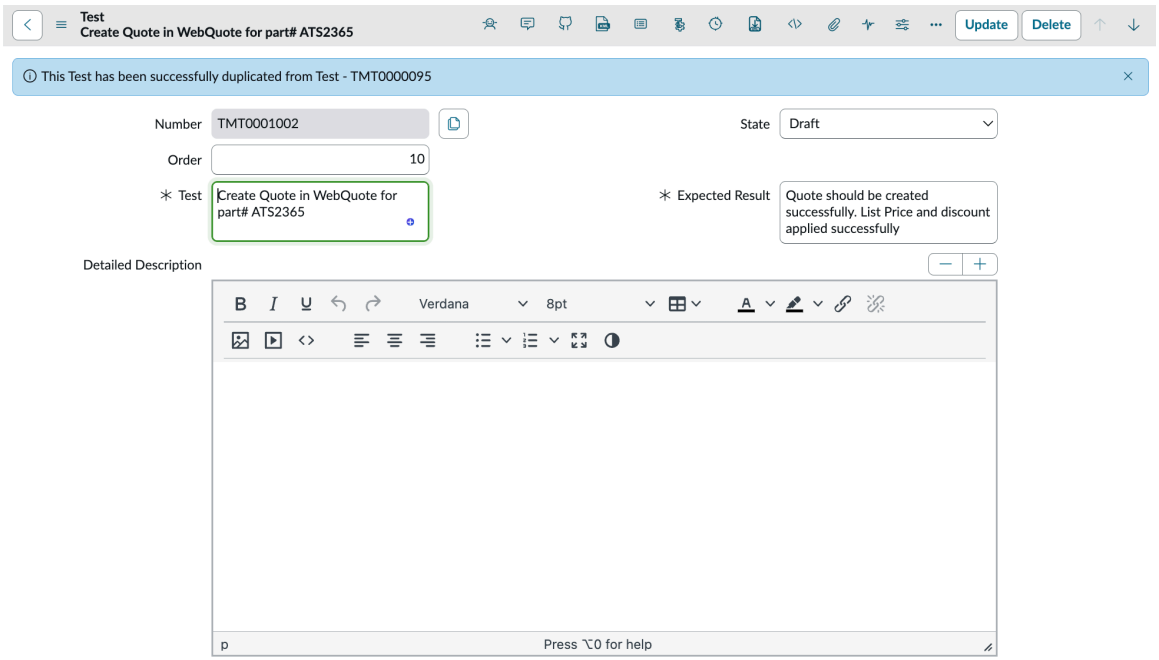
- Create a test.
- Role required: tm_test_manager or tm_tester

Procedure

1. Navigate to **All** > **Test Management** > **Test Repository** > **Test Cases**.
2. Open the test case which has the test that you want to duplicate.
3. From the **Tests** related list, open the test that you want to duplicate.
4. Click the **Create Duplicate** related link.

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A new test is created with details from the old test and the test form is



opened.

5. **Optional:** Make any necessary changes to details of the new test.
6. Click **Update**.

Create a test environment

Create a test environment to define the setup to be used when conducting the tests in a test plan.

Before you begin

Role required: tm_test_manager

About this task

A test plan can specify the software version or the operating system to be used. The Test Environment form includes the type of environment and can also include a URL.

Procedure

1. Navigate to **All** > **Test Management** > **Test Execution** > **Test Environments**.
2. Click **New**.
3. On the form, fill in the fields.

Test Environment form

Field	Description
Number	System-generated unique identifier of the test environment.
Name	Name of the test environment.
Type	Type of environment. Select one from the following: ○ Development ○ Production ○ QA

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Field	Description
	○ User Acceptance Testing (UAT) ○ Staging ○ Support
URL	URL of the test environment.
Short description	Brief description of the test environment.

4. Click **Submit**.

Test plans

Use test plans in Test Management 1.0 to plan how to test your feature or application.

A test plan includes one or more test cases and can also specify a test environment. Test plans are used to assign test cases to testers and to monitor the progress of the tests.

You can view the list of test plans by navigating to **Test Management** > **Test Execution** > **Test Plans**. This list shows the current test plans, along with the percentage of the test cases completed and the status of the test cases. Open a test plan to view more details such as the test environment that is used for this plan and a list of test cases added to this plan.

Create a test plan

Create a test plan to detail how a product or a feature is to be tested.

Before you begin

Role required: tm_test_manager or tm_tester

Procedure

1. Navigate to **All** > **Test Management** > **Test Execution** > **Test Plans**.
2. Click **New**.
3. On the form, fill in the fields.

Test Plan form

Field	Description
Short Description	Brief description of the test plan indicating what the test plan is for.
Owner	Owner of the test plan.
Test environment	Specific environment to be used for testing. Users can see the details of the assigned test environment by clicking to the information icon ( ) next to the Test environment field.
Active	Option to indicate if the test plan is active. If indicated as active, this test plan is visible to users when they try to add a test suite to this plan from the Test Suite form.
Instructions	Any specific instructions for this test plan.
Project	The name of the associated project.

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Field	Description
	This field appears on the Test Plan form if the Test Management PPM Integration is activated as part of the Project Portfolio Suite plugin (com.snc.project_portfolio_suite).
Project Phase	The name of the associated project phase in the Project Workbench. This field appears on the Test Plan form if the Test Management PPM Integration is activated as part of Project Portfolio Suite plugin (com.snc.project_portfolio_suite).
Planned start date	Projected start date for the test plan. The planned start date can be the current date or a future date. This field is automatically set to the current date. To change the planned start date, click the calendar icon () and select a new date. You may need to configure the form to add this field. For more information, see Display test plan execution start and end dates.
Planned end date	Projected end date for the test plan. The planned end date must be after the planned start date. This field is automatically set to the current date. To change the planned end date, click the calendar icon () and select a new date. You may need to configure the form to add this field. For more information, see Display test plan execution start and end dates.
Actual start date	Actual start date for the test plan. The actual start date can be on or before the planned start date. You may need to configure the form to add this field. For more information, see Display test plan execution start and end dates.
Actual end date	Actual end date for the test plan. The actual end date can be before the planned start date but not before the actual start date. You may need to configure the form to add this field. For more information, see Display test plan execution start and end dates.

4. Save the test plan by using one of the following choices.
   - Click **Submit** to return to the Test Plans list.
   - Click **Save** to remain on the Test Plan form.

What to do next

You can use the related links and related lists of the new test suite for the following actions:

- Add existing test cases to this test plan from a test suite by clicking the **Add Test Cases from Test Suite** related link.
- Add new test cases to this test plan from the Test Cases related list. For more information, see Add a new test case to a test plan.

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- Save this test plan as a new test suite by clicking the **Save as Test Suite** related link. A new test suite is created with all the test cases of this plan making them available to add to another test plan.
- Start the test plan and notify the testers about the target end date for testing by using the **Notify Tester** related link. For more information, see Initiate guided test execution.
- Cancel the test execution by clicking **Cancel test execution** related link. This link is available only if you've used the **Notify Tester** related link and started the test plan. For more information, see Cancel guided test execution.
- View all the test cases in a Visual Task Board (VTB) by clicking **Show Visual task Board** related link. The VTB shows test cases in lanes organized by their execution states.
- Create a copy of this test plan by clicking **Copy Test Plan**.
- View the test execution summary and sign off the test plan by clicking the **Sign-off Test Plan** related link.
- View the Test Plan Defects related list for the list of all the defects logged from the test cases.

Display test plan execution start and end dates

Add the planned and actual start and end date fields on the Test Plan form to see the execution date information.

Before you begin

Role required: tm_test_manager or tm_tester

About this task

Configure the Test Plan form layout to display the planned and actual start and end dates for the test plan.

Procedure

1. Navigate to **All** > **Test Management** > **Test Execution** > **Test Plans**.
2. Open a test plan for which you want to see the execution start and end dates.
3. Open the form layout configuration.
   a. Right-click the form header.
   b. Select **Configure**.
   c. Select **Form Layout**.
4. Move the following fields from the Available list to the Selected list.
   - Planned start date
   - Planned end date
   - Actual start date
   - Actual end date
5. **Optional:** Rearrange the order of the fields in the Selected list.
6. Click **Save**.

Result

The Test Plan form is displayed with the newly added date fields.

Add a new test case to a test plan

Add new test cases to your test plans so that you can assign them to testers and start test execution.

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Before you begin
Role required: tm_test_manager or tm_tester

About this task
You can add test cases that are not already a part of existing test suites. Create a test case directly from the Test Plan form through the Test Cases related list.

Procedure
1. Navigate to **All** > **Test Management** > **Test Execution** > **Test Plans**.
2. Open the test plan which you want to add the test cases to.
3. In the **Test Cases** related list, click **New**.
4. On the form, fill in the fields.
   For information on the Test Case form fields, see Create a test case.
5. Click **Submit**.

Result
The new test case is added to the **Test Cases** related list.

Assigning testers to test cases

Assign the test cases in a test plan to users with the tester (tm_tester) role and to business users.

Test cases can be assigned to users from the Test Plan form directly, or from the Visual Task Board (VTB) view of the test cases in the test plan.

Users with the tm_tester role can choose to perform testing from the Test Plan form or the Test Case form, the VTB, or by using the guided test execution feature. Business users can only perform testing using the guided test execution.

Assign testers from the Test Plan form

Use the Test Cases related list on the Test Plan form to assign testers.

Before you begin
Role required: tm_test_manager or tm_tester

Procedure
1. Navigate to **All** > **Test Management** > **Test Execution** > **Test Plans**.
2. Open a test plan.
3. From the **Test Cases** related list, open a test case to which you want to assign a tester.
4. Select a user in the **Assigned to** field.
5. Click **Update**.

Assign testers from the Visual Task Board

Assign the test case to a tester from the Visual Task Board (VTB).

Before you begin
Role required: tm_test_manager or tm_tester

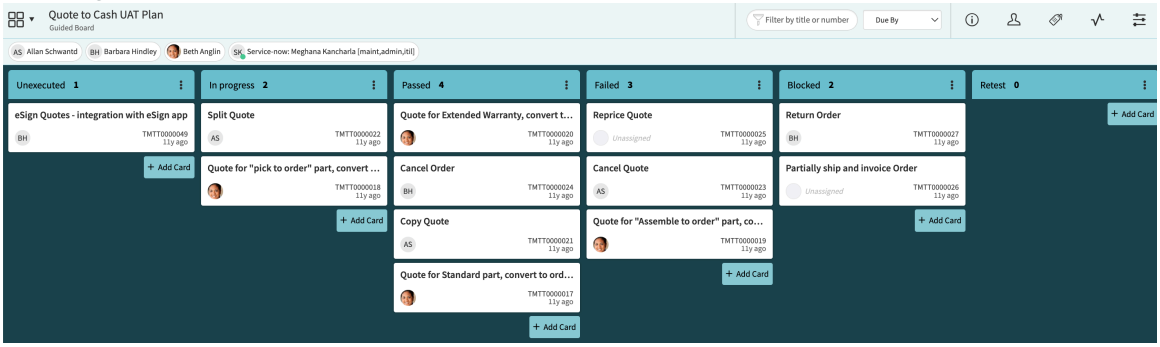
Procedure
1. Navigate to **All** > **Test Management** > **Test Execution** > **Test Plans**.
2. Open a test plan.

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3. Click the **Show View Task Board** related link.

   The VTB displays lanes for test case statuses. A card for each test case appears in the appropriate lane based on its status. Test cases that are not assigned to any user display Unassigned on their cards.

Unassigned test case card on the Test Plan Visual task Board



4. Click the Unassigned card to open the test case form.
5. Click **ASSIGNED TO** from the right side panel.
6. Click **Add Primary Assignee** and select a user.
7. Close the card by clicking the close icon (✕).

Guided test execution

Notify testers about the test cases that are assigned to them through guided test execution by using the Assessments application to notify testers about assigned test cases.

Any user can perform tests using the guided testing feature. The tester (tm_tester) role is not required. An assessment metric category is created for each tester in a test plan.

The test manager assigns testers to test cases from the Test Plan form and initiates the testing by assigning an end date for the testing. Testers can navigate to **Self-Service** > **My Tests** or **Self-Service** > **My Assessments** to view and work on the test cases assigned to them. For more information, see Initiate guided test execution.

Any changes to the test plan, test case, or tests are automatically updated in the assessment. As the tester progresses through the assessment, the test plan and test case are updated when the tester submits results.

The test manager can cancel the guided test execution at any time directly from the Test Plan form. For more information, see Cancel guided test execution.

Initiate guided test execution

Create assessments for the assigned testers of each test case in a test plan by notifying them to start testing. The test manager can initiate guided test execution from the Test Plan form.

Before you begin

- Create a test plan.
- Add test cases to the test plan.
- Assign testers from the Test Plan form.
- Role required: tm_test_manager or tm_tester

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About this task

If you are using guided test execution, you can notify testers to start testing directly from the Test Plan form. The testers are notified through an email about their assigned assessments. Testers can find these assessments by navigating to **Self-Service** > **My Tests** or **Self-Service** > **My Assessments**.

Procedure

1. Navigate to **Test Management** > **Test Execution** > **Test Plans**.
2. Open the test plan that you want to start executing.
3. From the Test Cases related list, use the **Assigned to** field to assign the test cases to testers.
4. Click the **Notify Tester** related link.
5. Enter a date in the **Testing end date** field and click **OK**.
   This date is used as the due date for the assessment.

Result

Assessments for each tester are created and email is sent to each tester with the assessment and testing details. After the testers are notified through the email, the **Notify Tester** related link on the Test Plan form changes to **Cancel test execution**.

Cancel guided test execution

Cancel the guided testing process after it has started so that you can restart it when appropriate.

Before you begin

- Create a test plan.
- Add test cases to the test plan.
- Assign testers from the Test Plan form.
- Initiate guided test execution
- Role required: tm_test_manager or tm_tester

About this task

Use the related link on the Test Plan form to cancel a test execution that has already started.

Procedure

1. Navigate to **All** > **Test Management** > **Test Execution** > **Test Plans**.
2. Open the test plan that you want to stop the testing for.
3. Click the **Cancel test execution** related link.
4. Click **OK**.

Result

A message indicates that the test plan execution has been canceled and the metric type that has been created for the test plan is deleted.

The **Cancel test execution** related link on the Test Plan page changes to **Notify Tester**.

Performing tests and updating the test status

Perform tests, record test results, and update the test status after test cases are assigned.

Testers can perform the following actions in the Test Management application:

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- Perform the tests in a test case and record the results.
- Update the test status.
- Report a defect if a test fails.
- Report a blocking issue if a test is blocked.
- Retest as necessary.
- Update the test case status.

If a guided test execution feature is used, any user can be assigned to a test case and can perform the tests within that test case.

Perform tests using the Test Case form

Perform tests from an assigned test case and record results using the Test Case form.

Before you begin

Role required: tm_tester

Procedure

1. Navigate to **All** > **Test Management** > **Test Execution** > **Test Plans**.
2. Click the assigned test case in the **Test Cases** related list.
3. Set the **Execution Status** field on the Test Case form to **In progress** and click **Save**.
4. In the Tests related list, open the first test.
   The test order is determined by the number in the **Order** field.
5. Set the **Status** field for the test to **In progress**.
6. Right-click the form header and click **Save**.
7. Perform the steps outlined in the **Detailed description** field.
8. Record the result in the **Actual result** field.
9. Compare the actual result to the expected result and update the test status in the **Status** field to one of the following:
   - Passed
   - Failed
   - Blocked
10. Click **Update**.
11. Repeat steps 4-10 for the remaining tests in the test case.
12. After all of the tests are complete, update the test case status.
    For more information, see Update the status of a test case.

Perform tests using the Visual Task Board

Perform tests from an assigned test case and record results using a bulletin board-type graphical interface.

Before you begin

Role required: tm_tester

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Procedure

1. Navigate to **All** > **Test Management** > **Test Execution** > **Test Plans**.
2. Click the **Show Visual Task Board** related link.
3. Open the assigned test case by clicking the test case number on the card.
4. Set the **Execution Status** field on the Test Case form to **In progress** and click **Save**.
5. In the Tests related list, open the first test.
   The number in the **Order** field determines the test order.
6. Set the **Status** field for the test to **In progress**.
7. Right-click the form header and click **Save**.
8. Perform the steps outlined in the **Detailed description** field.
9. Record the result in the **Actual result** field.
10. Compare the actual result to the expected result and update the test status in the **Status** field to one of the following values:
    - Passed
    - Failed
    - Blocked
11. Click **Update**.
12. Repeat steps 5–11 for the remaining tests in the test case.
13. After all tests are complete, update the test case status.
    For more information, see Update the status of a test case.

Perform tests using guided test execution

Perform tests from an assigned test case and record results.

Before you begin

Role required: none

About this task

When the guided testing is initiated, the testers assigned to the test cases in the test plan are notified by email and can begin testing.

Procedure

1. Navigate to the assigned test case using one of the following ways.
   - **Self-Service** > **My Tests**
   - **Self-Service** > **My Assessments**
   A card with the test plan name and assignment information appear.
2. Click the **Start Testing** button to display a list of assigned test cases and the tests included in each case.
3. Perform each of the tests in the test case by following the individual test steps.
4. Record one of the following results for each of the tests performed.
   - Passed
   - Failed
   - Blocked
5. At the bottom of the list, choose an overall result from the following for the test case.

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- Passed
- Failed
- Blocked

6. Click **Save**.

Update the status of a test case

Manually update the status of a test case. The status of the individual tests in a test case does not affect the overall status of the test case.

Before you begin

Role required: tm_test_manager or tm_tester

Procedure

1. Navigate to **All** > **Test Management** > **Test Repository** > **Test Plans**.
2. Open the test plan that contains your test case.
3. From the **Test Cases** related list, click your test case.
4. In the **Execution Status** field, select a status.
   - **Unexecuted**: Test is not executed yet.
   - **In Progress**: Testing is in progress for this test case.
   - **Passed**: All tests assigned to this test case have a status of **Passed**.
   - **Failed**: One or more of the tests assigned to this test case have a status of **Failed**.
   - **Blocked**: One or more of the tests assigned to this test case have a status of **Blocked**.
   - **Retest**: Test is ready to be run again as a defect resulting from a failed test has been set to Closed Complete.
5. If you select **Blocked** as the status, enter a reason for this test being blocked in the **Blocked Reason** field.
6. Save the update by using one of the following choices.
   - Click **Submit** to save and return to the Test Cases list.
   - Click **Save** to save and remain on the Test Case form.

   The test results are updated in the test plan.

What to do next

If a test case has failed, you can create a defect for this test case from the failed test by clicking the **Report Defect** related link. For more information, see Report a defect from a failed test.

You can link an existing defect to the test case by clicking the **Assign Defect** related link. For more information, see Assign a defect to a test case.

The reported and assigned defects are listed in the Defects for Test Case related list.

Report a defect from a failed test

Report a defect from an individual test that has failed so that you can further investigate the test failure.

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Before you begin

- Activate Agile Development 2.0

  The ability to report a defect is available only if the Agile Development 2.0 plugin is activated.

- Perform tests and update the test status. For more information, see Performing tests and updating the test status.
- Role required: tm_tester

> **Important:**
>
> Verify that the rm_tester role is assigned to you in your instance. This role is required to use the Report Defect link. If the role is not available, contact your system administrator to confirm the correct role for your organization.

About this task

Use the Test form to report a defect for a test that has failed. The reported defect is also linked to the test case which this test is related to.

Procedure

1. Navigate to **All** > **Test Management** > **Test Execution** > **Test Plans**.
2. Open the test plan which has the failed test.
3. From the Test Cases related list, open the test case which has the failed test.
4. From the Tests related list, open the test that failed.
5. On the Test form, click one of the following links:
   - The **Report Defect** link next to the **Status** field.
   - The **Report defect** related link.
6. On the form, fill in the fields.

Report Defect form

Field	Description
Number	System-generated unique identifier for the defect.
Assignment group	Group assigned to fix this defect.
Assigned to	Individual assigned to fix this defect.
Priority	Priority of the defect. Choose one from the following: ○ 1- Critical ○ 2 - High ○ 3 - Moderate ○ 4 - Low ○ 5 - Planning
State	The current state of the defect. Select one from the following: ○ Draft ○ Scoping ○ Awaiting Approval

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Field	Description
	○ Work in Progress ○ Testing/QA ○ Deploy/Launch ○ Closed/Complete ○ On hold ○ Canceled
Short description	Brief explanation of the defect.
Description	Detailed explanation of the defect.
Work notes	Any comments, notes, or other information related to the defect.

7. Click **Submit**.

Result
A defect is created and added to the following related lists:

- Defects for Test Case related list of the test case associated with the failed test.
- Test Plan Defects related list of the test plan associated with the failed test.

What to do next
After submitting the defect, you can modify it from the defect record. The role required to modify a defect depends on your organization's configuration. By default, the defect is assigned to the group or individual specified in the **Assignment group** and **Assigned to** fields.

Assign a defect to a test case

Assign an existing defect to a test case to track the relationship between defects and test cases.

Before you begin

- Activate Agile Development 2.0

  The ability to assign a defect is available only if the Agile Development 2.0 plugin is activated.

- A defect record must exist in your instance. If no defect exists, create one first. For more information, see Report a defect from a failed test.
- Perform tests and update the test status. For more information, see Performing tests and updating the test status.
- Role required: tm_tester

About this task
When you link a defect to a test case, a reference to the defect is added both to the test case and the test plan of this test case.

Procedure

1. Navigate to **All** > **Test Management** > **Test Execution** > **Test Plans**.
2. Open a test plan which contains your test case.
3. From the Test Cases related list, open the test case to which you want to assign the defect.
4. Click **Assign Defect.**

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5. Select a defect from the **Defect** field..
6. Click **OK**.

Result
The defect that you assigned to the test case is added to the following related lists:

- Defects for Test Case related list of the test case.
- Test Plan Defects related list of the test plan associated with the test case.

You can also configure the Defect form to display the Test Cases related list so that you can see the test case associated with this defect.

Monitoring the progress of testing

Track the testing progress for test plans, test cases, and individual tests using the Test Plans module or the Test Management dashboard.

Test Plans module

To understand the progress of all your test plans, navigate to **Test Management** > **Test Execution** > **Test Plans** and use the following information from the list of test plans:

- Percent complete: Amount of testing that is complete in the test plan.

  This value calculated as (number of cases passed + number of cases failed)/total number of test cases.

- Test cases failed: Number of failed test cases in the test plan
- Test cases passed: Number of passed test cases in the test plan
- Number of test cases: Total number of test cases in the test plan

From here, you can drill down to the details of test cases associated with this test plan and the tests attached to each of the test cases.

From the Test Cases related list on the Test Plan form, you can view the following information for each test case:

- Tests passed
- Tests failed
- Test case execution status

When you open a test case from the Test Cases related list, you can view the following information for each of its tests:

- Expected result
- Actual result
- Test status

Test Management dashboard

Analyze the progress of all your active test plans by using multiple reports on the Test Management dashboard. For more information, see Test Management dashboard.

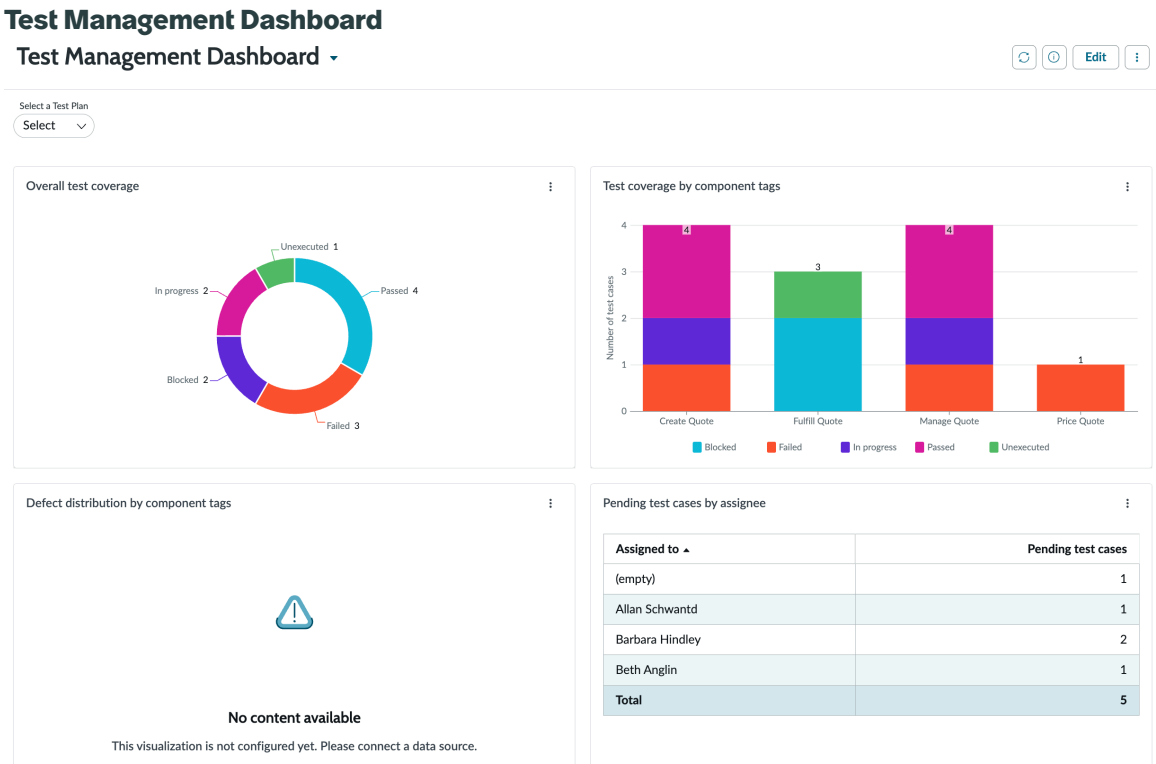
Test Management dashboard

View test plan reports on the Test Management dashboard.

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From each report on the Test Management dashboard, you can select an individual test plan or all active test plans for an overview of all testing.

To access the dashboard, navigate to **Test Management** > **Overview**. Then select a test plan that you want to analyze the progress of, from the **Select a Test Plan** field in the reports. The data in the report updates automatically.



Test Management Dashboard Reports

Report title	Report type	Description
Overall Test Coverage	Pie 	Displays the test case distribution by the execution status: • Passed • Failed • Blocked • In progress • Unexecuted
Test Coverage By Component Tags	Bar 	This report employs the tagging feature, which you can use to assign tags to test cases. Then use this report to display the test case distribution based on the assigned tags. For each tag, the different colors represent the execution status: • Passed • Failed • Blocked

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Test Management Dashboard Reports (continued)

Report title	Report type	Description
		• In progress • Unexecuted
Defect Distribution By Component Tags	Bar 	This report employs the tagging feature, which you can use to assign tags to test cases. Then use this report to display test case defects based on the assigned tags. For each tag, the different colors represent the defect priority: • Critical • High • Moderate • Low
Pending Test Cases By Assignee	List 	Number of test cases pending for each assigned tester.

Test plan sign-off

Record approval of the test plan by using the functionality to sign off a test plan.

Navigate to the test execution sign-off report by navigating to the Test Plan form and clicking the **Sign-off Test Plan** related link. The report provides an overview of the test case results, open test cases, and any open issues as of the current date by using the following information:

- A count of how many test cases passed, failed, are blocked, or are not tested.
- A list of the open test cases. This list displays cases that are blocked, failed, in progress, and not executed.
- A list of open defects and open issues ().
- Sign-off details, including sign-off history.

The test manager can review the details and proceed to sign off the test plan.

Multiple sign-offs can be required for one test plan and a test plan can be signed off even if it has failed test cases. Each sign-off takes a snapshot of the test plan in its current state, saves the snapshot as a PDF, and attaches the file to the test plan. This snapshot captures all test cases, including failed and unexecuted test cases as well as open defects.

Complete the test plan sign-off

Review and sign off the test plan so that you can record the approval of the test plan.

Before you begin
Role required: tm_test_manager

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Procedure

1. Navigate to **Test Management > Test Execution > Test Plans**.
2. Open the test plan that you want to sign off.
3. Click the **Sign-off Test Plan** related link.
4. In the Sign Off section, enter any additional information in the **Comments** field.
5. **Optional:** Review the user in the **Sign-off By** field.
6. **Optional:** Review the date in the **Sign-off Date** field.
7. Click **Submit**.

Test Management 2.0

The ServiceNow® Test Management 2.0 application streamlines the management of testing processes to help you deliver software products more efficiently and with fewer errors. You can create multiple versions of a test and integrate with Agile Development 2.0.

To learn about the different versions of Test Management and to choose the version that helps you meet your testing requirements, see Test Management applications.

Explore	Set up	Use
• Test Management 2.0 overview • Testing using Test Management 2.0 • Sprint testing	• Activate Test Management 2.0 • Quick start tests for Test Management 2.0	Test Board in Test Management 2.0

Develop	Troubleshoot and get help
• Developer training • Developer documentation • Installed with Test Management 2.0	• Ask or answer questions in the Business Management community • Search the Known Error Portal for known error articles • Contact Customer Service and Support

Test Management 2.0 overview

Test Management 2.0 helps you deliver software products more efficiently and with fewer defects by managing and streamlining testing processes for both testers and managers. You can create multiple versions of a test and integrate with Agile Development 2.0.

To learn about the different versions of Test Management and to choose the version that helps you meet your testing requirements, see Test Management applications.

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Important:

Test Management 2.0 is not active by default on all instances. To use Test Management 2.0, activate the `com.snc.test_management.2.0` plugin. For more information, see Activate Test Management 2.0.

User	Description
Tester	Can run tests and track defects for a software product by: • Creating tests and test sets. • Performing tests and recording test results. • Updating status of tests. • Creating defect records manually and linking them to failed tests for retesting. **Important:** To record a defect for a failed test in Test Management 2.0, create a defect record manually and reference the test in the defect description.
Test Manager	Can set up and monitor the manual testing process of a software product by: • Creating and maintaining tests and test sets. • Evaluating the tests, test steps, and test sets created by testers. • Facilitating test execution by creating test plans, fragmenting a test plan into test cycles, and test cycles into test execution suites. • Initiating a testing process by assigning tests to testers and then monitoring overall progress. • Assessing test results and closing a test plan.

Key terminology

The following section describes the key terms used in Test Management 2.0.

Term	Description
Test	A collection of conditions or steps used to determine whether a feature is working correctly. A test can also include an expected result, which is used to determine if the test case passes or fails. You can use the Tests module to create and maintain different versions of a test.
Test set	A collection of related tests. A test can be a part of one or more test sets. You can use the Test Sets module to create a test set and group related tests into that test set.
Test plan	Plan describing how a product or a feature is to be tested and the time frame in which it must be executed. A test plan can be further broken into test cycles, and test cycles into test execution suites. You can use the Test Plans module to create test plans.

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Term	Description
Test cycle	A subdivision of a test plan that represents a phase or iteration of testing, such as a regression cycle or a sprint cycle. A test plan can contain multiple test cycles, and each test cycle can be further divided into test execution suites. Use the Planning tab on the Test Board to create and manage test cycles.
Test case	A collection of related tests. A test case is saved as part of a test suite and can be added to a test plan. Each test case within a test plan has an assigned tester.
Runs	Detailed report of tests results, such as start time and end time of test execution, environment details, result of test execution. You can use the Run module to view the test results.

Getting started with Test Management 2.0

1. Activate the Test Management 2.0 plugin. For more information, see Activate Test Management 2.0.
2. Create your first test. For more information, see Create a test in Test Management 2.0.
3. Create a test set to organize related tests. For more information, see Create a test set in Test Management 2.0.
4. Create a test plan and assign tests to testers. For more information, see Create a test plan using Test Board in Test Management 2.0.
5. Run your assigned tests. For more information, see Run your test assignments in Test Management 2.0.

Activate Test Management 2.0

Activate the Test Management 2.0 plugin (com.snc.test_management.2.0) if you've the admin role.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note:
   When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

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Installed with Test Management 2.0

Several types of components are installed with activation of the Test Management 2.0 plugin (com.snc.sdlc.test_management), including tables, and user roles.

Roles installed

Role	Description	Contains roles
Tester [sn_test_management.tester]	Can create tests, and group similar tests to a test set.	None
Test Manager sn_test_management.test_manager	Can create tests, group similar tests into test sets, manage test plans, and view the run results.	sn_test_management.tester

Tables installed

Table	Description
Task Test [sn_test_management_m2m_task_test]	Associates tests to multiple scrum tasks.
Test Set Test [sn_test_management_m2m_test_set_test]	Associates tests to multiple test sets.
Planned Test Task [sn_test_management_planned_task]	Extends the Planned Task table.
Steps [sn_test_management_step]	Stores details of test steps.
Step Result [sn_test_management_step_result]	Stores details of step results.
Test [sn_test_management_test]	Stores details of tests.
Test Execution Assignment [sn_test_management_test_assignment]	Stores the linking of tests to testers.
Test Cycle [sn_test_management_test_cycle]	Stores details of test cycles.
Test Environment [sn_test_management_test_environment]	Stores details of test environments.

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Table	Description
Test Execution Suite [sn_test_management_test_execution_suite]	Stores details of test execution suites.
Test Plan [sn_test_management_test_plan]	Stores details of test plans.
Test Result [sn_test_management_test_result]	Stores details of test results.
Test Run [sn_test_management_test_run]	Stores details of test runs.
Test Set [sn_test_management_test_set]	Stores details of test sets.
Test Version [sn_test_management_test_version]	Stores details of test versions.

Business stakeholder role for Test Management 2.0

Use the business stakeholder role to read and retrieve data from any table of the Test Management 2.0 applications to generate reports.

When you activate the Business Stakeholder plugin (com.snc.business_stakeholder) in your ServiceNow instance, the Read only roles for Test Management 2.0 plugin (com.snc.tm2_read_roles) is also activated. This plugin provides a business stakeholder role (sn_tm2_read) with which you can access all the tables of Test Management 2.0 application. This role also allows read-only access to the Test Management dashboard. You can assign this role to any user in your organization who is a business stakeholder.

Plugin availability

If you are a new customer, the Read only roles for Test Management 2.0 plugin (com.snc.tm2_read_roles) is activated on zBoot. However, the business stakeholder role (sn_tm2_read) is available only when you activate the Test Management 2.0 plugin (com.snc.test_management.2.0).

If you are an upgrade customer, you must manually activate the Read only roles for Test Management 2.0 plugin (com.snc.tm2_read_roles).

Test Management 2.0 tables accessible by users with the business stakeholder role

When the read-only roles for Test Management 2.0 plugin (com.snc.tm2_read_roles) and Test Management 2.0 plugin (com.snc.test_management.2.0) are active in your ServiceNow instance, the user with the business stakeholder role (sn_tm2_read) has read access to the following tables.

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Test Management 2.0 tables

Table	Description
Task Test [sn_test_management_m2m_task_test]	Associates tests to multiple scrum tasks.
Test Set Test [sn_test_management_m2m_test_set_test]	Associates tests to multiple test sets.
Planned Test Task [sn_test_management_planned_task]	Extends the Planned Task table.
Steps [sn_test_management_step]	Stores details of test steps.
Step Result [sn_test_management_step_result]	Stores details of step results.
Test [sn_test_management_test]	Stores details of tests.
Test Execution Assignment [sn_test_management_test_assignment]	Stores the linking of tests to testers.
Test Cycle [sn_test_management_test_cycle]	Stores details of test cycles.
Test Environment [sn_test_management_test_environment]	Stores details of test environments.
Test Execution Suite [sn_test_management_test_execution_suite]	Stores details of test execution suites.
Test Plan [sn_test_management_test_plan]	Stores details of test plans.
Test Result [sn_test_management_test_result]	Stores details of test results.
Test Run [sn_test_management_test_run]	Stores details of test runs.
Test Set [sn_test_management_test_set]	Stores details of test sets.

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Test Management 2.0 tables (continued)

Table	Description
Test Version [sn_test_management_test_version]	Stores details of test versions.

Quick start tests for Test Management 2.0

Validate that Test Management 2.0 still works after you make any configuration change such as apply an upgrade or develop an application. Copy and customize these quick start tests to pass when using your instance-specific data.

Test Management 2.0 quick start tests require activating the Test Management 2.0 plugin (com.snc.test_management.2.0). and the Test Management 2.0 - ATF Tests plugin (com.snc.test_management.2.0.atf).

Test Management 2.0: Test version test suite

Test	Description	Release version
Create test version should create test	Validate test creation and version.	Madrid
Should be able to mark test version as ready when it contains verification steps	Validate test state when test has verification steps.	Madrid
Should not able to mark test version as ready when it does not contain verification step	Validate test state when test does not have verification steps.	Madrid
Marking a test version as ready should retire other test version in ready state	Validate test state when marking test ready.	Madrid

Test Management 2.0: Test results rollup test suite

Test	Description	Release version
When test run closed, should update execution suite progress	Validate execution state progress.	Madrid
Should not be able to assign a test not in ready state	Validate test assignment.	Madrid
Test progress should roll up for test plan and test cycle	Validate test progress for test plan and test cycle.	Madrid

Related topics

Quick start tests

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Testing using Test Management 2.0

You can use Test Management 2.0 for general testing such as testing a phase in a release, testing a set of features or products before their market launch, or performing release readiness testing on integration and accessibility (for new software).

General testing comprises the following steps:

1. Creating tests. See Create a test in Test Management 2.0
2. Creating test sets, and grouping similar tests into a test set. See Create a test set in Test Management 2.0.
3. Using the Test Board feature to create a test plan. See Create a test plan using Test Board in Test Management 2.0.
4. Structuring the test plan in the Planning tab of the Test Board.
   - Breaking down the test plan into test cycles to plan and schedule the phases of the testing effort. See Add and modify test cycles and test execution suites in Test Management 2.0.
   - Breaking down the test cycles into test execution sets to schedule tests, and assign users to run those tests. See Create a test execution suite in Test Management 2.0.
5. Running tests and viewing the test run results. See Run your test assignments in Test Management 2.0.

Create a test in Test Management 2.0

Create a test specifying conditions or steps to determine whether a feature is working correctly.

Before you begin

Role required: sn_test_management.tester or sn_test_management.test_manager

Procedure

1. Create a test using either of the following options.

2. In the Test version form, fill in the test name and add steps for your test.
3. Select **Submit**.
4. From the list of Tests, open the test that you just created.
5. From the Test versions related list, open the test version that you just created.

Test Version Form

Fields	Description
Test	Unique name of the test.
Owner	Owner who created the test.
Version	Automatically generated versio
State	Current state of the test. ○ **Draft**: Initial state when a tes editable in this state. ○ **Ready**: State when a test is a test is not editable in this sta

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Fields	Description
	state, create a version using button. ○ **Retired**: State when the test **Tip:** To edit a test, open the tes **Draft** state, make your cha
Short description	Brief description about the tes
Add Step	Button used to add step to a te
Change step order ( )	Icon used to change the order and drag a step to the required This icon is displayed next to a
Needs Verification	Check box used to mark a test This icon is displayed after a te If this checkbox is not selected this step passed, failed, or is b
Delete a test step ( )	Icon used to delete a test step.
Run	Button used to run steps, whic test is in the **Ready** state. See Run your test assignments
Update	Button used to update the deta
Ready	Button used to change the stat **Ready**.
Create New Version	Button used to create another
Delete	Button used to delete the test

6. Click **Submit**.

What to do next
To add a test to a test set:

1. Select the test from the Test list.
2. Click **Add to Test Set**.

Create a test set in Test Management 2.0

Group related tests into a test set. Test sets help you find tests by category or tag.

Before you begin
Role required: sn_test_management.tester or sn_test_management.test_manager

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Procedure

1. Navigate to **All** > **Test Management 2.0** > **Test Sets**.
2. Click **New**.
3. Enter a name for the test set and click **Submit**.

What to do next

You must add tests to the test set.

1. Navigate to **Test Management 2.0** > **Tests**.
2. Select the required tests.
3. Click **Add to Test Set**.
4. In the Select Test Set window, search for the required test set and click **Add**.

To reorder the tests in the test set, open the test set record and use the drag-and-drop functionality to move it to the required position.

Tip:

To change the order of steps within an individual test, see Create a test in Test Management 2.0.

Test Board in Test Management 2.0

Test Board gives you a comprehensive view of your test plans and enables you to manage test plans more efficiently.

In Test Board, you can:

- Aggregate all your test plans and view them as cards at a single location. Each card displays key details of your test plan such as the start and end date, percentage of tests that have passed, percentage of tests that have failed, percentage of tests that have been blocked, and number of days left for completion.
- Search for specific test plans by defining filter conditions such as name, duration, or owner.
- Track, manage, and complete your test plans from a single interface, which saves you time and effort.

1. Define how a product or feature must be tested by creating a test plan.
2. Structure your test plan in the Planning tab. Break down your test plan into test cycles to plan and schedule the phases of testing effort. Further break down your test cycles into test execution sets, schedule the tests, and assign users to run those tests.
3. Monitor the progress and completion of your test plans.

Planning tasks

You can structure a test plan in the Test Board **Planning** tab, which provides the following capabilities:

Test plan work item hierarchy

The Test plan work item hierarchy presents a wide variety of test plan information in expandable rows. It provides a quick overview of the test plan, with test cycles and test execution suites nested within the test plan.

In addition, you can:

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- Modify the attributes (such as start and end time) of the test plan, test cycles, and test execution suites rather than opening each form and modifying the field values one by one.
- Add or delete test cycles and test execution suites, adjust their start and end dates, and then assess the overall progress of the test plan.
- Configure the columns displayed in the Test plan work item hierarchy.

Gantt chart

The Gantt chart provides a visual representation of the timeline of the test plan and its child tasks using a blue task bar. The length of the task bar pertaining to the test plan increases and decreases depending on the adjustments you make to the duration of its child tasks. You can also manually increase or decrease the duration by dragging the edge of the task bar to the required location.

Create a test plan using Test Board in Test Management 2.0

Define how to test a product or feature by creating a test plan.

Before you begin

Role required: sn_test_management.test_manager

Procedure

1. Navigate to **All** > **Test Management 2.0** > **Test Board**.
2. Click **Create Test Plan**.
3. In the form, fill in the fields:

Test Plan form

Field	Value
Name	Unique name for the test plan.
Planned start date	Planned date and time for starting the test plan execution.

4. Click **OK**.
   The **Details** tab opens.
5. Provide, review, and edit the test plan details.

Field	Value
Planned end date	Planned date and time for ending the test plan execution.
Duration	Estimated duration of test plan. This is the difference between the planned start date and the planned end date.
Number	Automatically generated unique ID number for the test plan.
Owner	Owner who created the test plan.
State	Current state of the test plan. ○ **Pending**: Test plan is not yet ready to be performed. ○ **Open**: Test plan is ready to be performed. ○ **Work in progress**: Test plan is currently being performed.

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Field	Value
	○ **Closed complete**: Test plan has been closed after completion. ○ **Closed incomplete**: Test plan has been closed without completion. ○ **Closed skipped**: Test has been closed without being performed.
Description	Description of the test plan.

Note:
The Progress section displays the overall status of the test plan indicating the percentage of tests in the test plan that have passed, failed, or been blocked.

Add and modify test cycles and test execution suites in Test Management 2.0

Add and modify test cycles and test execution suites from a single user interface without having to switch between multiple user interfaces and forms.

Before you begin
Role required: sn_test_management.test_manager

About this task
In Test Management 2.0, a test plan is broken into test cycles, and test cycles are broken into test execution suites. A test cycle represents a phase or iteration of testing within a test plan, such as regression testing or smoke testing. A test execution suite is the smallest unit of organization, containing the individual test assignments for testers.

Use the **Planning** tab to manage this hierarchy from a single view. For more information about key terms, see Test Management 2.0 overview.

Procedure
1. Navigate to **All** > **Test Management 2.0** > **Test Board**.
2. Select the test plan.
3. Select the **Planning** tab.
4. Add or modify test plans and test execution suites in the Test plan work item hierarchy.
5. View the summary or adjust the duration of a task in the Gantt chart.

Define a custom column in the Planning tab of Test Board in Test Management 2.0

Define a custom column to display information important to you in the Test plan work item hierarchy section of the Planning tab. For example, define a column to view the percentage of test plan that has been completed.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Test Management 2.0** > **Settings** > **Planning Console**.
2. Click the gear icon ( ) at the top right corner of the page.
3. In the System Settings window:

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a. Select the Developer section.

b. In the **Application** list, select **Test Management** and then close the window.

4. In the **Planning Console Display Columns** related list, click **New**.
5. In the Planning Console Display Column form, provide a label and other details for the column.
6. Click **Submit**.

What to do next

After you create a column, associate the column to the required table.

Create a test execution suite in Test Management 2.0

Create a short test plan when the testing effort is minimal and you do not want to go through the overhead of creating a test plan and a test cycle for a test execution suite.

Before you begin

Role required: sn_test_management.test_manager

Procedure

1. Navigate to **All** > **Test Management 2.0** > **Test Execution Suites**.
2. In the form, fill in the fields:

Test Execution Suite form

Field	Description
Name	Unique name for the test execution suite.
Planned start date	Planned date and time for starting the test execution suite.
Planned end date	Planned date and time for ending the test execution suite.
Planned duration	Estimated duration for the test execution suite. This duration is the difference between the planned start date and the planned end date.
Number	Automatically generated number for the test execution suite.
State	Current state of the test execution suite.
Assignment group	Group working on test execution suite.

Progress section of the Test Execution form

Field	Description
Percent complete	Percentage of test execution suites that have been completed. Value is calculated automatically.
Percent passed	Percentage of test execution suites that have passed. Value is calculated automatically.
Percent failed	Percentage of test execution suites that have failed. Value is calculated automatically.

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Field	Description
Percent blocked	Percentage of test execution suites that were blocked. Value is calculated automatically.

3. Click **Submit**.

What to do next

- To add tests to the test execution suite, click **Add tests**. From the **Tests** list, select the required tests, and click **Add to Execution Suite**.
- To add test sets to the test execution suite, click **Add test sets**. From the **Test Sets** list, select the required test sets, and click **Add to Execution Suite**.
- In the **Test execution assignments** related list, select the test and assign it to a user.

Run your test assignments in Test Management 2.0

Run your test assignments and capture the results.

Before you begin

Before you begin, ensure the following conditions are met:

- Your test manager has set the tests to **Ready** state and assigned them to you.
- At least one execution environment is configured in your instance.

Role required: sn_test_management.tester

Procedure

1. Navigate to **All** > **Test Management 2.0** > **Tests Assigned to me**.
2. Select the required tests and click **Run**.
   Only the tests that are in the Ready state can be run.

   Trouble?

   If no tests appear in the **Tests Assigned to me** list, confirm with your test manager that tests have been assigned to you and set to **Ready** state.

3. In the pop-up, select the execution environment on which the tests must be run.

   An execution environment specifies the hardware or software configuration on which tests run, such as a browser version or operating system. If no environments appear in the list, contact your system administrator to configure one.

4. In the Test Execution pop-up, mark a step as passed, failed, or blocked using the following icons.
   To pause and work on the test at a later point in time, click **Pause**.
5. Click **Done**.

Result

Test results are saved to the Test Result form. The overall status of the test is defined by statuses of the test steps:

- If all the test steps are passed, the status of the test is **Passed**.
- If at least one step of the test is not run, the status of the test is **Not finished**.

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- If at least one step of the test fails, the overall status of the test is **Failed**.This rule takes precedence over the previous rule.
- If at least one step of the test is blocked, the overall status of the test is **Blocked**. This rule takes precedence over the previous two rules.

What to do next

To view the full history of test runs and results across all test plans, navigate to **Test Management 2.0** > **Test Runs**. For more information about monitoring test plan progress, see Test Board in Test Management 2.0.

Sprint testing

You can use Test Management 2.0 with Agile Development 2.0 to test the work of a scrum team sprint-by-sprint.

Sprint testing lets you verify user stories sprint by sprint. The process involves the following steps:

1. Create tests for the stories in the current sprint. For more information, see Create a test in Test Management 2.0.
2. Run the assigned tests and capture results. For more information, see Run your test assignments in Test Management 2.0.
3. Review test results and close stories when all tests pass. For information about monitoring progress, see Test Board in Test Management 2.0.

Test Management 2.0 integration with Agile Development 2.0

With the integration of Test Management 2.0 and Agile Development 2.0, you can perform sprint testing from **Agile Development 2.0** > **Agile Board** > **Sprint Tracking**.

- Find what tests are to be run for the sprint.
- Create tests for the stories in sprints.
- Maintain multiple versions of a test.
- Run a single version of a test at one time.
- View which version of test has been run.
- Review the history of test results.
- Close stories.

When you create a test through the **Sprint Tracking** view, the test is automatically associated with the story displayed in that row. You can verify this link by opening the story record and reviewing the **Tests** related list. To view all tests linked to stories in a sprint, use the Test Board.

Viewing sprint test results

After testers run their assignments, you can review results at two levels:

- In the **Sprint Tracking** view, each story row displays the test status for that story's tests.
- In Test Board, the test plan card displays the percentage of tests that have passed, failed, and been blocked.

When all tests for a story pass, the story is ready to be closed. To close a story from the Sprint Tracking view, select the story and update its state to **Complete**.

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Create a test for a story

Create a test from the Sprint Tracking view to automatically link it to a story and track whether the story meets its acceptance criteria.

Before you begin

- Role required: scrum_user or scrum_admin
- You can create a test from the List view only when Agile Development 2.0 is installed along with Test Management 2.0.
- You must be a member of an agile group.

About this task

Create a test, add steps to the test, and create and maintain different versions of the test. A test is a collection of conditions or steps used to determine whether a story is working correctly. A test can also include an expected result, which determines whether the test passes or fails. When you create a test from the **Sprint Tracking** view, the test is automatically linked to the story displayed in that row. To confirm the link after creation, open the story record and locate the **Tests** related list.

Procedure

1. Navigate to **All** > **Agile Development** > **Agile Board**.
2. Click the **Sprint Tracking** tab, and select the **List** view.
3. From the **Show** list at the top right corner, select **Tests**.
4. Click **Add Test**.
5. **Optional:** To link an existing test to a story instead of creating a new one, open the story record from the sprint list and locate the **Tests** related list to add the pre-existing test. To create a standalone test to link later, see Create a test in Test Management 2.0.
6. In the form, fill in the fields:

Test Version form

Field	Description
Test	Unique name of the test.
Owner	Owner who created the test.
Version	Automatically generated version of the test.
State	Current state of the test. ○ **Draft**: State of the test when it is created. ○ **Ready**: State of the test when it is not editable. When the test has multiple versions, only one test will be in the **Ready** state at any one time ○ **Retired**: State of the test when it is no longer used.
Short description	Brief description about the test.
Add Step	Button used to add step to a test.
Run	Button used to run steps, which is displayed only when the test is in the **Ready** state. See Run your tests from the List view.
Update	Button used to update the details of a test version.

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Field	Description
Ready	Button used to change the state of the test version to ready.
Create New Version	Button used to create another version of the test.
Delete	Button used to delete the test version.
Change step order ()	Icon used to change the order of a test step. Select the icon and drag the step to the required location.
Needs Verification	Check box used to mark a test step for verification.
Delete a test step ()	Icon used to delete a test step.

What to do next

View information in the following related lists:

Related list	Description
Other versions	Displays all the versions of a test.
Test Results	Displays the run results of each test version.
Test Sets	Displays related tests in a test set.

Tests created through this workflow are automatically linked to the story. To confirm the link, open the story record and locate the **Tests** related list, which displays all tests associated with that story.

Run your tests from the List view

View the test scenario, execute all the steps of the test, and review the test result.

Before you begin

Role required: scrum_user

Procedure

1. Navigate to **All** > **Agile Development** > **Agile Board**.
2. Click the **Sprint Tracking** tab and select the **List** view.
3. Click a test.
4. Verify a story by clicking **Run** on the story.
   This step runs all tests of the story at once.
5. In the pop-up, select the environment on which the test is to be run.
   a. Click **Lookup using list** icon.
   b. Click **Run**.
6. In the Test Execution pop-up, mark a step as passed, failed, or blocked using the following icons.

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- To select an icon, you can also use the **Tab** key. Press **Tab** and then press **Enter**.
- To pause and work on the test at a later point in time, click **Pause**.

7. Click **Done**.

Result
Test result is saved to the Test Result form, and the latest test result of each test is displayed in the List view.

The overall status of the test is defined by statuses of the test steps:

- If all the test steps are passed, the status of the test is **Passed**.
- If at least one step of the test is not run, the status of the test is **Not finished**.
- If at least one step of the test fails, the overall status of the test is **Failed**. This rule takes precedence over the previous rule.
- If at least one step of the test is blocked, the overall status of the test is **Blocked**. This rule takes precedence over the previous two rules.

Migration from Test Management 1.0 to Test Management 2.0

Migrate your test data from Test Management 1.0 to Test Management 2.0, and start using Test Management 2.0 for its enhanced testing capabilities and features.

Apply the following migration steps on a non-production instance, verify if the migration is completed as intended, and then perform the migration steps on a production instance.

Migration steps

To migrate your test data from Test Management 1.0 to Test Management 2.0, complete the following steps in order:

1. Activate the required plugins. For more information, see Migration from Test Management 1.0 to Test Management 2.0.
2. Convert your test suites. For more information, see Convert test suites.
3. Verify the migrated data on a non-production instance before repeating on production.

Activate plugins

Activate the Test Management 2.0 (com.snc.test_management.2.0) and Test Management 2.0 — Data Migration (com.snc.test_migration_v1_v2) plugins.

Migrate data

The migration process allows you to move test suites, test cases, and tests.

Note:

- Test plans cannot be migrated due to significant change of data model.
- Test suites, test cases, and tests that are migrated to Test Management 2.0 will not be removed from Test Management 1.0.

Test cases that are migrated to Test Management 2.0 are converted to test versions in the following manner:

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Test Management 1.0: Test case	Test Management 2.0: Test version
Short Description	Short Description
Domain	Domain
Test Suite	Creates a relationship between test and test set
Prerequisites	Link to the old test case

Tests that are migrated to Test Management 2.0 are converted to test steps in the following manner:

Test Management 1.0: Test	Test Management 2.0: Test step
Order	Order
Domain	Domain
Detailed description	Link to the old test
Test	Step
Test data	Link to the old test
Expected result	Verification step

Test suites that are migrated to Test Management 2.0 are converted to test sets in the following manner:

Test set in Test Management 1.0	Test set in Test Management 2.0
Name	Name
Owner	Owner
Domain	Domain

Add custom fields to migration

You have added custom fields to the tables of Test Management 1.0, and want to move the fields to the corresponding custom columns in Test Management 2.0. In such a case, include the custom fields into migration by overriding the mapping information in the script include **TestMigrationTableMapping**. The default mapping is provided in the script include **TestMigrationTableMappingBase**.

Convert test suites

Convert test suites with underlying test cases to test sets and tests.

Convert test suites

Convert test suites in Test Management 1.0 to test sets in Test Management 2.0. Start using Test Management 2.0 for its enhanced testing capabilities and features.

Before you begin

- Role required: admin
- Install the Test Management 2.0 — Data Migration plugin (com.snc.test_migration_v1_v2).

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Procedure

1. Navigate to **All** > **Test Migration** > **Migrate Test Suites**.
   A list of test suites available in Test Management 1.0 are displayed.
2. Select the required test suites and convert to them to test sets.

What to do next

After converting test suites, verify that the migrated test sets and tests appear correctly in Test Management 2.0 before performing the migration on a production instance. For more information about verifying migrated data, see Migration from Test Management 1.0 to Test Management 2.0.

Appendix — Test Management 2.0

Test Management 2.0 offers a few enhancements over Test Management 1.0.

These enhancements can be divided into the following categories:

- Functionality enhancements
- Data model enhancements
- Usability enhancements

Functionality enhancements in Test Management 2.0

Test Management 2.0 offers a few functionality enhancements over Test Management 1.0.

Integration with Agile Development 2.0

Integration of Test Management 2.0 with Agile Development 2.0 provides embedded testing capabilities for scrum teams. Test Management 2.0 enables you to create tests for stories of the sprint, and also track the execution and completion of those tests. As a scrum lead or product owner, you gain an insight of the stories that are tested and are to be closed.

Data model enhancements in Test Management 2.0

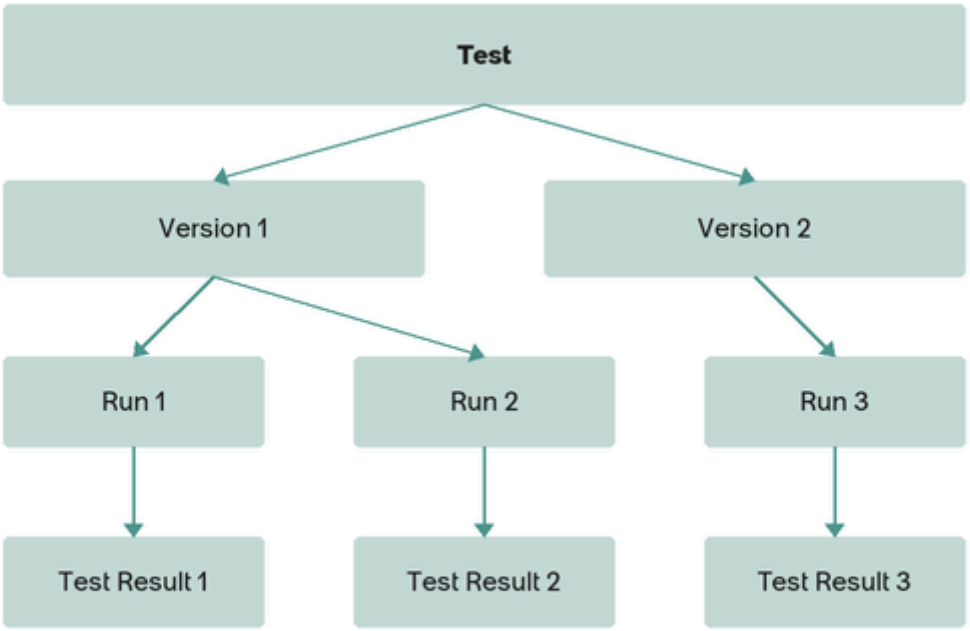
Test Management 2.0 offers a few data model enhancements over Test Management 1.0.

Enhanced traceability

Each test in Test Management 2.0 can have multiple versions. When a test version is in the state Ready, it can be run but cannot be edited. Every test result is associated with a specific run and a specific version of the test. Due to this logic,

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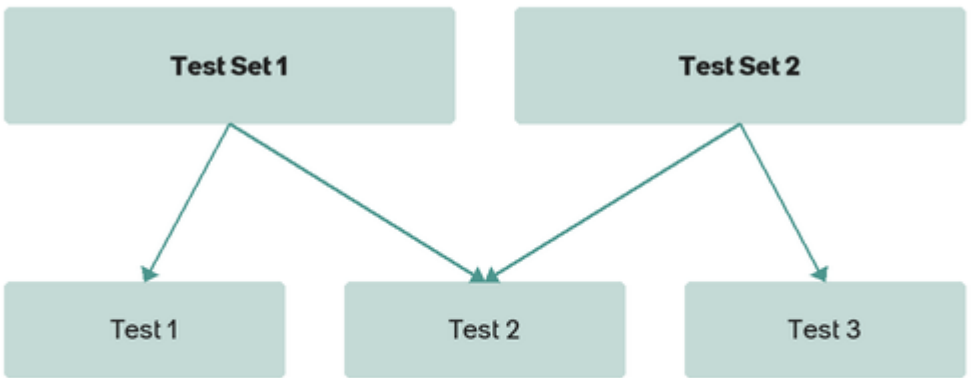
you can always be sure of the content of the test when a specific test result was



received.

More flexible approach to organize tests

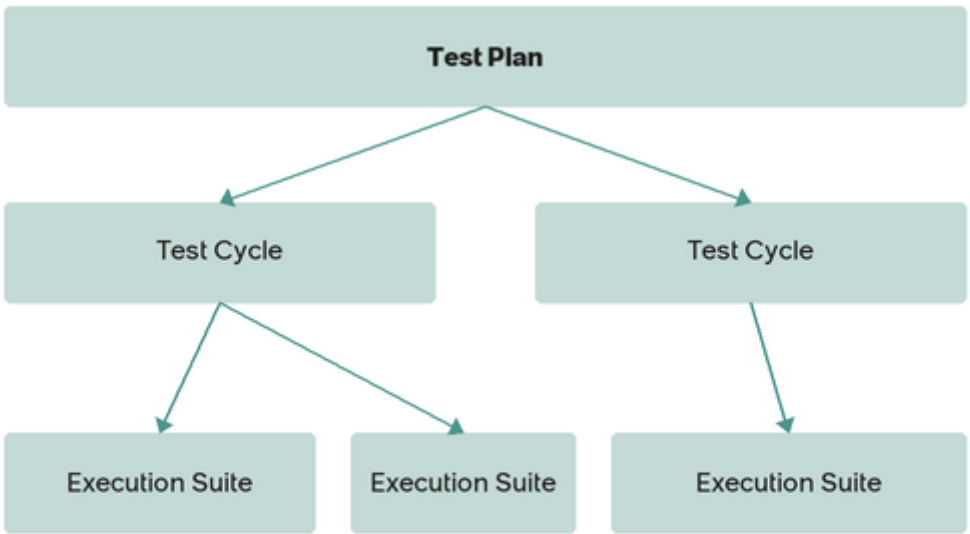
Unlike Test Management 1.0, where test cases can be placed in only one test suite, in Test Management 2.0 tests can be placed in multiple test sets. Test sets are free-form collections of tests. Tests can be grouped into test sets using any logic: by product, by component, or by release.



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Test plan defines the time frame

A test plan in Test Management 2.0 captures the time frame during which the tests are to be run. In addition, a test plan can be broken down into smaller planning windows, test cycles, for more precise planning, such as user acceptance testing, and integration testing. Further test cycles can be broken down into test execution suites, which are similar to sprints in testing. A test execution suite defines when a test must be run and by



whom.

Usability enhancements in Test Management 2.0

Test Management 2.0 offers a few usability enhancements over Test Management 1.0.

Create and track the execution of tests for stories of the sprint in the **Sprint Tracking** tab in Agile Board. In addition, you can:

- View the test result of each test.
- Run all the tests for a story at one time.

Easier way to create tests

Test Management 2.0 provides a new user experience for creating tests.

- Test steps can be created without leaving the context of test form.
- Entire test scenario can be created at one time. Type in the step description, and press Enter to proceed to the next step.
- You need not create an extra record to capture expected results. Expected results can be captured as another test step that is marked as a verification step.

Enhanced user experience for running tests

Test Management 2.0 provides a new user interface for running tests. The interface opens in a small browser window, which can be placed side by side with the system that is being tested. You can go through multiple tests at one time, without having to relaunch the window. Whenever a step is marked as failed or blocked, you can add a comment and attachment to record your observation.

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Visual approach of structuring test plans

Test Management 2.0 provides a designated user interface, Test Board, for creating and structuring test plans. As a test manager, you can create a test plan, test cycles, and test execution suites and define the time frame for their execution. The names of the test cycles and execution suites can be edited inline, without leaving the page. Test execution suites can then be filled with tests, and those tests can be assigned to testers.

The test plan work hierarchy item in the Test Board provides a visual representation of the timeline of the test plan and its child tasks using a blue task bar. The length of the task bar pertaining to the test plan increases and decreases depending on the adjustments you make to the duration of its child tasks. You can also manually increase or decrease the duration by dragging the edge of the task bar to the required location.

Business Planning Portal

A business plan includes a business goal and a plan to achieve that goal. Business planning involves various entities of a business such as goals, business units, business capabilities, capability map, enterprise strategies, and business unit strategies. As a business planner you can manage these entities from the business planning portal.

To access the business planning portal, the Business Planner (com.snc.apm.business_planner) plugin must be activated. This plugin is installed only when any one of the other Strategic Portfolio Management (SPM) plugins is already installed.

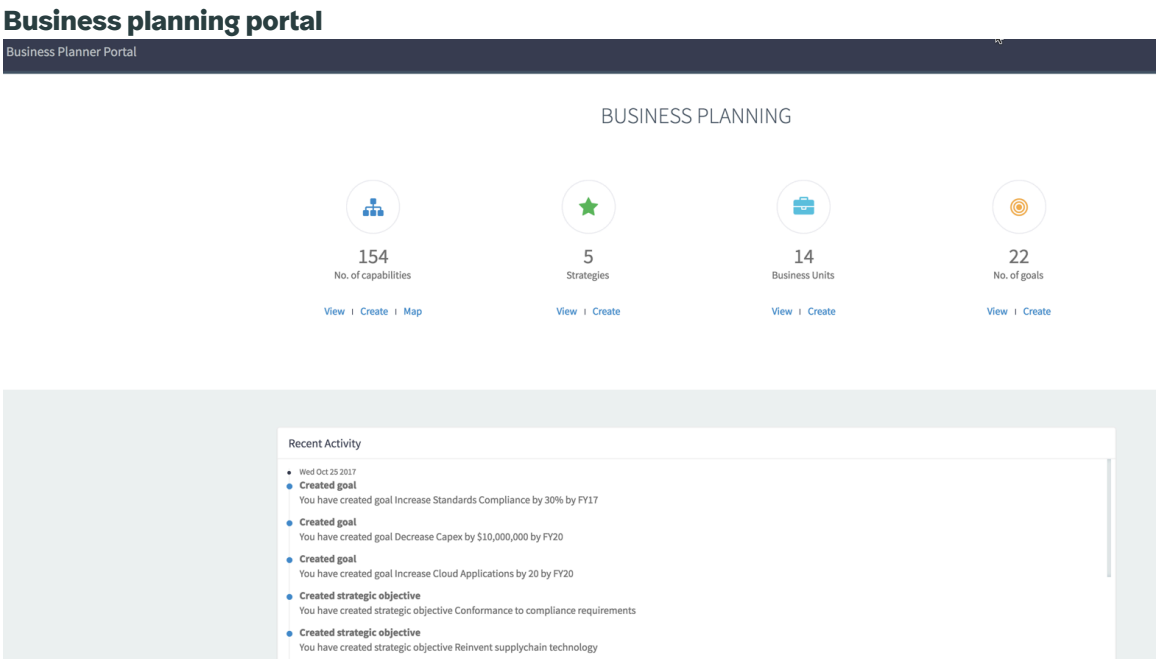
Access the business planning entities, goals, business units, enterprise strategy, business unit strategy, capabilities, and capability in the **Business Planner** module.

Business planning portal for the business planner

As a business planner, you can do various tasks from the business planning portal such as view, create, and update the business entities to achieve business goals. In addition, the Business Planner can use capability map for planning.

Note:
The role of a business planner involves only planning and managing the entities to achieve the business goal. It doesn't deal with the business applications or technologies that support the business.

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The business planning portal helps the business planner to view and create goals, business unit, capabilities, and strategies.

Number of capabilities

Displays the number of capabilities that have been created. Click to view the list of capabilities defined for the business enterprise. Create business capability and relate the capability with an application if the existing capabilities don't conform to your business plan.

If you have installed Enterprise Architecture (formerly APM), then the **Map** link is available. Click **Map** to launch the capability map.

Strategies

Displays the number of objectives that have been created. Click to view the list of strategic objectives that align with your business plans. Click to create a business unit strategy or an enterprise strategy to fulfill a new business plan. You can also assign strategies to a goal.

- Enterprise strategy is at a higher level and business unit strategies can be assigned at its child level.
- Business unit strategy is at a lower level and an enterprise strategy or a business unit strategy can be assigned as a parent strategy.

Business Units

A business unit is a segment of an enterprise that represents a business function. View the existing number of business units in your organization. Click to create a business unit to define its functions.

No. of goals

View the number of goals created to achieve a business plan. You can relate goals to many enterprise and business unit strategies. Similarly, more than one enterprise and business unit strategies can be related to more than one goal. Click a goal from the list to update its status and assign a task to it. You can also create a goal for an application strategy.

Recent Activity

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View the recent goals, strategic objectives, and business units that you had created.

Business units

Business units are parts of your organization that are in charge of certain operations, such as Finance, HR, IT.

Business units usually comprise departments and are associated with a company. By default, the Hierarchy of Segments includes a segment for business units, departments, and vendors, which are companies with the **Vendor** option selected. With the segment setup, you can allocate expenses to business units, departments, or vendors, or have expense allocations roll up to them. You can configure both departments and companies as part of user management.

Create business units

Create a business unit to define your organizational functions. A business unit is also necessary to set up the top-most segment in the hierarchy to create roll up rules and have expenses roll up to these business units.

Before you begin

Role required: business_planner

Procedure

1. Navigate to **All** > **Organization** > **Business Units**.
2. Click **New**.
3. Fill out the fields on the form (see table).
4. Click **Save**.

Business Unit form

Field	Description
Name	Name of the business unit.
Company	The company, if any, related with this business unit. You can choose any company, including the ones that don't have the **Vendor** field selected.
Business Unit Head	Person who heads the business unit.
Description	A description of the business unit.
Parent	Refers to another business unit. The **Parent** field makes the business unit as a hierarchy element.
Hierarchy level	Number or text to indicate the level of the business unit.

Related list section of the Business Unit form

Field	Description
Departments	Departments that comprise this business unit. Add as many departments as necessary.

The Departments related list isn't visible by default. If necessary, you can add the Departments related list on the business unit record you created. To add the Departments related list:

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a. Right-click in the form header, and select **Configure** > **Related Lists**.

b. Locate the **Departments** item in the **Available** box and move it to the **Selected** box.

c. Select **Save**.

Create an enterprise strategy

As a business planner you can manage the business entities such as goals, business units, business enterprise strategies, and business unit strategies. Create an enterprise strategy to orient your business plan toward your goal.

Before you begin

Role required: user_admin, business_planner

About this task

To understand how your organizational strategies are performing, see the Strategic Spend Tracking for PPM dashboard topic. It provides a comprehensive visual to help you understand how the planned costs, actual costs, and benefits for projects aligned to your organization's strategies trend over time.

Procedure

1. Navigate to **All** > **Business Planner** > **Enterprise Strategy**.

   You can also navigate to **Organization** > **Enterprise Strategy**.

2. Click **New** or open a record.
3. Fill in the form fields.

Enterprise Strategy form

Field	Description
Title	A short title describing the enterprise strategy.
Number	System assigned enterprise number.
Assigned To	Person to whom the enterprise strategy is assigned.
From Date	Date from which the enterprise strategy is valid.
To Date	Date until which the enterprise strategy remains valid.
Type	Select a type of organization strategy that this strategy aligns to.
Active	Enable the check box to make the enterprise strategy active.
Description	Short description about the enterprise strategy.

4. Click **Submit**.

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What to do next

Use the **Business Unit Strategies** related list to create a strategy for a business unit and associate the business unit strategy to the enterprise strategy, to another business unit, or to another business unit strategy.

Related topics

Allocate or modify the strategy and goal percentage for a project

Create a business unit strategy

Business units are segments of an enterprise that are in charge of certain operations such as Finance, HR, IT. Each of these business units can have a strategy that aligns with the enterprise or with another business unit.

Before you begin

Role required: user_admin, business_planner

Procedure

1. Navigate to **All** > **Business Planner** > **Business Unit Strategy**.

   You can also navigate to **Organization** > **Business Unit Strategy**.

2. Click **New** or open a record.
3. Fill in the form fields.

Business Unit Strategy form

Field	Description
Title	A short title describing the business unit strategy.
Number	System assigned business unit number.
Assigned To	Person to whom the business unit strategy is assigned to.
From Date	Date from which the business unit strategy is valid.
To Date	Date until which the business unit strategy remains valid.
Business Unit	The business unit for which the strategy is being created.
Strategy	Strategic objectives of the organization that the business unit strategy complies to.
Type	Select a type of organization strategy that this strategy aligns to.
Active	Enable the check box to make the business unit strategy active.
Description	Short description about the business unit strategy.

4. Click **Submit**.

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What to do next

View the strategic objectives that you've created in the business planning portal. The records of business planning strategic objectives give you a clear visibility of the status, to whom they're assigned to, the period of validity, and their type.

Cost Management

The ServiceNow® Cost Management application tracks configuration item costs. The costs can be allocated to business units and used in reports.

Cost management enables these features:

- Using rate cards.
- Defining configuration item (CI) costs.
- Tracking one-time costs for CIs.
- Processing recurring CI costs to generate expense lines.
- Distributing bulk costs to multiple expense line sources.
- Tracking costs related to tasks and projects.
- Aggregating configuration item costs and charging the total cost to a business service or application.
- Allocating expense lines to business units with flexible allocation rules.
- Tracking planned and actual budget costs by cost center.

Cost Management Options

Use the following cost management options to plan and control business costs.

- Create rate cards to properly track configuration item, contract, task, and labor costs.
- Create expense lines and expense allocation rules.
- Aggregate configuration item costs and apply the total cost to a business service or application using relationship paths.
- Create distribution costs and distribution cost rules to divide costs between a group of records.

Activate Cost Management

Activate the Cost Management plugin (com.snc.cost_management) using the admin role.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install**.

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Note:
When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

4. Select **Activate**.

Note:
To load the demo data, select the **Load demo data** check box.

Components installed with Cost Management

Several components are installed with the Cost Management application.

Demo data is available with Cost Management. The demo data provides sample budgets, distribution costs, expense allocations, contract rate cards, and rate card costs.

Tables

Cost Management adds the following tables.

Tables

Table	Description
Allocation Unit `[allocation_unit]`	Tracks capacity and usage for a business service. Stores reference to business service, total, allocated, and remaining units of capacity.
Budget `[fm_budget]`	Tracks planned and total expense allocation amounts for a collection of cost centers.
Budget Cost Center `[fm_budget_cost_center]`	Associates one or more cost centers to a budget.
CI Cost Center Relationship `[fm_cmdb_rel_cc]`	Associates a cost center to a business service that it consumes and the number of units it uses. This is used to calculate the number of allocated units to update the allocation unit record.
CI Rate Card `[fm_ci_rate_card]`	Links configuration items and costs. A classification can also be defined to allow for multiple rate cards for a group of CIs.
CI Rate Cards `[fm_ci_rate_card_cmdb_ci_m2m]`	Associates configuration items to a rate card.
Contract Rate Card `[fm_contract_rate_card]`	Provides detailed price information for a contract and enables you to generate recurring expenses automatically.
Distribution Cost `[fm_distribution_cost]`	Represents costs which can be divided among a group of records. For example, the cost of power at a datacenter which can be divided among the CIs in the datacenter.
Distribution Cost Rule `[fm_distribution_cost_rule]`	Determines how the costs are distributed to CIs.

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Tables (continued)

Table	Description
Distribution Units [fm_distribution_units]	Stores the number of units to associate to configuration items linked to the current rate card.
Expense Allocation [fm_expense_allocation]	Associates the value of an expense to a target reference. The value is generated from an expense line by processing allocation rules. The target is the record that is responsible for that expense amount. Common targets are cost centers, departments, companies, groups, and users.
Expense Allocation Rule [fm_expense_allocation_rule]	Determines how to process an expense line into an expense allocation. The logic starts by defining a table and condition to run against. Expenses linked to the selected table will be evaluated by this rule. If the condition is met, an allocation of a defined percentage is created for the reference defined by the allocation field value. Advanced scripts can also be used to define custom allocation generation.
Financial Management Log [fm_log]	Logs financial management information for tracking and to asset with debugging. Extends the system log table.
Labor Rate Card [fm_labor_rate_card]	Defines hourly labor rates for expense line generation based on functional roles.
Rate Card [fm_rate_card]	Associates configuration items to a rate card.
Rate Card [fm_recurring_rate_card]	Represents a collection of recurring costs.
Rate Card Cost [fm_ci_rate_card_cost]	Associates a recurring CI cost to a rate card so that it is applied to all CIs associated with the rate card.
Rate Card Users [clm_m2m_rate_card_user]	Associates users to a rate card.
Relationship Path [fm_relationship_path]	Defines the relationship between configuration items, such as parent records and child records.
Task Rate Card [fm_task_rate_card]	Stores records that define task costs.

User Roles

Cost Management adds the following user roles. A user with the user_admin or admin role can assign these roles.

User Roles

Role	Description	Contains Roles
Financial User (financial_mgmt_user)	Financial users participate in financial processes and have limited access to functionality.	None

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User Roles (continued)

Role	Description	Contains Roles
	Can read allocation units and expense allocations. Can create, read, and write rate cards and expense lines. Can create, read, write, and delete fixed assets, depreciation, distribution costs.	
Financial Admin (financial_mgmt_admin)	Financial administrators manage financial processes in the system. Can create, write, and delete allocation units, fixed assets, depreciation, rate cards, distribution costs, expense lines, and expense allocations.	financial_mgmt_user

Properties

Cost Management adds the following properties.

Properties

Name	Description
com.snc.time_card.default_rate	Sets a default hourly rate to use if no labor rate cards apply to the user.
glide.cost_mgmt.calc_actual_cost	Sums all task expense lines and adds the total to the **Work cost** field on the task record when an expense line is created for any task with a **Type** of **Planned task**.
glide.cost_mgmt.debug	Enables debugging of cost management processing. All logging events are recorded in the Financial Management Log `[fm_log]` table. This should only be enabled during initial testing or when troubleshooting because it can generate a large number of log records.
glide.cost_mgmt.process_task_cis	Creates expense lines to affected configuration items when creating a task expense line. The default value is **false**.
glide.cost_mgmt.service_allocation.method	Defines if business service to cost center allocation costs should be calculated based on total units or allocated units.

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UI Policies

Cost Management adds the following UI policies.

UI Policies

Name	Table	Description
Control flat rate vs bill rate fields	[fm_task_rate_card]	Hides the **Task rate** field and displays the **Default labor rate** field on the Task Rate Cards form if the **Use time worked** check box is selected.
Hide if define condition disabled	[fm_ci_rate_card]	Displays the **Table** and **Condition** fields on the CI Rate Cards form if the **Define condition** check box is selected.
Hide parent class if all enabled	[fm_relationship_path]	Hides the **Parent class** field on the Relationship Paths form if the **All parent classes** check box is selected.
Hide recurring fields for one time cost	[fm_distribution_cost]	Hides the **End date** and **Interval** fields on the Distribution Costs form if the **Recurring** check box is cleared.
Hide relationship type if all enabled	[fm_relationship_path]	Hides the **Relationship type** field on the Relationship Paths form if the **All relationships** check box is selected.
Hide Show Advanced Field	[fm_distribution_cost_rule]	Hides the **Table** and **Condition** fields on the Distribution Cost Rules form and displays the **Script** field if the **Advanced** check box is selected.
Hide table field	[fm_labor_rate_card]	Hides the **Table** field on the Labor Rate Cards form at all times.
Modify value field rules on distribution method	[fm_contract_rate_card]	Changes the **Value** field from read-only to mandatory on the Contract Rate Cards form if the **Distribute cost** field is set to **Allocate and distribute cost based on value**.
Show script field if advanced	[fm_expense_allocation_rule]	Displays the **Script** field on the Expense Allocation Rules form if the **Advanced** check box is selected.

Client Scripts

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Client Scripts

Name	Table	Description
Calculate Tax Cost - Base cost	[fm_rate_card]	On the contract rate card record, calculates the tax cost and total cost based on changes to the base cost.
Calculate Tax Cost - Sales tax	[fm_rate_card]	On the contract rate card record, calculates the total cost if the Sales tax option is selected.
Calculate Tax Cost - Tax rate	[fm_rate_card]	On the contract rate card record, calculates the tax cost and total cost based on changes to the tax rate.
Set Rate Card End Date	[fm_contract_rate_card]	On the contract rate card record, sets the rate card end date to the contract end date if the contract has an end date.

Business rules

Cost Management adds the following business rules.

Business rules

Name	Table	Description
Calculate Totals with Tax	[fm_recurring_rate_card]	Updates the **Tax rate**, **Tax cost**, and **Total cost** fields when **Sales tax**, **Base cost**, or **Tax rate** field values change.
Process time card	[time_card]	Creates an expense line after a time card is approved.
fm_calcBudgetValues	[fm_budget]	Updates remaining budget amount when planned or actual values change.
fm_Disable rate card costs	[fm_ci_rate_card]	Disables all rate card costs when a rate card is disabled.
fm_InsertBudget	[fm_budget]	Shows a message with the next budget number when a new record is inserted.
fm_Populate Month Field	[fm_expense_allocation]	Fills in the **Month** field based on the **Expense date** field.
fm_processExpenseAllocation	[fm_expense_line]	Processes expense allocation rules when an expense line is created for pending items.

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Business rules (continued)

Name	Table	Description
fm_Set default next process	[fm_ci_rate_card_cost]	Sets the default next process date for a new configuration item rate card cost.
fm_Set default next process	[fm_distribution_cost]	Sets the default next process date for a new distribution cost.
fm_updateAllocationAvailable	[allocation_unit]	Recalculates the number of available units when the number of allocated units is updated.
fm_updateAllocationUnits	[fm_cmdb_rel_cc]	Recalculates the number of allocated units for a business service.
Next process date validation	[fm_contract_rate_card]	If the next process date for the contract rate card is after the start date, this business rule sets the next date to the start date.
Prevent more than one allocation per ci	[allocation_unit]	Prevents more than one allocation per configuration item.
Process CI Relationships	[fm_expense_line]	Processes parent related items and generates expense lines for configuration item source expenses. Processes task cost into affected configuration item expense lines for task source expenses.
Process Task Rate Cards	[task]	Processes task rate cards when a task is set to inactive.
Update Contract	[fm_contract_rate_card]	Rolls costs from rate card to contract. Updates the contract total cost, tax cost, tax rate, and base cost when total cost, tax cost or tax rate values change.
Update Planned Task Actual Cost	[fm_expense_line]	Calculates the total actual costs from related expense lines for planned task source expenses.
Verify rate card's start and end dates	[fm_contract_rate_card]	Validates that the rate card start date is

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Business rules (continued)

Name	Table	Description
		specified and is not after the end date. This business rule also: • Validates that the rate card start date is not before the contract start date and that the rate card end date is not after the contract end date. • Sets the rate card end date to the contract end date if a value is not entered and the contract has an end date.

Cost Management Demo Data

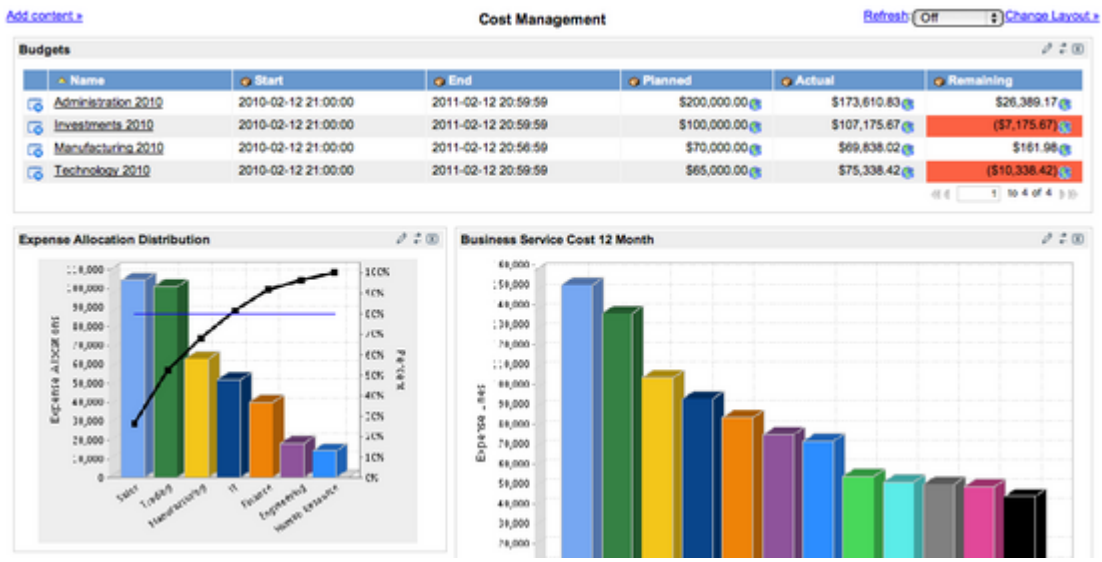
The demo data available with Cost Management provides samples of the data types to illustrate its use.

Demo data should be loaded only in a development or test instance to prevent conflict with production data.

High-Level Data Review

The Cost Overview module has a number of commonly requested reports.

Business Service Overview



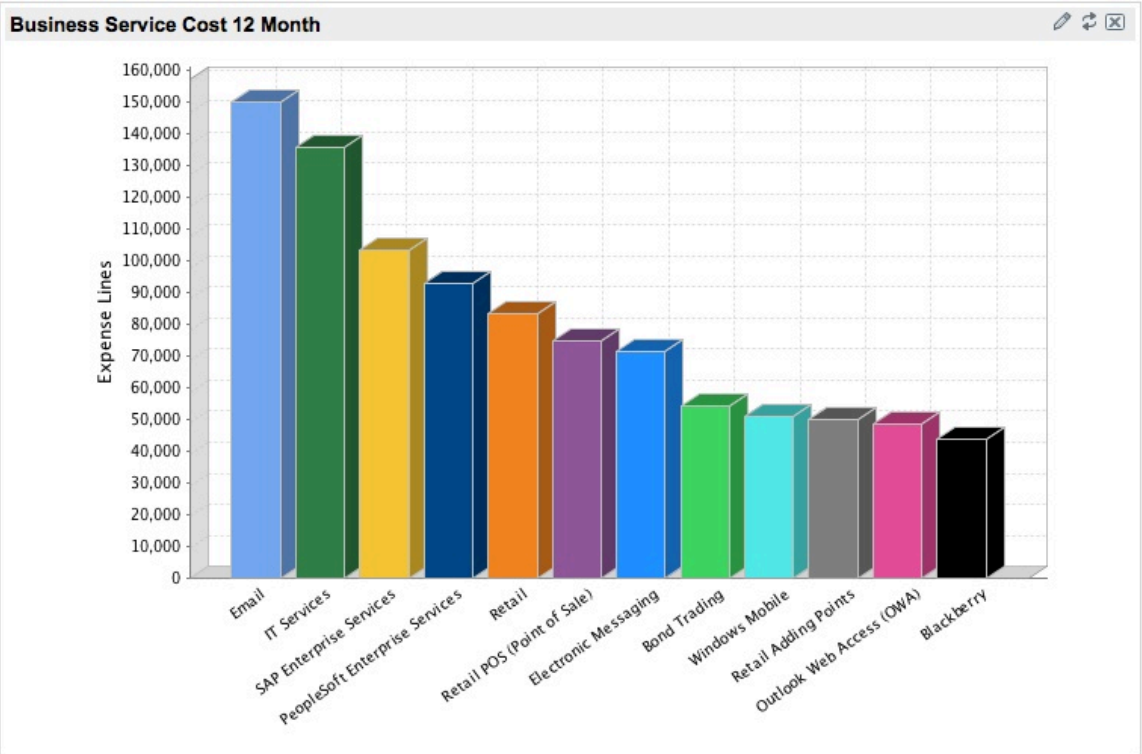
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Business Service Overview

The business service owner would like to know how much it costs to maintain the service over some period of time. This requires gathering the dependent CI costs and representing them at the business service level. For CI costs to roll up to business services, relationships must exist between CIs and services.

The demo data contains a number of services that have costs from their dependent CIs. In the **Cost Overview** homepage, the **Business Service Cost 12 Month** report shows an overview of this information:

Cost Report



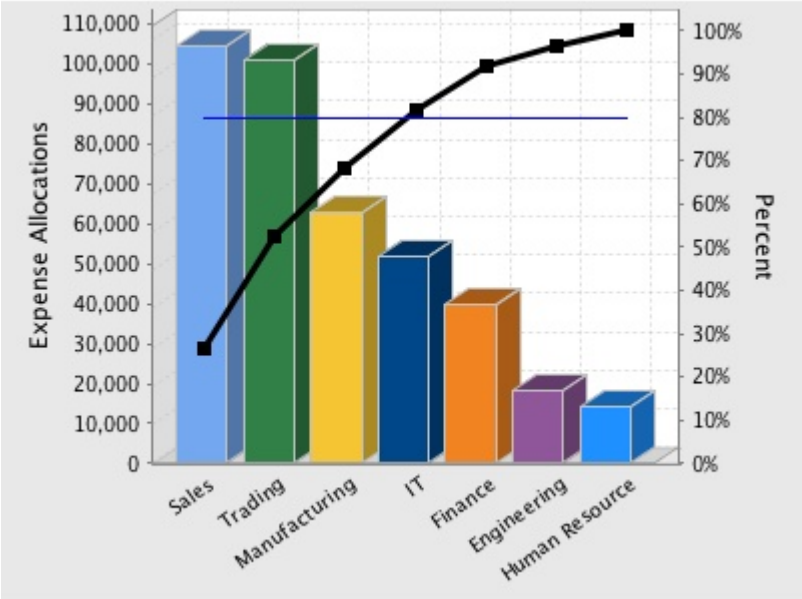
Allocation Overview

Expense allocation rules costs allow you to allocate costs to one or more business entities such as a user, group, department, company, or cost center. The purpose of the allocation is to represent the cost that the business is responsible for. This is not considered charge-back or billing, but could be used as a source for billing. The primary purpose of expense allocation is to represent the consumer of the process that has incurred some expense.

The following diagram shows the distribution of expenses to cost centers.

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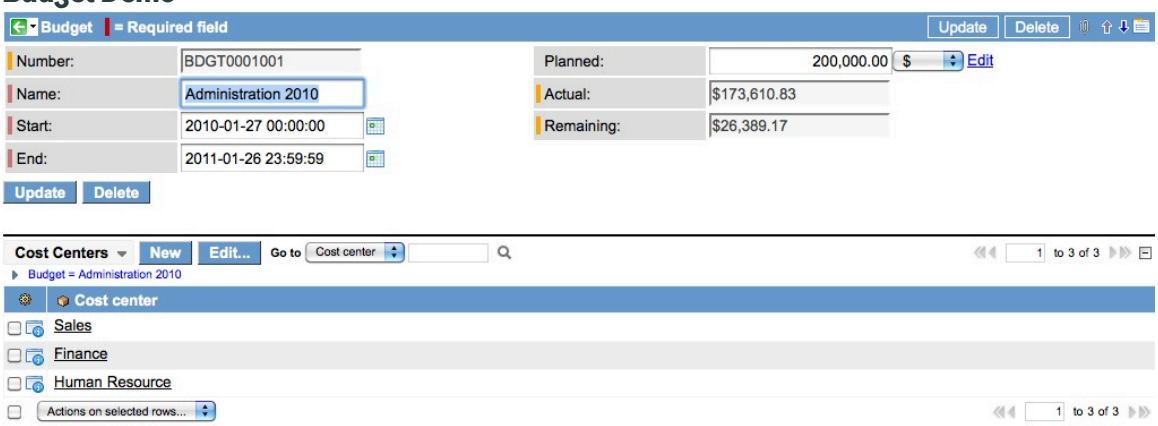
Report example



Budget Overview

The amount of money allocated to cost centers can be tracked against a planned budget. A budget represents a collection of cost centers, a duration, and the amount of money that is expected to be allocated to the cost centers during that period. The administration budget contains three cost centers and has incurred $173,610.83 so far during this period.

Budget Demo



Cost overview module

The Cost Overview module displays various cost management reports.

It gives financial administrators and other users a summary view of key cost management information.

The Cost Overview is a type of homepage.

Only users with certain roles have access to the Cost Overview module. See Cost overview module roles for more information.

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Cost overview module roles

Only certain roles can customize Cost Overview modules. In addition to viewing, roles with access can refresh, add, delete, and rearrange reports.

Cost Overview Module Role Access

Role	Access
admin	View, customize
asset	View, customize
financial_mgmt_admin	View
financial_mgmt_user	View
procurement_user	View
sam	View

CI rate cards

A configuration item (CI) rate card is a group of recurring configuration item costs associated with multiple configuration items. Rate cards make it easier to enter and track costs that are the same across multiple configuration items.

Rate cards usually follow a framework in which all costs are recorded and allocated. For example, the contract costs of a specific model server in a New York datacenter could be different than the same server model running in a Madrid datacenter. Each model would have a separate rate card detailing the costs.

Users with the Financial Admin (`financial_mgmt_admin`) and Financial User (`financial_mgmt_user`) roles can manage CI rate cards.

Create a CI rate card

You can add a CI rate card that specifies an hourly rate and associate a rate code.

Before you begin

Role required: financial_mgmt_admin

Procedure

1. Navigate to **All** > **Cost** > **Costs** > **CI Rate Cards**.
2. Click **New**.
3. Fill in the fields, as appropriate.

Field	Description
Number	[Read-only] The CI rate card identification number. Automatically assigned.
Define condition	Check box that indicates whether to use the **Condition** field to filter configuration items for the rate card.

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Field	Description
Name	The CI rate card name.
Summary type	The CI rate card category: **Grow Business**, **Run Business**, or **Transform Business**. Categorizing can be useful for reporting.
Active	Check box that indicates whether the rate card is available for use. Clear the check box to disable the rate card and deactivate all associated rate card costs.
Table	The table to query with conditions for configuration items. This field is available if **Define condition** is selected.
Condition	The condition to query on the specified **Table**. This field has a condition count widget to preview what records are captured by the conditions. This field is available if **Define condition** is selected.
Short Description	A brief description of the rate card.

Add a condition to a CI rate card

If you are adding a condition to a CI rate card, use the **Update CI List** related link to create the relationship between the configuration item or items and the rate card.

Before you begin

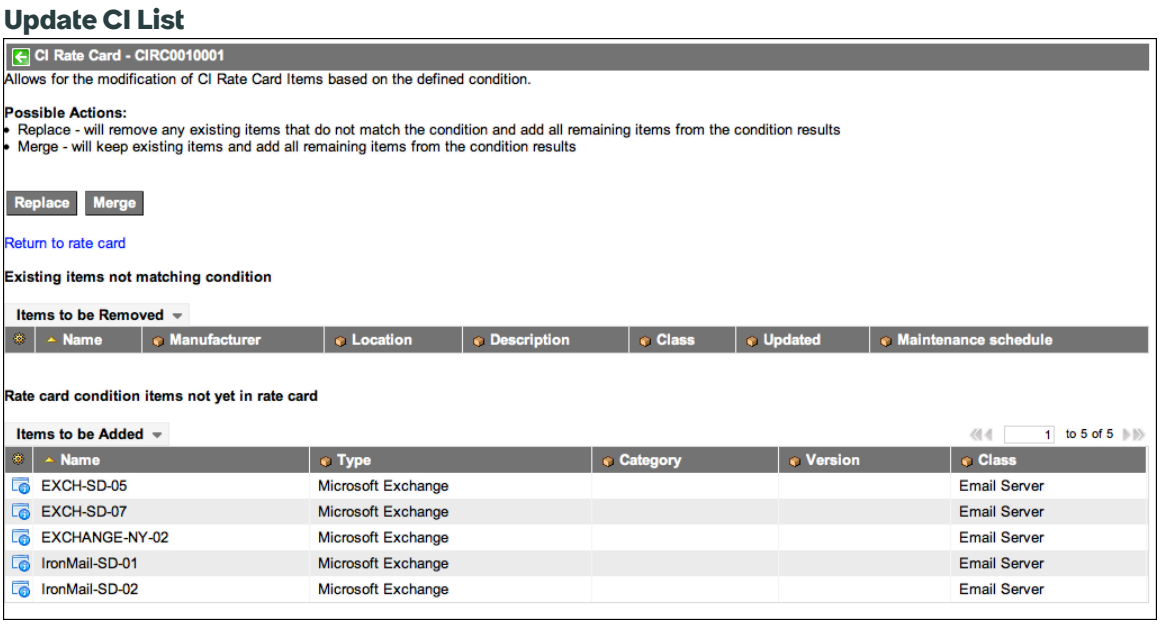
Role required: financial_mgmt_admin

Procedure

1. Navigate to **All** > **Cost** > **Costs** > **CI Rate Cards**.
2. Select a rate card.
3. Select **Define condition**.
4. Create the Condition.
5. Right-click the header bar and select **Save**.
6. In **Related Links**, click **Update CI List**.

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Example



7. Click one of the choices.
   - **Replace:** removes any existing items that do not match the condition and adds all remaining items from the condition results.
   - **Merge:** keeps existing items and adds all remaining items from the condition results.
8. Click **Return to rate card**.

CI rate card costs

CI rate card costs generate expense lines for configuration items on the associated rate card

Costs associated with rate cards are stored in the Rate Card Cost (`fm_ci_rate_card_cost`) table. Each cost is applied to every configuration item associated with the rate card when the costs are processed.

Expense Line is active by default.

Add a CI rate card cost

You can add a rate card cost to the CI rate card.

Before you begin
Role required: financial_mgmt_admin

Procedure

1. Navigate to **All** > **Cost** > **Costs** > **CI Rate Cards**.
2. Select a rate card.
3. In the **Rate Card Costs** related list, click **New**.
4. Enter a **Start date**.
5. Fill in the fields, as appropriate.

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Field	Description
Number	[Read-only] The rate card cost identification number. Automatically assigned.
Rate card	The identification number of the rate card to which this rate card cost is associated.
Name	The rate card cost name.
Active	Check box that indicates whether to enable cost processing for this cost.
Short description	A brief description of the rate card cost. The description is used to identify the processed cost on an expense line record.
Start date	The date the cost should start being processed.
End date	The date the cost should stop being processed.
Interval	The frequency at which the rate card cost recurs.
Recurring	Check box that indicates whether the cost is a repeating cost. Also sets generated expense lines to show as recurring. If this check box is cleared, no further expenses are generated automatically.
Sales tax	Check box that indicates whether to apply sales tax to the cost.
Tax rate	The tax rate to apply to the cost.
Order	Used by task rate cards.
Last processed	[Read-only] The date and time this cost was last processed.
Next process	The next date on which new expenses will be processed based on the Process FM Costs scheduled job.
Base cost	The amount that must be paid before taxes.
Tax cost	Total cost of the tax.
Total cost	Total rate card cost, including taxes.
Description	Detailed description of the rate card cost.

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Remove a rate card cost

You can remove a rate card cost on the CI Rate Card form.

Before you begin
Role required: financial_mgmt_admin

Procedure

1. Navigate to **All** > **Cost** > **Costs** > **CI Rate Cards**.
2. Select a rate card.
3. In the **Rate Card Costs** related list, click a **Number**.
4. Click **Delete**.

Disable a rate card cost

To prevent a cost from processing, clear the *Active* option. Use the option to make a rate card cost permanently inactive or to temporarily skip a cost from processing.

Before you begin
Role required: financial_mgmt_admin

Procedure

1. Navigate to **All** > **Cost** > **Costs** > **CI Rate Cards**.
2. Select a rate card.
3. In the **Rate Card Costs** related list, click a **Number**.
4. Clear the **Active** check box.

Modify a rate card cost

Configuration item costs often change over time as facilities or vendor rates change.

Before you begin
Role required: financial_mgmt_admin

About this task
Expense lines are the snapshot of a given interval's costs, so changing the cost does not affect already generated expense lines. When costs change, either modify the cost amount or disable the current cost and create a new cost to represent the cost going forward. The changes are processed in the next generated expense line. To keep historical records of costs, create new costs rather than modifying existing ones and set the end date of the disabled cost to show that the cost agreement expired.

Procedure

1. Navigate to **All** > **Cost** > **Costs** > **CI Rate Cards**.
2. Select a rate card.
3. Click a rate card cost **Number**.
4. Modify the fields, as necessary.

Aggregate CI costs

Expense lines can be aggregated to apply all configuration item expenses to a parent business service or application with relationship paths.

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Define relationship paths from a child configuration class to one or many parent classes. If a path does not match one of the relationship path record criteria, the path is not viewed as a relationship when determining expense aggregations. See CI relationships.

Enable relationship aggregation

The Process Last Month CI Costs scheduled job processes costs of configuration items. To start aggregating expenses to parents, identify the relationships to use for aggregation. Because there are many options for CMDB relationships, using all available paths for aggregation is generally not efficient.

Before you begin

Role required: financial_mgmt_admin

About this task

You can have multiple relationships for each child class. For example, to enable only certain relationships or parent classes, create a new record for each type and class combination paired with the child class.

When an expense line is generated from a configuration item cost, the parents of the configuration item are evaluated. The parent class and relationship type are compared to the list of relationship path records to see if there is a match to use for aggregation. If there is a match, an expense line is generated for the parent configuration item. The process repeats for all parents until there are either no parent relationships or the relationships in place do not meet the criteria defined in the relationship path records.

Procedure

1. Navigate to **All** > **Cost** > **Administration** > **Relationship Paths**.
2. Click **New**.
3. Fill in the fields, as appropriate.

Field	Description
Active	Check box that indicates whether the relationship path is enabled.
Child class	The child configuration item class. This class is the source of the expense generated during configuration item cost processing.
All parent classes	Check box that indicates whether CI relationships in the CMDB to all parent classes are processed.
Parent class	A valid parent CI class for the selected child class. Available only if **All parent classes** is not selected.
All relationships	Check box that indicates whether all relationship types between the child and parent classes are processed.
Relationship type	The type of relationship to process between the child and parent classes. Available only if **All relationships** is selected.

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What to do next

When a configuration item has multiple parents that have valid relationship paths, the amount aggregated to each parent is split to prevent over-aggregation of a item cost. When evaluating parent relationships to active relationship paths, the aggregation counts the total number of valid relationships. The expense line amount from the child configuration item is evenly divided among the number valid paths and that amount is used when creating the inherited expense line for the parent.

Task and labor rate cards

In Cost Management, task rate cards and labor rate cards capture operating costs by generating expense lines representing the cost of performing a task

- Task rate cards are templates used to define the type of task and the method of calculating the associated costs.
- Labor rate cards are templates used to define worker's labor rates when calculating task cost based on time worked.

Manage a labor rate card

The labor rate card associates a rate code with a labor rate.

Before you begin

Role required: financial_mgmt_admin

Procedure

1. Navigate to **All** > **Cost** > **Labor Rate Cards**.
2. Create or edit a record (see table for details).

Field	Input Value
Name	String field summarizing the purpose of the rate card.
Rate code	For reference use only, if you want to align rates with an external system.
Rate type	The rate type that is used to determine if the labor rate card matches with the rate type on the time card.
Active	Check box which determines if the rate card will be actively used.
Hourly rate	Identifies the hourly rate to be applied to task time worked entries if the worker meets the condition defined.
Condition	Defines a filter on the user table to determine whether the task time worked user applies to this rate card. This field uses the Condition Count Widget to preview what records would be returned by the conditions.

Rate type in labor rate card

The rate type functionality is used to categorize different types of work. For example, Standard versus Overtime.

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The Labor Rate Card form contains options to specify rate type, specify hourly rate for the rate type, and specify users for whom the labor rate card is applicable. A single user can be associated with multiple labor rate cards that contain different rate types.

Assume that a user logs time against a task and selects the rate type Standard in the Time Cards form. Upon approval, the expense line (cost) for the time card is derived by matching the user and rate type on the time card to a labor rate card assigned to that user, and that has the same rate type. When the user has multiple labor rate cards with the same rate type, the expense line is generated based on the labor rate card that has the lowest value in the **Order** field. When there is no labor rate card associated with the user and rate type, the default hourly rate found in the**Time Sheets** > **Administration** > **Time Sheet Policy** form is used (**com.snc.time_card.default_rate** property).

Note:
A user can enter a rate type only if it is permitted by the users Time sheet policies.

Related topics

Create a rate type

Manage a task rate card

Task rate cards are rate cards associated with records in a task table.

Before you begin

Role required: financial_mgmt_admin

Procedure

1. Navigate to **All** > **Cost** > **Costs**.
2. Create or edit a record (see table for details).

Field	Input Value
Name	String field summarizing the purpose of the rate card.
Table	Which type of tasks the rate card applies to.
Order	If more than one task rate card apply to the same task, the one with the lowest order is used.
Active	Check box which determines if the rate card will be actively used.
Summary type	High-level type of expense for easier summary reports. This value will be used to set the expense line summary type field.
Condition	Filter to run on the table selected to determine whether this rate card applies to a given task. This field uses the Condition Count Widget to preview what records would be returned by the conditions.
Task rate	Rate of the task, with a currency list. To add a new currency, use the **Edit** link.

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Field	Input Value
Use time worked	By default a flat rate per task is defined in the rate card. Selecting the check box will force the rule to calculate the task cost based on the related task time worked entries.
Default labor rate	Defines the default hourly rate to apply to the time worked entries if the worker does not have a labor rate card. Displayed when **Use time worked** is selected.

Process task rate cards

The business rule Process Task Rate Cards runs when tasks close and checks to see if any task rate cards apply. If they do, an expense line is created according to the rate card.

The process flow of the "Process Task Rate Cards" business rule is:

1. Task closes.
2. Business rule runs.
3. Query active task rate cards in order looking for a matching condition.
4. Qualifying rate card not using time worked.

   Generate expense line linked to the task using the task rate value.
5. Qualifying rate card using time worked.
   a. Get task time worked entries for the task grouped by user (worker).
   b. For each user, check to see if they match conditions in any of the labor rate cards.
      i. Labor rate card found, generate expense line using the time worked and labor rate.
      ii. Labor rate card not found, generate expense line using the default labor rate from the task rate card.

Budgets and cost centers

Understand what budgets and cost centers are and how to manage them in the Cost Management application.

Budgets

Budgets allow tracking of planned and actual spending. Budgets are defined for a given time period for one or more cost centers.

Cost centers

Cost Centers are used to represent a business entity. All expense allocations assigned to the budget's cost center during the budget period are used to calculate the budget's actual expense allocations.

It is also possible to assign a cost center to a budget from the cost center record. The cost center record contains a budgets related list.

Budgets and cost centers example

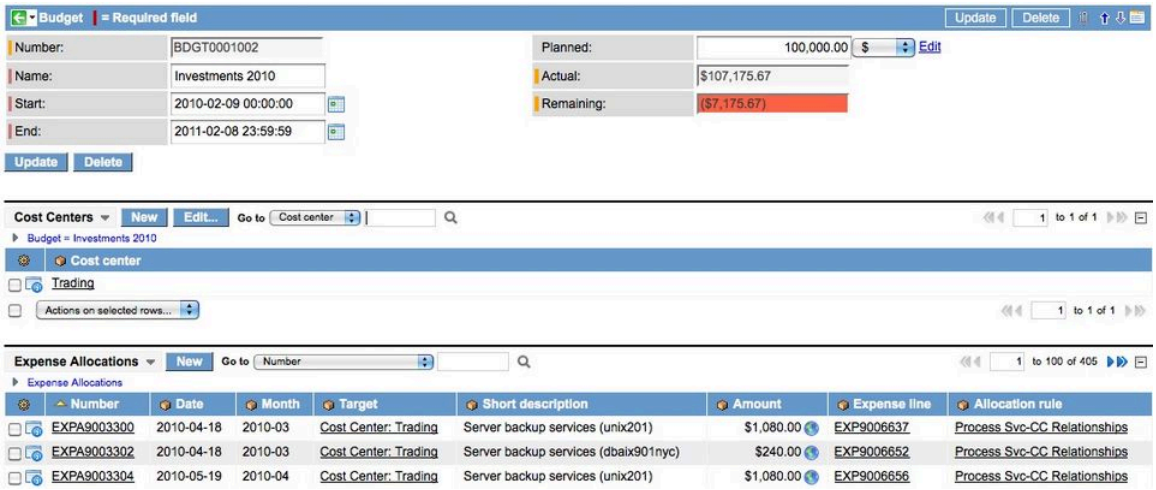
The most common business entity to associate financial information is the cost center.

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The example here shows how cost centers can be allocated expenses based on service usage. This example uses that information to compare with a defined budget for the cost centers.

A budget is a placeholder for an amount of planned spending for one or more cost centers. To view an example, navigate to **Financial Management** > **Budgets** and select the **Investments** budget:

Cost Demo Budget



This budget has a defined start and end date, planned amount, and actual amount. In the **Cost Center** related list, **Trading** is a member.

For all expense allocations assigned to the **Trading** cost center during the budget time periods, the allocations will be totaled to populate the actual budget field. The related expense allocation records can also be viewed in the **Expense Allocations** related list.

Create or update cost centers

Define a new cost center or update the details of the existing cost centers.

Before you begin

Role required: financial_mgmt_admin

Procedure

1. Navigate to **All** > **Cost** > **Config** > **Cost Center**.
2. Select a cost center record to edit or select **New** to create one.
3. On the form, fill in the fields.

Cost Center form

Field	Description
Name	Name of the cost center.
Manager	Manager of this cost center.
Account number	Account number for this cost center.
Valid from	Date this cost center is valid from. Select a date using the calendar option.
Code	Code assigned to this cost center.

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Field	Description
Valid to	Date this cost center is valid up to. Select a date using the calendar option.
Location	Location of this cost center. Select one using the lookup option.
Parent	Parent cost center, if any. Select one using the lookup option.

4. Select **Submit**.

What to do next

Review the related lists for this cost center and update them as necessary. See Cost centers related records.

Related topics

Budgets and cost centers

Create or update a budget

Cost management provides budgets for you to plan expenses for a certain time period.

Before you begin

Role required: financial_mgmt_admin

Procedure

1. Navigate to **All** > **Cost** > **Config** > **Budgets**.
2. Select a Budget to edit or select **New**.
3. Fill in the form (see table)

Budget form

Field	Input value
Number	System generated record number.
Name	String field for the name of the budget.
Start	Date field defining the beginning of the budget period.
End	Date field defining the end of the budget period.
Planned	Currency field representing the planned amount of expenses for the associated cost centers during the budget period. This value is inputted or imported.
Actual	Currency field representing the actual amount of expenses for the associated cost centers during the budget period. This is a calculated field using the list of expense allocations for the cost centers.
Remaining	Currency field representing the amount of planned minus actual expenses. This is a calculated field.
Projected	Currency field representing the estimated amount of expenses for the associated cost centers during the budget period. An average daily expense amount is calculated and applied to the rest of the budget period to determine the estimated projection.

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What to do next

Review the related lists for this budget and update them as necessary. See Budget related records.

Related topics

Budgets and cost centers

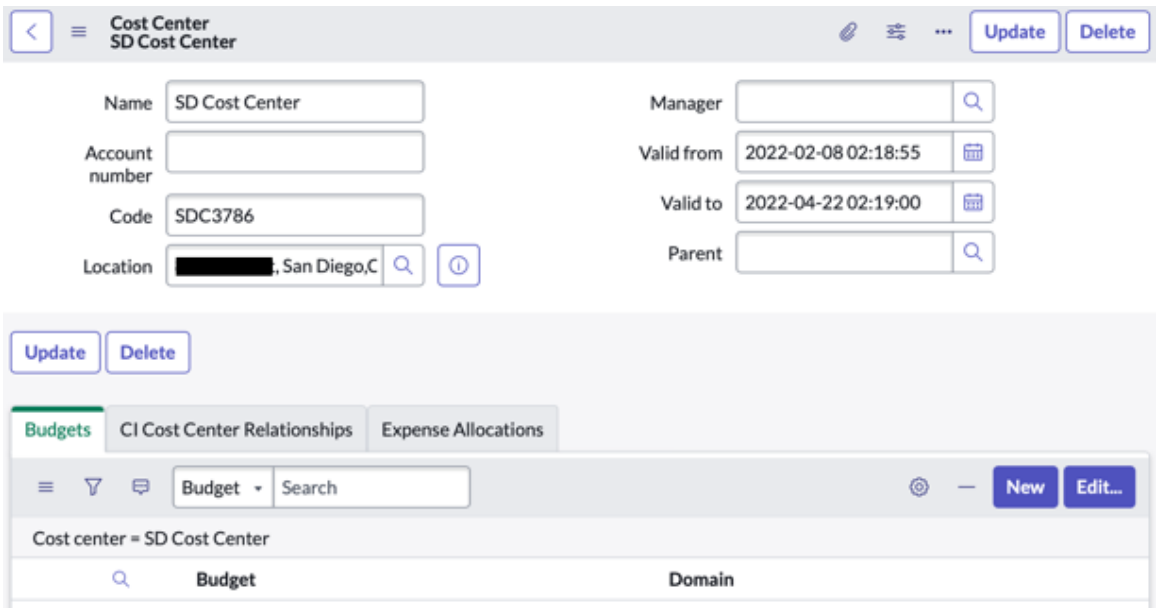
Cost centers related records

Cost centers are related to additional records, displayed as related lists on its form.

The Cost Management plugin adds the following related lists to the cost center record. You can add additional records in these related lists or remove existing ones.

- Budgets: Budgets that this cost center is a member of.
- CI Cost Center Relationships: Defines how much of a business service capacity this cost center is consuming.
- Expense Allocations: Shows all the expense allocation records that have this cost center as the target.

Cost center related lists



Associate cost centers to a budget

You create cost centers and associate budgets and expense allocations with them.

Before you begin

Role required: financial_mgmt_admin

Procedure

1. Open an existing budget from the **Cost** > **Config** > **Budgets** module.
2. Make sure the Cost Centers related list is displayed.
3. Use the Edit to add or remove existing cost centers from the budget.
4. Use the New button to create a new cost center record.

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Using distribution costs and rules

Distribution Costs are costs which can be divided among a group of records.

For example, the cost of power at a datacenter which can be divided among the CIs in the datacenter.

Distribution Rules determine how the Distribution Costs are divided among the CIs.

Defining Distribution Costs

To define new distribution costs, navigate to **Financial Management** > **Cost Management** > **Distribution Costs**, and select **New**. Populate the following fields:

Defining Distribution Costs

Field	Input Value
Number	A system-generated unique identifier for the Distribution Cost.
Name	A human-readable identifier for the cost.
Amount	The amount of the cost, with a currency list. To add a new currency, use the **Edit** link.
Distribution Rule	Select a Distribution Rule to determine how the costs are distributed to CIs. For more information, see Distribution Rules.
Active	Determines if the cost is actively used.
Start Date	The date of the cost, or if the cost is recurring, the first date of the cost.
Recurring	If checked, the cost will recur, and will be added regularly.
End Date	If *Recurring* is *true*, the last date to add the distribution cost.
Summary Type	Identifies a high-level type of expense for easier summary reports. This value will be used to set the expense line summary type field.
Interval	If *Recurring* is *true*, the time between each addition of the distribution cost between *Start Date* and *End Date*.
Last Processed	A read-only display of the last time the distribution cost was processed.
Next Process	A read-only display of the scheduled next process date.

Defining distribution rules

Define distribution rules to view distribution costs that are distributed according to the rules.

To define new distribution rules, navigate to **Financial Management** > **Admin** > **Distribution Cost Rules**, and select New and populate the following:

Distribution Rules form

Field	Input Value
Name	A unique name for the rule.
Active	Determines if the rule is actively used.

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Distribution Rules form (continued)

Field	Input Value
Advanced	If checked, the distribution rule will be determined by script. If not checked, it will be determined by table and conditions.
Description	A description of the rules and any notes on its use.
Script	If *Advanced* is *true*, the script which will determine the rule's behavior.
Table	If *Advanced* is *false*, a list list of tables to find the records to distribute the cost to.
Condition	If *Advanced* is *false*, a condition builder to determine which records will receive the distributed cost, on the table determined by the *Table* field. Cost amount will be distributed evenly across the records identified by the table and condition values. This field uses the Condition Count Widget to preview what records would be returned by the conditions.

Once submitted, the Distribution Costs related list is displated, which helps determine which costs will be distributed according to the rules.

Scripted distribution

Scripted distributions allow for custom distribution amounts, versus the evenly split distributions when using table and condition filters.

To enable scripted processing on a distribution rule:

- Check the advanced field check box, this will display the script field.
- Build the script using the following concepts:
  - Query for target records and data to use for calculating the allocation amount.
  - Create expense line records using the ExpenseLine API.

    For more information, see ExpenseLine.

As noted in the default script, when the advanced field is enabled, the following variables are available during the script processing:

- `distCost` - GlideRecord for the distribution cost, allowing access to all fields.
- `distCostAmount` - cost amount in the system currency.

Processing Distribution Costs

A scheduled job called *Process FM Costs* automatically processes distribution costs daily.

Use business services with expenses

Manage the relationships between business services and their expenses with allocation units and cost centers.

Define a cost center

Cost centers are a commonly used reference between financial systems and IT. Cost center records represent business entities, and have a related list of CI Cost Center Relationships that measure the cost center's consumption of business services.

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Before you begin
Role required: financial_mgmt_admin

Procedure
1. Navigate to **All** > **Cost** > **Config** > **Cost Center**.
2. Select a record to edit or select **New**.

Field	Description
Name	A unique name for the cost center.
Account Number	An account number associated with the cost center, if one exists.
Code	A code associated with the cost center, if one exists.
Location	A reference to the location of the cost center.
Manager	A reference to the user who manages the cost center.
Valid from	The date that the cost center is valid from.
Valid to	The date that the cost center is valid to.

CI Cost Center Relationships

Field	Description
Service	A reference to a Business Service.
Cost Center	The cost center to apply the relationship to. If reached through the related list, it should already be related to the appropriate cost center.
Allocation Percentage	Feature not yet implemented.
Allocation Type	A choice list. Should be **Units**.
Allocation Units	The number of units that the cost center is using. This is measured using the same type of unit used to define the total capacity of the business service in the allocation unit record. This number will be used to update the number of allocated units in the allocation unit record. It will also be used to determine the amount of expenses to allocate to the cost center based on the percentage of business service used versus the total capacity.

Default allocation rule

For every expense line generated for a business service, the default allocation rule Process Svc-CC Relationships will attempt to process the expense and create allocations for each cost center that is consuming the service.

The amount of the expense allocation is calculated by dividing the number of units the cost center is consuming by the total number of units for the business service. This calculation method is refereed to as "all unit" allocation as it uses the total unit capacity to determine the allocation percentage.

Refer to the demo walk-through for a detailed example.

For a given business service expense line, it is typical that less than 100% of the expense would be allocated using this method not all units have been allocated to cost centers. The unallocated

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expenses could be considered IT overhead. Some organizations prefer to show 100% expense allocation regardless of how many units are in use. This method is referred to as "allocated unit" since the percent of allocation calculated by dividing the number of units the cost center is consuming by total number of allocated units from all cost centers.

Allocation calculation method	Example
all_units	Service supports 100 units but only has 50 units allocated, and cost center ABC is allocated 25 units. This method will result in an allocation cost of 25/100, or 25% of the total cost of the service. 50% of the expenses (from the 50 unallocated units) will not be allocated.
allocated_units	Service supports 100 units but only has 50 units allocated, and cost center ABC is allocated 25 units. This method will result in an allocation cost of 25/50, or 50% of the total cost of the service. 100% of the expenses will be allocated, showing full cost recovery.

This is a system wide setting that can be configured by navigating to **Financial Management** > **Properties** module and selecting an option from the choice list.

Define an allocation unit

Allocation unit records define the capacity and usage of a business service.

Before you begin

Role required: financial_mgmt_admin

Procedure

1. Navigate to **All** > **Cost** > **Config** > **Allocation Units**.
2. Select a record to edit or select **New**.

> **Note:**
> Selecting the name of the configuration item will display the CI record, not the Allocation Units.

Field	Description
Configuration Item	Select the Business Service to define allocation units for.
Total Units	The total number of units of expense available to allocate. A unit is a generic measurement which can represent anything. Should match the cost center relationship unit. What units represent can be recorded in the **Unit Type** field. Using the *Total units* option may result in unallocated expenses if there are unallocated business service units. Using the *Allocated unit* option always results in 100% expense allocations.
Allocated Units	How many of the total units are allocated. Populated by script.
Available Units	How many of the total units are unallocated. Populated by script.
Updated	When the units were last updated.

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Field	Description
Unit Type (added by configuring the form)	Used to record what the units represent (e.g. seats, licenses, Gigabytes, and so on).

Cost sources

There are a several ways to generate expense lines for objects in the system.

These are generally classified as one of three types:

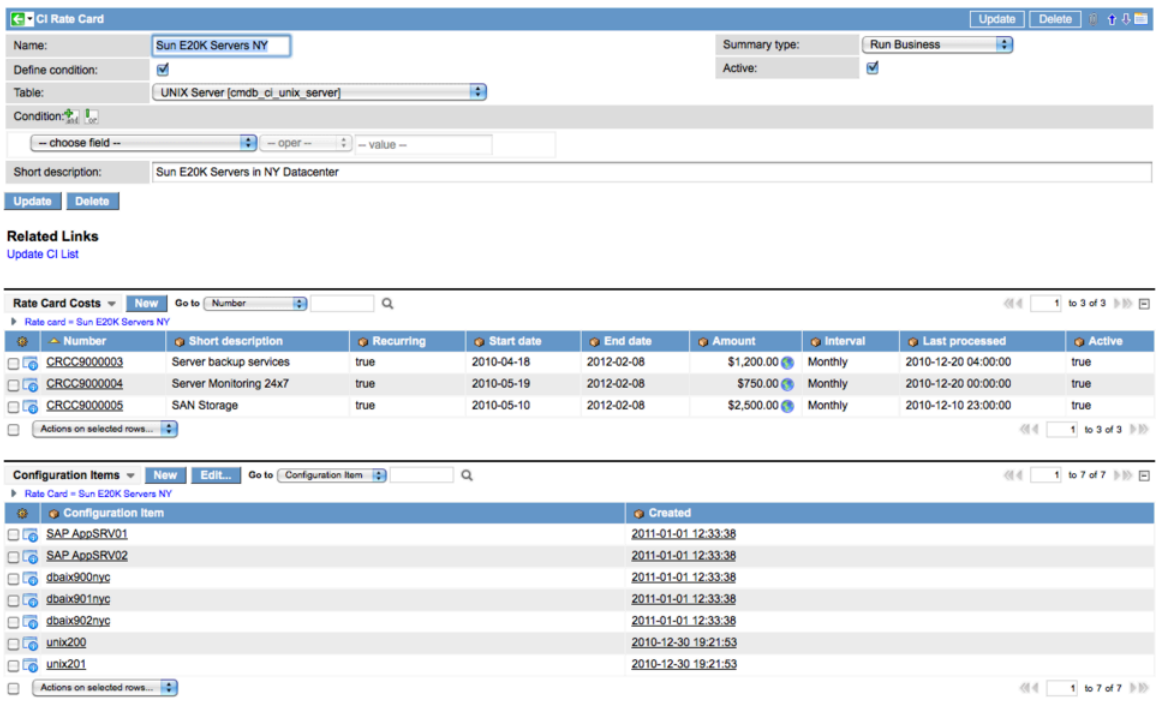
- CI costs
- Task costs
- Custom generated costs - these are not covered in the demo data, refer to the ExpenseLine API for more information.

CI Rate Cards

A CI rate card is a template that defines costs for a particular type of CI. This example uses only server-related costs. Since there are only a few different server models and the costs are the same for each model, CI rate cards can define a template of costs for each model.

Following is the Sun E20K Servers NY rate card:

Cost Demo CI Rate card



It represents the common costs and CIs in the UNIX servers in the NY datacenter, regardless of what the server is used for.

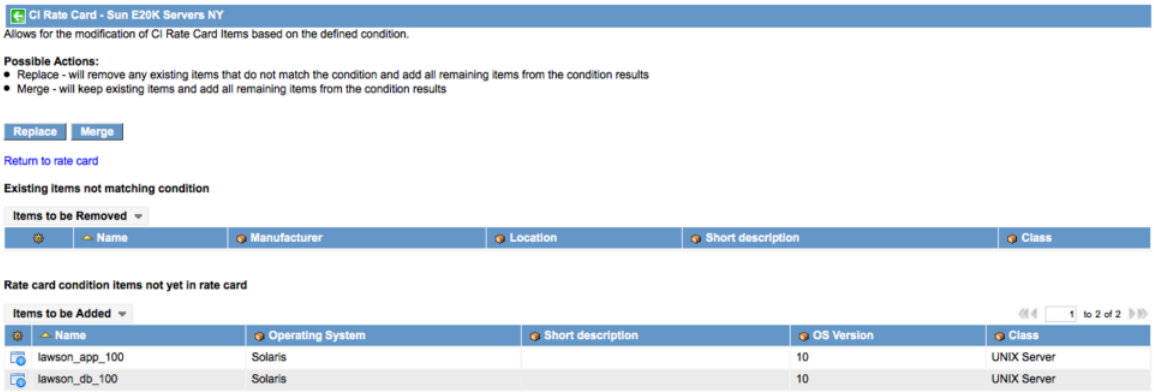
The related lists contain information on how this rate card is used. The **Configuration Items** related list display the each of the servers that will use this rate card. This list of items can be managed manually with the **Edit** button or with the **Update CI List** related link. The rate card condition for this rate card is **Table=Unix Server**. Clicking the **Update CI List** related link shows two things:

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- CIs that are a member of the rate card but do not match the condition.
- CIs that match the condition but are not a member of the rate card.

To "true-up" the rate card, use the **Replace** or **Merge** button.

Cost Demo update CI rate card



In this case, there are two extra UNIX servers that are not in the rate card. Use the **Merge** button to add them. The rate card now shows nine items.

Note:
Counts may vary if there are additional CIs in the instance.

The **Rate Card Costs** related list displays the recurring costs that all of the servers will incur, in this case on a monthly basis.

Adding the **Expense Line** related list to the CI Rate Card form shows the list of expense lines that have been generated from this rate card's costs. Here are the expenses for the Server backup services for two of the servers:

Cost Demo CI Rate Card

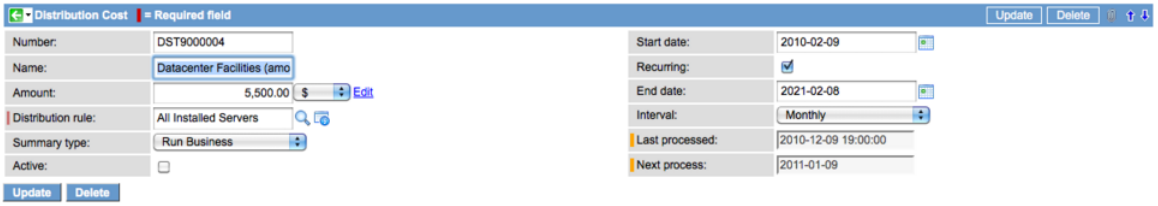


Distribution Costs

For more generic bulk costs that are generated by multiple CIs, distribution costs can represent the broader costs where individual CI rate cards do not apply. Navigate to **Financial Management** > **Distribution Costs** to view a few examples.

Select **Datacenter Facilities (amort)** from the list:

Cost Demo distribution cost

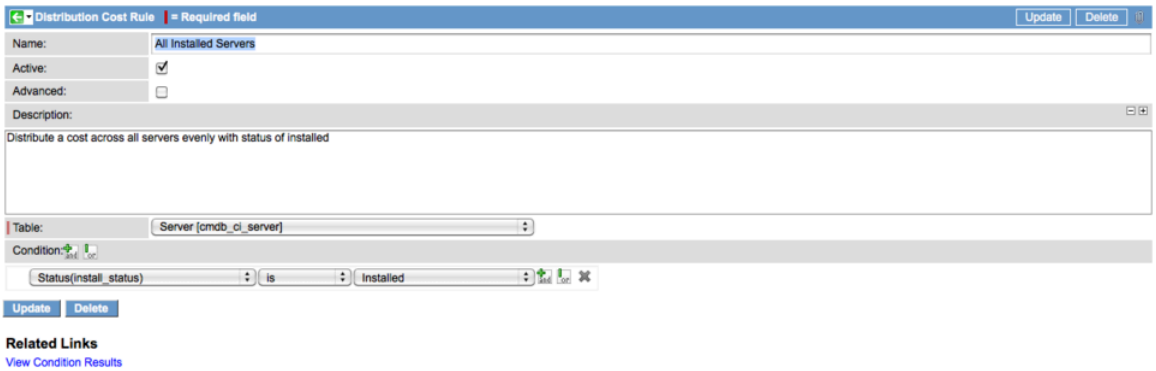


In this example, the datacenter's power costs for a month have been amortized and represented as a monthly recurring distribution cost.

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This bulk cost should be distributed to all servers evenly to enable reporting on costs per server and cost center. This is accomplished with the **Distribution Rule** listed on the cost's form. To view the distribution cost, click the reference icon for the **All Installed Servers** rule in the **Distribution rule** field:

Cost Demo Distribution cost rule



This rule takes the $5,500 and distributes it to each of the servers that match the rule condition. The condition here is All servers with install status of installed. The '"View Condition Results related link displays the current records matching the condition.

Task Costs

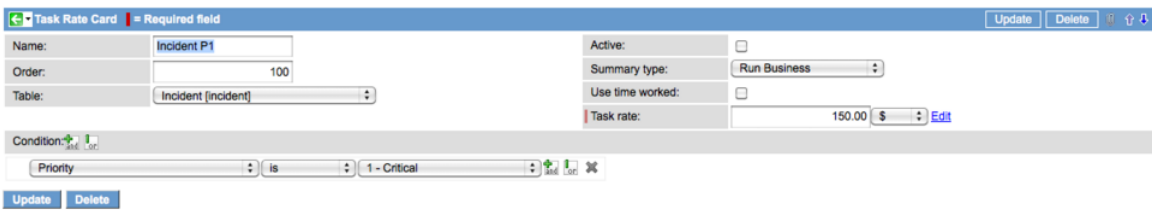
Task-related activity can also generate expense lines to track the costs associated with processing tasks. The primary method of generating task-related costs is to use **Task Rate Cards**.

Task Rate Cards

A task rate card is a condition-based record that the system uses to determine how to calculate the costs of a task.

To view an example, navigate to **Financial Management** > **Task Rate Card** and select **Incident P1**:

Cost Demo Incident rate card



Rate cards are processed whenever a task is closed. This processing is triggered by a business rule. The rate card contains the following information:

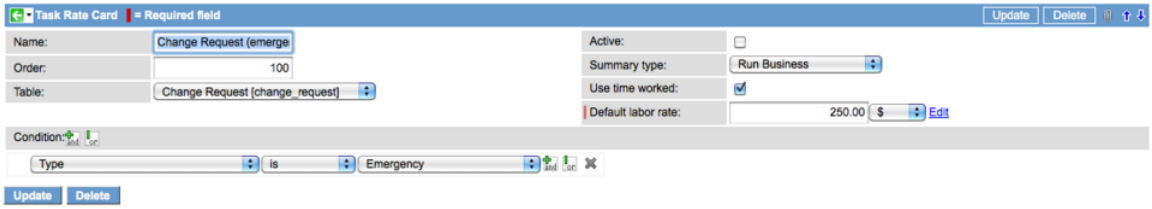
- When an incident with priority **1 - Critical** is closed, it generates an expense line for $150.
- This is a flat rate defined for each P1 incident.

The **Expense Line** related list displays the list of expenses that have been created by this rate card.

Return to the **Task Rate Card** list and open the **Change Request (emergency)** rate card:

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Cost Demo Change Request



This rate card for emergency change requests demonstrates an example of creating a task cost based on the amount of time it took to work the task, instead of the flat rate model in the incident rate card.

- The **Use time worked** flag in the rate card tells the system to use the task time worked records associated with the task when determining the task cost.
- Processing this rate will:
  - Query the list of task time worked records for the task.
  - Attempt to resolve an hourly rate for the user in the task time worked record, or use the default rate of $250/hr defined in the rate card.
  - Generate an expense line for each time worked entry.

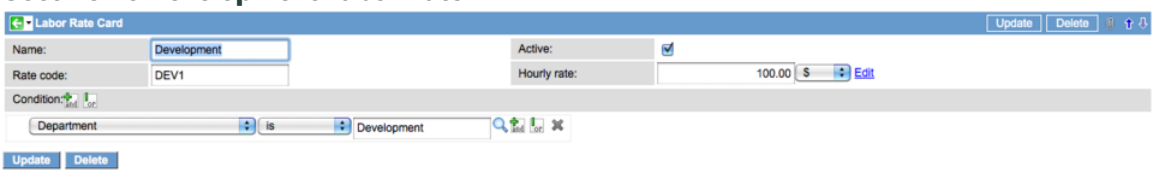
The **Expense Lines** related list shows the expenses generated from this rate card.

Labor Rate Cards

Labor rate cards are a way to define common patterns for hourly worker rates so rates don't need to be managed for each individual in the system.

To view the sample rates, navigate to **Financial Management** > **Labor Rate Cards** and select the **Development** rate card:

Cost Demo Development Labor Rate



The conditions state that for users in the **Development** department, time worked costs will use $100 as the hourly rate.

CI relationships

To get reports that represent the total costs for a business service, there must be some association between the service and the CIs that make up the service. This is done with CI relationships.

Before you begin

Role required: financial_mgmt_admin

About this task

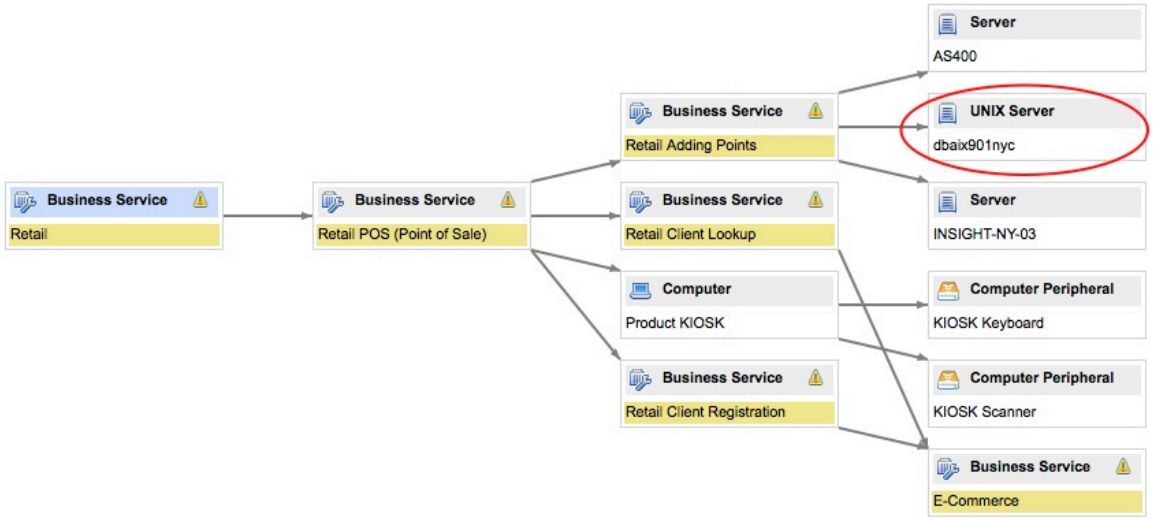
Use the demo data of the Cost Management plugin to understand how to check all expense lines related to a business service.

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Procedure

1. Navigate to **All** > **Cost** > **Config** > **Business Services**.
2. Select **Retail**.
3. View the business service map by selecting the dependency views icon ( ).

Example business service map



This view shows that the dbaix901nyc server is a dependency of the Retail Adding Points, Retail POS, and Retail business services. So whenever the dbaix901nyc server incurs a cost, it would be represented at each of the business services.

The dbaix901nyc server is a member of the Sun E20K Servers NY CI rate card, so the expenses can be verified from this CI rate card.

To view them:

a. Navigate to **All** > **Cost** > **Costs** > **CI Rate Cards**.

b. Select **Sun E20K Servers NY**.

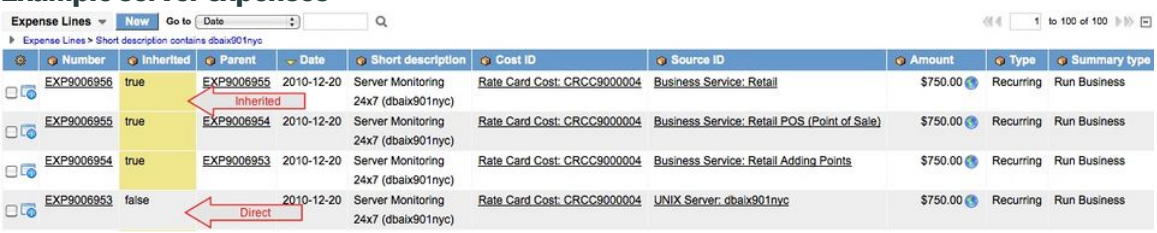
c. Select the Expense Line related list.

   If this related list is not available, configure your form layout to display the Expense Line → Rate Card related list.

d. Filter the related list for **short description contains dbaix901nyc**.

The server's expenses are now visible:

Example server expenses


Expense Lines | New | Go to Date | 1 to 100 of 100

Expense Lines > Short description contains dbaix901nyc

Number	Inherited	Parent	Date	Short description	Cost ID	Source ID	Amount	Type	Summary type
EXP9006956	true	EXP9006955 (Inherited)	2010-12-20	Server Monitoring 24x7 (dbaix901nyc)	Rate Card Cost: CRCC9000004	Business Service: Retail	$750.00	Recurring	Run Business
EXP9006955	true	EXP9006954	2010-12-20	Server Monitoring 24x7 (dbaix901nyc)	Rate Card Cost: CRCC9000004	Business Service: Retail POS (Point of Sale)	$750.00	Recurring	Run Business
EXP9006954	true	EXP9006953	2010-12-20	Server Monitoring 24x7 (dbaix901nyc)	Rate Card Cost: CRCC9000004	Business Service: Retail Adding Points	$750.00	Recurring	Run Business
EXP9006953	false	(Direct)	2010-12-20	Server Monitoring 24x7 (dbaix901nyc)	Rate Card Cost: CRCC9000004	UNIX Server: dbaix901nyc	$750.00	Recurring	Run Business

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This example contains one direct expense (**inherited = false**), and three inherited expenses that have been generated from other direct expenses. These inherited expenses are based on CI relationships, which allow for reporting at any business service level.

For more information on expense aggregation, see Enable relationship aggregation.

Allocating expenses

Expenses can also be allocated to a business entity that is responsible for the expense.

This is not considered charge-back or billing but could be used as a source for billing. The primary purpose of expense allocation is to represent the consumer of the process that has incurred some expense. This can be accomplished by defining expense allocation rules.

Simple Example

This example demonstrates allocating every server-related expense line to the department responsible for the server.

To view the example:

1. Navigate to **Financial Management** > **Expense Allocation Rules**.
2. Remove the list filter to view inactive rules as well as active ones.
3. Select the **Server - Department** rule.

The rule states that for every expense line associated (**Expense source** field) with a server that has one of the selected statuses, generate an expense location record for 100% of the expense amount and assign the allocation to the server's department.

To view expense allocations, add the **Expense Allocation** related list to the form. The **Target** field is the business unit that the expense is allocated to.

Cost Demo Alloc Exp

Expense Allocations Go to Number 1 to 44 of 44

Allocation rule = Server - Department

Number	Date	Month	Target	Short description	Amount	Expense line
EXPA9004601	2010-02-09	2009-12	Department: Sales	Server monthly lease (SAP LoadBal01)	$8,500.00	EXP9008842
EXPA9004612	2010-03-12	2010-01	Department: Sales	Server monthly lease (SAP LoadBal01)	$8,500.00	EXP9008872
EXPA9004628	2010-04-09	2010-02	Department: Sales	Server monthly lease (SAP LoadBal01)	$8,500.00	EXP9008902
EXPA9004634	2010-05-10	2010-03	Department: Sales	Server monthly lease (SAP LoadBal01)	$8,500.00	EXP9008932
EXPA9004650	2010-06-09	2010-04	Department: Sales	Server monthly lease (SAP LoadBal01)	$8,500.00	EXP9008962

Complex Example

A more common example would be to allocate the costs of a business service to the business consumers. Since cost centers are generally used when referring to business finances, this example allocates business service costs to each cost center that is consuming the service and bases the amount allocated on the amount of the service the cost center consumes.

To view the example, navigate to **Financial Management** > **Business Services** and select **Retail.** Switch to the **Cost** view to gain access to additional related lists.

The **Allocation Units** record defines the amount of capacity that this service provides. In this case, the Retail service can support 50 locations (units), of which 45 are allocated. A unit is a generic concept that can represent something that makes sense for that business service. This record uses units to represent allocation. The objective is to use the unit count and the cost center unit count to determine a percentage of total to calculate the allocation amount.

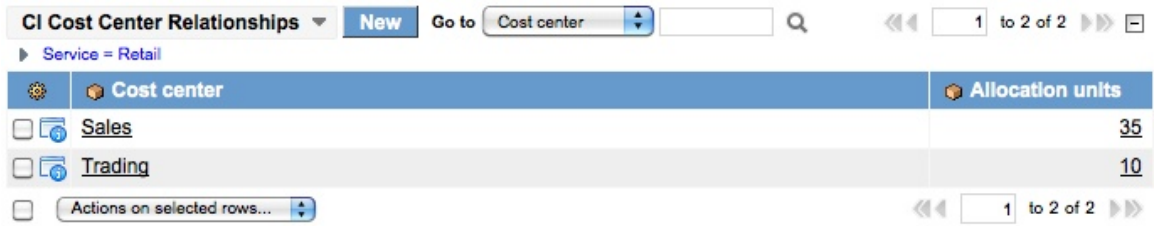
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Cost Demo Retail Allocation Units



The CI Cost Center Relationships list shows which cost centers are using the service and how many units they are using. This information is used to determine how much of the service expenses to allocate to each cost center. For example, the Trading department is using 10 of the 50 allocated units, so they will be allocated 20% of all Retail expenses. There's also an option to allocate based on the total (10 or 45).

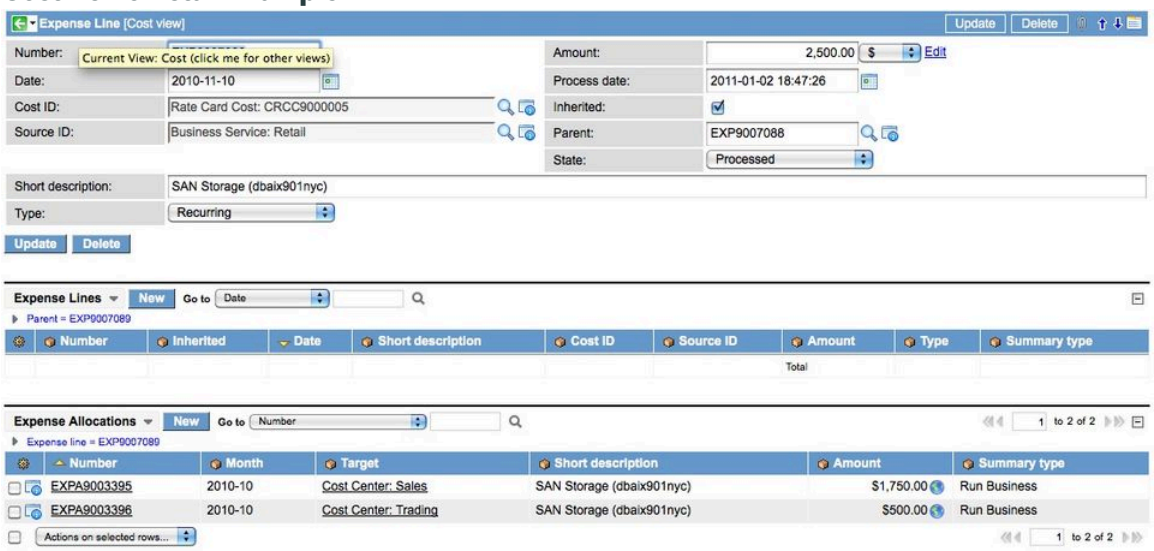
Cost Demo Retail Users



To see how the expense lines are allocated, select an entry in the **Expense Lines** related list and add the **Expense Allocation** related list to the Expense Line form.

The following is an expense from the dbaix901nyc server for $2,500. Two expense allocations are generated from the expense. The **Trading** cost center was allocated $500 (20%) of the expense based on the CI cost center relationship seen earlier.

Cost Demo Retail Example



This type of business-service-to-cost-center allocation is accomplished through the **Process Svc-CC Relationships** expense allocation rule. This is an advanced rule that uses script to determine the allocation logic.

Budget related records

Budgets are related to additional records, displayed as related lists on its form.

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The following are the related lists on a Budget record. You can add additional records to these related lists or remove existing ones.

- Cost Centers: Shows the cost centers that are a member of this budget.
- Expense Allocations: Shows all of the expense allocation records during the budget time period for all of the budget's cost centers.

Domain separation and Cost Management

Domain separation is unsupported in Cost Management. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: No support

- The domain field may exist on data tables but there is no business logic to manage the data.
- This level is not considered domain-separated.

For more information on support levels, see Application support for domain separation.

Related topics

Domain separation for service providers

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