rego consulting

Let Rego Be Your Guide

ServiceNow IT Business Management Release Updates

Paris

Foundation Menu

Rego Offers Release Updates to Enhance the Platform

What's Included

ServiceNow PPM Release Updates and Training Materials

ITBM Foundation	Over 100 Training Assets Supporting the Latest Functionality	Latest Release Updates	Ad-Hoc Support (30 Hours)

- ITBM Search Alignment
- Resource & Cost Plan Improvements
- Demand Form Updates
- Risks, Issues, & Requirements
- Status Report Enhancements
- Auto-filter Resource Roles
- Project Task Enhancements
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ITBM Foundation Menu

Training Material Provided

Title	Description (Parameters & Acceptance Criteria)	New York	Orlando	Paris
ITBM Search Alignment	❏ Search for Ideas, Demands, and Projects with a standard search box. Find records quickly and leverage out-of-the-box search functionality.	X		
Resource & Cost Plan Improvements	❏ Pick up Demand and/or Project Dates, and automatically default the dates within a new Cost Plan and/or Benefit Plan. ❏ Default to the current year within the fiscal period lookups of Cost Plans and Benefit Plans. Note that Cost Plans and Expense Lines will only pull data from their parent. However, a Cost Plan can be linked to a Resource Plan when the Cost Type is Labor. This new functionality ensures that users employing Resource Plan lookup through the Cost Plan only see Resource Plans associated with the same parent as the Cost Plan. ❏ Expense Lines include the same functionality, where the user is associating a Cost Plan. ❏ Cost Plans created from a Resource Plan now default to Labor OpEx.	X		
Demand Form Updates	❏ Require start date and completion date entry prior to entering a Screening State to ensure proper investment prioritization. ❏ Display the “Create Project (Enhancement/Change/Defect)” related link only when a Demand is in Approved state. Relabel Demand dates to clearly align with common terminology.	X		
Risks, Issues, & Requirements	❏ Issues can be associated to a Project Task. ❏ Project will show both Project level and Project Task level Issues. ❏ Title and description fields are required on Project Change Requests. ❏ Technical and process details can be captured in a new tabbed section on Requirements.	X		
Status Report Enhancements	❏ Track baseline start and end date to status report ❏ Make comments mandatory if status is Red	X		
Project Task Enhancements	❏ Users cannot delete a project task with actual time booked on the task. ❏ Track CAPEX tasks with a new task field.	X		
Open for Time at Task Level	❏ Allow Project Managers to control projects and tasks users can track time to with a new field on the project task form: “Open for Time Recording.” When Open for Time Recording is checked, time can be recorded against a task. When unchecked, the task will not be displayed in the Timesheet Portal’s task list, task lookup, or Timecard form. A project field can be used to disperse the same functionality across all tasks.	X		
Email Button for Task Assignments	❏ Project Managers can click a new button on the project header to immediately notify named resources assigned to a project task of changes to their tasks and assignments. Email notifications are consolidated per user to ensure team members are always aware of the latest updates.	X		

Training Material Provided

Title	Description (Parameters & Acceptance Criteria)	New York	Orlando	Paris
PPM Notifications	❏ Resource Manager is notified when a group Resource Plan is Requested. User Manager is notified when a user Resource Plan is Requested. ❏ Project/Demand Manager is notified when a Resource Plan is Confirmed, Allocated, or Rejected. ❏ Notifications are sent to interested parties under the following scenarios: • Notification is sent to the Sponsor & Requester when a Demand is created from an Idea • Notification is sent to the Demand Manager, Requester, and Project Manager when a Project is created from a Demand • Notification is sent to Project Manager when assigned to a Project • Notification is sent to Resources when assigned to RIDAC tasks, using the Assigned To field on a Risk, Issue, Project Change Request, Action, or Decision	X		
Auto-filter Resource Roles	❏ When creating a new Role-type Resource Plan, Role can be used alone or filtered based on the chosen Group. If no Group is chosen, all Roles will be available for selection.	X		
Agile	❏ Developer – Tester ❏ Auto-generate Release Notes ❏ Best Practices KB Articles ❏ Defect and Story Enhancement ❏ SCRUM Process Improvement	X		
Project Status Form with Help Text	❏ The Project Status Form with HTML Text release updates adds HTML help text to the Project Status Report form, providing users guidance and criteria for selecting the appropriate status indicator color for each section.		X	X
Project Summary Dashboard	❏ The Project Summary Dashboard has been modified to show more data for project managers and others. The Dashboard consists of various tabs and metrics to give a high-level overview of all projects. ❏ Each tab gives you the ability to filter the dashboard based upon various filters. When the filters are applied it will update all the widgets on the page with that filter criteria. Available for: Projects, Issues, Risks, Status Reporting, Project Change Request		X	X
Project Template with Resource Plans	❏ The Project Template with Resource Plans release update provides users the ability to create project templates that capture and include Resource Plans. This allows organizations to automatically create Resource Plans when a template is applied to a Project.		X	X
Project Template with Risks	❏ The Project Template with Risks release update provides users the ability to create project templates that capture and include Risks. This allows organizations to automatically create standard Risks when a template is applied to a Project.		X	X
Project Charter Export	❏ The Project Charter Export release update provides Project Managers with the ability to export basic project and business case information to a Word document for use as a Project Charter.		X	X

Training Material Provided

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Contractor Capacity	❏ Ensures that the capacity and availability of contract resources is accurately reflected in Resource Management reports and dashboards by setting start/end dates for the resource and having the system show no capacity outside those dates. This will enable RMs to easily see reduction in headcount due to contracts ending and be able to plan accordingly when allocating contract resources to projects.		X	X
Go-Live Milestone Enhancements	❏ A Go Live Milestone indicator has been added to the project task. This checkbox only appears when the Key Milestone checkbox is selected. When marked as a Go-Live Milestone, the system will populate the Go-Live date field on a project form, using the latest milestone task date if there are multiple Go-Live Milestones.		X	X
Resource Group Management	❏ Enables self-management of Resource Groups by Resource Managers, eliminating the need for admins to manage on their behalf while putting controls in place to ensure RMs can only create and manage Resource Groups.		X	X
Demand Draft Workflow	❏ This release update implements an approval step to move a Demand from Draft to Submitted. Submitters are now required to use the "Submit for Approval" button, which uses the OOTB approval workflow to create an approval for the Sponsor. The approval will send an email as well as appearing in the My Approvals section for that Sponsor. The Demand will not move to the Submitted state until an approval is received. For Demand Managers, the "Submit Demand" button still displays to that they can bypass the approval workflow.			X

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