

Investment Funding with ServiceNow PPM

COURSE DESCRIPTION

Investment Funding with ServiceNow PPM (Project and Portfolio Management) teaches investment managers how to use ServiceNow's Investment Funding application to request and allocate funds to investments.

AUDIENCE – Portfolio Managers, Financial Managers

COURSE TYPE – Onsite / Online

PREREQUISITES – Basic understanding of ServiceNow Navigation

DURATION – 3 hours

COURSE OUTLINE

Overview

- Investment Funding Overview
- Roles in the Process
- My Investments Portal

Investment Funding Process

- Creating a Top-Level Investment and adding funds
- Creating a child Investment
- Allocating funds to the child investment (top-down)
- Requesting funds from a Funding Entity (bottom-up)
- Entering actual spend on an investment
- Putting a Fund Request on hold