

Portfolio Planning with ServiceNow PPM

COURSE DESCRIPTION

Portfolio Planning in ServiceNow PPM (Project and Portfolio Management) teaches portfolio managers and Finance staff how to use ServiceNow's Portfolio module to support portfolio planning and budgeting within the ServiceNow ITBM application.

AUDIENCE – Portfolio Managers, Finance

COURSE TYPE – Onsite / Online

PREREQUISITES – Basic understanding of ServiceNow navigation

DURATION – 3-4 hours

COURSE OUTLINE

Managing Portfolios

- Accessing Portfolios
- Portfolio Properties
- Five Steps of Portfolio Management

Portfolio Workbench

- Using the Portfolio Planning Workbench
- Portfolio Planning
 1. Setting Targets
 2. Selecting Demands and Projects for the current FY Portfolio
 3. Allocating Budgets
 4. Creating Planning Scenarios
 5. Confirming the current FY Portfolio

Tracking the Portfolio

- Investment Portal

