Creating a Project in ServiceNow - Overview

• Creating a project in ServiceNow begins with creating a Demand.
  – This Demand allows us to keep track of what project needs will be coming in, as well as providing a record of the original scope and vision.

• Some funding processes (notably the IT Capital Review process) require a Demand ahead of proposal submission.
  – This gives the HUIT PMO a clearer sense of funding and timeline issues.
  – It also provides a way for common needs to become apparent early, so that they can be addressed from multiple perspectives.

• Since an approved Demand automatically creates a Project record in ServiceNow, you will be able to move easily from Demand to Project.
Creating a Project in ServiceNow - Process

Create New Demand
• Creates a new record in ServiceNow

Add Relevant Information
• Delivery Org, Funding Source, Start and End Date, and Sponsor are some of the immediately required information.

Move Demand through Workflow
• All fields in the main view and the Assessment Data tab will be required before you can move the project through to Qualified.

Project Approved
• Your organization may have specific rules about how and when projects may be approved.

Project Created
• After approval, a project will automatically be created from the Demand record.
Creating the Demand

1. All Projects begin as a Demand. Click Create New on the Demand menu on the left-hand application navigator.

2. You do not need to fill in all of the fields immediately – the required fields will change depending on workflow stage and type of project.

3. If additional data is required to move to the next workflow stage (see slide 4), then an asterisk will appear to the left of the field name.

4. All required fields are visible below (in the main screen and the Assessment Data tab).

Please be sure the Planned Start Date and Planned End Date are correct. These dates are used on the project record and you will not be able to reset the project Planned Start Date to an earlier date.
Moving the Demand through Workflow

4. The Demand workflow is displayed along the top of the form. You will be moving this through to Qualified.

5. Buttons to proceed to the next workflow stage are just above the Related Links section of the form and also at the top right. The choices change as you move through the workflow.

6. Please move the Demand through to Qualified as soon as possible, but DO NOT approve the Demand until the Project has been scheduled. Also, your organization may have specific rules about when projects may be approved.

7. A Project is automatically created when the Demand is Approved. A link to the Project will appear directly below the Sponsor field on the Demand form.
**Tips**

- After you have approved the Demand and created a project, you can navigate from the Demand form to the Project form by clicking on the information icon to the right of the project number.
  - **Please note:** There is a required field (Describe the Solution) on the project form (in the Additional Info section) that is a required field. If this field is not filled in, you will receive an error message if you try to save the project record.
- A Demand can only be in one Portfolio. Once it has been Approved and a Project has been created, the Project can be added to multiple Portfolios.
  - If a Demand is already in a Portfolio, please do not change the Demand Portfolio unless you have talked to the Demand Portfolio owner.
- There are several fields that were required last year that are no longer required.
  - **Problem Statement** and **Business Value** fields are located on the Notes tab. This information is still being pushed to Project when the Demand is approved and the project is created.
Resources

- Project size definitions: https://pmo.huit.harvard.edu/tiering
- Investment Type definitions: http://pmo.huit.harvard.edu/investment-pyramid
- Vision instructions: https://pmo.huit.harvard.edu/project-vision-slide
- Link to ServiceNow: https://harvard.service-now.com/navpage.do
- Link to QlikView: https://qlik.huit.harvard.edu/qlikview/