



**Georgia
Tech**

CREATING THE NEXT

Creating a Project and Entering Basic Properties

Quick Reference Guide

Creating a Project and Entering Basic Properties

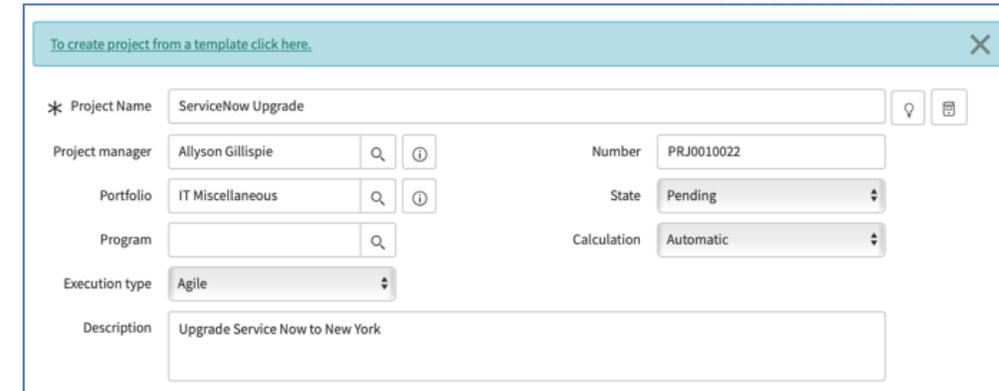
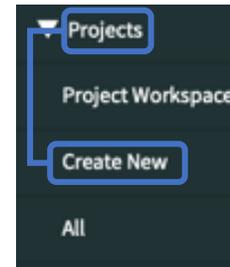
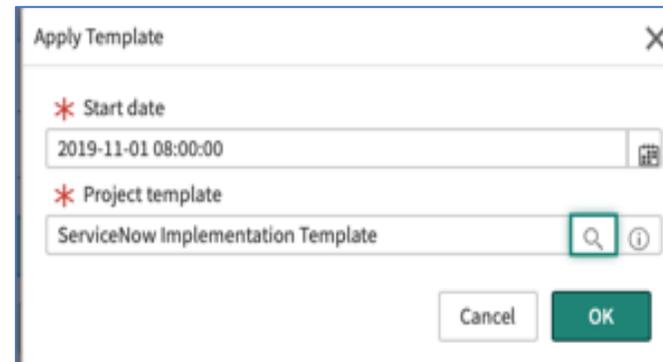
Project Managers can create a project by selecting Projects > **Create New** or by clicking the **New** button on the Project list view page.

You can also create a new Project from the **Project Workspace**.

You also have the option of creating a project from a template. A Project template defines the basic structure of a Project and can include tasks, attachments and other info.

Templates enable you to create, save, and reuse Project structure.

Click the **template link** and select the appropriate template.

A light blue form titled 'To create project from a template click here.' with a close button. It contains several fields: 'Project Name' (ServiceNow Upgrade), 'Project manager' (Allyson Gillispie), 'Portfolio' (IT Miscellaneous), 'Program' (empty), 'Execution type' (Agile), 'Number' (PRJ0010022), 'State' (Pending), and 'Calculation' (Automatic). A 'Description' field at the bottom contains the text 'Upgrade Service Now to New York'.A dialog box titled 'Apply Template' with a close button. It contains two fields: 'Start date' (2019-11-01 08:00:00) and 'Project template' (ServiceNow Implementation Template). There are 'Cancel' and 'OK' buttons at the bottom.

Creating a Project and Entering Basic Properties

Project Key Fields:

1. **Portfolio** – Portfolio that this Project falls under.
2. **Program** – Program related to this Project. Used for reporting.
3. **Investment Class** - Type of investment class category assigned to the demand.
4. **Investment Type** – Investment Type for the Project.
5. **Execution Type** – Waterfall, Agile or Hybrid
6. **Phase** – Phase of the project in relation to the chevrons on top (Initiating, Planning, Executing, Delivering, Closing).
7. **Department** – The Department associated with the Project.
8. **Business Unit** – The Business Unit associated with the Project.
9. **Impacted Business Units** – Business Units that are impacted by the Project.
10. **Business Capabilities** – The Business Capability that is delivered by the Project.
11. **Business Applications** - The Business Application or Platform for the Project. Tied to the APM side of ServiceNow.

The screenshot displays the ServiceNow Project form for a project named "ServiceNow Upgrade". At the top, a progress bar shows the project is in the "Initiating" phase, with other phases (Planning, Executing, Delivering, Closing) shown as chevrons. Below the progress bar, a blue banner reads "To apply template click here." The form fields are organized into two columns. The left column includes: Project Name (ServiceNow Upgrade), Project manager (Allyson Gillispie), Status (Green), Description (Upgrade Service Now to New York), Portfolio (IT Miscellaneous), Program, Investment Class (-- None --), Investment Type (-- None --), and Execution type (Agile). The right column includes: Number (PRJ0010022), Percent complete (0), State (Pending), Priority (4 - Low), Phase (Initiating), Department (Finance), Business Unit (Finance), Impacted Business Units, Business Capabilities, and Business Applications. At the bottom of the form, there are "Save", "Update", and "Delete" buttons. The top navigation bar includes a back arrow, a menu icon, the title "Project ServiceNow Upgrade", and action buttons for "Follow", "Save", "Update", "Delete", and navigation arrows.