Step 2a – Selecting Investments

Quick Reference Guide

Selecting Investments for Execution

The Workflow for Step 2 of the Portfolio Management process is as follows:

Prerequisites

- Step 1 Complete
- Demands/ Projects associated with the Portfolio
- Cost Plans created on the Demands and Projects
- Project dates are within the fiscal year being planned
- Demand is in a **qualified** or **approved** state and have dates within the fiscal year being planned

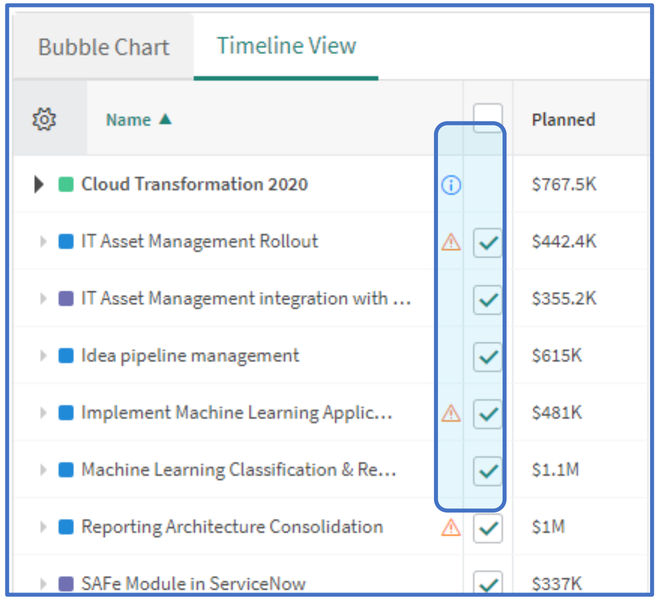
Activities

- Review the Demands and Projects
- Determine the Investments to include by prioritizing, performing what-if analysis and other decisioning methods both inside ServiceNow or externally
- Update Cost Plans as necessary to change Planned Costs
- Mark the included investments by selecting the “Planned” checkbox

Outcomes

- Set of selected Investments for the given portfolio and fiscal year

In this step, select the demands and projects that are to be included in this portfolio budget on the **Timeline View** tab. You can view the planned cost for each project or demand within the fiscal year, along with their priorities. What-If analysis can also be performed to determine the final selection of demands and projects for the portfolio’s fiscal budget by checking and unchecking the boxes next to each investment. Timeline View also allows you select investments, rank by score, rank by visual display (which column you are sorted by) or adjust rank (accepts current numbers in rank column).



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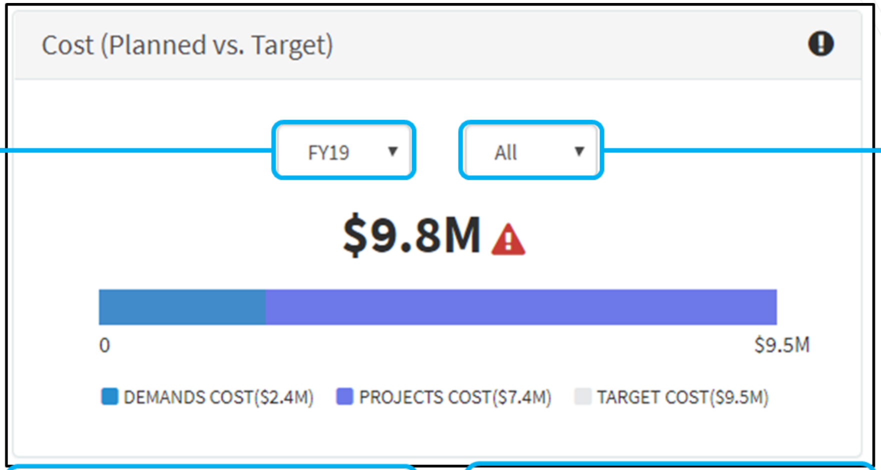
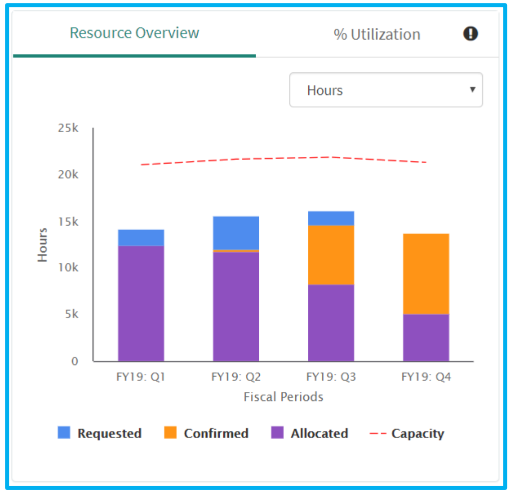
The projects/demands that have been selected affect the Cost and Resource charts on the right of the Portfolio workbench. The **Cost chart** shows Project vs. Demand costs for the selected investments in the Portfolio:



Select the fiscal year drop down (**FY19**) to see planned costs by month.

Select **All** to change cost type to CapEx or OpEx.

The **Resource chart** shows resource allocation and % Utilization hours for the fiscal year:



*Note: The graph does not include Resource Plans in the **Planning** state, which is the state for most Demand Resource Plans and only gives a view to the current demand vs capacity view of resourcing*

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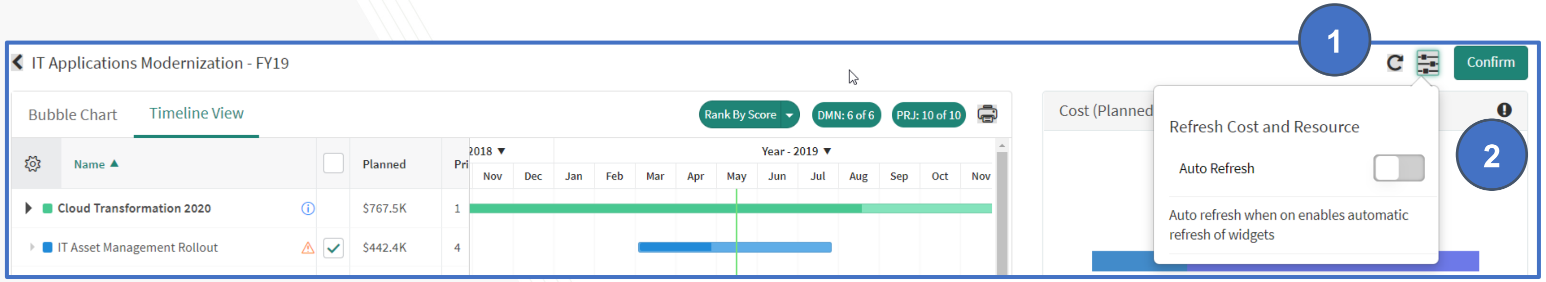

1. Once you have made your selections in the **Timeline View**, click the **Refresh** icon to update the charts on the right side.

2. When selecting Demands and Projects, the exclamation point signifies that Auto Refresh has not been turned on which will automatically recalculate values within the charts and widgets.

3. Review or revise the capex and Opex planned costs for individual projects and demands directly using Planned **Capex** and Planned **Opex** columns in the Timeline View. If these amounts need to be adjusted, the changes will need to occur to the underlying Cost Plans on each Project/ Demand record.

Note: During portfolio planning, if you are taking a *Back Loading* approach, update the targets as you include/ deselect investments from the portfolio. If you are *Front Loading*, simply set the targets and use the charts on the right to ensure you stay within your target parameters.

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As investments are selected and deselected in the Timeline View, they can be viewed on the **Bubble Chart** tab where Demands and Projects are plotted out from a Risk and Value perspective.

Those that have been selected for execution (via the Timeline View tab) appear with a **green border** around the circle.

You may also manually move the bubble around or right-click the bubbles to select the items for execution or view the record.

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