**ITS ServiceNow PPM**  
**Project Intake Form Guide**

**Purpose:**

This document will help you gather information to get your project started and will guide you through the process of sharing this information in PPM. Promoting your Idea as a Demand in ServiceNow PPM is the first step towards moving your request through the Project Management process.

The following information will help the Project Portfolio Management Office (PPMO) to determine if your request is a project and determine the intended objective, scope, and size of your request.

**Directions:**

* **Submit Information as Demand in ServiceNow PPM.** Please submit the following Project Intake Form questions as a Demand in ServiceNow PPM. **Emailed paper forms will not be accepted.**
* **Avoid department jargon.** Please complete these fields without using specific department or business language and acronyms so that a larger audience can understand your request.
* **Keep it simple.** This form is intended to include basic information that you can fill out in about an hour. We have provided examples for your reference. *Don’t worry, you’ll have a chance to provide further information later, when the Project Charter and Business Requirements Document (BRD) will be created.*
* **Be mindful of privacy.** ServiceNow PPM is viewable by everyone with a full ServiceNow license, which means any attachments are also viewable. Please don't attach any information that you wouldn’t want visible to everyone with ServiceNow access.

Below you will find a chart aligning Intake Form Questions with specific fields in ServiceNow PPM. This chart is intended to clarify the fields that must be completed and what information should be included in each required field. You may either:

**A) Fill out the Demand form directly in ServiceNow PPM**

**or**

**B) Fill out the chart below, then copy your answers into the corresponding fields in PPM**

**Step-by-Step:**

1. Log in to ServiceNow PPM at <https://nau.service-now.com/> with your CAS login.
2. Type **Idea** in the **Filter Navigator** and select the idea you want to promote to a Demand.
3. **Accept** the Idea and this promotes the idea to a **Demand Draft**.
4. Complete the minimum required fields below; any fields not listed may be skipped.
   * Please note: If you do not see all of the same fields described below, you may be viewing the Self-Service version of the Demand Draft process.
   * On search bar make sure you are in the **Demand** category and not the Self-Service category.
5. Once fields are completed, hit **save** and then select the button **Submit** **Demand** to send the demand for PPMO review.

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| --- | --- | --- |
| **Where to fill out the PPM Demand Field** | **What to Fill Out/ Question to Answer** | **Example** |
| **Name** | Project Name | Migrate Employee Email (IRIS) to Office 365 Exchange Online |
| **Category** | Always select “Strategic” | Strategic |
| **Type** | Always select “Project” | Project |
| **Start Date** | Planned start date of project | 01/01/2020 |
| **End Date** | Planned end date of project | 04/14/2020 |
| **Details Tab** | | |
| **Portfolio** | Select the primary business unit associated with project | Academic Affairs |
| **Program** | Only select if this is part of a Program (if not sure, leave blank) | NAU Refresh |
| **Demand manager** | SPRRC Rep | Rayma Lee |
| **Business Unit** | Select the primary business unit associated with project | Academic Affairs |
| **Impacted Business Units** | Select Multiple. Please include all business units impacted by project | Academic Affairs, ITS |
| **Business Case Tab** | | |
| **Strategies /Business Case** | Select multiple goals and indicate all objectives met for each goal, if applicable. How does your project advance NAU Strategic Goals? ([See goals here](https://nau.edu/strategic-plan-2025/))  Type in the number and the letter using the guide below:  1. Student Success & Access: Educate students to serve, lead and achieve  a. Increase access to higher education, particularly for AZ students  b. Enhance student learning through high-quality, student-centered educational  experiences  c. Increase the number of students who are retained and graduate  d. Increase enrollment, retention, and graduation of diverse students  2. Research and Discovery: Expand the boundaries of knowledge and creativity  a. Increase nationally and internationally recognized research, scholarship, and creative  endeavors  b. Expand research-based training and learning opportunities for undergraduate students  c. Expand and support innovative, cutting edge research opportunities for graduate  students  d. Increase the application for research findings, discoveries and expertise for the direct  benefit of local, regional, national, and international communities  3. Commitment to Native Americans: Become the nation’s leading university serving Native  Americans  a. Increase enrollment, retention and graduation rates of Native American/Indigenous  students while providing an unparalleled combination of academic and cultural support  b. Recruit and retain more Native American/Indigenous faculty, staff and administrators  c. Collaborate with Native American/Indigenous to develop projects and programs for the  direct benefit of Native American and Indigenous communities  d. Promote appreciation and understanding of native American/Indigenous people,  cultures, and nations within the university and broader community  e. Strengthen the Native American Cultural Center’s role as a primary point of cultural and  educational engagement  4. Engagement: Strengthen university, community, regional, national, and global ties for the  mutually beneficial exchange of knowledge and resources  a. Cultivate a diverse environment where all people are included, valued, and respected  b. Build support for University initiatives with both the public and private sectors  c. Strengthen the university’s contributions to the economic vitality of Arizona  communities and beyond  d. Integrate community engagement into academic curriculum and university policies and  practices  5. Stewardship: Ensure long-term viability of the university  a. Increase the financial stability and strength of the university  b. Reduce the impact of the university through environmentally sustainable practices  c. Engage in continuous improvement practices  d. Recruit, develop, and retain a diverse, high-quality, and motivated workforce  e. Ensure safety is an integral part of the learning and working environment  f. Maintain a physical environment that inspires learning and attracts and retains students,  faculty, and staff | Student Success & Access, Stewardship  Ensure safety…  1 c, d  2 a |
| **Business case** | What is the goal/purpose of the project or change? Please explain in 1-2 sentences.  Who are the sponsors:   * Business Sponsor (ultimately responsible for project success, authority to make decisions for the business needs): * Executive Sponsor (main advocate for project, provides vision and understanding of business need, provide funding, champion for project priority and resourcing):   Is this Discretionary or Non-Discretionary? If Non-Discretionary, please describe your reasons.   * Discretionary: things that do not fall into non-discretionary * Non-discretionary = audit finding, legal ramifications, funding ramifications if timeline is not met, security ramification   At which level of the organization does this project provide benefit? (Select one)   * Institutional level * Divisional level * Unit/localized level   Are there any current systems impacted/involved? (type in entry fields)   * Relevant applications/URLs? * Known technology?   Do you have an estimated total budget or cost?   * Is it approved? * Is it allocated? | This project will continue the ITS strategic goal of migrating on premise services to cloud services. This project also will reinforce a wider use of the Office 365 suite on campus.  Business Sponsor: Brett West  Executive Sponsor: Steve Burrell  Discretionary  Divisional  Current systems impact: new software will need to integrate with Office 365 portal that we currently use  Total budget: 100K implementation, 50K operation per year, funding allocated |
| **Risk of performing** | What are the potential consequences or risks of implementing this change?   * What are the biggest obstacles or issues you anticipate with implementing this project? * Is there a negative expectation that the change will happen and it's not a choice? * How big is the gap between current state and future state? | In order to upgrade the IRIS email boxes this will require that IRIS email boxes are offline for an unknown amount of time. Also, if the user also has access to shared email boxes this could create an issue when they are migrated to exchange online. This project will encounter resistance when the project is being implemented an email boxes are not accessible. There could be crucial emails that are missed during this timeframe. Faculty and staff may perceive this change as a forced technology change. The system currently works and they will need to understand what is in for them. |
| **Risk of not performing** | What might happen if this project is not completed or if this change is not implemented? | The server may not be in warranty and will need to be replaced. |
| **Enablers** | Please describe how this change will impact our customers, end users, and business partners.   * How will the change impact the day-to-day activities of students, faculty, and staff? * What will this project change about the current work, culture, or process? * What behaviors and activities are expected from students, faculty, and staff? * What messages should managers reinforce, regarding the change?   Who is impacted by this project?   * Most and least? * Please list impacted populations (e.g. all staff, students, everyone).   What resources are needed to implement the project? | All campuses where individuals have IRIS email boxes. Most: All staff and students that have IRIS accounts Least: Students who are not student workers on campus  Project will allow users to use the Office 365 application to access their email. This should streamline the way that users access their email on campus.  This project must be completed before the servers are out of warranty.  -Will need SSO identity management resource  -Will need an IT resource to install the WordPress website into one of NAUs servers  -We will need an IT data warehouse person.  -We might need a brand/marketing person to ensure that websites are in-line with NAUs branding. |
| **Barriers** | Please describe any events, projects, changes, or other elements that might impact this change.   * Is this change dependent upon other changes or projects currently in progress? * Are there any activities or projects that impact this timeline? * Why is this change/project happening now? | No (potentially impacted by the MIMs project that is not officially on the project books yet). |

Optional – If you have supporting documentation that will help PPMO assess your project, please attach file to Demand (see paperclip button at top of screen). If documentation is online, please add URL to end of Business Case.

Once fields are completed, hit **save** and then select the button **Submit** **Demand** to send the demand for PPMO review.

Once submitted, your project will be reviewed by the PPMO Scoping Project Manager, who will reach out to you regarding next steps.

Thank you!