

# Order Management Integration with Strategic Portfolio Management

Time: 35 minutes

ServiceNow Telecom, Media, and Technology (TMT)

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## Lab instance credentials

Field	Value
Username	admin
Password	As provided with your lab instance / <b>Magic link</b>

## Lab objectives

You will achieve the following objectives:

- Determine project oversight of an order's order line item.
- Instantiate customer projects or internal projects for customer order fulfillment project oversight.

- 
- Automated updates of project tasks from order task status updates.
  - Uni-directional note and additional comments posted to project and project task from OMT.

## Scenario

Automation is critical to streamlining order fulfillment workflows as digital services become more complex. In this Lab, participants will learn first-hand how Order Management provides the automation and optimization fulfillment teams need to launch services faster. The Lab would also cover the integration of OMT-PPM that allows the synchronization of order line items to project tasks and order tasks to reduce or eliminate manual order tracking of order fulfillment delivery that spans multiple customer sites and comprises many tasks that include complex customer fulfillment plans.

## Personas

- James Smithson, Product Catalog Manager
- Mike Davis, Order Fulfilment Manager
- System Admin

## Section 1 Validate your ServiceNow Instance

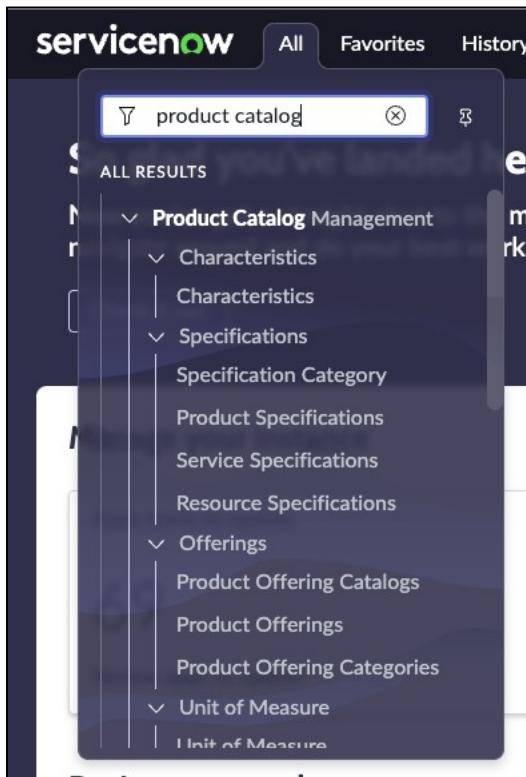
### Section 1.1 Login & Validate

1. Log in to the student lab instance using the **Magic Link** via email.

**Note:** The user is logged in as **Admin**.

2. Click on **All** and type 'Product Catalog.'

**Validate** Product Catalog Management module displays.



3. Click on **Workspaces**,

**Validate:** CSM/FSM Configurable Workspace displays in the List.



**Please flag this if the Product Catalog modules and  
Workspace are unavailable in the assigned instance!**

## Section 2 Product Catalog Modeling

### Section 2.1 Browse the Product Catalog Model

1. Impersonate **James Smithson**, the *Product Catalog Manager*.
  - Select the **System Administrator profile photo** to open the user menu.
  - Select **Impersonate User**.



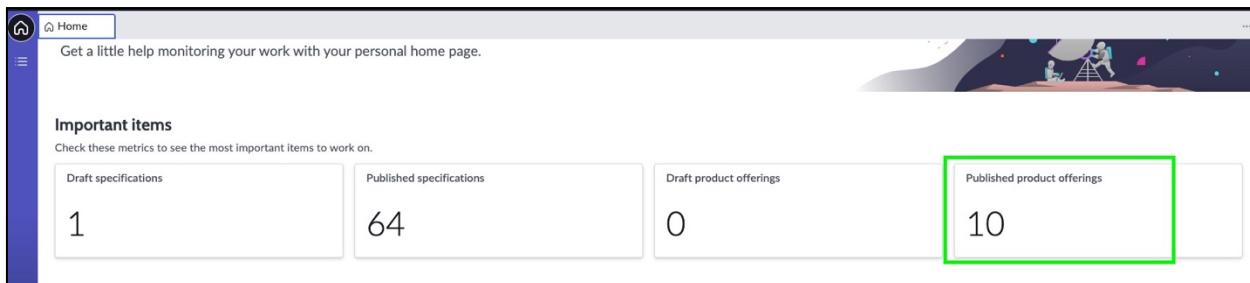
*Caption: Image of the user menu with the Impersonate user highlighted.*

- In the impersonate user dialogue box, search for and select **James Smithson**.
- Select **Impersonate user**.

**Note:** Future lab instructions will state, "Impersonate <User Name>."

2. Navigate to **Workspaces > CSM/FSM Configurable Workspace**.
3. On the landing page, Click on the **Published Product Offerings** widget.

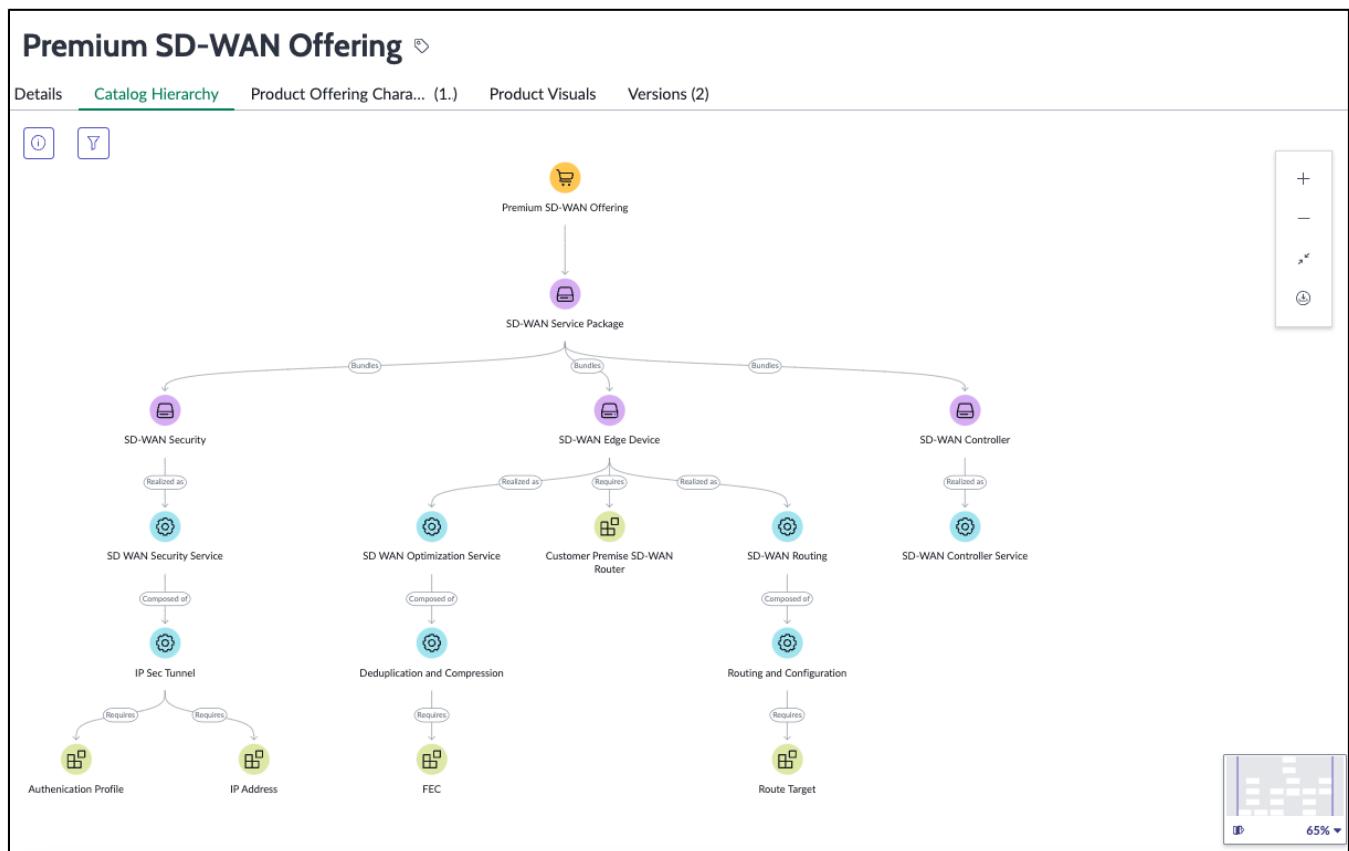
**Note:** The landing page is configurable to display information via widgets



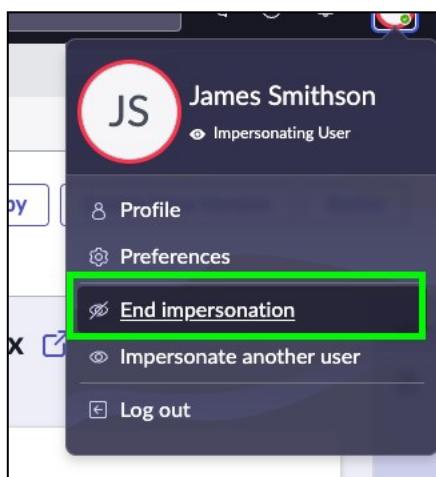
4. From the List, select the PRDOF Number next to the '**Premium SD-WAN Offering**' (DisplayName column)

PRDOF0004	Premium SD-WAN Offering	1	SD-WAN Service Package	£407.6266	£815.2531	12 months	Published
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5. Click on the **Catalog Hierarchy** sub-tab after opening the record.



- a. Click on the **Attachment icon** on the right to minimize the Attachments sub-window to get a bigger canvas. Validate if the below type of Offering is visible.
  
6. End Impersonation as James Smithson and select **End Impersonation** as shown below.



## Section 3 Design time OMT-PPM Configuration

*The design time activities are needed below as part of the OMT-PPM integration.*

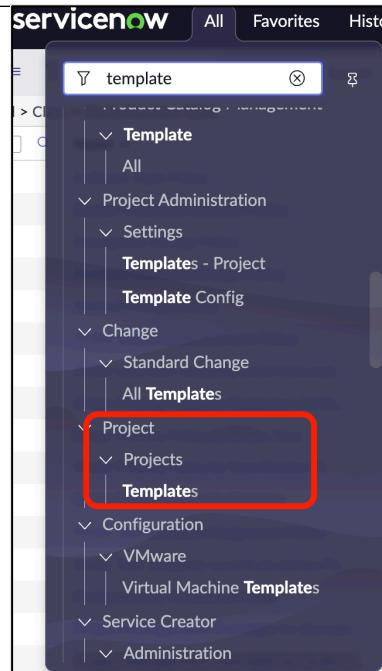
1. Project templates & corresponding task types should be created in Project Portfolio Management.
2. Configure the following decision tables:
  - a. Project Management Oversight for Order Line Item
  - b. Project Management Oversight for Domain Order
  - c. Project Management Oversight for Order Task

**Note:** *The decision tables and subflows are pre-configured with the OMT and PPM integrations.*

### Section 3.1 Project template for SD-WAN

*A sample project template is available for customer project and service portfolio management as part of our OMT-PPM integration.*

1. On Filter Navigator, type **Templates**, and under the Project module, click **Templates**.



2. Please verify if we have two project templates available; this will be instantiated when the Project and its respective tasks are created.

All > Class = Project Template		
<input type="checkbox"/>	Number ▲	Name
Description		
	TPL01001	SD-WAN Customer Product Bundle
	TPL01002	SD-WAN Package

**Note:** There is one template for the Customer project and another for the PPM standard

#### a. Customer Project template

### b. PPM project template

- c. Further, if we open any of these project template tasks, it will have further child project template tasks associated.

The screenshot shows the ServiceNow Project Management interface. At the top, there's a header for 'Project Template Task' and 'Product Order for SD-WAN Service Package'. Below this, there are fields for 'Name' (Product Order for SD-WAN Service Package), 'Table' (Project Task [pm\_project\_task]), 'Project Template' (SD-WAN Package), 'Parent Template' (empty), 'Link element' (Parent), and 'Active' (checked). A 'Data' section contains several dropdowns and input fields: 'Template' (Allow dates outside schedule, false), 'Key milestone' (false), 'Milestone' (false), 'Short description' (Product Order for SD-WAN Service Package), and a 'choose field' dropdown. At the bottom of this section are 'Update' and 'Delete' buttons.

Below the main form is a table titled 'Project Template Tasks' with the following data:

Number	Name	Table
TSKTPLO1012	Product Order for SD-WAN Security	Project Task [pm_project_task]
TSKTPLO1013	Perform Order Validation	Project Task [pm_project_task]
TSKTPLO1014	Service Order for SD-WAN Routing	Project Task [pm_project_task]
TSKTPLO1016	Complete SD-WAN delivery	Project Task [pm_project_task]

## Section 3.2 Decision Tables for Project Management Oversight for Order Line Item

1. The decision tables are used in the run time when the order line item, domain orders, and order tasks are created so which template to be associated with the given order line-item specification is determined using decision tables.
2. Continue the following steps as **System Admin**.
3. Navigate to **System Definition >Decision Tables**.
4. Click on **Project Management Oversight for Order Line Item**.

Project Management Oversight for Order Line Item

Created: 2023-01-23 18:47:33 | Application: Order Management for Telecom, Media & Tech | Properties | Close | Save

**Inputs** [Add](#)

Label	Type	Reference	Mandatory
Order Line Item	Reference	Order Line Item [sn_ind_tmt_orm_order_line_item]	<input checked="" type="checkbox"/> <a href="#">Add condition column</a> <a href="#">⋮</a>
<a href="#">Add an input</a>			

**Decision table** [Export](#) | [Import](#) | [History](#)

**Results**

Action	Specification	Account	Location	Offering	Project Te...
Add	SD-WAN Service Package	Funco Intl	3000 Main Street, Santa Clara, CA	Premium SD-WAN Offering	SD-WAN Package
Change	SD-WAN Service Package v2	Funco Intl	3000 Main Street, Santa Clara, CA	Premium SD-WAN Offering v2	SD-WAN Customer Product Bundle
<a href="#">Default result</a> <a href="#">⋮</a>					

**Note:** There are two templates associated with the product specification.

5. Go back to the **Decision Tables** and see the similar decision tables for **Project Management Oversight for Domain Order**. We will find that for our specification SD-WAN Service Package and its child specifications, there is a mapped project template task available. There will be a domain order on each one of these specifications.

Project Management Oversight for Domain Order

Created: 2023-03-15 18:05:16 | Application: Order Management for Telecom, Media & Tech | Properties | Close | Save

**Inputs** [Add](#)

Label	Type	Reference	Mandatory
Domain Order	Reference	Domain Order [sn_ind_tmt_orm_domain_order]	<input checked="" type="checkbox"/> <a href="#">Add condition column</a> <a href="#">⋮</a>
<a href="#">Add an input</a>			

**Decision table** [Export](#) | [Import](#) | [History](#)

**Conditions**

Action	Specification	Project Template Task
1 Add	SD-WAN Service Package	Product Order for SD-WAN Service Package
2 Add	SD-WAN Controller	Product Order for SD-WAN Controller
3 Add	SD-WAN Security	Product Order for SD-WAN Security
4 Add	SD-WAN Edge Device	Product Order for SD-WAN Edge Device
<a href="#">Default result</a> <a href="#">⋮</a>		

[Add new decision row](#) [Show more](#)

6. Check the Decision Table for **Project Management Oversight for Order Task** below, and we will observe the project template task mapping for each order task created during order fulfillment.

The screenshot shows the 'Project Management Oversight for Order Task' configuration page. At the top, there are tabs for 'Inputs', 'Decision table', and 'Results'. The 'Inputs' tab shows a single input named 'Order Task' with a reference type. The 'Decision table' tab displays a table mapping 'Order Task' steps to 'Project Template Task' steps. The 'Results' tab is currently empty.

Condition	Type	Result
1	Perform Order Validation	Perform Order Validation
2	Reserve Resource	Reserve Resource
3	LLD Signoff	LLD Signoff
4	Allocate and Assign License	Allocate and Assign Licence
5	Allocate and Assign CPE	Allocate and Assign CPE
6	Prepare Security Configuration	Prepare Security Configuration
7	Complete SD-WAN delivery	Complete SD-WAN delivery
Default result		

### Section 3.3 Validate CSM Table Map

CSM table map is used as a one-time synchronization for the attributes from order line item to customer project and PPM project, order task to customer project task, project task

1. Continue as **System Admin**.
2. On Filter Navigator, type **csm\_table\_map.LIST** and open.
3. Search with the mapping name that contains **Order**.

The screenshot shows the 'csm\_table\_map.LIST' filter navigator. It lists various table mappings under the 'Mapping Name' column, such as 'Order Line Item to Customer Project', 'Order Task to Customer Project Task', etc. Each row includes columns for 'Source Table', 'Target Table', 'Active', and 'Order'.

Mapping Name	Source Table	Target Table	Active	Order
*Order	Search	Search	Search	Search
Order Line Item to Customer Project	Order Line Item [sn_ind_tmt_orm_order_line_item]	Customer Project [customer_project]	true	100
Order Line Item to Project	Order Line Item [sn_ind_tmt_orm_order_line_item]	Project [pm_project]	true	100
Order Task to Customer Project Task	Order Task [sn_ind_tmt_orm_order_task]	Customer Project Task [customer_project_task]	true	100
Order Task to Project Task	Order Task [sn_ind_tmt_orm_order_task]	Project Task [pm_project_task]	true	100
Domain Order to Project Task	Domain Order [sn_ind_tmt_orm_domain_order]	Project Task [pm_project_task]	true	100
Order Task to Work Order	Order Task [sn_ind_tmt_orm_order_task]	Work Order [wm_order]	true	100
Domain Order to Work Order	Domain Order [sn_ind_tmt_orm_domain_order]	Work Order [wm_order]	true	100
Domain Order to Customer Project Task	Domain Order [sn_ind_tmt_orm_domain_order]	Customer Project Task [customer_project_task]	true	100

**4.** Open the below records in the CSM table map.

**a. Open Order Line Item to Project record.**

Source Field	Target Field	Active	Order
specification.name	short_description	true	100

**Note:** The source table is order line item, and the target table is Project.  
Order line-item specification name is mapped to a Short description of the Project task.

**b. Open Domain Order to Project Task record.**

Source Field	Target Field	Active	Order
short_description	short_description	true	100

**Note:** The source table is Domain Order , and the target table is Project Task.

Short Description is mapped to a Short description of the Project task.

c. Open Order Task to Project Task record

The screenshot shows the 'CSM Table Map' interface for the 'Order Task to Project Task' mapping. At the top, it displays the mapping name 'Order Task to Project Task', API name 'sn.ind.tmt.orm.order\_task\_to\_project\_task', source table 'Order Task [sn.ind.tmt.orm.order\_task]', target table 'Project Task [pm.project\_task]', application 'Order Management for Telecom, Media & Tech', and an active status. Below this, there's a 'Condition' section with a condition entry for 'short\_description'. Under 'Related Links', there's a 'Run Point Scan' link. The main area shows a 'Basic Field Mapping' table:

Basic Field Mapping		Order	Actions on selected rows...
Table Map = Order Task to Project Task			
<input type="checkbox"/>	Source Field	Target Field	Active
	short_description	short_description	true

At the bottom right of the table, there are navigation buttons: « «, «, 1 to 1 of 1, », » ».

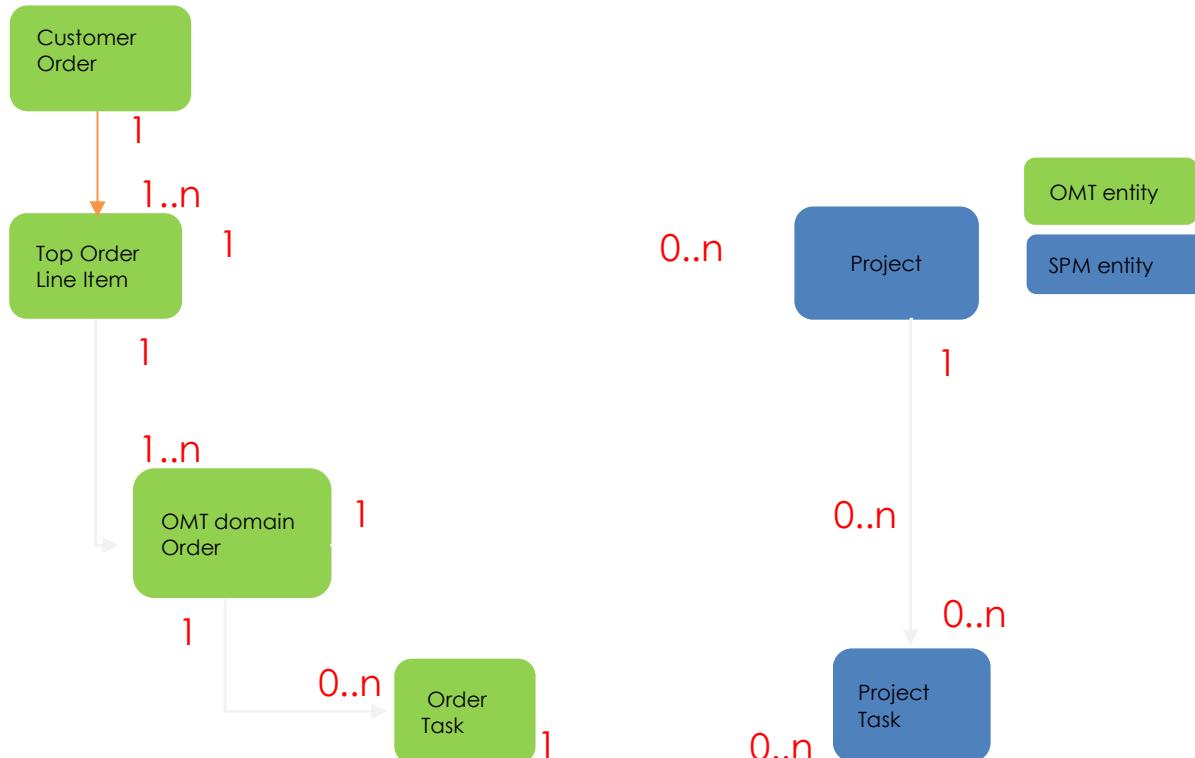
**Note:** The source table is Order Task, and the target table is Project Task. Short Description is mapped to a Short description of the Project task.

## Section 4 Order orchestration flow

Once the above configurations are validated, we will proceed with the order creation. Typically, the flow between OMT-PPM integration is like the one below.

**Note:** The OMT-PPM integration also works with staggered decomposition, inflight changes, and if the quantity > 1.

1. After order approval, top order line items that satisfy conditions in the '**Project Management Oversight for Order Line Item**' Decision Table defined above ([section 3.2](#)) instantiate projects.
2. On creation of a domain order or order task, if eligible as per '**Project Management Oversight for Domain Order**' and '**Project Management Oversight for Order Task**' Decision Tables defined above([section 3.2](#)), the domain order or order task is linked to the project task(s)
3. Order Task Relationships hold the relationship between the order line and customer projects.
4. The below picture depicts how the Order Line Item to Project is linked to each other; there could be 1 to many Projects that can be linked with a single top line item.
5. Domain Orders are linked to Project Tasks and that can be one Domain Order can be linked to multiple Project Tasks.





## Section 5 Submit an Order

So far, the Lab sections have focused on Design time activity. This section will use all the configuration to submit an Order requesting an SD-WAN Service Package activation.

**Note:** In this Lab, students will use the Workspace portal to submit an Order. ServiceNow Order Management also supports Open APIs (TMF622 & TMF641) to submit orders.

### Section 5.1 Submit an Order from Workspace

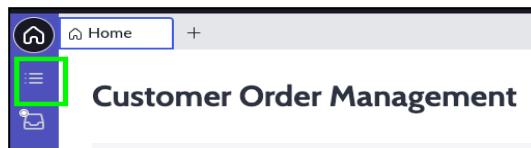
1. **Navigate** to the previous browser tab where the ServiceNow instance homepage is open.

1. Impersonate **Mike Davis**, the *Fulfilment Manager*.

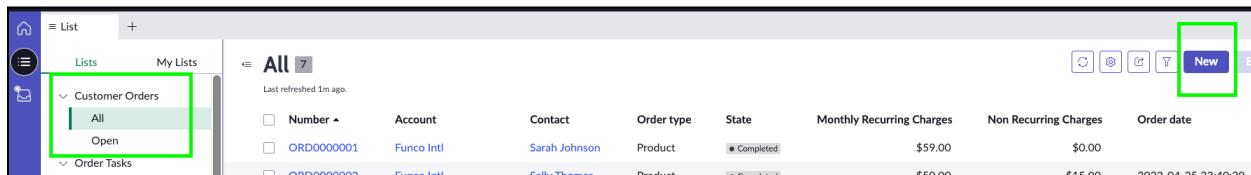
**Note:** As a Fulfilment Manager, Mike is responsible for reviewing, approving, and processing Orders and their related Order Tasks.

2. Navigate to All > CSM/FSM Configurable Workspace.

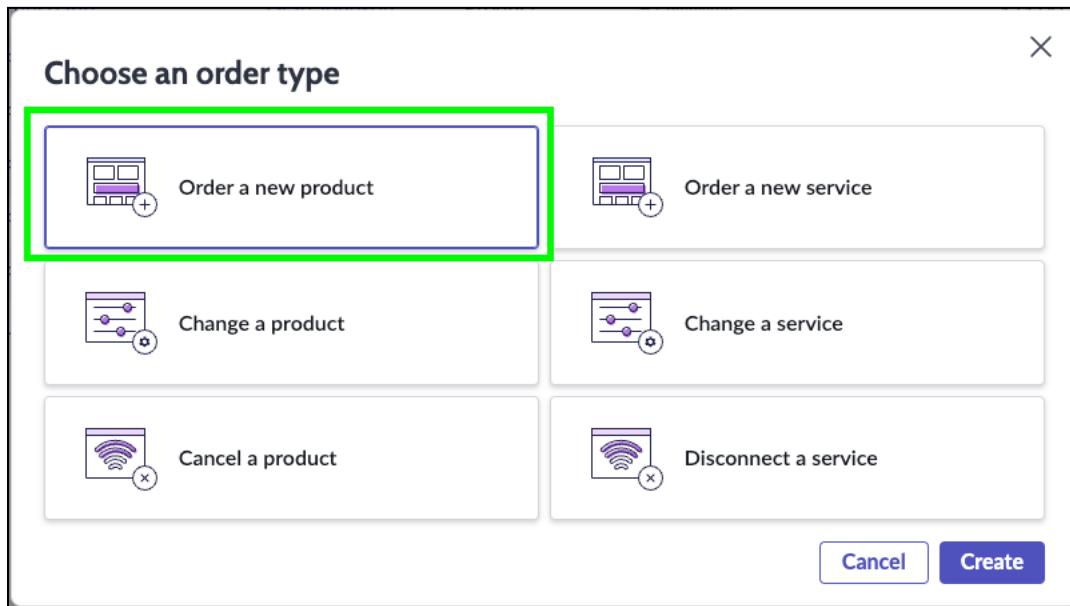
3. Click on the **List menu icon** on the top left.



4. From under **Customer Orders** List, click **All** (if not already open) and click the **New** actionbutton from the top right.



- A pop-up window with the option to choose Order Type appears. Select '**Order a newproduct**' and click the **Create** action button.



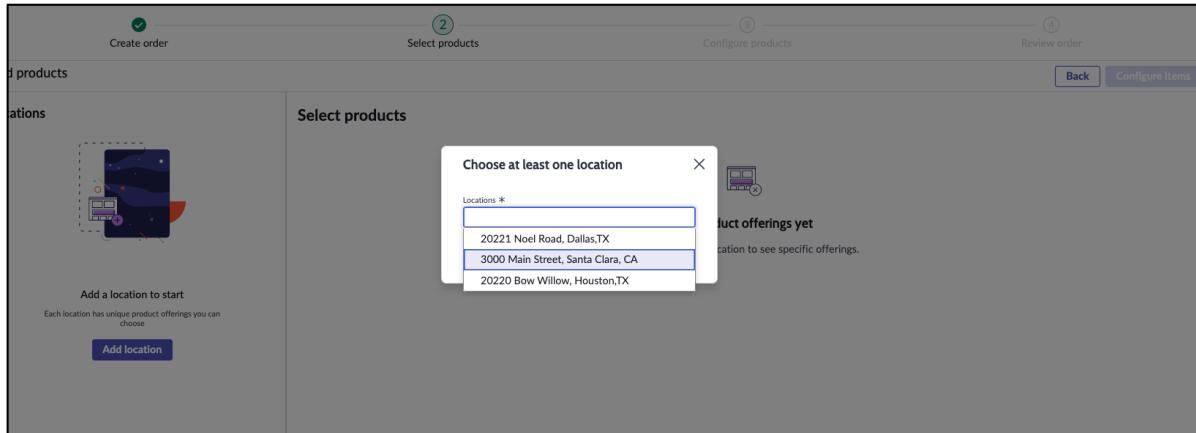
- Clicking **Create** loads a guided ordering flow. Fill in the details as follows –

- Enter Account information –
  - Account = Funco Intl
  - Contact=Sarah Johnson**

Click on **Continue**.

1	2	3	4
Create order	Select products	Configure products	Review order
Enter account information			
Account *	Contact *	Continue	
Funco Intl	Sarah Johnson		

- A pop-up to select a **location** appears (if it does not, refresh the browser)
  - Click in the **Locations** box and select the location as **3000 Main Street, Santa Clara, CA**, from the location choices.
  - Once the Location is added, click on **Add**.
  - Notice the Location getting added to the Order in the left pane.



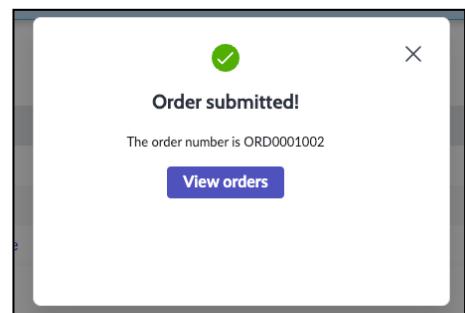
### 3. Select Products –

- Under Product Offerings, select the Offering = **Premium SD-WAN Offering**
- Quantity = 1 remains unchanged.
- Click on **Configure Items**

- After updating the missing info, if any, click on the **Review** action button in the top right.
  - The review page shows the Order Line Items and pricing information.
  - Ignore the information message for the 'compatibility rule.'
- Click on the **Submit** action button to submit the Order.
  - A pop-up returns the Order Number.
  - Click on **View Orders** to continue.

### Section 5.2 Approve Order

- Continue as **Mike Davis**, the *Fulfilment Manager*.



2. In the **Workspace > Customer Orders > All** List, identify the Order submitted in the previous section and click on its number to open it.

<input type="checkbox"/> Number ▾	Account	Contact	Order type	State	Monthly Recurring Charges	Non Recurring Charges	Order date	Jeopardy enabled
<input type="checkbox"/> ORD0000001	Funco Intl	Sarah Johnson	Product	● Completed	\$59.00	\$0.00		false
<input type="checkbox"/> ORD0000002	Funco Intl	Sally Thomas	Product	● Completed	\$50.00	\$15.00	2023-09-20 23:40:29	false
<input type="checkbox"/> ORD0000003	Funco Intl	Sally Thomas	Service	● Completed	\$0.00	\$0.00	2021-06-08 12:34:59	false
<input type="checkbox"/> ORD0000004	Funco Intl	Sally Thomas	Product	● Completed	\$40.00	\$5.00	2024-01-16 02:43:59	false
<input type="checkbox"/> ORD0000005	Funco Intl	Sally Thomas	Product	● Completed	\$15.8947	\$3.9737	2025-03-31 19:44:11	false
<input type="checkbox"/> ORD0000006	Funco Intl	Sally Thomas	Service	● Completed	\$0.00	\$0.00	2025-04-02 11:25:49	false
<input type="checkbox"/> ORD0001001	Funco Intl	Sarah Johnson	Product	● Draft	\$500.00	\$1,000.00	2023-09-25 13:33:19	false
<input type="checkbox"/> ORD0001002	Funco Intl	Sarah Johnson	Product	● New	\$500.00	\$1,000.00	2023-09-25 13:35:15	false

3. On the **Details** tab, observe the following –

- a. Account for which the Order is raised.
- b. State of the Order. Is it **New**?
- c. Version – is it **1**?
- d. PONR flag (Point of No Return – is it unchecked?)
- e. Revision Operation – is it **None**?

**ORD0001002**

Details		Order Orchestration		Account Information		Order Line Items (3)	
<b>Customer Order</b>							
Number	ORD0001002	Order type *	Product	State	New	Fulfillment type *	Deliver
Account	Funco Intl	Contact	Sarah Johnson	Priority	4 - Low	Version	1
Order date	2023-09-25 13:35:15	PONR		Revision operation	None		
<b>Pricing</b>							
Non Recurring Charges	USD (\$1,000.00)	Contract		Total price	USD (\$1,500.00)		
Monthly Recurring Charges	USD (\$500.00)						

4. On the **Account Information** tab, observe the following -
  - a. Customer Summary
  - b. Previously submitted Orders.
  - c. Cases, if any.
  - d. Existing Product Inventory.
5. The **Order Line Items** tab shows the line items submitted as part of this Order.
6. The **Order Orchestration** tab shows a visualization of how the Order & Order Line Items are decomposed into Product/Service/Resource Orders and Order Tasks.
  - a. The view presents the **Order Number**, the **Location** for placing the Order, and the top-level **Order Line Item**.

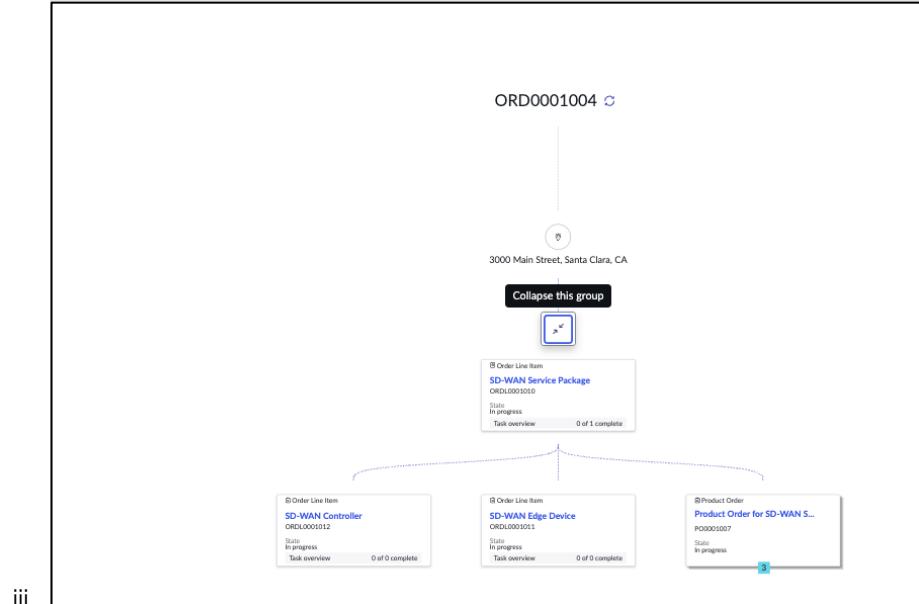
- b. Click on the number  below the Order Line-Item box for the SD-WAN Service Package. The number indicates there are two child components of this Order LineItem.

- i. Clicking on this number gives an option to expand the group. The group is



expanded by clicking on the icon.

- ii. The expanded view looks like the one below.



iii.

**Note:** In this Lab, we will revisit the Order Orchestration tab to view the decomposed view.

7. Navigate back to the **Details** tab of the Order and click on the **Approve** action button on the top right.

Notice the Order state changes from **New** to **Acknowledged** to **In Progress**.

**Note:** Orders can be auto-approved as well.

Approving the Order triggers the Order Management Application to refer to the Product Catalog model to determine the decomposition logic of the Order Line Items.

### Section 5.3 View Project Creation from Order Line Item.

1. Please click on the Order Line-Item tab from the order page.
2. You will see the List of Order Line Items. Open the top-level Order Line Item record for the SD-WAN Service Package.
3. Click on **More>Order Line Task Relationship**.

The screenshot shows the ServiceNow interface for an Order Line Item record. The main panel displays various details like Number, Account, Order type, State, Location, and Priority. On the right, under the 'More' tab, there is a 'Compose' section for comments and work notes, and an 'Activity' section showing a recent change made by 'System Administrator'. A red box highlights the 'Order Line Task Relationship (1)' link in the 'More' tab bar.

**Note:** If the "More" tab is not visible or you don't see the order line task relationship, kindly refresh the screen.

4. Open the Task record in the Order Line Task relationship table.

The screenshot shows the 'Order Line Task Relationship' table with one record. The task details are shown in a card: Task number PRJ0010001, Task state Work in Progress, and Task priority 2. A red box highlights the 'Order Line Task Relation... (1)' link in the 'More' tab bar.

**SD-WAN Service Package**

Project		Activity	
Project Name *	PRJ0010001	System	Work notes • 2023-09-25 12:53:31
Project manager	(Empty)	System	Field changes • 2023-09-25 12:53:30
Status	Green	System	Work in Progress was Pending
State	Work in Progress	Opened by system	
Percent complete	0%	State	Pending
Description	—	Impact	3 - Low
Dates	—	Priority	4 - Low
Schedule	Project Management Schedule		
Approved start date	2023-09-26 08:00:00		
Approved end date	2023-09-26 17:00:00		

**Note:** that the Project Template that will be picked for a given specification of a line item depends on the decision table, as referred to in [section 3.2](#) above.

- Click on the **Project Task** tab.

Project Tasks 1						
Last refreshed 4m ago						
Number ▾	Short description	Dependency	Planned start date	Planned end date	Planned duration	Actual start date
PRJTASK0010001	Product Order for SD-WAN Service Package		2023-09-25 13:00:00	2023-09-26 12:00:00	1 Day	2023-09-25 13:00:00

- If we open the project task of "Product Order for **SD-WAN service package**," this will have a further task as below in the Project Tasks tab.

Product Order for SD-WAN Service Package									
Details	Project Tasks (4)	Resource Plans	Time Cards						
Project Tasks 4									
Last refreshed 5m ago									
PRJTASK0010002	Short description	Dependency	Planned start date	Planned end date	Planned duration	Actual start date			
PRJTASK0010002	Product Order for SD-WAN Security		2023-09-25 13:00:00	2023-09-26 12:00:00	1 Day	2023-09-25 13:00:00			
PRJTASK0010003	Perform Order Validation		2023-09-25 13:00:00	2023-09-26 12:00:00	1 Day	2023-09-25 13:00:00			
PRJTASK0010004	Service Order for SD-WAN Routing		2023-09-25 13:00:00	2023-09-26 12:00:00	1 Day	2023-09-25 13:00:00			
PRJTASK0010006	Complete SD-WAN delivery		2023-09-25 13:00:00	2023-09-26 12:00:00	1 Day	2023-09-25 13:00:00			

Kindly note that this hierarchy is achieved from our template that is described in [section 3.1](#) above

## Section 5.4 Prepare to Process Order Tasks

*As the Order decomposes, the Decision Table conditions are met behind the scenes, which triggers one or more Subflows.*

*In this Lab setup, some of the Subflows contain Order Tasks that require manual action. The following section describes actioning these Order Tasks.*

1. Continue as **Mike Davis**, the *Fulfilment Manager*.
2. In the Configurable Workspace, navigate to the **List** view and click on **My Lists**.



3. At the bottom, click on **Add new List**.
4. A pop-up window appears to create a New List.
  - a. Choose '**Start from existing**'
  - b. Under **List**, from the dropdown, select the existing List – **Orders Tasks > All**.

New List

You can create another version of an existing list or an entirely new one.

[Start from existing](#) [Create your own](#)

List \*

Q\_ Search

Customer Orders

All

Open

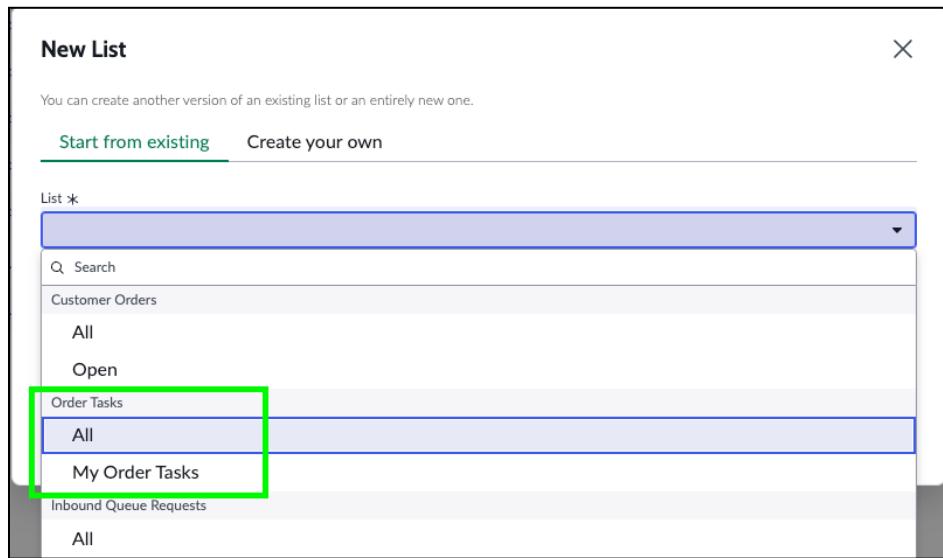
Order Tasks

All

My Order Tasks

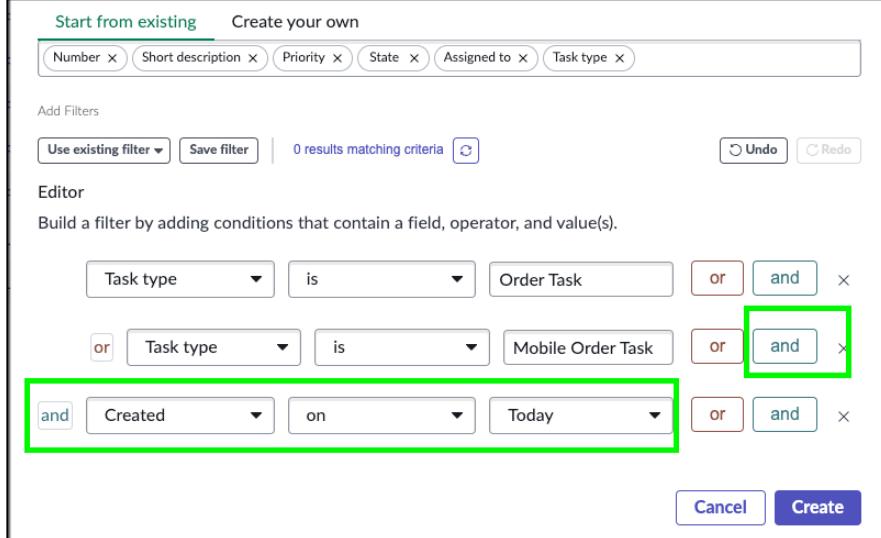
Inbound Queue Requests

All



- a. Rename the List as **Today's Order tasks**.
- b. Add any additional under Select columns or leave it unchanged.  
(Example: **Order Line Item**)
  
  
  
- a. Scroll to the Filter Editor and add a new filter condition using the '**and**'operator.

**i. Set the condition as **Created on Today****



The screenshot shows the ServiceNow Filter Editor interface. At the top, there are tabs for 'Start from existing' and 'Create your own', with 'Start from existing' selected. Below the tabs are several filter criteria buttons: Number, Short description, Priority, State, Assigned to, and Task type, each with a delete icon. Underneath these are buttons for 'Add Filters', 'Use existing filter', 'Save filter', and a status message '0 results matching criteria'. On the right are 'Undo' and 'Redo' buttons. The main area is titled 'Editor' and contains the following logic:

```

Task type is Order Task
or
Task type is Mobile Order Task
or
and
    Created on Today
  
```

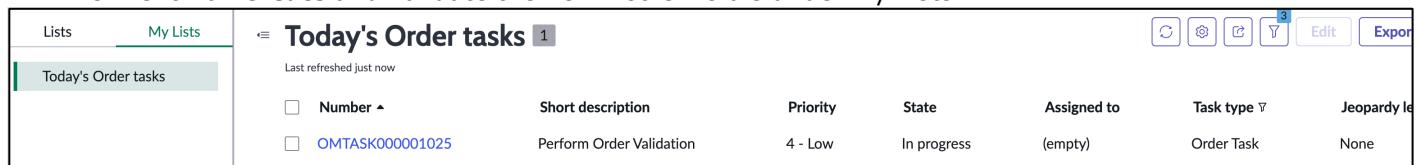
The 'and' operator and its associated 'Created on Today' condition are highlighted with a green box. The entire logical expression is also highlighted with a larger green box.

- b. Scroll down and add a Sort By '**Number ascending**' as follows.



The screenshot shows the 'Sort by' configuration dialog. It has a title 'Sort by' and a subtitle 'Order results by the following fields'. Below this is a dropdown menu for 'Number' and a dropdown for 'ascending'. At the bottom are 'Cancel' and 'Create' buttons, with 'Create' being highlighted.

- c. Click on **Create** and validate the new List is visible under My Lists.



The screenshot shows the 'My Lists' page. On the left, there are tabs for 'Lists' and 'My Lists', with 'My Lists' selected. Below the tabs is a search bar with the placeholder 'Today's Order tasks' and a count of '1'. The main area displays a table with the following data:

Number	Short description	Priority	State	Assigned to	Task type	Jeopardy level
OMTASK000001025	Perform Order Validation	4 - Low	In progress	(empty)	Order Task	None

## Section 5.4 Process Order Tasks

1. Continue as **Mike Davis**.
2. Select the first Order Task, "**Perform Order Validation**."

**Lab Verification:** Do you see the *Project Task Oversight* tab with the linkage to the corresponding project task?

The screenshot shows the 'Perform Order Validation' page. At the top, there are tabs: Details, Order Task Characteristics V..., Project Task Oversight (1), Work Orders, and Task SLAs. The 'Project Task Oversight' tab is highlighted with a green border. Below the tabs, there's a section titled 'Project Task Oversight [1]' with a sub-section 'Last refreshed just now'. It shows a table with three columns: Parent, Child, and Type. The Parent row contains 'OMTASK000001003' and the Child row contains 'PRJTASK0010003'. The Type column has a link 'Related to::Related to'. On the right side of the page, there are several icons: a blue square with a white circle, a blue square with a gear, a blue square with a document, and a blue square with a plus sign labeled 'New'.

3. Mark the Task as "**Closed complete**."

- a. When you close the perform order validation task, the corresponding Project Task record is also completed. You can navigate to the Project Task record and view the Activity Log.

The screenshot shows the 'Project Task' record for 'PRJTASK0010003'. The left panel shows fields like Number, Status (Yellow), and State (Closed Complete). The right panel shows the 'Compose' section with a 'Comments' tab active. A red box highlights an activity entry from 'Mike Davis' stating: 'State changed for Order Task OMTASK000001003 to Closed complete'. Below it, another entry from 'System' states: 'State: Closed Complete was Work-in-Progress' and 'State: Work in Progress was Pending'. The 'Record Information' panel on the right shows the priority is '4 - Low' and the state is 'Closed Complete'.

- b. Refresh the Order task list, and the next Task is "**LLD Creation**," there isn't a linking of project task for this order task as shown in [Section 3.2](#) Decision tables for oversight for order task; hence, no project task will be created and linked.
- c. Close all the tasks individually, and you will observe that the associated project tasks are also completed.
- d. Click the **Save** action button on the top right and **close** the Order Task Tab.

## Section 5.5 Data Sync between Order and Project Entities

30

- As we have seen, the PPM project is linked with the Order line item; if we add any work notes to the order line item, that will be synced to the Project.

The screenshot shows the 'Order Line Item' details for item ORDL0001010. In the center, a 'Compose' window is open, showing a comment: 'A work order request to dispatch an engineer is created.' This comment is highlighted with a red box. To the right, the 'Record Information' panel shows activity logs for system administrators. The 'Activity' section lists three entries, each with a timestamp and a brief description.

- Once the comment is added, navigate to the **More>Order Line task** relationship tab. Open the corresponding Project from the task column.

The screenshot shows the 'Order Line Task Relationship' screen. It displays a table with one row, showing a task assigned to a specific order line item. The task has a status of 'Work in Progress'. The 'Order Line Task Relation...' tab is currently selected.

See the updates flowing through.

The screenshot shows the 'SD-WAN Service Package' screen. In the 'Activity' section, there is an additional comment from 'Mike Davis' stating: 'Additional Comment added by Mike Davis on Order Line Item ORDL0001010: A work order request to dispatch an engineer is created.' This comment is highlighted with a red box. To the right, the 'Record Information' panel shows a history of changes, including a state change from 'In Progress' to 'Work in Progress'.

## Section 5.6 Lab Guide to close further Order tasks

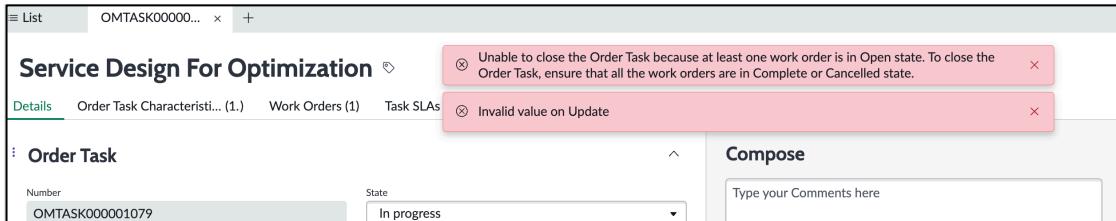
1. In our Lab, while closing the order tasks, you might observe some of the domain orders and order tasks are not getting closed because of the work order associated with it. Once you close these work orders, the order task gets completed, and the associated project task gets closed as well.

i. Domain Order that are impacted because of it are as below:

- a. Product Order for SD-WAN Service Package
- b. Product Order for SD-WAN Edge Device
- c. Product Order for SD-WAN Controller
- d. Resource Order for Customer Premise SD-WAN Router

ii. The order task that is impacted is as follows.

- a. Service Design for Optimization.



2. The work orders created are not a part of the OMT to PPM demo, and hence, we will get rid of these work orders.
3. Copy the work order number from the work order-related List of the order task or the domain order.

Number	State
WO0010026	Draft

A red message box at the bottom left of the table says 'Security prevents writing to this field.'

4. End the impersonation as "Mike Davis" to go back to the administrator login.
5. Go to filter navigator and type **wm\_order.LIST**.

All	Number	Priority	State	Short description
	Search	Search	Search	Search
WOO0010010	4 - Low	Closed Complete	SD WAN site survey - Add SD-WAN Service Package	
WOO0010011	4 - Low	Closed Complete	Install SD-WAN service - Add SD-WAN Edge Device	P00001010
WOO0010012	4 - Low	Closed Complete	Install SD-WAN service - Add Customer Premise SD-WAN Router	P00001011
WOO0010013	4 - Low	Closed Complete	Install SD-WAN service - Add SD-WAN Controller	RO0001014
WOO0010014	4 - Low	Closed Complete	Install SD-WAN service - Service Design For Optimization for SD WAN	PO0001012
WOO0010015	4 - Low	Closed Complete	SD WAN site survey - Add SD-WAN Service Package	PO0001013
WOO0010016	4 - Low	Closed Complete	Install SD-WAN service - Add SD-WAN Edge Device	PO0001014
WOO0010017	4 - Low	Closed Complete	Install SD-WAN service - Add Customer Premise SD-WAN Router	RO0001017
WOO0010018	4 - Low	Closed Complete	Install SD-WAN service - Add SD-WAN Controller	
WOO0010019	4 - Low	Awaiting Qualification	Install SD-WAN service - Service Design For Optimization for SD WAN	
WOO0010020	4 - Low	Cancelled	Install SD-WAN service - Add SD-WAN Controller	
WOO0010021	4 - Low	Draft	Install SD-WAN service - Add Customer Premise SD-WAN Router	
WOO0010022	4 - Low	Draft	SD WAN site survey - Add SD-WAN Service Package	
WOO0010023	4 - Low	Draft	Install SD-WAN service - Add SD-WAN Edge Device	
WOO0010024	4 - Low	Draft	Install SD-WAN service - Add Customer Premise SD-WAN Router	
WOO0010025	4 - Low	Draft	Install SD-WAN service - Add SD-WAN Controller	
WO90010001	4 - Low	Work In Progress	Router setup inter communication	

Add the "**Initiated from**" column from the personalized list columns option.

Personalize List Columns X

Available	Selected
Template WO known invoked	
Time worked	
Transfer reason	
Universal Request	
Updated	
Updated by	
Updates	
Upon approval	
Upon reject	
Urgency	
User	
User input	
Vendor reference	
Watchlist	
Work notes	
Work notes list	
Initiated from	

Wrap column text  Compact rows  Active row highlighting  
 Modern cell coloring

All	Number	Priority	State	Short description	Initiated from
	Search	Search	Search	Search	Search
WOO0010010	4 - Low	Closed Complete	SD WAN site survey - Add SD-WAN Service Package		P00001010
WOO0010011	4 - Low	Closed Complete	Install SD-WAN service - Add SD-WAN Edge Device		P00001011
WOO0010012	4 - Low	Closed Complete	Install SD-WAN service - Add Customer Premise SD-WAN Router		RO0001014
WOO0010013	4 - Low	Closed Complete	Install SD-WAN service - Add SD-WAN Controller		PO0001012
WOO0010014	4 - Low	Closed Complete	Install SD-WAN service - Service Design For Optimization for SD WAN		OMTASK00000103
WOO0010015	4 - Low	Closed Complete	SD WAN site survey - Add SD-WAN Service Package		PO0001013
WOO0010016	4 - Low	Closed Complete	Install SD-WAN service - Add SD-WAN Edge Device		PO0001014
WOO0010017	4 - Low	Closed Complete	Install SD-WAN service - Add Customer Premise SD-WAN Router		RO0001017

6. Search with the Work Order Number in the List above and open the record.
7. Just update the Work Notes and then click on the button.

The screenshot shows the ServiceNow Work Order interface for a work order WO0010026. The status bar at the top includes 'Follow', 'Update', 'Suspend', 'Ready For Qualification' (which is highlighted with a red box), and 'Cancel'. Below the status bar, there's a note field asking for a reason for cancellation in 'Work notes'. A red box highlights the 'not needed' entry in this field. The main panel displays various details about the work order, such as Number (WO0010026), Company (Funco Intl), Contact (Sarah Johnson), Asset, Affected CI, Location (3000 Main Street, Santa Clara, CA), Template (Install SD-WAN service), and Description (Install SD-WAN service - Work order for OMTASK000001079). The work order is currently in the 'Draft' state.

8. This will cancel the Work Order.
9. Impersonate **Mike Davis**.

The screenshot shows the 'Select a user' interface. It features a search bar labeled 'Search for a user' and a list of recent impersonations. Two users are listed: 'James Smithson' (with initials JS) and 'Mike Davis' (with initials MD). The 'Mike Davis' entry is highlighted with a red box.

10. Try closing the Order task now. It will work.

The screenshot shows a list of order tasks. One task, 'OMTASK000001014: Service Design For Routing', is currently open, indicated by a blue border around its row. Other tasks listed include 'OMTASK000001015: Configure Route Target', 'OMTASK000001016: Service Design For Optimization', and 'OMTASK000001017: Configure Licence'. Each task has a status column showing 'In progress' or 'Open'.

<input type="checkbox"/> OMTASK000001014	Service Design For Routing	3 - Moderate	Open	Order Task	None
<input type="checkbox"/> OMTASK000001015	Configure Route Target	3 - Moderate	In progress	Order Task	None
<input type="checkbox"/> OMTASK000001016	Service Design For Optimization	3 - Moderate	(empty)	Order Task	None
<input type="checkbox"/> OMTASK000001017	Configure Licence	3 - Moderate	In progress	Order Task	None

11. The Order Line Item is complete once all the Order Task records are closed.

## ORDL0001027

[Details](#) [Order Orchestration](#) [Order Characteristics](#) [Order Line Item Contacts](#) [Order Line Related Items](#)

## Order Line Item

Number	Account
ORDL0001027	Funco Intl
Order *	Order type *
ORD0001013	Product
Parent line item	State
—	Completed
Product offering	Location
Premium SD-WAN Offering	3000 Main Street, Santa Clara, CA

- With the Project, that can continue as some tasks may need to be manually closed.
- If you open the Project, there is a task for SD-WAN security, but since the customer didn't order the security order line item, this Task will be skipped manually. This demonstrated that PPM could have more or fewer tasks than the order task in the order line item.
- Open the **Project** from the top line item from the Order Line Task Relationship.

## ORDL0001027

[Details](#) [Order Orchestration](#) [Order Characteristics](#) [Order Line Item Contacts](#) [Order Line Related Items](#) [Product Orders \(1\)](#) [Order Line Task Relation... \(1\)](#) [More ▾](#)

## Order Line Task Relationship 1

Last refreshed 3m ago

Number	Task	State
OLTASK0001006	PRJ0010006	Work in Progress

- Open the Project and see the Project Task record.

## SD-WAN Service Package

[Details](#) [Project Tasks \(1\)](#) [Agile Phase](#) [Sub Projects](#) [Stories](#) [Epics](#) [Requirements](#) [Resource Plans](#) [Cost Plans](#) [Monetary Benefit Plans](#) [More ▾](#)

## Project Tasks 1

Last refreshed 8m ago

No	Short description	Dependency	Planned start date	Planned end date	Planned duration	Actual start date
PRJTASK0010031	Product Order for SD-WAN Service Package		2023-09-26 08:00:00	2023-09-26 17:00:00	1 Day	2023-09-26 08:00:00

- Click the project task further. Since we didn't have SD-WAN Security, this Task remains open and can be skipped manually.

Product Order for SD-WAN Service Package 

Details Project Tasks (4) Resource Plans Time Cards

List Actions

Project Tasks 4

Last refreshed just now

Number ▾	Short description	Dependency	State	Planned start date	Planned end date	Planned duration
PRJTASK0010032	Product Order for SD-WAN Security		Work in Progress	2023-09-26 08:00:00	2023-09-26 17:00:00	1 Day
PRJTASK0010033	Perform Order Validation		Closed Complete	2023-09-26 08:00:00	2023-09-26 17:00:00	1 Day
PRJTASK0010034	Service Order for SD-WAN Routing		Closed Complete	2023-09-26 08:00:00	2023-09-26 17:00:00	1 Day
PRJTASK0010036	Complete SD-WAN delivery		Closed Complete	2023-09-26 08:00:00	2023-09-26 17:00:00	1 Day

**Lab Verification:** Do you see that the rest of the Project Tasks are completed?

17. Once the project task is updated to "Closed Skipped," the Project is marked completed.

Details Project Tasks (4) Resource Plans Time Cards

Project Tasks 4

Last refreshed 2m ago

Number ▾	Short description	Dependency	State	Planned start date	Planned end date	Pla
PRJTASK0010032	Product Order for SD-WAN Security		Work in Progress	2023-09-26 08:00:00	2023-09-26 17:00:00	1 D
PRJTASK0010033	Perform Order Validation		Pending	26 08:00:00	2023-09-26 17:00:00	1 D
PRJTASK0010034	Service Order for SD-WAN Routing		Pending	26 08:00:00	2023-09-26 17:00:00	1 D
PRJTASK0010036	Complete SD-WAN delivery		Pending	26 08:00:00	2023-09-26 17:00:00	1 D

A dropdown menu is open over the 'Pending' state for the second task. The menu options are: Pending, Open, Work in Progress, Closed Complete, Closed Incomplete, and Closed Skipped. The 'Closed Skipped' option is highlighted with a blue border.

## SD-WAN Service Package

Project Tasks (1) Agile Phase Sub Projects Stories

### Project

Project Name *	Number
SD-WAN Service Package	PRJ001000
Project manager	Assigned to
(Empty)	
Status	Assignment group
Green	
State	Additional assign
Closed Complete	
⌚ admin has modified this field value	
Percent complete	75%

**Congratulations! You have completed this Lab.**