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Lab Guide

Service Creator: Rapidly Create Service-Oriented Applications

Steve Ly & Gary Van Roy

Default Login / Password:

admin / Knowledge15

itil / Knowledge15

employee / Knowledge15

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Lab Goal

Lab 1.0 Defining Strategy

This lab will teach you how to:

- Identify Services
- Determine Service Catalog Item vs. Service Creator
- Determine what can be automated

Identifying Services

Review the below scenario and determine:

1. What responsibilities are actually services
2. What services could be potentially automated

Scenario

The manager responsible for managing the company's 401k plans has been manually accepting requests via email for updates and/or changes to employee information. The manager was recently injured in a bizarre bicycling incident and was out for a few weeks. During the manager's absence, HR support staff was unable to process any employee information change requests. The HR director has identified this same issue as a serious gap in many of the other services that small HR department provides for employees. The HR staff was asked to review their daily tasks and identify any services that they could automate. The HR director wants to take this opportunity to utilize the new IT service management tool recently deployed to help automate the manual processes within the HR department.

HR Staff Responsibilities:

- Periodically send out diversity surveys
- Communicate company wide announcements
- Post any updated ISO standards in the break room
- Complete any external job verification forms for current or past employees
- Audit and verify employees have completed sexual harassment and security training
- Review and fulfill any HR requests
- Update/Change 401k, medical and general employee information
- Process leave, PTO and Family and Medical Leave requests
- Verify an employee's legal status
- Employee onboarding and off boarding activities
- Review and address any legal requests

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Managing New and Existing Services

Review the below scenario and determine:

1. What is the best solution for setting up the new PC upgrade request?
2. What can be done to alleviate the CTO's concerns?

Scenario

A new company has recently been contracted to provide new IT hardware (PC, Phones, and Monitors) upgrades for all of the employees. A question has arisen regarding the priority of the upgrades for employees. The CTO and CIO have agreed that designated critical staff members are the first to be upgraded, but also acknowledges that there will be cases where employees outside of the critical staff will also require a upgrade as soon as possible.

The CIO has recommended that they create a service request to allow the non-critical staff employees to request a new PC, since there are service requests already available for new monitors and phones. The CTO suggests that any upgrade requests (from non-critical staff) must be approved by the employee's direct manager.

The CTO is concerned that employees would find it difficult to submit multiple requests for the various upgrades offered as well as the ability of the IT support staff to manage and process the increase in requests for upgrades.

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Business Process Improvement with Services

Review the below scenario and determine:

1. What services are required for the process
2. Which activities can be automated with workflows
3. Where the services will be created and managed (Service Creator vs. Service Catalog Item)

Scenario

You are the asset manager for a small toy manufacturing company. Your company maintains its competitive advantage by responding quickly to trends in the toy market and fulfilling orders for toys in very short timescales. Your team is responsible for processing and submitting requests for equipment and consumables to the purchasing team. The process begins with your team receiving a request (via emails or phone calls) then a second request has to be generated in the current purchasing request system which has a workflow that has multiple approvals and tasks. The entire process takes about 3 weeks to complete (2 weeks for your team and 1 week for the purchasing team.)

For every request for equipment or consumable, your asset staff team must perform the below activities.

- An asset staff member reviews request for all required specifications and information.
- An asset staff member verifies that the Quality Control, IT, or Security teams have approved the item(s) for use.
  - If the item(s) are not on the pre-approved list a request must be submitted and approved for:
    - An exception
    - To add the item(s) to the pre-approved list
- An asset staff member will request quotes from three (3) different vendors.
- The requester must review and accept one of the quotes.
- Once a quote has been accepted an asset staff member will generate a purchase order for approval.

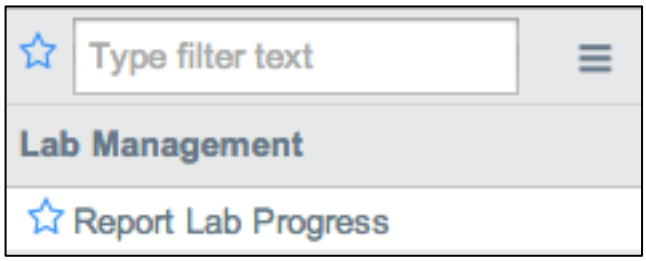
You have noticed in the last few months a number of items have been received without associated purchase orders and your staff is unable to explain the additional items. You speak with the users listed on the shipping labels and have discovered that users have started purchasing their own equipment and consumables using a corporate credit card, since they believe they will receive it more quickly. You realize that you are short staffed and unable to process the large number of equipment and consumable requests in a timely manner and in some cases the requests have been lost or overlooked.

You have been told that due to cost control, no additional staff can be employed, so you will need to improve you request fulfillment process to make better use of existing staff. You just don't know the best method to do so within the current IT service management tool.

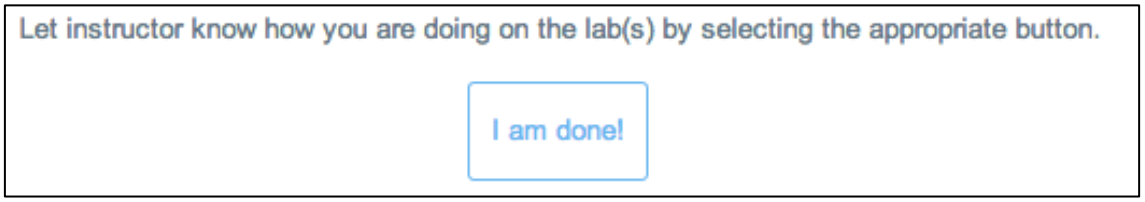
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Progress Report

1. Navigate to **Lab Management> Report Lab Progress**.



2. Click **I am done!**



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Lab Goal

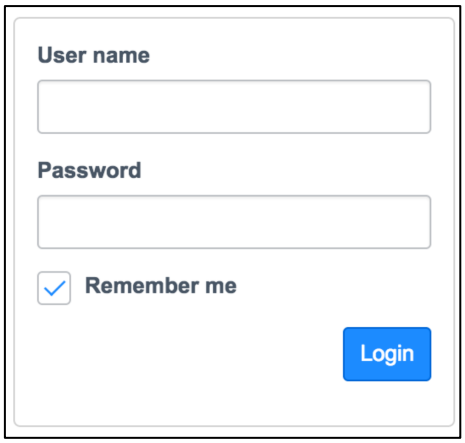
This lab will teach you how to:

- Enable Service Creator Plugin
- Modify the existing Service Category Record Producer
- Setup Departments, Users and Groups

Lab 2.0 Service Category Prep

Log on to Your Training Instance

1. Navigate to the unique instance URL provided.

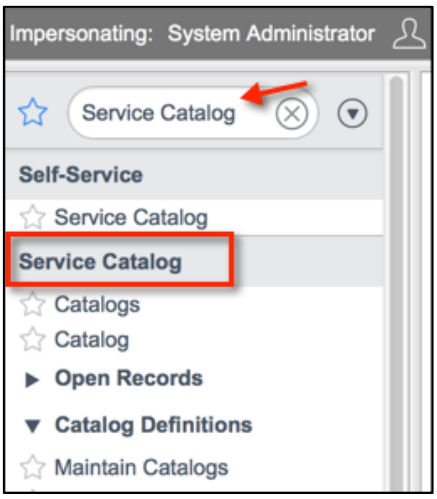


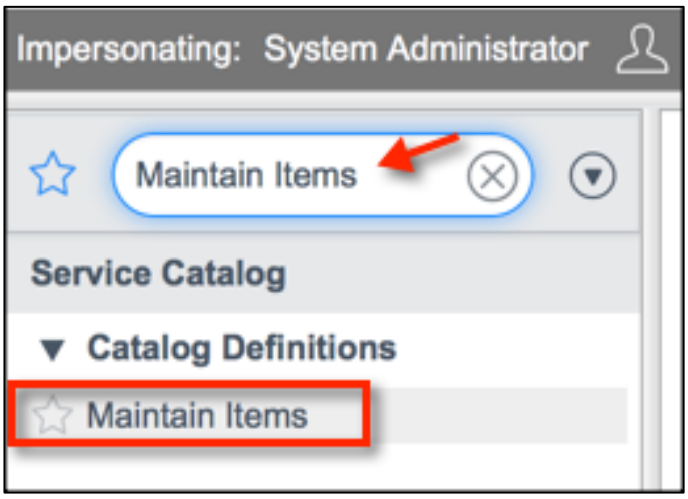
2. Log on with the provided credentials.

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Navigation Tip

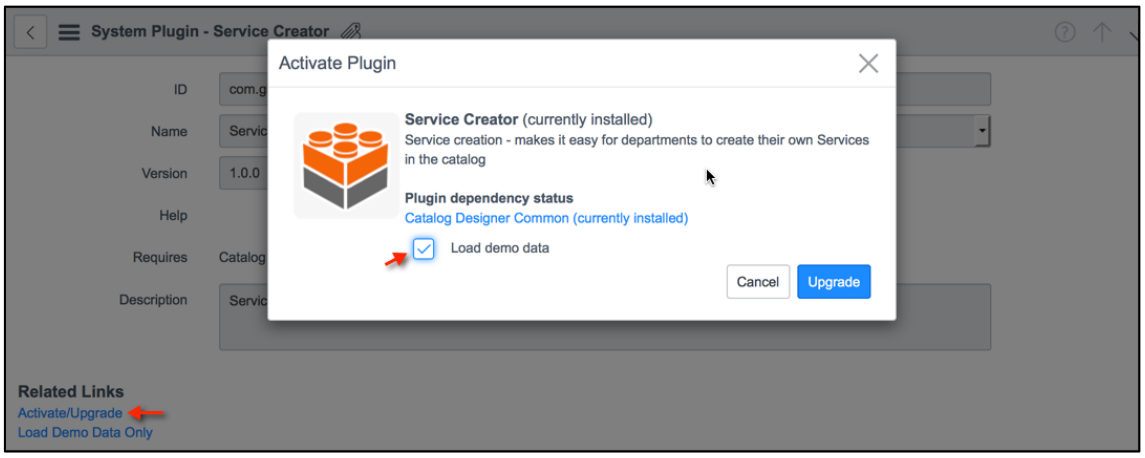
When navigating through ServiceNow, use the filter in the left Navigation pane to limit your options. If you are unsure on how to navigate use this Wiki article.





Enable the plugin

1. Navigate to **Service Definition > Plugins** and find **Service Creator** in the list and click it.
2. Click the **Activate/Upgrade** link under **Related Links**, check **Load Demo Data**, and click **Activate**.



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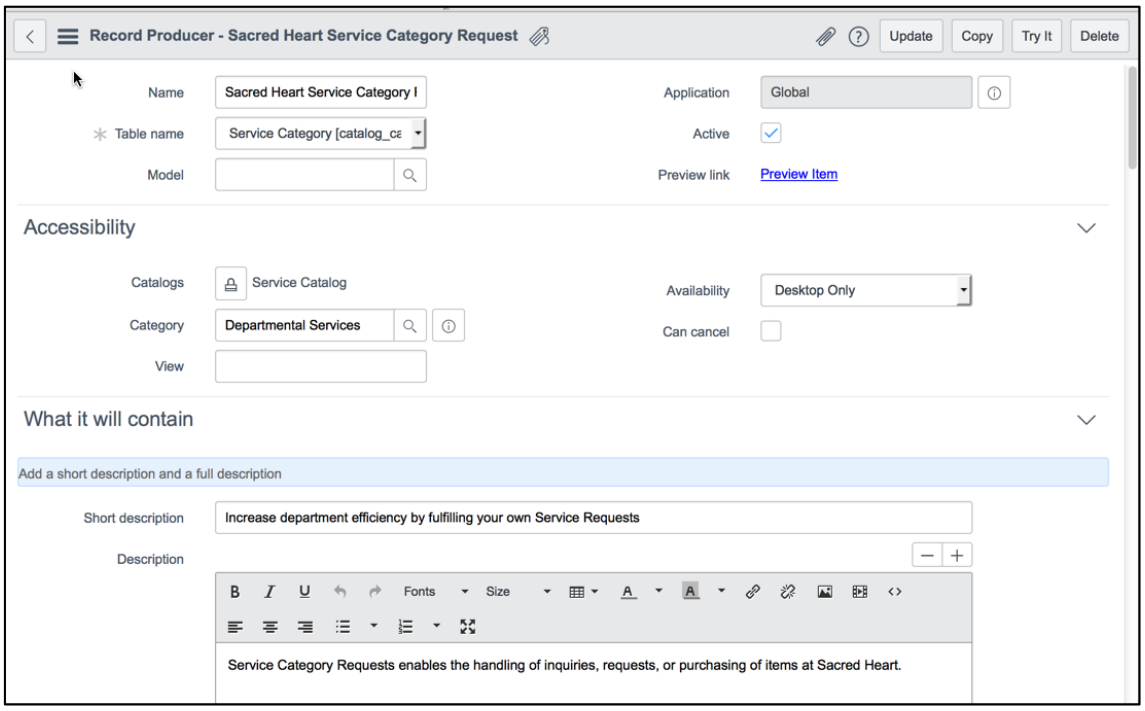
Modifying a Record Producer

1. Navigate to **Service Catalog > Catalog Definitions > Record Producers**.

2. Locate and select **Service Category Request** record producer.

3. Update the form with the information below:

   Name: **Sacred Heart Service Category Request**
   Short description: **Increase department efficiency by fulfilling your own Service Requests**
   Description: **Service Category Requests enables the handling of inquiries, requests, or purchasing of items at Sacred Heart.**



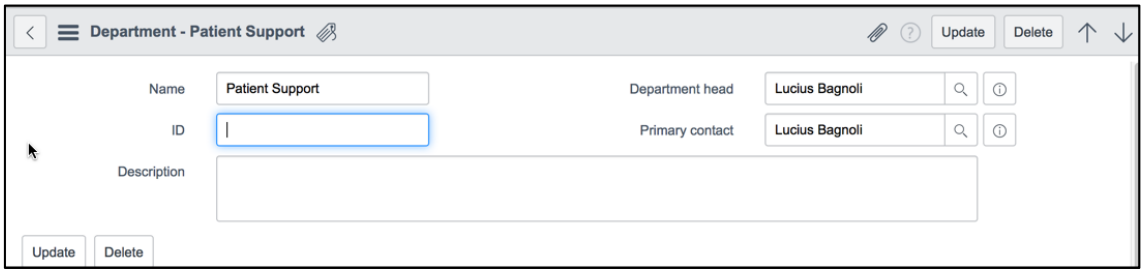
4. Click **Update** on the header.

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Setting up Departments, Users, and Groups

1. Navigate to **Organization > Departments** and click **New**. Fill out the form with the information below:

   Name: **Patient Support**
   Department head: **Lucius Bagnoli**
   Primary contact: **Lucius Bagnoli**



2. Click **Submit** on the header.

3. Navigate to **Organization > Users** and click **New**.

4. Create the below users:

   User ID: **bob.kelso**
   Name: **Bob Kelso**
   Title: **Doctor**
   Department: **Patient Support**

   User ID: **greg.house**
   Name: **Gregory House**
   Title: **Doctor**
   Department: **Patient Support**

   User ID: **david.tennant**
   Name: **David Tennant**
   Title: **The Doctor**
   Department: **Patient Support**

5. Navigate to **System Security > Users and Groups > Groups** and click **New**. Create the below group:

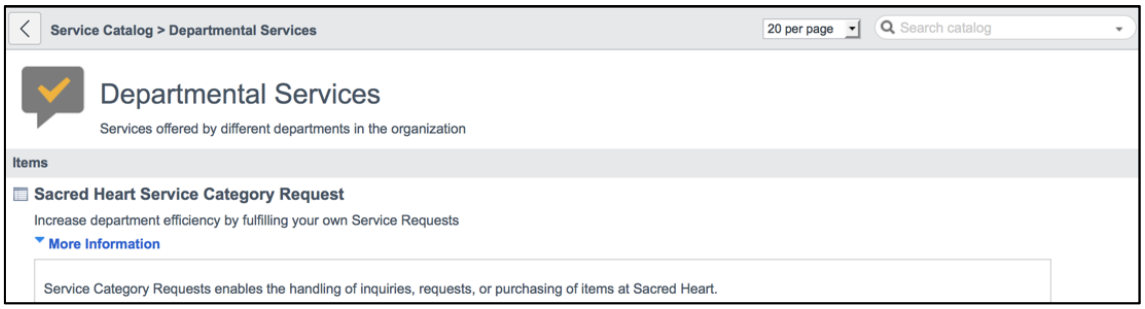
   Name: **Patient Fulfillment**
   Manager: **David Tennant**

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6. Right click the header and click **Save**.
7. Click **Edit** on the **Group Members** Related List. Add **David Tennant** to the group.
8. Click **Save**.

Lab Success Verification

1. Navigate to **Self-Service > Service Catalog**.
2. Select the **Departmental Services** category.
3. Verify your **Scared Heart Service Category Request** record producer looks like the example.



Progress Report

1. Navigate to **Lab Management> Report Lab Progress**.
2. Click **I am done!**

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Lab Goal

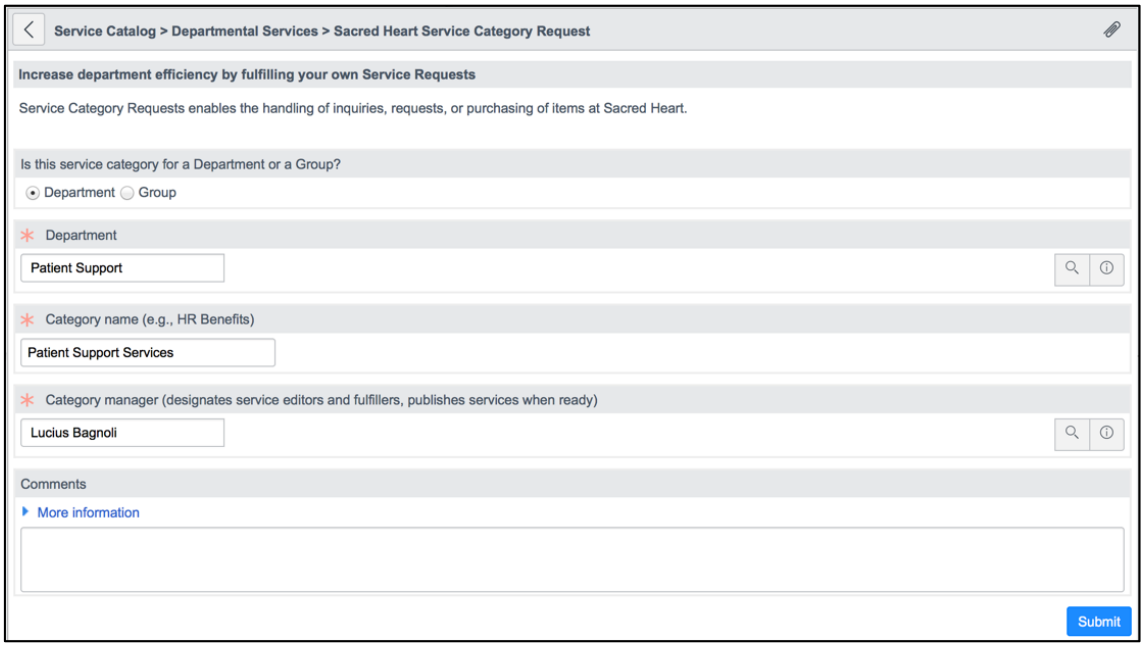
This lab will teach you how to:

- Request a New Service Category
- Publish the requested Service Category

Lab 2.1 Request and Publish

Request a New Service Category

1. Navigate to **Self-Service > Service Catalog**.
2. Select the **Departmental Services** category.
3. Click on the **Sacred Heart Service Category Request**.
4. Set the **Department** to **Patient Support** and keep the default values for the remaining variables.

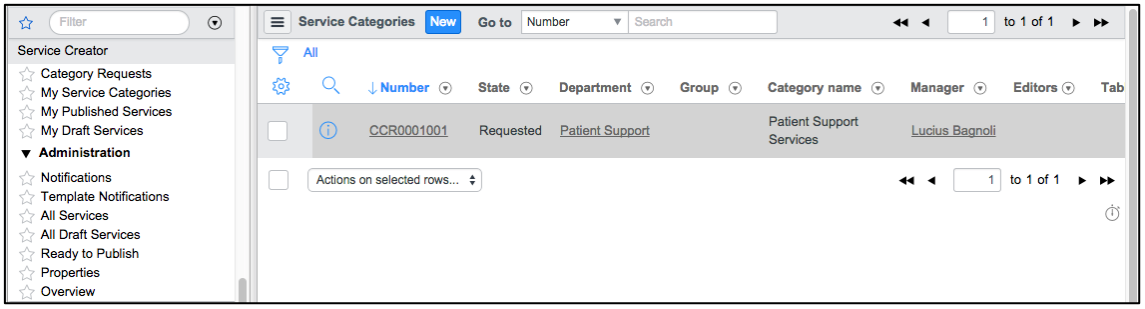


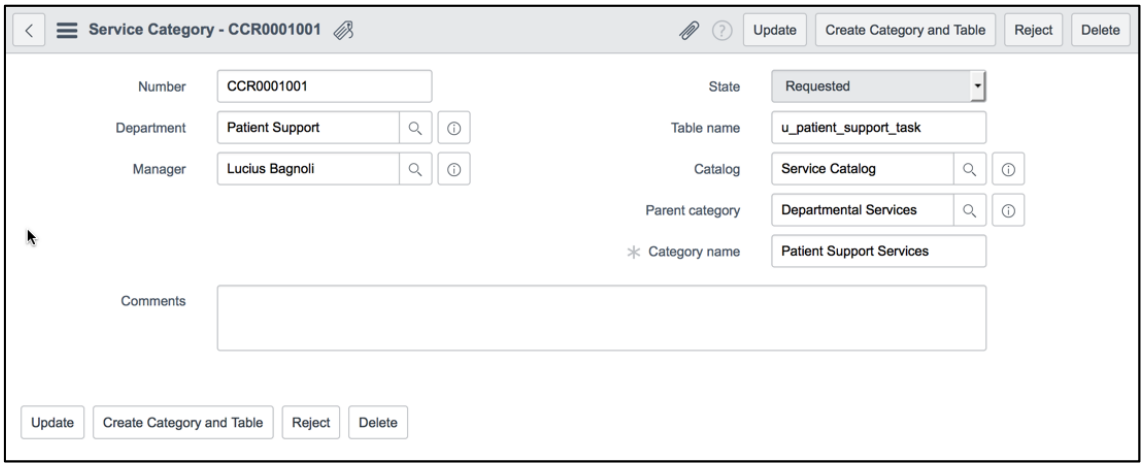
5. Click **Submit**.

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Publish Service Category

1. Navigate to **Service Creator > Category Requests** to view submitted requests.
2. Click on the request you submitted for **Patient Support Services**.



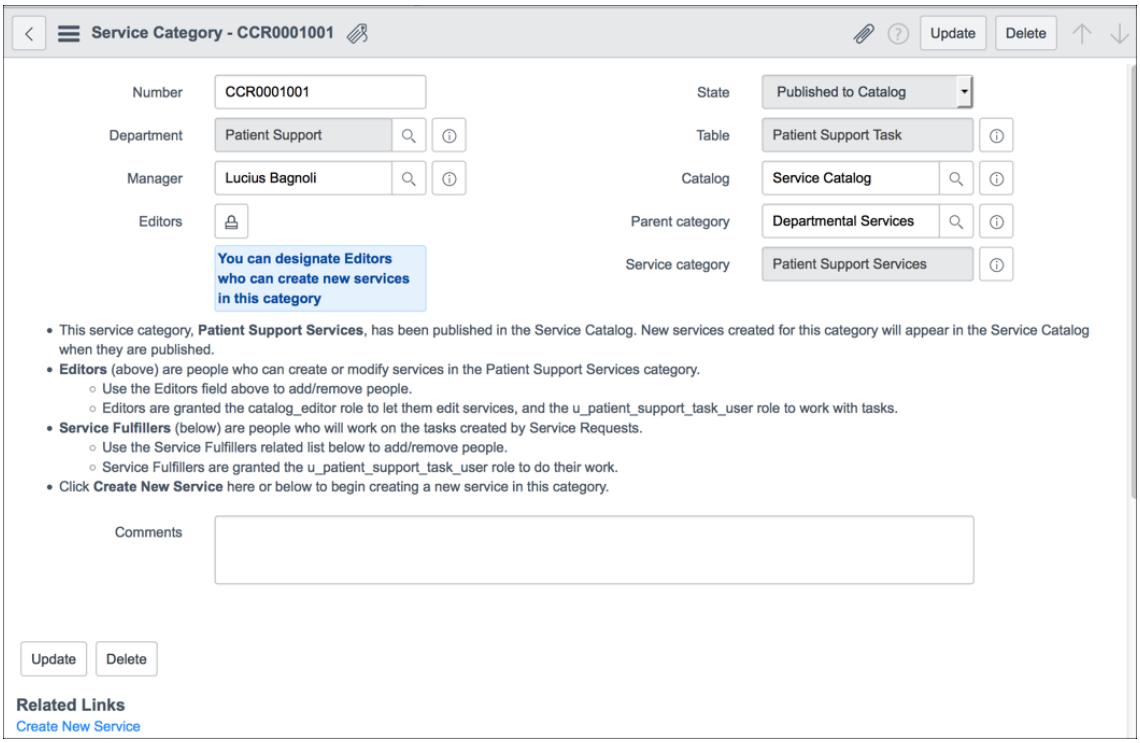


3. Click on **Create Category and Table**.

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Lab Success Verification

1. Navigate to **Service Creator > Category Requests** to view submitted requests.
2. Click on the request you submitted for **Patient Support Services**.
3. Verify that your **Patient Support Services** form likes like the example.



Progress Report

1. Navigate to **Lab Management> Report Lab Progress**.
2. **Click I am done!**

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Lab Goal

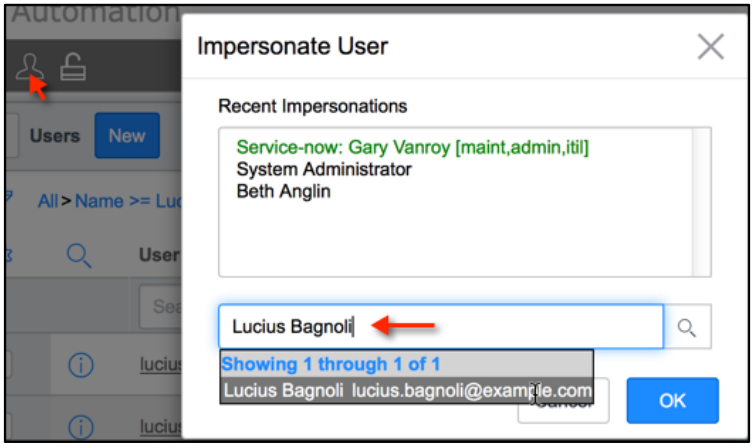
This lab will teach you how to:

- Setup Editors for a Service Category
- Setup Fulfillers for a Service Category

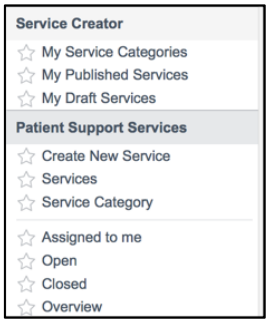
Lab 2.2 Editors and Fulfillers

Setup Editors

1. Impersonate **Lucius Bagnoli**.



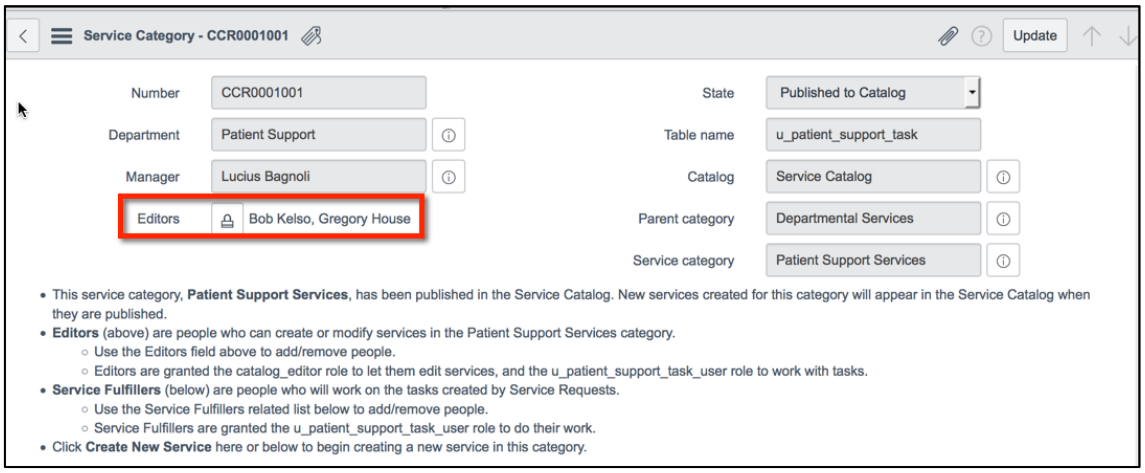
2. Navigate to **Patient Support Services** and click on **Service Category**.



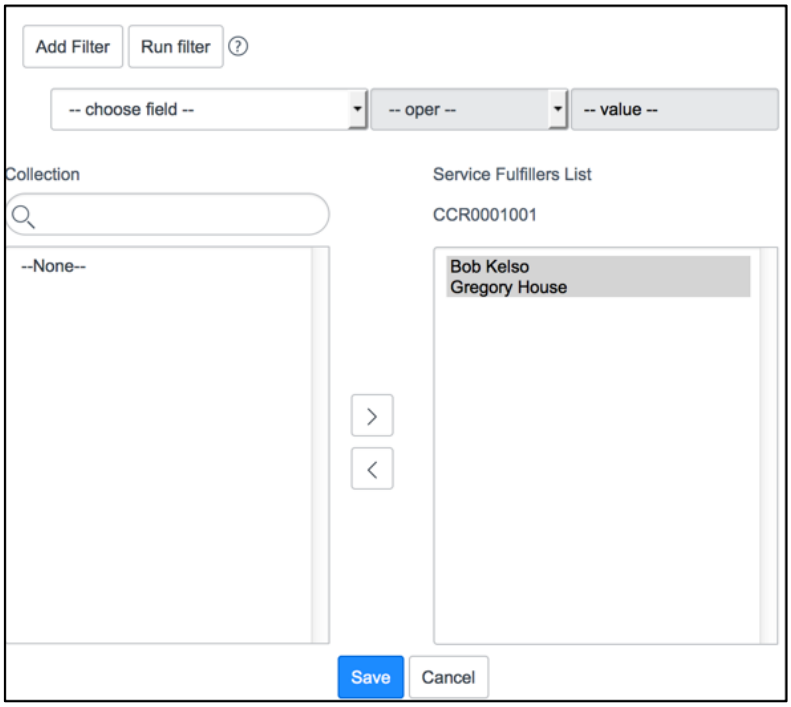
3. Click the **Edit** button for the **Editors** field and add **Bob Kelso** and **Gregory House**.

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4. Right click the header and **Save**.



5. On the **Service Fulfillers** Related List click **Edit** and add **Bob Kelso** and **Gregory House**.



6. Click **Save**.

Progress Report

1. Navigate to **Lab Management> Report Lab Progress**.
2. Click **I am done!**

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Lab Goal

This lab will teach you how to:

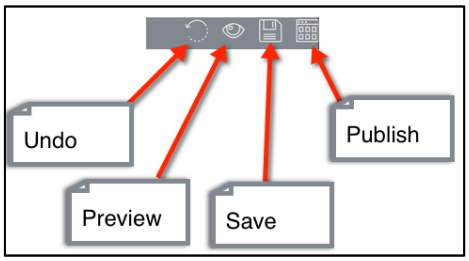
- Create a Service for your Service Category

Lab 3.1 Creating a Service

Creating a Service

1. Continue to impersonate **Lucius Bagnoli**.
2. Navigate to **Patient Support Services > Create New Service**.
3. Design your service with the following and click **Save**.

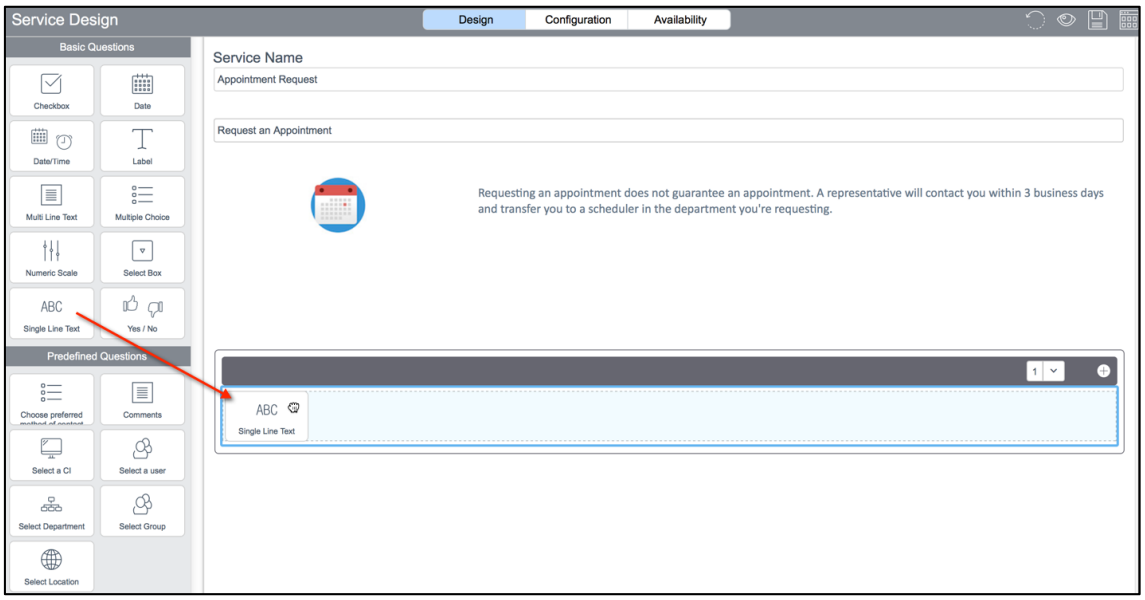
TIP:



Service Name: **Appointment Requests**
Short Description: **Request an Appointment**
Description: **Requesting an appointment does not guarantee an appointment. A representative will contact you within 3 business days and transfer you to a scheduler in the department you're requesting.**
Image: **Appointments.png**

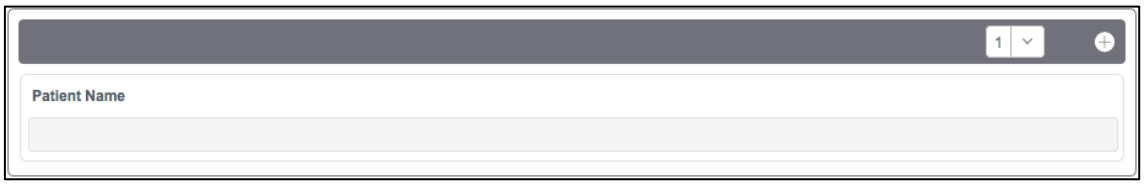
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4. Create the questions for the form by dragging the Basic Question types from the left onto the form. Select **Single Line Text** and drag it onto the form.



5. Highlight the **New Single Line Text** and delete the predefined text and enter in **Patient Name** as the new value.





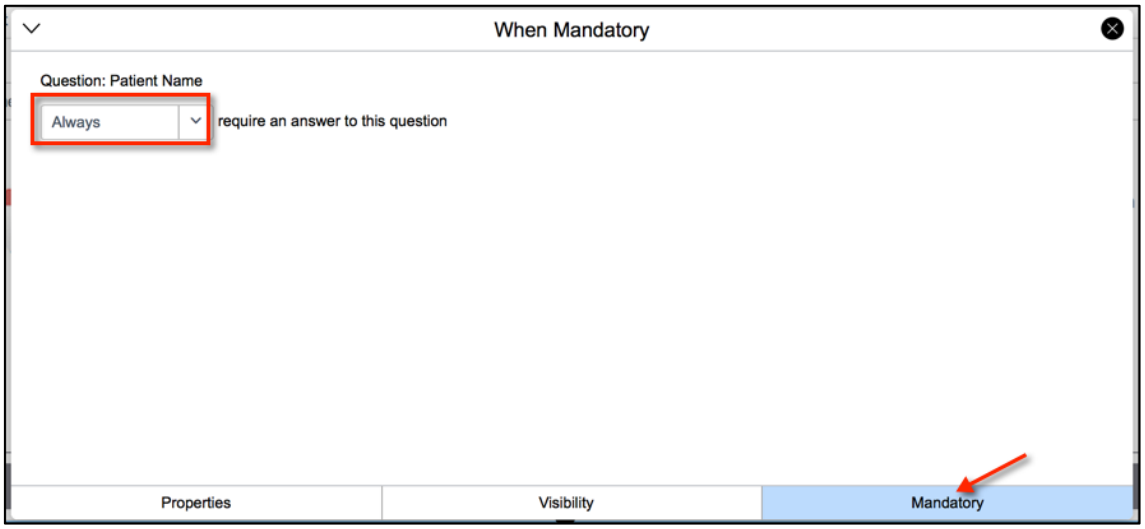
6. Hover over the variable and click the  icon.



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7. Select the **Mandatory** tab at the bottom of the pop-up.

8. Click on the drop down and select **Always.**



9. Click on the "**X**" to return to the form.

10. Repeat steps 4 - 9 to add additional questions.

    Question Type: **Yes / No**
    Question: **Is this an urgent appointment?**
    Mandatory: **Always**

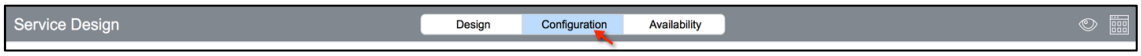
    Question Type: **Select Person**
    Question: **Who is the Doctor you would like to request an appointment with?**
    Mandatory: **Always**

    Question Type: **Date/Time**
    Question: **Requested date and time of appointment**
    Mandatory: **Always**

11. Click the **Save** icon to save form design.

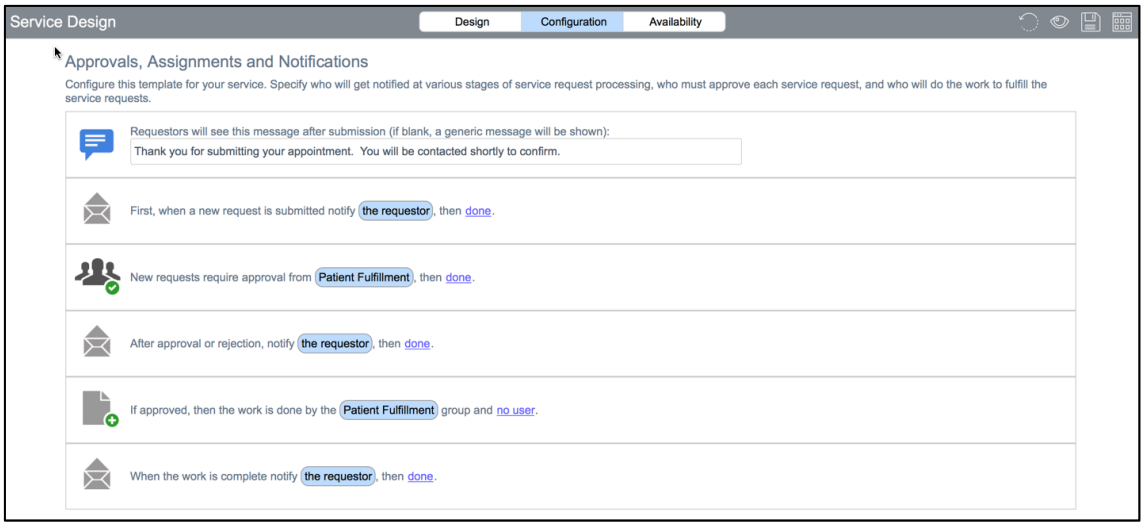
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12. Click the **Configuration** button at the top and set the values below.



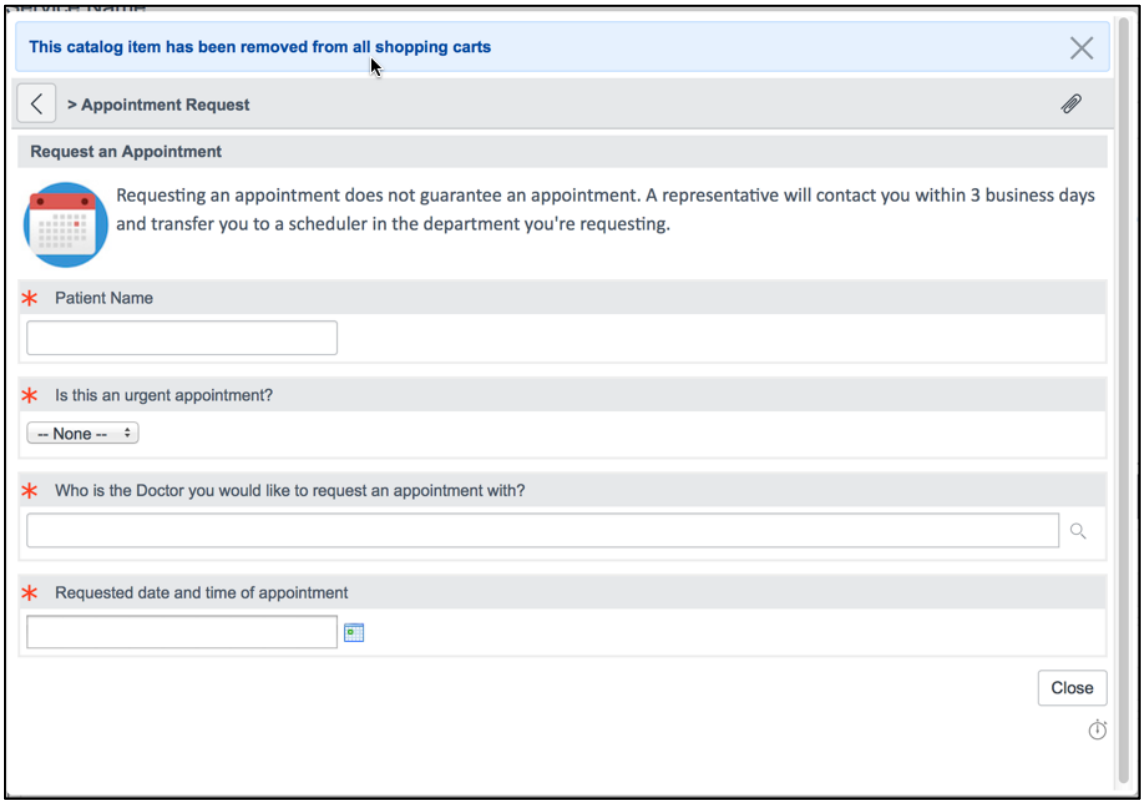
13. Complete the form with the below information.

- Requestors will see this message after submission (if blank, a generic message will be shown):
  - **Thank you for submitting your appointment. You will be contacted shortly to confirm.**
- First, when a new request is submitted notify **the requestor**, then done.
- New requests require approval from **Patient Fulfillment**, then done.
- After approval or rejection email, notify **the requestor**, then done.
- If approved, then the work is done by the **Patient Fulfillment** group and no user.
- When the work is complete notify **the requestor**, then done.



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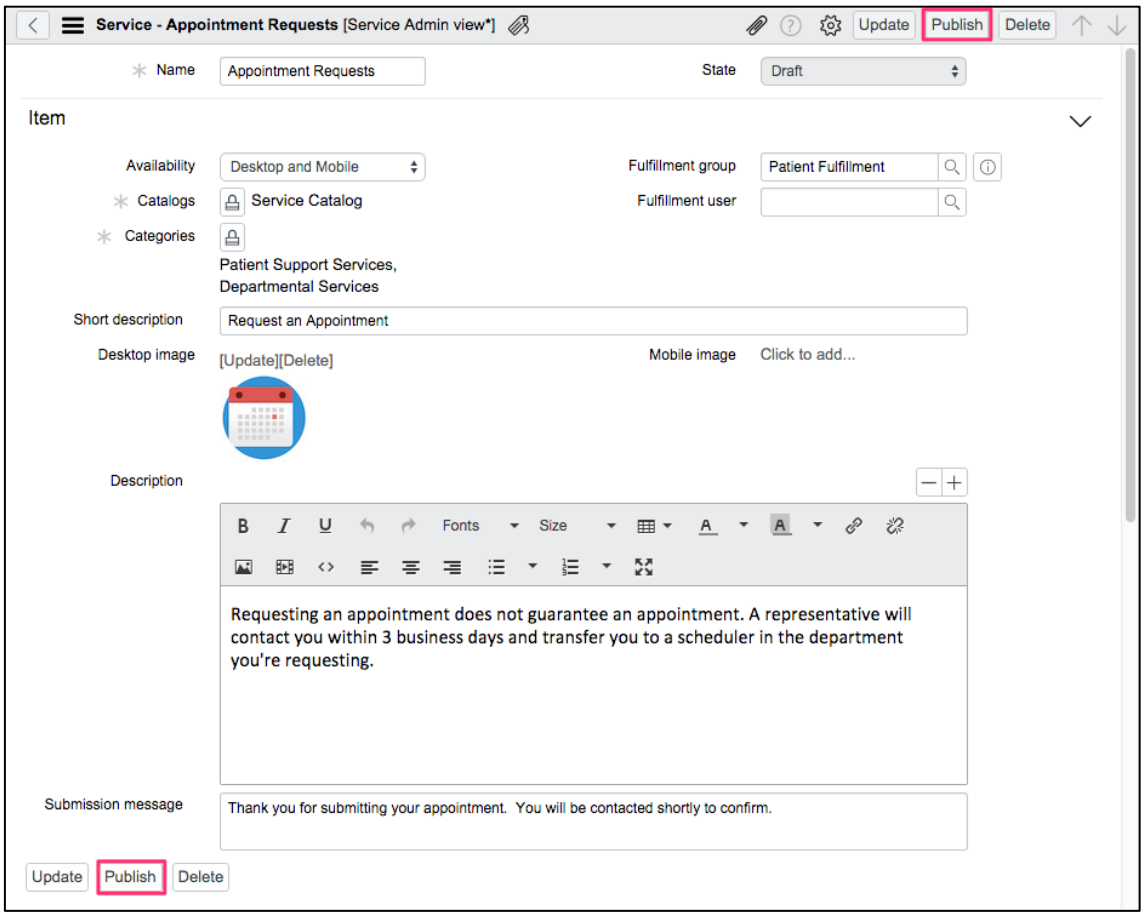
14. Click the **Preview** button and you should see the same information as the image below.



15. Click **Close** to return to the service record.

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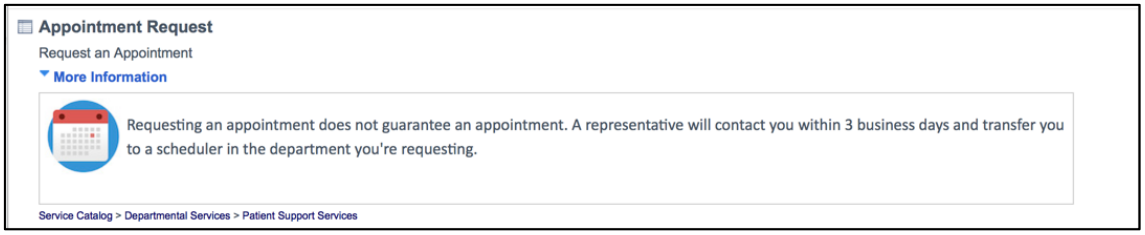
16. Click the **Publish** button.



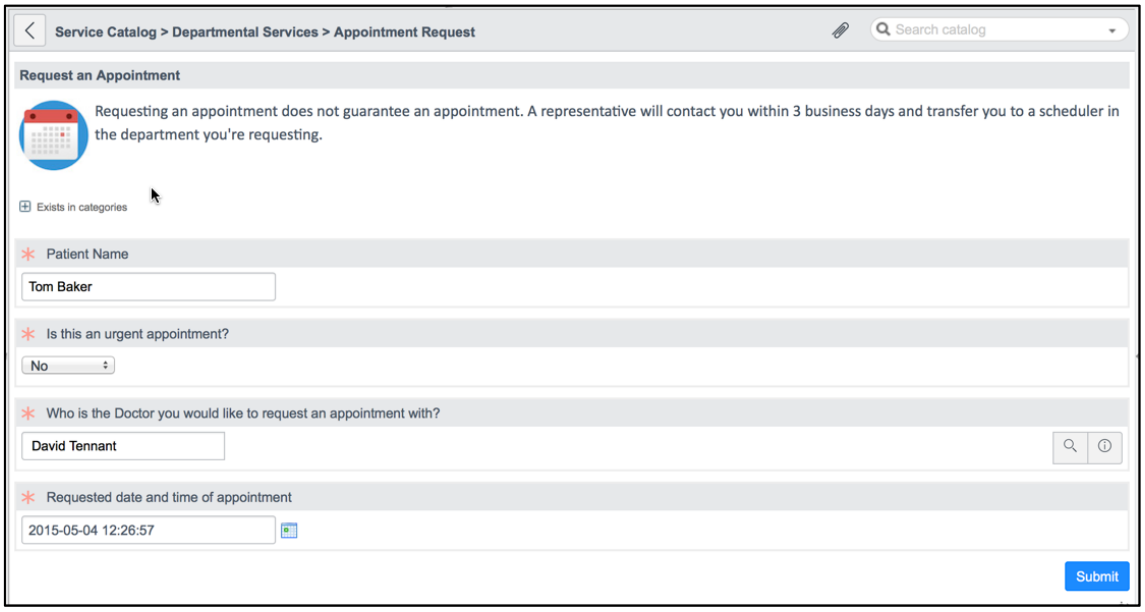
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Lab Success Verification

1. Navigate to **Self-Service > Service Catalog > Departmental Services**.
2. Select **Appointment Request**.



3. Click **Appointment Request** and you should see the form below.



4. Fill out the form and **Submit**.

Progress Report

1. Navigate to **Lab Management> Report Lab Progress**.
2. Click **I am done!**

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Lab Goal

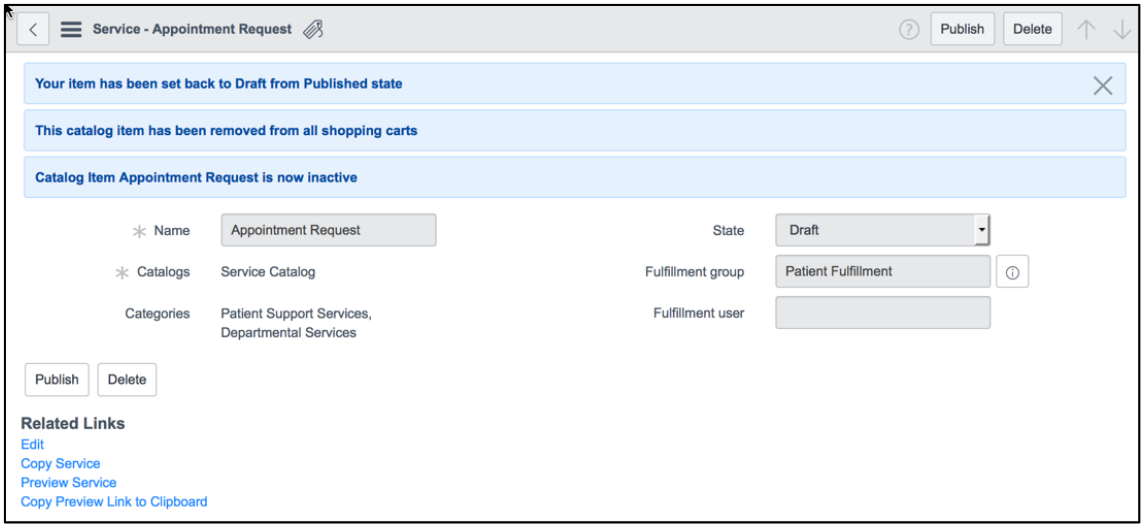
This lab will teach you how to:

- Unpublish a Service
- Edit a Service
- Limit Service Availability
- Make a Service Available in multiple Categories
- Expire a Service
- Copy a Service

Lab 3.2
Managing a Service

Unpublish a Service

1. Continue to impersonate **Lucius Bagnoli**.
2. Navigate to **Patient Support Services > Services > Appointment Request**.
3. Click the **Unpublish** button on the header and your screen should match below.



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Edit a Service

1. On the **Appointment Request Service** click the **Edit** link under **Related Links** and make the modifications listed below.

2. Add additional questions with the properties below.

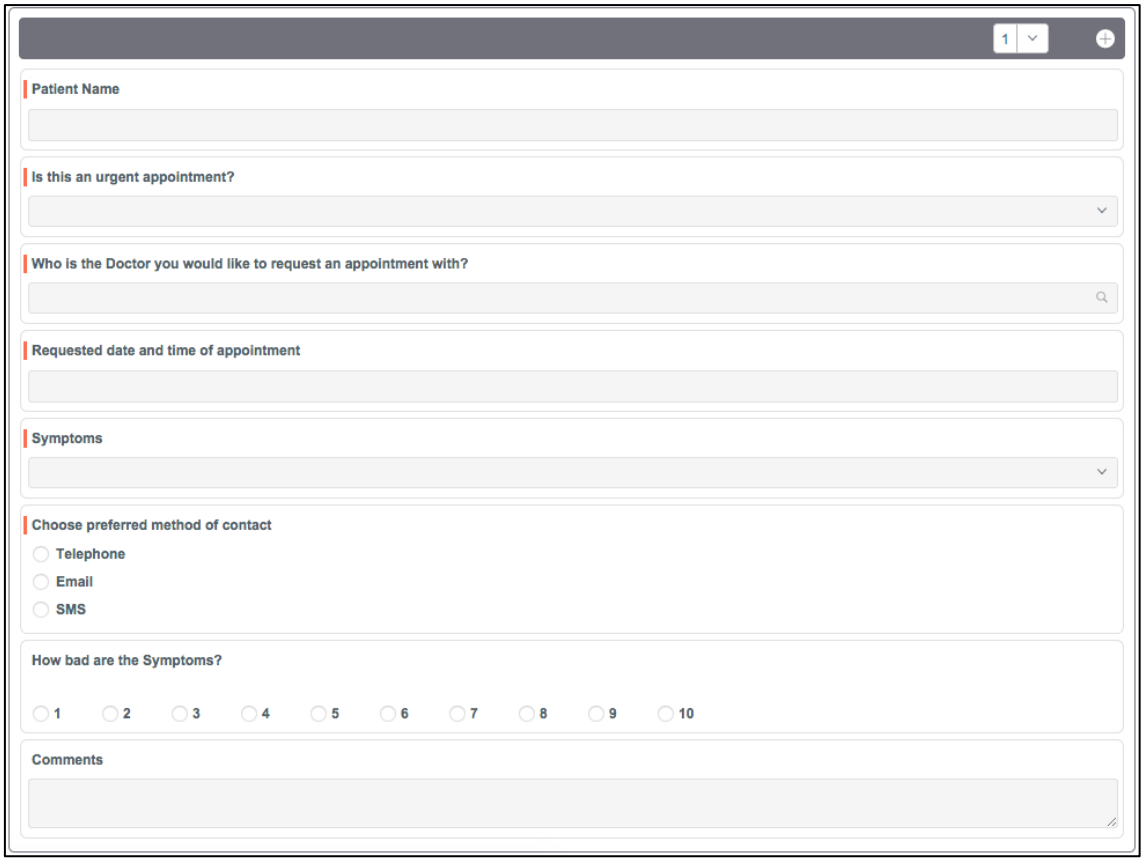
   Question Type: **Select Box**
   Question: **Symptoms**
   Mandatory: **Always**
   Options/Choices: **Sniffles, Flatulence, Headache**

   Question Type: **Multiple Choice**
   Question: **Choose Preferred method of contact**
   Mandatory: **Always**
   Options/Choices: **Telephone, Email, SMS**

   Question Type: **Numeric Scale**
   Question: **How bad are the Symptoms?**
   Help Text: **10 (Extremely bad) to 1 (Minor)**
   Default: **1**
   Min: **1**
   Max: **10**
   Mandatory: **Never**
   Visibility: **Sometimes** show this quest, when **all** of the following are satisfied: **Symptoms is not <blank>**

   Question Type: **Multiple Line Text**
   Question: **Comments**
   Mandatory: **Never**

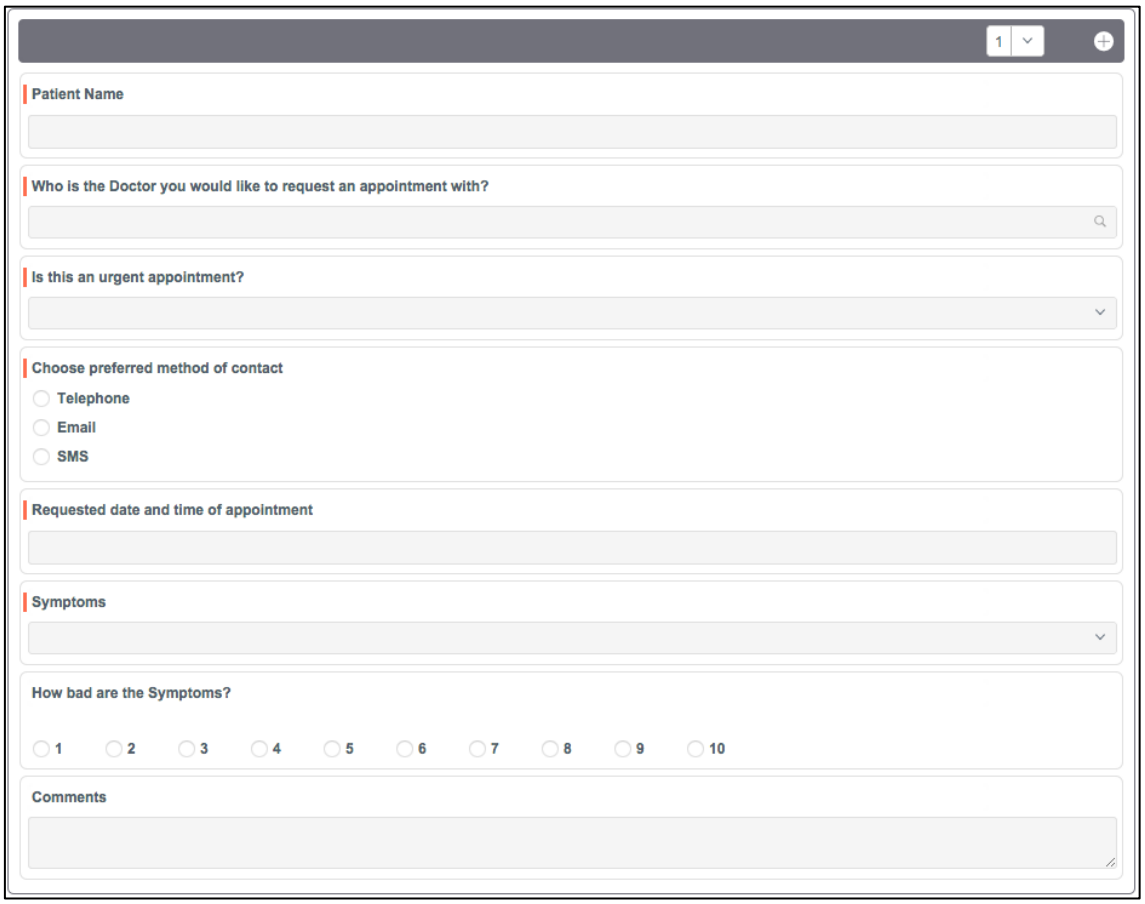
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3. Drag and move the questions to match the below sequence.

   Question 1: **Patient Name**
   Question 2: **Who is the Doctor you would like to request an appointment with?**
   Question 3: **Is this an urgent appointment?**
   Question 4: **Choose preferred method of contact**
   Question 5: **Requested date and time of appointment**
   Question 6: **Symptoms**
   Question 7: **How bad are the Symptoms?**
   Question 8: **Comments**



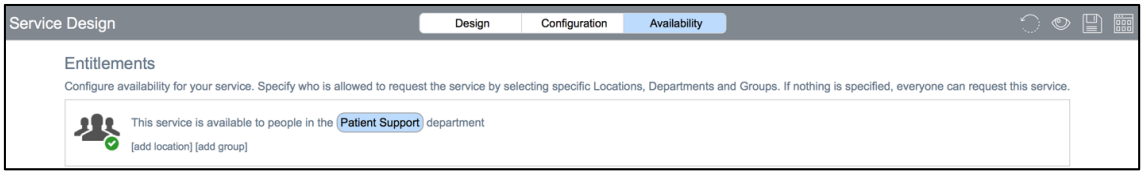
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Entitlements and Category Placement

1. Click the **Availability** button along the top and make the **Appointment Request** only available to people in the **Patient Support Department**.

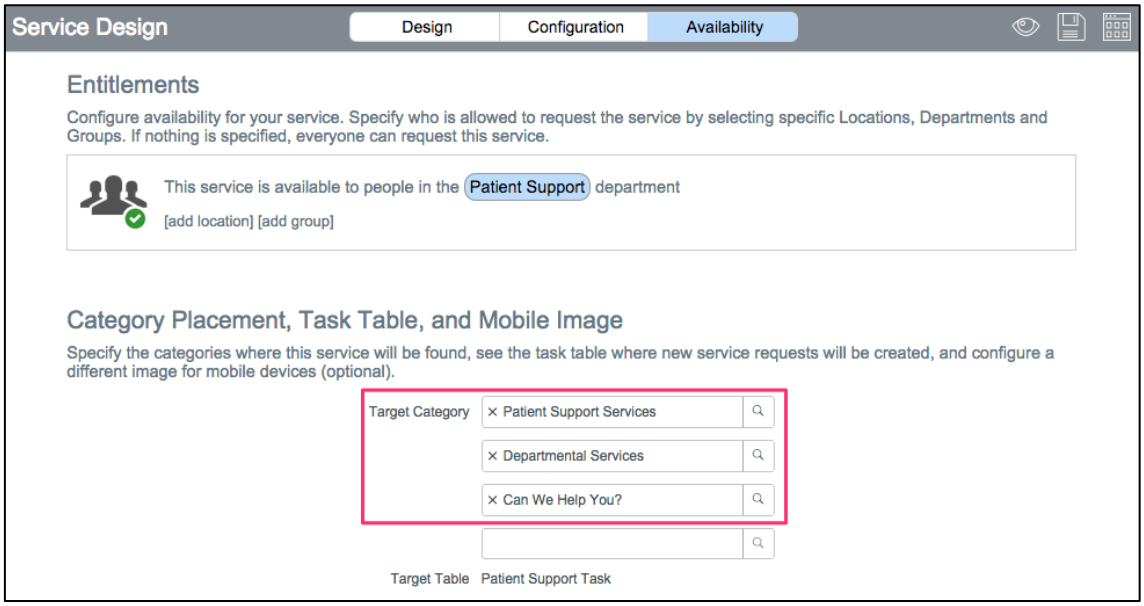
2. Click on the **[add department]** link.

3. Select the **Patient Support** department.



4. Scroll down to the **Category Placement, Task Table, and Mobile Image** section.

5. Add **Can We Help You?** Under the **Target Category** field.

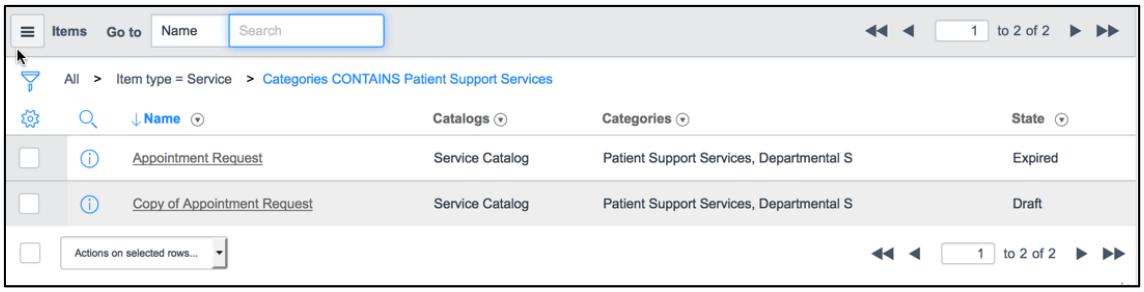


6. Click the **Save** icon.

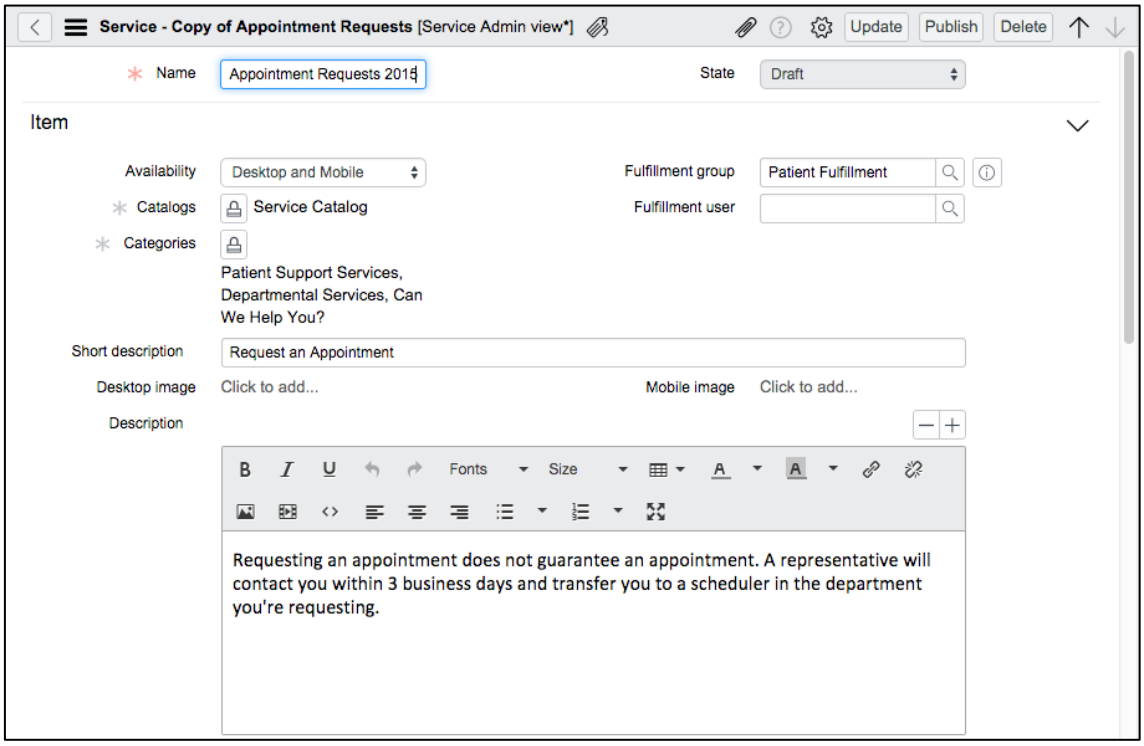
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Copy a Service

1. Navigate to **Patient Support Services > Services > Appointment Request**.
2. Click **Copy Service** under **Related Links**.
3. Click on **Copy of Appointment Request**.



4. Change the name to **Appointment Request 2015**.
5. Click **Update**.

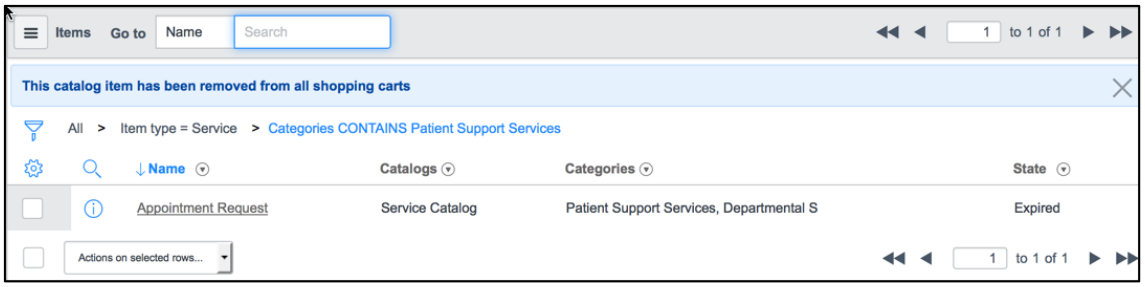


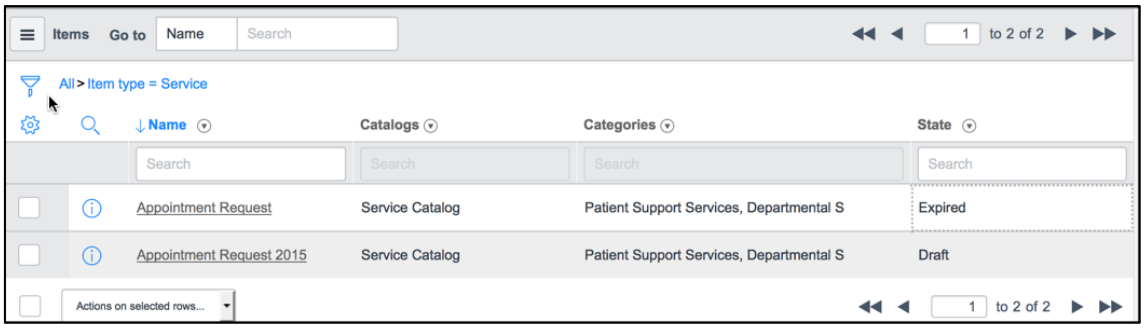
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Expire a Service

1. Impersonate **Lucius Bagnoli** navigate to **Patient Support Service > Services > Appointment Request** and click **Publish**.

2. You should now see the **Expire** button at the top, click it.





Progress Report

1. Navigate to **Lab Management> Report Lab Progress**.

2. Click **I am done!**

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Lab Goal

This lab will teach you how to:

- Fulfill a Service using tasks

Lab 4.0
Fulfillment

Fulfillment

1. Impersonate **Gregory House**.
2. Navigate to **Patient Support Services > Open** and click on the **first record listed** and do the following:

   Set the Assigned To: **David Tennant**
   Add Work Notes: **Please complete the request**
   Click **Update**
3. Impersonate **David Tennant**.
4. Navigate to **Patient Support Services > Assigned to me** and click on the **first record listed** and do the following:

   Set the State: **Completed**
   Add Comments: **This request is now complete**
   Click **Update**

Progress Report

1. Navigate to **Lab Management> Report Lab Progress**.
2. Click **I am done!**

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Lab Goal

Using everything from the Labs create a Service and complete one request from the Service. This lab will allow you to utilize everything you learned from each of the Labs:

- Create a Service Category
- Create a Service
- Manage a Service
- Fulfill a Service

Lab 5.0
End to End

End to End

Scenario 1 (Service Category)
Dr. Cuddy has asked for a new Service in the Service Catalog to handle Sacred Heart Hospital equipment research, procurement, and disposal requests. She has asked that you submit a request for this and gave you the following requirements. You need a new Category in the catalog called **Hospital Equipment Services** to be managed by the **Procurement Group**. **Gregory House** is going to be the manager to designate the fulfillers and editors of the new Service.

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Scenario 2 (Create a Service)
You submitted the request for a new Service Category and need the **admin** to ***publish*** the new category to continue building the Service.

The admin informed you the new Service Category has been published and Dr. Cuddy emailed you the first Service to add.

> From Dr. Cuddy:
>
> Please create a new Service for Hospital Equipment Research. It can be available for anyone in the organization. Here is a list of things we want to capture:
>
> - Equipment Name (required)
> - Equipment Manufacture (required)
> - Equipment Contact (internal user to contact with questions, required)
> - Is the research needed ASAP (required)
> - Date research needed by (only required if they say yes to the research needed ASAP)
> - Cost Center (where the money will come from for research such as Doctor, Nurse, or Patient and this is required)
> - Comments field (required)
>
> We also want to make sure we thank the user for submitting the request and be sure they all route to the Procurement Group. I trust you to review the form and Publish it to the catalog.
>
> Thanks, Dr. Cuddy

Scenario 3 (Modify a Service)
Dr. Cuddy emailed you again saying the form looks great and works, but it would be nice to be able to Access it from the "Can We Help You?" Category in the catalog. She also asked that you add a scale to the form from 1 to 10 on how badly they need the equipment. One more note from her indicated there should be some help text indicating 10 is cant live without it and 1 is nice to have.

Dr. Cuddy emailed again asking to make sure you published the changes because she can't find the form now since emailing you.

Scenario 4 (Fulfillment)
You were sitting at your desk thinking about how awesome people think you are for begging IT to get ServiceNow and thought, "I should request the hospital research getting one of those new sleep number adjustable hospital beds so you can catch a few winks between being awesome". You fill out the new request your just built but need to assign it to Bob Kelso to complete.

Progress Report

1. Navigate to **Lab Management> Report Lab Progress**.
2. Click **I am done!**

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