knowledge17

WORK at LIGHTSPEED™

# Using ServiceNow Express to Automate Business Processes (IT Purchasing and Approvals)

SHAWN P. DELL
*IT OPERATIONS MANAGER*
Yarde Metals Inc.

© 2017 ServiceNow All Rights Reserved

servicenow

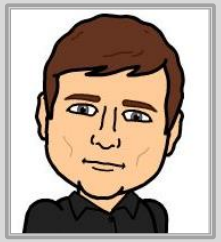
# Agenda

- Objective: Extending ServiceNow Express to implement other business processes
- IT Purchasing and why this is where we started
- How we went about implementing IT Purchasing in ServiceNow Express
- How ServiceNow Express changed Yarde Metals and how we purchase
- Next Steps given what we have implemented and learned
- Takeaways and Lessons Learned


© 2017 ServiceNow All Rights Reserved

# Speaker Introduction





**NAME:** Shawn P. Dell

**TITLE:** IT Operations Manager

**FUNCTION:** IT Operations, Technology Integrator, and Customer Support

**COMPANY:** Yarde Metals Inc.

**EXPERIENCE:** 4 years with Yarde Metals. 22 years IT Operations roles. 2.5 years using/administering ServiceNow Express

**EXPERTISE:** IT Operations Management, Service Delivery Management, End User Support/Advocacy, Systems Integration

**ACHIEVEMENTS:** Full rollout and adoption of ServiceNow Express in Yarde Metals (Incident, Problem, Change, Asset Tracking, Knowledge Base, IT Purchasing, method to request printer toner direct from vendors, and many more)



© 2017 ServiceNow All Rights Reserved

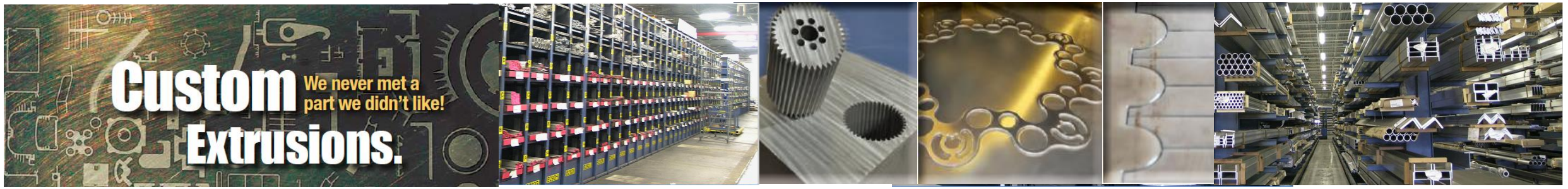
# About Yarde Metals Inc.

**NAME:** Yarde Metals Inc.

**INDUSTRY:** Manufacturing

**Market Focus:** Yarde Metals carries a multi-metal inventory specializing in aluminum, stainless, carbon steel and brass in a wide range of standard, unique and hard to find sizes. We offer a variety of modern processing services to ensure quick turnarounds and fast deliveries.

**COMPANY'S PRIMARY PRODUCTS/SOLUTIONS:** Bar, sheet, and plate forms, custom extrusions, precision waterjet and plasma cutting, next day delivery





© 2017 ServiceNow All Rights Reserved

# “Virtual” Speaker Introduction





**NAME:** “Frank”

**TITLE:** Technical Support Analyst, Help Desk Hero, & “The Face of Yarde IT”

**FUNCTION:** He’s the guy that gets all the calls and questions from everyone, as well as buys most things and reconciles all the purchases each month

**NAME:** “Frank”

**TITLE:** Technical Support Analyst, Help Desk Hero, & “The Face of Yarde IT”

**FUNCTION:** He’s the guy that gets all the calls and questions from everyone, as well as buys most things and reconciles all the purchases each month



© 2017 ServiceNow All Rights Reserved

# IT Purchasing, Why it Was, Um, “Difficult”

- Method to make a request
  - Frank had to advise each and every time how to request
  - Little to no consistency on “how” for different things



- Approval requirements
  - Frank then needed to figure out who should approve, depending on what the thing was
- Getting the Approvals
  - Chase people down to approve
  - Frank sometimes chose the wrong person to approve
  - Get “official” approval (email?, word of mouth?, what was official?)
- Once all that was done; then we could order whatever was needed


© 2017 ServiceNow All Rights Reserved

# Yarde's Approach to Solving This, Um, "Difficulty"

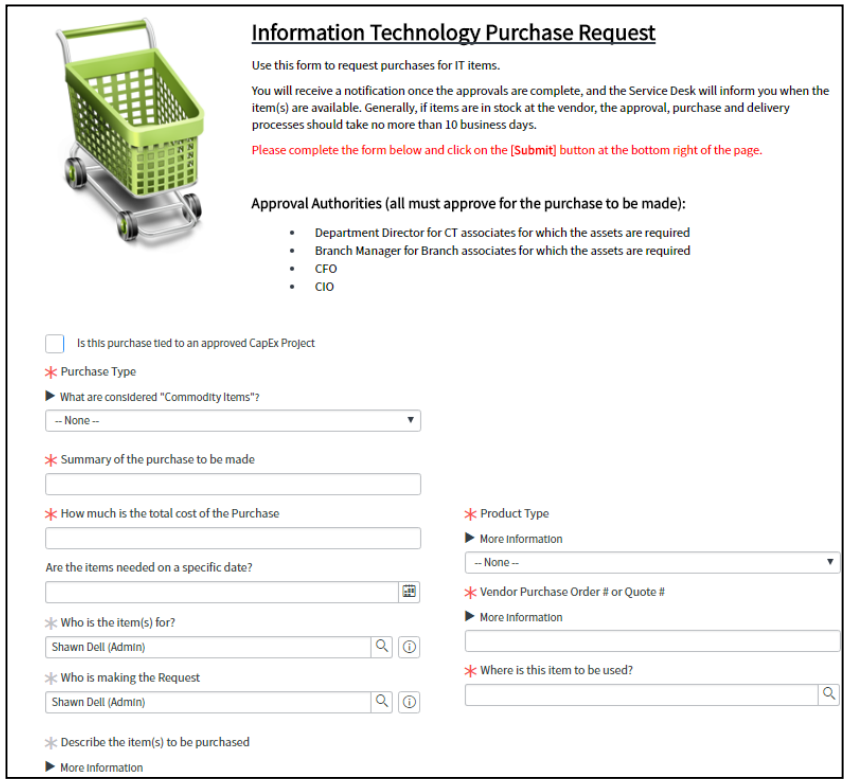
- Define the actual process, both of requesting and approving
- Define who needs to approve and when
- Define what data is actually needed to enable the decision to purchase
  - Who needs what data?
  - Different for different approvers?  (e.g. Manager, IT, CIO, CFO, President, etc.)
- Define who will purchase and at what $ amounts, once approved



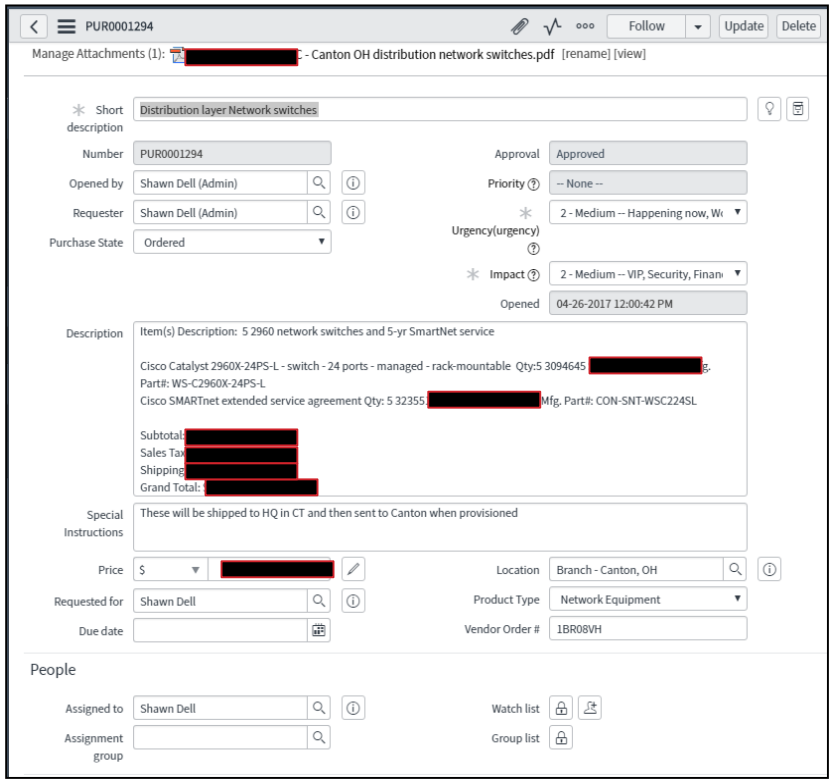

© 2017 ServiceNow All Rights Reserved

# Solution at a Glance

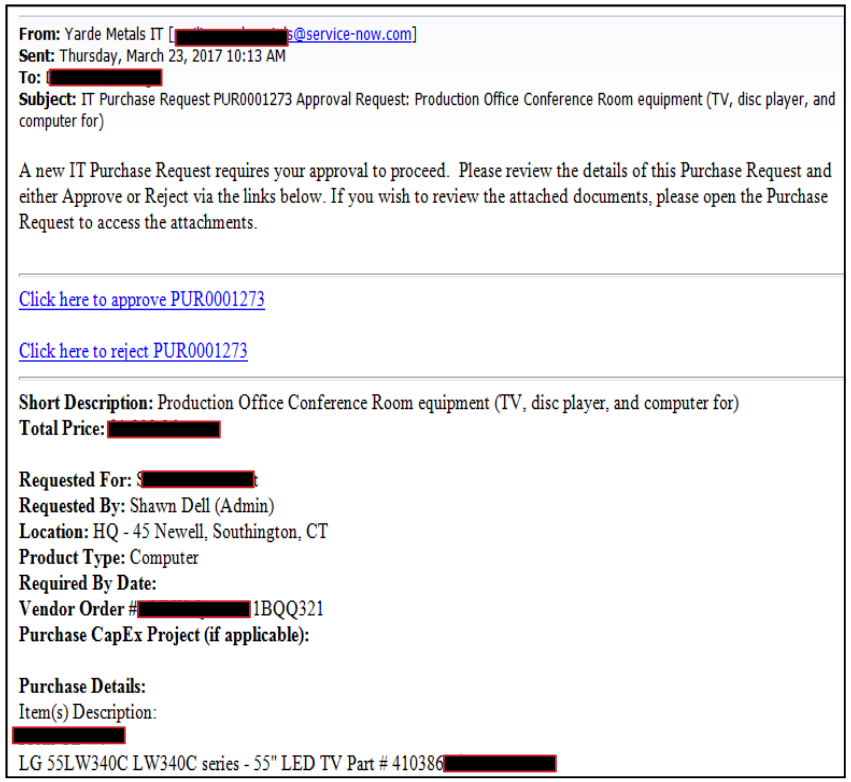
We Decided to Leverage ServiceNow Express to Implement, and it Worked!




Request Form (Record Producer)




Fulfillment Form (Record Form)




Approval Email (Notification)


© 2017 ServiceNow All Rights Reserved

# Now that We Have the Business Process, How Can We Use ServiceNow Express to Implement?!

- Approach for ServiceNow Express is like building blocks of different shapes
  - Tables, Applications, Modules, Forms, UI Policies, Record Producers, etc.

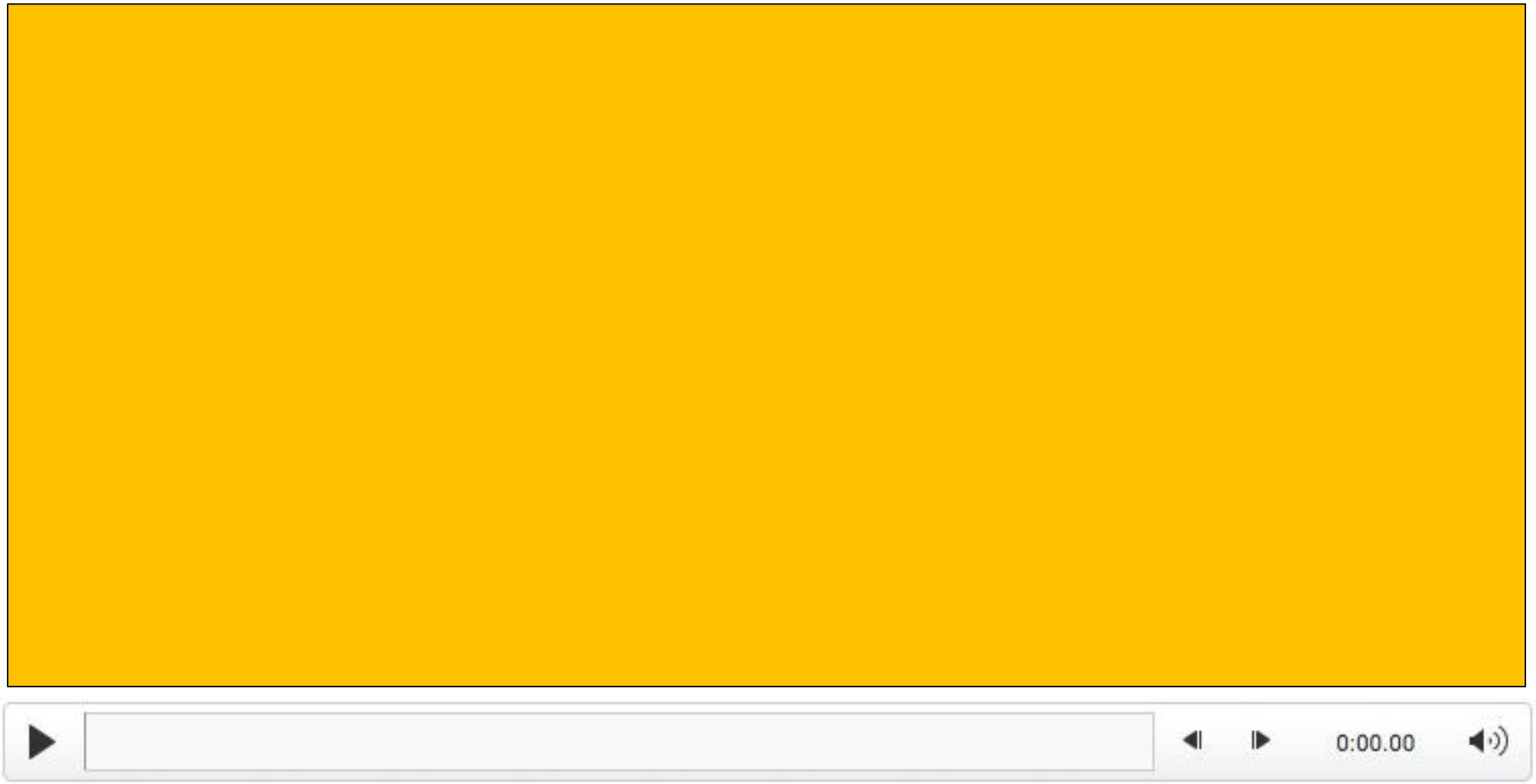
- Too much detail to present here, but see Forum Post on https://express.servicenow.com/support/forums/ Titled “Knowledge17 BRE4180: Approach to build Custom Applications in Express”

- Outlines the building blocks to use and in which order

- Includes tips and tricks for some smaller applications features that might be missed
  - Setting form fields to Read-Only when record is closed (i.e. Active = False)
  - Business Rules for setting Active to False when “state” is closed


© 2017 ServiceNow All Rights Reserved

# Solution – Demo





© 2017 ServiceNow All Rights Reserved

# Value Outcomes



| | BEFORE | AFTER |
|---|---|---|
| Time to get approvals | Days to, sometimes, weeks | Hours to, sometimes, minutes! |
| Time from Request to Order | Days to, sometimes, weeks | Hours to, sometimes, minutes! |
| Opened conversations about clearly defining processes and approvals | Business units were not interested in defining this; they saw no benefit | Business units now asking how to do this, and referring to using ServiceNow to implement |
| Frank, Requestor & Approver(s) expending valuable time to navigate the process | 2+ person-hrs per request | 20-ish person-mins per request |

Purchase Requests in 2nd half of 2016 = 133

Annual Time Savings: at least 443 hrs per year!


© 2017 ServiceNow All Rights Reserved

# Lessons Learned

1. You must have the business process pretty well defined before you start.  You will make changes as you implement though, be ready for it!

2. “Task” is everything is ServiceNow Express.  If you start with “Task” you will be able to do just about anything you want

3. ServiceNow Express provides building blocks (Task table, Form Designer, Record Producers, Approval Rules, Notifications, Business Rules, UI Policies, etc.) you need to know how to use each one to build from end to end

4. Try and anticipate the general and specific needs (e.g. “Purchase”) and then extend to the specific, if you can (e.g. PurchaseIT, PurchaseMRO, Purchase-Maint, etc.)

5. If it works, and is simple and fast, people will use it!


© 2017 ServiceNow All Rights Reserved

# Our Next Steps

- Since the structure was built with a multiple tier method in mind, extend “Purchase” and “PurchaseIT” to “Purchase- Maintenance” and “Purchase-Non Product Purchasing”
- Look for other processes to automate like Purchasing
- See how fast the other business units come to us for way to automated *their* business processes
  - HR: auto notification to parent company on termination
  - MetalTraq (our ERP system) Enhancement requests (extended Change)
  - Request for Confidential Information (many approvals for different types of data)
  - Quality Deptartment; tracking of Corrective Actions


© 2017 ServiceNow All Rights Reserved

# Top Takeaways

1

Collaboration with business units is paramount to success

2

Using “Task”, can implement many business process requiring approvals and other process steps

3

Successfully implementing 1 or 2 business processes will open the flood gates, and make Frank really happy!





© 2017 ServiceNow All Rights Reserved

## Take the Survey

Please take a moment to complete a session survey in the Knowledge17 app.

# Thank You


**Shawn P. Dell**

*IT Operations Manager*

Yarde Metals Inc.

**“Frank”**

*“The Face of Yarde IT”*

Yarde Metals Inc.





© 2017 ServiceNow All Rights Reserved

# Q & A

SHAWN P. DELL
*IT OPERATIONS MANAGER*
Yarde Metals Inc.

“FRANK”
*“The Face Of Yarde It”*
Yarde Metals Inc.



© 2017 ServiceNow All Rights Reserved