knowledge14®

April 27–May 1, 2014 • Moscone Center • San Francisco, CA

Lab Guide

Service Catalog 201:

Create a Consumer Experience

Michael Brown & Eric Hemmer

Lab instance: https://<<name>>.lab.service-now.com

Login / Passwords:

admin / Knowledge14

itil / Knowledge14

employee / Knowledge14

Lab Goal

Facilities likes what IT has done with their service catalog, but wants a separate catalog of their own apart from the Service and Technical catalogs.

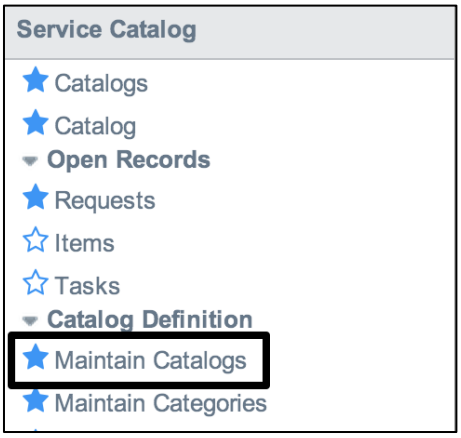
Lab 1
Utilize a Separate Catalog for Facilities

Login to Your Training Instance

1. Login to the provided training instance URL using the **admin** credentials on the cover.

Locate the Facilities Catalog

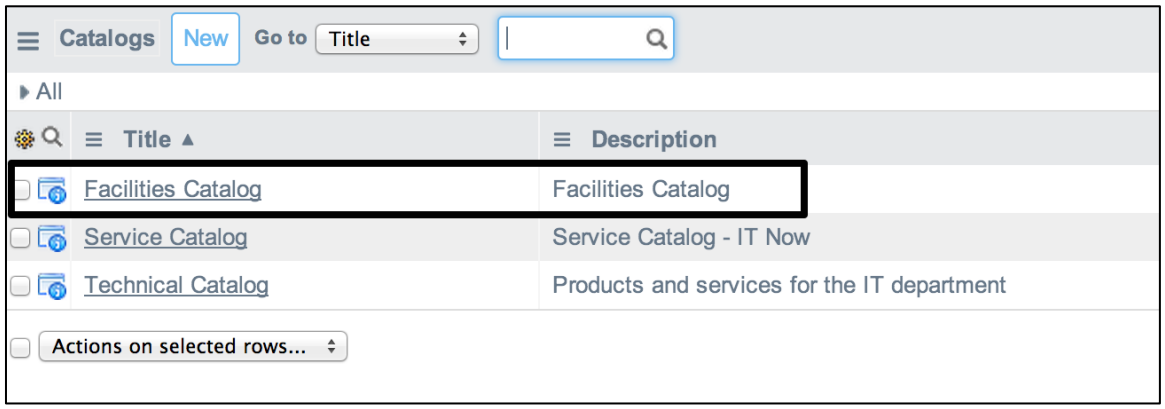
1. In the **Left Navigation Pane**, click **Service Catalog** to expand the Service Catalog application.
2. Click the **Maintain Catalogs** module to display this application in the main pane of the browser.



NOTE: In subsequent labs, these steps are abbreviated to **Application Name > Module Name**.

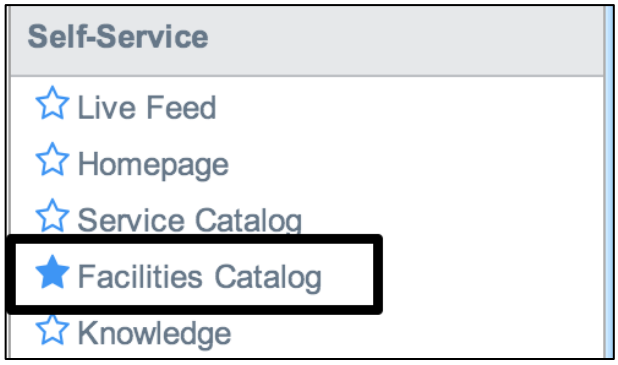
©2014 ServiceNow, Inc. All rights reserved.

3. Note with the **Facilities Management** plugin activated, you get a separate Facilities Catalog from the primary **Service Catalog** and **Technical Catalog**.



Note: The Facilities Management plugin gives you a separate out-of-box Facilities Catalog. If you want to create additional catalogs, this is where you can create them.

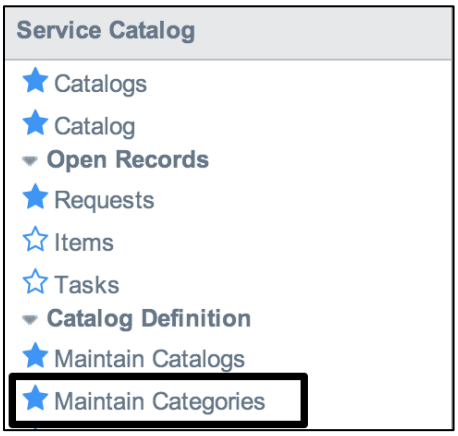
4. Also, notice that the **Facilities Catalog** is listed as a module under the **Self-Service** application.



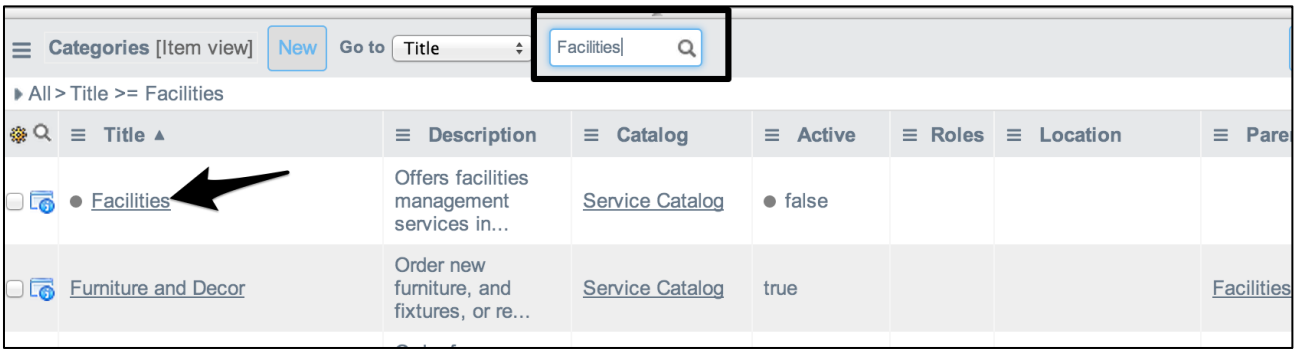
©2014 ServiceNow, Inc. All rights reserved.

Associate Additional Categories to the Facilities catalog

1. Go to **Service Catalog > Maintain Categories.**

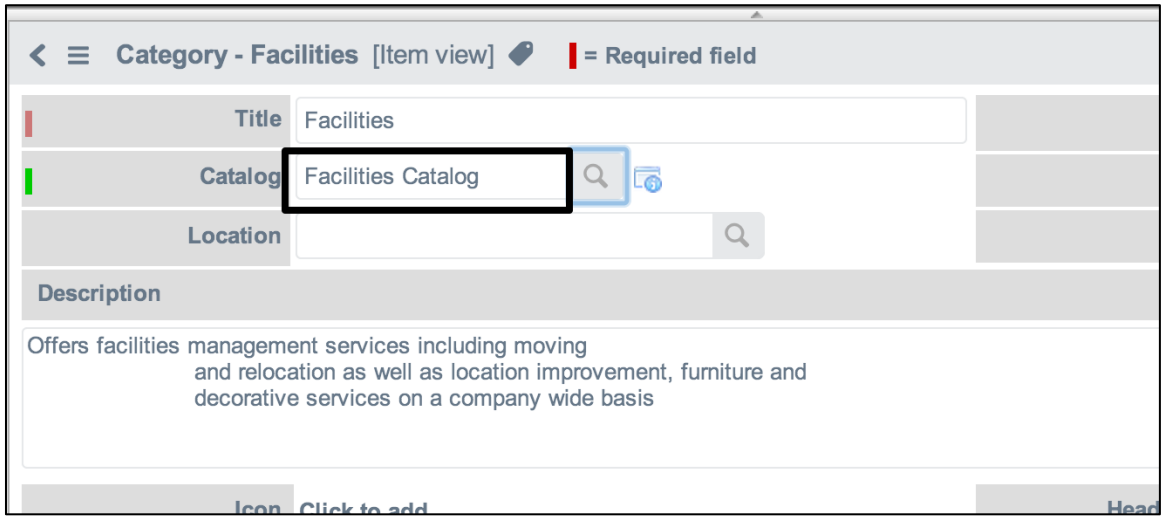


2. Find the Category Title **Facilities** and click the link.



©2014 ServiceNow, Inc. All rights reserved.

3. Set **Catalog** to **Facilities Catalog.**

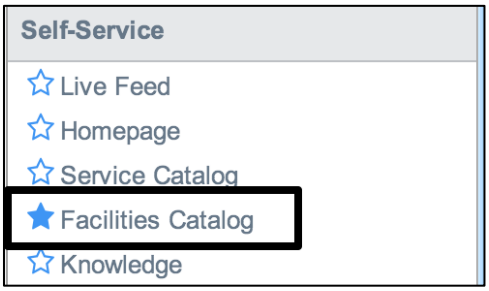


Note: The **Facilities** category actually has 9 different child categories associated to it. These can be seen in the **Categories** related list at the bottom of the "Facilities"

4. Click **Update**.

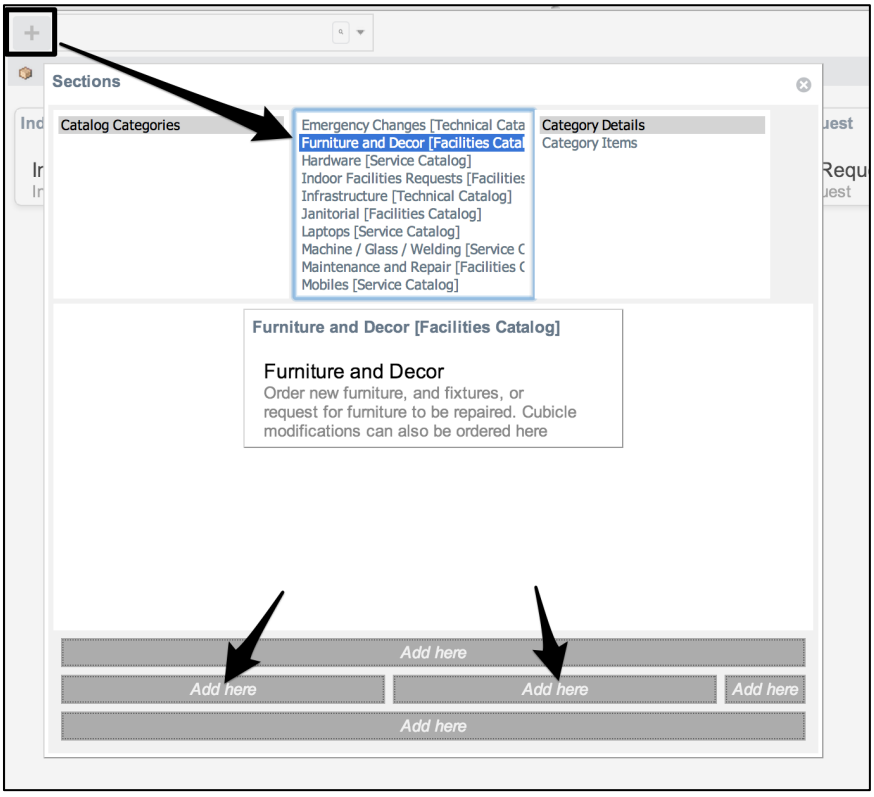
Populate the Facilities Catalog with Additional Categories

1. Go to **Self Service > Facilities Catalog** and click the **Facilities Catalog widget**.

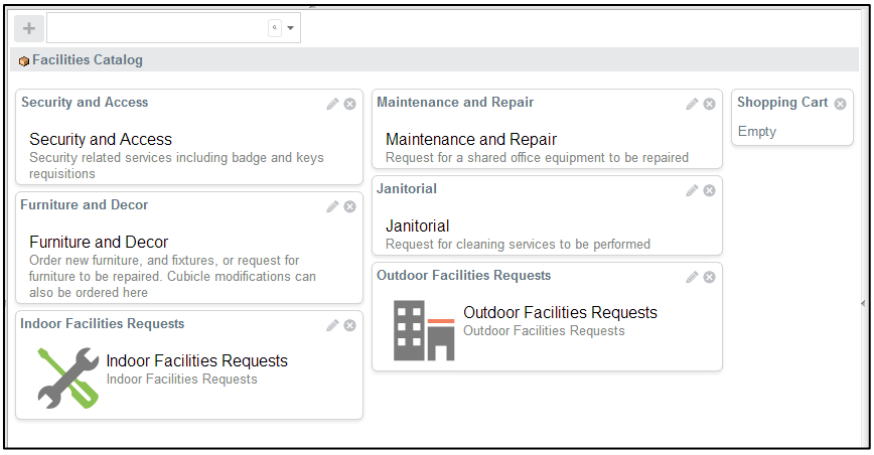


©2014 ServiceNow, Inc. All rights reserved.

2. Click the **+** (plus) icon in the top left of the page.



3. Add the following categories, to the dropzones show below: **Security and Access**, **Furniture and Décor**, **Janitorial**, **Maintenance and Repair**, **Shopping Cart**.



Close the popup window.

©2014 ServiceNow, Inc. All rights reserved.

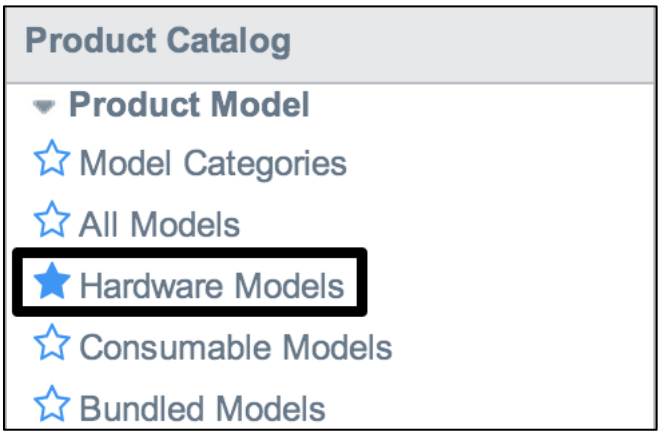
Lab 2 Goal

Facilities wants to list some of their hardware, tracked in the product catalog, as catalog items that people can order. We need to link and create catalog items for these hardware models in the service catalog.

Lab 2 Create a Product Catalog Item

Create a Product Catalog Item

1. Go to **Product Catalog > Hardware Model**

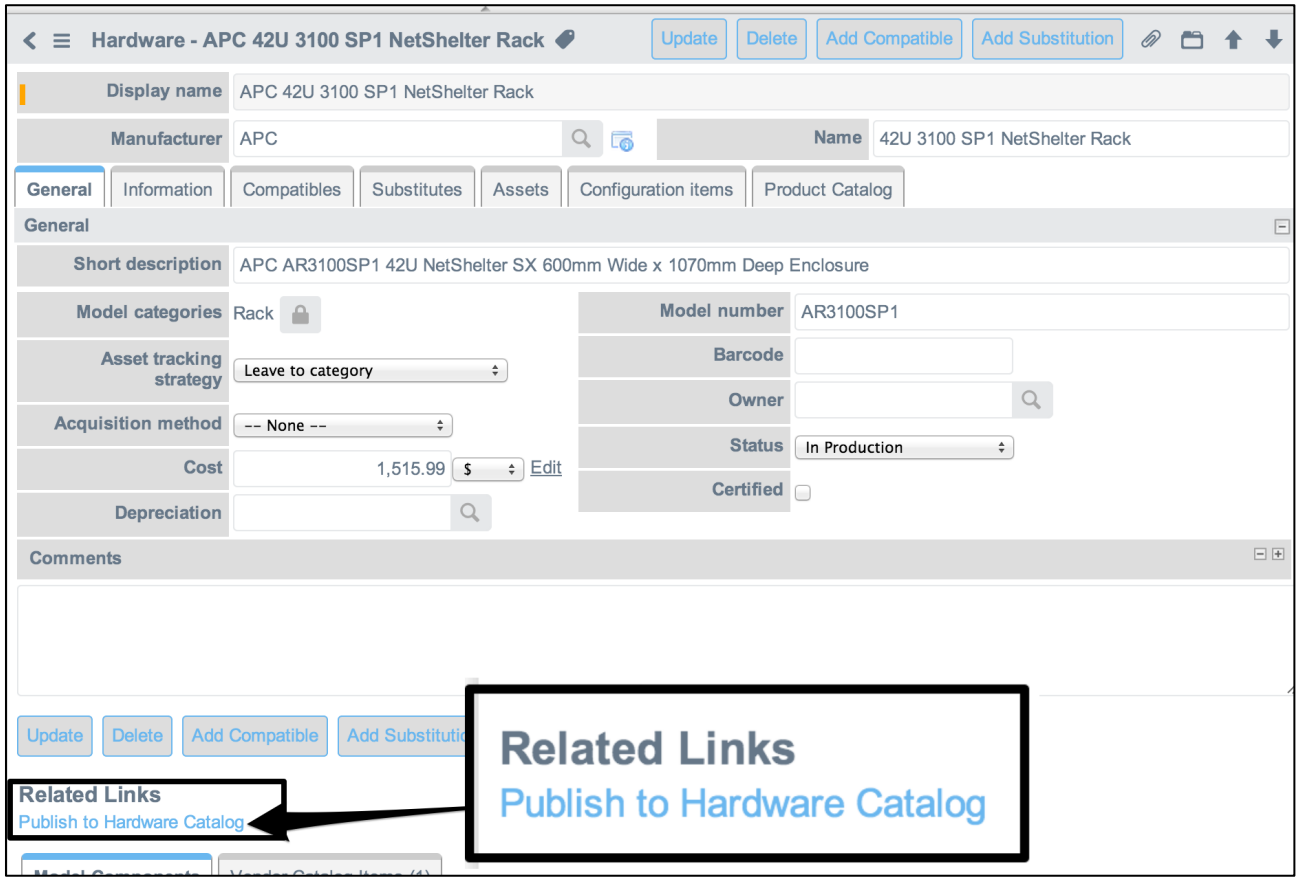


2. Find the Hardware Model **42U 3100 SP1 NetShelter Rack** in the list and click the link to open the record.

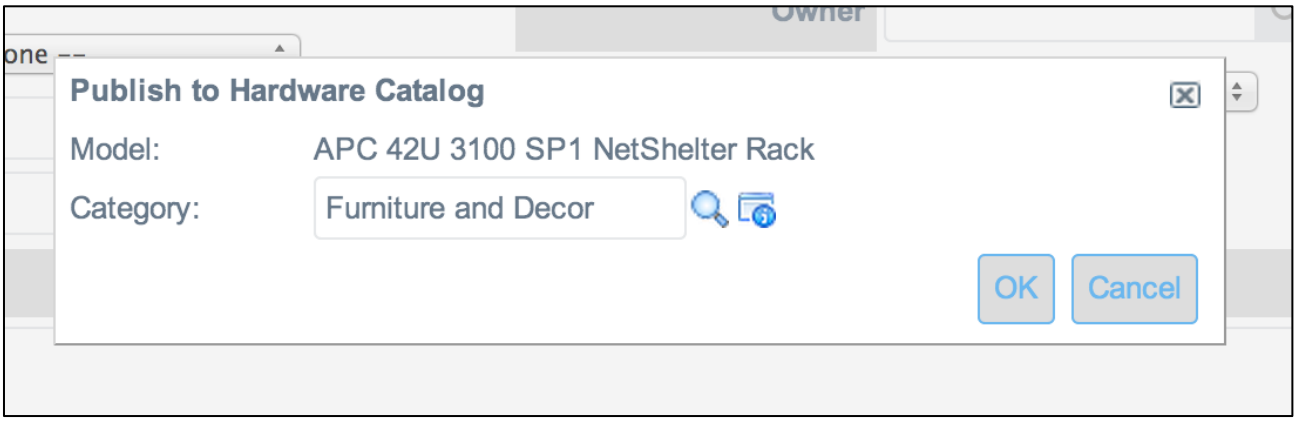
> **Note**: While on this Hardware Model's form, take note of the **Model number**, **Cost**, and **Short description** on the General form section tab. And the **Description** on the Product Catalog form section tab. This information will follow to the newly created Catalog Item.

©2014 ServiceNow, Inc. All rights reserved.

3. Click the **Publish to Hardware Catalog** related link.



4. Set category to **Furniture and Decor** and click **OK**.



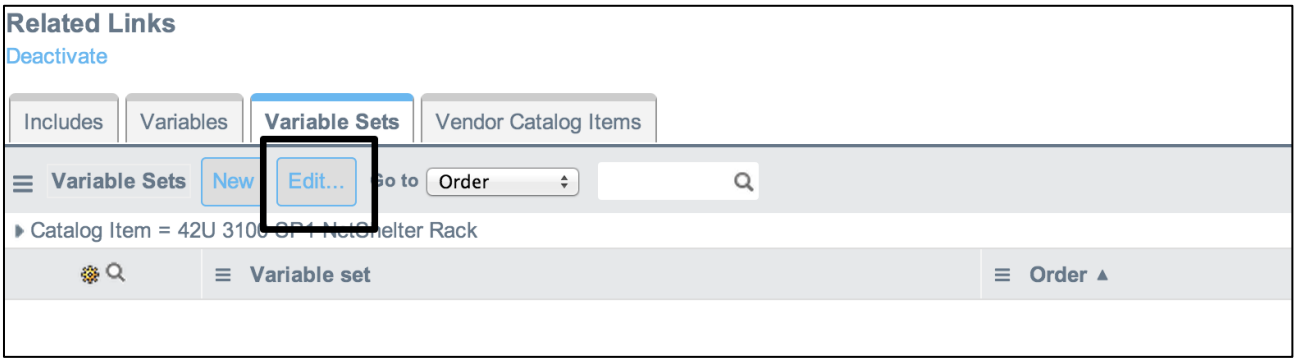
©2014 ServiceNow, Inc. All rights reserved.

5. After clicking Ok, it should return you to the Hardware Catalog Item created.

> **NOTE**: Some fields like **Model**, **Product Id**, **Cost**, **Short description** and **Description** are read-only.
>
> These fields originate and are maintained on the hardware model. Any modification to these fields needs to be made on the hardware model.

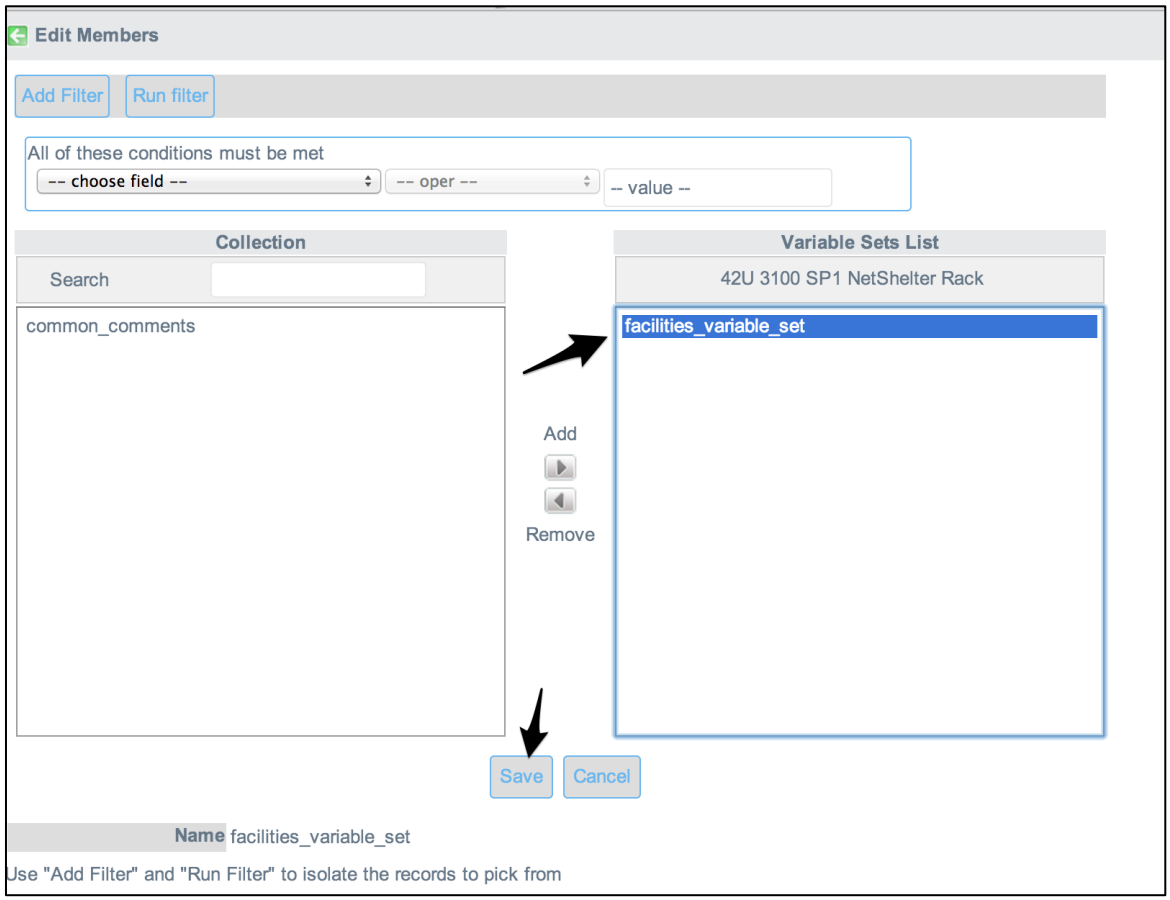
Add a variable set to your hardware catalog item

1. In the Variable Set related list click **Edit** to add a variable set.



©2014 ServiceNow, Inc. All rights reserved.

2. Select **facilities_variable_set** from **Collection** and click **Add** to move it to **Variable Sets List** then click **Save**.



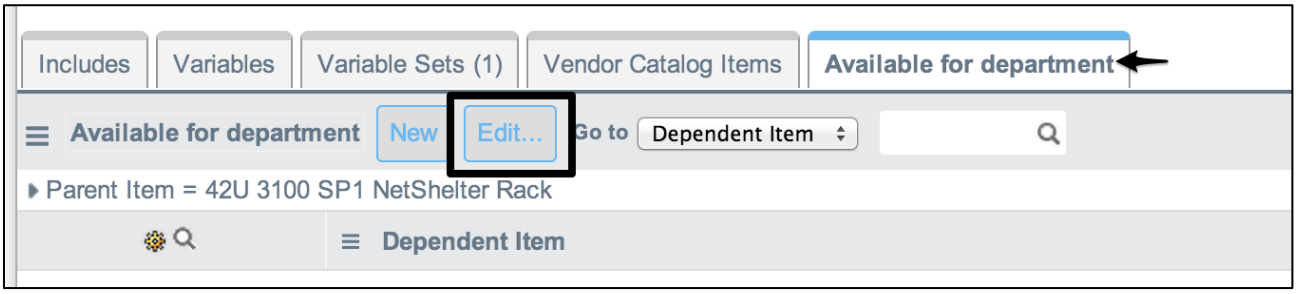
Apply security on this hardware catalog item.

1. Only allow the IT department the ability to view this catalog item.

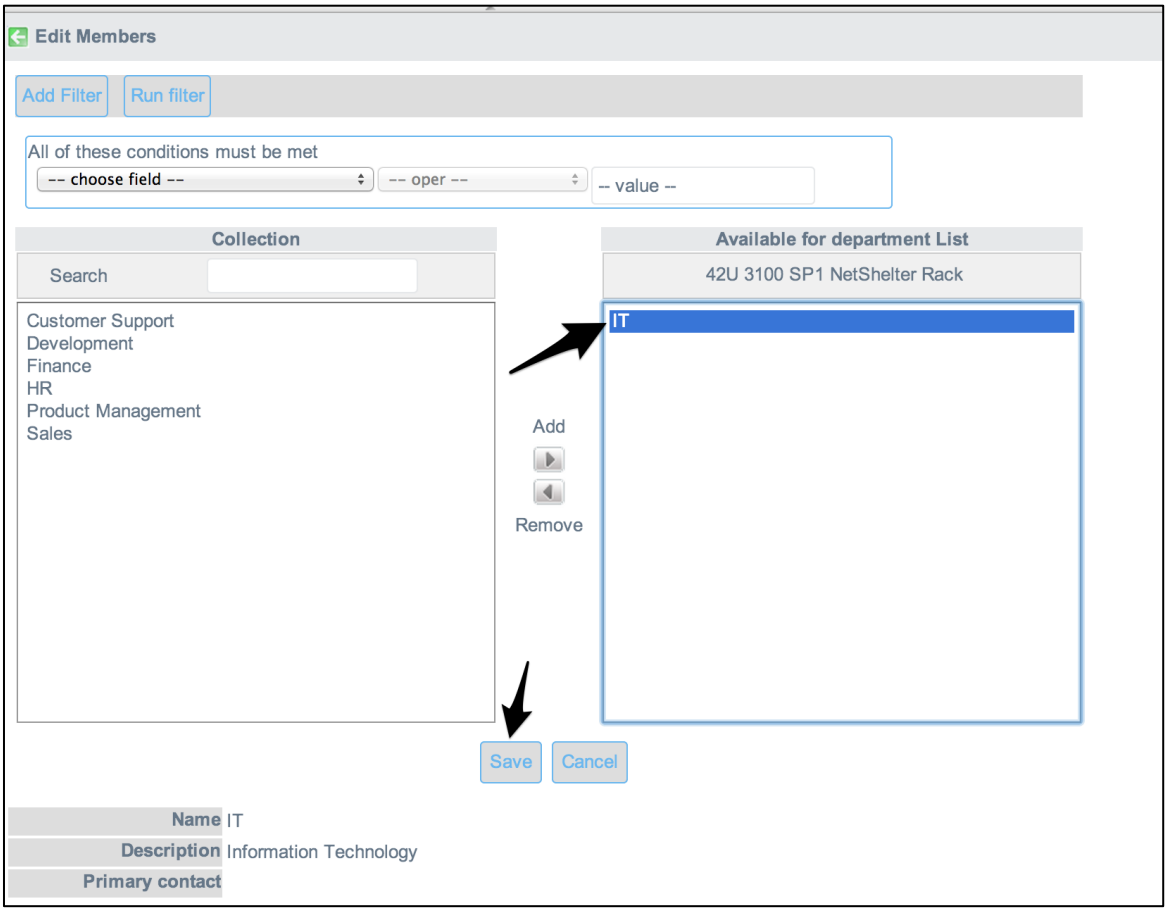
> **Note:** **Service Catalog Access Controls**
> Catalog Items, including product catalog items, and order guides support several ways to control access. First this can be done via role on the catalog item. Catalog items also support related lists for **Available for..** or **Not Available for.. Company**, **Department**, **Group**, **User**, or **Location**.. These will allow you to specify which company, group etc. that can or cannot access this item. Finally, granting or restricting access can be done via a script called an entitlement script. See the link for more details.

©2014 ServiceNow, Inc. All rights reserved.

2. Click **Edit** under the **Available for department** related list.



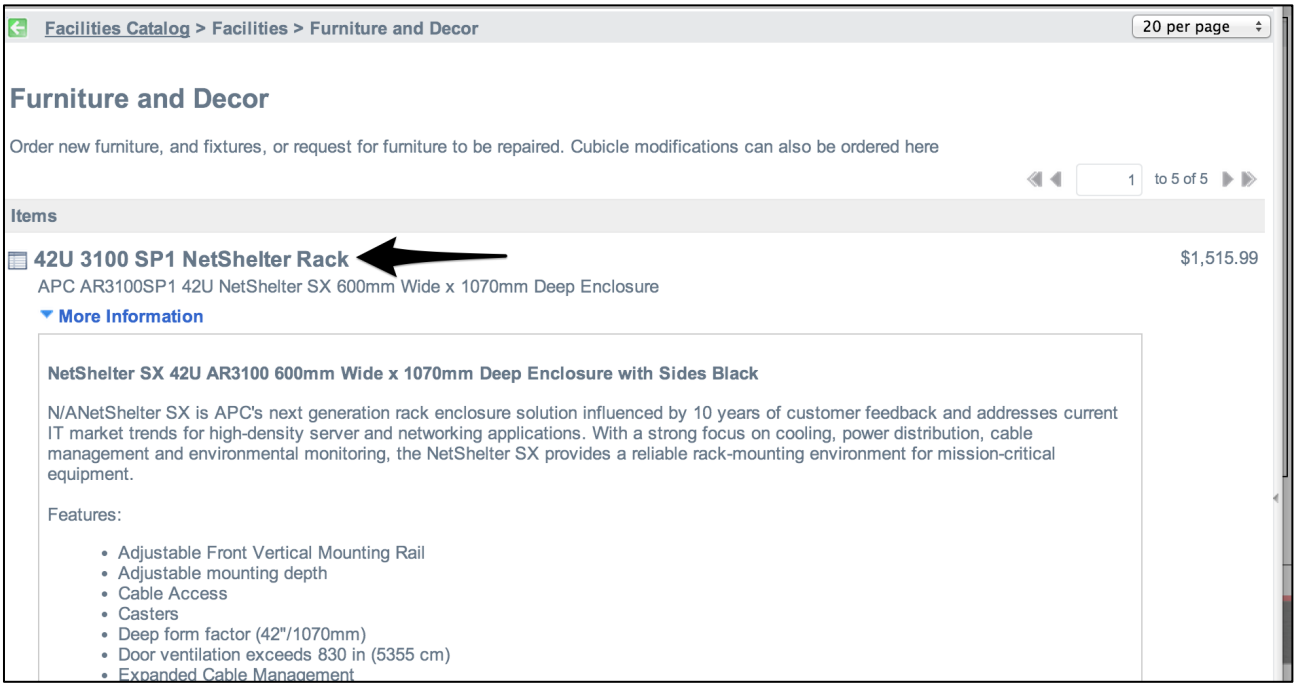
3. Select **IT** from **Collection** and click **Add** to move it to the **Available for department List** then click **Save**.



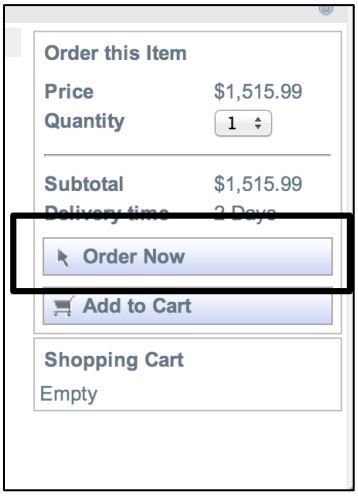
©2014 ServiceNow, Inc. All rights reserved.

Let's go try it out!

1. Go to **Self Service > Facilities Catalog > Furniture and Décor** and click the **42U 3100 SP1 NetShelter Rack** link.



2. Fill in the required variable fields and click **Order Now**.



3. Success! You have submitted a request for your newly created product catalog item.

©2014 ServiceNow, Inc. All rights reserved.

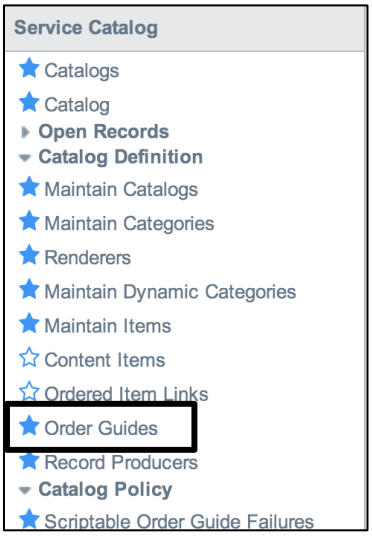
Lab 3 Goal

Your facilities group comes to you and says they have specific new hire onboarding requests that they would like to offer. So you create a facilities onboarding order guide to fulfill these requests.

Lab 3
Create an Order Guide

System Navigation

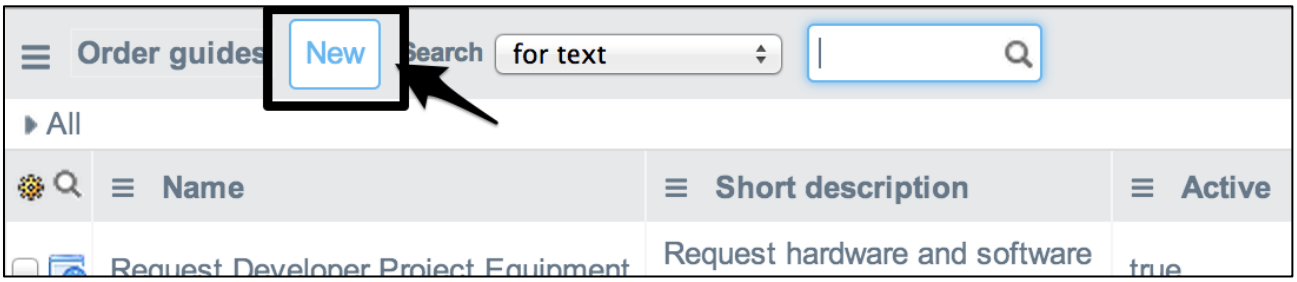
1. Go to **Service Catalog > Order Guides**



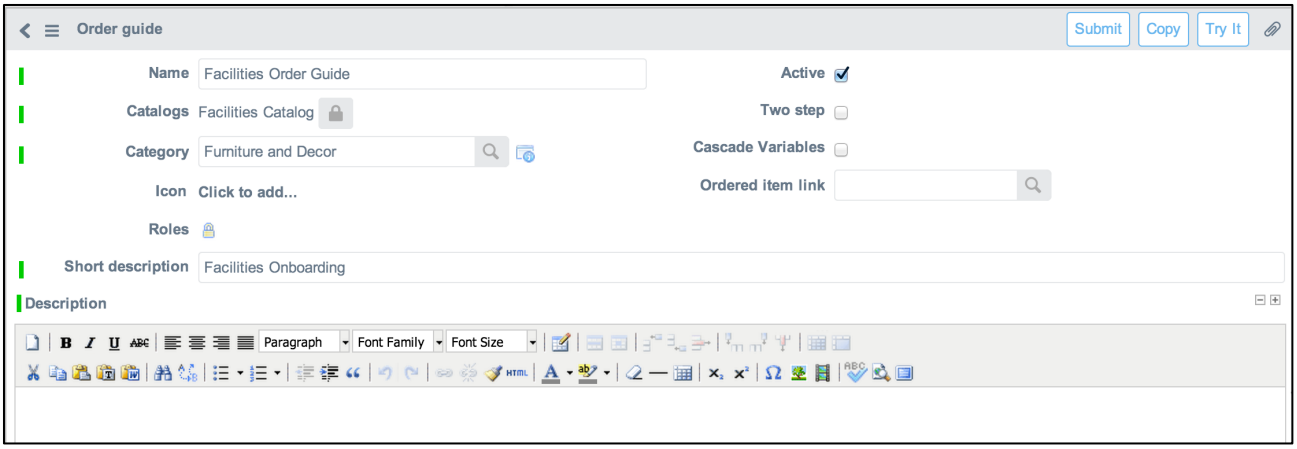
©2014 ServiceNow, Inc. All rights reserved.

Create a New Order Guide

1. Click **New** to create a new order guide with the following information.



Name: **Facilities Order Guide**
Catalog: **Facilities Catalog**
Category: **Furniture and Decor**
Short Description: **Facilities Onboarding**



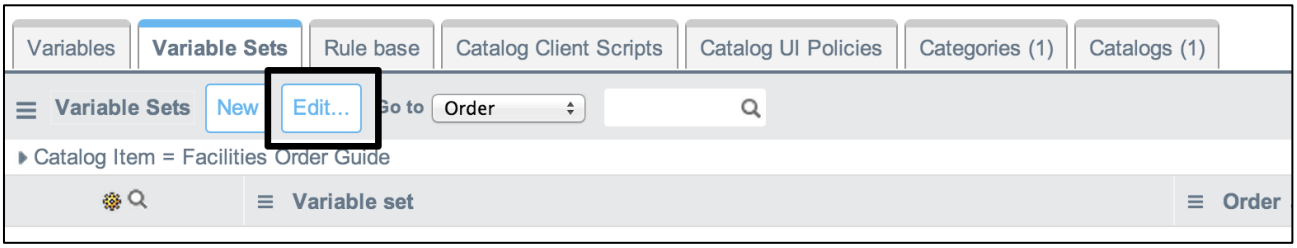
2. Right Click on the header and select **Save**.

©2014 ServiceNow, Inc. All rights reserved.

Let's Add Some Variables

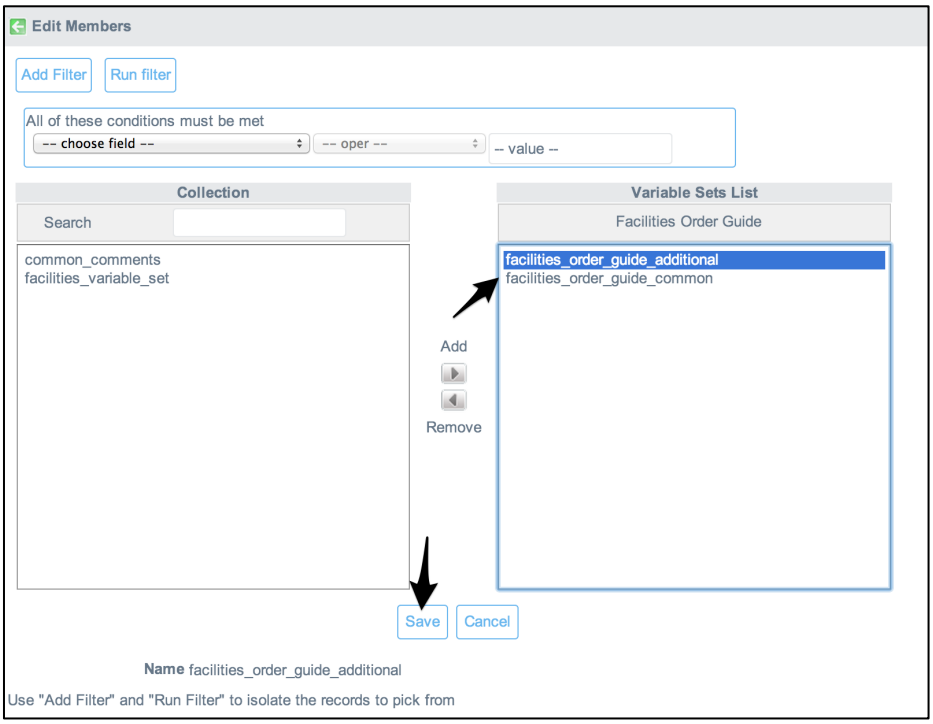
Note: **Let's save some time!**
Creating variables on an order guide is no different than on a catalog item. To save time, since you should already know how to create variables from the catalog 101 class, we will use pre-created variable sets.

1. In the **Variable Sets** related list, click **Edit.**



®2014 ServiceNow, Inc. All rights reserved.

2. Select **facilities_order_guide_common** and **facilities_order_guide_additional** from **Collection** and click **Add** to move them to the **Variable Sets List**. Click **Save** when complete.



Note: These are the variables included in the variable sets.

facilities_order_guide_common variable set includes:

- User to Onboard (reference to sys_user, name = **user**)
- Start Date (date field, name = **start_date**)
- Notes or Comments about the User (text, name = **comments**)

facilities_order_guide_additional variable set includes

- Need a Security Badge? (type = Checkbox, name = **security_badge**)
- Need an Indoor Plant (type = Checkbox, name = **plant**)
- Need a Power Strip (type = Checkbox, name = **power_strip**)
- Need Office Keys (type = Checkbox, name = **office_keys**)

3. Click **Try It** to see the variables on the Order Guide.

©2014 ServiceNow, Inc. All rights reserved.

Create Rule Base Conditions

Note: The Rule Base facilitates the dynamic "show/hide" of catalog items in the order guide **choose options** page based on variables selected in the **describe needs** page.

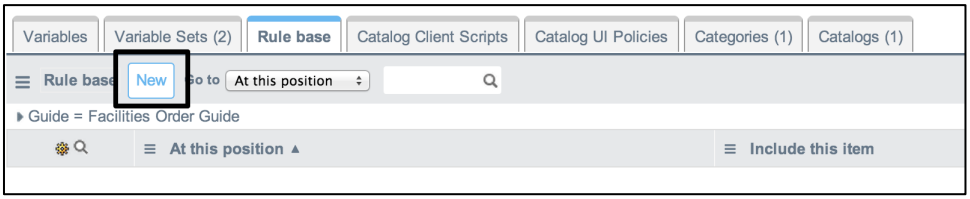
1. Return to the newly created Order Guide by navigating to **Service Catalog > Order Guides > Facilities Order Guide**.
2. Click **New** under the Rule Base related list to create the following **Rule Base** conditions. Click **Submit** after each one and Click **New** to start the next.

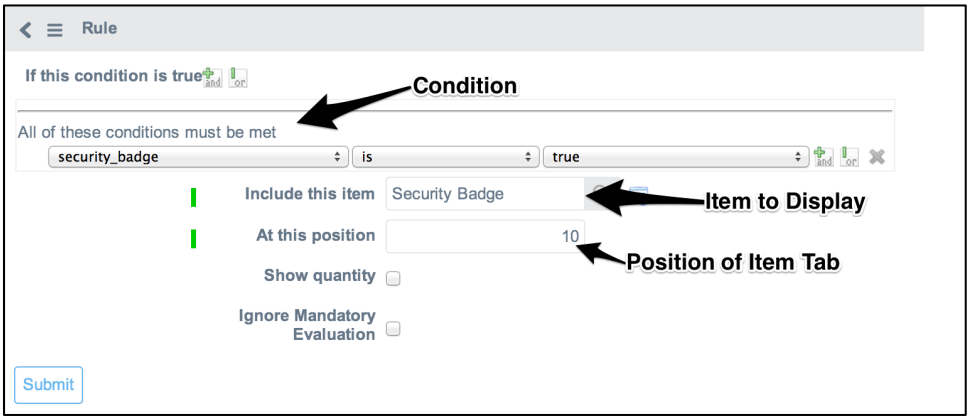
Security Badge
Condition: security_badge -- is – true
Include this item: "Security Badge"
At this position: 10

Indoor Plants
Condition: plant -- is – true
Include this item: "Indoor Plants"
At this position: 20

Power Strip
Condition: power_strip -- is – true
Include this item: "Power Strips"
At this position: 30

Office Keys
Condition: office_keys -- is – true
Include this item: Office Keys
At this position: 40





Note: At this Position determines the catalog item tab order on the choose options page of the order guide. Smaller to larger appears as left to right.

©2014 ServiceNow, Inc. All rights reserved.

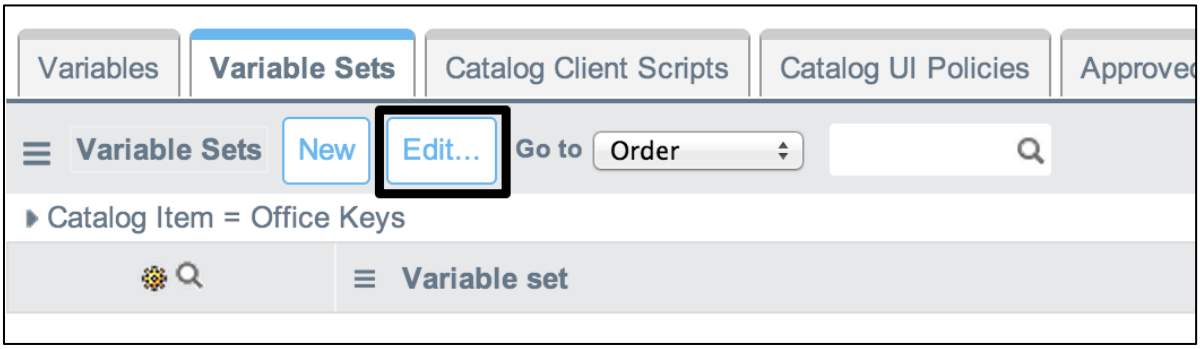
How to Cascade Variables

Note: **Cascade Requirements**
Data from variables on the Order Guide can be cascaded (or copied) down to the catalog items as long as the Order Guide's **Cascade Variables** checkbox is checked AND the name of the variables on the Catalog Item is exactly the same as the ones on the Order Guide.

1. Go to **Service Catalog > Order Guides > Facilities Order Guide**.
2. Check **Cascade Variables**.
3. Click **Update** on the Order Guide.

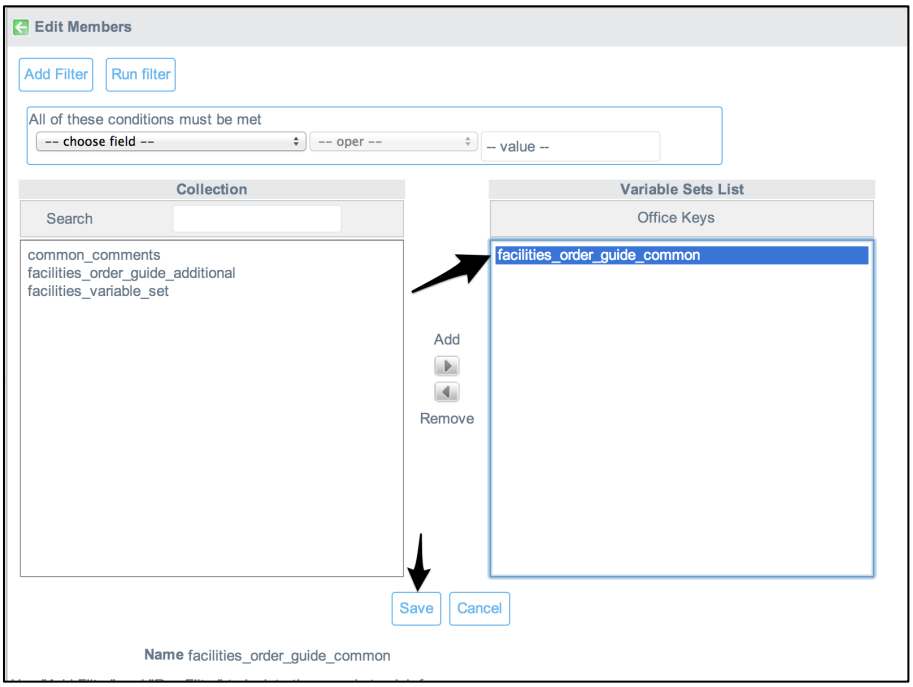
Add Similar Fields to the Catalog Items

1. Go to **Service Catalog > Maintain Items**.
   Find the catalog item named **Office Keys** and click it.
2. Click **Edit** under the **Variable Sets** related list to add the Variable Set **facilities_order_guide_common** to the catalog item.



©2014 ServiceNow, Inc. All rights reserved.

3. Select **facilities_order_guide_common** from **Collection** and click **Add** to move it **Variable Sets List** then click **Save**.



Reminder: The **facilities_order_guide_common** variable set contains the exact same variables used on the order guide.

You could have easily created local variables (with the exact same name) on each catalog item. You could also have created only those variables you wanted to cascade rather than all.

Note: To save time the above variable set has already been applied to the other catalog items used in the order guide.

- Security Badge
- Indoor Plants
- Power Strips

©2014 ServiceNow, Inc. All rights reserved.

Try it out

1. Go to **Self-Service > Facilities Catalog > Furniture and Décor**
2. Click **Facilities Order Guide**
3. Go through the submission process and choose all the vacation options.
4. Fill out the order guide and choose options. For testing, check and fill out all variables.
5. You should see that the data from the order guide has cascaded down to the catalog items.
6. Fill out the catalog items and submit.

©2014 ServiceNow, Inc. All rights reserved.

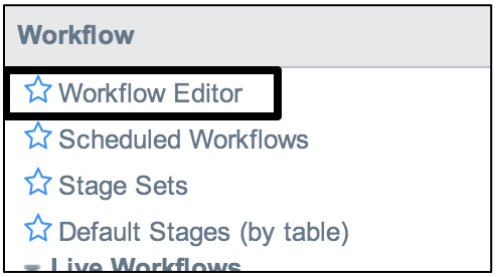
Lab 4 Goal

Your facilities group does not want to receive lots of phone calls from people trying to understand at what stage their requests are. So you need to implement stages in those requests to visually show the end user where it is at in the process.

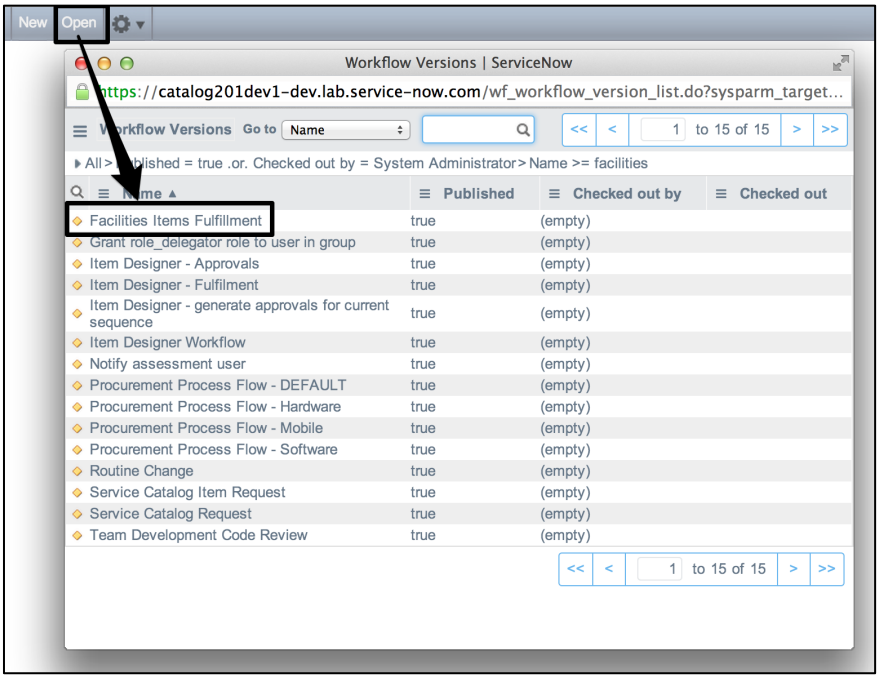
Lab 4 Workflow Stages

Modify Workflow Stages

1. Go to **Workflow > Workflow Editor**.

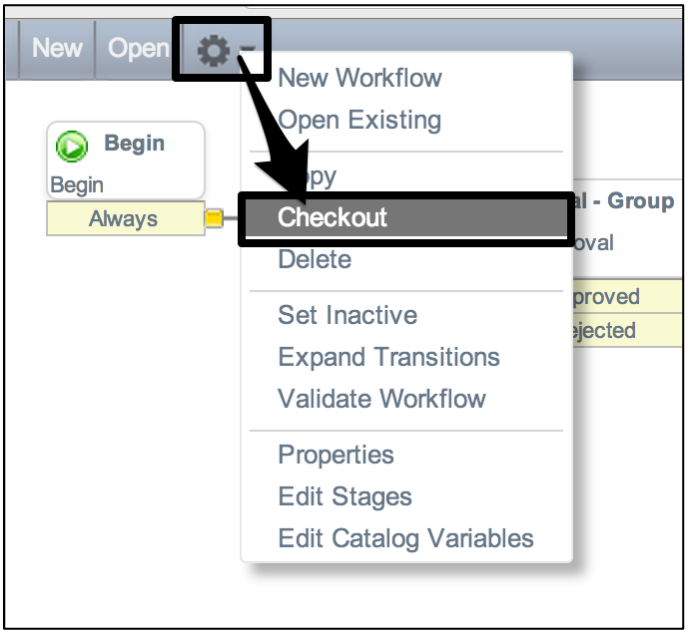


2. Click **Open** and find/open **Facilities Item Fulfillment**.

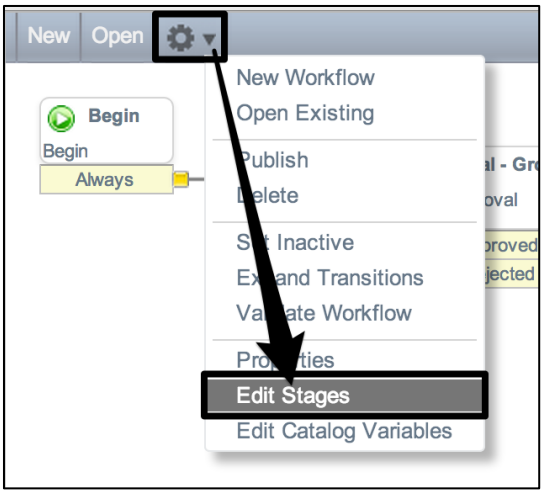


©2014 ServiceNow, Inc. All rights reserved.

3. Click the **Gear Icon** and select **Checkout** to checkout the workflow for editing.

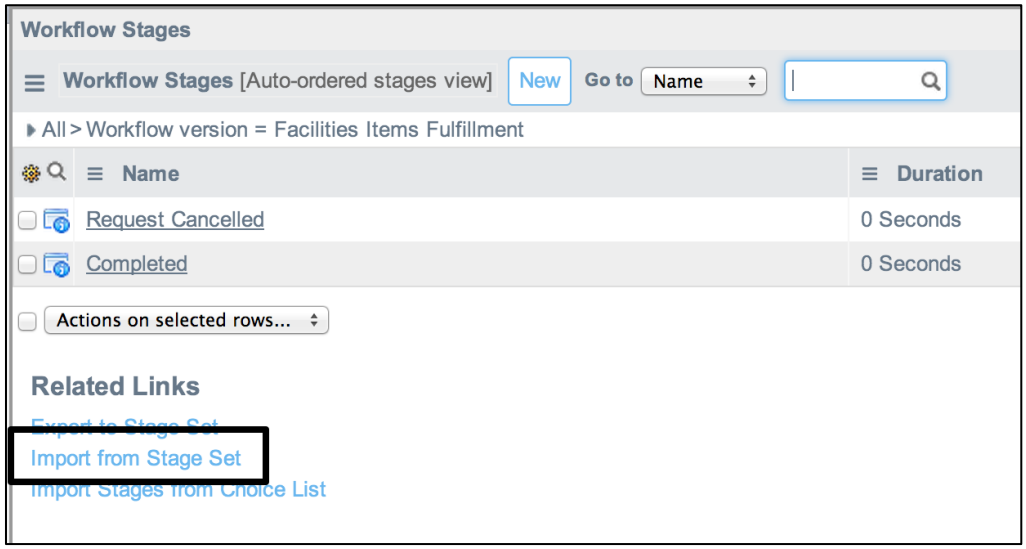


4. **Gear Icon > Edit Stages**

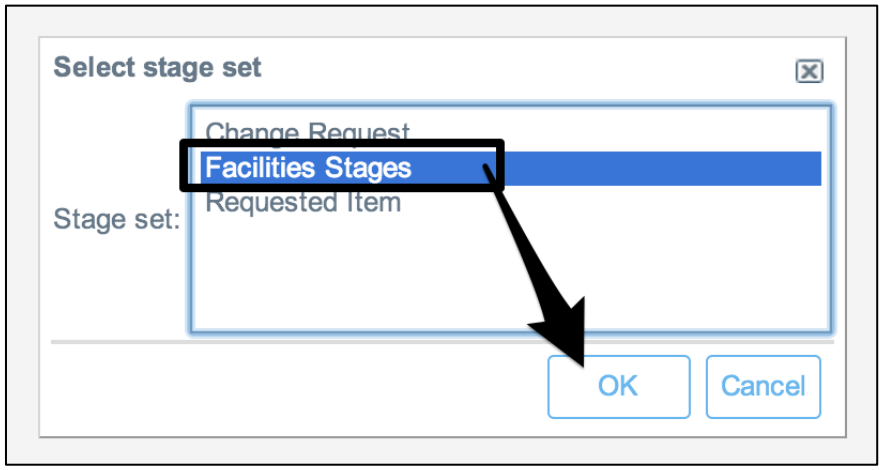


©2014 ServiceNow, Inc. All rights reserved.

5. Click **Import from Stage Set** to add Workflow stages from a workflow stage set.

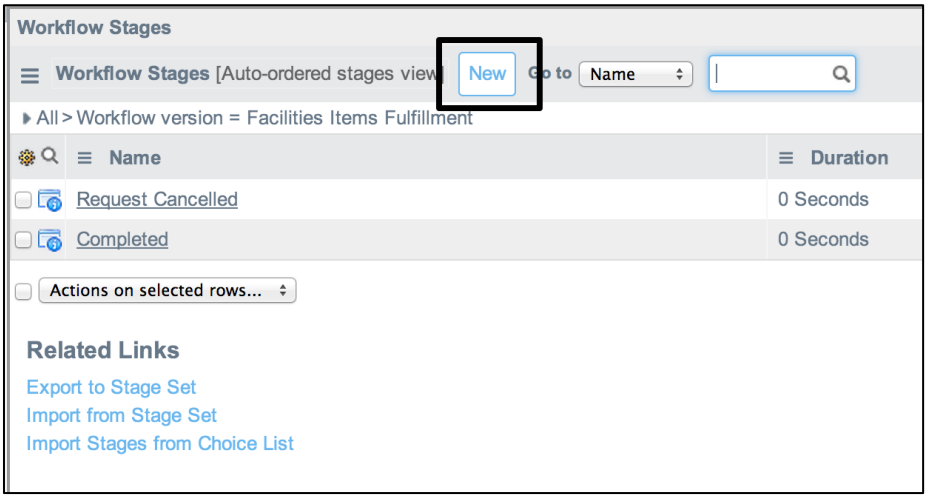


6. Select **Facilities Stages** and click **OK**.



©2014 ServiceNow, Inc. All rights reserved.

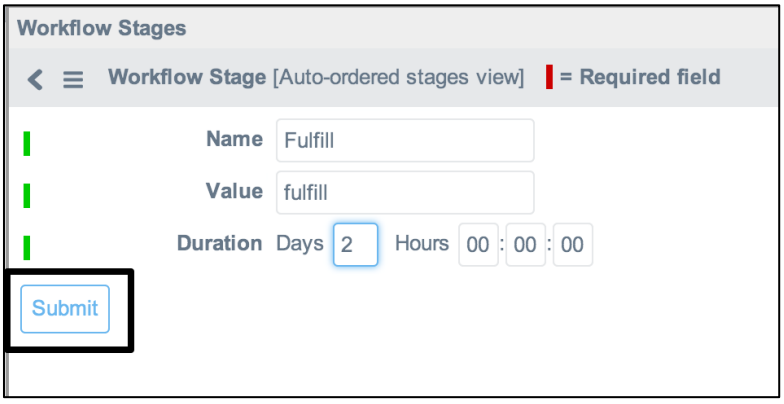
7. Click **New** to manually create another Workflow Stage.



8. Create a new stage with the following information and click **Submit**.

   Name: **Fulfill**
   Value: **fulfill**
   Duration: **2 days**

> **Note: Workflow Duration**
> A Workflow stage can be given a duration. This can clearly communicate a fulfillment time for this stage. However the duration is a static amount of time.



9. Close the Workflow Stages window.

©2014 ServiceNow, Inc. All rights reserved.

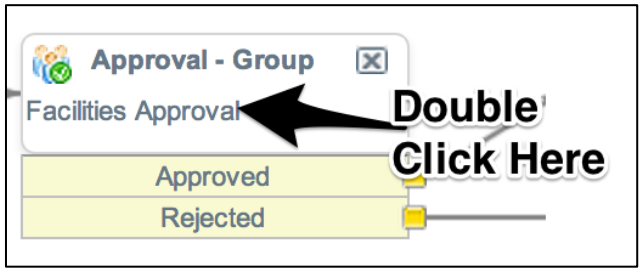
Add Stages to the Workflow Activities

1. Apply Stages to Workflow Activities

2. Every workflow activity has a “Stage” reference field.



3. Open the following workflow activities, by double clicking on the activity box header, and update with the following stages.



Activity: **Facilities Review – Approval – Group**
Stage: **Facilities Review**

Activity: **Assess the Need – Catalog Task**
Stage: **Assess**

Activity: **Fulfill the Need – Catalog Task**
Stage: **Fulfill**

Activity: **End**
Stage: **Completed**

4. **Gear Icon > Publish** to publish the workflow.

5. **Submit** the Order Guide Completely.

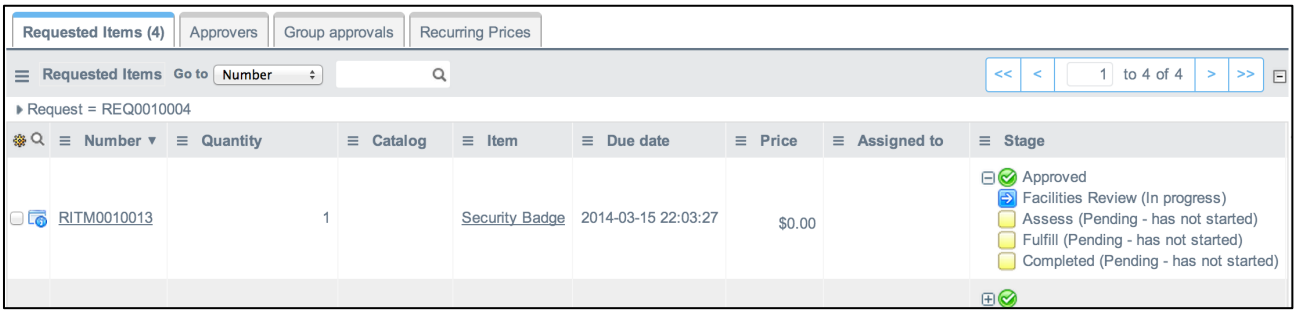
©2014 ServiceNow, Inc. All rights reserved.

6. Go to **Self-Service > Facilities Catalog > Furniture and Décor > Facilities Order Guide**.

> **Note: Pay attention to what you have just configured**
>
> - You should only see those catalog items that you selected from the Order Guide (determined by your Rule Base conditions).
> - Your Order Guide Variables should cascade down to the catalog items.
> - The selected Catalog Items should have the stages you configured.

7. Go to **Service Catalog > Open Requests** and click the Request you just submitted.

8. Scroll down to the **Request Items** related list and review the **Stages**.



9. Click the Security Badge Requested Item (RITM) and take note of the variables on the form.

10. Approve the Security Badge Requested Item and note how the stage progresses.

11. Complete tasks on the Security Badge request item. As you close one, another should appear till all are completed. Note how the stages complete as you complete the tasks.

12. Congratulations you are All Done!

©2014 ServiceNow, Inc. All rights reserved.

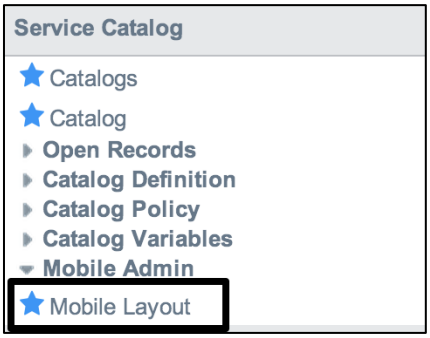
Lab 5 Goal

Facilities people frequently use their mobile phones to request catalog items. Configure the mobile catalog to make it more simple and available for them.

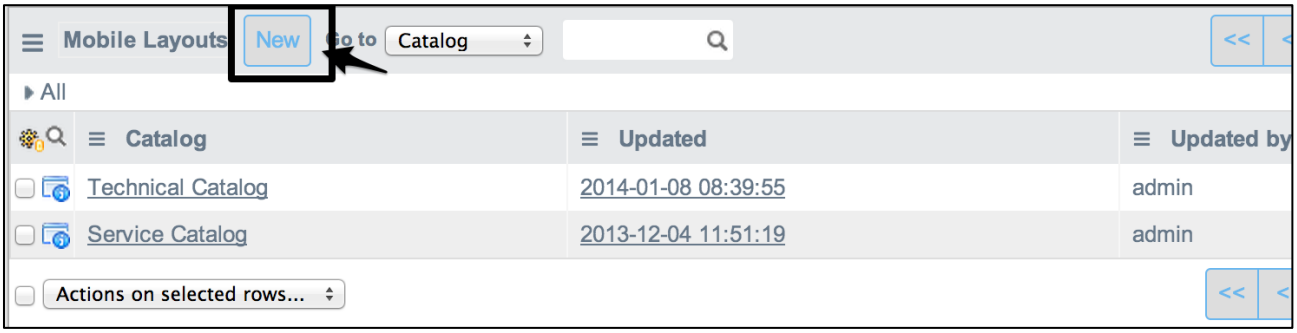
Lab 5 Configure Mobile Catalog

Create and Modify the catalog mobile layout.

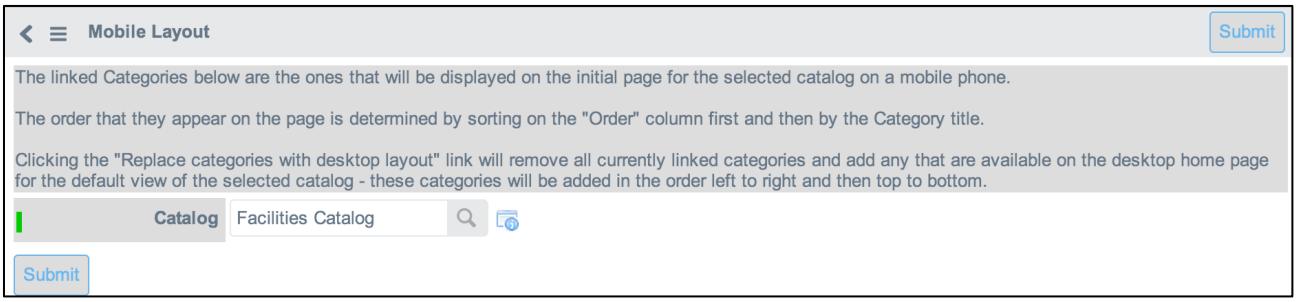
1. Go to **Service Catalog > Mobile Layout**.



2. Click **New** to create a new mobile layout for our Facilities catalog.

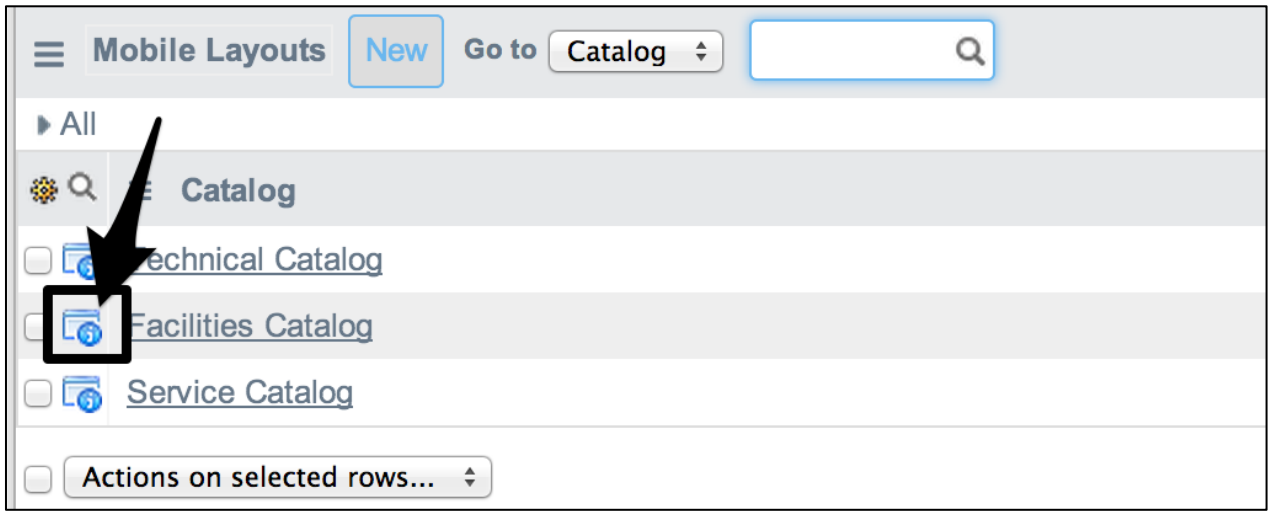


3. Select **Facilities Catalog** and click **Submit**.

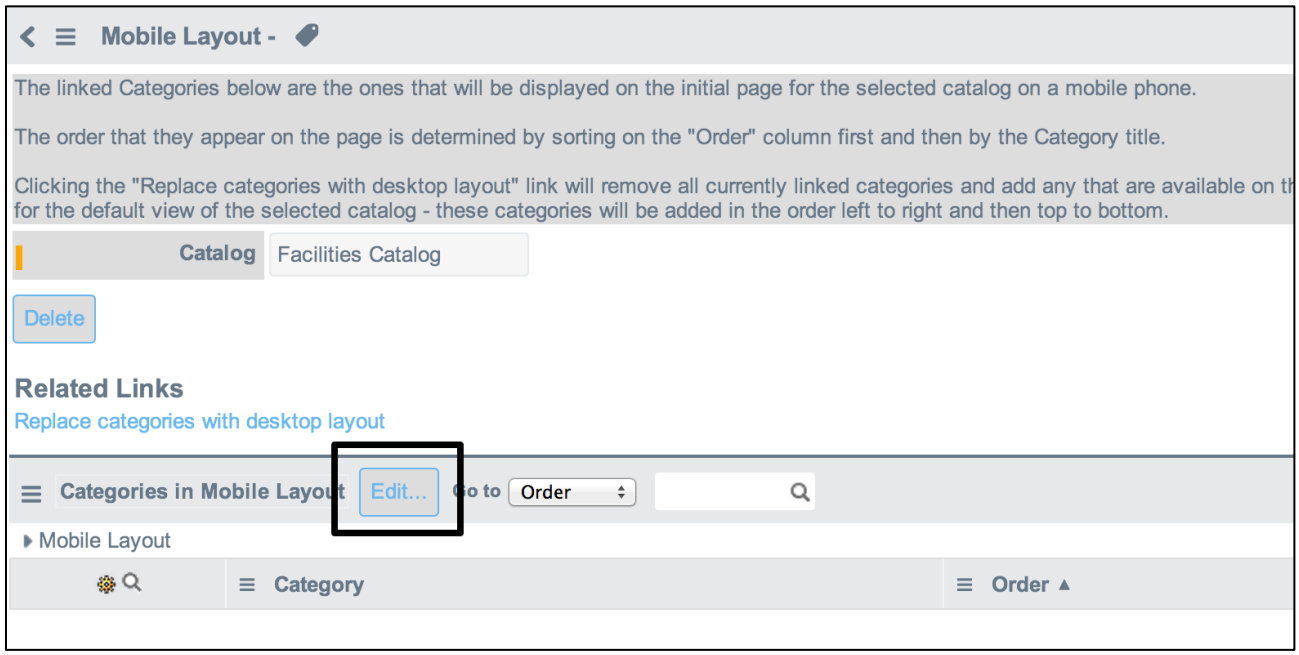


©2014 ServiceNow, Inc. All rights reserved.

4. Choose the **Facilities Catalog row icon** in the Mobile Layouts list.
   Make sure you click the row icon, NOT the first column link.

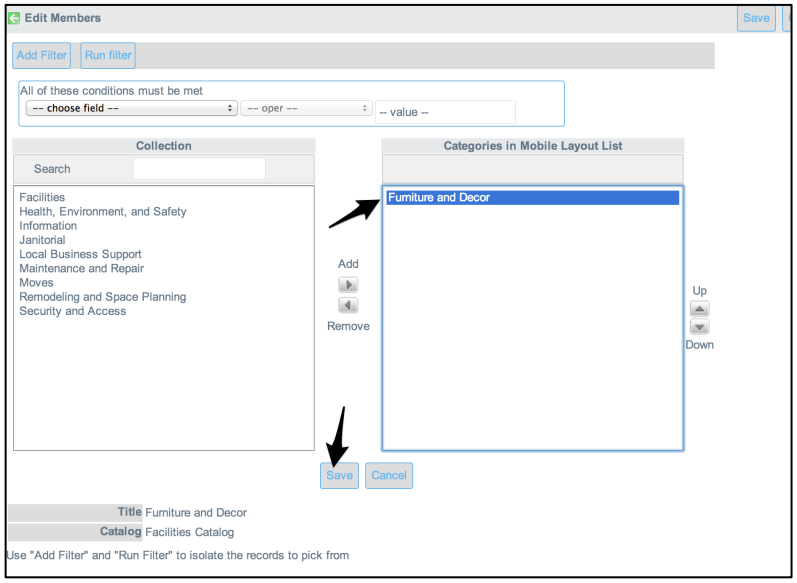


5. Click **Edit** to add/remove categories in **Mobile Layout**.



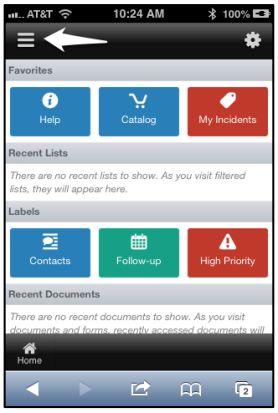
©2014 ServiceNow, Inc. All rights reserved.

6. **Add** any items you would like from the **Collection** to the **Mobile Layout List**.



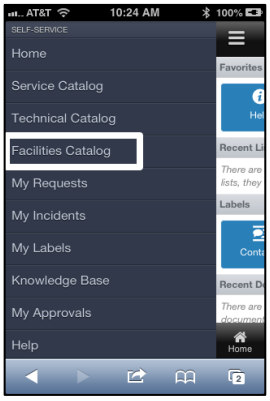
7. Login to your instance as **itil** via a mobile browser directly or from a laptop by adding $m.do to the instance URL. https://<instance>/$m.do

8. Your screen should look like this. Tap the **menu icon** (nicknamed “3-line” or hamburger).

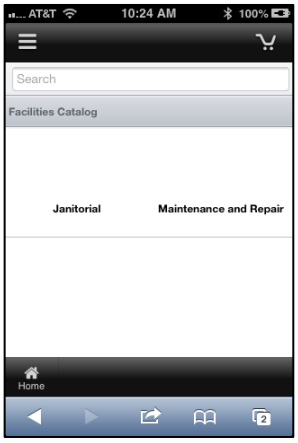


©2014 ServiceNow, Inc. All rights reserved.

9. Tap **Facilities Catalog**



10. You should see the **Facilities Catalog** on your mobile device.



Note: The **Facilities Catalog** module in the **Self-Service** application menu is not there by default. It was created for this lab.

©2014 ServiceNow, Inc. All rights reserved.

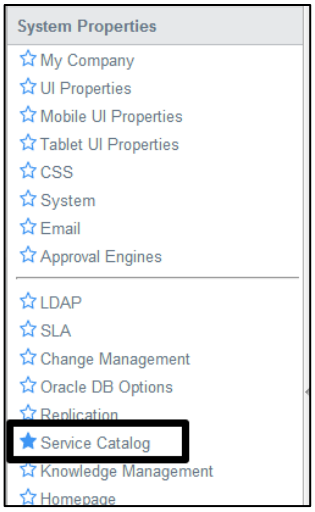
Lab 6 Goal - Extra

Review additional properties that can customize your catalog(s).

Lab 6
Get Familiar with Some Catalog Properties

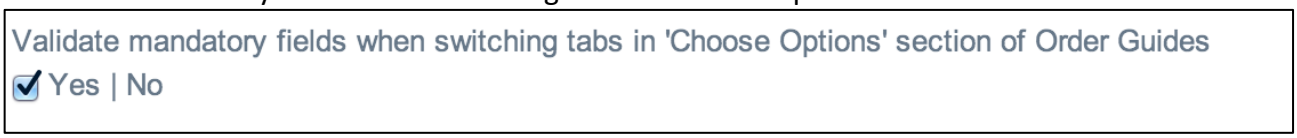
Useful Order Guide Properties

1. Go to **System Properties > Service Catalog** to see a list of available catalog properties.



©2014 ServiceNow, Inc. All rights reserved.

2. “Validate mandatory fields when switching tabs in ‘Choose Options’ section of Order Guides”



This property is enabled by default. On the “Choose Options” page of an order guide, each catalog item tab may contain mandatory fields. Normally you cannot move from one tab to another without populating all mandatory fields on that item. This allows you to bypass that default functionality and navigate between tabs without mandatory fields being mandatory.

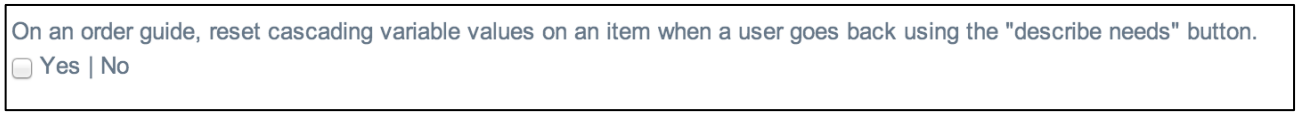
Un-check this property and save.

Re-submit the Facilities Order Guide. On the Choose options page remove values in a mandatory field, and then try to click on another tab. It should not prevent you from clicking away from a tab now.

Re-check this property and test the other way.

©2014 ServiceNow, Inc. All rights reserved.

3. “On an order guide, reset cascading variable values on an item when a user goes back using the "describe needs" button.”



In the order guide process if the user is on the “Choose Options” page and realizes they want to modify something previously on the “Describe Needs” page and clicks on the “Describe Needs” button to return to that page. Normally the variables will not cascade a second time if modifications were made. In order to get around this, this property will allow variables to be reset when a user goes back to the “Describe Needs” page in order to re-calculate and cascade any modified variables.

Do the following to test.

Submit a Facilities Order Guide again. This time on the choose options page, click the “Describe Needs” button which will return you to the “Describe Needs” page of the order guide.

Modify the “User to Onboard” and click “Choose Options”. You should notice that the “User to Onboard” did not cascade a second time.

Now check this property and redo the test. It should now re-cascade the “User to Onboard” correctly.

Useful Category Item / Category Properties

4. “Show the additional categories section when viewing a catalog item:”

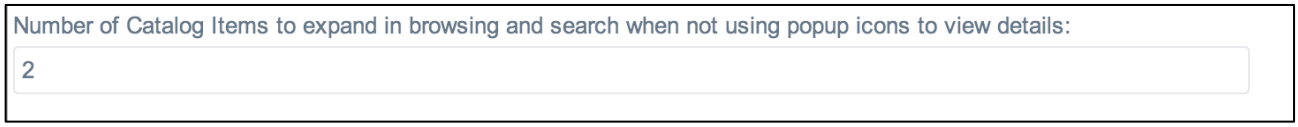


When viewing a catalog item, if it also listed in other categories, and you want to display these additional categories to the user, keep this checked. To hide them, uncheck it.
Example: **Self- Service > Service Catalog > Hardware > Sales Laptop**

Notice a small section called “Exists in categories”. If this is not checked, it will not show these additional categories.

©2014 ServiceNow, Inc. All rights reserved.

5. “Number of Catalog Items to expand in browsing and search when not using popup icons to view details:”



By default, the first 2 catalog items in a category list will have their “More Information” aka item description expanded. If you want to modify how many are expanded by default you can modify this number.

Change to 1 and Save.

Go to **Self- Service > Service Catalog > Hardware**. Notice that only the first catalog item has the “More Information” item description expanded by default.

6. “When browsing a category use the popup icon to show item details:”



By default, when viewing the list of catalog items in a category, you can expand the “More Information” link to view the item description. If you do not want this capability, you can check this property. It will remove the item description in the “More Information” section, and allow you to hover over the item icon to view the item description.

Check this property and go to **Self-Service > Service Catalog > Hardware**.

You will notice that each catalog item does not have the “More Information” and description displayed anymore. If you hover over the icon on each catalog item you will notice it now uses a popup to display this item description.

©2014 ServiceNow, Inc. All rights reserved.