knowledge17

http://clabs.link/lab132000

WORK at LIGHTSPEED

Service Catalog Design

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ServiceNow

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servicenow

Agenda

- Introductions
- Why We Are Here Today
- What We Will Do
  - Service Catalog Overview
  - Planning and Organizing the Service Catalog
  - Building and Managing the Service Catalog
  - Workflows Run the Show
  - Reporting is Key
- How We Will Do It
  - Slides
  - Labs
- Summary
- Q&A

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Speaker Introduction



Name: Hilton Rosenfeld

Title: Solution Architect

Function: Pre-Sales

Company: ServiceNow

Experience: 9 years in IT technical sales, 27 years in IT Operations

Expertise: Cloud Services, Automation and Orchestration, DevOps

Current Projects: Technical Sales, ITOM Experts Program, CMDB Workshops

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Objectives and What You Will Learn

Objectives

- Provide a better user experience through self-service

What you will learn

- All about the ServiceNow Service Catalog
- How easily you can setup a Catalog
- Best approaches to Catalog Design
- Maintenance of a Service Catalog
- Reports and dashboards on Service Catalog

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User Experience

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What is User Experience?

- One familiar and engaging way to use applications on any device with a consumer-grade experience that drives productivity.

- Empower customers, partners, employees with context rich app and smart products to help them decide and act immediately in their moment of need.

- All aspects of the user's interaction with your organization and it's services or products on any platform.

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How Important is User Experience?

- Improving User Experience is the **#1 priority** for 75% of CIOs.

Gartner 2016

- Key focus area - "…providing relevant **real-time experiences** for the customer, that enhance **engagement with our brands**, and provide **measurable value** to our stakeholders…"

Paul Young, CIO, Ardent Leisure

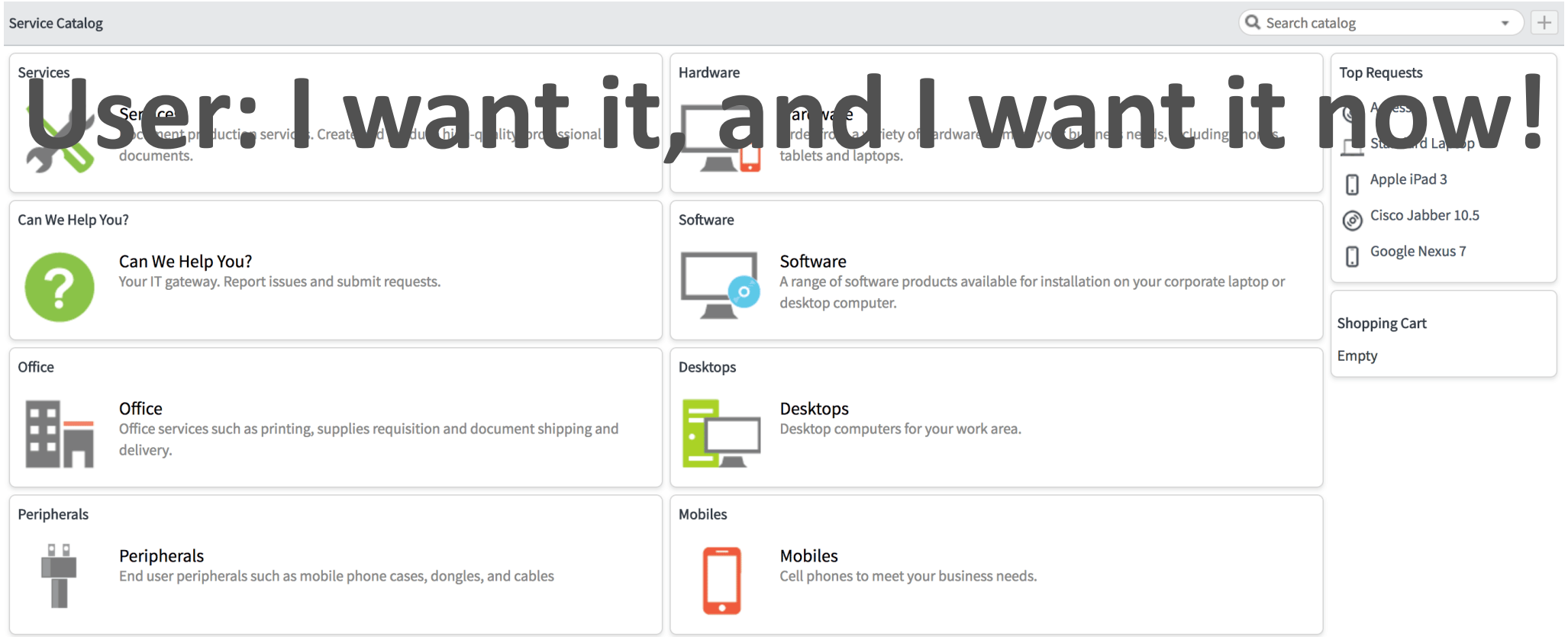
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Service Catalog Overview

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Solution at a Glance

Self Service through an Online Catalogue of Services



User: I want it, and I want it now!

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What Is a Service Catalog?

- The service catalog provides a customer-facing view of available service and product offerings within departments or an organization.



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Service Details

- When a service is expanded, users are shown a detailed page that outlines all the relevant information pertaining to the service.

Sales Laptop

$1,100.00

Acer Aspire R7. The corporate standard laptop for sales employees. 1.7GHz Intel Dual Core i5 processor. 1TB hard drive.

+$100.00
Monthly

▶ Preview



Acer Aspire R7

The corporate standard laptop for sales employees.

High performance and light weight.

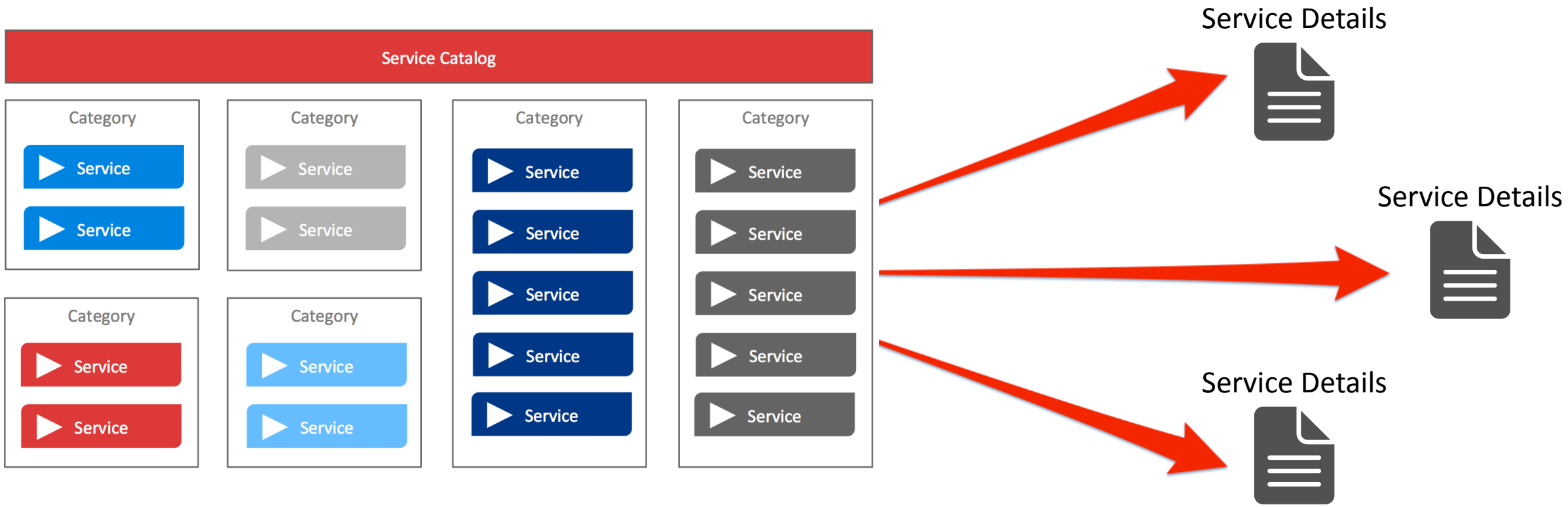
Specifications:

- Intel® Core™ i5-4210U processor Dual-core 1.70 GHz
- 1TB Hard Drive
- 8 GB RAM
- Microsoft Windows 10
- Microsoft Office

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Service on the Backend

- A service catalog provides a means for users to request or consume services, and for an organization to streamline delivery of those services on the backend.



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Defining a Service

- A service definition enables both the customer and the service provider to know what to expect and what not expect from a service.

- Clearly defined services enable customers to understand each service offering.
  - What each service does and does not include.
  - Eligibility and costs.
  - How to request services and get help.

- At a minimum, every customer-facing service should have a high-level service definition or description.



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Service Definition

- Smart service definition is key to excelling at service management.

- A well-defined service also identifies internal processes necessary to provide and support the service.

- Fundamentally there are five questions that should be answered when defining a service.
  - What is the service? (Service Description)
  - How do I order or get help with the service? (Help and Self-Service)
  - What does It Cost? (Service Cost and Pricing)
  - How is this service delivered? (Service Delivery)
  - How is this service supported? (Service Support)

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Lab

- Lab 1.0 Service Catalog Overview (Administrative)
- Lab 1.1 Service Catalog Overview (Employee View)

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Plan and Organize the Service Catalog

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Determine What Services Are Currently Available

- Inventory all current services and processes to determine what services are available.

Name ▲	Short description	Active	Roles	Catalogs	Category	Price	Type	Updated
EC2 Windows Development	EC2 Windows 2008 for Windows Developmen...	true	cloud_user	Cloud Resources	Amazon Virtual Machines	$0.00	Item	11/22/2013 06:49:33
EC2 Windows SQL Server	EC2 Windows 2012 with SQL Server 2012 (...	true	cloud_user	Cloud Resources	Amazon Virtual Machines	$0.00	Item	11/22/2013 06:49:05
12 Month Refrigerant Recharge - Carrier ...	12 Month Refrigerant Recharge - Carrier ...	true		Facilities Catalog	Maintenance and Repair	$0.00	Item	08/06/2015 11:52:13
401(k) benefits	Ask a question about your 401(k) benefits	true		Human Resources Catalog	HR Benefits	$0.00	Item	06/23/2015 12:45:05
6 Month Cleaning and Inspection - Carrie...	6 Month Cleaning and Inspection - Carrie...	true		Facilities Catalog	Maintenance and Repair	$0.00	Item	08/06/2015 11:52:27
Access	Microsoft Access	true		Service Catalog	Software	$139.99	Item	01/18/2014 02:47:15
Account Transfer	Account Transfer for Merging Brokers	true		Service Catalog	Broker Management	$0.00	Item	03/18/2016 07:38:46

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Establishing a Strategy

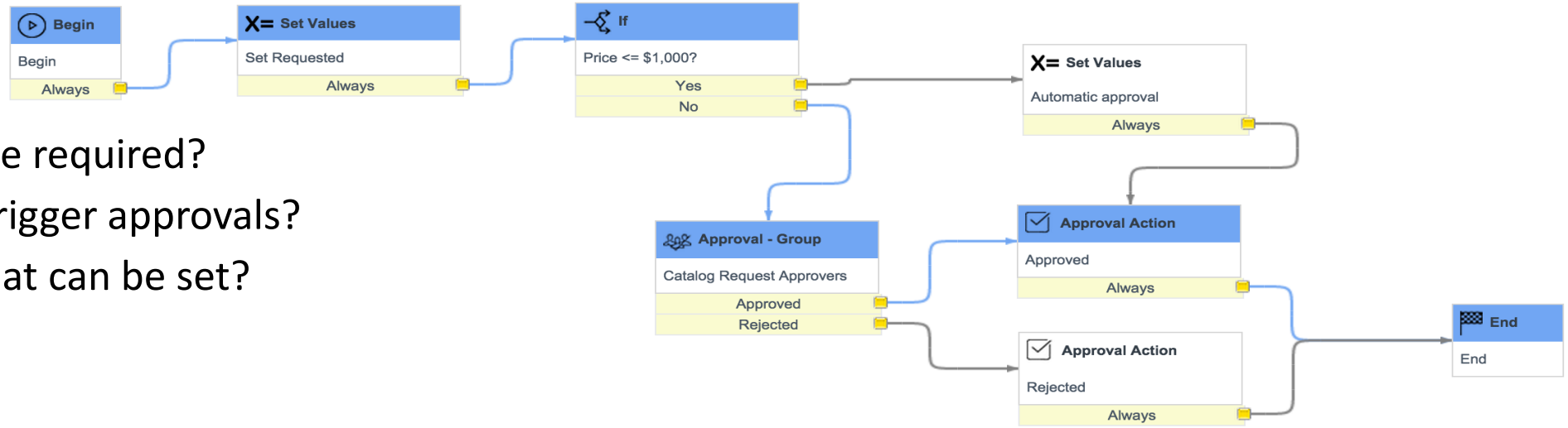
- Understanding that each business unit can have their own catalog will help when picking a strategy to provide services.
  - Services do not have to be technical to be included.
- Determine what services to offer or promote.
  - Does the organization need to offer this service?
  - Which services can be combined or merged with other services?
  - Can workflow assist in the streamlining of this service?



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Define Processes

- Workflows
  - Determine what process can be automated using a workflow.
  - Reuse generic workflows for similar types of items.
  - Don’t assume the process currently in place is best practice.



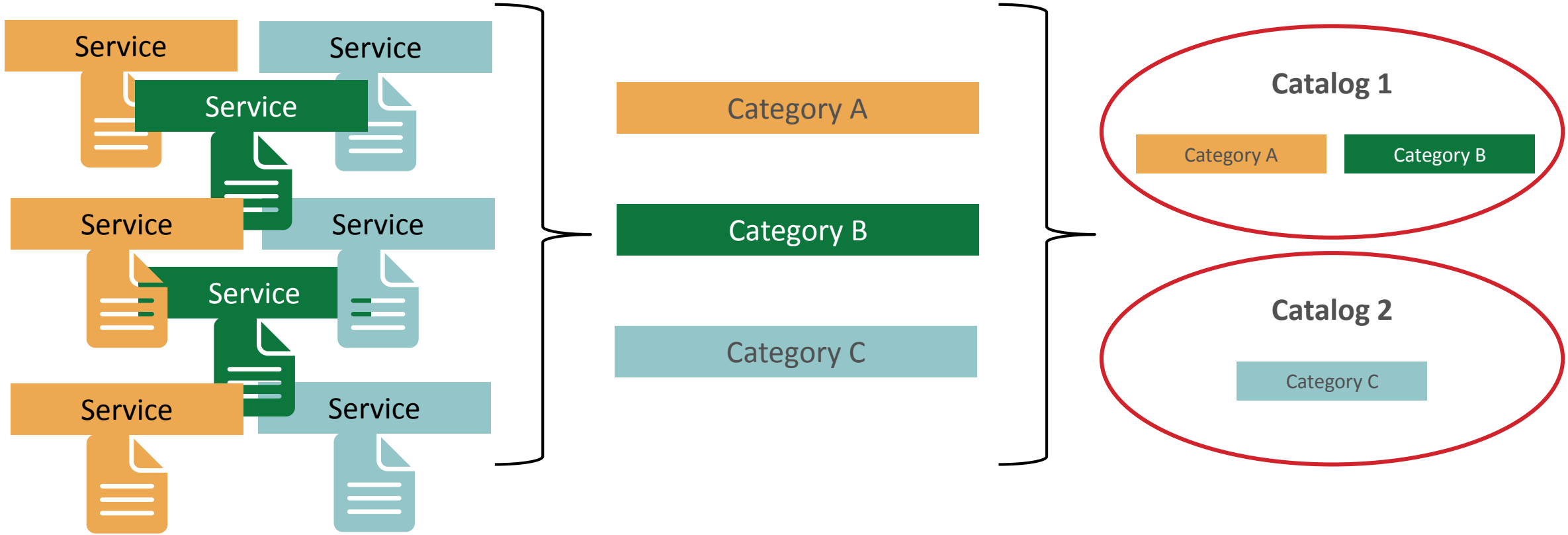
- Approvals
  - What approvals are required?
  - What conditions trigger approvals?
  - Is there a group that can be set?

- Tasks
  - What are the tasks that need to be completed to fulfill this request?
  - Do specific tasks require pre-requisite tasks to be accomplished?

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Establish Catalog Services and Categories

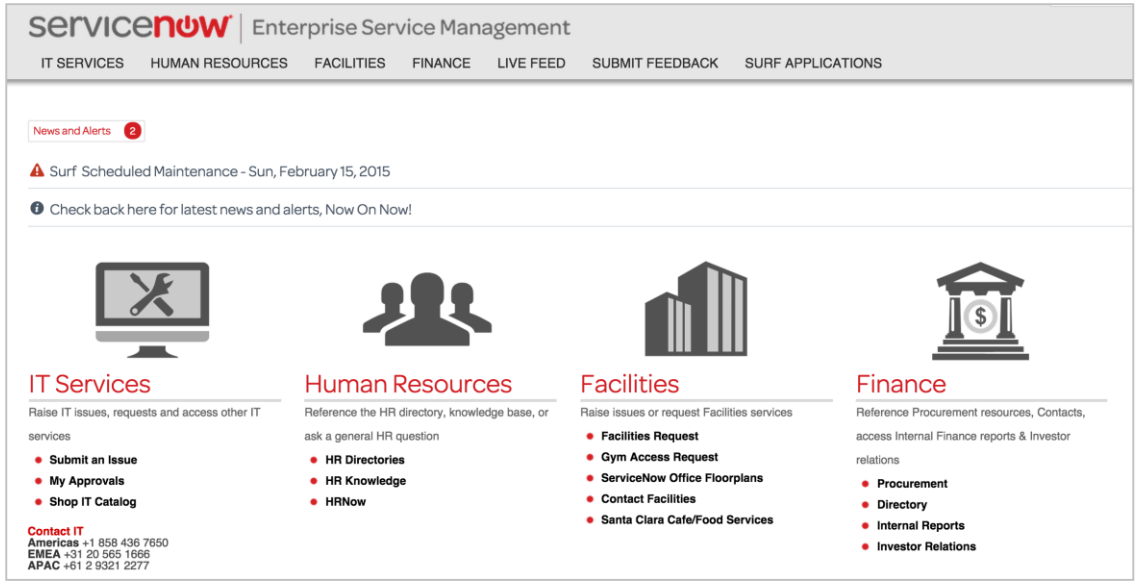
- Group services into categories and then into catalogs.



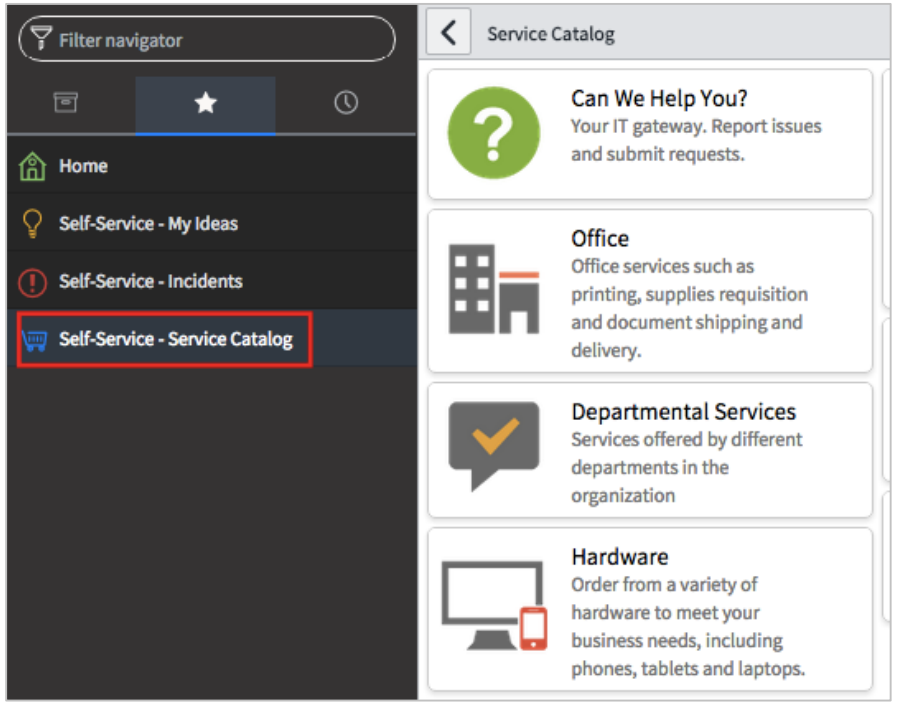
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Access to the Service Catalog

- Customers can access the catalog multiple ways, allowing them to see all the services available to them.



A Central Portal (External)



Application Menu/Homepage (Internal)

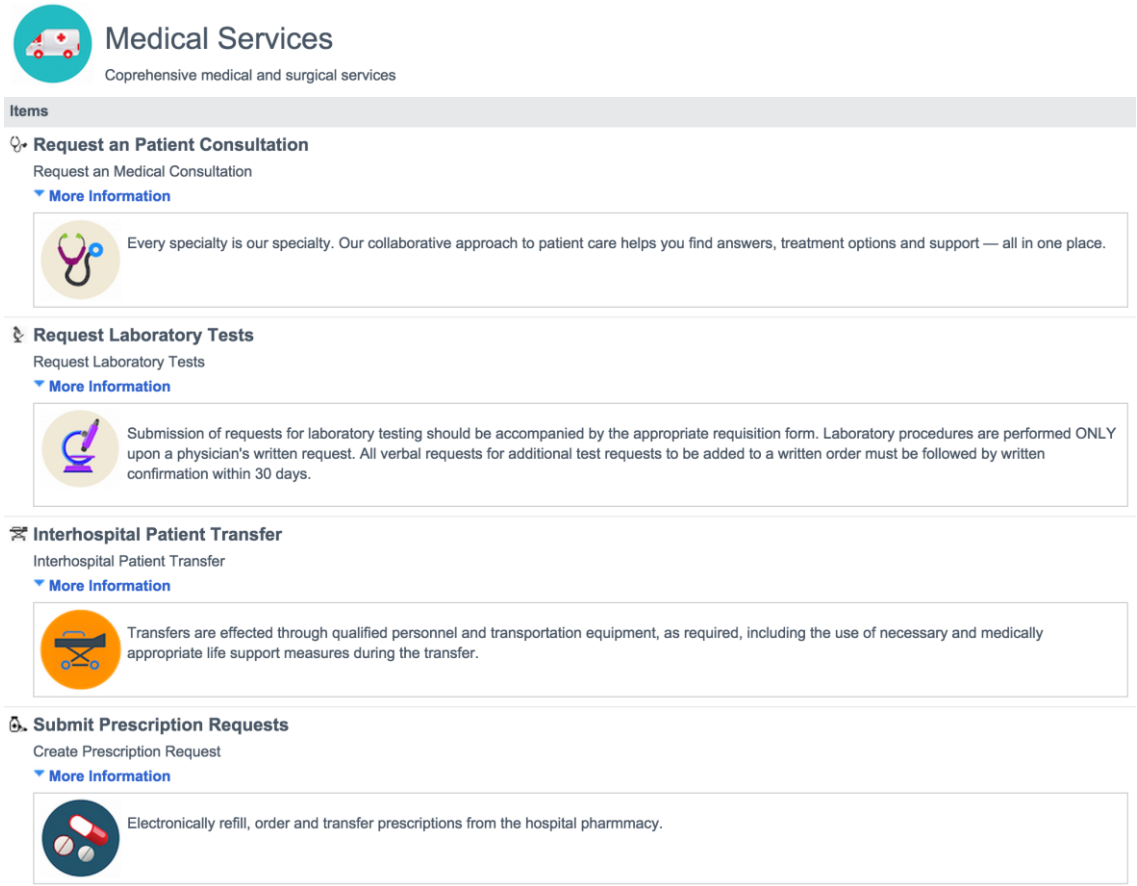
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Building and Managing the Service Catalog

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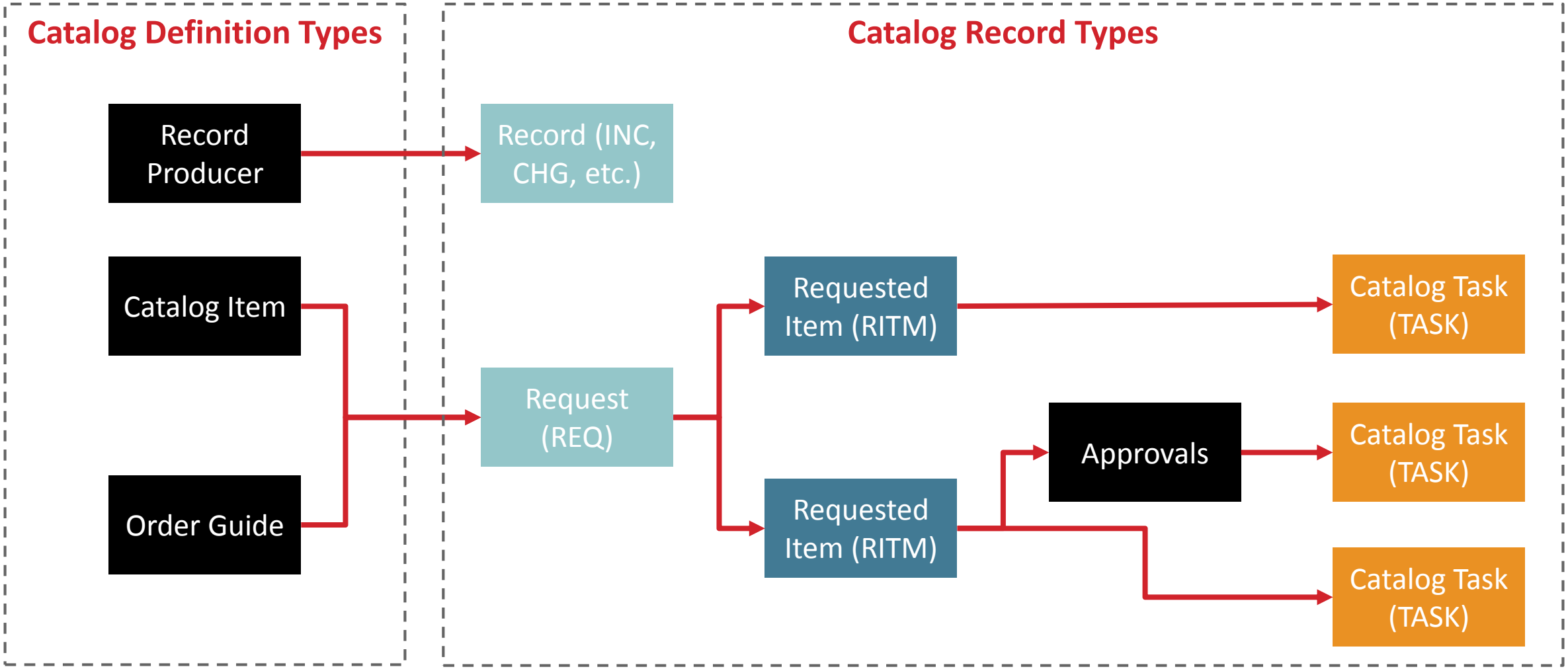
Manageability

- Ensure your Service Catalog can scale to meet growth.
  - Create a consistent look and feel.
  - Descriptions, naming conventions, icons and graphics.
  - Use Variable Sets when possible.
  - Use UI Polices and minimize Client Scripts.



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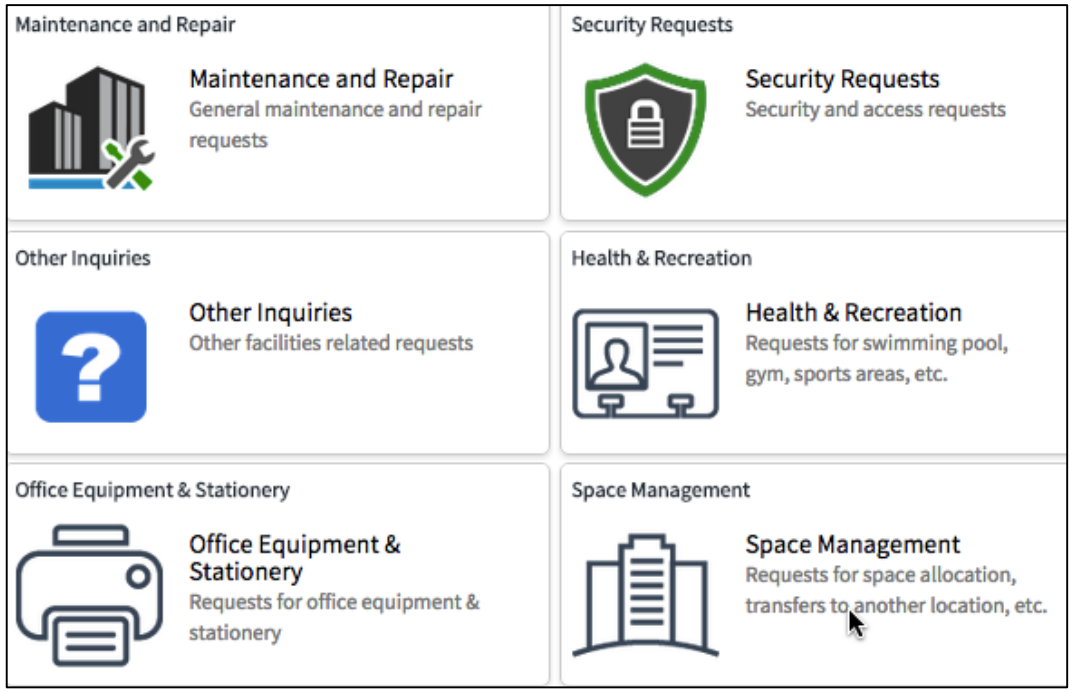
Service Catalog Records Order



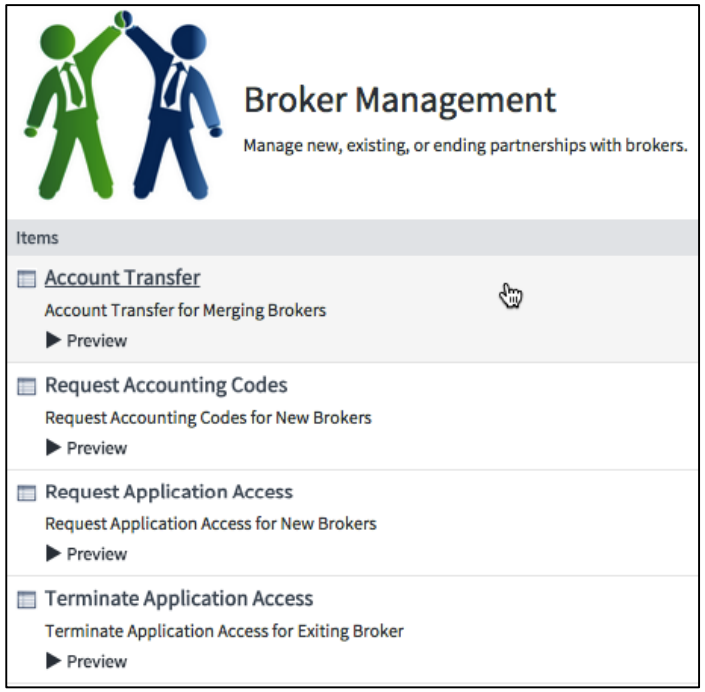
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Catalogs

- Different catalogs are designed based on the customers they are intended to serve.



Facilities Catalog



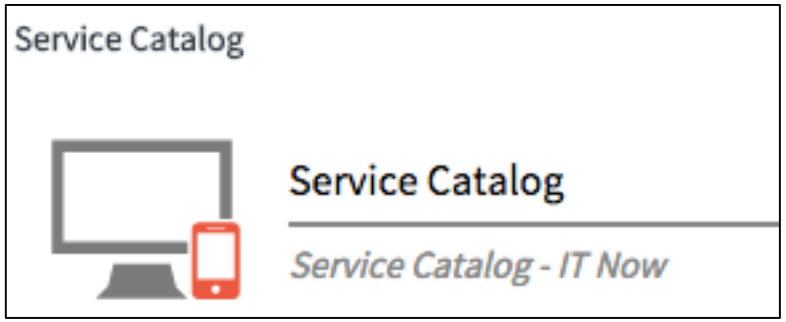
Broker Management Catalog

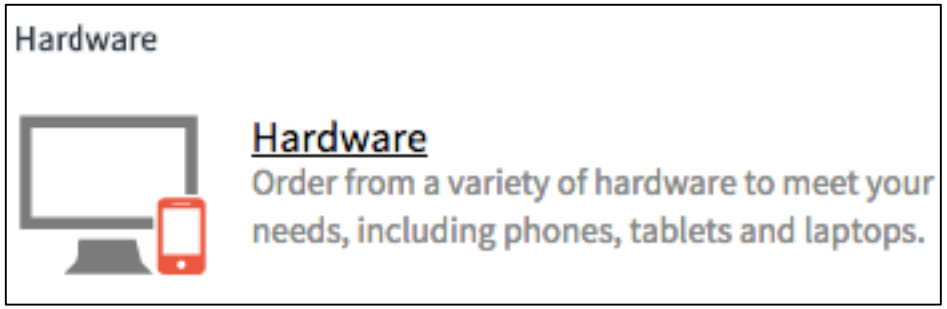
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Catalog Items

- Catalog items are goods or services that are available to order from a service catalog.

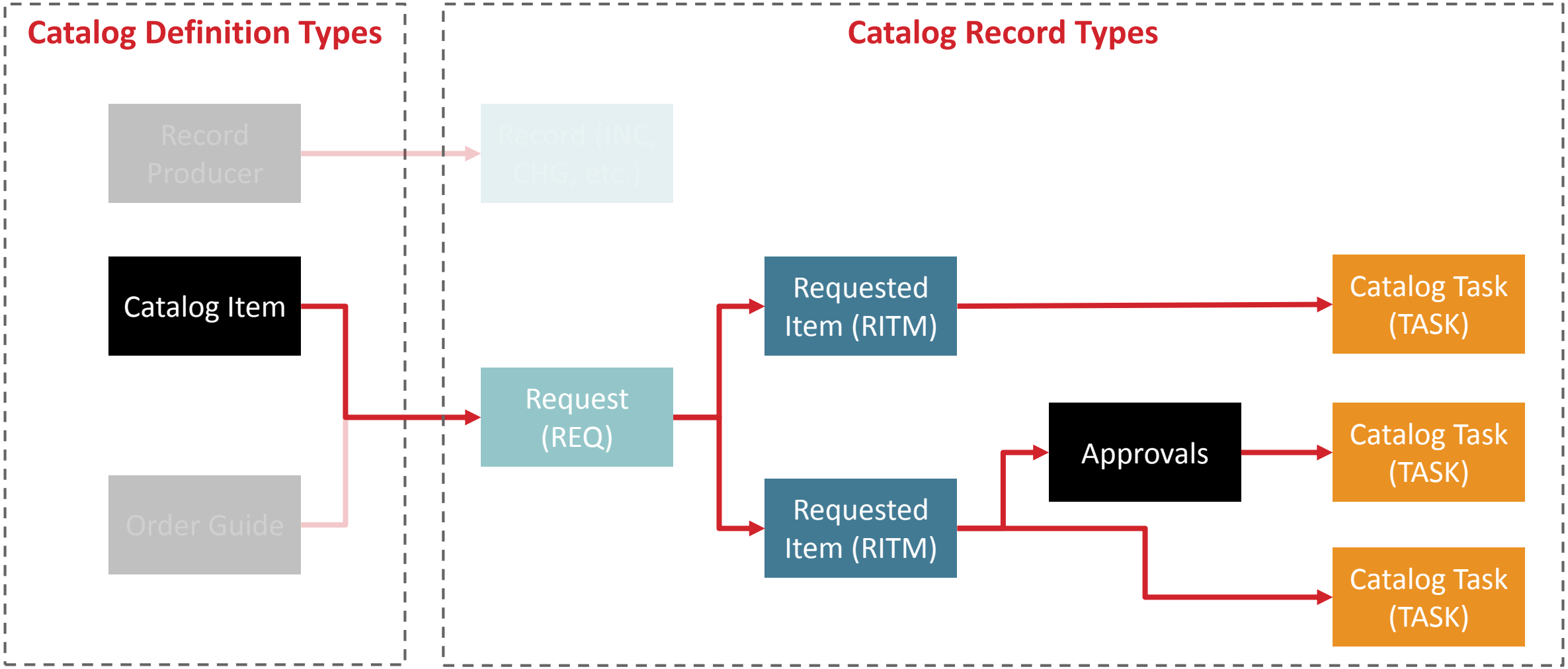
- Catalog items may be created from the Product Catalog and related back to vendors, which allows Procurement to generate an electronic trail when sourcing an item from a vendor.
  - Purchase Orders
  - Receiving Slips
  - Transfer Orders





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Catalog Items

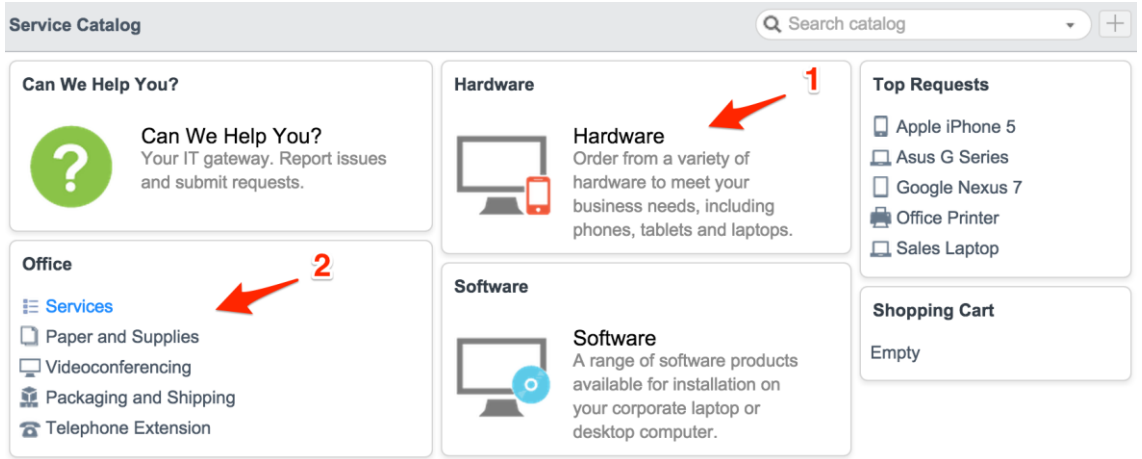


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Categories & Subcategories

- Categories allow you to group and organize your items logically to help the customer find what he or she is looking for.

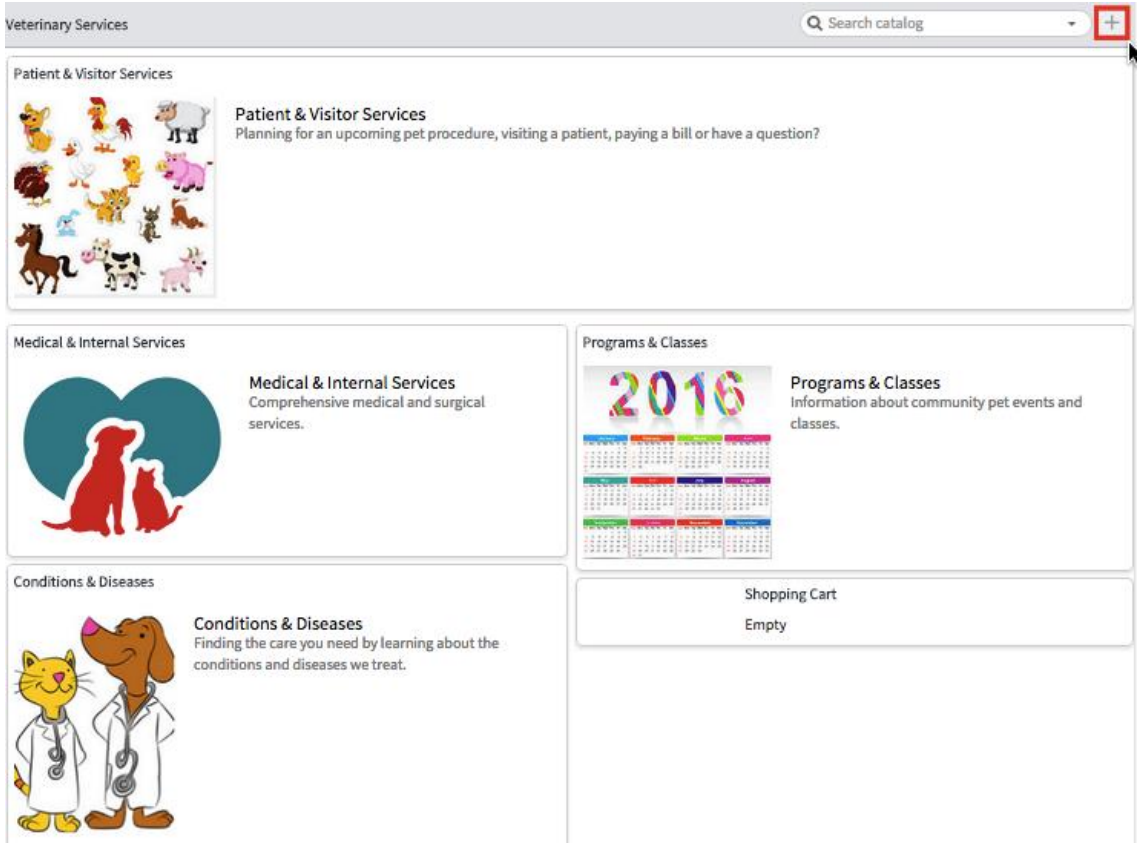
- Categories may render in a details view (1) or an items view (2).



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Customizing Homepages

- The homepage for a service catalog provides the primary front end for ordering items within that catalog.
- Use the plus icon + to add categories to your catalogs or homepages.
- Click and drag categories to rearrange homepages.



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Lab

- Lab 1.2 Create a Catalog and Categories

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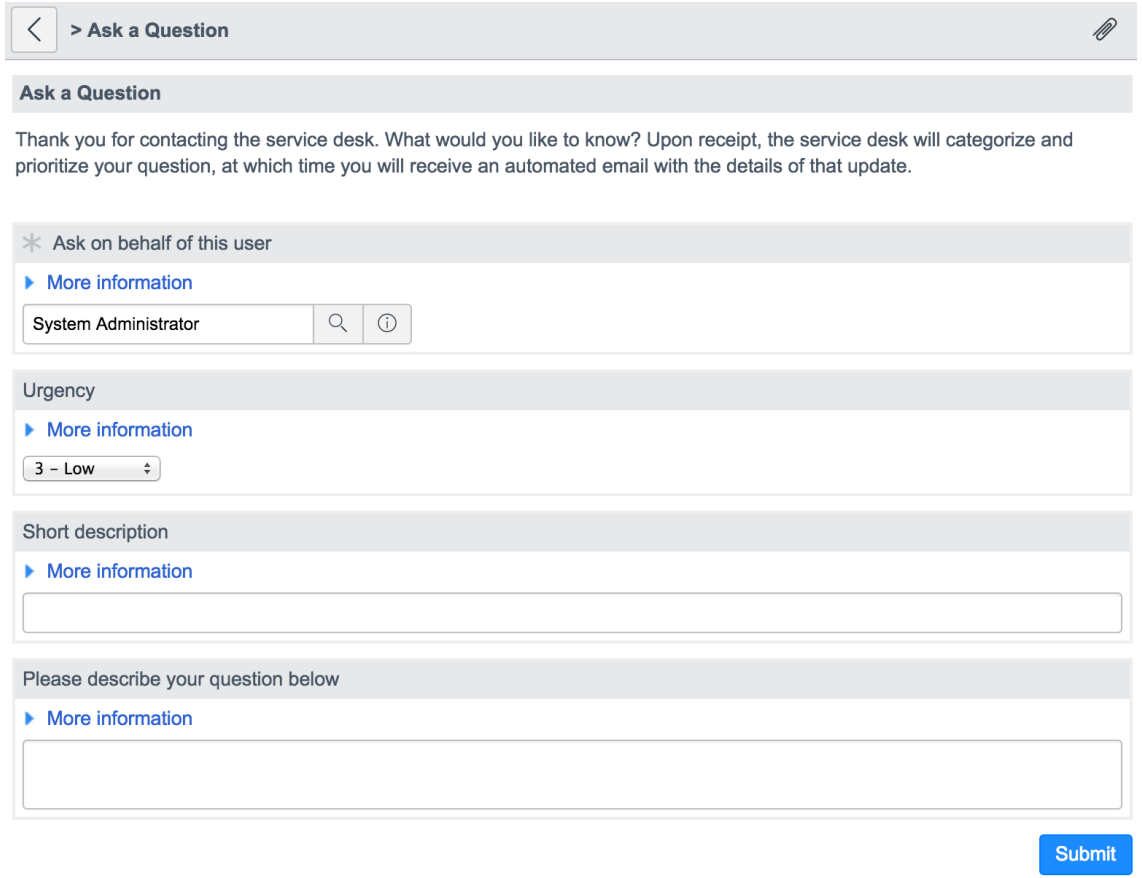
Building Service Catalog Items

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Record Producers

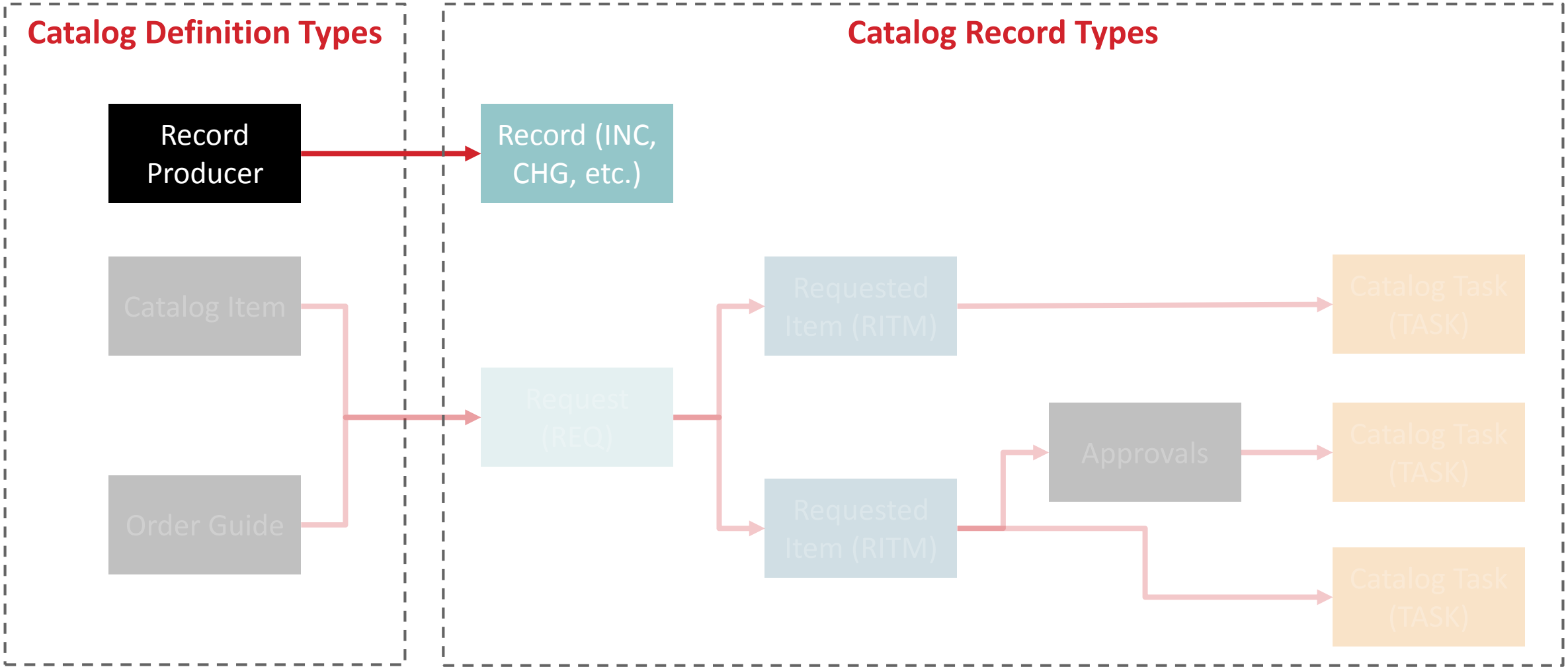
- Allows a customer to easily create task-based records in other applications from the service catalog. Common examples include:
  - Incidents
  - HR Cases
  - Facilities Requests
  - Projects or Enhancements

- Does not have a shopping cart and an associated price.



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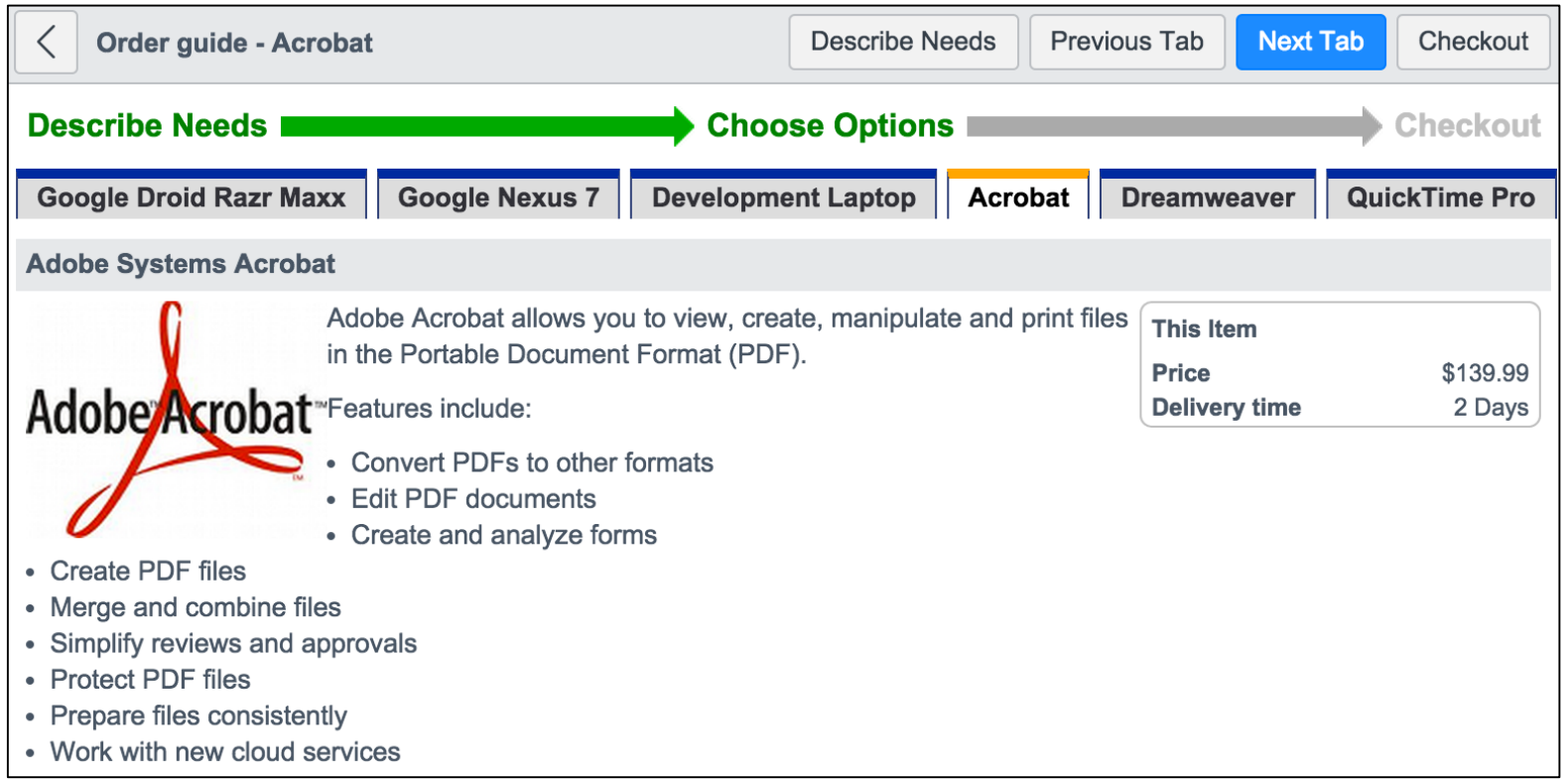
Record Producers



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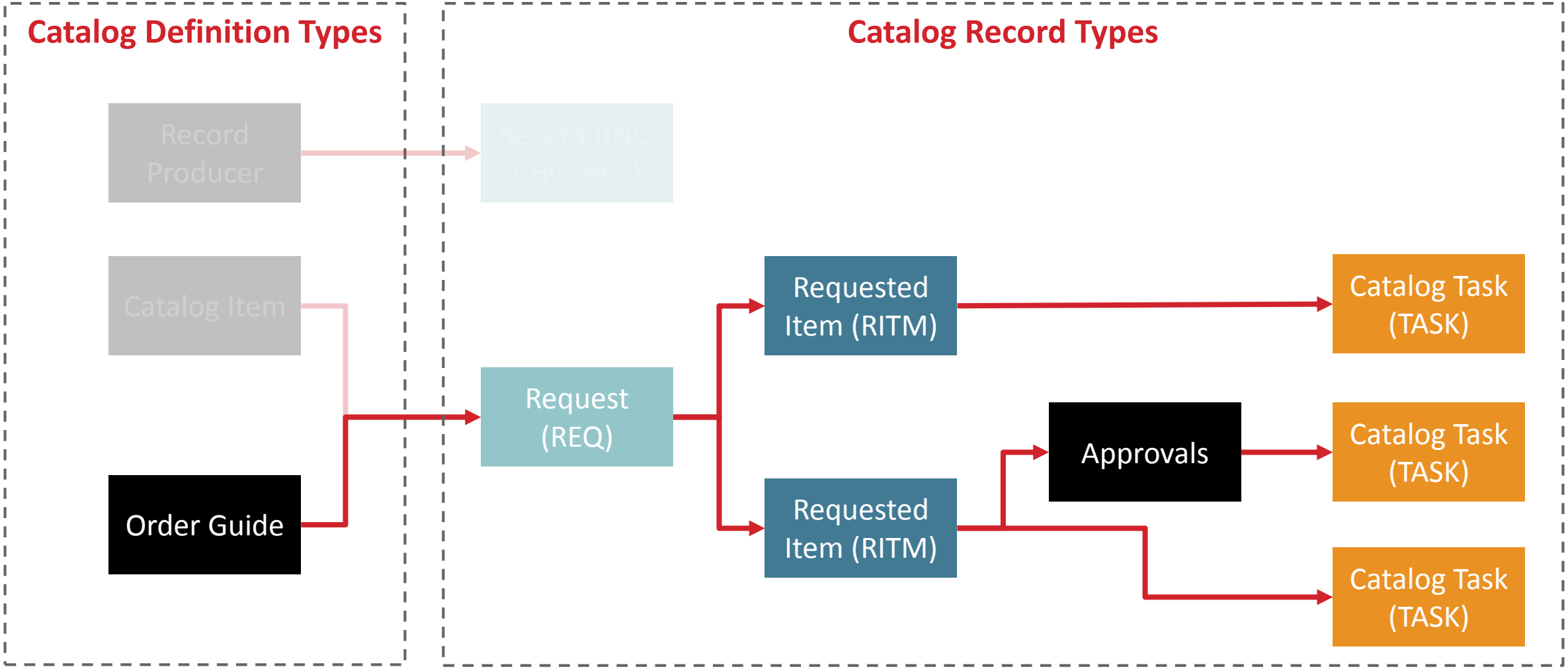
Order Guides

- Grouping multiple existing catalog items together to offer a single service.
- Allows customers to submit a single catalog request that generates several items.



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Order Guides



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Variables

- Provides the ability to capture and pass on information about choices a customer makes when ordering a catalog item.

- Can be defined to affect the order price, depending on the selected value.



iPhone 6

Product Information

A slim and stylish design makes the Apple iPhone 6 smartphone lightweight and easy-to-carry around. The Apple iPhone 6 runs on the iOS 6 s
Applications run faster and games load quickly as this black and slate Apple iPhone is powered by an A6 chip. An 8 MP iSight camera allows y
Apple iPhone 6, as it gives direct access to iTunes, so you can listen to your favorite tracks anytime. And a 4-inch retina display with 326 pixels
to watch. What's more, this 64 GB smartphone, available with AT&T services, supports Wi-Fi connectivity, so you can browse the Web, stream

Product Identifiers

- Brand: Apple
- MPN: MD644LL/A
- Model: 6
- Type: Smartphone

Key Features

- Storage Capacity: 64 GB
- Color: Black and Slate
- Network Generation: 2G, 3G, 4G
- Network Technology: GSM / EDGE / UMTS / HSPA+ / DC-HSDPA / LTE
- Band: GSM/EDGE 850/900/1800/1900 UMTS/HSPA+ / DC-HSDPA 850/900/1900/2100 LTE 4/17
- Style: Smartphone
- Camera: 8.0 MP
- Operating System: iOS

Battery

- Battery Type: Rechargeable Li-Ion Battery
- Battery Talk Time: Up to 480 min
- Battery Standby Time: Up to 225 hr

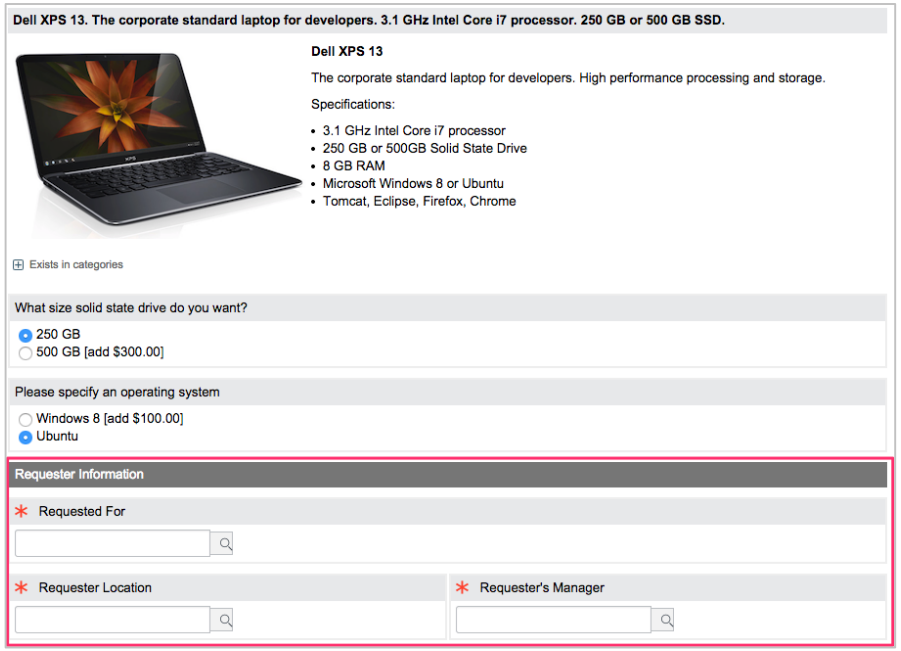
▶ Exists in categories

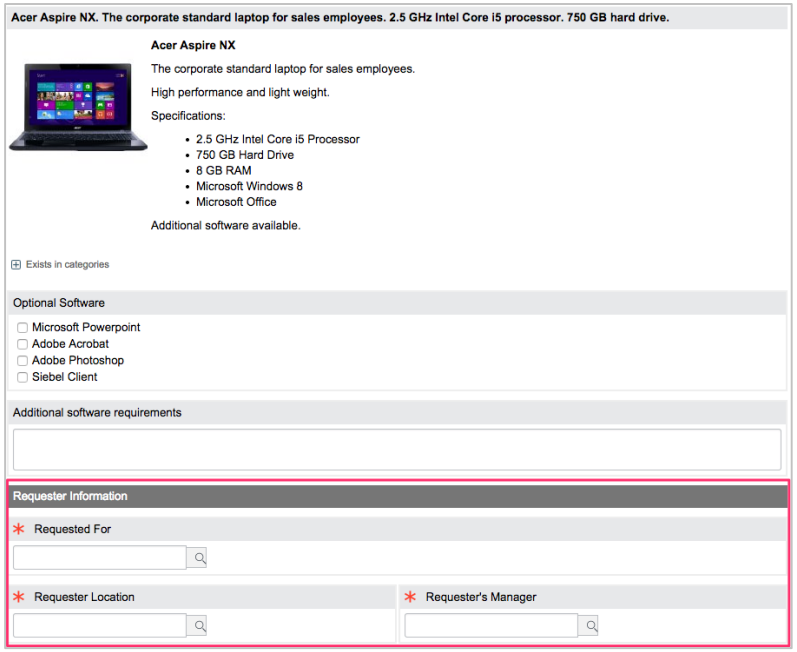
Monthly data allowance	-- None --
Contract duration	12 Months
Color	Black
Storage	64GB

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Variable Sets

- Variables that are grouped together and are shared between multiple catalog items or order guides.
- Changes made to a variable set affect all items that use the variable set, allowing you to change the set once, then apply the changes to all items using that set.





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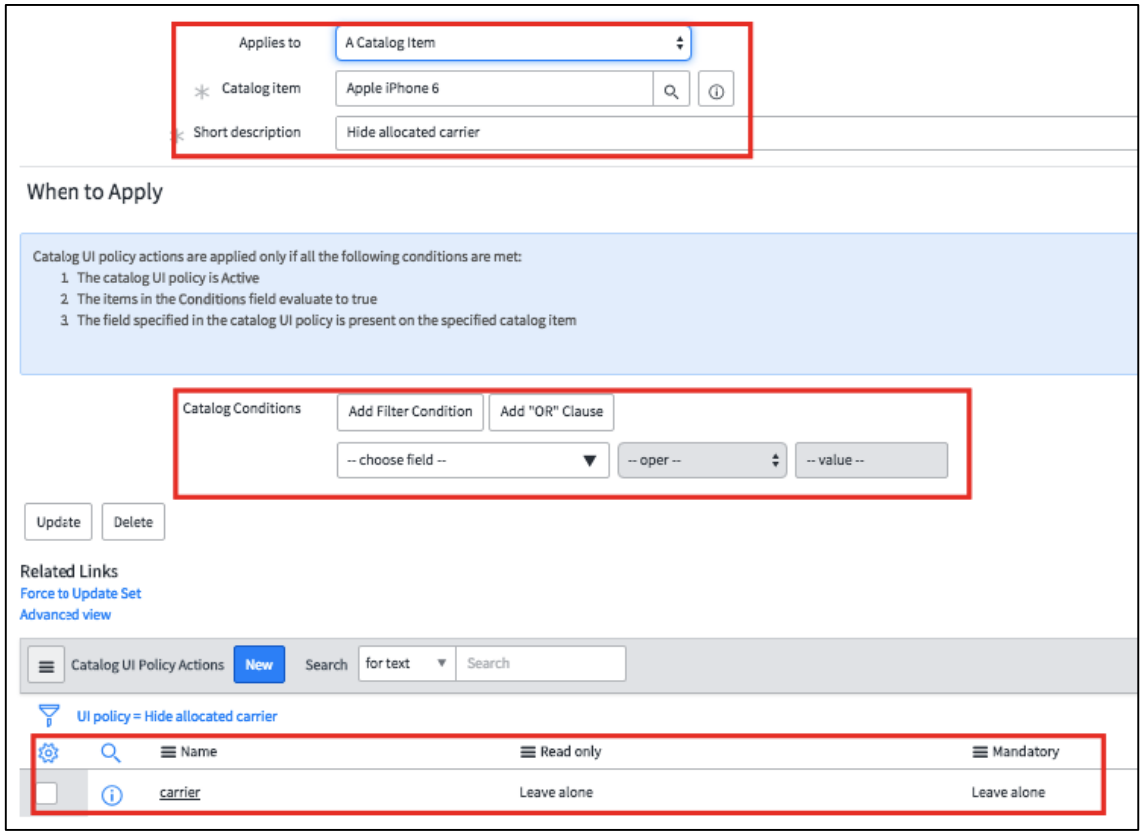
Catalog UI Policies

- Catalog UI Policies just like standard UI Policies offer an alternative to client scripts for dynamically changing information on a form.
- They also can be used to define custom process flows for tasks.
- Keep the following points in mind when creating service catalog UI policies:
  - Applies to either a specific catalog item or any item that uses a specific variable set.
  - Can only contain and reference variables that are defined for the catalog item or variable set.
  - The variables in a service catalog UI policy condition must be visible (even if hidden by UI policy or read-only) on the form for the condition to be tested.
  - Applied to variables and variable sets of items in the service catalog.

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Catalog Policies

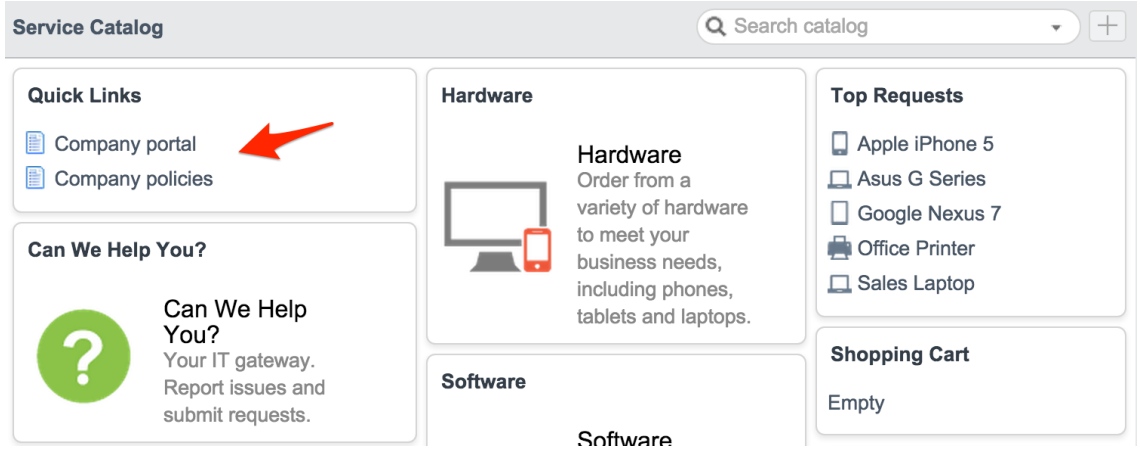
- Specify which Catalog Item the policy will apply to.
- Specify the condition for when the policy can run.
- Set the action that should take place when the condition is met.



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Content Items

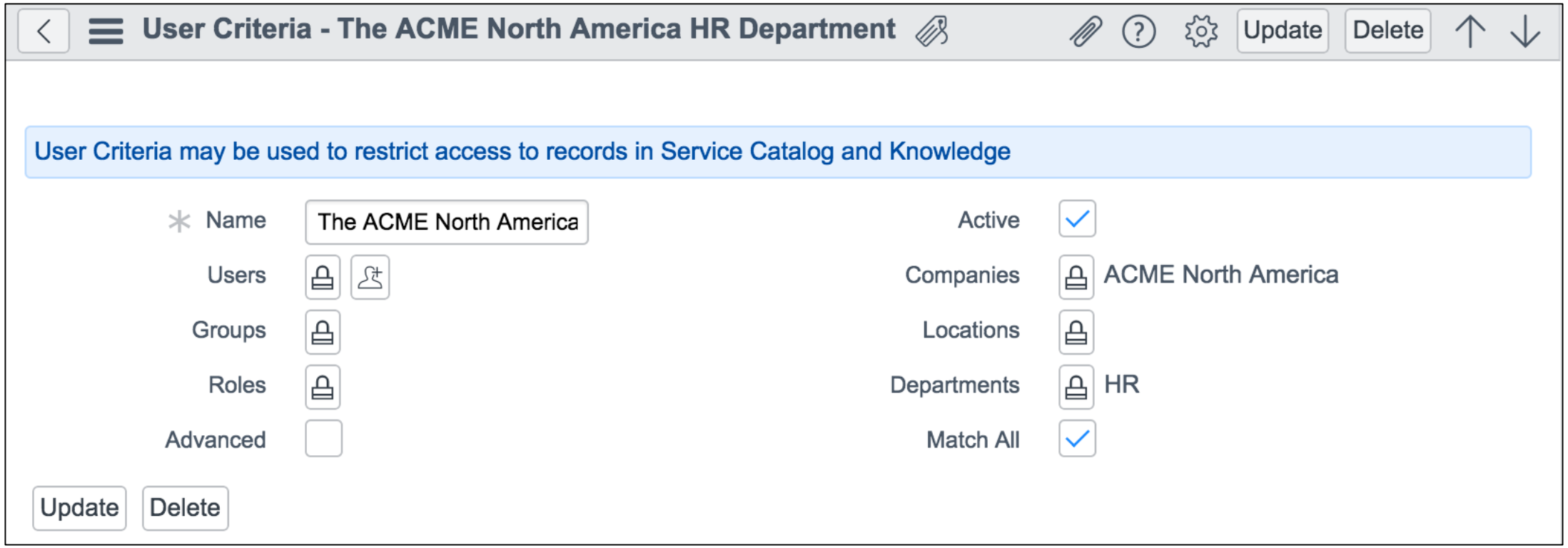
- Content items are service catalog items that provide information instead of goods or services.
- Content items may reference knowledge articles, static blocks of text, or external web-based content.
- Allows links to be placed in your service catalog or home pages.



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Service Catalog Access Controls (User Criteria Records)

- Control access to content in the service catalog by creating and applying user criteria records.



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Customizing Cart Layouts

- Provides the ability to configure the layout and functionality of the service catalog cart used in your organization to place requests for catalog items.

- Configurable Components
  - Remove components – hide prices throughout the cart if your catalog does not use pricing.
  - Change labels – change the Order now button label to Request Item in the shopping cart.
  - Change the order of elements – change the order of the columns on the order status screen.
  - Configure, hide, or create functionality – add a Requested For reference field to the shopping cart.

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Checkout

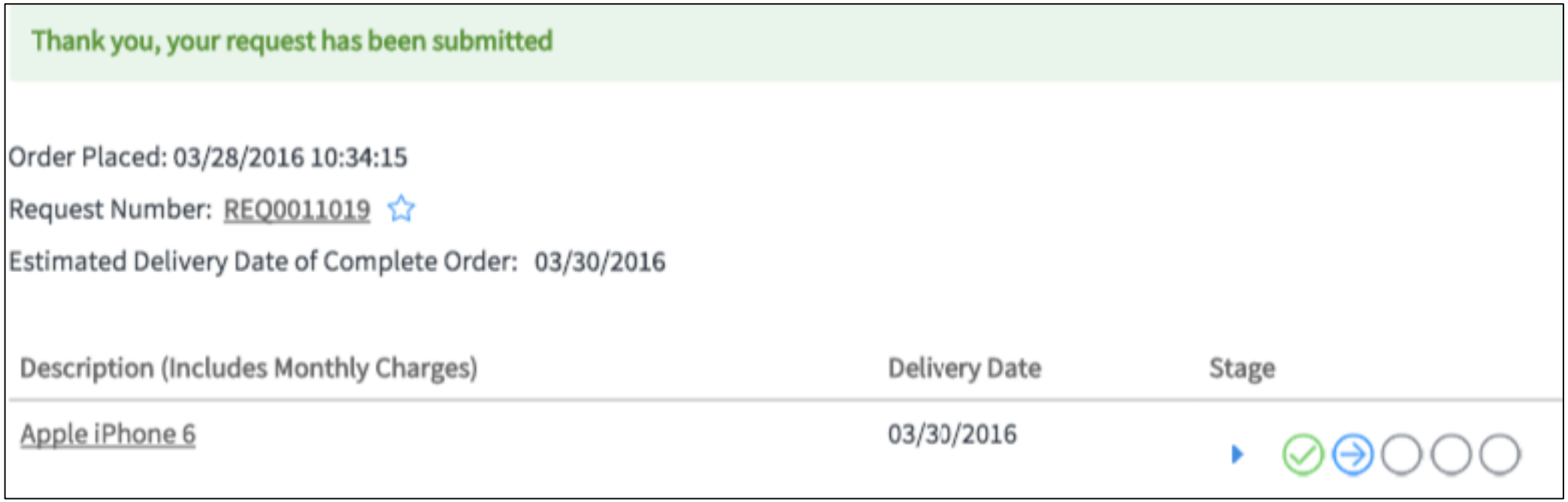
- Customers may view the items in their cart and verify the options they chose prior to checking out.

	Item (Includes Annual Charges)	Delivery Time	Price (ea.)	Quantity	Total
Delete Edit	Sales Laptop - Acer Aspire NX. The corporate standard laptop for sales employees. 2.5 GHz Intel Core i5 processor. 750 GB hard drive. Optional Software Microsoft Powerpoint true Adobe Acrobat true Adobe Photoshop true Siebel Client true Additional software requirements	5 Days	$1,100.00 +$100.00 Annually	1	$1,100.00 +$100.00 Annually
				Total	$1,100.00 +$100.00 Annually
Continue Shopping					Checkout

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One-Step Checkout Model (Default)

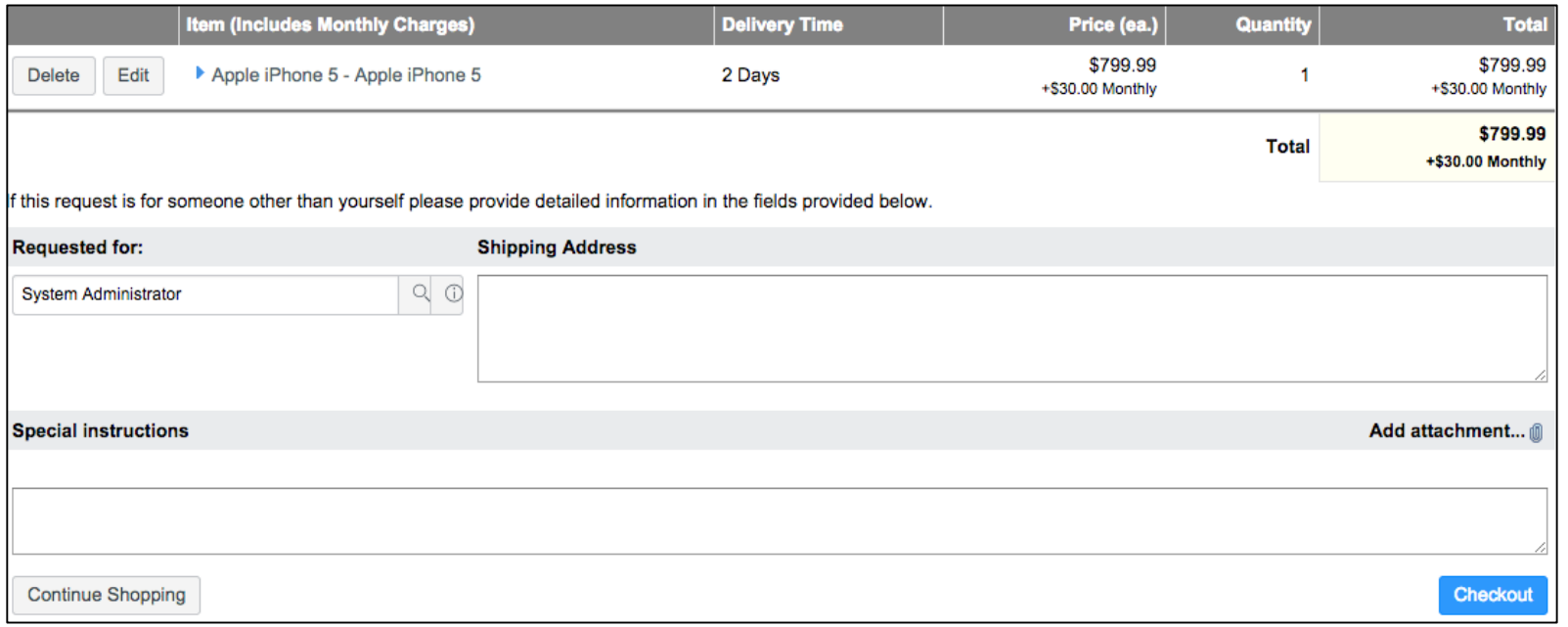
- The service catalog defaults to a one-step checkout model.
- When a user clicks Proceed to checkout or Order now, items in the shopping cart are ordered and the order summary or status screen appears.



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Two-Step Checkout Model

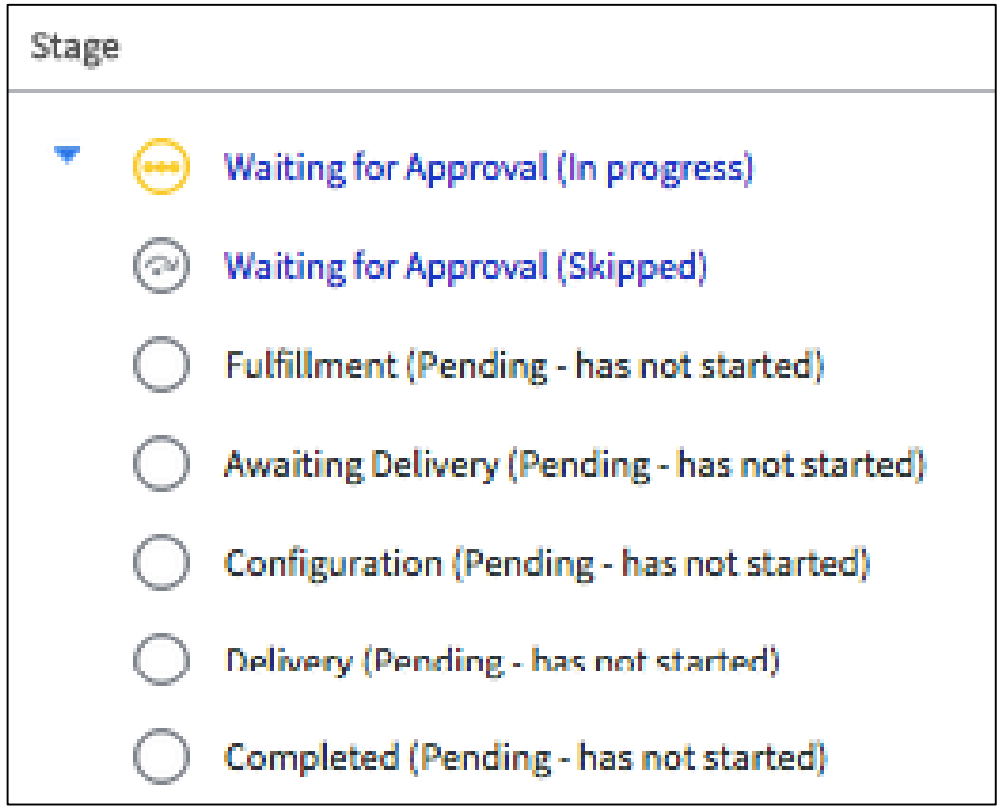
- The service catalog also supports a two-step checkout model.
- Under this model, when a user clicks Proceed to checkout or Order now, an order confirmation screen appears, allowing the user to edit the order, choose a delivery location, or upload an attachment before submitting the order.



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Order Status

- Customers are provided a visual depiction of their order status, as well as, an overall expected delivery date which can be driven by a workflow.



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Lab

- Lab 1.3 Create a Catalog Item

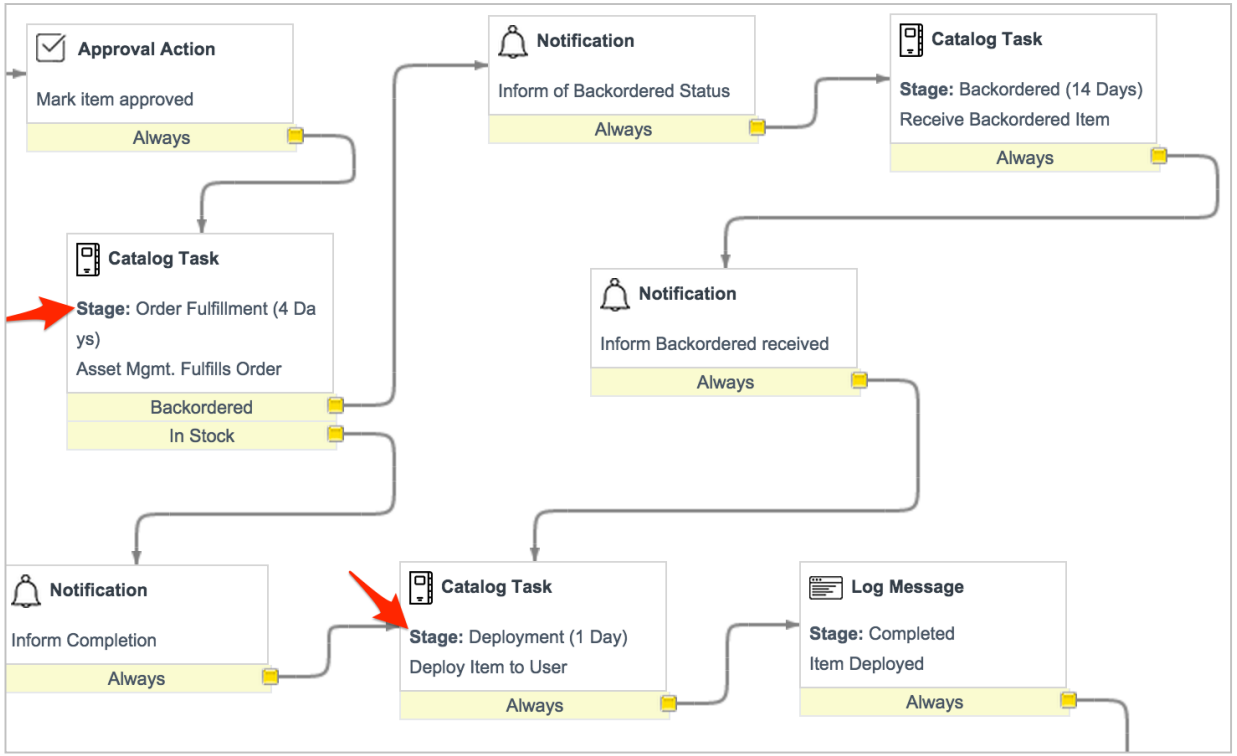
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Workflows Run the Show

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Stages

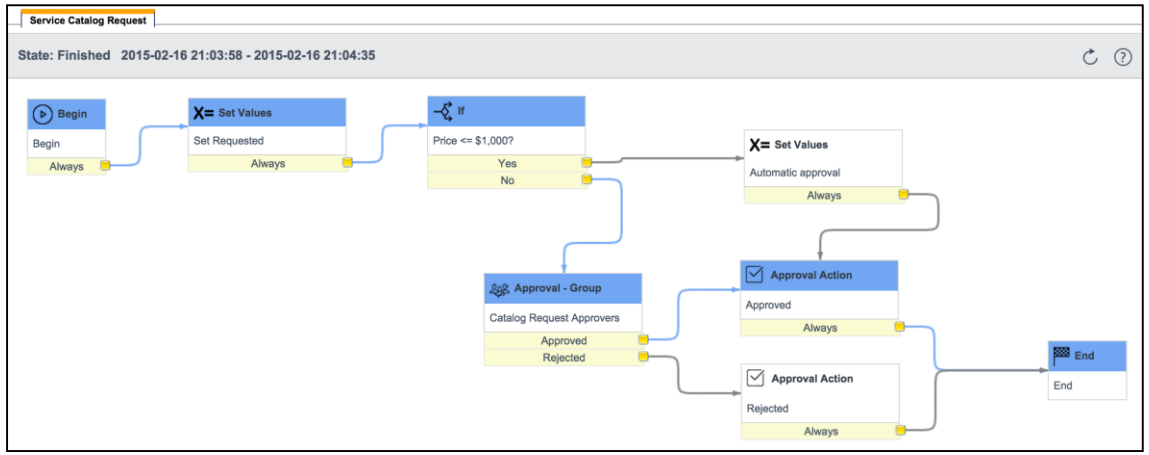
- Workflow stages are used for the following:
  - Provide summary-level feedback about the progress of a workflow.
  - Dictate task creation at specified times per condition.

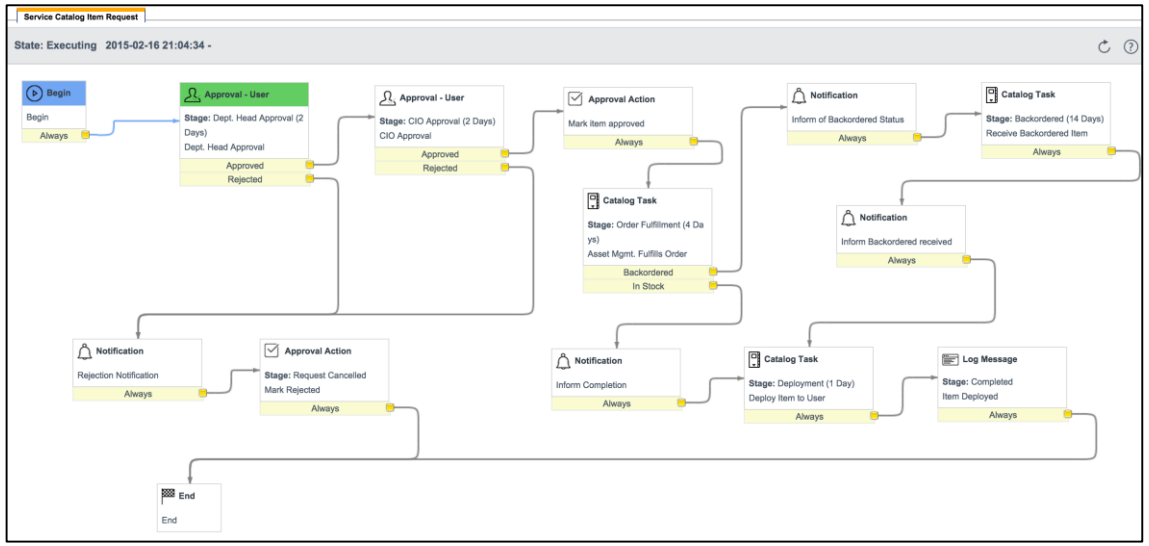


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Workflows

- Request Level
  - Must be completed before a separate Requested Item workflows begin.
- Requested Item Level
  - Each requested item may also invoke a separate workflow.

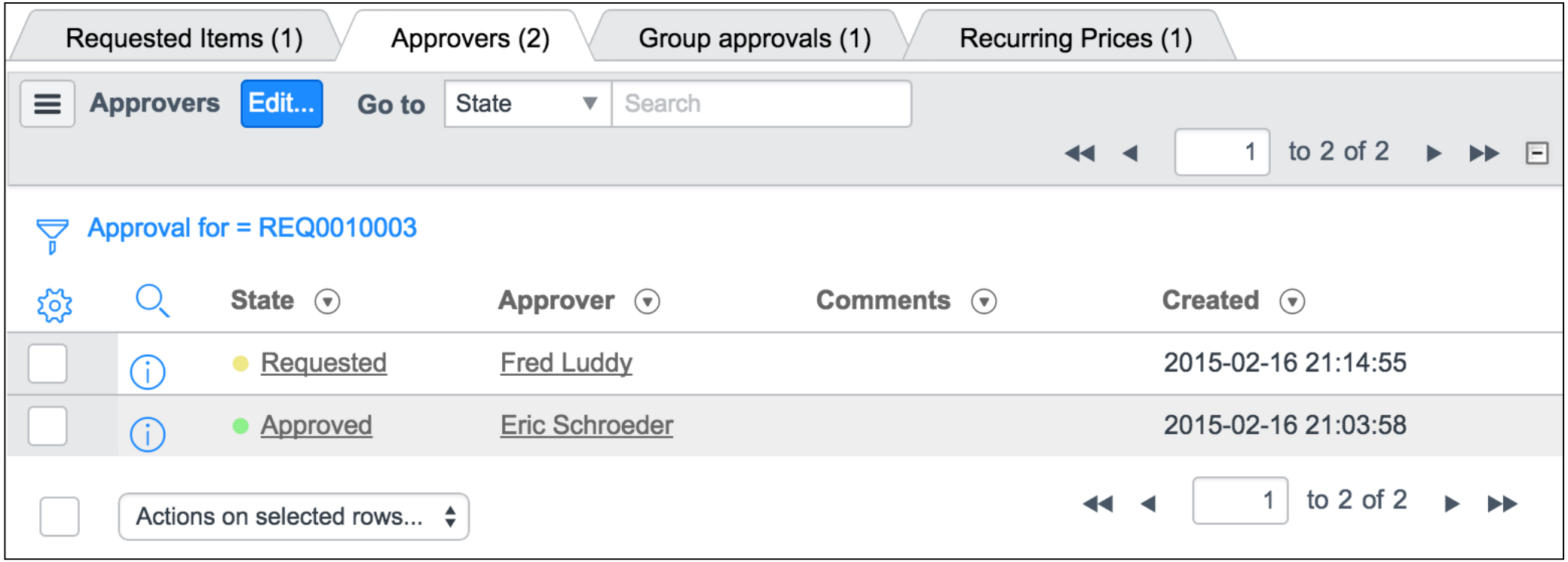




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Approvals

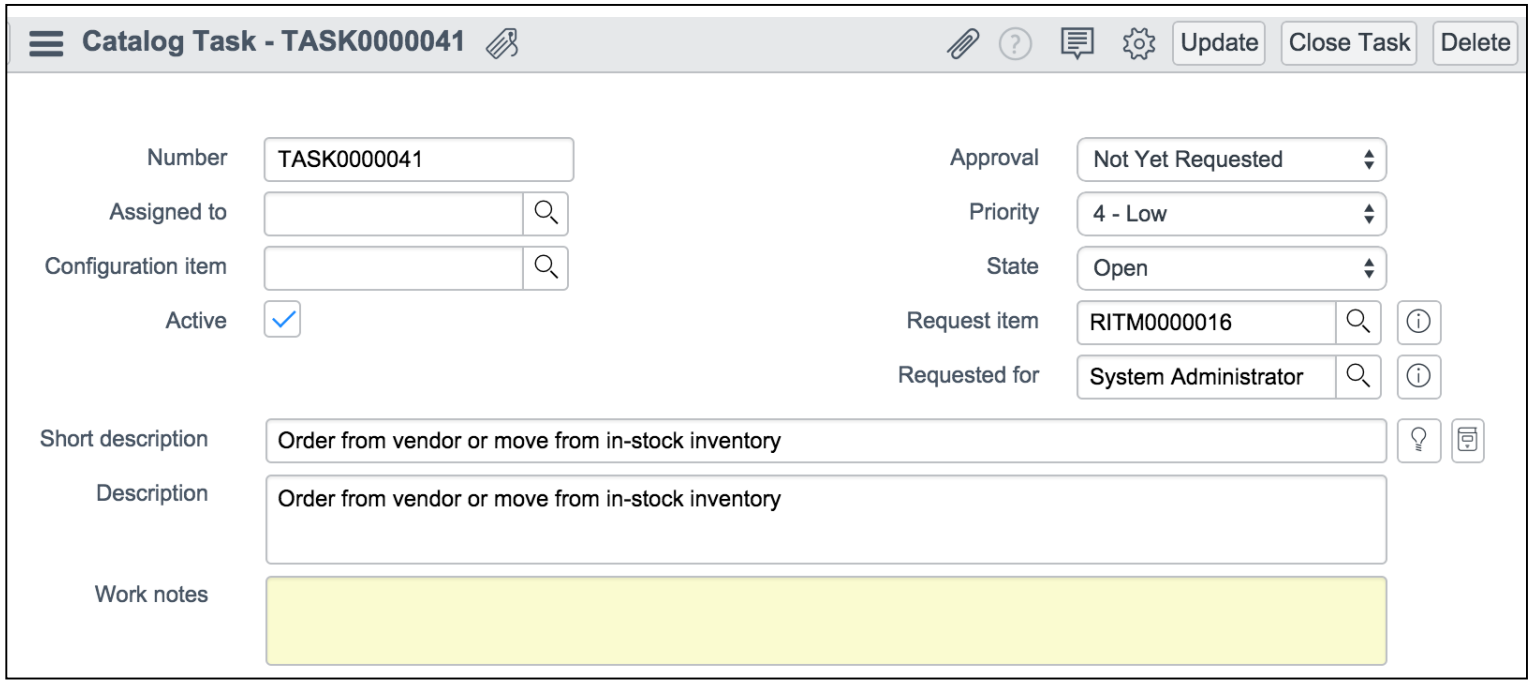
- Approvals can be set to specific employees or groups depending on the requested item.



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Catalog Tasks

- The requested item may generate one or more catalog tasks.
  - These tasks may be assigned to various teams and individuals to procure, configure, and deliver the item(s) to the customer.
  - Tasks can be created in parallel or dependency.



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Lab

- Lab 1.4 Create a Workflow

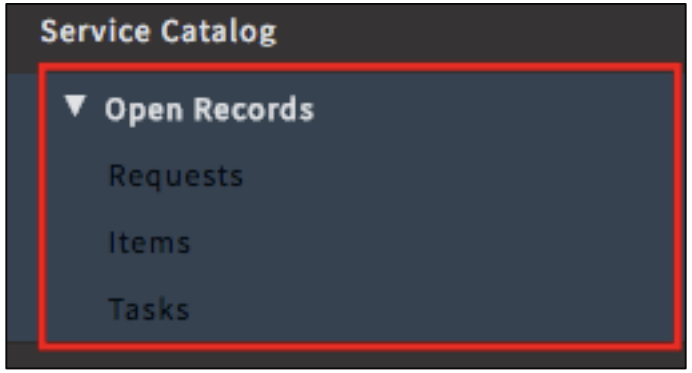
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Fulfilling the Requests

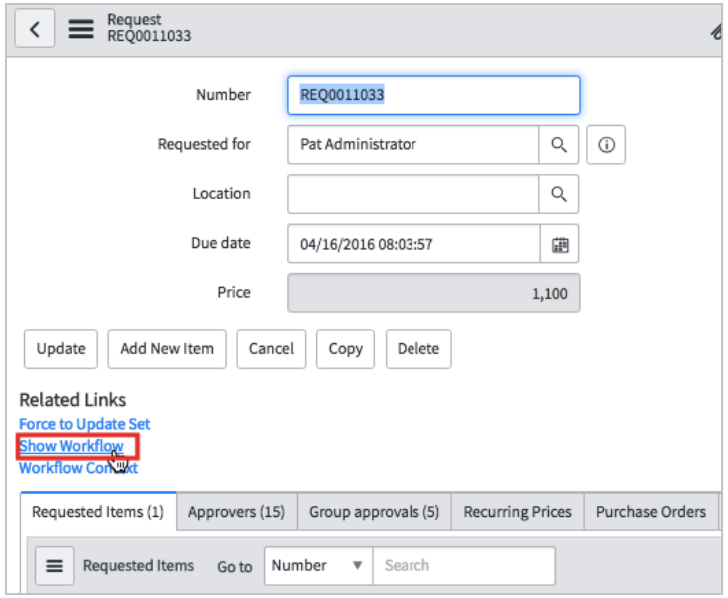
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Understanding the Requests

- Know how to locate the requests and determine the status.
- Ensure that fulfillers of requests can comfortably look at the workflow and check for approvers and/or tasks.
- Perform checks as needed against email notifications sent by the system.







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Lab

- Lab 1.5 Fulfilling the Request
- Lab 1.6 Checking System Notifications (Optional)

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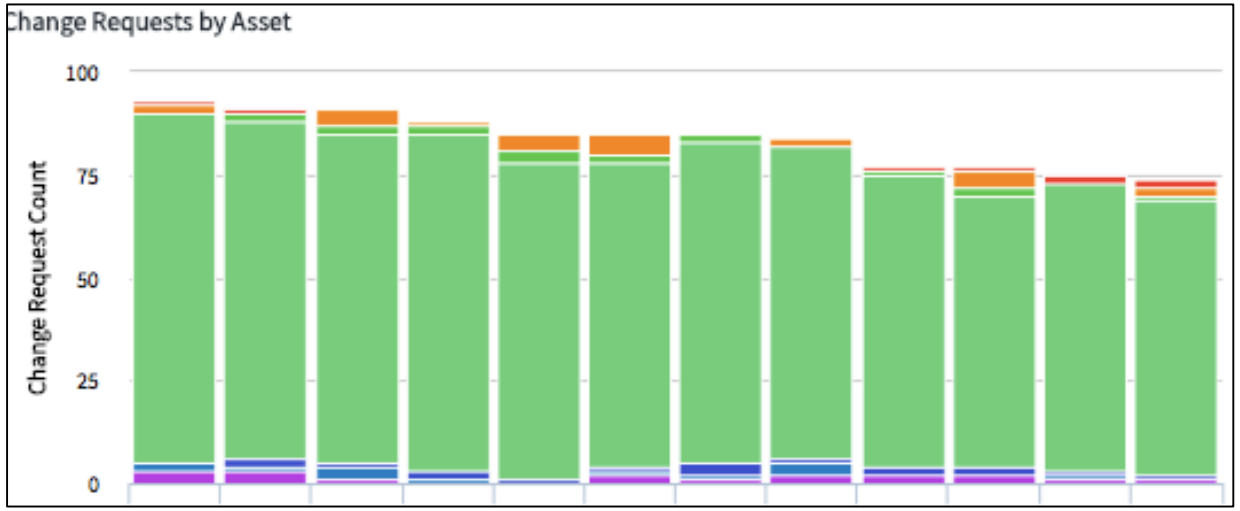
Running Reports

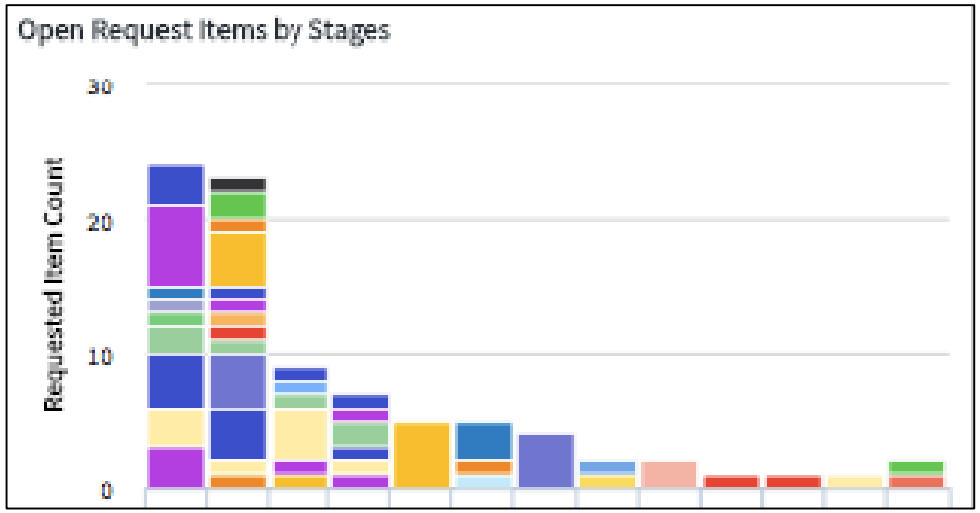
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Reports

- Reporting is a requirement organizations have but cannot always get accurately or in a timely manner.
  - Auditing requires a copy of approvals for controlled applications.
  - Management needs real-time reports for purchases made by department.
  - Finance must be able to track purchases back to vendors for purchase orders.

How to make a report

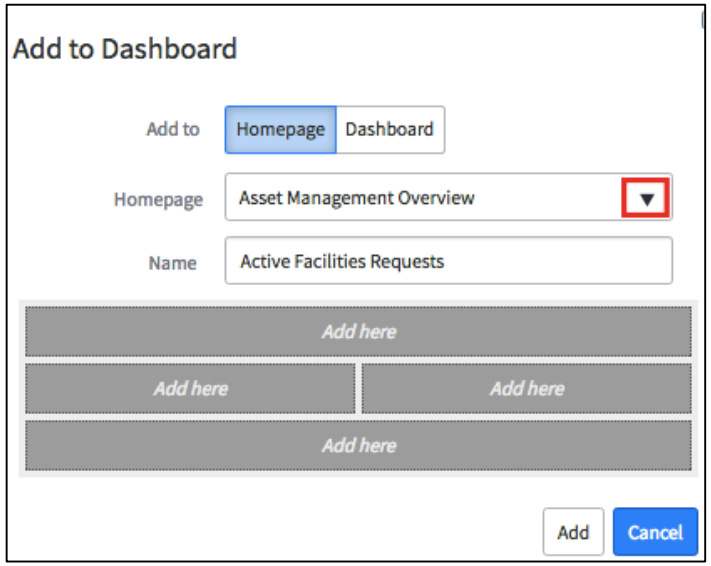


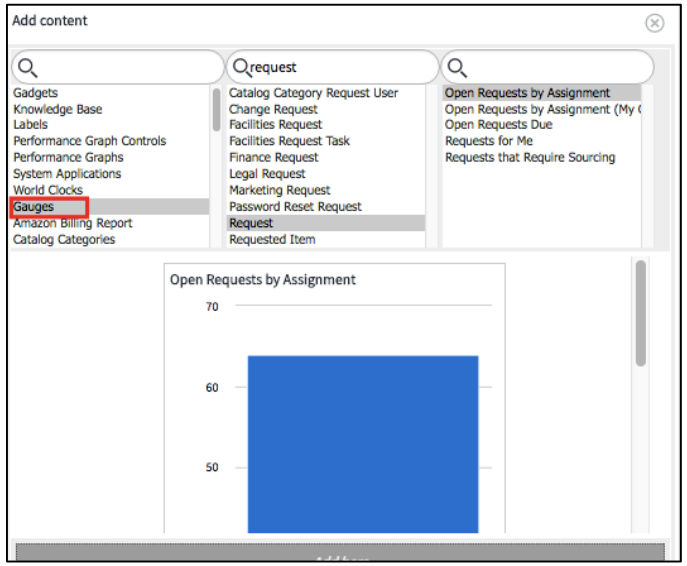


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Dashboards and Gauges

- ServiceNow offers dashboards for simplistic visual views of relative data.
  - Dashboards are added to specific homepages, so anyone with the homepage will see the dashboard added.
- Gauges can also be created from reports but are not tied to any specific homepage.
  - Gauges are available for addition to any homepage when desired.

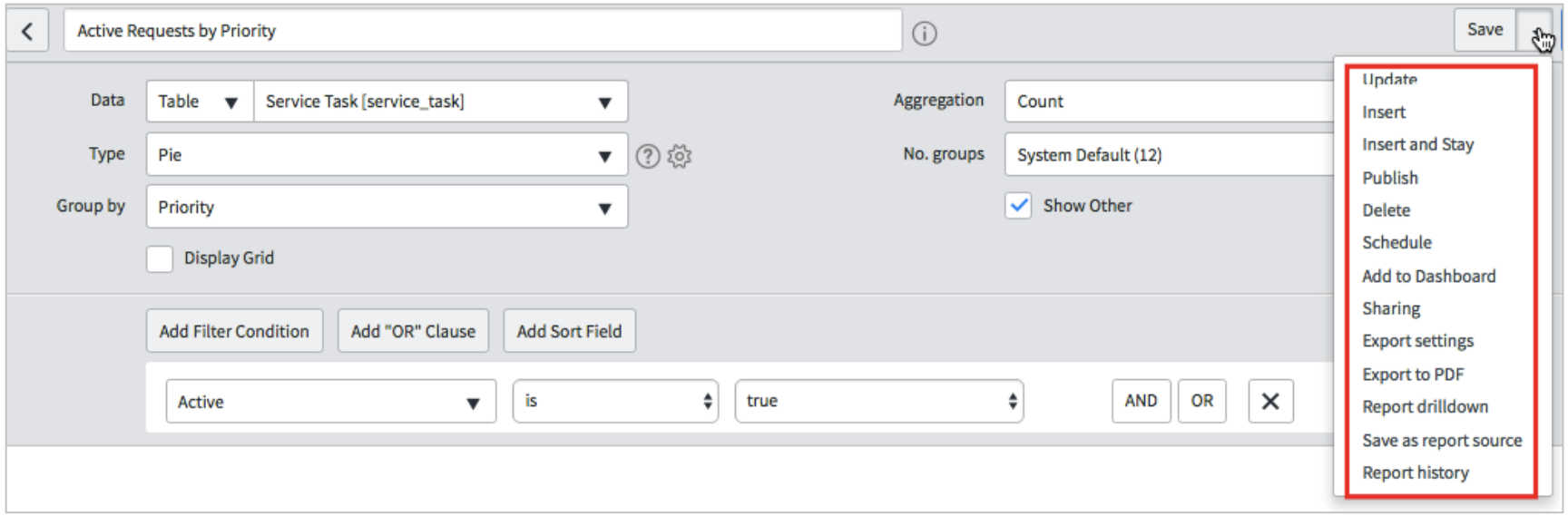




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Running and Scheduling Reports

- Out-of-the-box reports offer numerous reports but can be manipulated to create additional reports as required by the organization.
  - Any field within the system is reportable.
- Reports can be run on a pre-defined schedule and emailed out to intended recipients.
  - Internal and/or external recipients can be selected.



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Lab

- Lab 1.7 Auditing Reports

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Top Takeaways

1

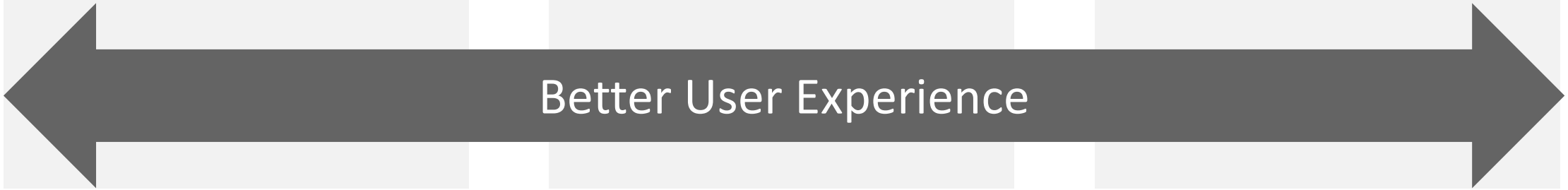
The Service Catalogs are the best way for employees to submit requests.

2

Intuitive Service Catalogs will drive customer adoption and satisfaction.

3

Standardizing the fulfillment processes will save everyone time and effort.



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Thank You

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Hilton Rosenfeld
Solution Architect
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