knowledge14
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Lab Guide

Service Catalog 101: Build Relationships One Item at a Time

Eric Hemmer & Michael Brown

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

Login / Passwords:

admin / Knowledge14

itil / Knowledge14

employee / Knowledge14

Definition of Service Catalog

A service catalog provides a customer-facing view of available service and product offerings provided by departments within the organization. This allows organizations to promote these offerings in a structured and easily navigable way, and encourages customers to access the catalog to serve their own needs.

Presentation & Demonstration of Concepts

This lab covers the following information:

- IT Service Catalog versus Business Service Catalog
- How to plan your Service Catalog strategy
    - Standardizing processes
    - Re-using common workflows
    - Consolidating variable sets
- General Catalog Concepts
    - Homepage
    - Shopping Cart
    - Categories
        - Renderer
        - Default
    - Catalog Items
    - Record Producers
    - Content Items
    - Order Guides

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- Request Fulfillment Process
    - Customer experience
        - Add to cart
        - Checkout
        - Order status
        - Stages
    - Fulfiller experience
        - Request workflow
        - Requested item workflow
        - Approvals
        - Catalog tasks

Theme

An IT Service Catalog typically provides employees with a one-stop shopping experience to order hardware or software, submit incidents or report defects to IT, or look up information in the knowledge base. ServiceNow also allows you to create service catalogs for other service centers in addition to IT (for example, Human Resources, Facilities, Marketing, and Legal). We chose Facilities as the example theme for this lab. All of the techniques learned in the lab apply to any of the catalog listed above.

Scenario

A sales rep needs to set up a meeting with prospective customers to sell brake pads. This lab explains how to provide a service catalog that makes sure the meeting goes well. In this lab scenario, the conference room is too hot so the sales rep uses the service catalog to engage Facilities to fix the climate control. In the Service Catalog 201 Lab, the sales rep uses the service catalog to coordinate the meeting and cater it.

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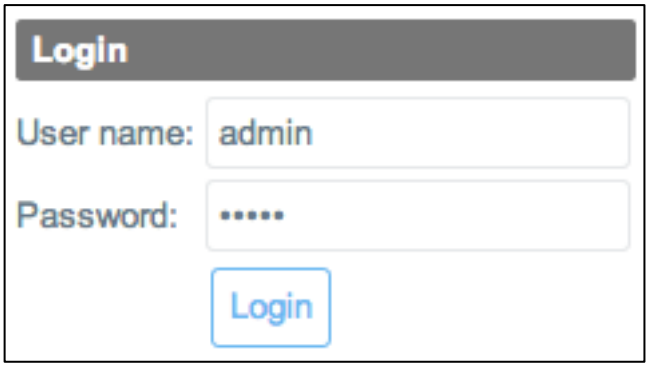
Lab Goal

This lab explains the process of creating a Category in the Service catalog.

Lab 1
Create a Category

Log on to Your Training Instance.

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

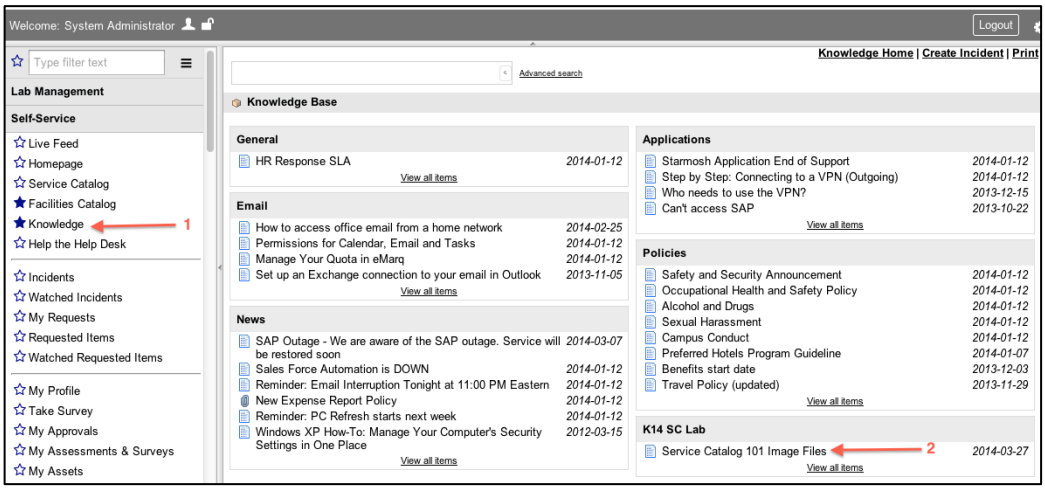


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Download Icons and Graphics

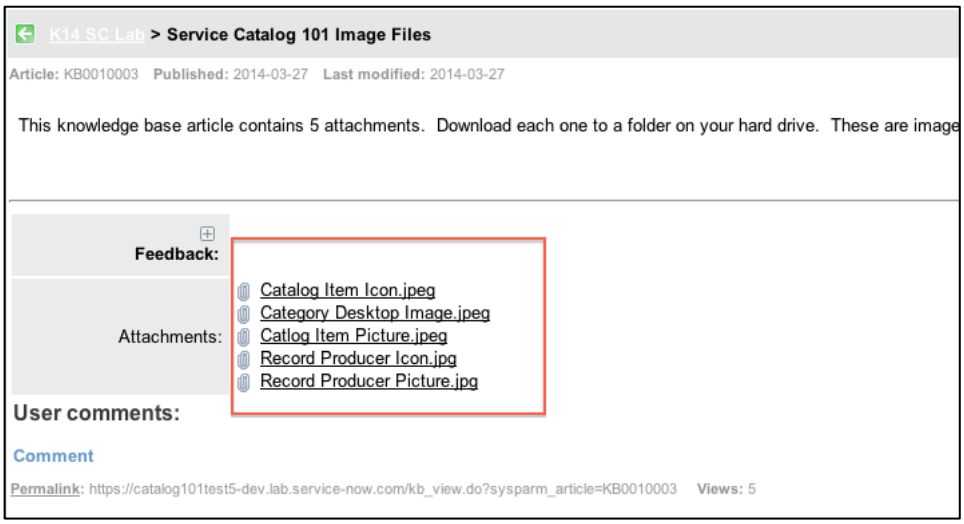
1. Download icons and graphics from the Knowledge Base by following these next steps.

2. Navigate to the **Self Service > Knowledge** then click the knowledge base article in the topic header **K14 SC Lab.**



3. Click EACH of the five attachments one at a time to download the images files needed for this lab. Download all FIVE of them.

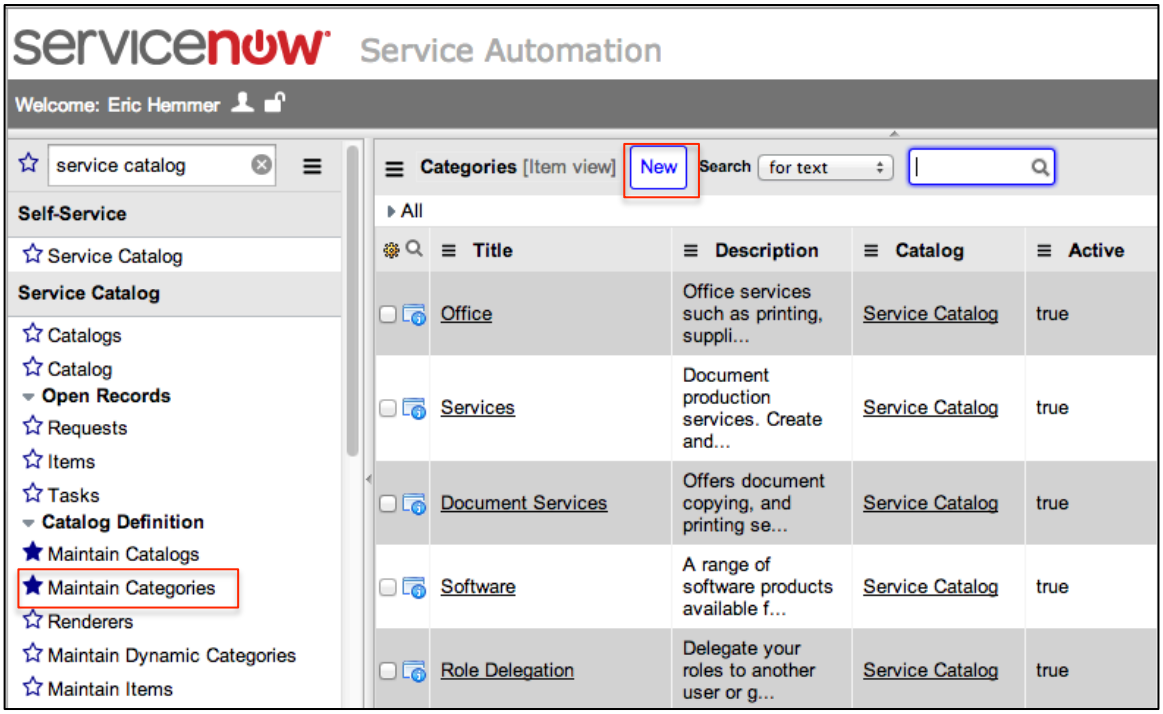
   Note the download location for future reference.



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Create a Category

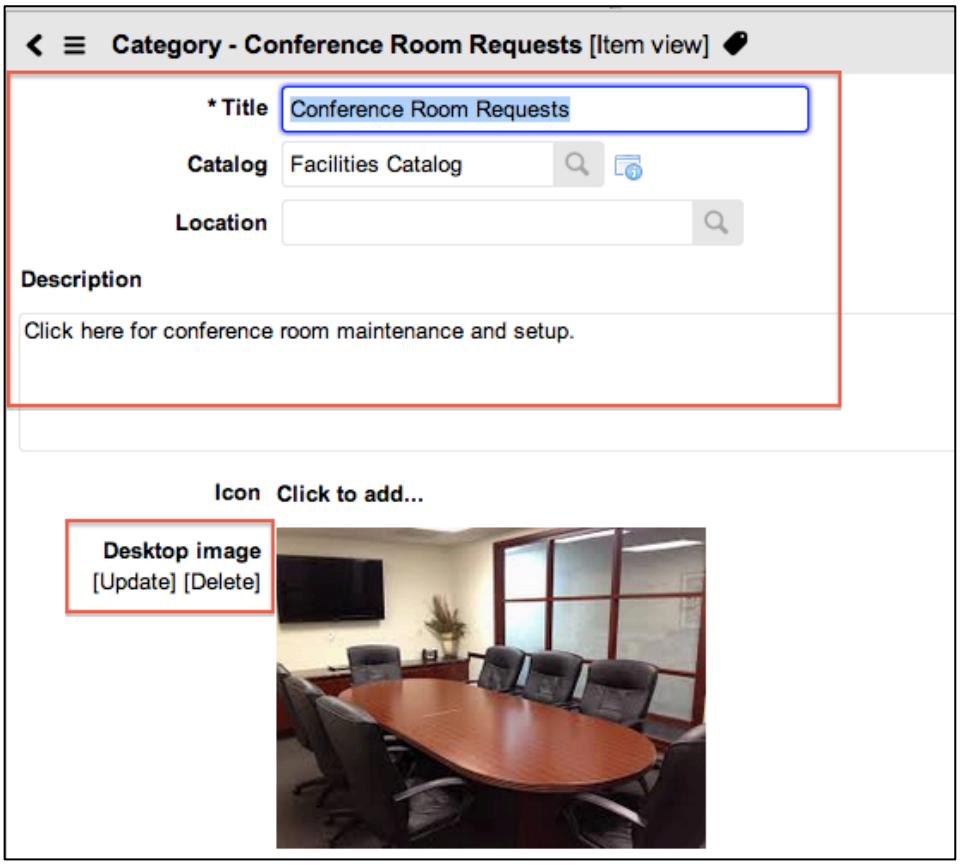
1. Navigate to **Service Catalog > Maintain Categories** then click the **New** button.



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2. Complete the form below as follows:

   Title: **Conference Room Requests**
   Catalog: **Facilities Catalog**
   Description: **Click here for conference room maintenance and setup.**
   Desktop Image: Click the **Click to add**… link and select **Category Desktop Image.jpg**.



3. Click the **Update** button.

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Lab Goal

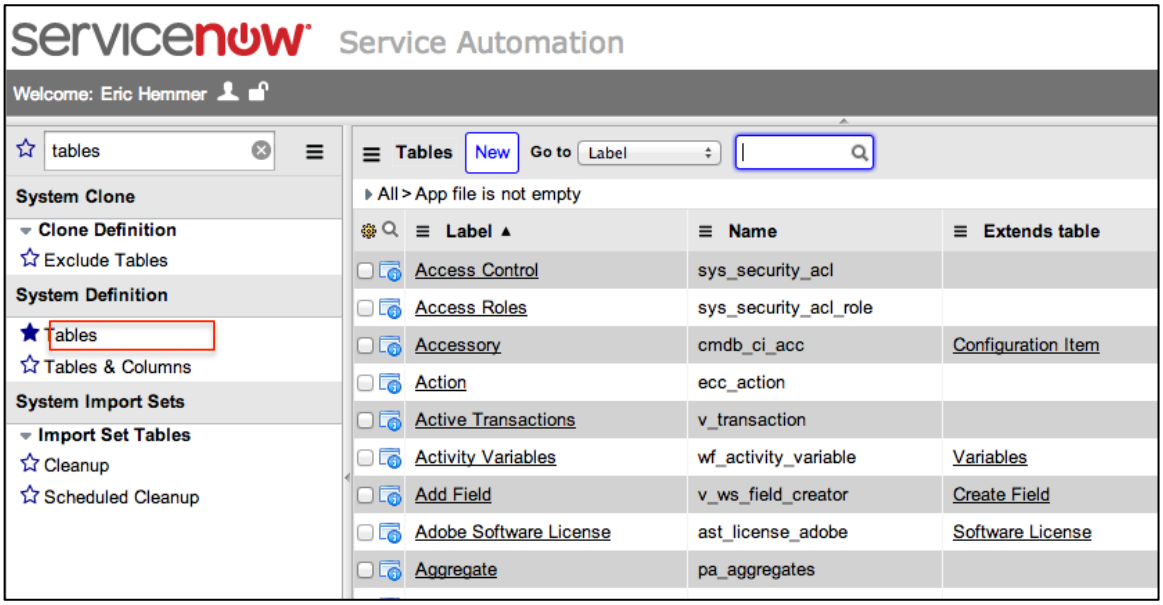
This lab explains the process for creating a record producer in the Service catalog.

Lab 2 Create Record Producer

Create a Record Producer

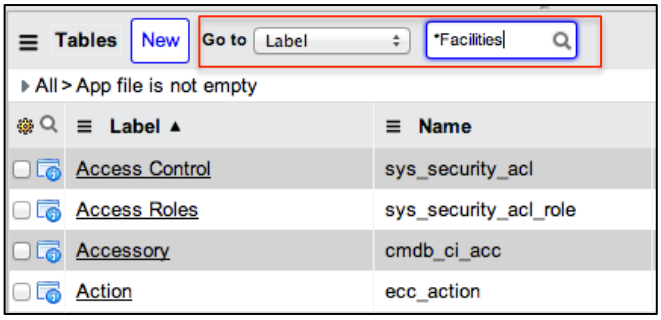
Note: For the rest of this lab, if you toggle on the tabs view, then some fields may be on separate tabs instead of separate sections of the forms**.**

1. Navigate to **System Definition > Tables**.

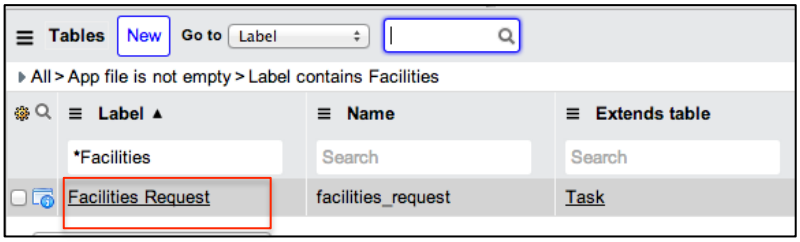


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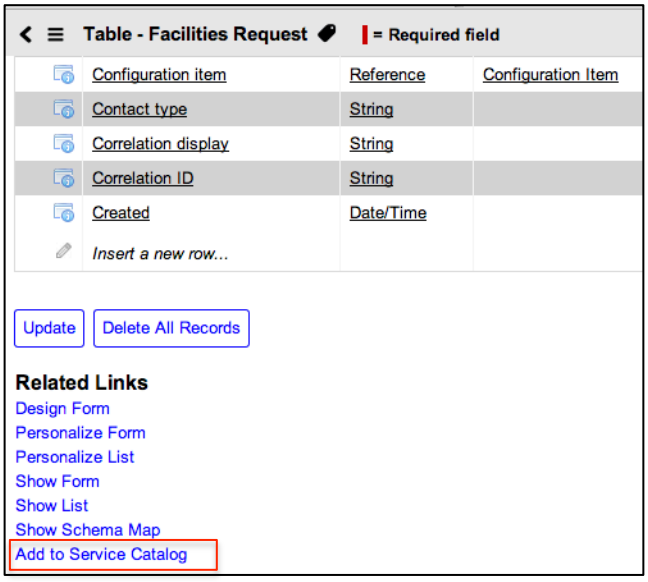
2. Filter the list of **Tables**
   Go to: **Label**
   Search box: ***Facilities**
   Click the magnifier glass to run the search.



3. Click the **Facilities Request** link.



4. Scroll to the bottom of the form and click the **Add to Service Catalog** link.



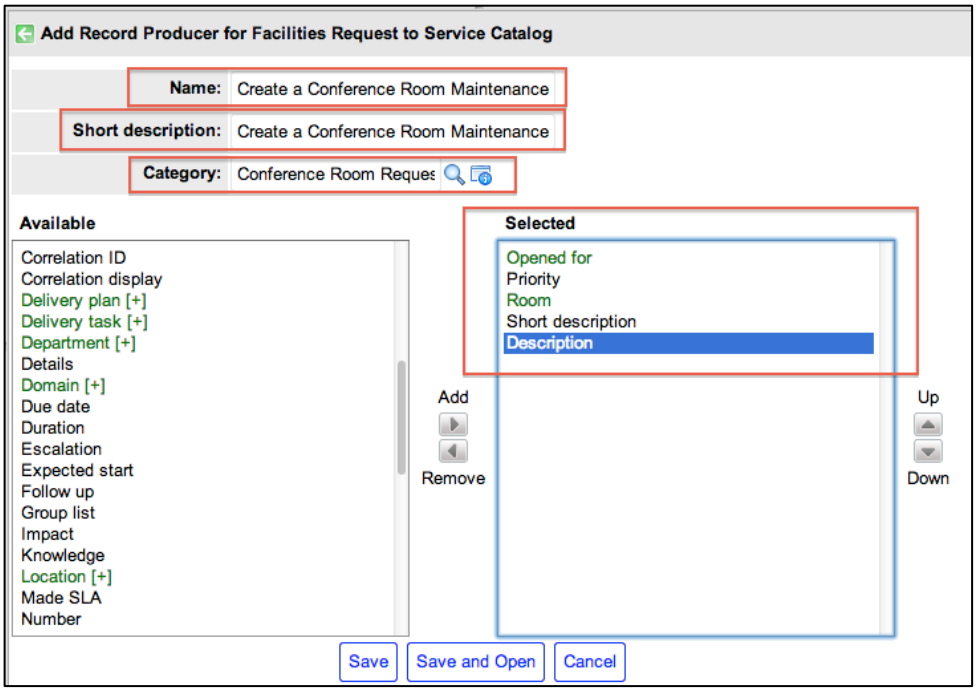
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5. Complete the form below as follows:

   Name: **Create a Conference Room Maintenance Request**
   Short Description: **Create a Conference Room Maintenance Request**
   Category: **Conference Room Requests**

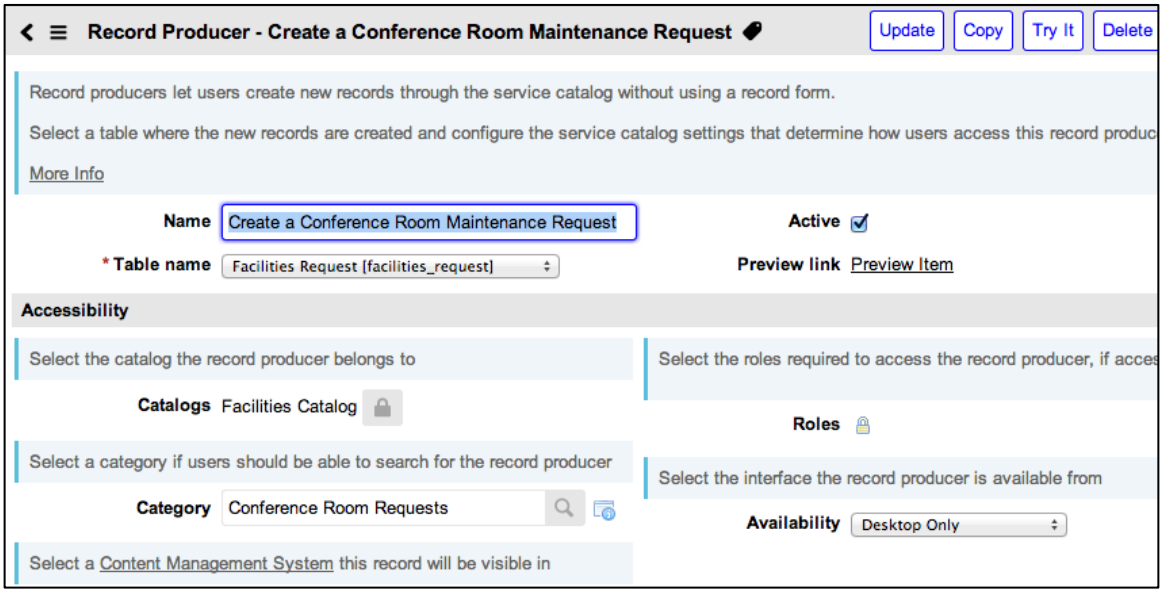
   Move the following fields from **Available** to **Selected** using the **Add** button:

   Opened for
   Priority
   Room
   Short description
   Description



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6. Click **Save and Open**. Your screen should look like this:



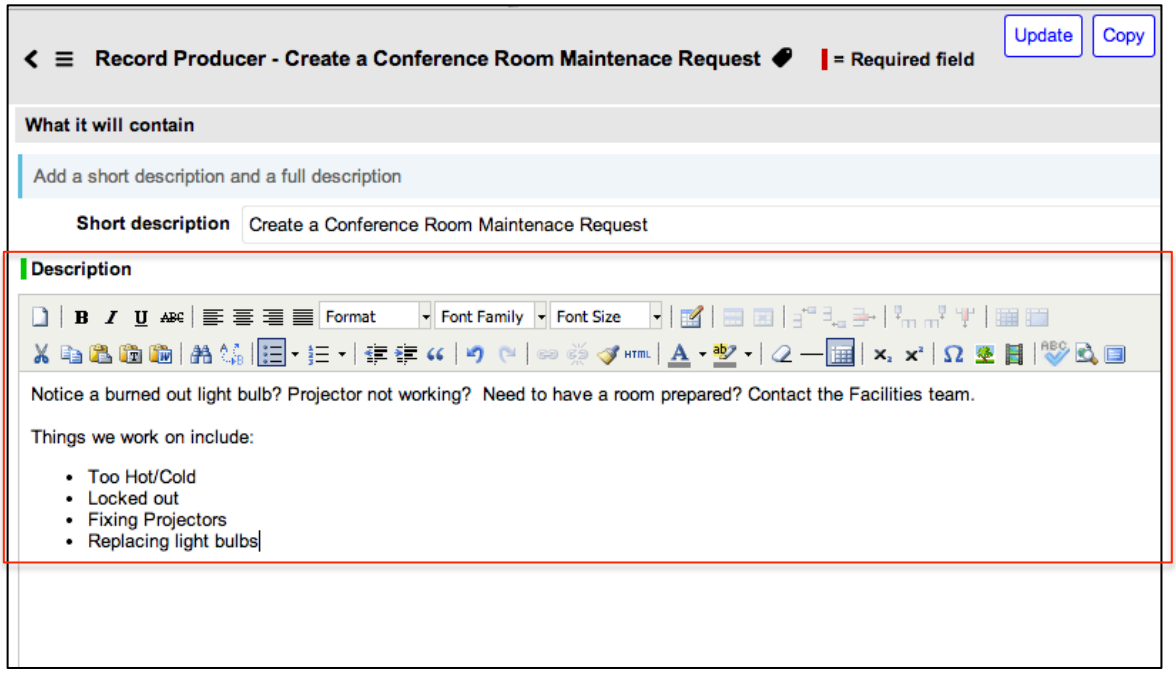
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7. Scroll down the record producer form and use the HTML editor to enter the following **Description:**

   Notice a burned out light bulb? Projector not working? Need to have a room prepared? Contact the Facilities team.

   Things we work on include:

   - **Too Hot/Cold**
   - **Locked out**
   - **Fixing Projectors**
   - **Replacing light bulbs**



Note: If you toggled on the tabs view, then some of these fields may be on separate tabs.

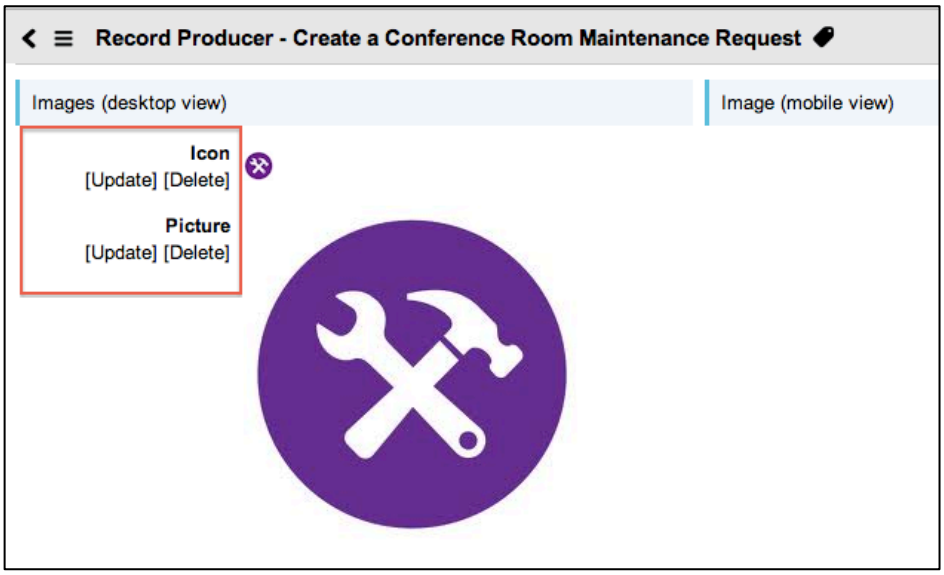
8. Right-mouse click the **Header** and click **Save**.

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9. Scroll down to the Images (desktop view) section

   Icon: **Click to add**… and select **record producer icon.jpg**
   Picture: **Click to add**… and select **record producer picture.jpg**

   Note: These are the files you downloaded at the beginning of the lab.

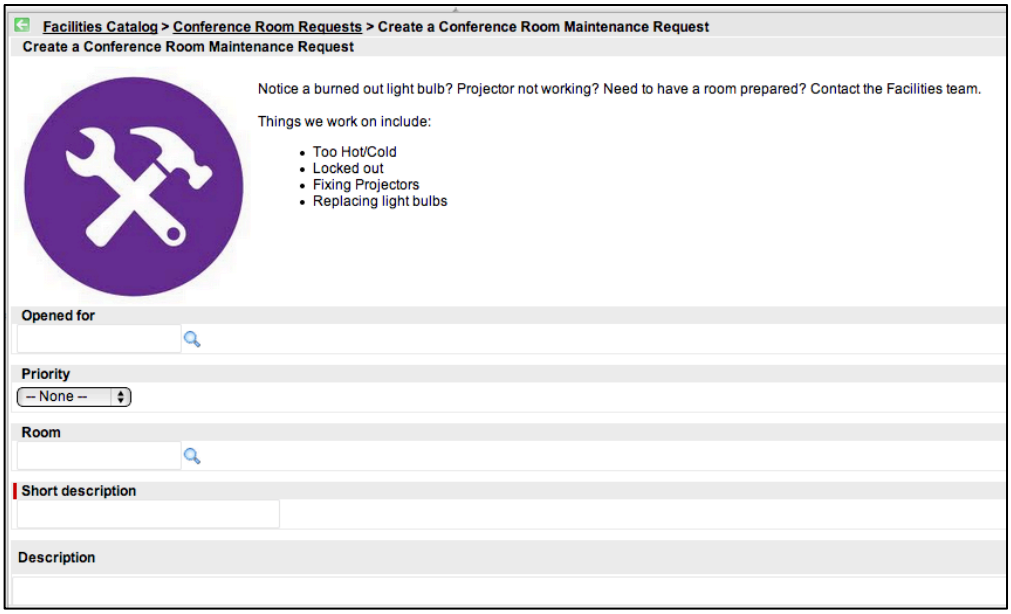


10. Click **Try It**.

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Lab Success Verification

1. Your screen should look like this.



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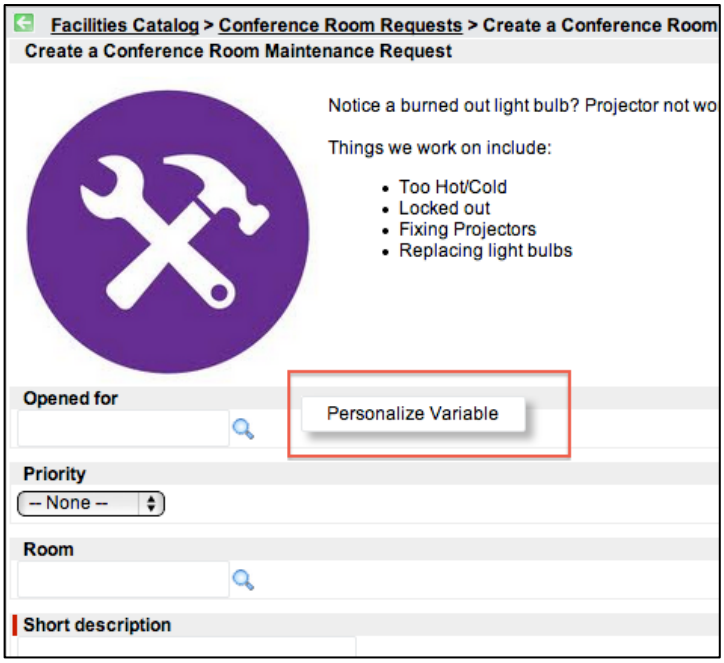
Lab Goal

This lab explains the process for configuring variables in the Service catalog.

Lab 3
Personalize Variables

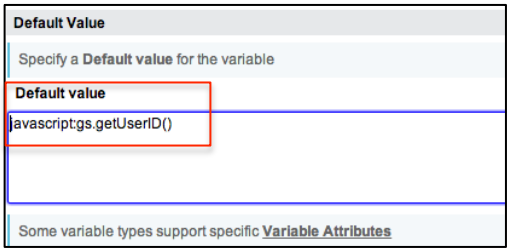
Personalize Variables

1. Right-mouse click the **Opened for** variable and select **Personalize Variables**.



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2. Scroll down and enter this default value: **javascript:gs.getUserID()**

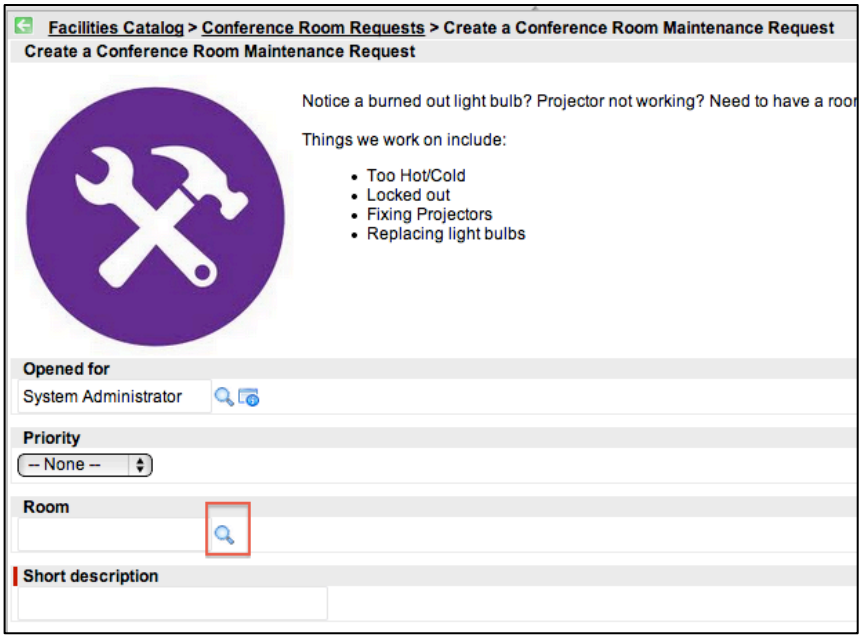


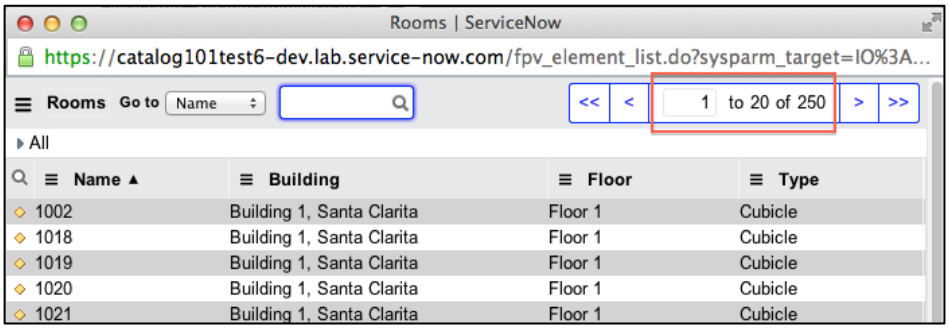
3. Click **Update**.

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Create a Simple Reference Qualifier

1. Click the **magnifier glass icon** to the right of Room.



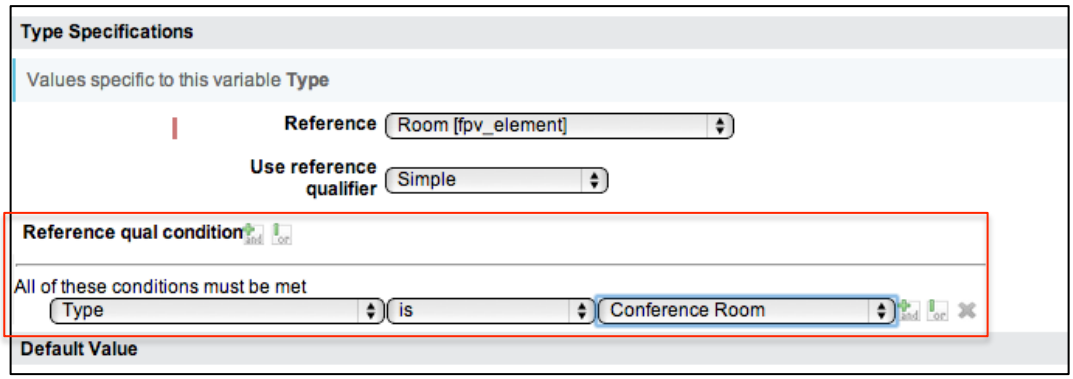


Note the number of rooms listed then close the pop-up window. Results may vary as demo data fluctuates.

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2. Right-mouse click the **Rooms** variable and select **Personalize Variables** then scroll down to the **Type Specifications** section.

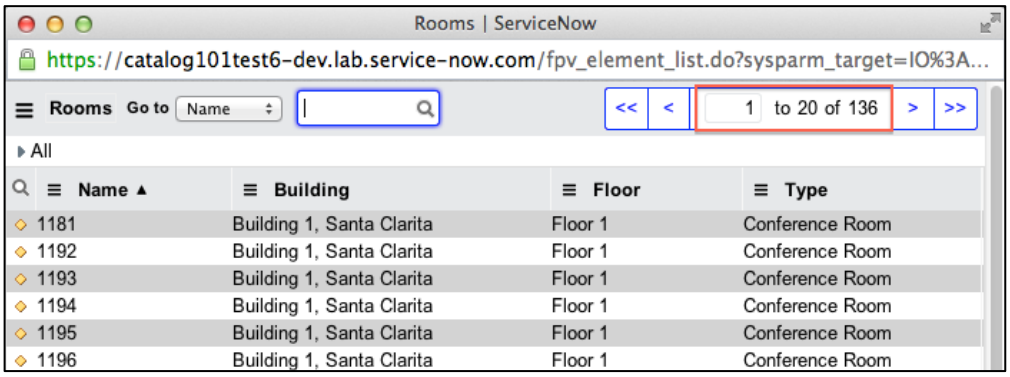
   Set the Reference qual condition: **Type is Conference Room**



3. Click **Update** to return to the record producer.

4. Click the magnifier glass icon to the right of **Rooms**.

   Note there are fewer **Rooms** listed because the filter excluded other room types. Only **Conference Rooms** are listed.

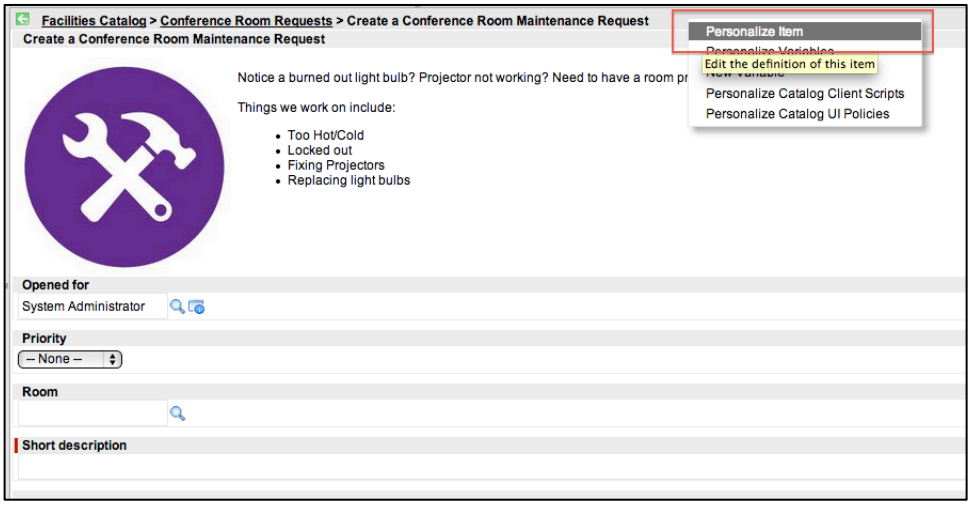


   Close the pop-up window.

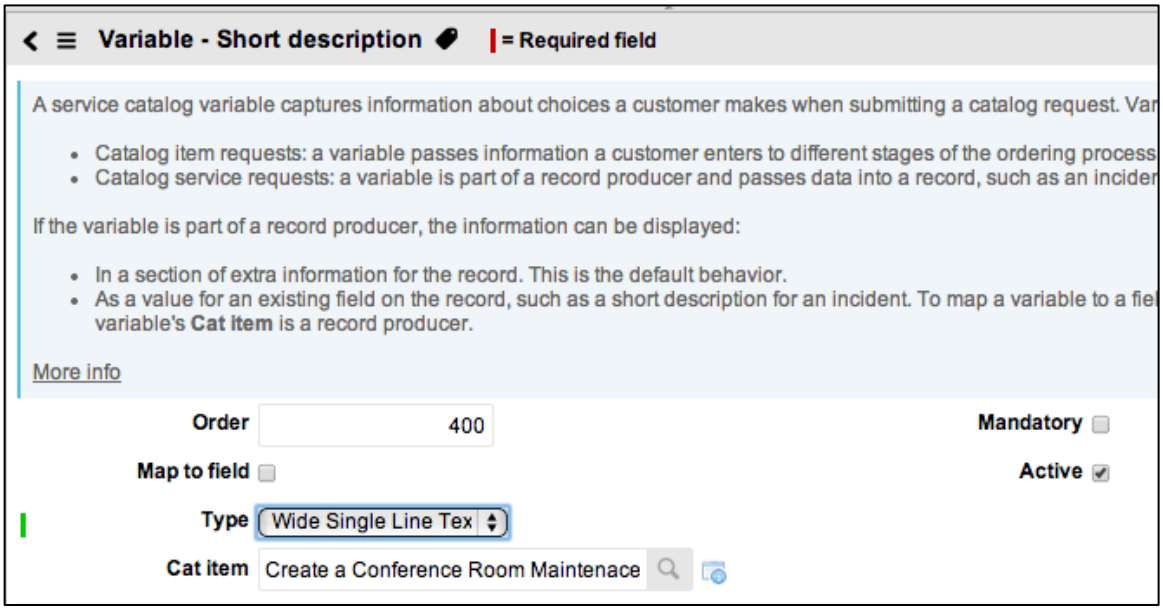
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Change the Variable Type of Short description

1. Right-mouse click the **Short description** variable and select **Personalize Variables.**



2. Change the Type to: **Wide Single Line Text**

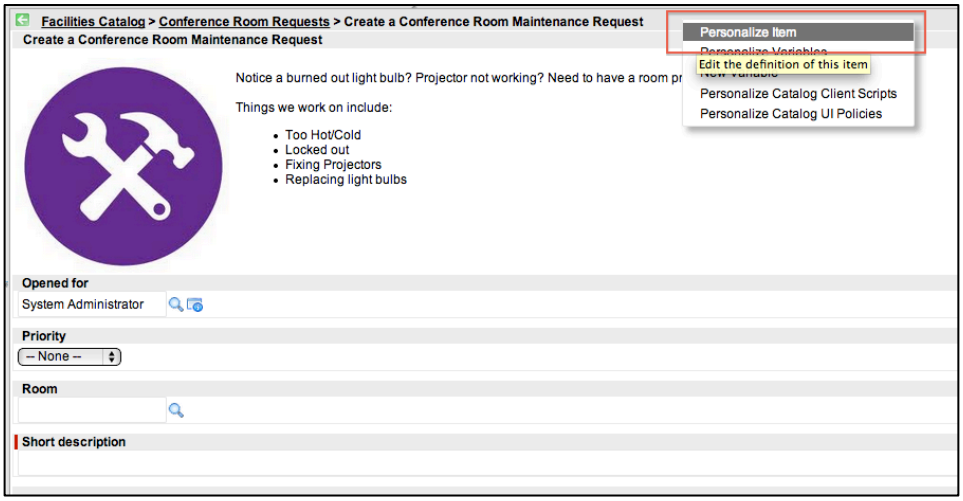


3. Click **Update**.

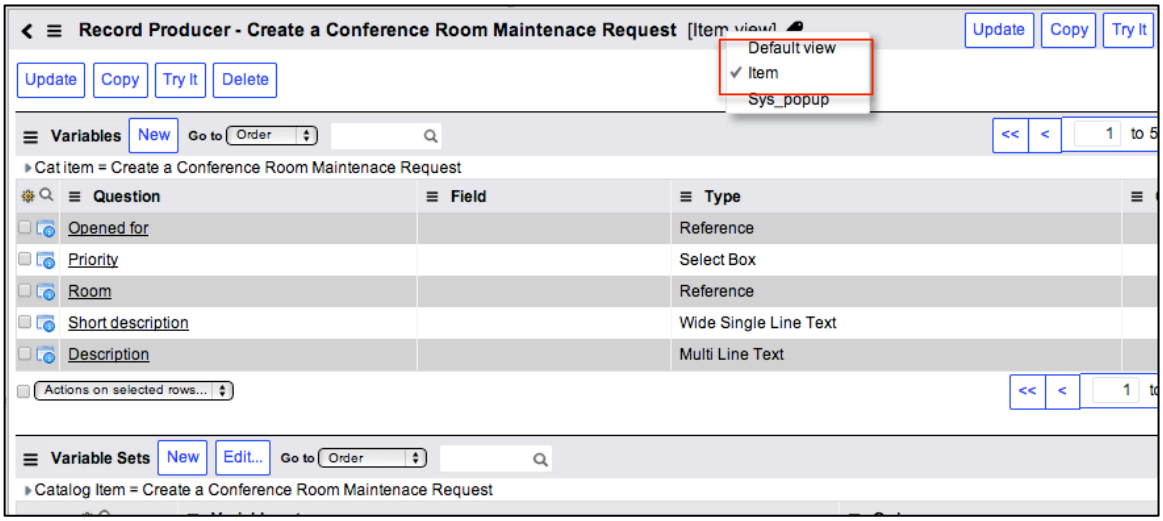
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Pass in a Catalog Variable

1. Right-mouse click the record producer header and select **Personalize Item**.



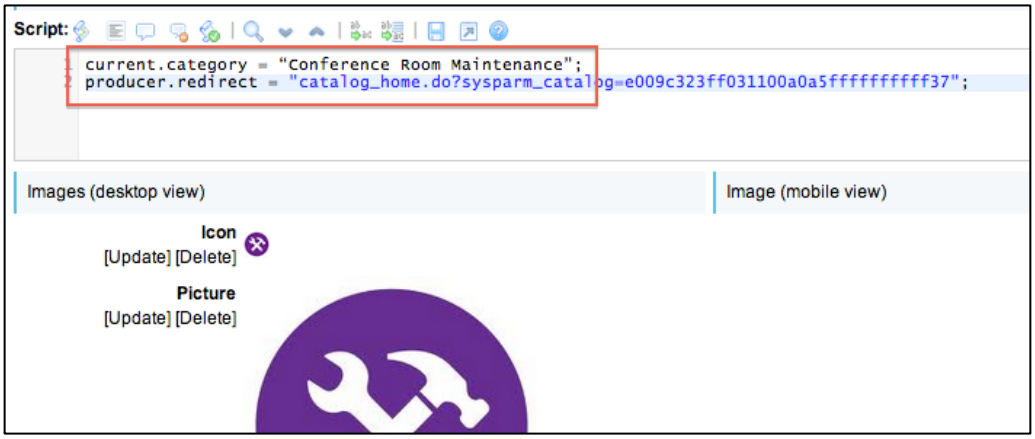
2. Change the view from **Item** to **Default**, as shown.



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3. Scroll to the **Script** section and add the following before the existing line of script:

```
current.category = "Conference Room Maintenance";
```

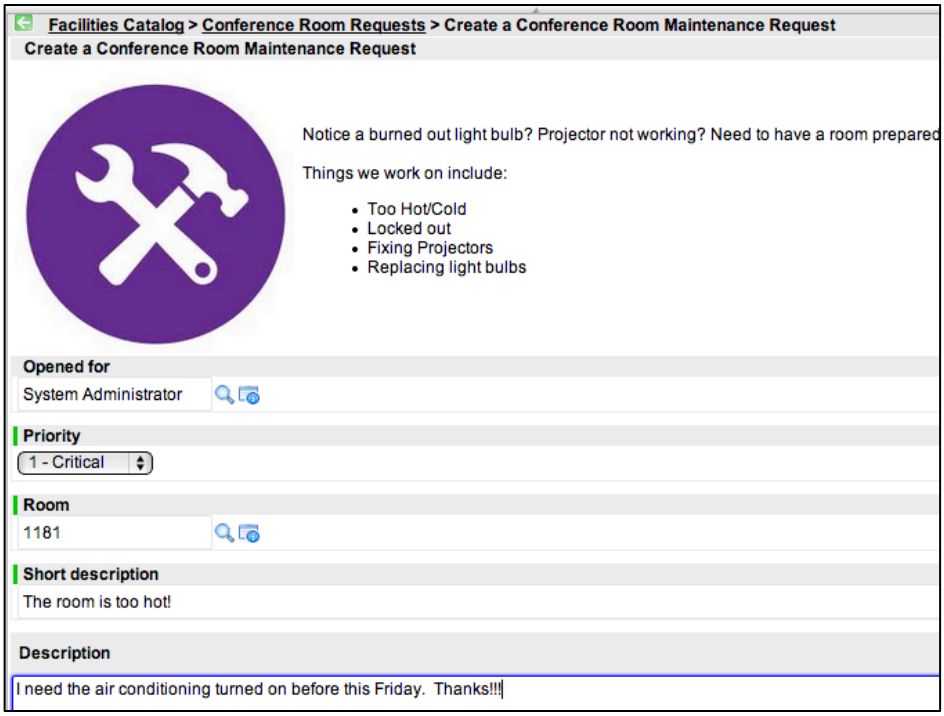


4. Click **Update**.

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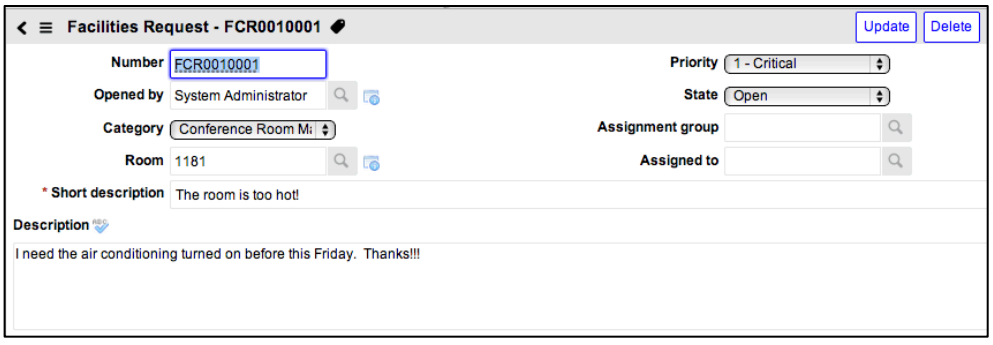
Lab Verification

1. Fill out Priority, Room, Short description, and Description then click **Submit**.



2. Navigate to **Self-Service > Facilities Requests**.

   Select the request you just submitted from the list. (Tip: You might want to click on the Number header to sort by highest to lowest.) Your screen should look like this.



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Lab Goal

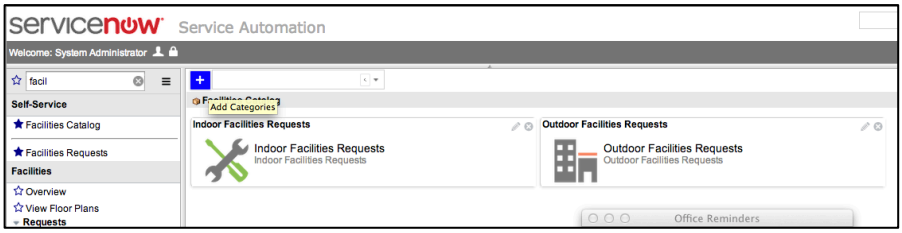
This lab explains how to add a Category to the Service Catalog.

Lab 4
Add a Category to the Service Catalog

Add Category to the Service Catalog

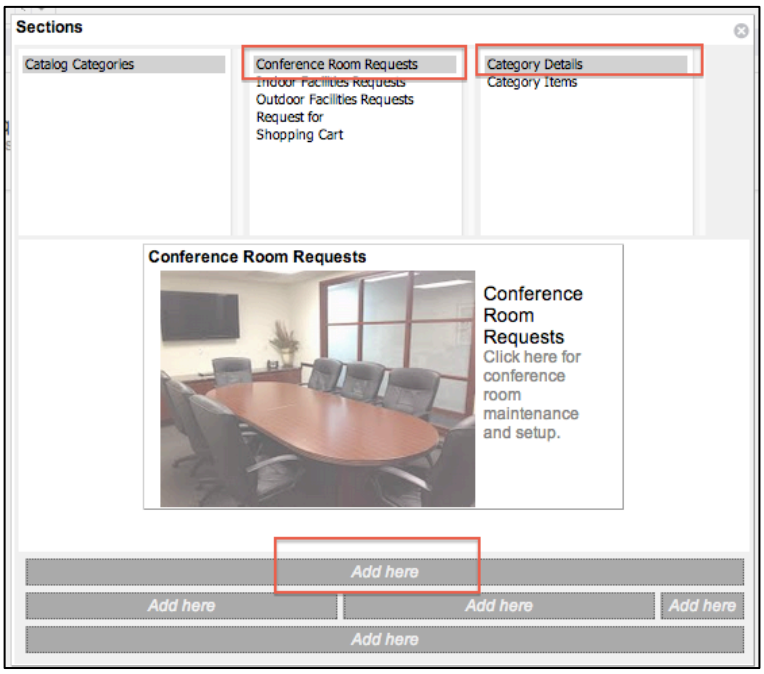
1. Navigate to **Self-Service > Facilities Catalog**.

2. Click the "**+**" symbol in the upper-left corner.



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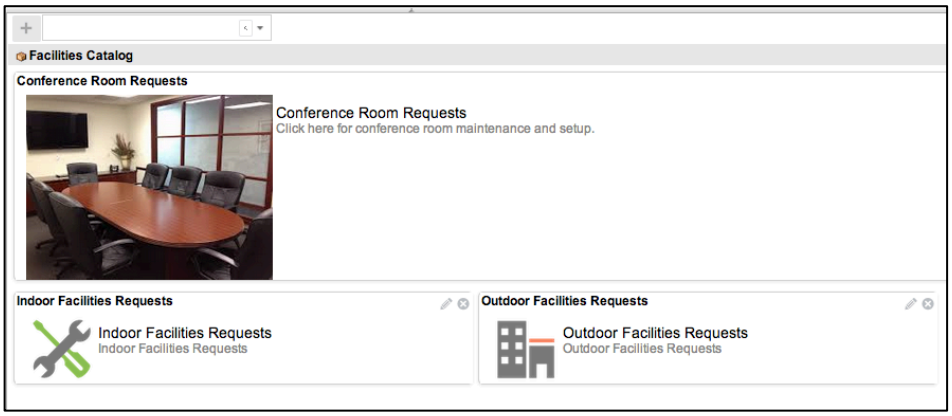
3. Select **Conference Room Requests** and **Category Details**.



4. Click **Add here** to select a Drop Zone.

Lab Success Verification

1. Your screen should look similar to this:



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Lab Goal

This lab explains how to create a Catalog Item.

Lab 5
Create a Catalog Item

Create a Catalog Item

1. Navigate to **Service Catalog > Maintain Items**

2. Click the **New**.

3. Configure the Item as shown.

   Name: **Request Conference Room Setup**

   Catalogs: **Facilities Catalog**

   Category: **Conference Room Requests**

   Short Description: **Request Conference Setup for a Meeting**

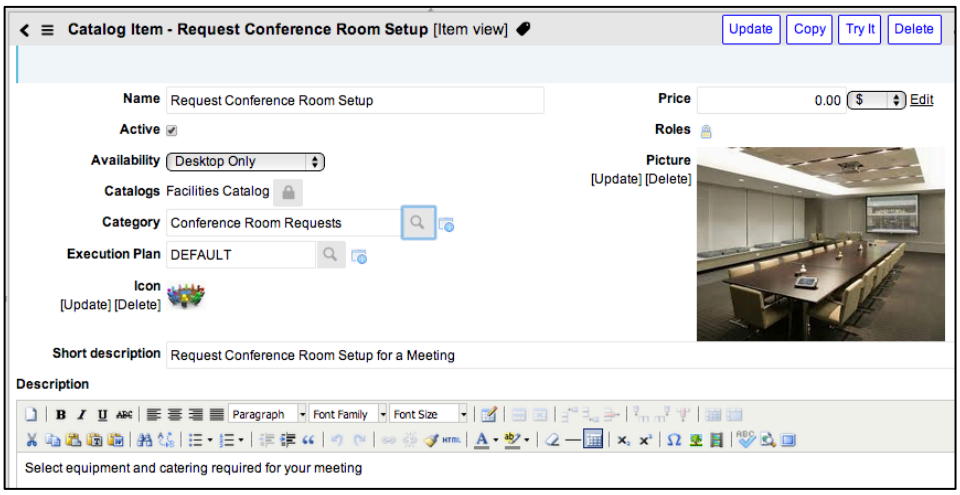
   Description: **Select equipment and catering required for your meeting**

   Icon: Click to add… **Catalog Item Icon.jpg** (downloaded earlier)

   Picture: Click to add… **Catalog Item Picture.jpg** (downloaded earlier)

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4. Right-mouse click the **Header** and click **Save**.



5. Scroll down the form to the **Variables** section of your item and click **New**.

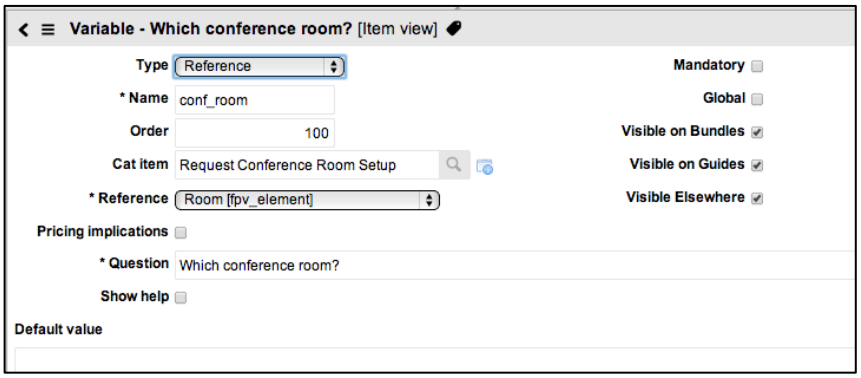
Type: **Reference**

Name: **conf_room**

Order: **100**

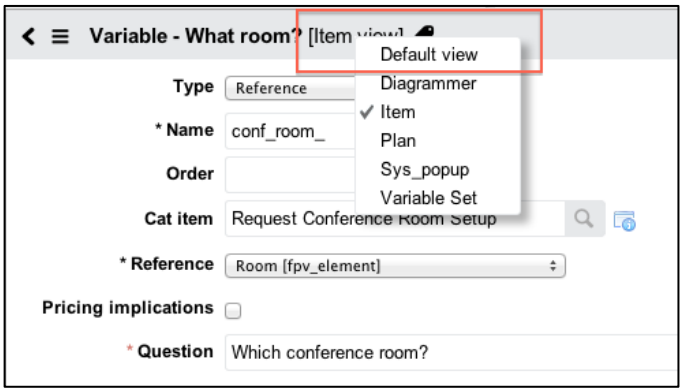
Reference: **Room [fpv_element]**

Question: **Which conference room?**



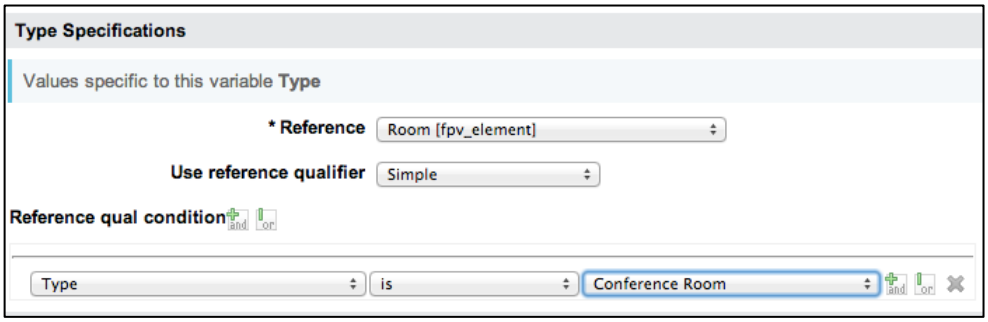
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6. Potential Interim Step. If your view is the "Item" view, then right-mouse click and select **Save**. Then change your view to **Default** as shown before proceeding to the next step.



7. Scroll down to the Type Specifications section

   User Reference Qualifier: **Simple**
   Reference Qual Condition: **Type is Conference Room** (as shown below)



8. Click **Submit**.

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9. Navigate to the **Variables** section of your item and click **New**.

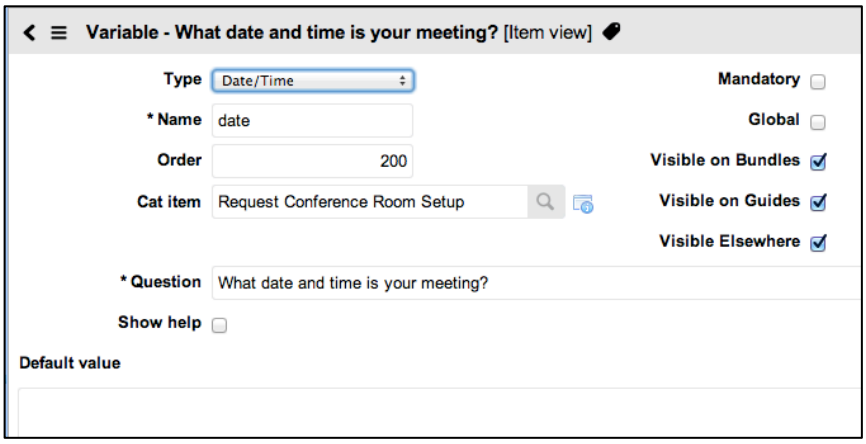
   Type: **Date/Time**

   Name: **date**

   Order: **200**

   Question: **What date and time is your meeting?**

10. Click **Submit**.



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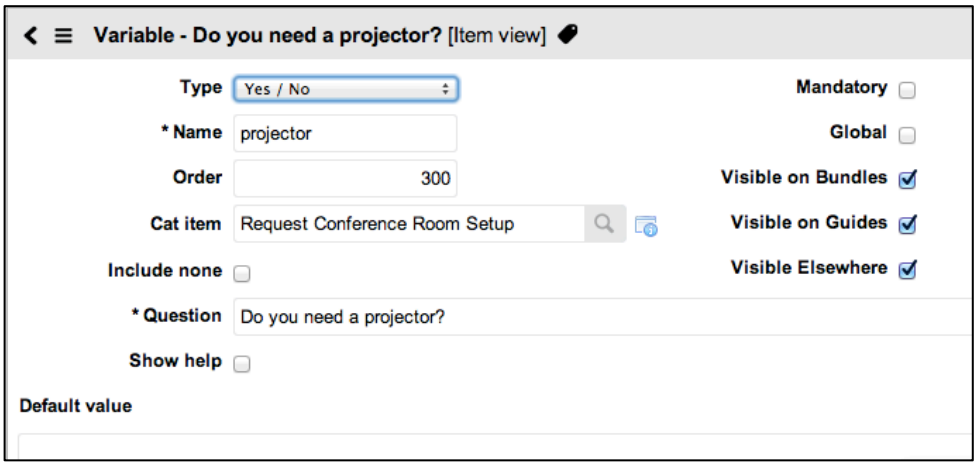
11. Navigate to the **Variables** section of your item and click **New**.

    Type: **Yes/No**

    Name: **projector**

    Order: **300**

    Question: **Do you need a projector?**



12. Click **Submit**.

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13. Navigate to the **Variables** section of your item and click **New**.

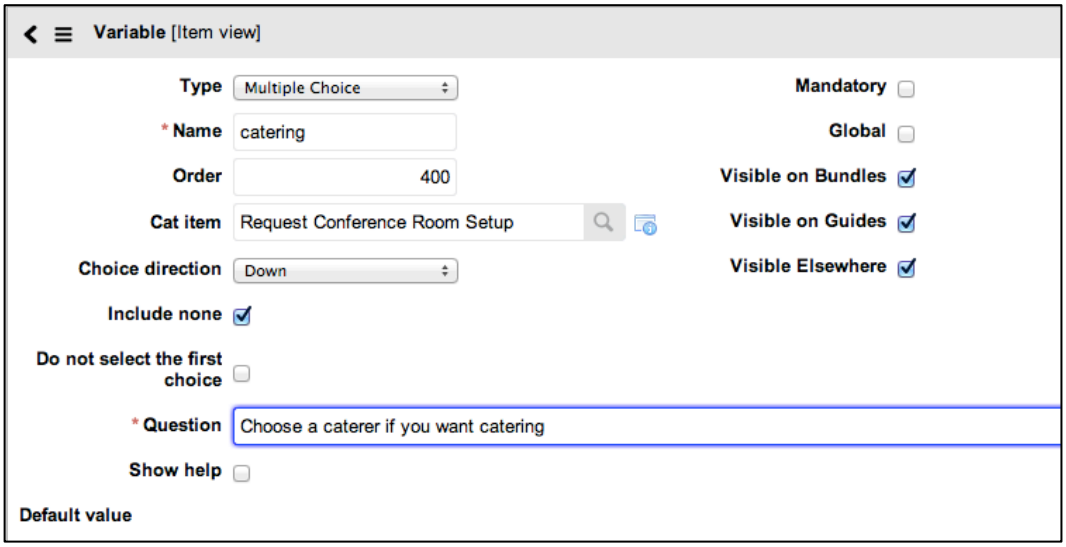
Type: **Multiple Choice**

Name: **catering**

Order: **400**

Include none: **check**

Question: **Choose a caterer if you want catering?**



14. Right-mouse click the **Header** and click **Save**.

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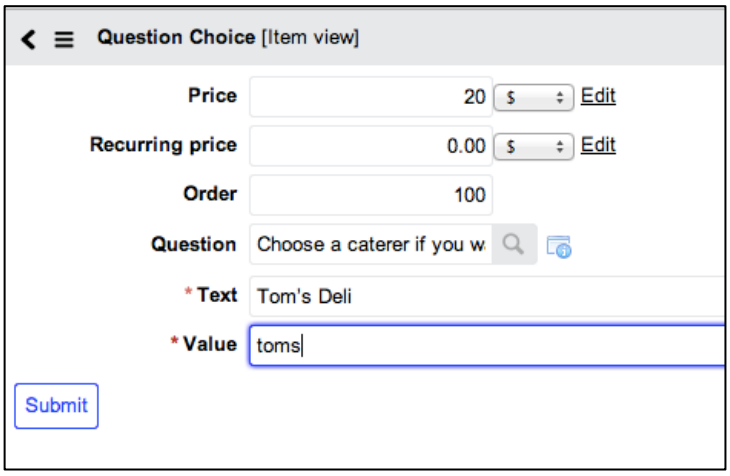
15. Scroll down your variable to **Question Choices** at the bottom and click **New**.

    Price: **20**

    Order: **100**

    Text: **Tom's Deli**

    Value: **toms**



16. Click **Submit**.

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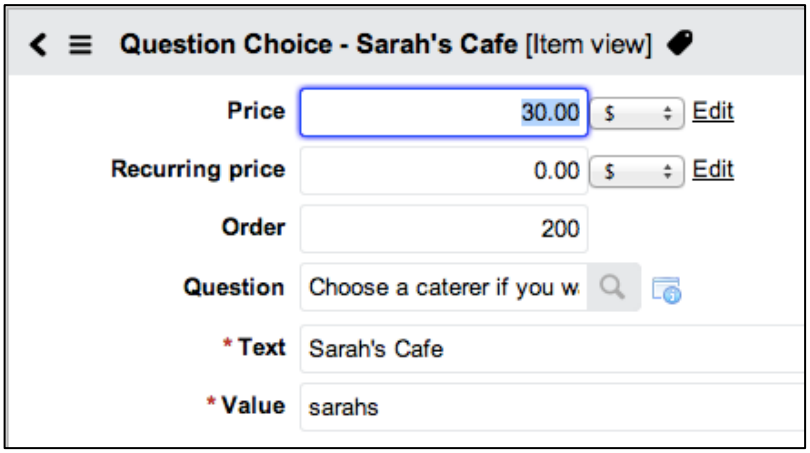
17. Scroll down your variable to **Question Choices** at the bottom and click **New**.

    Price: **30**

    Order: **200**

    Text: **Sarah's Cafe**

    Value: **sarahs**



18. Click **Submit**.

19. Click **Update** from the variable record to navigate back to your item.

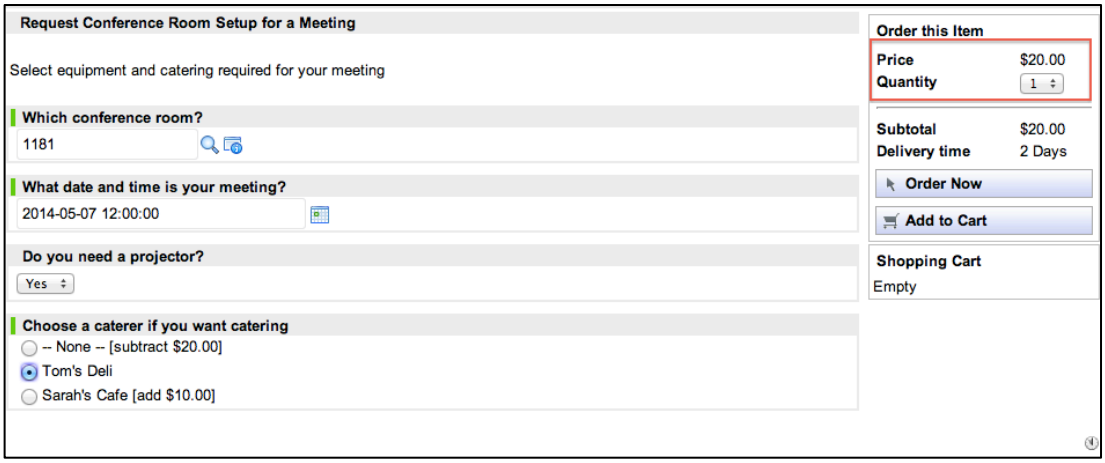
20. Click **Try It**.

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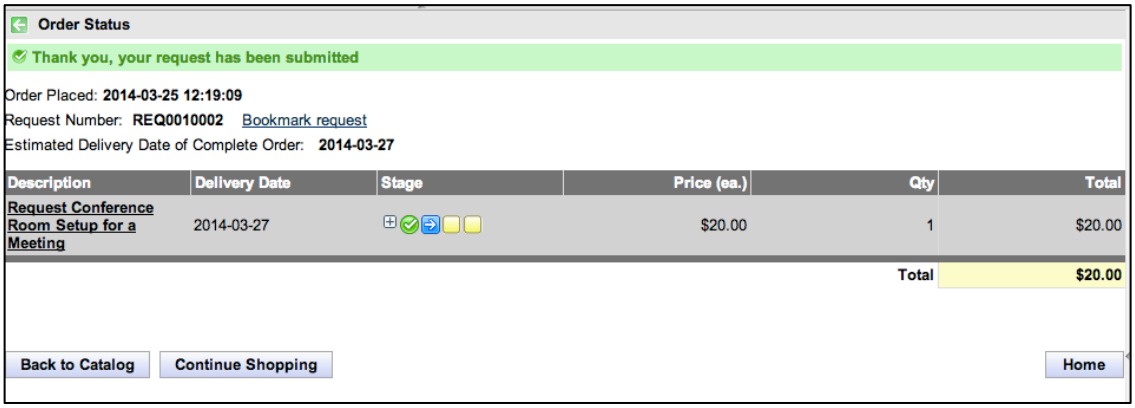
Lab Success Verification

1. Fill out your Catalog Item and select Tom's Deli for catering.

2. Your screen should look like this. Notice the price associated with your cart.



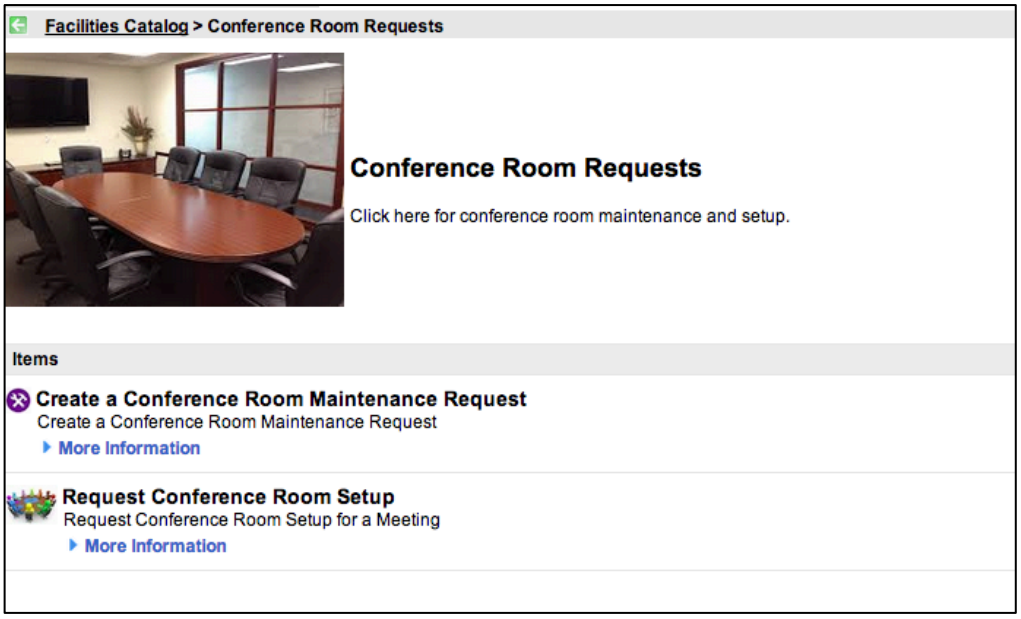
3. Click **Order Now**. The resulting screen should look like the one below.



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4. Navigate to **Self-Service > Facilities Catalog > Conference Room Requests.**

5. Your screen should look like this. You may need to collapse the record producer and catalog items by clicking on the **triangle** next to **More Information**.



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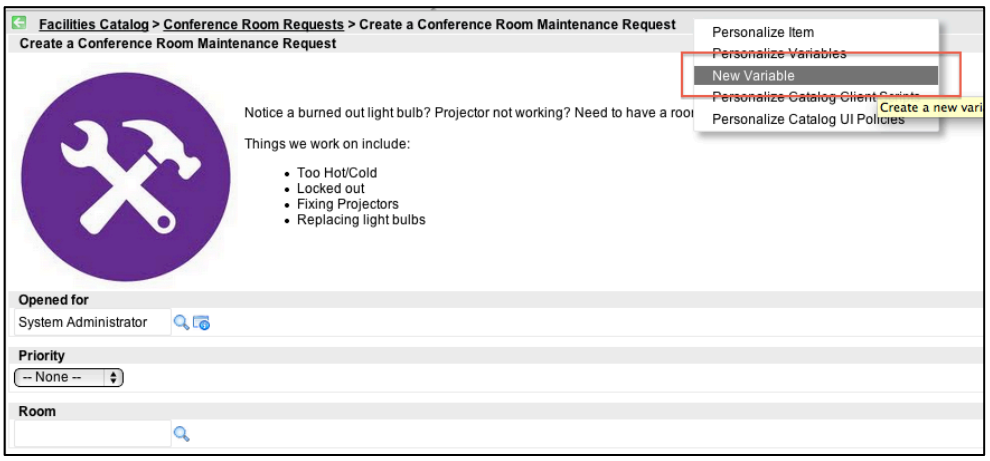
Lab Goal

This lab explains how to create a UI Policy, create a UI Policy Action, and an Advanced Reference Qualifier.

Bonus Lab
Create a UI Policy

Add a New Variable

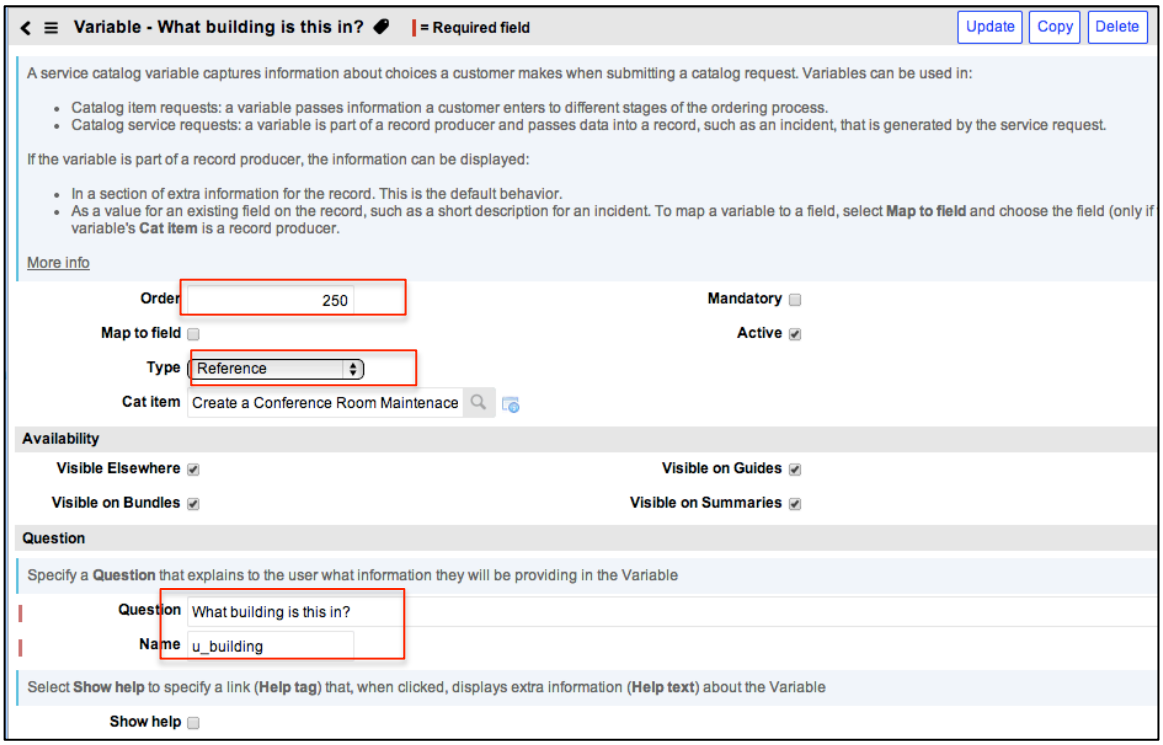
1. Navigate to **Self-Service > Facilities Catalog**
2. Click the **Conference Room Request** category.
3. Click the **Create a Conference Room Maintenance Request** link.
4. Right-mouse click the **form header** and select **New Variable**.



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5. Configure the new variable as shown:

   Order: **250**
   Type: **Reference**
   Questions = **"What building is this in?"**
   Name = **u_building**

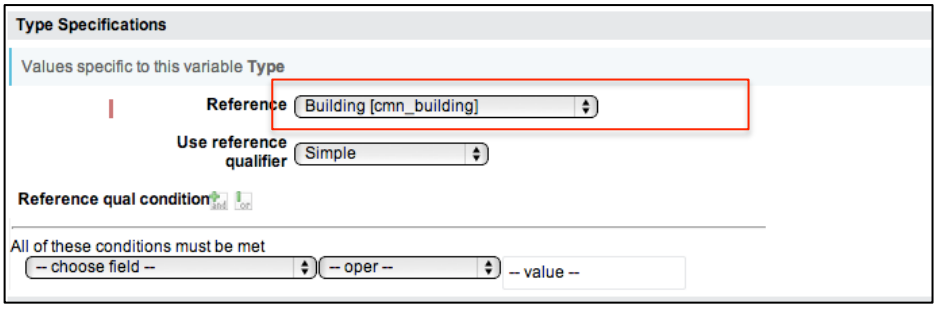


Note: When you give the variable the same name as the field on the resulting form, it will pass its value automatically. **u_building** is the name of a custom field on the Facilities Request form.

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6. To continue configuring the variable, scroll down and set:

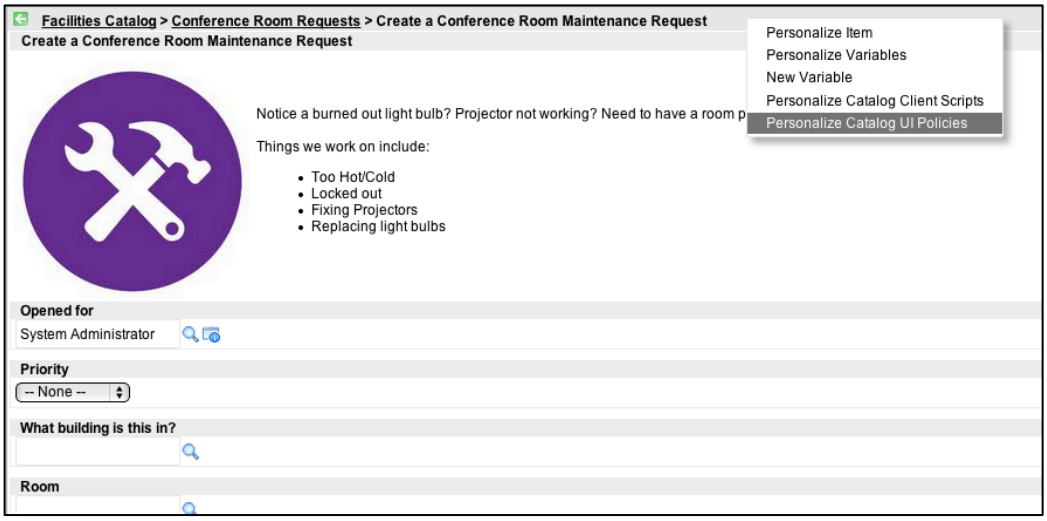
   Reference: **Building [cmn_building]**



7. Click **Submit**.

Create a UI Policy

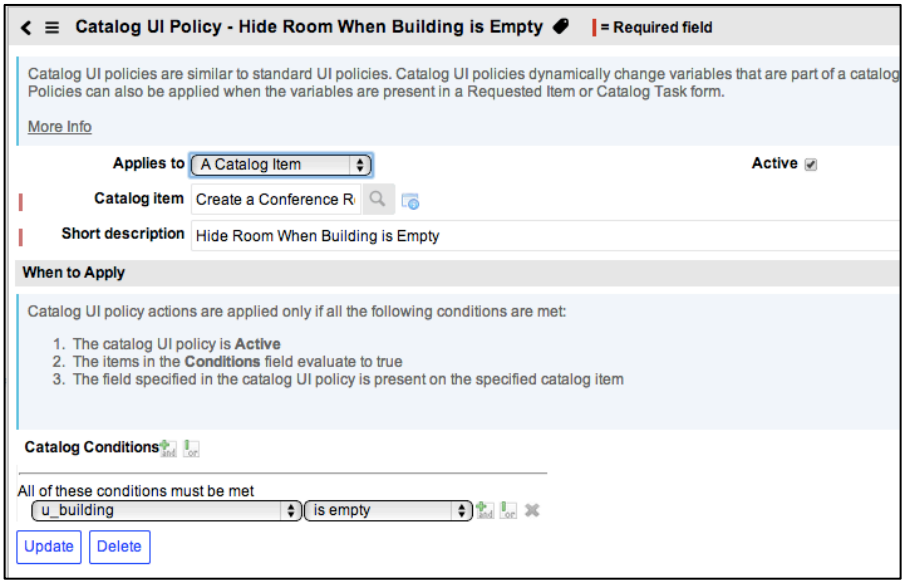
1. Right-mouse click on the form header and select **Personalize Catalog UI Policies**.



2. Click **New**.

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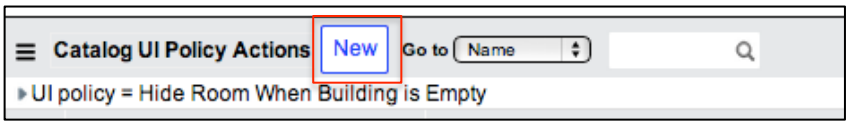
3. Configure the **UI Policy** as shown.



4. Right-mouse click on the form header and select Save.

Create a UI Policy Action

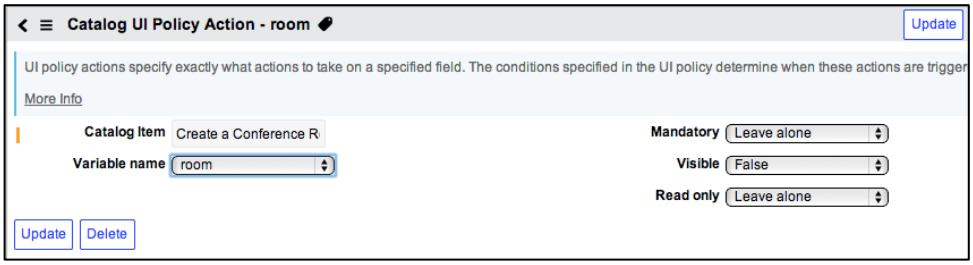
1. Click **New** in the related list below.



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2. Configure the **UI Policy Action** as shown:

   Variable name: **room**
   Mandatory: **Leave alone**
   Visible: **False**
   Read only: **Leave alone**

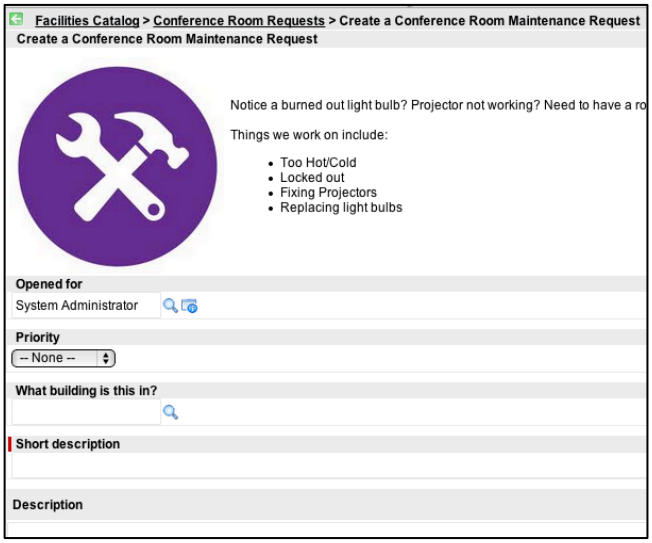


3. Click **Submit**.

4. Navigate to **Self-Service > Facilities Catalog**

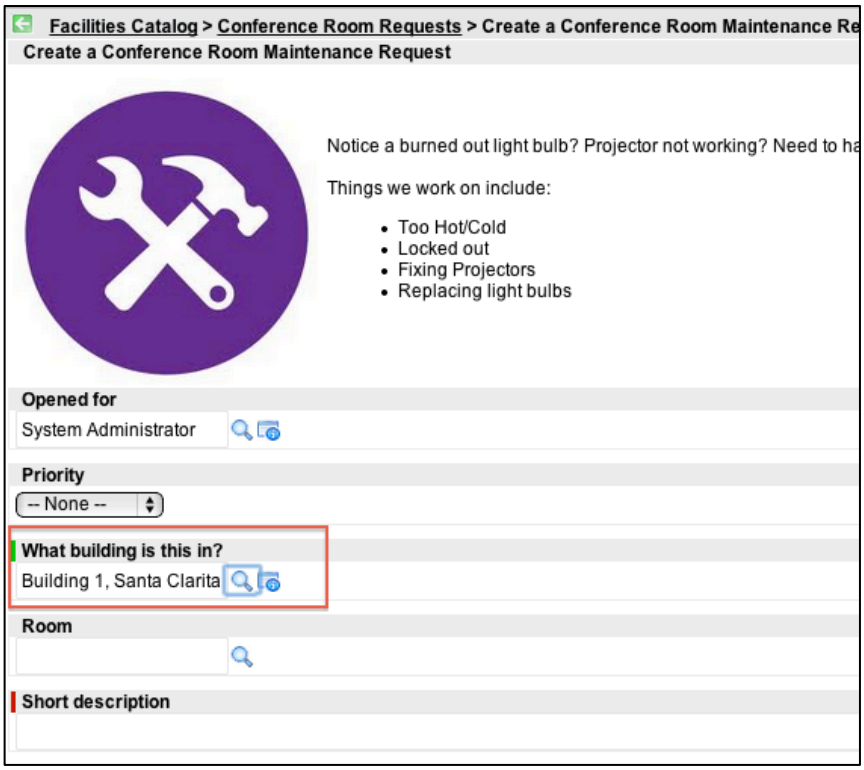
5. Click your category **Conference Room Requests**.

6. Click the **Create a Conference Room Maintenance Request** link. The room variable should be hidden.



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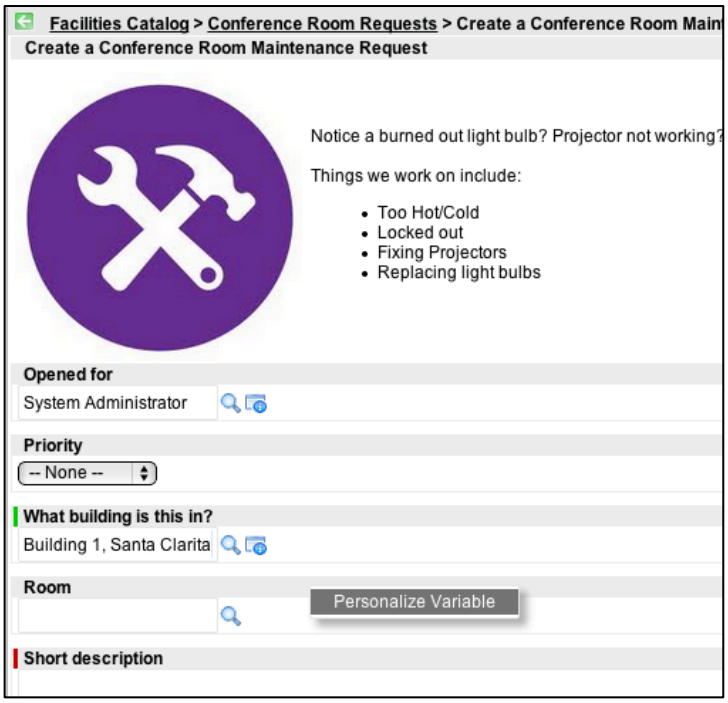
7. Click the magnifier glass icon to the right of **Building**. Select a building. The room variable should become visible.



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Create an Advanced Reference Qualifier

1. Right-mouse click on the **Room** variable. Select **Personalize variable**.

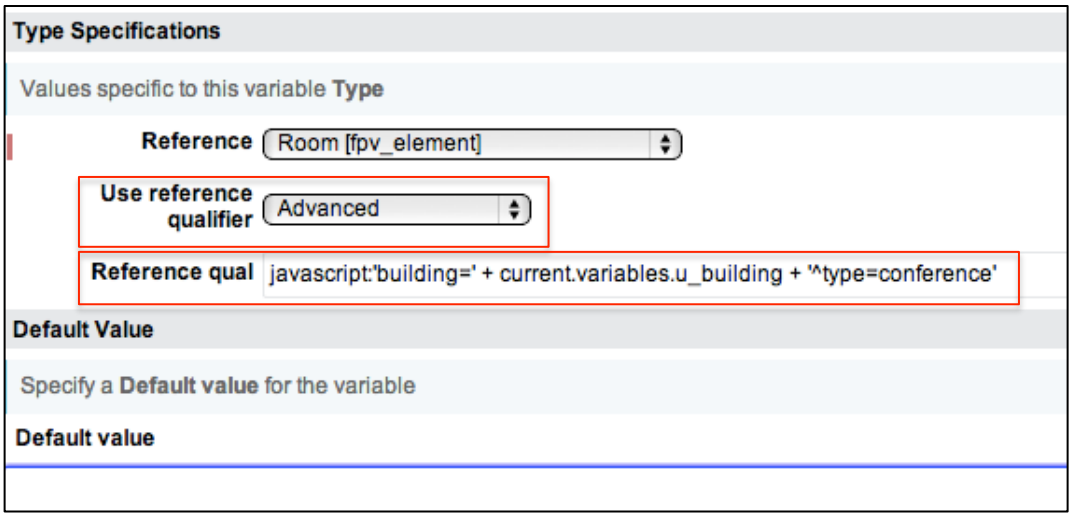


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2. Scroll down to **Type Specifications** section and change the reference qualifier.

   Use reference qualified: **Advanced**

   Reference qual:
   `javascript:'building=' + current.variables.u_building + '^type=conference'`



   Note: This Advanced Reference Qualifier filters the list of available rooms by both the building where the room resides and the type of room that it is.

3. Click **Update**.

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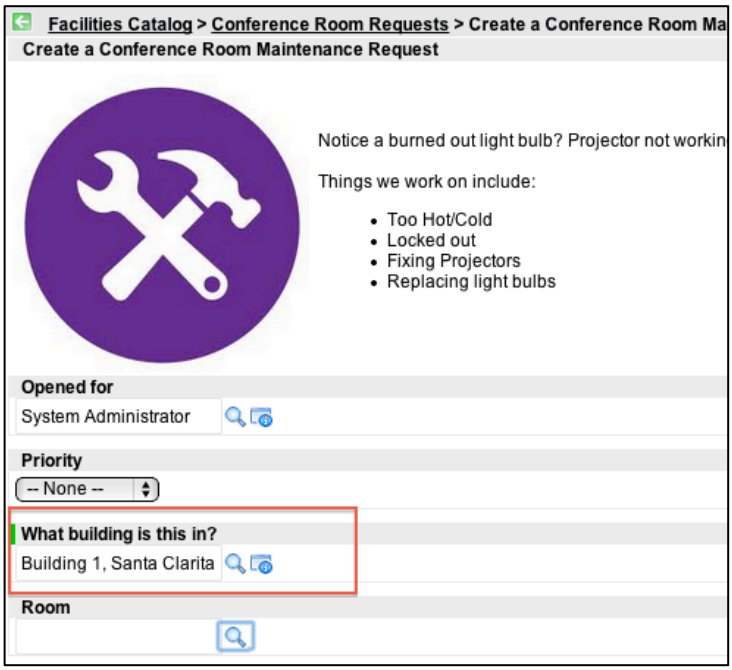
Lab Verification

1. Navigate to **Self-Service > Facilities Catalog.**

2. Click your category **Conference Room Requests**.

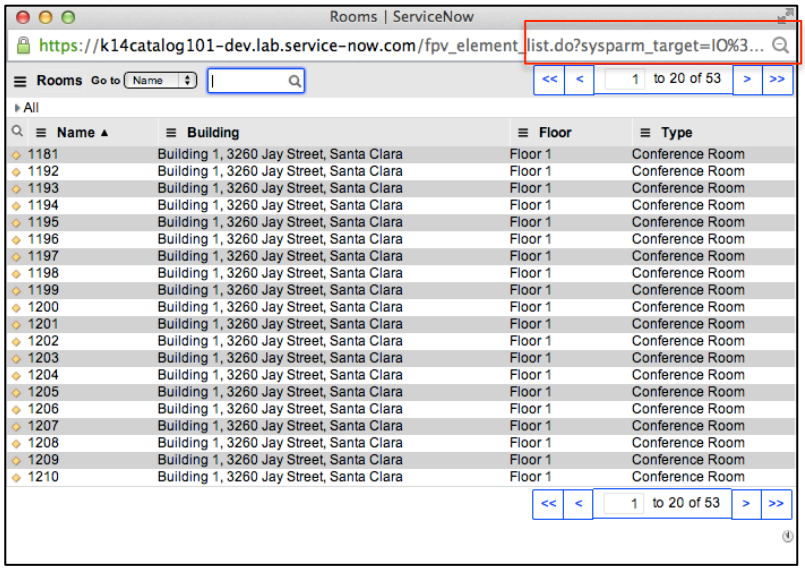
3. Click the **Create a Conference Room Maintenance Request** link.

4. Click the magnifier glass icon to the right of **Building**. Select Building 1.



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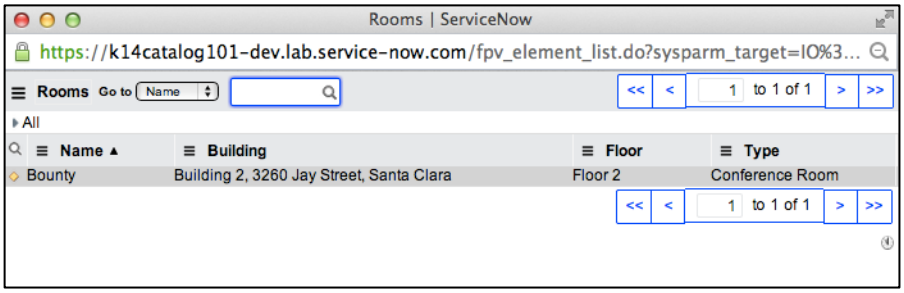
5. Approximately 55 conference rooms are listed. (Results may vary based on fluctuations in the demo data.) These are the only conference rooms in Building 1.



Close the pop-up window.

6. Click the magnifier glass icon to the right of **Building** to select Building 2.

7. Click the magnifier glass next to **room**. Only one conference room is listed. This is the only conference room in Building 2.



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Congratulations! You completed Service Catalog 101.

We invite you to build upon the skills you developed in this lab by participating in the Service Catalog 201 lab at Knowledge 14. For additional information on Service Catalog, you may also visit our wiki site.

https://wiki.servicenow.com/index.php?title=Introduction_to_Service_Catalog

https://wiki.servicenow.com/index.php?title=Service_Catalog_Management

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