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Service Catalog 201: Create a Consumer Experience

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Agenda

Review Catalog Basics

Product Catalog Items

Order Guides

Workflow Stages

Mobile Catalog

Catalog Properties

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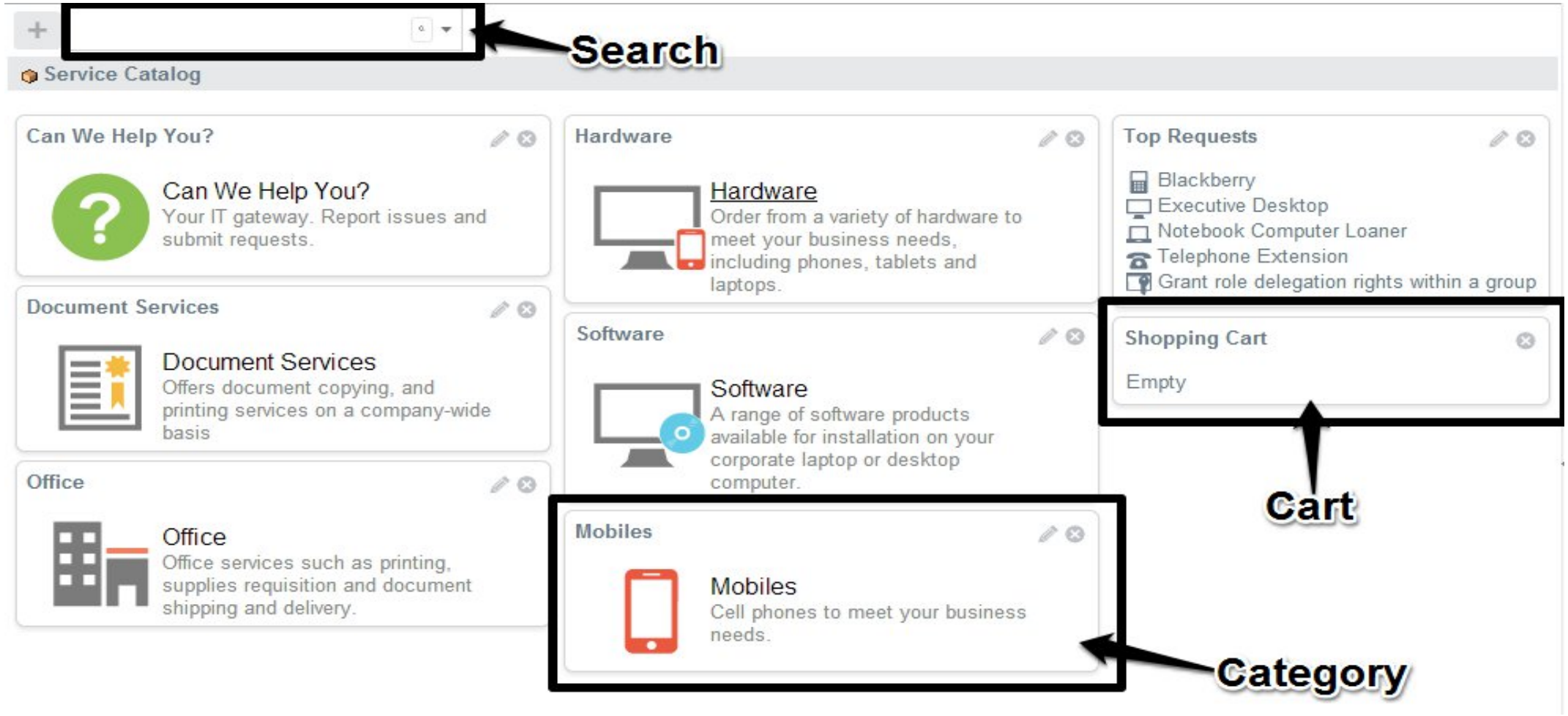
Review the Basics

What is this Catalog stuff?

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Single Catalog Page

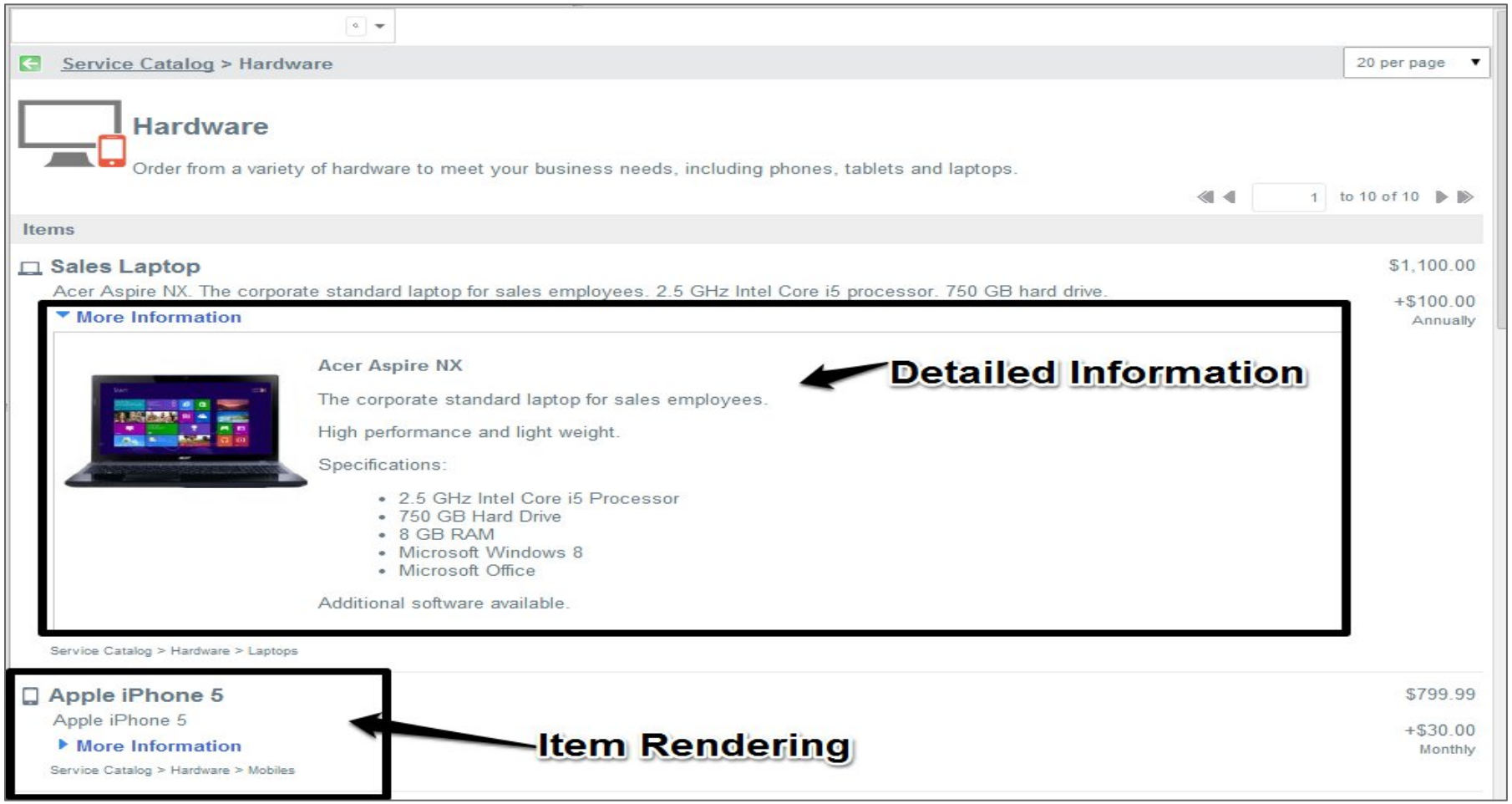
This is what we have been used to



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Catalog Category Page

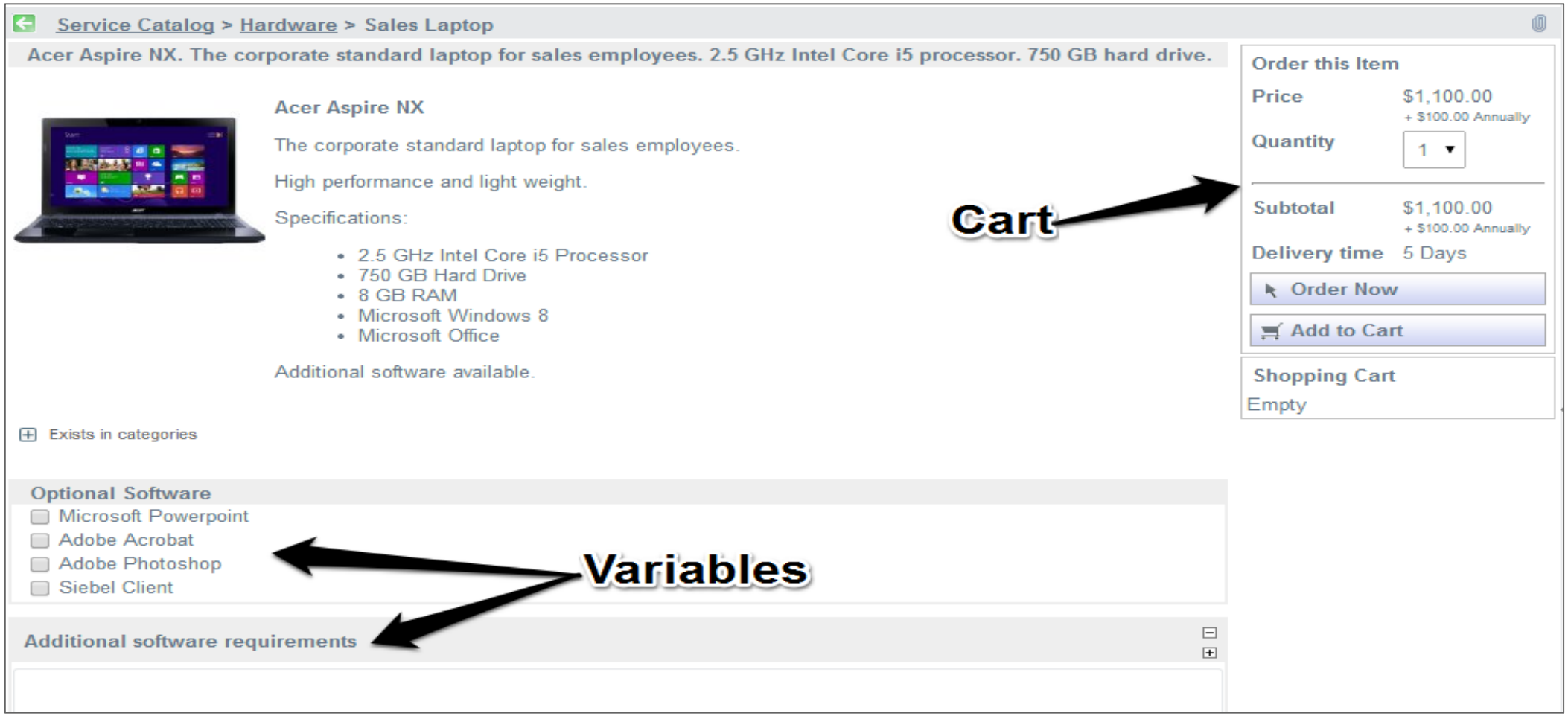
Much better formatting and information



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Catalog Item

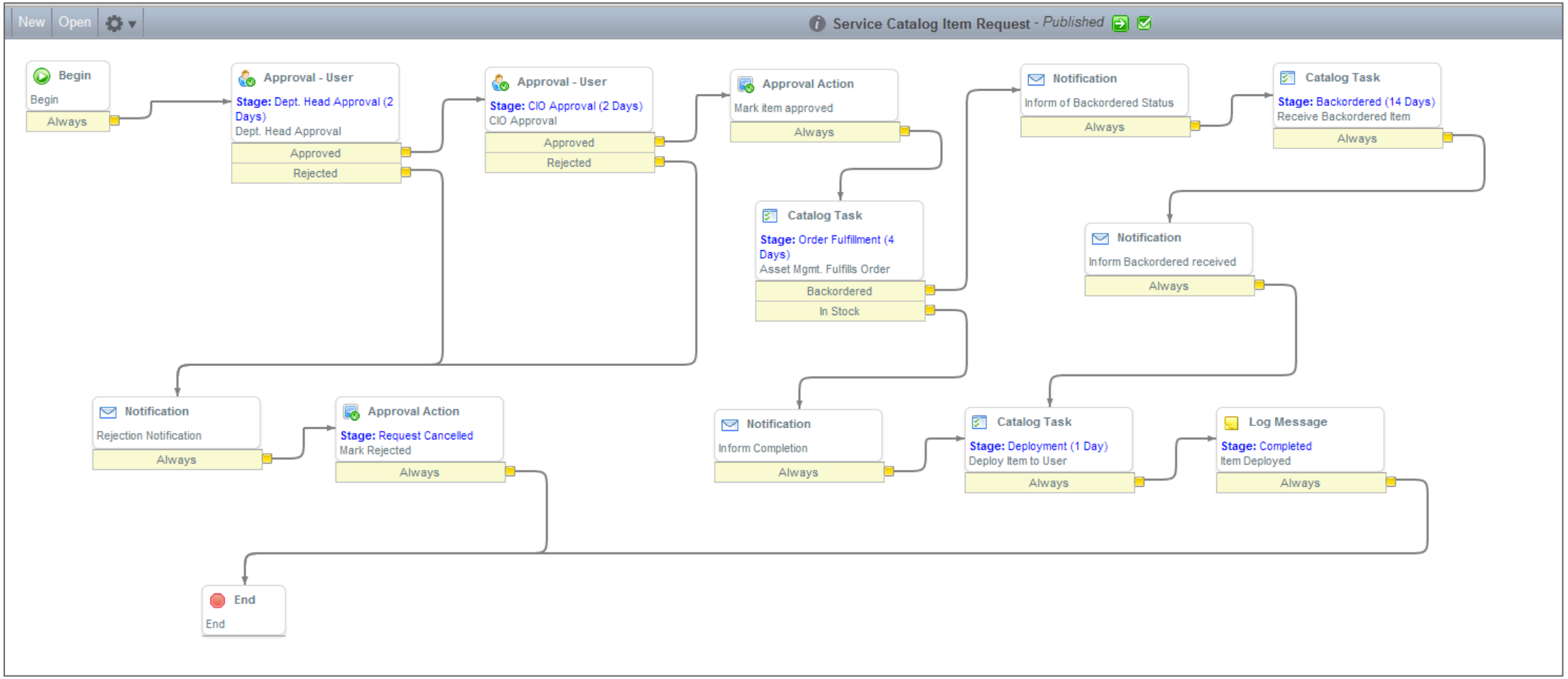
Order what you want



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Workflow

Customized fulfillment process per catalog item



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How the catalog works?

Request, Requested Item(s), Catalog Tasks



Request (REQ00101)

- Approval

Workflow



Requested Item (RITM00102) - Computer

- Approval
- Catalog Task
- Catalog Task

Workflow



Requested Item (RITM00103) - Phone

- Approval
- Catalog Task
- Catalog Task

Workflow



Requested Item (RITM00104) – Business Cards

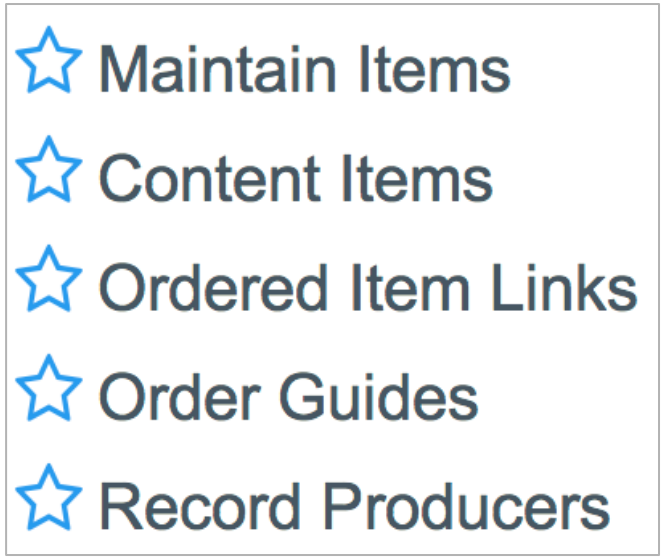
- Approval
- Catalog Task
- Catalog Task

Workflow

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Catalog Basic Building Blocks

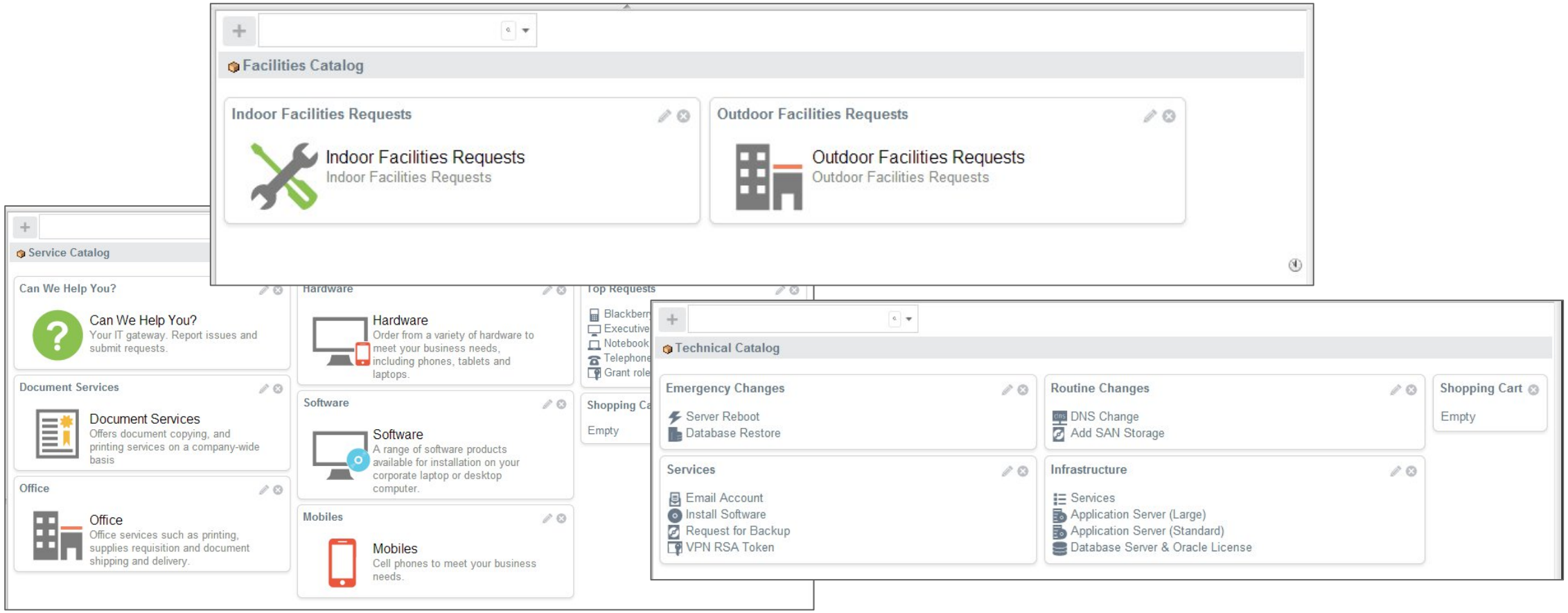
- Catalog Items - catalog 101
  - Goods or Services available to order
- Record Producers - catalog 101
  - Create task-based records from the catalog. Like incident.
- Order Guides
  - Order multiple or Bundled items in a single request
- Content Items
  - Provides information. May be static information, or links to knowledge articles, or external web-based content.



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What if I want more that 1 Service Catalog?

Service, Facilities, Technical catalogs?



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The Facilities Catalog

The Facilities Department likes what the IT Department has done with their Service Catalog, but wants a separate catalog from the Service and Technical catalogs. This lab explains how to create a Facility Catalog.

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Product Catalog

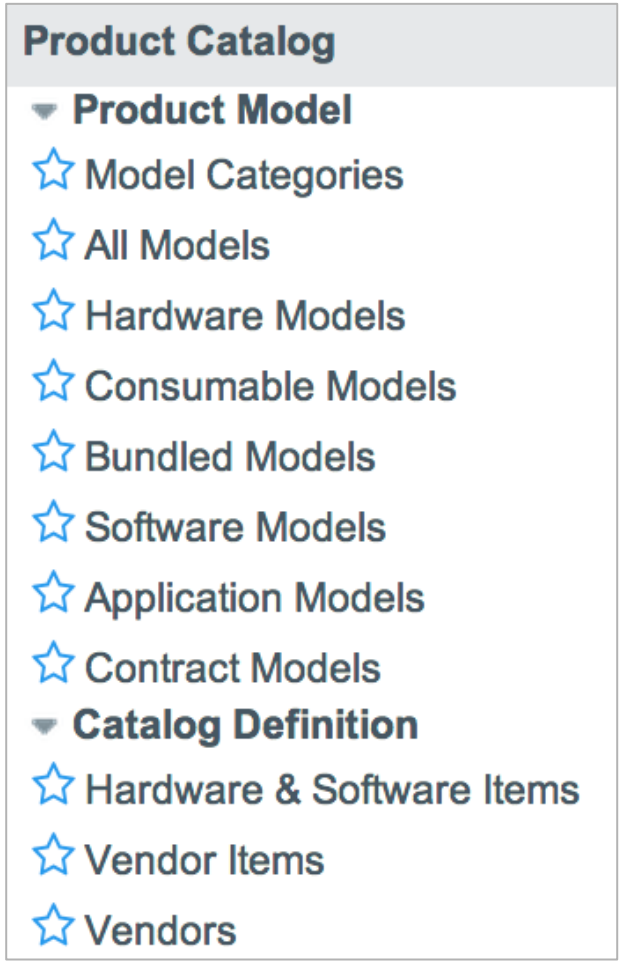
Wow how many catalogs do we have?

Asset Management anyone?

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Product Catalog – What is it and what does it do for me?

- Contains all asset models
  - Hardware, software, etc.
- Models can be published within the product catalog
- Published Models are automatically linked and available in the Service Catalog as catalog items.



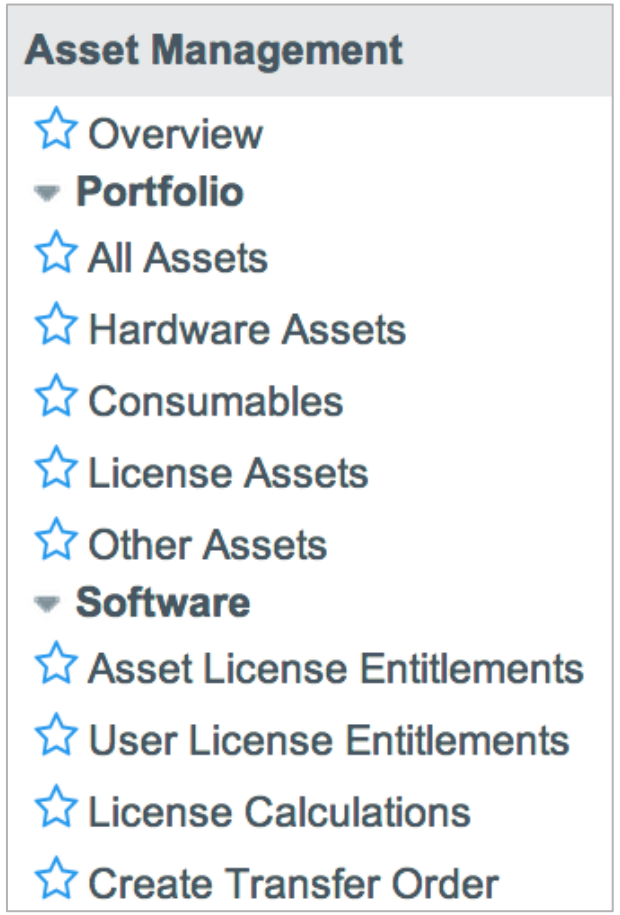
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Asset Management & Models

Slight deviation….. Very simplified

- Assets – What are they?
  - Any company-owned hardware, system, information used in business activities that oftentimes exceeds a financial value.
  - In ServiceNow, all assets are associated with a model.

- Asset Models – What are they?
  - Specific versions or various configurations of an asset.
  - Model definitions are often based on vendor-provided criteria. Such as manufacturer, hardware specs, or type.



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For Example

- You have many Dell PowerEdge server assets which are associated with the Dell R240 hardware model definition in your product catalog.
- You want to allow people to order a new server from the service catalog.
- So you publish this model definition into the Service Catalog
- You now have process linkage capabilities from a request, to procurement, fulfillment, and asset management



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Product Catalog Item

Facilities wants to list some of their hardware, tracked in the product catalog, as Catalog Items that people can order. This lab explains how to link and create Catalog Items for hardware models in the service catalog

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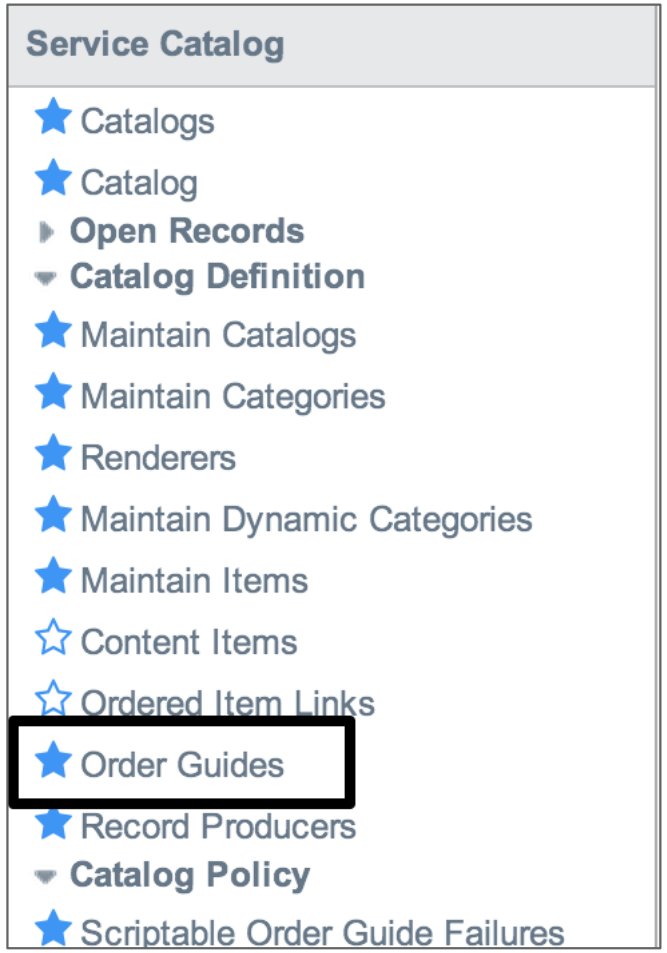
Order Guides

Let's Bundle Items Together!

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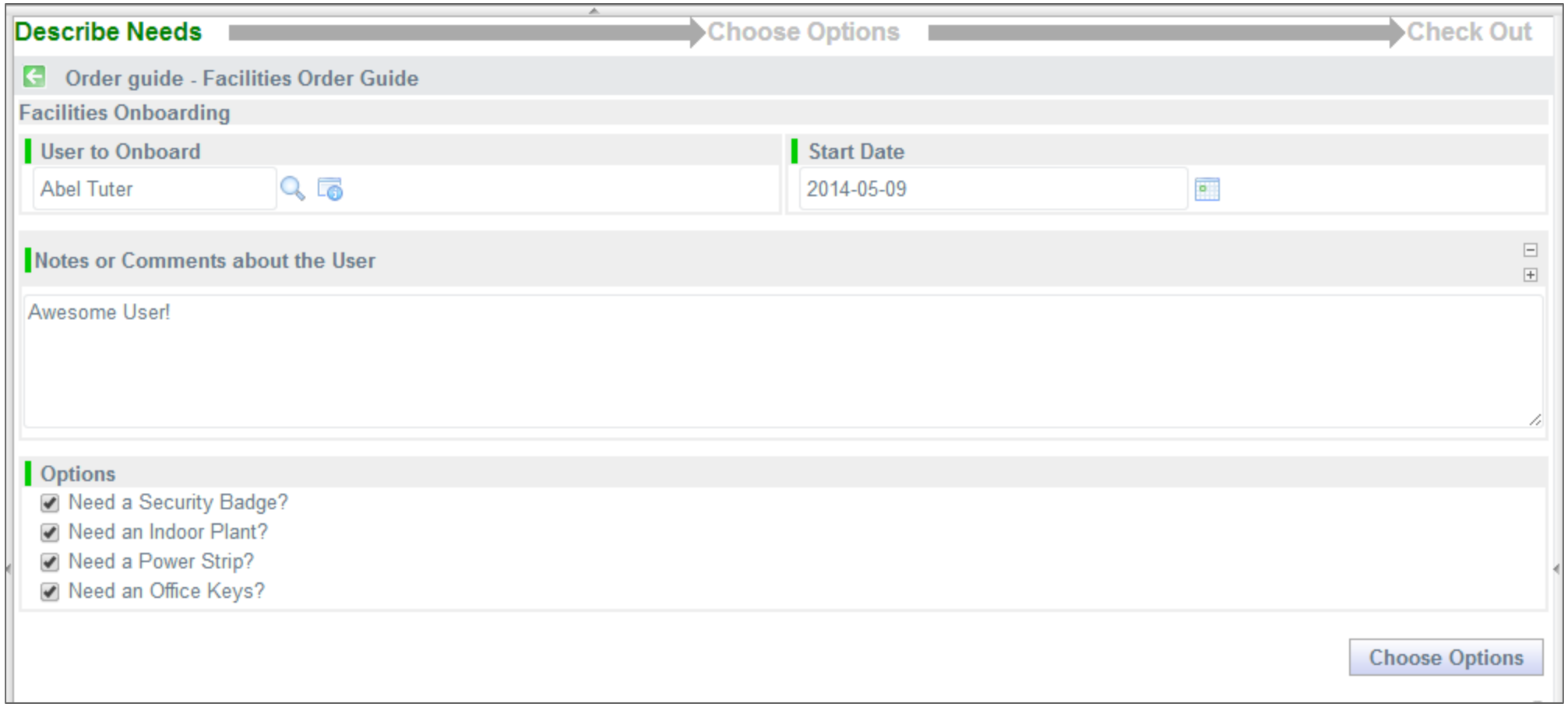
Order Guide - Overview

- An order guide gives users an easy way to dynamically order multiple catalog items as a single request.
- Provides a single entry page to bundled items.
- Based upon what a user selects, certain catalog items will be presented.
- 3 step process



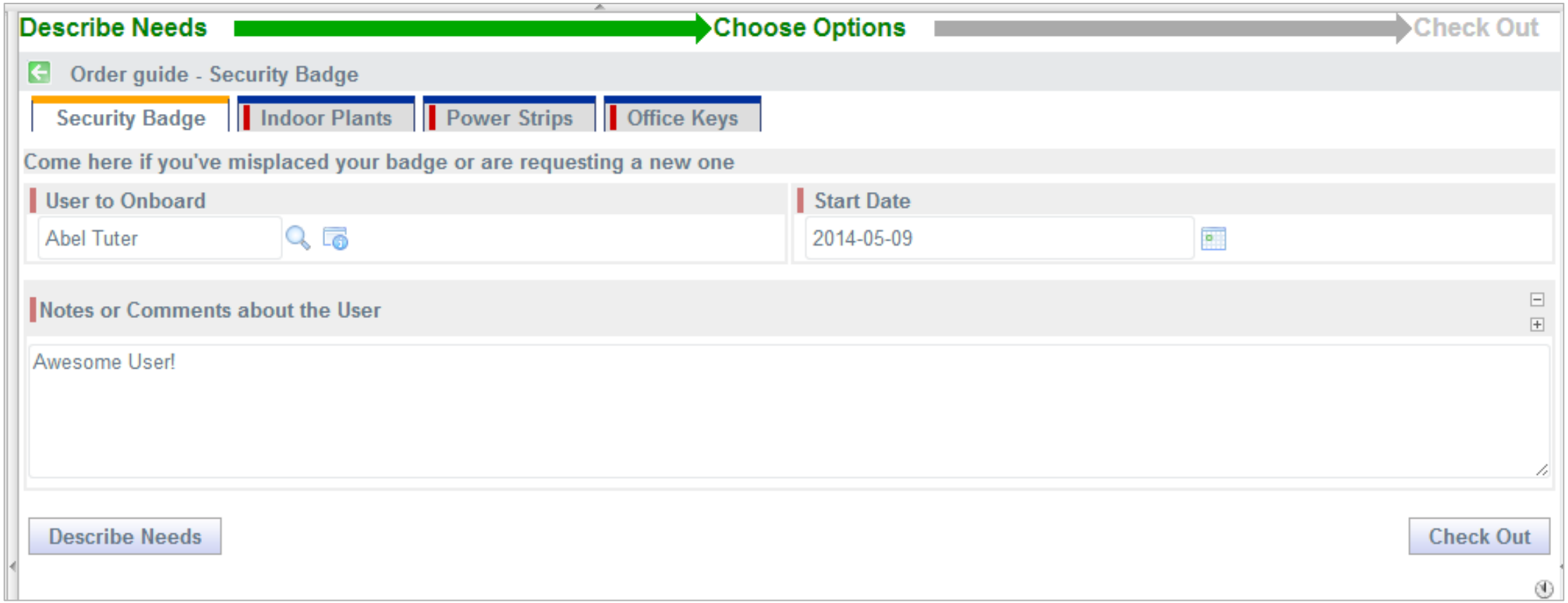
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Order Guide: Describe Needs



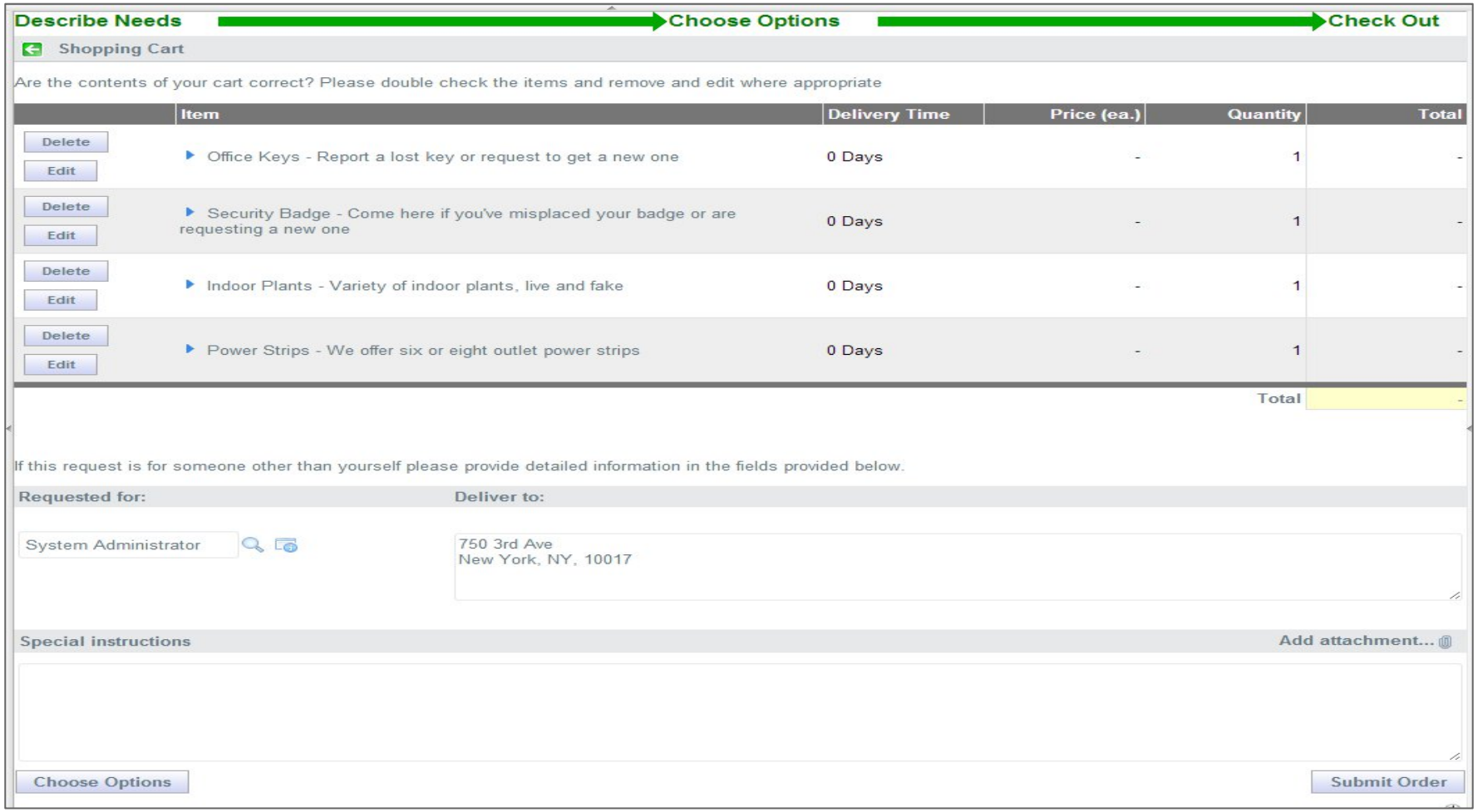
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Order Guide: Choose Options



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Checkout



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Create an Order Guide

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.

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Lab: Try Out Your Order Guide

- Navigate to **Self-Service → Facilities Catalog → Furniture and décor**
- Click on the **Facilities Order Guide**, fill out the order guide and choose options
- Data from the order guide should have cascaded down to the catalog items
- Fill out the catalog items and submit

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Workflow Stages

Tell your users what you are going to do….

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Catalog/Request Item Workflows

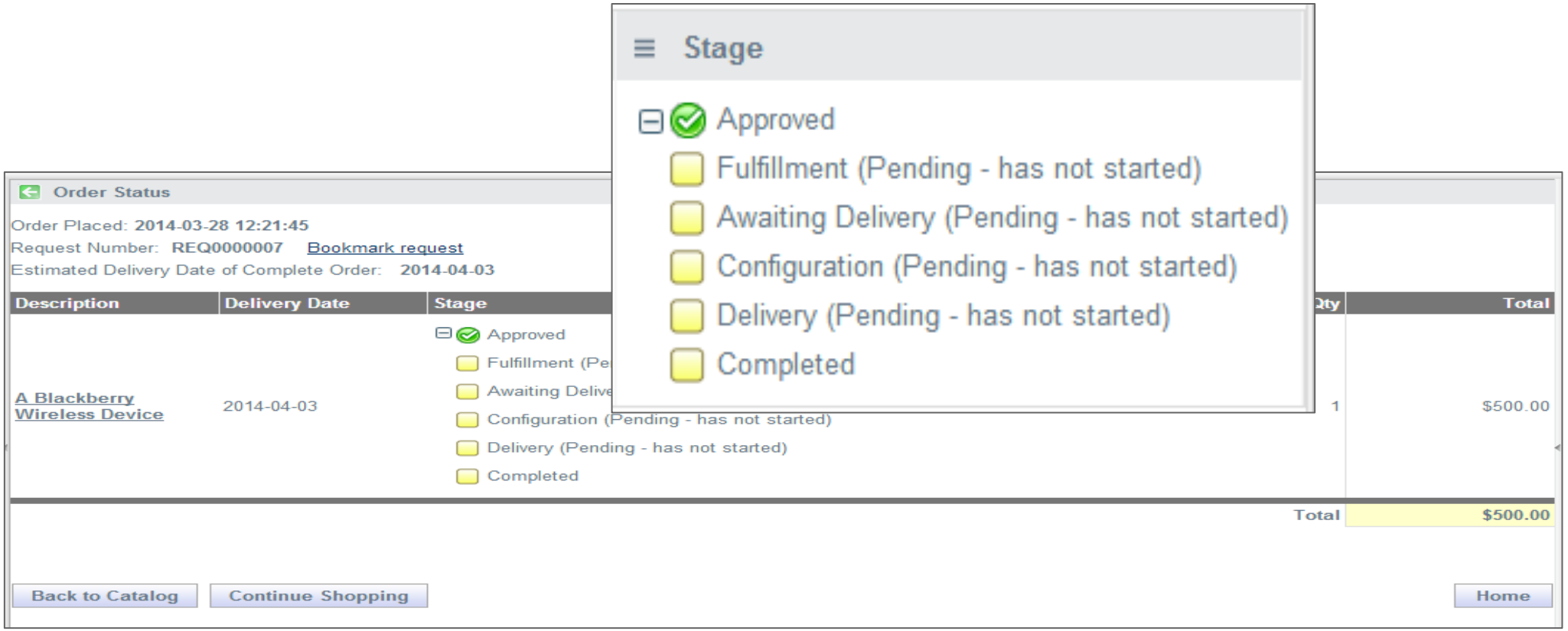
Review

- An independent automated fulfillment process per catalog item.
- Can contain approvals, tasks, scripts and other activities.
- Can utilize workflow stages to visually communicate the process.
- Are specified on the selected catalog item workflow, but run against the requested item.

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Workflow Stages

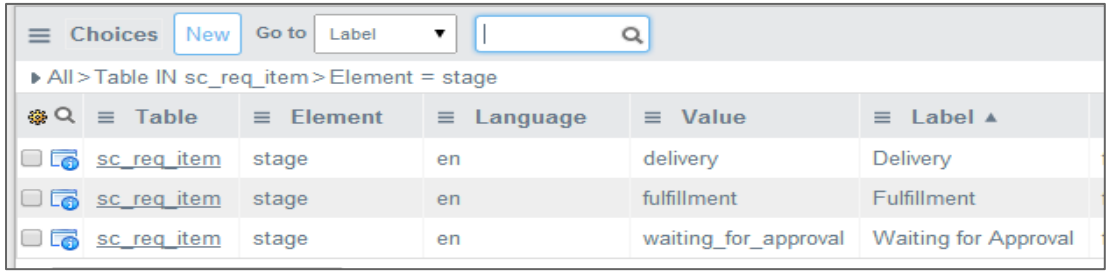
- Provide summary-level feedback about the progress of a workflow.



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Stages – Where do they come from?

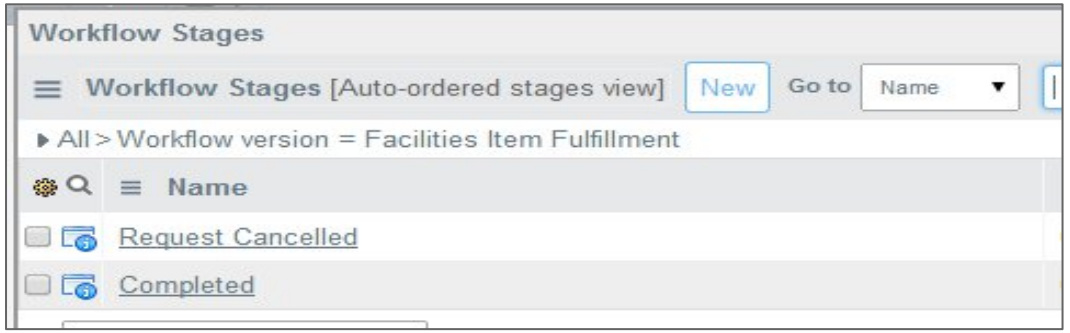
- Dictionary choices from the Stage field



- Stage Sets
- Default Stages for the table



- Workflow Specific Stages



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Stage States

- Pending – upcoming activities.
- In Progress – activities currently running.
- Completed – activities already executed.
- Note:
  - When activities transition to another activity whose stage is different than the previous, the previous stage completes.
  - Multiple activities can have the same stage.



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Stage Duration

- Amount of time to complete the stage.
- Note:
  - This is an exact amount of time.
  - No scripting
  - No calculation



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Create and Assign Workflow Stages

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.

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Lab: Try Out Your Entire Order Guide

- Navigate to **Self-Service → Facilities Catalog → Furniture and décor**
- Click on the **Facilities Order Guide**, fill out the order guide and choose options
- Data from the order guide should have cascaded down to the catalog items.
- Fill out the catalog items and submit.
- Navigate to **Service Catalog → Requests → Your Request**
- Review the stages in the Requested Items related list.

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The Catalog on your Phone

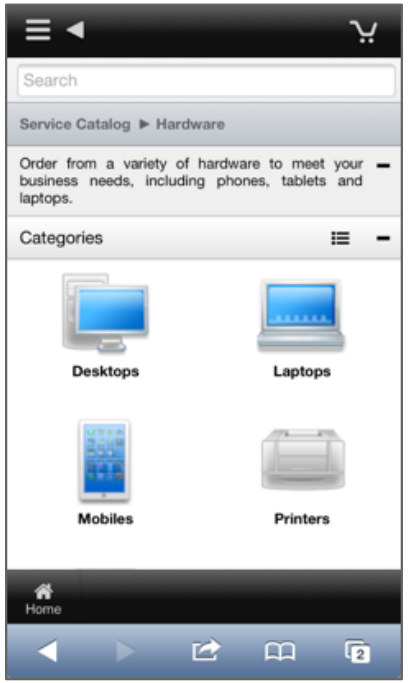
You may want to request something when you are not at your desk….

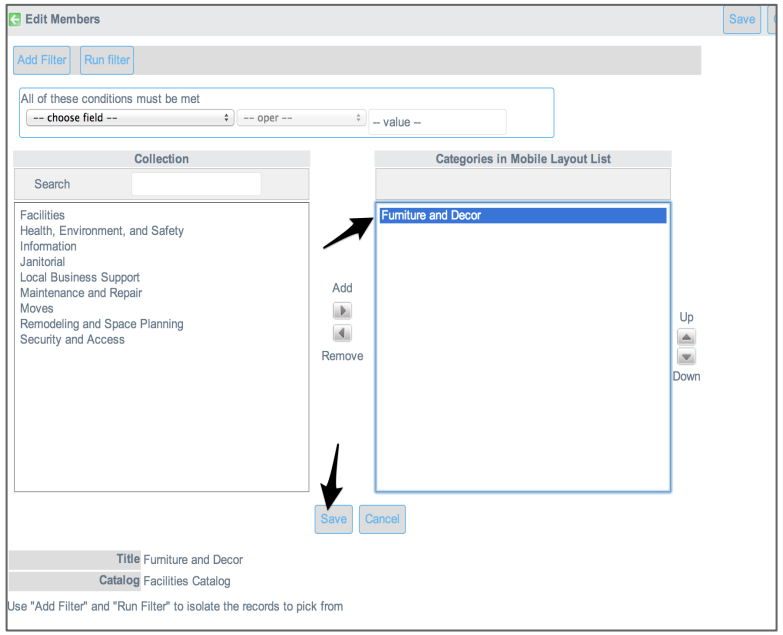
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Mobile Catalog Layout

- By default the new Facilities Catalog has no mobile layout defined.
- We can expose specific categories for the mobile view.







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Create a Facilities Catalog Mobile Layout

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

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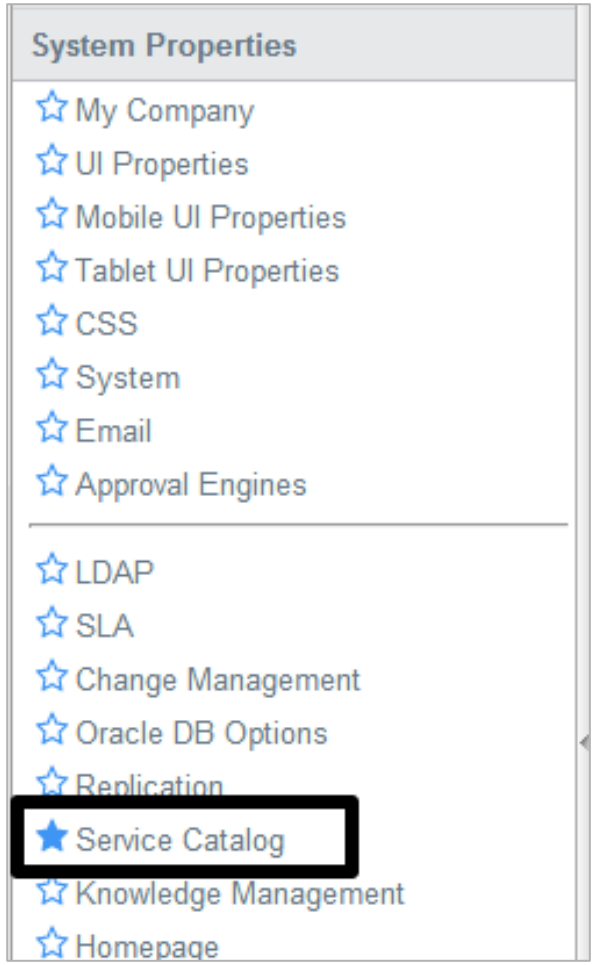
Additional Catalog Properties

Potential catalog configurations via system properties.

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What are they for?

- System Properties provide additional customization to the service catalog
- They are located in **System Properties → Service Catalog**
- There are lots of properties but let's point out a small handful.



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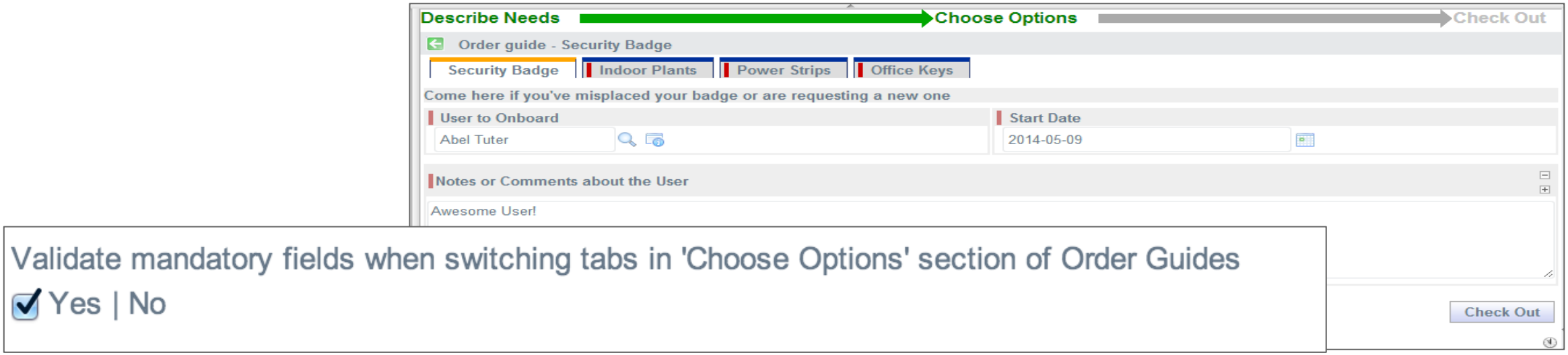
Configure Additional Catalog Properties

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Order Guide: Validate Mandatory Fields

Validate mandatory fields when switching tabs in ‘Choose Options’ section of Order Guides

- When Mandatory fields are present on the Choose Options page, you cannot click another tab till all mandatory fields are populated.
- This property allows you to select other tabs even though not all mandatory fields are populated.

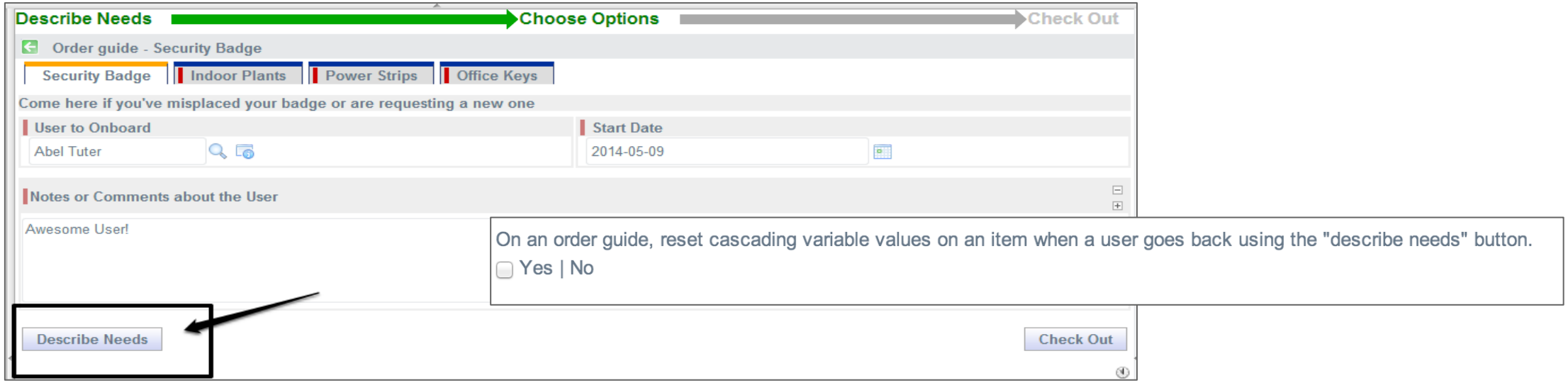


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Order Guide: Reset Cascading Variables

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

- In the Choose Options page, if someone clicks the **Describe Needs** button to return to the previous page, any variables modified will not be cascaded a second time.
- This property will cascade variables every time the choose options page is displayed.

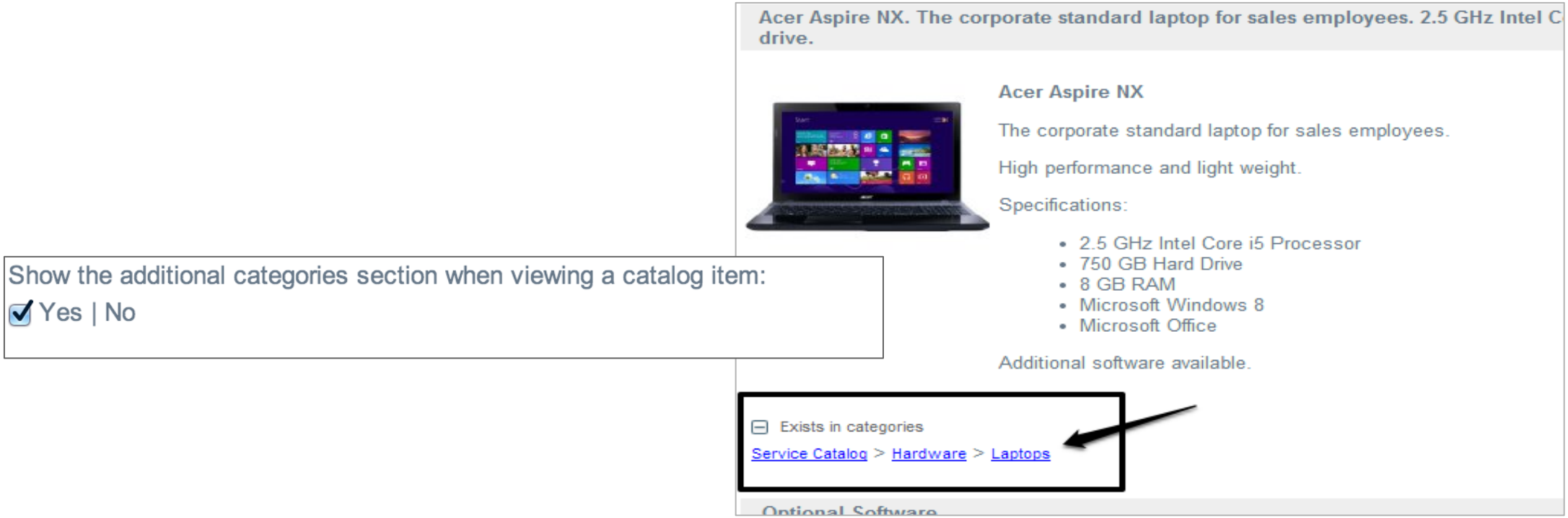


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Catalog Item: Additional Categories Section

Show the additional categories section when viewing a catalog item.

- When viewing a catalog item, if it is listed in one or many categories, these categories can or cannot be displayed on the catalog item



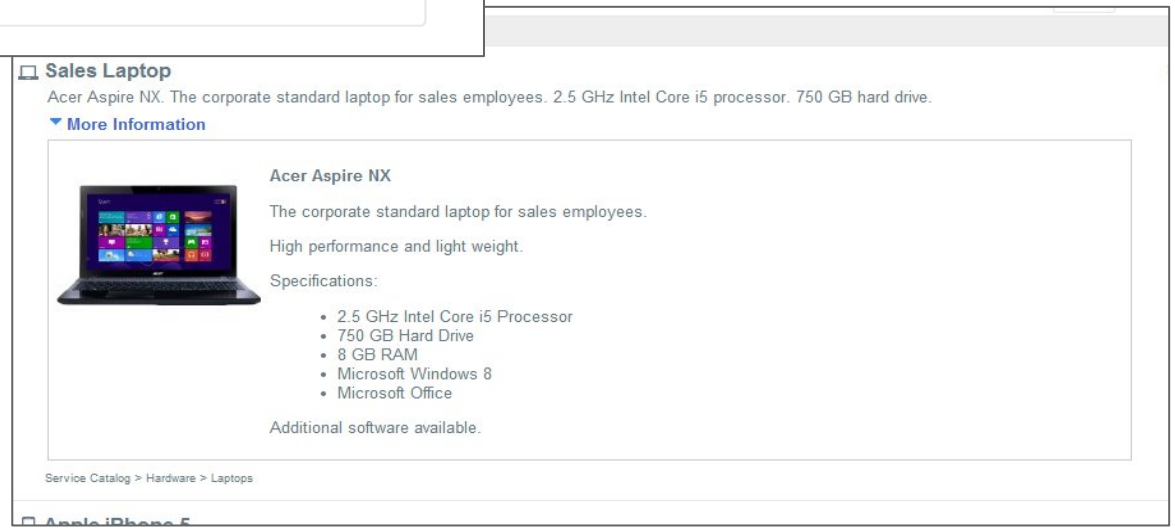
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Category: Expand More Information

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

- By default, the first two catalog items in a category list have their **More Information** (aka item description) expanded.
- This can be adjusted via property



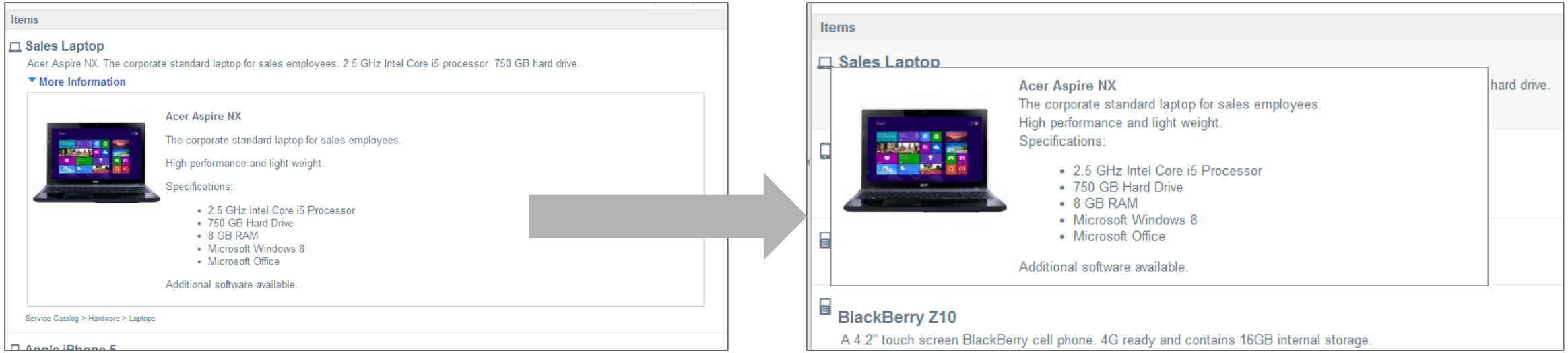


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Category: Use Popup

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.



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Top Takeaways

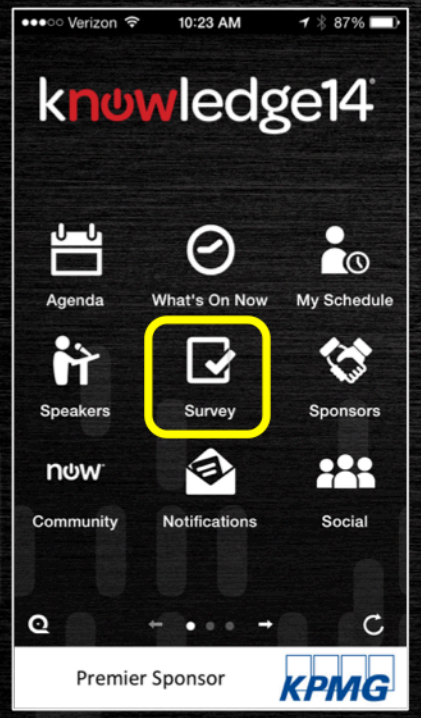
1. Create and populate a catalog and mobile catalog

2. Use Order Guides and workflow stages

3. Customize the catalog via properties

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