

# *ServiceNow Service Portals & Workflow Automation*

Office of IT ServiceNow Platform Support & Development & College  
of Sciences IT Support Teams

# COLLEGE OF SCIENCES IT SUPPORT

POWERED BY SERVICENOW

**1.**

COS Project  
Canvas

**2.**

Key  
Concepts

**3.**

The Request  
Process

**4.**

The Fulfillment  
Process

**5.**

Q&A  
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# ServiceNow Portal & Catalog Project Canvas

Designed for: **College of Sciences**

Date: **2024**

<p><b>CUSTOMERS</b></p> <ul style="list-style-type: none"> <li>Faculty</li> <li>Students</li> <li>Student Workers</li> <li>Researchers</li> <li>Research Assistants</li> <li>Staff</li> <li>Consultants</li> </ul>	<p><b>PROJECT PARTNERS</b></p> <ul style="list-style-type: none"> <li>College of Sciences IT Teams</li> <li>OIT's ITSM Process Owners</li> <li>OIT's ServiceNow Team</li> <li>Synoptek</li> </ul>	<p><b>SERVICE MODEL</b></p> <p><b>Start your day with the COS Service Portal.</b></p> <ul style="list-style-type: none"> <li>Check Status on IT Requests</li> <li>Search Knowledge Articles</li> <li>Note any IT Service Issues</li> <li>Make a Request</li> <li>Report an Incident</li> </ul> <p><b>Support Model</b></p> <ul style="list-style-type: none"> <li>Level 0: Self Service</li> <li>Level 1: COS IT (Backed by OIT)</li> <li>Level 2: Service Owner IT</li> <li>Level 3: IT Engineers, Architects, Swarm/Collaborate</li> </ul>	<p><b>SERVICE CHANNELS</b></p> <p><b>From:</b> Direct Email, Google Chat, Personal Cell, Web Sites, Google</p> <p><b>To:</b> Service Portal          "One Stop Shop" for faster more reliable service delivery &amp; status reporting.</p>	<p><b>VALUE PROPOSITION</b></p> <p>Improve Customer Experience and Operational Efficiency:</p> <ul style="list-style-type: none"> <li>Automate request fulfillment</li> <li>Enable self service capabilities</li> <li>Deliver transparency in reporting</li> <li>Measure customer sat/dissat</li> <li>Leverage security measures to keep resources safe</li> <li>Scale with customer and organizational needs</li> </ul>
<p><b>PROJECT DELIVERABLES</b></p> <p><b>Design, Build and Test:</b></p> <ul style="list-style-type: none"> <li>COS IT Service Portal</li> <li>Service Request Catalog</li> <li>Catalog Items</li> <li>Service Operations Workspace</li> <li>*Org Change Management Plan</li> </ul> <p><small>*Pending Formal Roll Out</small></p>		<p><b>COS Goals</b></p> <ul style="list-style-type: none"> <li>Centralized Access for Customers to interact with IT Services</li> <li>Improve Operational Efficiency</li> <li>Measure &amp; Communicate Outcomes to Deliver Value for their customers.</li> </ul>		

**WHY SERVICENOW**

- NC State invested in a 5 year contract.
- We continue to add features and capabilities to benefit customers and service providers.
- HR, IT and other campus departments have adopted ServiceNow.
- Purpose built to help customer's find and consume services.
- We continues to integrate business processes with the platform to centralize workflow.
- ServiceNow is the top rated platform for service management automation and has 3x the market share than its next competitor.

**IMPLEMENTATION PROCESS**

- Assess & define current state.
- Design cross functional work flows.
- Grooming sessions with ServiceNow Developers.
- Build portal, catalog, catalog items, knowledge articles.
- Test / Train / Deploy.
- Launch with customers.
- Celebrate with cake.

# KEY CONCEPTS

## PORTAL & CATALOG DEMONSTRATION

### 1. Service Portal

Gateway for customers to request products and services, access information and interact with customer service.

Highly focused on customer experience, efficiency and automation.



### 6. Service Operations Workspace

Available today for all ITIL license holders.

Robust 'Home Page' designed for Service Providers, Help Desk Analysts, IT Engineers or Operations Managers.

Numerous features available to manage customer requests or other assigned work.



### 2. Service Category

Method of structuring and organizing services for customers to easily browse, select and order the services they need.



### 5. Order Guide

Used to guide a user thru ordering several related catalog items such as a computer, accessories and system access for a new hire.

Carefully designed and coordinated, order guides offer the ability save significant time and frustration for both customers and fulfillers.



### 3. Catalog Items

**SIMPLE:** Department specific forms, flows and approvals.

Does not require a developer to code.

**STANDARD:** Complex, cross functional work flows, often requiring trained developer to configure or code.

**APPROVALS:** Used with simple or standard. Approvers do not require a ServiceNow license.

**AUTOMATION:** Requires engagement of a trained and certified developer to either build automations or the interface to an external automation tool.



### 4. Content Items

Provides information instead of products or services.

May reference knowledge articles, static blocks of text or external web-based content.

These items are not tracked within ServiceNow for the user to monitor on their "My Items" page.



# DEMO

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**3.**

**The Request  
Process**

**4.**

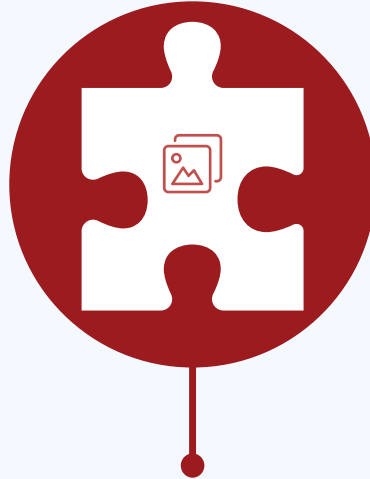
**The Fulfillment  
Process**

# QUESTIONS & KEY CONTACTS

## THE TEAM

### College of Sciences

Imraan Khan  
Ashley Arya



### Process Owners

**Nik Davlantis**

Incident & Knowledge

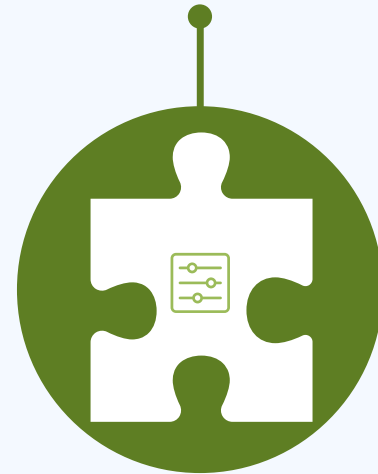
**Anthony Santucci**

IT Change Management

**Darrick Bremner & Jennifer Domnick**  
Request Fulfillment, Reporting & Analytics

### ServiceNow Platform

Jennifer Domnick  
Fernanda D'Amorim  
John Constantelos  
Danny Davis



## Back Up Slides

Catalog Item Types	Description & Use Cases
Simple Catalog Item	<ul style="list-style-type: none"> <li>• Uses “Catalog Item Designer”</li> <li>• Simple forms, flows and approvals</li> <li>• 1 or many tasks and inter-departmental assignment groups (fulfillers)</li> <li>• Does not require a developer skill set to create</li> <li>• Create and maintain catalog items in a department specific catalog</li> <li>• <u>Use Cases</u>: Request a computer accessory, University approved software, request a new report or dashboard.</li> </ul>
Standard Catalog Item	<ul style="list-style-type: none"> <li>• Requires a Certified Systems Administrator credential and additional training</li> <li>• More in-depth forms, flows and approvals</li> <li>• 1 or many tasks and cross-departmental assignment groups (fulfillers)</li> <li>• Create and maintain catalog items for services provided to multiple Colleges or Departments</li> <li>• <u>Use Cases</u>: A catalog item to order a new database for a research team that requires ‘Department A’ to set up the database and load required operating system and ‘Department B’ to create and provision the user accounts.</li> </ul>
Simple or Standard Using Approvals	<ul style="list-style-type: none"> <li>• Non-licensed approvers will receive approval requests via an email.</li> <li>• Licensed approvers will receive approval requests via email and will be assigned an approval task. These approvers can track and manage all approval requests from their “My Approvals” view on the portal.</li> </ul>
Standard Catalog Item with Automation	<ul style="list-style-type: none"> <li>• Requires a Certified Systems Administrator credential and additional training</li> <li>• More in-depth forms, flows and approvals</li> <li>• 1 or many tasks and cross-departmental assignment groups (fulfillers)</li> <li>• Create and maintain catalog items for services provided to multiple Colleges or Departments</li> <li>• Automation developed internal or external to ServiceNow</li> <li>• <u>Use Cases</u>: A catalog item to order and ‘automatically provision’ software after approval is granted</li> </ul>
Content Item	<ul style="list-style-type: none"> <li>• A service catalog item that provides information instead of goods or services.</li> <li>• Content items may reference knowledge articles, static blocks of text or external web-based content.</li> <li>• Any service that is provided outside of the ServiceNow platform is not tracked for the user to reference at a later time on their “My Items” page.</li> <li>• <u>Use Cases</u>: Request Information about hardware or software standards in a knowledge article or request software that is provisioned outside of the ServiceNow platform.</li> </ul>
Order Guide	<ul style="list-style-type: none"> <li>• An order guide is used to guide the user into ordering multiple items.</li> <li>• The back end system follows a taxonomy for tracking and managing the request: Request &gt; Request Items &gt; Tasks.</li> <li>• Significantly streamlines an order process for the person making the request and does not require the requestor to have “institutional knowledge.”</li> <li>• Allows the service provider to streamline the provisioning process across multiple teams and set standards that result in meeting on time and accuracy goals.</li> <li>• <u>Use Cases</u>: Employee lifecycle management (Onboarding, job changes, offboarding). Setting up a new research program, order storage, databases, operating systems and software.</li> </ul>