BRC ServiceNow Training

September 2017

Agenda

- What is ServiceNow?
  - Present vs. Future
  - Benefits of ServiceNow
- How do I use it?

ServiceNow

What is it?

- UCOP ITCS Service Desk managed
- UC Single Sign-on
- Ticketing system

ServiceNow

What does it do?

- Send and track all requests to BRC
- Submit & approve electronically
- Eliminates Dept & BRC logs!
- Status reports
- Storage for documents
- Communication tool (Transparency!!)

ServiceNow

Simply put…

Initiate

Track

Report

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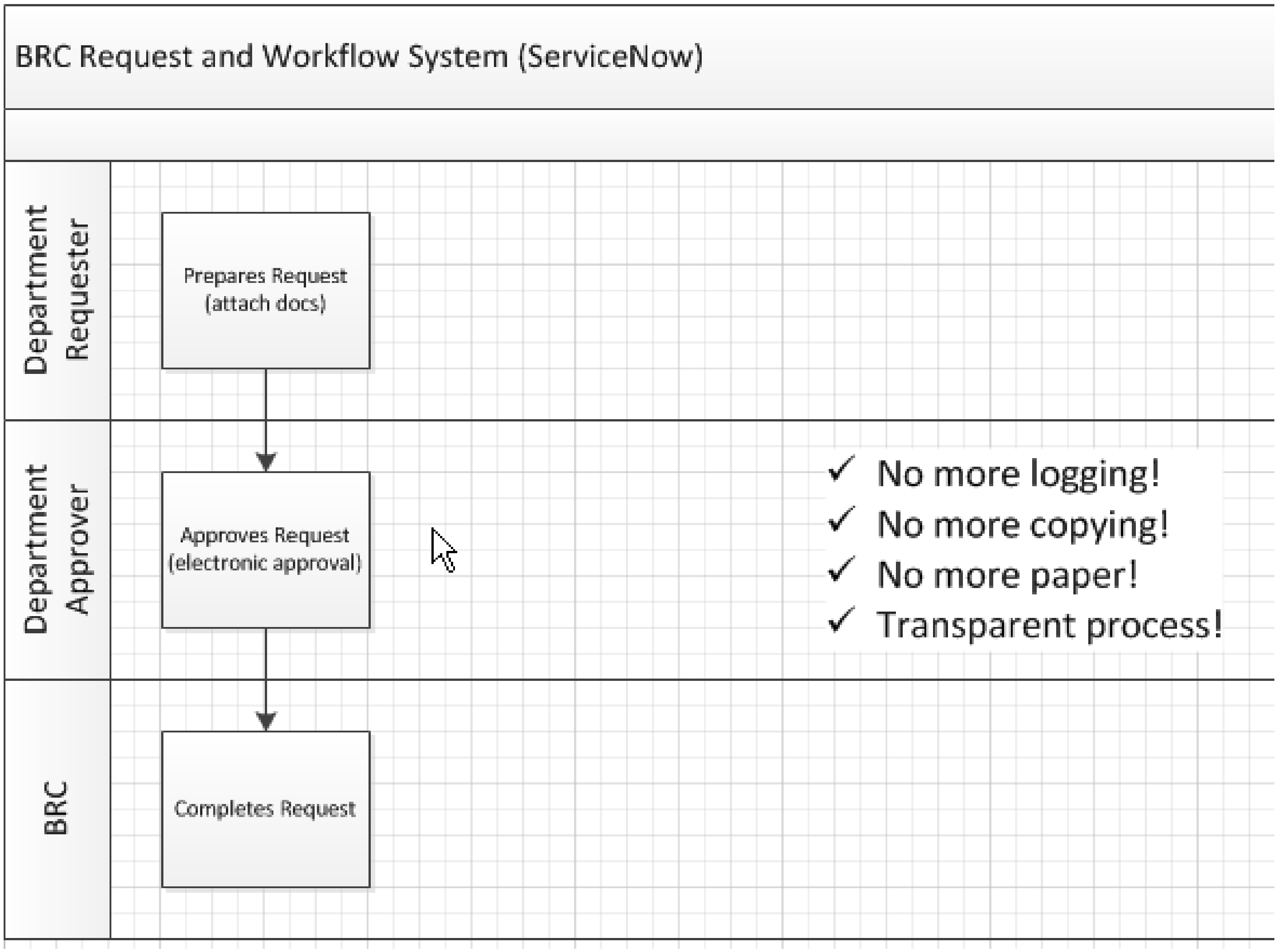
ServiceNow

Process **with** ServiceNow



How do I use it?

UNIVERSITY OF CALIFORNIA Office of the President service hub

https://ucop.service-now.com

Chrome & FireFox work best

UCOP ID & Password

NOTE: You need to log on once to activate your account in ServiceNow.

Your name will not appear as a user/approver until you have logged on for the first time.

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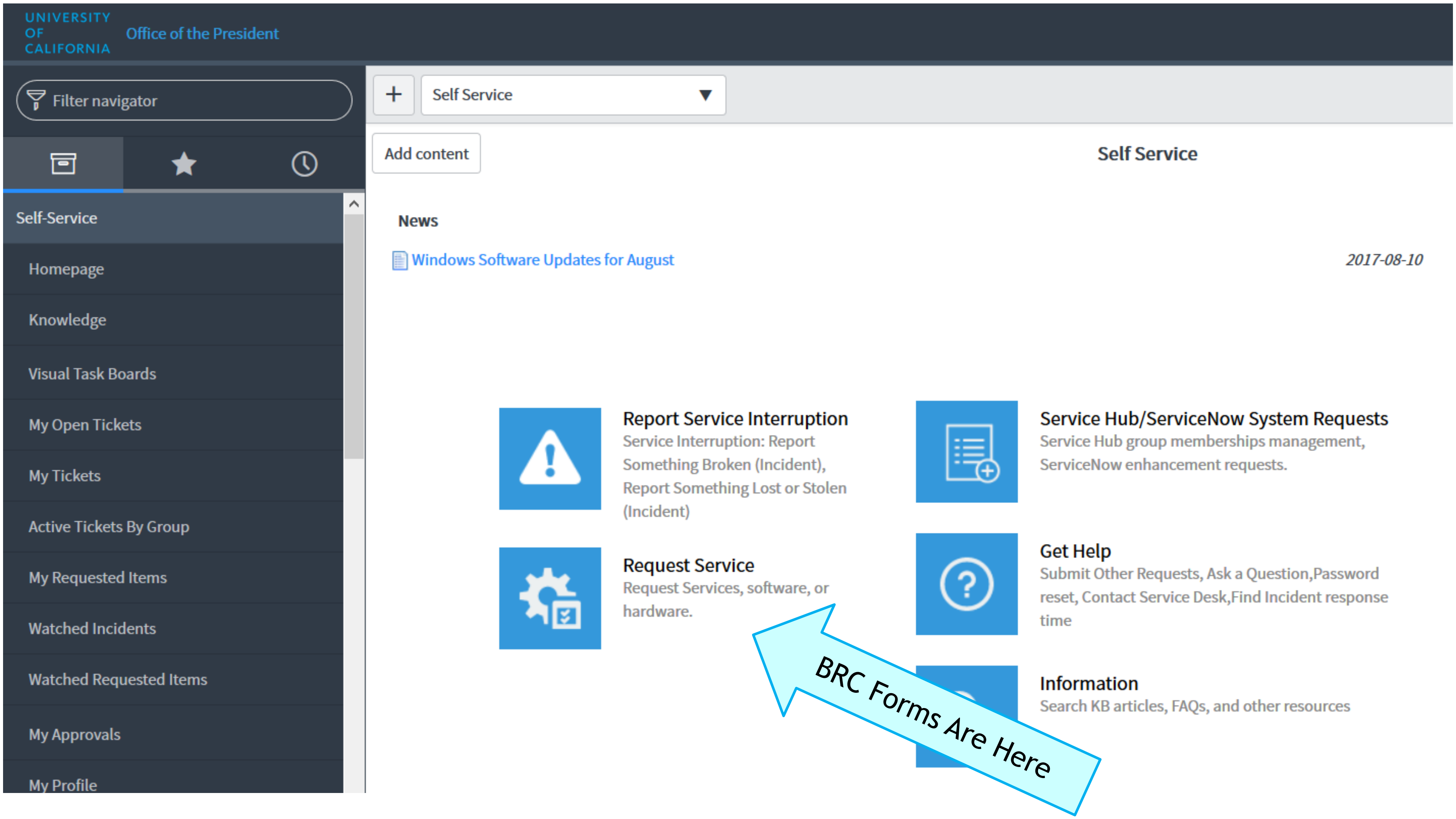
How do I use it?



How do I use it?

UNIVERSITY OF CALIFORNIA Office of the President service hub

Service Catalog > Request Service

Request Service

Request Services, software, or hardware.

Related Categories

Accounts, Email, Calendar
General Requests for UCOP Accounts, Email and Calendar

Business Resource Center
General Requests for Non-Payroll Services

BRC Forms Are Here

Collaboration: Zoom, SharePoint, Videoconferencing, Box
General Requests for 3rd Party Audio, Desktop Video and Web Collaboration tools

Work Equipment: Computers, Phones and Software
General Requests and support for UCOP Computers, Phones, Jabber and Software

Application and Data Services
ITS Requests for UCOP Applications and Data Systems

ITS Only: Infrastructure and Engineering Requests
ITS Requests for UCOP Infrastructure and Engineering Systems

Onboarding Services
New Employee IT provisioning

UCPC Staff Only
UCPC Internal Work Requests and Incidents

BRC Form Menu

Business Resource Center

General Requests for Non-Payroll Services

Items

Generate a report for BRC requests by department

On demand department report

Related Categories

- Local Procurement (L-Proc)
- Compliance, Accounting, Audit and Policy (CAAP)
- Purchase Order and Payments (POP)
- Travel and Entertainment requests

New Forms

Forms…

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Local Procurement (L-Proc)

Items
Contract
PO Change Order (L-Proc)
RFx

Compliance, Accounting, Audit and Policy (CAAP)

Items
Cost Transfer
Signature Delegations
System Access Request
Travel and Entertainment Card Application

Travel and Entertainment requests

Items
Travel & Business Entertainment Reimbursement
T&E PTA
V-Card Hotel Request

Forms

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And more forms…

Purchase Order and Payments (POP)

Items

- **BRC Ergo** – Submit your EH&S approved order
- **Catering** – Submit catering invoices; include list of attendees and agenda
- **Conference/Training Registration** – Submit conference and training registrations; These items marked "Urgent"
- **Contracts & Grants/Subawards** – Establish a PO for C&G/Subawards
- **Contributions, Donations, & Sponsorships** – Submit contribution, donation, or sponsorship payment requests
- **Establish a PO (Goods)** – Create a PO to order goods
- **Establish a PO (Services)** – Create a PO to order services
- **Event/Meeting Contract** – Create a PO for an event/meeting. Pay deposit to vendor
- **Gift Cards/Non-Cash Awards** – Order gift cards for SPOT awards
- **Honorarium/Stipend/Scholarship** – Pay honorarium/stipend/scholarships
- **Membership** – Pay membership dues
- **Office Supply Order** – Order office supplies
- **Pay Invoice with PO** – Pay an invoice with an established PO; Approval not required (Select "Approval attached")
- **Pay Invoice without PO** – Pay an invoice without a PO; Approval is required
- **Pcard - BRC** – Place order using the BRC Pcard
- **PCard - Dept** – Submit receipts for order placed with Departmental Pcard
- **PO Change Order** – Request a change order to a PO
- **Reimburse for Goods/Services (Non-T&E)** – Submit receipts to reimburse individuals for non-travel and entertainment purchases only
- **Relocation Expense**
- **Request for Event Planning** – Request for Event Planning Services provided by ESG
- **Subscription** – Pay subscription fees
- **Utilities** – Pay Utility invoices (PG&E, EBMUD, etc)

More forms

Why all the forms???

Why all the forms??

- Feedback received
- Policy assistance
- Priority setting
- Metrics reporting

How do I use it?

Membership
Pay membership dues

Office Supply Order
Order office supplies

Pay Invoice with PO
Pay an invoice with an established PO; Approval not required (Select "Approval attached")

Pay Invoice without PO
Pay an invoice without a PO; Approval is required

Pcard - BRC
Place order using the BRC Pcard

PCard - Dept
Submit receipts for order placed with Departmental Pcard

PO Change Order
Request a change order to a PO

Reimburse for Goods/Services (Non-T&E)
Submit receipts to reimburse individuals for non-travel and entertainment purchases only

Request for Event Planning
Request for Event Planning Services provided by ESG

Subscription
Pay subscription fees

Utilities
Pay Utility invoices (PG&E, EBMUD, etc)

Let's take a look!

How do I use it?

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Standard on all forms

Requestor Info

Name
Amy Vrizuela

Email
Amy.Vrizuela@ucop.edu

Phone
(510)987-9135

Department
Business Resource Center

How do I use it?

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Office of the President
service hub

Standard on all forms

Request Information

* Requested on behalf of (yourself or someone else)

Receives notification

* Request description

What is it?

* Business justification (purpose)

What is the UC purpose?

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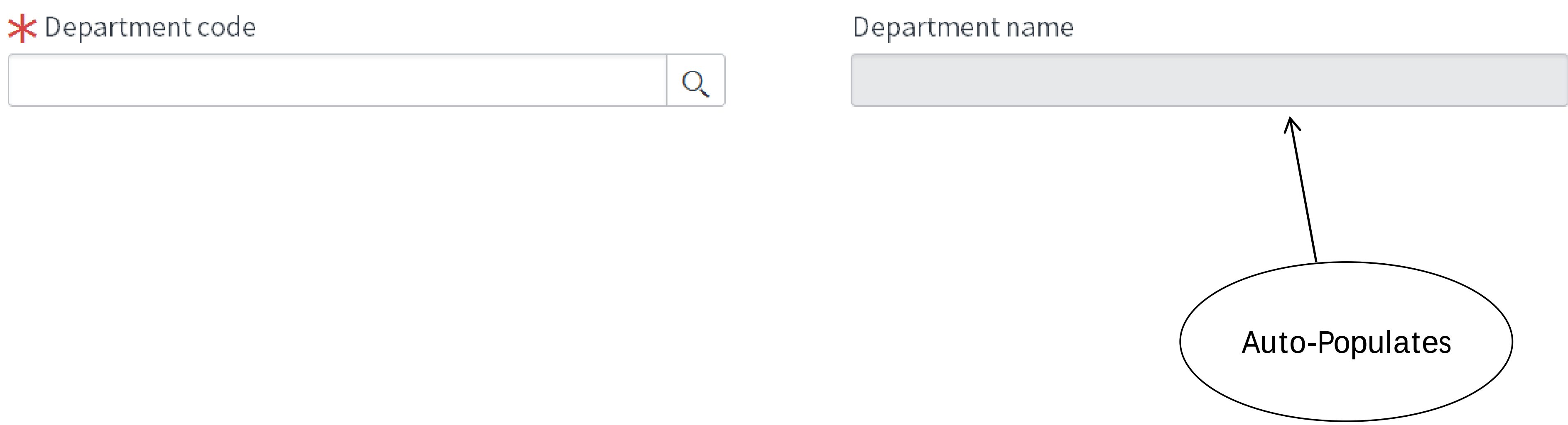
How do I use it?

Standard on all forms



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How do I use it?

Rush!

* Department code

Department name

Rush

No

Rush

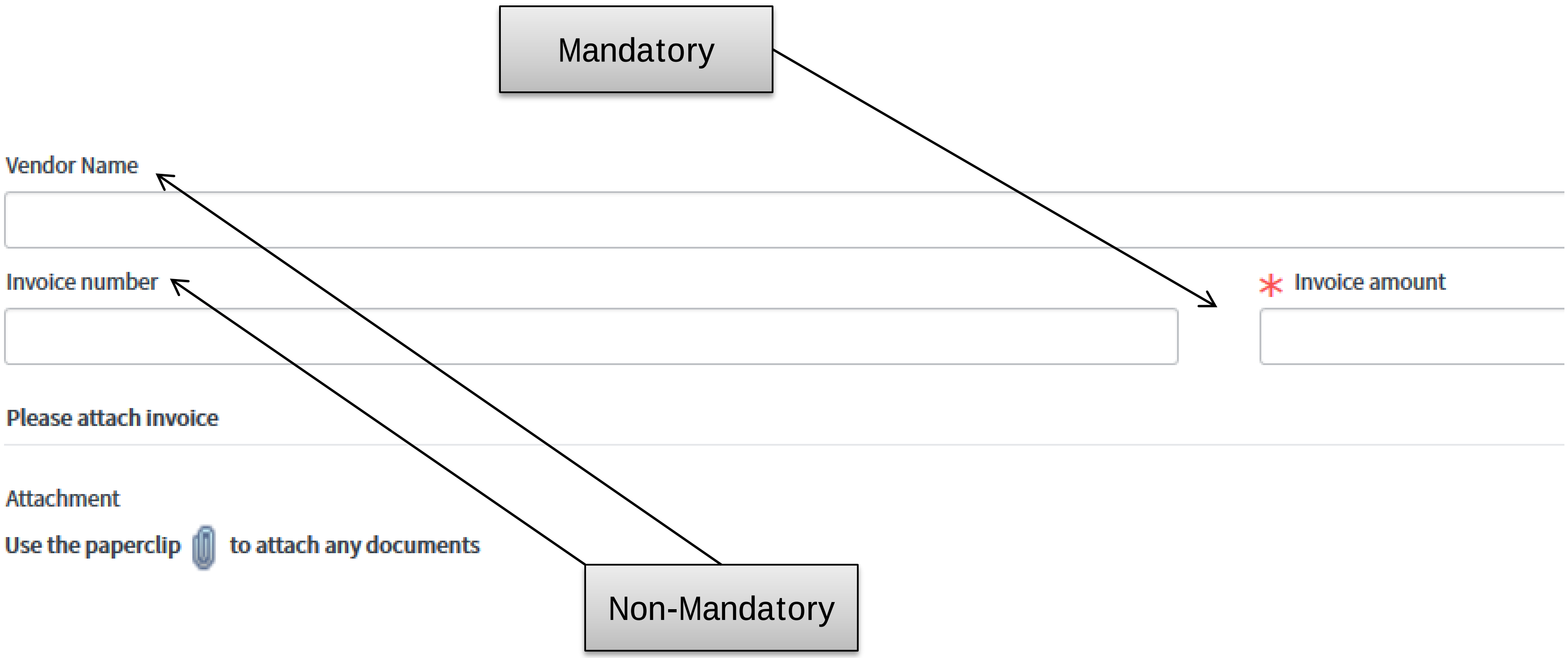
Yes

* Reason for rush request

* Date needed by

How do I use it?

Mandatory v. Non-mandatory



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How do I use it?

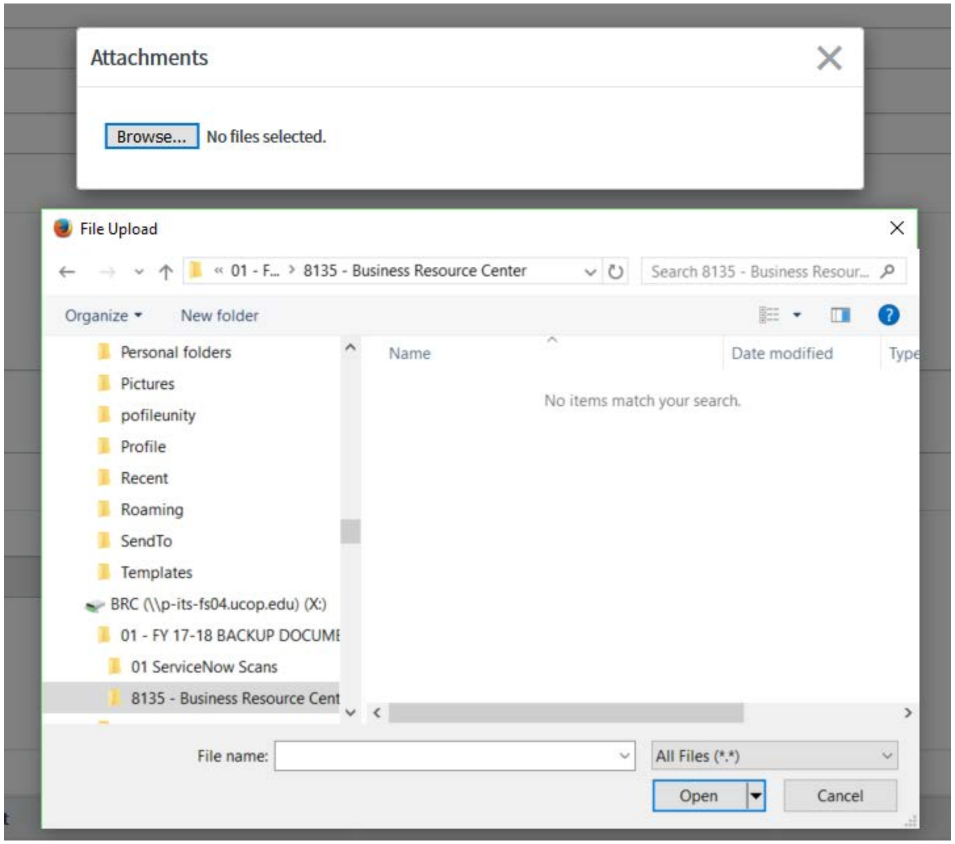
Attachments

Click to attach

Please attach invoice

Attachment

Use the paperclip to attach any documents



How do I use it?

Additional comments or Instructions

Additional comments or instructions

How do I use it?

UNIVERSITY OF CALIFORNIA Office of the President service hub

FAUs & Approvers

Automatically populates from form

Click to add a new FAU distribution

FAU Distribution

Total amount

1000.00

Amount type

% (Percentage)

$ (Dollars)

Add Row | Clear All

FAU*	Project	Source	Amount

Choose Approvers | Approval attached | Edit FAU | Check Balance

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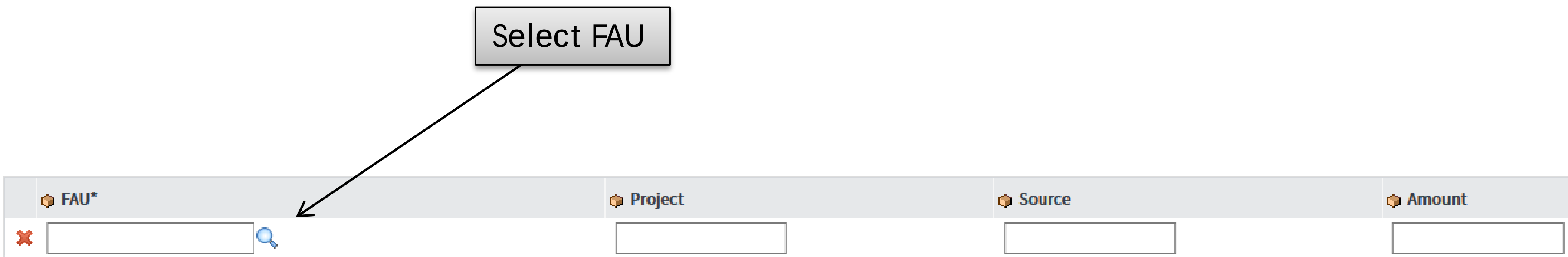
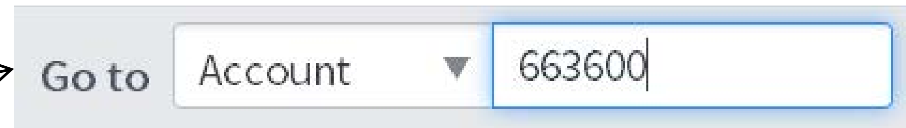
How do I use it?

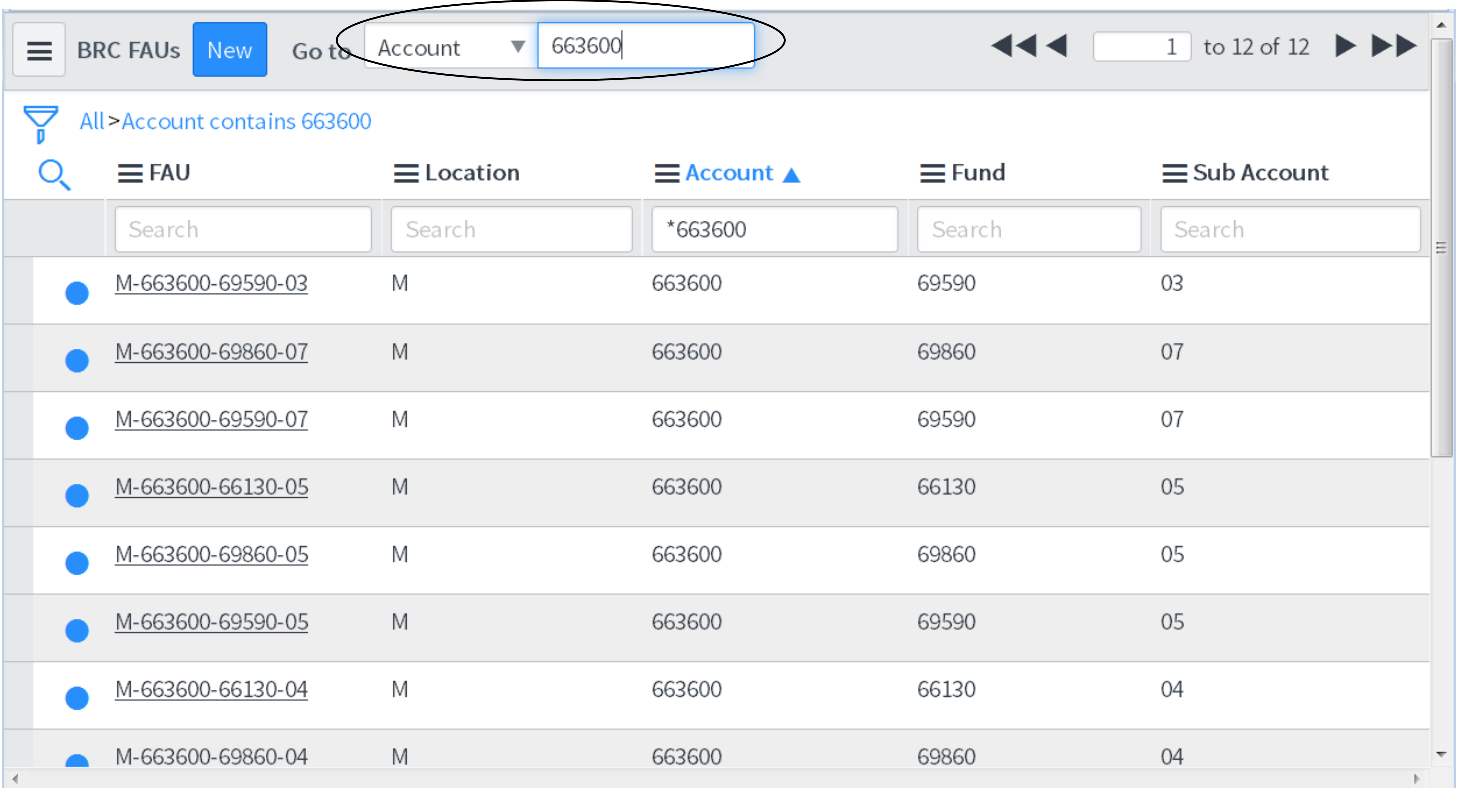
FAUs & Approvers



How do I use it?

Select Account





FAU	Location	Account ▲	Fund	Sub Account
Search	Search	*663600	Search	Search
M-663600-69590-03	M	663600	69590	03
M-663600-69860-07	M	663600	69860	07
M-663600-69590-07	M	663600	69590	07
M-663600-66130-05	M	663600	66130	05
M-663600-69860-05	M	663600	69860	05
M-663600-69590-05	M	663600	69590	05
M-663600-66130-04	M	663600	66130	04
M-663600-69860-04	M	663600	69860	04

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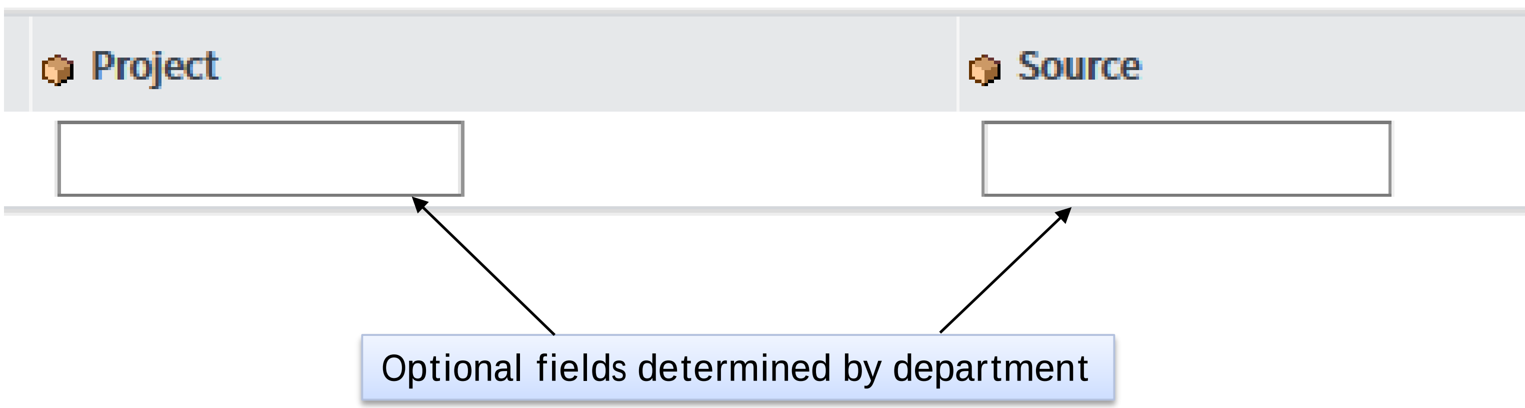
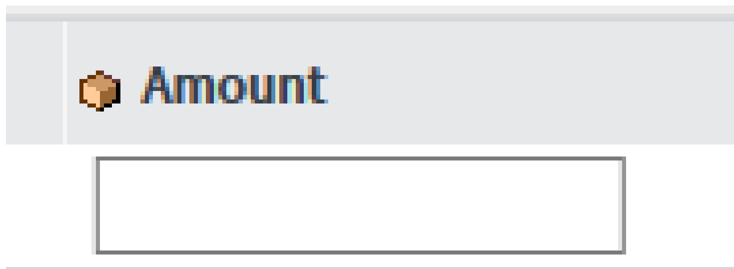
How do I use it?

Enter project/source



How do I use it?

Enter amount

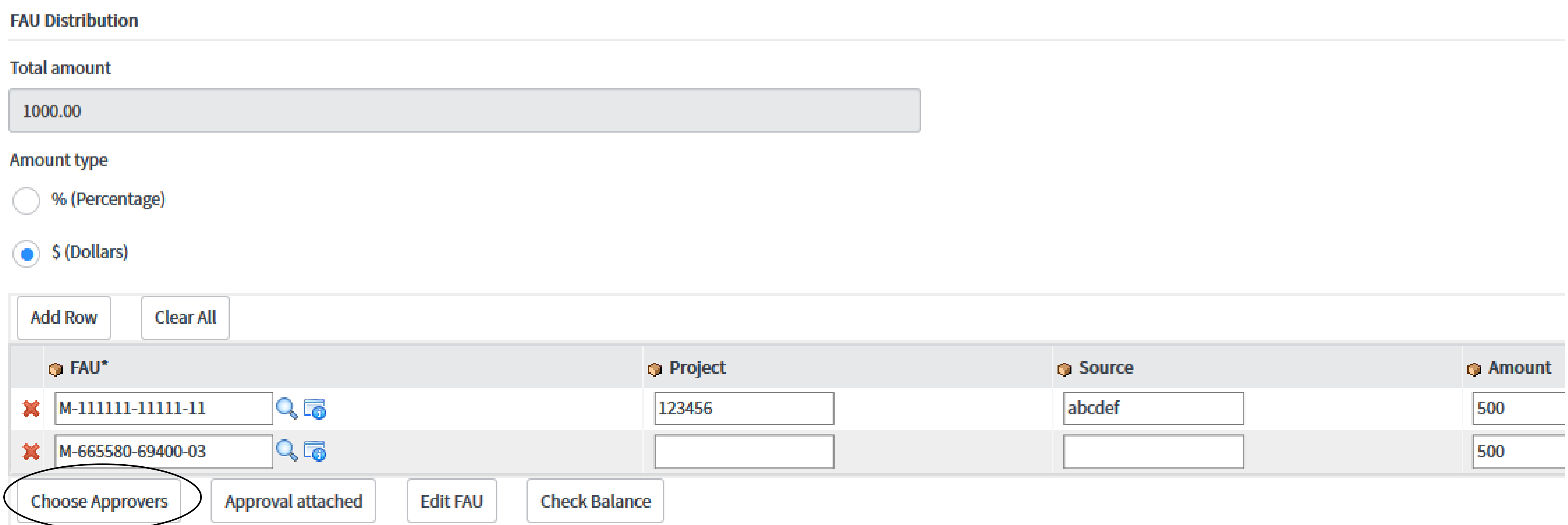


Enter amount that should be distributed to the FAU selected for this line.

- You can distribute the total amount
- If you are splitting FAU's, make sure the total amount of all lines equals the Total amount listed in the form

How do I use it?

Approval



Select Choose Approvers to select the approvers for each FAU included in the FAU Distribution

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How do I use it?

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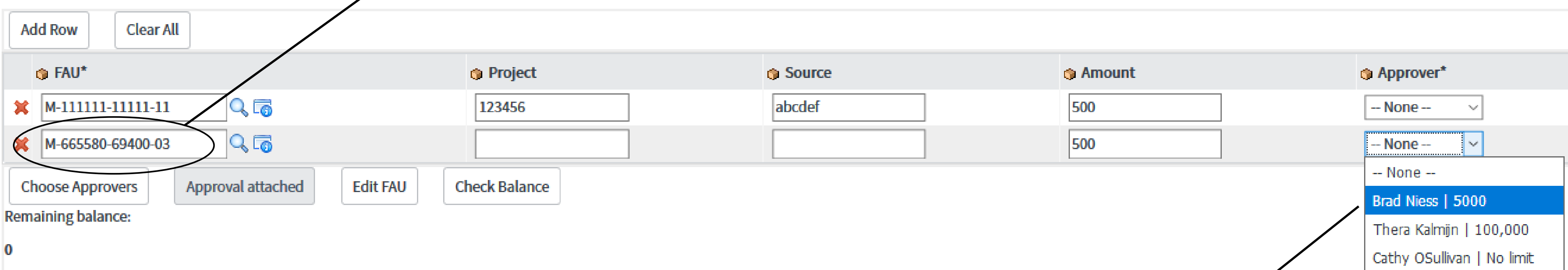
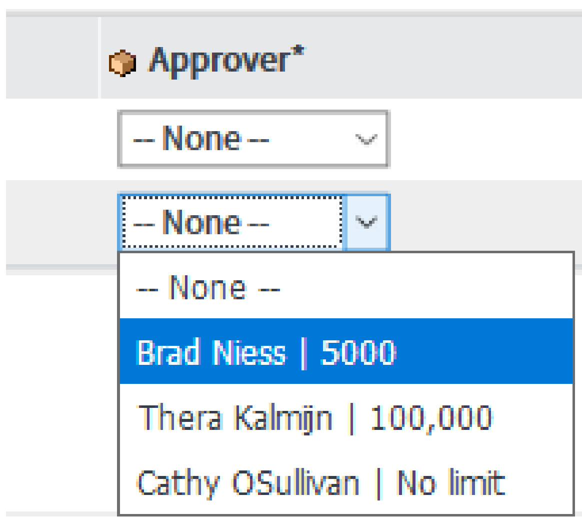
Approval

When you click on Choose Approvers, you will be given a drop down with the names of those authorized to approve against the FAU selected



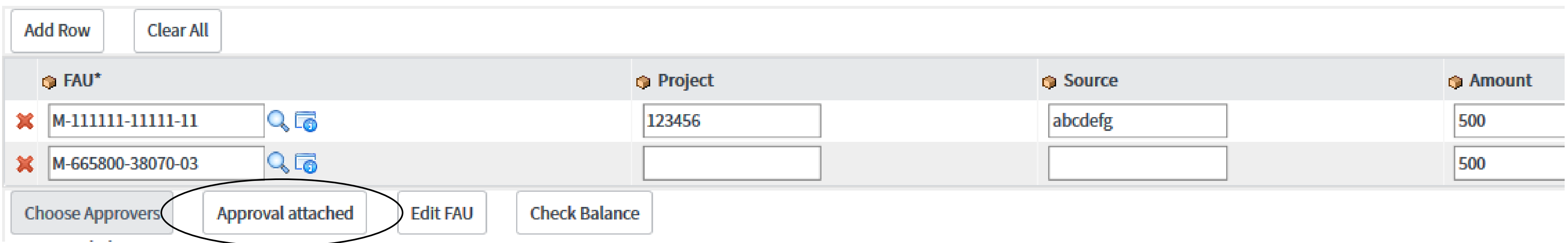


A general rule of thumb is to select the person with the lowest delegated authority, unless your department has other rules around who approvers which transactions.

How do I use it?

UNIVERSITY OF CALIFORNIA Office of the President service hub

Approval



Click on the Approval attached button if you have scanned and attached a copy of the approval to the request.

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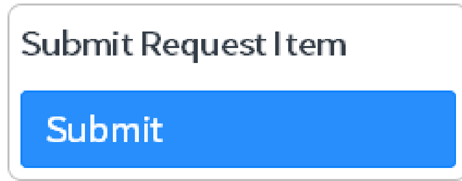
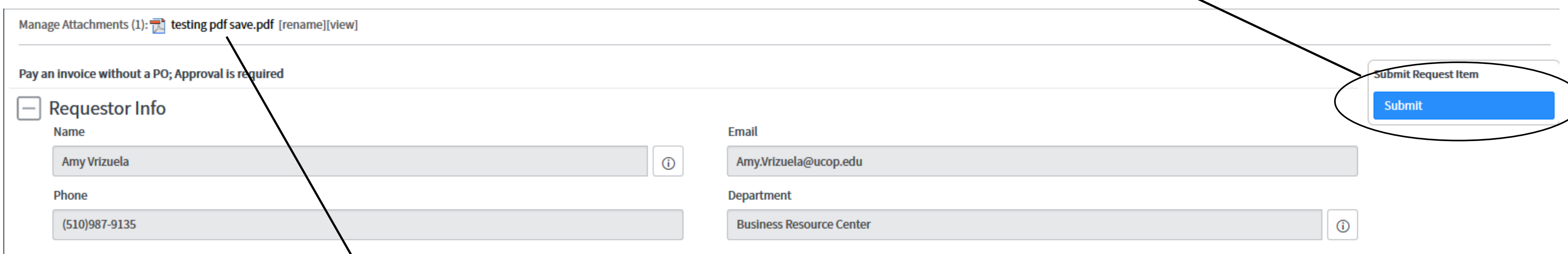
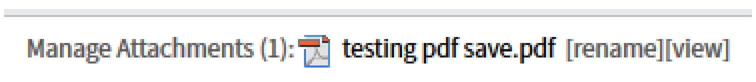
How do I use it?

Submit!







Note that the documents you attached to the request are listed at the top of the request form. This makes it easy for you to double check that your files are attached before submitting your request to the BRC.

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How do I use it?

Submitted!

Order Status

Thank you, your request has been submitted

Order Placed: 2017-09-18 11:18:50 AM

Request Number: REQ0160903

Number	Description
RITM0167530	Pay an invoice without a PO; Approval is required

Back to Catalog | Continue Shopping

Your tracking number

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Notifications

Ticket open

IT Service Hub <ucop@service-now.com> Amy Vrizuela 11:19 AM

Requested Item RITM0167530 has been opened on behalf of Amy Vrizuela; Subject: Pay Invoice without PO

Retention Policy UCOP E-Mail Management Policy – Inbox (1 year) Expires 9/18/2018

Action Items + Get more apps

Requested Item RITM0167530 has been submitted.

Priority: Request

Short description: Pay Invoice without PO

Ticket summary: Details: Name = Amy Vrizuela Email = Amy.Vrizuela@ucop.edu Phone = (510)987-9135 Department = Business Resource Center Requested on behalf of (yourself or someone else) = Amy Vrizuela Request description = Test form for training presentation to demonstrate how to complete the form Business justification (purpose) = Training on how to use ServiceNow to submit requests electronically to the BRC using ServiceNow. Department code = 8135 Department name = BUSINESS RESOURCE CENTER Rush = No Vendor Name = Testing Invoice number = Amy testing Invoice amount = 1000 Total amount = 1000 Amount type = $ (Dollars) FAU(s) distribution: FAU = M-111111-11111-11 | Approver = FAU = M-665800-38070-03 | Approver =

To review your ticket please refer Requested Item RITM0167530 or click on the link RITM0167530.

Thank you for contacting UCOP BRC Purchase Order and Payments (POP) Team
BRCPurchaseandPay@ucop.edu

Notifications

UNIVERSITY OF CALIFORNIA Office of the President service hub

Approval email

IT Service Hub <ucop@service-now.com> | Amy Vrizuela

Requested Item RITM0167536 Approval Request

Retention Policy UCOP E-Mail Management Policy – Inbox (1 year)

Action Items

You are being asked to approve a service request via the IT Service Hub.

Request Item:
RITM0167536 - Pay Invoice without PO

Summary of Request:
Details:
Name = Amy Vrizuela
Email = Amy.Vrizuela@ucop.edu
Phone = (510)987-9135
Department = Business Resource Center
Requested on behalf of (yourself or someone else) = Amy Vrizuela
Request description = Test RITM for ServiceNow Training
Business justification (purpose) = Test RITM to demonstrate system usage.
Department code = 8135
Department name = BUSINESS RESOURCE CENTER
Rush = No
Invoice amount = 50.00
Total amount = 50.00
Amount type = $ (Dollars)
FAU(s) distribution:

FAU = M-665582-69400-03 | Approver = Amy Vrizuela

Requested by:
Amy Vrizuela

If you need more information about the request, click one of the "LINK" options at the bottom of this message.
Please review the details of this request and approve or reject it by clicking one of the links below:

Click here to approve RITM0167536

Click here to reject RITM0167536

Click here to view Requested Item: LINK
Click here to view Approval Request: LINK

Notifications

UNIVERSITY OF CALIFORNIA Office of the President service hub

Approval email continued

If you need more information about the request, click one of the "LINK" options at the bottom of this message.
Please review the details of this request and approve or reject it by clicking one of the links below:

[Click here to approve RITM0167536]

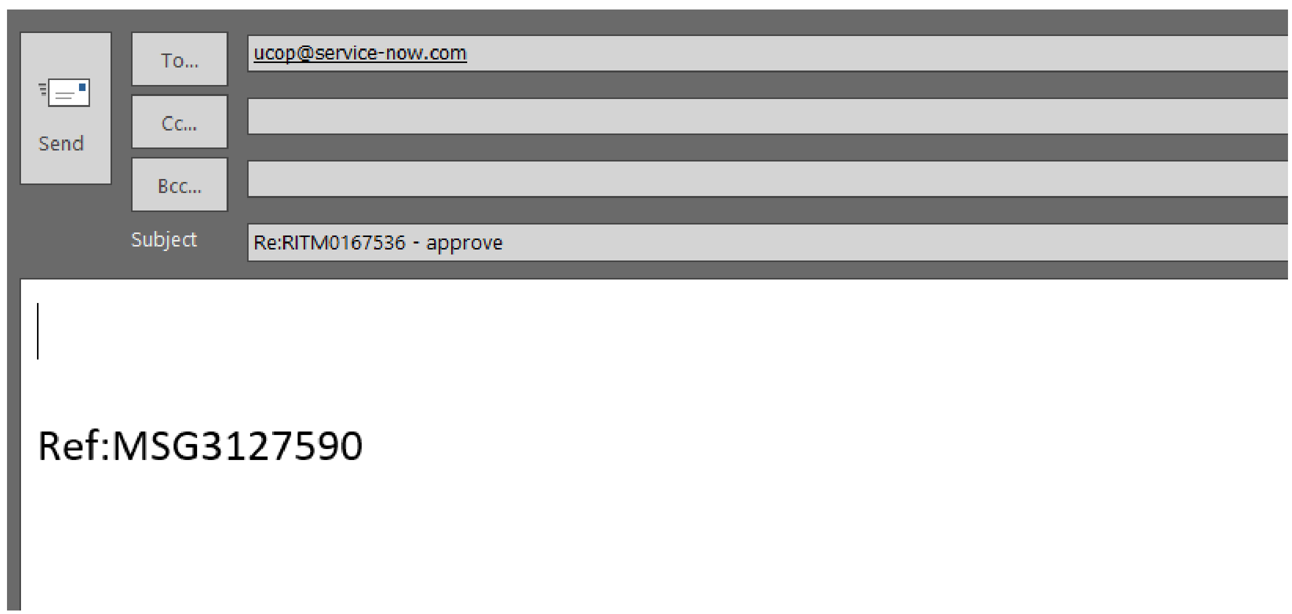
Click to approve or reject via email

[Click here to reject RITM0167536]

Click here to view Requested Item: [LINK]
Click here to view Approval Request: [LINK]

Click to view in ServiceNow

Click send to approve



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Notifications

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Updates & questions

Simply reply to the e mail string, and your response will be automatically added to the request in ServiceNow!

The e mail will contain a record of all of the information you originally entered into your request.

IT Service Hub <ucop@service-now.com> Amy Vrizuela

Requested Item RITM0168583 has been commented -- Cost Transfer

Retention Policy UCOP E-Mail Management Policy - Inbox (1 year)

You forwarded this message on 9/25/2017 12:51 PM.

Action Items

Ref:MSG3153497

2017-09-25 12:01:00 PM PDT - Jan Kehoe Additional comments
reply from: Jan.Kehoe@ucop.edu

Yes! I received an email from the system.

Thanks,
jan

From: IT Service Hub [mailto:ucop@service-now.com]
Sent: Monday, September 25, 2017 11:49 AM
To: Jan Kehoe <Jan.Kehoe@ucop.edu>
Subject: Requested Item RITM0168583 has been commented -- Cost Transfer

Requested Item RITM0168583 has been commented. Please address the Requested Item and update the Req

Priority: Request

Ticket summary: Details: Name = Amy Vrizuela Email = Amy.Vrizuela@ucop.edu<mailto:Amy.Vrizuela@
Business justification (purpose) = testing form Department code = 8135 Department name = BUSINESS RE
services = NonPear Do you want to attach form or provide information on this form? = Complete form belo
made after 120 days of the original transaction date or 90 days after fund expiration? = No Please profide an
UCSB = false UCR = false UCSC = false UCSD = false UCSF = false General Ledger = false Campus Agre
id = f56ed72fdbd9c34003fd79531f9619fb FAU(s) distribution: FAU = M-111111-11111-11 | Approver =

Comments:

2017-09-25 11:48:29 AM PDT - Amy Vrizuela Additional comments
Jan, are you seeing my notes. I am updating the RITM I did on your behalf. Thank you.

Amy

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Notifications

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Completed

IT Service Hub <ucop@service-now.com> | Amy Vrizuela

RITM0167536; Completed; Pay Invoice without PO

Retention Policy UCOP E-Mail Management Policy – Inbox (1 year) Expires 9/18/2018

Action Items

Your request RITM0167536 has been completed.

Short Description: Pay Invoice without PO
Additional comments:
Close notes:
Priority: Request

To view the status of your request, please go to the IT Service Hub and reference Request RITM0167536 or click on this direct link RITM0167536.

UCOP IT Service Desk
(510) 987-0457
ServiceDesk@ucop.edu

Ref:MSG3127740

How do I use it?

Status

Self-Service

- Homepage
- Knowledge
- Visual Task Boards
- My Open Tickets
- My Tickets
- Active Tickets By Group
- My Requested Items
- Watched Incidents
- Watched Requested Items
- My Approvals

All > Active = true > Requested by = Amy Vrizuela .or. Caller [Incident] = Amy Vrizuela .or. Request [Requested Item] User Name = Amy Vrizuela > Task type = Incident .or. Task type = Requested Item .or. Task type = Change Request > Stat Authorized – Approved\Scheduled, Imp)

Number	Priority	User Name	Subject	State	Created	Updated
INC0150387	3 - Routine (3 day resolution)	Amy Vrizuela	BRC Form: Cost Transfer: missing additional comments or worknotes on the RITM	Open	2017-09-12 11:38:07 AM	2017-09-15 09:28:13 AM
RITM0165405	Request		Relocation Expense	Work in Progress	2017-09-01 01:25:26 PM	2017-09-06 11:09:49 AM
RITM0165785	Request		Relocation Expense	Work in Progress	2017-09-06 11:04:18 AM	2017-09-06 11:04:58 AM
RITM0081770	Request		Pcard - BRC	Work in Progress	2015-12-04 09:03:02 AM	2017-05-04 10:05:56 PM
RITM0025716	Request		Laptop Loaner Request	Open	2013-09-30 10:13:11 AM	2014-10-28 11:59:57 AM

Actions on selected rows...

How do I use it?

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Status/Searching Requests

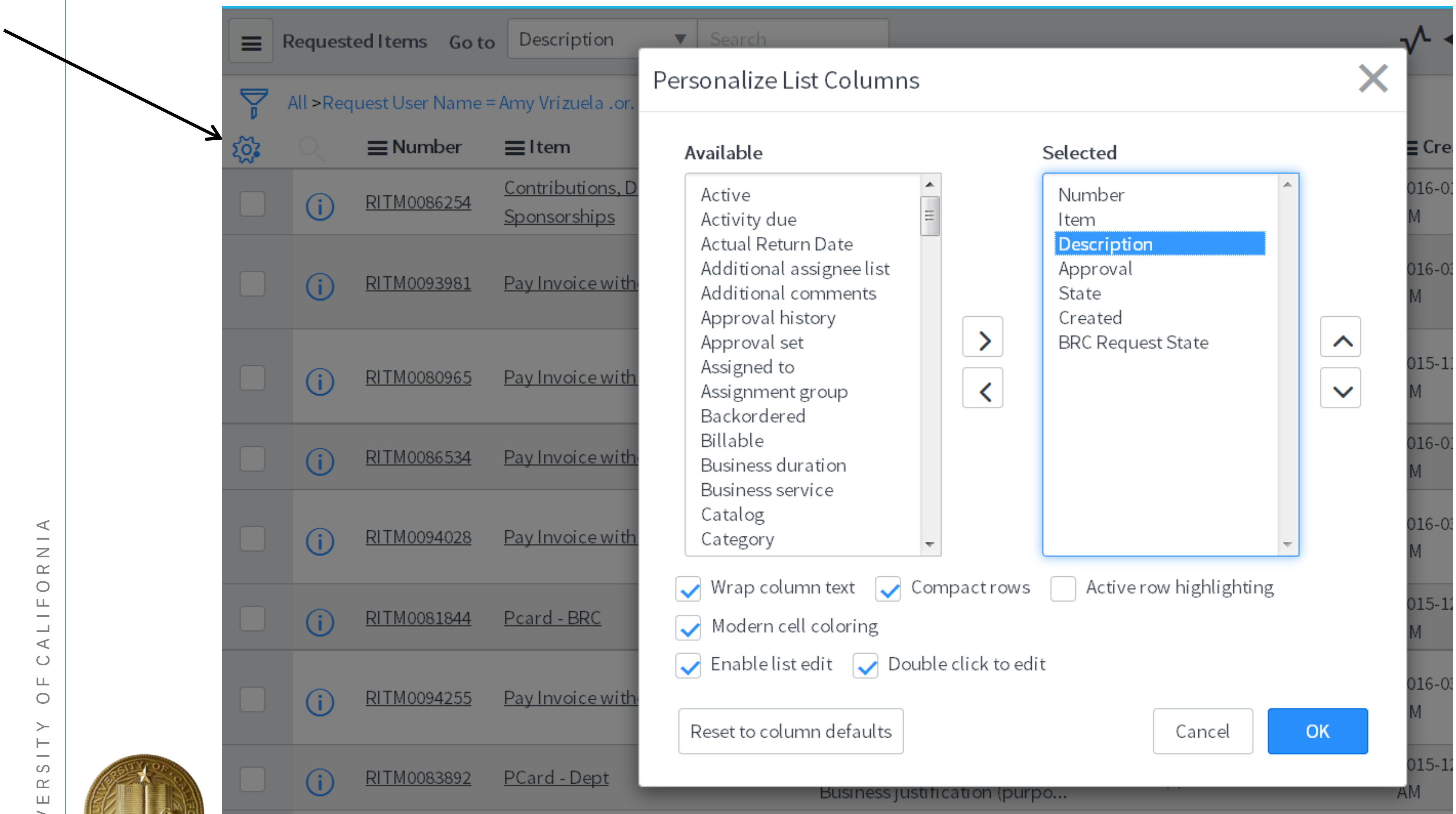
Requested Items Go to Description ▼ Search

All > Request User Name = Amy Vrizuela .or. Requested By = Amy Vrizuela

Number	Item	Description	Approval	State
RITM0086254	Contributions, Donations, & Sponsorships	Details: Business justification (purp...	Approved	Closed
RITM0093981	Pay Invoice without PO	Details: Invoice amount = 87.31 Busin...	Approved	Closed
RITM0080965	Pay Invoice with PO	Details: Vendor Name = Ricoh Busine...	Approved	Closed

How do I use it?

Status/Searching Requests



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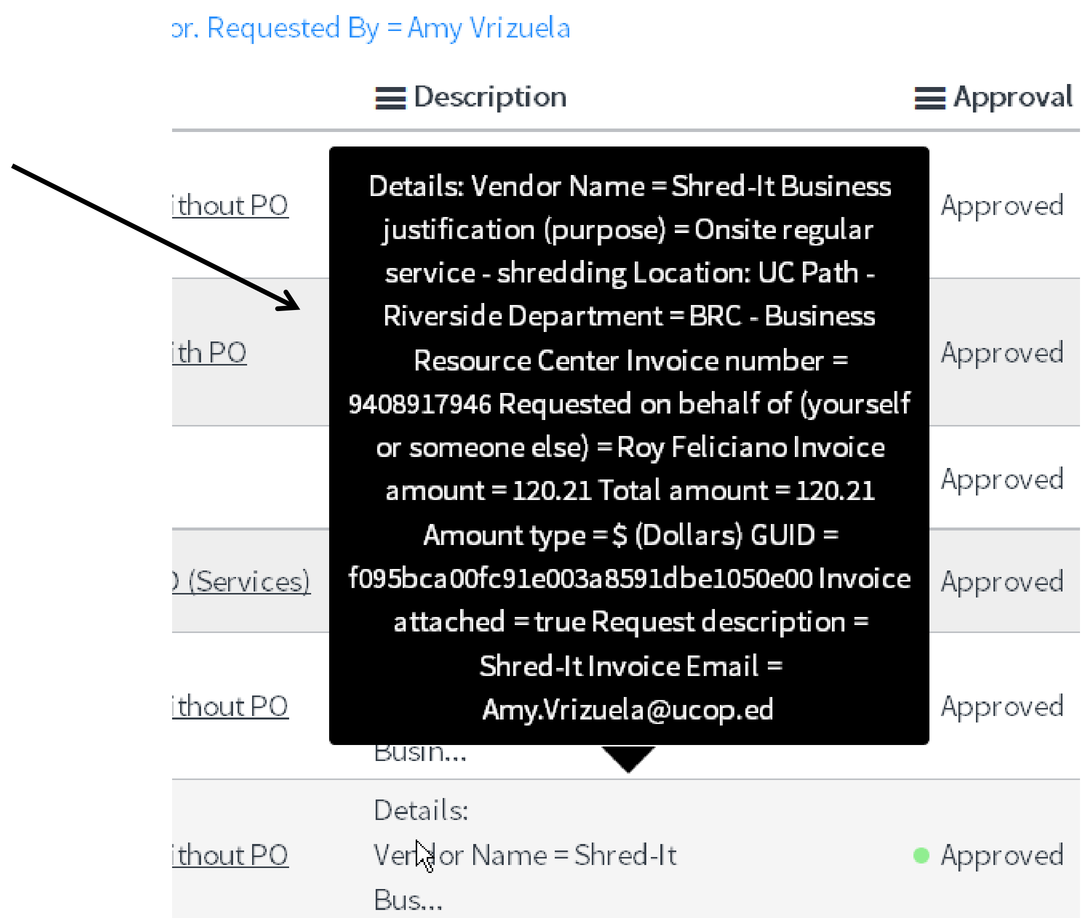
How do I use it?

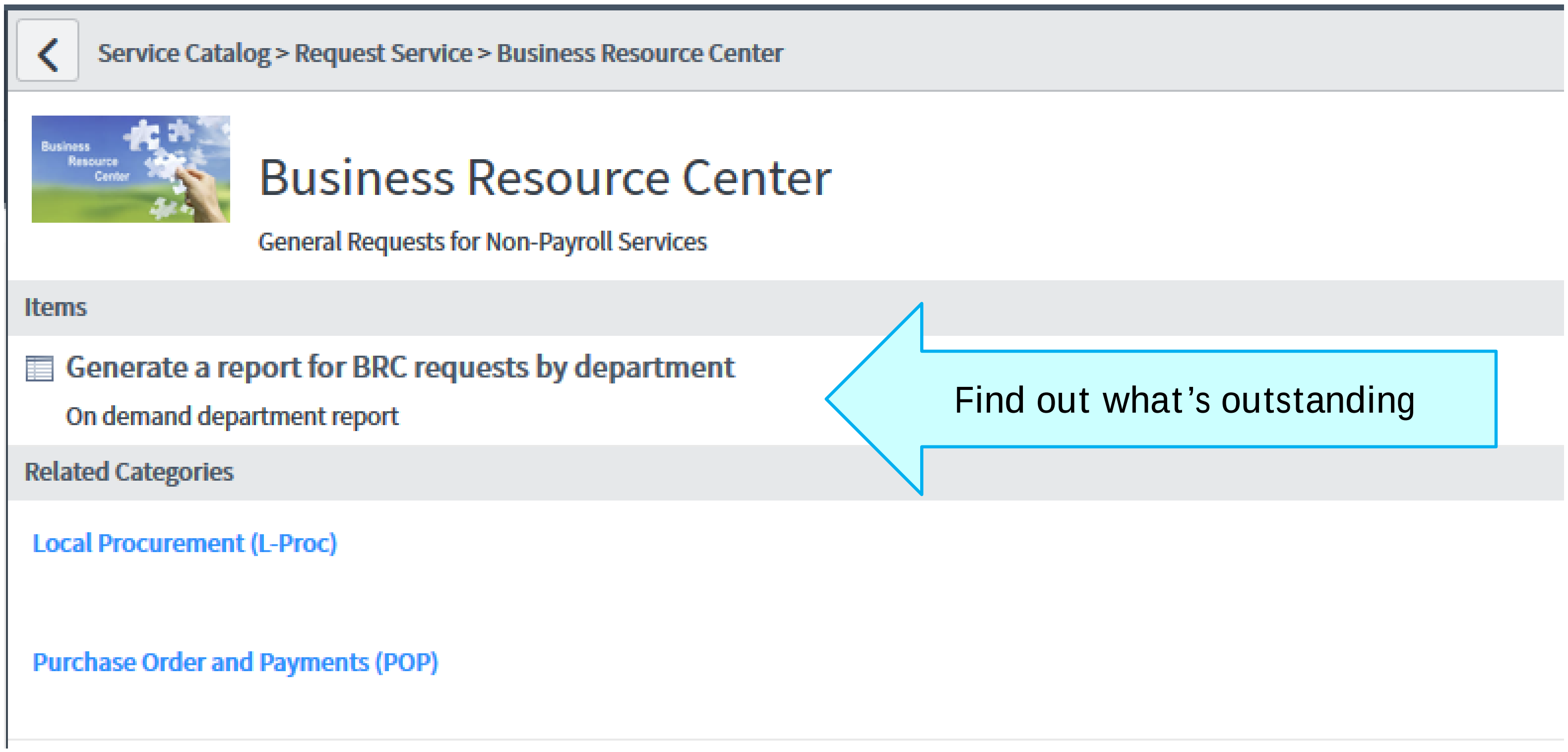
Status/Searching Requests



The description field allows you to search all of the information you entered into your original request, such as vendor name, request description or anything in the business justification field, etc.

How do I use it?

Status/Searching Requests



Find out what’s outstanding

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How do I use it?

Status/Searching Requests

On demand department report

Enter the department code and submit this request. An email with a report attached in excel format will be sent to the requestor in few minutes.

* Report requested by

Amy Vrizuela

* Department code

8135

Department name

BUSINESS RESOURCE CENTER

- Enter your name
- Enter your department code
- Click submit

Submit

How do I use it?

Status/Searching Requests

On demand department report

Enter the department code and submit this request. An email with a report attached in excel format will be sent to the requestor in few minutes.

* Report requested by

Amy Vrizuela

* Department code

8135

Department name

BUSINESS RESOURCE CENTER

- Enter your name
- Enter your department code
- Click submit

Submit

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How do I use it?

Status/Searching Requests

IT Service Hub <ucop@service-now.com>   Amy Vrizuela; Brad Niess

Active BRC requests for department - 8135 (BUSINESS RESOURCE CENTER)

Retention Policy   UCOP E-Mail Management Policy – Inbox (1 year)

Active BRC requests for department.xls
7 KB

Attached is a spreadsheet of active BRC requests.

Ref:MSG3127973

You will receive the report via e mail in excel format.

How do I use it?

Status/Searching Requests

Number	Created	Amount	Item	Request	Subject	Description	BRC Request State	User Name	Requested by
RITM0164908	2017-08-29 03:22:39 PM	100	Pay Invoice with PO	REQ0158453	Pay Invoice with PO	Details: Name = Brad Niess Email = Brad.Niess@ucop.edu Phone = (510)987-9913 Department = Business Resource Center Requested on behalf of (yourself or		Brad Niess	Brad Niess
RITM0127890	2016-11-19 06:33:08 PM	49.5	Office Supply Order	REQ0123083	Office Supply Order	Details: Enter estimated amount = 1000 Business justification (purpose) = OfficeMax test if list is working. Try selecting attach, then list. Department = BRC - Business Resource Center Requested on behalf of (yourself or someone else) = Lorrelie Esteban	BRC Action	Lorrelie Esteban	Lorrelie Esteban
RITM0127889	2016-11-19 06:26:44 PM	1103.87	Office Supply Order	REQ0123082	Office Supply Order	Details: Business justification (purpose) = to test to see if the items listed on the form shows, or works. Department = BRC - Business Resource Center Requested on behalf of (yourself or someone else) = Lorrelie Esteban Total amount = 1103.87 Amount type = % (Percentage) Request description = Office supply list	BRC Action	Lorrelie Esteban	Lorrelie Esteban

You will see all, open requests submitted within your department code, not just those you submitted yourself.

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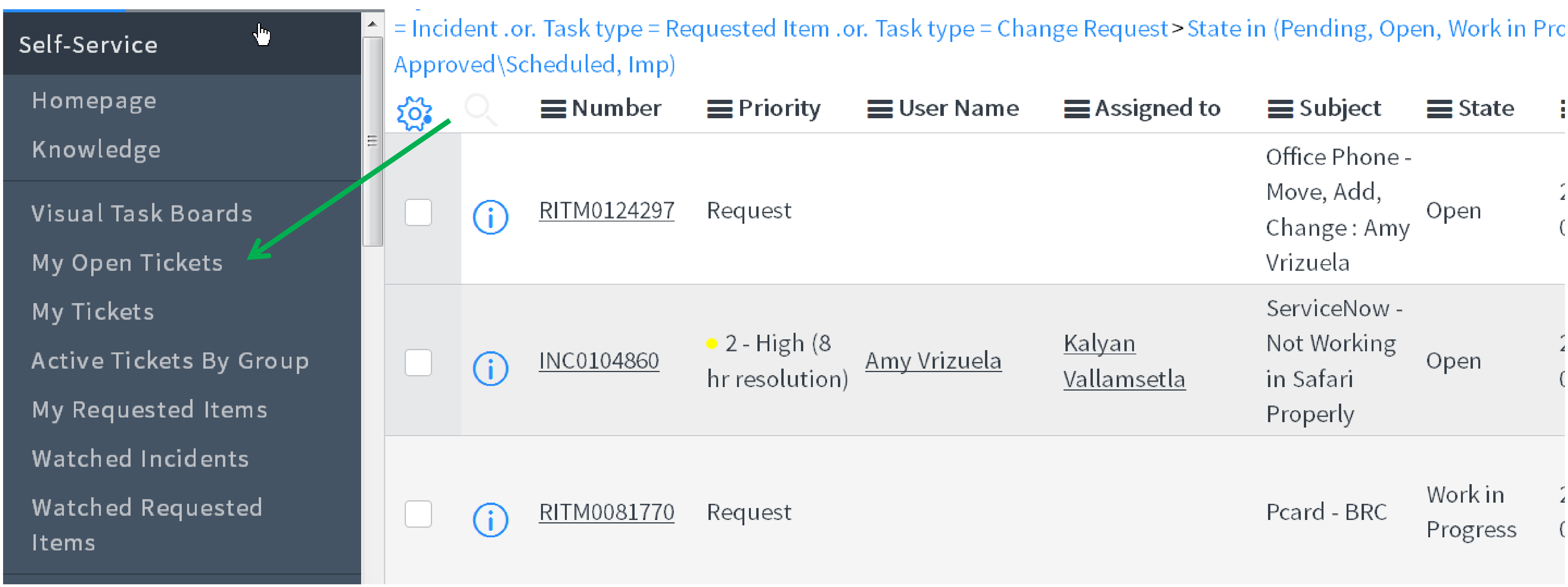
How to Use the Watch List In ServiceNow

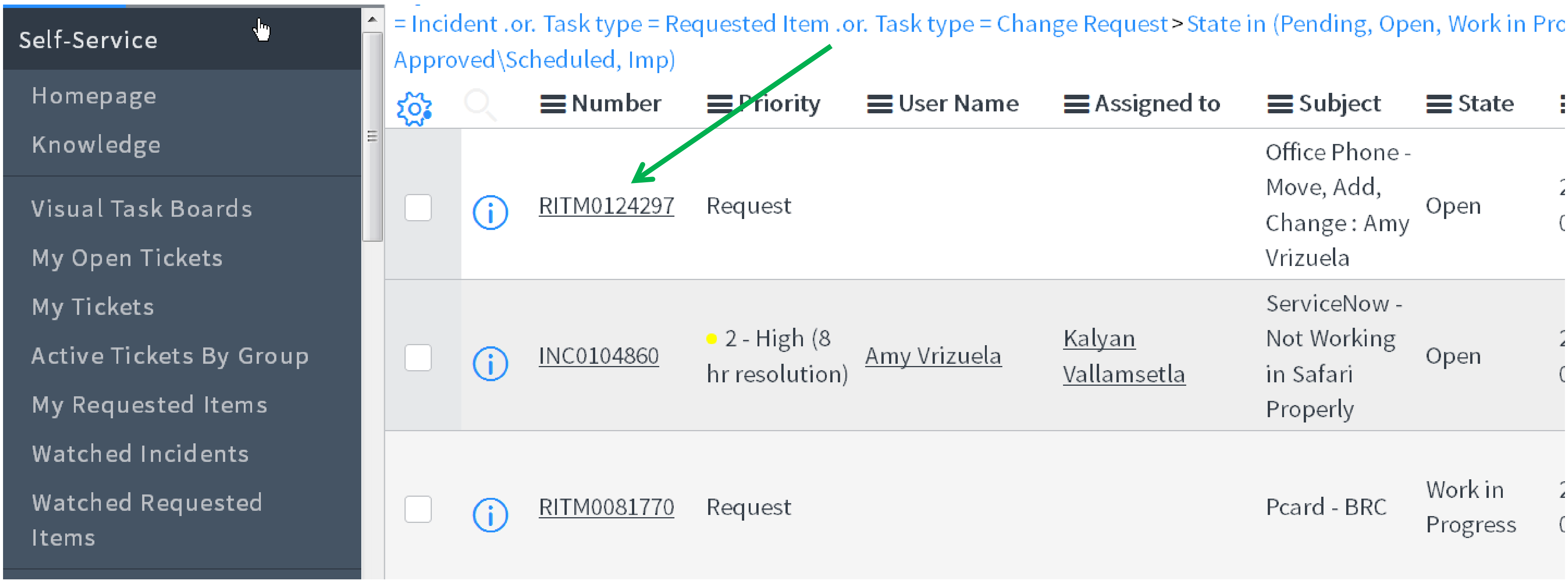
This feature allows others to see your requests in ServiceNow

Click on My Open Tickets to view current requests.



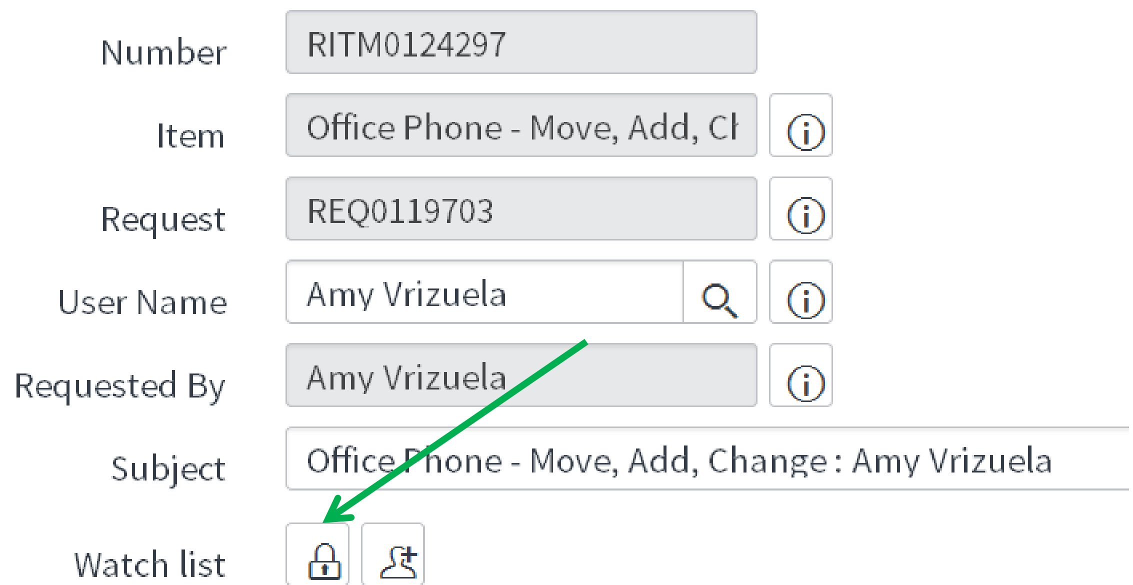
How to Use the Watch List - Continued

Click on the RITM number for the request you would like to share



How to Use the Watch List - Continued

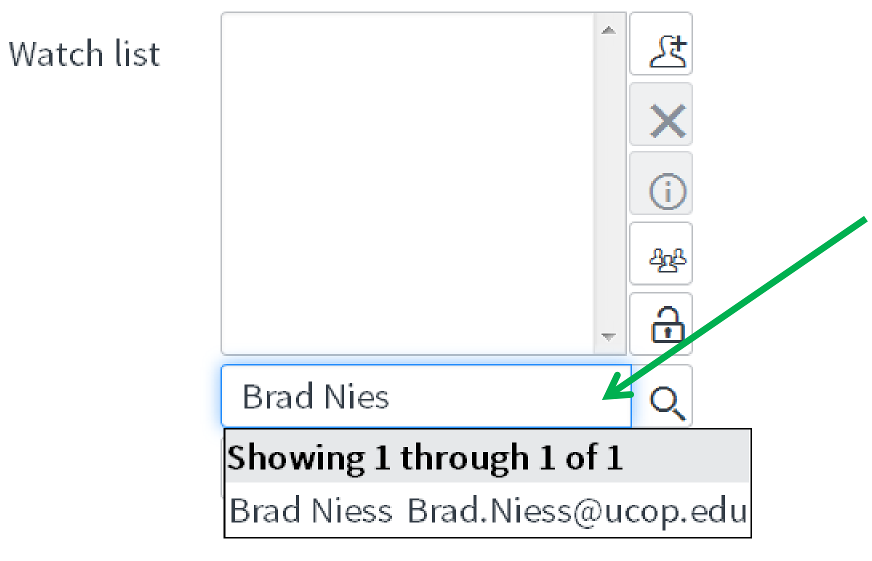
Click on the lock button to “unlock” the request and share it with anyone at UCOP

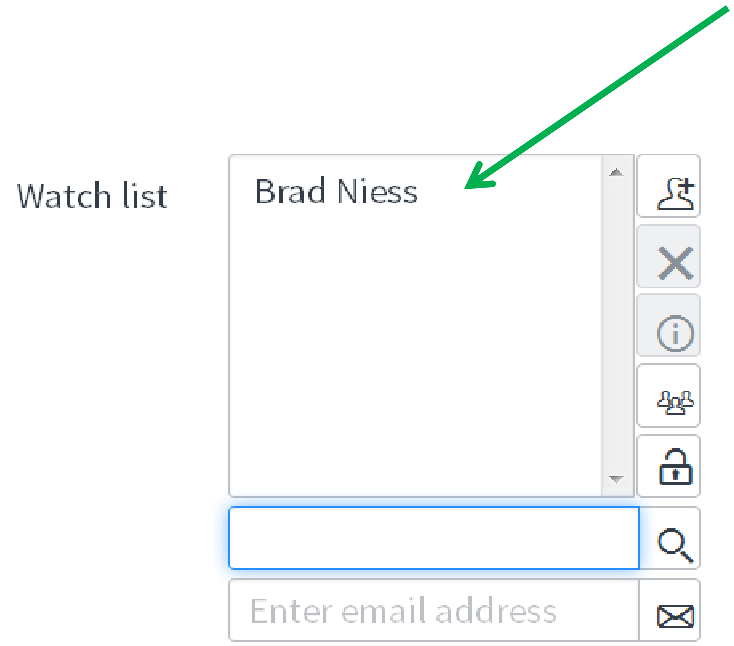


How to Use the Watch List – Continued

Type the name of the person you want to add into the search screen and select it when it appears.

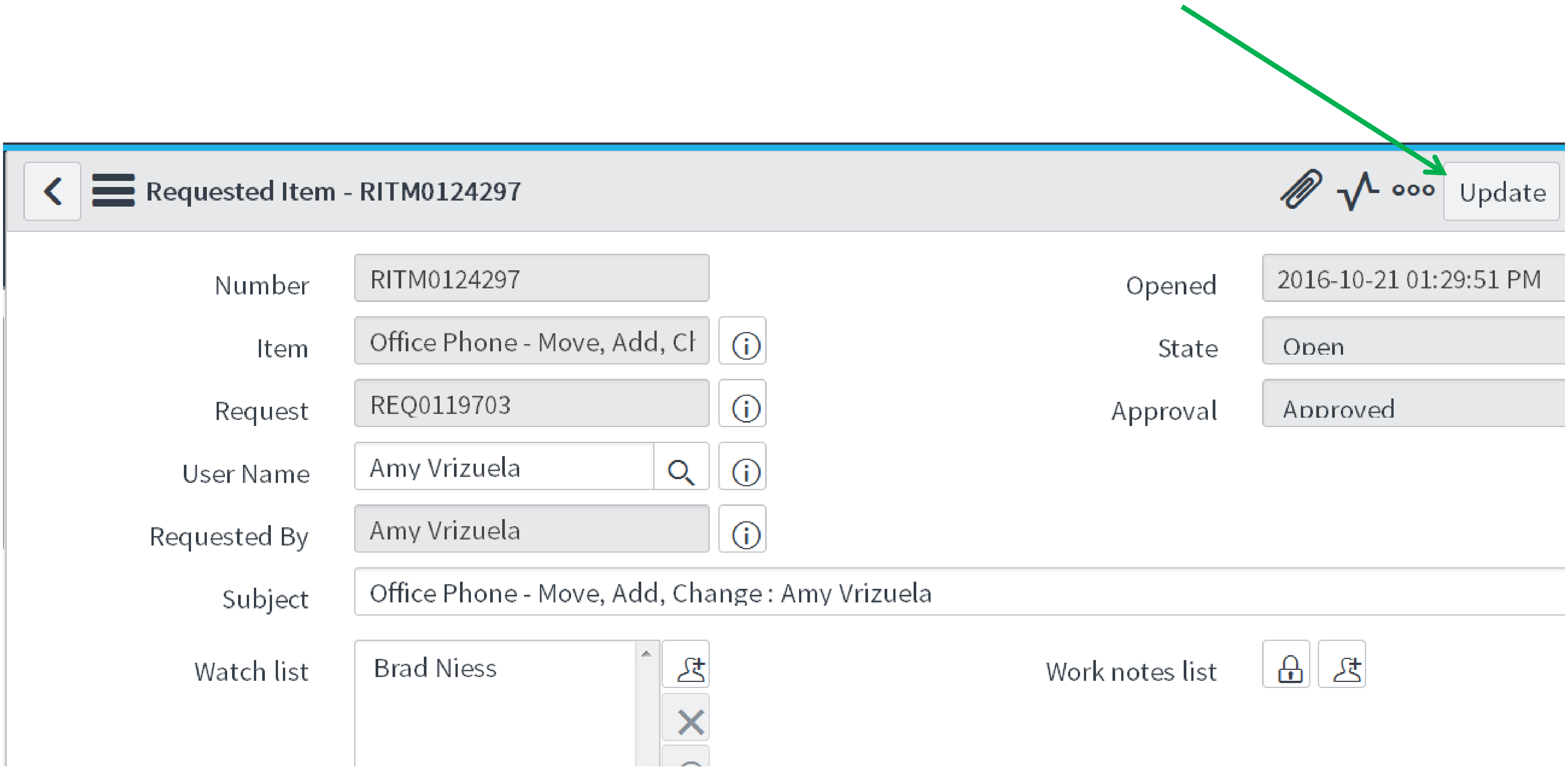
You can repeat this process to add multiple people to the watch list.





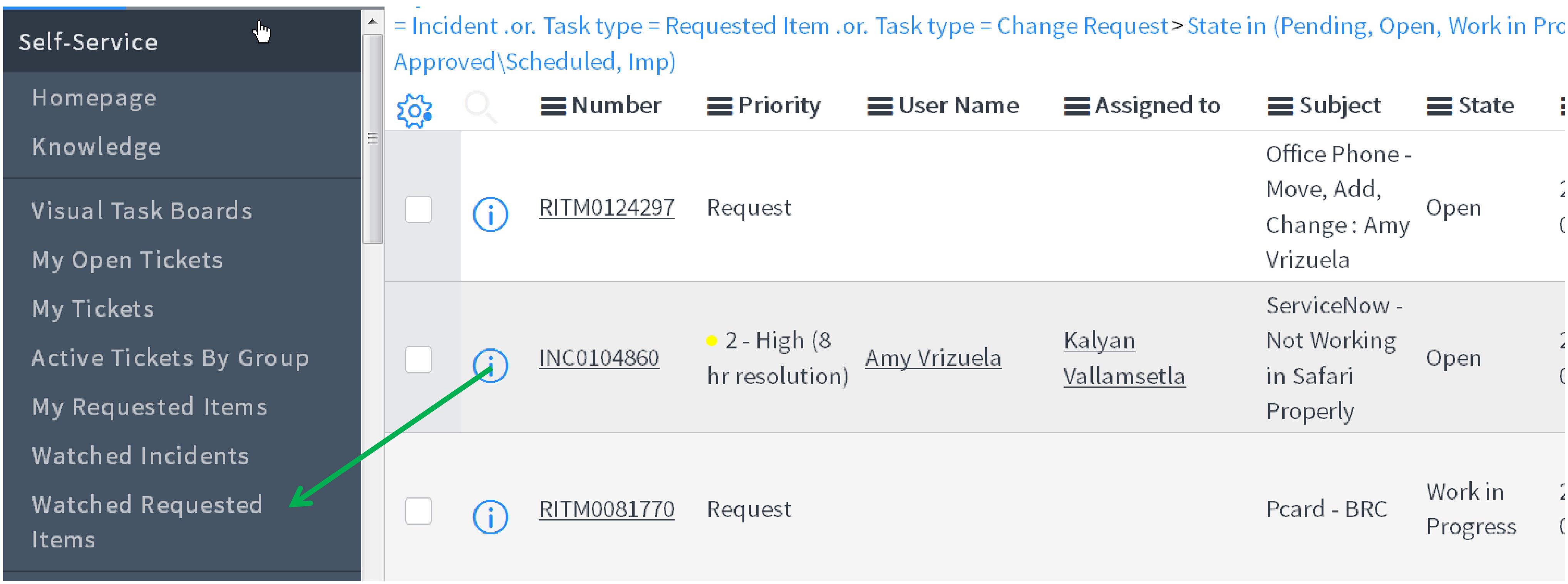
How to Use the Watch List - Continued

Once you’ve added the name/s to the watch list, click “Update” to save the changes.



How to Use the Watch List - Continued

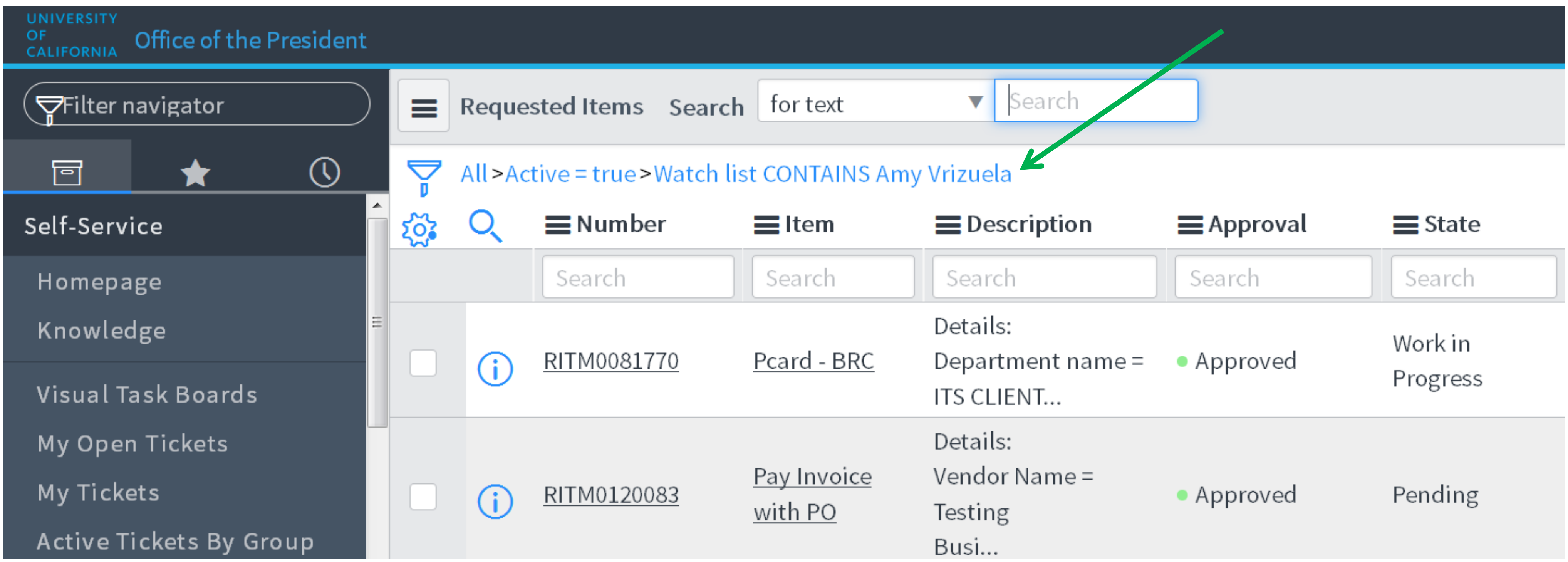
To view Watch List items, click on the *Watched Requested Items* menu item



How to Use the Watch List - Continued

Your watch list contains the requests you have been added to view.

Click on the RITM number to view the individual request details.



ServiceNow

You are ready to use ServiceNow!!

- Need Assistance?
  - ✓ Contact any member of the BRC! We are all knowledgeable on how to submit items through ServiceNow!!