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Service Catalog and Request Management Process Guide

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Table of Contents

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Introduction

This process guide will provide a detailed explanation on how the service catalog and request management process is enabled within the ServiceNow platform. It is intended that this process be followed as closely as possible regardless of the level of maturity of the customer. ServiceNow encourages simple, lean ITSM processes and that is reflected in the out of the box design.

In this guide, you'll find additional recommendations from ServiceNow Professional Services beyond the specific out-of-the-box (OOTB) functionality. You may add additional functionality to what's offered, but you should only do so in scenarios when you will achieve a required business outcome that can't be achieved using an OOTB method. When you follow this approach, your upgrade paths will be smoother, and you'll be better able to expand your use of the Now Platform®.

For an explanation of OOTB functionality please see https://docs.servicenow.com/

Principals and Basic Concepts

Service Catalog

The Service Catalog is a database listing all IT services offered to the business. It allows users to browse or search the offerings and request them in the same manner as an online shopping experience.

The Service Catalog includes a Shopping Cart where users can create a bucket of all the items they wish to request before they submit the request by 'Checking Out'.

Request Management

Request Management is the process that immediately follows the submission of a request from the Service Catalog. It includes the approval of the overall request and/or individual requested items and the subsequent fulfilment of those.

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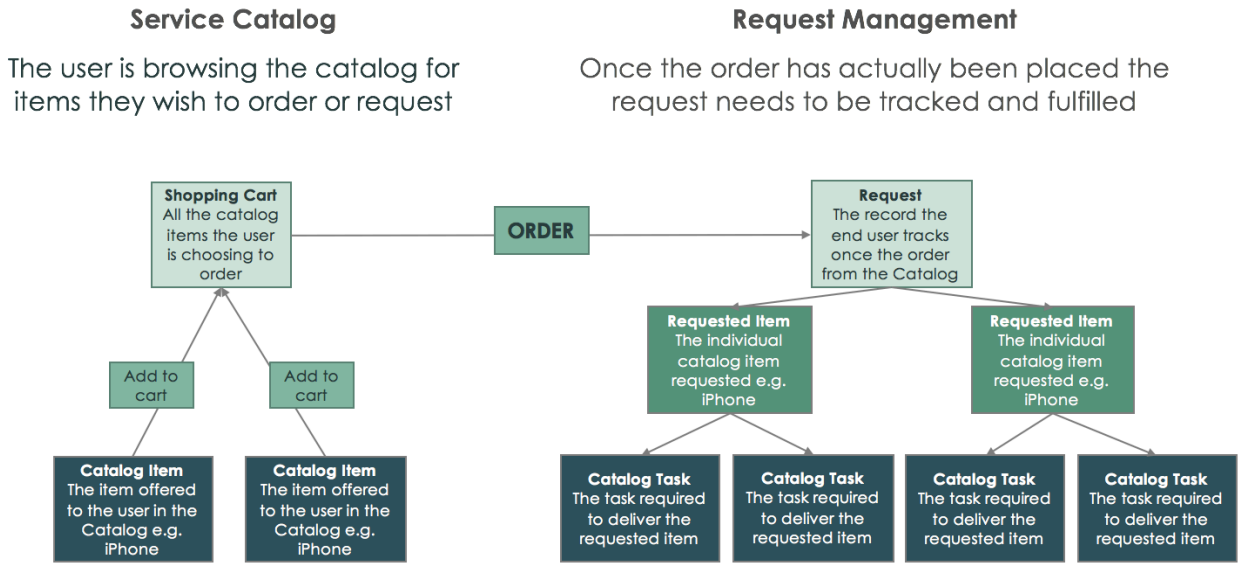

Process Scope

The scope of Service Catalog Management includes:

- The creation of the catalog and taxonomy
- Maintenance of the service catalog
- Creation of individual offered services and the fulfilment mechanism for each
- Modifying and retiring existing services

The scope of Request Management includes:

- Approval of overall requests such as by a line manager or financial controller
- Approval of individual requested items such as by an IT hardware provisioning team
- The fulfilment of all requests within the agreed delivery timeframe

Process Objectives

The objectives of Service Catalog and Request Management are to:

- Ensure all users in the organization are made aware of and can easily request all services offered by IT
- Provide a consistent and repeatable process for requesting and fulfilling services to ensure that users expectations are clearly set and continually met maintaining high customer satisfaction levels
- Ensure that all new services can quickly be offered in the catalog as soon as they become available

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Roles and Responsibilities

Process Owner

The Process Owner's objective is to own and maintain the Service Catalog and Request Management process. The Process Owner is typically a senior manager with the ability and authority to ensure the process is implemented and followed by all stakeholders.

Responsible for:

- Defining the overall mission of the process
- Establishing and communicating the process mission, goals, and objectives to all stakeholders
- Documenting and maintaining the process and procedures
- Resolving any cross-functional (departmental) issues
- Ensuring proper staffing and training for execution
- Directing the Service Catalog and Request Management roles
- Ensuring consistent execution of the process across the organization
- Monitoring, measuring, and reporting on the effectiveness of the process to senior management
- Continually improving the process

ServiceNow Role: There is no role in ServiceNow it is a functional role to support the process.

Catalog Manager

The Catalog Manager's purpose is to ensure changes to the service catalog are controlled and to enable efficient resolution of service catalog issues.

Responsible for:

- Managing the day-to-day activities of the process; ensuring operating procedures are documented to support the activities
- Assigning tasks to Catalog Editors for execution
- Coordinating interfaces between service catalog management and other processes
- Ensuring that all operational services (and those being prepared) are recorded within the service catalog
- Ensuring that appropriate views of the service catalog are maintained and made available to those for whom they are targeted

ServiceNow Role: catalog_manager

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Catalog Editor

The Catalog Editor is involved in the addition, modification, and retirement of catalog items based on approvals from the Service Owner and Catalog Manager.

Responsible for:

- Creation of new catalog items and associated workflows
- Modification of existing catalog items
- Retiring obsolete catalog items

ServiceNow Role: Both catalog_admin and catalog_editor roles are required

Service Owner

Each service must have a designated owner. The service owner is accountable for the delivery of a specific IT service and is responsible to the customer for the initiation, transition, and ongoing maintenance and support of that service.

Responsible for:

- Creating the service delivery method including the engagement and coordination of the teams responsible for fulfillment
- Ensuring the service is being delivered within the expected timeframe and cost allocated to it
- Approving requests against the service

ServiceNow Role: itil

Requester

The person making the request. Requesters may be anyone in the organization. Requesters may submit service requests on behalf of others.

ServiceNow Role: No role is required in ServiceNow for this however a login will be needed

Approver

Line managers, Service Owners and business stakeholders (e.g. financial management) responsible for reviewing request details and granting approval or rejecting the request. The actual number and type of approvals required depends on the individual request.

ServiceNow Role: approver_user

Fulfiller

The individual assigned to execute a specific task(s) to fulfill the service request.

Responsible for:

- Actioning the activities in their assigned tasks
- Updating the task to reflect the current progress and providing detailed information to allow a Service Desk Agent to give the Requester an update on progress if required

- Closing the task when completed with closure information

ServiceNow Role: itil

How requests are initiated

Directly in ServiceNow - The Service Desk Agent can create the request, on behalf of the user, directly as a result of a phone call, email or chat from a user.

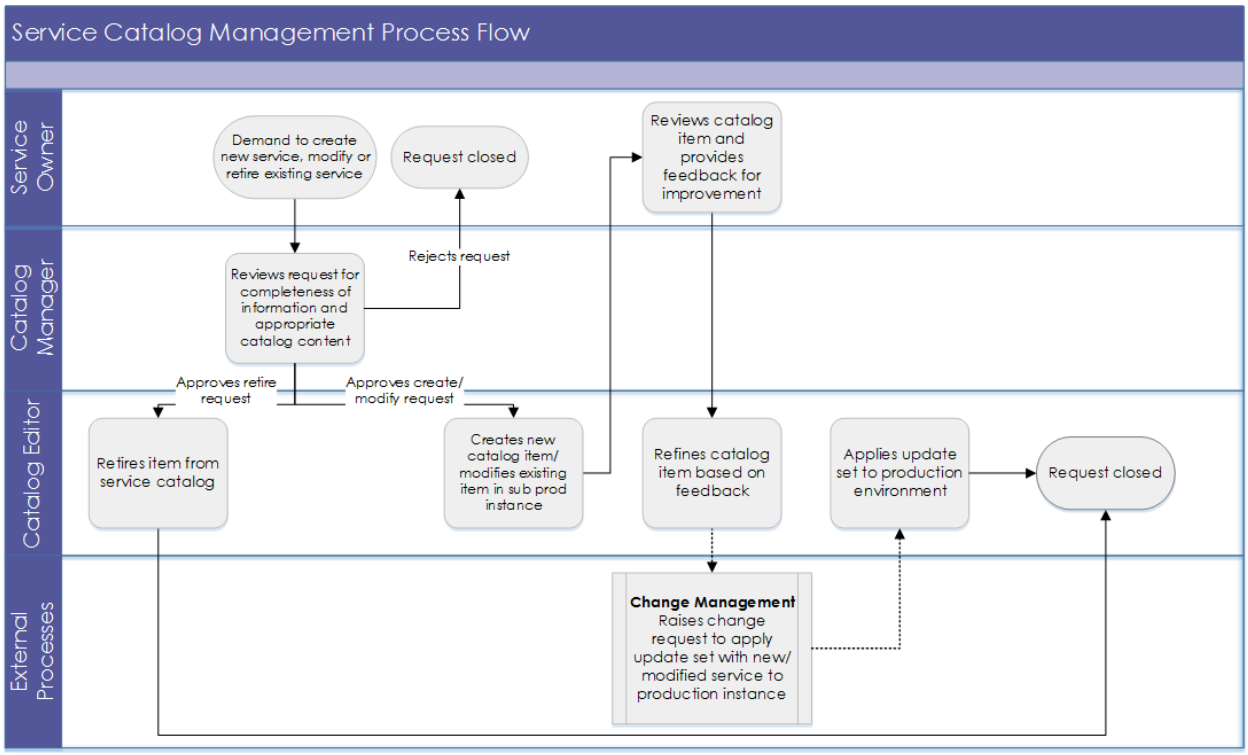
Self Service - End users are able to make use of the Self-Service portal where they can directly create a Request.

Automatically via Integrations – Certain requests can be automatically generated via the Virtual Agent chatbot from Slack or Microsoft Teams

Virtual Agent - A request can be created directly from a chat conversation

Walk Up Experience – A request can be created using the Walk-Up interface when a user visits the onsite IT Support location

Service Catalog Management Process



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Requesting and Approving New Services

When a new service is due to go live it must be added to the Service Catalog in preparation of this. It is best to create a Catalog Item in the Service Catalog for the express purpose of allowing Service Owners to request a new item be added to the Catalog. A Catalog Item to request a Catalog Item. Users will need to provide details of what service is being offered, who is allowed to request it, what information must be collected from the requester in order to fulfil the request, delivery timescales, who should approve the request, what tasks are required to fulfil the request, whether they must occur in a particular sequence and which team should complete the tasks.

Once the request has been submitted it should be routed to the Catalog Manager for review and approval. For very complex services it may not be possible to document every part of the requirement within the request itself and therefore the Catalog Manager may need to discuss the service in greater detail with the Service Owner.

Once the Catalog Manager is comfortable that the Service is well understood and is appropriate to include in the catalog they can approve the request. At this point a task for fulfillment of the request should be assigned to a Catalog Editor.

Create and Publish New Services

The Catalog Editor can now go ahead and create the catalog item. In the majority of cases this ought to occur within a sub production instance to ensure it can be fully tested before being made available in the live catalog.

The item should be created with the required variables, approvals and catalog tasks. The item should be included in the most appropriate category and sub category structure within the catalog.

Once the item is created the Catalog Editor requires that the new service be fully tested by the Service Owner to ensure that it behaves exactly as required and is acceptable to be made available in the live catalog. The editor should make any adjustments at this point based on feedback from the Service Owner.

Once both are happy with the new service the Catalog Editor can go ahead and publish the new service in the production service catalog.

Modify and Retire Services

Service Owners should also raise a request when they need to make a modification to their existing service or to retire it. The process is very similar to requesting a new service. Instead of creating a new item the Catalog Editor will make modifications to the existing item in a sub production instance, unless it is a small change that will not impact the workflow such as changing the category the item is in. Once the changes are made the item is tested by the Service Owner and published to the production instance.

If the item is being retired this can be done in the production instance immediately by the Catalog Editor.

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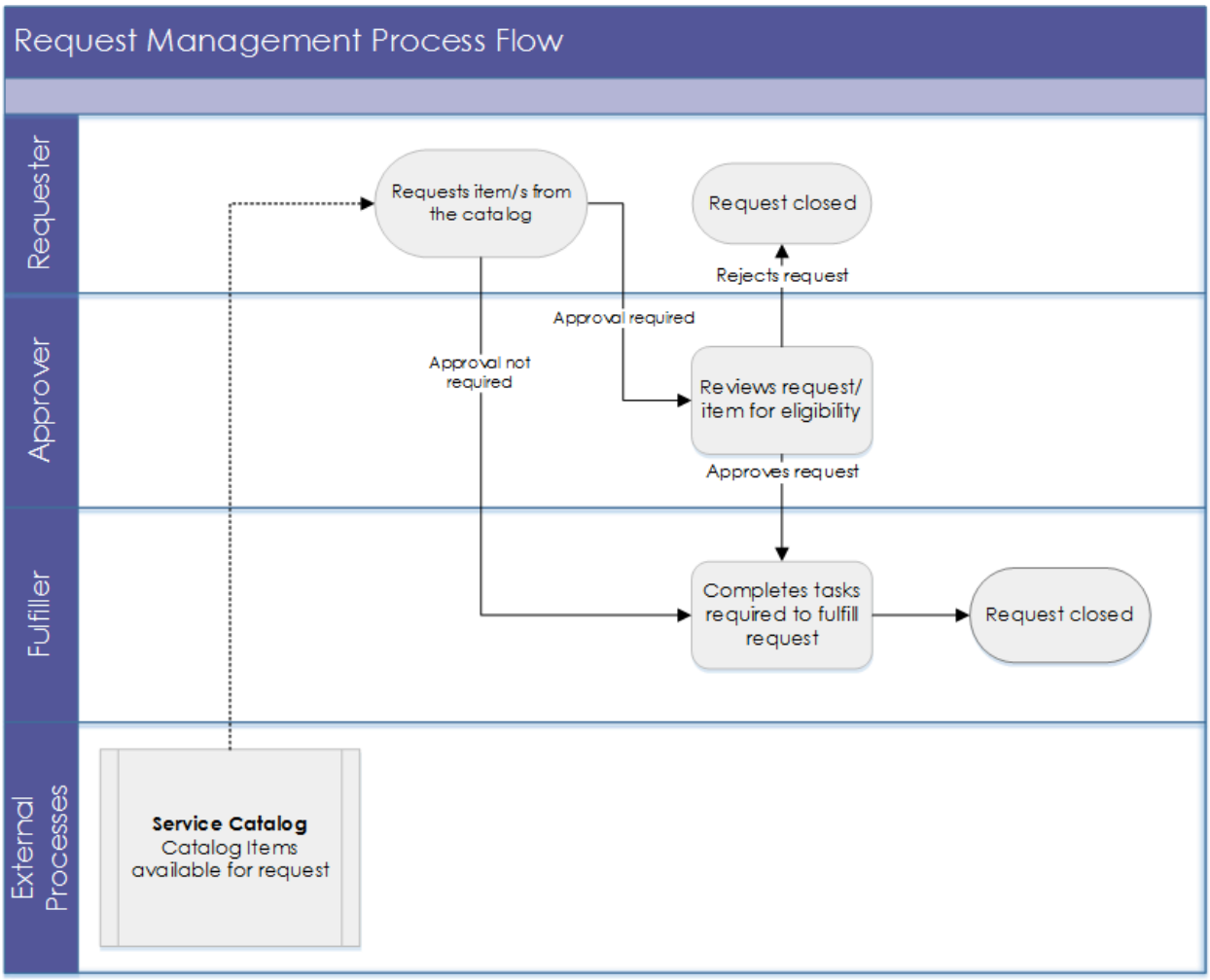
Request Management Process



Requesting Services

The Requester should search or browse for the service they require within the catalog. They will complete any required questions against the individual item. If that is the only item being requested the Order Now button should be used and this will take the requester through the checkout process immediately. If other items are to be requested at the same time the Add to Cart button should be used to hold that item in the cart and allow the requester to continue browsing and requesting other items.

Once all required items are added to the cart the requester can checkout by clicking the Proceed to Checkout button. Using the 2-step checkout process will provide the opportunity to enter some additional overall information to the request such as a shipping address or any special instructions. The requester also has the opportunity to edit the cart here if they wish to remove anything. Once they are ready to submit they will click the Checkout button and this is the point at which a new request is created.

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Approving Requests

The next stage of the process will be to seek any required approvals. Typically those held at the Request record level will be generated first such a line manager who is approving the overall request. Once these approvals have been received then approvals attached to the individual items can be requested such as IT procurement approval for a particular hardware item. Once all outstanding approvals are received the request can be fulfilled. If the request or requested item is rejected by any of the approvers, it is marked as Closed Rejected and the process ends after sending a notification to the Requester.

Fulfilling Requests

At this point catalog task records are created. There may be several of these per requested item and they may occur sequentially or in parallel. Catalog tasks are used to carry out the fulfilment of the requested item by being assigned to specific groups to undertake certain activities such as deploying software or delivering hardware to the requester. The Assigned to individual should change the State field to In Progress to make it clear that work has begun on the task. Once they have completed the work they should set the State to Closed Complete unless the task could not be completed. In these cases they should select either Closed Skipped or Closed Incomplete. Once all tasks for the requested item are closed the item itself will be closed automatically. Once all items are closed the overall request can be closed and the requester is notified of this. At this point the process is complete.

Tracking Requests

During the lifecycle of the Request Management process there may be multiple groups and individuals involved with the fulfilment of the request. In order to provide a single point of contact for the requester the Service Desk is considered the owner of all requests regardless of who is actually responsible for fulfilling them.

Although there is an overall request record to track all requested items most requesters will prefer to track progress against the individual requested item records since in many cases these can be fulfilled independently of each other.

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Other Processes

Incident Management

It is extremely common for end users to be offered the opportunity to raise incidents themselves using a self-service portal. In this case a record producer is used which allows an interface to be presented to the user that looks the same as a catalog item and therefore can be stored within the catalog as just another offered service. Once submitted the record producer will not raise a request with items and tasks as with other catalog items. Instead it will immediately generate a new incident record that will follow the normal incident process.

Many service requests may come in via the Service Desk and may be initially handled through the Incident Management process before being identified as a service request.

Change Management

Standard changes are stored as templates within the Service Catalog. These templates are used to create new standard changes with pre-populated content.

It is not recommended that users be allowed to directly create new changes from the catalog outside of the Standard Change Catalog. This is due to the large amount of technical information that is required to raise a change. Instead users should raise a request to the team responsible for implementing the change and that team should subsequently raise a change record for the work.

Configuration and Asset Management

Information about attributes of assets and configuration items may be used in various catalog items that initiate service requests. Updates to certain asset and configuration item attributes (for example, software license counts) may be triggered from a service request.

Service Level Management

Service Level Management defines the fulfilment targets for the various types of service requests.

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Process Governance

Measurement

Key Performance Indicators (KPIs) evaluate the success of a particular activity toward meeting the critical success factors. Successfully managing KPIs can be either through repeatedly meeting an objective (maintain) or by making progress toward an objective (increase/decrease). The Benchmarks feature gives you instant visibility into your key performance indicators (KPIs) and trends, as well as comparative insight relative to industry averages of your peers. You can contrast the performance of your organization with recognized industry standards, and view a side-by-side comparison of performance with global benchmarks. Benchmark offers the following ITSM KPIs:

- % of closed requests with breached SLAs
- Average time to fulfil a request
- Number of requests created per user

Metrics

Process KPIs

- Provide information on the effectiveness of the process and the impact of continuous improvement efforts
- Are best represented as trend lines and tracked over time
- Monitored by the Process Owner

Item	Purpose
Number of new catalog items delivered into the live environment per month	Indicator of the accuracy of the service catalog and the growth of new services
Number and percentage of service requests completed within agreed target times	Measure how well service request SLAs are achieved.

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Operational Data

Active catalog items/requests that require visibility, oversight, and possible management intervention are best tracked on a dashboard or homepage that is monitored by the Service Desk and request fulfilment team.

Item	Purpose
List of generic requests that have been submitted	Periodic review and analysis of generic requests may reveal opportunities to improve the organization of the service catalog or identify new services and/or catalog items that should be added
Ageing of open service catalog item review	Provides a view of service catalog item review tasks that have not been completed on time
List of open requests that have exceeded target times	Provides quick view of open requests that have breached SLAs and need immediate attention
Pie chart of service request backlog by type	Provides quick view (with drill-down capability) of those fulfilment areas that need improvement
List of open requests that have exceeded target times	Provides quick view of open requests that have breached SLAs and need immediate attention

Reports and Dashboards

There are numerous default reports available in ServiceNow that can be used to generate charts, can be published to a URL, or can be scheduled to be run and distributed at regular intervals. Users can also create custom reports.

Process users will find it valuable to have access to dashboards that provide live information about records they are assigned to or have responsibility for. These dashboards help the user to understand how to prioritize work.