



Use Case:

Integration of HR and

SAM

UCN001_0006

September 2020

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1. Preparation

1.1. Outcome

Take command of your software assets.

Software can represent over 20% of IT budgets, and managing it is complicated. Dynamic environments and increasingly complex licensing schemes prohibit visibility into use and entitlement. Legacy point tools require fragile integrations that must be monitored, managed, and maintained. The result is an inefficient IT patchwork that ineffectively addresses the software visibility issue.

Take control of licenses by procuring, managing, and optimizing the software needed to align with the business using Software Asset Management (SAM). Embedding SAM natively into everyday IT management is a proven game changer. Get even more value out of existing Now Platform investments and intuitive workflows to modernize and simplify how work gets done

1.2. Characters

Name	User Role/ Personal	Login ID	Password
Admin	System Admin		
Casey Kuhn	Software Asset Manager		
Joe Employee	End User, Requestor		

1.3. Products and Platform Features

List each of the products and platform features highlighted in the narrative.

Name	Description	Documentation or Video	SKU
SAM-Pro	Microsoft True-Up SAM Dashboards		SAM-Pro

1.4. Steps before delivering a SAM demo

Before we get started, let's refresh the SAM compliance positions.

- Logon as **Casey Kuhn**.
- We've created a list of **Favorites** for Casey Kuhn.
- Click **SAM Demo Prep** from the Favorites.
- Click **Historical Results** from the Favorites.
- Confirm **Reconciliation Results** job is complete.

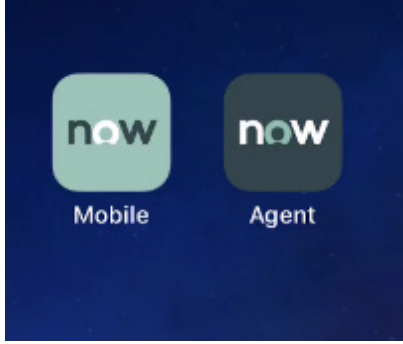
Number	Last reconciled	Plan for	Publishers	Group	Subgroup	Status	Progress
RR000007	2019-08-27 15:01:02	All Publishers	None	None	None	Completed	100%
RR000008	2019-08-27 15:51:20	All Publishers	None	None	None	Completed	100%
RR000003	2019-08-27 13:12:55	All Publishers	None	None	None	Completed	100%
RR000009	2019-08-28 08:48:41	All Publishers	None	None	None	Completed	100%
RR000002	2019-08-27 09:27:57	All Publishers	None	None	None	Completed	100%
RR000001	2019-08-27 04:21:51	All Publishers	None	None	None	Completed	100%
RR000005	2019-08-27 14:40:12	All Publishers	None	None	None	Completed	100%
RR000006	2019-08-27 14:41:04	All Publishers	None	None	None	Completed	100%
RR000004	2019-08-27 13:27:57	All Publishers	None	None	None	Completed	100%

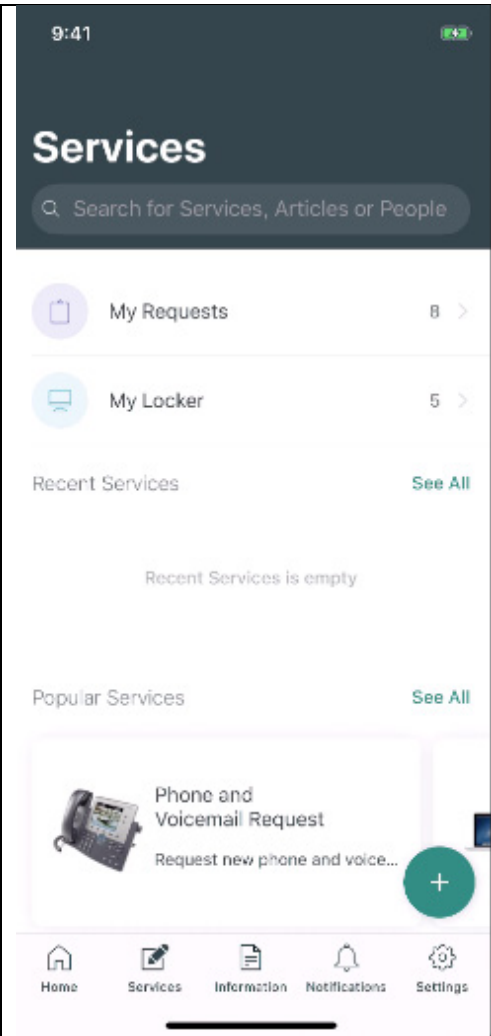
2. Use Case: Integration of HR and SAM

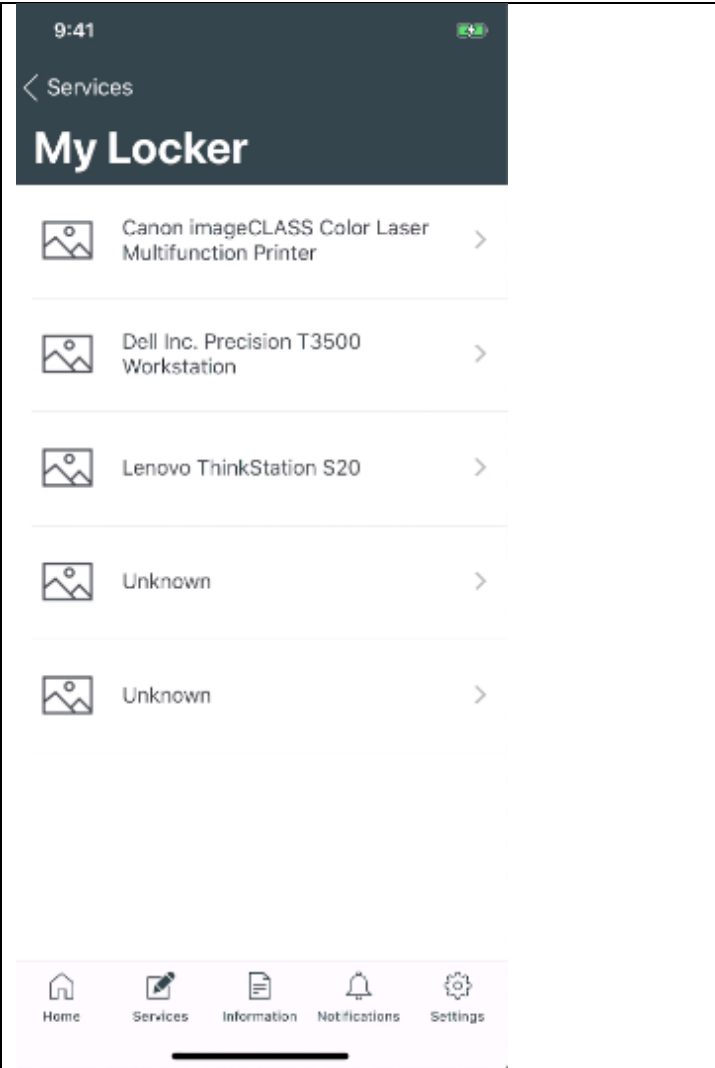
Use case description: ServiceNow HR onboarding workflows integrated with SAM is a powerful combo. We've also added mobile app that allows you to View Assets, Open Incidents, Receive Purchase Orders, Scan Bar Codes, Create Request and much more!

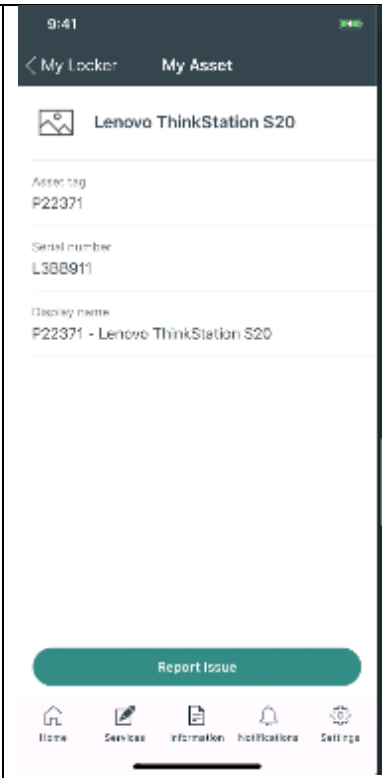
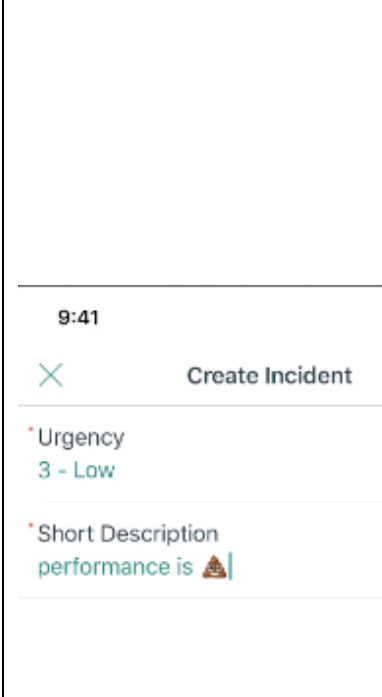
Persona: Casey Kuhn – SAM Admin

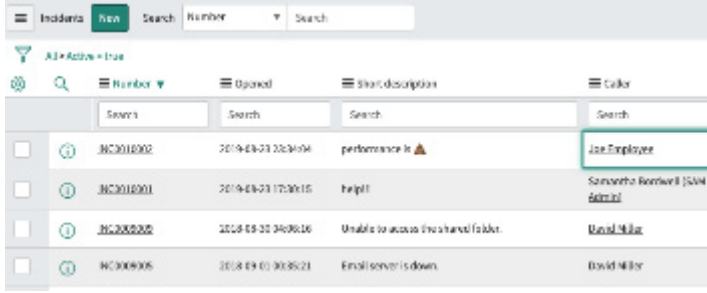
Demonstration Steps:

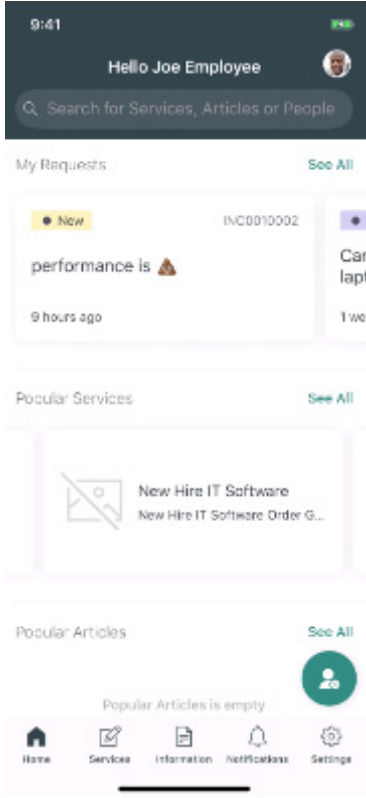

Topic	Narrative	Navigation Notes
<p>HR + SAM + Mobile</p>	<p>Mirror your iPhone to your MacBook using QuickTime.</p> <p>YouTube Instruction Video</p> <p>Download the below 2 apps from the App Store to your iPhone</p>  <p>Use Cases:</p> <p>View Assets and Open Incident – (Joe Employee on Now Mobile)</p> <p>Submit Catalog Request – (Joe Employee on Now Mobile)</p> <p>Approve Request, Create PO – (Casey Kuhn on web browser)</p> <p>Receive Purchase Order – (Casey Kuhn on Now Agent)</p>	<p>Go into the App Store on your iPhone</p> <p>Download the NOW Mobile app.</p> <p>Download the NOW Agent app.</p>

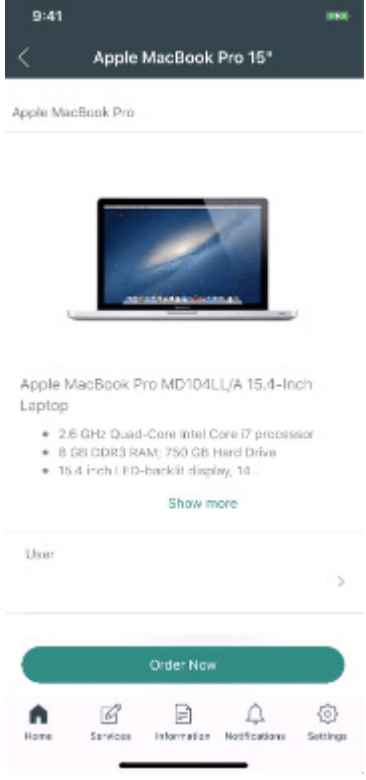
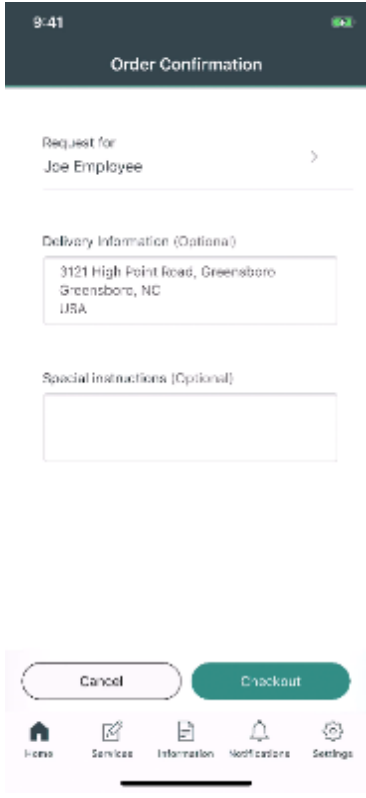
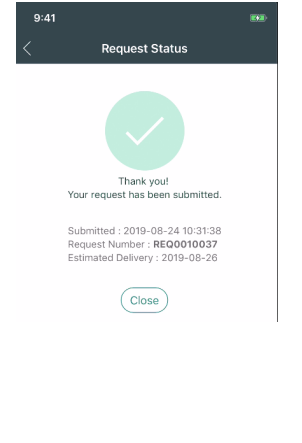
	 <div data-bbox="550 1279 1038 1863" style="border: 1px solid black; padding: 10px; margin-top: 20px;"> <p>Joe is your typical End User.</p> <p>In the Services screen we can go into My Request to view status of existing work items.</p> <p>Open My Locker to see all the assets assigned to Joe Employee.</p> </div>	<p>Logon to NOW Mobile as Joe Employee</p> <p>Logon = (employee)</p> <p>pw = (Sh0wc@se)</p> <p>Click on the Services item at the bottom of your screen</p>
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	 <div data-bbox="560 1328 1031 1686" style="border: 1px solid black; padding: 10px; margin-top: 20px;"> <p>Here we can see all of the assets assigned to Joe Employee.</p> <p>If Joe is having a problem with his computer, he can select the asset from his phone and open a ticket with just a few touches.</p> </div>	<p>Open My Locker</p> <p>Select the Lenovo ThinkStation S20</p>
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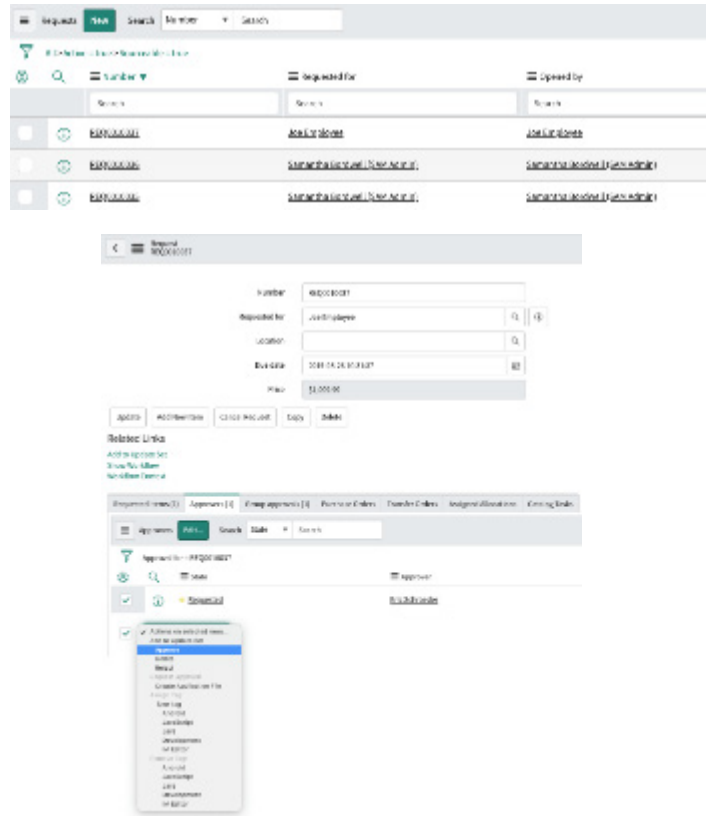
		<p>Joe has performance issues with his Lenovo laptop.</p> <p>Let's open an Incident.</p>	
			<p>Click on Report Issue</p>
	<p>The idea is for this to be quick and painless for the End User.</p> <p>The Help Desk Agent would take it from here.</p> <p>Logon as Casey Kuhn to see the newly created Incident in the web browser.</p>		<p>Update the Urgency and Short Description fields.</p> <p>Click on Submit to create the Incident.</p>

	 <p>The screenshot shows a web interface for incident management. At the top, there is a search bar with the text 'Incidents' and a filter set to 'All Active = true'. Below this is a table with columns for 'Number', 'Opened', 'Short description', and 'Caller'. The table contains four rows of incident data:</p> <table border="1"> <thead> <tr> <th>Number</th> <th>Opened</th> <th>Short description</th> <th>Caller</th> </tr> </thead> <tbody> <tr> <td>JNC2018002</td> <td>2018-08-23 22:34:04</td> <td>performance is</td> <td>Joe.Empolzer</td> </tr> <tr> <td>JNC2018001</td> <td>2018-08-23 17:30:15</td> <td>help!</td> <td>Suzanne Rothwell (SAR)</td> </tr> <tr> <td>JNC2000002</td> <td>2018-08-20 04:06:16</td> <td>Unable to access the shared folder.</td> <td>Manal.Millar</td> </tr> <tr> <td>JNC000005</td> <td>2018-08-01 00:35:21</td> <td>Email server is down.</td> <td>David Miller</td> </tr> </tbody> </table> <p>This completes View Asset and Create Incident from your iPhone.</p> <p>Let's move on to Create Request.</p>	Number	Opened	Short description	Caller	JNC2018002	2018-08-23 22:34:04	performance is	Joe.Empolzer	JNC2018001	2018-08-23 17:30:15	help!	Suzanne Rothwell (SAR)	JNC2000002	2018-08-20 04:06:16	Unable to access the shared folder.	Manal.Millar	JNC000005	2018-08-01 00:35:21	Email server is down.	David Miller	<p>Logon to web browser as ca-sey.kuhn</p> <p>Type Incidents in Filter Navigator</p> <p>Select Service Desk / Incidents</p>
Number	Opened	Short description	Caller																			
JNC2018002	2018-08-23 22:34:04	performance is	Joe.Empolzer																			
JNC2018001	2018-08-23 17:30:15	help!	Suzanne Rothwell (SAR)																			
JNC2000002	2018-08-20 04:06:16	Unable to access the shared folder.	Manal.Millar																			
JNC000005	2018-08-01 00:35:21	Email server is down.	David Miller																			

<p>HR + SAM + Mobile</p>	<p>Let's go back into NOW Mobile as Joe.</p> <p>This time, we'll stay on the Home screen.</p> <p>Notice we see our newly created Incident in the My Request section.</p>  <div data-bbox="911 544 1225 1541" style="border: 1px solid black; padding: 10px;"> <p>This is where Joe can request items from the Service Catalog.</p> <p>Notice we have a New Hire IT Software Order Guide catalog item.</p> <p><i>Example: A manager could go in and request this item as part of the onboarding workflow.</i></p> <p><i>The catalog can be role based, so an Engineer would see a different bundle of software than an Executive.</i></p> </div>	<p>Logon to NOW Mobile as</p> <p>Joe Employee</p> <p>Logon = (em- ployee)</p> <p>pw = (Sh0wc@se)</p> <p>Click on the Home item at the bottom of your screen</p> <p>Scroll through the Popular Services</p> <p>Find and select the Apple MacBook Pro 15' catalog item.</p>  <p>Scroll down to see the Price and review the details of the MacBook.</p>
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	 	<p>This looks like the Mac-Book we want.</p> <p>You can scroll down to see the Price and drill into Show more for additional details.</p> <p>Let's go ahead request the laptop and Order Now.</p>	<p>Select Order Now</p> <p>Fill out the Order Confirmation details</p>
<p>HR + SAM + Mobile</p>	<p>Casey Kuhn is our ITAM Manager. The next step in the workflow is to approve the Request.</p> <p>We see the Request below in a Pending Approval state.</p>	<p>Complete the Order Confirmation and Checkout.</p> <p>The Request has been created.</p> 	<p>Select Checkout</p> <p>Logon to the web instance as casey.kuhn</p>

Let's **Approve** the **Request**.



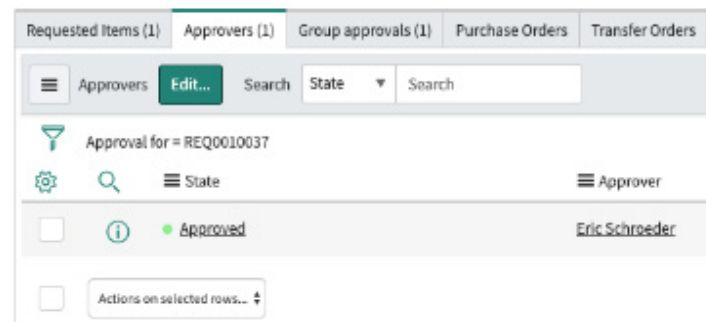
Go to **Procurement / Requests** in Filter Navigator

Open the **Request**.

Go to **Approvers** tab

Select **Approve** from the drop-down list

The Request has updated to **Approved**.



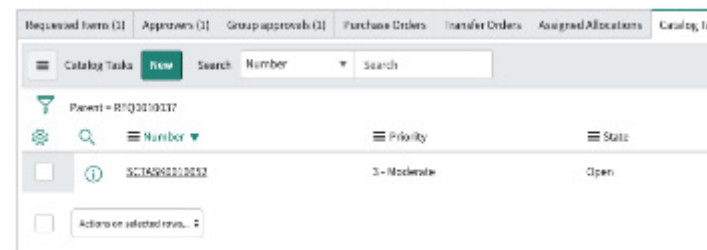
Click the **Catalog Tasks** tab

Open the **Catalog Task**

Click **Source Request**

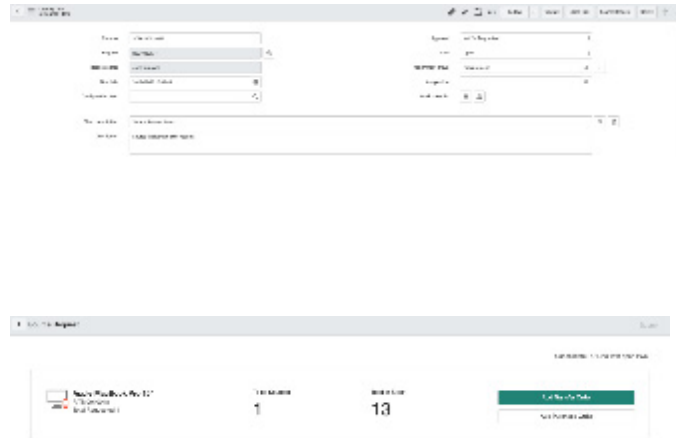
(top right button)

Notice we have a new **Catalog Task** moving us forward in the workflow.



Let's open up the **Task** and **Source Requested items**.

Click



We have 2 options.

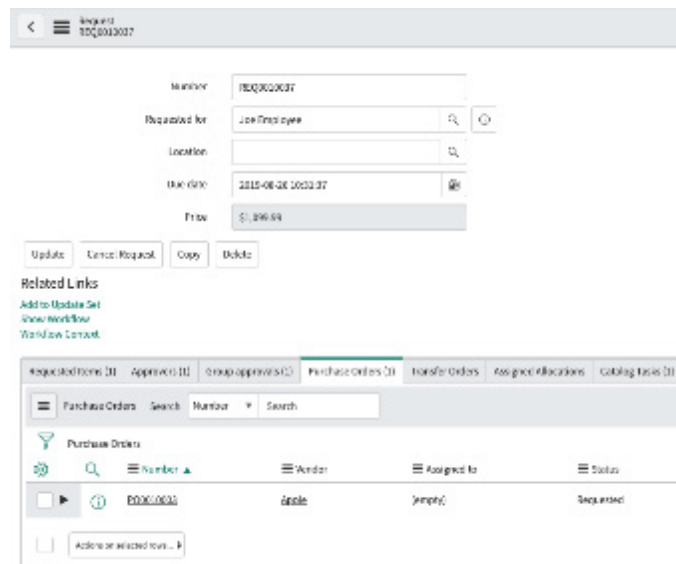
- Create a **Transfer Order** and fulfill from **In Stock**.
- We have 13 laptops In Stock.

Create a **Purchase Order** to buy a new laptop

For the demo let's create a Purchase Order and buy a new one!

We have now created a **Purchase Order**. This would now typically go to the Procurement Team for review.

For the demo, let's pretend Casey Kuhn is also the Procurement person.



This is where the Procurement Team would review the PO, update as needed and then **Issue the PO** – (i.e. cut/release the PO to the vendor)

Add Purchase Order

Populate **Vendor**

(\$1,099.99 item)

Populate **Destination Stockroom**

(San Diego Border)

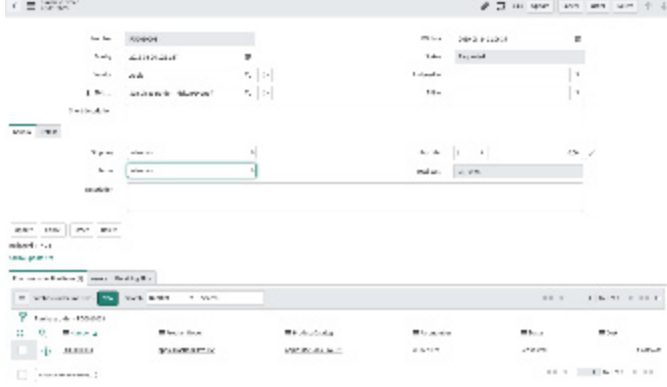
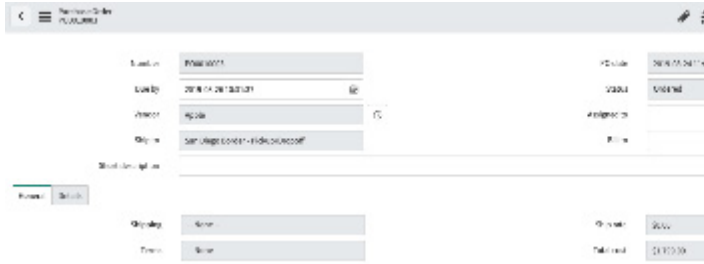
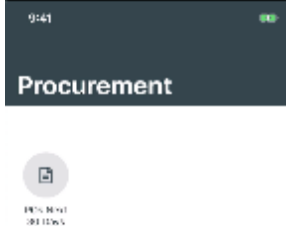
Click **Submit**



Click **OK** and it brings us back into the **Request**.

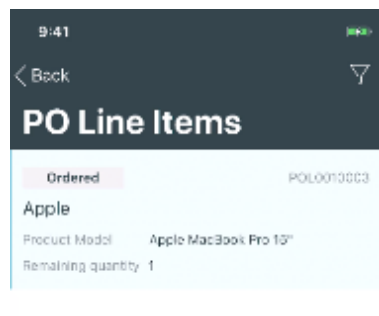
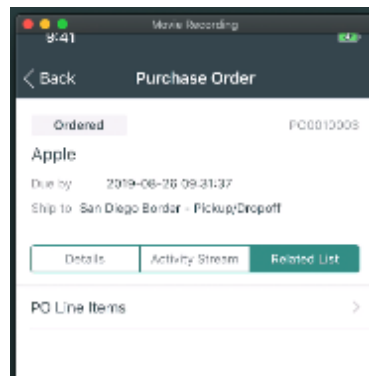
Click on the **Purchase Orders** tab

Open the **Purchase Order**

	 <p>The Status of the PO has flipped to Ordered.</p> <p>At this point, we wait for the Vendor to fulfill the PO. When the laptop shows up at the Ship to, we Receive the Purchase Order. Let's do this last step with our iPhone.</p> 	<p>Select Order to Issue the Purchase Order.</p> <p>....time passes</p> <p>....Vendor sends laptop</p> <p>.... Laptop arrives</p> <p>Let's do the Receiving with the mobile app!</p>
<p>HR + SAM + Mobile</p>	<p>Casey Kuhn goes into the NOW Agent mobile app to Receive the PO.</p>  <p>Scroll to the bottom of the list and select our Purchase Order.</p>	<p>Logon to NOW Agent as casey.kuhn</p> <p>pw = (Sh0wc@se)</p> <p>Select POs Next 30 days</p> <p>Select your Purchase Order</p>



Let's confirm the PO Line Items with what we are Receiving.



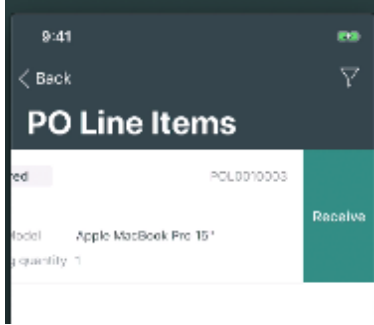
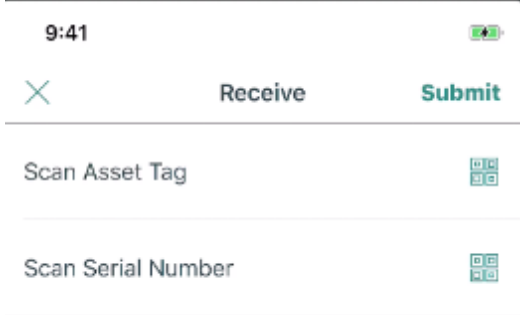
Select **Related List**


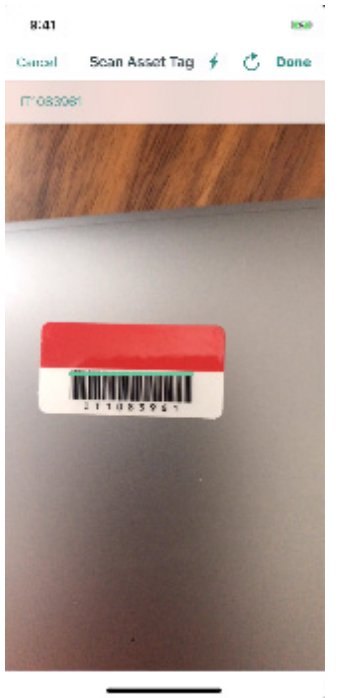
Select **PO Line Items**

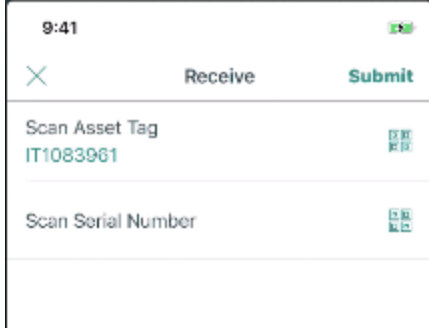
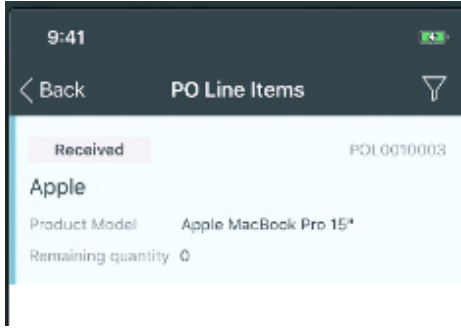
Select **Apple PO Line**

Swipe Left on the **PO Line**

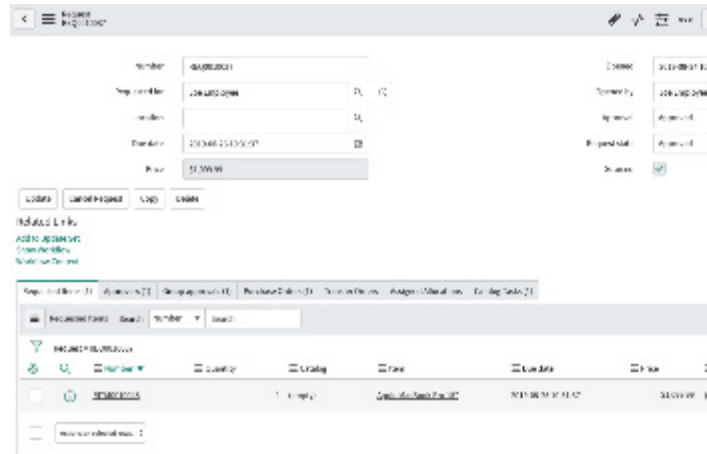
Select **Receive**

	 <p>Casey scans the barcode of the MacBook to collect the Asset Tag</p> 	<p>Select</p> <p>Scan Asset Tag</p> <p>iPhone Camera will activate.</p> <p>Scan a laptop with a barcode.</p>
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	 		<p>Confirm green line goes across your barcode.</p> <p>You'll see the Asset Tag on the top left of your screen when successful.</p> <p>Select Submit</p>
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	 <p>The laptop has now been Received.</p> <p>Purchase Order status updated.</p> <p>Asset has created in CMDB</p> <p>Workflow advances.</p>  <p>To close this out, let's go back into the web browser as Casey Kuhn.</p>	<p>Switch back to the web browser.</p> <p>Logon as casey.kuhn</p>
<p>HR + SAM + Mobile</p>	<p>Casey goes back into the original Request.</p> <p>We can see the link to the Purchase Order.</p> <p>We also have 1 final task to complete the workflow. This for someone to deliver the laptop to Joe Employee and confirm he is up and running.</p> <p>Before we do that, the IT group may want to install software or make other configurations to the laptop.</p> <p>We'll go ahead and stop here for the demo.</p>	<p>Logon to the web browser as casey.kuhn</p> <p>Go to Procurement / Requests in Filter Navigator</p> <p>Open the Request.</p> <p>Logon to NOW Mobile as</p>

Joe Employee



Logon = (employee)

pw = (Sh0wc@se)

By the way, if you go back to Joe Employee on his iPhone (NOW Mobile), he is able to see exactly where his Request is in the workflow process.

Nice!

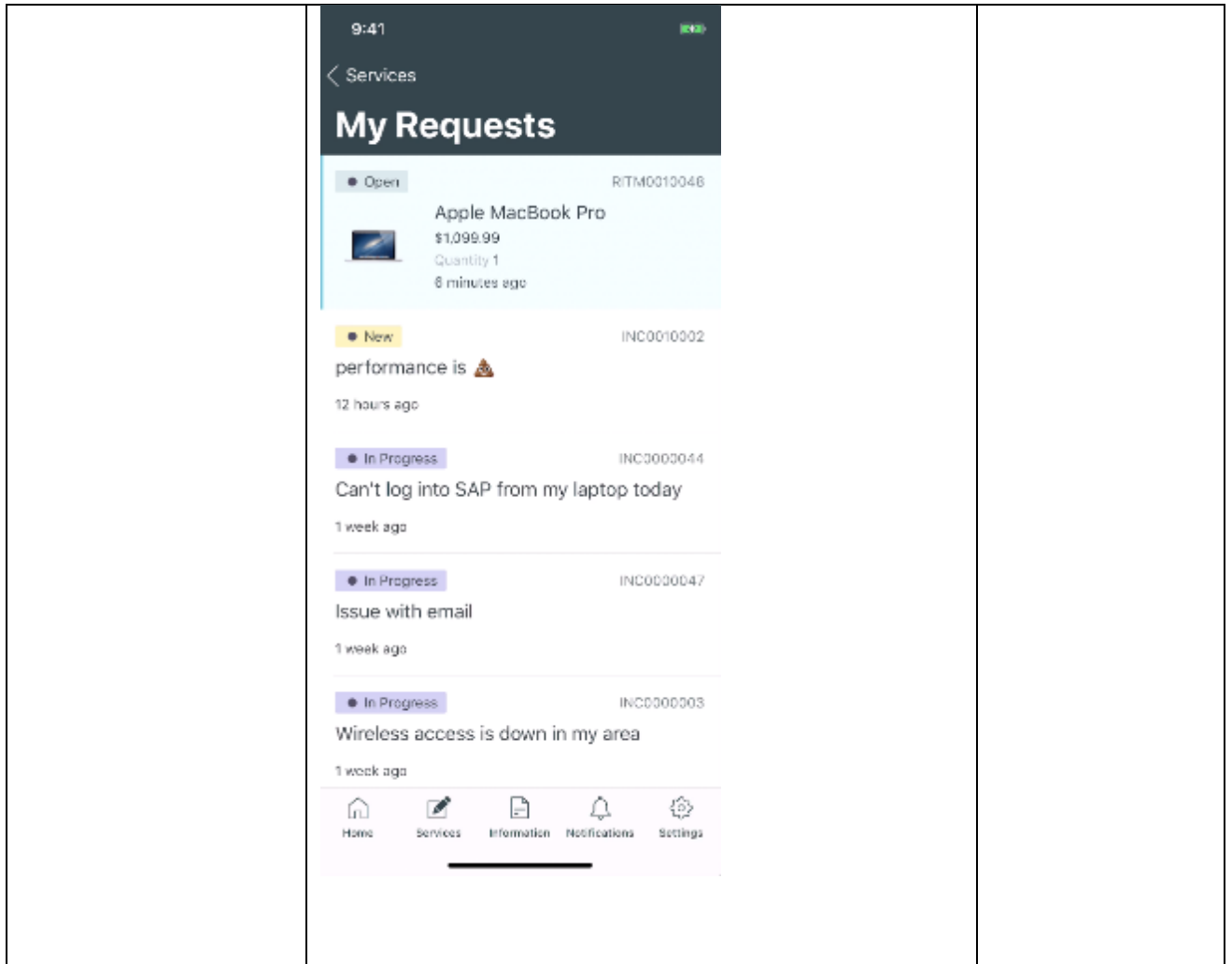
The new mobile capabilities are a nice upgrade to the employee experience.

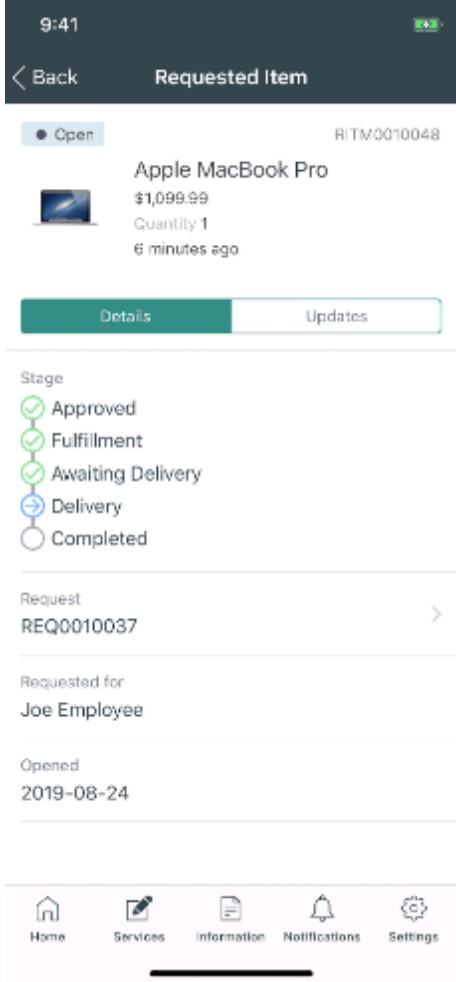
Joe can track his open Support Ticket.

Joe can create Requests

Joe can track the status of his Requests.

Click on our **Request** for the **Mac-Book**.



		
	<p>Joe is able to follow along with the progress of his Request.</p> <p>Congrats, you completed the Use Case.</p>	

Contact

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