

Catalogue Item testing guide:

Each person will test 3 roles during UAT:

1. Requester
2. Approver
3. Fulfiller

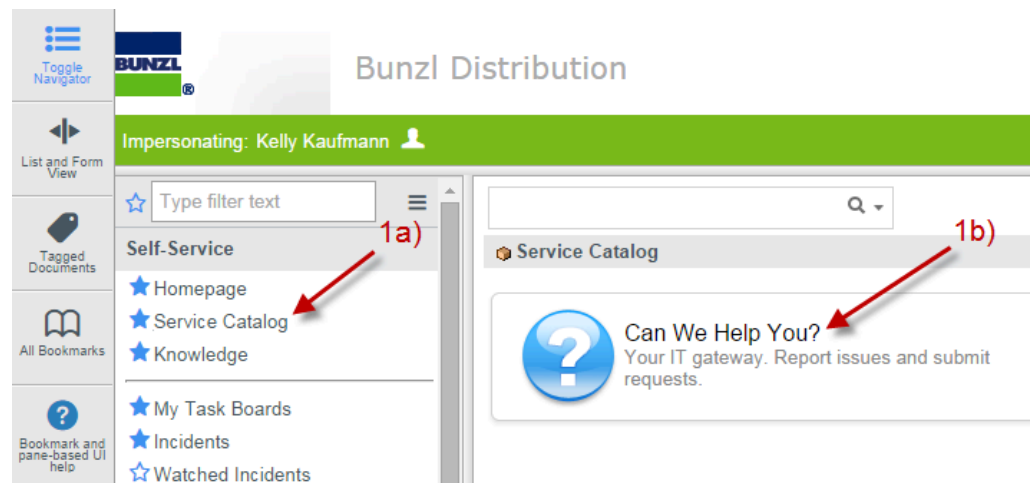
Note that after UAT, most of you will only be fulfillers or occasionally requesters.

Following is a general guide to help you navigate in ServiceNow to accomplish the 3 roles you will play during UAT.

Service Catalog Directions

1. User Entry Screen

- a. On the left hand navigation, under the “Self-Service” Application, click on the “Service Catalog” module.
- b. On the main frame, click on “Can We Help You?”



- c. Click on any Service Catalog item such as “Order Software”.

Service Catalog > Can We Help You?

Can We Help You?
Your IT gateway. Report issues and submit requests.

Items

- AS400 Access**
AS400 Access
- Folder Access Request**
Folder Access Request
- Order Software**
Order Software
- Other Request**
Other Misc Request (Doesn't fall into any other category)
- Quota Increase Request**
Quota Increase Request

- d. To submit the request, please fill out all fields in red.
- e. When finished please click on “Order now”.

Service Catalog > Can We Help You? > Order Software

Order Software

Requested for:
More information
Kelly Kaufmann

Does this request include 'Client Access'?
-- None --

Please list the software you are requesting

Do you need additional software?
-- None --

Notes/Comments
More information

Order this Item
Order Now

- f. After submitting your screen will look like this below. Please keep track of your request number.
- g. Note stages from the beginning to the end of the workflow life cycle.

Order Status

✓ Thank you, your request has been submitted

Order Placed: 2014-09-11 14:06:12
 Request Number: REQ0010023 [Bookmark request](#)
 Estimated Delivery Date of Complete Order: 2014-09-11

Description	Delivery Date	Stage	Price (ea.)	Qty	Total
Order Software	2014-09-11	<input checked="" type="checkbox"/> Request Approved (Approved) <input type="checkbox"/> Verifying Requirements (Pending - has not started) <input type="checkbox"/> Fulfillment (Pending - has not started) <input type="checkbox"/> Completed (Pending - has not started) <input type="checkbox"/> Obtaining Licenses (Pending - has not started)	-	1	-
Total					-

[Back to Catalog](#)
[Continue Shopping](#)
[Home](#)

2. Request Approval Screen

- To get to the approval screen, go to the “Service Catalog” application, then “Items”.
- Then click on the requested item.

Service Catalog

- ☆ Catalog
- ▼ Open Records
- ☆ Requests
- ★ Items **2a)**
- ☆ Tasks
- ▼ Catalog Definition
- ☆ Maintain Catalogs
- ☆ Maintain Categories
- ☆ Renderers
- ☆ Maintain Dynamic Categories
- ☆ Maintain Items
- ☆ Content Items
- ☆ Ordered Item Links
- ☆ Order Guides
- ☆ Record Producers

Requested Items [New](#) Go to: Number

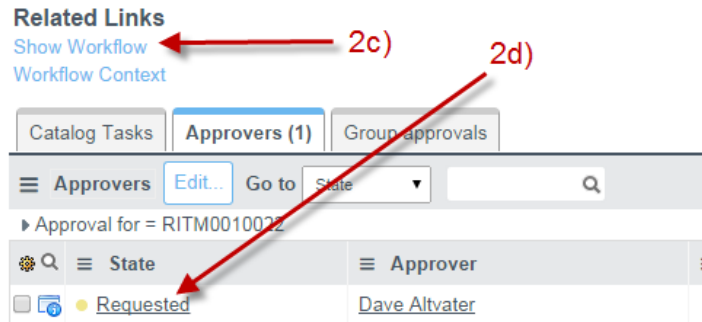
► All > Active = true

Number	Item	Stage	Request
RITM0010023	Order Software	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	REQ0010023
RITM0010022	Order Software	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	REQ0010022
RITM0010019	AS400 Access	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	REQ0010019
RITM0010018	Order Software	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	REQ0010018
RITM0010017	Other Request	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	REQ0010017
RITM0010016	AS400 Access	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	REQ0010016
RITM0010013	VPN	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	REQ0010013

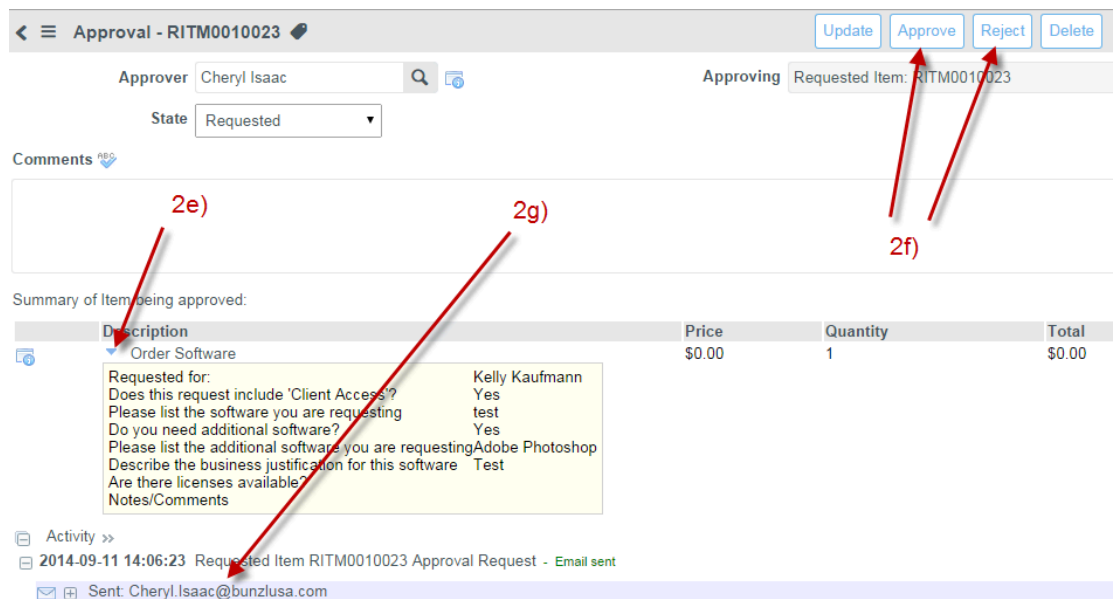
Actions on selected rows...

- Click on “Show Workflow” to view the request item workflow. This will open up a new tab automatically.

- d. To go to the approval, go to the “Approvers” tab. Then click on the “Requested” state to view the approval screen.



- e. Proceed to click on the blue arrow to view additional request details.
- f. When ready click on the Approved or Rejected button on the top right hand side of the screen.
- g. Notice under activity there is an email for the approver. It will keep track of all changes on the requested item level here.



3. Closing out a task

- a. To get to the task screen, go to the “Service Catalog” application, then “Items” again. You can alternately go directly by going to “Tasks” under Service Catalog item.

- b. Then click on the requested item to view item details.

The screenshot shows the 'Service Catalog' sidebar on the left with a search bar and a list of menu items. The main area displays a table of 'Requested Items' with columns for Number, Item, Stage, and Request. Red arrows labeled '3a)' and '3b)' point to the 'Items' menu item and a specific item row (RITM0010023) respectively.

Number	Item	Stage	Request
RITM0010023	Order Software	⊕ ✓ □ □ □ □	REQ0010023
RITM0010022	Order Software	⊕ ✓ □ □ □ □	REQ0010022
RITM0010019	AS400 Access	⊕ ✓ → □ □ □	REQ0010019
RITM0010018	Order Software	⊕ ✓ □ □ □ □	REQ0010018
RITM0010017	Other Request	⊕ ✓ □ □ □ □	REQ0010017
RITM0010016	AS400 Access	⊕ ✓ → □ □ □	REQ0010016
RITM0010013	VPN	⊕ □ □ □ □ □	REQ0010013

- c. On the bottom of the item screen, under the “Catalog task”, click on the task number that was assigned to your group.

The screenshot shows the 'Catalog Tasks' section with a 'Related Links' area and a table of tasks. Red arrows labeled '3c)' point to the 'Catalog Tasks (1)' tab and a task row (TASK0010028) respectively.

Number	Assignment group	Assigned to
TASK0010028	Systems Administration	

- d. Please update the work notes and close the task by clicking on the close task button.

Catalog Task - TASK0010028 Update Close Task Delete

Number: TASK0010028

Assignment group: Systems Administration

Assigned to:

Configuration item:

Active: ☒

Short description: Verify software requirements and determine appropriate solution

Description:

1. Verify actual software requirements
2. Determine appropriate software solution

Work notes:

Approval: Not Yet Requested

Priority: 1 - Critical

State: Open

Request item: RITM0010023

Requested for: Kelly Kaufmann

3d) →

4. Request Overview

- To go to the top level request summary, under “Service Catalog”, select the “Requests” module.
- To view all requests including closed out requests, click on “All” cookie crumbs.
- Select your Request that was just closed.

Service Catalog

- Catalog
- Open Records
- Requests
- Items
- Tasks
- Catalog Definition
- Maintain Catalogs
- Maintain Categories
- Renderers
- Maintain Dynamic Categories

Requests

All > Active = true

Number	Short description
REQ0010022	Order Software
REQ0010021	AS400 Access
REQ0010019	AS400 Access
REQ0010018	Order Software
REQ0010017	Other Request
REQ0010016	AS400 Access
REQ0010013	VPN

4a) →

4b) →

4c) →

- Notice the “Request state” is marked as complete. Also there will always be 1 email that goes to the requestor after submitting. And there will be 1 email that goes to the

Request - REQ0010023

Number: REQ0010023

Requested for: Kelly Kaufmann

Location:

Due date: 2014-09-11 14:06:12

Price: 0

Opened: 2014-09-11 14:06:12

Opened by: Kelly Kaufmann

Approval: Approved

Request state: Closed Complete

Activity >>

2014-09-11 14:53:00 Your request REQ0010023 has been completed - Email sent

Sent: Kelly.Kaufmann@bunzlusa.com

2014-09-11 14:52:52 Tuan Nguyen - Changed: Additional comments

Request Automatically Closed as all Line Items were complete

2014-09-11 14:06:23 Request REQ0010023 has been opened on your behalf - Email sent

Sent: Kelly.Kaufmann@bunzlusa.com