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
ServiceNow

Process with ServiceNow

<table>
<thead>
<tr>
<th>BRC Request and Workflow System (ServiceNow)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department Requester</td>
</tr>
<tr>
<td>Prepares Request (attach docs)</td>
</tr>
<tr>
<td>Department Approver</td>
</tr>
<tr>
<td>Approves Request (electronic approval)</td>
</tr>
<tr>
<td>BRC</td>
</tr>
<tr>
<td>Completes Request</td>
</tr>
</tbody>
</table>

✓ No more logging!
✓ No more copying!
✓ No more paper!
✓ Transparent process!
How do I use it?

https://ucop.service-now.com

Chrome & FireFox work best

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.
How do I use it?

BRC Forms Are Here
How do I use it?

**BRC Forms Are Here**
# Business Resource Center

**General Requests for Non-Payroll Services**

### Items
- [ ] Generate a report for BRC requests by department
  
  On demand department report

### Related Categories

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Procurement (L-Proc)</td>
<td>Compliance, Accounting, Audit and Policy (CAAP)</td>
</tr>
<tr>
<td>Purchase Order and Payments (POP)</td>
<td>Travel and Entertainment requests</td>
</tr>
</tbody>
</table>
### Local Procurement (L-Proc)

<table>
<thead>
<tr>
<th>Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract</td>
</tr>
<tr>
<td>PO Change Order (L-Proc)</td>
</tr>
<tr>
<td>RFx</td>
</tr>
</tbody>
</table>

### Compliance, Accounting, Audit and Policy (CAAP)

<table>
<thead>
<tr>
<th>Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost Transfer</td>
</tr>
<tr>
<td>Signature Delegations</td>
</tr>
<tr>
<td>System Access Request</td>
</tr>
<tr>
<td>Travel and Entertainment Card Application</td>
</tr>
</tbody>
</table>

### Travel and Entertainment requests

<table>
<thead>
<tr>
<th>Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel &amp; Business Entertainment Reimbursement</td>
</tr>
<tr>
<td>T&amp;E PTA</td>
</tr>
<tr>
<td>V-Card Hotel Request</td>
</tr>
</tbody>
</table>
### Purchase Order and Payments (POP)

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

And 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)
How do I use it?

Standard on all forms
How do I use it?

Standard on all forms

Request Information

- Requested on behalf of (yourself or someone else)
  
- Request description

- Business justification (purpose)

Receives notification

What is it?

What is the UC purpose?
How do I use it?

Standard on all forms

[Form fields: Department code (required), Department name (auto-populates)]
How do I use it?

Rush!

- Department code
- Rush: Yes
- Date needed by

- Department name
- Reason for rush request
How do I use it?

Mandatory v. Non-mandatory
How do I use it?

Attachments

Click to attach
How do I use it?

Additional comments or Instructions
How do I use it?

FAUs & Approvers

- Click to add a new FAU distribution
- Automatically populates from form
How do I use it?

FAUs & Approvers

Select FAU

Click
How do I use it?

Select Account

[Image of a webpage showing a search for an account with the account number 663600]
How do I use it?

Enter project/source

Optional fields determined by department
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

<table>
<thead>
<tr>
<th>FAU*</th>
<th>Project</th>
<th>Source</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>M-111111-111111-11</td>
<td>123456</td>
<td>abcdef</td>
<td>500</td>
</tr>
<tr>
<td>M-665580-69400-03</td>
<td></td>
<td></td>
<td>500</td>
</tr>
</tbody>
</table>

Select Choose Approvers to select the approvers for each FAU included in the FAU Distribution.
How do I use it?

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?

Approval

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

<table>
<thead>
<tr>
<th>Number</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RITM0167530</td>
<td>Pay an invoice without a PO; Approval is required</td>
</tr>
</tbody>
</table>

Your tracking number
Notifications

Ticket open

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

Approval email

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
Requested 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

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 here to reject RITM0167536
- Click here to view Requested Item: LINK
- Click here to view Approval Request: LINK
- Click send to approve

Subject: Re: RITM0167536 - approve
Ref: MSG3127590
Notifications

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.

---

Requested Item RITM0168583 has been commented -- Cost Transfer

2017-09-25 12:01:00 PM PDT - Jan Kehoe

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 Request Item and update the Req

Priority: Request

Ticket summary: Details: Name = Amy Vrizuela Email = Amy.Vrizuela@ucop.edu 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 below made after 120 days of the original transaction date or 90 days after fund expiration? = No Please provide any UCSD = false UCR = false UCSC = false UCSD = false UCSF = false General Ledger = false Campus Agree id = f56ed72fbd9c34003fd79531f9619b 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
Notifications

Completed

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](mailto:RITM0167536).

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

Ref: MSG3127740
How do I use it?

Status

<table>
<thead>
<tr>
<th>Number</th>
<th>Priority</th>
<th>User Name</th>
<th>Subject</th>
<th>State</th>
<th>Created</th>
<th>Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>INC0150387</td>
<td>3</td>
<td>Amy Vrizuela</td>
<td>BRC Form: Cost Transfer: missing additional comments or worknotes on the RITM</td>
<td>Open</td>
<td>2017-09-12 11:38:07 AM</td>
<td>2017-09-15 09:28:13 AM</td>
</tr>
<tr>
<td>RITM0165405</td>
<td>Request</td>
<td></td>
<td>Relocation Expense</td>
<td>Work In Progress</td>
<td>2017-09-01 01:25:26 AM</td>
<td>2017-09-06 11:09:49 AM</td>
</tr>
<tr>
<td>RITM0165785</td>
<td>Request</td>
<td></td>
<td>Relocation Expense</td>
<td>Work In Progress</td>
<td>2017-09-06 11:04:18 AM</td>
<td>2017-09-06 11:04:58 AM</td>
</tr>
<tr>
<td>RITM0581770</td>
<td>Request</td>
<td></td>
<td>Pcard - BRC</td>
<td>Work In Progress</td>
<td>2015-12-04 09:03:02 AM</td>
<td>2017-05-04 10:05:56 PM</td>
</tr>
</tbody>
</table>
# How do I use it?

## Status/Searching Requests

<table>
<thead>
<tr>
<th>Request Number</th>
<th>Item Description</th>
<th>Approval</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>RITM0086254</td>
<td>Contributions, Donations, &amp; Sponsorships</td>
<td>Approved</td>
<td>Closed</td>
</tr>
<tr>
<td>RITM0093981</td>
<td>Pay Invoice without PO</td>
<td>Approved</td>
<td>Closed</td>
</tr>
<tr>
<td>RITM0080965</td>
<td>Pay Invoice with PO</td>
<td>Approved</td>
<td>Closed</td>
</tr>
</tbody>
</table>

All > Request User Name = Amy Vrizuela or Requested By = Amy Vrizuela
How do I use it?

Status/Searching Requests
How do I use it?

### Status/Searching Requests

*or Requested By = Amy Vrizuela*

<table>
<thead>
<tr>
<th>Description</th>
<th>Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Details: Vendor Name = Shred-It Business justification (purpose) = Onsite regular service - shredding Location: UC Path - Riverside Department = BRC - Business Resource Center Invoice number = 9408917946 Requested on behalf of (yourself or someone else) = Roy Feliciano Invoice amount = 120.21 Total amount = 120.21 Amount type = $ (Dollars) GUID = f095bca00fc91e003a8591dbe1050e00 Invoice attached = true Request description = Shred-It Invoice Email = <a href="mailto:Amy.Vrizuela@ucop.edu">Amy.Vrizuela@ucop.edu</a></td>
<td></td>
</tr>
<tr>
<td>Approved</td>
<td></td>
</tr>
<tr>
<td>Approved</td>
<td></td>
</tr>
<tr>
<td>Approved</td>
<td></td>
</tr>
<tr>
<td>Approved</td>
<td></td>
</tr>
</tbody>
</table>

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

Business Resource Center
General Requests for Non-Payroll Services

Items

- Generate a report for BRC requests by department
  On demand department report

Find out what’s outstanding

Related Categories

- Local Procurement (L-Proc)
- Purchase Order and Payments (POP)
How do I use it?

Status/Searching Requests

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
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
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)

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

<table>
<thead>
<tr>
<th>Number</th>
<th>Created</th>
<th>Amount</th>
<th>Item</th>
<th>Request</th>
<th>Subject</th>
<th>Description</th>
<th>BRC Request</th>
<th>State</th>
<th>User Name</th>
<th>Requested by</th>
</tr>
</thead>
<tbody>
<tr>
<td>RITM0164908</td>
<td>2017-08-29 03:22:39 PM</td>
<td>100</td>
<td>Pay Invoice with PO</td>
<td>REQ0158453</td>
<td>Pay Invoice with PO</td>
<td>Details: Name = Brad Niess Email = <a href="mailto:Brad.Niess@ucop.edu">Brad.Niess@ucop.edu</a> Phone = (510)987-9913 Department = Business Resource Center Requested on behalf of (yourself or someone else) = Brad Niess</td>
<td></td>
<td></td>
<td>Brad Niess</td>
<td>Brad Niess</td>
</tr>
<tr>
<td>RITM0127890</td>
<td>2016-11-19 06:33:08 PM</td>
<td>49.5</td>
<td>Office Supply Order</td>
<td>REQ0123083</td>
<td>Office Supply Order</td>
<td>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) = Lorreli Esteban</td>
<td>BRC Action</td>
<td></td>
<td>Lorreli Esteban</td>
<td>Lorreli Esteban</td>
</tr>
<tr>
<td>RITM0127889</td>
<td>2016-11-19 06:26:44 PM</td>
<td>1103.87</td>
<td>Office Supply Order</td>
<td>REQ0123082</td>
<td>Office Supply Order</td>
<td>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) = Lorreli Esteban Total amount = 1103.87 Amount type = % (Percentage) Request description = Office supply list</td>
<td>BRC Action</td>
<td></td>
<td>Lorreli Esteban</td>
<td>Lorreli Esteban</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Number</th>
<th>Priority</th>
<th>User Name</th>
<th>Assigned to</th>
<th>Subject</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>RITM0124297</td>
<td></td>
<td></td>
<td></td>
<td>Request</td>
<td>Open</td>
</tr>
<tr>
<td>INC0104860</td>
<td>High</td>
<td>Amy Vrizuela</td>
<td>Kalyan</td>
<td>ServiceNow - Not Working in Safari Properly</td>
<td>Open</td>
</tr>
<tr>
<td>RITM0081770</td>
<td></td>
<td></td>
<td></td>
<td>Request</td>
<td>Work in Progress</td>
</tr>
</tbody>
</table>
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.
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.

<table>
<thead>
<tr>
<th>Requested Items</th>
<th>Search</th>
<th>Item</th>
<th>Description</th>
<th>Approval</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>RITM0081770</td>
<td>Search</td>
<td>Pcard - BRC</td>
<td>Details: Department name = ITS CLIENT...</td>
<td>Approved</td>
<td>Work in Progress</td>
</tr>
<tr>
<td>RITM0120083</td>
<td>Search</td>
<td>Pay Invoice with PO</td>
<td>Details: Vendor Name = Testing Busi...</td>
<td>Approved</td>
<td>Pending</td>
</tr>
</tbody>
</table>
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!!