

ServiceNow

PROCUREMENT

Version 1.0

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Definition of Commonly Used Terms

ITIL: An acronym for Information Technology Infrastructure Library, ITIL is a set of practices for IT service management (ITSM) that focuses on aligning IT services with the needs of business.

ITSM: IT service management refers to all activities that are performed by an organization to plan, design, deliver, operate and control information technology (IT) services offered to customers. These activities are directed by policies, organized and structured in processes and supporting procedures.

Incident: An unplanned interruption to an IRT Service or a reduction in the quality of an IRT Service. For example: A user's email client stops working.

Service Request: A request submitted by a user for some type of service, software or hardware. Service requests generally refer to something the user wants and/or needs but does not already have, such as a printer or laptop.

Change: The addition, modification or removal of anything that could have an effect on IRT Services.

Caller: ServiceNow term for user/customer.

Procurement: the series of activities and procedures necessary to acquire information technology (IT) products and services.

Vendor: A Third Party responsible for supplying goods or Services that are required to deliver IT Services.

Manufacturer: A person or company that makes goods for sale.

An online version of this document, information about supported browsers and other resources can be found here: <http://www.rowan.edu/servicenow-resources>

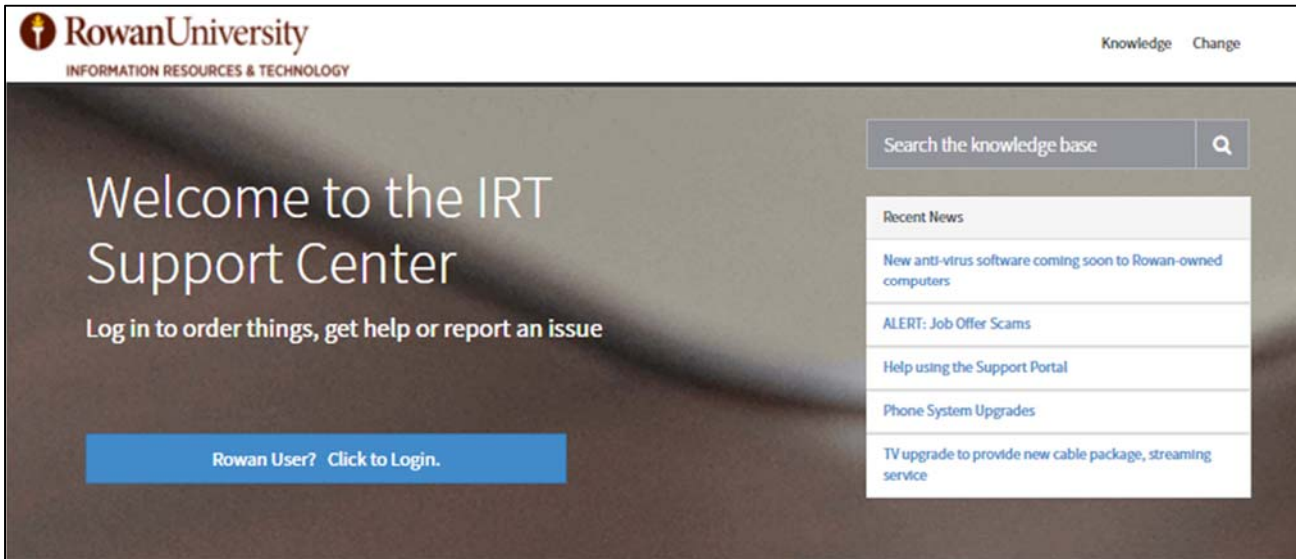
NOTE: This manual assumes that Technicians have a working knowledge using and navigating in ServiceNow.

Client Orders

Logging into ServiceNow

Open a web browser (Chrome is recommended) and navigate to <http://support.rowan.edu>

If you are already authenticated to CAS, you might bypass this login page.



If you are a technician who is completing work, click the "Technician" once you are logged into the Web Portal, you will be redirected to the full ServiceNow application.



If you are in the application and would like to return to the web portal, you can re-enter the link in your browser with an /sp at the end.

Safari Warning: A recent update to Safari has impacted the appearance of ServiceNow. ServiceNow is aware of the issue and is investigating a resolution. The recommended workaround is to use a different browser, such as Chrome, until the issue can be resolved.

The Support Portal and Ordering Hardware

While technicians can click the **Technician** link in the top menu to open the full application, end users can use the Support Portal to get help, submit an incident or request, check the status of an incident or request and search the knowledge base.

Once logged in, users will see the following:

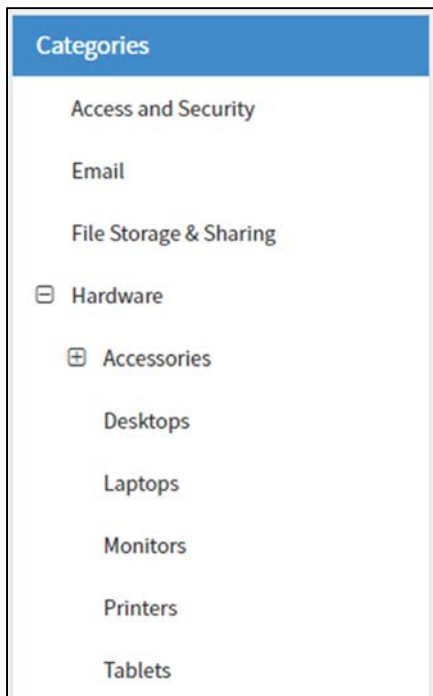
The screenshot shows the Rowan University Support Portal interface. At the top left is the Rowan University logo with the text "INFORMATION RESOURCES & TECHNOLOGY". To the right of the logo is a navigation menu with links for "Technician", "Knowledge", "Service Catalog", "My Incidents", and "My Requests", followed by a user profile icon. Below the navigation is a large banner area with the text "How can we help?" and a search bar containing the same text. Underneath the banner are three main service tiles: "Get Help" (with a person icon and description "Contact support to make a request, or report a problem"), "Knowledge Base" (with a document icon and description "Browse and search for articles"), and "Request Something" (with a briefcase icon and description "Browse the catalog for services and items you need"). Below these tiles are three columns of content: "My Open Incidents" (listing "Blackboard Email not working" and a reply), "Popular Knowledge" (listing "New Faculty and Employee Network and Banner Account Information" and "Rowan University opens new buildings"), and "My Requests" (listing "Resource Mailbox", "IMac 21.5 inch", and "ThinkPad T460s").

How to Order or Request a Quote for Hardware

Please Note: *Items used in this walkthrough do not reflect actual items available for purchase and may not be in the current portal.*

All orders placed through the portal result in a quote being generated as prescribed by University purchasing policy. Please continue reading for more information.

1. Click on “**Request Something**” from the support portal home page to enter the Service Catalog.
2. On the left side of the screen, you will see the Categories list on the left side of the screen. Click **Hardware**.
3. The hardware categories available for purchase will be listed. The categories are:



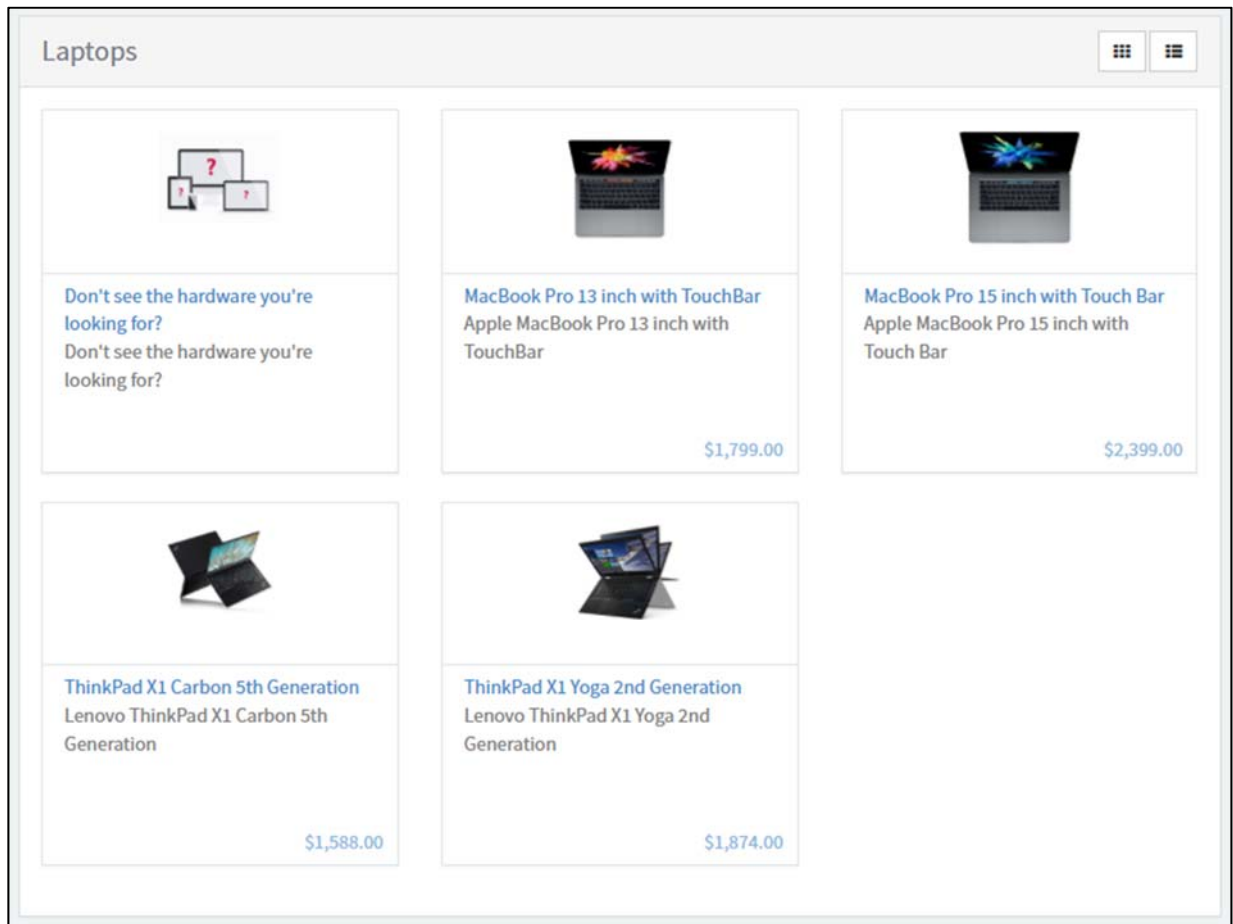
- Accessories** – Here you will find items such as Cables and Adapters, Docking Stations, Keyboards, Mice, Power Supplies and Storage devices such as flash drives.
- Desktops** – Standard Apple and Lenovo Desktop computers, such as iMacs and Lenovo ThinkCentres
- Laptops** – Standard Apple and Lenovo Laptops such as Lenovo ThinkPads and Apple MacBook Pros
- Monitors** – Computer displays in multiple sizes. This does not include televisions!
- Printers** – Current standard printers for both individual and group use.
- Tablets** – Tablet devices such as the Samsung Galaxy or Apple iPad.

Ordering a Laptop, Desktop, Tablet, Printer or Monitor

Items such as laptops, desktops, tablets and printers are required by University policy to be assigned to a specific user. The ordering process for these devices is designed to capture this information. Before ordering, please identify all recipients of these devices.

Important note on ordering desktop computers: Desktops in the catalog do not include a monitor. If you are planning on ordering a monitor, please make sure you select the model you wish to purchase from the catalog.

1. Click on the category of the device you are searching for, such as Laptop. You will be taken to the catalog for all Rowan Standard devices in this category.



Items available in the Rowan Laptop Category

2. Click on the item that you wish to order. You will be taken to the ordering screen for that item. This screen will also contain more information about the item, such as its technical specifications.
3. Complete fields on the form such as color, size, etc., if they appear. (Not all items have options!)
 - If you are ordering the item for yourself
 - Click the **“Myself”** button (this is selected by default)
 - Do not worry about quantity at this time.
 - Click the **“Add to Cart”** button.
 - If you are ordering the item for someone other than yourself:
 - Click the **“Someone Else”** button.
 - A **“Who is the Item For”** drop down list will appear.
 - In the **“Who is this item for”** drop down list, select the Rowan user that the item is for by starting to type the persons last name. A list of people will appear in the drop down list. Select the person when you see their name.
 - Do not worry about quantity of machines you wish to order at this time.
 - Click the **“Add to Cart”** button.
 - If you are ordering items for multiple people:
 - Please make sure you know who you are ordering the items for.
 - Click the **“Multiple Users”** button.
 - In the **“Who are the items for?”** field, start typing the last name of the first person you are ordering for.

- When their name appears below the field, select it. Alternately, you can highlight the name using the arrow keys on your computer and then hit the enter key.
- Repeat this process until you have selected all of the recipients for the items.
- Do not worry about quantity of machines you wish to order at this time.
- Click the **“Add to Cart”** button.

ThinkPad X1 Carbon 5th Generation

Lenovo ThinkPad X1 Carbon 5th Generation

System Unit Intel HD Graphics 620
 Processor Intel Core i5-7300U Processor (3MB Cache, up to 3.50 GHz)
 Total memory 8GB LPDDR3 1866
 Security Chip 2 Hardware dTPM
 TPM Setting Hardware dTPM2.0 Enabled
 Display 14.0" FHD (1920x1080) IPS Anti-Glare Non-Touch
 Camera 720p HD Camera with MIC
 WiFi wireless LAN adapters Intel Dual Band Wireless AC(2x2) 8265, Bluetooth Version 4.1
 Integrated wireless antenna WLAN antenna
 Battery 3cell Battery 57Wh
 Hard drive 256 GB Solid State Drive PCIe-NVMe OPAL2.0 - Capable
 AC Adapter and Power Cord 65W AC Adapter (2pin) - US (USB Type C)
 Fingerprint UltraNav (TrackPoint and TouchPad) with Fingerprint Reader
 Pointing device UltraNav (TrackPoint and ClickPad)
 Keyboard Language ThinkPad Backlit Keyboard English with Finger Print Reader and C-cover, Black
 Publication Language Publication - English
 Preload Language Windows 10 Home 64 English
 OS DPK Windows 10 Home
 Package Box Type Retail Packaging
 Display Panel 14.0" FHD (1920x1080) IPS, Anti-Glare, non-Touch, 720p HD Camera, Black
 Service 1 Protection 4YR Depot/CCI + ADP

Who is this item for?

Myself
 Someone Else
 Multiple Users

* Who is this item for?

Disclaimer: Prices and specifications are subject to change without notice. Prices stated here are for reference only and may vary from the actual vendor quote.

Price: \$1,588

Add attachments

Ordering a Lenovo X1 Carbon for John Doe

If you have completed adding items to your cart, you may proceed to check out (**See “Finishing your request”**).

If not, click **Service Catalog** on the title bar of the screen or in the page’s breadcrumbs to return to the catalog.



Click “Service Catalog” in either location to continue shopping

Ordering Accessories

Unlike the items above, accessories such as USB cables and mice do not need to be assigned to individual users during the ordering process. These items will be assigned to the person entering the order.

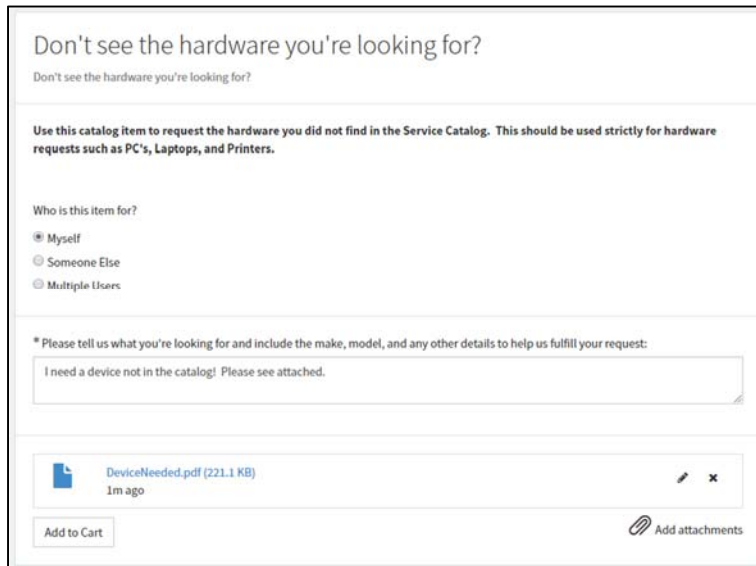
To add an accessory to your Shopping Cart:

1. Select the category of the Accessory you wish to purchase.
2. Select the item you wish to purchase.
3. On the item screen, select the quantity you wish to purchase.
4. Click **“Add to Cart”**

Ordering an Item Not in the Catalog

If you are looking to order an item that is not currently in our catalog:

1. Select the category of the item you are looking for, such as Laptop or Accessory.
2. Click the **“Don’t see the hardware you’re looking for?”** item.
3. Choose whether you are ordering this for yourself, someone else, or multiple users (see above for more information.)
4. Fill out the **“Please tell us . . . ”** field with as much information as possible about the item you are looking for.
5. If you have a file, such as a pdf, with a quote or specifications of the item you are looking for, click the **“Add Attachment”** link at the bottom right of the form.
 - a. A file window will open on your computer.
 - b. Select the file you wish to attach.
 - c. Click **“Open”**
6. Click **“Add to Cart”**











The screenshot shows a web form titled "Don't see the hardware you're looking for?". Below the title is a subtitle "Don't see the hardware you're looking for?". A paragraph of text reads: "Use this catalog item to request the hardware you did not find in the Service Catalog. This should be used strictly for hardware requests such as PC's, Laptops, and Printers." Below this is a section "Who is this item for?" with three radio button options: "Myself" (selected), "Someone Else", and "Multiple Users". A note says: "* Please tell us what you're looking for and include the make, model, and any other details to help us fulfill your request:". Below the note is a text input field containing "I need a device not in the catalog! Please see attached." At the bottom, there is a file attachment area showing "DeviceNeeded.pdf (221.1 KB)" uploaded "1m ago". To the left of the file is an "Add to Cart" button, and to the right is an "Add attachments" button with a paperclip icon.

Completed form with attached PDF file for an item not in the catalog

Finishing Your Request

Once you have completed adding your items to the cart, it is time to complete your order.

1. Click the **Cart** icon in the top right of the screen. You will see a list of items in your cart.
2. Click the **“Checkout”** button.
3. If you wish to change the quantity of any of your items, click the **Quantity** field of the item and adjust it using the up or down arrow. Please note that the price will not adjust until you click away from the field.
4. If you wish to change the items details, such as the owner or color (if applicable), click the blue square icon with the pencil. Click **Save** in the window when you have finished with your changes.
5. If you wish to remove an item from your cart, click the red square icon with the trash can. Please note, clicking this box will immediately remove the item from your cart.
6. In the **“Person responsible for the order’s financial transaction”** please select the name of the person to whom the quote should be sent. This will be the same as the person who is responsible for entering the requisition in Banner Finance.
7. Select the **Campus Location** where the purchase will be directed when received. For clinics, please select the Stratford campus.
8. Enter any additional information about the order in the **Special Instructions** field - e.g. *“Please double the system memory (RAM) of the computer for John Doe”*.
9. Once you have reviewed your request and finished any updates, click the **“Checkout”** button. The button will change to say it is **“Ordering...”** and your shopping cart will be emptied when complete.

Product	Requested for	Price	Quantity	Subtotal	
 ThinkVision T2324d 23 inch Monitor Lenovo ThinkVision T2324d 23-Inch LED Backlit LCD Monitor	Doe, Jane	\$139.00	1	\$139.00	 
 ThinkPad X1 Carbon 5th Generation Lenovo ThinkPad X1 Carbon 5th Generation	Doe, Jane	\$1,588.00	1	\$1,588.00	 
 ThinkPad USB-C Dock Lenovo USB-C Dock	Doe, Jane	\$199.99	1	\$199.99	
				Total price: \$1,926.99	

Person responsible for handling this order's financial transaction
Fleischner, Marc

Campus Location

Special instructions

Ordering Tips

- Individuals can have more than one quantity of an item by editing the quantity for their line item. If the item does not allow multiple quantities, this option will not be displayed.
- Item variables can be edited by selecting the blue edit button per line item and editing the variables for that item. This includes but is not limited to:
 - Color
 - Recipient
 - Location
 - etc...

Continue Shopping Save as Bundle Checkout

The Checkout Screen

Reviewing Your Order

To review your order, click **“My Requests”** on the page header, and then click **“View All Requests.”** You will be taken to a page where you can view all of your open and previous requests. Click the request you wish to review. On this screen you can add comments to your request, or see the status of each requested item.

Receiving and Approving Your Quote

Once a member of the IRT Staff has received your request, they will work on assembling your quote(s). Once the quote has been assembled, the person listed as responsible for the order’s financial transaction will receive an email from support@rowan.edu with a subject of **“Request REQ##### Approval Request.”** At the bottom of the page, click the **“Click here to view Quote(s) link.”** A PDF of your quote will download to your computer.

Alternatively, you can login to the support portal at support.rowan.edu and open your request. On the bottom right there is an **“Attachments”** section. Click on the link to download the quote.

Once you are ready to order your item, you MUST CREATE A REQUISITION IN BANNER as per the current University purchasing process.

Once you have created the request, please approve your quote by clicking the **“Click here to approve REQ#####”** link in the email you received. An email will automatically be created for you. Click **“Send.”** There is no need to change or add to the email. Alternatively, you can approve your request by logging in to the support portal at support.rowan.edu and clicking **“My Approvals”** on the page header. Click on the request number to open the order record. Click the green **“Approved”** button. This will notify IRT that a Purchase Order for the item will be created and that IRT will need to place the order with the vendor (when applicable).

The screenshot shows a web interface for an approval form. At the top, there is a navigation bar with links: Technician, Knowledge, Service Catalog, Change, My Requests (7), My Incidents (3), My Approvals (1), and a Cart icon. Below the navigation bar, the breadcrumb path is 'Home >> Approval Form'. A search bar is located on the right side of the page. The main content area is divided into two columns. The left column has a blue header that says 'This Request requires your approval'. Below this header, there is a list of fields: 'State Requested', 'Created just now', and two buttons: 'Approve' (green) and 'Reject' (white with a grey border). The right column has a header 'Approval request for Request REQ0010855'. Below this header, there is a list of details: 'Hardware Request 02/09/18', 'Opened by Doe, John', and 'Price \$3,387.00'. Underneath, there is a section titled 'Items in this Request' which lists two items: 'Apple MacBook Pro 13 inch with TouchBar' with a price of '\$1,799.00' and 'Lenovo ThinkPad X1 Carbon 5th Generation' with a price of '\$1,588.00'. Each item has a dropdown arrow and the word 'Options' next to it.

The Approval Form

If you decide that you no longer wish to order the item, please click the **“Click here to reject REQ#####”** link in the email and then click **Send** on the email that is created. Alternatively, log in to the portal and click the **“My Approvals”** link on the page header. Click the request to view the approval, and then click the **Reject** button on the left side of screen.

If you have questions or comments on your request, including requesting a modified quote, please log into the portal at support.rowan.edu and then click **“My Requests.”** Click the request number to open the form for your request. Type your comments in the **“Type your message here”** box and click **Send**. An IRT representative will respond to your comment via the portal.

Checking on the Status of Your Order

You can check the status of your order at any time by logging into the Support Portal at support.rowan.edu and accessing your request by clicking the **“My Requests”** link on the page header. Once you have accessed your request, click on any item on the right to see what state your request is in.

States include:

- Fulfillment – IRT has sent your quote and is waiting for client approval and the Purchase Order to be completed.
- Awaiting Delivery – the order has been placed with the vendor and IRT is waiting for the item to arrive on campus.
- Configuration – The item has arrived on campus and is currently being configured for use.
- Ready for Customer – The item is ready for pickup or delivery depending on the item.
- Completed – The request has been completed.

IRT Procurement Workflow Walkthrough

Once an order has been placed through the Hardware catalog, a workflow will go through the process of fulfilling the request for the client. This process has the following stages:

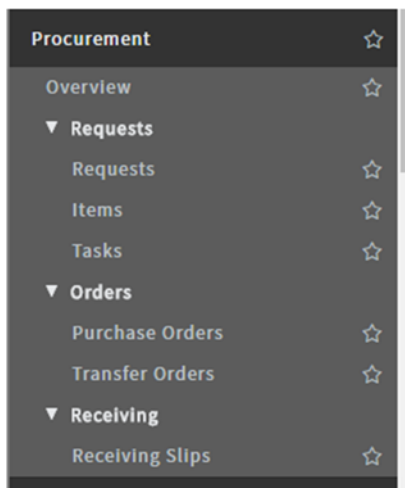
- Quote
- Order Placed with Vendor
- Item Received
- Item Deployed

The following describes the process in detail and is broken down by the groups responsible for each section of the request.

Sending the Client a Quote

IRT Procurement (Quote) Team

To see new Requests, navigate to the **Procurement Application** in Service Now. Please see “If you are moving an item from out of a Stockroom” if you are moving a computer from inventory.



1. Navigate to the Procurement Application using your preferred method and click on “**Requests.**”
2. A list view of all active Procurement Requests will be opened.
3. Sort by Assignment Group by clicking on the column heading.
4. Right click on your Assignment group and click “**Show Matching.**” You will see all Requests assigned to your group.
5. Open the request you wish to work on by clicking the “**REQxxxxxx**” number or the (i) icon.
6. Click on **Catalog Tasks** tab at the bottom of the form to see the tasks assigned to you. Open the task by clicking the **Task number**. This is the task asking for the quote that needs to be provided to the client.
7. Assign the task to yourself by updating the “Assignment Group” and “Assigned To” field.
8. Change the state of the task to “Work in Progress” and click **Update**. This will return you to the Request form.
9. To see the items that need to be quoted, click the “**Requested Items**” tab. All of the items will have their own line number.
10. Once you have the quote, save it as a PDF and attach it to the request. This is done by clicking the paperclip icon on the top of the Request form. **You must attach the pdf to the Request and not the catalog task.**



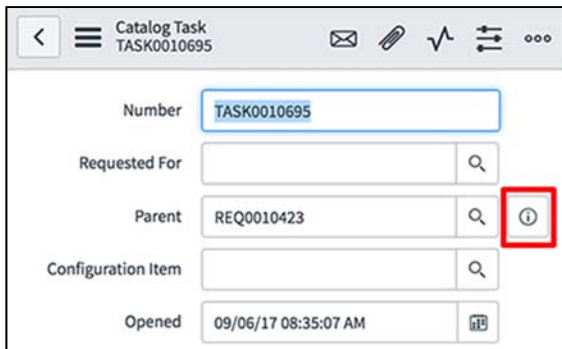
Click the Paperclip icon to attach the quote. Be sure you are attaching the file to the Request form!

11. Click on the **Catalog Tasks** tab and open your task. Click the **“Close Task”** button. This will generate an Approval Email for the client. The quote will also be available to the client for retrieval in the portal.

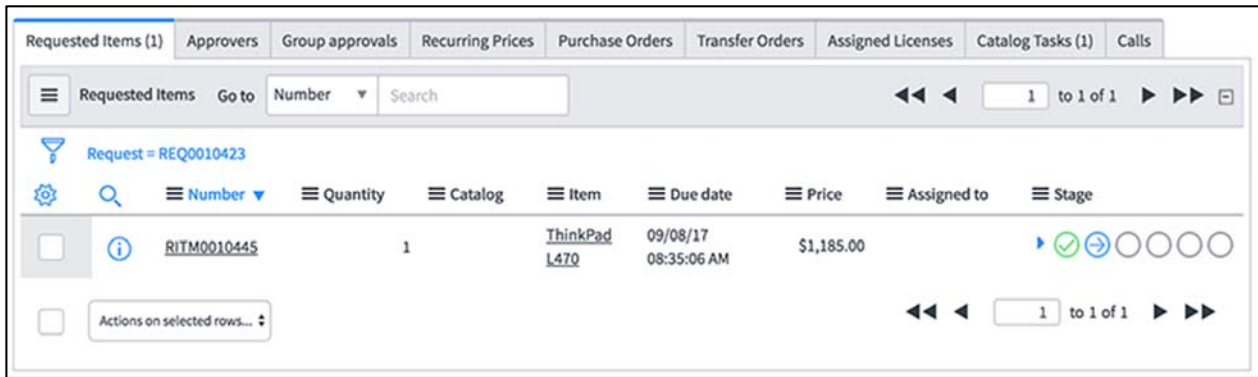
Alternate Method:

To see new Requests, navigate to the Procurement application using your preferred method.

1. Click on **Tasks** under the “Requests” item in the Procurement Application.
2. A list view of all active Procurement Tasks will be opened.
3. Open the task you wish to work on by clicking on the **“TASKxxxxxxx”** number or the (i) icon.
4. Assign the task to yourself by updating the “Assignment Group” and “Assigned to” fields and click **“Save.”**
5. Go to the parent Request by clicking the icon next to the “Parent” field on the Task form.



6. On the parent Request, click the “Requested Items” tab at the bottom of the form to see the items that need to be quoted. All of the items will have their own line number.



7. Once you have the quote, save it as a PDF and attach it to the request. This is done by clicking the paperclip icon on the toolbar on the task line. **You must attach the pdf to the Parent Request and not the catalog task.**



Click the Paperclip icon to attach the quote. Be sure you are attaching the file to the Request!

8. Click on the “Catalog Tasks” tab and open the “Request Quote from Vendor” task. Click the **Close Task** button and an Approval Email will be sent to the client. The quote will also be available to the client for retrieval in the portal.

Quote Approval

Client

Once the “Request Quote from Vendor” task has been closed, the client will receive an email that contains a link to download their quote. They can click a link in the email to either approve or deny the quotation. Either link will open an email on the client’s computer to send back to the ServiceNow system.

Clients may also log into the support portal at support.rowan.edu to approve or deny the quote for their request.

For specifics on the Approval process, see “Retrieving and Approving Your Quote.”

Sourcing the Request

Procurement Team:

After a client approves a quote, a new task will be made on the request named “Source Request Items” and will be assigned to the proper group.

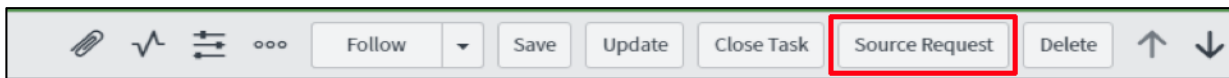
Sourcing the item will check to see if the item ordered is in stock (in the case of bulk items) or if the order needs to become a Purchase Order.

Adding a Purchase Order

Open the task by either opening the request, then clicking the “Catalog Task” tab and clicking on the Task number (i.e. TASKxxxxxx) or clicking Procurement, Tasks and then clicking the Task Number or (i) icon. The short description of the task will read “Source Open Request.”

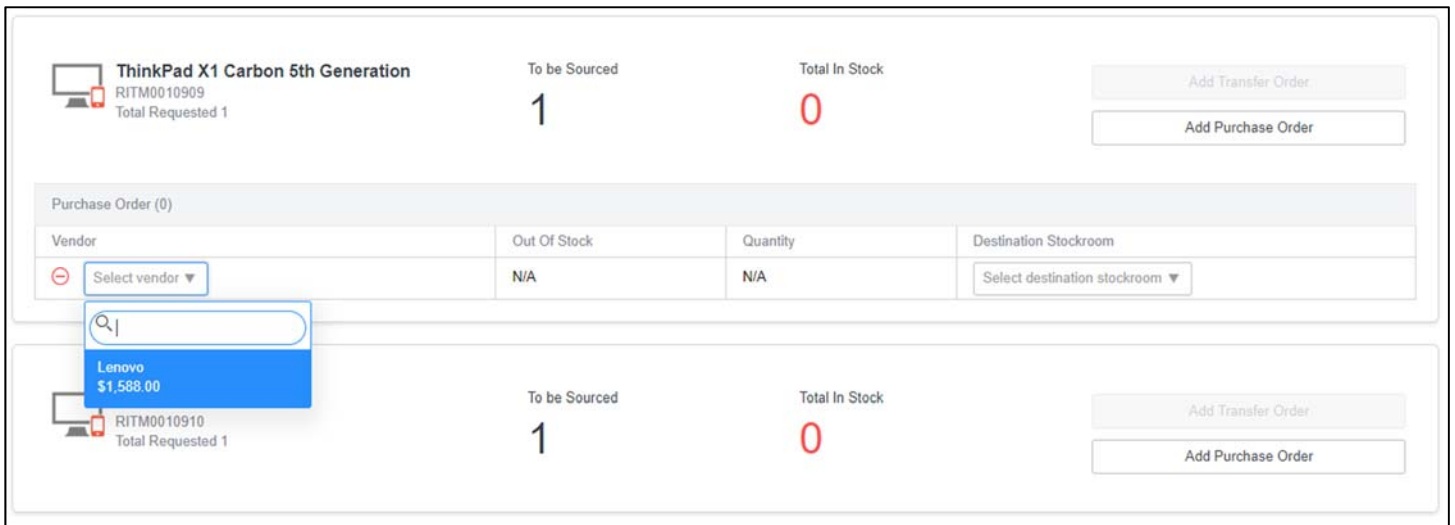
With the Task open,

1. Click “**Source Request**” on the top toolbar to open the source item screen.



2. Click the “**Add Purchase Order**” button of the first item.
3. From the list that appears on the screen, select the **Vendor** from the drop down list. Multiple vendors will make a corresponding number of Purchase Order records (i.e. an order from both Lenovo and Apple.)
4. Adjust the quantity, if needed.
5. From the **Destination Stockroom** dropdown, select the campus that item is shipping to.

6. Click **Submit**. You will receive a message titled “Source Request” with “x Purchase Order Line(s) created successfully.” (There should be one per item.) Click **OK**.
7. Repeat for all items on the PO.
8. If you are not on the parent request form, return to the it by clicking the request number on the Parents breadcrumbs.
9. Click the “Purchase Orders” tab.
10. Open the purchase order by clicking the purchase order number (i.e. POxxxxxx) or the (i) icon.
11. Enter the Rowan University generated purchase order number in the Rowan PO field.
12. Click Update or Save to save your work.



The Source Items Screen

Manually Creating a Purchase Order

Before you create a PO, you must check to make sure the model of the item you are creating the PO for has been created in ServiceNow. If it has not been created, you must email the Asset Management Coordinator to have the item created. (This will eventually be an automated Service Catalog Item.) Once the item has been created, you will be notified by the Asset Management Coordinator.

To check if a model exists, navigate to the “Product Catalog” application and then select “All Models.” Select the magnifying glass to show the column search fields. Type the name (or part of the name) of the item you are looking for. If the item exists, proceed to create the PO.

To Create the PO:

1. Use your preferred method to navigate to the “Procurement” application
2. Under “Orders”, click on “**Purchase Orders.**”
3. Click **New**.
4. Fill out all required information for the general purchase order, including the following:
 - a. Rowan PO number
 - b. Vendor Information
 - c. “Ship To” information. The “Ship To” destination is the Stockroom to which the item is being shipped.

- d. Enter a short description for the order using the following format: PO NUMBER - Person Ordering - Department - Vendor (e.g.: PNR111112222 - Doe - TS Glassboro - Lenovo)
5. Click **Save**
6. Click the “Details” tab.
7. Fill out the “Requested by” and “Department” fields. The “Requested by” field should be **the name of the person receiving the order**. Do not put the name of the person placing the order if it is different.
8. Click **Save**.

The screenshot shows a web application interface for a Purchase Order. At the top, there's a header with a back arrow, a menu icon, and the text 'Purchase Order PO0010041'. On the right side of the header are icons for search, list, and a menu, followed by buttons for 'Save', 'Update', 'Cancel', and 'Delete'.

The main form area is divided into two columns of fields:

- Left Column:**
 - Number: PO0010041
 - Rowan PO: PNR31231
 - Vendor: Lenovo (with search and dropdown icons)
 - Ship to: Glassboro (with search and dropdown icons)
 - Due by: (empty)
 - Initial request: (empty)
 - Short description: (empty)
- Right Column:**
 - PO date: 02/03/17 01:54:42 PM (with calendar icon)
 - Status: Requested
 - Assigned to: (empty)
 - Bill to: (empty)

Below these fields is a tabbed interface with 'General' and 'Details' tabs. The 'Details' tab is active, showing:

- Requested by: Fleischner, Marc (with search and dropdown icons)
- Requested: 02/03/17 01:54:42 PM (with calendar icon)
- Ordered: (empty)
- Expected delivery: (empty)
- Received: (empty)
- Contract: (empty)
- Department: Technology Services Workshop (with search and dropdown icons)
- Budget number: (empty)
- Vendor account: (empty)

At the bottom of the form are buttons for 'Save', 'Update', 'Cancel', and 'Delete'.

Purchase Order Screen with Purchaser Details

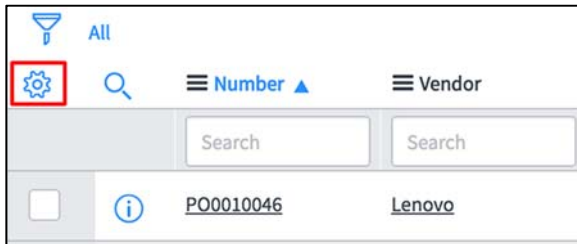
9. A new section will appear on the form for “Purchase Order Line Items”. This is used to capture the actual items you are ordering.
10. Click **Save**.
11. Click **New** next to “Purchase Order Line Items.” *If your form has not been saved, you will get a pop-up asking if you wish to stay or leave. Click Stay, then click Save and then New.*
12. Select the Vendor.
13. Select the “Product Model” field and start typing the name of the model you are searching for and select it.
14. Repeat this for the “Product Catalog” field.
15. Enter the quantity of the item in the “Ordered Quantity” field.
16. Enter the price being paid in the “Cost” field.
17. Click **Save**.
18. If you have another item, repeat the process (such as computer and monitors, etc. Each would be on a different line item).
19. Once all items have been added, click **Update** to return to the Purchase Order record.
20. On the main PO screen, click **Save**.
21. If your order has been placed with the vendor, click the **Order** button on the top of screen.

Receiving and Distribution

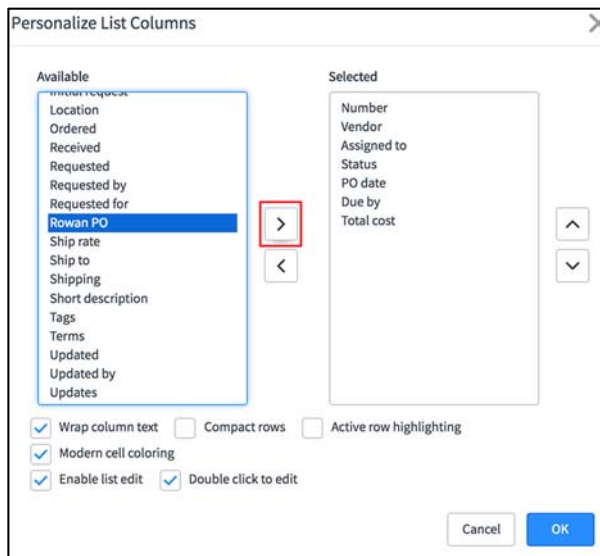
Asset Receiving and Imaging Teams

Once a shipment has been received:

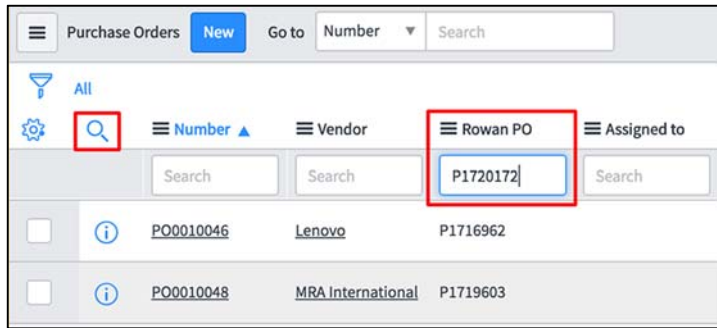
- 1) Navigate to the Procurement application using your preferred method.
- 2) Click **Purchase Orders** item under Orders to open the Purchase Orders list.
- 3) If the Rowan PO field/column is not visible, click the gear icon in the upper left.



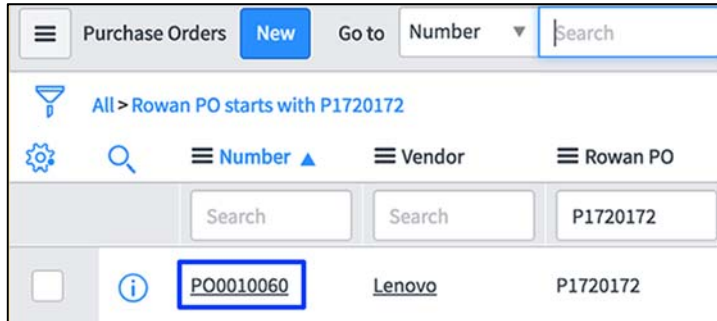
In the “Personalize List Columns” window, select “**Rowan PO**” and then click the > arrow to add it as a column in your Purchase Order list and click **OK**.



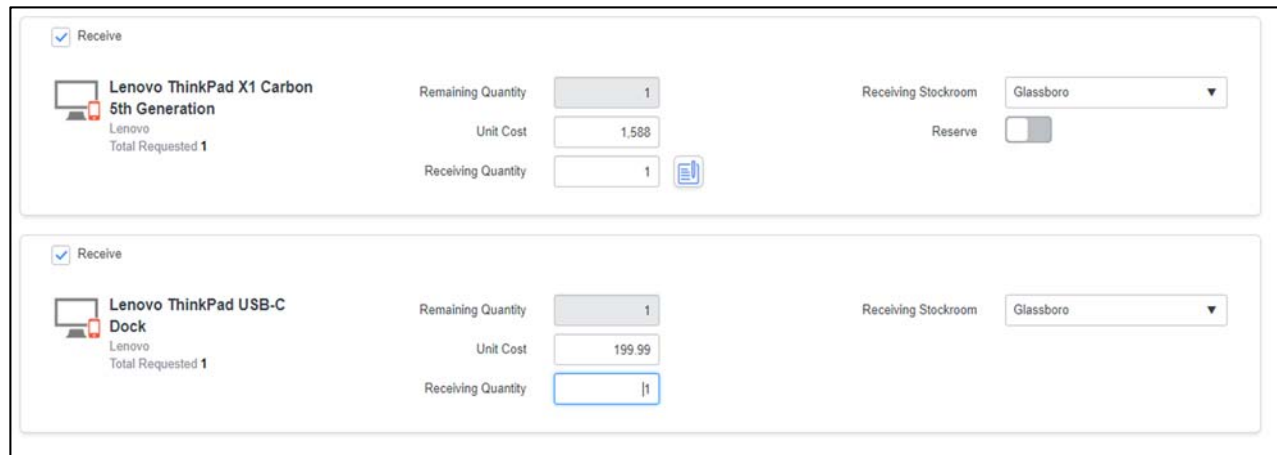
- 4) To search for the PO number of the item you have received, click on the magnifying glass above the (i) icon column to open the search boxes if they are not already visible. Type the complete Rowan purchase order number into the search box below the Rowan PO field. If you wish to type part of the number, make sure to use the proper wildcards (* or %).



5) Open the PO for the item that you are receiving by clicking on the PO number in the “Number” column.



- 6) Click the “**Order**” button on the form header. Once you click the “Order” button no changes can be made to the purchase order. The button will change to a “Receive” button.
- 7) Receive the items on the Purchase Order by clicking the “**Receive**” button on the top toolbar. This will load the Receiving screen.
- 8) Click the **Paper and paperclip icon** next to the Receiving Quantity to go to the Capture asset tags screens (for computers, printers, etc.)



The Receiving Screen

- 9) Click the (+) to insert a new row into the table. Enter the device Serial Number. Update the recipient in the “Reserved For” field if necessary. LEAVE THE ASSET TAG FIELD BLANK. Click **Done**.
- 10) Repeat for all devices where the icon appears.
- 11) Slide the “Reserved” button under the “Receiving Stockroom” field for the first item.
- 12) Click **Submit** and you should be returned to the Purchase Order Form.

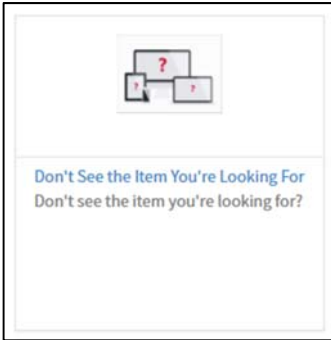
- 13) Click on the **Assets tab**.
- 14) Open the record of the first listed asset by clicking on the Asset Tag number or the (i) icon.
- 15) Change the status field to "In Use." This will automatically update the "Department" field.
- 16) Update the "Owned by" field with the recipient's names. If the recipient is not the owner, i.e. if the computer is a student worker machine, update the "Owned by" field with the name of the owner.
- 17) Complete any other relevant fields such as "Owner Type" or "Parent."
- 18) Click **Update** to return to the Purchase Order screen.
- 19) Repeat for all assets listed on the order.**
- 20) Return to the parent request by clicking the (i) icon next to the "Initial Request" field on the form.
- 21) Select the "Requested Items" tab on the bottom of the request form.
- 22) Click on the first item you will be setting up.
- 23) Open the "Configure hardware..." task.
- 24) Assign the task to yourself.
- 25) Once you have completed the task, add any relevant comments and then close the task by clicking the "Close Task" button on the form header. You will be taken back to the Requested Item record.
- 26) A new task will be created for delivery or pickup depending on the campus and/or item type.

Number	Priority	State	Short Description	Assignment Group	Assigned to	Parent
TASK0010873	5 - Normal	Open	Deliver to Customer	Field Services		BITM0010916
TASK0010866	5 - Normal	Closed Complete	Configure hardware and test system for initial bootup	Asset Receiving and Distribution	Fleischner, Marc	BITM0010916

Setup and Delivery Tasks

- 27) Open the delivery/pickup task by clicking on the Task Number or (i) icon.
- 28) Assign the task to the proper group and or technician and click **Update**. You will be returned to the parent Requested Item.
- 29) Return to the parent request by clicking the (i) icon next to the "Request" field on the form.
- 30) Repeat this process for all Requested Items on the parent Request.
- 31) Follow local procedures for completing the final Pickup/Delivery task and close it once the item has been delivered or picked up.
- 32) Once all of the Pickup/Delivery tasks have been completed, the parent Request will automatically close.

Non-Catalog Items



While we have created a robust catalog, there will still be a need for clients to ask for items not listed in the catalog. Every hardware category in the portal contains an item called “Don’t See the Item You’re Looking For?” that clients can fill out when they can’t find an item they are looking for in the catalog.

This item works just as other items in the catalog, however, it contains a free form field for the client to fill in information on what they are looking for. Clients are also encouraged to attach any supporting documents such as quotes or specifications.

The Quotation and Ordering Process

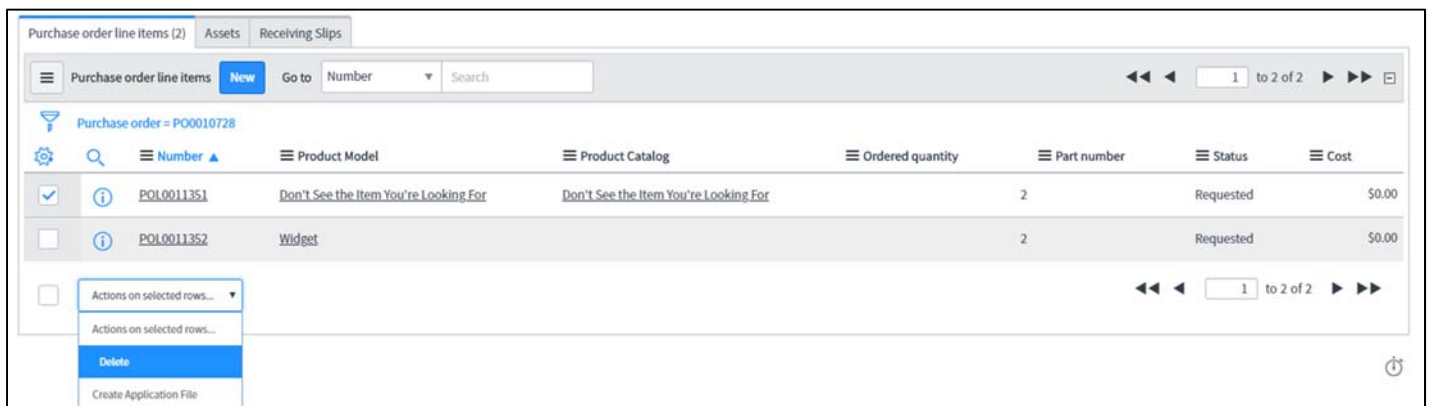
IRT Procurement (Quote) Team

As with a standard catalog order, a Request is created with a requested item called “Don’t See the Item You’re Looking For” and a catalog task for a quote request. To find the request, access either the procurement request or the procurement task using the methods outlined above and follow the steps to deliver a quote to the client.

Once the quote has been approved by the client, the “Source Request Items” task will be created. Source the item using “Unknown Manufacturer” as the Vendor and send it to the appropriate Stockroom.

Open the Purchase order as described above and update the “Rowan PO” field.

At this time, you will edit the purchase order to include the items on the PO. If the items do not exist, email snquestions@rowan.edu with the Vendor, make of the product, model name and number and price. Once you receive confirmation that the item(s) is added to the Product Catalog, click on the “Purchase Order line items” tab and then click “New.” Add the items as described in the “Manually Creating a Purchase Order” section of this manual. After all of the items are added, click the check box next to the “Don’t See . . .” line item and select the “Actions on selected rows” dropdown and then click **Delete** to remove the “Don’t See . . . item from the PO.” This avoids the creation of assets of this type.



Delete the “Don’t See What You’re Looking for” item after you’ve added the items for the PO.

Completing the Process, Receiving and Distribution

Once the Purchase Order has been updated to reflect the actual products, the remaining process is as outlined above in Step 4, Receiving and Distribution.

Distributing an Asset Currently in a Stockroom

All items being stored by IRT should be listed in your stockroom. There are two main reasons to move an item from an “In Stock” state into an “In Use” state; incident remediation or bulk order distribution. Depending on if the item is still currently listed in the catalog, you will follow one of two processes for recording the distribution of an asset from a stockroom

Assets currently in the Catalog

In cases where users have a selection of replacement computers, or if a bulk order item is still listed in the active catalog, you will be able to leverage the catalog to capture the user’s choice, or create a Request for the user receiving the item. This process should be used in these situations. It is very important that an initial request is made as it helps track the lifecycle of the item.

If the Asset is an active catalog item:

- 1) Enter a request for the recipient as outlined in the section entitled “How to Order or Request a Quote for Hardware.” Make sure the item is the same as the item you have in the stockroom. (See the section entitled “Stockrooms” for more information) When you fill out the form, use the “Someone Else” choice and fill in the recipient’s name. Use yourself for the “Person Responsible...” field on the checkout screen.
- 2) Navigate to the Procurement Requests list or Tasks lists and open the task for the item you just “ordered” in the portal.
- 3) Open the “Request Quote from Vendor” task.
- 4) Click the “**Source Request**” button on the form header.
- 5) Click the “**Add Transfer Order**” button.
- 6) Select the “Source” and “Destination” Stockrooms. They can be the same.
- 7) Click **Submit**. A small window will appear notifying you that the transfer order has been created successfully. Click **OK**.
- 8) If you have not been returned to the parent request, return there now.
- 9) Click the “Transfer Orders” tab on the bottom of the screen.

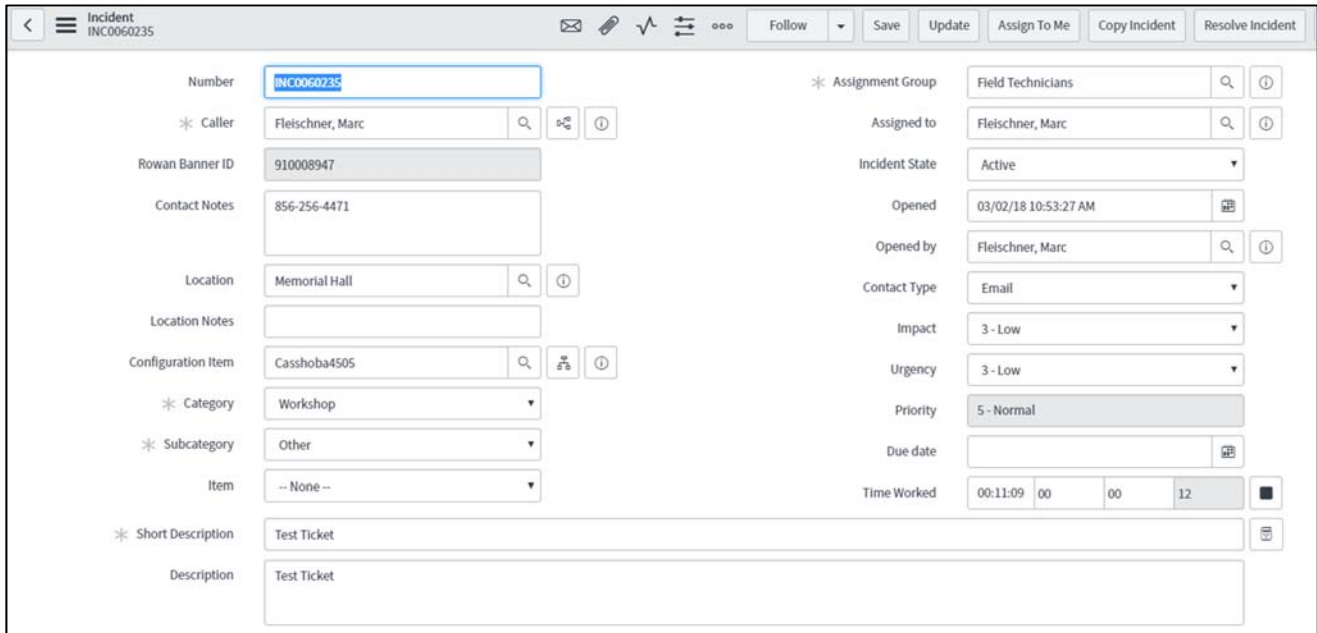
	Number	Stage	Requested date	Delivery by date	From stockroom	From location	To stockroom	To location
<input type="checkbox"/>	T00010001	▶ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○	05/18/17 08:09:13 AM	(empty)	Glassboro	Memorial Hall	Glassboro	Memorial Hall
<input type="checkbox"/>	T00010002	▶ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○	05/18/17 08:09:15 AM	(empty)	Glassboro	Memorial Hall	Glassboro	Memorial Hall

- 10) Open the Transfer Order record by clicking the number (TOxxxxxx) or the (i) icon.
- 11) Click the **“Ready for Fulfillment”** button on the form header. This will update the “Quantity received” field on the “Transfer Order Lines” record.
- 12) Open the Transfer Order Lines item by clicking the number (TOLxxxxxxx) or the (i) icon.
- 13) Open the Asset record by clicking the (i) icon to the right of the Asset field.
- 14) Edit the Asset record as described in “Receiving and Distribution,” step 14.
- 15) Click **“Update”** to save your changes and return to the Transfer Order Line.
- 16) Click **“Update”** to return to the Transfer Order record.
- 17) Click **“Update”** to return to the parent request.
- 18) Select the “Requested Item” tab and complete the configuration process for each item listed as described in “Receiving and Distribution,” step 20.

If the Asset does not have an active catalog item:

In cases where the item does not have an active catalog item, or when replacing an item in operation with an “In Stock” item, you should use the standard incident management process as outlined in the Incident Management Manual. The following process should be used to allocate the new asset, associate it to the incident, and retire the old asset.

1. Update your incident with latest information as outlined in the “Incident Management” guide.



The screenshot displays the Incident Management System interface for incident INC0060235. The form is divided into two main sections. The left section contains fields for: Number (INC0060235), Caller (Fleischner, Marc), Rowan Banner ID (910008947), Contact Notes (856-256-4471), Location (Memorial Hall), Location Notes, Configuration Item (Casshoba4505), Category (Workshop), Subcategory (Other), Item (-- None --), Short Description (Test Ticket), and Description (Test Ticket). The right section contains fields for: Assignment Group (Field Technicians), Assigned to (Fleischner, Marc), Incident State (Active), Opened (03/02/18 10:53:27 AM), Opened by (Fleischner, Marc), Contact Type (Email), Impact (3 - Low), Urgency (3 - Low), Priority (5 - Normal), Due date, and Time Worked (00:11:09 00 00 12). The interface includes a toolbar at the top with buttons for Follow, Save, Update, Assign To Me, Copy Incident, and Resolve Incident.

Once finished, make sure you add the new asset to the Configuration Item field in the incident

2. Attach the user’s current asset to the incident by clicking the hourglass icon next to the “Configuration Item” field.
3. Search for the user’s CI by entering the CI’s name in the “Name” field or the user’s name in the “Owned By” Field. Make sure you remember to use the proper wildcards.
4. Click on the Asset Name to add it to the Incident.
5. Click “**Save**” on the Incident toolbar.
6. Open the CI to view the Configuration Item’s record.
7. Open the Asset record by clicking the (i) icon next to the Asset field.
8. Update the “State” field to the proper status. (In Stock, In Repair, Retired, etc. See “Removing an Asset from Service” for more information)
9. On the Activities tab, add a work note about the action you are taking on the item.
10. Click **Save** to save your changes.
11. Open your Stockroom by navigating to the Stockroom application using your preferred method.
12. Open your Stockroom.
13. Select the Asset from stock that you are allocating to the customer. Make sure that the Serial Number in the asset record matches the item you are allocating.
14. Open the corresponding Asset record.
15. On the “General” tab, update the status of the user to “In Use.” Fill in the “Assigned to” and “Owned By” field.

16. On the Activities tab, add a work note describing the action you are taking on the asset; i.e. *Assigning to J. Doe to replace broken machine.*
17. Make sure to note the CI Name.
18. Click **Update** to return to the Incident Record.
19. Update the CI record to the new item.
20. Click **Save**.
21. Complete the incident as normal using the incident management process.

Asset Module Administration

How to Request a New Hardware Catalog Item

If you have a new product that needs to be added to the catalog, send a request to snquestions@rowan.edu with the subject "New Item for Hardware Catalog." The request will then be reviewed by the Hardware Catalog Administrator.

Working with Vendors and Manufacturers

ServiceNow maintains a list of companies that will be associated with any product being purchased by the organization. Companies may either be vendors, manufacturers or both. i.e. *Logitech* is manufacturer while *GovConnection* is a vendor and *Lenovo* is both.

Companies are maintained in the "Companies" table within ServiceNow. Only Asset Administrators can modify company records. Companies may be modified while working on a specific record in one of the Product Model portfolios.

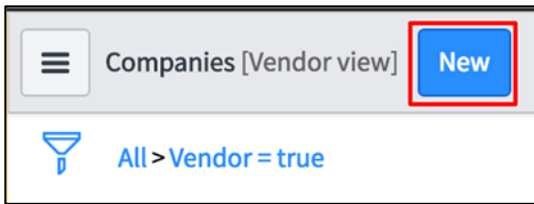
Vendor data is stored in the Companies table and can be accessed by searching for a vendor in the filter bar; or, navigating to it by one of the following:

1. Access the Organization application and then select Vendors.
2. Access the Product Catalog application and then select Catalog Definitions and then Vendors.

Company records can also be added by an Asset Admin from the "Manufacturer" list which is accessible on the "New Record" screen when adding a new record to a Product Catalog Portfolio. When adding the new record, click the magnifying glass next to the "Manufacturer field", and then click **New** in the header of the pick list.

How to Add a Company Record

To add a new vendor, click on the **NEW** button to the right of the Companies menu title. This will launch the Company New Record form. Only Asset Administrators can add a new Company.



1. Fill in the following fields, as applicable:
 - a. Name
 - b. Phone
 - c. Fax phone
 - d. Street
 - e. City
 - f. State/Province
 - g. Zip/Postal Code
 - h. Manufacturer, check if applicable
 - i. Vendor, check if applicable
 - j. Notes

Add New Company Form

2. Click **Submit**. By clicking Submit you will save your record and be returned to the previous screen.

How to Modify a Company Record

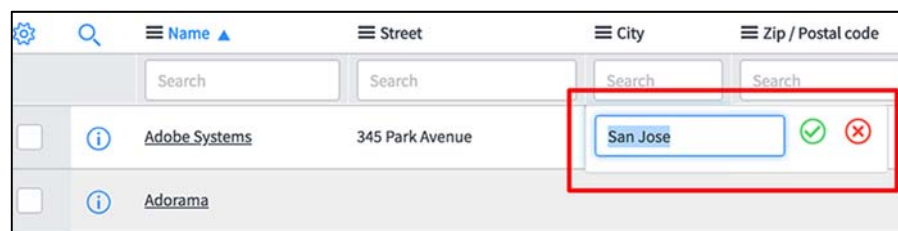
Only Asset Administrators can modify a Company record. To modify an existing vendor, navigate to the Vendor module under the Organization application and locate the vendor that needs updating. Updates can be made in the following ways:

Option 1:

1. Click on the information icon to the left of the vendor name, or the hyperlinked Vendor name to open the form.
2. Make changes and then click on Save or Submit.

Option 2:

1. Search for the vendor and then double click the value in the list that needs to be updated to make the field editable. You will see a green check mark and a red x.



2. Make the necessary changes, then click the green check mark

Working with the Asset and Configuration Management Database

As part of the Procurement process, most items purchased by the University will become recorded Assets. Each item will have two related records, an Asset record, which contains ownership history, financial history and purchasing history and the corresponding Configuration Item record that contains the technical information of the device, such as processor type and speed or operating system.

The Asset Application

Similar to the Product Catalog, the Asset application breaks assets into Portfolios. The two portfolios currently being used by the IRT Asset Management program are Hardware Assets and Consumables. Hardware assets are all technology devices with unique serial numbers that must be tracked as individual items such as computers, printers, or network switches. Each Hardware record contains a "Model category" for the item that defines the type of asset, such as Computer. Consumables are items that do not have serial numbers, or do not need to be tracked, such as USB cables or Ethernet dongles. (See "Finding and Editing an Asset or Configuration Item" for more details).

The Asset Record

The Asset Record contains ownership and financial information about the device.

Hardware
AST0101626 - Lenovo 7827CTO

Display name: AST0101626 - Lenovo 7827CTO

* Model category: Computer

* Model: ThinkPad L420

Configuration Item: memoloan0414.rowanads.rowan.edu

Quantity: 1

General | Financial | Disposal | Depreciation | Contracts | Entitlements | Activities

Asset tag: AST0101626

State: In use

Assigned to: Fleischner, Marc

Rowan status: In Use

Owned by: Fleischner, Marc

Owner Type: Other

Parent:

Comments:

Serial number: LR7PGHV

Substate: -- None --

PO number: P1211537

Location:

Department: Network and System Services

Purchased: 05/24/12

Save | Update | Delete

Related Links
[Delete Asset Only](#)
[Print Asset Label](#)

The Asset Record

There are several important fields on the Asset record:

On the Asset Record:

Display Name - the "Display Name" field is created by service now by combining the asset tag number and the Make and Model of the device. This cannot be modified.

Model Category – The type of device.

On the General tab:

Asset tag – the asset tag number automatically created by ServiceNow.

State – this field shows what state the asset is currently in. States include:

- **On order** – the device has been ordered and has not yet arrived on campus.
- **In stock** – the device is currently in a Stockroom.
- **In transit** – the device is being transported between stockrooms.
- **Consumed** – used for consumable items, the item has been removed from a stockroom.
- **In maintenance** – the device is currently being repaired.
- **Retired** – the device is no longer in service.
- **Missing** – the device cannot be located.

Rowan Status – reflects the legacy status on a record imported from ServiceDesk. This field is read only.

PO Number – reflects the legacy Purchase Order on a record imported from ServiceDesk. This field is read only.

Purchased – reflects the purchase date of an asset imported from ServiceDesk. This field is read only.

On the Financial Tab

Purchase order line – links the item to the original Purchase Order record.

On the Disposal Tab

Retired Date - the date the asset was retired from service.

Printing an Asset Label

To print an asset label, simply click the “**Print Asset Label**” link located in the “Related Links” section of the Asset record. When you click the link, a label will be created in a new browser window. Click **Control-P** on a Windows keyboard, or **Splat-P** on a Mac keyboard to bring up the print screen and select your printer. The labels are currently formatted to work with a Dymo Labelwriter and 30252 labels.

The Configuration Application

The Configuration application contains the Configuration Management Database, or CMDB. Unlike the Asset Application, the CMDB is broken down into individual categories, such as Servers, Tablets, Computers, Printers, etc. Each configuration category contains the items in that category and the records may have some variations.

The CI Record for Computers

The Computer CI Record contains technical information about the device. For most computers this will be auto populated by our discovery tool, SNOW. SNOW updates these records once every week with the following information:

- Domain
- Operating System
- Processor Type, CPU and core count
- Amount of system RAM
- Drive information
- Network Adapter information
- List of installed Software.

Computer Casshoba4505

Name: Casshoba4505

Asset tag: AST0112734

Manufacturer: Lenovo

Asset: AST0112734 - Lenovo 10M850NL00

Cost:

Company:

Serial number: MJ05BJQW

Model ID: 10M850NL00

Assigned to: Fleischner, Marc

Department: Network and System Services

Configuration

OS Domain: ROWANADS

Operating System: Microsoft Windows 10 Enterprise 2016 LTS

OS Service Pack:

Description:

RAM (MB): 8,100

CPU type: Intel Processor

CPU count: 1

CPU core count: 4

Related Items

Update Delete

Related Links

Disks (2) Network Adapters (1) Software Installations (38)

Name	Drive type	Disk space (GB)	Free disk space (GB)	Volume name	Volume serial number
Windows		460			
PLDS DVD-RW DARAESH	DVD Drive				

A Computer CI Record updated by SNOW

Adding to and Updating the CMDB and Asset Databases

There are several methods of adding and updating items in the Asset and CMDB databases, and different records will need to be updated using different methods as part of normal business processes described in this manual.

1. Assets and CIs are created as part of the Procurement receiving processes. (See *Procurement Process*)
2. Computer Asset ownership and technical information is updated via the SNOW plugin. SNOW is a system used by Rowan University that tracks the above information as well as installed software (for software licensing purposes). The SNOW plugin updates these items on a weekly basis. SNOW may also add an item if it is not in either database. SNOW uses a device's serial number to find matches. If a machine's serial number changes (such as if the system board is swapped out), the asset and CI record needs to be updated.
3. Assets are updated manually as part of ongoing processes such as the end of lifecycle process.
4. Other instances that may not be defined here.

Finding and Editing an Asset or Configuration Item

Every item that has technical information in ServiceNow (i.e. Computer, Tablet, Switch) will have two associated records, an Asset Record and a Configuration Item (CI) record. The Asset record contains Ownership, Financial, Disposal, Contract and Entitlement information. The Configuration Item record contains technical information such as CPU type, RAM, Disk Drives, etc. There is some common information shared by both records such as Name, Asset Tag and the person to whom the item is assigned.

To find the asset record you are looking for:

1. Navigate to the Asset application using your preferred method.
2. Open the Asset Portfolio you wish to access by clicking on it in the Application menu. Currently there are several portfolios to choose from:
 - Consumables: These are items such as paper and toner cartridges. We will not be using this portfolio until a future ServiceNow development phase.
 - License Assets: These are any licenses used by the University, mostly relating to Software. We will not be using this portfolio until a future ServiceNow development phase.
 - Hardware Assets: These are all types of computing Hardware including Computers, Printers, Tablets, Access Points, and Switches. Phase 1 includes all items in the Computer, Printer and Tablet categories.
3. If the search fields are not visible under the column names, click the magnifying glass on the list header.
4. You can search based on any of the listed criteria. Most commonly, it will be the item's name (Configuration Item column), user (Assigned to column) or Serial Number.
5. Type all or part of the term you are searching for to narrow the list of items. Make sure to use a wildcard (*) if you are only entering part of the item's information.
6. Click on the (i) icon or the hyperlinked number in the "Asset Tag" column to open the item once you have found it.
7. You may now make changes to the asset record. Once you have completed your edits, click **Save** or **Update** to save your changes.
8. To view or update the corresponding CI record, click on the tombstone (the (i) icon) next to the Configuration Item field.

To find the Configuration Item you are looking for:

1. Navigate to the Configuration application using your preferred method.
2. Select the CMDB Category for the item you are looking for. Computers and Printers can be found under "Base Items."
3. If the Search fields are not visible under the column names, click the magnifying glass on the list header.
4. You can search based on any of the listed criteria. Most commonly, it will be the item's name (Configuration Item column), user (Assigned to column) or Serial Number.
5. Type all or part of the term you are searching for to narrow the list of items. Make sure to use a wildcard (*) if you are only entering part of the item's information.

6. Click on the (i) icon or hyperlinked field in the first column of the list to open the item. Clicking on the Asset name will open the Asset record.
7. You may now make changes to the CI record. Once you have completed your edits, click **Save** or **Update** to save your changes.
8. To view or update the corresponding Asset record, click on the tombstone (the (i) icon) next to the “Asset” field.

Manually Adding an Asset

1. Navigate to the Asset application using your preferred method.
2. From the list, select the Asset portfolio that you wish to add an asset to. It will probably be the Hardware Asset portfolio.
3. On the top header, click **New**.
4. Select the “Model Category” of the item you are creating, and then select the “Model.” It is very important that you select the proper model category so that the CI record will be created in the proper place.
5. The “Asset Tag” field will be automatically filled in and the “State” will be set to “In Use” by default. Update the “State” field if needed, such as if the item will be going into a Stockroom.
6. On the “General” tab, fill out the following additional information:
 - a. Assigned To - Who the item is actually going to.
 - b. Owned By - Same as the assigned to.
 - c. Owner Type – This signifies the position of the owner and their eligibility for replacement cycle machines.
 - d. Parent – Use if the item is associated with another device, such as a monitor to a computer.
 - e. Serial Number
 - f. Location – Building the machine is initially going to be used in.
 - g. Department – The department of the “Assigned To” user. (This should be auto filled)
 - h. Purchase Date – Date of purchase.
 - i. Install Date - Date of installation;
7. The following fields should **NOT** be updated:
 - a. Rowan Status
 - b. PO Number
8. Click on the “Financial” tab and update the “Cost” field if needed.
9. Click **Save** on the top toolbar.
10. Click the (i) icon next to the “Configuration Item” field.
11. While some information, such as Asset Tag, Serial Number and Assigned to, carries over from the Asset Record, no technical information is filled in. Enter any information that is applicable. Please note that technical information for a computer asset will be automatically updated weekly via the Snow tool.
12. Once you have finished filling in any relevant information, click **Update** and you will be returned to the Asset record.
13. If a label is needed, click the “**Print Asset Label**” link under the “Related Links” section of the form.

Removing an Asset from Service

When an Asset is removed from service, it is vital that the Asset Record is updated to ensure accuracy of the Asset and Configuration Databases. Be sure to remove the hard drive before updating the record. To remove an item from service:

- 1) Navigate to the Asset application using your preferred method.
- 2) Open the proper portfolio, usually "Hardware Assets."
- 3) Search for the Asset by the "Assigned To" or "Serial Number" column (you may need to add the Serial Number column).
- 4) Open the Asset Record by clicking on the (i) icon or the number in the "Asset tag" column.
- 5) Open the Configuration Item record by clicking the (i) icon next to the "Configuration Item" field.
- 6) Select the "Disks" tab at the bottom of the record and open the C: record for the hard drive you pulled from the system.
- 7) Enter the drive serial number in the "Serial Number" field.
- 8) Click "**Update**" to return to the CI record.
- 9) Return to the Asset record by clicking the (i) icon next to the Asset field.
- 10) On the "General" tab, change the asset state to "Retired."
- 11) Click "**Save**."
- 12) Select the "Disposal" tab.
- 13) Enter a reason for disposal in the "Disposal Reason" field. Notice that the "Retired Date" field has the current date entered. This is automatically populated when the state was set to "Retired."
- 14) Click **Update** to save your changes.

A Note on Consumable Assets

Consumable items only utilize two asset states, "In stock" and "Consumed." To move a consumable out of stock:

1. Navigate to the Asset application.
2. Open the Consumables portfolio.
3. Alternatively, navigate to the Stockrooms application, open your Stockroom and click on the "Consumables" tab.
4. Open the record for the consumable.
5. Click the "**Consume**" button on the form header.
6. Enter the quantity of the consumable you are using, and either the user or asset name of the recipient.
7. Click **OK**.
8. You will be turned to the consumable record with the updated quantity.

Stockrooms

ServiceNow utilizes stockrooms for keeping track of assets in storage. These might be bulk purchases, such as replacement cycle machines, or an individual purchase before it has been deployed. Each department that maintains a hardware inventory will have a unique Stockroom created for them.

Any time an item is received from a Purchase Order, it will be placed in an “In Stock” state in the Stockroom designated on the Purchase Order before being assigned to an individual user.

Each Stockroom will have a designated manager who is responsible for maintaining and reconciling the inventory in their assigned Stockroom.

How to Perform Monthly Inventory

On the first of each month, a Task will be created for each Stockroom Manager that has items listed as “In Stock.” If there are no “In Stock” items, no task will be generated.

To locate the task, click on “My Work” in the “Service Desk” application. Here, all tasks assigned to you will be listed. Open the Task with the Short Description of “Monthly Inventory” by clicking on the Task number or the tombstone (the (i) icon).

	PO number	Display name	Substate	Asset tag	Quantity
<input type="checkbox"/>	P1312776	Lenovo ThinkPad X1 Carbon 4th Gen	Available		1
<input type="checkbox"/>	(empty)	Apple MacBook Pro 13 w/ Retina Display	Reserved	nr1232323	1
<input type="checkbox"/>	(empty)	Lenovo X1 Yoga 1st Gen	Reserved	NR12312312	1

Data Certification Screen

On the Data Certification screen, click the checkbox to the left of the asset tag that you have verified, and then click the green check mark icon at the top of the window.

For items that you cannot locate, select the checkbox to the left of the record, enter a description in the box next to the green checkmark and then click the red exclamation point icon.

For item displaying an error, such as the missing asset tag for the item in the image above, click the checkbox next to the item, enter a description in the box next to the green checkmark and then click the red Exclamation point icon.

Once you have completed reviewing the items in inventory, click “**Save**” in the bottom left of the window. Once all items have been reconciled, set the task status to “Closed Complete.”

The Product Catalog

ServiceNow utilizes a Product Catalog to maintain the list of products in the Asset and Configuration Databases. The Product Catalog defines all items that become assets in the ServiceNow system. Only Asset Administrators will have access to modify the product catalog. The Product Catalog is broken down into portfolios such as Hardware, Consumable, Facility, etc.

IRT utilizes the following Model portfolios:

Hardware Models: All IT related computing devices such as computers, printers, servers, etc. that are individually tracked and usually have unique serial numbers.

Consumable Models: IT related computing device that are not tracked individually, such as keyboards or printer toner.

Bundled Models: Bundled models are groups of existing products that are related and deployed as a set. An example is a "Staff PC" which includes a specific desktop computer and specific monitor.

Software Model: Individual software packages within the environment, such as Microsoft Office or SPSS.

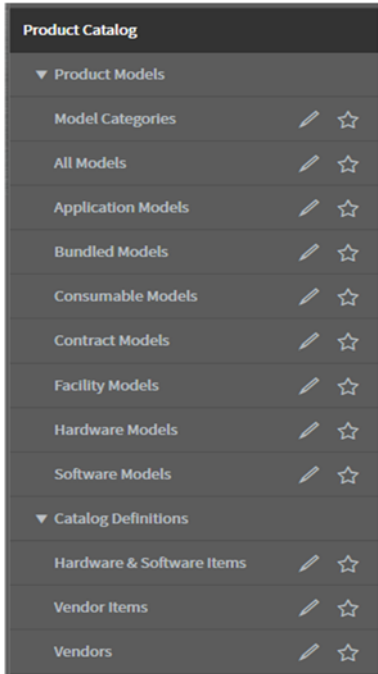
Other Model categories currently not utilized by IRT include Contract and Facility Models.

New models that need to be added to the catalog will be identified as part of the ordering process. However, if you need to have a new model added manually to the catalog, please send an incident request to snquestions@rowan.edu and it will be assigned to the Asset Administrators for review. Please include:

- Name of the Model
- The Manufacturer
- Cost
- Model Number if not part of the model name.
- The type of device (computer, printer, security camera, etc.)
- If you are required to track individual items of this type (this is needed to determine the proper type of model, i.e. Hardware vs. Consumable)

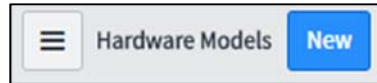
Once an Asset Administrator reviews the request they will notify the user that the item has been added via the incident in ServiceNow.

How to Add a Model to the Product Catalog (Asset Admins Only)

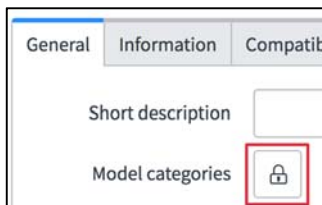


Product Catalog Menu

- Navigate to the Product Catalog application using your preferred method.
- Click on the “Model Category” you are adding the model to. You will be taken to a list of all models within the category. For example, if it is a Lenovo Laptop select “Hardware Models” or a Star Tech USB C Cable select “Consumables.”
- Before adding a new model, verify that the model has not been created by searching the asset model portfolio for the item. If the item exists notify the requester that the item is in the system, along with the model name of the item.
- To add the model, click **New** next in the top toolbar.



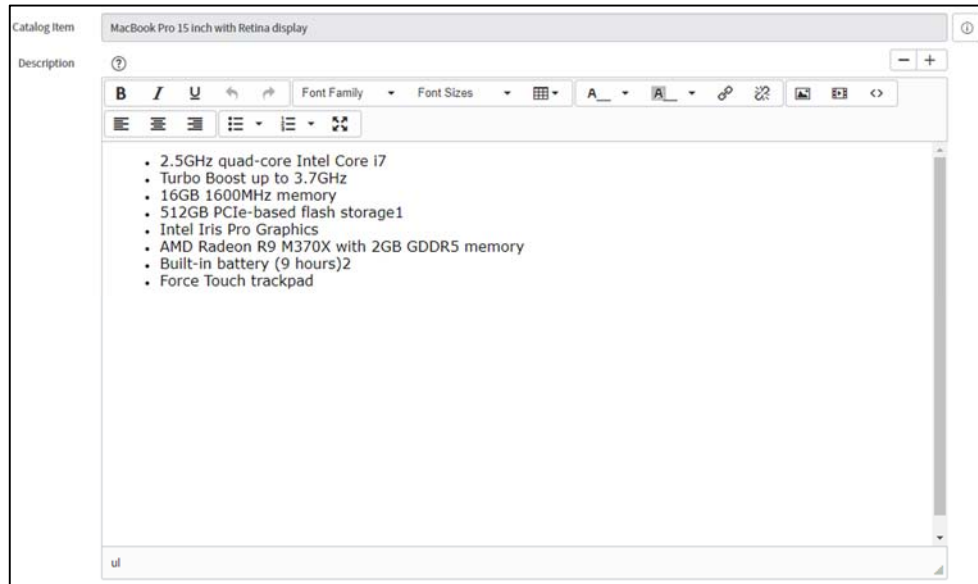
- The New Record form will open. Fill out the following fields:
 - Manufacturer - The name of the company that makes the item. It should be in the selected list. If the manufacturer does not exist then add the manufacturer (See updating Vendors and Manufacturers.)
 - Model – Enter the name of the model you are creating. This should be the common name of the item, such as ThinkPad X1 Carbon or LaserJet P2035.
 - Short Description – The short description is made up of the Manufacturer Name and the Model Name (i.e. Lenovo ThinkPad X1 Carbon or Hewlett Packard LaserJet P2035).
 - Model Number – This should be the manufacturer’s part number, such as 0829CTO or VS240 (Note – in some cases the model number will be part of the model name).
 - For Hardware Models, add a model category by clicking on the lock icon next to the “Model Categories” field on the “General” tab to open the categories selection box.



Select the magnifying glass icon and choose a category for the item from the resulting list - i.e. Computer, Printer, Server, etc.

- If the item will be regularly purchased and is going to be delivered to the customer, select the “Deliver to Customer” checkbox so that the proper Procurement work order is run.

- If you are not planning on adding this item to the Hardware Catalog (to publish in the portal), click **Save** and then notify the user that the item has been created.
- If you are planning on publishing this item to the Hardware Catalog:
 - i. Select the “Product Catalog” tab. Use the editor to create the information you want presented in the Hardware Catalog. This should include a brief description of the item and/or a bulleted list of configuration details. Do not add any graphics at this time.



The Product Catalog tab on a Hardware Model to be published to the Portal

- ii. Click **Save** to save the record (do not click Update).
- iii. Under “Related Links” in blue will now be a “Publish to Hardware Catalog” item. Click this link. The “Publish to Hardware Catalog” form will appear.
- iv. Click the magnifying glass or start typing the category and select the item in the auto-complete drop-down list.
- v. If you need to create a category, click the magnifying glass and then click new. (See “How to add a Category to the Hardware Catalog” for more information.)



Publish to Hardware Catalog Form

- vi. Click **Save** or **Update** to save the record.
- vii. Notify the requestor of the name of the Model that has been created.

Maintaining Model Categories (Asset Admins Only)

Model Categories are the high-level descriptors for items in the CMDB and Asset portfolios. These should only be changed by the Asset Management program administrator.

1. Use your preferred method to navigate to the Product Catalog.
2. Select “Model Categories.”
3. Click **New**.
4. Enter the name of the new Category.
5. From the dropdown boxes, select the appropriate CI Class and Asset Class.
NOTE: These fields must be selected for proper mapping of CI’s to Asset, however, they may not be applicable in all cases (i.e. consumables).
6. Select any applicable options.
7. Click **Save**.

Catalog Maintenance

Catalog Maintenance will be performed regularly by the Catalog Administrator. Catalog Maintenance tasks include:

- Review current items for continued availability.
- Retire items no longer available.
- Update pricing of items listed in the catalog.
- Add new items that are being made available.

The Hardware Catalog

A core function of ServiceNow is the portal for all consumers of services to place orders, known as the Service Catalog. A subset of the Service Catalog is the Hardware Catalog. The Hardware Catalog contains all hardware items available for purchase by the Rowan community. Products categories included are:

- Accessories – Items such as Docking Stations, Mice, Keyboards, Cables, Adaptors, etc.
- Desktops – Desktop computers
- Laptops – Laptop computers
- Monitors
- Printers
- Tablets

Categories must be created before adding items to the Hardware Catalog. These categories may change as the products we offer change.

Maintaining the Hardware Catalog in the Portal

Maintaining the Hardware Catalog in the portal requires working in two areas, the Hardware Catalog and the Product Catalog. The Hardware Catalog is a subset of the Service Catalog devoted exclusively to hardware assets. The Product Catalog defines all items that become assets in the ServiceNow system. To add an item to the portal, it must first be created in the Product Catalog.

Adding Items to the Portal:

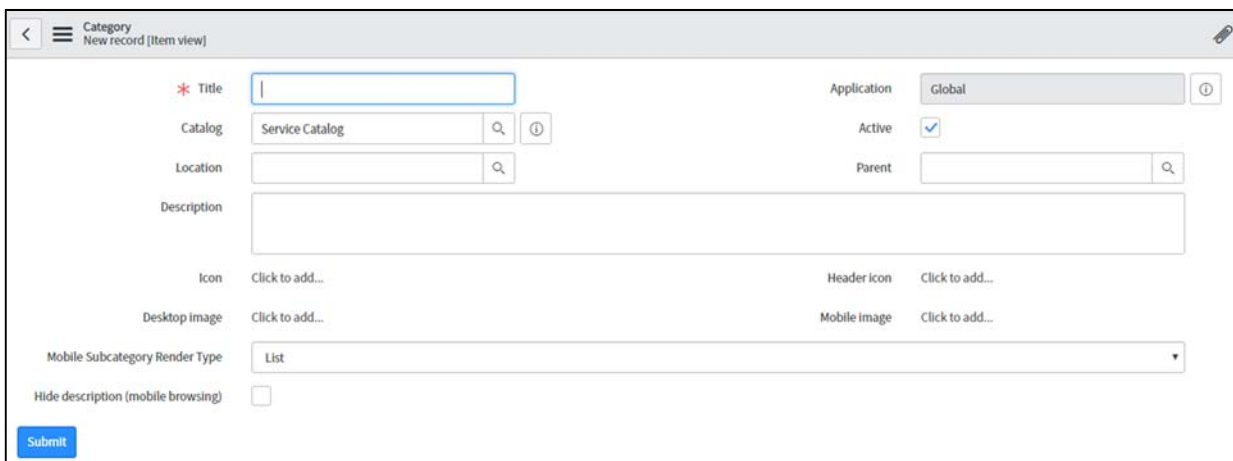
1. Create a Category in the Hardware Catalog (if needed).
2. Add the Item to Product Catalog.
3. Publish to the Hardware Catalog.
4. Finalize.

How to add a Category to the Hardware Catalog (Catalog Admins Only)

To create a new category for the hardware catalog:

1. Navigate to the Service Catalog application using your preferred method.
2. Under “Catalog Definitions” select “**Maintain Categories.**” Make sure you do NOT click “Maintain Catalogs”!!!!
3. The full Categories list will appear.
4. Click **New** on the top toolbar.
5. On the New Record form, only fill out the following fields. Leave the other fields as they are:
 - a. Title – The name of the new category.
 - b. Description – Describe what type of items should go into the new category.
 - c. Parent – If the category is a subcategory of an existing category, add it here. All items for the Hardware Catalog should have a parent i.e. Laptops has a parent of Hardware, Mice has a parent of Accessories.
6. Click **Submit** to save your category.

Your category has been created but will not show in the Service Portal until you add items to that category.

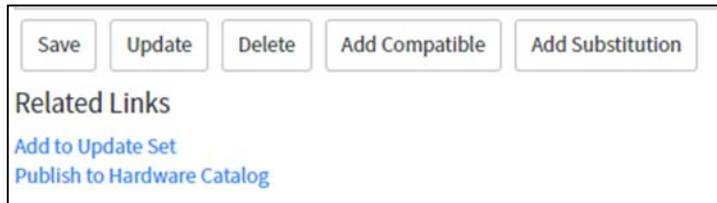


The Add New Category Form

How to Publish an Item to the Hardware Catalog (Catalog Admins only)

Follow these steps to make a new item available in the hardware catalog:

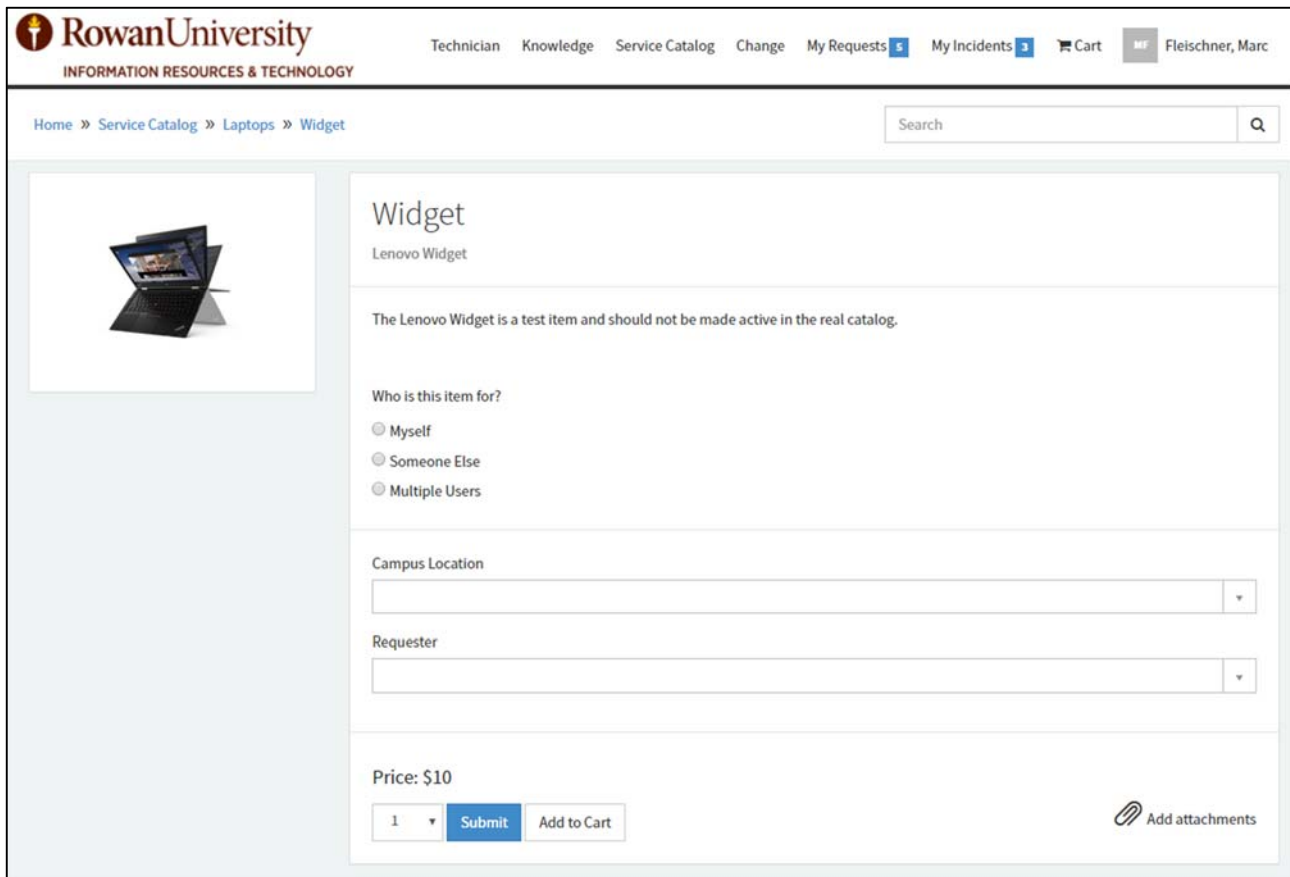
1. Add the new item to the Product Catalog. See “How to Add a Model to the Product Catalog” for instructions.
2. Once the item is saved, the “Publish to Hardware Catalog” link will appear under the “Related Links” section of the form. **Click this link.**



Publish to Hardware Catalog Link

3. In the “Publish to Hardware Catalog” dialog box, select the catalog where the item should appear and click **OK**. i.e. Laptop, Cables and Adapters
4. You will be taken to the Hardware Catalog form for the item.
5. In the Workflow field, select “**Procurement Process Flow – Hardware.**”
6. In the “Subwidget” field, select “RU Hardware Cat Item.”
7. Click the “Images” tab in the center of the form.
8. To add a picture of your item, make sure you have the image file saved locally on your computer. Once saved locally, select the “**Click to add . . .**” link next to “Picture.” Click the “**Choose File**” button on the “Choose an image file” screen.
9. Select the image file and click **Open**. Click **OK** on the “Choose an image file” screen. You will be returned to the Hardware Catalog form and the picture will appear on the tab.
10. Click on the Options tab and make sure the following items have been checked:
 - a. No Submit
 - b. No Order
 - c. No Order Now
11. Click on the “Variable Sets” tab on the bottom right of the form.

Variable sets allow a group of pre-defined variables to be used across multiple catalog items. Individual variables are unique to the catalog item.
12. Click the “**Edit...**” button on the Variable Sets toolbar. You will be taken to the “Edit Members” screen.
13. On the “Edit Members” Screen, double-click “**Hardware CI Variable Set**” to add it to the right side of the screen, and then click **Save**.
14. In a second browser window, open the ServiceNow portal by going to support.rowan.edu/sp.
15. Navigate to the item by clicking “**Request Something**” and then clicking “**Hardware.**”
16. Click on the category you just added the item to, and then click the item to view the form.



A Completed Catalog Item

The Hardware Catalog Administrator should be reviewing the products available in the hardware catalog on minimally a quarterly basis.

Editing an Item in the Hardware Catalog (Catalog Admins Only)

If you wish to update the viewable text of an item on the portal:

1. Navigate to the Product Catalog application using your preferred method.
2. Click on “**All Models,**” or the portfolio category containing the item you want to edit.
3. Search for the item and then open the item form by clicking the created date or the information icon.
4. Select the “Product Catalog” tab.
5. Modify the description as needed.
6. Click **Update**.
7. Open the item you have modified in the support catalog (support.rowan.edu/sp) to verify your changes.

To edit a current catalog item’s properties or image:

1. Navigate to the Service Catalog application using your preferred method.
2. Select “**Maintain Items**” under “Catalog Definitions.”
3. Search for the item you want to modify.
4. Click on the item’s **Name** to open the item.

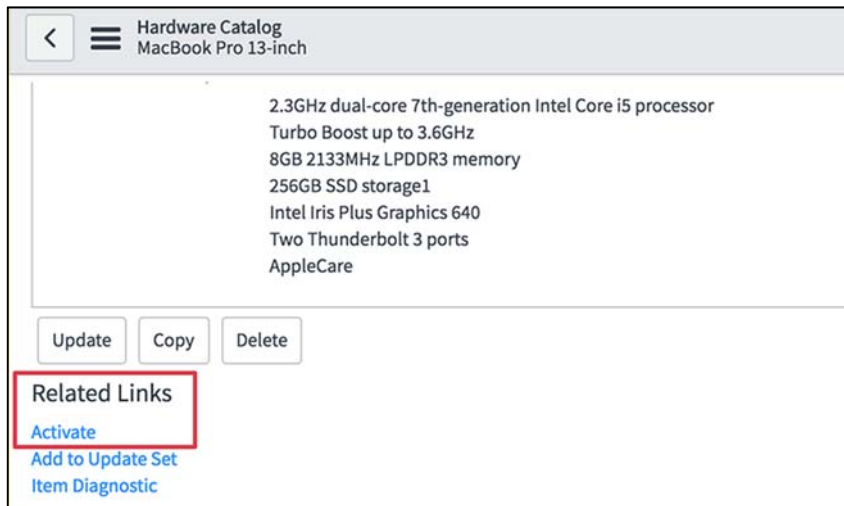
5. Modify the properties on the form as needed. Be sure not to change the workflow, subwidget or cart options.
6. Click **Update** to save your changes.
7. Open the item you have modified in the support catalog (support.rowan.edu/sp) to verify your changes.

Removing an Item from the Hardware Catalog (Catalog Admins Only)

When an item is no longer needed, it should be deactivated from the catalog. No items should ever be deleted from the Product or Service catalog. Deleting the items will create issues with records of those item types that have been created in the asset database.

To deactivate an item in the portal:

1. Navigate to the Service Catalog application using your preferred method.
2. Select “**Maintain Items**” under “Catalog Definitions.”
3. Search for the item to be deactivated.
4. Scroll down the form to find the “Related Links” section.
5. Click the “**Deactivate**” link. Note that it changes to Activate.



6. Open the portal at support.rowan.edu/sp to verify that the item has been deactivated.