ServiceNow (SNOW) User Guide for Procurement

Procure to Pay Query Resolution

Introduction

ServiceNow is an online service request system used by Vantive to connect with and support internal users and suppliers who may have service requests or questions relating to procurement processes and activities. This tool allows users to create cases, track service requests, attach documents, and resolve issues with the procurement team.

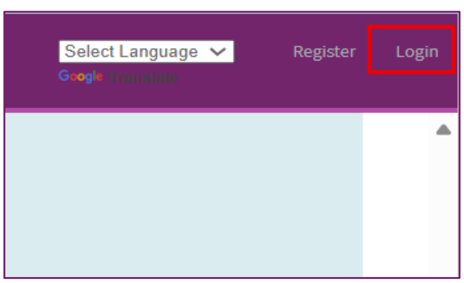
This user guide provides an overview of the ServiceNow user interface and covers how to report an issue, request a service, check the status of a service request, approve or reject a request.

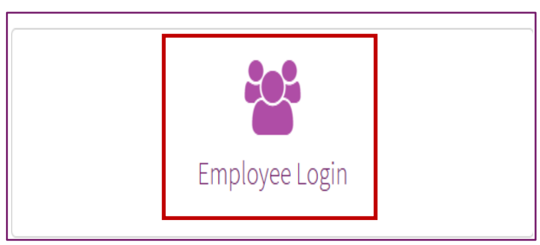
ServiceNow User Guide Purpose

The main purpose of this user guide is to introduce Vantive users to the general functions and features of the Procurement ServiceNow process. That is, how Vantive employees can use the SNOW platform to submit service requests.

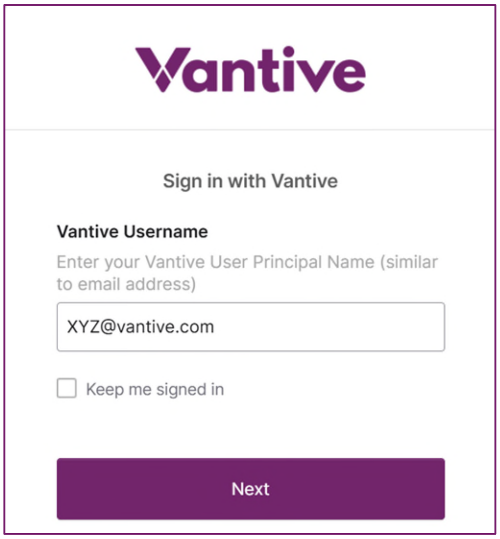
To Log on to ServiceNow

1. Open a browser and go to https://vantive.service-now.com/csm
2. In the home page, click on ‘**Login**’ and select ‘**Employee Login’**



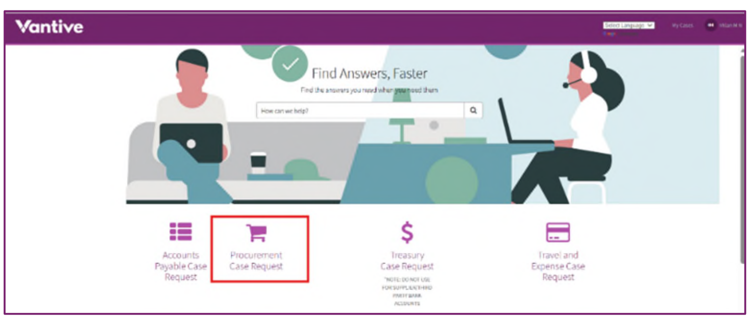


3. On the ServiceNow Login Page, enter your **"Vantive Email ID"** and **"Vantive Password"** in the corresponding fields, and then click the **"NEXT"** button.

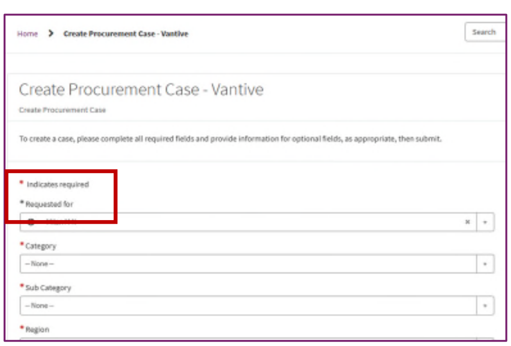


How to create a Service Request

1. Click "**Procurement Case Request**."

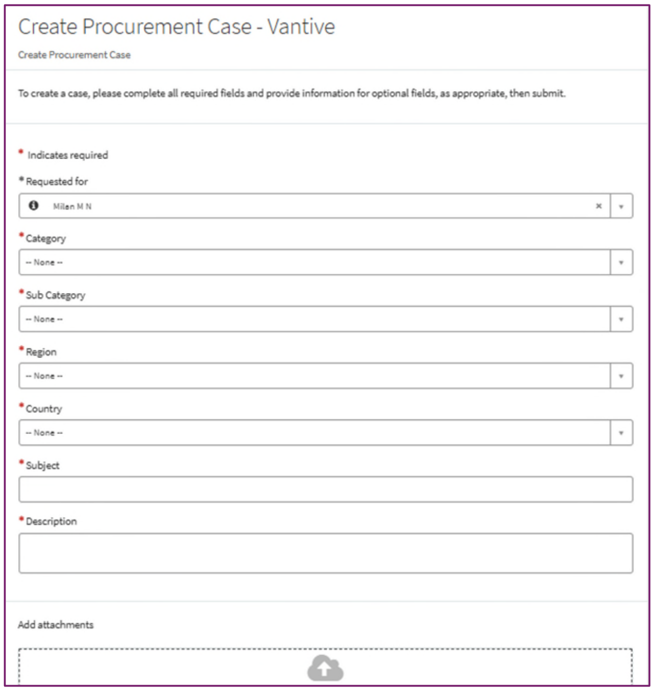


This will open the ServiceNow intake form - the requestor name will automatically populate in the default **"Requested For"** field.



Note: If you are opening a service request on behalf of another employee, you should remove your name and add theirs.

To complete the service request, finish by entering the required information below. Add attachments if required.


Create Procurement Case - Vantive

Create Procurement Case

To create a case, please complete all required fields and provide information for optional fields, as appropriate, then submit.

* Indicates required

*Requested for

Milan M N

*Category

-- None --

*Sub Category

-- None --

*Region

-- None --

*Country

-- None --

*Subject

*Description

Add attachments

Requested For: This is the field to enter the name of the person who wants the service request. It can be you or someone else in the Vantive organization.

Category: This field describes the main area in which your issue or question needs to be addressed.

Subcategory: This field allows you to narrow down the topic in which you will need support.

Region: Select the region where the requestor is based. There are four Vantive regions to choose from: North America (UCAN), Latin America (LATAM), Europe, Africa, and Middle East (EMEA) and Asia Pacific (APAC).

Country: Select the country where the requester is located.

Subject: Enter a brief description of the issue or question the requestor has.

Description: Use the description field to add a more detailed explanation of what is needed and problems that need to be resolved.

Best Practice: When writing a brief description, it is important to be clear and concise while providing enough information to convey the necessary details. Be specific, use direct language, include relevant details about the issue, and avoid non-value details that can distract the responder from the root problem you want solved.

Attachments: Sometimes, supporting documentation is required. Use the "**paperclip**" icon to '**Add attachments'** to the service request. Documents that might be added may include screenshots, letters. emails or other information a responder may need to solve your issue. To add the attachment, choose the file from your computer, drag and drop the file from your desktop or copy and paste it. The file will then be attached to service request.

Note: Not every submission requires an attachment.

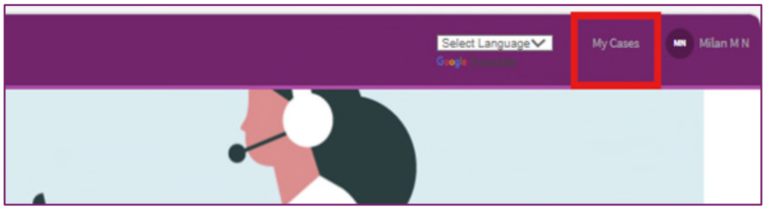
Submit: Once all fields are completed in the intake form, click '**Submit**

After clicking submit, a **Service Request case number** is generated. All case numbers generated by CSM will start with "**FIN**" and emails generated from the CSM portal come from "CSM Finance."

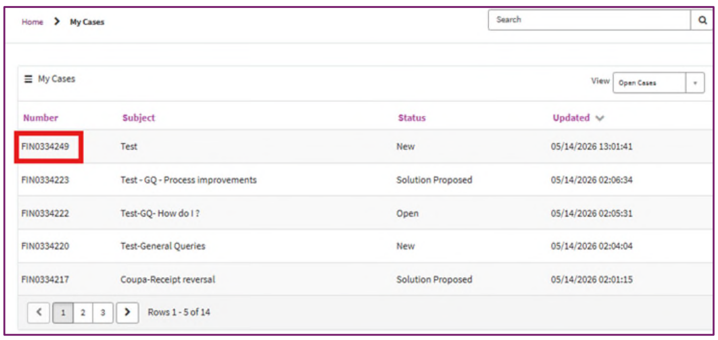
Note: Attachments are part of the service request once added. Always double check the file before submitting to ensure the correct file has been added. Also, when starting a new service request from a previous, unsubmitted intake form, be sure to remove any old attachments before submission.

How to track a Service Request

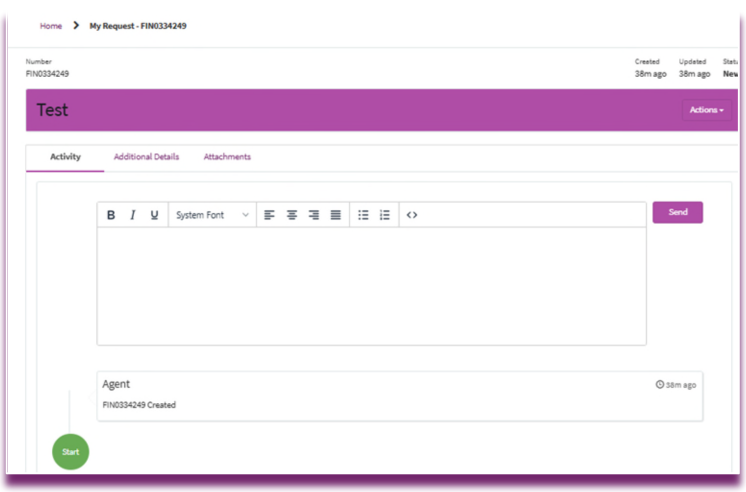
1. To track the **Service Request,** click on ServiceNow home page and click on “**My Cases.**”



2. Select the Service Request you want to track by clicking on the Service Request.

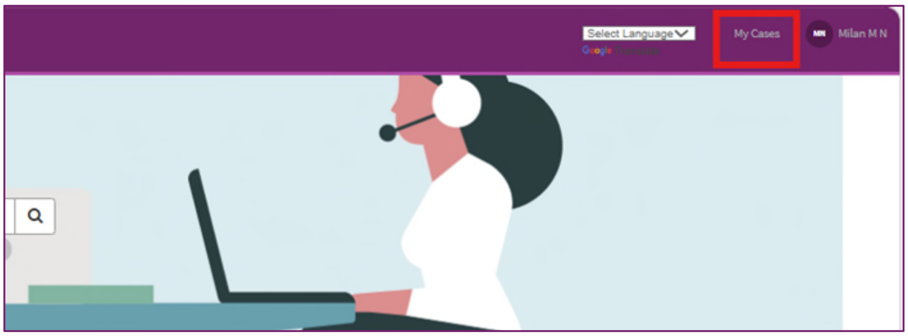


3. You will see the details and status of the Service Request.

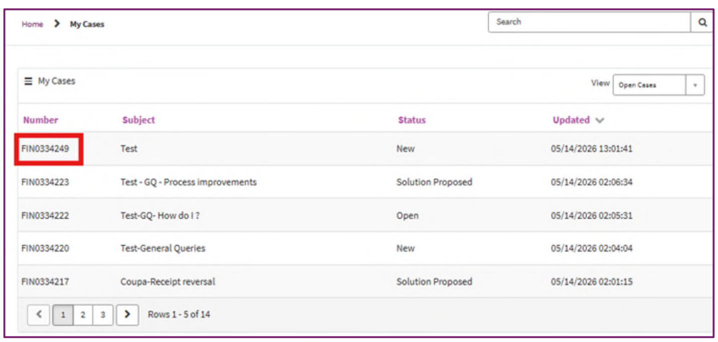


How to update a Service Request

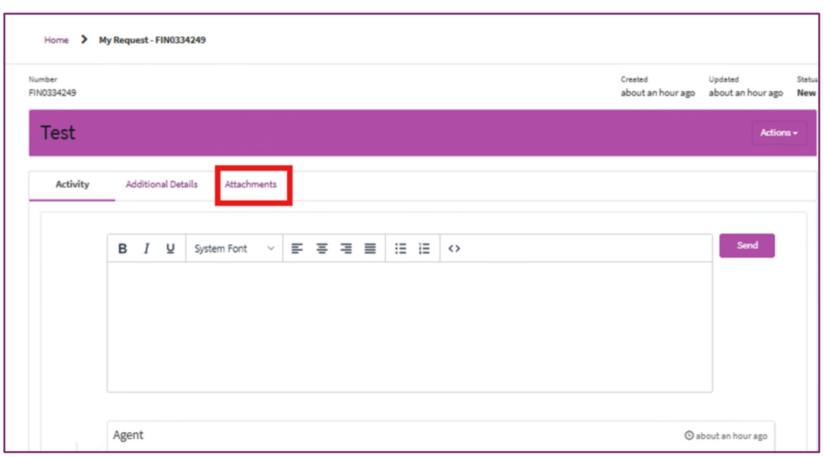
1. To update the Service Request, click on ServiceNow home page and click on "**My Cases**."



2. Select the Service Request you want to update by clicking on the Service Request.

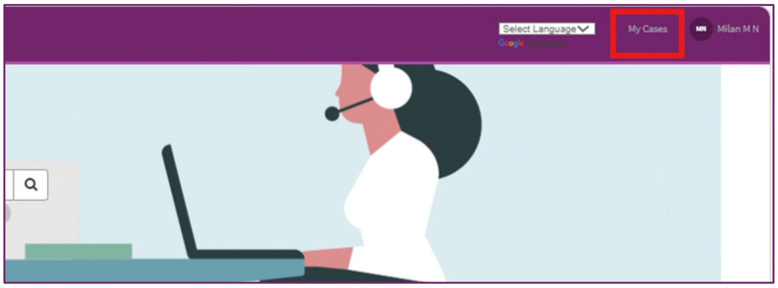


3. Enter the details into the text box and if you want to add an attachment then click on **attachments**, upload, and **send**.

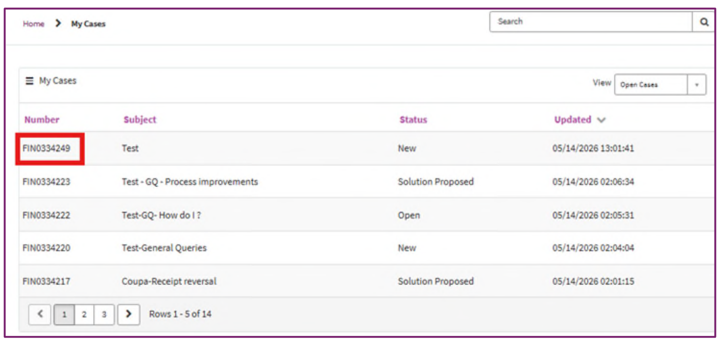


How to escalate a Service Request

1. To escalate the Service request, click on ServiceNow home page and click on “**My Cases**.”



2. Select the Service request you want to escalate by clicking on the Service request



3. Click “**Actions**” and select “**Escalate**”

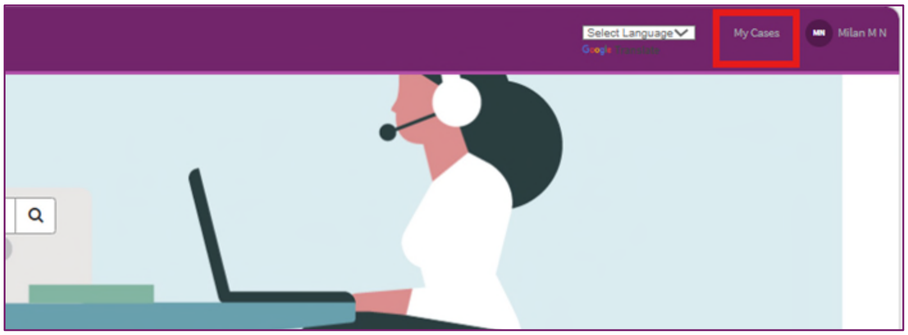
Click on “**Reason**” drop down and select the **Reason type** and provide the “**Justification for escalation”** and click on **“Escalate.”**

Note: The ticket can be escalated only after 2 days of creation

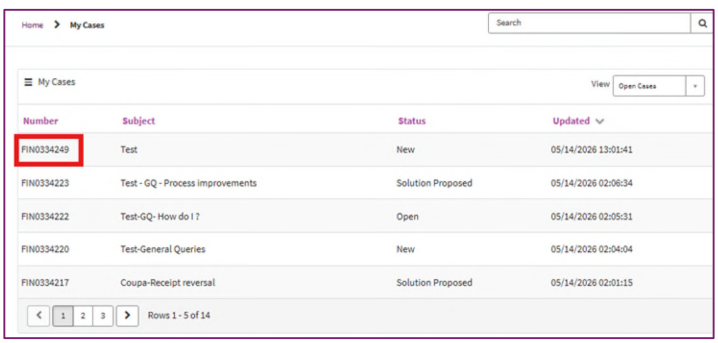
How to accept or reject a proposal

Once the agent has actioned the Service request and proposed a solution, user will receive an automated email.
Users can either click the link as provided in the email or follow the navigation steps outlined in the below.

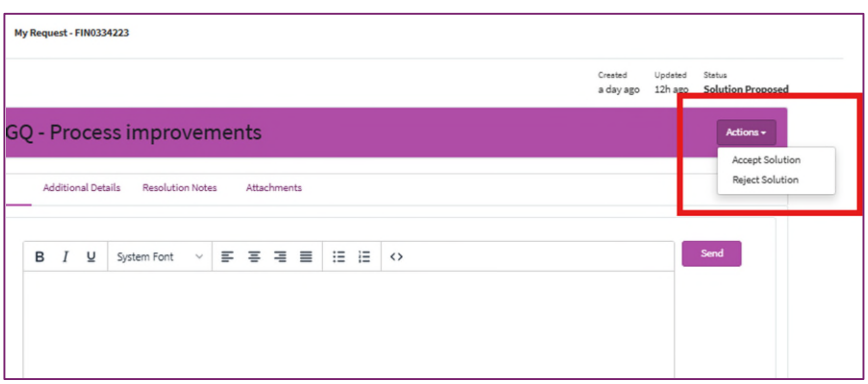
1. To **Accept** or **Reject** the Service request, click on ServiceNow home page and click on "**My Cases**."



2. Select the Service request you want to **Accept** OR **Reject** by clicking on the Service request.



3. Check and confirm the Service Request has been resolved by Selecting "**Accept Solution**" your Service Request will be closed.



4. If the requested issue is not resolved, select "**Reject Solution**", your Service Request will be re-opened.