ServiceNow

Procurement Service Request Guide

Introduction

ServiceNow is an online service request system for internal users and suppliers who may have a query relating to Procurement processes and activities. This tool allows users to create cases, track tickets, attach documents, and resolve issues with the procurement team.

The Procurement Experience Desk team at Vantive manages the ServiceNow platform for Procurement with the goal of improving response times, ensuring smooth operations, and maintaining high levels of service quality across various functions within procurement support.

This Supplier 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 Suppliers to the general functions and features of the Procurement ServiceNow process. That is, how Vantive Suppliers can use the SNOW platform to submit a service request.

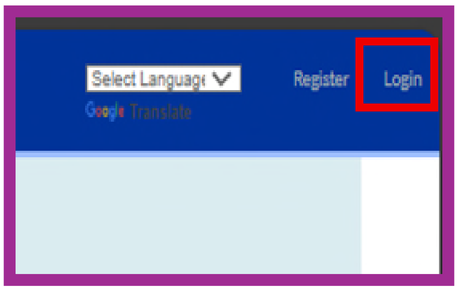
ServiceNow Overview & Navigation

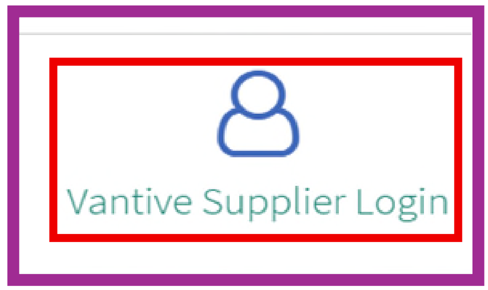
1. How to create a service request
2. How to track a service request
3. How to update a service request
4. How to escalate a service request
5. How to ‘**Accept’** or ‘**Reject’** the Proposal

To Log in to ServiceNow

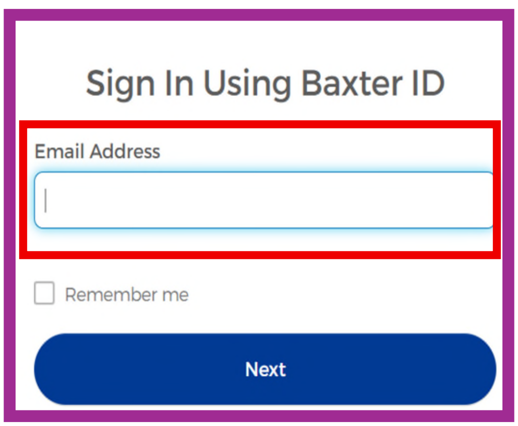
1. Open a browser and go to https://baxter.service-now.com/csm

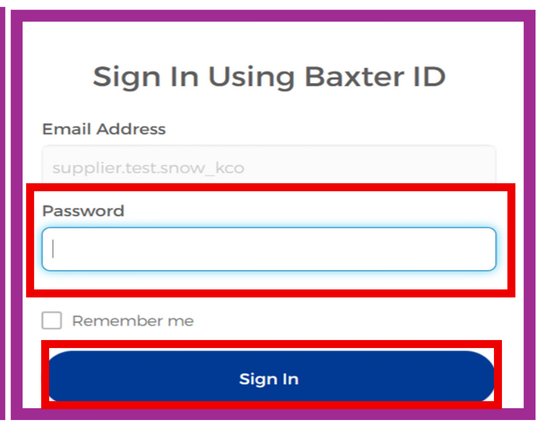
2. On the home page, click ‘**Login**’ and select ‘**Vantive Supplier Login’**





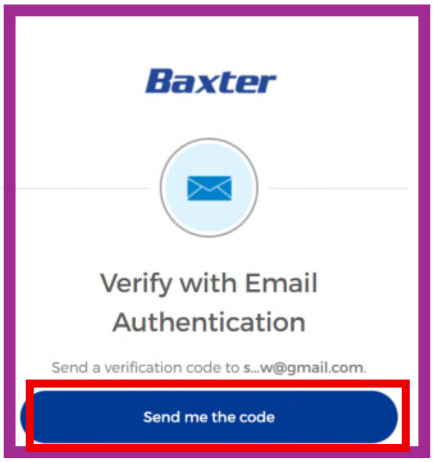
3. Enter your “**Email Address”** and **Password** in the corresponding fields, and then click the **Sign In** button to continue.

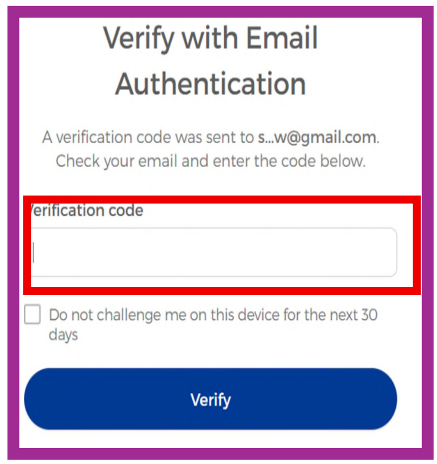


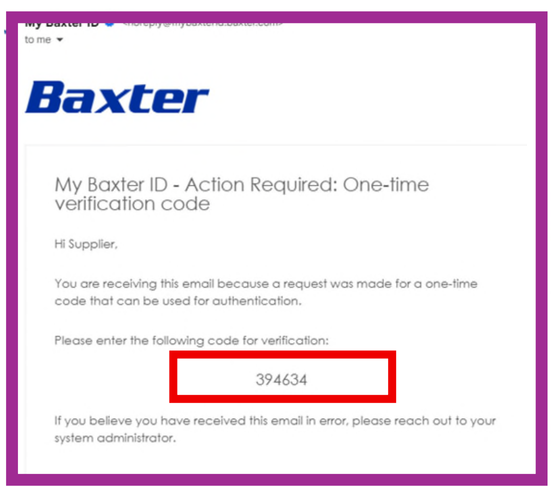


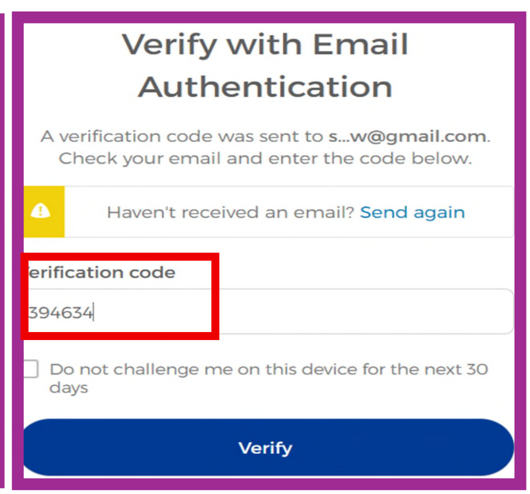
4. Click on ‘**Send me the code**’ and you will receive an email with the verification code, enter in the ‘**Verification Code**’ field and click on “**Verify.**”

   <u>**Note**</u>: Authentication verify depends on supplier choice – (**Okta Verify** - **Google Authenticator, SMS Authentication Voice Call Authentication)**



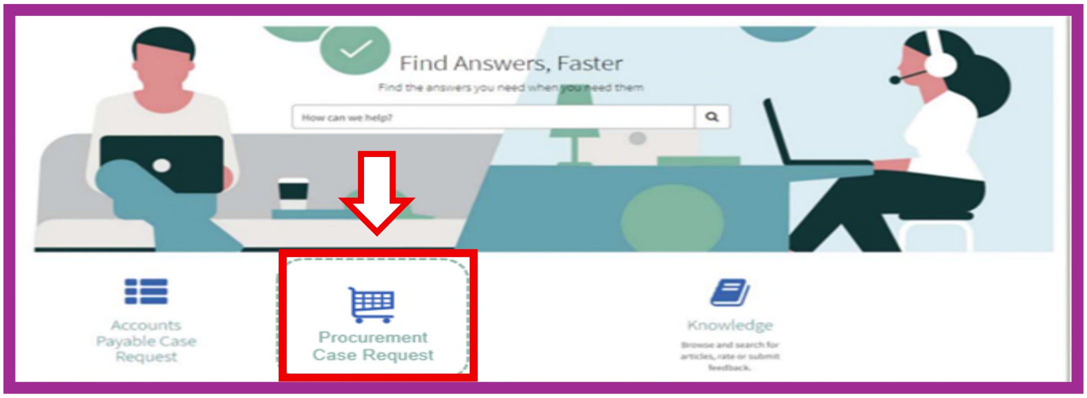






➢ HOW TO CREATE A SERVICE REQUEST

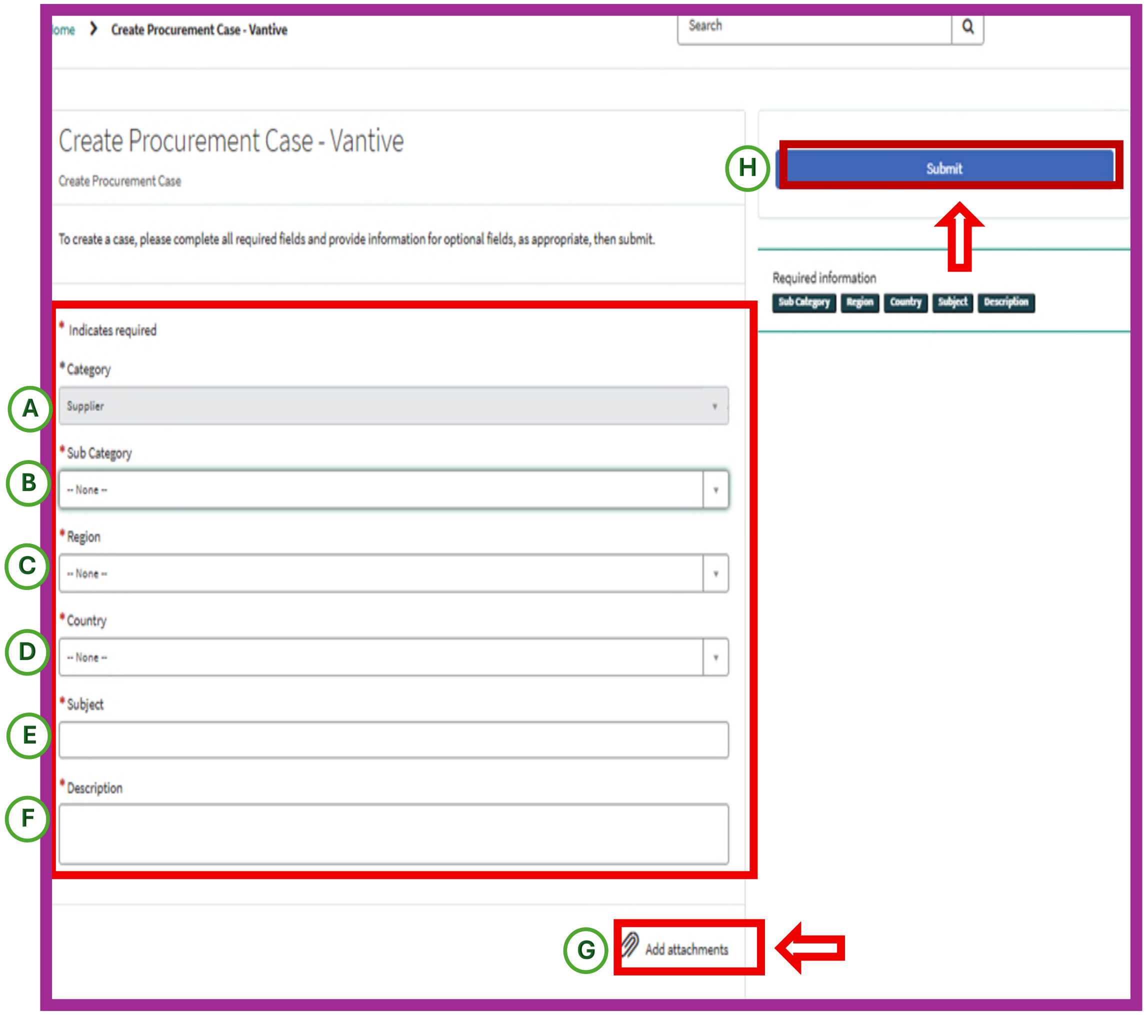
1. Click on "**Procurement Case Request**."



2. This will open the ServiceNow intake form – '**Supplier'** will automatically populate in the default **"Category**" field.

3. To complete the service request, finish by entering the required information below.

Vantive



a. Category: This is the field supplier's name will automatically populate as default.

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

c. Region: Select the region where the supplier 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).

d. Country: Select the country where the supplier is located.

e. **Subject:** Enter a brief description of the issue or question the supplier has.

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

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

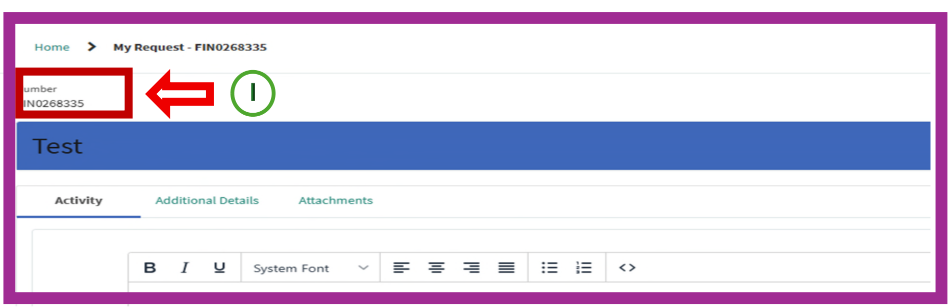
g. Attachments: Sometimes, supporting documentation is required. Use the "**paperclip**" icon to '**Add attachments'** to the service request. Documents that might be added may include screen shots, letters. emails or other information a responder may need to solve your issue. To add the attachment, 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.

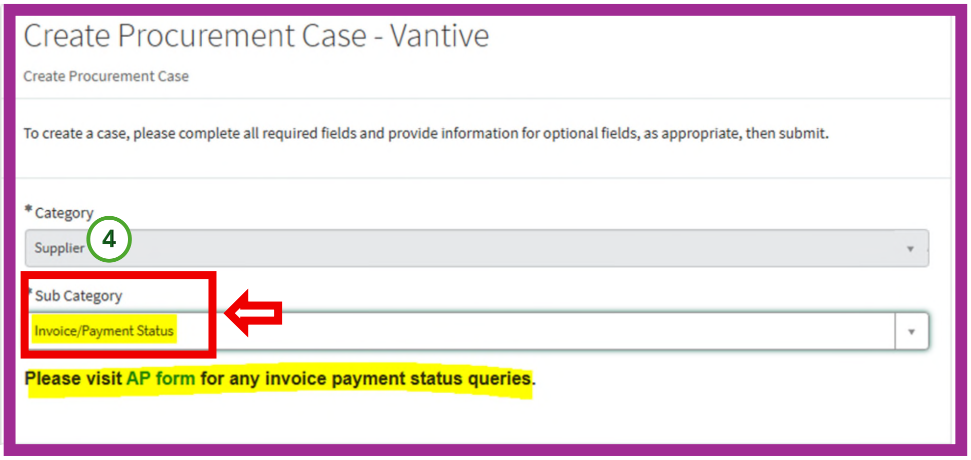
h. **Submit**: Once all fields are completed in the intake form, click '**Submit**.'

i. 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 will appear as from "CSM Finance."

Caution: 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.

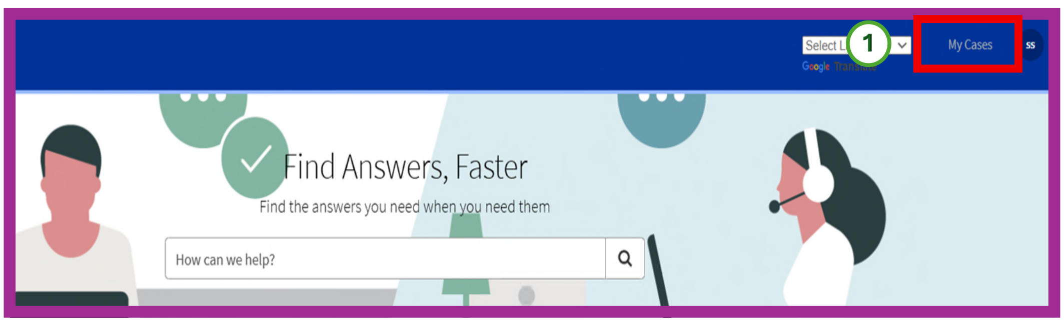


4. **Caution**: Service requests for **Accounts Payable (AP)**, supplier will be directed to the AP form.

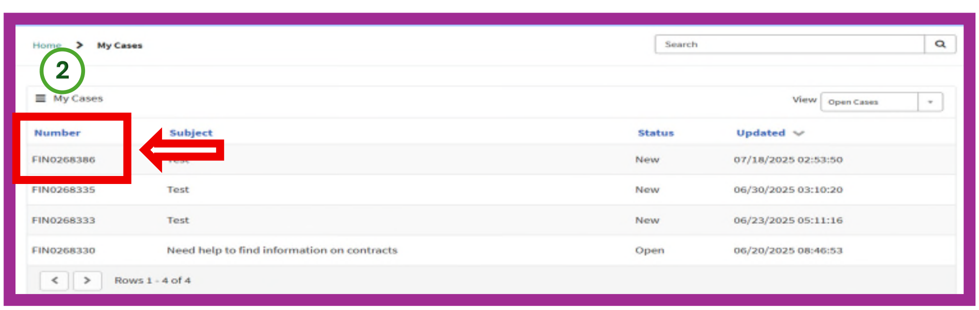


➢ HOW TO TRACK A SERVICE REQUEST

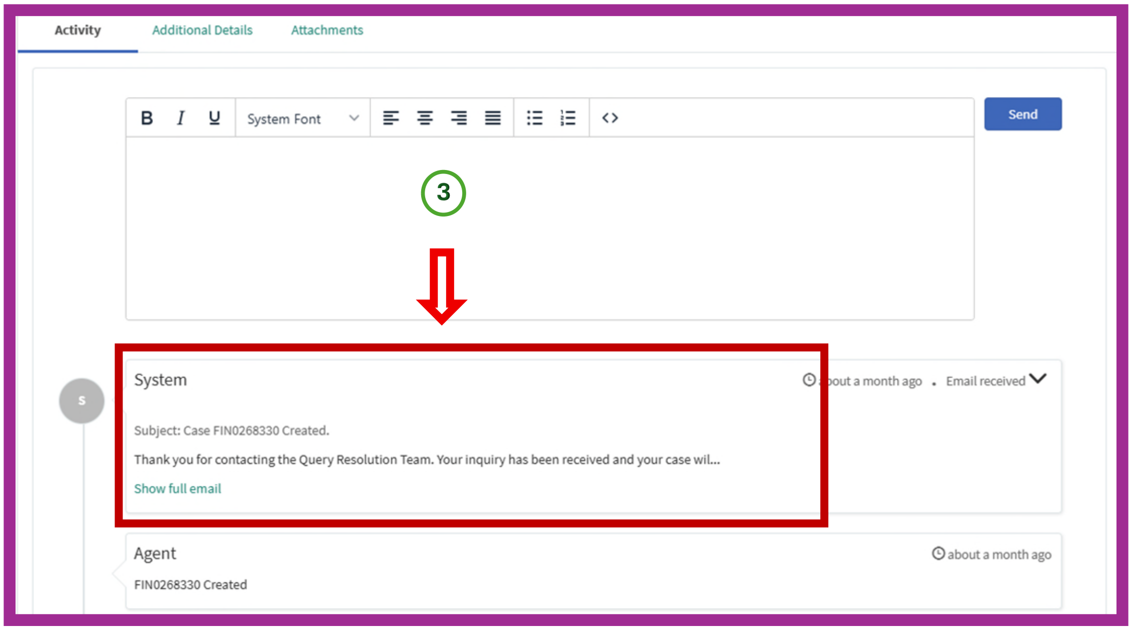
1. To track the service request, click on ServiceNow home page and click on "**My Cases**."



2. Select the service request you want to track by clicking on the service request number FIN xxxxx.

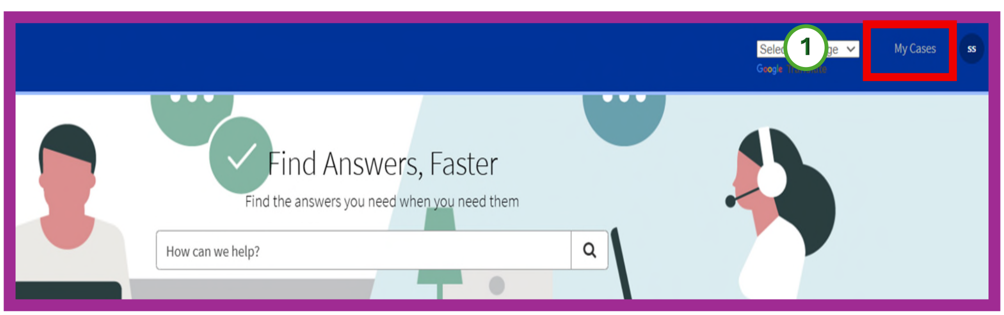


3. You will see the details and status of the Service Request.

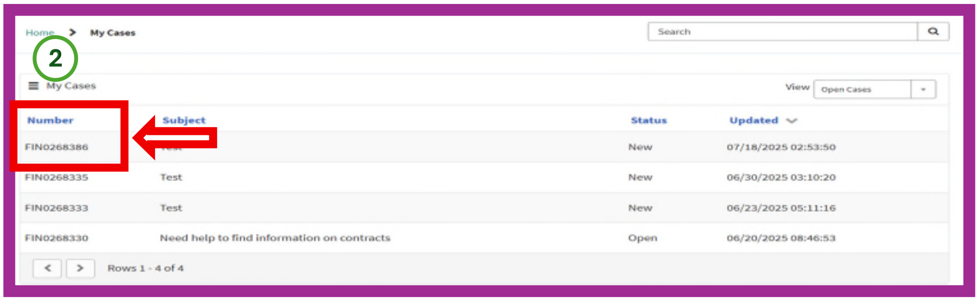


➢ HOW TO UPDATE A SERVICE REQUEST

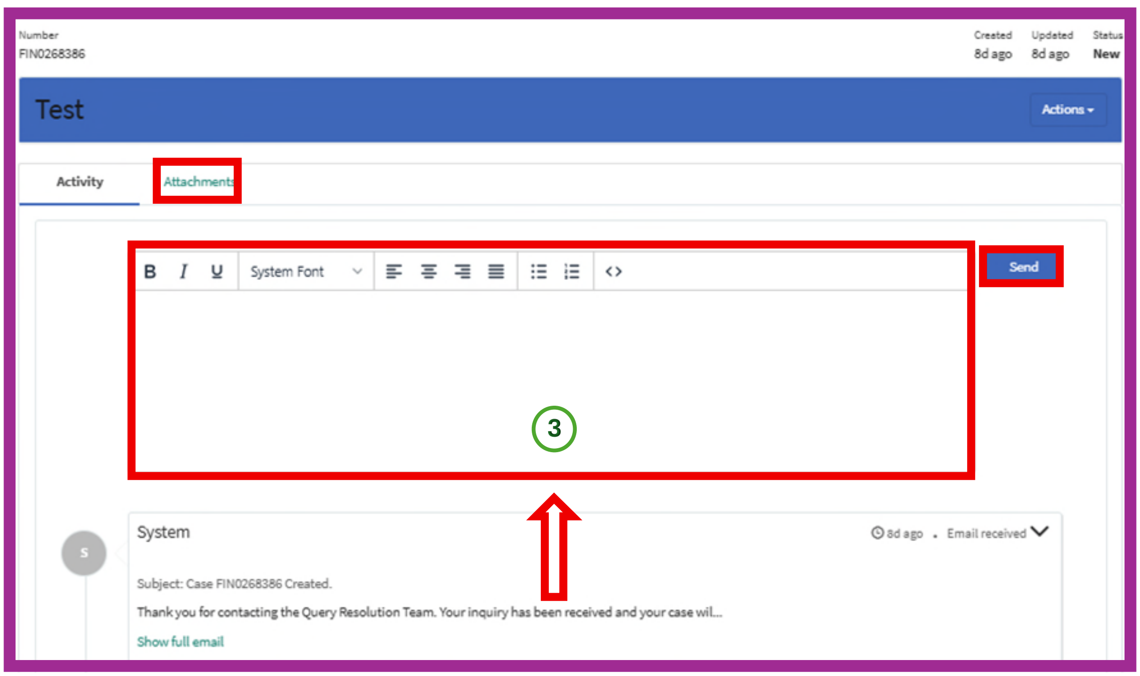
1. To update the service request, click on ServiceNow home page and click on “**My Cases**.”



2. Select the service request you want to update by clicking on the service request.

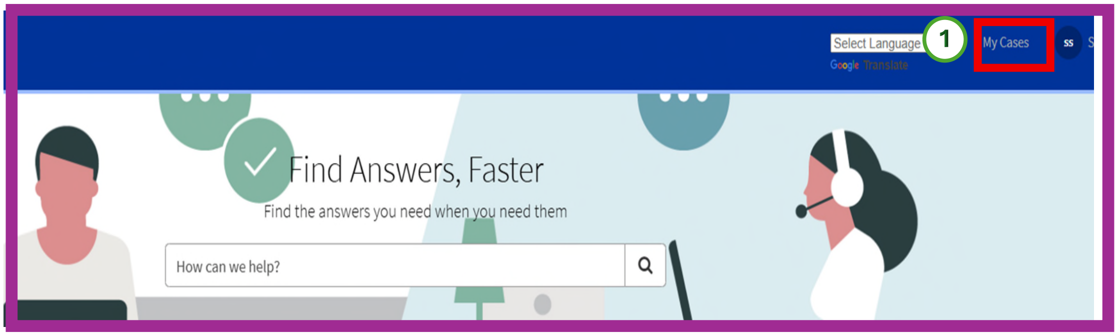


3. Enter the details into the text box and if you want to add an attachment then click on "**Attachments,"** upload and "**Send."**

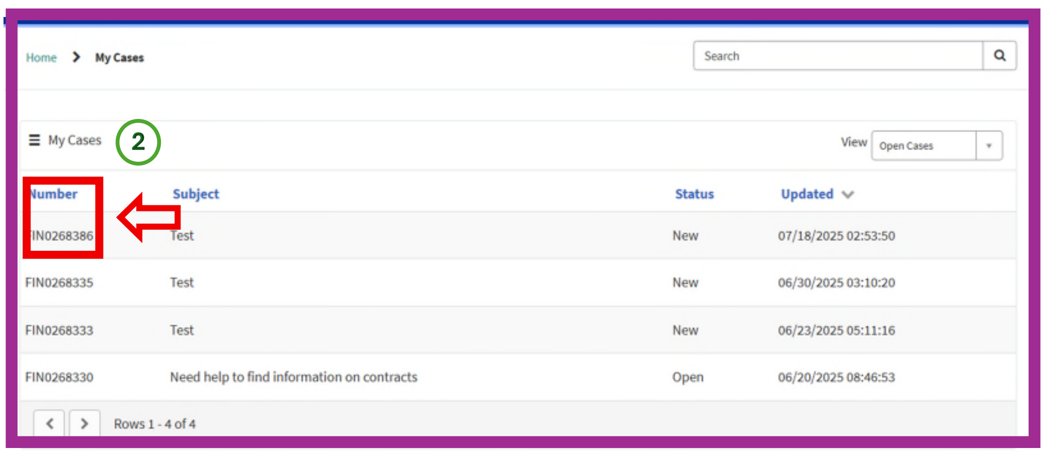


➢ HOW TO ESCALATE A SERVICE REQUEST

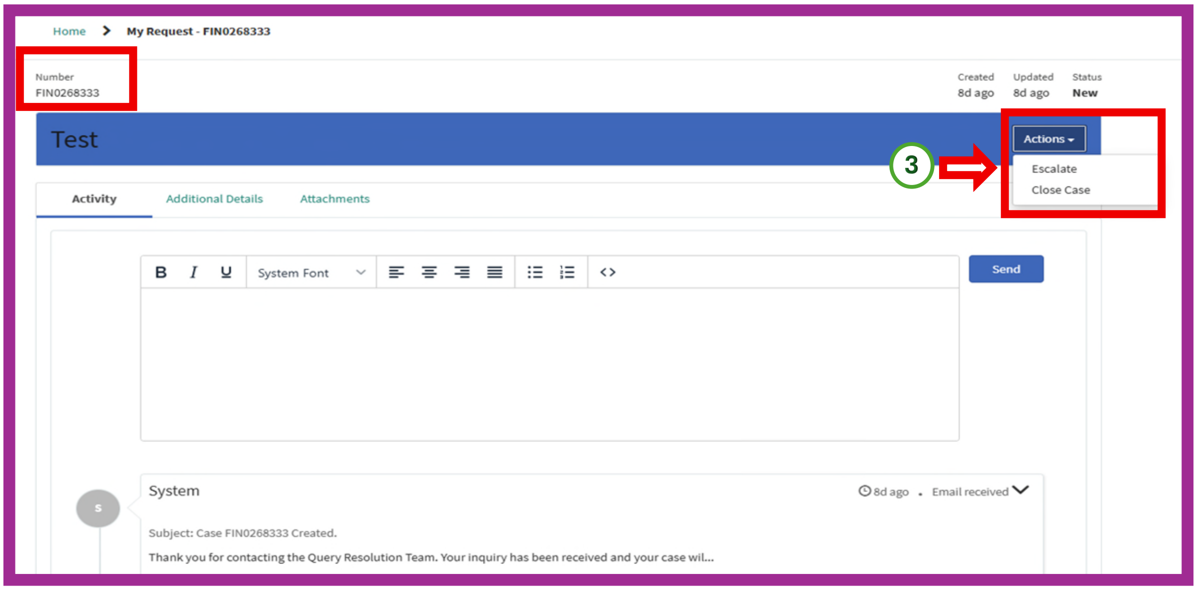
1. To escalate the Service request, click on ServiceNow home page and click on "**My Cases**."



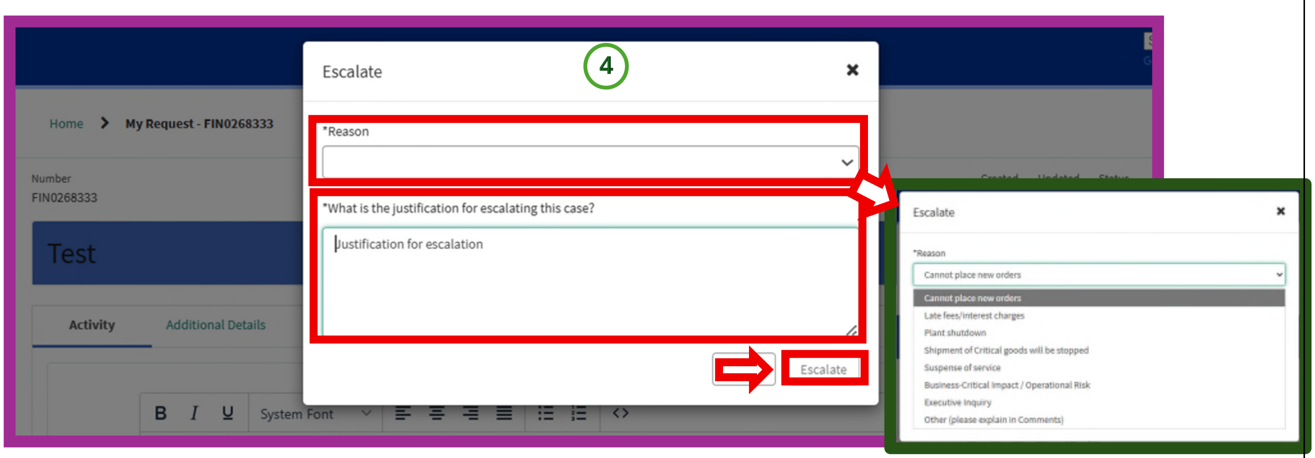
2. Select the Service request you want to escalate by clicking on the Service request.



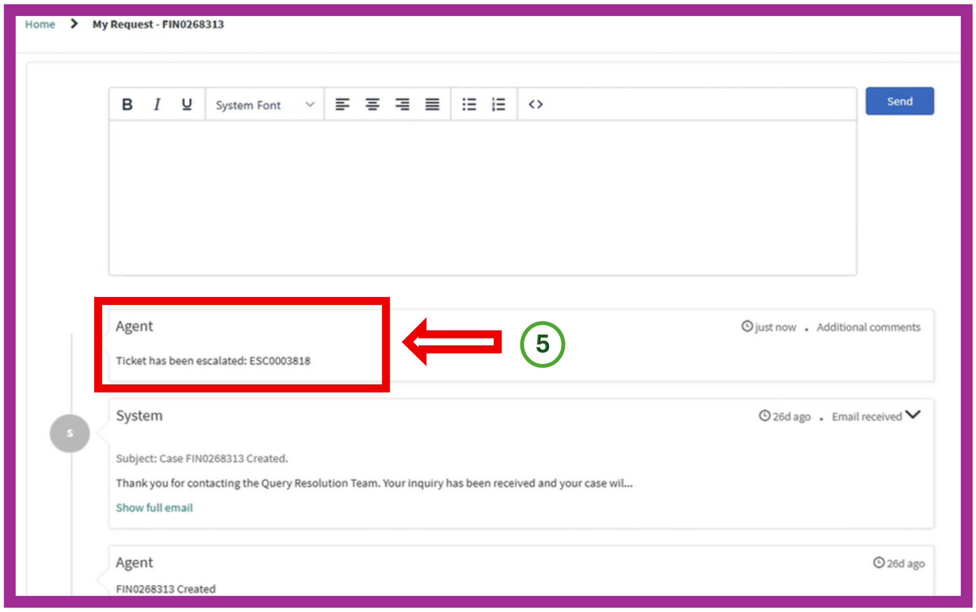
3. If the Service request has not been actioned within 2 days, then click “**Actions**” and select “**Escalate**”



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



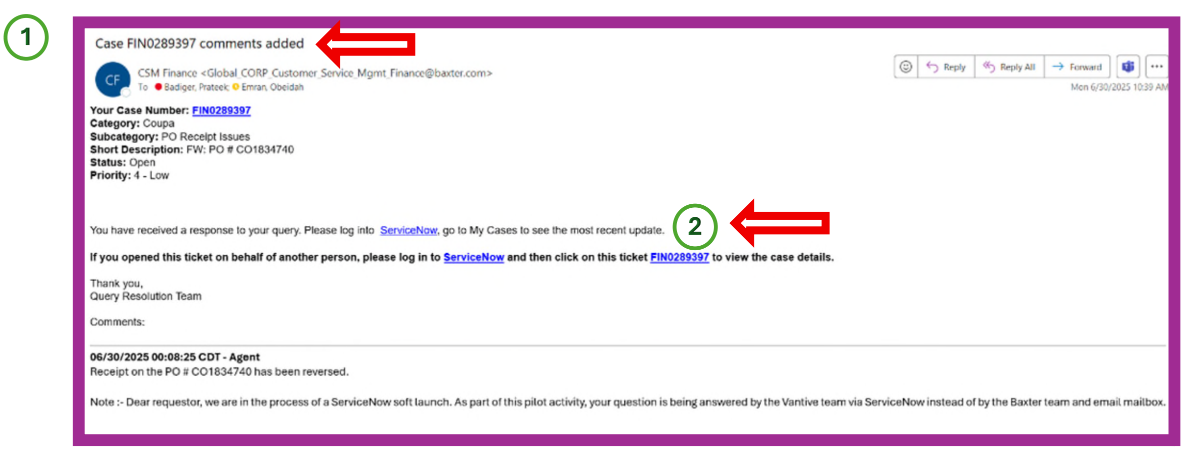
5. Here you will see the escalation case number.



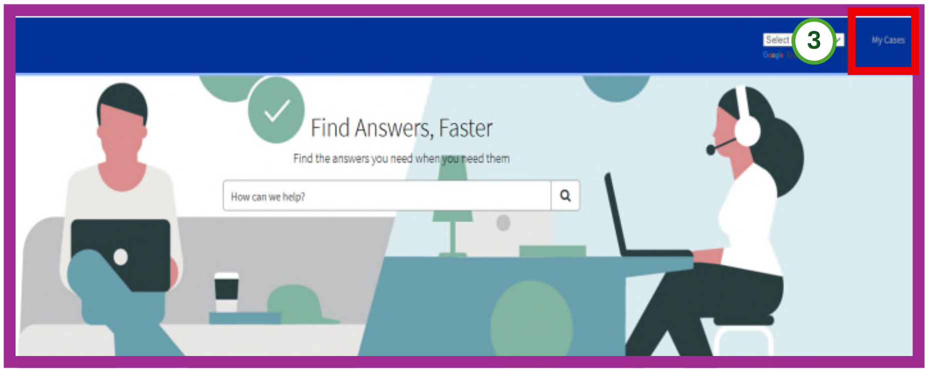
➢ HOW TO ACCEPT OR REJECT A PROPOSAL

1. Once the agent has actioned the Service request and proposed a solution, user will receive an automated email.

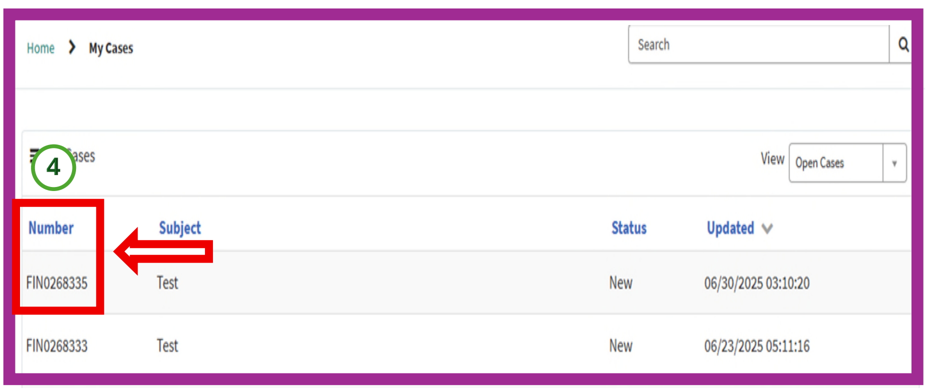
2. Supplier can either click the link as provided in the email or follow the navigation steps outlined in the below.



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

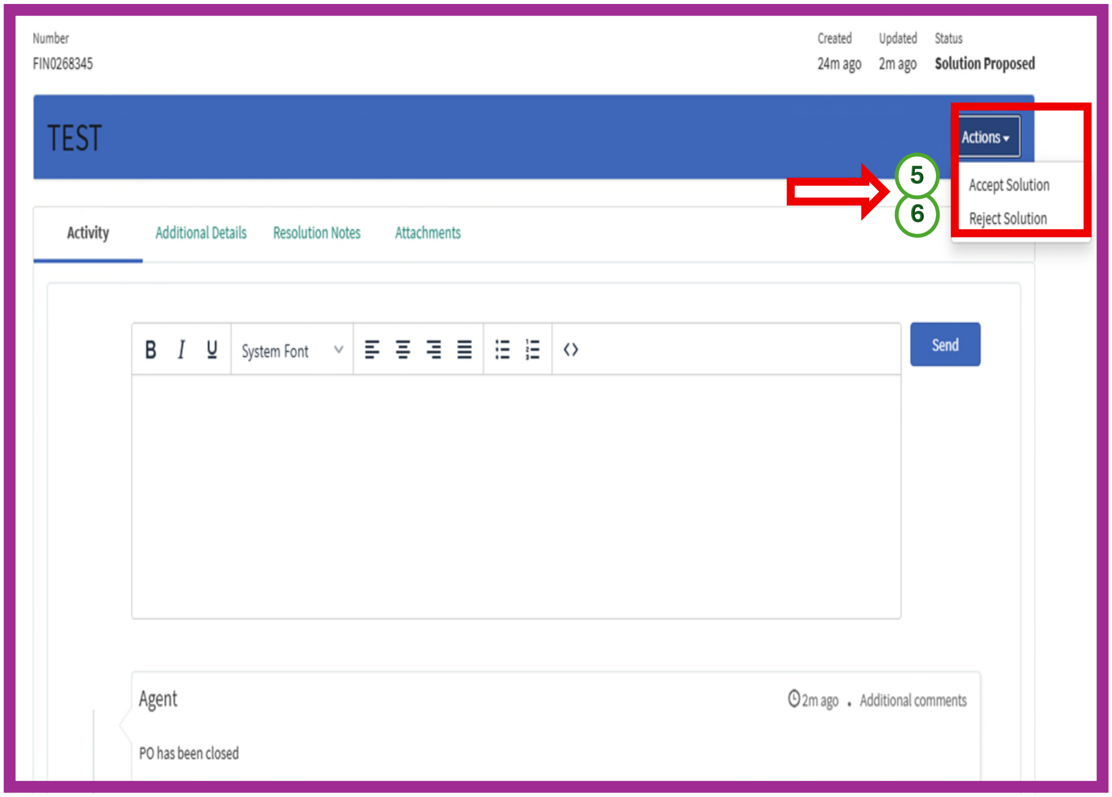


4. Select the service request you want to **Accept** OR **Reject** by clicking on the Service request.



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

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