

# Checklist Pro Pre-Built Solutions

March 31, 2025

**Checklist Pro** is a no-code / low-code tool for developers (*citizen developers to pro-coders alike*) providing cost-saving options for solving problems on the ServiceNow platform. One of the benefits that Checklist Pro customers enjoy is access to an ever-growing suite of pre-built solutions to provide immediate value for a variety of commonly occurring ServiceNow business use cases.

These solutions are available as update sets that can be installed, configured and even modified to suit the needs of each customer.

## Text to Checklist (AI Assist)

You've heard of Text-to-Code? Well now there's a Text-to-Checklist!

Our pre-built Checklist Pro solution provides an "AI Assist" button that integrates seamlessly with AI-in-a-Box, a private AI solution designed to help you get things done with maximum security and control at a fraction of the price. *Integration with ServiceNow's Now Assist coming soon!*

Simply ask a question on a topic and this integration generates a tailored response that, with one button click, creates a ready-to-use Checklist directly in Checklist Pro.

The AI prompt returns a Markdown format checklist that is then transformed into a Checklist Pro checklist at the click of a button.

Video: <https://youtu.be/EwhWTRBlqug>

## Delegated Developer Jump-Start Program

**Question:** How do you tap the full potential of ServiceNow, bringing to life an endless stream of simple services and workflows solving your organizational needs with a limited budget and limited development resources with their own set of priorities?

**Answer:** Leverage your domain expertise by having them build Service Catalog items.

**Problem:** How do you govern this activity to ensure platform integrity and consistency with your catalog and workflows?

**Solution:** It's a serious challenge but one that is easily solved with Checklist Pro.

The Checklist Pro Delegated Developer package provides a Catalog Builder template to allow those with no ServiceNow skills to build a Service Catalog item in seconds and leverages a pre-built simple workflow providing an optional approval step followed by an optional work-completion step.

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Your Delegated Developer community need only know the following things:

- The name of the Catalog Item to be created
- A short description of what the Catalog Item does
- A set of input data to be collected from the service requesters, built in Checklist Pro as a checklist (*as easy as building a word document*)
- A set of processing instructions also configured in Checklist Pro as a checklist of things to do to have the request completed
- Pick a group for approving (*if necessary*)
- Pick a group to complete the work (*if necessary*)

We've had customers build interesting services such as Telework Request, setting up Email Relay Servers and others in as little as 10 minutes.

Video: [https://youtu.be/\\_JbQ4gMtNUs](https://youtu.be/_JbQ4gMtNUs)

## GRC Attestation

Governance Risk and Compliance (GRC) helps organizations automate risk management, compliance tracking, and policy enforcement to improve security and regulatory adherence.

This comprehensive and full-featured application from ServiceNow can be complex and costly for those in the organization that review controls to assert (or "attest") their validity and necessity, especially when those performing these activities only occur a couple of times per year.

To simplify this step and reduce the costs associated with having users with attestation-performing duties, a Checklist Pro solution provides a simple to use, cost-saving alternative that inserts directly into the out-of-the-box (OOB) GRC Attestation process. Simply leave the OOB attestation field on the GRC Control record blank and a Checklist Approval with GRC Attestation checklist will be sent to the specified reviewers. Since Checklist Approvals are used vs OOB GRC Attestations, any user in your organization, even those without ServiceNow roles, can be selected to perform this work. The results of the Checklist Approval are carried back into the GRC Control record and the normal GRC Attestation process continues, but with a cost-saving and more simplistic approach applied.

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## Knowledge Article Checklist Approval

Knowledge Base articles can be a source of truth for policies, procedures and troubleshooting, but to ensure this, reviews and oversight are often required. ServiceNow provides an option for approvals of articles before they are published, but these approvals come at the cost of Business Stakeholder licenses.

Checklist Pro provides an alternative to OOB approvals that require users with Business Stakeholder roles (incurring a paid subscription cost per approver). By utilizing Checklist Approvals, accessible to Requester users (i.e., unlicensed users), in the Knowledge Article review process, organizations can grow the number of KB article reviewers without growing their Business Stakeholder subscription costs.

Video: <https://youtu.be/Erd8mhwBe24>

## Fillable PDF to Checklist and Back to Fillable PDF

Fillable PDFs are everywhere, in ServiceNow too, especially prevalent in HRSD, Knowledge Base and Document Management applications.

It is often necessary to capture information first in ServiceNow, for various business operations and decision-making workflow activities and then store it in PDFs.

Since Checklist Pro checklists are a natural way to capture user input, we provide a "Generate Checklist from PDF" option that will scan a fillable PDF attached to a Checklist Pro Configuration file and you instantly have a checklist that represents the fillable fields from that PDF and then another button to "Save as PDF" to store those checklist items back into the Fillable PDF.

Video: <https://youtu.be/qw9l31VLpgo>

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## Data Stewardship Solutions

There's core (critical) data in every ServiceNow instance: users, groups, departments. Everyone has them and almost certainly everyone has experienced cases where this data becomes incorrect:

- Users in the wrong groups
- Users reporting to the wrong managers
- Users in the wrong departments

If this information is incorrect, it can cause problems:

- Improper work assignments or approval requests
- Access to information that should not be permitted
- Subscription cost impacts for users with premium roles that are not appropriate

Customers with Checklist Pro can get access to our "Data Stewardship" solutions that prevent this from happening:

- Group Member Management
  - Checklist Approval sent to Group Manager to review the list of employees in the group(s) they manage.
  - The manager can uncheck the member that should be removed or (using a person picker), add people that should be in the group.
  - Once changes are made (if any are required), the manager clicks approve and the group is updated. If Active Directory needs to be updated, an Integration Hub call can be added.
  - Video: <https://youtu.be/FyRbismEwUE>

This same Checklist Pro approach (*method as described above*) also applies to these use-cases:

- Manager / Employee Relationship Management
- Department Member Management
- Business Unit Management

The added benefit of this solution is Checklist Approvals are leveraged (vs OOB Approvals or Task – both of which require paid subscribers). Checklist Approvals are available to free requester users and thus the governance / oversight of this functionality does not come with subscription cost penalties.

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## Hardware Inventory Assessment

Most companies perform annual hardware inventory assessments. Even if you have a CMDB, performing physical inventory activities are worthwhile for a variety of reasons include asserting who has what asset / CI, finding items that may be in the CMDB but not reporting through discovery, etc.

Although organizations may have existing physical hardware inventory processes in place, we've built a complimentary solution in Checklist Pro that creates a Checklist Assignment record for every unique "Assigned To" user from the Hardware (*alm hardware*) table and on that record showing all the hardware CIs assigned to them presented as a checklist.

Since Checklist Assignments can be assigned and completed by any user, even those without roles, they can easily review the checklist of hardware items listed as being assigned to them. The items still in their possession they leave checked. Items not in their possession, they uncheck. If they need to add items not listed, they simply use the Hardware Item picker at the bottom of the checklist and click the "Add" button to add it to the list of items in their possession.

Once finished, they click the "Complete" button to show the Checklist Assignment has completed.

We've built a Hardware Assessment dashboard to highlight a variety of key findings such as:

- # active users with Hardware
- # unassigned Hardware items
- # inactive users with assigned Hardware items
- # in-progress assessments
- # completed assessments
- # cancelled assessments
- # completed assessments needing review – these would be cases where the user added or removed items in their checklist (which helps the inventory team know who they may need to prioritize to confirm)
- # in-progress assessments with updates – though the user hasn't completed their assessment, they've already made some changes so this can give a "heads up" that additional visits by the inventory team may be necessary

Using Checklist Pro for solutions such as this can be a valuable supplement to your organization's Hardware Inventory activities by utilizing self-assessment to help target the inventory team's activities.

Video: <https://youtu.be/owZFMXgVsjs>

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## CMDB Server Assessment

In your CMDB, certain things may not be discoverable, such as who is responsible for managing a Server.

Nevertheless, knowing who is responsible for managing each Server is important and having a means to oversee and govern such activities is very important.

This is why we have built the CMDB Server Assessment solution. With this solution, a scheduled job reviews the Server CIs, creating a Checklist Assignment record for each unique person responsible for managing a Server. Each Server listed as being managed by that person is listed as a checklist item in the Checklist Assignment record for that Server manager.

Since Checklist Assignments can be assigned and completed by any user, even those without roles, they can easily review the checklist of hardware items listed as being assigned to them. Any Servers still managed by the assigned manager they leave checked. Servers they no longer manage should be unchecked. If they need to add Servers not listed, they simply use the Server picker at the bottom of the checklist and click the "Add" button to add it to the list of Servers that they manage.

Once finished, they click the "Complete" button to show the Checklist Assignment has completed.

We've built a CMDB Server dashboard to highlight a variety of key findings such as:

- Total number of Servers being managed
- # In-progress Server assessments
- # completed Server assessments
- # cancelled (incomplete) Server assessments
- # Server assessments needing review – these would be cases where the Servers were added or removed by the Server manager completing the assessment (this can help create a double check review by the organization to ensure accuracy)
- # In-progress Server assessments with updates - though the Server manager hasn't completed their assessment, they've already made some changes so this can give a "heads up" that additional reviews may be necessary

Using Checklist Pro for solutions such as this can be a valuable supplement to your organization's CMDB Server activities by providing a governance / oversight solution to ensure accuracy within your CMDB.

Video: <https://youtu.be/BdvTY7k009w>

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## Ready-to-Use Checklists

We have a growing list of checklists, which may be placed on any record (OOB Approval, Change Task, Catalog Task, you name it). These checklists may be a spot on use, or can be changed to suit your needs, or inspire ideas for how to build your own.

- Environment, Health & Safety (EHS)
  - Emergency Preparedness Inspections
  - Hazard Material Handling Inspections
  - General Safety Inspections
  - Machine Safety Inspections
  - Fire Safety Inspections
  - Personal Protective Equipment (PPE)
  - Environmental Compliance
  - Chemical Safety Inspections
- North American Electrical Reliability Corporation Critical Infrastructure Protection (NERC-CIP)
- Project Management (SPM)
  - Video: <https://youtu.be/J4ACZ8IETXU>
- ServiceNow Instance Upgrade
  - Video 1: <https://youtu.be/RNRr4yKQDHs>
  - Video 2: <https://youtu.be/SHWcwAE5Qbc>