

Cargotrailersinc.com is the leading destination for online Trailer shoppers, with over 10 million visits each month. Like many enterprises, they relied heavily on spreadsheets to maintain IT data, which resulted in cumbersome processes and varying sources of the truth(Need for support of import sets using Excel sheets to load information about new trailers added to the list using Transforming import sets). Now, with a single system of record, Cargotrailersinc.com is able to put the right information in the hands of its employees and buyers. HR saves over 250 hours per year in onboarding processes and IT is empowered to complete 78% more service request tickets per month(Need for Order guide to implement onboarding of employees).

- Cargotrailersinc must use ServiceNow portal with various modules and should cater to different logins for Requesters,Fulfillers ,Approvers,Admins and Employees with specific access.

Reducing Personnel Time and Boosting Accuracy

With ServiceNow as a single system of record, Cargotrailersinc.com was able to solve the common issue of having a variety of separate tools and data.

Use OAuth authentication for employees to access ServiceNow portal implementing REST API.

This ServiceNow case study is based on an interview with Andrew Pilsner, IT Operations Manager at Cargotrailersinc.com .

Business Need

Like many enterprises, Cargotrailersinc.com used centrally-stored spreadsheets to manage various business processes. While a capable tool for personal work, spreadsheets prove cumbersome for group involvement. Once loaded with information, it becomes difficult to locate exactly what a person needs to know or see. Despite hosting in centralized repositories, such as SharePoint, version control quickly becomes an issue, and without automated workflow, it is difficult to ensure that information and requests get to the right people at the right time. Cargotrailersinc.com saw a great opportunity to change the way work gets done, not only inside IT but also for various departments.

Business Solution

With ServiceNow as a single system of record, Cargotrailersinc.com was able to solve the common issue of having a variety of separate tools and data. “We had so many tools in place for just IT service management,” said Andrew Pilsner, IT Operations Manager. “That meant our processes were siloed and disjointed. It was also difficult to report on incidents or changes from a corporate perspective.”(Need for **Customized Incident and Change Management**)

Some guidelines to be part of the project

Use Client scripts to put specific alerts (Ex : Employee captures information from trailer buyers about trailer repairs,Use Glideform methods Ex: get values from field and display it.Use Glideform to filter out type based on validation of previous fields,Use UI Policy in the Maintenance and repair form to make some fields

mandatory, ready only or visible on fields imported from task table, Use UI policy to make other field not visible with message displayed (Refer example discussed during class on Client Scripts - Glideform)

Solution

Cargotrailersinc.com selected ServiceNow as its single system of record for IT knowing early on this would be part of a larger vision to automate work processes across other parts of the organization. Soon after implementation, the team created several custom applications using the ServiceNow platform to automate request management and fulfillment in groups such as the Assignment groups (Operations Center, PMO, HR and Maintenance team).

Besides greater efficiency and faster service, ServiceNow brought full visibility into the service requested and greater understanding of causes, needs and other trends. ServiceNow also enabled the scalability and mobility the company required for growth.

- For service Requests Get number of SERVICE REQUEST records submitted by employees/users (As per need) and display it after employee submits, Display schema map of your table extending task table
- Put SLA for completed and closed of SERVICE REQUEST request as 4 days
- For Service Catalog must have feature of importing new Trailer information from external excel sheet using import set and data sources
- It should send email notification as part of workflow / change of state of SERVICE REQUEST form
- Using Glide Aggregate in client scripts display trends of weekly submissions of SERVICE REQUESTs
- Use script include to add info message (refer example discussed during class)
- Use script includes using gliderecords to get number of records (SERVICE REQUEST requests) submitted and display in client form using client scripts using glide records and glide ajax method.
- Use update sets to create different versions of your code development and move it to another instance including data of all tables

ServiceNow Facilities Service Automation

The IT team extended the use of ServiceNow to manage the work for the facilities department. All incidents and requests for facilities are tracked through ServiceNow. The facilities team can respond to new requests through their mobile phones while they are already out dealing with various physical building concerns. Previously, the facilities team logged incidents into Tivoli, but the information was not accessible from a mobile device. They would have to wait to get back to their desk to see that “a conference room is too hot or there is a problem with a rest room, and it was two hours ago,” reflects Carter. “Now they carry around their phones and watch their queue. They are never at their desks. They are facilities. They are running around

fixing things. They are getting a great response on how much more quickly they are addressing issues around the office.”

- The two facilities engineers are now resolving, on average, over 100 tickets per month. Prior to ServiceNow they were resolving around 40 per month.
- Configure reports separately for approved change or other requests ,Rejected requests and onhold requests and schedule it to run reports mailing to approvers.

Employee Onboarding

Cargotrailersinc.com recently started automating their employee onboarding process by integrating with the OpenHire software the HR team and hiring managers use for staffing. The custom Employee Onboarding app sets off a process to provide for the IT needs of a new employee once a requisition is marked as hired. HR, hiring departments and IT all benefit from the streamlined, automated process. Without having to necessitate a last minute fire drill, computers can be procured and provisioned appropriately, the new person added to Active Directory and email enabled with proper access to distribution lists and share drives.

- HR, has saved 300 hours per year due to service automation.
- Time savings for IT is in excess of 1,000 hours per year.
- 90% of all new employees receive all hardware and access their first day at Cargotrailersinc.com .

Operations Turnover App

The IT Operations Center at Cargotrailersinc.com is a top notch 24x7x365 monitoring center. Previously, the IT operations team used a Word document to capture everything that happened during their shift. Stored in Share Point, the document became the handoff for the next shift to ensure continuity and awareness of issues and changes. As the document grew, it became difficult to use. “It became verbose and hideous,” said Pushpinder. While it adequately captured details, it required the team to remember various historical details and apply that knowledge to deal with current situations. With the custom Operations Turnover App built on the ServiceNow platform, the team no longer has to keep things in their minds or search through past records. They are better able to ensure continuity, and each shift can get up to speed quickly. The application makes it easy for the operations team to assign tasks to various shifts for upcoming activities or see changes and severity 1 incidents that occurred in the previous 24-hour period or changes coming in the next 24 hours.(SLA must be configured for support system of change and incident)

Besides the impressive results in productivity, responsiveness, efficiency and effectiveness, Cargotrailersinc.com has seen other significant impact due to its use of ServiceNow.

Project Planning with Visual Task Boards

Cargotrailersinc.com uses Visual Task Boards from ServiceNow to graphically display the tasks and associated phases for the company's operations and engineering teams in PIE CHART style. Project steps are tied to Incident Management and Change Management because of the strong interrelationship.

Budget Planning

As a part of Project Management, Carter and team created a service catalog item to enable managers to submit requests for the next budget period. Replacing spreadsheets passing from one person to the next, the application provides much more efficient means for budget considerations and approvals.

Cargotrailersinc Drive Academy Library System

Previously, the training department managed the check-out and check-in of hard copy technical documentation, manuals and books through a SharePoint application which required additional software to power the workflow. Now the IT group is creating an application in ServiceNow to automate the process and make it easy to instantly know who has what and where materials are located. (Knowledge management need to be implemented)

Some Conclusions

Besides the impressive results in productivity, responsiveness, efficiency and effectiveness, Cargotrailersinc.com has seen other significant impact due to its use of ServiceNow: Shifting the focus from mundane, routine tasks to activity with greater value to the business. "We look toward ServiceNow in terms of automating and improving our lives," says Quninnon. "The less we have to do of the more trivial tasks, the better." Evolving the model of work by moving from spreadsheets, Word files and SharePoint to a single platform for automating workflow. "We are looking at moving the applications off SharePoint where it makes sense," says Quninnon. "Any time you can get a group process away from a spreadsheet it is a good thing. It gives us the chance to think through how work actually gets done differently."

Establishing the means to make work easier for people. By removing manual and menial tasks and replacing them with a systems-based approach using automation, employees can do their jobs more easily and with greater satisfaction. "Now we can make it easy for people," says Quninnon. "If you don't make it easy, people won't use it. We're even looking at the possibility of putting SLACK integration on all of our printers and conference room phones. If someone has a problem, they can slack an incident, and it will automatically generate an incident in ServiceNow. A small change such as this makes a vast difference for people." Elevating the perceptions of IT. By speeding service, eliminating mundane work and easing the processes to get things done, IT gets instant recognition from employees and management. It's easy to see that things are working substantially better. "We get a lot of great feedback about the quickness of our response," says Quninnon. Being an advisor to the business. By providing a new way to manage requests and automate work, the IT group is in the position of advising various departments how to gain substantial efficiencies and dramatically change response and completion times. "We are able to insert ourselves into the business side and show what we can do for them," says Quninnon.

SDLC Workflow and Project Management

Use Flowchart using MS Visio or any free available software to represent flow of your portal .Use Agile framework to split responsibility and track sprint flows