

## Access Card Request and Distribution for Daily Essentials LTD

Daily Essentials LTD, a large retail chain with over 500 stores across Australia, needs a new and improved system for employees to request and receive access cards. Currently, different employee groups have different access needs, and the current system isn't meeting those needs effectively.

### Employee Groups and Access Needs

- **Full-Time Employees:** Receive access cards when they are hired. The level of access depends on their job role and responsibilities.
- **Managers:** Receive access cards with higher clearance levels, allowing them to enter restricted areas.
- **Head Office Employees:** Receive access cards that allow them to enter the corporate office and specific departments.
- **Casual Workers:** May receive temporary access cards with limited access, depending on their job role and how long they are working for.

### Proposed Solution: ServiceNow Catalogue Item

To make the access card request process easier, a new ServiceNow catalogue item can be created within the HR Operations' Operational Service category.

### Catalogue Form Fields

- **Core Fields (Required for All Groups):**
  - Employee ID
  - First Name
  - Last Name
  - Job Title/Role
  - Department/Location
  - Start Date (If New Hire)
  - Card Type (Standard, Manager, Temporary)
  - Reason for Request
- **Group-Specific Fields:**
  - **Full-Time Employees:**
    - Expected End Date (If Applicable)
  - **Managers:**
    - Access to Restricted Areas
    - Approval Authority (Optional)
  - **Head Office Employees:**

- Office Floor/Area
- **Casual Workers:**
  - Assignment Start Date
  - Assignment End Date
  - Supervisor/Manager
  - Required Access Days/Hours

## Development Requirements

1. **Design the Catalogue Item**
2. **Create Variables or Variable Sets**
3. **Define SLA Definitions** for New Hires, Lost Cards, and Role Changes, and attach them to catalogue item requests.
4. **Design the Workflow** including approval processes based on card request type, email notifications (acknowledgement, user group, fulfillment, and manager), and other relevant notifications.

## Detailed Design Workflow Requirements:

### 1. Group-Based Approval Workflows:

- **Standard Access Cards (Full-Time, Head Office, Casual):** The employee's direct manager must approve these requests.
- **Manager Access Cards:** Two-step approval process:
  - **Step 1:** Direct manager approval.
  - **Step 2:** IT Security team approval (only if access to sensitive areas like data centers or AI Robotics areas is requested).
- **Temporary Access Cards (Casual Workers):** The specified Supervisor/Manager must approve these requests

### 2. IT Security Approval Process:

- A dedicated IT Security approval group needs to be created in ServiceNow.
- The approval workflow will then need to be configured to automatically send Manager Access Card requests to this group when specific "Access to Restricted Areas" are selected.
- Clear SLAs for IT Security approval need to be defined to make sure these requests are processed quickly.

### 3. SLA-Driven Task Fulfillment:

- Different SLA definitions will need to be created for each card type:
  - **Standard Access Card:**
    - New Hire: 2 business days
    - Lost Card: 1 business day

- Role Change: 3 business days
- **Manager Access Card:**
  - New Hire: 3 business days (including IT Security approval)
  - Lost Card: 2 business days (including IT Security approval if applicable)
  - Role Change: 4 business days (including IT Security approval if applicable)
- **Temporary Access Card:**
  - New Request: 1 business day
- ServiceNow needs to be configured to automatically assign tasks to the relevant fulfillment groups (e.g., HR, Security, Facilities) based on the card type and request details.
- Escalation procedures for SLA breaches need to be established to ensure timely resolution.

#### 4. Catalogue Item Enhancements:

- **Access to Restricted Areas:** A choice list field with options for specific sensitive areas (e.g., Data Center, AI Robotics Area, Executive Suite) needs to be created.
- **Approval Authority:** For Manager Access Cards, an optional field needs to be included to specify an alternative approver if the direct manager is unavailable.

#### Development Tasks:

- **Workflow Configuration:** The approval workflows in ServiceNow need to be designed and implemented, incorporating the group-based logic and IT Security approval process.
- **SLA Definition:** The SLA definitions for each card type and request scenario need to be created and configured.
- **Task Fulfillment:** Task templates need to be defined and assigned to appropriate fulfillment groups based on request parameters.
- **Catalogue Item Update:** The existing catalogue item needs to be modified to include the new fields and logic.
- **Testing and Deployment:** The enhanced workflow and task fulfillment process needs to be thoroughly tested before deploying to production.

#### Benefits:

- **Enhanced Security:** Access to sensitive areas will be properly authorized and controlled.
- **Improved Efficiency:** The approval and fulfillment process will be automated, reducing manual intervention and delays.
- **Increased Transparency:** There will be clear visibility into the status of access card requests and SLA compliance.
- **Streamlined User Experience:** The request process will be simplified for employees and managers.

# Agile Story: Access Card Request and Distribution

**User Story:** As an employee of Daily Essentials LTD, I want to easily request and receive access cards based on my role and responsibilities, so that I can efficiently perform my job duties.

## Acceptance Criteria:

- A new ServiceNow catalogue item is created under the HR Operations Operational Service category.
- The catalogue item includes all necessary fields for different employee groups.
- Group-based approval workflows are implemented for different card types.
- IT Security approval is required for Manager Access Cards with access to restricted areas.
- SLA definitions are set for different card types and request scenarios.
- Task fulfillment is automated based on request parameters.
- The catalogue item is updated with new fields and logic.
- The enhanced workflow and task fulfillment process is thoroughly tested.

## Sprint 1: Catalogue Item Creation and Basic Workflow

### Task 1: Create ServiceNow Catalogue Item

- Create a new ServiceNow catalogue item under the HR Operations Operational Service category.
- Add core fields: Employee ID, First Name, Last Name, Job Title/Role, Department/Location, Start Date, Card Type, Reason for Request.
- Add group-specific fields: Expected End Date, Access to Restricted Areas, Approval Authority, Office Floor/Area, Assignment Start Date, Assignment End Date, Supervisor/Manager, Required Access Days/Hours.

### Task 2: Define Basic Workflow

- Create a basic workflow for all card types.
- Define initial state transitions: Submitted, Approved, Rejected, Fulfilled, Closed.
- Configure email notifications for submission, approval, rejection, and fulfillment.

## Sprint 2: Advanced Workflow and SLA Configuration

### Task 1: Implement Group-Based Approval Workflows

- Configure approval workflows based on card type and access requirements.
- Define approval routes for Standard, Manager, and Temporary Access Cards.
- Implement IT Security approval for Manager Access Cards with access to restricted areas.

### Task 2: Define SLA Definitions

- Create SLA definitions for New Hires, Lost Cards, and Role Changes for each card type.
- Set target resolution times and escalation procedures.
- Configure ServiceNow to automatically assign tasks to relevant fulfillment groups based on SLA breaches.

## **Sprint 3: Task Fulfillment and Catalogue Item Enhancement**

### **Task 1: Configure Task Fulfillment**

- Create task templates for different fulfillment groups (HR, Security, Facilities).
- Assign tasks to appropriate groups based on request parameters and SLA definitions.
- Configure automatic task assignment and escalation.

### **Task 2: Enhance Catalogue Item**

- Add a choice list field for "Access to Restricted Areas" with options for specific sensitive areas.
- Add an optional field for "Approval Authority" for Manager Access Cards.

## **Sprint 4: Testing and Deployment**

### **Task 1: Unit Testing**

- Test the functionality of the catalogue item, workflows, and task assignments.
- Verify SLA calculations and notifications.

### **Task 2: Integration Testing**

- Test the integration of the ServiceNow catalogue item with other systems (e.g., HR system, access control system).
- Ensure seamless data flow and synchronization.

### **Task 3: User Acceptance Testing (UAT)**

- Conduct UAT with end-users to validate the functionality and usability of the solution.
- Gather feedback and make necessary adjustments.

### **Task 4: Deployment**

- Deploy the enhanced catalogue item and workflows to the production environment.
- Communicate the new process to employees and managers.
- Provide training and support to end-users.

By breaking down the project into smaller, manageable sprints, the development team can deliver value incrementally and adapt to changing requirements. This Agile approach ensures efficient and effective delivery of the Access Card Request and Distribution solution.

