Source and receive a software request

Lab 4.5   5-10 minute

Lab objectives

You will achieve the following objectives:

- Request sourced through allocations
- Request sourced through purchasing
- Request ordered and received

> **Lab Dependency:** *Requires the completion of Labs 1.1and 4.4*
>
> **Required Resources:** *None*

Scenario

Rick Lemm, the software asset manager at CloudD, needs to fulfill software requests. Some software may have available rights he can use, while other software requires additional rights to be procured. Rick has the **procurement_user** role required to procure additional licensing as it was inherited when he was assigned the **sam_admin** role.

Requirements Summary

User Stories

- STRY040501 – Source the request

  As a software asset manager, I need to source a request for WinZip 15 and Adobe Acrobat.

- STRY040502 – Order and receive license rights

  As a software asset manager, I need to order software rights that were sourced through a purchase order and receive the order for tracking in Software Asset Management once fulfilled.
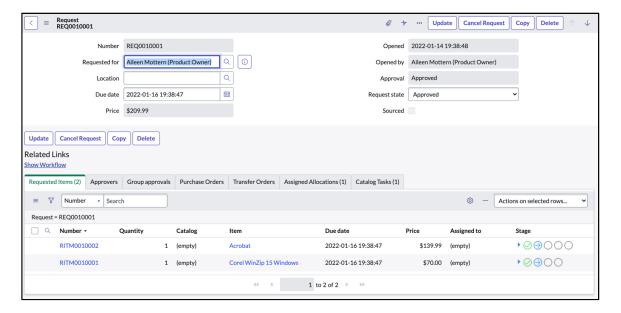
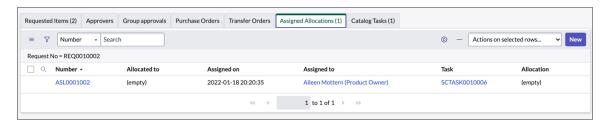## STRY040501 – Source the request

Section 1 Review the request

Rick Lemm, Software Asset Manager at CloudD, wants to review the new request for software license rights.

1. If not already, impersonate **Rick Lemm**.

2. Navigate to **Procurement > Requests > Requests**.
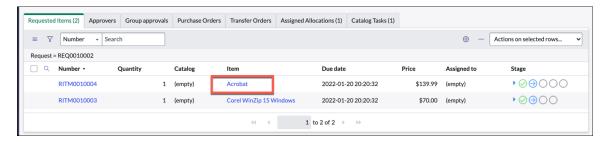
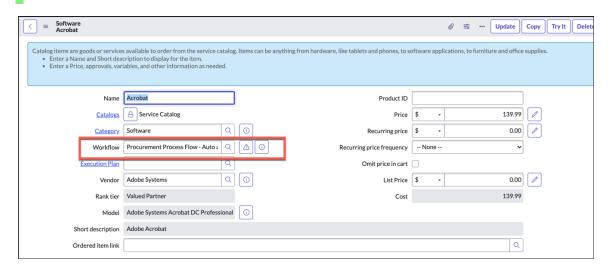3. Open the request for **Aileen Mottern**.

4. Open the **Assigned Allocations** tab to observe the assignment made.

5. Return to the Requested Items tab and click **Acrobat** to open the Software Catalog record.

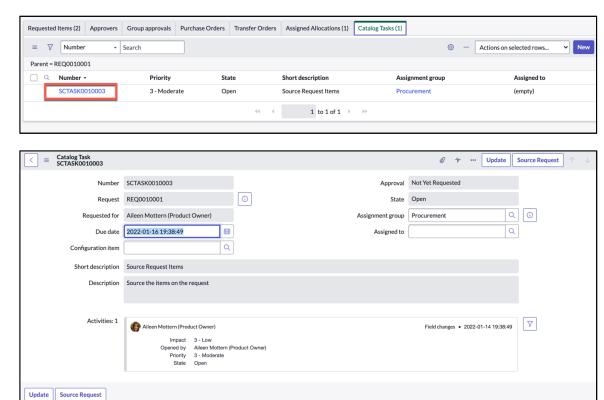**Note:** *The Workflow field is populated with Procurement Process Flow-Auto allocation enabled.*

6. Click the **back** button to return to the Request.

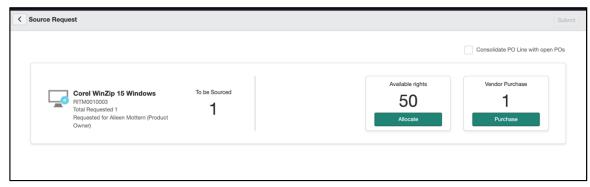7. In the Catalog Tasks related list, open the **task record**.

Section 2 Select sourcing options

Rick needs to review the availability for WinZip 15 and select the appropriate sourcing option.

1. As **Rick Lemm,** on the Catalog Task form, click **Source Request**.

Section 2.1 Purchase license rights

Rick knows that the available rights for Corel WinZip 15 are reserved for use in a project, so he wants to purchase an additional license to fulfill Aileen's request.

1. For Corel WinZip 15 Windows, click **Purchase**.

2. Complete the additional Purchase Order fields as follows:
   - Vendor: **Amazon ($65.00)**
   - Metric Group: **Common**
   - License Metric: **Per User**
   - Quantity: **1**
   - Destination Stockroom: **San Diego Border – Pickup/Dropoff**

3. Destination Stockroom is required but does not affect anything in the software process.

4. Click **Submit**.

5. When the Source Request message is displayed, read it and click **OK**.

Section 3 Order license rights

The ServiceNow Procurement product has been integrated with the CloudD purchasing system. Rick has been granted rights to submit orders from Procurement to the purchasing system. Once the order has been received by the purchasing system, it will be reviewed by a purchasing administrator before the purchase order is provided to the vendor.

1. As **Rick Lemm**, on the request record, open the purchase order under the **Purchase Orders** related list.

2. Review the Purchase Order details and then click **Order**.

Section 4 Receive license rights

Normally there is some time between when you place the order and receive it. Here you do it together for lab expediency. Rick needs to receive the software right for Corel WinZip and allocate it before it can be deployed.

1. As **Rick Lemm** on the Purchase Order form, click **Receive**.

2. Enter **SAM90003** in the Asset Tag field of the Receive Purchase Order form.

3. Click the **Capture License Keys** button next to Receiving Rights field (shown above).

4. Click **Insert a new row**.

5. Enter a License Key of **1357-2468-0864**.
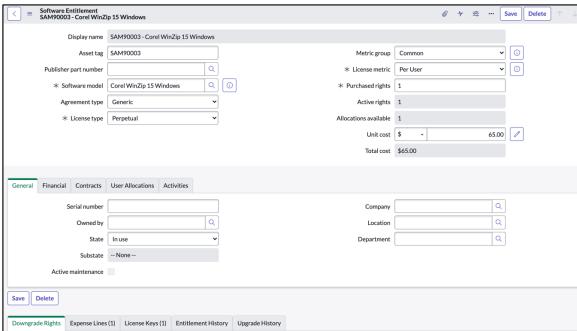

6. Click **Done**.

7. Click **Submit**.

8. Under the **Assets** related list, click **SAM90003**.

	Asset tag	Model category	Display name	Assigned to	Company	State	Substate	Cost	Configuration Item
	SAM90003	Software License	Corel WinZip 15 Windows	Aileen Mottern (Product Owner)	(empty)	In use		$65.00	(empty)

1 to 1 of 1

Software Entitlement
SAM90003 - Corel WinZip 15 Windows

Display name	SAM90003 - Corel WinZip 15 Windows			
Asset tag	SAM90003	Metric group	Common	
Publisher part number		✳ License metric	Per User	
✳ Software model	Corel WinZip 15 Windows	✳ Purchased rights	1	
Agreement type	Generic	Active rights	1	
✳ License type	Perpetual	Allocations available	1	
		Unit cost	$	65.00
		Total cost	$65.00	

General Financial Contracts User Allocations Activities

Serial number		Company		
Owned by		Location		
State	In use	Department		
Substate	-- None --			
Active maintenance	☐			

Save Delete

Downgrade Rights Expense Lines (1) License Keys (1) Entitlement History Upgrade History

9. On the **User Allocations** tab, allocate this entitlement:
   - Assigned to: **Aileen Mottern**
   - Quantity: **1** (default)
   - License key: **1357-2468-0864**

General Financial Contracts **User Allocations** Activities

Assigned condition — Add Filter Condition — Add "OR" Clause

-- choose field -- — -- oper -- — -- value --

User Allocations

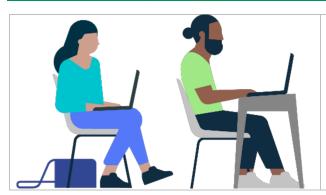|	Assigned to	Quantity	License key
✕ ✎	Aileen Mottern (Product Owner)	1	1357-2468-0864
+	Insert a new row...		

10. To easily select the license key created in step #5 above, double-click the License key field and click on the magnifying glass.

11. Click **Save**.

Congratulations! You have completed this lab!

You are now ready to begin learning about Software Remediation.

Lab takeaways

- What is the value of activating the ServiceNow Procurement plugin?

- When might you order additional licenses if you have license rights available?