

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 1.1 and 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**.



Request REQ0010001

Update Cancel Request Copy Delete

Number REQ0010001

Requested for Aileen Mottern (Product Owner)

Location

Due date 2022-01-16 19:38:47

Price \$209.99

Opened 2022-01-14 19:38:48

Opened by Aileen Mottern (Product Owner)

Approval Approved

Request state Approved

Sourced

Update Cancel Request Copy Delete

Related Links

Show Workflow

Requested Items (2) Approvers Group approvals Purchase Orders Transfer Orders Assigned Allocations (1) Catalog Tasks (1)

Number Search

Request = REQ0010001

Number	Quantity	Catalog	Item	Due date	Price	Assigned to	Stage
RITM0010002	1	(empty)	Acrobat	2022-01-16 19:38:47	\$139.99	(empty)	▶ ⏹ ⏸ ⏸ ⏸
RITM0010001	1	(empty)	Corel WinZip 15 Windows	2022-01-16 19:38:47	\$70.00	(empty)	▶ ⏹ ⏸ ⏸ ⏸

1 to 2 of 2

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

Requested Items (2)	Approvers	Group approvals	Purchase Orders	Transfer Orders	Assigned Allocations (1)	Catalog Tasks (1)
Number Search						
Request No = REQ0010002						
Number	Allocated to	Assigned on	Assigned to	Task	Allocation	
ASL0001002	(empty)	2022-01-18 20:20:35	Aileen Mottern (Product Owner)	SCTASK0010006	(empty)	
1 to 1 of 1						

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

The screenshot shows a table with columns: Number, Quantity, Catalog, Item, Due date, Price, Assigned to, and Stage. The first row is highlighted with a red box around the 'Acrobat' item name. The second row shows 'Corel WinZip 15 Windows'.

Number	Quantity	Catalog	Item	Due date	Price	Assigned to	Stage
RITM0010004	1	(empty)	Acrobat	2022-01-20 20:20:32	\$139.99	(empty)	▶ ✓ ↻ ○ ○ ○
RITM0010003	1	(empty)	Corel WinZip 15 Windows	2022-01-20 20:20:32	\$70.00	(empty)	▶ ✓ ↻ ○ ○

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

The screenshot shows the 'Software Acrobat' catalog record form. The 'Workflow' field is highlighted with a red box and contains the value 'Procurement Process Flow - Auto :'. Other fields include Name, Product ID, Price, Recurring price, Recurring price frequency, Omit price in cart, List Price, Cost, Vendor, Rank tier, Model, Short description, and Ordered item link.

Software Acrobat

Catalog items are goods or services available to order from the service catalog. Items can be anything from hardware, like tablets and phones, to software applications, to furniture and office supplies.

- Enter a Name and Short description to display for the item.
- Enter a Price, approvals, variables, and other information as needed.

Name: Acrobat

Product ID:

Price: \$ 139.99

Recurring price: \$ 0.00

Recurring price frequency: -- None --

Omit price in cart: ☐

List Price: \$ 0.00

Cost: 139.99

Vendor: Adobe Systems

Rank tier: Valued Partner

Model: Adobe Systems Acrobat DC Professional

Short description: Adobe Acrobat

Ordered item link:

Workflow: Procurement Process Flow - Auto : (highlighted)

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

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

Requested Items (2)		Approvers	Group approvals	Purchase Orders	Transfer Orders	Assigned Allocations (1)	Catalog Tasks (1)	
<div><div>≡</div><div>▽</div></div>		Number	-	Search	<div><div>⊙</div><div>—</div></div>		Actions on selected rows...	New
Parent = REQ0010001								
<input type="checkbox"/>	Number	Priority	State	Short description	Assignment group	Assigned to		
	SCTASK0010003	3 - Moderate	Open	Source Request Items	Procurement	(empty)		
<div><div>◀◀</div><div>◀</div><div>1</div><div>to 1 of 1</div><div>▶</div><div>▶▶</div></div>								

Catalog Task
SCTASK0010003

NumberSCTASK0010003

RequestREQ0010001

Requested forAileen Mottern (Product Owner)

Due date2022-01-16 19:38:49

Configuration item

Short descriptionSource Request Items

DescriptionSource the items on the request

ApprovalNot Yet Requested

StateOpen

Assignment groupProcurement

Assigned to

Activities: 1

Aileen Mottern (Product Owner)

Impact3 - Low

Opened byAileen Mottern (Product Owner)

Priority3 - Moderate

StateOpen

Field changes • 2022-01-14 19:38:49

Update

Source Request

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**.

Catalog Task
SCTASK0010003

Number: SCTASK0010003
Request: REQ0010001
Requested for: Aileen Mottern (Product Owner)
Due date: 2022-01-16 19:38:49
Configuration item: [Search]
Short description: Source Request Items
Description: Source the items on the request

Approval: Not Yet Requested
State: Open
Assignment group: Procurement
Assigned to: [Search]

Activities: 1
Aileen Mottern (Product Owner)
Impact: 3 - Low
Opened by: Aileen Mottern (Product Owner)
Priority: 3 - Moderate
State: Open
Field changes • 2022-01-14 19:38:49

Update Source Request

Source Request

Consolidate PO Line with open POs

Item Details	To be Sourced	Available rights	Vendor Purchase
 Corel WinZip 15 Windows RITM0010003 Total Requested 1 Requested for Aileen Mottern (Product Owner)	1	50 Allocate	1 Purchase

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**

The screenshot shows a web form titled "Source Request" with a "Submit" button in the top right corner. A checkbox labeled "Consolidate PO Line with open POs" is present. The main content area displays product information for "Corel WinZip 15 Windows" (P/N: 140010003) with a "To be Sourced" quantity of 1. It shows "Available rights" of 50 and a "Vendor Purchase" of 1, each with an "Allocate" or "Purchase" button. Below this is a "Purchase Order (1)" section with a table of fields: Vendor (Amazon (\$65.00)), Metric Group (Common), License Metric (Per User), Quantity (1), and Destination Stockroom (San Diego Border - Pickup/Dropoff).

Purchase Order (1)				
Vendor	Metric Group	License Metric	Quantity	Destination Stockroom
Amazon (\$65.00)	Common	Per User	1	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**.

STRY040502 – Order and receive license rights

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.

Requested Items (2) Approvers Group approvals Purchase Orders (1) Transfer Orders Assigned Allocations (1) Catalog Tasks (1)							
Purchase Orders							
<input type="checkbox"/>	Number	Vendor	Assigned to	Status	PO date	Due by	Total cost
<input type="checkbox"/>	PO0010002	Amazon	(empty)	Requested	2022-01-27 19:49:43	2022-01-20 20:20:32	\$65.00

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

Purchase Order PO0010002

Number PO0010002

Due by 2022-01-20 20:20:32

Vendor Amazon

* Ship to San Diego Border - Pickup/Dropoff

Short description

PO date 2022-01-27 19:49:43

Status Requested

Assigned to

Bill to

Shipping -- None --

Terms -- None --

Description

Ship rate \$ 0.00

Total cost \$65.00

Update Cancel Order Delete

Purchase order line items (1) Assets Receiving Slips

Number

Search

Purchase order = PO0010002

<input type="checkbox"/>	Number	Product Model	Product Catalog	Part number	Status	Cost
<input type="checkbox"/>	POL0010002	Corel WinZip 15 Windows	Corel WinZip 15 Windows	AMZ-CWZ15	Requested	\$65.00

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.



Purchase Order PO0010002

Corel WinZip 15 Windows
Amazon
Total Requested 1

Asset Tag: SAM90003

Serial Number:

License Metric: Per User

Remaining Rights: 1

Unit Cost:

Receiving Rights:

Capture License Keys

3. Click the **Capture License Keys** button next to Receiving Rights field (shown above).
4. Click **Insert a new row**.

Capture License Keys

License Key

+ Insert a new row.

Cancel Done

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

Capture License Keys

License Key

1357-2468-0864

+ Insert a new row.

Cancel Done

6. Click **Done**.
7. Click **Submit**.

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

Purchase order line items (1) Assets (1) Receiving Slips (1)									
for text Search Actions on selected rows...									
Assets	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?