



2017 FINANCIAL MANAGEMENT CONFERENCE

NIST ServiceNow Projects

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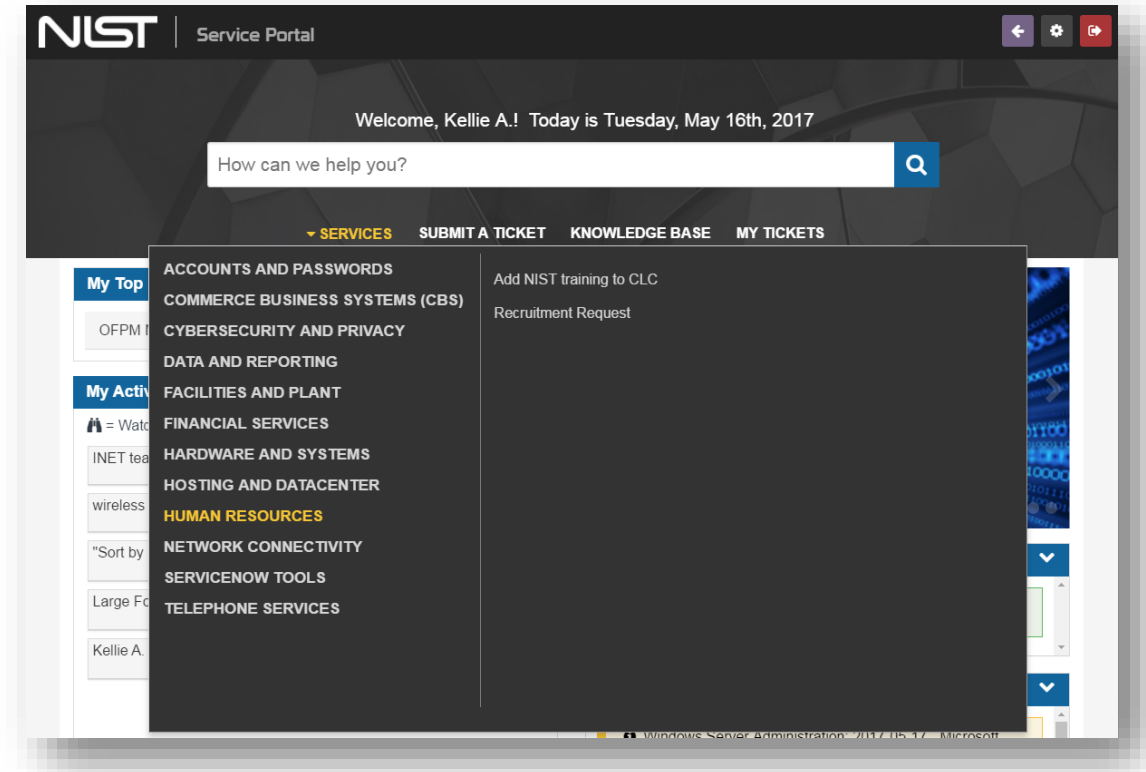
■ Project Goals

- Three areas were identified to participate in ServiceNow implementation projects: **Human Resources, Acquisitions and Agreements.**
- *The basic goals for all three projects were to:*
 - automate process workflow,
 - provide transparency and self-service options to the requesters to track the status of requests, and
 - to establish and track service delivery baselines and capture metrics.



■ What is ServiceNow?

- ServiceNow is development platform used to automate the flow of work and streamline and manage the delivery of services.
- ServiceNow was originally focused on the delivery of IT services only, but now can be used for any type of service.
- Requests are initiated through online submission form.





Features and Highlights

All services are requested through an online form.

HR Recruitment

The screenshot shows the 'HR Recruitment' form. At the top, it says 'Welcome to HR STAT (Submission, Tracking, and Analytics Tool)'. Below this is a note: 'An important note before you begin: • DO NOT attach documents with Personally Identifiable Information (PII) (i.e. Resume and DF-305)'. The form includes fields for 'Preparer Name' (Kellie A. Beall) and 'Hiring Manager'. There are sections for 'Additional comments (Customer visible)', 'Position Information', 'Assessment Information', and 'Work Space Information'. Each section has a dropdown menu and a 'Watch list' icon.

Agreements

The screenshot shows the 'Agreements' form. At the top, it says 'Agreement Action: R27-724-0002'. Below this is a section titled 'IN THIS ACTION' with a list of instructions: '• Requests for review may include multiple elements, such as, a new agreement, amendments, extensions, and/or modifications to orders.', '• Modifications and Orders are only available when using the Standard Offer ID items.', '• Users can REVERSE an award by scrolling down to the relevant TAB at the bottom of the record, selecting the element to be removed with the checkbox to the left, dragging over the "Reverse" or "Cancel" icon, and selecting "Yes".'. The form includes fields for 'Agreement Number', 'Request Type', 'Sponsor Agreement Number', 'Availability', 'Urgent Review', 'Request Type', 'Status', 'Requester', 'Ticket Collaborator', 'Technical Point of Contact', and 'Parent Offer ID'.

Acquisitions

The screenshot shows the 'Simplified Acquisition Wizard' form. At the top, it says 'Welcome to CAST (Customer Acquisition Self-Service Tool)'. Below this is a section titled 'WHAT IS THIS TOOL USED FOR?' with a description: 'This web-based "wizard" is a tool that, upon completion, provides the user with the information needed to prepare an appropriate Procurement Request Package for subsequent submission through C-Response, including links to required document templates. This tool cannot be used to actually submit a Procurement Request Package. All packages must still be submitted through C-Response.'. The form includes a 'Procurement Type' dropdown and a 'What is the total anticipated value of the purchase including option years?' dropdown.

HR Recruitment

The purpose of the tool is to allow a Hiring Manager (or “preparer”) to submit a request for a new recruitment action, and facilitate the processing and tracking of that action through completion.

Status Tracking

- Hiring Managers can track the status of the recruitment through the self-service portal.

The screenshot displays a list of HR Recruitment actions. The selected item is 'HR Recruitment: Administrative Office Assistant (OA)' with ID 57-2017-0098 and a status of 'PACKAGE REVIEW'. Below the list, a progress bar shows the stages of the recruitment process: DRAFT, CIO REVIEW, PACKAGE REVIEW (current), DRAFT ANNMT, VACANCY OPEN, and EVALUATION. Below the progress bar, there are buttons for 'PROVIDE UPDATE' and 'VIEW DETAILS'. An orange arrow points to the 'PACKAGE REVIEW' status in the list.

HR Recruitment: Electronics Technician	57-2017-0100 11/04/2016 Status: PACKAGE REVIEW
HR Recruitment: Administrative Office Assistant (OA)	57-2017-0098 11/04/2016 Status: PACKAGE REVIEW
DESCRIPTION: Administrative Office Assistant (OA)	PROVIDE UPDATE
RECENT UPDATE:	VIEW DETAILS
DRAFT > CIO REVIEW > PACKAGE REVIEW > DRAFT ANNMT > VACANCY OPEN > EVALUATION	
TENTATIVE OFFER > FINAL OFFER > COMPLETE	
HR Recruitment: Administrative Office Assistant (OA)	57-2017-0096 11/04/2016 Status: PACKAGE REVIEW
HR Recruitment: IT Specialist (Security) (interdisciplinary)	57-2017-0095 11/04/2016 Status: PACKAGE REVIEW



HR Recruitment

Dashboards and Ticket Listings

- Dashboards allow users to quickly view pending recruitment status and other filters.

HR Recruitment

- ☆ Create New
- ★ Assigned to my ORG
- ☆ My Tickets
- ☆ HR STAT Dashboard for SMAs
- ▼ Reports
- ☆ Pending Actions
- ☆ Closed Actions

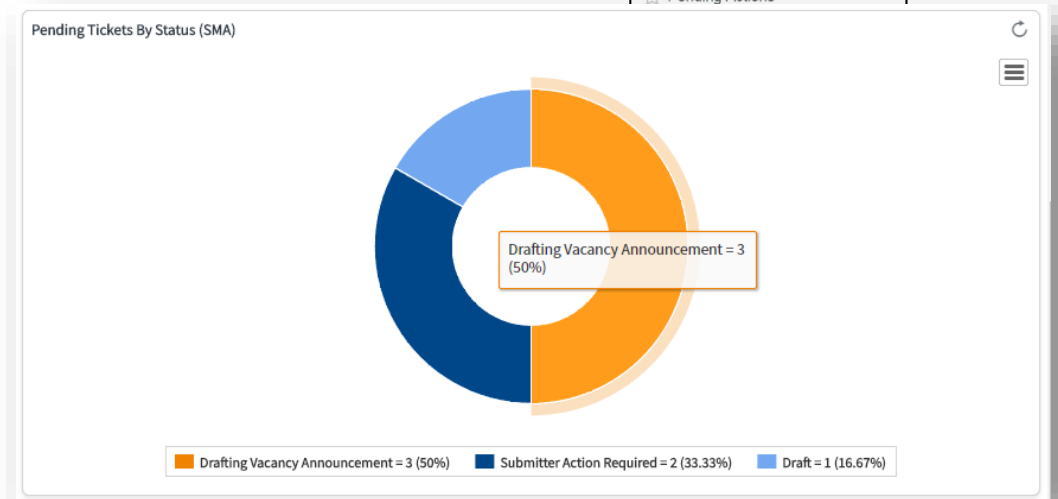
The menu that gives the user easy access to filtered ticket listings. Clicking on the record number of a ticket in the listing will open the ticket.

Number	Position Title(s) - (include all that apply)	Current Status	HR Specialist	Hiring Manager	Preparer Name	Stage
57-2017-0238	IT Specialist (Internet)	Submitter Action Required	Shelley T. Moeller	Gail Porter	Amy B. Tasker	▶ ✓ ○ ○ ○ ○ ○ ○ ○ ○
57-2017-0239	IT Specialist (Internet)	Drafting Vacancy Announcement	Shelley T. Moeller	Philip Kemp	Amy B. Tasker	▶ ✓ ✓ ✓ ○ ○ ○ ○ ○ ○ ○ ○
57-2017-0263	Student Trainee (Engineering)	Submitter Action Required	Shelley T. Moeller	testESS.jp	testESS.el	▶ ✓ ○ ○ ○ ○ ○ ○ ○ ○

Clicking on graphs in the dashboard will drill down into the data shown in the graph.

HR Recruitment

- ☆ Create New
- ☆ Assigned to my ORG
- ☆ My Tickets
- ★ HR STAT Dashboard for SMAs
- ▼ Reports
- ☆ Pending Actions



HR Recruitment

Workflow

- Workflow is driven by “Tasks” and “Approvals”.
- The assignee receives an email at the time of the assignment with detailed instructions.
- All Approvals and Tasks appear at the bottom of the ticket in the “Approvers” or “Recruitment Tasks” Tabs.

Related Links
Show Workflow

Recruitment SLA (3) **Approvers (2)** Recruitment Tasks (1) Documents HR Recruitments Attachments (1) Cancel Recruitments

Approvers New Edit... Go to State Search 1 to 2 of 2

Approval for = 57-2017-0062

State	Approver	Workflow activity	Description	Updated
Approved	Laura Hudson	HR Specialist Package Review		2016-10-26 13:23:51
Requested	Paul A. Williams	Hiring Managers approval of announcement...		2016-10-26 13:27:22

Actions on selected rows...

Recruitment SLA (6) Approvers (5) **Recruitment Tasks (4)** Documents (3) HR Recruitments (1) Attachments (3) Cancel Recruitments

Recruitment Tasks New Edit... Go to Number Search 1 to 4 of 4

Parent = 57-2017-0001

Number	State	Assigned to	Short description	Updated
HRREC0001224	Closed Complete	Shelley T. Moeller	HR Specialist drafts announcement and targeted hiring timeline	2016-10-03 17:17:27
HRREC0001225	Closed Complete	Shelley T. Moeller	HR Specialist posts announcement	2016-10-03 17:21:36
HRREC0001226	Closed Complete	Shelley T. Moeller	HR Specialist Reviews Applications	2016-10-03 17:24:10
HRREC0001227	Closed Complete	Shelley T. Moeller	HR Specialist enters finalizes cert and enters Cert Due Date	2016-10-03 17:31:23

Actions on selected rows...



HR Recruitment

Action Required by Requester

- When the Current Status of the request reads “*Submitter Action Required*”, the Preparer/Hiring Manager has been sent an email notification requesting action.
- The request will remain in that status until it is updated and resubmitted to HR.

HR Recruitment: Electronics Technician 57-2017-0100 | 11/07/2016 | Status: **SUBMITTER ACTION REQUIRED**

DESCRIPTION: Electronics Technician

RECENT UPDATE: 2016-11-07 15:18:12 - Kellie A. Beall (Additional comments (Customer visible))
Please attach an SF-52, Request for Personal Action Request to your recruitment request and resubmit.

PROVIDE UPDATE
VIEW DETAILS

DRAFT CIO REVIEW PACKAGE REVIEW DRAFT ANNMT VACANCY OPEN EVALUATION
TENTATIVE OFFER FINAL OFFER COMPLETE

HR Recruitment - 57-2017-0100

Cancel Recruitment Re-Submit Save Copy HR Record

Manage Attachments (1): CD516.docx [rename] [view]

HR Specialist: Kellie A. Beall

* Preparer Name: testESS ctl

Current Status: Submitter Action Required

Hiring Manager: testESS cnst

Additional comments (Customer visible)

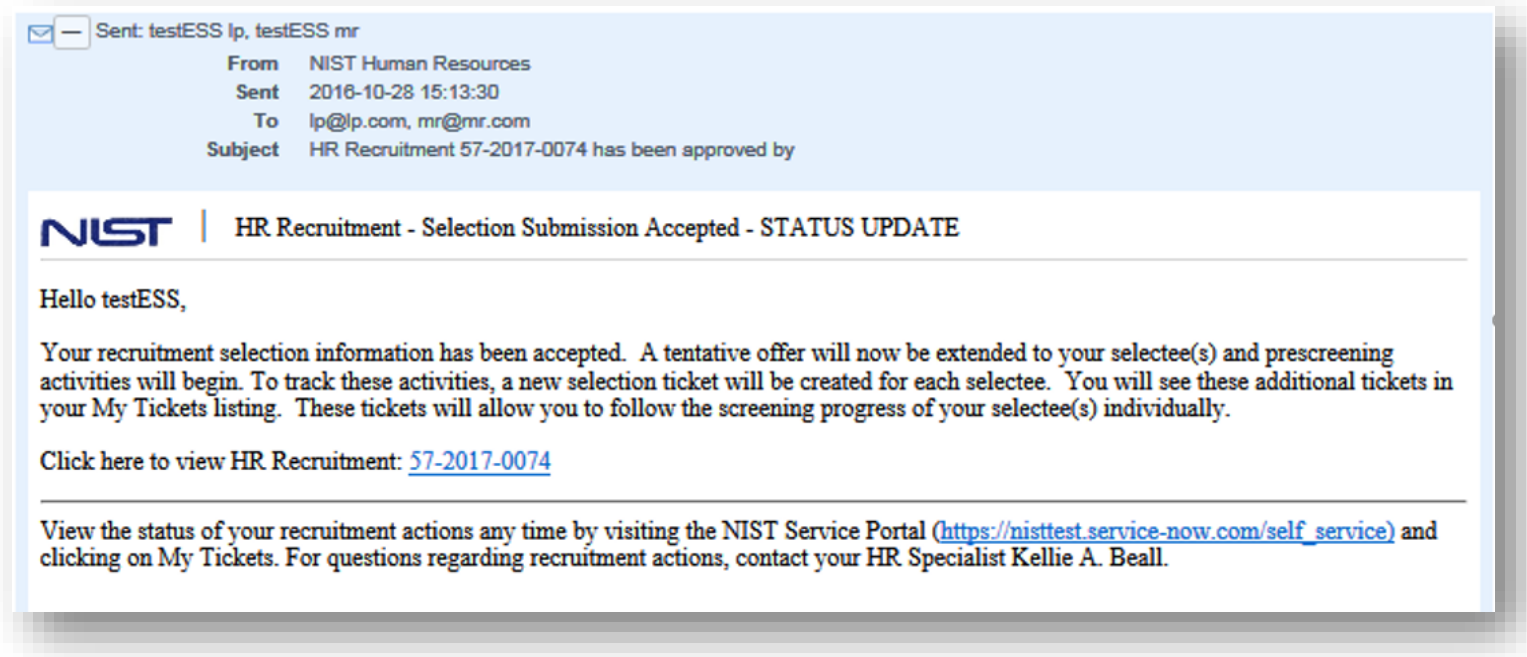
Additional buttons appear as needed, for example, a “Certificates Completed” button appears when waiting for the Hiring Manager to indicate completion of all certificate actions.



■ HR Recruitment

Notifications

- As the workflow moves forward, automatic email notifications are sent by the system to appropriate parties, and logged in the ticket within the main ticket History.



Agreements

The purpose of the Reimbursable and Payable Agreements Review application in the ServiceNow platform is to automate the process of reviewing draft agreements and clearing them for execution.

- Online request forms gather data to:
 - ✓ Reporting and metrics,
 - ✓ Determining required reviews and workflow, and/or
 - ✓ Providing key information to the reviewers to aid them in their review tasks.

The image shows a screenshot of a ServiceNow form titled "Research, Testing or Acquiring Data on Human Subjects". The form includes several fields: "Availability" (set to "Divisions (Only Certain Divisions)"), "Division(s)" (686, 688), "Lead Division" (687), "Urgent Review?" (Yes), "Need by Date", and "Reason for Urgent Review" (Must attach Urgent Review Justification Memo). A callout box highlights the "Research, Testing or Acquiring Data on Human Subjects" field, which has a question mark icon. The callout box contains the following text: "Research, Testing or Acquiring Data on Human Subjects. Human subject - means a living individual about whom an investigator conducts research that data through intervention or interaction with the individual, or (2) identifiable private information research involving human subjects, NIST requires review and approval of documentation by the Institutional Review Board (IRB). Consult the NIST Human Subjects Protection Office PRIOR to your agreement for review. See <https://inet.nist.gov/hspo> for more information."

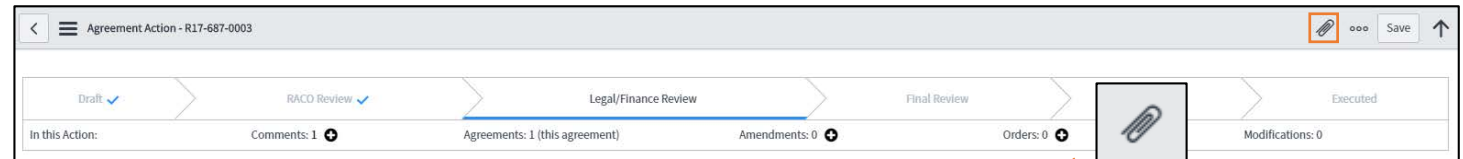
Additional information about fields in the form can be viewed by clicking the question mark (?) icon.



Agreements

Document Repository

- All review requests require attached documents.
- Each time a new request is created, a document repository is also created.
- The repository has version control.



Agreements Repository

+ new document or drag files here

✓	Name	DocType	Version	Comments	Approval Status	Modified	Modified By	Created	Created By
	NIST_7600B_IAA_Template	...	- select one-	1.0	Pending	4 days ago	<input type="checkbox"/> Beall, Kellie A. (Fed)	4 days ago	Beall, Kellie A. (Fed)
	NIST_7600A_IAA_Template	...	- select one-	1.0	Pending	4 days ago	<input type="checkbox"/> Beall, Kellie A. (Fed)	4 days ago	Beall, Kellie A. (Fed)
	NIST_SOW_IAA_Template	...	- select one-	1.0	Pending	4 days ago	<input type="checkbox"/> Beall, Kellie A. (Fed)	4 days ago	Beall, Kellie A. (Fed)

ATTACHMENT 2: Additional NIST Terms and Conditions

NIST support Program

1. NIST contractors and their employees may perform incidental work under this agreement. Intellectual property developed by such contractors/employees is governed by the FAR clauses contained in the NIST contract, which include the right of the contractor to elect to retain ownership of inventions under the Bayh-Dole Act (35 U.S.C. § 200 *et seq.*), and possible contractor ownership of data rights. NIST expects that approximately \$100,000 will be transferred to contractors to perform incidental work under this agreement, and the parties agree that should this estimate change, the estimate will be revised through an exchange of emails which will be retained in the official agreement file.
2. No students or U.S. citizens working under a NIST financial assistance award made under the authority of 15 U.S.C. 278g-1 will perform work under this agreement.
3. No employee or agents of recipients working under a NIST financial assistance award will perform work under this agreement.



■ Agreements

Stages and Status

- The progress of the workflow is captured and displayed with request status and request stage.
- The **STAGES** of the workflow convey the *major steps* in the process.
- The **STATUS** of the request conveys which review group is currently working to complete a review task or approval.



- ▼ RACO Review (Completed)
- Legal/Finance Review Waiting for Create RACO Task: DOC GLD Review (In progress)
- Final Review (Pending - has not started)
- Cleared (Pending - has not started)
- Executed (Pending - has not started)

Status	With NIST Finance
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Agreements

Review Comments

- Reviewer comments are recorded in the Comments Tab of the request.
- Expand lengthy entries by rolling over the entry to expose a popup text box.
- Requesters respond to each comment.

The screenshot displays a 'Comments' table with the following columns: Issue Area, Issue Category, Issue Location, Comment, Issue Status, Commenter Name, Commenter Group, and Submitter Response. The table contains several rows of data, including entries for 'General - Missing/insufficient descripti...', 'Legal - Inconsistent Provisions', 'Legal - Characterize work as sale of a N...', and 'Legal - Required Clauses Missing or Revised - Full Reimbursement'. A popup menu is shown over the 'Legal - Required Clauses Missing or Revised - Full Reimbursement' entry, displaying a dropdown for 'Issue Category' with options 'Required', '-- None --', 'Required', and 'Recommended'. The 'Required' option is selected. A red box highlights the 'Insert a new row...' button at the bottom of the popup.

Issue Area	Issue Category	Issue Location	Comment	Issue Status	Commenter Name	Commenter Group	Submitter Response
General - Missing/insufficient descripti...	Required	SOW		Corrected by OU	Karen Yavetz	DOC GLD	
Legal - Inconsistent Provisions	Required	7600B		Pending	Rajesh B. Nair	NIST OCC	
Legal - Characterize work as sale of a N...	Required	SOW		Pending	Rajesh B. Nair	NIST OCC	
Legal - Required Clauses Missing or Revised - Full Reimbursement	Required	Document appears to be missing		Pending	Manuel (Manny) Lee-Llacer	NIST Finance Reimbursables	
Legal - Required Clauses Missing or Revi...	Required	Document appears to be missing	Docum				
Legal - Required Clauses Missing or Revi...	Required	7600B					
Legal - Incorrect or missing authority,...	Required	7600A					
+ Insert a new row...							



Acquisitions

The purpose of the Simplified Acquisitions application in the ServiceNow platform is to provide requesters with transparency and self-service options for tracking the status of their procurement request.

Metrics and Reporting

- Average time to complete by Contract Specialist and Operating Unit

Acquisition Average Status Duration by Contract Specialist and OU

Contracting Specialist	Number	Value	Accepted-Pre Solicitation					Awarded		Evaluation				In Review				Pre-award Preparation				Rework	Solicitation				Average		
			OU Number	18	61	67	73	77	OS	18	61	18	61	73	77	18	61	67	73	77	18	61	73	77	61	18		61	73
▶ Adam Powell	Total			6 Minutes	0 Seconds		7 Minutes		7 Minutes		13 Minutes		58 Seconds		0 Seconds	0 Seconds	9 Days 19 Hours		10 Minutes		1 Minute		0 Seconds	4 Minutes		11 Hours 50 Minutes		2 Minutes	8 Hours 7 Minutes
▶ Amber Gray	Total					0 Seconds						1 Minute						1 Second				0 Seconds					4 Minutes	1 Minute	
▶ Carol Wood	Total							1 Day 19 Hours 16 Minutes		11 Minutes				4 Hours 29 Minutes											3 Hours 58 Minutes			19 Hours 26 Minutes	
▶ Divya Langhnoja	Total						0 Seconds																					0 Seconds	
Average			2 Days 20 Hours 28 Minutes	6 Minutes	0 Seconds	0 Seconds	7 Minutes	0 Seconds	1 Day 19 Hours 16 Minutes	7 Minutes	11 Minutes	13 Minutes	1 Minute	58 Seconds	3 Hours 51 Minutes	0 Seconds	9 Days 19 Hours	1 Second	10 Minutes	12 Seconds	1 Minute	0 Seconds	0 Seconds	4 Minutes	3 Hours 58 Minutes	11 Hours 50 Minutes	4 Minutes	2 Minutes	10 Hours 41 Minutes





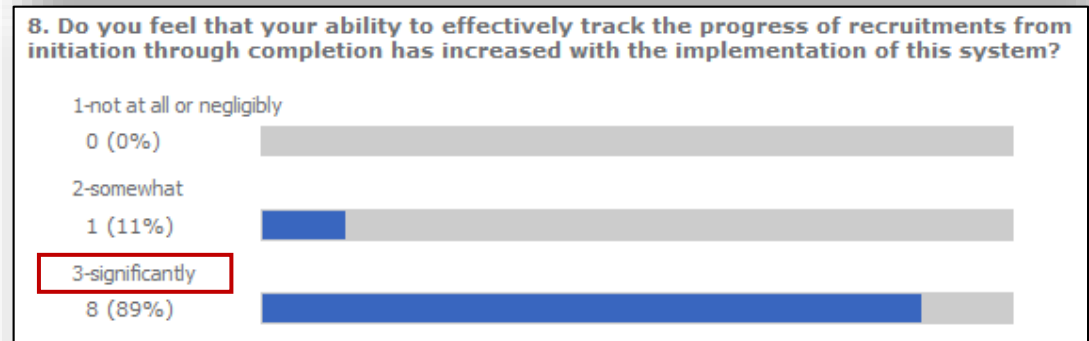
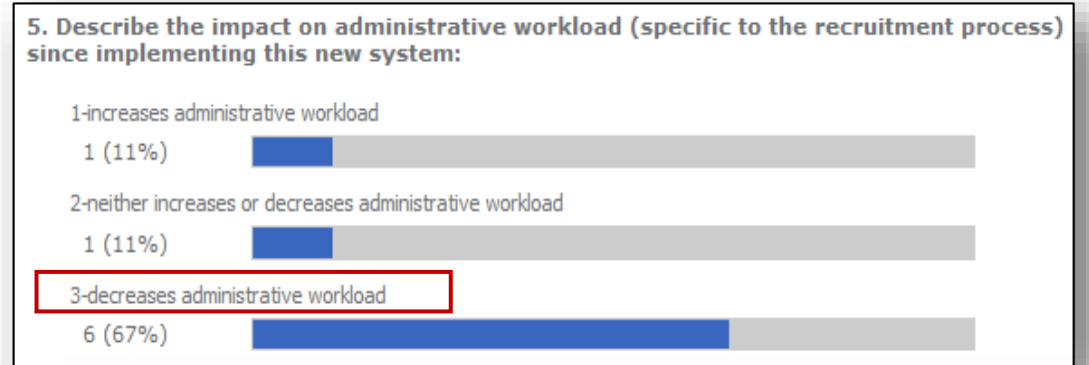
Is it working for us?

Only the HR recruitment has launched
(Agreements and Acquisitions to launch this FY.)

- HR Recruitment go live: 11/17/2016
- FY17 Q2 Hiring Manager Satisfaction Survey Results
 - ✓ NIST's overall satisfaction score was 8.5/10 (1=poor, 10=excellent). This exceeded both the DOC (7.8) and government-wide (7.5) recruitment satisfaction scores.
- FY17 Q2 Hiring Summary
 - ✓ Completed 146 competitive recruitment actions in Q2. The average time to final offer was 45.6 days. The average time to EOD was 60.4 days.
 - ✓ As a comparison, completed 122 competitive recruitment actions in FY17 Q1. The average time to final offer was 63.5 days. The average time to EOD was 81.6 days.

■ Are we meeting our goals?

- automate process workflow,
- provide transparency and self-service options to the requesters to track the status of requests, and
- to establish and track service delivery baselines and capture metrics.



■ Questions?

