



# Zurich Better Together

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# Solutions

With Solutions, enhance the functionality of ServiceNow applications by using them in combination with each other.

## Available Solutions

Learn more about the benefits of each solution and how to implement and use them.

## Improve visibility into organizational risk exposure with advanced project risk assessment

With advanced risk assessment for your projects, you can easily identify if any projects pose potential organizational risks and quickly decide on mitigating actions. Combine project risk management with enterprise risk management and get better visibility into your organization's overall risk exposure.

### Combined benefits of integrating Project Portfolio Management with Advanced Risk

Feature	Project Portfolio Management	Advanced Risk	Both applications together
Project risk assessment	✓	✗	✓
Elevating to enterprise risk	✗	✗	✓
Assessing inherent and residual risks	✓	✓	✓
Integrated project and enterprise risk registers	✗	✗	✓
Risk heatmaps	✗	✓	✓
Enterprise project risk overview dashboard	✗	✗	✓

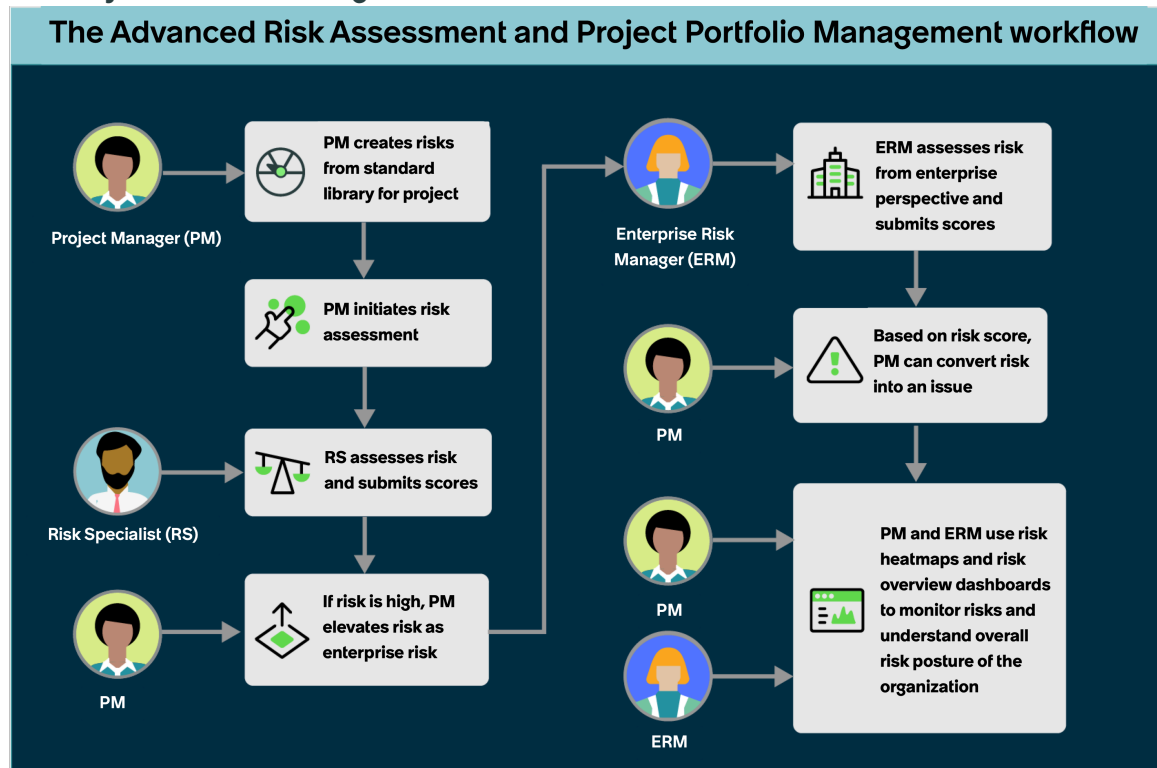
### Workflow of advanced project risk assessment

Use Project Portfolio Management (PPM) and Advanced Risk Assessment (ARA) together for these benefits:

- Monitor your risk exposure at the organization level
- Integrate your risk management system for both project and enterprise risk teams.

The following figure shows an example workflow of how a project manager, risk specialist, and enterprise risk manager use the applications together to assess and mitigate risks both at the project and enterprise level.

## The Project Portfolio Management and Advanced Risk workflow



In this workflow:

1. The project manager creates risks from the standard library for the project and then initiates the risk assessment.
2. The risk specialist assesses the risk and gives it an assessment score.
3. If the risk score is high, the project manager elevates the risk as an enterprise risk.
4. The enterprise risk manager assesses the risk from the enterprise perspective and gives it an assessment score.
5. Based on the risk score, the project manager can convert the risk into an issue.
6. The project manager and enterprise risk manager use risk heatmaps and risk overview dashboards to monitor risks and understand the overall risk posture of the organization.

### Requirements for Project Portfolio Management and Advanced Risk integration

1. Activate the Project Portfolio Management plugin [com.snc.financial\_planning\_pmo].
2. Install the GRC: Advanced Risk application from the ServiceNow® Store.

### Get started with advanced project risk assessment

To get started with assessing your project risks, follow these steps:

1. Setup and configure the risk assessment methodology. See [Configure Project Portfolio Management and Advanced Risk integration](#).

Role: sn\_risk.admin.

2. Define scope and initiate risk assessment. See [Add risks for a project](#).

Role: it\_project\_manager.

3. Perform risk assessment. See [Perform risk assessment](#).

Role: sn\_grc.business\_user.

4. Assess and elevate to project risk. See [Elevate a project risk to enterprise risk](#).

Role: it\_project\_manager.

5. Convert risk to issue and monitor security posture. See [Monitor risk posture](#).

Role: sn\_risk.admin, it\_project\_manager.

## Automating and optimizing your services and operations using Service Operations Workspace

You can expand services while reducing costs, delivering high-quality customer and employee experiences, and driving operational resilience. Use a single cloud platform that integrates IT processes such as incident, problem, and change with IT operations such as discovery, business service definitions, service mapping, and event management.

### Combined benefits of integrating Service Operations Workspace for IT Service Management (ITSM) and IT Operations Management (ITOM)

#### Benefits with Service Operations Workspace for ITSM and ITOM

- Provides a unified experience for services and operations
- Eliminates silos by connecting services and operations teams
- Creates and extends processes using low-code configuration
- Increases productivity and keeps employees engaged
- Optimized processes for faster resolution of outages and incidents

Feature	Service Operations Workspace for ITSM	Service Operations Workspace for ITOM	All applications together
Simple, intuitive, and clear user interface (UI)	✓	✓	✓
Automated recommendations based on user actions	✓	✓	✓

Feature	Service Operations Workspace for ITSM	Service Operations Workspace for ITOM	All applications together
Tailored landing page providing an overview of tasks	✓	✓	✓
Effective incident management for service desk agents	✓	✗	✓
Experts on call for high-priority tasks	✓	✗	✓
Onboarding experience for logged-in users	✓	✓	✓
Walk-up experience	✓	✗	✓
Request management from incidents and interactions	✓	✗	✓
Guided experience for initial configuration of Service Operations Workspace	✓	✗	✓
Presentation of a service's complete context with related metrics, logs, and additional information	✗	✓	✓
Quick remediation for alerts of a service	✗	✓	✓
Quick automation for operators when using an embedded playbook experience within the alert forms	✗	✓	✓

### Workflow for Service Operations Workspace

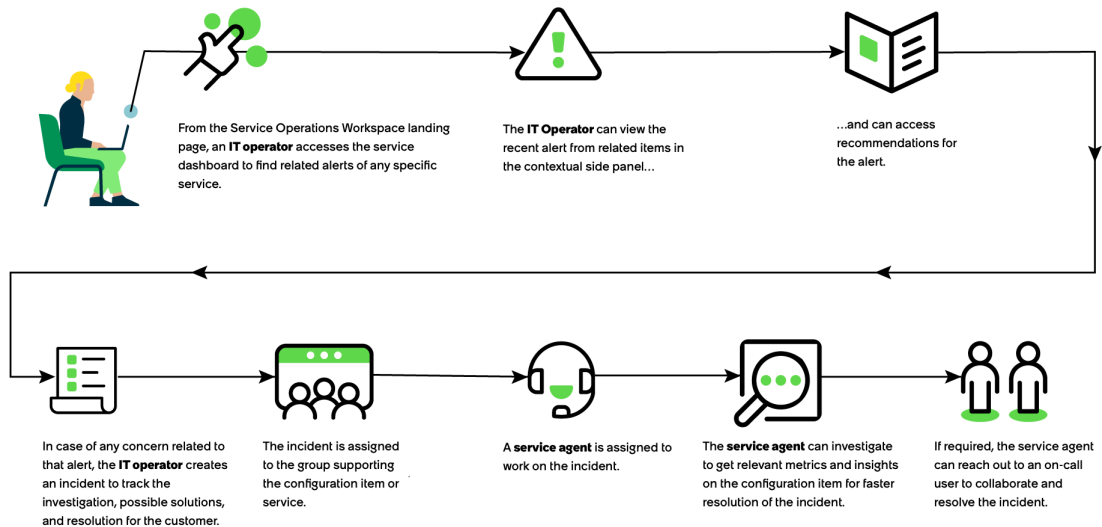
Use Service Operations Workspace for IT Service Management (ITSM) and IT Operations Management (ITOM) together for these benefits:

- Provide a unified experience for services and operations on a single platform.
- Eliminate silos by connecting services and operations teams.
- Increase productivity and keep employees engaged.

- Create and extend ITSM and ITOM processes with low-code configuration.
- Optimize ITSM and ITOM processes for faster resolution of incidents and outages.

The following figure shows an example workflow of how an IT operator and a service agent (service desk agent or L2/L3 specialist) can use these applications to resolve a customer issue.


### Service Operations Workspace for ITSM and ITOM workflow



In this workflow:



1. From the Service Operations Workspace landing page, an IT operator accesses the service dashboard to find related alerts of any specific service.
2. The IT operator can view the recent alert from related items in the contextual side panel.
3. The IT operator can access recommendations for the alert.
4. If there is any customer issue related to that alert, the IT operator creates an incident to track the investigation, possible solutions, and resolution for the customer.
5. The incident is assigned to the group supporting the configuration item or service.
6. A service agent such as a service desk agent or L2/L3 specialist is assigned to work on the incident.
7. The service agent can investigate to get relevant metrics and insights on the configuration item for faster resolution of the incident.
8. If required, the service agent can reach out to an on-call user to collaborate and resolve the incident.

## Requirements for integrating Service Operations Workspace for ITSM and ITOM

1. Ensure that the following conditions are met for Service Operations Workspace for ITSM.
  - a. Procure the ITSM Standard license or later for ServiceNow® IT Service Management applications. Contact your ServiceNow account manager or sales representative.
  - b. If you want to use Investigation Framework within Service Operations Workspace for ITSM, procure the ITSM Professional license or later for ServiceNow® IT Service Management applications.
  - c. Install Service Operations Workspace ITSM Applications from the ServiceNow® Store. For information about installing this application, see [Install Service Operations Workspace ITSM Applications](#).
2. Ensure that the following conditions are met for Service Operations Workspace for ITOM.
  - a. Procure the ITOM Professional license or later for ServiceNow® IT Operations Management applications. Contact your ServiceNow account manager or sales representative.
  - b. Install Service Operations Workspace ITOM Applications from the ServiceNow® Store. For information about installing this application, see [Install Service Operations Workspace for ITOM Applications](#) .


## Get started with Service Operations Workspace for ITSM and ITOM

To get started with Service Operations Workspace for ITSM and ITOM, follow these steps:

1. Configure Service Operations Workspace for ITSM.
  - a. Set up Service Operations Workspace for ITSM. See [Setting up Service Operations Workspace for ITSM](#).  
Role: admin.
  - b. Set up Investigation Framework. See [Setting up Investigation Framework in Service Operations Workspace](#) .
  - Role: admin.
  - c. Configure Recommendation Framework for an incident. See [Configuring Recommendation Framework in Service Operations Workspace for ITSM](#).  
Role: admin.
2. Configure Service Operations Workspace for ITOM.
  - a. Set up Service Operations Workspace for ITOM. See [Setting up Service Operations Workspace for ITOM](#).  
Role: evt\_mgmt\_operator.
  - b. Configure alert metrics. See [Configure alert metrics](#) .
  - Role: evt\_mgmt\_operator.
  - c. Configure the Recommendation Framework for an alert. See [Configuring Recommendation Framework in Service Operations Workspace for ITOM](#).  
Role: evt\_mgmt\_admin.

- d. Configure the Service Operations Workspace inbox. See [Configure the inbox in Service Operations Workspace for ITOM](#).

Role: evt\_mgmt\_admin.

- e. Customize Service Operations Workspace lists. See [Customize lists in Service Operations Workspace for ITOM](#) .

Role: itil.

## Case Study: Enhancing Risk, Compliance, and Audit Management with ITOM

The use case demonstrates how ITOM integration streamlined risk, compliance, and audit management for a financial institution by providing real-time operational visibility, automation, and enhanced risk assessments.

### Problem Statement

A leading financial institution sought to streamline its risk management processes as it grew, handling increasingly complex operational, third-party, and technology risks, along with compliance and internal audit functions. The institution recognized the need for a unified platform to improve efficiency and reduce manual effort.

### Challenges

- **Lack of centralized visibility:** The financial institution faced challenges in maintaining a clear, real-time view of risks, compliance, and audit processes. Disparate systems made it difficult to assess operational risks linked to IT services and infrastructure.
- **Siloed IT infrastructure:** The disconnected IT systems of the institution made it challenging to monitor and respond to operational issues that could affect risk management functions, such as downtimes, configuration errors, and IT service failures.
- **Limited use of existing data:** The significant amount of IT data available from various sources wasn't fully utilized for risk and compliance management due to the lack of integration with existing systems.

### ITOM-specific solutions

- **Real-time operational visibility:** ITOM provided the institution with real-time insights into the health, availability, and performance of IT services. By integrating ITOM with ServiceNow IRM, risk and compliance teams were able to correlate operational risks (e.g., service outages, performance degradation) directly with broader risk management efforts.
- **Automated Service Mapping for better risk assessment:** The Service Mapping capabilities in ITOM enabled the institution to automatically map IT services and understand their dependencies. This was critical for assessing operational risks in real time. For example, the system could detect a critical service failure and immediately flag it as a high-risk event in the compliance dashboard, allowing the institution to take pre-emptive action.
- **Proactive monitoring and alert response:** By leveraging ITOM Event Management, the institution was able to monitor key operational risks, such as system failures and third-party service outages, and trigger automated alerts to relevant risk management and compliance teams. This proactive approach minimized the time between identifying an operational risk and responding to it.

- **Configuration Management Database (CMDB) for Compliance:** The integration of ITOM with the CMDB ensured that all IT assets, configurations, and their relationships were accurately tracked. This provided a single source of truth for risk management, enabling compliance teams to automatically link risks to specific IT assets or services, ensuring more precise risk assessments, especially in the context of technology risks and third-party dependencies.
- **Alert noise reduction and automation:** ITOM AIOps was leveraged to reduce alert fatigue by automatically grouping and correlating related alerts (such as from infrastructure failures). This reduced manual effort for risk and compliance teams to sift through irrelevant alerts, allowing them to focus on higher-priority operational risks.

### Key outcomes

- **Unified Risk and IT operations:** By integrating ITOM with ServiceNow IRM, the institution achieved a unified view of both operational and IT risks. This integration facilitated the identification of risks stemming from operational IT failures, helping the institution quickly address critical alerts before they escalated.
- **Improved efficiency through automation:** ITOM automation helped the institution eliminate manual processes related to operational risk monitoring, such as manually tracking service disruptions or changes in the IT environment that could introduce new risks.
- **Enhanced compliance with IT-Related regulations:** The real-time data provided by ITOM ensured that the institution could meet regulatory requirements around IT risks and audit readiness. The ability of ITOM to keep all IT assets and configurations up to date made audit processes faster and more accurate.
- **Scalability for future risk management needs:** The cloud-native architecture of ITOM provided scalability and flexibility, ensuring that the institution could continue to manage risks as it grew. ITOM also supported mobile access, enabling remote monitoring and alert management by risk and IT teams.

## Track the performance of your IT assets using Hardware Asset Management and Sustainable IT

The Sustainable IT application enables you to effectively manage and monitor the emissions generated by your hardware assets. Additionally, it enables you to keep track of the energy consumption of your assets and their proper disposal after they reach the end of their lifespan.

### Combined benefits of integrating Hardware Asset Management and ESG Management's Sustainable IT

Feature	Hardware Asset Management	ESG Management	All applications together
Hardware asset Inventory Management	✓	✗	✓
Estimate hardware asset energy consumption and emissions	✗	✓	✓
Hardware asset Lifecycle Tracking	✓	✗	✓

Feature	Hardware Asset Management	ESG Management	All applications together
Report reduction in e-Waste	✗	✓	✓
Increase the proportion of Energy Star-certified assets within the portfolio	✗	✗	✓
Track data center energy consumption, carbon, and renewables	✗	✓	✓
Monitor PUE, WUE and CUE from each location for targeted improvement	✗	✗	✓
Track all relevant Sustainable IT metrics at a glance	✗	✗	✓

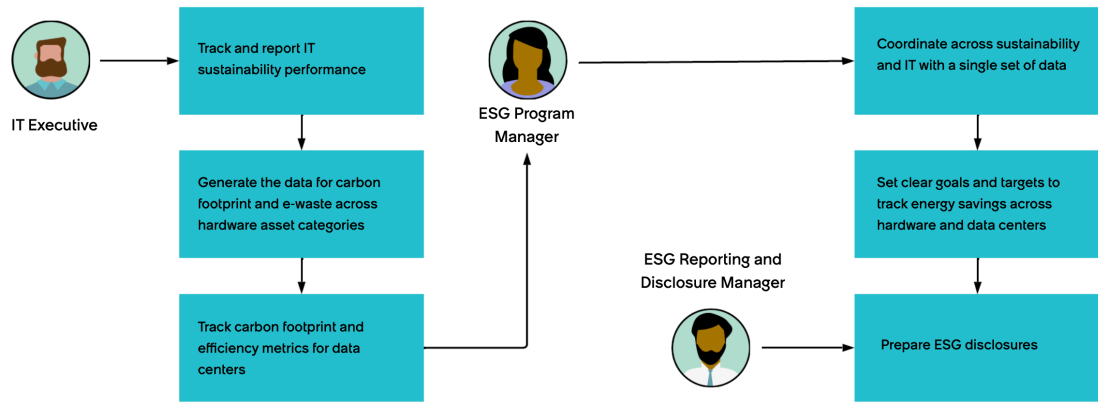
### Workflow for using Hardware Asset Management and Sustainable IT

Using Hardware Asset Management and Sustainable IT applications together provides the following benefits:

- Enables you to effectively manage and monitor the emissions generated by your hardware assets
- Helps you to keep track of the energy consumption of your assets and their proper disposal after they reach the end of their lifespan.
- Provides valuable insights through a dashboard, enabling you to make informed decisions on whether to retire or repurpose these assets

The figure illustrates the collaborative efforts between an IT executive and the Sustainability program manager in collecting data on carbon footprint and e-waste. The ESG program managers establish goals and targets to monitor the efficacy of energy-saving measures and prepare disclosures.

## The Hardware Asset Management and Sustainable IT workflow



In this workflow:

1. The IT executive logs in to the Asset Executive Workspace to track and report the IT sustainability performance.
2. The IT executive then gets the carbon footprint and e-waste generated across different hardware asset categories and tracks the carbon footprint and efficiency metrics for data centers.
3. The ESG program manager coordinates between Sustainability and IT with a single shared set of data.
4. The ESG program managers establish goals and targets to monitor the efficacy of energy-saving measures and thus help the ESG reporting and disclosure manager to prepare disclosures.
5. The ESG reporting and disclosure manager prepares the ESG disclosures.

## Requirements for integrating Hardware Asset Management and ESG Management

1. Install and activate the Sustainable IT (sn\_esg\_sustain) plugin.
2. Install and activate the Hardware Asset Management (sn\_hamp) plugin.

## Get started with using Sustainable IT to track your emissions data from your IT assets

Get started with Sustainable IT by completing these tasks:

1. [Activate the Sustainable IT plugin](#).
2. [Filter and activate the Sustainable IT metric definitions](#).
3. [Create new entities for data centers](#).
4. [Manually set up entities for Sustainable IT data centers](#).
5. [Configure Sustainable IT](#).

## Minimize risk by assessing suppliers during the onboarding process

With Risk Assessments Integration for Supplier Lifecycle Operations, you can identify and assess potential supplier risks when onboarding new suppliers.

### Combined benefits of integrating Supplier Lifecycle Operations with Third-party Risk Management

Feature	Supplier Lifecycle Operations	Third-party Risk Management	All applications together
Supplier onboarding	✓	✗	✓
Information and data management	✓	✗	✓
Case and dispute management	✓	✗	✓
Risk onboarding	✗	✓	✓
Third-party risk due diligence, external and internal risk assessment	✗	✓	✓
Risk intelligence	✗	✓	✓
Risk scoring and monitoring	✗	✓	✓
Risk executive dashboard	✗	✓	✓

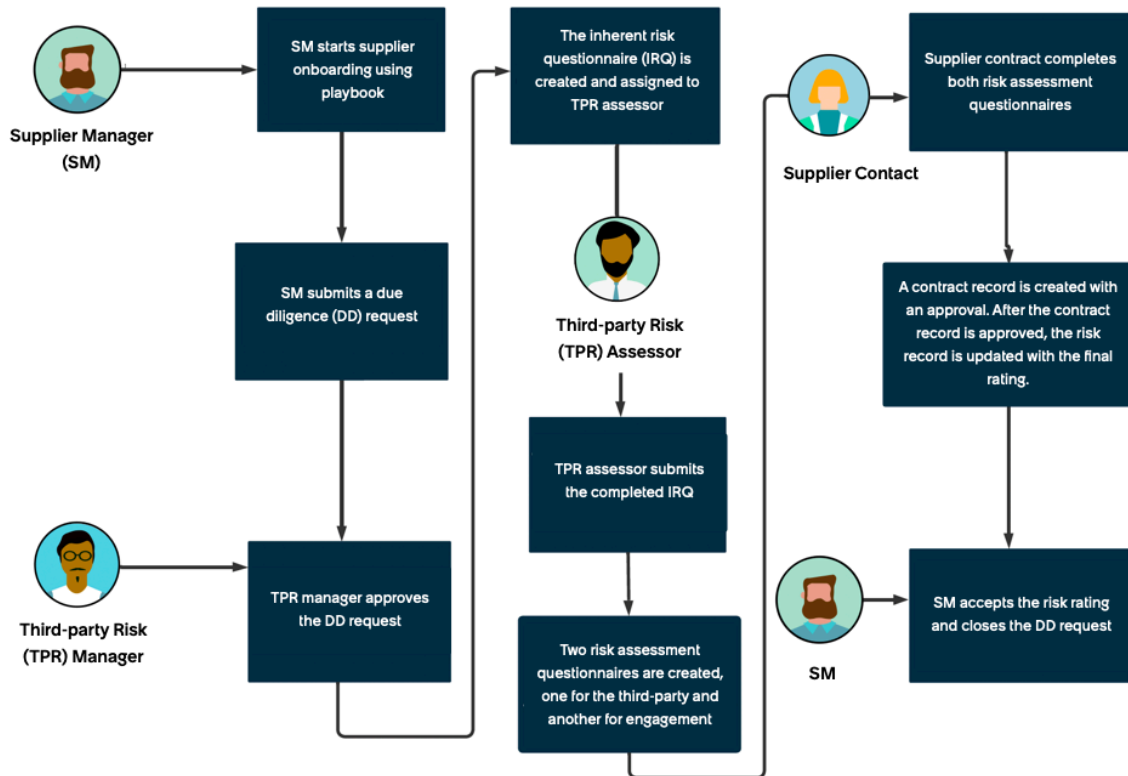
### Workflow of Risk Assessments Integration for Supplier Lifecycle Operations

Use Supplier Lifecycle Operations and Third-party Risk Management together for these benefits:

- Evaluate supplier risk when onboarding suppliers
- Analyze risk score to determine whether to onboard a supplier

The following figure shows an example workflow of how a supplier manager and a third-party risk (TPR) assessor can use the applications together to evaluate supplier risk.

## The Supplier Lifecycle Operations and Third-party Risk Management workflow



In this workflow:

1. The supplier manager receives a supplier onboarding request.
2. The supplier manager uses the onboarding playbook, which provides a streamlined and guided process to onboard suppliers. For more information, see [Use the supplier onboarding playbook to onboard suppliers](#).
3. The supplier manager submits a due diligence request.
 

Performing due diligence is a key aspect of onboarding a supplier. The supplier risk assessment is done by the third-party risk (TPR) assessor. For more information, see [Get started with Risk Assessments Integration for Supplier Lifecycle Operations](#).
4. The TPR manager approves the due diligence request.
5. The inherent risk questionnaire is created and assigned to the TPR assessor.
6. The TPR assessor submits the completed IRQ.
7. Two risk assessment questionnaires are created and assigned to the supplier contact.
8. The supplier contact logs in to the Supplier Collaboration Portal and completes the risk assessment questionnaires.
9. A contract record is created with an approval. After the contract record is approved, the risk record is updated with the final rating.
10. The supplier manager accepts the risk rating and closes the due diligence request.

## Requirements for integrating Supplier Lifecycle Operations and Third-party Risk Management

1. Install the Supplier Lifecycle Operations (com.snc.sn\_supplier\_mgmt) application from the ServiceNow® Store. For more information, see [Install Supplier Case Management](#).
2. Install and activate the Risk Assessments Integration for Supplier Lifecycle Operations (com.snc.sn\_supplier\_tprm) plugin.
3. Install the Third-party Risk Management (com.sn\_vdr\_risk\_asmt) application from the ServiceNow® Store. For more information, see [Configuring Third-party Risk Management](#).
4. Install and activate the GRC: Third-party Due Diligence Request (com.sn\_tprm\_onboarding) plugin.

**Note:** You must have a license for Third-party Risk Management (formerly Vendor Risk Management) to take advantage of this better together solution.

## Get started with Risk Assessments Integration for Supplier Lifecycle Operations

Get started with Risk Assessments Integration for Supplier Lifecycle Operations by completing these tasks:

1. Create a supplier. For more information, see [Create a supplier from the Source-to-Pay Workspace](#).
2. Onboard a new supplier using playbooks. For more information, see [Use the supplier onboarding playbook to onboard suppliers](#).
3. The playbook creates a due diligence request. For more information about the fields in this activity, see [Request due diligence for a third-party engagement](#).
4. The supplier manager fills and submits a due diligence request, which is assigned to the TPR manager.
 

**Note:** For each due diligence request, the system auto-assigns a unique ID number that starts with the prefix **DDR**.
5. If the due diligence request is approved by the TPR manager, the inherent risk questionnaire (IRQ) is sent to the TPR assessor (internal stakeholder).
6. After the TPR assessor submits the completed IRQ, the due diligence process begins.
7. The due diligence process creates two risk assessments, each containing an external due diligence questionnaire, one for the third-party and another for engagement.
8. After the supplier contacts complete and submit the external questionnaires from the Supplier Collaboration Portal, the TPR manager goes through the questionnaires and approves the due diligence request. For more information, see [Complete a risk assessment from the Supplier Collaboration Portal](#).
9. A contract record is created with an approval. After the contract record is approved, the risk record is updated with the final rating.
10. After the supplier manager accepts the risk rating, an email is sent to the requester informing that the due diligence request has been successfully processed and approved.
11. The supplier manager closes the due diligence request (case).
12. As a supplier manager, you can use the risk assessment result data in combination with any other data to determine whether to continue or cancel the onboarding process.

# Enhancing the asset procurement experience using IT Asset Management (ITAM) and Sourcing and Procurement Operations (SPO)

Integrating IT Asset Management (ITAM) with Sourcing and Procurement Operations (SPO) enhances the procurement process for service requests.

## Combined benefits of integrating IT Asset Management and Sourcing and Procurement Operations

Integrating ITAM with SPO provides the following benefits:

- Streamlines workflows and improves the experience for asset managers and end users.
- Enables asset managers to initiate and manage external purchases directly from ITAM.
- Improves data integrity and compliance through synchronized records.
- Delivers faster, asset-driven procurement with fewer manual steps.
- Manages receipts, shipments, and assets automatically and consistently across Asset Management (ALM) and SPO.

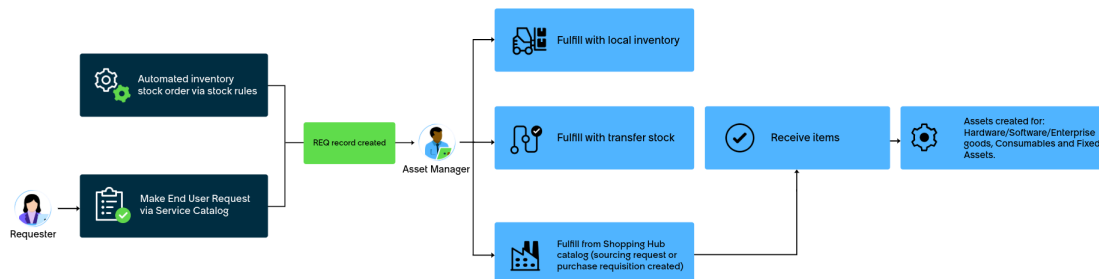
Feature	IT Asset Management	Sourcing and Procurement Operations	All applications together
Raise sourcing requests for catalog items without a price	✗	✓	✓
Generate purchase requests for catalog items with a price	✗	✓	✓
Submit asset requests from Employee Center or Service Catalog	✓	✗	✓
Create requests via stock replenishment rules	✓	✗	✓
Receive assets using mobile barcode scanning	✓	✗	✓
Generate comprehensive records in the Asset [alm_asset], Software License [alm_license], and Consumable [alm_consumable] table	✓	✗	✓

## Workflow for IT Asset Management and Sourcing and Procurement Operations better together feature

Using the IT Asset Management and Sourcing and Procurement Operations applications together provides the following benefits:

- Create and manage external purchase by accessing the items from the Shopping Hub within the IT Asset Management application.
- Manage all related receipts and shipments automatically and consistently across IT Asset Management and Sourcing and Procurement Operations applications.

### The IT Asset Management and Sourcing and Procurement Operations workflow



In this workflow:

1. The procurement journey begins with one of the following events:
  - An employee requests IT assets through the Service Catalog.
  - An automated inventory stock order is generated based on stock rule configurations.
2. The Procurement Manager checks whether the request can be fulfilled with items from local stock, by transferring items, or by placing an order.
3. The Procurement Manager with the following roles can create a Purchase Order by accessing the items with or without a price from the Shopping Hub catalog to fulfill the service request.
  - procurement\_admin or procurement\_user
  - asset manager role (sn\_spend\_asset.spo\_shopper)
4. After the Purchase Order is completed, the requested assets are received and delivered to the stockroom.
5. In the IT Asset Management application, assets are created when you confirm receipt of the requested items. Depending on the type of the asset, one of the following asset records is created:
  - For hardware or enterprise assets, a record is added to the Asset [alm\_asset] table.
  - For software assets, an entitlement is created in the Software License [alm\_license] table.
  - For consumable assets, an entitlement is created in the Consumable [alm\_consumable] table.

### Requirements for integrating IT Asset Management and Sourcing and Procurement Operations

The following plugins are required to use the IT Asset Management Integration for Sourcing and Procurement Operations better together feature:

1. IT Asset Management Integration for Sourcing and Procurement Operations (com.snc.sn\_spend\_asset) plugin
2. Sourcing and Purchasing Automation (com.snc.sn\_pr) plugin
3. Procurement (com.snc.procurement) plugin
4. Shopping Hub (com.snc.uib.sn\_spend\_uib) plugin

The following additional plugins are required based on the specific IT Asset Management products installed:

- Enterprise Asset Management (com.sn\_eam) plugin
- Hardware Asset Management (com.sn\_hamp) plugin
- Software Asset Management (com.snc.samp) plugin

## Get started with procuring assets from the Shopping Hub catalog

Start procuring assets by accessing the items from the Shopping Hub catalog by completing these tasks:

1. [Activate Asset Management Integration for Sourcing and Procurement Operations \(sn\\_spend\\_asset\) plugin](#).
2. Begin sourcing and procuring of the requested items from the IT Asset Management workspaces such as Software Asset Workspace, Hardware Asset Workspace, or Enterprise Asset Workspace. For more information, see [Create Sourcing Request or Purchase Requisition in SPO via IT Asset Management workspace](#).
3. Receive the requested assets in a stockroom. For more information, see [Receiving assets in the IT Asset Management](#) application.
4. Acknowledge the receipt of the assets in the stockroom for asset creation. For more information, see [Asset creation in the IT Asset Management application](#).