Order-to-Pay Center Validation Tool: Org Approver Training

I3P Business Office

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What is Order-to-Pay (OtP)?

- Order to Pay is the establishment of a new platform (Service Now) for ordering services through ESRS
- OtP will capture order data at the time of approval and fulfillment data from the I3P Vendor through a web interface
- This will be used to streamline the ACES invoice reconciliation and validation by comparing invoices to the order/fulfillment data in Service Now.
- This requires NASA users to validate receipt of services as indicated by the I3P vendor

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Order to Pay Schedule

- Order to Pay is being implemented in two phases
  - Center Validation Tool – go live – Nov 24, 2014
    - » Tracks order data from ESRS (Remedy) and fulfillment data from the vendor through a web interface (commonly referred to as the data stores)
    - » Provides the capability to compare the data to the invoices received from the I3P Vendor
    - » Provides the capability to run reports of data exceptions between the invoice and data stores
  - ESRS Migration – go live – Jan, 2015
    - » Provides the Service Now platform for ordering services through ESRS
      - – New look and feel, easier to find services
      - – Provides for tech refresh (like to unlike) and Early tech refresh

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What Changes With Go Live of CVT & ESRS Migration?

Existing Roles

	Changes with CVT - Go Live 11/24/2014	Changes with ESRS Migration - Go Live 1/2015
End User or On Behalf Of Requestor (OBO)	End User - Reply to validation email within 6 calendar days to validate fulfillment of order; OBO - no change; orders placed in Remedy	End User - order and respond to validation email in ServiceNow; OBO - order in Service Now
Org Approver	Orders still approved through Remedy. When end users do not respond to the survey for validation of order fulfillment, Org Approvers will receive escalation notice to validate orders in Service Now.	Approves orders in Service Now
IT Approver	None - Orders still approved through Remedy	Approves orders in Service Now
Resource Analyst	Orders still approved and cost centers assigned through Remedy. Cost Centers reassigned and updates occur in Service Now	Approves orders and assigns cost center in Service Now

New Roles

Center Final Validator	Final escalation of orders with no survey response by the end user or org approver	N/A
Cost Center Maintenance	Center Resource Analyst will now use Service Now to maintain Cost Centers as opposed to completing the cost center change template.	N/A

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Survey Email to End User for Order Validation

The following revision has been made to the email that end users will receive:

Ordered for Self to Customer – Completed Email

Subject: ACTION REQUIRED: Service Delivery Validation for Service Request <REQ#> for <Detailed Description> is now required.

Body: All users are encouraged to validate their services. HOWEVER, USERS RECEIVING ACES SERVICES ARE REQUIRED TO VALIDATE DELIVERY OF A REQUESTED SERVICE WITHIN SIX DAYS.

The following information is in reference to Service Request <REQ#>.

Service Request <REQ#> for <Detailed Description>
<Insert APC details here> has been completed.

Comments/Business Justification:

<$Comments_Business Justification Entry 1$> <date>
<$Comments_Business Justification Entry 2$ (if exists)> <date>
<$Comments_Business Justification Entry 3$ (if exists)> <date>

We are dedicated to providing you with accurate and timely delivery of services. Please take a moment to let us know if we have completed delivery of your Service Request to your satisfaction at <survey link>. You may also view the details of your Service Request at https://esd.nasa.gov by selecting Order Services and clicking Open Requests or by selecting "Search All Requests" and entering your service request number. Please note the survey will time out after 30 minutes of inactivity. Also, this survey will expire after six days.

If your service was NOT delivered in a complete and accurate manner you can respond 'No' to the first question on the survey; we will open a ticket on your behalf to have the matter resolved.

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Survey Email to End User for Order Validation (Order on Behalf Of)

Ordered "On Behalf Of" to Customer – Completed Email

Subject: ACTION REQUIRED: Service Delivery Validation for Service Request *<REQ#>* for *<Detailed Description>* submitted on your behalf by *<Requested by First Name Requested by Last Name>* is now required.

Body: All users are encouraged to validate their services. HOWEVER, USERS RECEIVING ACES SERVICES ARE REQUIRED TO VALIDATE DELIVERY OF A REQUESTED SERVICE WITHIN SIX DAYS.

The following information is in reference to Service Request *<REQ#>* *#>* that was submitted by *<Requested by First Name Requested by Last Name>* on behalf of *<Customer Name>*.

Service Request *<REQ#>* for *<Detailed Description>*
<Insert APC details here> has been completed.

Comments/Business Justification:

<$Comments_Business Justification Entry 1$> <date>
<$Comments_Business Justification Entry 2$ (if exists)> <date>
<$Comments_Business Justification Entry 3$ (if exists)> <date>

We are dedicated to providing you with accurate and timely delivery of services. Please take a moment to let us know if we have completed delivery of your Service Request to your satisfaction at *<survey link>.* You may also view the details of your Service Request at https://esd.nasa.gov by selecting Order Services and clicking Open Requests or by selecting "Search All Requests" and entering your service request number. Please note the survey will time out after 30 minutes of inactivity. Also, this survey will expire after six days.

If your service was NOT delivered in a complete and accurate manner you can respond 'No' to the first question on the survey; we will open a ticket on your behalf to have the matter resolved.

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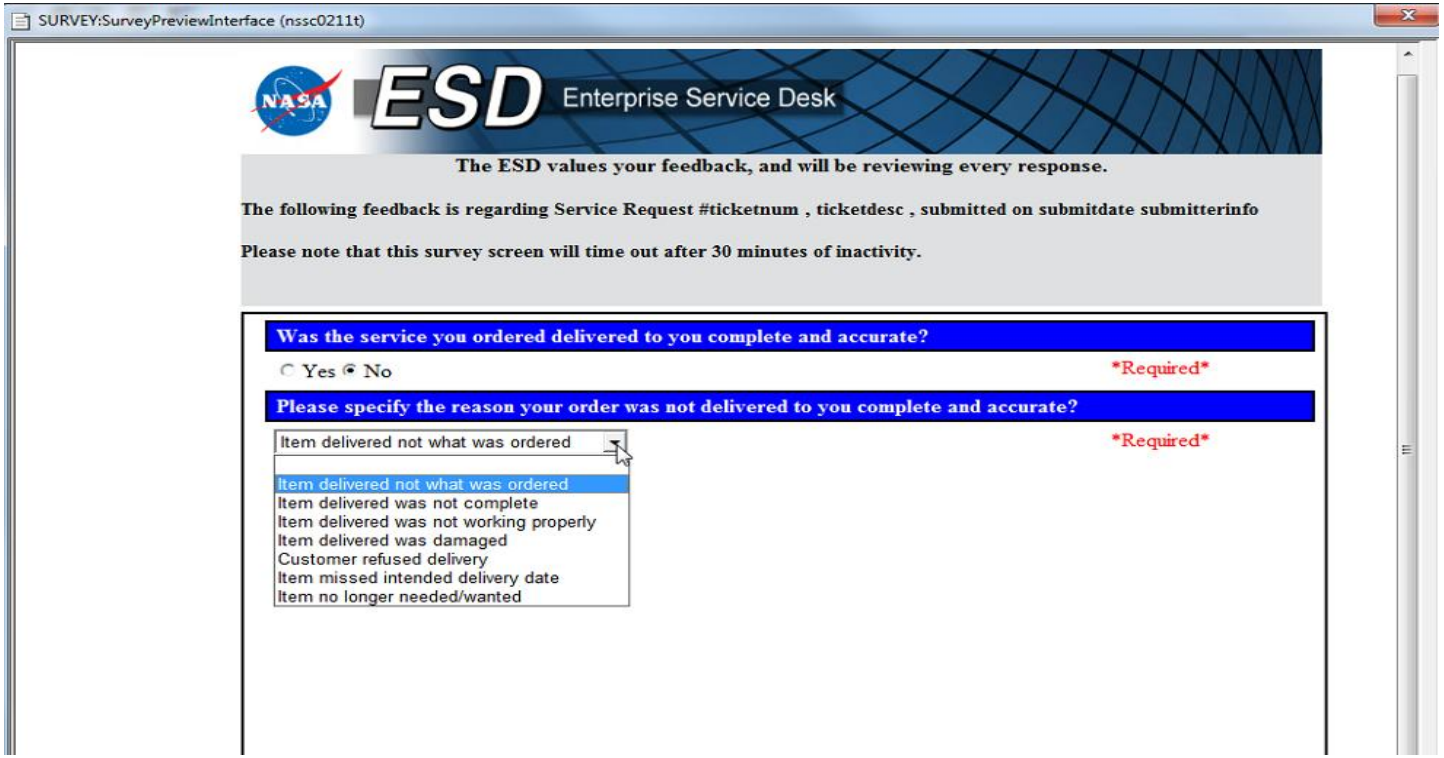
Survey Response by End User



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End User Survey Response Rate

- Currently responses to end user survey request is ~10% – 12 %
- If End User does not respond within 6 calendar days the survey is escalated to the Org Approver queue
- If the Org Approver does not validate within 6 calendar days the survey is escalated to the Center Final Validator (new role)
  - Remains in the queue until validation occurs
- Goal is to increase end user response rate based on changes in verbiage of the survey email

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Escalation Email for Order Validation

From: Enterprise Service Desk
To: NASA Org Approver
Subject: NASA Enterprise Service Desk *<RITM#>* for *<Customer Name>* for *<Detailed Description>* requires your approval.

Request Item *<RITM#>* for *<Detailed Description>* submitted for *<Customer Name>* requires your approval. Customer *<Customer Name>* has been asked to confirm completion of the Request Item but has not responded within the designated time. This action is being escalated to you as Org Approver or Center Final Validator. Validation of the Request Item is required within six calendar days in order to maintain the accuracy of ESD databases and for reconciliation of ACES monthly invoices.

Org Code: *<Org Code>*

Please review and provide approval for / rejection of this request at https://nasa.service-now.com. Select "My Approvals" under “Self-Service” or under “CVT” to see your list of approval actions. You may also use any of the shortcuts provided below.

If you have any questions or need assistance, please visit the NASA Enterprise Service Desk (ESD) online at https://esd.nasa.gov or call 877-677-2123 to speak with an ESD agent. Please reference Request Item *<REQ#>* when calling or include it in your online incident ticket.

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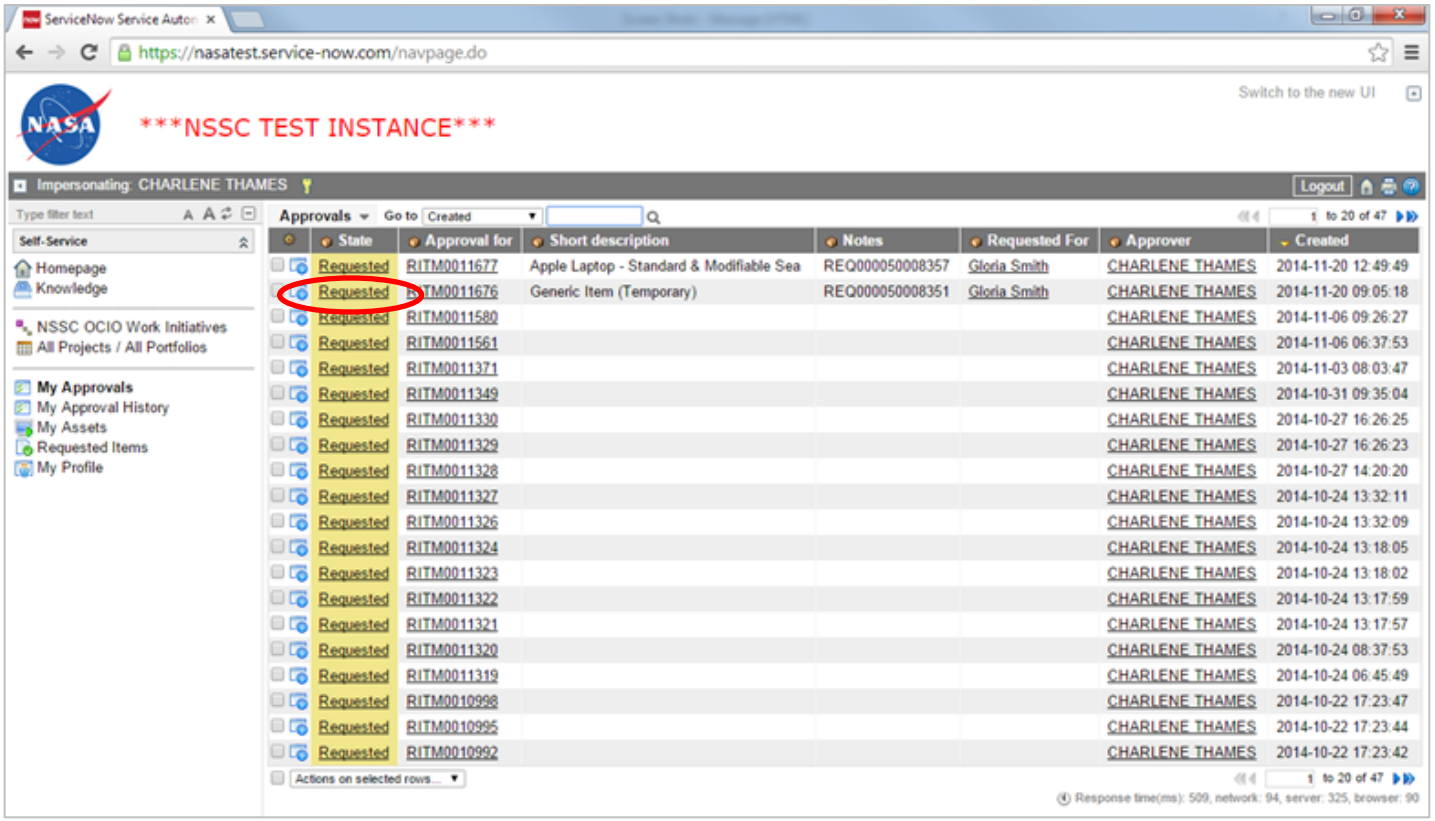
Validating Orders

- Click on “My Approvals” under the “Self Service” section on the left side of the screen



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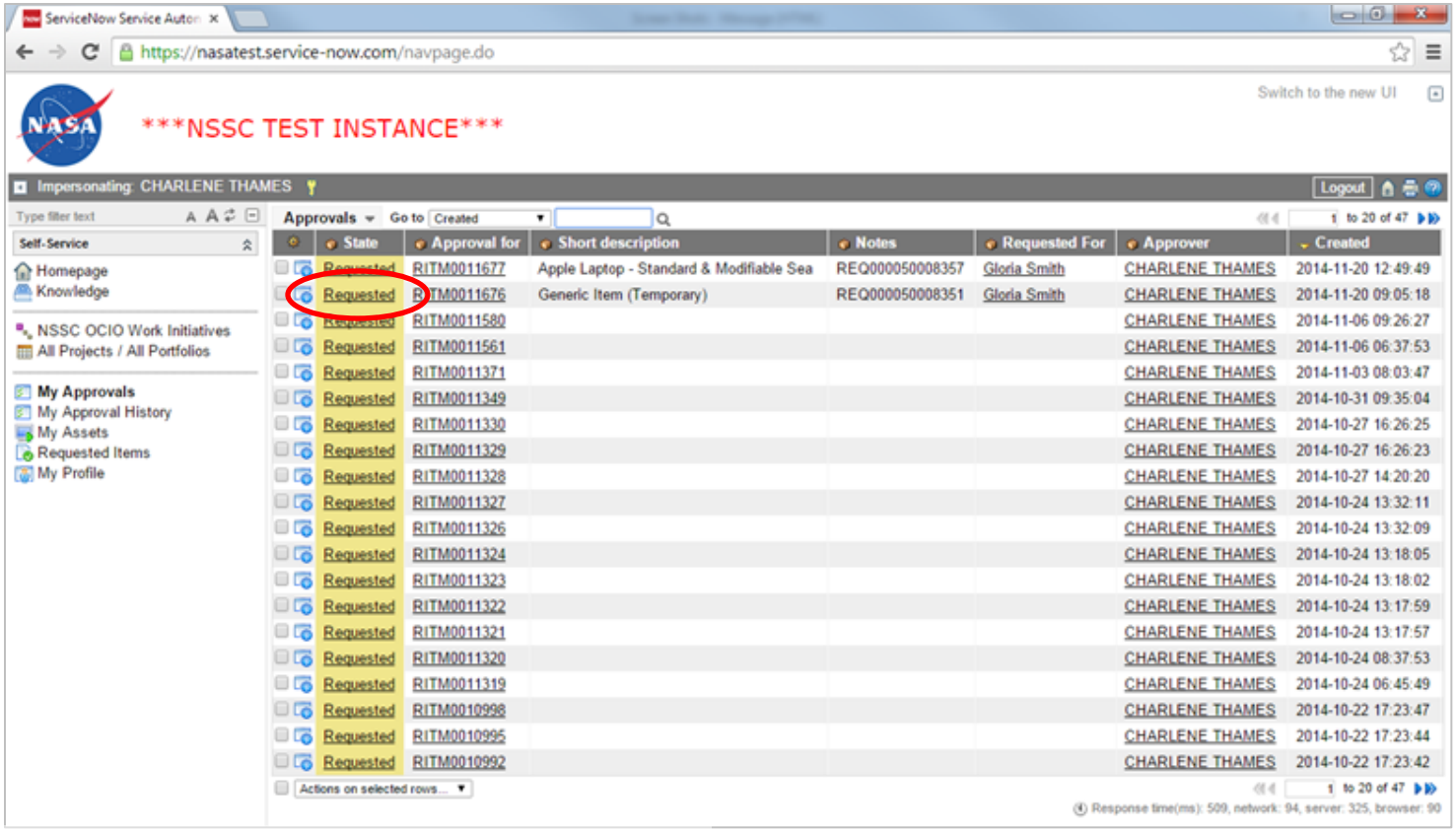
Validating Orders (*continued*)

- Locate the requested item number provided in the email notification
- Selected the “Requested” column for the appropriate request item



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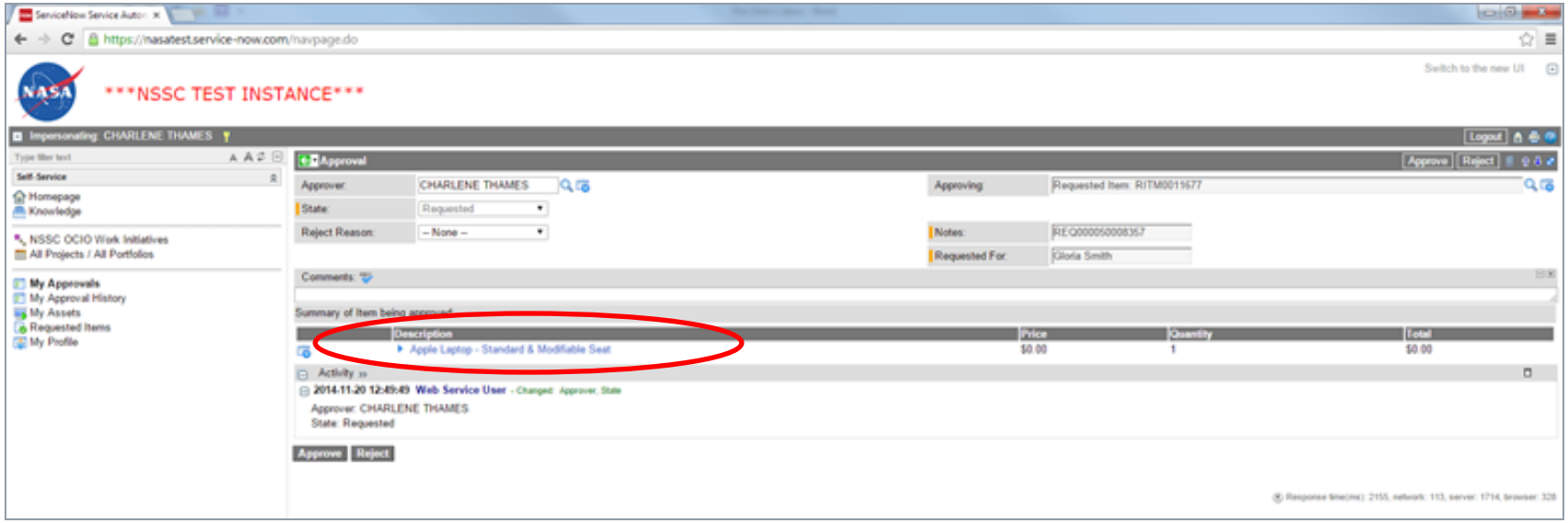
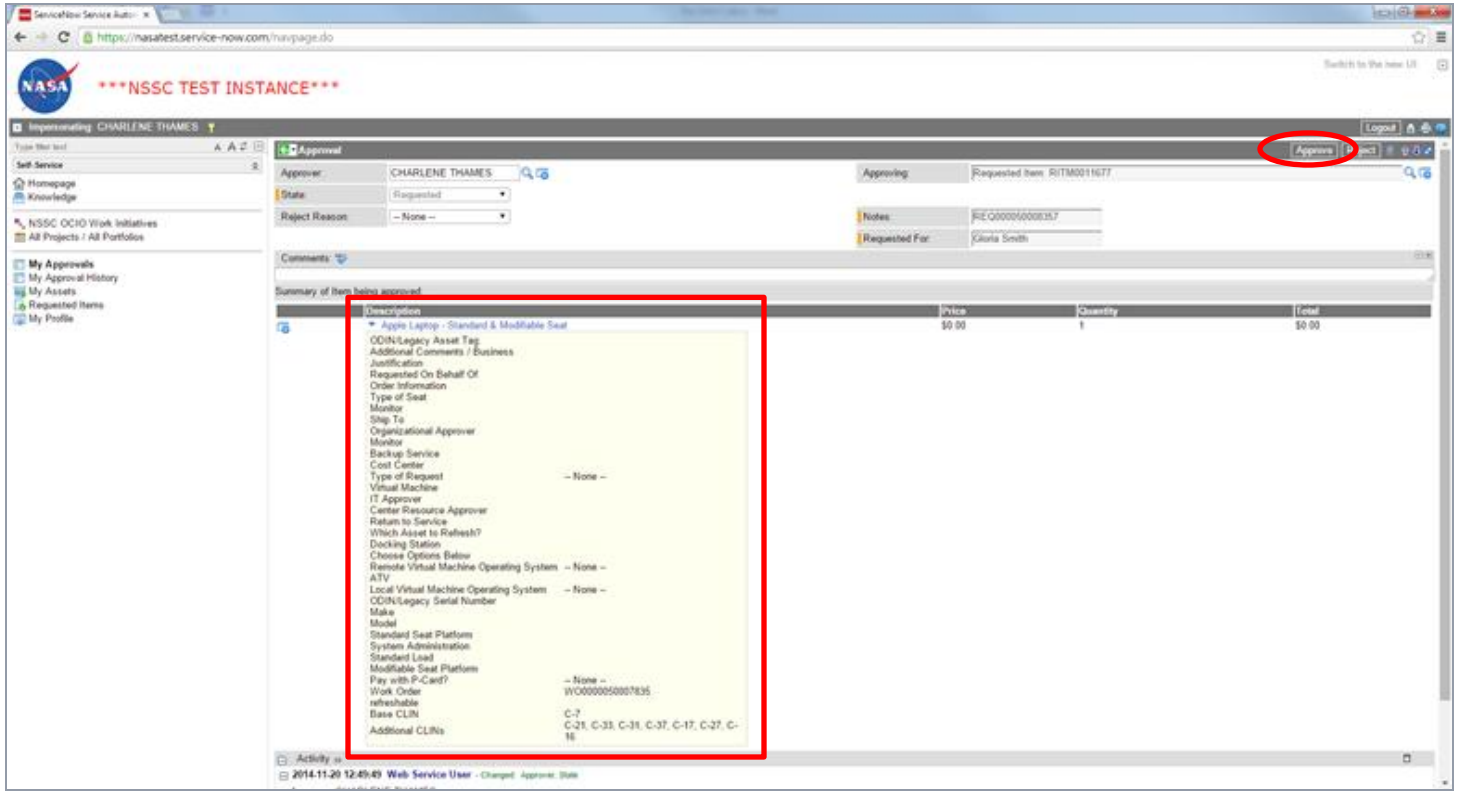
Validating Orders (*continued*)

- Once selected the item description is displayed, select the item “Description” to drill into the details



Validating Orders – Concurring

- Item description will be displayed
- Concur with validation by selecting “Approve” from the dark grey “Approval” bar near the top of the page



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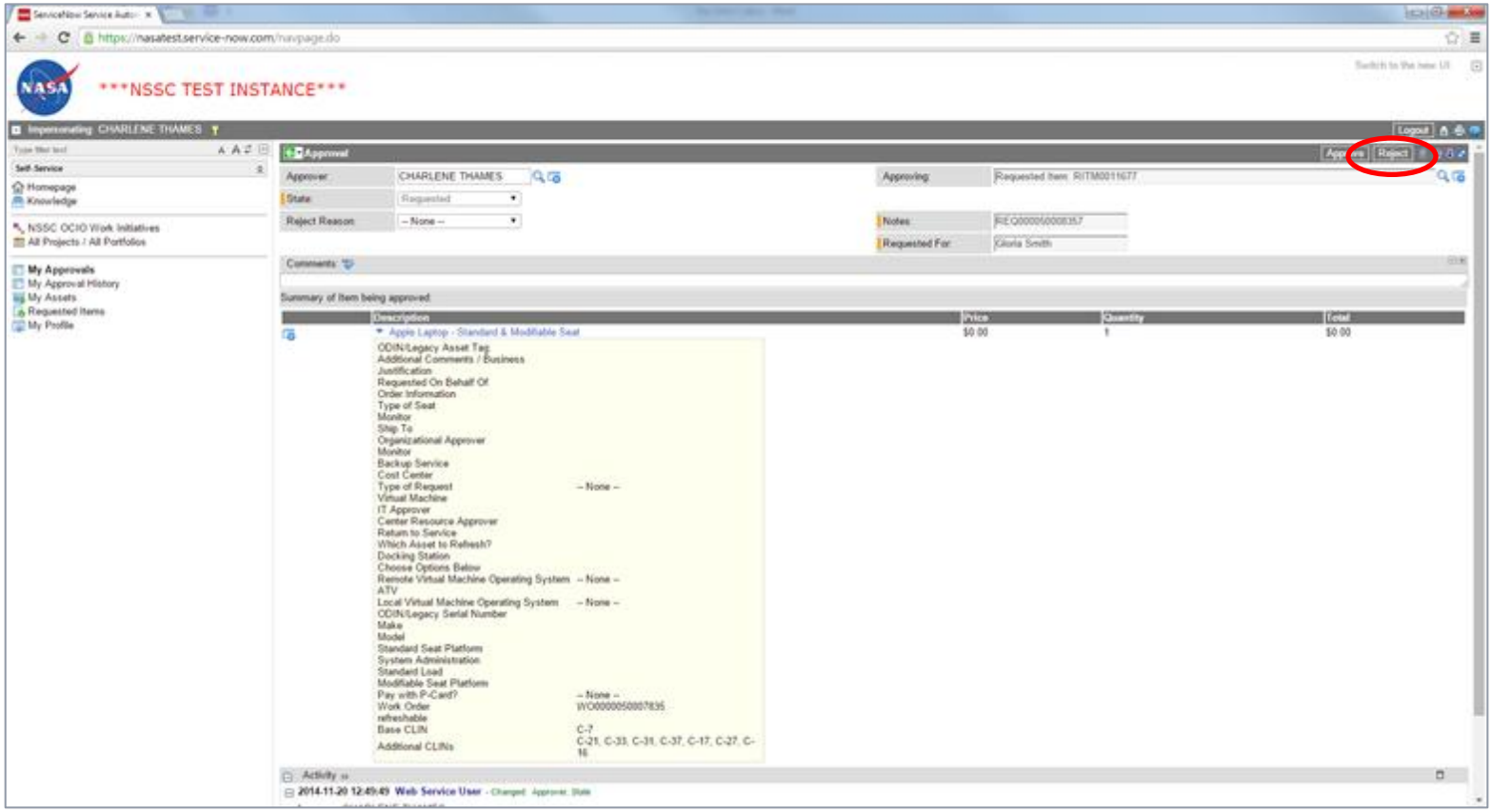
Validating Orders – Not Concurring

- Do not concur with validation by selecting Reject



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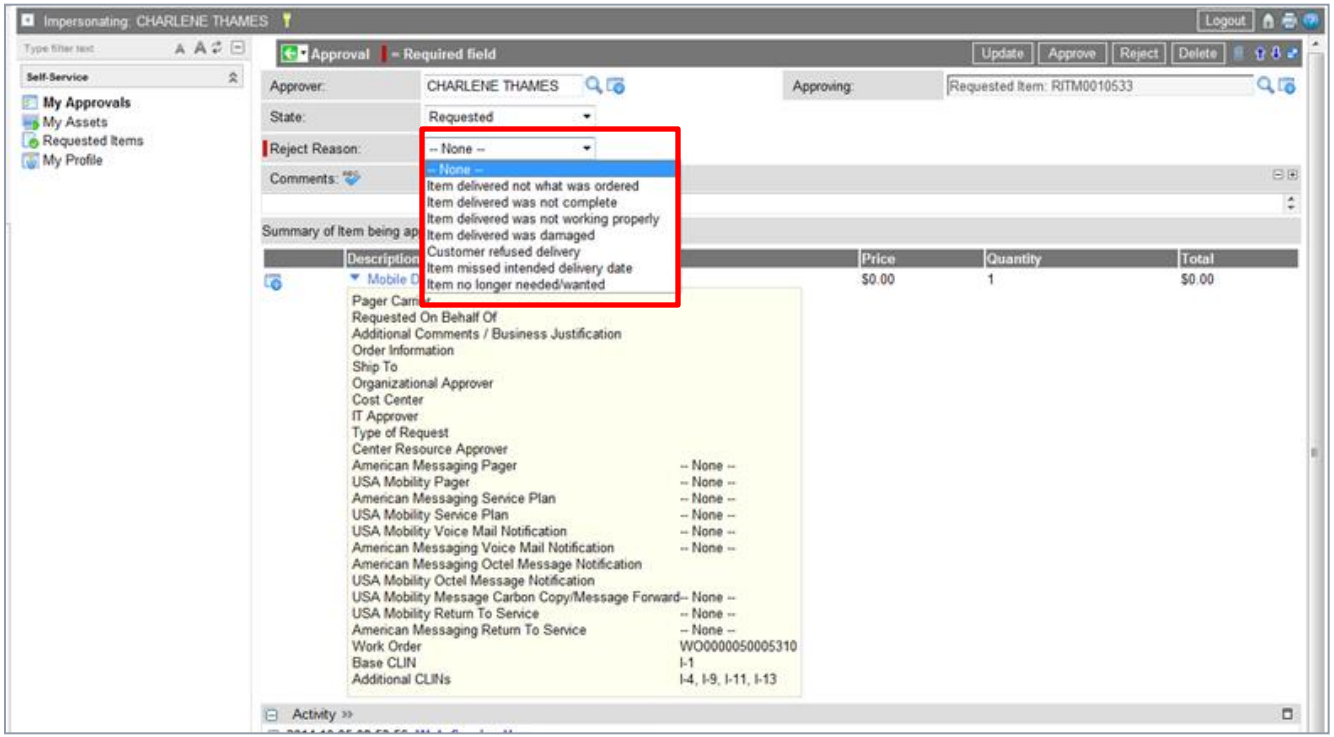
Validating Orders – Not Concurring

- Once you reject the item, you will be required to select a “Reject Reason”
- Select the appropriate code for rejection from the “Reject Reason” drop-down box



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