



Cut Costs & Boost Efficiency with Checklist Pro

Checklist Pro is a versatile no-code/low-code tool designed for developers, catering to both citizen developers and professional coders. It offers cost-effective solutions for addressing challenges on the ServiceNow platform. One of the key advantages for Checklist Pro customers is their access to an expanding library of pre-built solutions, which deliver immediate value for a range of frequently encountered ServiceNow business use cases.

These solutions are packaged as Update Sets, allowing for easy installation, configuration, and customisation to meet the specific needs of each customer.

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TEXT TO CHECKLIST (AI ASSIST)

Introducing the innovative Text-to-Checklist feature!

The Checklist Pro solution includes an "AI Assist" button that seamlessly integrates with AI-in-a-Box, a private AI solution aimed at enhancing productivity while ensuring maximum security and control at a fraction of the cost. Integration with ServiceNow's Now Assist is coming soon!

Simply pose a question on a specific topic, and this integration will generate a customised response that, with a single click, creates a ready-to-use checklist directly in Checklist Pro.

The AI prompt delivers a checklist in Markdown format, which is then transformed into a Checklist Pro checklist at the touch of a button.



Video: <https://youtu.be/EwhWTRBlqug>

GRC ATTESTATION

Governance, Risk, and Compliance (GRC) assists organisations in automating risk management, compliance tracking, and policy enforcement to enhance security and regulatory adherence.

This comprehensive application from ServiceNow can be complex and costly for those tasked with reviewing controls to assert (or "attest") their validity and necessity, especially when these activities occur only a few times a year.

To simplify this process and reduce costs associated with users performing attestation duties, Checklist Pro offers a user-friendly, cost-effective alternative that integrates directly into the out-of-the-box (OOB) GRC Attestation process. Simply leave the OOB attestation field on the GRC Control record blank, and a Checklist Approval with a GRC Attestation checklist will be sent to the designated reviewers.

Since Checklist Approvals are used instead of OOB GRC Attestations, any user in your organisation, even those without ServiceNow roles, can be selected to perform this task. The results of the Checklist Approval are then reflected back into the GRC Control record, allowing the standard GRC Attestation process to continue, but with a more economical and simplified approach.

DELEGATED DEVELOPER JUMP-START PROGRAM

Question: How can you fully leverage ServiceNow to create a continuous stream of straightforward services and workflows that address your organisational needs, all while working within a limited budget and development resources?

Answer: Empower your domain experts to build Service Catalogue items.

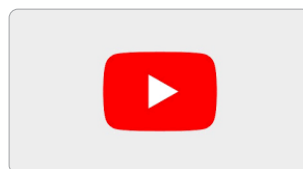
Problem: How do you manage this activity to maintain platform integrity and ensure consistency in your catalogue and workflows?

Solution: This challenge can be effectively addressed with Checklist Pro.

The Checklist Pro Delegated Developer package includes a Catalogue Builder template that allows individuals without ServiceNow skills to create a Service Catalogue item in mere seconds. It also utilises a pre-built simple workflow that offers an optional approval step, followed by an optional work-completion step.

- Your Delegated Developer community needs to know just a few key details:
- The name of the Catalogue Item to be created
- A brief description of the Catalogue Item's purpose
- A set of input data to be collected from service requesters, built in Checklist Pro as a checklist (as easy as creating a Word document)
- A set of processing instructions, also configured in Checklist Pro as a checklist of tasks to complete the request
- Select a group for approval (if necessary)
- Select a group to carry out the work (if necessary)

We have seen customers successfully create engaging services such as Telework Requests and Email Relay Server setups in as little as 10 minutes.

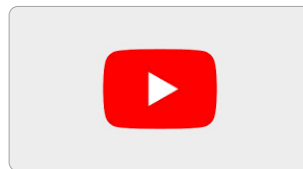


Video: https://youtu.be/_JbQ4gMtNUs

KNOWLEDGE ARTICLE CHECKLIST APPROVAL

Knowledge Base articles serve as essential references for policies, procedures, and troubleshooting. However, to maintain their accuracy, reviews and oversight are often necessary. ServiceNow offers an approval option for articles prior to publication, but this incurs costs for Business Stakeholder licenses.

Checklist Pro provides an alternative to OOB approvals that require users with Business Stakeholder roles (which incur a subscription cost per approver). By using Checklist Approvals, accessible to Requester users (i.e., unlicensed users), in the Knowledge Article review process, organisations can increase the number of KB article reviewers without incurring additional Business Stakeholder subscription costs.



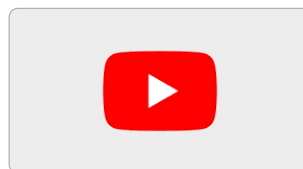
Video: <https://youtu.be/Erd8mhwBe24>

FILLABLE PDF TO CHECKLIST AND BACK TO FILLABLE PDF

Fillable PDFs are ubiquitous, including in ServiceNow, where they are commonly used in HRSD, Knowledge Base, and Document Management applications.

It is often necessary to capture information initially in ServiceNow for various business operations and decision-making workflows, and then store it in PDFs.

Since Checklist Pro checklists are an effective way to capture user input, we offer a “Generate Checklist from PDF” option that scans a fillable PDF attached to a Checklist Pro Configuration file, instantly creating a checklist that reflects the fillable fields from that PDF. Additionally, there is a button to “Save as PDF” to store those checklist items back into the Fillable PDF.



Video: <https://youtu.be/qw9l31VLpqq>

DATA STEWARDSHIP SOLUTIONS

Every ServiceNow instance contains critical core data: users, groups, and departments. Almost every organisation has encountered issues where this data becomes inaccurate:

- Users assigned to incorrect groups
- Users reporting to the wrong managers
- Users placed in the wrong departments

Inaccurate information can lead to several problems:

- Improper work assignments or approval requests
- Unauthorized access to sensitive information
- Subscription cost implications for users with inappropriate premium roles

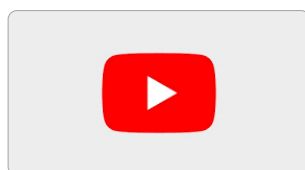
Customers using Checklist Pro can access our “Data Stewardship” solutions to prevent these issues:

- Group Member Management
 - A Checklist Approval is sent to the Group Manager to review the list of employees in the group(s) they oversee.
 - The manager can uncheck members that should be removed (using a person picker) or add individuals who should be included in the group.
 - Once any necessary changes are made, the manager clicks approve, and the group is updated. If Active Directory needs to be updated automatically, an Integration Hub flow can be added.

This same Checklist Pro solution is applicable to the following use cases:

- Manager / Employee Relationship Management
- Department Member Management
- Business Unit Management

The added advantage of this solution is that Checklist Approvals are leveraged (as opposed to OOB Approvals or Tasks, both of which require paid subscribers). Checklist Approvals are available to free requester users, ensuring that governance and oversight do not incur subscription cost penalties.



Video: <https://youtu.be/FyRbismEwUE>

HARDWARE INVENTORY ASSESSMENT

Most organisations conduct annual hardware inventory assessments. Even with a CMDB in place, performing physical inventory checks is beneficial for various reasons, including verifying asset ownership and identifying items that may be recorded in the CMDB but not captured through discovery.

Although organisations may have existing physical hardware inventory processes, we have developed a complementary solution in Checklist Pro that creates a Checklist Assignment record for every unique “Assigned To” user from the Hardware (alm_hardware) table, displaying all the hardware CIs assigned to them as a checklist.

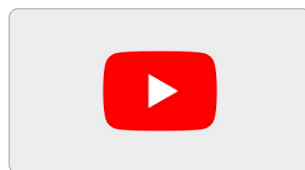
Since Checklist Assignments can be assigned and completed by any user, even those without roles, they can easily review the checklist of hardware items assigned to them. They can check off items still in their possession and uncheck those no longer held. If they need to add items not listed, they can simply use the Hardware Item picker at the bottom of the checklist and click the “Add” button to include them.

Once completed, they simply click the “Complete” button, and they’re done.

We have created a Hardware Assessment dashboard to highlight key findings such as:

- Number of active users with Hardware
- Number of unassigned Hardware items
- Number of inactive users with assigned Hardware items
- Number of in-progress assessments
- Number of completed assessments
- Number of cancelled assessments
- Number of completed assessments needing review – these cases involve users adding or removing items in their checklist (helping the inventory team know who may need prioritisation for confirmation)
- Number of in-progress assessments with updates – even if users haven’t completed their assessment, they may have already made changes, indicating that additional visits by the inventory team may be necessary

Utilising Checklist Pro for solutions like this can significantly enhance your organisation’s Hardware Inventory activities by employing self-assessment to target the inventory team’s efforts.



Video: <https://youtu.be/owZFMXgVsjs>

CMDB SERVER ASSESSMENT

In your Configuration Management Database (CMDB), certain elements may not be easily discoverable, such as the individual responsible for managing each server.

However, identifying the person in charge of each server is crucial, and having a system to oversee and govern these responsibilities is essential.

This is the rationale behind our CMDB Server Assessment solution. With this tool, a scheduled job reviews the server Configuration Items (CIs) and generates a Checklist Assignment record for each unique individual responsible for managing a server. Each server managed by that person is included as a checklist item in their respective Checklist Assignment record.

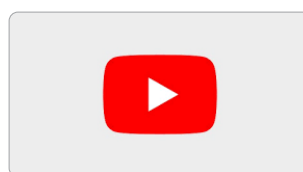
Since Checklist Assignments can be assigned and completed by any user, even those without specific roles, they can effortlessly review the checklist of hardware items assigned to them. Servers still under their management should remain checked, while those they no longer oversee should be unchecked. If they need to include servers not listed, they can simply use the server picker at the bottom of the checklist and click the “Add” button to include it in their list of managed servers.

Once they have completed their review, they can click the “Complete” button to finalise their assessment.

We have also developed a CMDB Server dashboard to showcase various key findings, including:

- Total number of servers being managed
- Number of in-progress server assessments
- Number of completed server assessments
- Number of cancelled (incomplete) server assessments
- Number of server assessments needing review—these cases involve servers added or removed by the manager during their assessment, facilitating an organisational double-check for accuracy
- Number of in-progress server assessments with updates—indicating that while the server manager has not completed their assessment, they have made some changes, signalling that further reviews may be necessary

Utilising Checklist Pro for solutions like this can significantly enhance your organisation’s CMDB server activities by providing a governance and oversight solution to ensure accuracy within your CMDB.



Video: <https://youtu.be/BdvTY7k009w>

READY-TO-USE CHECKLISTS

We offer a growing collection of provided checklists that can be applied to any record (Out-of-the-Box Approval, Change Task, Incident, Problem, Catalogue Task, etc.). These checklists can be used as-is, modified to meet your specific needs, or serve as inspiration for creating your own.

- Environment, Health & Safety (EHS)
 - Emergency Preparedness Inspections
 - Hazard Material Handling Inspections
 - General Safety Inspections
 - Machine Safety Inspections
 - Fire Safety Inspections
 - Personal Protective Equipment (PPE)
 - Environmental Compliance
 - Chemical Safety Inspections
- North American Electrical Reliability Corporation Critical Infrastructure Protection (NERC-CIP)
- Project Management (SPM)
 - Video: <https://youtu.be/J4ACZ8IETXU>
- ServiceNow Instance Upgrade
 - Video 1: <https://youtu.be/RNRr4yKQDHs>
 - Video 2: <https://youtu.be/SHWcwAE5Qbc>