

101+ Ways To Automate Your Work Place

Automate Service Requests Throughout Your Organization

IT professionals have a huge opportunity to become an important strategic business partner.

In this new era of cloud-based software solutions, you can now fully leverage your expertise to reinvent your role. You can reach out to every corner of your organization and drive process improvements for service requests and delivery. Help your peers automate the way they work, and be the champion of improving services throughout your organization.





IT Does Service Better Than Anyone

To the employees of the organization, it's the place they go to make requests and generally just get things done. But now, the Service Catalog doesn't belong to just IT anymore. It's about service across the enterprise and elevating the service desk in your organization.

A Catalog To Make Work Life Better

Think about an IT Service Catalog as a supermarket of available services. Everyone in your company requests and delivers services from each other. From Human Resources and Marketing to Facilities and Procurement, each department is a service provider to the organization, as well as a consumer of services. It's time to take the exclusivity out of the IT Service Catalog and allow it to spread its wings and fly across the enterprise.

This Guidebook Is All About How To Elevate The Service Experience Throughout Your Organization

For IT, this book is a conversation starter on how your Service Catalog expertise can be applied to all departments throughout the organization. We hope this guide serves as inspiration, and a blueprint, for what you can do to improve and simplify the service experience for everyone throughout your organization.



Information Technology [|T]

The true pulse of the organization's service delivery, technology, and, of course, beloved password resets.

With an ever-growing list of little requests that have to be done "immediately," the Service Catalog gives IT the ability to gather the information they need to provide a more effective and efficient resolution.

01. New Hardware Any kind of hardware request. You can have multiple Service Catalog items for each hardware type.

O2. Mobile Phones Control types, brand, and even color of phones you provided. Capture carrier plan and data plan requirements.

03. New Software License Who needs to approve a new license request and do you have an available license on hand?

04. Loaner Device Check availability and request a loaner device

05. Cloud Application Access Which application do you need access to and who needs to approve it?

"I built dropdown menus for any type of equipment students could check out, which allowed our team to simply fill a text-field with the barcode on our equipment." - Ringling College of Art and Design **06. Reset A Password** Select the application required for a password reset.

07. User Access Control user access requests to different systems. Have multiple requests for each business system.

08. New Employee/User System Set-Up Bring all of the steps of the onboarding process into one location for the hiring manager and service providers involved.

09. Weekly Backup Check Weekly recurring service requests reminding you to check backups. Include a list of all your servers/backup jobs to stay on top of your backup regime.

10. Monthly Maintenance Tighten the bolts across your technology stack from running the defragmentation tool to reviewing your operating procedures and making the necessary updates.

11. Quarterly Technology Checkup

A list of everything requiring a periodic check. These are automated reminders of the activities you and your team need to remember.

12. Reimage Computer Whether an employee has left the company, or the computer requires an overhaul, remove all software and reinstall.

13. Format Hard Disk There are many reasons why a hard drive might require reformatting; gain an understanding of why it is needed to better move forward with the process.





Searche Strain Facilities & Maintenance

Manage all of the "other" assets in a single place, while keeping the lights on. Literally.

Maintenance items accumulate quickly and can easily be forgotten. Create a new level of accountability with consistent and recurring service requests that notify team members and keep the schedule up to date. This kind of automation essentially allows employees to do the maintenance for you -- they may see what you might have overlooked and can simply create a service request to fix it. Here's a quick sampling:

14. Contract Review/Approval Before you sign on the dotted line, have the experts give it a quick glance over to ensure you're not signing away your life, or the company.

15. New Chair New employee? Specific seating requirements? Multiple chair options? Make a selection and await delivery.

16. Chair Disposal Is it time to move to standing desks? As employees make their decision, allow them to easily request for their chair to disappear.

17. New Desk From standing desks to executive desks to cubicles, there's a perfect fit for every department in the organization.

18. New Standing Desk Let's get physical! Say so long to desk chairs and hello to an active organization.

19. Desk Move Moving departments or just eyeing that spectacular window seat? Either way it's an upgrade, so request some help with that move.

20. Lost Key It's easy to forget that the doors to the office lock every day until you need to get in before or after hours.

21. New Key New employee? Lost key never found? Get the building access needed with the right security approvals completed.

22. Re-Program/Re-Key Door Locked out, locked in or no lock at all, it could be a technical issue.

"With six buildings to manage the Facilities team is able to organize their requests in Samanage for issues like lighting or they can schedule reminders for preventative maintenance and recurring stock needs." - Unyts



23. Recurring Fire Extinguisher

Check Make sure you never forget to check that fire extinguisher! Keep it up to date for when you need it most.

24. Monthly Air Filter Inspection Schedule No one wants to be breathing in dirty air. Help remind the right people to change the filters.

25. Monthly HVAC Maintenance

Schedule Let's face it, there's no perfect office temperature. Stay ahead of issues with HVAC reminders.

26. Unscheduled HVAC Maintenance

Broken A/C? Get the right people involved faster and easier.

27. Monthly Water Filter Inspection

Scheduling Nobody likes things floating in their glass of water. Consistently refresh that filter.

28. Office Move Easily coordinate who's moving what and where.

29. Equipment Move Under 60 Lbs. Just need someone to move around a

few desktops or office chairs? Request some assistance.

30. Equipment Over 60 Lbs. It's officially time to bring out the big guns...

31. Urgent Spill Cleanup We're going to need someone to clean up aisle three...stat.



32. General Cleaning That office party left crumbs everywhere. Request a quick vacuum.

33. Bathroom Attention Needed

Yuck. The toilets need some TLC, the floors are unruly and there's a desperate need for air freshener. Automate who needs to get involved!

34. Kitchen Attention Needed

Whose turn is it to do the dishes? Set a schedule to alert by month or rotate by department.

35. Unplanned Carpet Cleaning

A swift elbow took out an entire glass of soda. Get the experts involved before the stain even has time to set.

36. Exterior Snow/Ice Removal Falls in the winter can be a big liability. Ensure those sidewalks are salted. (Or plan a trip to the Caribbean. Whichever comes first.)





Human Resources

From an employee's first smile to their final farewell - and all of the milestones and vacations in between.

More often than not, Human Resources is the team where a gazillion things fall on their plates. Without a simplified process in place, it's virtually impossible to have a solid understanding of what's urgent and what's not. Easily rein in the chaos with a simple, organized approach for employee interaction and collecting requests.

37. New Employee Onboarding With so many steps to bringing an employee onboard, a step by step process for multiple departments with the required approvals built in will ease the new employee transition on the company and the new addition.

38. New Contractor Onboarding

Not every employee is internal. Create a process across multiple departments to ensure training, projects, payments and invoices are handled appropriately.

39. New Hire Background Check Approvals and signatures are required on this critical piece of documentation when a new employee comes onboard.

40. Employee Promotion An exciting day for every employee! Streamline the processes and paperwork that come with a new role and/or a pay raise.

41. Title Change Moving departments? Promotion? Or just a simple title change? Make sure everyone involved is on the same page.

42. Employee Salary Adjustment

The payroll team, manager and employee are seamlessly incorporated into one update.

43. Employee Performance Review Schedule Whether it's quarterly, bi-yearly or yearly, what are the steps managers should take before, after and during the review process?

44. Termination: Involuntary

Employee termination can be a difficult and sometimes a quick experience, streamline what steps need to be taken and who needs to be notified. **45. Termination: Voluntary** It's always unfortunate when an employee leaves the company for a new opportunity, take the steps to get everything in order before they go.

46. Termination: Non-employee Vendors and contractors come and go. When you say goodbye, ensure that all the bases are covered.

47. Vacation Encourage your team that it's time for a little sand and sunshine break by making the request process ridiculously simple.

48. Jury Duty Time Off Government obligations sometimes interfere with the work day. Ensure that PTO days are for the fun stuff, not the government stuff. Oh, and don't forget to bring a good book.





49. Notification of Maternity/ Paternity Leave It's a life changing moment with so many details to cover, work shouldn't be what you're worried about. Make the process easy.

50. Name Change After Life Event You spent enough time at the social security office changing your name. Submit the proper paperwork and let work know your new name in minutes.

51. Training Request: On-Site New batch of employees? Need trainers to come to you? Help coordinate who's coming based on the training needs.

52. Training Request: Off-Site Quickly coordinate which employees will be taking a field trip off-site for training.

"When we hire a new employee, a user will now be created and fire a service catalog item to set up everything for the newcomer for both IT and HR departments." - Santex 53. Department Transfer Changing departments can be bittersweet; get them up and running in their new role faster to improve productivity during the switch.

54. Manager Change This isn't just an average department move, when managers come and go there is a team to worry about. Keep the team and important personnel on the same page.

55. PTO Request Mixing of sick time and fun time can be complicated and hard to track, but with the right approvals in line, it's a breeze.

56. FMLA/Medical Leave Getting sick or injured is never fun, but use the service catalog to alert the right people so they can cover your tasks while you focus on recovery. **57. Voting Time Off** Diplomatic duties call and always during business hours. Just so you aren't missed, submit time off to cast your ballot.

58. Benefits Termination Not every employee requires all of the benefits an organization provides.

59. Beneficiary Name Change From kids to parents to spouses, this is one of the most important selections an employee can make.

60. Add/Remove Name from Insurance Did someone just get married or have a baby? You can never be too careful. Let's get them added to the insurance plan!







It's more than the safety and well-being of the office. Daily access is dictated by cards, approvals, and proper request submissions.

These are the little things that no one remembers when they are onboarding new employees. These are some of the most important items because they have to do with security of the business. Automate these request and prevent them from falling through the cracks.

61. New Security Access ID Card Request Misplace your key card? Get a new one so you aren't standing out in the rain!

62. Replacement Security Access ID Card Broken/Lost New employee? Did you run that fancy ID card through the washing machine again?

63. Visitor Access Pass Whether it's a customer or your spouse, safety requires a proper visitor permit. Help them breeze through the front desk with a quick request.

64. Parking Permit There's nothing worse than walking out to the parking lot and not seeing your car because it's been towed. Get the proper permits and avoid walking home.

65. Security Access Audit Report Equipment went missing last Tuesday night? Have a task sent so someone can run a report to see who came and went.





"The ultimate reviewers in any organization, with the need for streamlined review and approval processes."

Lawyers have the tendency to be somewhat intimidating, but definitely busy, making employees hesitant to make requests or provide the information needed for a request to be successful. Lawyers aren't in the business of searching for a software to streamline their process. Help them help you stay organized with Service Catalog requests.

66. Contract Review/Approval

Before you sign on the dotted line, have the experts give it a quick glance over to ensure you're not signing away your life, or the company.

67. Document Review Request From marketing stories to sales pitches, the legal eyes and ears of the organization will never let you (or the company) look like a fool.



Travel Services

Planes, trains, automobiles, and hotels. Simplify travel bookings.

Everyone has their favorite airline, hotel, and mode of transportation. With a Service Catalog for travel requests, you can increase productivity and give employees the ability to provide personal preferences and requirements upfront. It's a win-win, leading to a simplified and faster travel booking experience that also stays in compliance with the bottom line. Items can also add a layer(s) of approval to ensure employee travel is authorized at desired levels.

68. Airfare: Domestic Let the people ordering your plane tickets know where, when, for how long and whether you want a window or aisle seat!

69. Hotel: International Might want to request first class for this one.

70. Hotel Are you a hotel or bed and breakfast kind of person? Do you feel more at home with a king or two queens? You decide!

71.Rental Car Full size? Mid size? Convertible? Moving truck? Make sure you aren't stuck with a compact when you need a big rig.

72. Train Ticket Sometimes a train is the most efficient way for you to travel and get work done, plan your trip and request your destination.

73. Passport Renewal Who knew passports don't last forever? Ensure you have the right documents in place to leave the country on time.

74. Training Request: On-Site New batch of employees? Need trainers to come to you? Help coordinate who's coming based on the training needs.

75. VISA Global companies have team members constantly traveling, sometimes for weeks or months. Get the right paperwork done so that the country you're visiting is ready for you.

76. Visa Renewal/Extension

Deadlines expand and tasks grow, requiring you to stick around a while longer. Submit the new length of your stay and get the government approvals in line and fast.

77. New Passport Leaving the country for the first time? Passports can take weeks. Simply make your request to ensure you get yours on time.

"If we want to share those tickets with other departments or team members, we can easily include a group of people or reassign, so users are getting feedback in real-time." - SmartPak Equine







The creative juices never stop fowing. Neither does the list of requests.

Sales needs new collateral. Those nurturing emails need new content. The trade exhibit needs to arrive by next Tuesday. There are plenty of opportunities to be side tracked with random projects in marketing. The rest of the organization might not truly understand what marketing does, so each individual project comes with its own level of urgency and impact. With a Service Catalog in place, marketing will have visibility into its ever-growing list of project requests. There's a way to simplify each request and provide a consistent way for marketing to respond.

78. Trade Show Exhibit Shipping

Trade shows have a lot of moving pieces from creative to the bolts of the booth. Make sure they are accounted for and heading to the right convention center.

79. Order Promotional Items It's hard to believe, but a corporate logo can't just be slapped on just anything.

80. New Web Content There's a glaring update required on the website. Ensure the critical changes get to the correct person.

81. Website Edit or Typo Everyone seems to find a typo on the website, no matter how thorough the edits were. There's one perfect place to submit their findings.

82. Website Link Broken While that super creative 404 page is fun to see every once in awhile, you need to know what links are driving to it.

83. Collateral Request Sales needs flyers, lead generation needs emails and HR needs creative for an internal campaign. Prioritize and submit the requirements up front.

84. Technical Writer Review Every industry has its own jargon, ensure that everyone is using it correctly.

85. Email List Creation Sometimes a mass email to hundreds or even thousands of users is required.

86. Email Send Request An Outlook or Gmail email just won't cut it when you need something creative and engaging.

"There's a way to simplify each request and provide a consistent way for Marketing to respond."



87. Marketing Writer Review Not everyone is born to write, request a second set of eyes before you hit send.

88. Customer Welcome Kit Request Each and every customer is special and deserves a little special something.

89. Customer Swag Surprise and delight your customers with a t-shirt or coffee mug, but make sure marketing knows the specifics...like the shipping address.

90. Presentation Design Big sales presentation coming up? New hire orientation? Everything should have a cohesive look of awesome and that's where marketing comes in.

91. Logo Design There's nothing worse than a distorted logo appearing on a partner or customer website or document.

92. Social Media Mention A big promotion or campaign push should get some social media love to reach even more customers and prospects.

93. Customer Quote Need more information from a customer or a proposal to take up the ladder? Get approvals from one manager or multiple managers at the same time.

94. Web Domain Renewal Don't let that domain renewal fall through the cracks. Get the approval you need and tasks sent out to make sure you don't lose it. get involved!







With corporate growth and office changes comes great responsibility, large furniture, and tiny pieces of data.

Many companies aren't fortunate enough to have a storage department, but that doesn't mean there isn't a need for storage. Businesses of all sizes are constantly growing and shifting that results in a never ending flow of requests. With a Service Catalog in place, they can gain a better understanding of where assets need to be, both on and off-site.

95. On-site Storage When you're not quite ready to let it go completely, keep it close by just in case you need it.

96. Off-site Storage Just in the off chance that you have to go through an audit, keep those files, data and large full drawers available away from the office.

97. Retrieval from Off-site Storage Something came up and it's time to dig into the past. Request the specific files you need and have them delivered to you.

98. Storage Boxes It's time to get packing. Instead of scavenging for boxes, simply submit a request for them to come to you.



General Office Administration

So long neon green Post-It Note reminders! The eyes and ears of the organization can automate your order requests.

Take the emails out of the daily equation by automating the office requests, and never let that printer ink run dry.

99. Order Office Supplies It always seems to be raining pens and notepads, until they're gone. Submit a request for the items you need to survive the work day.

100. Order New Business Cards New employee? New job title? New name? All are perfect reasons to request new business cards to share with your friends.

101. Order New Employee Stationery Sometimes all it takes is a perfect handwritten note to close a deal. Make sure you have the proper materials to make an impact.

102. Grocery Order You're lucky to have an office that provides snacks and sodas. Make grocery shopping for an entire organization easy with one detailed list. **103. Lunch Request** Some of the most important meetings happen over a delicious lunch. Provide a detailed order from the restaurant of your choice.

104. Office Decoration 'Tis the season for a little sugar and spice around the office. Do you need a festive set of lights or balloons that fill a room? Submit your special request here.

105. Gift Request We love our teammates through good times and bad. Make sure that they know we're there for them with a little gift request in their honor.

106. Maintenance Request Not every company has an in-house maintenance staff. Instead of bombarding the office admin with requests, submit them in one place that can easily be shared with the repair team.

"Solutions can be routed to users in seconds rather than minutes or hours. This overall approach saves the help desk time, the employees time, and the company money." - Gourmet Trading Company







"No matter how many personnel changes are submitted, no one seems to have the time (or the humor) for payroll errors."

Accuracy is critical to the day-to-day operations within the payroll department. If there is an error, time is of the essence as it affects an employee's income. Track and flag urgent requests, while also giving you peace of mind that you haven't missed a change or update.

107. Pension Details Need details about your retirement plan? Get the right people involved to send them over then get back on the golf course.

108. 401(k) Contribution Change Saving for retirement is a special benefit at your company, but as life changes so may your contributions. Easily submit a request to up it or decrease it.

109. Payroll Deposit Account Change Change of bank? Get someone to help make sure your hard earned money goes to the right place.



110. Incorrect Commission Review

Sales and commissions go hand in hand, but if there is a discrepancy it has to be resolved quickly.

111. Salary Update The most critical part to new positions and promotions is the awesome new salary that comes with it. Put a process in place for updating employee compensation.

112. Payroll Report Headcount and payroll are the most important aspects to any budget. As managers prepare for the next year, or even quarter, give them one easy place to get their numbers.

113. Payroll System Access In this day and age, if you can't manage your funds online, you have no idea what you have. Get access, fast.

114. Payroll System Password Reset

It's the one place you should have the best, most complicated password. So, why can't you remember it? Request your reset, stat!

115. Adjust Employee Time Clock

Everyone forgets to clock in or out every once in a while. Make sure you're getting paid for your hard work!



Accounting

Numbers are hard. Vague service requests involving numbers make them even harder.

With that ever-growing list of unread emails of requests from sales, management, and external customers or vendors, it's easy to get overwhelmed. Take a deep breath. There is a tool available to help take the burden off of your inbox and organize requests based on priority, timeliness, and other criteria you need to move processes forward.

116. Customer Billing Assistance Get help from billing, accounts receivable and the purchasing team to ensure payment is processed on time.

117. Transfer Payment Overpaid on that last invoice? Instead of a reimbursement, ask for the funds to move to the next bill.

118. Locate Funds on Account Don't have access to see where the funds are? Create a process to have the right party run those reports.

119. Invoice Tracking & Send Who has that invoice? What's the status? Wait, did we ever send it?

120. W-9 Request It's tax time again already?! Automate the process to keep the IRS in the loop.

121. Credit Card Payment Get approval to use that company plastic.

122. Banking Information You want to be paid, right? Provide the right banking information to make sure you receive and pay the right place.

123. Proof of Insurance You'd think saying "Yes, I have insurance" would be sufficient. Most of the time more proof is needed. Get the documentation you need from the right department!

124. Vendor Information Expense Report Reimbursement Have the manager in charge of the account reach out to the vendor to get you the information you need. Use approvals and tasks to get reimbursed for gas or the meals from that recent work trip.

125. Purchase Approval Tracking

Did that recent purchase get the green light? Send out tasks to the right folks to find out.

126. Purchase Orders Whether it's new software or new chairs for the office, get your POs faster and increase productivity.





127. Invoice Request Send tasks to your account managers and ensure vendors provide the invoices you need when you need them.

128. Vendor Payment Your awesome vendors work hard, they submit an invoice, now they need to be paid.

129. Receipt Request Make sure you are keeping track of what your employees are spending and get approvals to expense them.

130. Payment Authorization If you have to ask "Am I allowed to buy this?", you better get approval.

131. Travel Payment Approval Work trips can be quite beneficial, but someone has to say yes to them!

"I think the biggest change since we've implemented Samanage is that we can now budget appropriately, and better prepare for purchases for the next quarter, or year." - Bluedrop Performance Learning



Procurement

Requisitions and purchase orders nd their home - and their approval - here.

Procurement processes are intended to promote fair and open competition for the business. Automation through a Service Catalog puts purchase orders, requests, and approvals in the same place, streamlining the communication and processes that need to go together.

132. Consulting Services We're out of ideas. Time to bring in an expert?

133. New Vendor Setup Make sure you get everyone the right information about your new vendor.

134. New RFI/RFP Request Looking for a new product and have lots of options? Set up a process to get information from all of the vendors.

135. NDA Review/Approval Don't sign just anything. Get the appropriate people to review your NDAs.



Catering & Event Management

Managing an event is all about the details. Simplify life with a series of predetermined service requests that cover the scope of any corporate event.

One of the biggest challenges for planning any kind of event is that things change. And that change is constant. Time to make it easier for that meeting planner to respond to your last minute requests. Help them to track requests with Service Catalog reminders and due dates, with monthly, yearly, and any kind of recurring requests all in one place.

136. Projector & AV Equipment How is anyone going to see that gorgeous presentation if you don't remember to include the machine required to show it off?

137. Table Setup & Room Configuration What kind of meeting are you hosting? Should it be theater-style? Or are you looking for a more intimate feel with round tables? **138. Lectern/Podium** Every speaker is different, some love to move around a room, some love to stand behind something. Let your speaker make the best decision for their presentation.

139. Wi-Fi Code What's the Wi-Fi password? The first question you will get asked as soon as any meeting begins. Know the answer before the question is even asked.



140. Parking Information/Voucher

The city can be a scary place...for parking. Where to park? How much will it cost to park?

142. Notepad & Pens Encourage good old fashioned note-taking in your next meeting by providing pens and notepads to attendees.

143. Air Conditioning There's nothing worse than sweating through a meeting that is going to last a couple of hours. Submit a request to ensure the A/C is up and running for you.

144. Food & Beverage After a few hours of presentations and slide decks, it's time to reward your attendees with a snack and beverages. Cover all the taste buds with you specific requests.

"Our event takes over the entire area of downtown Austin. We now know if an asset has gone off the grid. Internally nothing has been lost since we started using Samanage." - SXSW 144. Food & Beverage After a few hours of presentations and slide decks, it's time to reward your attendees with a snack and beverages. Cover all the taste buds with you specific requests.

145. Photographer/Videographer

It's a special moment when you bring together customers, prospects, executives and team members. Request a dedicated person to capture every moment.

146. Budget & Payment Terms

Events and meetings off-site are especially expensive. Set the approvals and budgets for the event with a few simple steps. 147. Presenter Content What is the speaker going to be discussing at the event? Bring the team together in one place to nail down talking points.

148. Slide & Presentation Design What will the slides look like? Is this a fun meeting? Is this a formal meeting? Know your audience and make them comfortable with great designs specific to them.

149. Staging There's nothing worse than a large group and half can't see the speaker. Stand above and stand out.







The area of an enterprise that thrives on being organized and the illusive location of where packages are delivered.

The communication flow throughout the organization doesn't always make its way to the mailroom. It may seem like a long journey getting to the mailroom for those special questions and requests, but there's an easier way to submit a request and track it all without having the mailroom team to constantly hunt for those special inquiries.

150. Order Postal Supplies Don't slow down your operations because you forgot to order stamps or envelopes. Automate it!

151. High Speed Copying Oh no...the customer needs 300 copies of this report in an hour. Get those tasks out faster so you don't miss deadlines.

152. Report Binding Nothing better than making sure all of the work you put

into that report is bound correctly. The presentation is key!

153. Shipping Make sure everything is accurate for that package, from how it's wrapped, to where it's going, to when it needs to be sent.

154. Package Status A package is sent and the sender wants to know where it is and if it's arrived yet. Give them one place to ask.



This Might Be The End of the Book...

But it's Just the Beginning of Your Own Service Catalog Story.

In these pages, we featured a variety of departments and just a handful of services to get your own juices flowing. Today, there are hundreds of companies imagining and rapidly building a whole new generation of business service apps and workflows. Their focus - finding new and smarter ways to help make work life better. All of this is happening right now in Samanage Service Catalogs everywhere around the world.





We're Here to Help! The Samanage experience begins the moment you contact us. That experience is all about providing you with the most modern software tools available. Solutions built for ease of use and for rapidly building service apps across your entire enterprise. But that's simply the beginning of the experience.

At Samanage, we take this commitment to our customers very seriously. We pride ourselves in delivering exceptional services to help you discover the right services for your organization. Our Service Discovery Team can share best practices, identify quick and impactful wins and help you plan and build your Enterprise Service Catalog. Want to Know What's Possible? Let's talk! Want to see how it can be done? Samanage representatives are ready, willing and very able to help you make work life better.

> Feel free to reach out to us -

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