servicenow

Quick Guide

for Financial Management Services

HOW TO: Complete a support request

Support Request forms are usually assigned to you having been created, either by a user (through the Services Portal) or by another fulfiller.

However, you might create a Support Request from a New Call Record or from the Navigator (Support Request > Create New). When doing so, you will need to complete the following fields. Mandatory fields are indicated by the *. If you don't know what should be in a field, you can search by clicking the 🔍 associated with the field.

* **Requested by** — Person who asked for the item or service

Requested for — Person for whom the request was made (if not the "Requested by" person)

* **Business Service** — Choose the category for this request

Business Function — Choose an appropriate sub-category

Classification Code — To be added when you close the ticket.

Assignment Group — The support group associated with the category

Assigned to — The fulfiller who completes the support request. These options are limited by the Assignment Group selection.

Secure flag – Click this if there is confidential information in the ticket

Priority — Choose the priority level of the ticket, if necessary

Contact type — Select how the request was made

KCS Solution — Search for knowledge articles associated with this request, if necessary

Alternate Contact — List an alternate contact for the support request, if needed

* **Short description** — Briefly describe the request/issue

Additional Comments — Use this field to communicate with the person who has requested the item or service. Anything you put in this field is sent in an email to the requester.

Work Notes — Use this field to make notes for yourself or other fulfillers who might access this ticket. The requester will not see this content, unless they have fulfiller status in ServiceNow.

HOW TO: Close a support request

1. In the Status field, click **Resolved**.
2. Select a Clasification code - it is mandatory.
3. On the **Closure Information tab**, enter information about the ticket resolution in Close notes.
4. In the **Additional notes** field, type how you resolved the ticket or next steps for the requester.
5. Click **Save**.

HOW TO: Assign a task

1. Find the Task tab at the bottom of the Support Request form.
2. Click the **New** button.
3. Complete the form.
   The required fields are Priority, Assignment group, and Short description, but be as specific as you can be.
4. Click **Save**.
   The task is forwarded to the Assignment group you specified.

HOW TO: Close a task

1. Open the task.
2. Change the **Status** field to Complete or Cancelled, as appropriate.
3. In the **Work Notes** field, describe how you resolved the task or why you cancelled it.
4. Click **Save**.

HOW TO: Attach Knowledge to an SR

1. In a Support Request, find the **KSC Solution** field.
2. Click on the 🔍 to search for a Knowledge Article.
3. Click on the Knowledge Article that includes information appropriate to the request.
4. Click **Save**.
   The Knowledge Article is saved as part of the Support Request and is sent by email to the requester.

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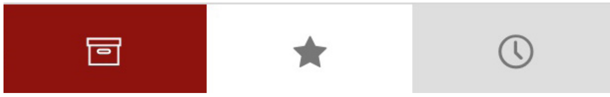
HOW TO: Log a call

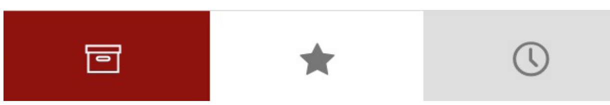
1. From the Navigator, click the Filing Box.



2. Open the Service Desk application and click **New Call**.
3. Complete the form.
   - If the call requires that a Support Request form be completed, choose **Support Request** for the Call type. Then, select the **Finance Catalog** in the required Catalog field.
4. Click **Save**.
5. If the call requires that a Support Request be created, click the **Create Support Request** button on the upper right side of the form.

HOW TO: Find my work or my group's work

1. From the Navigator, click on the Filing Box.



2. Open the Service Desk application.
3. Click **My Work** or **My Group's Work** or **My Group - Unassigned** to see the open tickets assigned to your group.

HOW TO: Fix the look of a form or a list

If you access a form (Support Request, Task) or a list (My Work, Open Support Requests) and the list looks unusual (e.g., columns out of order, fields missing), someone has probably changed the View of the form.

To fix it:

1. Click (in the upper left corner).
2. Click **View** and select **Default View.**

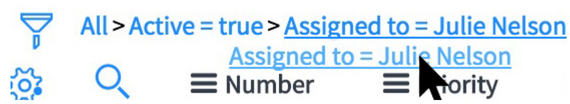
WHAT IS: The Work Notes List

People you add to this list will receive an email when you add text to the **Work notes** field.

HOW TO: Create my work list in favorites

1. From the Navigator, click the the Filing Box.

2. Open the Service Desk application and click **Assigned to me** or **My Open Tasks**.
3. Click the to the right of Assigned to Me or My Open Tasks.
4. From the Navigator, click the Star.
5. In the Favorites List, click **Assigned to me** or **My Open Tasks**.
   The list may be empty.
6. Click .
7. Select fields and add values.
   *Minimally, you should select **Active is true** and **Assigned to is [your name]**.*
8. Click **Run**.
   A list of open tickets assigned to you appears.
9. Click the last item in the filter list and drag it to the Favorites column.



You can edit the name of the new list by clicking on at

HOW TO: Communicate with a client

1. From within the Support Request, click the **Notes tab**.
2. In the **Additional comments** field, type your note to the customer.
3. Click the **Post** button.
   The note will be sent by email to the requester.

WHAT IS: The Watch List

People you add to this list will receive an email when you add text to the **Additional comments** field.

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