ServiceNow Support Request Fulfillment Guide

Stanford University
https://stanford.service-now.com/

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Table of Contents

1. Support Request Fulfillment Overview......................................................................................................................... 3
   1.1 Introduction to Support Request Fulfillment................................................................................................................ 3
   1.2 Goals of Support Request Fulfillment .......................................................................................................................... 3

2. How a Support Request is Submitted .......................................................................................................................... 4
   2.1 Services Portal ............................................................................................................................................................... 4
   2.2 Phone Call ..................................................................................................................................................................... 6
      2.2.1. The Call Record ................................................................................................................................................. 6
      2.2.2. The Support Request form ................................................................................................................................. 8

3. Support Request Fulfillment ........................................................................................................................................... 10
   3.1 Support Request Form ...................................................................................................................................................... 10
      3.1.1. Working a Support Request ............................................................................................................................... 10
      3.1.2. Closing a Support Request .............................................................................................................................. 11
      3.1.3. Request Visibility and Security .................................................................................................................. 12
   3.2 Ticket Tasks ................................................................................................................................................................. 12
      3.2.1. Ticket Tasks ....................................................................................................................................................... 12
      3.2.2. Closing Tasks .................................................................................................................................................... 13

4. More information ............................................................................................................................................................. 14
1. Support Request Fulfillment Overview

1.1 Introduction to Support Request Fulfillment

The Support Request Fulfillment process is the action you follow to respond to a request made by an end user. A “Support Request” generally refers to something that a user wants and/or needs that isn’t a repeatable transaction and does not require approval. Examples of support requests are answering specific questions about benefits or giving advice on how to process financial transactions.

1.2 Goals of Support Request Fulfillment

The goals of the Support Request Fulfillment process include:

- Providing a channel for users to request and receive non-technical services for which a pre-defined approval and qualification process is not required.
- Providing information to users and customers about the availability of support and the procedure for obtaining it.
- Providing efficient routing and fulfillment of requests for support in non-technical areas where a single support group can fulfill the request.
- To guide users through complex issues or tasks.
- To assist with tracking of user support needs.
- To ensure that requests for support are delivered in accordance with agreed upon service delivery targets.
- To ensure that all support requests are evaluated and addressed by the proper support unit.
- To monitor and report on the status of submitted support requests.
- To verify that fulfillment of the support request satisfied the user’s needs and meets applicable service targets.
2. How a Support Request is Submitted

2.1 Services Portal

Users will access the Stanford Services portal at services.stanford.edu to request help from Stanford service providers. When a user visits the Services Portal they can search for their needed service or browse through the catalog interface.

Users are presented with a choice of catalogs to choose from, for example, the Finance & Payroll catalog, Information Technology catalog, or Human Resources catalog. Within each catalog users can see categories like “Buying and Paying,” “IDs & Accounts,” and “Financial Reporting.”

If a user clicks into the Credit Card Merchant Services category, he or she will see both Support Request forms and Knowledge Articles in the center of the page with the full list of Service Categories in the left-hand navigation bar.
After a user finds the appropriate support request form, he or she will almost always see a form like the one to the left, though some forms may have additional custom fields.

When the user submits their Support Request, a confirmation will appear in a green box under the submit button, with a link to the “My Tickets” page. To view the full details of the Support Request, users simply click on the “My Tickets” link.

The form that the user submits creates a Support Request form within the ServiceNow system. This Support Request is routed to the team that can respond to the user’s request. A member of that fulfillment group is assigned to the Support Request and will complete the necessary tasks to provide what the user needs.
2.2 Phone Call

2.2.1. The Call Record

Users might request help by calling a Stanford help center. The agent who answers the call will complete a call record for every incoming call into a service desk or support center. The call form captures the reason for the call, which can be anything from a wrong number to collecting data about an issue or service need that can be transferred over to an Incident, Request, or Support Request form. To log a Call Record, follow these steps:

1. Navigate to [https://stanford.service-now.com/](https://stanford.service-now.com/)
2. To create a new call, select Call from the left-hand navigation, then click New Call.

3. Complete the form with the information provided by the caller.
4. Select the Call type to set the appropriate course of action into motion.

5. For the Support Request Call type, select the appropriate catalog.

6. Click Save.

7. After you click Save, you have the option to click the Create Support Request button on the Call form and you will be directed to the catalog you selected. A blue system message appears at the top of the page with the Call number and further instructions. Follow instructions below to complete the Support Request Form.
Guest User Note

If you are entering a Call for a user that is not in the user table, such as a new employee or contract worker, use the “Guest” user record by entering “Guest” in the Caller/Reported For fields. A new field of “Guest Name” will become mandatory. You will also have the option to enter an email address for the guest.

In addition, KCS (Knowledge-Centered Support) results will load at the bottom of the call form based on the text written in the Short Description Field.

KCS Results

You will notice that whenever possible the system will do work for you. For example:

- The **Primary Affiliation** field is only displayed after the **Reported for field** has been filled in, and it is always read-only since the system stores that information in the user’s record.
- **Opened** and **Opened by** will be auto-populated with the time and date the call record form was opened and the name of person who opened the form, respectively.
- The **Caller** will be the same as the **Reported For** field. Note that both fields can be changed in the event that the Caller is reporting an issue for someone else.
- When the **Reported For** user does not have a Stanford affiliation, another field called “**Alternate Email**” will be displayed underneath the Primary affiliation field.
2.2.2. The Support Request form

If you clicked the Create Support Request button after logging a Call Record, ServiceNow will provide you with the Catalog entries that are associated with the Catalog you referenced in the Call Record.

Choose the category and item from the catalog to initiate a Support Request. You will see the associated call number at the bottom of the form.
When the form is submitted, the Support Request is created and assigned to the workgroup associated with the catalog item. A blue system message will display the Support Request number and associated Call number and you will be returned to your active tickets list.

When a Support Request is created from a Call Record, information from the Call Record is transferred to the Support Request form. The following information is also transferred:

Field Name on Call → Field Name on Support Request

- Caller → Requested by
- Reported for → Requested for
- Short Description → Description

The Business Function, Assignment Group, and Short Description will be populated by catalog item that you selected.

The State of the request defaults to Open.

The Call record that led to the creation of the Support Request form is referenced in the “Related Calls” list at the bottom of the Support Request form.

Similarly, within the original Call Record, the Support Request form that was generated from the call is visible at the bottom of the Call form in the Related Tickets list.

Related Links
Create or Join Chat Room

<table>
<thead>
<tr>
<th>Related Tickets</th>
<th>Go to</th>
<th>Task type</th>
<th>Search</th>
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<table>
<thead>
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<th>Tasks</th>
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</table>

<table>
<thead>
<tr>
<th>Number</th>
<th>State</th>
<th>Short description</th>
<th>Task type</th>
</tr>
</thead>
<tbody>
<tr>
<td>SR00000869</td>
<td>Open</td>
<td>Assist with Axess Timecard</td>
<td>Ticket</td>
</tr>
</tbody>
</table>
3. Support Request Fulfillment

3.1 Support Request Form

3.1.1 Working a Support Request

If you receive a request from a user that did not come through the Services Portal or by phone, you might need to create a Support Request so that you can complete a request made by a user. This might happen if a user sends you an email asking for help or if you have a conversation in person about the help that they need.

To create a new Support Request, follow these steps:

1. Navigate to the Support Request module in the left-navigation and choose Create New.
2. Complete the fields in the order that they appear in the form. The form is designed for fields to auto-populate based on data entered in previous fields. The fields are described below the image:

- **Number** – A unique number identifying the record in the system (auto-filled)
- **Requested by** – The individual who requested the item or service
- **Requested for** – The user on behalf of whom the request was made; defaults to the same as the Requested by user
- **Business Service** – A mandatory field; the highest level of classification for support request items
- **Business Function** – The second level of classification for support request items
- **Item** – The lowest level of classification for support request items, is the same as the catalog item chosen by the service desk (will be blank when creating a Support Request directly)
- **Status** – Will default to Open
- **Assignment Group** – The support group associated with the catalog item (auto-filled)
- **Assigned to** – The fulfiller who will complete the support request
- **Secure flag** – Gives fulfiller ability to mark ticket as secure
- **Priority** – Allows the fulfiller to set the priority level of the support request
- **Contact type** – Shows the fulfiller where the support request originated (auto-filled if information is available through portal submission)
- **KCS Solution** – A field to attach a Knowledge Base article that would address the support request (will be auto-filled if a particular article is associated with the ticket).
- **Alternate Contact** – A field to list an alternate contact for the support request, if needed
- **Classification Code** – This field allows fulfillment groups the ability to categorize tickets at a deeper level for reporting. It is the final level of categorization and mandatory upon resolution.
Cues let a fulfiller know the status of a field. The following states appear in the same order pictured in the image here:

- **Read-Only:** When a field (e.g., Department) cannot be edited by a user the field will appear with a gray background.
- **Required still needed:** When a bright red asterisk appears next to a field (like the Location field above), the user will not be able to submit or save the form until an accepted value is entered into the field.
- **Required not needed:** When the asterisk next to the field is gray (see the Category field), the field is required but the value within is acceptable and already saved.
- **Required but changed:** When the asterisk next to a field is a faded red (see the Subcategory field), the field is required and has an acceptable value, but has not yet been saved.
- **Invalid entry:** When a field’s background color turns red (as in the Configuration Item field), the field has an invalid value entered and cannot be saved until the value is fixed.

3. If you need help selecting the value for a field, click on the Magnifying glass to search through available fields in a popup window.

   - Some fields have a small magnifying glass next to them ( ) indicating that they are reference fields. Reference fields can be completed by clicking on the magnifying glass and selecting the desired item. Another option is to start typing text in the field, which will leverage type-ahead behavior to quickly select values you’ve used before.

4. Click Save to complete the ticket creation.

**3.1.2. Closing a Support Request**

When you have completed the work required to fulfill the user’s request, the next step is to close the Support Request ticket. Follow the steps below to close the Support Request ticket.

1. Make sure all associated tasks have been completed, then change the Status field to “Resolved.” You will not be able to resolve a Support Request until all of the related Tasks are closed.
2. The Classification Code field becomes mandatory. Choose a Classification Code if you have not already.
3. Navigate to the Closure Information tab and enter the request resolution details in the “Close notes” box. These details will be sent by email to the end user.
4. Click Save to close the ticket.

### 3.1.3. Request Visibility and Security

Some service catalog items within ServiceNow have extra security features due to data security concerns. Requests submitted via these catalog items are secure by default. Support Requests that are designated as secure are restricted and are not visible to ServiceNow users who are outside of the designated fulfillment group.

**Secure checkboxes** appear on the Support Request record and the Ticket Task record(s). If the workgroup assigned is secure by default, the checkbox will be checked at the Ticket Task level as well.

Fulfillers may occasionally need to secure a request if a user submits confidential information that should not be visible to others outside of the fulfillment group. In these situations, fulfillers should check the secure checkbox at the Support Request level to secure the request and related tasks.

### 3.2. Ticket Tasks

#### 3.2.1. Ticket Tasks

A related list at the bottom of Support Request records displays **Ticket Tasks** associated with the Request’s fulfillment. These tasks are generated by the fulfiller assigned to a complete a Support Request when a group other than the fulfillment group is needed to complete a task so that the request from the user can be fulfilled.

There is a tab at the bottom of the ticket task labeled **Jira Integration Fields**. This field will allow you to send a task from ServiceNow to a fulfillment group that does their work in Jira—typically development and other highly technical groups. You will be required to select the Jira Project and Component as well as enter a description of the SDLC task needed; you will only see projects you have access to in the drop down menus. If you do not have Jira access, you will not have any fields and may ignore this task type.
1. To create a Task, select “New” on the Ticket Tasks tab.
2. Complete the fields.

Task form fields:

- **Number** - A unique number identifying the Ticket Task
- **Created by** – The fulfiller of the parent Support Request record
- **Parent** – The number of the parent Support Request
- **Priority** – A mandatory field that sets task priority for the assignee
- **Status** – The task status; will default to Open
- **Assignment Group** – A mandatory field to set the support group that will complete the task
- **Need by** - A field to request task completion date.
- **Assigned to** – the individual within the Assignment group to whom the Task is assigned, if known
- **Created** – Marks what time the ticket task was created
- **Short Description** – a description of the task entered by the fulfiller or carried over from the parent Support Request

3. Click Save.

### 3.2.2. Closing Tasks

When you have completed the work necessary to the task assigned to you, the next step is to close the Ticket Task. Closing the Ticket Task will alert the fulfiller of the Support Request that your work is finished.

Note: If a request or task needs to be resolved by another assignment group, the record must be reassigned to the correct group. When you change the assignment group and assigned to fields, you must enter information into the work notes field.
Follow the steps below to close a Ticket Task:

1. Open the Ticket Task.
2. Fill in the Work Note field with a description of how you completed the task.
3. Click the Close Task button at the top of the Task form.

After a record has been closed, all of the fields will become read only and the record can only be used for reporting and historical review. After closure, only the Work Notes field can be edited.

4. **More information**
   For more information about using ServiceNow and ServiceNow Request Management, consult the ServiceNow Product Documentation available at the links below:

   - **Product Documentation main page**: [https://docs.servicenow.com/](https://docs.servicenow.com/)
   -