

servicenow

Quick Guide

for Request Fulfillers

HOW TO: Create a request from a Call

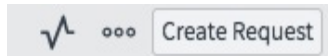
Request forms are usually assigned to you after they are created by a user (through the Services Portal) or by another fulfiller.

However, you might create a Request from a New Call Record.

1. From the Navigator, click the Filing Box.



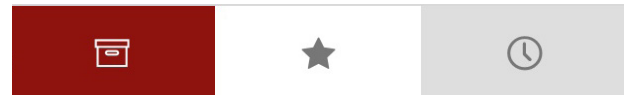
2. Open the Service Desk application and click **New Call**.
3. Complete the form, choosing **Request** for the Call type.
4. Choose a **catalog** from Catalog dropdown
5. Click **Save**.
6. Click the **Create Request** button on the upper right side of the form.



7. Select the appropriate category and form for the request.
8. After you've selected the proper request form, click the **This request is on behalf of someone else** checkbox.
9. Each form is different based on the information needed to fulfill the request. Complete the fields in the form.

HOW TO: Create a request from the catalog

1. From the Navigator, click the Filing Box.



2. Open the Service Catalog application and click **Catalogs**.
3. Select the **IT Catalog** and navigate to the proper form for the request.
4. Click the **This request is on behalf of someone else** checkbox.
5. Each form is different based on the information needed to fulfill the request. Complete the fields in the form.
6. Click **Submit Request**.
7. Click on the RITM number on the Order Status page.
8. Since this was requested by someone other than you, change the Requested by and Requested for fields to the name of the client requesting the service.
9. Click **Save**.

HOW TO: Attach Knowledge to a Request

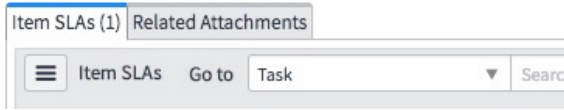
1. Access the TASK level of a Request.
2. Find the **KSC Solution** field.
3. Click on the 🔍 to search for a knowledge article.
4. Click on the knowledge article that includes information appropriate to the request.
5. Click **Save**.
The knowledge article is saved as part of the Request and is sent by email to the requester.

HOW TO: Close a request

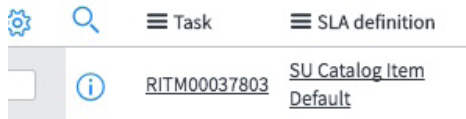
1. Access the TASK level of a Request.
2. In the **Request Item Additional comments** box, type a note to the client describing the work you did to complete the request.
This text is sent by email to the requester with a notification that the ticket is closed.
3. Click **Close Task**.
The ticket is closed and cannot be reopened.

HOW TO: View more information about a Request

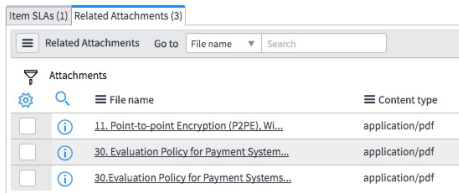
1. Scroll to the bottom of the TASK view and find the Item SLAs tab.



2. To review information included on the RITM, click the RITM number.



3. To review and download attachments, click on the Related Attachments tab.

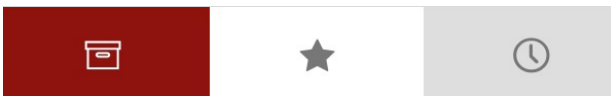


HOW TO: Customize a List

1. When viewing any list in ServiceNow, to filter the data shown in the list, click .
2. Add search criteria.
3. Click **Run**.
The list that displays includes the data that matches your selections.
4. To customize the columns included in the list and the order in which they appear, click .
5. To add columns, click the column name under Available and click the right arrow OR to remove columns, click the column name under Selected and click the left arrow
6. To change the order of the columns, select the name of the column and then click the up or down arrow to move the column where you want it.
7. Click **Save**.
The list now appears with the columns you've selected in the order you specified.
8. To save the list for future review, click .
9. Click **Create Favorite**.
10. Enter a name for the list, select a color and an icon.
11. Click **Done**.

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: Communicate with a client

1. From within the TASK of a Request, in the **Request Item Additional comments** field, type your note to the client.
2. Click **Save**.
The note will be sent by email to the requester.

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: Fix the look of a form or a list

If you access a form (RITM, TASK) or a list (My Work, 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**.