ServiceNow

Request Management

Version 1.0

Definition of Commonly Used Terms

ITIL: An acronym for Information Technology Infrastructure Library, ITIL is a set of practices for IT service management (ITSM) that focuses on aligning IT services with the needs of business.

ITIL User: ServiceNow term for a technician.

Incident: An unplanned interruption to an IRT Service or a reduction in the quality of an IRT Service. For example: A user's email client stops working.

Request: A request submitted by a user for some type of service, software or hardware. Requests generally refer to something the user wants and/or needs but does not already have, such as a laptop, email resource or Confluence site.

Service Catalog: A pre-defined list of services offered by an organization. The Service Catalog provides a means for faculty, students and staff to view or request technology services.

Change: The addition, modification or removal of anything that could have an effect on IRT Services.
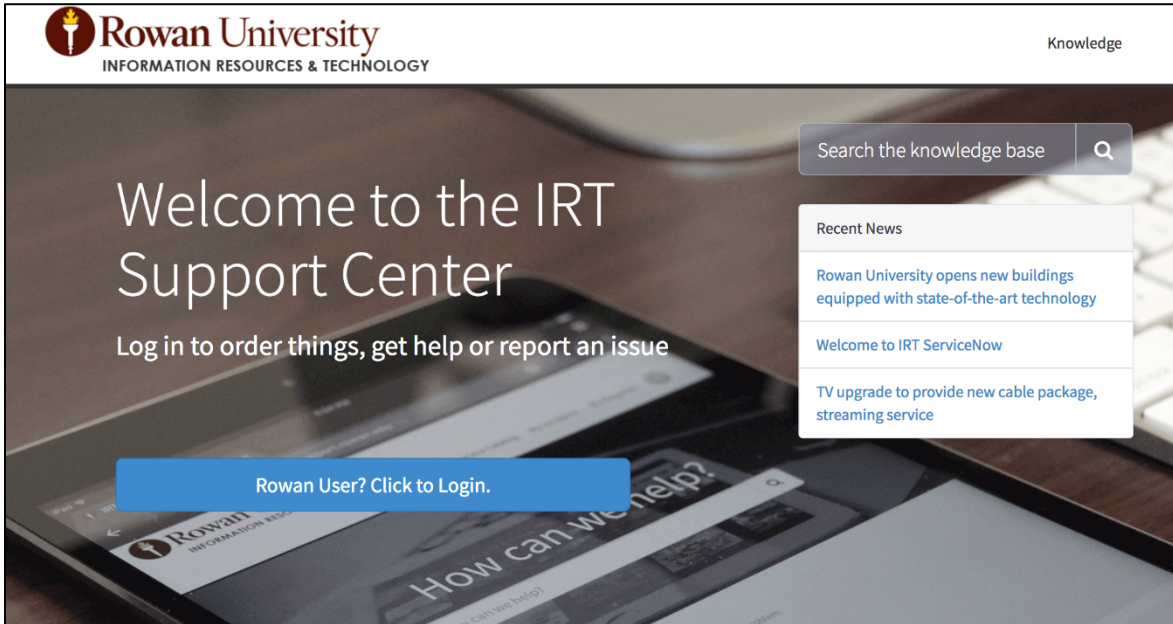
Caller: ServiceNow term for end user/customer.

An online version of this document, information about supported browsers and other resources can be found here: http://www.rowan.edu/servicenow-resources

Log into ServiceNow

http://support.rowan.edu (https://test.support.rowan.edu **for training**)

If you are already authenticated to CAS you might bypass this login page.

Once **l**ogged into the Support Portal, click "**Technician**" at the top and you will be redirected to the full ServiceNow application.

If you are in the application and would like to return to the web portal, you can re-enter the link in your browser with an **/sp** at the end (i.e. support.rowan.edu/sp).

Safari Warning: *A recent update to Safari has impacted the appearance of ServiceNow. ServiceNow is aware of the issue and is investigating a resolution. The recommended workaround is to use a different browser, such as Chrome, until the issue can be resolved.*

The Service Catalog

The Service Catalog provides a means for faculty, students and staff to request services and purchase hardware. Services are pre-defined and associated with automated workflow processes that notify approvers and staff of the tasks or activities that need to be performed in order to deliver the requested service.
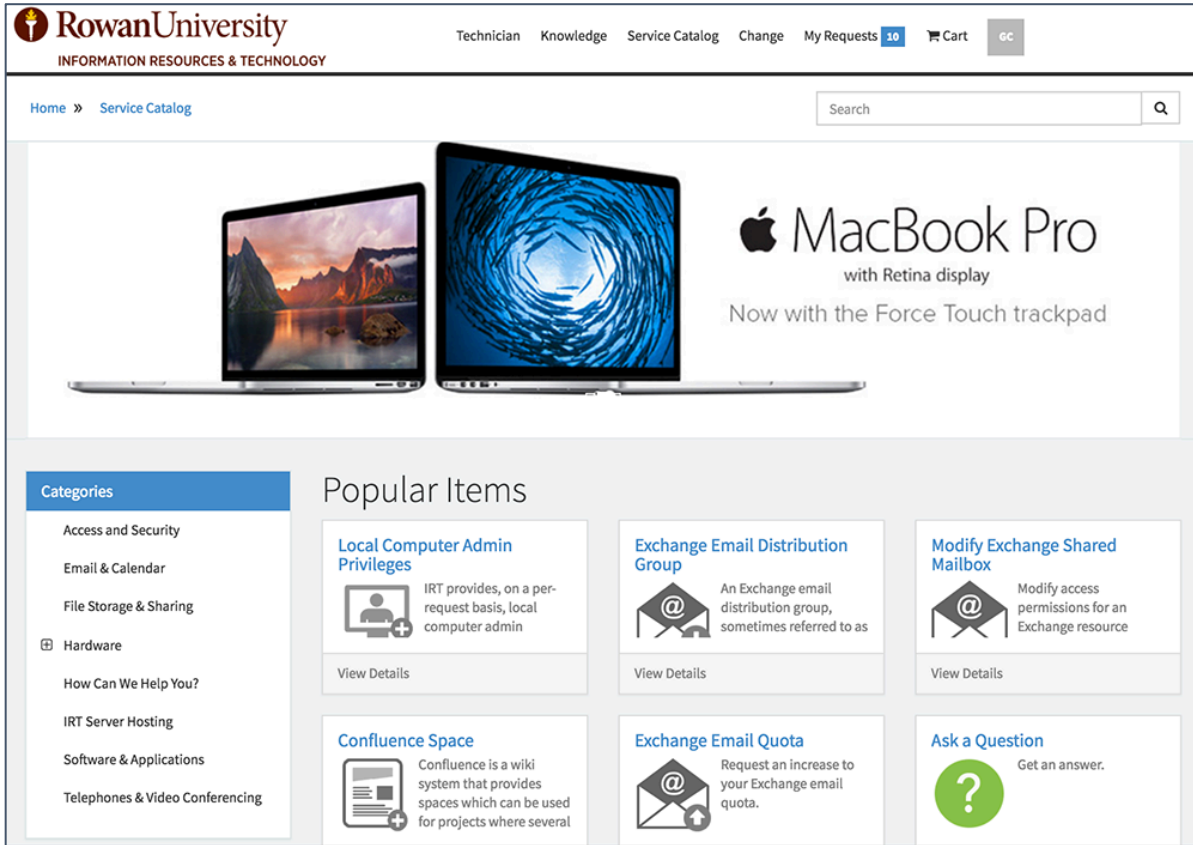
There are currently catalog items available for Exchange Resource Mailboxes, Email Distribution Groups, Quota Increases and Confluence Sites, among others. More items will be added throughout phase two of our ServiceNow implementation.

The University community can use the catalog in the Support Portal to submit requests for service, monitor and check the status of a request or incident, and search the knowledge base.

Once logged into the Support Portal, users can select **Request Something** to open the Service Catalog.

Users can search for the item they are looking for in the top right or browse the categories on the left. Only categories that contain active catalog items will be visible.

Clicking on the "**Email & Calendar**" category, for example, will show all available email related catalog items.

Selecting one of the items will open a detailed form that the user can fill out and then click "**Submit**" when finished. Unlike Hardware catalog items that can be ordered in multiple quantities and processed through the "Cart," requests for "services" can only be submitted one at a time.

RowanUniversity
INFORMATION RESOURCES & TECHNOLOGY

Technician   Knowledge   Service Catalog   Change   My Requests 1   🛒 Cart 3   GC

Home » Service Catalog » Email » Exchange Resource: Shared Mailbox

Search 🔍

Exchange Resource: Shared Mailbox

An Exchange resource shared mailbox is a separate mailbox for users to share.

This request will create a new resource mailbox, if you already have a shared mailbox and simply wish to modify access to it please email support@rowan.edu

If you are looking for an Exchange email distribution group, sometimes referred to as an alias, that forwards copies of emails to one or more users, please choose "Exchange Email Distribution Group / Alias" from the catalog.

* What would you like as the display name for this mailbox?

Example: Budget Office

* What would you like as the email address?

Example: budgetoffice@rowan.edu

* What users will require access? (These users will be given full access to the mailbox)

Which users should have the ability to send from this mailbox?

◉ All requested users

◯ Only certain users

Additional comments or special instructions:

Submit   📎 Add attachments

Users can check the status of their request at any time by selecting it on the homepage under "**My Open Requests**" or the "**My Requests**" drop down at the top of the page.

Users can see what stage their request is in, add a comment to the request or upload an attachment.

Creating a New Call: Request

A request, like an incident, can be generated directly from the New Call form. If the user would like an item currently available in the Service Catalog, you can either **direct them to the Support Portal** at **http://support.rowan.edu** or you can walk them through the process by selecting "**Request**" in the Call Type field.

There are currently request items available for Exchange Resource Mailboxes, Calendars, Distribution Groups, Quota Increases, Local Computer Admin Privileges, and new Confluence spaces, among others.
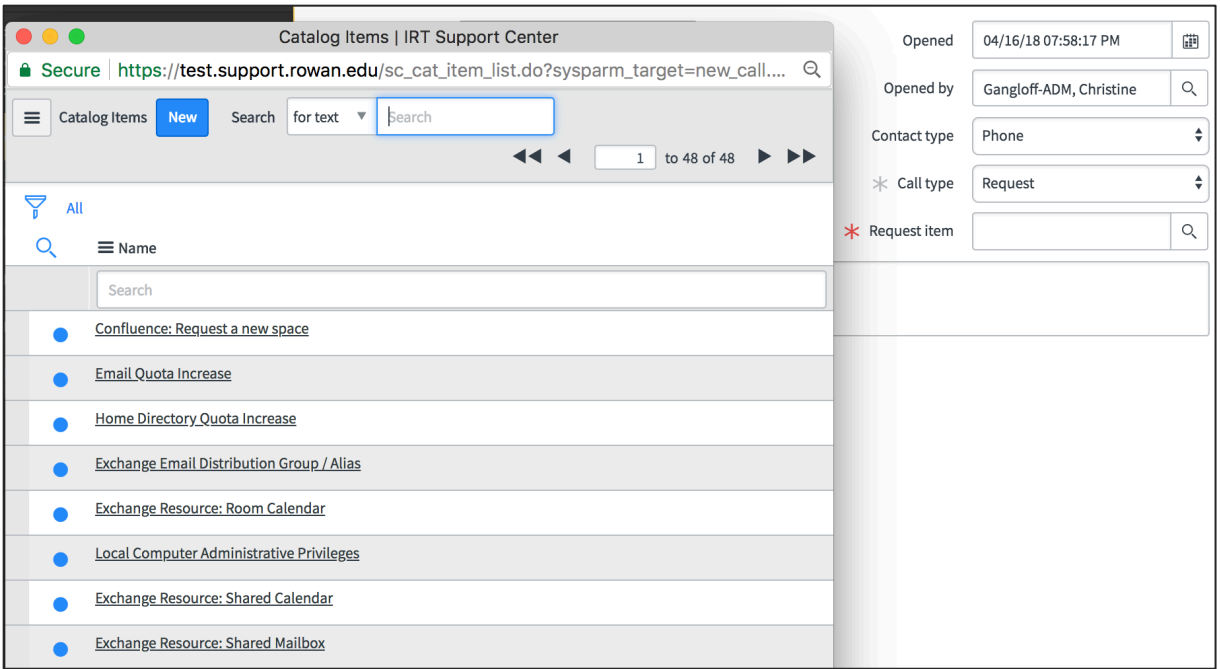
For example, if the user is requesting admin privileges on their computer, choose "**Request**" as the Call Type.
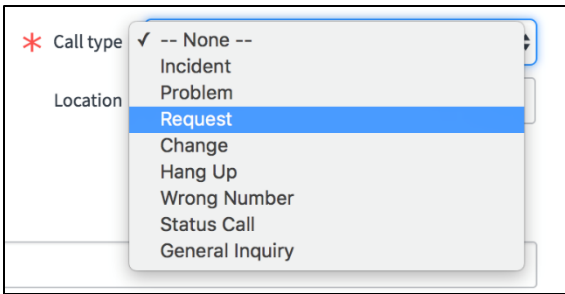
A "**Request Item**" field will then appear below the "Call type" field.
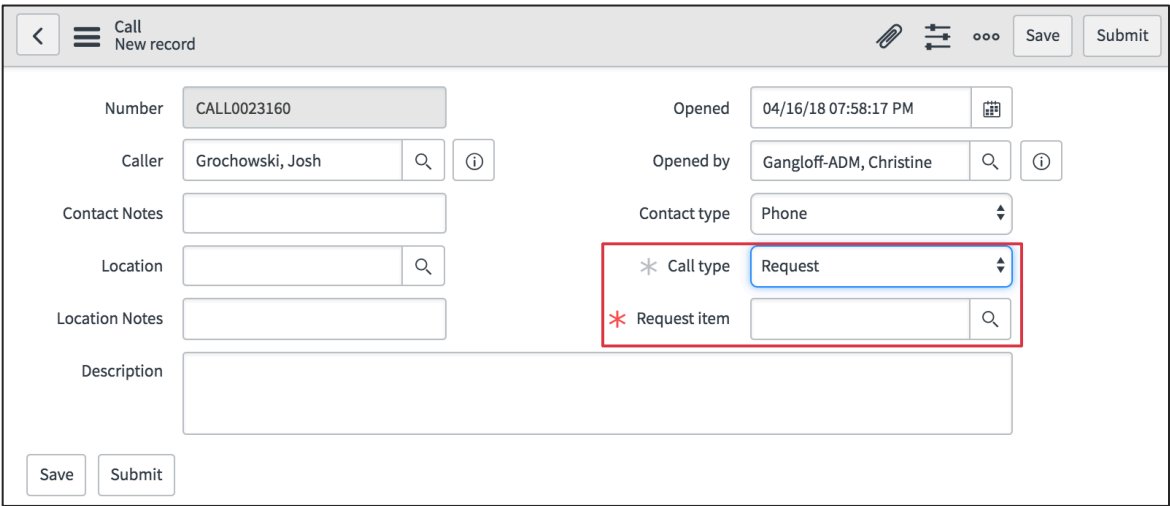
Click the magnifying glass icon next to the "**Request Item**" field to see a list of available Service Catalog items.

Search or browse for the appropriate catalog item. In this case, search for "*admin" and choose the "**Local Computer Admin Privileges**" catalog item.
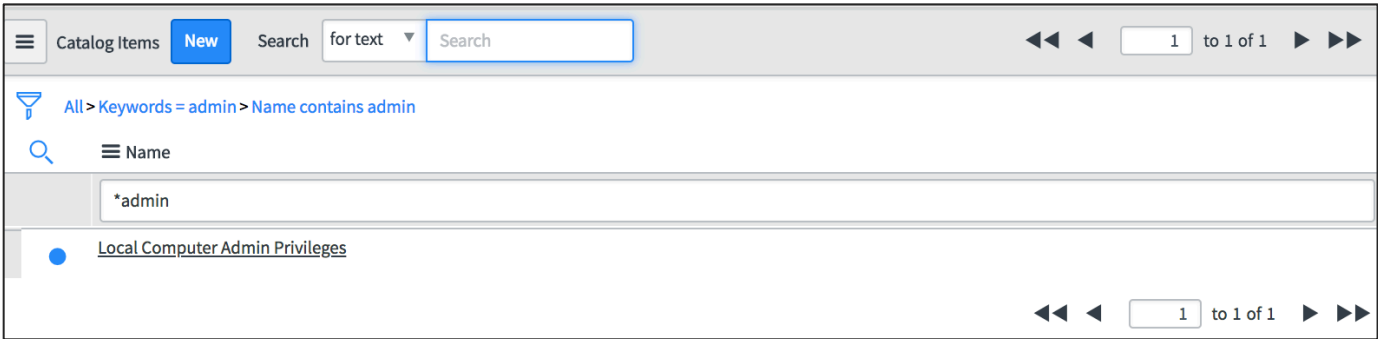
Select the appropriate catalog item and click **"Submit"** and you will be taken to the Request form for the item you selected. Data from the call will be transferred to the new Request record.

NOTE: Some of the more complex forms do not look as polished in the technician view as they do on the Support Portal. We recommend you direct users to fill out the forms in the Service Catalog whenever possible.

Fill out all of the required information for the request and then click "**Order Now**" in the top right of the form.

On the next page, you can verify that the Caller has been set correctly in the "Requested for" field and click the arrow next to the item's description to verify the request details. To submit the request, click "**Checkout.**"

The Call and Request record are now linked. The request will have a workflow associated with it that will assign the task to the appropriate group to complete the request.

To see calls that are associated with a particular request, you can navigate to the bottom of the request form and click on the Calls tab.

Creating a Request from an Incident

If you determine an incident should be fulfilled as a request, knowledge articles are available for each request item with a link to the appropriate request form.

Depending on the request, search the Knowledge Base for "request exchange" or "request confluence" etc. and then resolve the incident with that article which will direct the user to fill out the request form in the catalog. Use the Close Code of "Transferred to Request" to indicate that the incident was resolved in this way.

Request knowledge article example:

REQUEST: New Confluence Space

KB0012754

☆☆☆☆☆   1 views

Confluence is a wiki system that provides spaces which can be used for projects where several users (or just one) can create a set of pages to be accessed by a number of users - who may be able to just read the pages, comment on them, or modify the content as well.

You can now request a new Confluence space through our Service Catalog.

Please visit the Confluence: Request a New Space form.

You will need to login to the Support Portal using your Rowan network username and password.

If you need assistance filling out the form, please call the Support Desk at 256.4400.

Working with Requests

Every request will generate three types of records: a REQ (request) an RITM (requested item) and a TASK. The Task is what will be assigned to the group that will be responsible for fulfilling the request.

If you use the "**My Work**" or "**My Groups Work**" modules (described in more detail in the next section) you will see Tasks assigned to you or your Assignment Group.

Catalog Task Assignment Notification

When a Catalog Task is assigned to you, you will receive the following email notification containing the request details and information from the task's description. This email can be helpful because it contains hyperlinks to instructions for completing the task. The "Description" field on the task form contains this information as well, but the field is text-only and the KB articles will not be hyperlinked.

You have been assigned Catalog Task TASK0010754

RU **Rowan University Support**
Gangloff, Christine D.
Monday, April 16, 2018 at 9:51 PM
Show Details

Task Details:

Short Description: New Exchange Email Distribution Group / Alias
Assignment group: System Administrators
Assigned to: Gangloff, Christine
Due date: 04/16/18 08:57:16 PM EDT
Click here to view Task: TASK0010754

Request Item Details:

What would you like as the display name for this distribution group?: NSS Test Group
What would you like as the group's email address?: nsstest@rowan.edu
Which user(s) should be set as group members and receive email sent to this group?:
hartigan@rowan.edu | speak@rowan.edu
Who should be designated as the 'owner' of this Distribution Group? This user will be able to update the members.: gangloff@rowan.edu
Should users have the ability to send email from this group's address? (@rowan.edu users only): yes

---

Description:
Follow the instructions below to create the new exchange distribution group.

https://support.rowan.edu/kb_view.do?sysparm_article=KB0012481

If the user has requested "Send As" permissions for the members, follow these instructions as well:

https://support.rowan.edu/kb_view.do?sysparm_article=KB0012483

Once completed, add a comment to the task confirming what the name of the group is and let them know that an automated message with further instructions will follow. Then select "Close Task."

Once a task is assigned to you, you can open it through the link in this email notification or by clicking the **TASK****** number from the **My Work** view.

Task Description

On the Catalog Task form you will see instructions in the "**Description**" field near the top of the form.

These instructions may include links to knowledge articles detailing the technical steps required to complete the request.

If you scroll down the Task form, you will see tabs containing the request details, comments and work notes.

Request Details

The "**Request Details**" tab contains all of the original request form questions and responses in plain text. This is the information you will use to fulfill the request.

Comments

The "**Comments**" tab has the Comments dialog box.

Enter a comment and click "**Save**" in order to post the comment and email it to the "Requested For" user. A log of all comments will be shown below the text box.

Work Notes

The "**Work Notes**" tab has the Work Notes dialog box and the Activity log below it.

Editable Request Details

The "**Editable Request Details**" tab contains the request details in editable form. This can be used if the customer contacts you and needs to change a variable, e.g. to add another user for access, change the name they requested for a shared mailbox etc.

PLEASE make a work note indicating that updates were made to the request details as those variable changes are not reflected in the original request details or in the activity log.

Approvals

Some requests will have approvals associated with them. Tasks are not generated for a request until it has been approved. You can view approvals at the very bottom of the Requested Item (RITM) form, under the "Related Links" section on the "**Approvers**" tab.

To view the approval, click the "**Tombstone**" icon next to the "Parent" field containing the RITM number at the top of the Catalog Task form.

On the Requested Item form, scroll to the bottom of the page and select the "**Group approvals**" tab or the "**Approvers**" tab to view who approved the request.

To go back to the Task, click the "**Catalog Tasks**" tab and then the **TASK0010XXX number**.
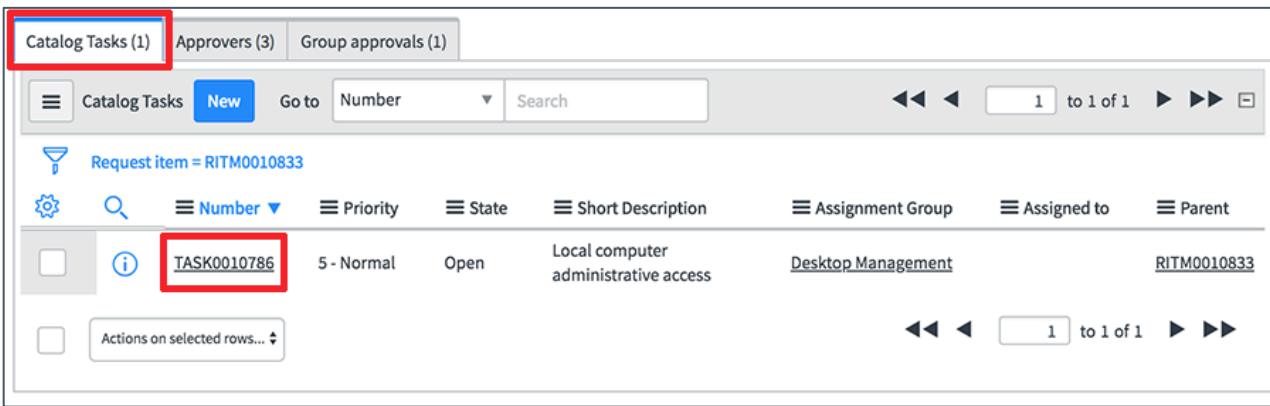
Closing the Task

Once you have completed all of the instructions from the task's **Description** field (this may include sending a comment to the user), click "**Close Task**" either on the form header, or below the tabbed section of the form.
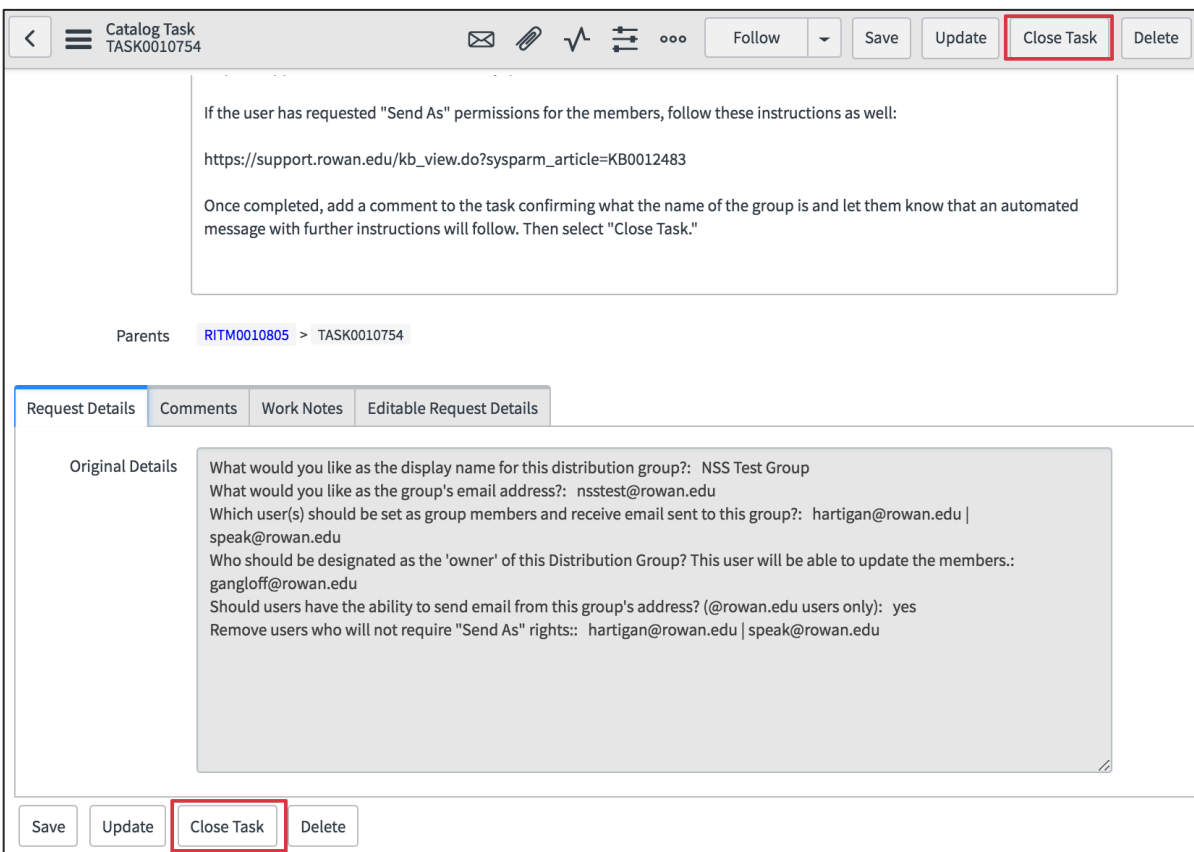

This will close all levels of the request (REQ, RITM and TASK) and send a completion notification to the "Requested for" user. Depending on the catalog item, completion notifications may be customized and contain links to Knowledge articles with detailed instructions for using their requested service. Other tasks may receive a generic "Your Request has been completed" notification. This will happen automatically and will be indicated in the task's "Description" field.

Managing Your Work

TIP: *We recommend using the "**My Work**" and "**My Groups Work**" modules. These modules show all incidents, tasks, and approvals assigned to you. If you are just looking at the Incident module, for example, you may miss catalog tasks assigned to you.*

Search the Application Navigator for "My Groups Work" and "My Work" and add those modules to your Favorites by clicking the Star Icon next to their name.
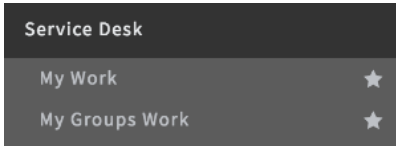
This will make them available from the Favorites menu.
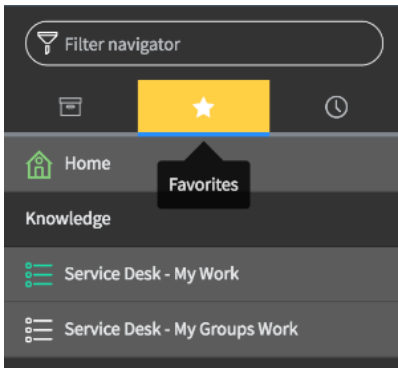
My Work: Active tasks, incidents and changes that are assigned to you.

My Groups Work: Active tasks, incidents and changes that are assigned to all of the groups you are a member of.

My Work

Across the top of the list in both "**Work**" views, you will see the following columns:

- **Number:** The task, incident or change's assigned number. If you click this hyperlinked number, it will display the form.
- **Short Description:** The short description from the task, incident or change form.
- **Task Type:** This shows whether the item is an incident, change or task (usually associated with a service request).
- **Requester:** This will show the customer who requested the task, incident or change.
- **Assigned to:** Displays the name of the technician the incident is assigned to.
- **Opened:** The Date and time that the incident was opened.
- **State:** The current status of the task, incident or change, such as "New," "Active" or "Resolved."
- **Assignment Group:** The group that the task, incident or change is assigned to.
- **Priority:** The level of priority assigned to the item.

My Groups Work

When you select the **My Groups Work** module, you will see the following screen showing any incidents, tasks and changes assigned to the groups you are a member of.

You can see at the top in blue it displays a "breadcrumb" that shows what Groups you are a member of and the States it is filtering.

You can change what is being displayed by clicking the filter icon on the left and adjusting the filter.

To open a task, click on the hyperlinked number in the list view.

≡ Number	≡ R	≡ W	≡ Short Description	≡ Task type
TASK0010754	✉	🗐	New Exchange Email Distribution Group / Alias	Catalog Task

From there you can see the details of the task and assign it to yourself or someone else by clicking the magnifying glass icon next to the **Assigned To** field.