DIVISION OF
INFORMATION TECHNOLOGY SERVICES

ServiceNow: User Guide

Spring 2018, Version 2

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Introduction

ServiceNow is an online ticketing system that allows Cal State LA users to report IT issues and request IT services. The system keeps a log of all activities and automatically emails status updates, allowing users to track the status of an incident ticket or a service request that has been submitted. This handout provides an overview of the ServiceNow user interface and covers how to report an issue, request a service, check the status of a ticket, approve or reject a request, delegate approvals, search the knowledge base, and get help.

Logging In

You can log in to ServiceNow from any device with an internet connection using your MyCalStateLA ID account.

To log in to ServiceNow:

1. Open a web browser and go to http://calstatela.service-now.com.
2. On the **ServiceNow** login page, enter your **MyCalStateLA ID** username and password in the corresponding fields, and then click the **Login** button (see Figure 1).

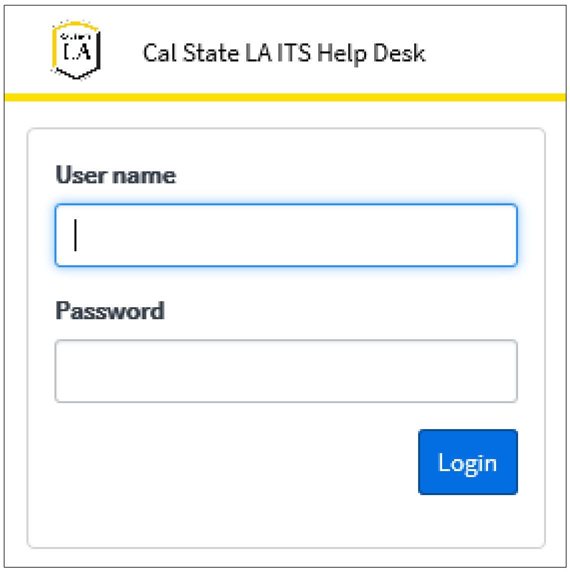

Figure 1 – ServiceNow Login Page

Overview of the User Interface

The ServiceNow user interface is composed of three main sections (see Figure 2).

1. The **Banner** frame is located at the top of the user interface and provides access to account settings, system settings, and help.
2. The **Navigation** bar is located on the left side of the user interface and provides access to all available applications and modules, your favorites, and recently viewed items.
3. The **Content** frame is located on the right side of the user interface and displays homepages, lists, or forms.

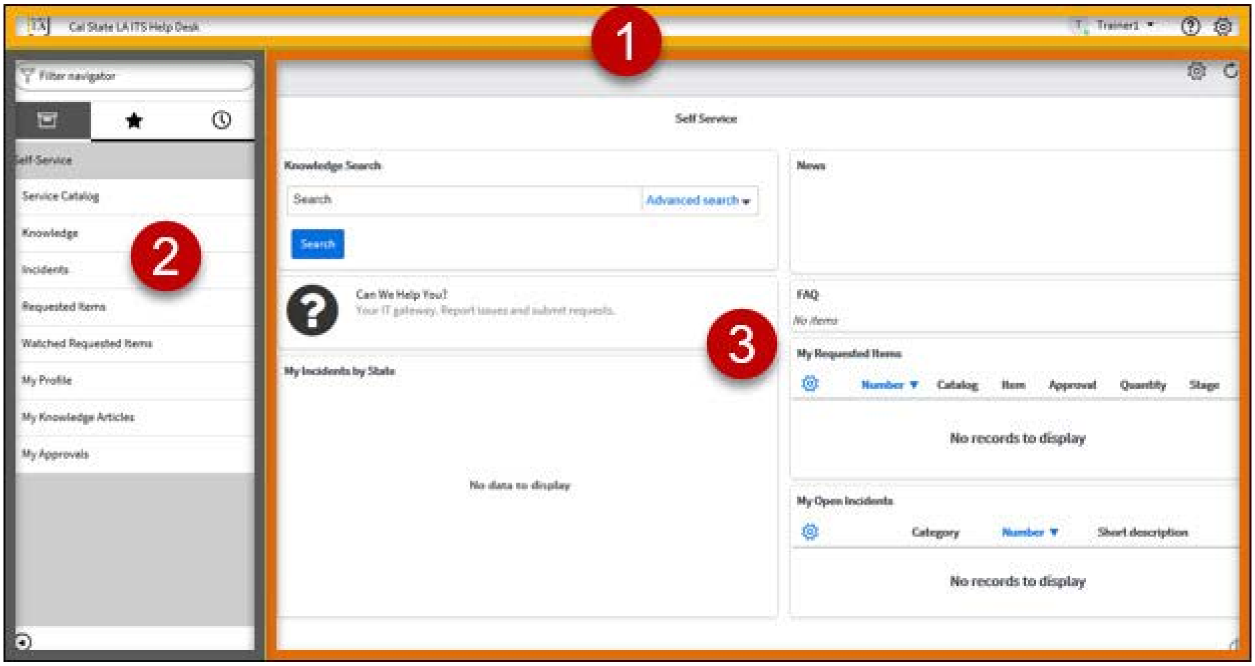

Figure 2 – ServiceNow User Interface

Banner Frame

The **Banner** frame runs across the top of every page and provides access to account settings, system settings, and help (see Figure 3).

1. Clicking the **Cal State LA** logo displays the Self Service homepage in the Content frame.
2. The **User** menu displays the name of the logged in user. Clicking the menu provides access to the following options:
    - **Profile** displays your user profile page in the Content frame.
    - **Logout** logs you out of the system and returns to the login page.
3. Clicking the **Help** icon opens the Help sidebar on the right side of the user interface which includes a link to the official ServiceNow product documentation.
4. Clicking the **Settings** icon opens the System Settings pop-up window which allows you to customize the user interface and set your preferences.

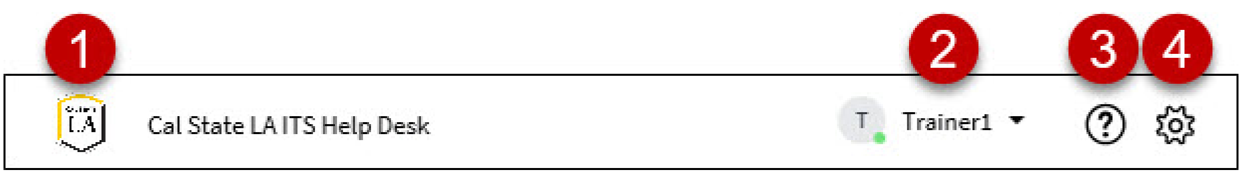

Figure 3 – Banner Frame

Navigation Bar

The **Navigation** bar (also called the **Application Navigator**) provides access to all available applications and modules, your favorites, and recently viewed items (see Figure 4, Figure 5, and Figure 6). You can use the **Filter navigator** box at the top of the Navigation bar to quickly find an application or a module. As you enter text, the bar shows only matching applications and modules. You can collapse or expand the Navigation bar by clicking the **Minimize/Maximize Navigator** icon at the bottom of the bar. In the collapsed view, only favorites are displayed and they appear as icons.

The Navigation bar consists of three tabs.

1. The **Applications** tab, represented by a **Storage Box** icon, displays all available applications and modules (see Figure 4). Each application appears as a section on the tab. All modules that an application contains are listed below the application label. You can collapse or expand an application by clicking its label. Clicking a module opens it in the Content frame.
2. The **Favorites** tab, represented by a **Star** icon, displays items you have added as favorites (see Figure 5). Any application, module, list, or record can be marked as a favorite. By default, the Favorites tab includes a link to the homepage.
   - To add a favorite for an application or a module, click the **Applications** tab, point to the application or module, and then click the **Star** icon that appears on the right.
   - To reorder favorites in the list, click the **Favorites** tab, click the **Edit Favorites** icon at the bottom of the **Navigation** bar, drag a favorite to a new location in the list, and then click the **Edit Favorites** icon to exit edit mode.
   - To delete a favorite, click the **Favorites** tab, point to the favorite, and then click the **Remove Favorite** icon that appears on the right.
3. The **History** tab, represented by a **Clock** icon, displays items you have recently accessed (see Figure 6). Items appear in chronological order from most to least recently accessed.

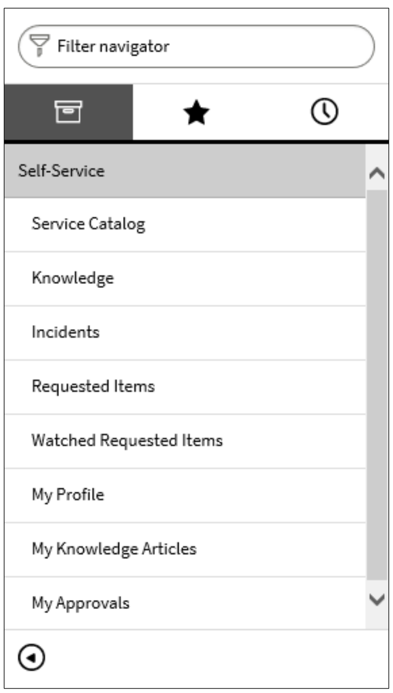

Figure 4 – Applications Tab of the Navigation Bar

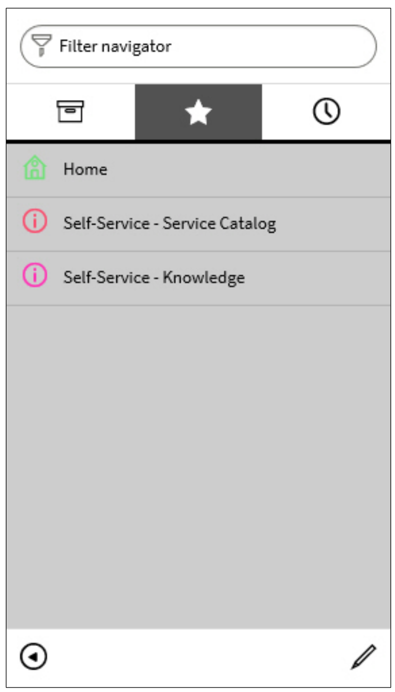

Figure 5 – Favorites Tab of the Navigation Bar

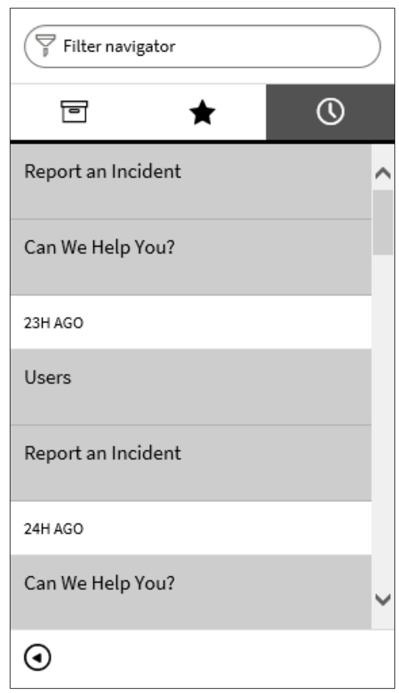

Figure 6 – History Tab of the Navigation Bar

Content Frame

The **Content** frame displays homepages, lists, or forms. When you log in to ServiceNow, the **Self Service** homepage appears in the Content frame (see Figure 7). It gives an overview of the information you access often and provides quick access to commonly used features.

1. The **title** of the homepage appears at the top of the Content frame.
2. Any **widget** that has been added to the homepage appears below the title. Widgets are sections of content that provide information and links.

3. The **Refresh** icon in the upper-right corner of the homepage is used to refresh the page. You can specify a refresh interval of **5 minutes**, **15 minutes**, **30 minutes**, or **1 hour** by clicking the **Settings** icon next to the **Refresh** icon and selecting the desired option. The default is **Off** (no refresh).

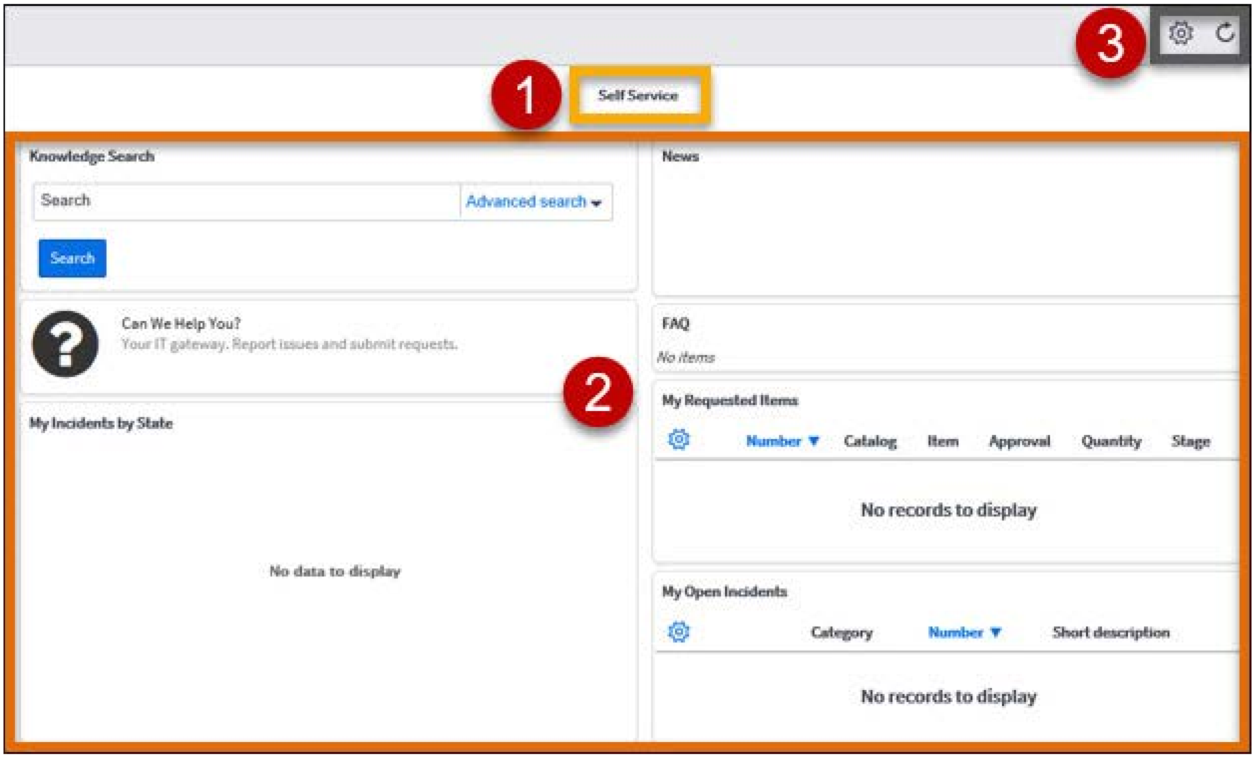

Figure 7 – Self Service Homepage in the Content Frame

Reporting Issues

ServiceNow provides a convenient method for reporting IT issues. You can access the system 24/7 to create an incident ticket and track it until the issue has been resolved.

To report an issue:

1. If necessary, click the **Cal State LA** logo in the **Banner** frame to display the **Self Service** homepage.
2. On the **Self Service** homepage, click **Can We Help You** (see Figure 8).

Figure 8 – Can We Help You Section of the Self Service Homepage

3. On the **Can We Help You** page, click **Report an Incident** (see Figure 9). The **Report an Incident** form opens in the **Content** frame (see Figure 10).

   NOTE: Fields marked with a red asterisk are required. Read-only fields are gray.

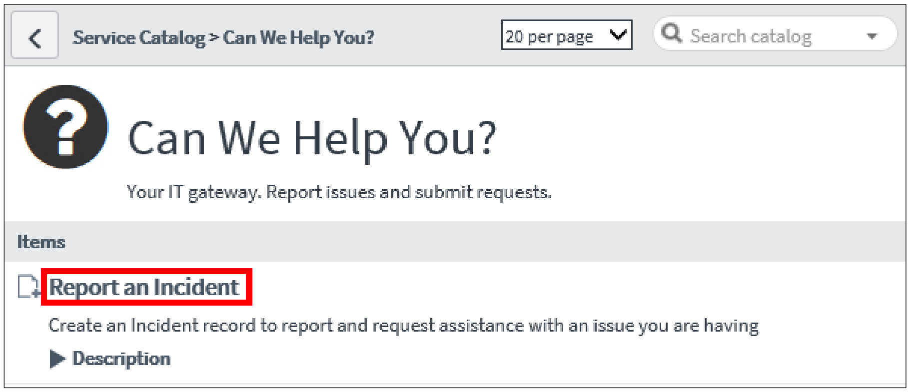

Figure 9 – Can We Help You Page

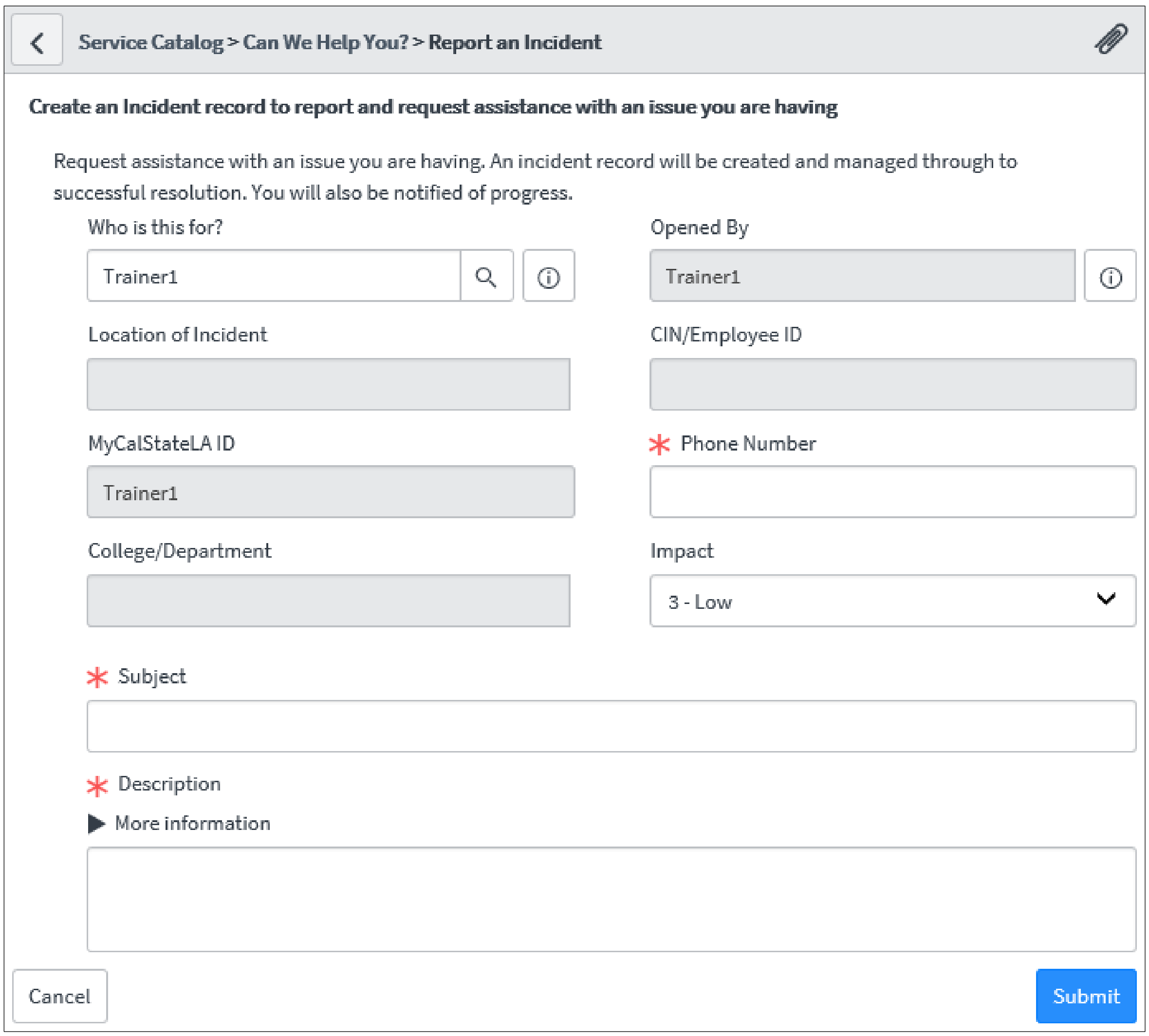

Figure 10 – Report an Incident Form

4. In the **Who is this for** field, enter the name of the user who is affected by the incident.

   NOTE: The **Who is this for** field is automatically filled with your name. If you are reporting an incident on behalf of someone else, enter their name so they can be contacted directly. You can start typing the user's name, username, or CIN to display a list of matching users, and then select the appropriate user from the list. Once you select a user, one or more fields of the form will autofill with the user's information.

5. In the **Phone Number** field, enter your preferred contact number.
6. From the **Impact** drop-down list, select the level of impact (**1 - High**, **2 - Medium**, or **3 - Low**) based on the number of users that are affected. The more users affected, the higher the impact.
7. In the **Subject** field, enter a brief description of the incident.
8. In the **Description** field, enter a detailed description of the incident. You should include information such as what device or system you are using, when and where the issue occurred, and if anything has been done to resolve the issue.
9. To add an attachment (such as a screenshot of the error), click the **Attachment** icon on the form's title bar to open the **Attachments** pop-up window, select the file that you want to attach, and then click the **Close** button . The attachment appears at the top of the form.
10. When finished, click the **Submit** button. A confirmation message displays in the **Content** frame and an email notification is sent to you to confirm that the ticket has been submitted.

Requesting Services

ServiceNow includes a service catalog that enables you to request IT services and products. Catalog items are grouped into categories and subcategories to help you quickly find the items you need.

To request a service:

1. On the **Applications** tab of the **Navigation** bar, under **Self-Service**, click **Service Catalog** (see Figure 11).

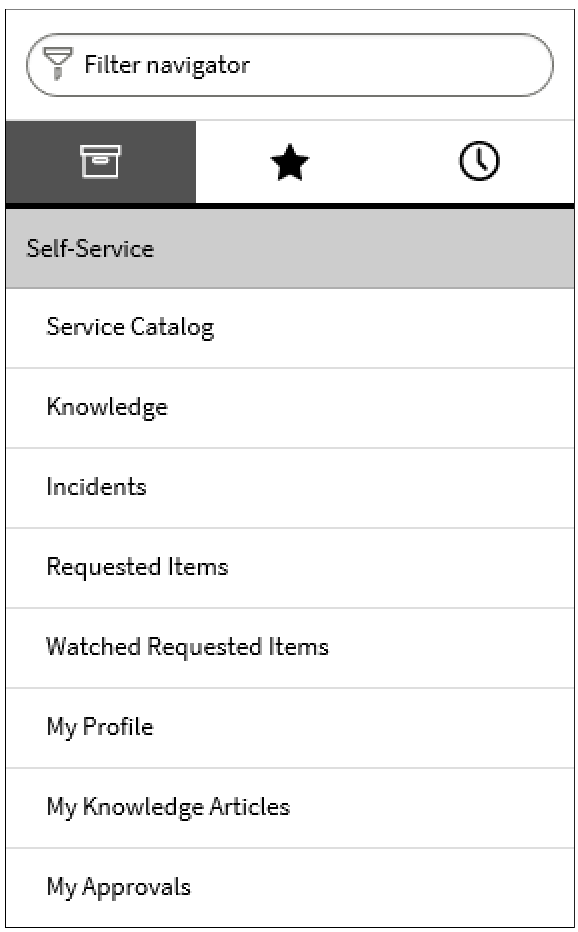

Figure 11 – Applications Tab of the Navigation Bar

2. The **Service Catalog** homepage opens in the **Content** frame (see Figure 12). Click the desired category (e.g., **Multimedia Services**), and then click the item that you want to request (e.g., **Media Production Request Form**).

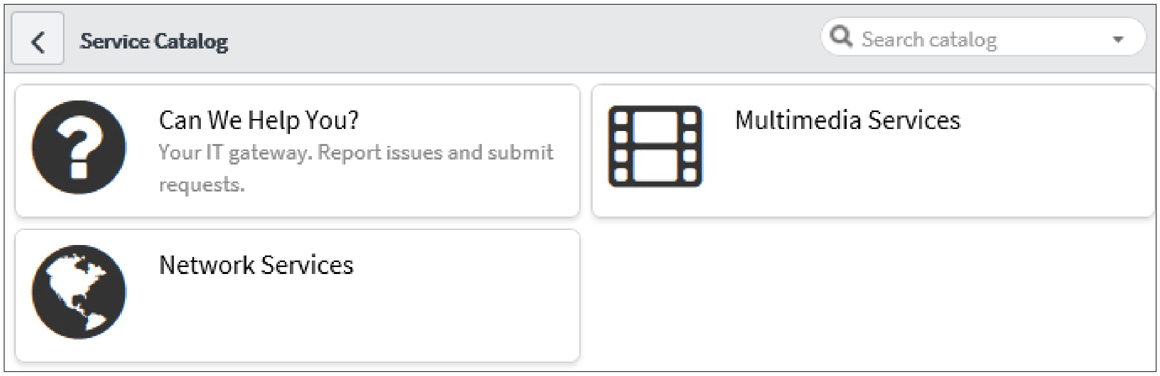

Figure 12 – Service Catalog Homepage

3. The **Service Catalog** request form for the selected item opens in the **Content** frame (see Figure 13). Fill in all relevant fields.

   NOTE: Fields marked with a red asterisk are required. Read-only fields are gray.

4. To add an attachment, click the **Attachment** icon on the form's title bar to open the **Attachments** pop-up window, select the file that you want to attach, and then click the **Close** button . The attachment appears at the top of the form.
5. When finished, click the **Submit Request** button. A confirmation message displays in the **Content** frame and an email notification is sent to you to confirm that the request has been submitted.

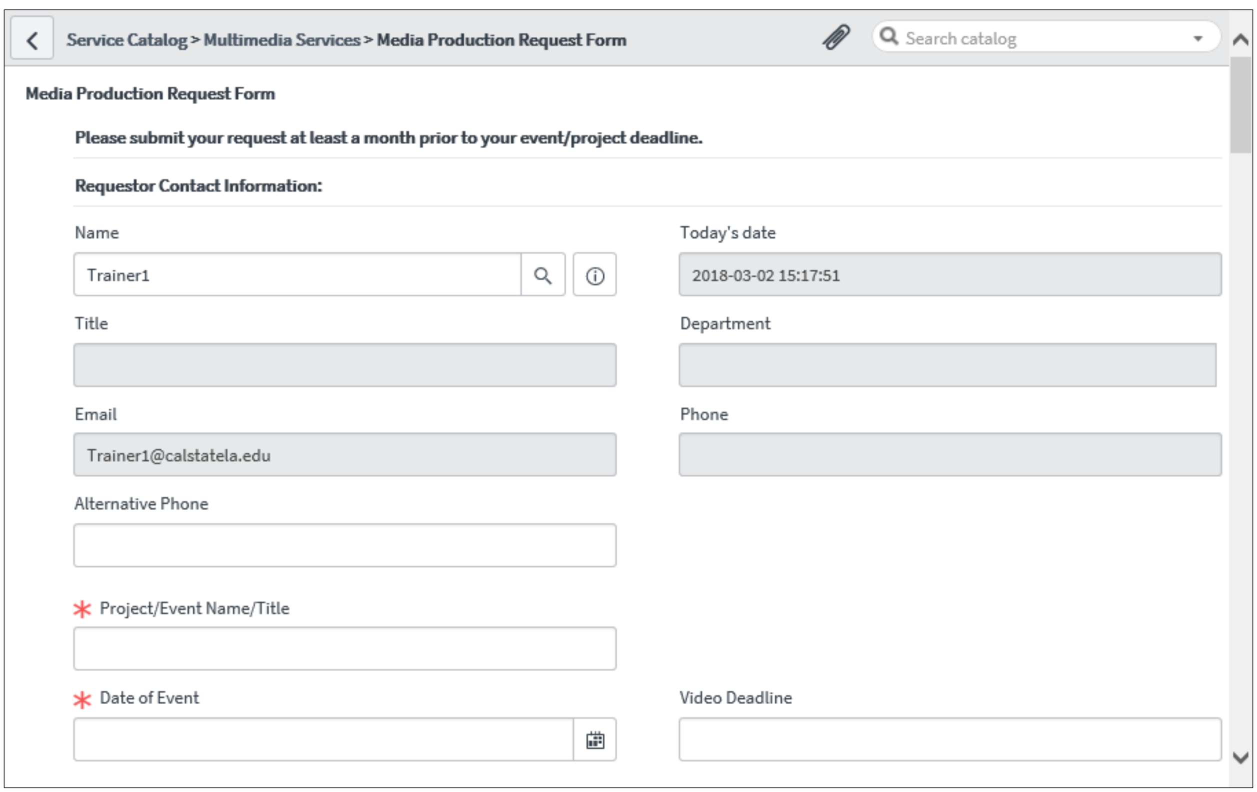

Figure 13 – Service Catalog Request Form

Checking the Status of Tickets

ServiceNow automatically emails status updates so you can easily track the status of your incident tickets and service requests. You can also check to status of your tickets using the ServiceNow system.

To check the status of an incident ticket:

1. If necessary, click the **Cal State LA** logo in the **Banner** frame to display the **Self Service** homepage. The **My Open Incidents** section displays a list of your incident tickets (see Figure 14).
2. To open a ticket and view its details, click the link in the **Category** column and review the **Activity** log for information and work completed on the ticket.

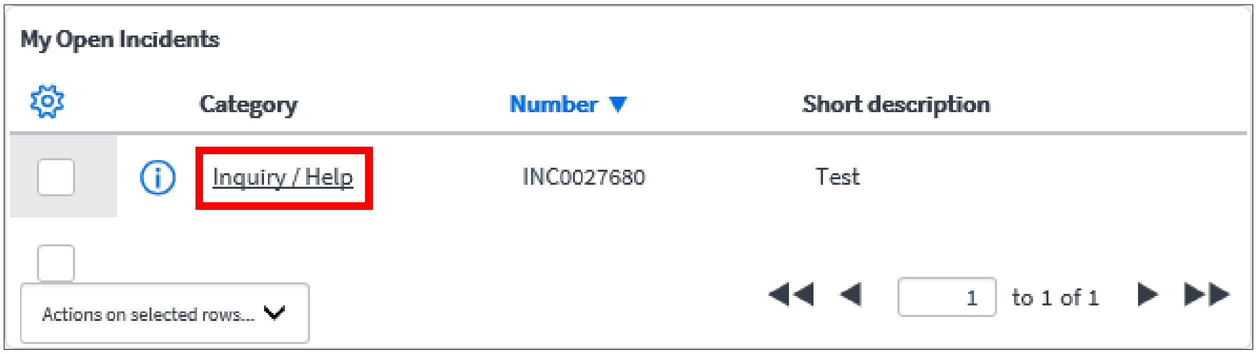

Figure 14 – My Open Incidents Section of the Self Service Homepage

NOTE: You can display a list of all your incident tickets by clicking **Incidents** on the **Applications** tab of the **Navigation** bar (see Figure 11).

To check the status of a request:

1. If necessary, click the **Cal State LA** logo in the **Banner** frame to display the **Self Service** homepage. The **My Requested Items** section displays a list of your requested items (see Figure 15).
2. To see the status of a specific request, click the arrow in the **Stage** column to expand it.
3. To open a request and view its details, click the request number in the **Number** column.

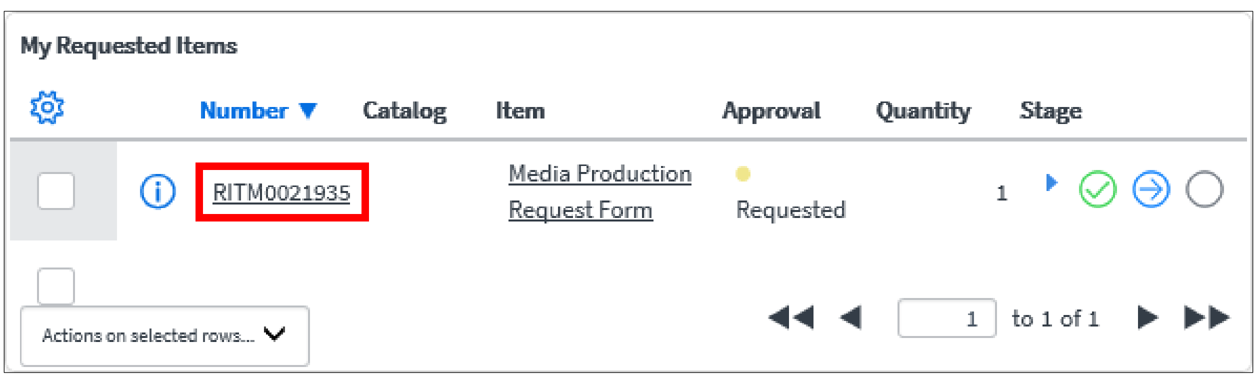

Figure 15 – My Requested Items Section of the Self Service Homepage

NOTE: You can display a list of all your requested items by clicking **Requested Items** on the **Applications** tab of the **Navigation** bar (see Figure 11).

Approving or Rejecting Requests

If a Service Catalog item requires your approval before it can be fulfilled, you will be notified via email that you have an item to approve. You can approve or reject a requested item via email or the ServiceNow system.

To approve or reject a requested item via email:

1. In **Outlook**, open the email notification for the item that requires your approval.
2. In the **Comments** section, click the **Approve** or **Reject** link.

To approve or reject a requested item via ServiceNow:

1. On the **Applications** tab of the **Navigation** bar, under **Self-Service**, click **My Approvals** (see Figure 11).
2. The **Approvals** list opens in the **Content** frame. Locate the item that you want to approve, and then click the **Requested** link in the **State** column (see Figure 16).

Figure 16 – Approvals List

3. The **Approval** form opens in the **Content** frame. Review the request, and then click the **Approve** or **Reject** button on the form's title bar or at the bottom of the form (see Figure 17).

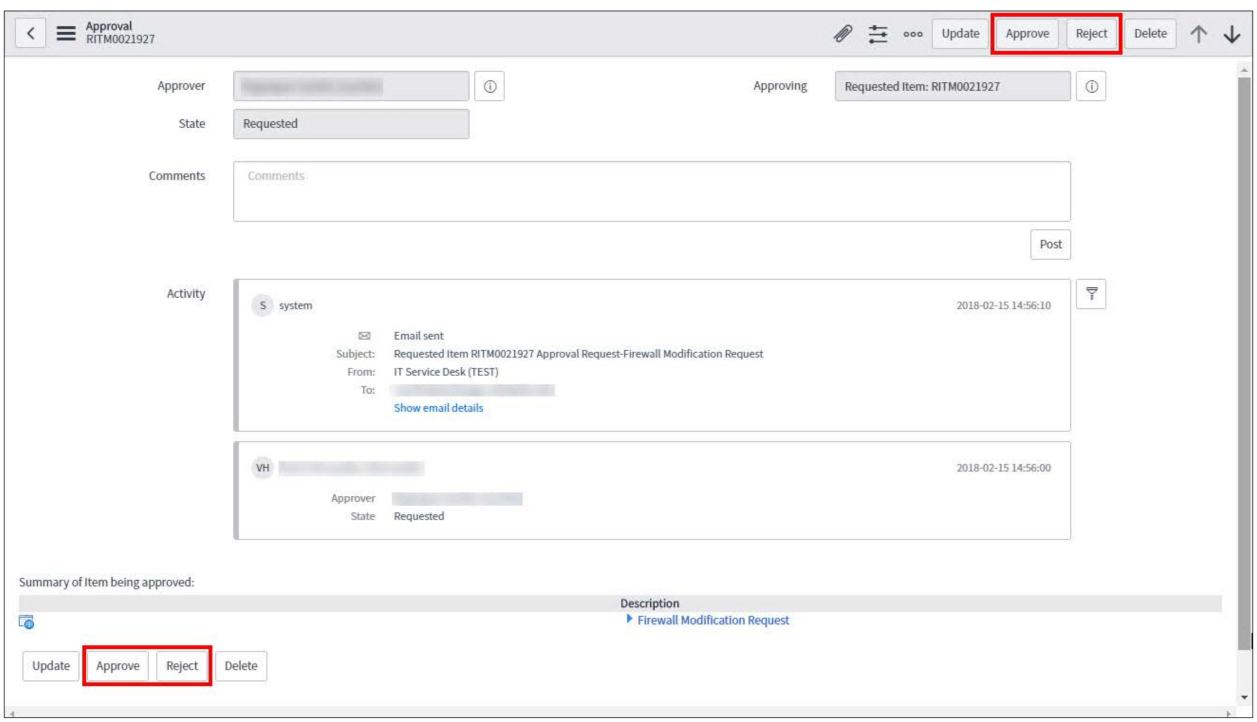

Figure 17 – Approval Form

Delegating Approvals to Another User

If you will be out of the office for an extended period of time, you can delegate your responsibilities to another user to ensure that ServiceNow approval requests are processed.

To delegate approvals to another user:

1. On the **Applications** tab of the **Navigation** bar, under **Self-Service**, click **My Profile** (see Figure 11).
2. Your profile page opens in the **Content** frame. On the **Delegates** tab, click the **New** button (see Figure 18).

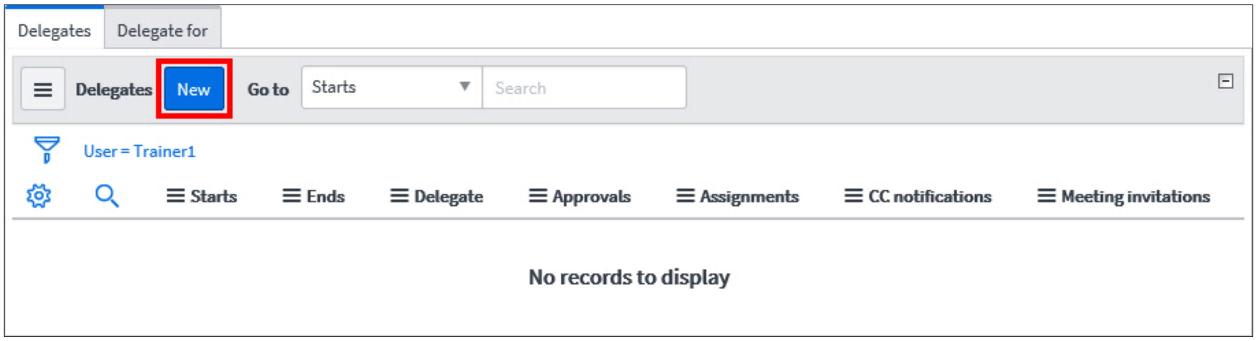

Figure 18 – Delegates Tab on the Profile Page

3. The **Delegate** form opens in the **Content** frame (see Figure 19). In the **Delegate** field, enter the name of the delegate. Or, click the **Lookup** icon on the right side of the field and select a user from the list.
4. In the **Starts** and **Ends** fields, enter the start and end dates and times.
5. On the right side of the form, select the check box for the type of responsibility that you want to delegate.
    - **Approvals** allows the delegate to approve items on your behalf.
    - **Assignments** allows the delegate to view and work on tasks assigned to you.
    - **CC notifications** copies the delegate on email notifications sent to you, except those marked Meeting Invitation.
    - **Meeting invitations** copies the delegate on email notifications sent of the type Meeting Invitation.
6. Click the **Submit** button.

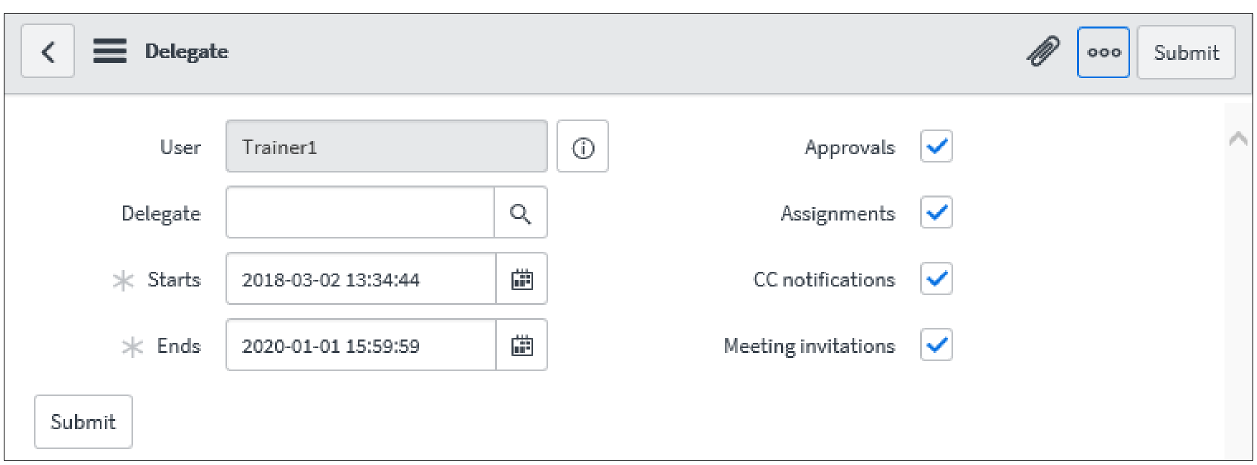

Figure 19 – Delegate Form

Searching the Knowledge Base

ServiceNow includes a knowledge base that can be used to find information or solutions to problems. The **Knowledge** homepage displays knowledge articles organized by category. You can search for a specific article by using the **Search** box in the upper-left corner of the homepage.

To search the knowledge base:

1. On the **Applications** tab of the **Navigation** bar, under **Self-Service**, click **Knowledge** (see Figure 11).
2. The **Knowledge** homepage opens in the **Content** frame (see Figure 20). Enter one or more keywords in the **Search** box, and then press the **Enter** key.
3. The search results display in the **Content** frame. Click an article to open it.

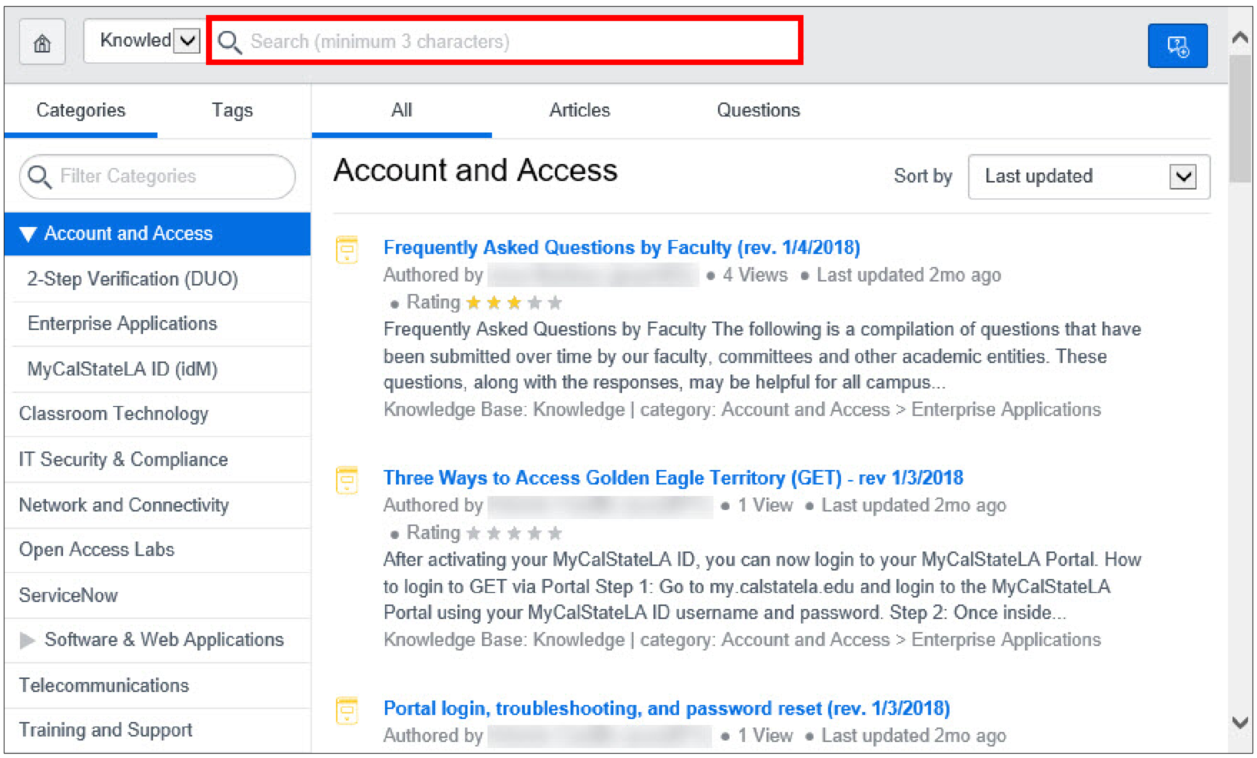

Figure 20 – Knowledge Homepage

NOTE: You can also use the **Knowledge Search** section of the **Self Service** homepage to search the knowledge base (see Figure 21).

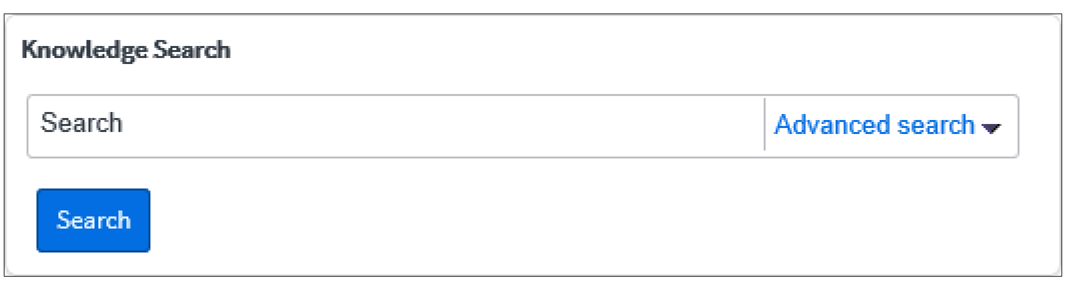

Figure 21 – Knowledge Search Section of the Self Service Homepage

Getting Help

ServiceNow includes a contextual help feature that can be used to get assistance on any topic or task.

To get help:

1. In the **Banner** frame, click the **Help** icon . The **Help** sidebar opens on the right side of the user interface (see Figure 22).
2. Click the **Search Documentation** link. The official **ServiceNow Product Documentation** website opens in a new tab.
3. Click any link to display the corresponding information or use the **Search** box in the upper-right corner of the page to search for a specific topic.

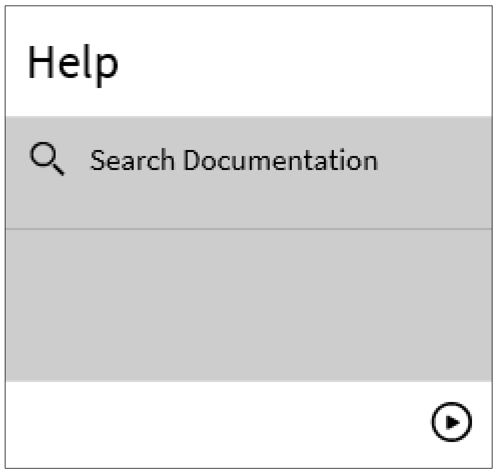

Figure 22 – Help Sidebar

Logging Out

Logging out prevents others from accessing your account. When you have finished using ServiceNow, you should log out of the system and close the web browser window.

NOTE: For security reasons, your session will time out after four hours of inactivity.

To log out of ServiceNow:

1. In the **Banner** frame, click the **User** menu, and then click **Logout** (see Figure 23).
2. Close the web browser window.

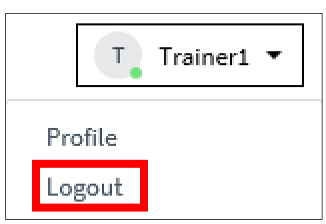

Figure 23 – User Menu