Introduction to Service-Now
Overview of the ARC/PAC Service Desk and Service-Now

With almost 15,000 full-time employees, Columbia University must have a way to manage and track questions and challenges from employees and vendors. The ARC/PAC Service Desk is designed to be a single point of contact for the needs of its community users and vendors and to support all departments of Columbia University in an efficient and effective way. The ARC/PAC Service Desk will act as a "one-stop-shop" for all of Columbia University's community user-base to receive answers to inquiries related to Finance, Human Resources, Payroll Data, Tax, etc. The Service Desk will use enabling technologies to meet its goals and standards, and above all, improve processes. One of the primary technologies the ARC/PAC Service Desk will be introducing is Service-Now.

Service-Now is a web-based tool on the Employee Self Service (ESS) portal in which users can log requests or incidents. These requests will then be solved and monitored by Service Desk employees to ensure that employee questions and problems are responded to in an efficient and effective manner. This Job Aid will act as an introduction to Service-Now and explain how to utilize the tool to best suit your needs.

Purpose

Service-Now is a web-based tool in which employees in the Finance and Human Resources departments can log service requests and/or incidents. The requests will then be routed to the appropriate service desk staff and managed appropriately. The primary purpose of the tool is to provide an easy-access self-service tool in which users can request and receive assistance in a timely, consistent, and accurate manner.
Scope
Service-Now primarily serves employees in the Finance and Human Resources/Labor Accounting functional areas. The primary customers within these functional areas fall into these categories:

<table>
<thead>
<tr>
<th>Finance</th>
<th>Human Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Accounts Payable</td>
<td>• Employment</td>
</tr>
<tr>
<td>• Payroll</td>
<td>• Human Resources Information System (HRIS)</td>
</tr>
<tr>
<td>• General Accounting</td>
<td>• Management Training</td>
</tr>
<tr>
<td>• Fixed Asset</td>
<td>• Compensation</td>
</tr>
<tr>
<td>• Project Accounting</td>
<td></td>
</tr>
</tbody>
</table>

The scope of typical inquiries in Service-Now include:

- General inquiries related to Finance and Human Resources
- Status of a request or transaction in ARC
- Confirmation of receipt of a form
- General inquiries related to ARC/PAC notifications or functionality

For a complete list of frequently inquiries, please reference the Appendix at the end of this document.
Service-Now Functionalities
Within Service-Now, multiple actions are possible. The primary actions that are performed in Service-Now are logging incidents and service requests.

What is an Incident?
An incident should be logged when there is a question or problem, such as a disruption in proper functioning of a service or something preventing you from being able to complete your work.

Examples of incidents are below:

- How do I enter a requisition?
- I clicked the View Documents button in ARC and get an error message
- I ran a report in ARC, but the sub-total is incorrect

Once an incident is logged, a member of the Service Desk staff will resolve the issue and send follow-up notifications as appropriate. The incident resolution process is below as well as the notifications users will receive throughout the incident lifecycle:
What is a Service Request?
A service request is created within the Service-Now tool by identifying pre-defined services from a "Service Catalog". Service requests are a way to request action from a certain Business Group or a member of the Service Desk staff. Available service requests in the Service Catalog include:

**Procurement Requests**
- Copy of a Check
- Sop Payment

**Human Resources/Payroll Requests**
- Overpayment Recovery
- PAC Stop Payment
- Pay Error/Correction

**Labor Accounting Requests**
- Cost Transfer
- Salary Distribution & Additional Compensation

Once submitted, users will be able to track the status of their request in the Service-Now tool. Below, you can find the resolution process as well as notifications you will receive throughout the service request lifecycle:
Service-Now Status Overview

Incidents and Service Requests can be in multiple statuses depending on where they are in the resolution life cycle. The following table outlines the different possible statuses for Incidents:

<table>
<thead>
<tr>
<th>Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>The Incident has been created</td>
</tr>
<tr>
<td>Active</td>
<td>The Incident is currently being worked on</td>
</tr>
<tr>
<td>Awaiting Vendor Information</td>
<td>Awaiting Vendor information that will help resolve Incident</td>
</tr>
<tr>
<td>Awaiting User Information</td>
<td>Awaiting User information that will help resolve Incident</td>
</tr>
<tr>
<td>Awaiting Documentation</td>
<td>Awaiting Documentation that will help resolve Incident</td>
</tr>
<tr>
<td>Resolved</td>
<td>Incident has been resolved</td>
</tr>
<tr>
<td>Negotiated Resolution Timeframe</td>
<td>The timeline on the Incident has been negotiated and all relevant parties have been informed of the new timeframe</td>
</tr>
</tbody>
</table>

The following table outlines the different Service Request statuses:

<table>
<thead>
<tr>
<th>Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>The Service Request has been created</td>
</tr>
<tr>
<td>Work in Progress</td>
<td>The Service Request has been assigned to the relevant individual/group and is being worked on</td>
</tr>
<tr>
<td>Closed – Incomplete</td>
<td>The Service Request was worked on but not completed because additional action is necessary</td>
</tr>
<tr>
<td>Closed – Complete</td>
<td>The Service Request was fulfilled successfully</td>
</tr>
</tbody>
</table>
Login to Service-Now

There are multiple ways to login to the Service-Now tool. There will be links to the Service-Now tool on the Finance and HR Portals. After clicking the link, you will be prompted to login with your Uni and Password.

In addition, you can access the tool directly at the following link:

https://columbia.service-now.com
Service-Now Home Screen Overview

When you first login to Service-Now, you will see the Home Screen below. We will now outline the different components of the Home Screen.

1. **Self-Service Menu** -- This is where you will initiate new Service Requests (clicking "Service Catalog") and new Incidents (clicking "Create New Incident"). In addition, you can monitor/track existing Incidents and Service Requests and manage your profile information.

2. **News** – The News section on the home page will contain upcoming system outages and other news that affects Service-Now users.

3. **Get Help** – This section contains direct links to create a new Incident

4. **Get Services** – This section contains direct links to create a Service Request from the Service Catalog.

5. **Quick Links** – The Quick Links section provides direct access to a Homepage Introduction, the Finance Gateway, and the My Columbia Portal for you to reference while logging Incidents and/or Service Requests

6. **My Open Incidents & My Requested Items** -- In the "My Open Incidents" and "My Requested Items" section you can monitor the status of any open Incidents or Service Requests you may have logged. All of your existing Incidents and Service Requests will appear in this section of the Home Page. This will be the primary way to track your requests to ensure they are closed in a timely manner.

7. **Logout** – In order to logout of the Service-Now tool, click the Logout button at the top of your screen.
Creating a New Incident

1. Login to Service-Now, and select the “Create a New Incident” button from the Self-Service Menu or under the “Get Help” menu.

2. You will then select the type of Incident you are submitted (CUIT, Finance/ARC, or HR/PAC) and click “Next”
3. The Incident Entry Screen is displayed.

![Incident Entry Screen]

The Incident Entry Screen is displayed.
4. You will then complete the first party of the Incident Entry screen. The fields with the yellow bar next to them are pre-populated, and you do not need to edit them. For a detail of what the different fields mean, see below:

1. **User**: This is where you can enter the Uni of the User requesting the incident
2. **Preferred Contact Method**: A drop down menu where you can select your preferred method of contact
3. **Service Location**: Where are you logging into the system. You can use the magnifying glass to select from the list of available options
4. You can then complete the second half of incident form

1. **Category:** Select an option from the drop-down menu that indicates the overall category the incident falls under (see appendix for a full list)
   **Subcategory:** Options will vary based on your selection in the Category field. Subcategory further specifies the category the incident falls under (see appendix for a full list of options)
2. **Type:** Within the category and subcategory, Type indicates what general functional area the incident falls under (see appendix for a full list of options)
   **Sub-Type:** Within Type, further specifies the type of incident you are logging (see appendix for full list of options)
3. **Related Information 1 and 2:** Provides identifiers to help the Service Desk Analysts locate the incident you are referring to. You will select the type of related information and then enter the specifics. For example, you could select Voucher ID and in the following field, you would enter the exact Voucher ID you are referring to (see appendix for a full list of options)
5. In the Description Field, you can enter a detailed Description of your question/problem. This is the primary way to communicate with the Service Desk Analysts, who will read your message and be able to communicate back with you via this page. **Note: DO NOT** enter any identifying/sensitive information in this field.

6. Once all the Incident Fields are complete, press the Update button.
7. Once you press the Update Button, your detailed description of the incident will appear in the “Activity” section of the screen. Service Desk Analysts can update this section as well, and you can see their messages when you access this Incident in the future.

8. When you access the homepage after submitting your Incident, you can see that it appears in the “My open Incidents” section of the homepage so that you can track/monitor the progress of your Incident.
Monitoring Existing Incidents

1. Click the “Incidents” button under the Self-Service menu on the Home Page.

2. Existing Incidents will appear. If there is a long list of existing incidents, you can use the search feature at the top of the screen to filter the Incidents by number, opened date, short description, and/or incident state.
3. You can also customize the Incidents that appear by checking the box that corresponds with a certain Incident and selecting an action on selected rows (such as deleting or moving the Incident).

4. You can continue to customize the view on screen by clicking the Incidents button at the top of the screen and selecting appropriate options.
5. Lastly, you can export the existing Incidents to an Excel, CSV, and/or PDF by right clicking anywhere on the screen and selecting the Export button.
Creating a Service Request

1. To Create a Service Request, select the “Service Catalog” button the Self Service Menu on the homepage

2. The Service Catalog will appear and you can select one of the available Service Requests. In this example, we will select the “Copy of a Check” option.
3. The fields that appear on the following page will vary based on the type of Service Request you select.

4. Complete the fields on the Service Request form (fields will vary based on Service Request). Fields are both editable and drop down menus; you can also provide additional instructions at the end of every Service Request. Once you have completed the form, click the “Order Now” button in the top right corner of the screen.
5. Once you Order the Service Request, a confirmation screen will appear with a Request Number and details of the Service Request.

6. From the Confirmation Screen, you can navigate back to the Home Screen and see that your Service Request appears in the “My Requested Items” section of the screen.
Monitoring Existing Service Requests

1. Click the “My Service Requests” button from the Self-Service menu on the Home Page

2. Similar to the “My Incidents” page, you can search for, delete, and filter results within the list of Service Requests by using the Search field and the drop down menu under the list of Service Requests.
3. Group results by clicking the “Requested Items” button.

4. Similar to the “My Incidents” page, you can also export the list of Service Requests by right clicking on the screen and selecting “Export”.