ServiceNow: User Guide
Spring 2017, Version 1.1

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Introduction

ServiceNow is an online ticketing system that allows Cal State LA users to report IT issues and request services. The system automatically emails status updates so users can track the status of a service request or ticket 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 a request, search the knowledge base, and get help.

Logging In

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

To log in to ServiceNow:
1. Launch a web browser and visit the ServiceNow login page (see Figure 1).
2. Enter your myCSULA Identity username and password in the corresponding fields, and then click the Login button.

![ServiceNow Login Page](image1.png)

Figure 1 – ServiceNow Login Page

NOTE: You can quickly navigate to the ServiceNow login page from any page within the Information Technology Services website by clicking Quick Links on the horizontal menu, and then clicking ServiceNow (see Figure 2).

![Horizontal Menu of the Information Technology Services Website](image2.png)

Figure 2 – Horizontal Menu of the Information Technology Services Website

User Interface Overview

The ServiceNow user interface is divided into the following four areas (see Figure 3).
1. The Banner pane contains global navigation controls and tools.
2. The Edge toolbar provides quick access to commonly used features and pages.
3. The Navigator pane provides access to all available applications and modules.
4. The Content pane displays lists, forms, or homepages.
Figure 3 – ServiceNow User Interface

Banner Pane

The Banner pane is located at the top of the user interface and contains the following global navigation controls and tools (see Figure 4).

1. The Welcome message shows your name and provides a link to your profile.
2. The Collapse/Expand Banner icon changes the amount of space the Banner pane occupies.
3. The Settings icon displays the Settings menu which allows you to set your preferences.
4. The Logout button logs you out of the system and returns to the login page.

Figure 4 – Banner Pane

Edge Toolbar

The Edge toolbar is located on the left side of the user interface and provides quick access to commonly used features and pages (see Figure 5). By default, the toolbar includes the following five buttons.

1. The Toggle Navigator button shows or hides the Navigator pane.
2. The List and Form View button splits the Content pane into two panes, a List pane and a Form pane.
3. The Tagged Documents button displays the Tagged Documents page.
4. The All Bookmarks button provides a list of all bookmarks on the Edge toolbar.
5. The Home button displays your homepage in the Content pane.
Navigator Pane

The Navigator pane is located on the right side of the Edge toolbar and provides access to the Self-Service application and its modules (see Figure 6).

1. An application is a group of modules that provide related information and functionality. You can collapse or expand an application by clicking its label.

2. All modules that an application contains are listed below the application label. Clicking a module opens it in the Content pane.

3. Each module has a Star icon to the left of its name that can be selected or deselected. You can mark a frequently used module as a favorite by clicking its Star icon. Clicking the Favorites icon at the top of the Navigator pane toggles between showing only the favorite modules and showing all modules.

4. You can use the Filter box at the top of the Navigator pane to quickly find an application or a module. As you enter text, the pane shows only matching applications and modules.
Content Pane

The Content pane is located on the right side of the Navigator pane and displays lists, forms, or homepages. When you log in to ServiceNow, the Self Service homepage appears in the Content pane (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 pane.
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 on the right side of the homepage title is used to refresh the page. You can also use the drop-down list next to the icon to specify a refresh time of 5, 15, 30, or 60 minutes. The default is Off (no refresh).

![Figure 7 – Self Service Homepage in the Content Pane](image)

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 Home button on the Edge toolbar to display the Self Service homepage.
2. Click the Can We Help You link on the homepage, and then click Report an Incident (see Figure 8).

![Figure 8 – Can We Help You Section of the Self Service Homepage](image)
3. The Report an Incident form opens in the Content pane (see Figure 9). In the Phone Number field, enter your preferred contact number.

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

4. Under Impact, select the level of impact (3 - Low, 2 - Medium, or 1 - High) based on the number of users that are affected. The more users affected, the higher the impact.

5. In the Subject field, enter a brief description of the incident.

6. 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.

7. 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 dialog box, select the file that you want to attach, click the Attach button, and then click the Close button. The attachment appears at the top of the form.

8. When finished, click the Submit button. A confirmation message displays in the Content pane, and an email notification is sent to you to confirm that the ticket has been submitted.

![Figure 9 – Report an Incident Form in the Content Pane](image-url)
Requesting Services

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

To request a service:

1. In the Navigator pane, under Self-Service, click Service Catalog (see Figure 10).

![Service Catalog Module in the Navigator Pane](image)

2. The Service Catalog homepage opens in the Content pane (see Figure 11). Verify that your name is entered in the Request for field.

   NOTE: If you are requesting the item on behalf of someone else, fill in their name in the Request for field so they can be contacted directly.

3. Click the desired category, and then click the item that you want to request.

![Service Catalog Homepage in the Content Pane](image)

4. The Service Catalog request form for the selected item opens in the Content pane (see Figure 12). Fill in all relevant fields.
NOTE: Fields marked with a red asterisk are required. Fields marked with a gray asterisk are recommended, but are not required. Read-only fields are gray.

5. To add an attachment, click the Attachment icon on the form’s title bar to open the Attachments dialog box, select the file that you want to attach, click the Attach button, and then click the Close button. The attachment appears at the top of the form.

6. When finished, click the Submit Request button. A confirmation message displays in the Content pane, and an email notification is sent to you to confirm that the request has been submitted.

![Service Catalog Request Form in the Content Pane](image1)

Figure 12 – Service Catalog Request Form in the Content Pane

**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 a ticket:**

1. If necessary, click the Home button on the Edge toolbar to display the Self Service homepage. The My Open Incidents section displays a list of your incident tickets (see Figure 13).

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.

![My Open Incidents Section of the Self Service Homepage](image2)

Figure 13 – My Open Incidents Section of the Self Service Homepage

NOTE: You can display a list of all your incident tickets by clicking Incidents in the Navigator pane (see Figure 14).
To check the status of a request:

1. If necessary, click the Home button on the Edge toolbar 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.

NOTE: You can display a list of all your requested items by clicking Requested Items in the Navigator pane (see Figure 16).
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 ServiceNow.

To approve or reject a requested item via email:
1. In Outlook, open the email notification for the item that requires your approval.
2. Click the Approve or Reject link.
3. Click the Send button.

To approve or reject a requested item via ServiceNow:
1. In the Navigator pane, under Self-Service, click My Approvals (see Figure 17).

![Figure 17 – My Approvals Module in the Navigator Pane](image)

2. The Approvals list opens in the Content pane. Locate the item that you want to approve, and then click the link in the State column (see Figure 18).

![Figure 18 – Approvals List in the Content Pane](image)

3. The Approval form opens in the Content pane. Review the request, and then click the Approve or Reject button on the form’s title bar (see Figure 19).
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. In the **Navigator** pane, under **Self-Service**, click **My Profile** (see Figure 20).

2. Your profile page opens in the **Content** pane. On the **Delegates** tab, click the **New** button (see Figure 21).
3. The **Delegate** form opens in the **Content** pane (see Figure 22). 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.

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

4. In the **Starts** and **Ends** fields, set the period of time for the delegation.

5. On the right side of the form, select the check box for the type of responsibility that you want to delegate.
   - The **Approvals** option allows the delegate to approve items on your behalf.
   - The **Assignments** option allows the delegate to view and work on tasks assigned to you.
   - The **CC notifications** option copies the delegate on email notifications sent to you, except those marked Meeting Invitation.
   - The **Meeting invitations** option copies the delegate on email notifications sent of the type Meeting Invitation.

6. Click the **Submit** button.

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**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 at the top of the homepage.

**To search the knowledge base:**

1. In the **Navigator** pane, under **Self-Service**, click **Knowledge** (see Figure 23).
2. The **Knowledge** homepage opens in the **Content** pane. Enter one or more keywords in the **Search** box, and then press the **Enter** key (see Figure 24).
3. The search results display in the **Content** pane. Click an article to open it.

**NOTE**: You can also use the **Knowledge Search** section of the **Self Service** homepage to search the knowledge base (see Figure 25).
Getting Help

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

To get help:
1. Click the **Settings** icon on the right side of the **Banner** pane, and then click the **Help** icon at the top of the **Settings** menu (see Figure 26). The ServiceNow Wiki website opens in a new tab.
2. 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 26 – Help Icon on the Settings Menu](image)

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. Click the **Logout** button in the **Banner** pane (see Figure 27).
2. Close the web browser window.

![Figure 27 – Logout Button in the Banner Pane](image)