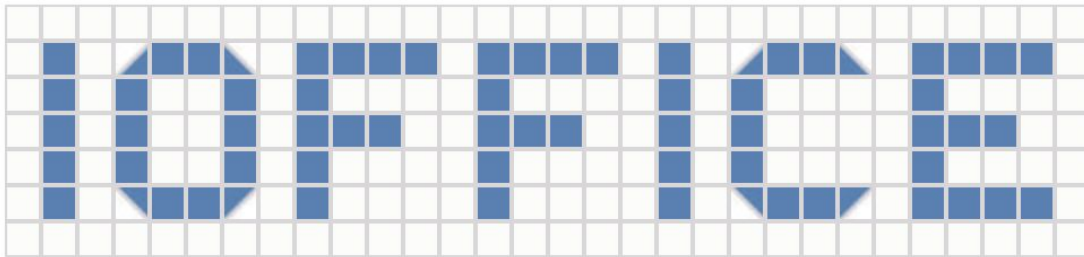


March 25, 2019

Service Request-ServiceNow

Provide a brief overview and any other requirements/notes needed.



Overview

A significant subset of iOFFICE clients prefer servicing certain types of tickets within a 3rd party IT incident management system called ServiceNow. These customers want their users to continue submitting these tickets within iOFFICE, but make them available to operators within ServiceNow automatically. Currently, we have a few customers with their own custom implementations that create ServiceNow incidents by relying on iOFFICE SR submission emails, but this can be very brittle and a burden on our clients to maintain. For customers who haven't tied the two systems yet: the prospect of building their own integration via our V2 API/Webhooks + their own possible middleware tooling also isn't as appealing because it is a resource-heavy option. Thus, the ***Service Request to ServiceNow Connector*** provides a stable, lightweight, & out of the box integration to automatically create these ServiceNow incidents for their IT staff to manage. A few highlights of this first version:

1. Tickets in both systems are ***not*** kept in sync bidirectionally, only:
 - a. Create iOFFICE ticket ⇒ Create ServiceNow ticket.
 - b. Close ServiceNow ticket ⇒ Archive iOFFICE ticket.
 2. Updates to either ticket system is not instantaneous
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- a. 1 minute polling- must wait to see create and archive events reflected in each system. *(This can change, but 1 minute is the minimum time a scheduled trigger can execute)*
 - b. This polling will be replaced with event-based triggers so changes in the system will appear quicker in the near future.
3. Any client-facing errors will display in the iOFFICE Service Request ticket's comments field.
4. iOFFICE ticket details carried over to ServiceNow are kept to a minimum:

iOFFICE (service request)	ServiceNow (incident)
Requester <i>(first and last name)</i>	Caller
SubCategory <i>(name)</i>	Category
Request Type <i>(name)</i>	Subcategory
Nothing displayed on iOFFICE side <i>(text generated under the hood purely for ServiceNow)</i>	Short Description <i>(Text: "iOFFICE Service Request <ticket id>")</i>
First comment upon creation of ticket	Description
Reference Number	Number
Request Id	iOFFICE Service Request ID <i>(field displayed in custom iOFFICE tab)</i>
Nothing displayed on iOFFICE side <i>(Under the hood, we set ServiceNow ticket status to "open" when an iOFFICE ticket is first created and "closed" when we archive.)</i>	iOFFICE Service Request Status <i>(field displayed in custom iOFFICE tab- the values are either open or closed and are set upon ticket creation/archiving)</i>

Definitions/Key Terms

- **Middleware** - software that enables isolated systems or functionalities to interact. Tray.io is a SAAS-based middleware solution of choice for iOFFICE.
- **Connector** - A configured bridge between iOFFICE and another system to automate a specified workflow. Our connectors are enabled internally by iOFFICE staff with client.
- **iOFFICE Service Request Ticket**

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- *Request ID* - Numerical value unique within iOFFICE, which can be used to find a specific service request ticket
 - *Request Type* - third layer in a request catalog hierarchy (Category -> Subcategory -> Request Type)
 - *Requestor* - User who created the Service Request Ticket
 - *Operator* - user who will work on the ticket within ServiceNow (a configured ServiceNow default operator *automatically assigned to iOFFICE ticket if none are assigned when creating iOFFICE ticket*)
 - *Reference Number* - a field to hold the ServiceNow incident #. It is recommended to disable allowing requester from updating this field (preference to turn off)
 - *ServiceNow Incident* ([More information on ServiceNow Incidents](#))
 - *Number* - Numerical value unique to ServiceNow, equivalent to an iOFFICE Request ID.
 - *Subcategory* - equivalent to the iOFFICE Request Type. Second layer in a two part hierarchy of (Category -> Subcategory)
 - *State* - The state moves and tracks incidents through several stages of resolution. Default states are New, In Progress, On Hold, Resolved, Closed, Canceled. *Currently we do not manipulate theirs states with ours, except for New (create event) and Closed (archive event)*
 - *Caller* - Mandatory. Person who created the incident, equivalent to the iOFFICE Requestor.
 - *Short Description* - Mandatory. A short description of the incident created.

Prerequisites

1. ServiceNow account and a client's System Admin or anyone with access to it.
2. ServiceNow user credentials (to create incidents)
3. System admin iOFFICE user credentials (to update/close tickets)
4. ServiceNow Category/Subcategory that map to iOffice SubCategory/RequestType by name.
5. A ServiceNow user who will act as the default caller for linked ServiceNow incidents if iOFFICE requester does not exist in ServiceNow.
6. Default iOFFICE user who act as the default operator for linked iOFFICE tickets if one is not assigned at time of creation.
7. A list of iOFFICE Service Request Type IDs enabled for the ServiceNow connector.

8. Reference Number field in iOFFICE should be hidden to avoid breaking Service Now iOFFICE links. To hide the reference number field, go to Admin → Service Request → Preferences. Uncheck “Enable Reference Number”

Ticket Flow

1. Create IOffice Service Request Ticket for any request type.

The screenshot shows the 'Create A New Request' form. On the left is a vertical sidebar with icons for various functions. The main form area is divided into two columns. The left column contains three sections: 'Who/What Is This Service Request For?' with a green circle icon and the text 'Me'; 'Request Location' with the text 'Default: Houston Tower 2 — Floor 08 — 804B'; and 'Request Type' with a breadcrumb trail 'Service Now... > Service Now S... > Service Now Re...'. The right column contains three sections: 'Priority' with a 'One Time' toggle and a 'Recurring' toggle, and a horizontal bar with priority levels 'Really Really Slow', 'Super Urgent', 'Urgent*', 'High', 'Normal' (highlighted with a blue circle), 'Just Normal', and 'Low'; 'Date Required' with a date picker set to 'Apr 16, 2020 12:25 PM CDT' and a note 'Date required cannot be before 04/16/2020 12:25 PM CDT'; and 'Comments' with a text area containing 'Testing service request --> service now connector'.

2. Wait a minute, verify Service Now incident is created with relevant IOffice data (Caller, Category, Subcategory, Short Description, Description, iOFFICE tab)

The screenshot shows the iOFFICE incident details page. The top bar includes the iOFFICE logo, a search bar, and a user profile icon. The left sidebar contains a navigation menu with options like 'Self-Service', 'Incidents', 'Watched Incidents', 'Service Desk', 'Incident', 'Create New', 'Assigned to me', 'Open', 'Open - Unassigned', 'Resolved', 'All', 'Overview', 'Critical Incidents Map', and 'Administration'. The main content area shows the incident details for 'INC0010274'. It includes fields for 'Number', 'Caller' (Vernon Williams), 'Category' (Service Now Sub-Category), 'Subcategory' (Service Now Request Type), 'Service', 'Configuration item', 'Contact type' (None), 'State' (New), 'Impact' (3 - Low), 'Urgency' (3 - Low), 'Priority' (5 - Planning), 'Assignment group', and 'Assigned to'. The 'Short description' field contains 'iOFFICE Service Request 12295' and the 'Description' field contains 'Testing service request --> service now connector'. Below the incident details is a 'Related Search Results' section with tabs for 'iOFFICE', 'Notes', 'Related Records', and 'Resolution Information'. The 'iOFFICE' tab is active, showing fields for 'iOFFICE Service Request ID' (12295) and 'iOFFICE Service Request Status' (Open).

3. Verify iOffice Service Request ticket's comments indicate Service Now is linked, In Progress, and the default operator was assigned if none was assigned originally.

Service Request #12295

Dispatched Accepted In Progress

Request Information

Ticket Status	In Progress
Date Entered	Apr 16, 2020 10:55 AM CDT
Date Required	Apr 16, 2020 12:25 PM CDT
Started On	Apr 16, 2020 10:56 AM CDT
Category	Service Now Category
Sub-Category	Service Now Sub-Category
Request Type	Service Now Request Type
Priority	Normal

Comments

Service, Customer (04/16/2020 10:55 AM):
Testing service request --> service now connector

Dwyer, Andy (04/16/2020 10:56 AM):
Request linked to ServiceNow Incident INC0010274

Resolution

No Resolution

Assignments

Operators Needed: 1 Assign Another Operator

Ron Swanson In Progress

4. In Service Now, resolve and close the incident
5. Wait a minute, verify the iOFFICE Service Request ticket is archived.

Request Summary -- Houston Service Request

Request Details

Request Number: 12295	Product Category: Service Now Category
Reference Number: INC0010274	Product Description: Service Now Sub-Category
Status: Completed	Request Type: Service Now Request Type
Date/Time Submitted: 04/16/2020 10:55 AM	Date/Time Started: 04/16/2020 10:56 AM
Date/Time Required: 04/16/2020 12:25 PM	Date/Time Completed: 04/16/2020 11:58 AM
Priority: Normal	
Resolution: Andy Dwyer (Apr 16, 2020 11:58 AM CST) : Ticket closed from ServiceNow	

Requestor/Contact Information

Requestor Last Name: Service First Name: Customer Job Title: deed Email: jrodriguez@iofficecorp.com Space: 8048 Phone: 123-456-7777	Primary Contact Last Name: Service First Name: Customer Job Title: deed Email: jrodriguez@iofficecorp.com Space: 8048 Phone: 123-456-7777	Request Location Building: Houston Tower 2 Floor: 08 Space: 8048
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Technicians

Name	Phone	Email	Start Time	End Time	State
Ron Swanson		cyancey@iofficecorp.com	04/16/2020 10:56 AM	04/16/2020 11:58 AM	Completed

Comments

Details/Comments: Service, Customer (04/16/2020 10:55 AM):
Testing service request --> service now connector
Dwyer, Andy (04/16/2020 10:56 AM):

Configuration

1. **ServiceNow Configuration:** Add custom iOFFICE fields with column names *u_ioffice_maintenance_request_id* and *u_ioffice_maintenance_request_status* (open, closed) accessible for all ServiceNow incidents in the default view tied to iOFFICE requests.

Sample incident view with iOFFICE fields:

The screenshot shows a ServiceNow Incident record for INC0010248. The left sidebar contains navigation links for Incidents, Watched Incidents, Service Desk, and various filters. The main form displays incident details such as Number, Caller, Category, Subcategory, Service, Configuration item, Contact type, State, Impact, Urgency, Priority, Assignment group, and Assigned to. Below the main form, a custom iOFFICE tab is highlighted with a blue box and an arrow. This tab contains two fields: 'iOFFICE Service Request ID' with the value '1246' and 'iOFFICE Service Request Status' with the value 'Open'.

- a. Login to ServiceNow
- b. Navigate to the Dictionary by typing *Dictionary* in the search bar

The screenshot shows the ServiceNow Dictionary Entries page. The left sidebar contains navigation links for System Definition and Dictionary. The main area displays a table of dictionary entries. The table has columns for 'Column name' and 'Type'. Two entries are listed:

	Column name	Type
<input type="checkbox"/>	<i>incident</i>	<i>u_ioffice_maintenance_request_id</i> Integer
<input type="checkbox"/>	<i>incident</i>	<i>u_ioffice_maintenance_request_status</i> Choice

- c. Create new field entries. See screenshots for each and table reference below.
 - i. *u_ioffice_maintenance_request_id*

* Table	Incident [incident]	Application	Global
* Type	Integer	Active	<input checked="" type="checkbox"/>
* Column label	iOFFICE Service Request ID	Function field	<input type="checkbox"/>
* Column name	u_office_maintenance_request_id	Read only	<input type="checkbox"/>
		Mandatory	<input type="checkbox"/>
		Display	<input type="checkbox"/>

Choice List Specification Default Value

Displays a list of suggested values in a Choice list. In the Advanced view you can select the Choice table and the Choice field to take choice values from, plus a Dependent field.

Choice -- None --

Update Delete Column

Related Links

[Show Table](#)
[Advanced view](#)

Access Controls	Choices	Attributes (1)	Labels (1)
		Attributes	New Search Attribute Value
		Dictionary entry = iOFFICE Service Request ID	
		Attribute	Value
		Format	none

ii. *u_office_maintenance_request_status*

* Table	Incident [incident]	Application	Global
* Type	Choice	Active	<input checked="" type="checkbox"/>
* Column label	iOFFICE Service Request Status	Function field	<input type="checkbox"/>
* Column name	u_office_maintenance_request_status	Read only	<input type="checkbox"/>
		Mandatory	<input type="checkbox"/>
		Display	<input type="checkbox"/>

Choice List Specification Default Value

Displays a list of suggested values in a Choice list. In the Advanced view you can select the Choice table and the Choice field to take choice values from, plus a Dependent field.

Choice Dropdown with -- None --

Update Create Choice List Delete Column

Related Links

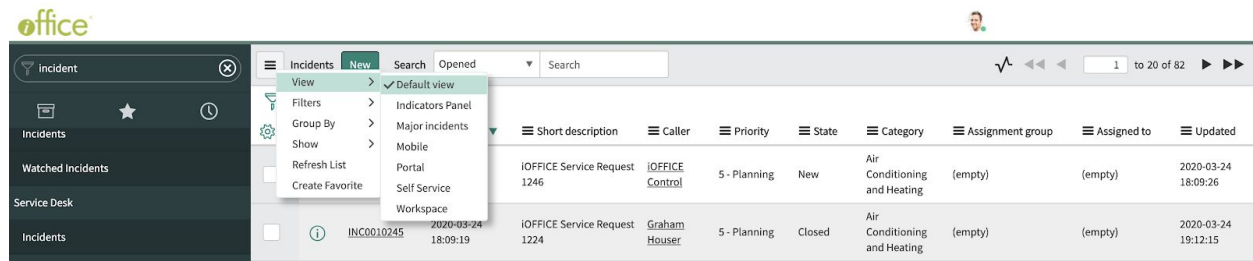
[Show Table](#)
[Advanced view](#)

Access Controls	Choices (2)	Attributes	Labels (1)
	Choices	New Search Updated	Search
	Choices	Label	Value Language Sequence Inactive Updated
		Open	open en 2020-03-17 14:55:13
		Archived	archived en 2020-03-17 14:54:59

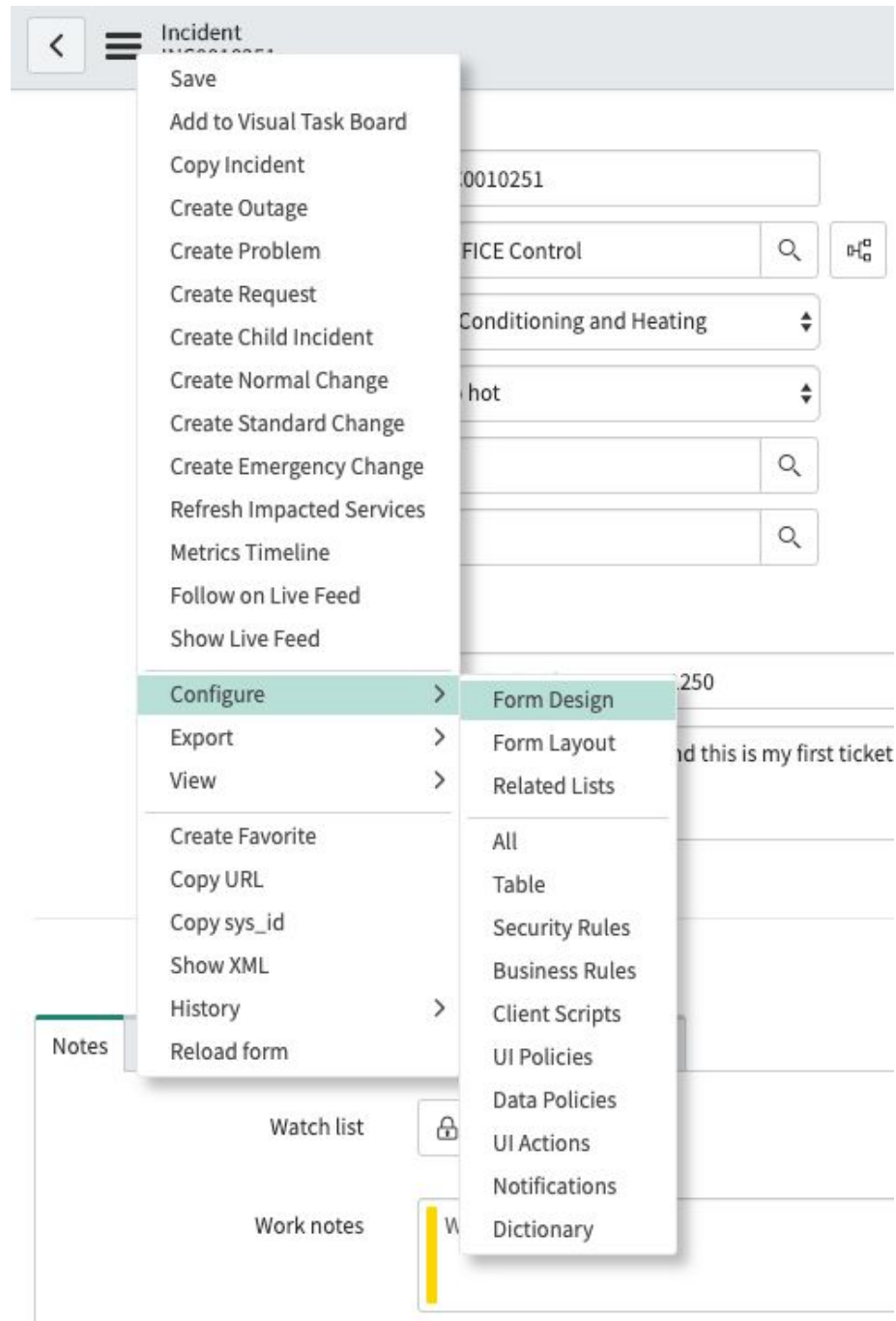
Table of required fields and values to enter as reference.

* Column Name	* Table	* Type	* Column Label	Attributes
u_iooffice_maintenance_request_id	Incident	Integer	Anything the customer would like to enter, as long as its clear its service request id	Format none
u_iooffice_maintenance_request_status	Incident	Integer	Anything the customer would like to enter, as long as its clear its a service request status	Format none

- d. Enable new field entries for all incidents in default view.
 - i. Open any incident via search bar and filter by default view



- ii. In incident view, click triple bar icon on the top left → *Configure* → *Form Design*



- iii. Find the two iOFFICE fields by searching custom label names



- iv. Add the fields anywhere in the ServiceNow Incident. In this example below, a new selection has been added (When viewing future incidents a tab named *ioffice* will contain the new fields as seen in initial screenshot at top of instructions.)

2. ***ioffice Client Configuration***- Will be set up by our implementation staff in conjunction with the customer.