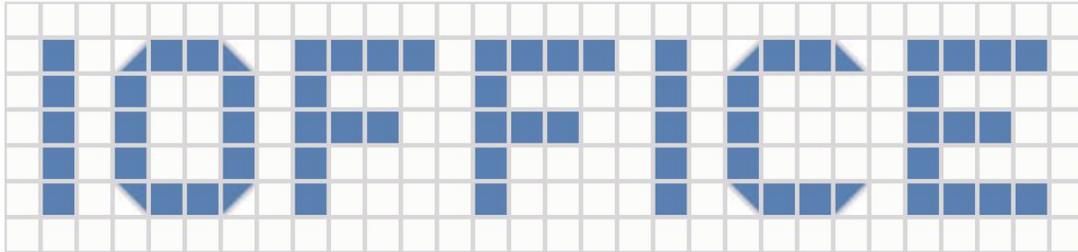


March 25, 2019

# 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
-

- 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 &lt;ticket id&gt;"</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 <i>open</i> or <i>closed</i> 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*

- 
- *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.

- 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

- Create IOffice Service Request Ticket for any request type.

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

- 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

**Assignments**

- Ron Swanson (In Progress)

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

**Request Summary -- Houston Service Request**

**Request Details**

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

**Requestor/Contact Information**

Requestor	Primary Contact	Request Location
Last Name: Service First Name: Customer Job Title: deed Email: jrodriguez@iofficecorp.com Space: 804B Phone: 123-456-7777	Last Name: Service First Name: Customer Job Title: deed Email: jrodriguez@iofficecorp.com Space: 804B Phone: 123-456-7777	Building: Houston Tower 2 Floor: 08 Space: 804B

**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

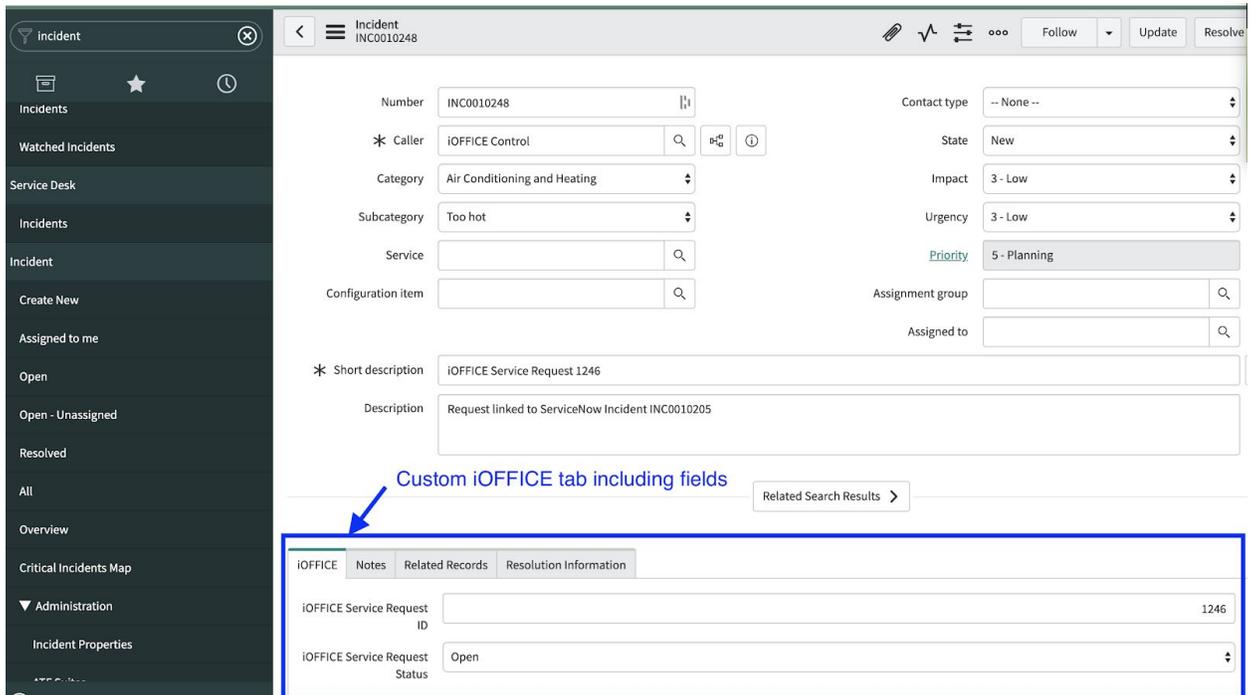
**Comments**

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

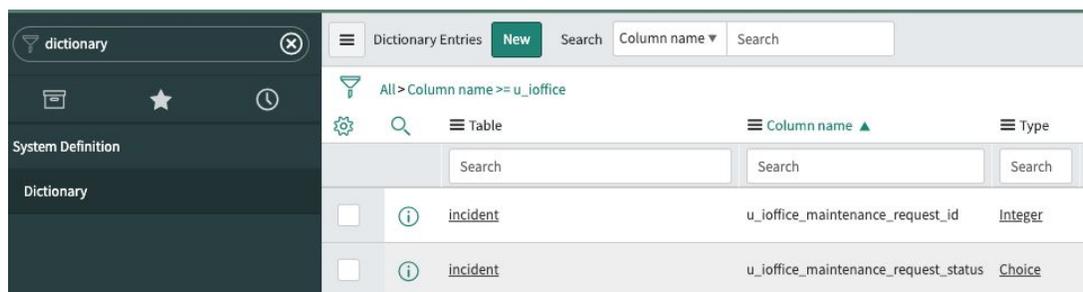
## Configuration

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:



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



- c. Create new field entries. See screenshots for each and table reference below.
  - i. *u\_ioffice\_maintenance\_request\_id*

\* Table: Incident [incident]

\* Type: Integer

\* Column label: iOFFICE Service Request ID

\* Column name: u\_office\_maintenance\_request\_id

Application: Global

Active:

Function field:

Read only:

Mandatory:

Display:

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 | Search

Dictionary entry = iOFFICE Service Request ID

Attribute	Value
Format	none

## ii. *u\_office\_maintenance\_request\_status*

\* Table: Incident [incident]

\* Type: Choice

\* Column label: iOFFICE Service Request Status

\* Column name: u\_office\_maintenance\_request\_status

Application: Global

Active:

Function field:

Read only:

Mandatory:

Display:

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)

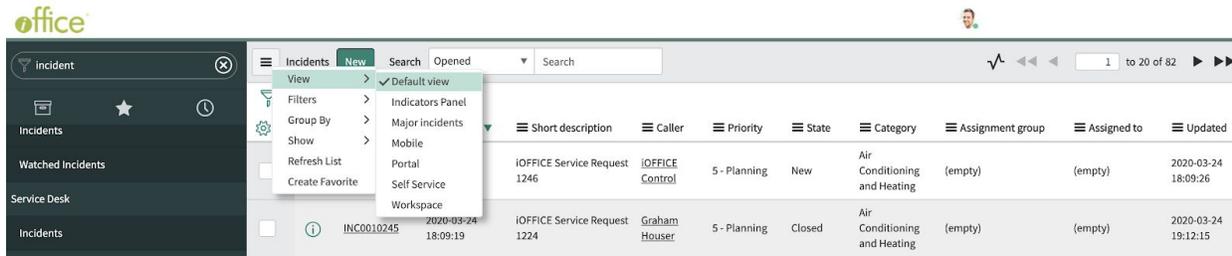
Choices | New | Search | Updated | Search

Label	Value	Language	Sequence	Inactive	Updated
Open	open	en		false	2020-03-17 14:55:13
Archived	archived	en		false	2020-03-17 14:54:59

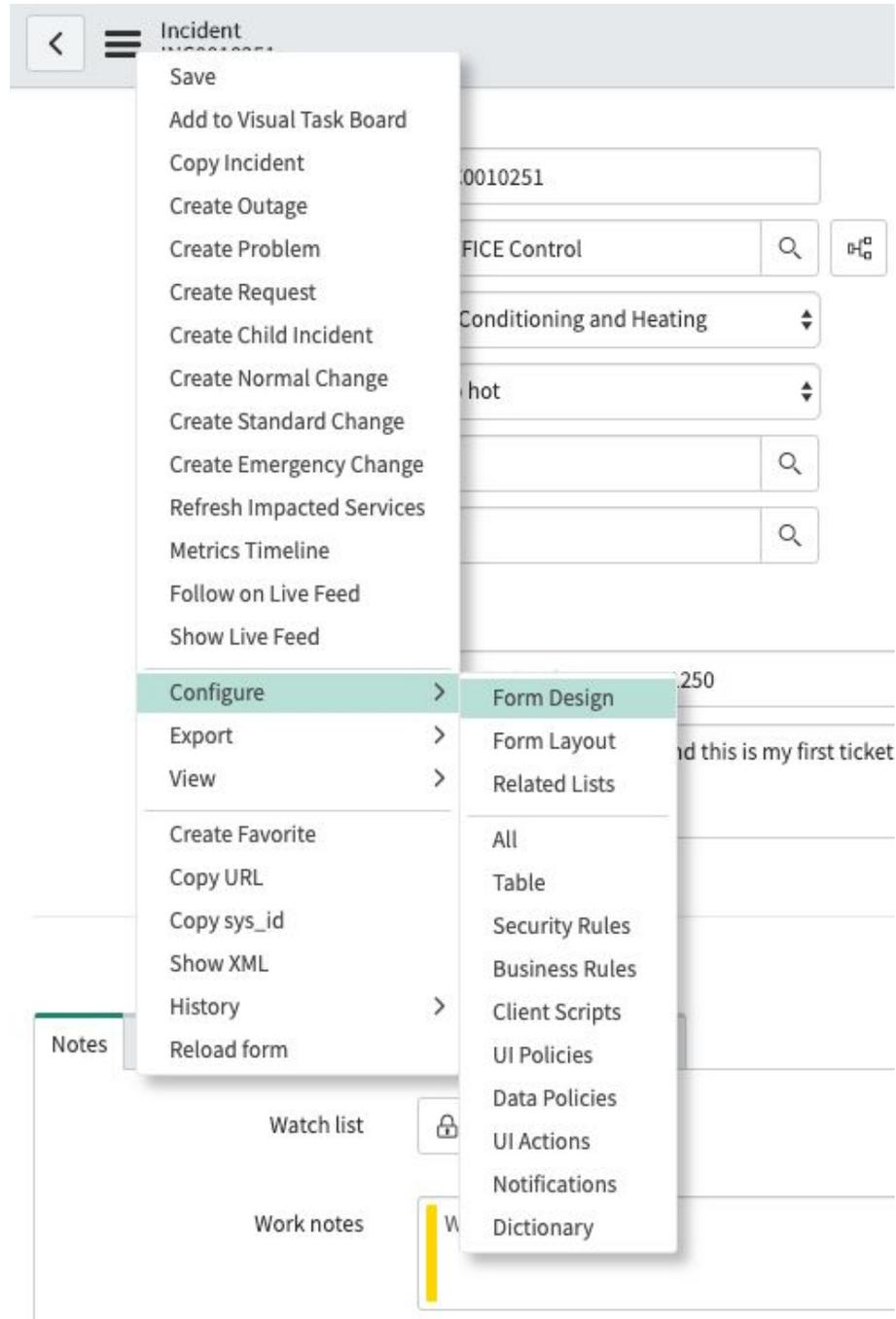
Table of required fields and values to enter as reference.

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

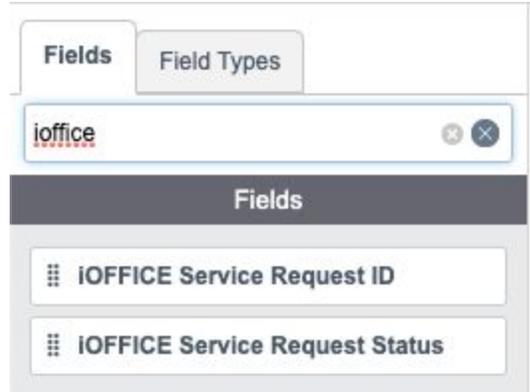
- d. Enable new field entries for all incidents in default view.
  - i. Open any incident via search bar and filter by default view



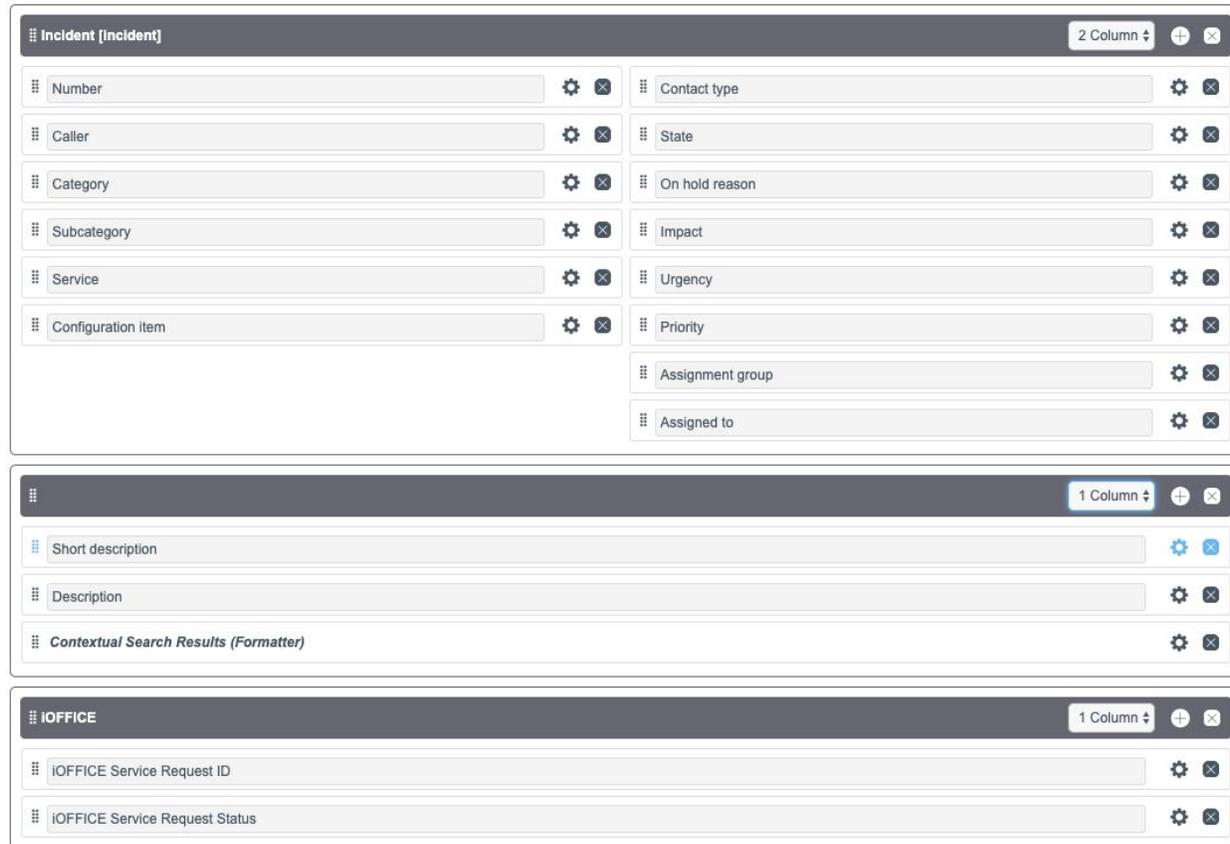
- ii. In incident view, click triple bar icon on the top left → *Configure* → *Form Design*



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.