

Service Now Feedback Session Debrief Notes (12/6/18)

About This Document: This document contains the debrief notes from the Service Now Hands-On Feedback Session on December 6, 2018, facilitated by Peyri Herrera and Anthony Rodgers. **Items perceived as “high importance to customers” are marked in yellow.**

Source: 36 customers from 17 organizations (# in parentheses is the # of customers): Chula Vista (1), Encinitas (2), Escondido Elementary (2), Escondido High (1), Fallbrook Elementary (1), Grossmont (1), Guajome Park Academy (1), MiraCosta College (1), Oceanside (4), Poway (2), San Diego County Office of Education (10), San Diego (1), San Marcos (1), Santee (2), Sweetwater (1), Valley Center-Pauma Unified (1), and Vista (4).

What We Like 😊

1. System Overall

- Seems pretty self-explanatory, easy to use
- User friendly
- Like that the screen didn't time out or inadvertently clear!

2. Portal/Home

- Like seeing everything all one home page (Portal) – all items/options are there
- Like the summary of “My Open Incidents” – Can see everything on the right side

3. Forms (Tickets)

- Like the fields on the forms
- Like how the 7 forms describe what the form is for (contextual – Example: “Performance Issue = Spinning, slowness, error messages”)
- The forms are cleaner, better
- It's easy to add an attachment
- I like that we don't have to name the attachment (LOTS OF AGREEMENT ON THIS)
- I like the ability to ask a quick question (“Ask a General Question” form)

4. Ticket Functionality

- Like being able to message the agent – don't have to ask who has the HEAT ticket

5. Knowledgebase

- Like the Knowledgebase

6. Other Functionality (Not Part of Phase 1)

- Like Community – could talk to each other and reach out (Community is not part of Phase 1)
- Like the “Popular Questions” – this is part of Community (Community is not part of Phase 1)

What We Don't Like 😞

1. System Overall

- **HIGH IMPORTANCE:** Need to be able to search for my tickets by keyword and ticket #.
- Anthony confirmed you can search your tickets from “grid” – he searched by Ticket #. Tina wants to know what else you can search by – need to find out.
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2. Portal/Home

- **HIGH IMPORTANCE:** Need to see all of my tickets in a grid format with many details.
– Need the option to be able to choose “the grid” for less than 20. (LOTS OF AGREEMENT)

- Include many details, like State, Last Updated, and details.
- "I could not find Closed tickets and other statuses." Need to see all.
- Need to be able to export to Excel (broken functionality in HEAT).

- Need dates in the summary "View All" page so I know when the ticket was resolved.
- On main page, where it is less than 20, shouldn't say "1 hour ago," it should say 12/6/18 3:25 pm, for example. (NOTE: If you hover, you can see date. We asked for it to be the other way around.)
- If you add a comment, it moved it up on the list so it looks like it was the most recent submission.

3. Forms (Tickets)

- HIGH IMPORTANCE: Need a way to state "Urgency" – Even though there is a date field, additionally there should be a way to communicate this
- Suggestion: Add commonly needed fields on Fix It – Because you need something to be fixed, agent would need common elements (EMPL ID, record #, position, etc.)

4. Ticket Functionality

- Would be nice to be able to "copy" someone on the ticket, like adding another email address so someone else is on the ticket and have a view on the information.
- RESOLUTION: Once a ticket is Resolved, am I going to just get an email that it is resolved, how much information do I get? We need the resolution/solution provided in the email.
- Prefer the word "Status" over "State."
- Performance Ticket with checkboxes on right-hand column, gives True, False, and more information. Don't like this. (LOTS OF AGREEMENT).

5. Knowledgebase

- Noticed that when you're not logged in, you don't get results on the KB search. It would be nice if you could search the KB without having to log in. (ERNIE)

Feedback About Forms

- **Needs Work/Consideration:**
 - Dates – It would be good to be able to put "N/A" for a date field
 - Dates – Format needs to change to MM/DD/YYYY
 - Fix It Form – For GL there is no list of screens. The others have a list.
 - Who Authorizes This Request – What does that trigger? If I can put any random name, will that cause confusion?
 - Breadcrumbs upon completing a form need to be cleaned up and made consistent
- **Discussion about Urgency:**
 - We would like the option to put URGENT – the majority of us will probably pick "today".
 - Follow up question from Anthony: "Would you just pick URGENT all the time?" Some said Yes, some said No. If pay/job related, would select URGENT. If it's a payroll deadline, would pick URGENT.
 - Anthony: "Let's say payroll is already done. What's the difference between selecting a date and a lower level urgency?"
 - On Forms & Outage side – gives "Urgent, Medium, Low" – doesn't give date. Screen looks different. Screens should look consistent.
 - Payroll issues might need to be resolved TODAY.

Feedback About Knowledgebase (KB)

- **Needs Work/Consideration:**
 - Would be helpful to create subcategories/modules. Not just "FIN" – example FIN/AP.
 - There should be some way to quickly find the topics within the KB.

- I like how you can be on a KB search it doesn't have to be in the category you picked.
- Can I search by phrase? Yes. (We are working on our standards for tagging metadata to make articles easily searchable.
- Agreement in room to keep the rating/comments (stars, "Top Rated Articles").
- **Process/Procedure:**
 - How often will the KB be updated?
 - HIGH IMPORTANCE: Who can access the KB? First choice is that it's open/public (no login). If that's not possible, create a role that is KB-only.
 - KB must not show confidential information.
 - Can we add more people to have access to the Service Now system?
 - HIGH IMPORTANCE: We do not want the KB replace the email announcements! The CRC email announcements should still be sent. (LOTS OF AGREEMENT ON THIS)

The Transition

1. How easy or difficult do you think it will be to transition to Service Now?

- The system is easy – not a lot of training is needed, however lots of communication would be good
- Strong preference that the 6-digit User ID is the user name (LOTS OF AGREEMENT)

2. What would make the transition easier/better?

- Good communication
- Classroom training opportunity
- Live online training opportunities
- Third Thursday Demo
- Webinar format
- On-site sessions/meetings – personal touch

3. Getting off of HEAT:

- HIGH IMPORTANCE: Concern about old HEAT tickets.
 - "Seems like it should be a district choice to bring over all tickets so they are archived."
 - "Can you send an Excel file of historical tickets to District Primary Contacts?"
 - "Can an Excel file of historical tickets be sent to the originator?"
 - "Can we have read only access to the HEAT system to copy get our old tickets? Like for 3 months?"
- For active tickets that are migrated: "How will we ensure that all Active come over? How do we track that?"
- Request to provide each district a list of who has access to HEAT/Service Now.

Other Comments

- 1 person mentioned they don't like the name "Service Now"