

# Service Now Feedback Session for Districts & Charter Schools

INTEGRATED TECHNOLOGY SERVICES

Hosted by Peyri Herrera & Anthony Rodgers (Education Business Services)

December 6, 2018

# Purpose of Today's Session

**Who:** For District PeopleSoft Contacts who currently enter HEAT tickets and would like to learn about the future ticket system called Service Now and provide input to the design/configuration of Service Now, hosted by Anthony Rodgers & Peyri Herrera

**What:** Participate in a group discussion, try out Service Now in a dev environment; ask questions; and provide feedback; leave knowing about the transition to Service Now so you can share it with others at your district

**Where:** SDCOE Learning Labs 2-4

**When:** Thu, 12/06/18 from 1:30-4:00 pm

**Why:** To provide feedback/input, to help shape the ticket system that will be used



## WHO'S IN THE ROOM?

36  
DISTRICT USERS

17  
ORGANIZATIONS

6  
EBS TEAM

7  
PROJECT TEAM

## Service Now Feedback (12/6/18)



### About You

Name: **Ray Lopez** Organization: **Chula Vista Elementary**  
About how many tickets do you submit per month?  
Tickets I Submit: Outage Performance Fix How To Security Request Question

### Login Information

For today's activity, you will be **Amy Farrah Fowler** from **Big Bang Theory Unified (100)**  
URL: Go to <http://erc.sdcoe.net/links> Username: **Fowler03** Password: **[See board]**  
Please use this entire packet to record your feedback. Please write the INC # if you report a specific issue.

### My Impressions of Service Now

Please list the pros and cons that you find.



Ray Lopez (Chula Vista Elementary) | Fowler03

### Forms

1. What kind of feedback do you have about the 2 forms?

### Knowledgebase

2. What kind of feedback do you have about the knowledgebase?

Ray Lopez (Chula Vista Elementary) | Fowler03

### Other Area(s) of Service Now

3. Did you look at other areas of Service Now? If so, what? What kind of feedback do you have?

### Transition from HEAT to Service Now

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

5. What would make the transition easier/better?

6. Only Active HEAT tickets will be brought over to Service Now. What are your thoughts about that?

## Report an Outage

System down

### \*Which Application?

- PeopleSoft Employment Self-Service (ESS)
- PeopleSoft Finance (FIN)
- PeopleSoft Human Capital Management (HCM)
- Hyperion (HYP)
- PeopleSoft Portal
- Service Now

### \*Which Browser?

- Google Chrome
- Mozilla Firefox
- Microsoft Internet Explorer
- Microsoft Edge
- Apple Safari
- Other

### \*When Did This Occur?

### \*How Many Users have been Affected?

### \*Urgency

### \*Customer Short Description

### Customer Description

## Requests

Query/data requests, data uploads, Hyp Extracts

### \*What type of request are you submitting?

### \*Which Application?

### \*Customer Short Description

### \*Customer Description

### \*Who authorizes this request

### When is your request completion date?

## White pages

These are screenshots and printouts that you can mark up.

# Overview/Context



Sheldon Cooper

Hello Sheldon

Search.... [magnifying glass icon]

**Knowledge Base** ✓  
Browse and search for articles, rate or submit feedback

**Get Help** ✓  
Contact support to make a request, or report a problem

**Community** ✗  
Connect with other users for answers to your questions

**Current Status** ✗  
[Progress bar] is reporting an issue  
More information...

**Popular Questions** ✗  
Does [user] have their Benefit Event?  
Is anyone else having an issue with logging into PeopleSoft?

**My Open Incidents** ✗  
Year-end pending approvals

**My Open Incidents** ✓

- Security Review of current approvers. INC0013842 • 19h ago • New
- Getting an error message when I try to access PeopleSoft ESS and Portal INC0013841 • 20h ago • New
- Could not access Service Now the afternoon of 12-3-18 INC0013840 • 21h ago • New
- How can I change the PO Buyer on Purchase

**Top Rated Articles** ✓

- Why is ee receiving separate Additional Pay amounts in their check for the same Earnings Code? ★★★★★
- Cannot assign a Work Schedule for a new hire ★★★★★
- Not able to Approve Travel Authorization (TA) ★★★★★

**Announcements** ✗  
No announcements available

# Sample Service Now Portal Screen for Customer

## OUR FOCUS FOR TODAY:

- Get Help
- Knowledge Base
- Search

“What types of tickets do you submit?”

# Quick Warm-Up Activity

	<b>O = Outage</b>	<b>P = Performance</b>	<b>F = Fix</b>	<b>HT = How-To</b>	<b>S = Security</b>	<b>R = Request</b>	<b>Q = Question</b>
Do you submit this type of ticket?							
Specific example:							

## 1. Why are we changing from HEAT to Service Now?

- Improved tool and functionality
- Improved efficiencies
- Cost-savings
- A solution for ITS' initiative to offer a one-stop shop for customers
- Web-based + can be used on phones/tablets
- Potential to replace other tracking systems

## 2. How will this be different than what a PeopleSoft Contact does currently in HEAT? What are the benefits?

- New URL, new login
- You will pick from 7 “forms” to submit your ticket
- You will have a lot more opportunity to interact with your ticket! More feedback, more tracking, this is where you will go to see the status and interact (type in the box and it adds to the ticket work activity)
- A ticket will be in a “Resolved” state for ‘X’ days before it becomes “Closed.”
- Knowledgebase (KB) is being built! Search it first to see if the answer you’re looking for is there.

### 3. What are the steps to transition to the new ticket system?

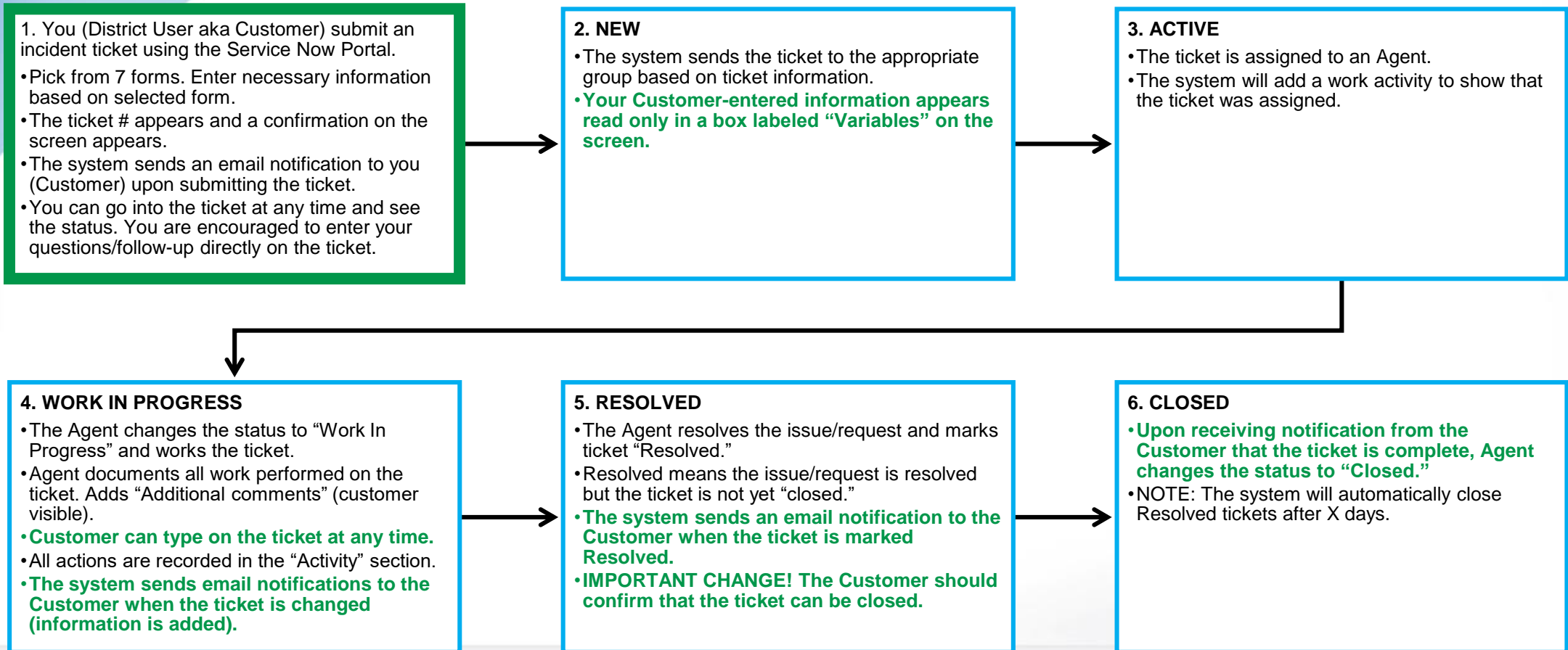
- **Project phases:** Analysis, design, development, testing, documentation, pilot, training (external and internal), cutover activities, go live, support, evaluation
- **Objectives:** Purposeful approach, clean/simple interface, “one-stop shop”, high district involvement, highly responsive
- **When is Go Live?** The EBS Use Case is targeted for Spring 2019
- **What will happen to HEAT tickets?** At Go Live, any “active” HEAT tickets will be imported to Service Now. If you have a ticket that is migrated, we will tell you the new “INC #.”

### 4. How will districts be involved and/or learn about the changes?

- **December 2018:** First announcement, CRC webpage launched, feedback session
- **January-March 2019:** Multiple announcements, CRC webpage updates, ITS taking the “show on the road”, hands-on training session, recorded demo (Third Thursday)
- **After Go Live:** Survey



# What is the general flow?



# DEMO

We are not hands-on quite yet! Anthony will demo the Service Now functionality.

## Directions:

- Watch the demo.

# GUIDED ACTIVITY

**Scenario:** You work at one of 4 school districts (Big Bang Theory Unified, Lost Unified, Friends Elementary, Happy Days High). You need to submit a ticket!

## Directions:

- Everyone has a unique login.
- Follow along and do what Anthony does.
- We will log into a Dev environment as fictitious district users to enter a “Fix It” ticket together.
- **Our Steps:** Log in, click Get Help, click “How To” Help ticket, enter the ticket information, click Submit.

**NOTE:** Please track all Incident #s you create!

# INDEPENDENT ACTIVITY

**DIRECTIONS:** Spend your time on either or both of these! Please use the handouts to record your notes/feedback.

**Time:** 50 min *Please take your own 5-10 minute break as needed during this time.*

## Activities:

- 1. Spend time reviewing the forms.** Try entering sample tickets. Do you like the questions? Should they be organized differently on the page? What would you change? Did anything work in a way that was not expected?
- 2. Spend time considering what you would want from a knowledgebase.** How types of words/phrases would you use to search? What would you expect a knowledgebase article to have? What would benefit you? What would frustrate you?

# DEBRIEF

Let's share out! We will go through each page of the packet to hear your feedback.

## Directions:

- Finalize your notes.
- Help contribute by sharing aloud.