ServiceNow Data Request Process

NAVIGATION OVERVIEW

1. Login in to your licensed ServiceNow account: https://titans.service-now.com.
   a. After logging in, you should see the "ITIL Homepage"
   b. If you do not see the "ITIL Homepage", click on the star tab in the left pane and click the "Home" option - This will take you to the "ITIL Homepage".
   c. Use the “Home” button to return to the ITIL Homepage and list of pending Tasks at any time.

2. The structure of each request will have the following characteristics. A Request Item (parent level) and the catalog task(s) (child level) associated with it.
   a. Request Items have the following prefix: RITM
      i. Record contains the details of the request
   b. Catalog tasks have the following prefix: TASK
      i. Record contains the individual tasks that need to be completed for the request to be fulfilled.

3. The level can be identified at the top of the record or by looking at the number field.

4. Look for the section "My Work" - these are all open catalog tasks currently assigned to your unit (NOTE prefix RITM).
5. Click on any of the TASKXXXXXX links to go directly to an assigned task. This will bring up the record for that task.
6. In record under the "Variables" section (in grey), you can view details of the request.
   a. Click on the "Notes" tab to view notifications coming from this request.

7. To see current pending/completed tasks for the RITM, see the related list at the bottom of the record under the "Catalog Task" tab (RITM level).
A REQUEST IS ASSIGNED TO A DATA STEWARD GROUP

1. When a new Data Request (RITM) is submitted, the request is assigned to the applicable Data Steward Group by the Office of Assessment and Institutional Effectiveness (OAIE).
   a. The Data Steward Group receives a confirmation of assignment email with subject, “Catalog TASK#### has been assigned to you” which contains the details of the request.
   b. Data Steward assigns it to their group’s internal Fulfillment person (as applicable) outside of ServiceNow.
      i. It is recommended that the fulfillment person communicate with the client immediately that they have received the request and are working on it, otherwise any additional comments the requester makes will go to the Data Steward Group in ServiceNow.
      ii. Internal requesters have the option to add an “Attachment” which is indicated in the request’s details. The Data Steward is responsible for downloading the attachment from ServiceNow.

   ![Email screenshot](image)

   c. The requester receives an email confirming the assignment which includes the Data Steward Group’s contact information. As noted above, the fulfillment person should reach out immediately to the requester with their own contact information.

   ![Email screenshot](image)
NOTE: Requesters may also submit additional comments after they have submitted their request. The Data Steward Group receives an auto generated message with subject, “Your Centralized Data Request has been updated with comments. You may also reply to the message with additional comments”. The Data Steward does not need to log into ServiceNow. When they reply to the system generated email, the requestor will be notified and the comments will be recorded. If the request has been forwarded to an internal Fulfillment person who has not yet contacted the requester, the Data Steward should forward the additional comments to them.

2. Login to ServiceNow. All open RITM’s appear on your homepage.
   a. Short description indicates, “Process and deliver data request”.

NOTE: Depending on number of open items you have, you may need to scroll to the next page using the arrow bars at the bottom right.

3. From the ITIL Homepage, Click on the TASK # to view additional information, close the task, or reassign to a different Data Steward Group.
4. In the Task level view, the requestor’s information appears in the header. DO NOT overwrite any fields.

a. If an attachment was included, scroll down to the “Related Attachments” tab and click on the file name to download. IMPORTANT: Always follow university data security protocols when downloading/forwarding attachments.

NOTE: You may also toggle back and forth between the TASK level and RTIM level view by clicking on each level.
In the RITM level view, attachments are located in the top left corner. Click on the file to download. IMPORTANT: Always follow university data security protocols when downloading/forwarding attachments.

5. From the TASK level view, click “CLOSE TASK” (top right corner) when the data request has been fulfilled.
   a. The RITM will no longer appear on your home page since it is “Closed”.

REASSIGNING A TASK TO A DIFFERENT DATA STEWARD GROUP

1. If your Data Steward group has been assigned a TASK in error, you may reassign it to a different Data Steward Group.
   a. From the TASK level view, use the “Assigned To” field, click the Search icon and select from the list of Data Steward Groups.
   b. Click SAVE to commit the change
      i. New Data Steward Group will receive notification email of assignment.
      ii. Requester will receive notification of the new assignment with contact info.
      iii. The RITM will no longer appear on your ITIL Homepage.
DELETING A REQUEST IF NECESSARY

1) If you determine a data request is a duplicate and needs to be deleted:
   a. From the TASK level view, use the drop down to change the “State” field to “Closed Declined” (or any other closed state as long as it’s not Closed Complete – see pic1)
b. Click on the “Update” or “Save” button at the top of the record to commit the change.

c. The request will close and no further action can be taken on it. It will also be removed from your homepage.