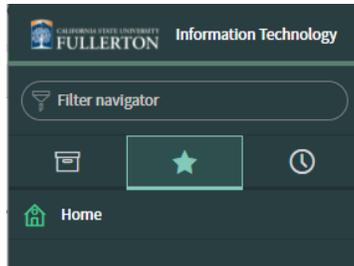


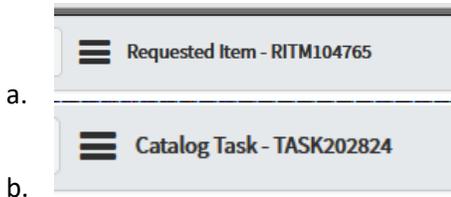
# ServiceNow Data Request Process

## NAVIGATION OVERVIEW

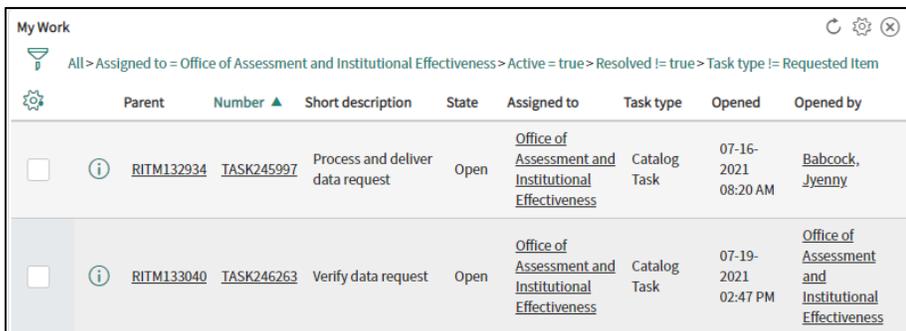
1. Login in to your licensed ServiceNow account: <https://titans.service-now.com>.
  - a. After logging in, you should see the "ITIL Homepage"
  - b. If you do not see the "ITIL Homepage", click on the star tab in the left pane and click the "Home" option - This will take you to the "ITIL Homepage".
  - 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.

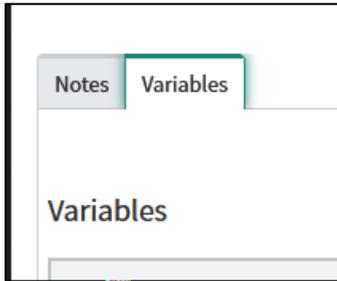


4. Look for the section "My Work" - these are all open catalog tasks currently assigned to your unit (NOTE prefix RITM).



Parent	Number	Short description	State	Assigned to	Task type	Opened	Opened by
<input type="checkbox"/>	<a href="#">RITM132934</a> <a href="#">TASK245997</a>	Process and deliver data request	Open	<a href="#">Office of Assessment and Institutional Effectiveness</a>	Catalog Task	07-16-2021 08:20 AM	<a href="#">Babcock, Jyenny</a>
<input type="checkbox"/>	<a href="#">RITM133040</a> <a href="#">TASK246263</a>	Verify data request	Open	<a href="#">Office of Assessment and Institutional Effectiveness</a>	Catalog Task	07-19-2021 02:47 PM	<a href="#">Office of Assessment and Institutional Effectiveness</a>

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).

Catalog Tasks (2)		Approvers			
Number	Assignment group	Assigned to	Short description	State	Due date
<a href="#">TASK245997</a>	Data Request stewards	Office of Assessment and Institutional Effectiveness	Process and deliver data request	Open	07-16-2021 08:16 AM
<a href="#">TASK245996</a>	Data Request stewards	Office of Assessment and Institutional Effectiveness	Verify data request	Closed Complete	07-16-2021 08:16 AM

## 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.

FW: Catalog Task TASK246875 has been assigned to you  
 You replied to this message on 7/23/2021 11:53 AM.

Short Description: Process and deliver data request  
 Request Item: Centralized Data Request  
 Task State: Open

Request Opened by: Villegas, Esperanza  
 Opened by phone: (657)278-2187

Click here to view Task: [TASK246875](#)  
 Click here to view Item: [RITM133335](#)

Order Summary	
First Name	Robert
Last Name	Dawson
Email	<a href="mailto:robertdawson@Fullerton.edu">robertdawson@Fullerton.edu</a>
Company/Department	Assessment and Institutional Effectiveness
Phone	(657)278-2245
What type of data are you requesting?	Student Financial Information
Request needed by	Standard processing time (2-3 weeks)
Reason for data request	This is a test
Description of data request	This is a test
Have you requested this data before?	No
OAIE Functional Area	Referred Elsewhere
Responsible data steward group	IT
Analyst	Luzzi, Joseph
Attachment included?	Yes 

- 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.

Reply Reply All Forward IM

Helpdesk <helpdesk@fullerton.edu> | Villegas, Esperanza

**Data request RITM133150 has been assigned**

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The data request RITM133150 you made on 07-20-2021 04:23 PM PDT has been assigned to the appropriate ca contacting [jluzzi@fullerton.edu](mailto:jluzzi@fullerton.edu) regarding the status of your request if you have questions. You will be contacte request. Please allow at least three weeks for completion of your data request. Thank you.

**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.



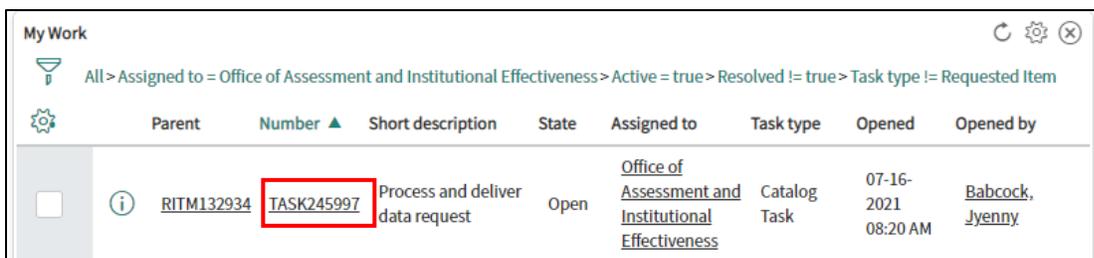
2. Login to ServiceNow. All open RITM’s appear on your homepage.
  - a. Short description indicates, **“Process and deliver data request”**.



**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.

The screenshot shows the header of a task level view. The 'Parents' field is highlighted with a red circle and contains the text 'RITM133150 > TASK246550'. Other fields include 'Requested for Client' (Villegas, Esperanza), 'Username' (esvillegas), 'Business phone' ((657)278-2187), 'Room' (CP-931), 'Department' (Assessment and Institutional Efi), 'Primary DITC' (Villegas, Esperanza), 'Item' (Centralized Data Request), 'Price' (\$0.00), 'Number' (TASK246550), 'Opened by' (Villegas, Esperanza), 'Assignment group' (Data Request stewards), 'Assigned to' (Luzzi, Joseph), 'Delegate' (empty), 'Priority' (4 - Low), 'State' (Open), and 'Request item' (RITM133150).

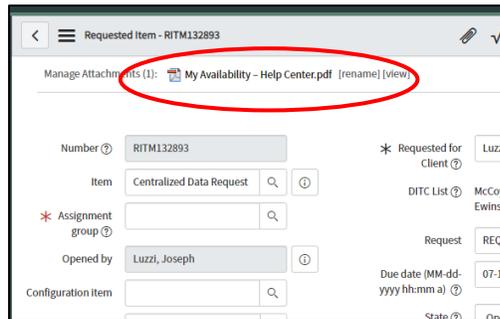
- a. If an attachment was included, scroll down to the "Related Attachments" tab and click on the file name to download. IMPORTANT: Always follow university data security protocols when downloading/forwarding attachments.

The screenshot shows the 'Related Attachments' tab in a system. A red arrow points to the 'Related Attachments' tab. The tab contains a table of attachments. The first attachment is highlighted with a red circle and has the file name 'Accessibility Evaluating-Accessibility-in-Excel (2).xlsx'. The table has columns for 'File name', 'Compressed', 'Content type', and 'File name'. The 'Content type' column contains the value 'application/vnd.openxmlformats-officedocument.spreadsheetml.sheet'. Below the table, there is a dropdown menu for 'Actions on selected rows...'. The 'Related Attachments' tab is selected, and the 'Data Security Assessment' tab is also visible.

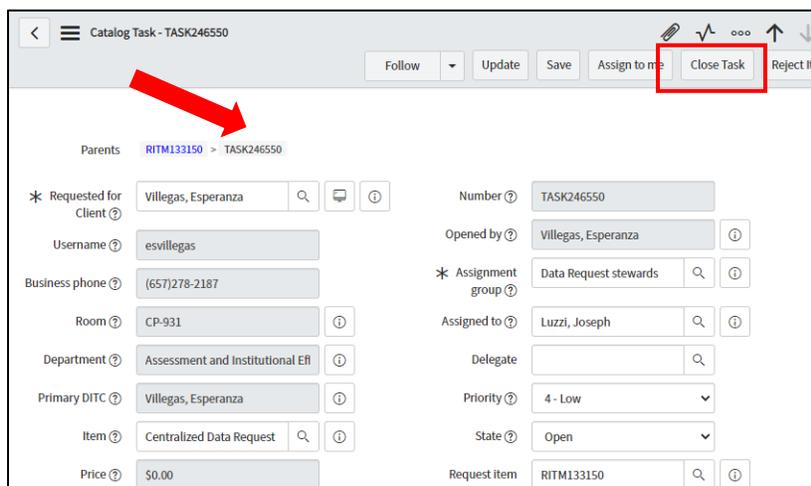
**NOTE:** You may also toggle back and forth between the TASK level and RTIM level view by clicking on each level.

The screenshot shows the header of a RTIM level view. The 'Parent' field is highlighted with a red circle and contains the text 'RITM133150 > TASK246550'. Other fields include 'Requested for Client' (Villegas, Esperanza), 'Username' (esvillegas), 'Business phone' ((657)278-2187), 'Room' (CP-931), 'Department' (Assessment and Institutional Efi), 'Primary DITC' (Villegas, Esperanza), 'Item' (Centralized Data Request), 'Price' (\$0.00), 'Number' (TASK246550), 'Opened by' (Villegas, Esperanza), 'Assignment group' (Data Request stewards), 'Assigned to' (Luzzi, Joseph), 'Delegate' (empty), 'Priority' (4 - Low), 'State' (Open), and 'Request item' (RITM133150).

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.

Catalog Task - TASK246550

Follow Update Save Assign to me Close Task Reject Item

Parents RITM133150 > TASK246550

\* Requested for Client Villegas, Esperanza

Username esvillegas

Business phone (657)278-2187

Room CP-931

Department Assessment and Institutional Eff

Primary DITC Villegas, Esperanza

Item Centralized Data Request

Price \$0.00

Number TASK246550

Opened by Villegas, Esperanza

\* Assignment group Data Request stewards

Assigned to Luzzi, Joseph

Delegate

Priority 4 - Low

State Open

Request item RITM133150

## 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)

Catalog Task - TASK202987

Follow Update Save Assign to me Close Task Reject Item

Parents RITM104878 > TASK202987

\* Requested for Client Sasahara, Warren

Username wsasahara

Business phone (657)278-8344

Room LH-666

Department IT - Applications Services

Primary DITC Edwards, Miriam

Item Centralized Data Request

Price \$ 0.00

Number TASK202987

Opened by Sasahara, Warren

\* Assignment group Data Request stewards

Assigned to Office of Assessment and Institut

Delegate

Priority 4 - Low

State Open

Request item RITM104878

Notes Variables

\* Short description Verify data request

(pic1)

Priority 4 - Low

State Open

Closed Pending

Open

Watch list Work in Progress

Closed Complete

Closed Declined

Closed Incomplete

Closed Skipped

b. Click on the “**Update**” or “**Save**” button at the top of the record to commit the change.

Update Save

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

State Closed Declined

Stage Completed