ServiceLink Projects for Campus Partners
Parking Lot

- Parking Lot
  - Capture any questions or concerns that cannot be addressed during class
  - Provide follow up to all attendees of this class
Course Agenda

1: ServiceNow Roles and Access

2: Viewing Projects and Working Tasks
Course Objectives

By the end of this course, you should be able to:

• Access ServiceNow
• Understand your ServiceNow Role
• Understand ServiceNow email notifications
• Access and use ServiceNow Dashboards
• View ServiceNow Projects and Project Tasks
• Work on and complete Project Tasks
ServiceNow Roles and Access

Module 1
The module learning objectives are:

- Know the ServiceNow Campus Partner roles
- Understand how each role accesses ServiceNow Projects and Tasks
Accessing ServiceNow

ServiceNow URL: https://ucrsupport.service-now.com

Login with your UCR NetID and Password:
# SIS Campus Partner Roles

<table>
<thead>
<tr>
<th>Role</th>
<th>Access Details</th>
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| **Stakeholder**    | • Identified by ITS Project Manager and added to applicable project(s)  
• Read only access to Projects where identified as a Stakeholder  
• Access to view and edit all Tasks associated with Projects where identified as a Stakeholder |
| **Campus Partner Manager** | • Can view any Project and associated Tasks where direct reports have been assigned tasks  
• Project access is read only  
• Can view and edit all Tasks associated with applicable Projects |
| **Campus Partner**  | • Read only access to any Project where Tasks are assigned  
• Read only access to all Tasks associated with applicable Projects  
• Can edit *only* assigned Tasks |

 BearHelp@ucr.edu | (951) 827-IT4U (4848)  
https://its.ucr.edu/bearhelp
Campus Partner Dashboards

Each Campus Partner role has its own Dashboard to help keep track of Tasks and Projects:

To access the Dashboard, select the Dashboard dropdown menu at the top of the screen and select from the Dashboard list.

**Note:** Once you select a Dashboard, it will be your Homepage in ServiceNow until you select another Dashboard.

You can return to the Homepage at any time by clicking the logo in the top left of the screen.
Campus Partner Dashboards

If unable to see dashboards, you may need to change your default Home setting:

Click the Gear icon in the top right hand corner of the screen.

Make sure Dashboards is selected as the Home option.

The Dashboards icon indicates you are viewing Dashboards.
The Campus Partner Stakeholders Dashboard provides an overview of all Projects the Stakeholder has been added to.

Clicking a chart segment will take you to a list view of the assigned Projects.
Stakeholder Access

The example below shows the Project list view after clicking on a Partner Stakeholders Dashboard chart segment:

Note: Tasks associated with a Project can be accessed via the Project record. This will be covered later in this module.
Stakeholder Access

In addition to using the Dashboard to track Projects, Stakeholders receive an email when they are added to a Project:

Clicking the link in the email will open the Project (sign in may be required)
Campus Partner Manager Access

The Campus Partner Manager Dashboard displays Tasks assigned to the Campus Partner Managers direct reports:

Clicking on any chart segment will take you a list of applicable Tasks.
Campus Partner Manager Access

The example below shows the Task list view after clicking on a Campus Partner Manager Dashboard chart segment:

Click a Project name to open a read only view of the Project

Click a task number to view or edit the task

The tasks listed will be assigned to your direct reports
The Campus Partner Dashboard displays Tasks assigned to the Campus Partner:

Clicking a chart segment will take you to a list view of the appropriate Tasks and Projects.
Campus Partner Access

The example below shows the Task list view after clicking on a Campus Partner Dashboard chart segment:

- Click a Project name to open a read only view of the Project.
- All tasks are assigned to the Campus Partner user.
- Click a task number to view or edit the task.
Campus Partner Access

When a Task is assigned to a user, an email is sent to them:

Clicking the link in the email will open the Task (sign in may be required)
Module Objectives Review

Having completed this module, you should be able to:

• Know the ServiceNow Campus Partner roles

• Understand how each role accesses ServiceNow Projects and Tasks
Module Review

Introduction

• You now have the opportunity to assess your knowledge of the information presented in this module.

• The questions and answers presented in this review help you to determine whether you remember and understand the important points.
All Campus Partner Roles can edit any task that is a part of a Project they are associated with.

False: Stakeholders and Campus Partner Managers can edit all Tasks. Campus Partners can only edit Tasks that are assigned to them.
The Dashboards screen is the Homepage in ServiceNow. To access the Homepage, click the logo in the top left of the screen.
Viewing Projects and Working Tasks

Module 2
Module Objectives

The module learning objectives are:

• Know how to view Projects and Tasks
• Understand how to work and complete Tasks
Viewing Projects

For all users, projects open in a read only view.

**Note:** Campus Partner Managers and Stakeholders can edit all Tasks associated with a Project. Campus Partners can only edit Tasks assigned to them.
Viewing Projects

The Planning Console link in a Project record allows users to see an overview of the project timeline and associated tasks:
Viewing Projects

- The overall Project timeline and dependencies are listed on the Gantt chart.
- Items can be expanded using the arrows.
- Tasks are listed in chronological order.
- Right click a Task name to view / edit the Task.
- Return to the regular view of the Project.
Viewing Projects

Click to add / remove columns from the console view

Selecting the column will add it to the Planning Console

In this example, the Assigned to column is added to the columns displayed
Viewing Tasks

Clicking on a Task Number from either a list view, from within a Project, or from the Project Planning Console opens the Task for viewing / editing:

The Project can be accessed by clicking the Project name at the top of the Task

When a task is initially assigned, the State will be set to Pending and Percent complete will be 0

The tabs in the task provide access to additional information

Task information will be updated in the Notes and Checklist tabs as the Task is worked on
Updating Task State

Once work begins on a task, the State should be set to Work in Progress.

Percent complete should be updated periodically as progress is made on the task.

Note: If Percent complete is changed to a number other than 0, the State will automatically update to Work in Progress.
Adding Notes to Tasks

As a Task is worked, Comments should be added to record progress:
Adding Notes to Tasks

Task comments can also be used to @mention other users:

Adding an @ followed by a person's name will tag them in the task. The person tagged will receive an email letting them know they were tagged.

Note: The person being tagged will only have access to the Task to read the note if they are already assigned another Task in the Project. If they are not assigned a task, neither the Task or Project are visible.
Added Note Notification

If comment is added to a Task by another user, an email is received by the Task owner:

Clicking the link in the email will open the Task (sign in may be required)
A Task may have multiple items that need to be executed to complete it. To help you and others track your progress, you can create a Checklist.

To create a new Checklist, click the arrow next to the Checklist text and click Create new:
Project Task Checklists

After creating a Checklist, items can be added to it by clicking in the Add Item text box, entering your list item and pressing Enter:

As list items are completed, they can be checked off:

Note: Checking items off a list doesn’t automatically update Percent complete. Percent complete should be updated manually as items are checked off the list.
Adding Attachments

To upload an attachment, click the Paperclip icon at the top of the Task screen:

Select Choose file:
Adding Attachments

Navigate to a file and select it to upload it:

Once uploaded the file will show in a list of attachments.

Attachments are listed at the top of the Task:

Note: To add additional attachments or to remove existing attachments, click Manage Attachments or click the paper clip icon.
Saving Changes to Project Tasks

To save changes to a task, click the Update button at the top of the Task screen. Clicking Update will save changes and redirect to the previous screen.
Closing a Project Task can be accomplished in two ways: By Changing the Percent complete to 100, or by changing the State to Closed Complete.

If you change Percent complete to 100 it will change the State to Closed complete and if you change State to Closed complete it will update the Percent complete to 100.
Module Objectives Review

Having completed this module, you should be able to:

• Know how to view Projects and Tasks
• Understand how to work and complete Tasks
Module Review

Introduction

• You now have the opportunity to assess your knowledge of the information presented in this module.

• The questions and answers presented in this review help you to determine whether you remember and understand the important points.
True or False

Changing Percent complete in a Task to a number other than 0 will also update the Task State.

True: If the Percent complete is set to a number other than 0, the Task State will be updated to Work in Progress.
Comments can be added to tasks by users other than the task owner if they have edit privileges.

True: Stakeholders and Campus Partner Managers are able to edit Tasks that are not assigned to them including adding Comments.
True or False

To save changes to a Task, I should click the Save button at the top of the screen.

False: The Update button is used to save changes to Tasks.
I can close a Task by changing the Percent complete to 100, or by changing the State to **Closed Complete (4)**.
Course Review
Course Agenda Review

1: ServiceNow Roles and Access

2: Viewing Projects and Working Tasks
Course Objectives Review

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• Access ServiceNow
• Understand your ServiceNow Role
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Parking Lot

- Review parking lot
  - Have all questions been answered during our class?
  - Are there any new questions to add to the list?
You have completed the SIS Campus Partner ServiceNow Introduction training course.