ServiceNow Fiscal Customer Quick Reference Guide

This reference guide is designed to provide a high-level overview of how Fiscal customers can use ServiceNow and in particular how the new pre-bill expense line review process works.

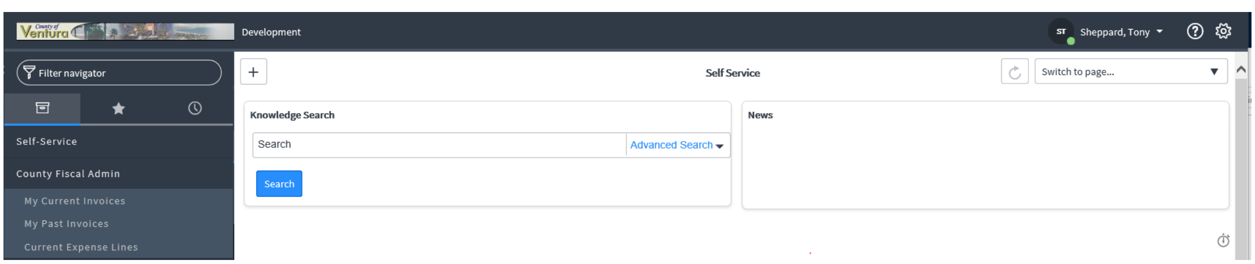
Login

The link to the county's ServiceNow instance is https://countyofventura.service-now.com/ That link will display a County of Ventura "splash" screen with instructions to sign with your organizational account. Your login name is your email address and your password is the password you use to log on to your computer. If your agency has implemented single sign-on you may not be prompted to log in at all, but may be taken to the ServiceNow home page. NOTE: if you currently use https://countyofventura.service-now.com/side_door.do to access your invoices you will continue to do so.

User Interface 15 (UI15) versus User Interface 16 (UI16)

If your home page banner looks like the screen shot below, you are on UI15. We highly recommend that you switch your user interface to UI16 as the way it handles stored filters and favorites is more user-friendly.

To switch your user interface to UI16, click on the gear icon ( ) in the upper right corner of the banner line and click on the button labeled "Switch to UI16". Your screen will immediately refresh with the updated user interface.



System Settings Menu

The **General System Menu** provides several settings to improve user experience. Slide tabs right to turn a feature on, and left to turn a feature off. We recommend that you explore the general settings to determine which settings you prefer.

Accessibility Enabled: defaults to off.

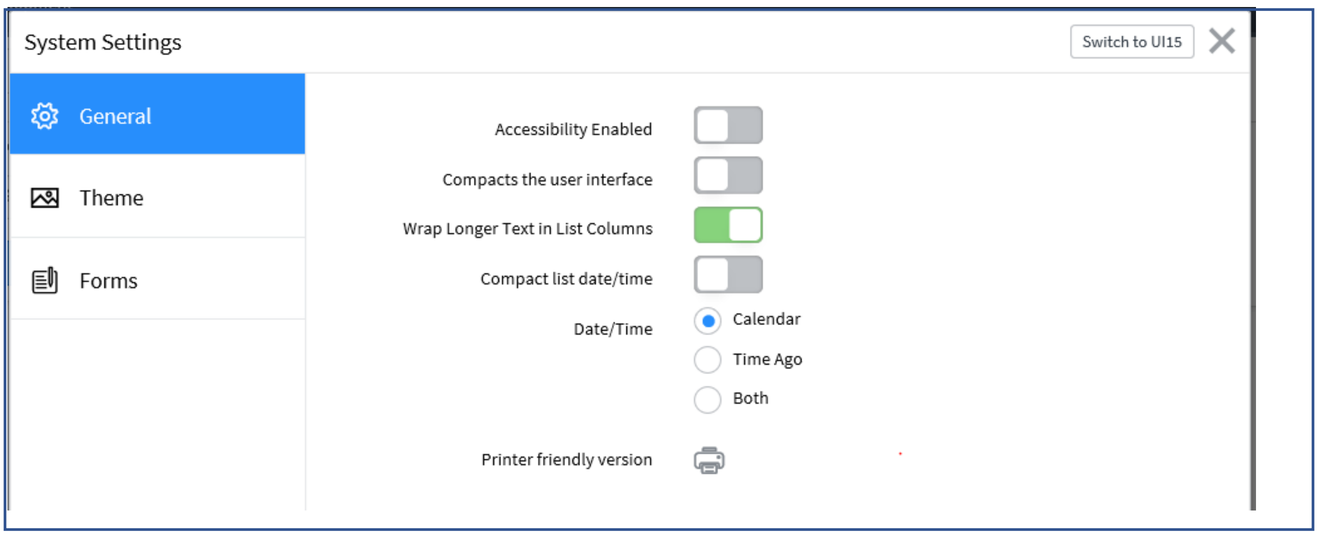
Compacts the user interface: defaults to off.

Wrap longer text in list columns: Long strings wrap in list columns instead of appearing as one long line when this setting is enabled.

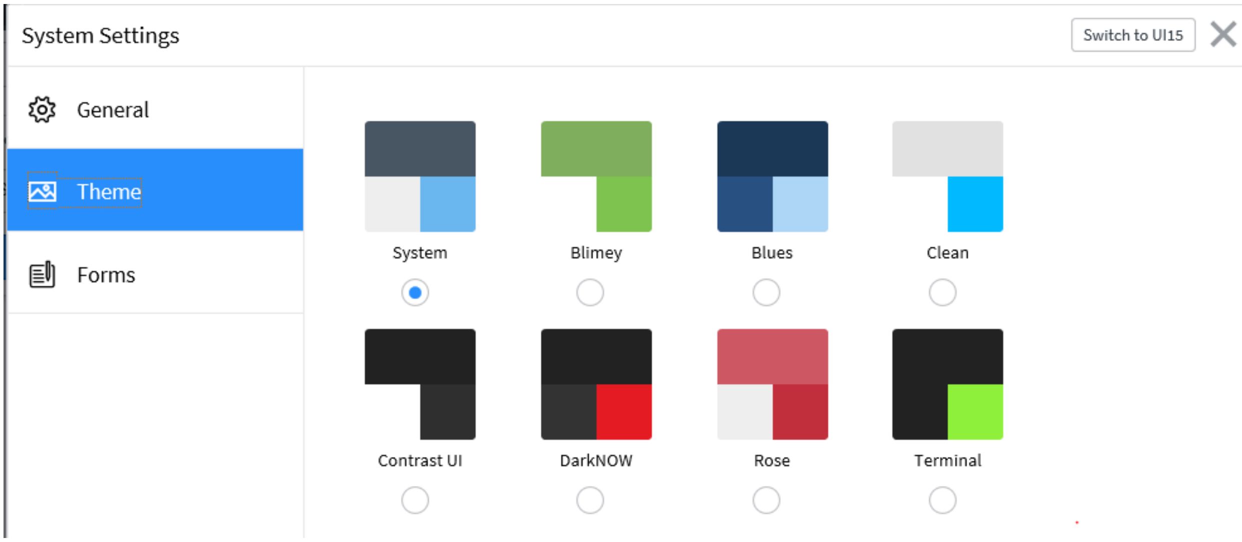
Compact list date/time: Date and time values appear in a compact format when this setting is enabled. The year is not shown for date values within the current year, and seconds are not shown for time values. This setting is not available if the **Date/Time** selection is **Time Ago**.

Date/Time: We recommend that you use the default selection of Calendar date time

Printer friendly version (): opens a printer friendly version of the current content frame. NOTE: there is a known issue with a critical MS patch that causes the "Printer Friendly Version" to not be able to work with IE11. If you have that issue try an alternate browser like Chrome or Firefox.



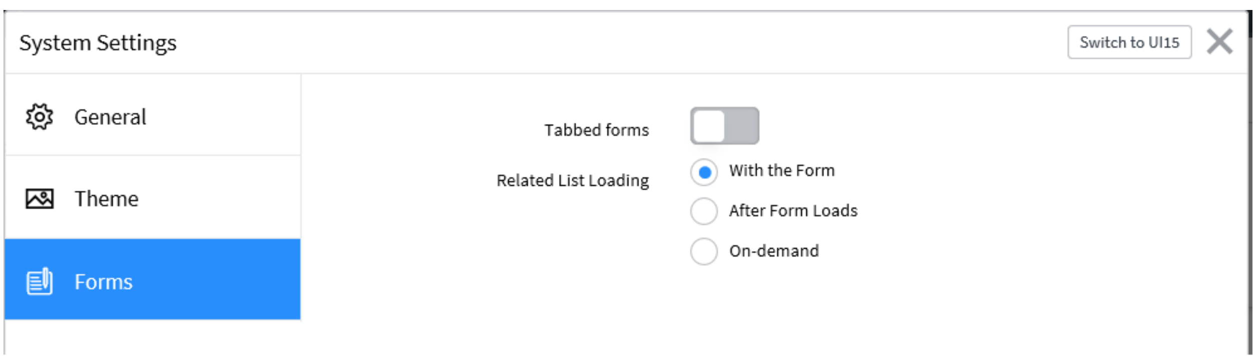
The **Theme System Settings Menu** allows you to change the color scheme of your ServiceNow interface to one of eight pre-set color schemes.



The **Forms Systems Settings Menu** allows you to specify how and when the related lists are displayed with forms.

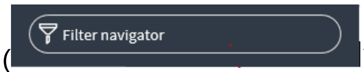
Tabbed forms: form sections and related lists appear in tabs when this setting is enabled.

Related List Loading: Related lists can load with the form, after the form loads, or only on demand. Typically we recommend using the “with the form” option.



Application Navigator

The **Application Navigator** makes use of filters and favorites to enhance your ability to find the information you are looking for.

Navigation Filter (

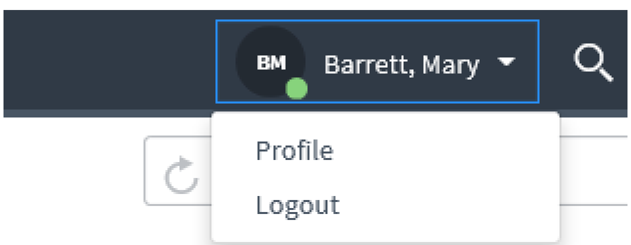
) filters the applications and modules that appear in the navigator based on the filter text

Favorites ( **)** displays favorite modules, or saved queries.

Note: *To increase or decrease font size on pages and menus in Fuji,* ***use the browser's*** *zoom controls*

Logging Out

In the upper right hand corner of the banner title line you will see your name. To log out click on the down arrow beside your name and select the logout option.

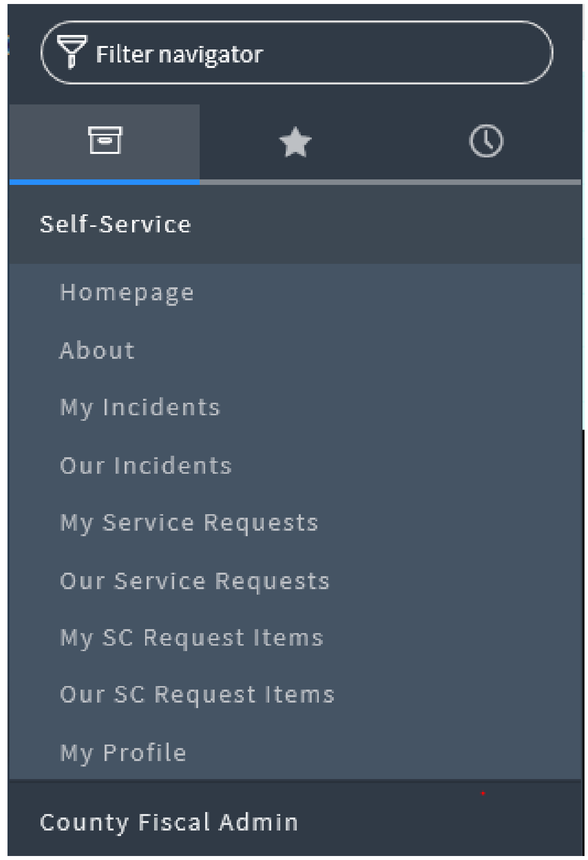


Self Service Module (under application menu)

In the Navigation Bar, click on the file box () to display the application menu.

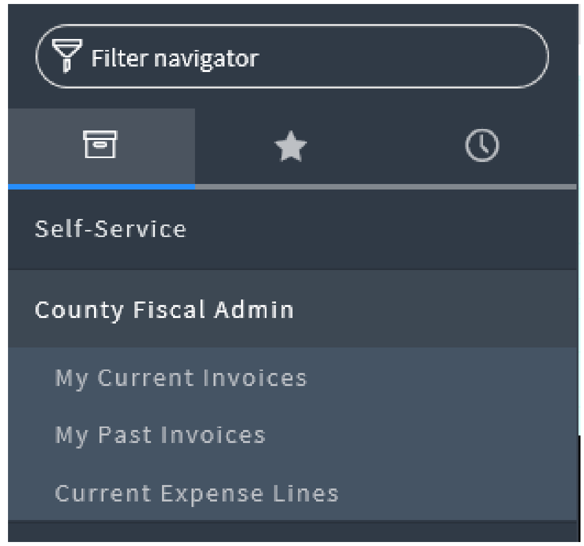
If you only see the title to the Self Service application click on the title to expand it.

The Self Service module has not been changed and we will not be reviewing the part of the Fiscal Customer's ServiceNow access.



County Fiscal Admin Module (under application menu)

In the Navigation Bar, click on the file box () to display the application menu.



If you only see the title to the County Fiscal Admin application click on the title to expand it.

My Current Invoices: all the invoices for my department or agency that ***were created THIS month***.

My Past Invoices: All the invoices for my department or agency created in ServiceNow in the past two years.

Invoices may be from IT Services or (moving forward) from GSA.

Current Expense Lines: Expense lines from ITSD or GSA that have ***not yet been invoiced***, and that have been marked by either ITSD or GSA for your review and possible correction of the following information:

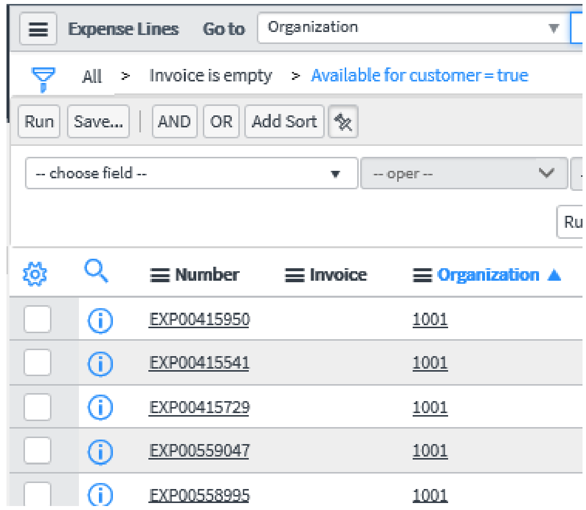
- Organization
- Customer Activity
- Customer Function
- Program
- Program Phase
- Task
- Object w Rollup

You have a relatively short time frame for review and correction. You may change any or all of the available fields – or there may be no corrections necessary.

Organizing Your Data Search

Click on the “Current Expense Lines” link in the County Fiscal Admin Module.

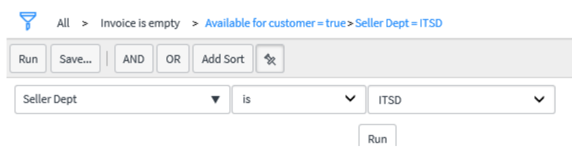
This is the list view – it presents the available expense lines in a tabular layout



If you click on the blue funnel () to the left of the table header you can specify a filter to change the data displayed in the table. Here are some useful filters:

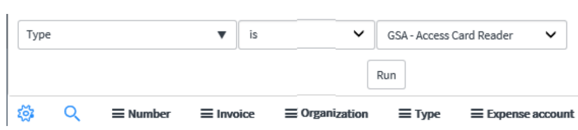
ITSD (or GSA) Expense Lines: filter for seller department is ITSD or GSA:

- Chose the field “seller dept”.
- Set the operator to “is”
- pick either “GSA” or “ITSD” for the value.
- Click on the “RUN” button.



The expense lines in the list will be filtered to match your criteria.

Expense Lines for a particular GSA Service: If you would like to review your expense lines by the service GSA provided, set up a filter similar to this:



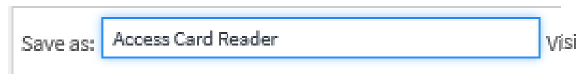
- Choose the field “Type”
- Set the operator to “is”
- Select one of the type options in the choice list
- Click on the “RUN” button

You can also use the operator “is one of” to specify multiple “types” for your list

Keeping the filter criteria visible at the top of the list view: By default your filter criteria is displayed above the list view as a series of "bread crumbs". If you wish to have the filter definition fields remain visible, click the push pin icon () above the filter definition area. This "pins" the filter definition fields and they no longer are hidden.

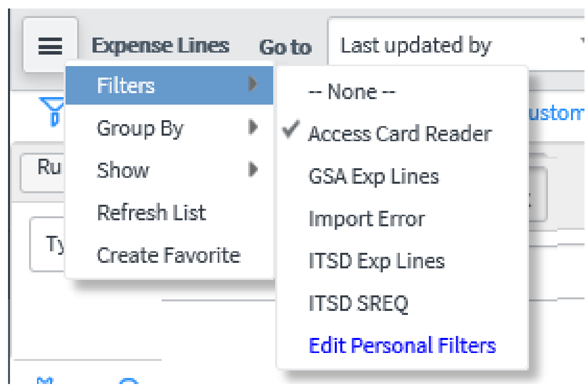
Saving a filter: If you define a filter that you find useful and you would like to have it available for your use at any time you can make it a stored filter.

- Click on the "Save" button above the filter criteria area
- A "Save as" field opens up and prompts you to give the filter a name
- Enter a name, and click the "Save" button to the right of the name field

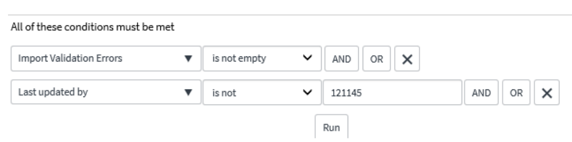


Using a stored filter: To retrieve a stored filter, click on the "hamburger" icon () to the upper left of your list view.

- Select the "Filters" option
- Click on the name of the filter you previously stored

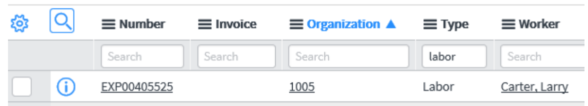


Expense lines with Customer Cost Accounting Errors: The GSA applications that track the services they provide are not able to validate the customer cost accounting codes requested by the customer. However, when that information is imported into ServiceNow those codes are validated against our Chart of Accounts and any invalid data results in an entry in the "Import Validation Errors" field on the expense lines. We recommend that you save a filter to find and address these records



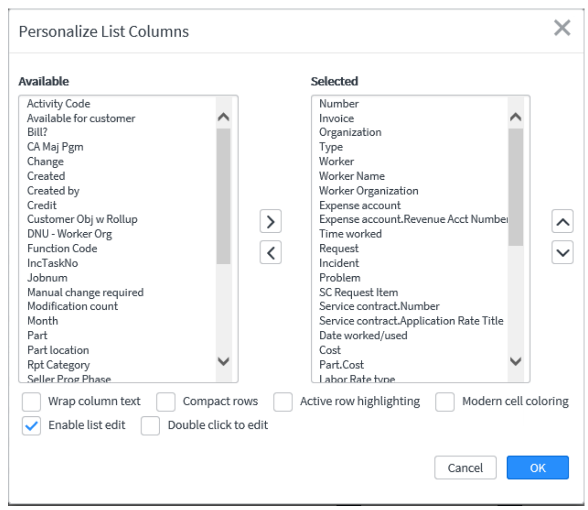
Note that I added a line to filter for records that you did not update yet. This makes it easier for you to focus on records that require your attention

Using the “search” fields above the column headings to filter your search: Another way to search is to click on the magnifying glass ( ) to the left of the column headings and enter the value you are looking for in search field that opens up above the column



- The search definition defaults to “starts with”
- Preceding the search criteria with an asterisk changes the operation to “contains”
- You can enter search values in multiple column search fields
- Complex searches are better handled using the filter search discussed previously.

Personalizing your list view layout: You can specify the order in which the fields appear in your list view. Click on the gear icon ( ) to the left of the column headings. This will open a pair a pair of field selection lists. In the right-hand (Selected) list use the up and down arrows to change the position of the fields in your list. You can move fields you are uninterested in to the left hand (Available) list and add new ones by selecting the field and clicking the left or right arrow between the two field selection lists. Be aware that we do not use every field that is defined in the underlying table so a field may not have data.

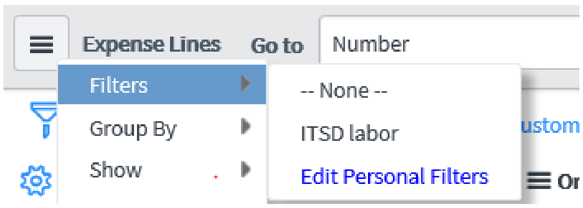


You can tell at a glance if you have personalized your list view. The gear icon to the left of the column headings will have a very small dot in place of one of the gears ( ). You can always return to the default list view by first clicking on the gear icon, and then on the “reset to column defaults” button that is now visible on the Personalized List Columns dialogue box.

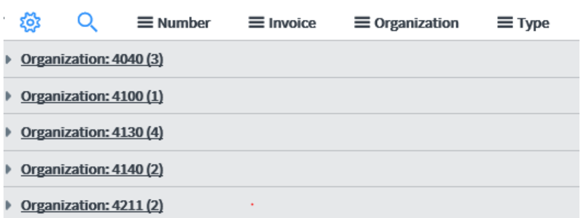
Changing the order of the rows: You can sort the list view in ascending or descending order by clicking on the column heading for the desired sort. You cannot do a multi-column sort in ServiceNow.

The "Hamburger" options: You have five options available to you when you click on the "Hamburger" icon ()

- **Filters –** this is where you can find the list of filters you have saved for future use

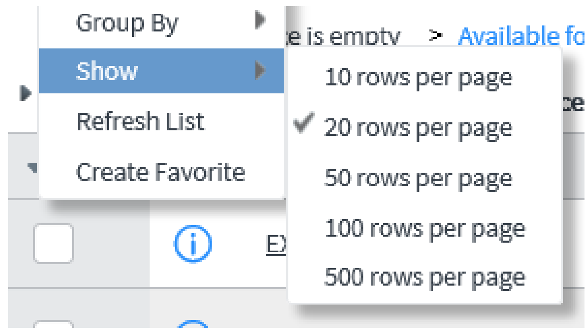


- **Group By –** you can elect to group your list view by any field present on this list. For example, group by customer organization would display the list in this fashion:

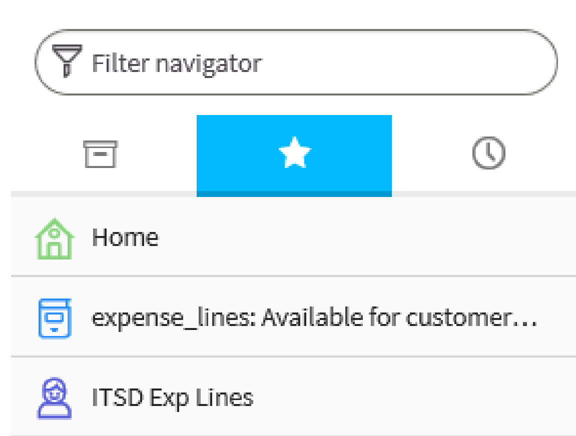


You will need to click on the triangle beside the group heading to display the records in that grouping

- **Show:** This menu option allows you to set the number of records displayed on a page. Your options are 10, 20, 50, 100 or 500. Your current election is checked. Too low a count means you spend a lot of time moving from page to page. Too high a count means it takes a while for the list to load. Most users find 20 to 100 to be suitable rows per page.

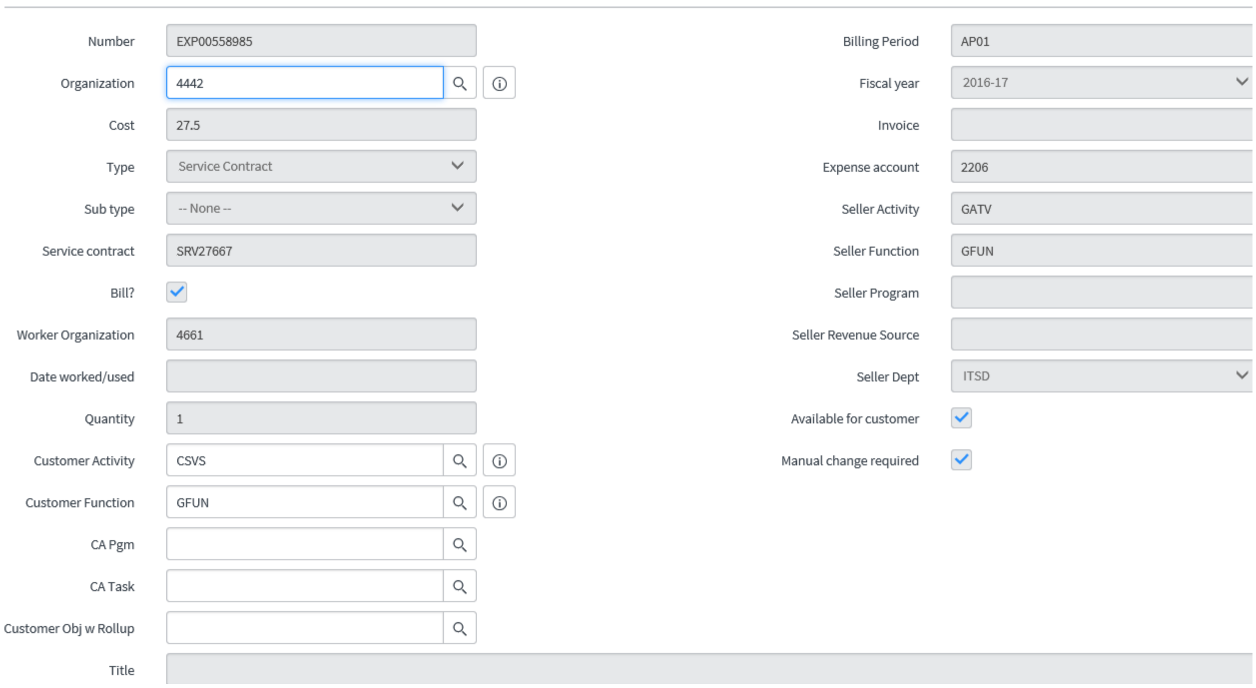


- **Refresh List:** Refreshing the list pulls in all records that meet the filter criteria.
- **Create Favorite:** If you have set up a stored filter you can run that filter and then use the "Create Favorite" option to save that filter to your Favorites tab. You can name the filter and specify an icon for it.



Correcting Cost Accounting Data on Expense Lines

You can only update information on expense lines in the form view (not the list view). To open a record in the form view, either click on the information icon ( ) to the left of the record in the list view, or click on the underlined Number in the first column (EXP00558985). This will open the record in the list view for you to review and edit as necessary.



The fields that are greyed out are read-only. The other fields are available for your input. You can only select values that are valid for your department, as defined in VCFMS.

You can change the organization (unit) that will be invoiced for this service, or any of the cost accounting. If you specify a program, and that program has phases identified for it in VCFMS, you will be required to select a phase before you can save the update.

You have two options for saving your update – “update” or “Save and Update Parent” (upper right hand corner of the form view).

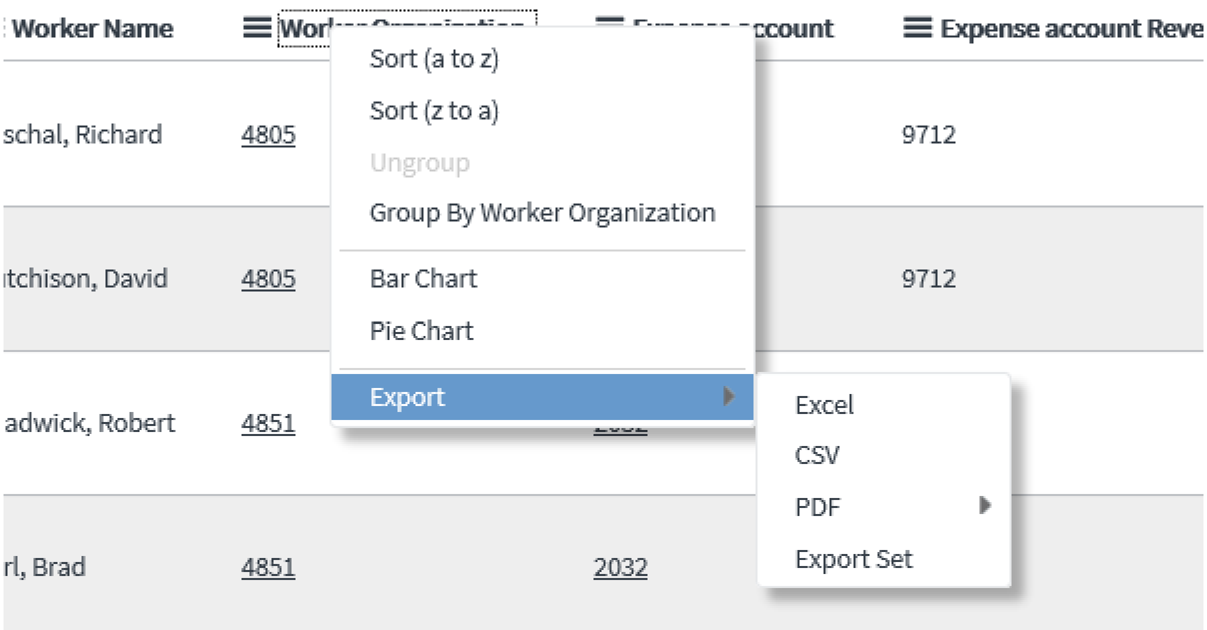
Update: The Update button saves the correction/update for the current record only.

Save and Update Parent: This save option does different things, depending on whether the expense line you are updating is an ITSD expense line or a GSA expense line.

- **ITSD expense line** – "Save and Update Parent" will correct the information on this expense line, plus it will find the ticket the labor or parts are linked to and correct that ticket. This in turn will update all other expense lines for labor/parts for that ticket that have not yet been invoiced.
- **GSA expense line** – "Save and Update Parent" will correct the information on this expense line, and will set a flag that a manual change needs to be made by GSA in the external system they use to manage this service.

Exporting Data to Excel and PDF

You can easily export the data in your list view by right clicking on the column header bar and selecting the Export option from the menu. You can then specify export to Excel, CSV, or PDF.



The data will then download locally and you will be prompted to save or open the file. However, this is not a two-way street. You do not have any ability to upload a corrected Excel file into ServiceNow. All corrections need to be performed in the Form View of the Current Expense Line module. It is also important to note that not every expense line that will be in an invoice will always be made available to customer review, so if you extract these expense lines they may not represent 100% of the charges to be invoiced.