Overview

Anyone at the DCRI can submit a ticket into ServiceNow to access a variety of services. This quick reference card (QRC) summarizes how a non-ITIL users create miscellaneous Request tickets.

An Incident or a Request?

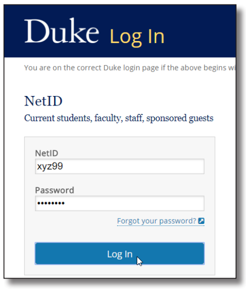
You fill out different forms for incidents and requests, so you must decide up front what you are asking the Service Desk to do.

- As the name implies, with a **Request** you ask for something you did not have or did not have access to.
- An **Incident** is a service issue (a loss of functionality with something you previously had access to).

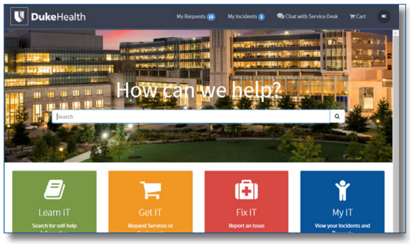
This QRC covers Requests only. For information on how to submit a miscellaneous *Incident*, see the ServiceNow: Creating an Incident QRC. If you need help from DCRI Facilities, there are specific instructions for that task in ServiceNow: Creating a Facilities Ticket QRC.

Opening the Duke Health IT Portal Page

1. On a modern browser, go to: **https://duke.service-now.com/**.
   The Duke Log In page appears.



2. Enter your **NetID** and network **Password**.
3. *If* prompted for multi-factor authentication, complete that task with your choice of authentication method.
4. Click **Log In**.
   The Duke Health IT Portal page opens.



Important! Notice the next three sections detail three different options to creating a Request from the Duke Health IT Portal.

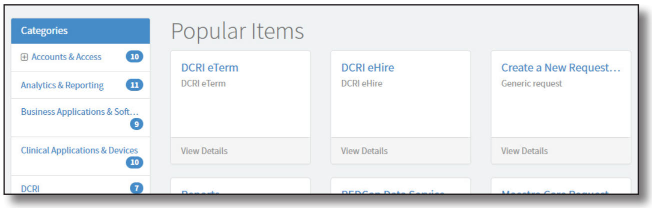
Option A: Completing a Request by Searching for the Service in the Catalog

In the Service Request Catalog, there are some hundred services available that, when you use the right form to suit your request, can simplify filling out the form *and* speed up ticket processing.

This is the preferred method of entering a Request. In fact, if you submit a generic Request that is covered by an option in the Service Request Catalog, it will likely be rejected.

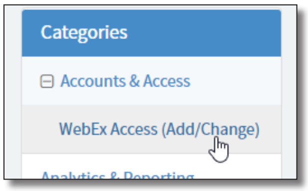
1. On the Duke Health IT Portal page, click the orange Get IT button.

   The first page of the Service Request Catalog appears. Under the slider image are categories of services on the left and *Popular Items* and services you marked as *Favorites*.



2. Do one of the following.
   - If the service you need appears on the right side of the page, click anywhere in its box and proceed to Step *5*.
   - If the service you need does not appear on the right side of the page, click anywhere on an option in the Category column that contains the service you need. Then, proceed to Step *3*.

   For example, to request access to WebEx, click the plus sign next to **Accounts & Access**. A sub-category of **WebEx Access (Add/ Change)** appears. Click the sub-category to see the services available for just WebEx.



3. Now the right side of the page shows on one or more pages all the services available to that Category or sub-category.
   - If the service you need appears on the right side of the page, click anywhere in its box and proceed to Step *5*.
   - If the service you need does not appear, simply click another Category or sub-category to open a different group of services.
4. If you cannot find what you are looking for, use the search box in the upper right corner.

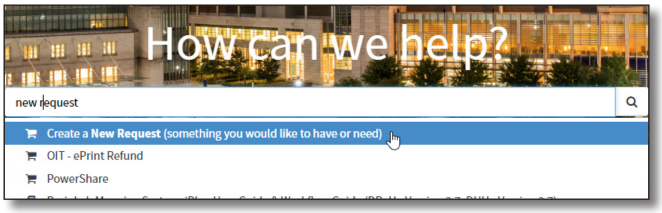
5. Since each form is different, we cannot address all the fields you might encounter. Adapt the information from “Option B: Completing a Generic Request” section for filling out and submitting the form you opened.

Option B: Completing a Generic Request

If you are new to ServiceNow, or cannot find a specific service for your request (Options B and C), then complete the following steps for creating a *generic* Request.

1 In the Search box on the Duke Health IT Portal page, enter **new request** (the search is *not* case sensitive).

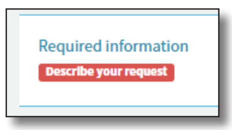
As you type, possible matches appear in a list.



2 Select **Create a New Request (something you would like to have or need)** when you see it.

In time, a Request form appears for you to fill out. Each mandatory field has a red asterisk *.

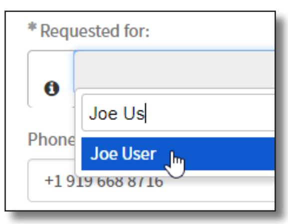
Tip: The Required Information box in the far right column quickly identifies required fields you have yet to complete. Click a red box and your cursor jumps to that field.

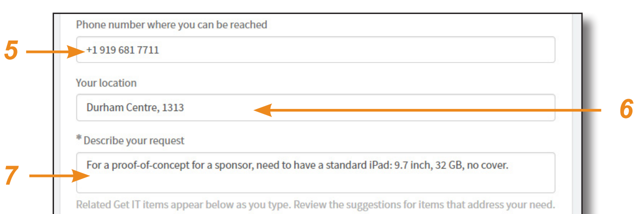


3 Verify your name in the **Requested for** field. If empty (or incorrect), click the drop-down arrow to enter your name.

As you type, possible matches appear in a list.

4 When you see your name, click it.





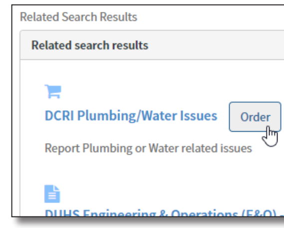
5 Verify or add the **Phone number where you can be reached**.

6 In **Your location**, include not only the *full* building name but also your cube/office number.

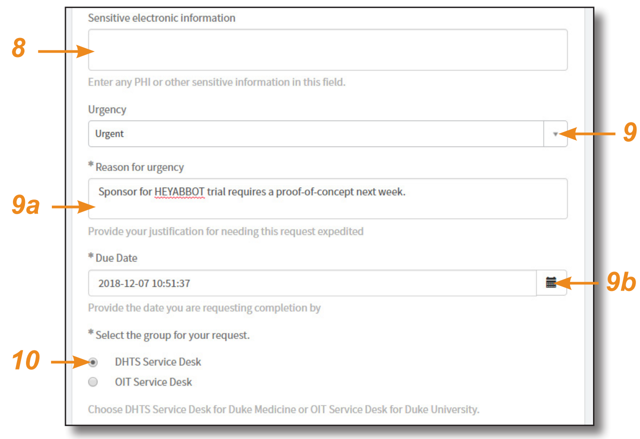
7 At **Describe your request**, enter what it is you need. Be as thorough as you can. The box expands, if necessary, to accommodate your text.

As you type, the system offers recommended forms that might better fit your request, based on the information you enter. These appear at the bottom of the page, in the **Related Search Results** section.

Tip: If the Related Search Results includes a Service Request Catalog item for DCRI, we recommend you open that up and enter your information on that form instead of a generic request.



8 If, for any reason, you have to enter PHI, DCRI proprietary data, or other sensitive information, enter that in the **Sensitive electronic information** box.



9 All Requests are treated in a *Normal* fashion unless you select **Urgent** in the **Urgency** field. If you select *Urgent*, two new fields appear:

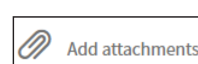
a In the **Reason for urgency** field that appears, you must enter justification for expediting your Request.

b In the **Due Date** field, identify when you need the request completed. Click the calendar icon to select a date from the online calendar.

10 Always select the **DHTS Service Desk** radio button.

11 You are encouraged to add one or more document or image files to the Request, when appropriate, to give agents more information up front. The maximum total upload per ticket is 1024MB. All commonly used file formats are supported.

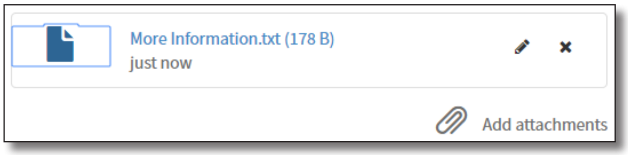
a Scroll to the bottom of the page to click **Add Attachments**.



An operating system dialog for selecting a file opens.

b Click the file you want.

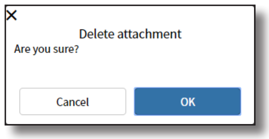
A new field appears with the file you uploaded. The elapsed time since the upload appears under the file name.



c To view the file, click the page icon on the left.

d To edit the file's name, click the edit icon on the right.

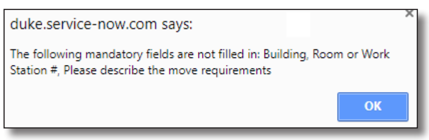
e To remove a file, click the ✖ icon to the right of the file name, and then click **OK** in the confirmation message.



f To add another file, repeat this procedure from Step *11a*.

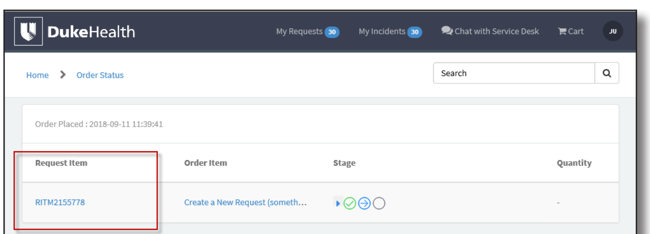
12 In the floating right column (or above the *Related Search Results* section), click Request Now.

If there were any required fields you did not complete, a warning message appears at the top.



To close the message, click **OK**. The incomplete fields are outlined in red. Complete the fields, and then click **Request Now** once more.

If you are successful, the Order Status page opens. Note the RITM number. You can close this page.



You also receive an email confirmation of your ticket with the RITM number included.

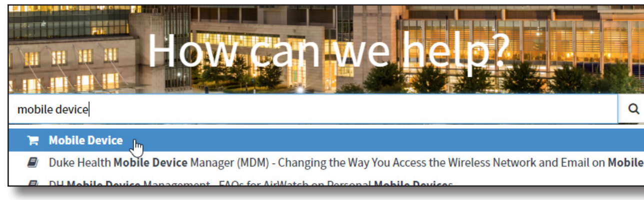
If you want, you can track activity on your Request—or other less-popular tasks such as change attachments, add a message, or change quantity. Details on how to complete all these tasks appear in the [ServiceNow: After you Submit a Ticket]() QRC.

Option C: Completing a Request by Search

You can search for the service you need in the Search box on the portal page. However, it is best to know the name of the service you need. Otherwise, your search can become trial and error.

1 On the Duke Health IT Portal page, start entering the name of the service you need. The search is *not* case sensitive.

As you type, possible matches appear in a list.



2 Select the name of the service when you see it.

Tip: Items in the Service Request Catalog always have the icon of a shopping cart.

In time, a Request form for the service you selected appears for you to fill out.

3 Since each form is different, we cannot address all fields you might encounter. Adapt the information from "Option B: Completing a Generic Request" section for filling out and submitting the form you opened.

Logging Out

1 On any page, go to the black bar running across the top to click the log out icon at the extreme right end.

The Duke Log Out page appears.

2 Click **Log out**.

3 Close the browser tab.

Getting Help

To quickly reach the ServiceNow Learning Center, search on any Pulse page for **ServiceNow Learning**, and then click the **ServiceNow Learning Center** link. Or, point your browser to:
https://dcrihome.dcri.org/IT/Pages/LearningCenters/sn.aspx

If you have questions or comments about the content of this QRC, please email [Technology Training]() [**dcriittrain@dm.duke.edu**]. If you experience any technical problems working with Requests in ServiceNow you are unable to resolve, email the [Research Service Desk]() [**dcriservicedesk@duke.edu**], formerly known as the DCRI Service Desk. Or, for time-sensitive issues, call them Monday through Friday (6 a.m. to midnight, Eastern time, except holidays) at 919.668.8916.