Requesting Help in ServiceNow and working with OSR Help

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Just curious:

How many of you have submitted a request in ServiceNow?
Benefits You’ll Notice

**Enhanced User Experience.** A modern interface that makes it easy to search for information that you need – and to submit support tickets when you can’t find answers.

**Better and Faster Support.** The platform routes cases to the right people as quickly as possible with intelligent recommendations that automatically assign work based on skills, location and availability.

**Full Transparency.** Easily view what requests you’ve submitted, who is working to find a solution and where the ticket is in the workflow process.
Submit a Request
Two Types of Tickets

Something’s Broken

• I keep hearing feedback when I join Zoom calls.
• When I use Firefox, I don’t see drop-down menus in ConnectCarolina.
• The printer in the break room is jammed.

Request Service

• I need to have a telephone connected.
• I need a new chartfield string.
• I don’t know how to use Zoom web conferencing. Can you help?
You no longer need to know where to route tickets.

You set an urgency (high, medium, low) and the fulfiller does too. The system calculates the Priority.
Each service request looks a little different

Service requests don’t have an Urgency assigned

Office 365 Support

Request Office 365 Support

To request training and support for Office 365 related products and service, please complete the form below.

- Requested for
  - Anita Collins
  - Requested for not in directory

- Requested for department
  - ITS - EA-Connect Carolina

- Office 365 Application
  - -- None --

Description
Tips for Getting Help

• All “Something’s Broken” tickets go to the ITS Service Desk first. Being as descriptive as you can helps your ticket get to the right place quickly.

• If it’s a service, search for it—it’s faster than using the categories.

• Search results show both knowledge articles and services.

• If you don’t see a service that matches what you are looking for, choose “Request Something Else.”

• A ServiceNow quirk: Some service requests say “Approved” as soon as you submit them. That just means it’s ready for the next step of the process, not that what you're asking for has been approved.
Check the Status of Your Requests
How can we help you?

Search our knowledge articles

Log in to view all knowledge articles, requests, and services.

ITS System Status

- Partially Degraded Service
- View System Status and History

Something's Broken

Contact the Service Desk to report an issue or ask a question.
- Chat Now
- Walk-in
- Call 919-962-help

Request Service

Browse our services to request things like a shared mailbox, software, or a Sakai site.

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Request Service

Comments / Feedback  |  Accessibility
<table>
<thead>
<tr>
<th>Request ID</th>
<th>Status</th>
<th>View</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>INC0018694</td>
<td>In Progress</td>
<td>Open</td>
<td>1m ago</td>
</tr>
<tr>
<td></td>
<td>CCInfo.unc.edu: the link to the webinar recording from last Friday isn't working for me</td>
<td></td>
<td></td>
</tr>
<tr>
<td>INC0018663</td>
<td>In Progress</td>
<td></td>
<td>37m ago</td>
</tr>
<tr>
<td></td>
<td>Broken link on ccinfo.unc.edu</td>
<td></td>
<td></td>
</tr>
<tr>
<td>REQ0013195</td>
<td>Open</td>
<td></td>
<td>23h ago</td>
</tr>
<tr>
<td></td>
<td>ServiceNow</td>
<td></td>
<td></td>
</tr>
<tr>
<td>REQ0012250</td>
<td>Open</td>
<td></td>
<td>6d ago</td>
</tr>
<tr>
<td></td>
<td>ServiceNow</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
CCInfo.unc.edu: the link to the webinar recording from last Friday isn't working for me.

Can you please try clearing your cache and use this link: XXXXXXXX

Ellen Pautler

Agent working on this Incident: Ellen Pautler

Incident Number: INC0018694
State: In Progress
Priority: 4 - Low
Created: 4m ago
Updated: 2m ago

Ellen Pautler

Anita Collins

Start
Working with OSR Help
How OSR Help assists with requests hasn't changed, only how you send the request to OSR. Before it was email, now it's ServiceNow.

• Emailing OSRHelp@unc.edu no longer creates Help/Remedy tickets.

• OSR Help Team still monitors the inbox to:
  o Troubleshoot submitting help requests in ServiceNow
  o Provide ticket/request status updates

• Ensure OSR Help receives your email. **Check the address before sending!**

✅ OSRHelp@unc.edu  ❌ VCREO_OSRhelp  VCREO_OSRhelp.dg
Incident or Service Request?

• Majority of OSR Help requests are **Incidents**

• Examples of **common** Incidents:
  • **Budget Overrides** for Journals, Vouchers
  • F&A Expense Adjustments
  • Project Status Change for POs/Reqs
  • Correcting JEs not available to campus

• Examples of **uncommon** Incidents:
  • Chartfield Correction in Activity Type

Something's Broken

Contact the Service Desk to report an issue or ask a question.

• Call 919-962-help
• Chat Now
• View walk-in hours
• Most **common** Service Request:
  • Specialized reports or data from RAMSeS or ConnectCarolina

• Incidents normally take 1 business day to resolve

• Service request times vary greatly depending on the type of request or report.
New help guidance is on the OSR Website to assist you with submitting concise ServiceNow requests to OSR.

It will also help you determine when a request should be emailed to ResAdminOSR.

**OSR Forms and Tools**

- Budgeting
- Prior Approvals & Waiver Requests
- Proposal Related Forms and Tools
- Cash Advance
- Other Research Related
- ServiceNow for OSR Help
<table>
<thead>
<tr>
<th>Award/Project Requests</th>
<th>Description</th>
<th>Submission Tips</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indirect/F&amp;A Exemptions</td>
<td>F&amp;A expenses (indirects) need to be excluded from certain budget account codes (an F&amp;A expense adjustment may also be needed).</td>
<td>Include PS Project ID, attachments that clarify exceptions and/or relevant communications describing the issue.</td>
</tr>
<tr>
<td>Indirect/F&amp;A Expense Adjustment</td>
<td>F&amp;A expenses (indirects) have not calculated according to the awarded rate and an adjustment is needed.</td>
<td>Include PS Project ID (more common for projects that converted from FRS to ConnectCarolina).</td>
</tr>
<tr>
<td>Project Status</td>
<td>Project Status update needed to process transaction (journal, voucher, requisition, PO).</td>
<td>Include PS Project ID, transaction ID (if available) and any documentation and/or communication with an OSR Sponsored Projects Accountant or Sponsored Projects Specialist.</td>
</tr>
<tr>
<td>Residuals</td>
<td>Request for the Residual balance to process a JSR journal (OSR Residual Fund Balance). For budget errors in the journal, see Budget Error Override Requests.</td>
<td>Include PS Project ID, Transaction ID (if available).</td>
</tr>
</tbody>
</table>

<table>
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<tr>
<th>Expense/Reporting Requests</th>
<th>Description</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Budget Overview</td>
<td>Project Information in Budget Overview doesn't match InfoPorte.</td>
<td>Often times this a lag in the system update from ConnectCarolina to InfoPorte, but include the PS Project ID and any screenshots and/or documentation.</td>
</tr>
<tr>
<td>Chartfield Changes</td>
<td>Requests for chartfield changes such as: Fund, Source, *Account Code, Dept, Cost Code, or Program.</td>
<td>Include the PS Project ID and any relevant transaction IDs that require chartfield corrections.</td>
</tr>
<tr>
<td>Budget Error Override Requests</td>
<td>Journals, Vouchers, Requisitions, POs</td>
<td>Submission Tips</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>--------------------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Budget Date Out of Bounds</td>
<td>Error occurs because budget end date has passed for the project.</td>
<td>Include transaction ID and if the project is past the KK end date, include communication or approval from an OSR Sponsored Projects Accountant.</td>
</tr>
<tr>
<td>Exceeds Budget Tolerance</td>
<td>Error occurs because the project or budget account is overspent.</td>
<td>Include transaction ID and communication and/or documentation about additional funding (or approval from an OSR Sponsored Projects Specialist) or approval from an OSR Sponsored Projects Accountant if the total award/contract is not overspent.</td>
</tr>
<tr>
<td>No Budget Exists</td>
<td>Error occurs for various reason, the foremost being an incorrect Chartfield string used.</td>
<td>If the Chartfield in the transaction ID is accurate, include the PS Project ID and transaction in your request – this type of override request may take a little longer to resolve than Budget Date Out of Bounds or Exceeds Budget Tolerance. If no Budget Account is available, a budget revision (link) will need to be processed and that is a request for <a href="mailto:ResAdminOSR@unc.edu">ResAdminOSR@unc.edu</a>.</td>
</tr>
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</table>

**Request that should be submitted to ResAdminOSR@unc.edu.**

<table>
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</tr>
</thead>
<tbody>
<tr>
<td>Budget Revisions</td>
<td>A budget update/revision is needed.</td>
<td>Submit Budget Revision form (link).</td>
</tr>
<tr>
<td>Budget/Project End Date Change</td>
<td>The budget and/or project period end dates are not correct in RAMSeS and/or ConnectCarolina.</td>
<td>Include the PS Project ID and any attachments that show the correct end dates and describe the system to update. An OSR Sponsored Projects Specialist will review and make the correction.</td>
</tr>
</tbody>
</table>
We're here to help!

Reach out to OSRHelp@unc.edu if you need assistance on a project. If we can't provide the direct assist, we will point you in the direction who/what can.
Q & A