



Brazil Service Management

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Service Management

Service Management (SM) refers to the ServiceNow service management applications you install, such as Facilities Service Management. Each of these applications allow you to manage business functions that require a request-type workflow where requests are approved, qualified, assigned, and completed.

Activate Service Management

The Service Management Core plugin is activated automatically when you activate any service management application.

Before you begin

Role required: admin

About this task

For information on subscribing to a service management application, see .

The Service Management Core plugin also activates the following plugins if they are not already active.

- Automatic Assignment
- Asset Management
- Process Flow Formatter
- State Flows
- Knowledge Management V3
- Skills Management
- Territory Management
- Managed documents
- Task Activities
- Service Management Geolocation
- Encryption Support
- Workbench
- Checklist

Related topics

[Process flow formatter](#) 

[State flows](#) 

[Managed Documents](#) 

Activate other Service Management applications

After the Service Management Core plugin has been activated, you can activate other SM applications, such as Field Service management and facilities service management. You can also activate CMS portals for each of these SM applications to add them to the Service Management Portal.

Other SM plugins to activate

Plugin	ID	Description
Facilities Service Management	com.snc.facilities.core	<p>Manages facilities requests and enables users to report and track requests by their location on a floor plan. Activation of this plugin on production instances may require a separate license. Contact ServiceNow for details.</p> <p>Facilities Service Management is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported until deprecation. Workplace Service Delivery provides the latest experience for this functionality. For details, see the KB0867184 Deprecation Process article in the Now Support knowledge base.</p>
Facilities Service Management CMS Portal	com.snc.facilities.core.cms	Displays the Facilities Service Automation SM application on the Service Management portal. Activation of this plugin on production instances may require a separate license. Contact ServiceNow for details.
Field Service Management	com.snc.work_management	Provides support for scheduling and managing on location work.
Field Service Management CMS Portal	com.snc.work_management.cms	Displays the Work Management SM application on the Service Management portal. Activation of this plugin on production instances may require a separate license. Contact ServiceNow for details.
Finance Service Management	com.snc.finance_service_automation	Deprecated Feb 1, 2023.
Finance Service Management CMS Portal	com.snc.finance_service_automation.cms	Displays the Finance Service Automation SM application on the Service Management portal. Activation of this plugin on production instances may require a separate license. Contact ServiceNow for details.

Other SM plugins to activate (continued)

Plugin	ID	Description
HR Service Delivery: Core	com.snc.hr.core	Provides a basic data and security model for HR systems.
HR Service Delivery: Core CMS Portal	com.snc.hr.core.cms	Displays the Human Resources Service Automation SM application on the Service Management portal. Activation of this plugin on production instances may require a separate license. Contact ServiceNow for details.
Legal Service Management	com.snc.legal_service_automation	Deprecated Feb 1, 2023.
Legal Service Management CMS Portal	com.snc.legal_service_automation.cms	Displays the Legal Service Automation SM application on the Service Management portal. Activation of this plugin on production instances may require a separate license. Contact ServiceNow for details.
Marketing Service Management	com.snc.marketing_service_automation	Deprecated Feb 1, 2023.
Marketing Service Management CMS Portal	com.snc.marketing_service_automation.cms	Displays the Marketing Service Automation SM application on the Service Management portal. Activation of this plugin on production instances may require a separate license. Contact ServiceNow for details.

Service management states

From creation until closure, SM application requests for work (for example, work orders and facilities requests), and their respective tasks follow a life cycle tracked by the **State** field in Field Service Management and Facilities Service Management.

The life cycle is controlled through business rules and UI actions that are updated by the system automatically.

Note: The **State** field on the record is always read-only.

Related topics

[Customize a state flow](#)

State flow customization

State flows control the sequence in which records transition between states in Service Management applications.

An administrator can perform the following tasks:

- Add or delete states.
- Trigger events on particular state transitions.
- Transition to another state automatically when data in a request or its task changes, or change states manually when the user clicks a button.
- Limit the choice list for the State field to those end states that are valid transitions from the given start state.
- Control the visibility and behavior of selected fields on a target table when records in that table change states.
- Create custom state flows. Turn off the **State flows are enabled** option on the configuration screen. Creating custom state flows requires scripting knowledge.

Note: Users with the `wm_admin` role can create, read, update, and delete only work order flows and work task flows. Users with the `facilities_admin` role can create, read, update, and delete only facilities request flows and request task flows. Users with the `wm_admin` role cannot manipulate facilities records, and users with the `facilities_admin` role cannot manipulate work order records.

How SM request and task state flows work

State flows replace the standard process that controls how requests and their associated tasks move between states. The ServiceNow system creates business rules, client scripts, and UI actions that perform the transitions and field controls you specify. These programming elements remain in use while the state flow records that use them are present. When state flows on an SM application table are deleted, the system attempts to delete any unnecessary programming elements that were created on that table. You can limit the selections for the State field to valid states for the transition, based on the starting state.

State flows provide the following controls:

- **Manual transitions:** A UI action, created automatically by the system when you provide a condition or a script, initiates a transition.
- **Automatic transitions:** A business rule, created automatically by the system when you provide a condition and a script, initiates a transition when changes are made to a request or task.

Features available with state flows

- **Custom transitions:** Customize the order in which states can change for requests and task records.
- **Field controls:** Control the behavior and visibility of specific fields when a task changes states or reaches a specified end state.
- **State choice list:** Limit the values offered in a task record State field to valid states for that transition. This is the same client script that the system creates to manage field controls for state transitions.
- **Events:** Trigger events when a state transition occurs or when a record reaches a specific end state.

Start and end states

You can create a custom state flow for processing that must occur when a task record makes a specific transition from one state to another. These records require a starting state and an ending state, and processing occurs during the transition between states. To perform some processing when a task record reaches a particular end state, you only need to define the end state. In some cases a state flow can have a starting state only, such as when you need to perform some type of cleanup after a task is canceled. A state flow might have no starting or ending state if the processing in the record applies to more than one state transition.

The solution is to store the business rule or client script in a state flow record and create a condition to trigger processing for any state change that requires it. An example of this in field service management is the Roll Up Changes business rule on the Work Order Task [wm_task] table. This business rule rolls up state changes that occur in tasks to the parent work order.

State flow dictionary overrides

A dictionary override in a state flow defines the starting state for all new records in a specific table. You set an override in tables that extend a base table only, so that your customizations are applied only to the extended table.

Before you begin

Role required: admin

Procedure

1. In a state flow record, select an **Ending state**.

This is the override value which becomes the starting state for all new records in the table named.

2. Click **Create Default Value**.

The system populates the **Dictionary override** field with a value of state, which is the field in the task table affected by the override. The Dictionary override field is read-only. After the override is created, the system hides the **Create Default Value** button on all subsequent state flow forms for that table.

Work notes in state flows

Work notes are an important part of the state flow process and are used to communicate information about state transitions.

The state flow adds work notes into the **Work notes** field of any task making this transition. For example, you might include the note, "Task rejected by agent" in the **Reject** state flow, which occurs when the task moves from **Assigned** to **Pending Dispatch**. If an agent rejects the task and fails to enter a work note, this note tells the dispatcher why the task reappeared in the dispatch queue. Work notes added by an agent rejecting the task are appended to the work notes that are inherited from the state flow.

These rules apply to state flow work notes:

- For a state flow with no **Starting state**, the work note is added every time the task transitions to the **Ending state**.
- For a state flow with a **Starting state** and an **Ending state**, the work note is added only when the task transitions from that starting state to that ending state.
- If two state flows with work notes have the same **Ending state**, but only one has a **Starting state**, the system adds the work notes from the state flow with the starting state. This better matches the state flow work note to the more important transition between specific starting

and ending states. In the example here, the work note information is more pertinent to a task moving from **Assigned** to **Pending Dispatch** than to a task that reaches the Pending Dispatch state from an undetermined beginning state.

Related topics

[State flow customization](#)

[Request states](#)

[Request task states](#)

Field controls in state flows

You can define controls for individual fields that are enforced when a record transitions between states.

Settings in the Field Controls section of the State Flow form enable you to apply field controls when the system detects a specified state transition or when the end state is the current state when the form is opened. The control is applied only to existing fields on the form. State flows cannot add fields to the form.

For example, you might want the **Problem** field to be visible when an incident moves to the **Awaiting Problem** state. If the incident state changes to **Awaiting User Info**, you hide the **Problem** field and make the **Caller** field mandatory.

Configure state flow records with an ending state only and create the correct behavior for every ending state you want to control. This ensures that the field controls are set properly when the user selects a new state, and also when the user returns a record's **State** field to the original state. Only specify a full state transition, with both a starting and ending state, when you want a particular behavior for that precise state transition.

Note: State flows use client scripts to enforce field controls. It is possible that your settings can be changed by existing UI policies, which execute after client scripts.

Related topics

[Request states](#)

[Request task states](#)

Trigger events on state changes

You can configure a state flow to trigger a registered system event when a task transitions from a starting state to a specified end state. For example, you can use events to trigger email notifications and create script actions.

Before you begin

Role required: admin

About this task

You can configure a state flow to trigger a registered system event when a task transitions from a starting state to a specified end state. For example, you can use events to trigger email notifications and create script actions. When you attach an event to a state flow, the ServiceNow system creates a business rule called **State Flow Events for <table name>** for the table specified in the state flow. If you specify a start and end state, the business rule executes when the record transitions from the start state to the end state. If the state flow only specifies an end state, the business rule executes whenever that end state is reached. The system creates one business rule for all state flows containing events on a single table. When all events or all state flows on a table are deleted, the system deletes the business rule.

To create an event that fires when a work order task moves from a starting state of **Work in Progress** to an end state of **Closed Complete**:

Procedure

1. Register a new event on the Work Order Task [wm_task] table called `task.closed`.
2. Navigate to **State Flows Work Task Flows**.
3. Open the state flow record **Close Complete**.
4. Select `task.closed` in the **Event** field and save your changes.

The ServiceNow system automatically creates a business rule called **State Flow Events for wm_task**.

Rebuild state flows

You can rebuild state flows when a mismatch between existing and new sys_ids occurs.

When you use an XML file to import a state flow record into an instance, the system attempts to match the incoming states with existing states by comparing sys_ids. Because the sys_ids of items in a choice list can vary between instances, the system can fail to match the states, even though they are otherwise identical.

When matching fails, the start and end states of affected records are left blank or contain numeric values. To repair these records navigate to **State Flows > Admin > Rebuild State Flows**. This module runs a script that compares the numerical value of each item in the **State** field choice list until it finds a match in the imported state flow record.

State flow cleanup

The business rules, client scripts, and UI actions that the system creates automatically to perform custom transitions exist only while the state flow records that use them are present.

When all the state flows on a table are deleted, the system attempts to delete any unnecessary programming elements that were created on that table, using these criteria:

State flow Cleanup

Element	Deleted When
<ul style="list-style-type: none"> • UI action • Business rule • Dictionary override 	The state flow that created it is deleted.
Business rule that processes events triggered by a state flow	All state flows for the table specified that have events configured are deleted.
Client script (onLoad)	All state flows for the table are deleted.
Client script (onChange)	All state flows with field controls are deleted.
Work notes business rule	All state flows with field controls or work notes are deleted

Related topics[State flow customization](#)[Request states](#)[Request task states](#)**State flow example**

Your business processes might require work order tasks to be accepted automatically when dispatched to an agent.

Before you begin

Role required: admin

About this task

Create a new state flow record that automates the transition from Pending Dispatch to Accepted and bypasses the Assigned state in which agents can reject tasks. This prevents the system from running the manual script associated with UI actions. The automatic script performs the jobs that the manual script performed, such as updating the date and time the task was dispatched, or to do additional work such as sending a notification.

Procedure

1. Navigate to **All > Field Service > State Flows > Work Task Flows**.

2. Open the **Assigned** record that defines a task transition from a starting state of **Pending Dispatch** to an ending state of **Assigned**.

This is an automatic state change that occurs when an agent's name is added to the Assigned to field and the task is updated.

3. Change the name of the state flow.

In this example, change the name to **Skip Agent Acceptance**.

4. Change the value in the **Ending state** field to **Accepted**.

This transition allows you to bypass the **Accept** state flow record that enables agents to reject tasks.

5. Set up the condition criteria in the following fields:

- **Automatic condition string:** This condition ensures that the current state is at **Pending Dispatch** and the value in the **Assigned to** field changes. For example, `current.state == 10 && current.assigned_to.changes()`.
- **Automatic condition:** The condition **[Assigned to] [is not empty]** ensures that all dispatched tasks are accepted automatically.
- **Automatic script:** The automatic script sets the time the task was dispatched. For example, use method: `current.dispatched_on = gs.nowDateTime()`.

Note: The previous two condition statements have an **[and]** relationship. In this example, the business rule runs when a task in a state of **Pending Dispatch** is assigned to any agent.

6. Copy the record using the **Insert and Stay** command.

This action increments the record number and clears the **Business rule** field. The system automatically creates a new business rule, using the name of the new state flow record. The Skip Agent Acceptance business rule moves the task from **Pending Dispatch** to **Accepted** automatically when a dispatcher enters a user name in the **Assigned to** field. Note that any changes you make to this state flow record in the future are executed by this business rule.

7. Ensure that the **Active** check box is selected.

8. In the Work Task Flows list, locate the **Accept** state flow record and change the **Active** status to **false**.

This action deactivates the transition that allows agents to accept tasks and moves the state flow directly from **Pending Dispatch** to **Accepted**.

Implications of disabling SM state flows

State flows are used by SM applications to control how a work order or request automatically transitions from one state to the next. When state flows are disabled, various aspects of the ServiceNow system are also changed, as described here.

Review the following implications before setting the **Enable state flows** configuration option to **Off**. After the configuration is saved, state flows cannot be re-enabled from the user interface.

When state flows are disabled, the state transition-related behavior of the following business rules, UI actions, and security rules are affected.

- **Business rules on requests:**

- Group change validation
- Move tasks to pending assignment
- Request-driven dispatch
- Unassigned
- Verify work notes

- **Business rules on tasks:**

- Apply dispatch method
- Populate schedule
- Populate schedule - new SOT (service order task)
- Transitions
- Unassigned

- **The following business rules run partially:**

- The part of **Build scratchpad and display info messages** that shows an error message if a task is pending dispatch and auto-assignment fails is disabled.
- For the **Validate changes** business rule, the only part that runs is when the system checks for work notes and rolls them up.

- **UI actions on requests:**

- When the **Spam** button on the request form is clicked, the state is not changed, but the work notes indicate that the request was closed as spam.

- **UI actions on tasks:**

- Assign to me
- View task on map
- New
- **Security rules:**
 - State-based aspects of security rules no longer apply. For example, when state flows are enabled, the **Short description** field is not editable when a request or task is closed complete, incomplete, or canceled. When state flows are disabled, the **Short description** is always editable.
 - Role-based aspects of security rules continue to apply when state flows are disabled.
- **Additional changes when state flows are disabled:**
 - The process flow formatter is removed from request and task forms.
 - The **State** field can be edited on request and task forms.
 - The following configuration fields are changed:
 - **Process lifecycle** is set to **request-driven**.
 - **Assignment method for requests** is set to **manual**.
 - **Assignment method for tasks** is set to **manual**.
 - **Approval for new request required** is disabled.
 - **Qualification is required for new requests** is disabled.
 - **Agent must accept or reject the assigned task** is disabled.
 - **Use dispatch queue** is disabled.

Re-enable state flows

When service management state flows have been disabled, they cannot be re-enabled from the user interface.

About this task

State flows can, however, be re-enabled by running a script for each service management application.

Procedure

For each service management application, run the following script:

```
var now_GR = new GlideRecord('sm_config');
gr.get('name', '{YOUR_APP_NAME}'); //this can be looked up by
navigating to
the sm_config list
gr.use_sf = true;
gr.update();
```

Service Management Core installation reference

Service Management Core includes several feature plugins. Each of these plugins installs several types of components in support of the service management process.

Installed with Service Management Core

Several types of components are installed with the Service Management Core plugin.

Demo data is available with Service Management Core.

Tables installed with Service Management Core

Tables are added with Service Management Core.

Table	Description
Part Requirement [cmdb_model_part_requirement]	Defines a relationship between a service order task and an asset (part) required to complete this task.
Service Order Model [cmdb_serviceorder_product_model]	Stores service order templates.
Service Task Model [cmdb_servicetask_product_model]	Stores service task templates.
Service Management Flow [sf_state_flow]	State flows for Service Management.
Service Order Flow [sf_sm_order]	State flows for service orders.
Service Task Flow [sf_sm_task]	State flows for service order tasks.
Asset Usage [sm_asset_usage]	Defines relationship between a service order task and the assets used to complete this task.
SM Category [sm_category]	Links a single service order template to a service order category value.
SM Config Module [sm_config_module]	Links a configuration to a set of navigation modules that are shown or hidden based on configuration settings.
SM Config [sm_config]	Service management application configuration.
Service Management Incidentals [sm_incidentals]	Incidental items used to complete a service order task.
Service Order Groups Dependency [sm_m2m_group_dependency]	Dispatch groups that handle scheduling for assignment groups.

Table	Description
SM Model Application [sm_m2m_model_application]	Links SM applications to hardware and consumable models often used in part sourcing.
SM Model Knowledge [sm_m2m_model_knowledge]	Relates any knowledge page to any model.
Affected CI [sm_m2m_order_affected_ci]	Configuration items related to a service order.
Service Order Task Models [sm_m2m_somodel_stmodel]	Links service task models to service order models.
Task Affected CI [sm_m2m_task_affected_ci]	Configuration items related to a service order task.
Service Order Task Contract [sm_m2m_task_contract]	Defines a relationship between a task and contract.
Service Order Task Dependency [sm_m2m_task_dependency]	Defines a dependency between two service order tasks: downstream task cannot be started before upstream task gets completed.
Service Order Task Template Dependency [sm_m2m_task_template_dependency]	Defines a dependency between two service order task templates: downstream task cannot be started before upstream task gets completed.
SM Notification Rule [sm_notification_rule]	Service management notification rules.
Service Order [sm_order]	Defines and manages work that needs to be performed.
Part Requirement [sm_part_requirement]	Defines a relationship between a service order task and an asset (part) required to complete this task.
Service Task [sm_task]	Unit of work performed by one person in one session (one location, one time).
SM Template Definition [sm_template_definition]	Defines a field and value that will be included in a service order template.
Task Asset [task_asset]	Assets related to a task.

Properties installed with Service Management Core

Properties are added with Service Management Core.

Property	Description
Properties for service management core	
sm.template.minute.step	Default minute step for date time or time fields on service order template page. Can be overridden for a specific application by replacing "sm.template" with the appropriate property prefix. See application configuration record.
sm.template.hour.step	Default hour step for date time or time fields on service order template page. Can be overridden for a specific application by replacing "sm.template" with the appropriate property prefix. See application configuration record.
glide.autodispatch.debug	Whether auto dispatch engine should output logs when assigning tasks.

Roles installed with Service Management Core

Roles are added with Service Management Core.

Role title [name]	Description
personalize_read_dictionary	Role allowing service management application admins the ability to see fields when modifying field controls (for example, mandatory fields, read-only fields) on the state flow form.
sm_qualifier	Qualifier role used when creating SM applications. This role is a template only and it does not provide actual access to any navigation modules or records.
sm_agent	Agent role used when creating SM applications. Performs work on a task. This role is a template only and it does not provide actual access to any navigation modules or records.
sm_approver_user	Approver user role used when creating SM application. Approves requests. This role is a template only and it does not provide actual access to any navigation modules or records
sm_initiator	Initiator user role used when creating SM application. Grants UI access, as well as performing the same functions as Basic. This role is a template only and it does not provide actual access to any navigation modules or records.
service_fulfiller	Role allowing service management users the ability to see the Service Desk modules.
sm_admin	Admin user role used when creating SM application. Controls all data. This role is a template only and it does not provide actual access to any navigation modules or records
sm_basic	Basic user role used when creating SM application. Reads and creates requests, and follows up on those requests. This role is a template only and it does not provide actual access to any navigation modules or records.

Role title [name]	Description
sm_dispatcher	Dispatcher user role used when creating SM application. Schedules and assigns tasks to agents. This role is a template only and it does not provide actual access to any navigation modules or record.
sm_read	Read-only user role used when creating SM application. This role is a template only and it does not provide actual access to any navigation modules or records.
template_admin	Grants the ability to create and administer Service Management templates.

Script includes installed with Service Management Core

Script includes are added with Service Management Core.

Script includes	Description
PartRequirementStateHandler	Marks a part requirement Sourced or Delivered based on the transfer orders.
SMTemplates	Builds a service order and related tasks from an SM Template.
SMAutoAssignment	Javascript wrapper around SNC.SMAutoassignment that automatically determines property prefix needed.
SMStockRooms	Retrieves and creates personal stockrooms.
BaseSMControls	Provides functions used to control access to service management records like the configuration and notification rules. Modify the SMControls Script Include to make changes rather than modifying this Script Include.
SMConfigProcessor	Handles changes that are made to the configuration page. Also handles sending notifications set up on the configuration page.
SMTemplateHelper	Backend-code for the SM Template page. Should not be customized.
AppCreatorCMSCreation	Creates CMS pages for apps created by Service Management template.
SMDateRollup	Rolls up the dates from service order tasks to service orders.
SMI18nUtils	Utilities for internationalizing the Service Management and Configuration Pages.
SMAJAX	Handles Service management AJAX calls.
AJAXMileageCalculator	Calculates mileage costs for incidentals.
SMCIControls	Service Management CI controls for adding and removing CI's from Orders and Tasks.
SharedServiceUtils	Shared Service Utilities
SMSourcingDispatch	Contains methods supporting the Agent Schedule section in the lower portion of the Source popup.
SMStateFlowCreator	Methods for creating state flows for ESM-based applications.

Script includes	Description
SMAgentStatusAJAX	AJAX wrapper around the updateStatus function available in SMScheduleStatus.
SMDateValidation	Verifies that dates in service order tasks are valid and consistent with one another in terms of scheduling.
SMTask	Service Management Task utility functions.
AppCreatorKnowledgeCreation	Methods for "app creator" engine to create knowledgebase pages.
SMAgentStatus	Code for updating the "on schedule" and status of an agent.
SMAppCreator	Methods for creating Service management applications.
SMScheduleGrapper	Schedule APIs. Gets schedule times from a work order task in milliseconds. Actual times are given priority, if those are not available, return scheduled times.
SMTableCreator	Methods for creating tables for Service management applications
SMControls	Extension of BaseSMControls. Modify this script for controlling access to service management records like the configuration and notification rules
AssetUsageFilters	Reference qualifier filters for AssetUsage.
SMTaskDependency	Collection of methods that control the data integrity of the Service Order Tasks Dependency [sm_m2m_task_dependency] table.
AppCreatorCatalogCreation	Creates an SM application catalog.
SMAssetUsage	Asset Usage APIs
SMConstants	List of constants used in the State field of the Service Management (SM) flows (sm_order and sm_task) and extended tables (for example, wm_order, wm_task).
SMNotifRuleTables	Restricts tables that are displayed on the SM Notification Rule form to the request and task table of the application.
SMTransferOrders	Collection of methods that create or update service management-related transfer order lines.
SMPortalCreator	Methods for creating a portal and reports for SM-based applications.
WMSourcingAjax	AJAX calls used in the "Source" popup available from Work Orders and Work Order Tasks. Contains methods for displaying work order tasks and part requirements in the tree-section (left-hand side), deleting and copying part requirements using the tree, and retrieving task information and agent information for the lower section.
SMFilters	Filters for service management.
SMUpgradeManager	Handles finding SM application items that need upgrades, storing information, upgrading.
SMTemplateMigration	Handles migrating SM templates from previous version of Geneva.

Client script includes installed with Service Management Core

Client scripts are added with Service Management Core.

Client script includes	Table	Description
Hide excluded fields	SM Config [sm_config]	Hide sm_config fields based on exclusion list.
Start work read-only (exp. travel chg)	Service order task [sm_task]	Start work read-only when travel is required and not started.
Start work read-only when travel is required and not started	Service order task [sm_task]	Displays an error after a location change when no dispatch group or assignment group covers the location of the work order task.
Show or hide/clear contract field	Service Management Incidentals [sm_incidentals]	If type is Vendor cost, then show the contract field. Otherwise, clear and hide the contract field.
check order of start date and end date	Service order task [sm_task]	Verify that the start date happens before the end date.
Update Assigned to (Assign Group change)	Service order [sm_order]	Update Assigned to when Assignment group changes: - clear the Assigned to field.
Ci update	Service order [sm_order]	Updates the associated asset and location based on changes to the affected CI.
Populate CI Location	Service order [sm_order]	Populates work order location based on CI location.
check_work_duration	Service order task [sm_task]	Verify that the work duration is not 0 or empty.
Calculate total amount - quantity	Service Management Incidentals [sm_incidentals]	Calculates the total mileage costs when the quantity changes.
Validate Estimated Travel Duration	Service order task [sm_task]	Ensure that the estimated travel duration does not carry into the expected start time.
Validate Scheduled Travel Start	Service order task [sm_task]	Ensure that the scheduled travel start (with its duration) is before scheduled work start.
Template selected	Service order [sm_order]	Populates form based on template values.

Client script includes	Table	Description
Populate Caller Location	Service order [sm_order]	Sets the location field when the caller is changed.
Check for group errors	Service order [sm_order]	Displays an error on load if no qualification group covers the location of the work order.
Hide unused related lists/fields	Service order [sm_order]	Hides related lists that are not relevant based on application configuration
Ci update	Service order task [sm_task]	Updates the associated asset and location based on changes to the affected CI.
New fields type control	SM Template Definition [sm_template_definition]	Displays the appropriate field type based on selection of field on template definition page.
Asset update	Service order [sm_order] [sm_order]	Updates the associated configuration item and location based on changes to the affected asset.
Field onload helper	SM Template Definition [sm_template_definition]	Displays the appropriate field type based on selection of field on template definition page (onload).
Read only task templates dependencies	Service Order Task Template Dependency [sm_m2m_task_template_dependency]	Makes the dependent field read only when creating task template dependencies in sm_m2m_task_template_dependencies table.
Make Location not mandatory	Stockroom [alm_stockroom]	Makes Location not mandatory for stockroom type field_agent
Calculate End Time (Duration change)	Service order task [sm_task]	Calculates Estimated End Time in a Work Order Task based on a change of estimated work duration.
Show error when no application installed	Service Order Model [cmdb_serviceorder_product_model]	Show error when no application installed.
Calculate total amount - cost per mile	Service Management Incidentals [sm_incidentals]	Calculates the total mileage costs when the quantity changes.
Priority assignment	SM Config [sm_config]	Set scheduling to true and hide consistent assignment of priority assignment is turned on.
Asset update	Service order task [sm_task]	Updates the associated configuration item and location based on changes to the affected asset.

Client script includes	Table	Description
Read only group dependencies	Service Order Group Dependency [sm_m2m_group_dependency]	Once set, fields are read-only.
Add sourcing UI Listeners	Service order task [sm_task]	Sets up event listeners for changes to travel duration, work duration, or expected work start so that they are automatically updated in the sourcing UI (if the task is opened via the sourcing UI).
check window_start	Service order task [sm_task]	Verify that window start is before window end.
Set required quantity read-only	Part Requirement [sm_part_requirement]	Sets the Required quantity field to read-only when the required number of assets are sourced for the part requirement
Show messages	Service order task [sm_task]	Shows messages if the expected due date for the task is after the requested due date of the request, or if auto-assignment does not work.
Calculate total amount - type	Service Management Incidentals [sm_incidentals]	Calculates the total mileage costs when the type changes.
Update Assigned to (Assign Group change)	Service order task [sm_task]	Update Assigned to when Assignment group changes: - clear the Assigned to field.
Hide group field	Service Task Model [cmdb_servicetask_product_model]	Hides the dispatch group field when dispatch queue is off
Hide state flow field	SM Config [sm_config]	When state flow is turned off, hide the field from the form.
Check TOs before reassigning	Service order task [sm_task]	When reassigning or unassigning a work order task, prompt user to cancel all transfer orders to personal stock rooms for a task if the task only has cancelable transfer orders.
Verify Group Post Dispatch Group Change	Service order task [sm_task]	Displays an error on load if no assignment group covers the location of the work order task.
Set Tables	SM Notification Rule [sm_notification_rule]	Limit the tables to the two possible tables, if none is chosen, set the first one as the default.
Calculate End Time (Start time change)	Service order task [sm_task]	Calculate the Estimated End Time based on Expected Start Time changing. Also checks for

Client script includes	Table	Description
		inconsistencies that may have been created with estimated travel start.
Update Model and Quantity based on Asset	Asset Usage [sm_asset_usage]	Synchronizes model and quantity information of an asset usage record based on the asset it references.
Read Only Order Affected CIs	Affected CI [sm_m2m_order_affected_ci]	Makes a field read only once a value is selected for that field.
Reset quantity	Service Management Incidentals [sm_incidentals]	When the type changes back to car rental, the Qty is set back to 1.
Read Only Task Affected CIs	Task Affected CI [sm_m2m_task_affected_ci]	Makes a field read only once a value is selected for that field.
Hide group field	Service Order Model [cmdb_serviceorder_product_model]	Hide the assignment group field if application is not request driven, hide the qualification group field if qualification is off.
Check TOs before reassigning	Service order task [sm_task]	When reassigning or unassigning a work order task, prompt user to cancel all transfer orders to personal stock rooms for a task if the task only has cancelable transfer orders.
Notify parent on submit	Part Requirement [sm_part_requirement]	Updates the Source tree whenever a new part requirement is created inside the Source popup window.
Show warning msg of templates upgrade	SM Config [sm_config]	Show warning message when the templates must be migrated.
Verify Group Fields	Service order task [sm_task]	Displays an error on load if no dispatch group or assignment group covers the location of the work order task.
Ensure no negative and decimal quantity	Part Requirement [sm_part_requirement]	Ensures the quantity required for a part is valid.
Read only task dependencies	Service Order Task Dependency [sm_m2m_task_dependency]	Making the dependent field read only on creating task dependencies in sm_m2m_task_order table.
Start work read-only (actual travel chg)	Service order task [sm_task]	Start work read-only when travel is required and not started. 'Schedule travel start' and 'Schedule start' are mandatory when 'Agent Track Time' is on.
Show warning message of disable SF	SM Config [sm_config]	Shows a warning message when state flows are disabled.

Client script includes	Table	Description
Populate from stockroom for drop off	Transfer Order [alm_transfer_order]	Sets the from stock room to the logged in user's personal stockroom when creating a drop off transfer order.
Set value before submit	SM Template Definition [sm_template_definition]	Sets the value from the various widgets to the appropriate value before submitting the template definition form.
Template selected	Service order task [sm_task]	Populates form based on template values.
Personal Stockroom Name by Type	Stockroom [alm_stockroom]	Sets the name of a stockroom based on its manager when it becomes a personal stockroom.
Update agent status	Service order task [sm_task]	Update the status of assigned agent.
Update UI on load and model change	Asset Usage [sm_asset_usage]	Update UI on load and model change
Personal Stockroom Name by Manager	Stockroom [alm_stockroom]	Updates the name of a personal stockroom when its manager changes.
Hide unused related lists/fields	Service order task [sm_task]	Hides related lists that are not relevant based on application configuration.
use schedule	SM Config [sm_config]	Turn off priority assignment and show consistent assignment if scheduling is turned off.
Verify Group Post Location Change	Service order [sm_order] [alm_stockroom]	Displays an error after a location change when no qualification group covers the location of the work order.

Business rules installed with Service Management Core

Business rules are added with Service Management Core.

Business rule	Table	Description
Build scratchpad & display info messages	Service order task [sm_task]	Build scratchpad variables that are used to display initial info messages on page.
Affected CI changed or removed	Service Order [sm_order]	Synchronizes the primary CI field and the Affected CIs related list on the Service Order form.

Business rule	Table	Description
Verify Work Notes	Service Order [sm_order]	Ensures that the Work notes field is populated in work orders that transition to the Cancel state.
Set default values	SM Template Definition [sm_template_definition]	Sets the table field by default.
Set Personal Stockroom	Transfer Order [alm_transfer_order]	Automatically sets the stockroom to the personal stockroom of the logged in user for drop-off transfer orders.
Export to update set	Part Requirement [cmdb_model_part_requirement]	Exports part requirement templates to the current update set and creates a sys_metadata_link record to associate template with current application.
Export to update set	Service Order Task Models [sm_m2m_somodel_stmodell]	Exports link between service order template and service task template to the current update set and creates a sys_metadata_link record to associate template with current application.
Export to update set	Service Order Task Template [cmdb_servicetask_product_model]	Exports service task templates to the current update set and creates a sys_metadata_link record to associate template with current application.
Export to update set	Service Order Template [cmdb_serviceorder_product_model]	Exports service order templates to the current update set and creates a sys_metadata_link record to associate template with current application.
Sync update of associated variables	SM Template Definition [sm_template_definition]	Synchronizes template definition with associated catalog variable.

Business rule	Table	Description
Date Checks	Service Order Task [sm_task]	Validates the window, estimated, and actual start and end dates.
Populate Location - New SOT	Service Order Task [sm_task]	Populates the location, if possible, based on parent work order location.
add_model_filter	Global [global]	Filter for SM Model Application slush bucket, limits available models to hardware and consumable models.
Reset qty to 1	Service Management Incidentals [sm_incidentals]	Sets the quantity field to 1 when the type is Car Rental.
Validate notification	SM Notification Rule [sm_notification_rule]	Validates that a user or group is selected when inserting or updating a notification rule.
Validate Field Agent Type	Stockroom [alm_stockroom]	Prevents duplicate personal stockrooms.
Calculate cost	Service Management Incidentals [sm_incidentals]	Helps to calculate the Cost when the Type is Mileage (starting with the Eureka release).
Check asset and CI	Service order task [sm_task]	Synchronizes affected CIs and affected assets.
Assign the previous agent on task	Service order task [sm_task]	Sets the previous agent whenever the task assigned to changes.
Populate Service Order from Template	Service Order [sm_order]	Populates a new work order from the work order model selected as a template.
Validate quantity requested	Transfer Order Line [alm_transfer_order_line]	Checks that the quantity requested on a transfer order line with a part requirement does not exceed the quantity that is required to fulfill the part requirement (starting with the Eureka release).
Close service order on workflow complete	Workflow contexts	Prevents rollup of task closures when there

Business rule	Table	Description
	[wf_context]	are active workflows on service orders.
Create Sub Tasks	Service Order [sm_order]	When service order leaves draft state, creates tasks from template if service order built from template, or creates default task if task-driven.
Validate Field Agent Name	Stockroom [alm_stockroom]	Validates that a personal stockroom has a valid, associated agent.
Create expense line	Service Management Incidentals [sm_incidentals]	Creates or updates an expense line based on the incidental's cost when the incidental is saved and all of the following are true: <ul style="list-style-type: none"> • The state is Incurred • The type is not None • The cost is not zero
Validation	Service Order Groups Dependency [sm_m2m_group_dependency]	Validates that the dependency is valid.
Verify CI on SM Task	Cis Affected [task_ci]	Verifies that the affected CI for a task is also an affected CI for the order.
Vendor type requires manager	User Group [sys_user_group]	Vendor is required for vendor groups.
Part Requirements	Service Order Task [sm_task]	Creates part requirements for a service order task from the part requirements configured for a service order task model used as a template. Free up assets when unassigned or reassigned. Update asset usages when tasks are closed.

Business rule	Table	Description
Apply dispatch method	Service Order Task [sm_task]	Automatically assigns a task once it is marked as ready for assignment when assignment method of the application is workflow or auto.
Group change validation	Service Order Task [sm_task]	Validates changes to assignment and dispatch groups in work order tasks.
Assign the previous agent on order	Service Order [sm_order]	Sets the previous agent whenever the order assigned to changes.
ValidateChanges	Service Order Task [sm_task]	Validates dispatch group and assignment group types match and that worknotes are provided if required.
Transitions	Service Order Task [sm_task]	Sets a task into work in progress when the task is accepted and work start is populated.
Sync catalog	SM Config [sm_config]	Synchronizes the application catalog when the service management configuration changes.
Set required by date on display	Part Requirement [sm_part_requirement]	Sets part requirement required by to the expected travel start of the associate service order task.
Request driven dispatch	Service Order [sm_order]	Responsible for dispatching service orders based on application configuration.
Build scratchpad & display info messages	Service Order [sm_order]	Build scratchpad variables that are used to display initial info messages on page.
Prevent Loop In TaskTemplateDependencies	Service Order Task Template Dependency [sm_m2m_task_template_dependency]	Prevents loops in task template dependencies
getMainSMMModels	Global [global]	Slush bucket filter when linking service

Business rule	Table	Description
		order task templates to service order templates.
Task contract m2m	Service Management Incidentals [sm_incidentals]	Synchronizes contracts, expense lines, and incidentals
Notification for task	Service Order Task [sm_task]	Sends notifications when task changes if values change for fields specified in the configuration page.
Build scratchpad tables	SM Notification Rule [sm_notification_rule]	Sets the tables that should be displayed on notification rule page.
Update PR based on TOL	Transfer Order Line [alm_transfer_order_line]	Updates the part requirement when the associated transfer order line changes stage.
Add removed asset	Asset Usage [sm_asset_usage]	Determines validity of asset removal and updates the removed asset accordingly.
Add/remove manager to/from vendor group	Group [sys_user_group]	When group manager changes for a vendor group, add the new manager as a group member and remove the previous manager as a group member.
Service Management Group Types	Group [sys_user_group]	Ensures data integrity for dispatch group coverage information.
Deletion of Affected CI	Cis Affected [task_ci]	Part of the synchronization mechanism between the primary CI field and the Affected CIs related list on the Service Order form.
Prevent Loop In Tasks Dependencies	Service Order Task Dependency [sm_m2m_task_dependency]	Prevents circular work order task dependencies.
Cascade SO deletion	Service Order [sm_order]	Delete service order tasks and checklists when service order is deleted.
Create Personal Stockroom	User Role	Creates a personal stockroom for users (if

Business rule	Table	Description
	[sys_user_has_role]	they do not have one already) when they are assigned an agent role.
Delete Personal Stockroom	User Role [sys_user_has_role]	Deletes a user's personal stockroom when all agent roles are removed from the user.
Validate Part Requirement	Part Requirement [sm_part_requirement]	Validates the part requirement and checks for availability of the part. Validates sourcing information.
Invoke template workflow & move task	Service Order [sm_order]	Start workflow for service order and move subtasks to pending dispatch.
Populate Group - Qualification	Service Order [sm_order]	Populates the qualification group, if possible, based on location.
Create catalog	Service Order Template [cmdb_serviceorder_product_model]	Create a corresponding record producer if automatic publishing is on.
Populate schedule	Service Order Task [sm_task]	Populates scheduling fields if they are not already set. They are set, only if the state changes to Pending Dispatch.
Notification for request	Service Order [sm_order]	Sends notifications when task changes if values change for fields specified in the configuration page.
Cascade delete checklist	Service Order Task [sm_task]	Delete checklists when service order task is deleted.
Scratchpad	SM Config [sm_config]	Builds scratchpad for SM config form.
Validate TOL and check availability	Transfer Order Line [alm_transfer_order_line]	Validates transfer order line state changes and ensures that the asset is available in the stockroom.
Delete all expense lines	SM Incidentals	Delete expense lines when incidentals are deleted.

Business rule	Table	Description
	[sm_incidentals]	
Populate Schedule - New SOT	Service Order Task [sm_task]	Populates scheduling fields if they are not already set. They are set only if the state changes to Pending Dispatch.
Populate Location	Service Order [sm_order]	Populates the location, if possible, based on the affected CI identified by the caller.
Add as Primary if none set	Cis Affected [task_ci]	Add configuration item as primary affected CI if no primary CI exists.
Roll Up Changes	Service Order Task [sm_task]	Rollup state changes and estimated work times to service order.
Build scratchpad	Service Order Template [cmdb_serviceorder_product_model]	Sets scratchpad for service order template form.
Check asset and CI	Service order [sm_order]	Synchronizes affected Cis and affected assets.
Unassigned	Service order [sm_order]	Sets state of service order back to ready when it becomes unassigned.
Propagate priority	Service order [sm_order]	Propagates priority from service order to service order tasks.
Apply configuration settings	SM Config [sm_config]	Handles changes to SM Config record.
Update agent status	Service Order Task [sm_task]	Updates the status of an agent assigned to a task.
Build scratchpad	Service Order Task Template [cmdb_servicetask_product_model]	Sets scratchpad for service order task template form.
Check TOs before reassigning	Service Order Task [sm_task]	Sets scratchpad to prevent reassigning a task when there are transfer orders in transit.

Business rule	Table	Description
Prevent Duplicate Order Affected CIs	Cis Affected [task_ci]	Prevent duplicated affected CIs
Unassigned	Service Order Task [sm_task]	Prevent reassigning a task if there are transfer orders in transit.
SNC - Run parent workflows (Approval)	Approval [sysapproval_approver]	Handles order workflows when approval set to "More info required" or "Duplicate".
getTaskSMMModels	Global [global]	Slush bucket filter when linking service order templates to service task templates.
Prevent model change after sourced	Part Requirement [sm_part_requirement]	Prevent changing the model after the part requirement is sourced.
Create AssetUsage when TOL delivered	Transfer Order Line [alm_transfer_order_line]	Create asset usage once a transfer order line is delivered.
Release Asset on AssetUsage delete	Asset Usage [sm_asset_usage]	Make asset available when asset usage is deleted.
Redirect TOL to existing TO under WOT	Transfer Order Line [alm_transfer_order_line]	Attempts to group transfer order lines under the same transfer order for a service order if the transfer order lines have the same "from" and "to" locations.
Populate Group - Dispatch/ Work	Service Order Task [sm_task]	Populates the dispatch group and assignment groups when only one dispatch group covers the location of a task, and only one assignment group is covered by the dispatch group.

Email notifications installed with Service Management Core

Email notifications are added with Service Management Core.

Notification	Table	Description
\${Request_Label} created from email	Service Order [sm_order]	Template that is used to build notifications for new applications created from a Service Management template. This notification should remain inactive and not be used.
\${Request_Label} changed	Service Order [sm_order]	Template that is used to build notifications for new applications created from a Service Management template. This notification should remain inactive and not be used.
\${Task_Label} changed	Service Order [sm_order]	Template that is used to build notifications for new applications created from a Service Management template. This notification should remain inactive and not be used.

Planned Maintenance

The Planned Maintenance application is not a Service Management application, but it works with Service Management applications to help organizations manage regular preventive maintenance of assets.

Planned Maintenance uses maintenance plans to trigger the creation of work orders or facilities requests. These work orders and facilities requests specify how to perform maintenance on devices and vehicles, or just about any type of asset that requires maintenance. Work orders and requests can be based on:

- A specified time interval. For example, after a number of months since the previous maintenance was performed
- Meters or usage. For example, after a specified number of pages are printed or a specified number of miles are driven.

Activate Planned Maintenance

The SM **Planned Maintenance** plugin is available as a separate subscription.

Before you begin

Role required: admin

About this task

Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.
2. Find the plugin using the filter criteria and search bar.

You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.

You will see a message after installation is completed. For information about the components installed with a plugin, see [Find components installed with an application](#).

Installed with SM Planned Maintenance

The SM Planned Maintenance core plugin also includes demo data.

Tables installed with SM Planned Maintenance

Table	Description
Maintenance Plan Record [sm_m2m_maint_plan_to_record]	Relates a maintenance schedule to a record in the system (from a document ID). Also contains information about the last time or value the schedule was run for the record and the next time or value when the schedule will run.
Schedule Template [sm_m2m_schedule_template]	Relates a maintenance schedule to service management templates.
Maintenance Plan [sm_maint_plan]	Defines a maintenance plan, including which table and records the plan applies to.
Maintenance Schedule [sm_schedule]	Defines a schedule that is part of a maintenance plan. A schedule can be duration, meter, condition, or script based.

Roles installed with SM Planned Maintenance

Role title [name]	Description
plan_maint_admin	Administrator for planned maintenance.

Script includes installed with SM Planned Maintenance

Script include	Description
PlannedMaintenanceUtils	Utilities for planned maintenance.
PlannedMaintenanceAjax	AJAX entry points into PlannedMaintenanceUtils.

Client scripts installed with SM Planned Maintenance

Client script	Table	Description
Update field display - trigger type chg	Maintenance schedule	Updates the fields displayed on the maintenance schedule form based on the trigger type selected.

Client script	Table	Description
	[sm_schedule]	
Update field display - repetition chg	Maintenance schedule [sm_schedule]	Updates the fields displayed on the maintenance schedule form based on the repetition selected.
Update table when type changes	Maintenance plan [sm_maint_plan]	Updates the table field based on the selected models (for model-based plans).
Validate the every field	Maintenance schedule [sm_schedule]	Verifies that the every field is a positive number; else it defaults to 1.
Update table when models change	Maintenance plan [sm_maint_plan]	Updates the table field based on the selected models (for model-based plans).

Business rules installed with SM Planned Maintenance

Business rule	Table	Description
Update maintenance plan record	Service Order [sm_order]	Updates the maintenance records [sm_m2m_maint_plan_to_record] once a service order is closed.
Update m2m schedule records	Maintenance schedule [sm_schedule]	Recalculates the next value or next run time when meter or duration fields change.
Active changes	Maintenance Plan Record [sm_m2m_maint_plan_to_record]	Handles changes to the active flag for a maintenance plan record.
Active insert	Maintenance Plan Record [sm_m2m_maint_plan_to_record]	Handles changes to the active flag for a maintenance plan record.
Active changes	Maintenance schedule [sm_schedule]	Handles changes to the active flag for a maintenance schedule.
Active changes	Maintenance plan [sm_maint_plan]	Handles changes to the active flag for a maintenance plan.
Active Insert	Maintenance schedule [sm_schedule]	Handles changes to the active flag for a maintenance schedule.

Business rule	Table	Description
Apply plan to new records	Maintenance plan [sm_maint_plan]	Updates the business rule for applying a plan to new records whenever the Apply to new records field changes.

Scheduled jobs installed with SM Planned Maintenance

Scheduled jobs	Description
Planned Maintenance Nightly Run	Builds maintenance requests based on active maintenance plans.

Managing maintenance plans

Planned Maintenance allows you to create, maintain, and schedule maintenance for equipment that requires regular maintenance.

The maintenance plan specifies the CI class, product model, or other criteria, such as location, and specifies the maintenance to be performed. The maintenance schedule specifies the timing, by specifying how often and when to perform the maintenance.

For example, you can configure a maintenance plan to inspect and clean all air conditioners for a particular product model. The maintenance schedule specifies that the inspection is performed every six months.

Maintenance plans and schedules also take into consideration service management work orders and facilities requests opened against that equipment.

Timing the first maintenance

By default, the first planned maintenance is scheduled based on the timing entered in the schedule. For example, if you create a schedule to inspect the air conditioners every six months, the first maintenance occurs six months from the time that you created the schedule.

To schedule the date of the first maintenance:

1. Navigate to the Maintenance Schedule form.
2. Click the **Run on demand** related link.
3. De-select the **Run now** field.
4. In the **Select next run date** field, use the calendar to select the desired date.
5. Save the date.
6. Click **Schedule**. This updates the next run time for the maintenance plan records.

You can update any maintenance schedule as needed. For example, if the regular interval is due next month, you can select an earlier or later date to change when the maintenance occurs.

Create a maintenance plan

When creating a maintenance plan, options on the form help to determine how and when maintenance should be performed.

Before you begin

Role required: SM admin

Procedure

1. Navigate to **All > Planned Maintenance > Maintenance Plans**.
2. Click **New**, specify a meaningful **Name** and **Short description**, fill in the form, and then click **Submit**.

Maintenance plan

Field	Description
Number	Auto-generated identification number for the maintenance plan.
Conditions	
Type	<p>Type of trigger that determines when maintenance should be performed.</p> <ul style="list-style-type: none"> ○ Model based: Base the maintenance plan on a specified model of a CI, such as a product model. ○ General: Base the maintenance plan on a table and filter. <p>Note: Model-based plans apply only to hardware models, specifically ones that have at least one model category defined.</p>
Model	<p>Select one or more Product catalog items to identify the CIs that require preventive maintenance. When you select a model, the associated table appears in the Table field. For example, if you select a specific model of PC, the Table field displays <i>Computer [cmdb_ci_computer]</i>. This field appears if you selected the Model based type.</p> <p>If you select more than one model in the same category, the table does not change. But if you select a CI from a different category, the Table field displays the lowest level table that contains all the selected CIs. For example, if you select two PCs and one laser printer, the Table field changes to <i>Hardware [cmdb_ci_hardware]</i>, because that table includes computers and printers. If you then add a computer rack, the Table field changes to <i>Configuration Item [cmdb_ci]</i>, which contains all CIs.</p>
Table	If you selected the General type, select the table you want to associate with the maintenance plan. If you selected the Model based type, this field displays the lowest level table that contains all the selected CIs.
Filter condition	Filter conditions to locate the specific assets you want to maintain. Only records in the selected table that match the filtering criteria require maintenance.
Apply to new matching records	Select the check box to ensure that the schedules defined for this maintenance plan are applied to all records that have been added to the specified table since the last time the plan was executed, and that meet the conditions entered in the Filter condition . For more information, see Associate a maintenance plan to filtered records .
Task creation policy	Specify what to do when a maintenance plan runs on a record that is already under maintenance.

Field	Description
	<ul style="list-style-type: none"> ○ Leave alone: Do not allow the creation of new tasks or the deletion of existing ones. ○ Cancel existing: Allow tasks currently associated with the plan to be deleted. ○ Add to existing: Allow new tasks, along with existing active tasks, to be added to maintenance plans.

The maintenance plan is now ready for you to [Configure a maintenance schedule](#).

Note: You can [configure the form](#)  to add **Asset**, **CI**, and **User** reference fields. These fields are appropriately pre-filled in the associated table and can be useful for generating reports. When a configuration item is selected for the maintenance plan and it is associated with an asset, the **Asset** field is pre-populated with that CI.

Note: After you define a maintenance plan and create maintenance schedules for the plan, you cannot change the **Type**, **Model**, and **Table** fields, or the **Filter conditions**. Changes could potentially cause conflicts. If you need to make changes to those fields, first delete the maintenance schedules, then recreate the schedules with the desired settings.

Property settings for Planned Maintenance

You configure Planned Maintenance properties at **Planned Maintenance > Properties**.

Trigger properties

Use this property to maintain the planned maintenance intervals in fixed meter

[planned_maintenance.fixed_meter]

Preserve the calculated meter trigger. See the illustration.

- Select the check box to perform the next planned maintenance at the meter value that was originally calculated even if the most recent work order was completed at a later meter value.
- Clear the check box to restart the meter calculation using the reading when the work order was completed.

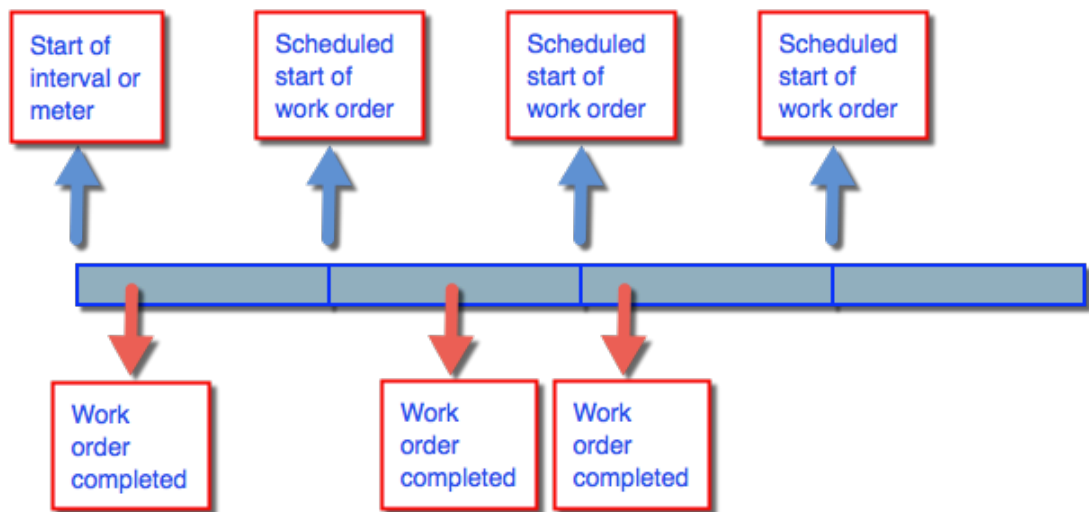
Use this property to maintain the planned maintenance intervals in fixed intervals

[planned_maintenance.fixed_interval]

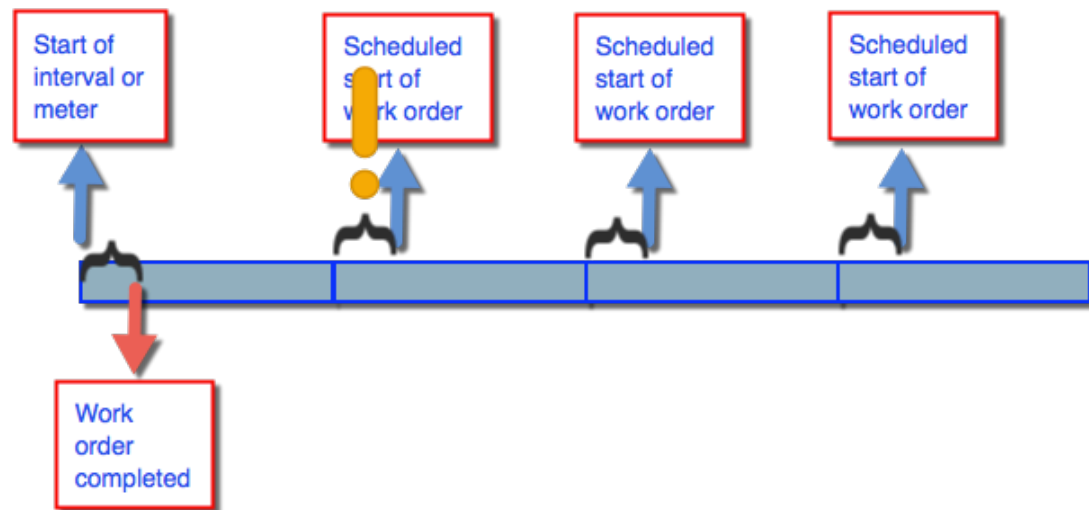
Preserve the calculated interval trigger. See the illustration.

- Select the check box to perform the next planned maintenance at the time/date that was originally calculated based on the configured interval even if the most recent work order was completed late.
- Clear the check box to restart the interval calculation when the work order is completed.

'Preserve the calculated trigger': Selected



'Preserve the calculated trigger': Not selected



Configure a maintenance schedule

After creating a maintenance plan, define specific criteria for determining when the plan should be executed.

Before you begin

Role required: sm_admin

About this task

Depending on the asset or CI for which you are setting up maintenance plans, you can create a single plan or multiple plans. For example, you can set up plans for a class of computer to be rebooted on the first and fifteenth of every month.

Note: Plan carefully when defining multiple maintenance schedules for the same plan. For example, you set up one schedule to replace a printer cartridge every three months. You set up another schedule to replace the cartridge after every 10,000 pages is printed. This conflict could cause the cartridge to be replaced twice in the same week. Ensure that your schedules do not conflict with one another.

Based on the templates associated with the plan, one or more service management work orders and facilities requests are auto-generated.

Maintenance schedules can be based on either duration or meter and can be triggered by the first occurring related condition. For example, on the Maintenance Schedule form, select **Duration or Meter** as the trigger for an automobile maintenance schedule and then define the duration as three months and the meter as 5,000 miles. The schedule is triggered by whichever comes first. With the **Duration or Meter** trigger selected, the **Next run time** and **Next run value** fields are populated in the **Maintenance Plan Records** related list on the Maintenance Plan form.

Note: In a maintenance plan record, the time stamp displayed in the **Next run time** field is not the same as the time set for executing the planned maintenance. The **Next action** field in the **Planned Maintenance Nightly Run** record displays the actual scheduled job execution time for the planned maintenance.

When the scheduled job runs, it will check whether the value in the **Next run time** field is less than the time set of the next planned maintenance nightly run job and if it is, the system will generate a request. A planned nightly maintenance is not executed and a request is not generated based on the next run time.

Procedure

1. Navigate to **All > Planned Maintenance > Maintenance Plans**.
2. Click the number of the maintenance plans you want to associate to a maintenance schedule.
3. In the **Maintenance Schedules** related list, click **New**, specify a meaningful **Name** and **Short description**, fill in the form, and then click **Submit**.

Note: If the form is configured to show the **Next action** field, you can select the date and time for the first maintenance to be performed.

Maintenance schedule

Field	Description
Plan	Name of the maintenance plan that this schedule is a part of.
Active	Select the check box to activate the schedule for the maintenance plan.
Trigger	<p>Timing condition that triggers the execution of the plan.</p> <ul style="list-style-type: none"> ○ Duration: Maintenance to be performed based on time. Depending on your selection, additional fields appear to define the duration. ○ Meter: Maintenance to be performed based on count. The Every and Field fields appear. ○ Condition: Maintenance to be performed when a certain condition is met. The Filter condition field appears

Field	Description
	<ul style="list-style-type: none"> ○ Script: Apply advanced criteria for running a maintenance plan. The Script field appears. ○ Duration or Meter: Maintenance to be performed based on both time and count, whichever comes first. You must specify the duration and meter details.
Trigger type	Duration category for the maintenance schedule. For example, if you select Monthly , the Due day of month field appears so you can specify which day of each month to run maintenance. Different fields appear depending on the trigger type selected. This field appears when Duration is selected for Trigger .
Repeat	Frequency of the repetition. This field appears when Interval is selected for Trigger type .
Due day of week	Day of week to repeat on. This field appears when Weekly is selected for Trigger type .
Due day of month	Day of the month to repeat on. This field appears when Monthly or Annually is selected for Trigger type .
Due month	Month to repeat on. This field appears when Annually is selected for Trigger type .
Due time	Time of day in hours, minutes, and seconds. This field appears for all trigger types except Interval .
Every	Number of occurrences, such as miles or pages, that must be recorded before the maintenance plan is executed. Must be greater than zero (0). This field appears when Meter is selected for Trigger .
Field	Field used to define what the occurrences in the Every field apply to. For example, if the pages field is entered, the Every field can contain the number of pages that are printed before the action defined in the plan is performed. This field appears when Meter is selected for Trigger .
Table	Lists the table associated with the assets or CIs selected for maintenance. This field appears when Meter or Condition is selected for Trigger .
Lead time	Number of days prior to the Requested Due by date to determine the date on which work should begin. That date is pre-filled in the Scheduled start field for the task. This field appears when Duration is selected for Trigger .
Condition	Condition that determines if the maintenance schedule should run. This field appears when Condition is selected for Trigger .
Script	Script that determines if the maintenance schedule should run. This field appears when Script is selected for Trigger . Maintenance runs if the script returns true. The "current" variable is available and represents the record that is undergoing maintenance, for example, a CI.

- Specify whether the next planned maintenance should occur at the originally calculated time/ meter value or whether to restart the meter/interval calculation from the time that the work order was completed.
See [Property settings for Planned Maintenance](#).

Changes to maintenance schedules

If you make and save changes to an existing maintenance schedule, any previously associated records are updated accordingly.

The following examples explain the types of behavior you can expect after making changes:

- If you change a schedule from a duration-based to a meter-based schedule, the next run time is cleared and the associated records are populated with a next run value instead.
- If the **Every** field is changed on a meter-based schedule, the next run value is updated based on the existing *Last Run Value*, or from the current value of the asset if no last run value exists.
- If you change the **Field** value for a meter-based schedule, the records associated with the schedule have their next run values recalculated based on the new **Field** value.
- For Interval-based schedules, changing from one **Trigger type** to another updates the next run time based on the existing **Last Run Time** value, or from **Now** if no last run time exists.

Associate a maintenance plan to filtered records

You can configure a maintenance plan with filtering criteria. For example, you can apply a maintenance plan to all records containing computers that start with "apple".

Before you begin

Role required: SM admin

Procedure

1. [Create a maintenance plan](#).
2. Set up a **Filter condition** to capture the records that should use the maintenance plan.

Note: You can click **Refresh** (🔄) to view the number of matching records.

3. Click **Submit**.
4. [Configure a maintenance schedule](#).
5. In the **Related Links** for the maintenance plan, click **Apply schedules to filtered records**.

Result

The schedule is applied to the records that meet the specified filter conditions.

Note: If multiple schedules are defined, they all take effect on the matching records when you click **Apply schedules to filtered records**. See [Configure a maintenance schedule](#) for details. This same functionality exists for maintenance schedules. The **Related Links** for the schedule also contains an **Apply schedule to filtered records** link. If you click this link in the maintenance schedule, only this specific schedule is applied to the records that meet the filter conditions in the associated maintenance plan.

Associate a schedule template to matching records

The instance adds templates to a maintenance schedule so the appropriate requests and tasks, such as work orders and facilities requests, can be auto-generated when a maintenance schedule runs.

Before you begin

Role required: SM admin

About this task

A maintenance schedule runs and the requests or orders are generated, when a scheduled job called *Planned Maintenance Nightly Run* evaluates the schedule and determines that the meter or interval criteria in the schedule is met or exceeded. You can [run a scheduled job to execute a maintenance schedule](#) that runs at a day or time convenient for your business.

Each auto-generated service order is linked to the record under maintenance in the following ways:

- Each service order **Record table** and **Record ID** field is always populated with the table name and ID of the record under maintenance.
- If the record under maintenance is a configuration item, the service orders **Affected CI** field is populated.

Procedure

1. [Create a maintenance plan.](#)
2. Add a **Filter condition** to identify those records for which you want to apply the maintenance plan.

Note: You can click **Refresh** () to display the number of matching records.

3. Click **Submit**.
4. [Define or select a maintenance schedule.](#)
5. In the **Maintenance Schedules** related list, click the name of the schedule.
In the **Maintenance Schedule** form, a **Schedule Templates** related list appears.
6. In the **Schedule Templates** related list, click **Edit**.
The **Edit Members** slushbucket displays all the service order, work management, and facilities request templates defined using any of the following applications:
 - **Product Catalog > Templates > Work Order Templates**
 - **Facilities > Catalog&Knowledge > Facilities Request Templates**
7. Move the templates you want to apply to the matching record from the **Collection** bucket to the **Model List** bucket and then click **Save**.
8. In the Maintenance Schedule header, click **Back**.

Result

Work orders or facilities requests created by the scheduled jobs running on the associated records contain the selected template.

Run a scheduled job to execute a maintenance schedule

Maintenance schedules are executed whenever the meter, duration, script, or condition criteria is met. You can also use the Schedule ad-hoc feature to run a maintenance schedule manually.

Before you begin

Role required: SM admin

About this task

Maintenance schedules are run regularly using the *Planned Maintenance Nightly Run* scheduled job. When the scheduled job is run, the appropriate Service Orders are created for all records that meet the schedule criteria (including all records for the current day).

To configure the nightly planned maintenance scheduled job:

Procedure

1. Navigate to **All > System Definition > Scheduled Jobs**.
2. Open **Planned Maintenance Nightly Run**.
3. In Related Links, click **Configure Job Definition**.
4. To specify a different schedule for running the job, change the **Run** and **Time** fields.

A scheduled job does not run based on the value set in the **Next run time** field in the maintenance plan record for this job. For more information, see [Configure a maintenance schedule](#).

5. Click **Update.**

6. At any time, to run the scheduled job, click **Execute Now.**

The scheduled job evaluates all previously defined schedules and executes the ones that are scheduled to run.

Note: If one or more records in the table associated with the maintenance plan are deleted after the matching records were associated with the maintenance plan, the next nightly run removes all the records associated with those removed assets.

Run a maintenance schedule on demand

Maintenance schedules are typically run using the scheduled job named *Planned Maintenance Nightly Run*. However, you may want to run the schedule immediately or change the date when a schedule runs.

Before you begin

Role required: admin

About this task

When you run a maintenance schedule on demand, all of the next run dates for the relevant maintenance plan records are updated to the user-defined time, now or in the future. All the appropriate service orders are created. If the schedule is meter, condition, or script-based, service orders are created for maintenance plan records that meet the schedule criteria.

Procedure

1. Navigate to **All > Planned Maintenance > Maintenance Plans**.
2. Open the Maintenance Plan that contains the schedule to run.
3. In the **Maintenance Schedules** related list, select the maintenance schedule you want to run.
4. Click the **Run on demand** related link and then fill in the form.

On demand schedule

Field	Description
Run now	Select the check box to run the maintenance for the schedule immediately. Clear the check box to schedule a date for the schedule to run.
Select date	Date in the future for maintenance to run. Note: This field appears only when the Run Now check box is not selected.

View a maintenance log

You can view all maintenance performed on a particular CI, the next scheduled maintenance, and the last time maintenance was performed.

Before you begin

Role required: SM admin

Procedure

1. After the *Planned Maintenance Nightly Runs* scheduled job has executed for a maintenance plan, navigate to the location of the CI for which you ran the plan.
For example, **Configuration > Servers > Linux**.
2. Right-click in the record header and select **View > Maintenance**.
3. Select the CI to view the log.

Related lists display maintenance plans, maintenance plan records for the CI, and service orders.

Maintenance plan examples

You can define maintenance plans using model-based, meter-based, or duration-based selection criteria.

- To schedule a reboot for certain computer models after a specified number of keystrokes, define a model-based plan with a meter-based maintenance schedule.
- To schedule a printer ink cartridge replacement after printing a specified number of pages, define a general plan with a meter-based maintenance schedule.
- To schedule an antivirus scan on particular computers after a specified number of days, define a model-based plan with a duration-based maintenance schedule.

Define a maintenance schedule for a computer reboot

To schedule a reboot for certain computer models after a specified number of keystrokes, define a model-based plan with a meter-based maintenance schedule. In the example, a field called **keystrokes** is added to the Computer [cmdb_ci_computer] table.

Procedure

1. Navigate to **All > Planned Maintenance > Maintenance Plans**.
2. Click **New** and create a maintenance plan called *Reboot Apple Computers* with the following definitions and then click **Submit**.
 - **Type:** Model-based
 - **Model:** Click the lock icon and select **Apple iMac 27** and **Apple MacBook Pro 17**.
3. Navigate to **Planned Maintenance > Maintenance Plans** and then click the number of the maintenance plan you just created.
4. In the **Maintenance Schedules** related list, click **New**, enter the following settings, and then click **Submit**.
 - **Name:** Reboot Apple Computers
 - **Short description:** Scheduled reboot for Apple computers
 - **Repetition:** Meter
 - **Every:** 500000
 - **Field:** keystrokes

Result

The Reboot Apple Computer maintenance plan schedules all Apple iMac 27 and Apple MacBook Pro 17 computers to reboot after 500,000 keystrokes.

Define a maintenance schedule for an ink cartridge replacement

To schedule a printer ink cartridge replacement after printing a specified number of pages, define a general plan with a meter-based maintenance schedule. In the example, a table called **Printer** is added with string fields for printer, model, pages, and the like.

Procedure

1. Navigate to **All > Planned Maintenance > Maintenance Plans**.
2. Click **New** and create a maintenance plan called **Epson Laser Cartridge Replacement** with the following definitions and then click **Submit**.
 - **Type:** General
 - **Table:** Printer
 - **Filter condition:** Model is Epson
3. Navigate to **Planned Maintenance > Maintenance Plans** and then click the number of the maintenance plan you just created..
4. In the **Maintenance Schedules** related list, click **New**, enter the following settings, and then click **Submit**.
 - **Name:** Epson Laser Cartridge Replacement
 - **Short description:** Scheduled cartridge replacement for Epson laser printers
 - **Repetition:** Meter
 - **Every:** 7500
 - **Field:** Pages

Result

The Epson Laser Cartridge Replacement maintenance plan schedules all Epson laser printers to replace ink cartridges after printing 7,500 pages.

Define a maintenance schedule to run antivirus software

To schedule an antivirus scan on certain computers after a specified number of days, define a model-based plan with a duration-based maintenance schedule. In the example, a field called **trigger type** is added to the Computer [cmdb_ci_computer] table.

Procedure

1. Navigate to **All > Planned Maintenance > Maintenance Plans**.
2. Click **New** and create a maintenance plan called **Update Antivirus** with the following definitions:
 - **Type:** Model-based
 - **Model:** Click the lock icon and select **Apple iMac 27** and **Apple MacBook Pro 17**.
3. Click **Submit**.
4. Navigate to **Planned Maintenance > Maintenance Plans** and then click the number of the maintenance plan you just created.
5. In the **Maintenance Schedules** related list, click **New**, enter the following settings, and then click **Submit**.

- **Name:** Antivirus Update
- **Short description:** Scheduled antivirus update for Apple computers
- **Repetition:** Duration
- **Trigger Type:** Interval
- **Days:** 30

Result

The Update Antivirus maintenance plan schedules all Apple iMac 27 and Apple MacBook Pro 17 computers to run the antivirus software every 30 days.

Domain separation and Planned Maintenance

Domain separation is supported in Planned Maintenance. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Standard*

The support level is Standard but has some exceptions or special conditions.

- Includes all aspects of **Basic** level support.
- Business logic: The service provider (SP) creates or modifies processes per customer. The use cases reflect proper use of the application by multiple SP customers in a single instance.
- The instance owner must be able to configure minimum viable product (MVP) business logic and data parameters. This configuration is done per tenant, as expected for the specific application.

Sample use case: An admin must be able to make comments required when a record closes for one tenant, but not for another.

For more information on support levels, see [Application support for domain separation](#) .

How domain separation works in Planned Maintenance

There is no sys_domain column in the Maintenance Plan (sm_maint_plan) table. The application cannot be exposed to customer fulfillers; however, the table is condition-based so there is some limited support.

You can set maintenance plans to include or exclude domains or set them globally by design. Support in the Part Requirements (sm_part_requirement) table is data only.

Related topics

[Domain separation for service providers](#) 

Request Management in a Service Management application

Agents regularly access request records as they resolve requests and correspond with the submitters. They can also access built-in reports to see information like the number of active or unassigned requests for an SM application.

Request creation

Requests are created differently based on the role that has been granted to the user. Department administrators can create requests differently than an employee can.

Create a request through a catalog

The catalog provides several different categories so users can choose the one that closely relates to their request.

Procedure

1. Open **Field Service Catalog**.
2. Choose from the displayed categories.
3. Select a subcategory, if necessary.
4. Fill in the fields on the form.

Note: Each catalog can display different fields. The following is a list of fields displayed when you select Service Management catalog.

Catalog fields

Field	Description
Opened for	The name of the person submitting this request. Select a new name if you are opening this request on behalf of another user.
Location	The location for this request.
Priority	The priority that describes the importance of this request.
Short Description	A brief summary of the request.
Detailed Description	A detailed description of the request.

5. Click **Submit**.

Note: If the catalog fields do not appear on the request form, you can configure the form and add variables or variable sets.

Request creation using inbound email actions

Requests can be automatically created or updated from the information in inbound emails as long as the functionality has been enabled on the configuration screen of SM application. The emails are also to be sent to a mailbox defined by criteria in the appropriate inbound email action.

After the functionality has been enabled by selecting the **Requests can be created and updated by inbound email** option on the application configuration screen, three inbound email actions are available for the SM applications available in the base system. These inbound email actions are also available for new applications created using the SM application creator.

Related topics

[Email and SMS notifications](#) 

[Inbound email actions](#) 

Create a request from an inbound email

Requests can be automatically created from the information in inbound emails as long as the functionality has been enabled on the configuration screen of SM application. The emails are also to be sent to a mailbox defined by criteria in the appropriate inbound email action.

Procedure

1. Navigate to **All > System Policy > Email > Inbound Actions**.

2. Select the inbound email action.

For example, **Create Work Order**.

The inbound email action record opens and displays the default conditions that trigger the inbound email action.

When an email is sent to the mail list defined by the criteria in **Actions**, a request is created with the following information:

- The **Contact type** is set to **Email**.
- The email sender (if found) populates the **opened_by** and **Caller** fields for a newly created sm_order based item.
- The email subject populates the **Short description** field.
- The email body populates the **Description** field.
- The email senders company (Sender->Company) populates the **Company** field.
- The email senders location (Sender->Location) populates the **Location** field.
- The entire email is copied into the **Work notes** field.

3. You can use the email action as it is or modify it to meet the needs of your organization.

Create a request from a forwarded inbound email

Requests can be automatically created from the information in forwarded inbound emails as long as the functionality has been enabled on the configuration screen of SM application. The emails are also to be sent to a mailbox defined by criteria in the appropriate inbound email action.

Procedure

1. Navigate to **All > System Policy > Email > Inbound Actions**.

2. Select the inbound email action called **Create [application name] Request (Forwarded)**.

The forwarded inbound email action record opens and displays the default conditions that trigger the inbound email action.

When an email is forwarded to the mail list defined by the criteria in **Action**, a request is created with the following information:

- The **Contact type** is set to **Email**.
- The email sender (if found) populates the **opened_by** and **Caller** fields for a newly created sm_order based item.
- The email subject populates the **Short description** field.
- The email body populates the **Description** field.
- The email senders company (Sender->Company) populates the **Company** field.
- The email senders location (Sender->Location) populates the **Location** field.
- The entire email is copied into the **Work notes** field.

3. You can use the email action as it is or modify it to meet the needs of your organization.

Update a request from an inbound email

Requests can be automatically updated from the information in inbound email replies as long the functionality has been enabled on the SM application's configuration screen. The emails must also be sent to a mailbox defined by criteria in the appropriate inbound email action.

Procedure

1. Navigate to **All > System Policy > Email > Inbound Actions**.
2. Navigate to the inbound email action called **Update [application name] Request** and click its **Name**.
The update inbound email action record opens and displays the default conditions that trigger the inbound email action.

When an email reply is received in the mail list defined by the criteria in the email action, the associated request is opened and update information is added to the **Work notes** field.

3. You can use the email action as is or modify it to meet the needs of your organization.

Request states

Service Management requests follow a specific life cycle and move through a series of states, which are displayed in the **State** field on the request record.

The request states displayed depend on the SM application, as indicated in the table.

Note: The **State** field on the request record is always read-only.

Service management request states

State	Description
Draft	Request initiator adds information about the work to be done.
Awaiting Qualification	Initiator fully describes the request, and qualifier can process the request. This state is valid only for the following SM applications: <ul style="list-style-type: none"> • Field Service Management
Qualified	Request is fully qualified, meaning that all technical information to complete the request tasks has been added, but work has not started. This state is valid only for the following SM applications: <ul style="list-style-type: none"> • Field Service Management
Awaiting Approval	When the information is complete enough for review by an approver, the request is marked ready for approval. This state is valid only for the Facilities Service Management application.
Approved	The appropriate approver approves the request. This state is valid only for the Facilities Service Management application.
Work In Progress	Work has started.
Closed Complete	Request was completed to specification.

Service management request states (continued)

State	Description
Closed Incomplete	Request could not be completed as specified.
Canceled	Request was canceled.

In addition to the **State** field, the different request task states are also shown visually at the top of each task record with the process flow formatter.

i Note: If the **State flows are enabled** option in the configuration screen is not selected, the process flow formatter is removed. If you added states to the request and task tables, those states are visible on the request form.

Request approvals

Approving a request in an SM application means that the request is ready for task creation and assignment.

When a request is sent to a user with the [SM application]_approver_user role, the approver has several choices. If you select **Approval is required for new requests** in the applications Configuration screen, a newly created request automatically moves to the **Awaiting Approval** state. Otherwise, the request moves to the next configured state.

Request approval states

Approval Choice	Description
Approved	The request is approved.
Rejected	The request is not qualified and it is moved to the canceled state. Also, the following work note is added to the request: The [SM application] request is rejected.
More information required	The request does not contain enough information. It reverts to the Draft state and the following work note is added to the request: The [SM application] request needs more information for further approval.
Duplicate	The request is no longer required, because another request has already performed the work. The request is moved to the Cancelled state and the following work note is added to the request: This is a duplicate [SM application] request.

Agent assignment methods

Depending on your settings in the SM application's configuration screen, you can assign agents manually or using auto-assignment.

Manually assign agents to active requests

Use this procedure to assign agents to active requests in service management (SM) applications.

Procedure

1. Navigate to one of the following modules:

- **[SM application] > Open - Unassigned** for a list of requests that no one is assigned to.
- **[SM application] > All [SM application] Requests** for a list of all open requests, regardless of their current assignment.

2. Open the request you want to assign.

3. In the **Assignment group** field, enter the group that handles this kind of request.

If no groups are available, leave this field blank. To look up the assignment group, click the reference lookup icon () beside the **Assignment group** field.

Note: You do not have to select an assignment group, but doing so limits the users you can assign the request to.

4. In the **Assigned to** field, enter the agent to handle this request.

To look up an agent, click the lookup icon () beside the **Assigned to** field.

Note: If one was selected, the users in the search results are limited to the users in the **Assignment group**.

5. Click **Update**.

An email notification is automatically sent to the assigned agent when email notifications are set up for the instance.

Agent auto assignment

When auto assignment is enabled and a task is qualified or marked as **Ready for Work**, an appropriate agent is automatically assigned to the task and it is moved to the **Assigned** state. If the task cannot be auto-assigned, a user with the dispatcher role must adjust the values in the request or task form and then save the record.

The Auto-Assignment feature can be enabled for requests or tasks, depending on the configuration settings of Service Management (SM) application:

- If the *Requests are assigned via auto-assignment* option is enabled, requests are automatically assigned.
- If the *Tasks are assigned via auto-assignment* option is enabled, the tasks in a request are automatically assigned.

Agent auto assignment using rating-based criteria

Rating-based methods, such as location, skills, and time zones, help to auto assign agents based on configuration settings and optional properties. The calculated ratings are used to determine the best agent to perform the task.

Any combination of rating-based methods can be enabled in configuration screen of the application.

When a task is created, a rating for each type of enabled selection criteria is calculated for each available agent. The agent whose average rating is highest is considered for auto-assignment.

The settings for the auto-assignment weighting properties, found in **[SM application] >**

Administration > Properties, are included in the rating calculations.

These values help you prioritize which auto-assignment selection criteria is more important to your organization. The priority values should be [1, 10] and they are factored between 1 and 0. That is, 10 is a factor of 1, 5 is a factor of 0.5, and so on. For an example of how the weighting properties affect agent ratings, see [Agent auto assignment using multiple selection criteria](#).

Agent auto assignment using location

Agents can be auto assigned based on the location defined in their user record and the location of the tasks.

Auto assignment by location can be performed in a [task- or request-driven processing](#) environment when the **Auto-selection of agents will consider location of agents** configuration is enabled.

When a task is created, agent locations are compared to the following ranges to determine a location rating for each agent.

Location rating calculation

Distance (mi.) from agent to task	Rating
0–0.1	1
0.11–0.5	0.9
0.51–5	0.7
5.1–10	0.5
10.1–20	0.4
20.1–30	0.3
30.1–40	0.2
40.1–100	0.1
>100	0

When a task is qualified or marked as **Ready for Work**, the agent closest to the task location is considered for the task. If the application is configured so that only location is considered, the closest agent is auto-assigned to the task.

If the application is configured to use other selection criteria—such as skills, time zone, or schedule—the ratings of all selection criteria are averaged, and the agent with the highest overall rating is auto-assigned for the task. See [Agent auto assignment using multiple selection criteria](#) for details.

Agent auto assignment using skills

Agents can be auto assigned based on the skills of an agent, and the skills required to perform the task. Assign skills to an agent user records using **Skills > Users**.

Auto assignment by skills can be performed in either a [task- or request-driven processing](#) environment when the **Auto-selection of agents for tasks requires them to have skills** configuration option must be set to **all** or **some** for the application.

When a task that includes skills is qualified or marked as **Ready for Work**, skills of each agent are compared with the skills required to perform the task, and a rating is calculated based on the skills configuration option. If the option is set to **some**, the agent with the closest skills match is auto-assigned the task. If the option is set to **all**, only agents who possess all the required skills are considered. If no agents possess all the skills required to perform the task, none are auto-assigned.

Skills rating of an agent is calculated as:

$\text{Skills_agent} / \text{Skills_task}$

When:

- **Skills_agent** is the number of skills possessed by the agent that match the skills required for the task.
- **Skills_task** is the total number of skills required for the task.

For example, if a task requires four skills, and Agent A possesses three of them and Agent B possesses two of them:

- Skill rating of Agent A = $3/4$ or 0.75
- Skill rating of Agent B = $2/4$ or 0.5

If the application is configured to use other selection criteria, such as location or time zone, the ratings of all selection criteria are averaged, and the agent with the highest overall rating is auto-selected for the task. See [Agent auto assignment using multiple selection criteria](#) for details.

Agent auto assignment using time zones

Agents can be auto assigned based on the time zone defined in their user records and the time zone of the tasks.

Auto assignment by time zone can be performed in either a [task- or request-driven processing](#) environment when the **Auto-selection of agents will consider time zone for the task** configuration option must be enabled for the application.

When a task is qualified or marked as **Ready for Work**, agents in the time zone closest to the task time zone are considered for the task. If the application is configured so that only time zone is considered, an agent in the same time zone is auto-assigned the task.

Note: It is important that the time zones for the agent and the task are set correctly.

When a task is created, agents are rated based on the time zones of both task and agent using the following formula:

$$1 - [\text{abs}(\text{Task_tz} - \text{Agent_tz}) \div 12]$$

Where:

- **abs** is the mathematical function to compute the absolute value.
- **Task_tz** is the offset between the time zone of the task and GMT.
- **Agent_tz** is the offset between the time zone of the agent and GMT.

For example, a task is created in New York City (GMT-4), and two agents are available to perform the task, one in Los Angeles (GMT-7) and one in Paris, France (GMT+1).

The rating of the agent in Los Angeles is calculated as:

$$1 - \text{abs}((-4) - (-7)) \div 12 \text{ or } 0.75$$

The rating of the agent in Paris is calculated as:

$$1 - \text{abs}((-4) - (+1)) \div 12 \text{ or } 0.58$$

So if the auto assignment of the task is based on the time zone alone, it is assigned to the agent from Los Angeles.

If the application is configured to use other selection criteria, such as skills or location, the ratings of all selection criteria are averaged, and the agent with the highest overall rating is auto-selected for the task. See [Agent auto assignment using multiple selection criteria](#) for details.

Agent auto assignment using time-based criteria

Time-based methods, such as schedules and priority assignment, help you auto assign agents based on configuration settings and optional properties. The calculated ratings are used to determine the best agent to perform the task.

Any combination of time-based methods can be enabled in the application configuration screen.

When a task is created, the schedule of the agent and the task to be performed are combined with rating-based criteria to auto-assign an agent.

Agent auto assignment using schedules

Agents can be auto assigned based on the agent or the task schedule.

Auto assignment by schedule can be performed only in a [task-driven processing](#) environment, and the **Auto-selection of agents will consider agent or task schedules** configuration option must be enabled for the application. If this option is turned off, only the [agent ratings](#) are used for auto-assignment.

When a task is qualified or marked as **Ready for Work**, agents ratings are evaluated, and the schedules of qualified agents are compared against the schedule of the task to determine the agent with the best matching schedule.

Note: If the task includes specific time entries in the **Window start** and **Window end** fields, and no schedule of an agent falls within that task window, no agents are assigned. Also if the customer wants a task to be performed at or near a specific time, the **Window start** time should be set as close to that time as possible. For example, the **Window start** and **Window end** fields are set to 1:00 pm and 8:00 pm respectively. The customer prefers the job to be started at 4:00 pm. It is possible that an agent is dispatched at 13:00. So, setting the **Window start** closer to 4:00 can help ensure that the work is performed when the customer prefers it to be done.

If the application is configured to use other selection criteria, such as skills or time zone, the ratings of all selection criteria are averaged, and the agent with the highest overall rating is auto-selected for the task. See [Agent auto assignment using multiple selection criteria](#) for details.

Agent auto assignment using priority assignment

The priority assignment feature enables you to configure auto assignment so that agents can be assigned to perform tasks or provide services on a continual, 24x7x365 basis. Priority assignment is triggered when the priority of a task matches the priority set in the application configuration page.

Priority assignment can be used with location and skills settings. However, it can also operate independently.

To use priority assignment, you must set the following configuration options for the application.

Priority auto-assignment configuration options

Field	Description
Process life cycle	Set to task driven (subtasks are required) .
Assignment method for tasks	Set to auto-assignment .

Priority auto-assignment configuration options (continued)

Field	Description
Auto-selection of agents considers agent or task schedules	Enabled.
Enable priority assignment	Enabled.
Select priorities for assignment	Select one or more priorities.

Only tasks of the selected priority or priorities trigger auto-assignment based on priority assignment.

When a task is qualified or marked as **Ready for Work**, and the priority of the task matches a priority selected for the application, the agent that best matches the schedule of the task is auto-assigned. If the location and skills options are enabled, agents are first evaluated on their physical proximity to the location of the task, and then on how their skills match the skills required to perform the task. The agent whose location, availability, and skills best match the requirements of the task is auto-assigned.

When a task has a priority that matches a priority in the priority assignment list, the Location Rating and Timezone Rating are ignored, even if they have been enabled.

If the priority of a task matches a priority selected in the **Select priorities for assignment** option, and no agents in the assignment group are available to be auto-assigned, the task is assigned to the group manager, regardless of whether the manager is available. It is the responsibility of the manager to locate an agent to perform the task.

Note: If no agent is located in the same time zone as the task, priority assignment fails.

Agent auto assignment using multiple selection criteria

At its simplest, auto assignment involves identifying a set of selection criteria and automatically assigning the task to the agent who most closely meets the criteria. You can, however, select multiple sets of criteria, including both rating-based and time-based criteria.

When a task is qualified or marked as **Ready for Work**, the following evaluations are performed:

1. The ratings of an agent are calculated. If the **Auto-selection of agents will consider agent or task schedules** configuration option is disabled for the application, the ratings of an agent are used exclusively for auto-assigning an agent.

For more information on how the ratings are calculated, see:

- [Agent auto assignment using location](#)
- [Agent auto assignment using skills](#)
- [Agent auto assignment using time zones](#)

2. If the **Auto-selection of agents will consider agent or task schedules** configuration option is enabled, the schedules of the agents whose ratings are acceptable for auto-assignment are compared to the schedule for the task, and the agent with the best match is auto-assigned. For more information on time-based methods for auto-assigning agents, see:

- [Agent auto assignment using schedules](#)
- [Agent auto assignment using priority assignment](#)

Auto assignment is based on the following calculation:

$$\frac{(\text{Criteria_1 rating} \times \text{Criteria_1 weight}) + (\text{Criteria_2 rating} \times \text{Criteria_2 weight}) + (\text{Criteria_3 rating} \times \text{Criteria_3 weight})}{\text{Number of criteria types used}}$$

Where:

- Number of criteria types used = 1, 2, or 3 depending on the location, skill, and time zone settings used.

This example calculates agent auto-assignment based on location and skills. The example is based on the following assumptions.

- The **Auto-selection of agents will consider location of agents** configuration option is enabled for the application.
- The **Auto-selection of agents requires them to have some of the required skills for the task** configuration option is enabled for the application.
- The **Skills Weight** property is set to 10 for the application.
- The **Location Weight** property is set to 5 for the application.
- Agents A and B are available to perform a task, and the task requires four specific skills.
- The location of Agent A is 5 miles from the site of the task. Agent A possesses three of the four required skills.
- The location of Agent B is one-quarter mile from the site. Agent B possesses two of the required skills.

Auto assignment for the agents uses this calculation:

$$[(\text{Location rating} \times \text{Location weight}) + (\text{Skills rating} \times \text{Skills weight})] / 2$$

- The auto assignment calculation for Agent A is: $[(0.7 \times 0.5) + (0.75 \times 1)] / 2 = 0.55$
- The auto assignment calculation for Agent B is: $[(0.9 \times 0.5) + (0.5 \times 1)] / 2 = 0.475$

In this example, Agent A is auto assigned the task.

Collaborate on a request

Within a request, you can enter comments that are visible to the submitter, allowing for collaboration between the two of you. For collaboration with other agents, you can enter comments that are not visible to the submitter.

Procedure

1. Navigate to **All > [SM application] > All [SM application] Requests**.
2. Open the request you want to collaborate on.
3. In the **Additional comments** (Customer visible) field, enter the comments that you want the person who submitted the request to see.
The submitter can see the comments in this field and add more comments as necessary.
Update this field as many times as necessary to correspond with the submitter.
4. To correspond with other agents, enter content that you do not want the submitter to see in the **Work notes** field.

Close a request

When you close a request, you can add details that you want the submitter to be aware of.

Procedure

1. Navigate to **All > [SM application] > Assigned to me**.
2. Click the request number.
3. In the **Additional comments** field, enter any final notes or comments.
4. Change the **State** field to the appropriate closed state.
5. Click **Update**.

Closed and completed requests

When the **Request lifecycle** option is set to **request-driven**, the assigned agent can complete and close the request once all the tasks in the request are complete.

A **Close Complete** button is visible to the agent assigned to the request. The agent enters work notes before clicking **Close Complete**. When the button is clicked, the open task is automatically completed (if applicable) and the request transitions to the **Complete** state.

Note: To view all closed tasks, navigate to **All > Field Service > All Work Orders** and enter **Close Complete** in the **State** field.

Request task management

A request contains one or more tasks. These tasks allow qualifiers to define activities that must be done to complete a request.

Administrators can create multiple tasks under a single request.

Splitting a request into separate tasks, when necessary, enables qualifiers to do the following:

- Assign different aspects of a request to different staff members.
- Assign tasks to staff members who have different set of skills, or are in different locations.
- Schedule tasks so they are either done one after another, or at the same time by different staff members.
- Schedule additional tasks, if necessary, to complete the request.

Note: If you have the Request life cycle is request driven configuration option activated, you can manually add tasks as needed. If you have Request life cycle is task driven activated, an initial task is automatically created when the request record is created.

Configuration Overview

Optionally, set up one or more additional request task management configurations:

- [Task windows](#)

Set a task window to define the time period for performing the task by specifying the start and end dates.

- [Create a task template for common task requests](#)

Create task templates to efficiently manage frequently repeated tasks across multiple jobs. By reusing these templates in various request templates, you save time and ensure consistency.

Task templates can also be used in Work Order requests to automatically include common information, streamlining the process and minimizing errors.

- [Clone a request task](#)

Clone an existing task to save time and ensures consistency by allowing administrators to quickly replicate tasks while reducing errors and enabling easy customization.

Related topics

[Change the location of a request](#)

[Request approvals](#)

[Collaborate on a request](#)

[Close a request](#)

Create request tasks

Tasks are created in support of requests.

Before you begin

Role required: [SM application]_admin or [SM application]_qualifier

Procedure

1. Navigate to **All > [SM Application] > Requests > All [SM Application] Requests**.
2. Open the request for which you want to create tasks.
3. Click the **Add Task** related link.
The Task screen for the SM application opens.
4. Fill in the fields on the form.

Note: Not all fields display for all SM applications.

Request task fields

Field	Description
Number	Auto-generated identification number for the task.
Parent	Request that this task is associated with.
Cloned from	Record number of the task this task was cloned from, if any.
Location	Geographical area where the work must be done. The location is critical for determining the staff member who is assigned to the task.
Template	Template for creating this request (optional). Click the lookup icon and select a template. The description of the selected template populates the Description field.
Skills	Abilities necessary to execute the task. This field is automatically completed based on the selection in the Affected CI field on the associated request. If you change the affected CI on the request, the system adds any skills required by the new CI to the skills already listed here.
State	Current state of the task, such as Accepted or Closed Complete . ServiceNow advances the state automatically as users complete the work for each successive state.

Field	Description
Assignment group	Group from which an individual legal staff member is selected to complete the task. The lookup list shows only the assignment groups associated with the selected Location . If the Assignment Group field is empty, the system searches for a group covering the territory that includes the location of the task.
Assigned to	Individual staff members who should complete the task, selected from the Assignment group . If you defined skills and assigned them to staff members, the Assigned to field lookup list shows only those staff members in the assignment group who have all the Skills required. If no exact match of skills is found, the lookup list shows all assignment group members. Note: If state flows are disabled, this field is not mandatory.
Short description	Brief explanation of the task.
Description	Exact technical description of the unit of work to be performed. Qualifiers should provide as much detail about the problem as possible to avoid extra communication with the caller in later stages of the request.
Work notes	Information about the task as it progresses through each state. Work notes are not visible to customers.

Note: The workflow appears at the top of the form, with the completed states shown in green.

Request task states

Like requests, the associated request tasks follow a specific life cycle and move through a series of states, which are displayed in the **State** field on the task record.

The request task states displayed depend on the SM application, as indicated in the table.

Note: The **State** field on the request task record is always read-only.

Service management request task states

State	Description
Draft	Qualifier is not done describing the work.
Pending	Request task is ready to be assigned. Depending on the SM application, this state label may be expanded, for example, Pending Dispatch or Pending Change . The parent request state can change to Qualified , for example, if all associated tasks are in Pending Dispatch or a later state.
Assigned	Request task is pending acceptance from the assigned agent.
Accepted	Agent accepts the request task and is ready to be done.
Work In Progress	Work on the request task has started. The parent request state changes to Work In Progress if no associated tasks are in Draft state.
Closed Complete	Request task was completed to specification.

Service management request task states (continued)

State	Description
Closed Incomplete	Request task could not be completed as specified.
Canceled	Request task was canceled.

In addition to the **State** field, the different request task states are also shown visually at the top of each task record with the process flow formatter.

Note: If the **State flows are enabled** option in the configuration screen is not selected, the process flow formatter is removed.

Task windows

A task window is the time period, bordered by start and end times, in which a task is performed.

Task windows can be flexible or fixed, and are used by the route optimization and auto-dispatch features when determining the daily schedule of staff members. A flexible window has start and end times that the application attempts to respect when dispatching or routing a task automatically. The system can reschedule a flexible task window if necessary, to make it fit into the schedule of a staff member. A fixed task window cannot be rescheduled. If the auto-router that optimizes task routes or the auto-dispatcher cannot schedule the task for the fixed window time period, that task is not scheduled at all. The time interval configured for a window cannot be less than the time required to perform the task.

For more information on creating work order tasks, see .

For more information on Work order task start and end dates, see .

Create a task template for common task requests

If you have tasks that are often repeated across multiple jobs, you can create and reuse a task template in multiple request templates. You can also use it on a Work order request to pull common and repeatable information into a request.

Before you begin

Role required: `wm_admin`

Create a request template and an associated task template that contains the information you want to reuse.

Note: Checklist templates are a way to populate a checklist of tasks to be completed. Checklist templates are created on a Work order request or on a Work order task. After being created, they can be saved as a template and be reused.

When you create subsequent request templates, you can select the task template from the **Task Template** field and save the file.

About this task

A work order outlines the entire request or process. A work order task are the detailed steps for the parent work order. Every work order needs at least one work order task to get assigned to a specific agent to finish that step. Every work order task must have a parent work order to track the request.

Sometimes work orders are opened with the same purpose, and these work orders should have similar flows and similar work order tasks. A work order template can be used to fill in some fields in the work order, and create work order tasks.

The difference between a work order template and task template is you can't create a task template alone, it must be part of the work order template. Creating a task template is a step of creating a work order template since you can define tasks and task templates for a work order or work order template.

With request tasks, work order tasks are not required, though they can be used. Request task management gives you the ability to split a request into multiple tasks. This document, Create a task template for common request tasks, describes the ability to use the work order task templates to apply them to common or repeated requests that you might have.

Procedure

1. Navigate to **All > Field Service > Catalog & Knowledges > Work Order Templates**.
2. Select **New** and enter the following information.

Work Order Template form

Field	Description
Name	A descriptive name for the Work order Template.
Short description	A short description of the template.
Description	A detailed description of the template.
Checklist template	A Checklist template saved from the Work Order Request Form.

3. Select **Add Task**.
4. Select **Copy Task Template** to use a previously created template, or enter the following information.

Work Order Task Template form

Field	Description
Task type	The type of task being requested.
Name	Descriptive name of the task.
Description	Detailed description of the task.
Parts and quantities	What parts and how many are needed to complete the task.
Dispatch group	The dispatch group to assign the task to.
Depends on	Indicates if the task depends on another task. For example, if you have two tasks, you can make task 2 dependent on task 1 completing before task 2 can start.
Checklist template	A Checklist template saved from the Work order Request Form.
Work type	The type of work being performed during the task.

5. Select **Submit**.

Clone a request task

Existing tasks can be cloned to create tasks with the same populated fields.

Before you begin

Role required: admin, ITIL, creator, or catalog admin

About this task

In the cloning process, the following information is copied from the source task:

- Parent request reference
- Short description
- Description
- Assignment group
- Location
- Required skills

Procedure

Open the request task and select **Clone Task** under **Related Links**.

The application creates a task in **Draft** state. The **Work Notes** field contains the original task number and text stating that the task is a clone.

Request Management Platform Analytics Solutions

Platform Analytics Solutions contain preconfigured dashboards. These dashboards contain actionable data visualizations that help you improve your business processes and practices.

Platform Analytics data visualizations use Performance Analytics **indicator** data to show you data over time, helping you analyze your business processes and identify areas of improvement. With Platform Analytics Solutions, you can get value from Performance Analytics for your application with minimal setup. You can always create your own objects as well.

Platform Analytics Solutions are available for both Requests and Requested Items Management. To enable a solution for Request Management, an admin can navigate to **Performance Analytics > Guided Setup**. Click **Get Started** then scroll to the section for Request Management. Select either the Requests or the Requested Items guided setup. You can follow both guided setups, in either order. The guided setup takes you through the setup and configuration process.

Inactive dashboards

Some dashboards in this content pack are inactive when installed. Complete configuration and run **data collection jobs** before you activate these dashboards. You can activate dashboards in Dashboard Properties, accessible from the context menu. You have to assign an owner to the dashboard to activate it.

Related topics

[Activate your Performance Analytics subscription](#) 

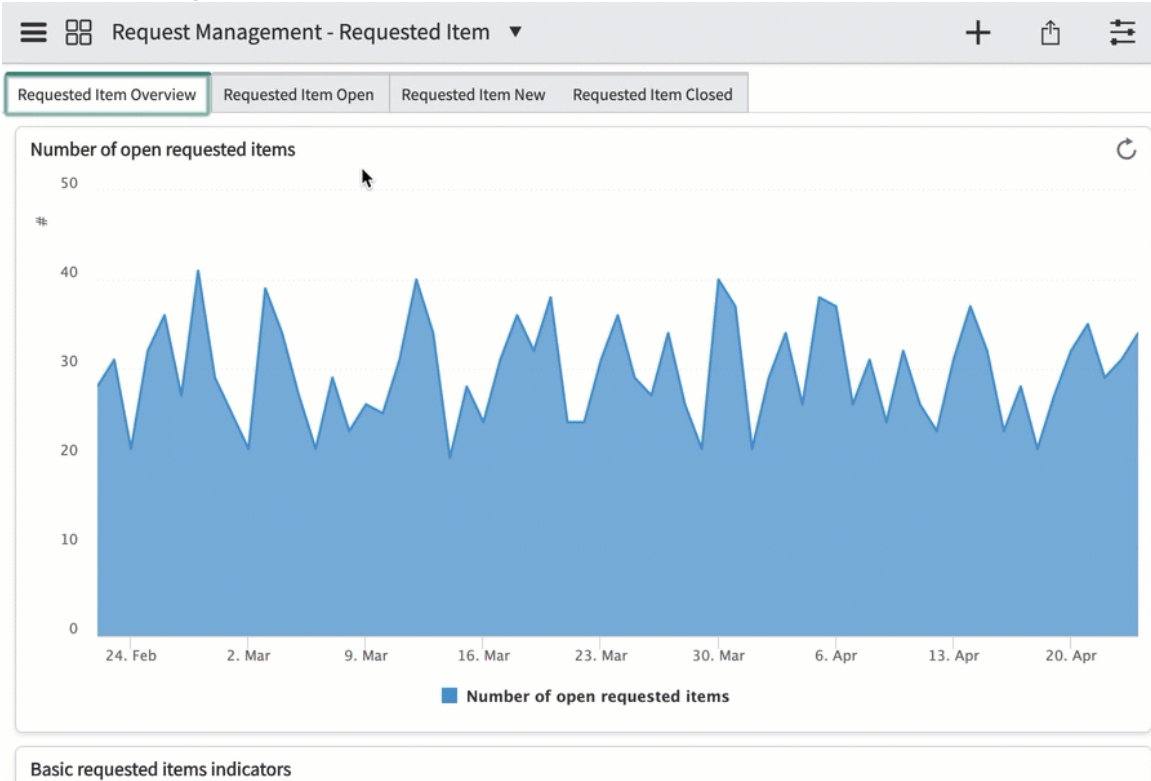
Legacy: Request Management - Requested Item dashboard

Track the progress of purchase orders, transfer orders, and software assignments.

Important:

Starting in Xanadu release, the Request Management Platform Analytics Solutions dashboards are deprecated. Users can use the [Request dashboard](#) to view the actionable data visualizations that help in improving the business processes and practices.

Request Management - Requested Item dashboard



End user and roles

End user and goal	Required role
Request manager who needs to track the rate of progress of item requests	sn_request_read, sn_request_write To see the 'Basic requested items indicators' widget, the pa_viewer role is necessary

Indicators

Indicators are displayed in Performance Analytics widgets.

Number of open requested items

Records on the Requested Item [sc_req_item] table opened on or before today and not closed.

Number of new requested items

Records on the Requested Item [sc_req_item] table opened today and not closed.

Number of closed requested items

Records on the Requested Item [sc_req_item] table closed today.

Average age of open requested item

The result in days of the formula $\frac{[[\text{Summed age of open requested item}]]}{[[\text{Number of open requested items}]] / 24}$

Average close time of requested items

The result in days of the formula $\frac{[[\text{Summed duration of closed requested items}]]}{[[\text{Number of closed requested items}]] / 24}$

Requested items backlog growth

The result of the formula $[[\text{Number of new requested items}]] - [[\text{Number of closed requested items}]]$

Indicators not appearing in dashboard widgets but used in formulas:

Summed age of open requested item

The aggregate sum of the RequestedItem.Age.Hours script. This script calculates the difference between the latest and the first time stamp for an open item request record.

Summed duration of closed requested items

The aggregate sum of the RequestedItem.CloseTime.Hours script. This script calculates the difference between the time stamp when an item request is opened and the time stamp of when it is closed.

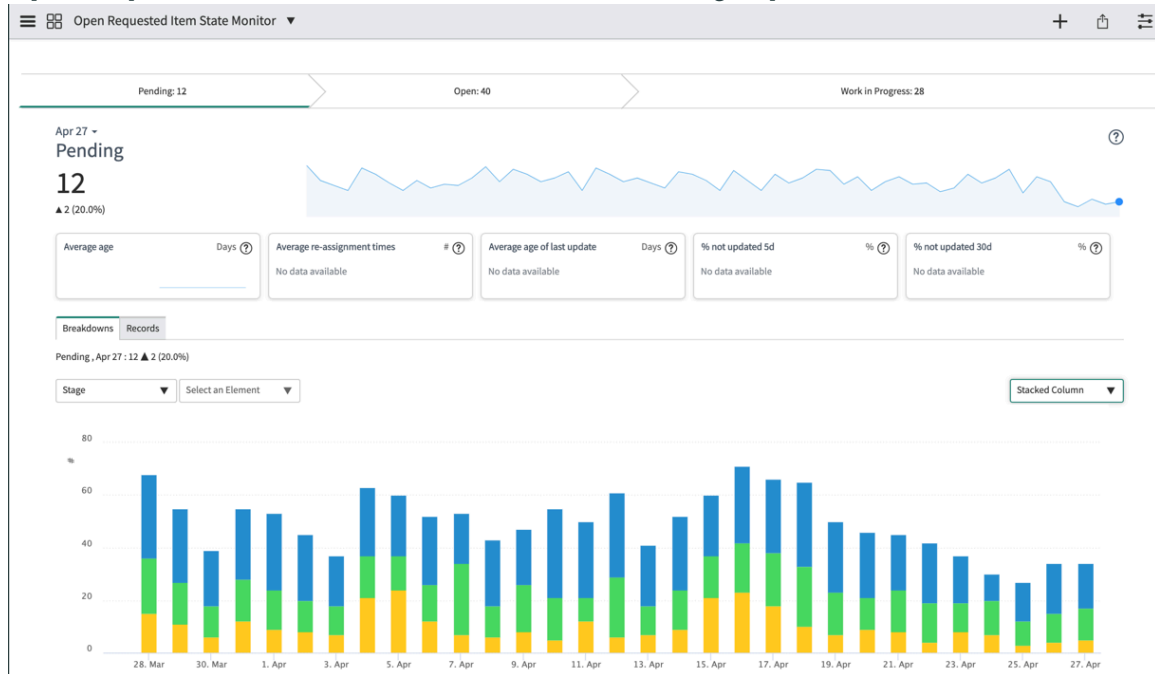
Breakdowns

- Age
- Assignment Group
- Priority
- Stage
- State

Open Requested Item State Monitor dashboard

Use this dashboard when you wish to dive into open requests for items divided by State: Pending, Work in Progress, or all Open requests.

Open Requested Item State Monitor focused on Pending requests



Indicators

Number of open requested items

Records on the Requested Item [sc_req_item] table opened on or before today and not closed.

Number of open requested item not updated in last 30 days

As Number of open requested items, but the Updated value is either empty or from more than 30 days ago.

Number of open requested item not updated in last 5 days

As Number of open requested items, but the Updated value is either empty or from more than five days ago.

% of open requested items not updated in last 30 days

Result of the formula (`[[Number of open requested items not updated in last 30 days]] / [[Number of open requested items]]`) * 100

% of open requested items not updated in last 5 days

Result of the formula (`[[Number of open requested items not updated in last 5 days]] / [[Number of open requested items]]`) * 100

Average age of updated since of open requested items

Result of the formula `[[Summed age of updated since of open requested item]] / [[Number of open requested items]] / 24`

Average age of open requested item

The result in days of the formula `[[Summed age of open requested item]] / [[Number of open requested items]] / 24`

Average re-assignment of open requested items

Result of the formula `[[Summed re-assignment of open requested item]] / [[Number of open requested items]] / 24`

Indicators not appearing in dashboard widgets but used in formulas:

Summed age of open requested item

The aggregate sum of the RequestedItem.Age.Hours script. This script calculates the difference between the latest and the first time stamp for an open item request record.

Summed re-assignment of open requested item

The aggregate sum of reassignment counts for open requested items

Summed age of updated since of open requested item

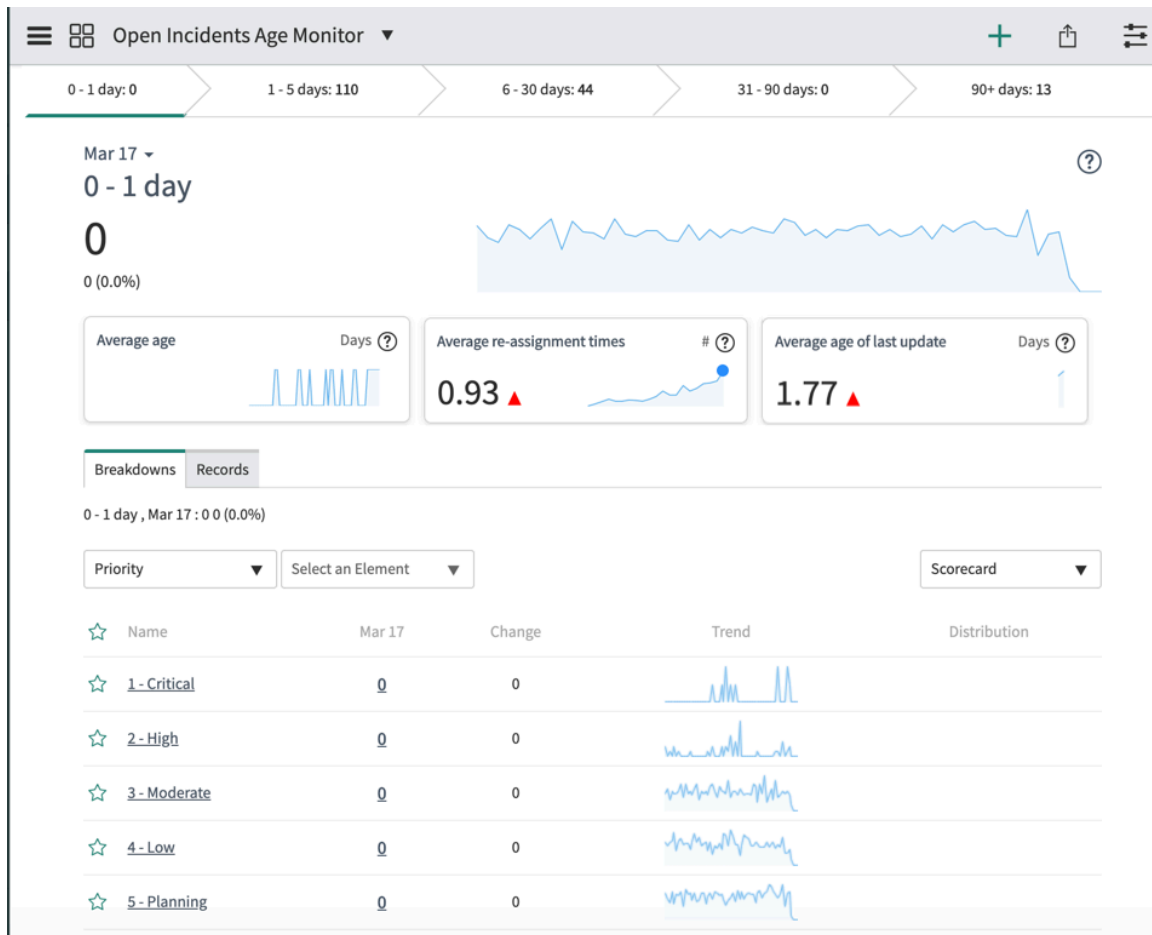
The aggregate sum of the results of the script RequestedItem.UpdatedSince.Hours. This script calculates the difference between the latest time stamp of an open request and the last time stamp of an update to that request.

Breakdowns

- Age
- Assignment Group
- Stage
- State

Open Requested Item Age Monitor dashboard

Use this dashboard when you wish to dive into open requests for items divided by Age.



Indicators

Number of open requested items

Records on the Requested Item [sc_req_item] table opened on or before today and not closed.

Average age of updated since of open requested items

Result of the formula $\frac{[[\text{Summed age of updated since of open requested item}]]}{[[\text{Number of open requested items}]]} / 24$

Average age of open requested item

The result in days of the formula $\frac{[[\text{Summed age of open requested item}]]}{[[\text{Number of open requested items}]]} / 24$

Average re-assignment of open requested items

Result of the formula $\frac{[[\text{Summed re-assignment of open requested item}]]}{[[\text{Number of open requested items}]]} / 24$

Indicators not appearing in dashboard widgets but used in formulas:

Summed age of open requested item

The aggregate sum of the RequestedItem.Age.Hours script. This script calculates the difference between the latest and the first time stamp for an open item request record.

Summed re-assignment of open requested item

The aggregate sum of reassignment counts for open requested items

Summed age of updated since of open requested item

The aggregate sum of the results of the script RequestedItem.UpdatedSince.Hours.
This script calculates the difference between the latest time stamp of an open request and the last time stamp of an update to that request.

Breakdowns

- Age
- Assignment Group
- Stage
- State

Open Requested Item Reports dashboard

To view the current state of open item requests, see the Open Requested Item Reports.

Open Requested Items Reports (inactive) ▼

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Open Requested Items List

Open Requested Items Pivot

Open Requested Items Heatmap

Number ▼	Short description	Priority	State	Assignment group	Assigned to
RITM0010004	CISCO Jabber	4 - Low	Pending	Technical Services Support	Beth Anglin
RITM0010003	Access	2 - High	Work in Progress	IT Securities	(empty)
RITM0010002	Packaging and Shipping	3 - Moderate	Work in Progress	Sales Systems Support	Bud Richman
RITM0000001	Apple iPad 3	4 - Low	Open	Sales Systems Support	Bud Richman

1

to 4 of 4

Assignment Group

All ▼

Requested Item Priori

All ▼

Requested Item State

☒ All
 ☒ Pending
 ☒ Open
 ☒ Work in Progress
 ☒ Closed Complete
 ☒ Closed Incomplete

Requested Item Open

All ▼

Data visualizations

Title	Type	Description
Open requested items - List	List	List of all requests for items that have not been closed
Open requested items - Pivot table	Pivot	Table letting you explore the number of open item requests by any combination of state, assignment group, and priority, for any age bucket or for all ages.
Open requested items - Heatmap	Heatmap	Heatmap letting you explore the number of open item

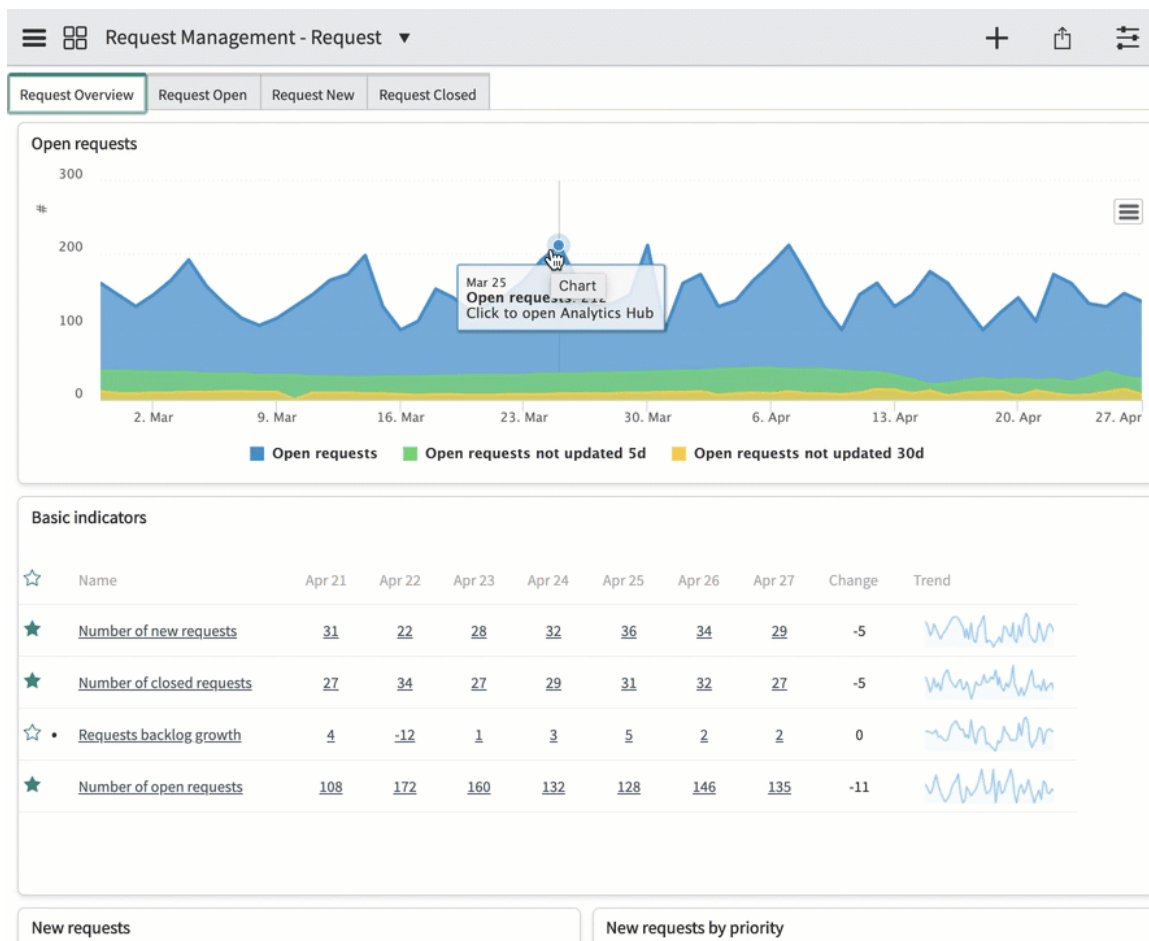
Title	Type	Description
		requests by any combination of state, assignment group, and priority, for any age bucket or for all ages.

Legacy: Request Management - Request dashboard

Track the progress of new requests through the time they are worked on until they are closed.

i Important:

Starting in Xanadu release, the Request Management Platform Analytics Solutions dashboards are deprecated. Users can use the [Request dashboard](#) to view the actionable data visualizations that help in improving the business processes and practices.



End user and roles

End user and goal	Required role
Request manager who needs to track the rate of progress of all requests	sn_request_read, sn_request_write To see the 'Basic indicators' widget, the pa_viewer role is necessary

Indicators

Number of open requests

Records on the Request [sc_req_item] table opened on or before today and not closed.

Number of new requests

Records on the Request [sc_req_item] table opened today and not closed.

Number of closed requests

Records on the Request [sc_req_item] table closed today.

Number of open requests not updated in last 5 days

As Number of open requests, but the Updated value is either empty or from more than five days ago.

Number of open requests not updated in last 30 days

As Number of open requests, but the Updated value is either empty or from more than 30 days ago.

Average age of open requests

The result in days of the formula $\frac{[[\text{Summed age of open request}]]}{[[\text{Number of open requests}]] / 24}$

Average close time of requests

The result in days of the formula $\frac{[[\text{Summed duration of closed requests}]]}{[[\text{Number of closed requests}]] / 24}$

Requests backlog growth

The result of the formula $[[\text{Number of new requests}]] - [[\text{Number of closed requests}]]$

Indicators not appearing in dashboard widgets but used in formulas:

Summed age of open requests

The aggregate sum of the Request.Age.Hours script. This script calculates the difference between the latest and the first time stamp for an open item request record.

Summed duration of closed requests

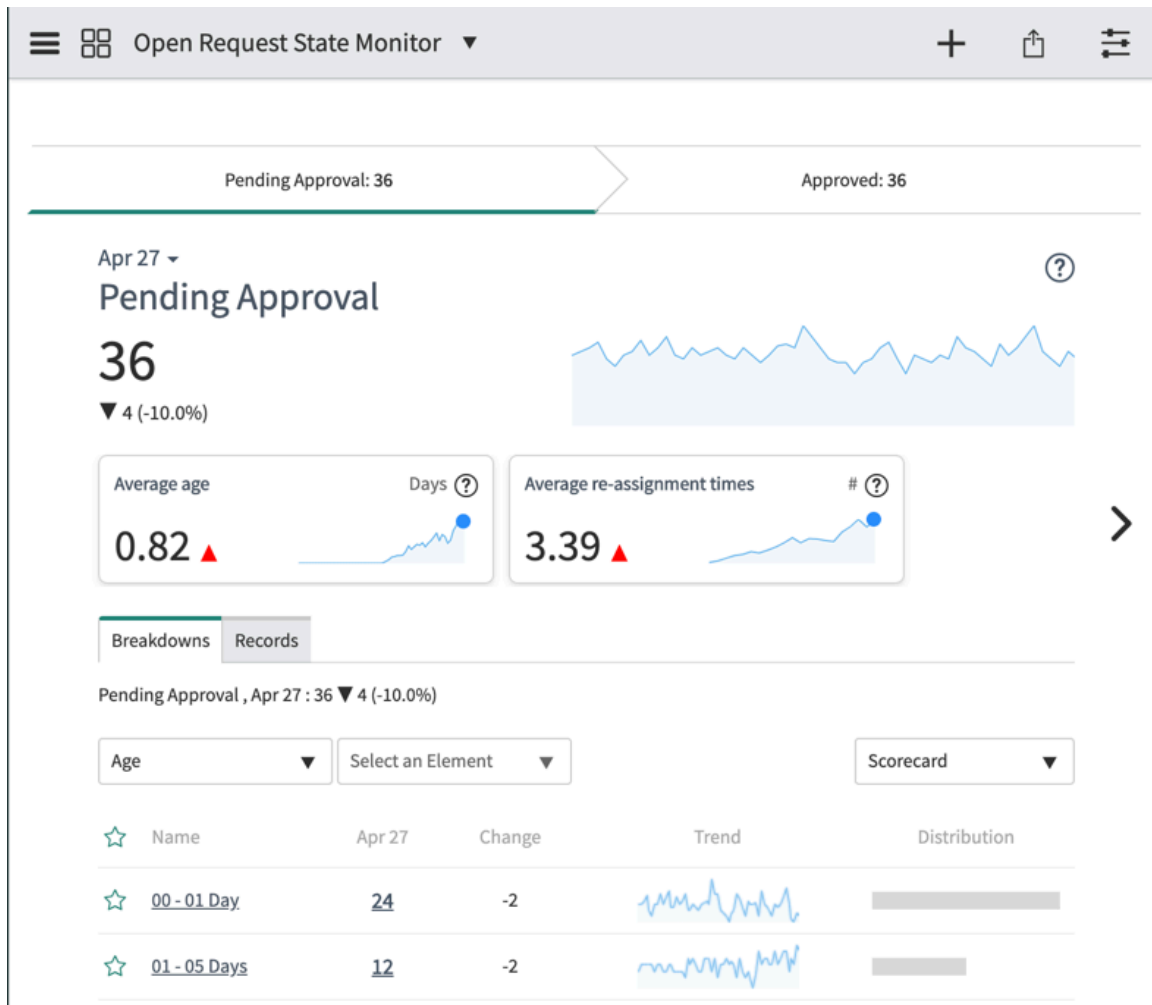
The aggregate sum of the Request.CloseTime.Hours script. This script calculates the difference between the time stamp when an item request is opened and the time stamp of when it is closed.

Breakdowns

- Age
- Assignment Group
- Contact Type
- Priority
- State

Open Requests State Monitor dashboard

Use this dashboard when you wish to dive into open requests divided by State: Pending Approval or Approved.



Indicators

Number of open requests

Records on the Request [sc_req_item] table opened on or before today and not closed.

Number of open request not updated in last 30 days

As Number of open requests, but the Updated value is either empty or from more than 30 days ago.

Number of open request not updated in last 5 days

As Number of open requests, but the Updated value is either empty or from more than five days ago.

% of open requests not updated in last 30 days

Result of the formula (`[[Number of open requests not updated in last 30 days]] / [[Number of open requests]] ) * 100`

% of open requests not updated in last 5 days

Result of the formula (`[[Number of open requests not updated in last 5 days]] / [[Number of open requests]] ) * 100`

Average age of updated since of open requests

Result of the formula `[[Summed age of updated since of open request]] / [[Number of open requests]] / 24`

Average age of open requests

The result in days of the formula $\frac{[[\text{Summed age of open request}]]}{[[\text{Number of open requests}]] / 24}$

Average re-assignment of open requests

Result of the formula $\frac{[[\text{Summed re-assignment of open request}]]}{[[\text{Number of open requests}]] / 24}$

Indicators not appearing in dashboard widgets but used in formulas:

Summed age of open requests

The aggregate sum of the Requests.Age.Hours script. This script calculates the difference between the latest and the first time stamp for an open item request record.

Summed re-assignment of open requests

The aggregate sum of reassignment counts for open requests

Summed age of updated since of open requests

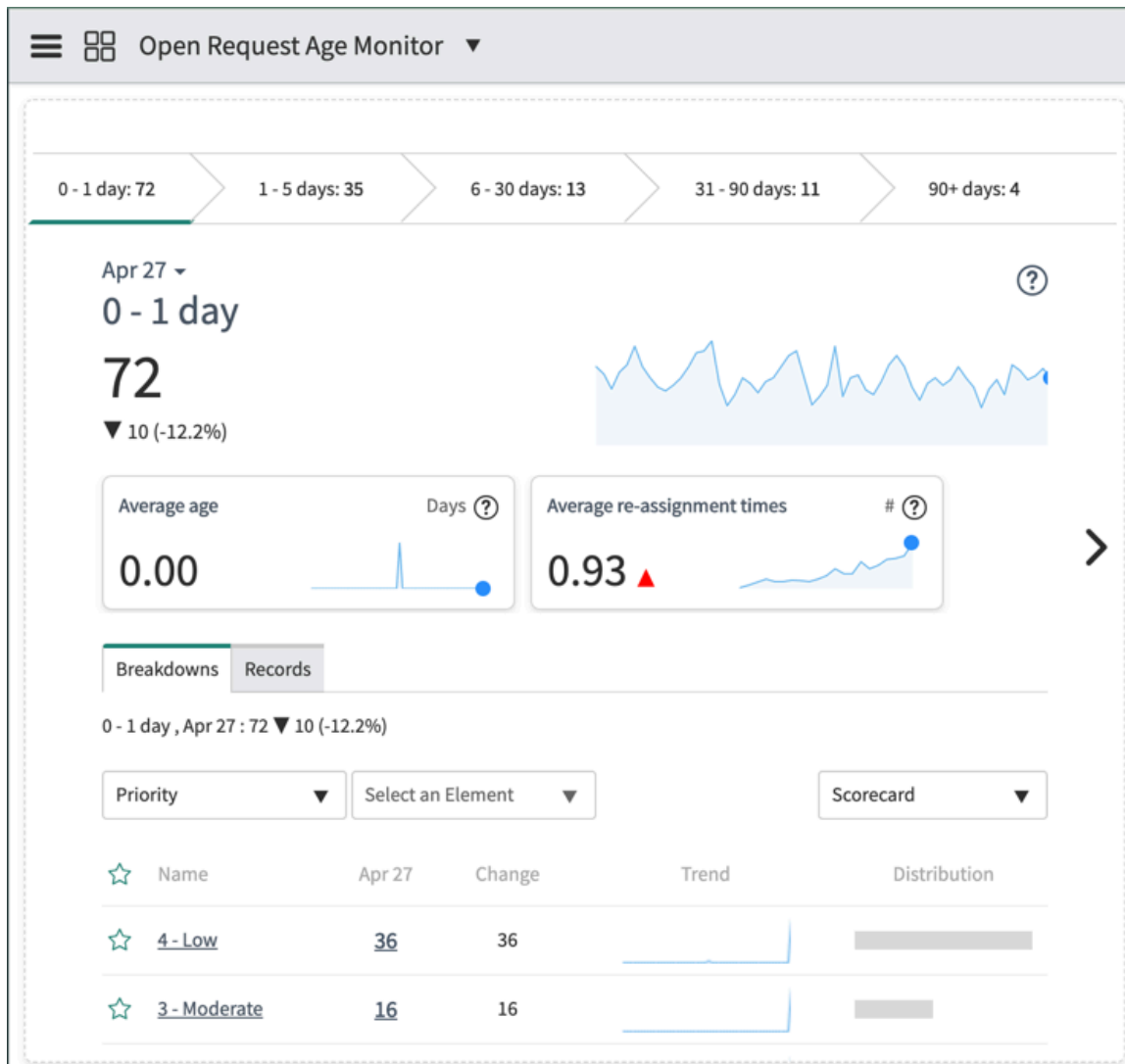
The aggregate sum of the results of the script Requests.UpdatedSince.Hours. This script calculates the difference between the latest time stamp of an open request and the last time stamp of an update to that request.

Breakdowns

- Age
- Assignment Group
- Priority
- State

Open Requests Age Monitor dashboard

Use this dashboard when you wish to dive into open requests divided by Age.



Indicators

Number of open requests

Records on the Request [sc_req_item] table opened on or before today and not closed.

Average age of updated since of open requests

Result of the formula $\frac{[[\text{Summed age of updated since of open request}]]}{[[\text{Number of open requests}]]} / 24$

Average age of open request

The result in days of the formula $\frac{[[\text{Summed age of open request}]]}{[[\text{Number of open requests}]]} / 24$

Average re-assignment of open requests

Result of the formula $\frac{[[\text{Summed re-assignment of open request}]]}{[[\text{Number of open requests}]]} / 24$

Indicators not appearing in dashboard widgets but used in formulas:

Summed age of open request

The aggregate sum of the Requests.Age.Hours script. This script calculates the difference between the latest and the first time stamp for an open item request record.

Summed re-assignment of open request

The aggregate sum of reassignment counts for open requests

Summed age of updated since of open request

The aggregate sum of the results of the script Requests.UpdatedSince.Hours. This script calculates the difference between the last update of an open request (sys_updated_on) and the last second of yesterday (score_end) and returns negative value if sys_updated_on is after score_end.

Breakdowns

- Age
- Assignment Group
- Priority
- State

Open Request Reports dashboard

To view the current state of open requests, see the Open Request Reports.

The screenshot shows the 'Open Requests Reports' dashboard. It features a header bar with a menu icon, the title 'Open Requests Reports', and action icons. Below the header, there are three tabs: 'Open Requests List' (selected), 'Open Requests Pivot', and 'Open Requests Heatmap'. The main content area displays a table of open requests with columns: Number, Short description, Priority, State, Assignment group, and Assigned to. The table lists 11 requests, all with a state of 'Open' and an empty assignment group. To the right of the table, there are three filter sections: 'Assignment Group' (set to 'All'), 'Request Priority' (set to 'All'), and 'Request State' (with checkboxes for All, Pending, Open, Work in Progress, Closed Complete, and Closed Incomplete, all of which are checked). At the bottom right, there is a 'Request Opened' filter set to 'All'.

Number	Short description	Priority	State	Assignment group	Assigned to
REQ0010019		4 - Low	Open	(empty)	(empty)
REQ0010018		3 - Moderate	Open	(empty)	(empty)
REQ0010017		1 - Critical	Open	(empty)	(empty)
REQ0010016		2 - High	Open	(empty)	(empty)
REQ0010015		4 - Low	Open	(empty)	(empty)
REQ0010014		2 - High	Open	(empty)	(empty)
REQ0010013		4 - Low	Open	(empty)	(empty)
REQ0010012		3 - Moderate	Open	(empty)	(empty)
REQ0010011		3 - Moderate	Open	(empty)	(empty)
REQ0010010		3 - Moderate	Open	(empty)	(empty)
REQ0010009		3 - Moderate	Open	(empty)	(empty)

Data visualizations

Title	Type	Description
Open requests - List	List	List of all requests that have not been closed

Title	Type	Description
Open requests - Pivot table	Pivot 	Table letting you explore the number of open requests by any combination of state, assignment group, and priority, for any age bucket or for all ages.
Open requests - Heatmap	Heatmap 	Heatmap letting you explore the number of open requests by any combination of state, assignment group, and priority, for any age bucket or for all ages.