



Operation manual for creating ServiceNow Incident Tickets via Teams

ODC-C

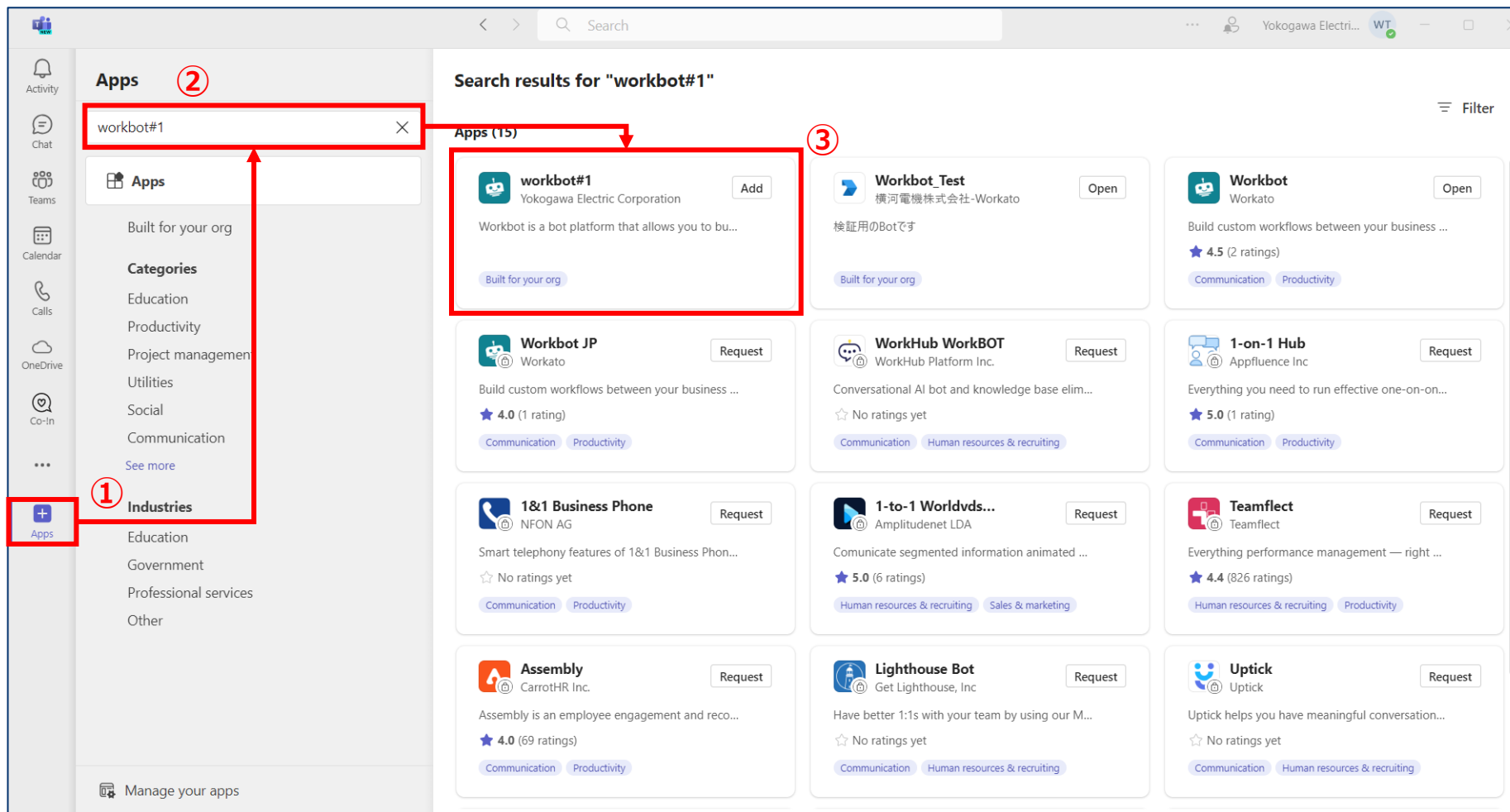
Aug 10, 2024

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1. Activate the “workbot#1”

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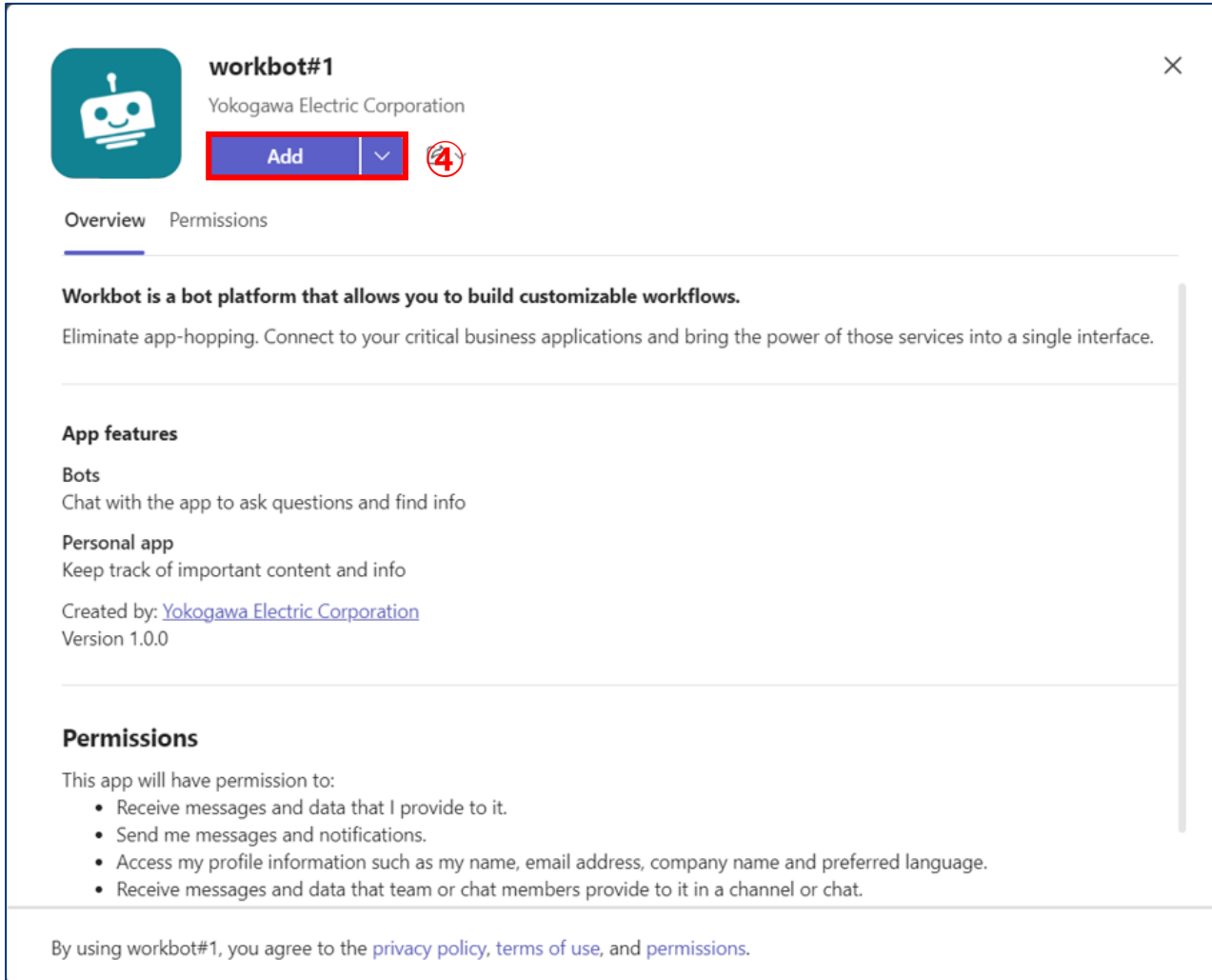


■ ① Open Apps list
Click the “Apps” button in Teams.

■ ② Search “workbot#1”
Enter “workbot#1” in the search box to search.

■ ③ Select “workbot#1”
Click “workbot#1” app in the Apps list.

1. Activate the “workbot#1”



The screenshot shows the Microsoft Teams app catalog interface for the 'workbot#1' app. At the top, there is a header bar with the app's icon (a teal robot head), the name 'workbot#1', and the publisher 'Yokogawa Electric Corporation'. Below this, there is a red rectangular box highlighting the 'Add' button and a dropdown arrow. To the right of the 'Add' button is a red circle with a white '4' inside, indicating a step number. Below the header, there are two tabs: 'Overview' (selected) and 'Permissions'. The 'Overview' tab contains the following text: 'Workbot is a bot platform that allows you to build customizable workflows. Eliminate app-hopping. Connect to your critical business applications and bring the power of those services into a single interface.' Below this, there is a section titled 'App features' with two sub-sections: 'Bots' (Chat with the app to ask questions and find info) and 'Personal app' (Keep track of important content and info). Below the features, it says 'Created by: [Yokogawa Electric Corporation](#)' and 'Version 1.0.0'. Below the features, there is a section titled 'Permissions' with the text 'This app will have permission to:' followed by a list of permissions: 'Receive messages and data that I provide to it.', 'Send me messages and notifications.', 'Access my profile information such as my name, email address, company name and preferred language.', and 'Receive messages and data that team or chat members provide to it in a channel or chat.' At the bottom, there is a footer that says 'By using workbot#1, you agree to the [privacy policy](#), [terms of use](#), and [permissions](#).'

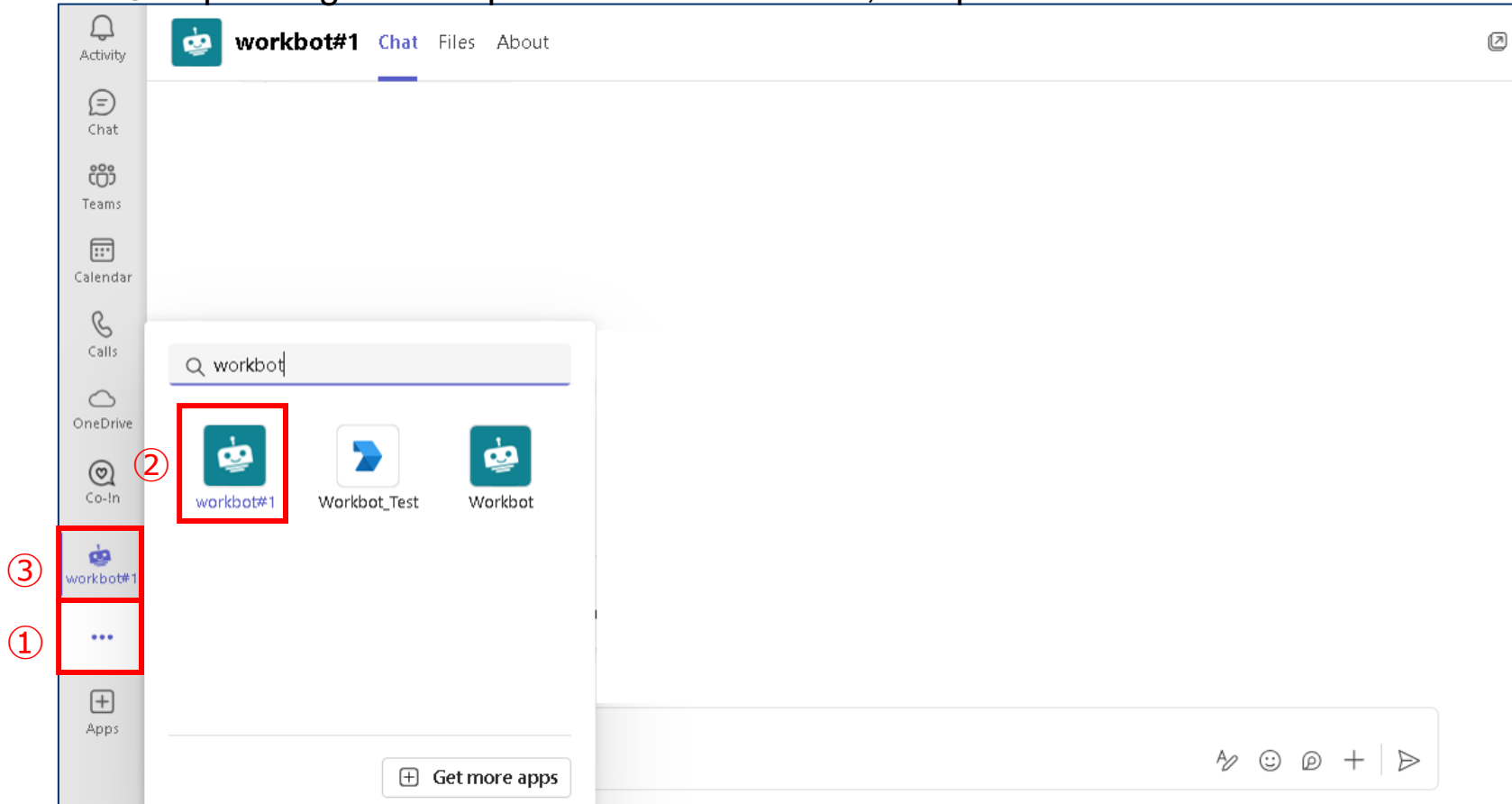
■ ④ Add “workbot#1”
Click the “Add” button.

2. Start the “workbot#1”

2. Start the “workbot#1”

■ Start the “workbot#1”

- ①Click the “...” menu on side of Teams.
- ②Display the added applications and click on “workbot#1”.
 - After installation, you can call “workbot#1” in the above operation.
- ③Depending on the space of the side menu, it is placed on the side menu automatically.



3. Display main menu

3. Display main menu

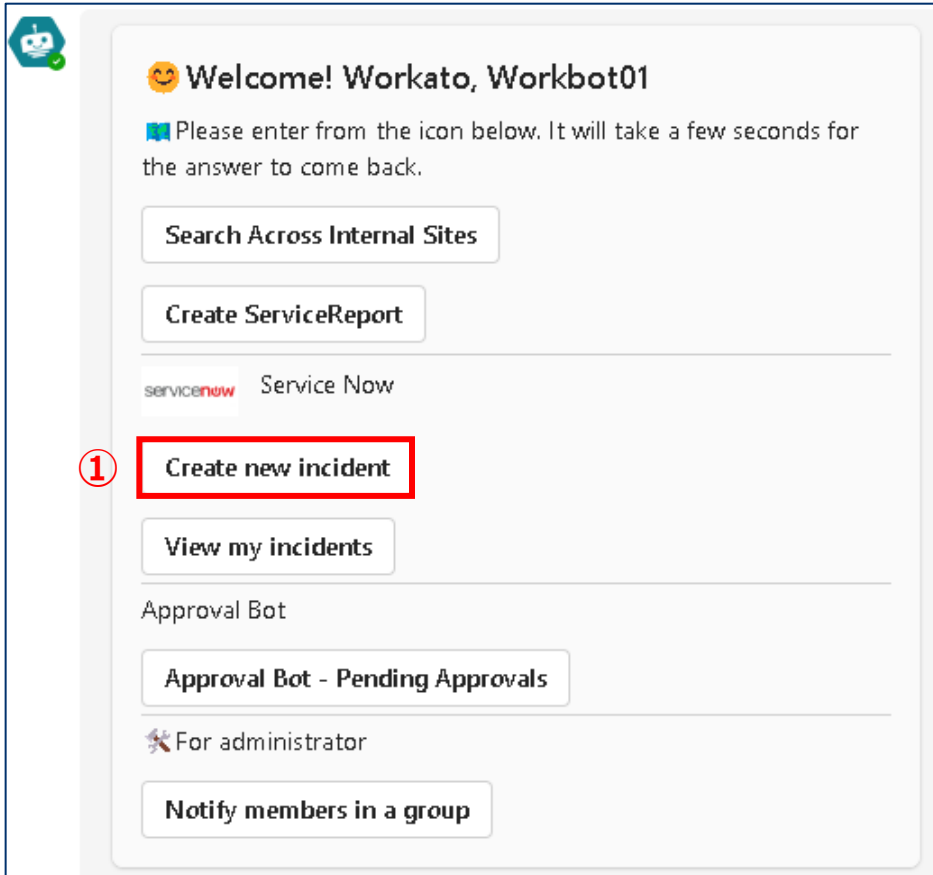
■ Display main menu

- ①Click on the input box in the 'workbot#1' dialog box, as 'help' is automatically displayed, please click on it.
- ②Once you have entered 'help', please press the enter key or click the send button.
- ③The main menu appears.

The image shows a screenshot of the Workato interface. On the left, there is a sidebar with a plus icon and the word 'Apps'. The main area displays a 'Suggestions' box with the text 'help' and 'Type 'help' to view available commands'. Below this, there is an input box containing the text 'help'. To the right of the input box is a row of icons: a pencil, a smiley face, a speech bubble, a plus sign, and a right-pointing arrow. A red box highlights the input box and the right-pointing arrow. A red arrow points from the input box to the right-pointing arrow. On the right side of the interface, there is a 'Welcome! Workato, Workbot01' message with a red circle containing the number 3. Below the message, there is a list of buttons: 'Search Across Internal Sites', 'Create ServiceReport', 'Service Now', 'Create new incident', 'View my incidents', 'Approval Bot', 'Approval Bot - Pending Approvals', 'For administrator', and 'Notify members in a group'.

4. Create incident ticket using “workbot#1”

4. Create incident ticket using “workbot#1”



■ ① Click “Create new incident” button

Click the “Create new incident” button in the main menu.

※Points of Attention

When you first click the “Create new incident” button, “workbot#1” will ask you to connect to ServiceNow.



Connect to ServiceNow

Please log in to your ServiceNow account to proceed with your command.

[Connect | ServiceNow](#)

Please click the “Connect | ServiceNow” hyperlink to connect to your ServiceNow account in browser.

For more information, please refer to “[9-1. Connect to ServiceNow](#)”.

4. Create incident ticket using “workbot#1”

Step 1: Create an Incident - YHQ
Caller: Workbot01 Workato
Location: YHQ
Business Service(Not Necessary): Accounting
Continue

Step 2: Create an Incident - YHQ
Caller: Workbot01 Workato
Location: YHQ
Business Service: Accounting
Category(Necessary): Business Application Services
Continue Back

Step 3: Create an Incident - YHQ
Urgency(Necessary): 3 - Low
Subject(Necessary): [Workato連携テスト]起案システムでPDFファイルの言語を変更する方
Description(Necessary): 起案システム作成のPDFファイルはすべて英語なので、日本語版を作成するにはどうすればいいか？
Translate

Step 4: Create an Incident - YHQ
Subject(Translation): How to change the language of PDF files in the [Workato Co
Description(Translation): All PDF files created by the drafting system are in English, so how can I create a Japanese version?
Shared Emails(Not Necessary):
OK Back

■ ②Choose “Business Service” (Not Necessary)

Choose the business service for the incident ticket.

■ ③Click “Continue” button

Click the “Continue” button to continue creating the incident ticket.

■ ④Choose “Category”

Choose the category for the incident ticket.

■ ⑤Click “Continue” button

Click the “Continue” button to continue creating the incident ticket.

■ ⑥Choose “SubCategory” (Not Necessary)

Choose the sub’s category for the incident ticket.

■ ⑦Click “Continue” button

Click the “Continue” button to continue creating the incident ticket.

■ ⑧Choose “Urgency”

Choose the urgency for the incident ticket.

■ ⑨Enter “Subject”

Enter the subject for the incident ticket.

■ ⑩Enter “Description”

Enter the description for the incident ticket.

■ ⑪Click “Translate” button (Not Necessary)

Click the “Translate” button to translate subject and description into English. (Only can translate the non-English to English.)

■ ⑫Check translated result

Check that the translation of the subject and description meets your requirements.

■ ⑬Enter “Shared Emails” (Not Necessary)

Enter the shared emails for the incident ticket.

■ ⑭Click “OK” button

Click the “OK” button to continue creating the incident ticket.

4. Create incident ticket using “workbot#1”

15

Make sure the Incident information is correct.

Caller
Workbot01 Workato

Location
YHQ

Business Service
Accounting

Category
Business Application Services

SubCategory
YODA_Sales

Urgency
3 - Low

Subject
[Workato連携テスト]起案システムでPDFファイルの言語を変更する方法
[English]

Description
起案システム作成のPDFファイルはすべて英語なので、日本語版を作成するにはどうすればいいか？
[English]

Shared Emails

16

Send

Back

YOKOGAWA

All

Filter

Service Desk

All Users

Submit time sheet

Callers

Incidents

Knowledge

My Work

My Groups Work

My Approvals

Maintain items - YSH

SLAs

My Work

My Groups Work

Activity Subscriptions

Agent Client Collector

Agent Schedule

App Engine

Application Diagnostics Tool

Application Vulnerability Response

Incident - INC0690707

INC0690707

Discuss Follow Update Save Resolve Delete

Note: IT admin working on this incident have to fill the Time Worked (hh:mm) field with the duration spent in analyzing, troubleshooting or follow up with end user

New In Progress On Hold Resolved Closed Canceled

Number INC0690707

Incident state New

* Caller Workbot01 Workato

Impact 3 - Low

Location YHQ

Urgency 3 - Low

City

Priority 5 - Planning

Business service Accounting

Channel Teams

Reassign by User

Assignment group YODA L1.5 Support

Category Business Application Services-Y

Auto Assignment group

Subcategory --None--

Assigned to

Configuration Item

Opened by Workbot01 Workato

Down Time (In minutes)

* Content Type -- None --

Internal/External Sign

Due date

Templates: Incident_resolution_template Incident_topic_completion_template Incident_unresolved_task_template

Incident [INC0690707] has been opened

Subject
[Workato連携テスト]起案システムでPDFファイルの言語を変更する方法
[English]
How to change the language of PDF files in the [Workato Cooperation Test] drafting system

Number
INC0690707

Caller
Workbot01 Workato

Business Service
Accounting

Category
Business Application Services

SubCategory
YODA_Sales

Description
起案システム作成のPDFファイルはすべて英語なので、日本語版を作成するにはどうすればいいか？
[English]
All PDF files created by the drafting system are in English, so how can I create a Japanese version?

Urgency
3 - Low

Created By Workbot01 Workato

Created Date 2024/07/19 14:11:30

Opened By Workbot01 Workato

Opened Date 2024/07/19 14:11:30

Updated by Dong Chi

Updated Date 2024/07/19 14:11:32

17

Send Additional Message

■ 15 Check incident ticket

Make sure the incident information is correct.

■ 16 Click “Send” button

As soon as you click the “send” button, the incident ticket is created in ServiceNow. At the same time, a notification that an incident has been opened is displayed on Teams, as shown in the image on the right.
(The center figure above is the screen of the helpdesk, so the requester cannot see it.)

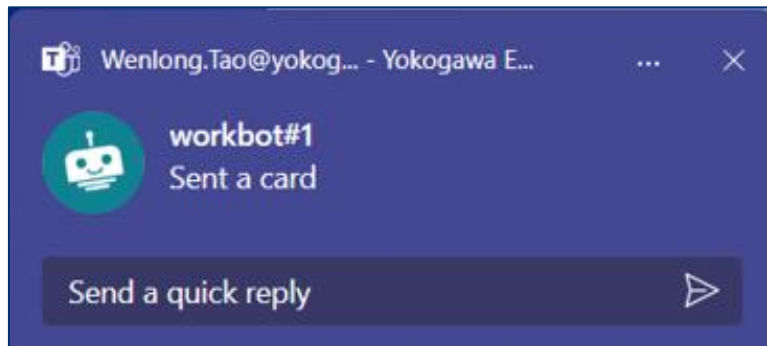
■ 17 Send Additional Message (Not Necessary)

If you want to send comments or add attachments to incident ticket, click the “Send Additional Message” button, then will open the incident detail information.

5. Receive the incident's notification

5. Receive the incident's notification

- “workbot#1” will proactively send you a notification message when one of the following three scenarios occurs.
 - Scenario1: When the helpdesk member send comments to the incident ticket.
 - Scenario2: When the helpdesk change the ticket status to “resolved”.
 - Scenario3: When the helpdesk change the ticket status to “closed”.
- Delivered on Teams as shown below.
 - Teams will pop up, please click it.



※Points of Attention

- Only the incident tickets created via Teams.
- Please note that the incident tickets created by email, phone or web pages will not be displayed in the messages and inbox on the Teams.

5. Receive the incident's notification

- Scenario1: When the helpdesk member send comments to the incident ticket, the incident's caller will receive the incident updated message as below.

workbot#1 9:09

Incident [INC0816666]'s comments has been updated

起案システム連作成のPDFファイルはすべて英語なので、日本語版を作成するにはどうすればいいか？
[English]
All PDF files created by Kikan Sistemren are in English, so how can I create a Japanese version?

Number
INC0816666

State
In Progress

Updated by
Workbot01 Workato

Updated Date
2024-05-22 09:08:52

① Details

[\[INC0816666\]Incident Detail Information](#)

Subject
[Workato連携テスト]起案システムでPDFファイルの言語を変更する方法
[English]How to change the language of PDF files in the [Workato Cooperation Test] drafting system

Number
INC0816666

Caller
Wenlong Tao

Business Service
Accounting

Category
Business Application Services

SubCategory
--None--

Urgency
3

State
On Hold

Description
起案システム連作成のPDFファイルはすべて英語なので、日本語版を作成するにはどうすればいいか？
[English]
All PDF files created by Kikan Sistemren are in English, so how can I create a Japanese version?

Created By Wenlong Tao
Created Date 2024/05/21 17:12:08
Opened By Wenlong Tao
Opened Date 2024/05/21 17:12:08

Updated by Workbot01 Workato
Updated Date 2024/05/22 09:10:17

2024-05-22 09:08:52 – Workbot01 Workato Additional Comment
技術チームと話し合い、早急に分析結果をご返信いたします。
[English]
We will discuss the issue with the technical team and revert to you with the analysis ASAP.

2024-05-22 09:09:51 – Workbot01 Workato Additional Comment
問題を詳しく説明してください。
[English]
Please describe the problem in detail.

2024-05-22 09:10:17 – Workbot01 Workato Additional Comment
発信者からの応答待ち
[English]
Awaiting Caller Replies

Please enter your message here...

Translate

Translation

Add attachments
SharePoint/Teams Local File/OneDrive

Send ⑤

②

③

④

- ①Click the “Details” button in the incident updated message, then will open the incident detail information.
- ②You can confirm the answers of the helpdesk.
- ③Enter a reply message(not necessary) and click "Translate" button to automatically translate the message into English.
- ④If you want to add an attachment, please refer to "[6. Add attachment to incident](#)" to attach files.
- ⑤Click the "Send" button which will add comment and attached file to incident.

5. Receive the incident's notification

- Scenario2: When the helpdesk change the ticket status to “resolved”, the incident caller will receive the incident resolved message as below.


The screenshot shows a Teams chat window with a message from 'workbot#1' at 15:05. The message states that incident [INC0816666] has been resolved and provides instructions for creating a Japanese version of PDF files. A red box highlights the 'Details' button in the message, with a red arrow pointing to the 'Incident Detail Information' panel. This panel shows the incident's subject, number (INC0816666), caller (Wenlong Tao), business service (Accounting), category (Business Application Services), subcategory (None), urgency (3), and state. A second red box highlights the 'Send' button in the 'Add attachments' section of the incident details panel, with a red arrow pointing to the 'Send' button in the chat window. A third red box highlights the 'Survey Link' in the chat message, with a red arrow pointing to a survey window. The survey window is titled 'YHQ Survey' and asks 'Are you satisfied with contents of the answer?' with radio button options: Very Good, Good, Normal, Bad, and Very Bad. The survey window also has 'Submit', 'Save', and 'Cancel' buttons.

- ①Click the “Details” button in the incident resolved message, then will open the incident detail information.
- ②Do the same operation as the incident detail in scenario 1 and click “Send” button. (When you click the “Send” button, the comment and the attached file will be sent together.)
- ③Click on the “Survey Link” hyperlink in the resolved message will open the survey of the incident ticket in your browser.

5. Receive the incident's notification

- Scenario3: When the helpdesk change the ticket status to “closed”, the incident caller will receive the incident closed message as below.

workbot#1 15:27

 Incident [INC0816666] has been closed

起案システム連作成のPDFファイルはすべて英語なので、日本語版を作成するにはどうすればいいか？
[English]
All PDF files created by Kikan Sistemren are in English, so how can I create a Japanese version?

Number
INC0816666

State
Closed

Updated by
Workbot01 Workato

Updated Date
2024-05-22 15:26:56

① [Details](#)

[\[INC0816666\] Incident Detail Information](#)

Subject
[Workato連携テスト]起案システムでPDFファイルの言語を変更する方法
[English]How to change the language of PDF files in the [Workato Cooperation Test] drafting system

Number
INC0816666

Caller
Wenlong Tao

Business Service
Accounting

Category
Business Application Services

SubCategory
--None--

Urgency
3

State
Closed

Description
起案システム連作成のPDFファイルはすべて英語なので、日本語版を作成するにはどうすればいいか？
[English]
All PDF files created by Kikan Sistemren are in English, so how can I create a Japanese version?

Created By Wenlong Tao
Created Date 2024/05/21 17:12:08
Opened By Wenlong Tao
Opened Date 2024/05/21 17:12:08
Updated by Workbot01 Workato
Updated Date 2024/05/22 15:26:56

2024-05-22 09:08:52 – Workbot01 Workato Additional Comment
技術チームと話し合い、早急に分析結果をご返信いたします。
[English]
We will discuss the issue with the technical team and revert to you with the analysis ASAP.

2024-05-22 09:09:51 – Workbot01 Workato Additional Comment
問題を詳しく説明してください。
[English]
Please describe the problem in detail.

2024-05-22 09:10:17 – Workbot01 Workato Additional Comment
発信者からの応答待ち
[English]
Awaiting Caller Replies

2024-05-22 10:31:26 – Wenlong Tao Additional Comment
私のチームは、起案システムから承認待ちの起案通知を受け取りました。しかし、起案PDFはすべて英語です。日本語のPDFを受け取りたいのですが、どのように設定すればよいでしょうか？
For answers in English, please see below.
My Teams has received a notification from the proposal system that is awaiting approval. However, the proposal PDFs are all in English. How do I set up the system to receive PDFs in Japanese?

2024-05-22 12:41:20 – Wenlong Tao Attachment
[OneDriveFile.pdf](#)

2024-05-22 13:41:09 – Wenlong Tao Attachment
[SharePointFile.pdf](#)

2024-05-22 14:03:45 – Wenlong Tao Attachment
[SNOW groups.xlsx](#)

2024-05-22 15:05:18 – Workbot01 Workato Additional Comment
事件解決
[English]
Incident Resolved

- ① **Open the incident detail information**
Click the “Details” button in the incident closed message, then will open the incident detail information.

6. Add attachment to incident

6-1. Add SharePoint file to incident

6-2. Add Teams channel file to incident

6-3. Add Local file to incident

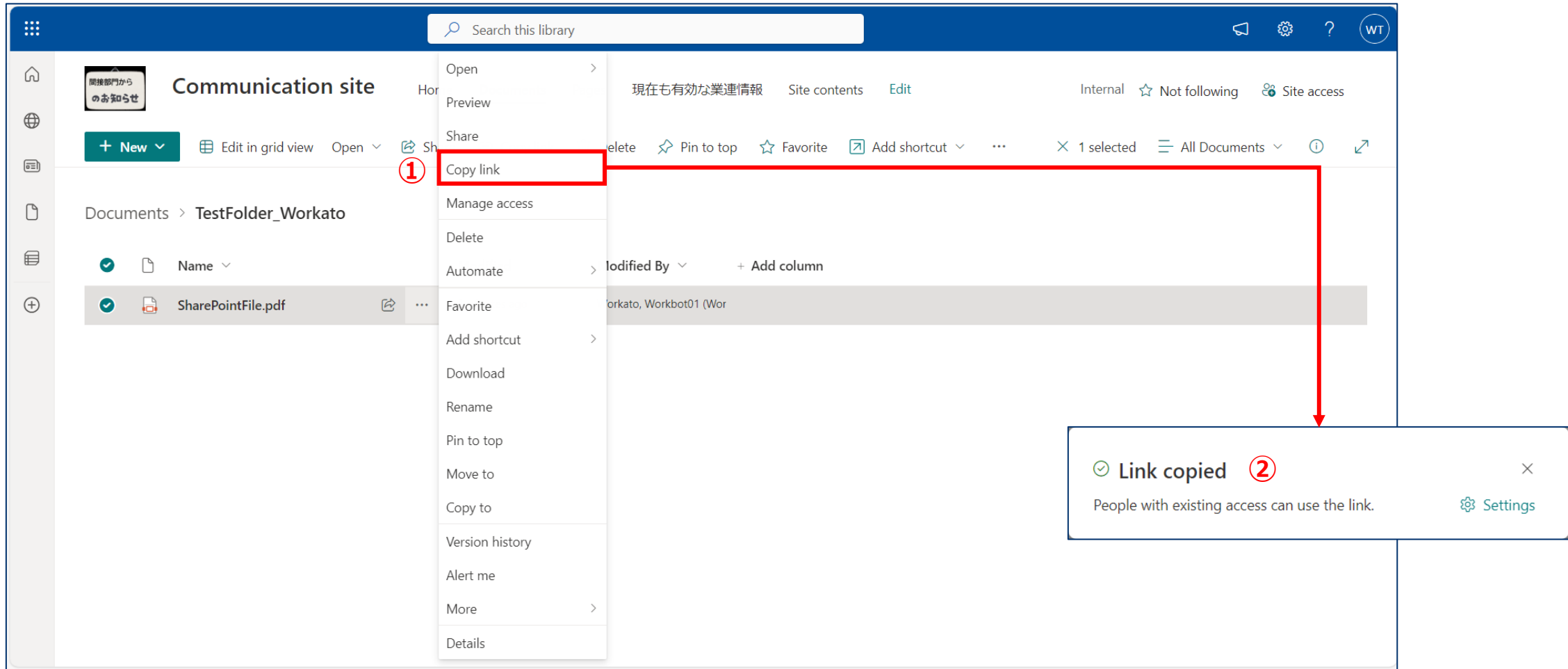
6-4. Add OneDrive file to incident

6-5. Add files to incident by ServiceNow chat site

6-1. Add SharePoint file to incident

6-1. Add SharePoint file to incident

- ① In the SharePoint site, right-click the file you want to send and click the “Copy link” menu.
- ② The “Link copied” dialog box appears.



6-1. Add SharePoint file to incident

Please enter your message here...

Translate

Translation

Add attachments

③ SharePoint/Teams Local File/OneDrive

Please enter the URL of the attachment here...

④ https://ykgwoffice.sharepoint.com/ib:/r/sites/Kasetsu_Gyoumu/

(Only the file in SharePoint or file shared in Teams channel are supported. When you click "Send" button, the file entered here will overwrite the "Local File/OneDrive" file.)

⑤ Send

2024-08-08 11:27:33 — Workbot01 Workato Attachment ⑥
SharePointFile.pdf

Please enter your message here...

Translate

Translation

Add attachments

SharePoint/Teams Local File/OneDrive

Please enter the URL of the attachment here...

(Only the file in SharePoint or file shared in Teams channel are supported. When you click "Send" button, the file entered here will overwrite the "Local File/OneDrive" file.)

Send

※Prerequisites

To add attachment to the incident, you need to open the incident detail information first.

■ ③Click “SharePoint/Teams” button

Click the “SharePoint/Teams” button, then you can see the URL text input box.

■ ④Enter file link

Paste the link you just copied into the URL input box.

■ ⑤Click the “Send” button

Click the “Send” button which will add comment and attached file to incident.

Points of Attention

- When you click the "Send" button, the comment and the attached file will be sent together.
- If there is an unsent file of “Local File/OneDrive” and the URL in the input inbox is the correct file path, click “Send” button which the file in the input box will overwrite the unsent file of “Local File/OneDrive”.

■ ⑥Confirm added attachment file

The file is added to the incident.

6-2. Add Teams channel file to incident

6-2. Add Teams channel file to incident

The screenshot shows the Microsoft Teams interface. On the left sidebar, the 'Teams' icon is circled with a red box and labeled ①. Below it, the channel 'ZTOG-Workbot_SNOW_YHQ' is circled with a red box and labeled ②. At the top of the channel, the 'Files' tab is circled with a red box and labeled ③. In the 'Documents' list, the file 'SNOW groups.xlsx' is selected, and its context menu is open. The 'Copy link' option is circled with a red box and labeled ④. A red arrow points from the 'Copy link' option to a 'Link created' notification at the bottom right. In this notification, the 'Copy' button is circled with a red box and labeled ⑤.

■ ① Click Teams

Click on “Teams” menu on side of Teams.

■ ② Click Channel

Click on a channel in the list to go to the group channel.

■ ③ Open files list

Click on “Files” at the top of the channel to enter the files list of the channel.

■ ④ Click “Copy link” button

Find the necessary file and click on the “Copy Link” button.

■ ⑤ Click “Copy” button

Click the “Copy” button to copy the file’s link.

6-2. Add Teams channel file to incident

The first screenshot shows the 'Add attachments' section with 'SharePoint/Teams' selected and a URL entered. The second screenshot shows the 'Send' button being clicked.

2024-08-08 12:38:24 — Workbot01 Workato Attachment ⑨
SNOW groups.xlsx

Please enter your message here...

Translate

Translation

⑥ Add attachments

⑥ SharePoint/Teams Local File/OneDrive

Please enter the URL of the attachment here...

⑦ https://ykgwoffice.sharepoint.com/:x/r/sites/ZTOG-Workbot_S\

(Only the file in SharePoint or file shared in Teams channel are supported. When you click "Send" button, the file entered here will overwrite the "Local File/OneDrive" file.)

⑧ Send

⑨

Please enter your message here...

Translate

Translation

⑥ Add attachments

SharePoint/Teams Local File/OneDrive

Please enter the URL of the attachment here...

(Only the file in SharePoint or file shared in Teams channel are supported. When you click "Send" button, the file entered here will overwrite the "Local File/OneDrive" file.)

Send

✖Prerequisites

To add attachment to the incident, you need to open the incident detail information first.

■ ⑥Click “SharePoint/Teams” button

Click the “SharePoint/Teams” button, then you can see the URL text input box.

■ ⑦Enter file link

Paste the link you just copied into the URL input box.

■ ⑧Click the “Send” button

Click the “Send” button which will add comment and attached file to incident.

Points of Attention

- When you click the "Send" button, the comment and the attached file will be sent together.
- If there is an unsent file of “Local File/OneDrive” and the URL in the input inbox is the correct file path, click “Send” button which the file in the input box will overwrite the unsent file of “Local File/OneDrive”.

■ ⑨Confirm added attachment file

The file is added to the incident.

6-3. Add Local file to incident

6-3. Add Local file to incident

※Prerequisites

To add attachment to the incident, you need to open the incident detail information first.

- ① Click the “Local File/OneDrive” button on the incident detail screen.
- ② “workbot#1” will return the “Please upload File” message.
- ③ Click the “+” button in the lower right corner.
- ④ Click the “Attach file” button.
- ⑤ Click “Upload from this device” and select the local file.
- ⑥ The local file will appear in the input box.
- ⑦ Please press the enter key or click the send button to add the file to “workbot#1”.

The screenshot illustrates the process of adding a local file to an incident in ServiceNow. The interface is divided into several sections:

- Message Input Area:** At the top, there is a text input field labeled "Please enter your message here...". Below it is a "Translate" button and a "Translation" section.
- Add Attachments:** A section with a search bar and buttons for "SharePoint/Teams" and "Local File/OneDrive". The "Local File/OneDrive" button is highlighted with a red box and a circled 1.
- Send Button:** A "Send" button is located below the attachment options.
- Please Upload File:** A section with a red border and a circled 2, containing the text "Please upload File" and instructions: "Click on the paperclip icon (below where you type your message) and select the file to upload."
- Actions and Apps Menu:** A dropdown menu is open, showing various actions. The "Attach file" option is highlighted with a red box and a circled 4.
- File List:** A list of files is shown, including "Workbot01OneDrive.xlsx", "SR_template.xlsx", "SNOW groups.xlsx", "SharePointFile.pdf", and "SR_template.xlsx". The "Upload from this device" option is highlighted with a red box and a circled 5.
- Message Input Box:** At the bottom, there is a text input field labeled "Type a message". The "SR_template.xlsx" file is shown as an attachment in the input box, highlighted with a red box and a circled 6.
- Send Button:** A red box with a circled 7 highlights the send button (a paperclip icon) in the bottom right corner of the message input area.

7-3. Add Local file to incident

Please enter your message here...

Translate

Translation

Add attachments

SharePoint/Teams Local File/OneDrive

Unsent – Workbot01 Workato Attachment ⑧

SR_template.xlsx

Send ⑨

2024-08-08 11:10:21 – Workbot01 Workato Attachment ⑩

SR_template.xlsx

Please enter your message here...

Translate

Translation

Add attachments

SharePoint/Teams Local File/OneDrive

Send

※Prerequisites

To add attachment to the incident, you need to open the incident detail information first.

■ ⑧ Confirm unsent file

The name of the added file can be seen on the incident detail screen.

At this time, the file is not sent to the incident, and adding the file again will replace the added file.

■ ⑨ Click the “Send” button

Click the “Send” button which will add comment and attached file to incident.

(When you click the "Send" button, the comment and the attached file will be sent together.)

■ ⑩ Confirm added attachment file

The file is added to the incident.

※Points of Attention

- You can only add one file at a time, if you need to add more than one file, add it multiple times and send it.

6-4. Add OneDrive file to incident

6-4. Add OneDrive file to incident

※Prerequisites

To add attachment to the incident, you need to open the incident detail information first.

- ① Click the “Local File/OneDrive” button on the incident detail screen.
- ② “workbot#1” will return the “Please upload File” message.
- ③ Click the “+” button in the lower right corner.
- ④ Click the “Attach file” button.
- ⑤ Click “Attach cloud files” and select the OneDrive file.
- ⑥ The OneDrive file will appear in the input box.
- ⑦ Please press the enter key or click the send button to add the file to “workbot#1”.

The screenshot illustrates the process of adding a OneDrive file to an incident chat. The interface is divided into several sections:

- Message Input Area:** At the top, there is a text input field with the placeholder "Please enter your message here...". Below it is a "Translate" button and a "Translation" section.
- Add Attachments:** A section with the heading "Add attachments" containing two buttons: "SharePoint/Teams" and "Local File/OneDrive". The "Local File/OneDrive" button is highlighted with a red box and a circled 1.
- Send Button:** A "Send" button is located below the attachment buttons.
- Please Upload File:** A red box highlights a message from "workbot#1" that says "Please upload File" and includes instructions: "Click on the paperclip icon (below where you type your message) and select the file to upload." This is marked with a circled 2.
- Actions and Apps Menu:** A search bar "Search for actions and apps" is shown. Below it, a list of actions includes "Attach file" (highlighted with a red box and a circled 4), "Schedule message", "Set delivery options", "Record video clip", "Schedule meeting", "Stream", "Praise", "Approvals", and "Viva Learning".
- Cloud Files Selection:** A list of files is shown, including "Workbot01OneDrive.xlsx", "SR_template.xlsx", "SNOW groups.xlsx", "SharePointFile.pdf", and "SR_template.xlsx". The "Attach cloud files" button is highlighted with a red box and a circled 5.
- File Selection:** The "Workbot01OneDrive.xlsx" file is selected and appears in the input box, highlighted with a red box and a circled 6.
- Send Button:** A red box highlights the send button (a right-pointing arrow) in the bottom right corner of the chat input area, marked with a circled 7.

6-4. Add OneDrive file to incident

Please enter your message here...

Translate

Translation

Add attachments

SharePoint/Teams Local File/OneDrive

Unsent – Workbot01 Workato Attachment ⑧

Workbot01OneDrive.xlsx

Send ⑨

2024-08-09 10:46:43 – Workbot01 Workato Attachment ⑩

Workbot01OneDrive.xlsx

Please enter your message here...

Translate

Translation

Add attachments

SharePoint/Teams Local File/OneDrive

Send

※Prerequisites

To add attachment to the incident, you need to open the incident detail information first.

■ ⑧ Confirm unsent file

The name of the added file can be seen on the incident detail screen.

At this time, the file is not sent to the incident, and adding the file again will replace the added file.

■ ⑨ Click the “Send” button

Click the “Send” button which will add comment and attached file to incident.

(When you click the "Send" button, the comment and the attached file will be sent together.)

■ ⑩ Confirm added attachment file

The file is added to the incident.

※Points of Attention

- You can only add one file at a time, if you need to add more than one file, add it multiple times and send it.

6-5. Add files to incident by ServiceNow chat site

6-5. Add files to incident by ServiceNow chat site

①

[\[INC0816666\] Incident Detail Information](#)

Subject

[Workato連携テスト]起案システムでPDFファイルの言語を変更する方法
[English]How to change the language of PDF files in the [Workato Cooperation Test] drafting system

Number

INC0816666

Caller

Wenlong Tao

Business Service

Accounting

Category

Business Application Services

SubCategory

--None--

Urgency

3

State

On Hold

Description

起案システム連作成のPDFファイルはすべて英語なので、日本語版を作成するにはどうすればいいか？

[English]

All PDF files created by Kikan Sistemren are in English, so how can I create a Japanese version?

Created By Wenlong Tao

Created Date 2024/05/21 17:12:08

Opened By Wenlong Tao

Opened Date 2024/05/21 17:12:08

■ Access ServiceNow chat site

- ① When you would like to access the ServiceNow chat site, you can click the title of the incident detail information.
- ② You can drag and drop files and screen shot files, etc. into “Attachments” to the helpdesk to the incident ticket.

YOKOGAWA

Global IT Service Management

Home

Knowledge

Service Catalog

Ticket History

WT Wenlong Tao

Home

Ticket Form

Search

Q

[Workato連携テスト]起案システムでPDFファイルの言語を変更する方法[English]How to change the language of PDF files in the [Workato Cooperation Test] drafting system

Type your message here...

Send

Workbot01 Workato

2024-05-22 06:40:17

Additional comments

Awaiting Caller Replies

WW

Workbot01 Workato

2024-05-22 06:39:51

Additional comments

Please describe the problem in detail.

WW

Workbot01 Workato

2024-05-22 06:38:52

Additional comments

We will discuss the issue with the technical team and revert to you with the analysis ASAP.

WW

Wenlong Tao

2024-05-21 14:42:08

INC0816666 Created

WT

Agent working on this Incident:
Workbot01 Workato

Number

INC0816666

Assigned to

Workbot01 Workato

State

On Hold

Priority

5 - Planning

Created

2024-05-21 14:42:08

Updated

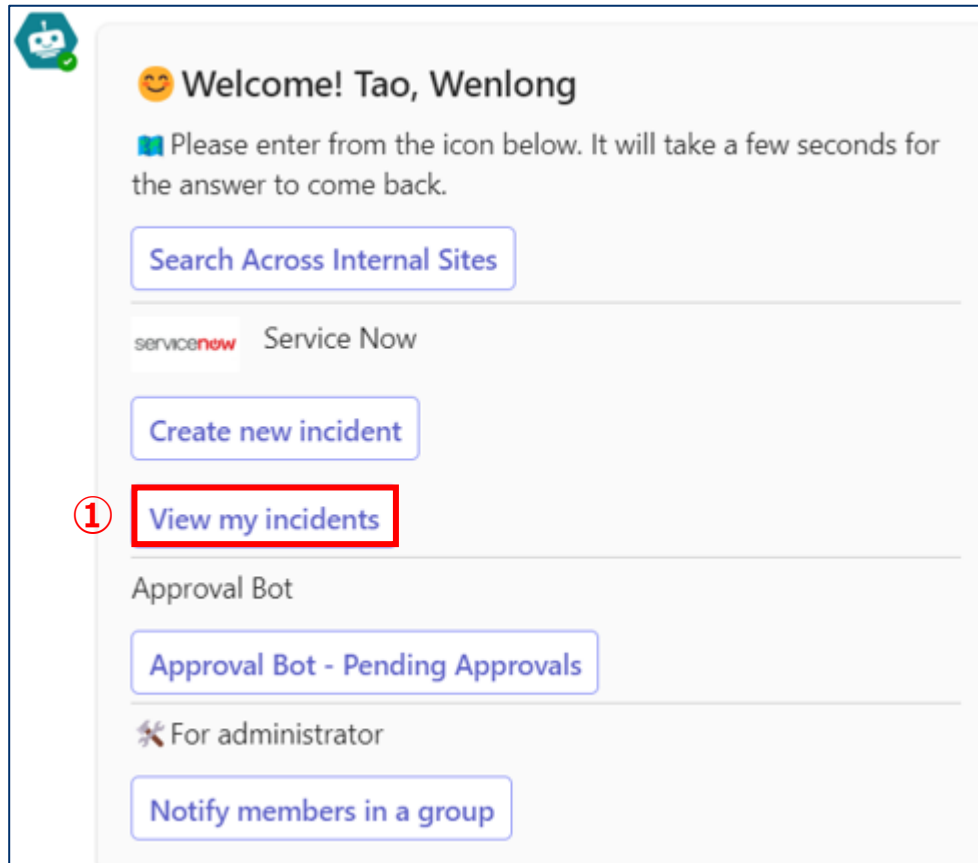
2024-05-22 06:40:17

Attachments

Drop files here

7. View your incident tickets

7. View your incident tickets



■ ①Click “View my incidents” button

Click the “View my incidents” button in the main menu, then you can see the below “Total number of incidents” message.

Total number of incidents: 51


User Name Workbot01 Workato
Email Address Workbot01.Workato@yokogawa.com

State	Incidents	Details
New	22	Details
In Progress	13	Details
On Hold	1	Details
Resolved	0	Details
Closed	13	Details
Canceled	2	Details

※Points of Attention

- Please note that when you click the “View my incidents” button, all incident tickets you have created via Teams, email, phone, or web page will be displayed in the inbox on the Teams.

7. View your incident tickets



Total number of incidents: 51

User Name Workbot01 Workato
Email Address Workbot01.Workato@yokogawa.com

State	Incidents	Details
New	22	<div>Details</div>
In Progress	13	<div>②Details</div>
On Hold	1	<div>Details</div>
Resolved	0	<div>Details</div>
Closed	13	<div>Details</div>
Canceled	2	<div>Details</div>

[INC0690666] Incident Information ③

Number

INC0690666

Category

Infrastructure Services

[INC0690665] Incident Information

Number

INC0690665

Category

Business Application Services

5 / 13

Next 5

④

■ ②Click “Details” button

Click on the “Details” button of a state to open this state’s incidents that sent via Teams.

■ ③Displayed incident information

Sort by the oldest creation time of the incident tickets and display the top 5 incident tickets.

■ ④Display remaining incident tickets

If the total number of incidents in each state is greater than the number of the already displayed incident, there is the “Next 5” button in the statistical message after the incident list.

Click the “Next 5” button in the statistics message to see the remaining incident tickets.

8. Change “workbot#1” display language


8.Change “workbot#1” display language

There are two types messages from “workbot#1” :

- 1. The user does something in “workbot#1” then “workbot#1” returns messages.

- 2. “workbot#1” notify to user when the incident has been replied by helpdesk member or the incident's state has changed.

workbot#1 14:34

 Total number of incidents: 4

User Name Wenlong Tao
Email Address Wenlong.Tao@yokogawa.com

State	Incidents	Details
New	0	Details
In Progress	1	Details
On Hold	0	Details
Resolved	0	Details
Closed	3	Details
Canceled	0	Details

[\[INC0816666\] Incident Information](#)

Subject

[Workato連携テスト]起案システムでPDFファイルの言語を変更する方法 [English]How to change the language of PDF files in the [Workato Cooperation Test] drafting system

Number

INC0816666

Business Service

Accounting


Category

Business Application Services

SubCategory

--None--

workbot#1 9:09

 Incident [INC0816666]'s comments has been updated

起案システム連作成のPDFファイルはすべて英語なので、日本語版を作成するにはどうすればいいか？
[English]
All PDF files created by Kikan Sistemren are in English, so how can I create a Japanese version?

Number

INC0816666

State

In Progress

Updated by

Workbot01 Workato

Updated Date

2024-05-22 09:08:52

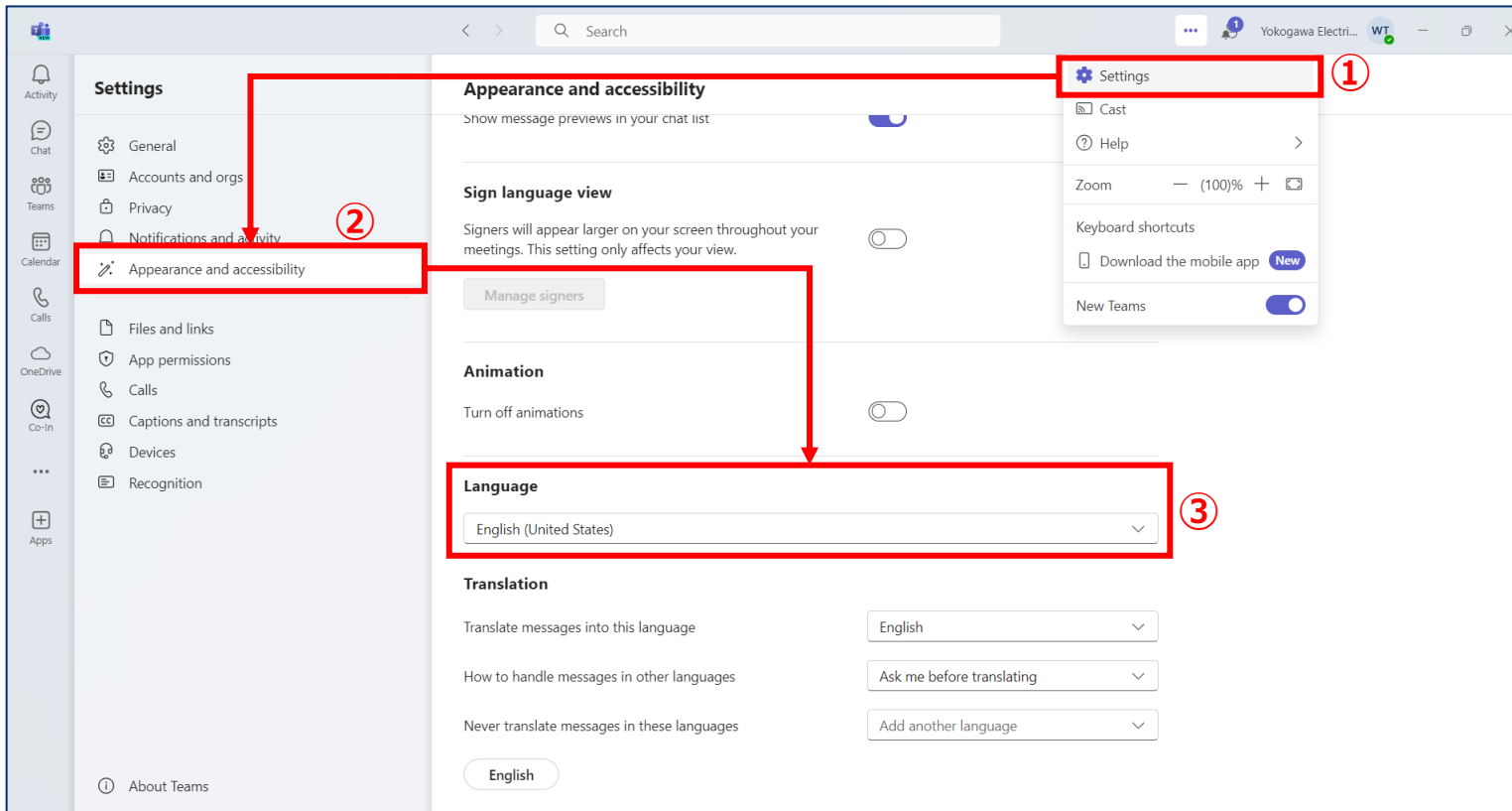
[Details](#)

Wenlong.Tao@yokog... - Yokogawa E...
workbot#1
Sent a card
Send a quick reply

8. Change “workbot#1” display language - 1

- **Type1: The user does something in “workbot#1” then “workbot#1” returns messages.**

The display language of this type messages is related to the Teams display language.



If you want to change the team display language, follow the steps below:

- **① Open the Teams Settings**

Click the “Settings” button of Teams. Then will open the Teams settings screen.

- **② Click “Appearance and accessibility”**

Click “Appearance and accessibility” on the “Settings” menu.

- **③ Select the language**

Select the language from the “Language” drop-down list. Then the Teams display language will change to the selected language.

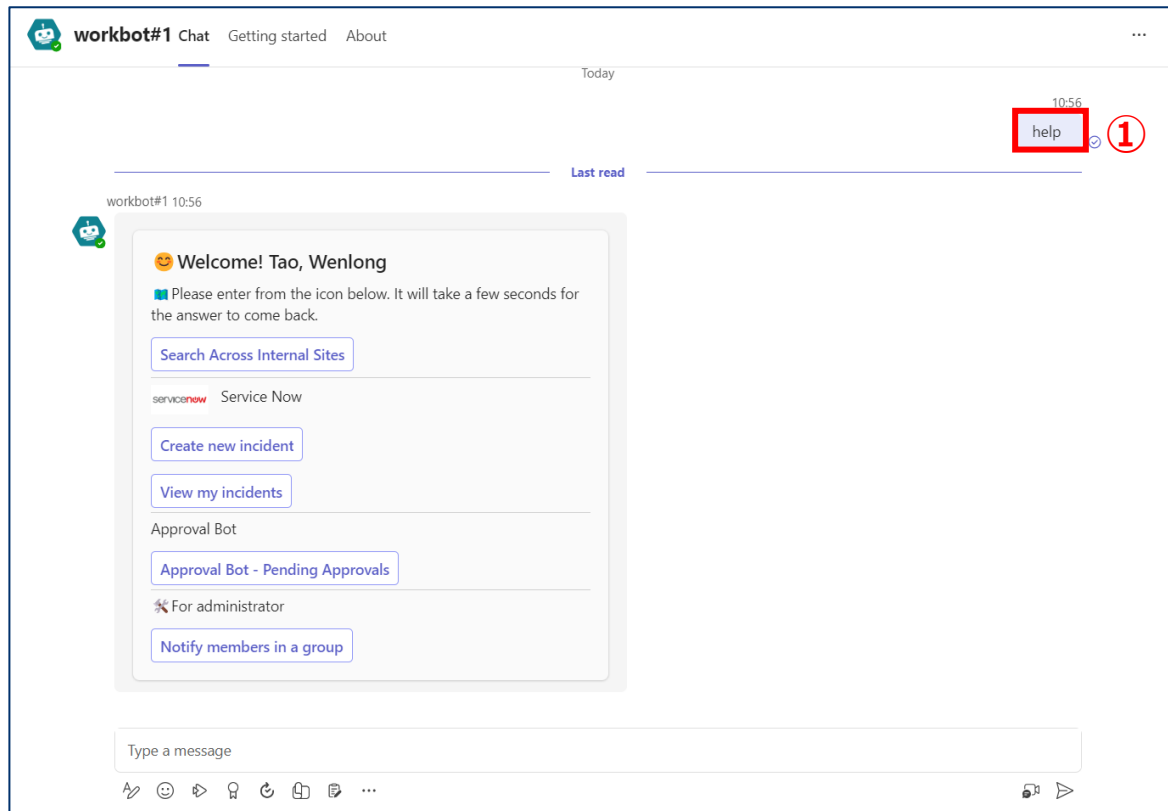
※Points of Attention

- If the display language of Teams is Japanese, the message of "workbot#1" is Japanese.
- If the display language of Teams is not Japanese, the message of “workbot#1” is English.

8. Change “workbot#1” display language - 2

- **Type2: "workbot#1" notify to user when the incident has been replies by helpdesk member or the incident's state has changed.**

The display language of this type messages is only related to the Teams display language when the user sent the “help” command at last time.



■ ①Send “help” command

In the “workbot#1” chat, send the “help” command.

At this point, “workbot#1” will record your Teams display language. When “workbot#1” send you a notification, it will notify the user with this language.

※Points of Attention

- If the display language of Teams is Japanese, the message of “workbot#1” is Japanese.
- If the display language of Teams is not Japanese, the message of “workbot#1” is English.

9. Connect to personal account

9. Connect to personal account

9-1. Connect to ServiceNow

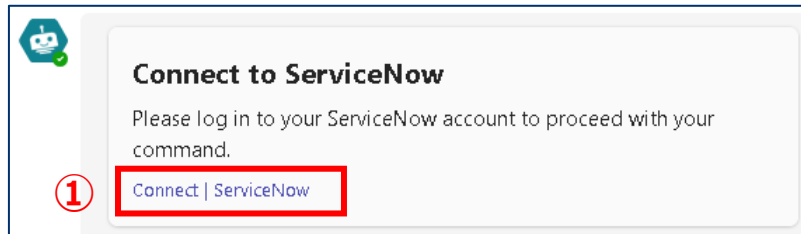
9-2. Connect to Microsoft SharePoint

9-3. Manage personal account connections

9-1. Connect to ServiceNow

9-1. Connect to ServiceNow

- If your ServiceNow account is not connected, you will see the “Connect to ServiceNow” message.



A screenshot of the ServiceNow login page. It has fields for "User name" (containing "30055453" and marked with a circled number 2), "Password" (masked with dots), and "Language" (set to "English"). A blue "login" button is at the bottom.

- ① Click “Connect | ServiceNow”

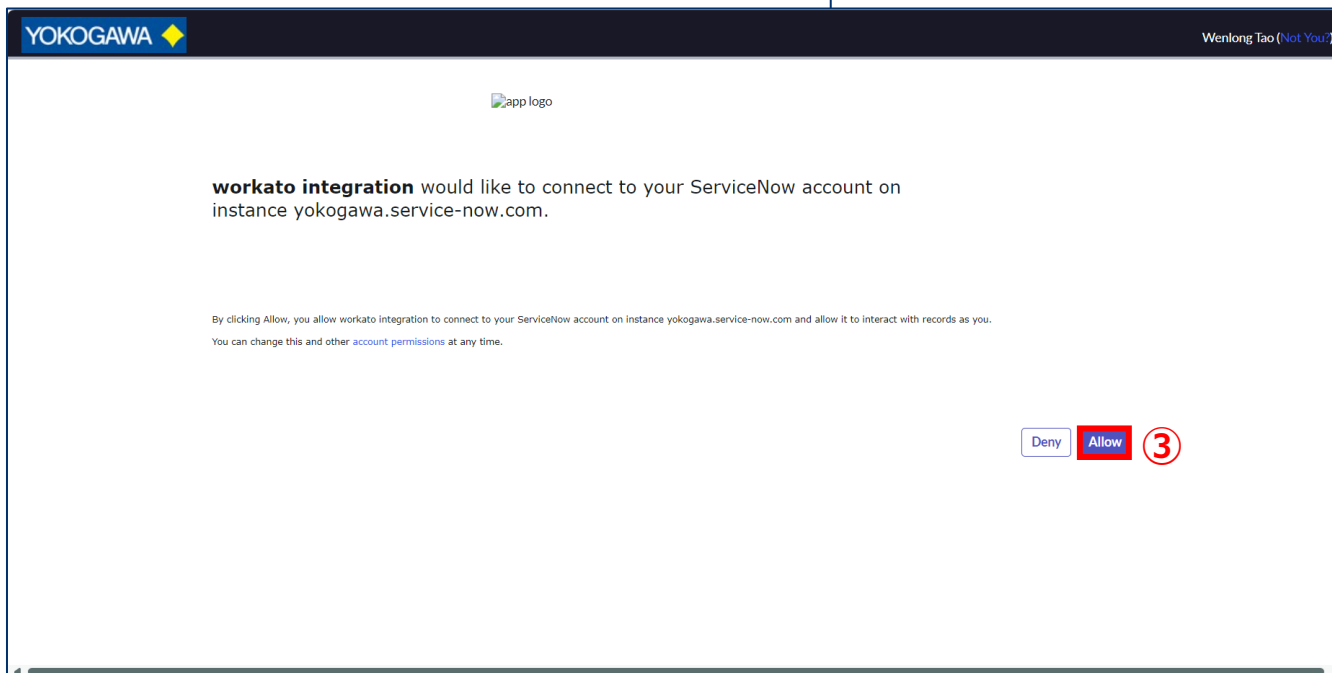
Click the “Connect | ServiceNow” hyperlink, then will open the “login page” in your browser.

- ② Login your account

Enter your ServiceNow account on the “login page” and click the “login” button. (Sometimes it also skips the “login page” and goes directly to the “allow page”.)

- ③ Allow the connection

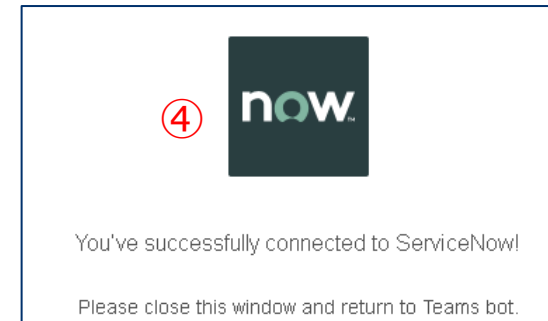
Click the “Allow” button, then will connect to your ServiceNow account.



You can confirm the login account in the upper right corner of the “allow page”, and you can click on the “Not You?” hyperlink to return to the “login page”.

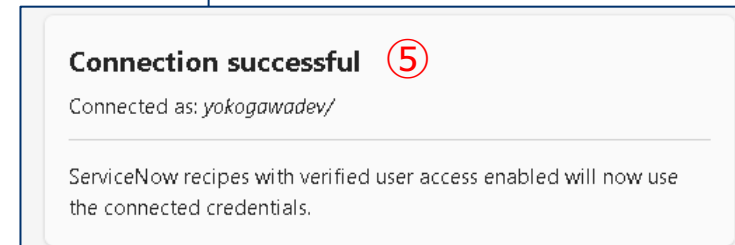
- ④ Confirm success message on browser

If you allow it, the browser will display “You've successfully connected to ServiceNow!” message.



- ⑤ Confirm success message in Teams

You receive the “Connection successful” message in Teams.



9-2. Connect to Microsoft SharePoint

9-2. Connect to Microsoft SharePoint

■ If your SharePoint account is not connected, you will see the “Connect to Microsoft Sharepoint” message.

■ **①Click “Connect | Microsoft Sharepoint”**

Click the “Connect | Microsoft Sharepoint” hyperlink, then will open the “Sign in page” in your browser.

■ **②Login your account**

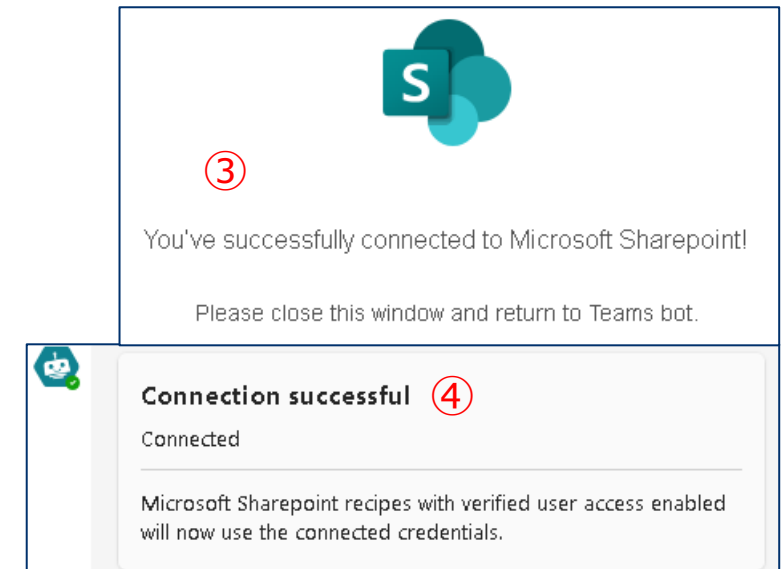
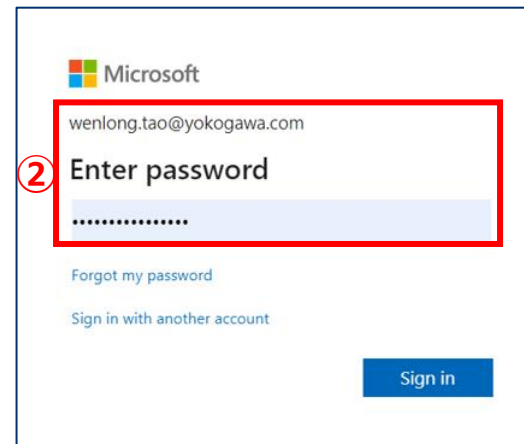
In the “Sign in page”, enter your account and click the “Sign in” button, then will connect to your SharePoint account.

■ **③Confirm success message on browser**

When verification is completed, the browser will display “You've successfully connected to Sharepoint!” message.

■ **④Confirm success message in Teams**

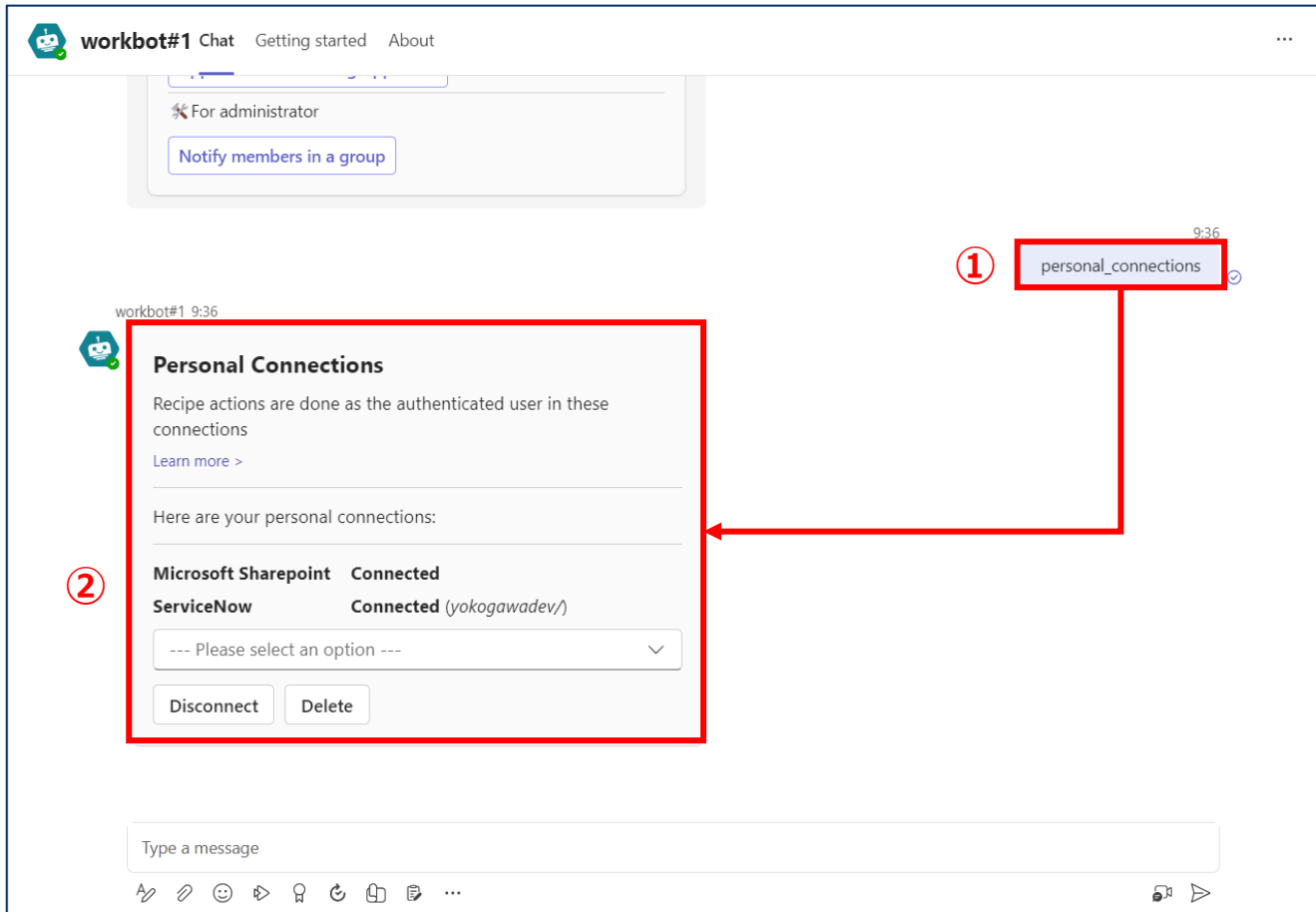
You receive the “Connection successful” message in Teams.



9-3. Manage personal account connections

9-3. Manage personal account connections

- If your personal connection encounters an error, or if the connected account is not your account, you want to reconnect, please refer to the following steps.



- ① Send “personal_connections” command
Send the “personal_connections” command to the “workbot#1” chat.

- ② Confirm personal connections
The connection’s status of the team user is listed in the “Personal Connections” message.

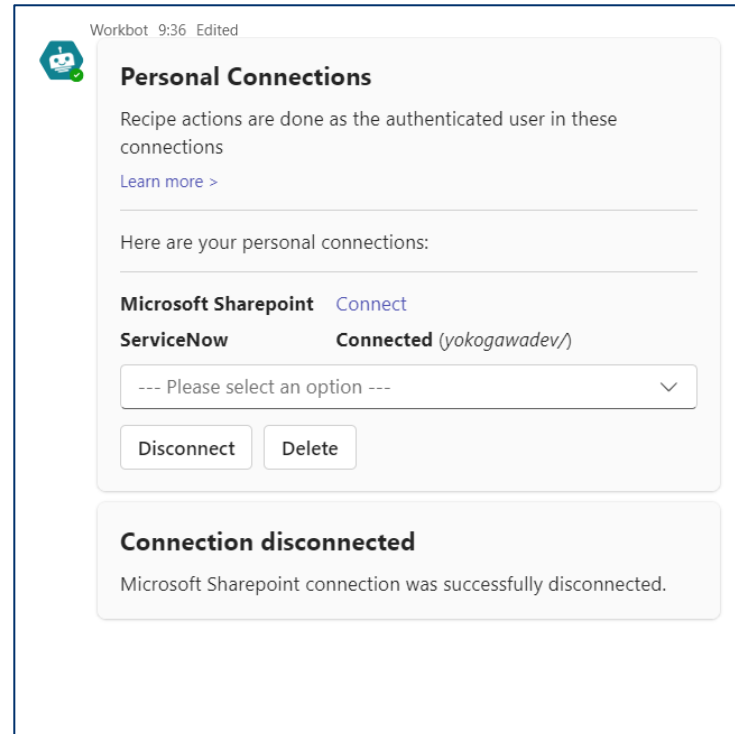
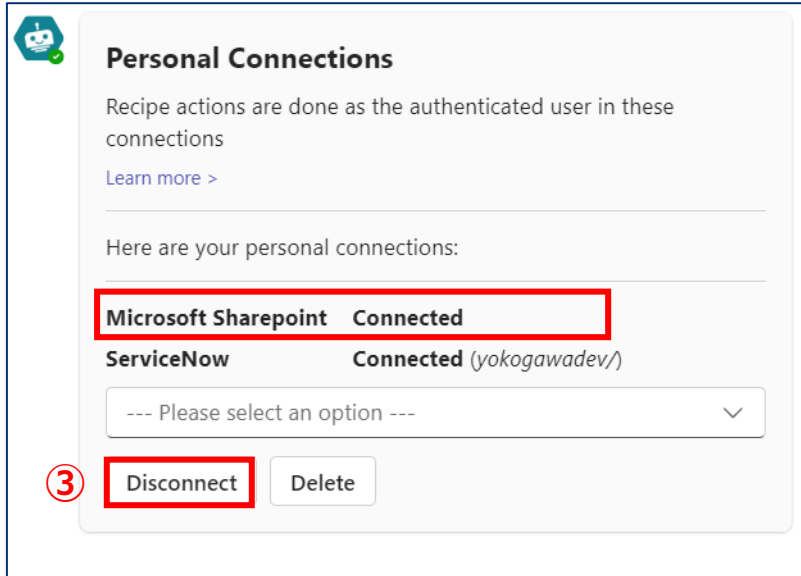
※Points of Attention

This command is provided by “workbot#1” as a formula, so it is currently only supported in English.

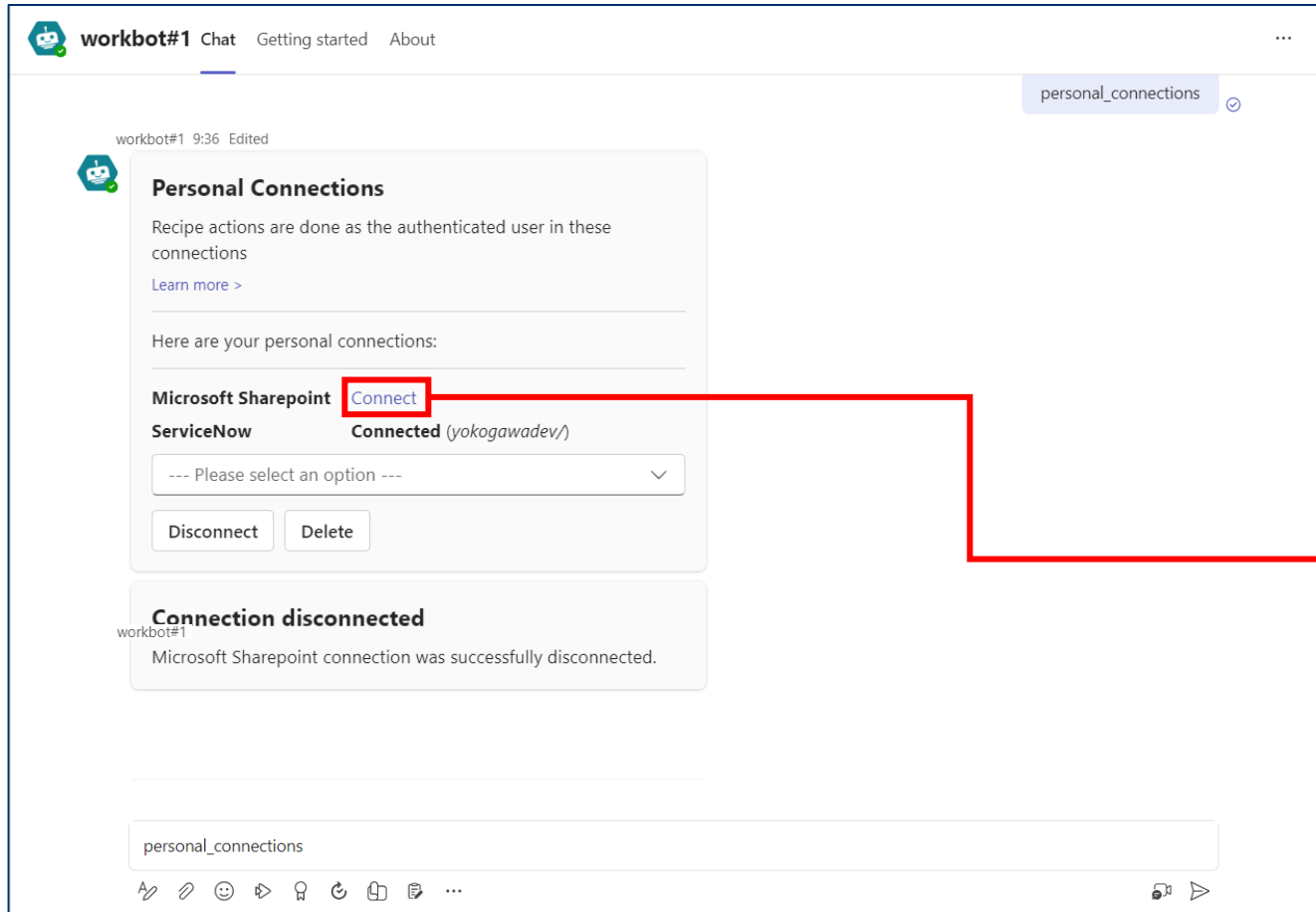
9-3. Manage personal account connections

■ ③ Disconnect

- Select the connection that you want to disconnected from the drop-down list.
- Click the “Disconnect” button.
- The selected connection will be disconnected, and the “Personal Connections” message will be updated.
- Receive the “Connection disconnected” message as below.

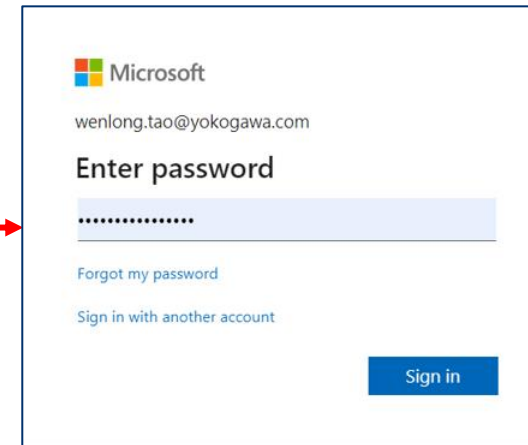


9-3. Manage personal account connections



■ ④ Reconnect

Click the “Connect” hyperlink to the right of the connection will take you to browser to connect.



※Points of Attention

It is recommended that you clear your browser's login cookies before reconnecting.

Co-innovating tomorrow™

Thanks