Operation manual for creating ServiceNow Incident Tickets via Teams

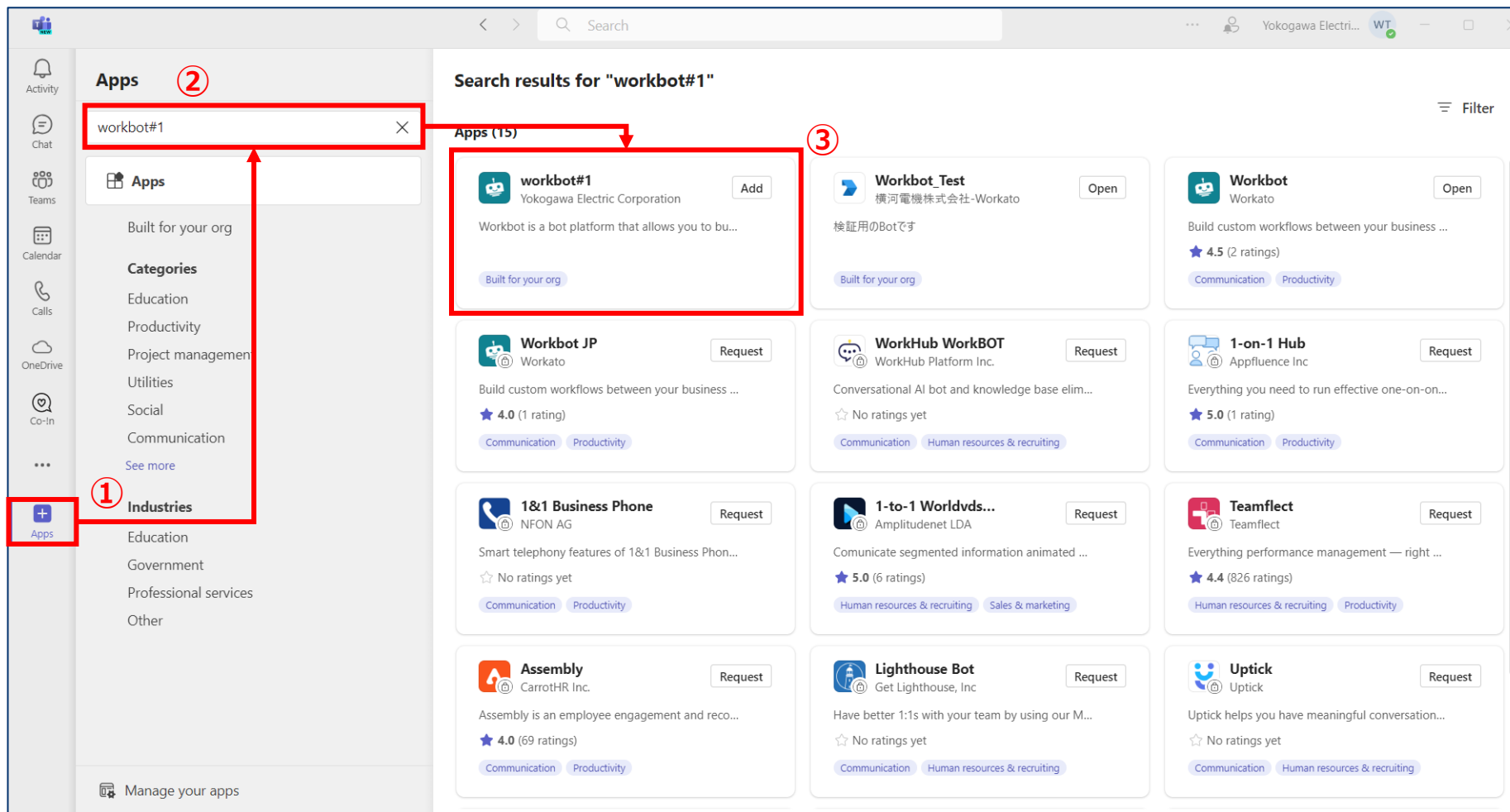**ODC-C**

Aug 10, 2024

Contents

1. Activate the "workbot#1"
2. Start the "workbot#1"
3. Display main menu
4. Create incident ticket using "workbot#1"
5. Receive the incident's notification
6. Add attachment to incident
7. View your incident tickets
8. Change "workbot#1" display language
9. Connect to personal account

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1. Activate the "workbot#1"

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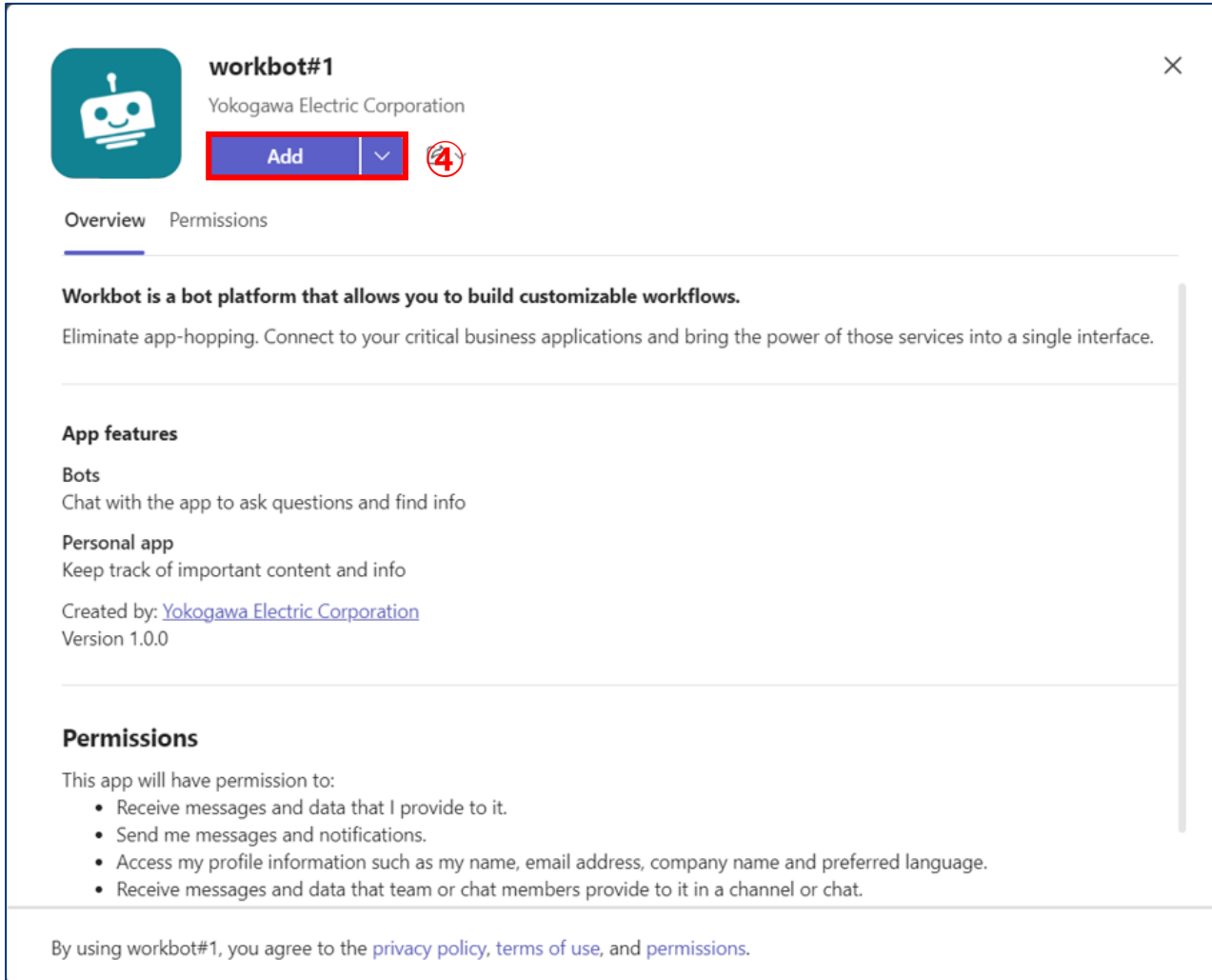
1. Activate the "workbot#1"

■ 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"

■ ④Add "workbot#1"
Click the "Add" button.

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2. Start the "workbot#1"

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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

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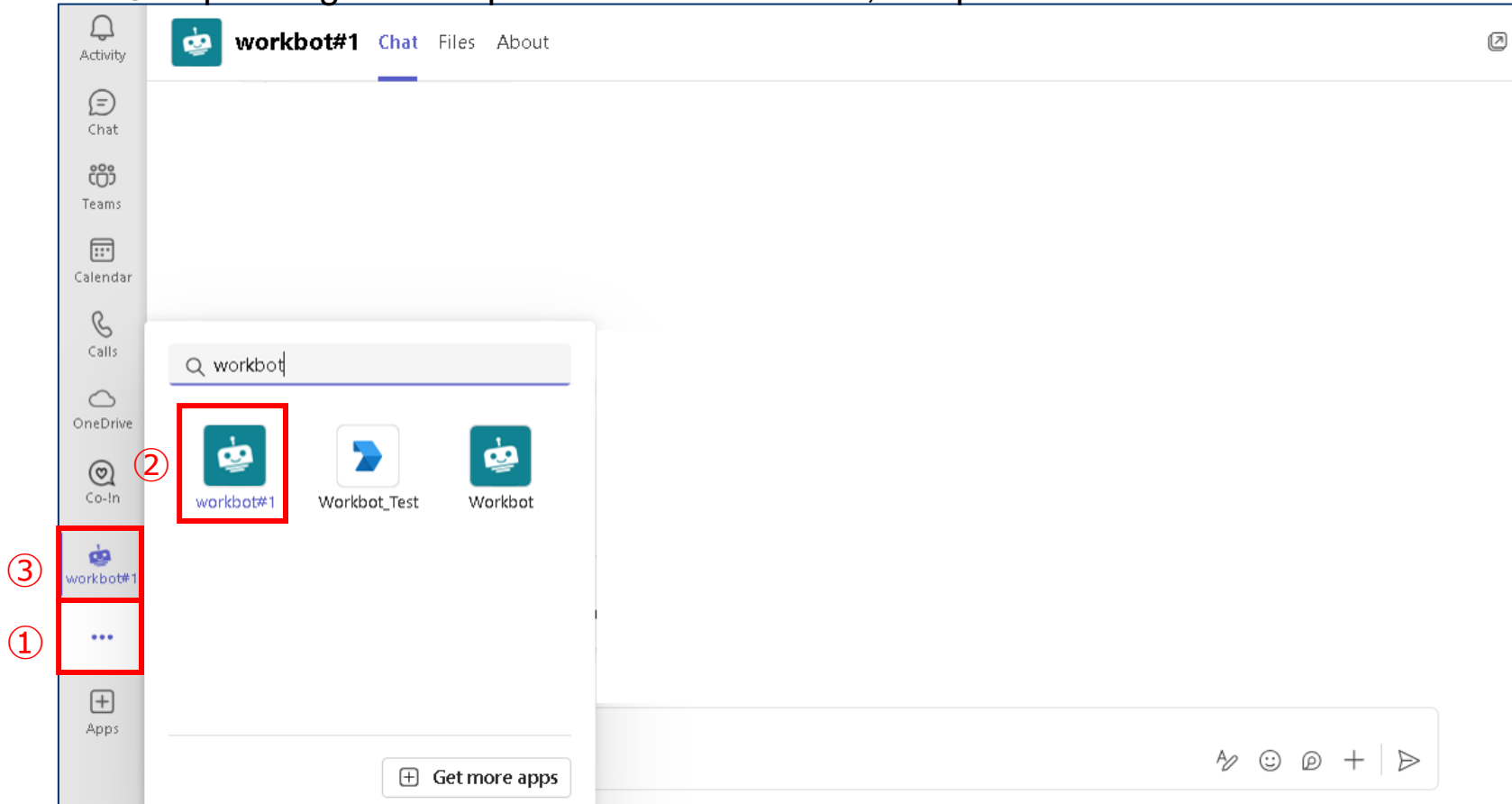
3. Display main menu
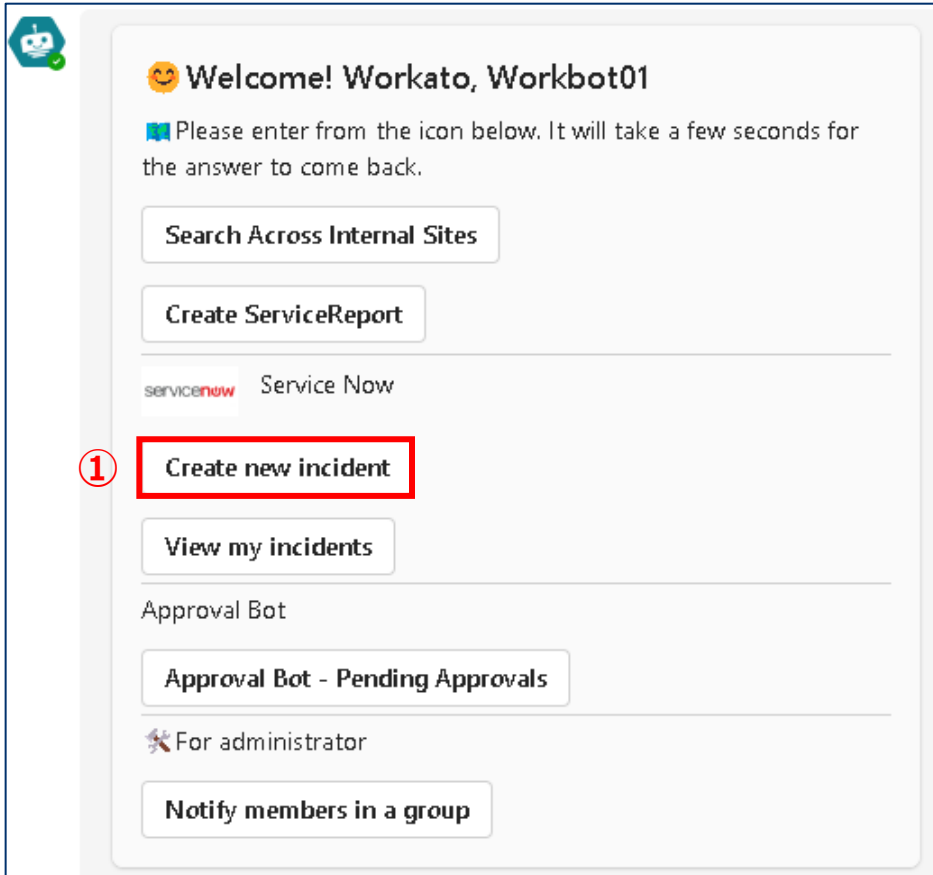
- Display main menu
  - ①Click on the input box in the 'workbot#1' dialog box, as 'help' is automatically displayed, please click on it.
  - ②Once you have entered 'help', please press the enter key or click the send button.
  - ③The main menu appears.

4. Create incident ticket using "workbot#1"

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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.
>
>
>
> 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".

■ ②**Choose "Business Service"**
  （Not Necessary）
Choose the business service for the incident ticket.

■ ③**Click "Continue" button**
Click the "Continue" button to continue creating the incident ticket.

■ ④**Choose "Category"**
Choose the category for the incident ticket.

■ ⑤**Click "Continue" button**
Click the "Continue" button to continue creating the incident ticket.

■ ⑥**Choose "SubCategory"**
  （Not Necessary）
Choose the sub's category for the incident ticket.

■ ⑦**Click "Continue" button**
Click the "Continue" button to continue creating the incident ticket.

■ ⑧**Choose "Urgency"**
Choose the urgency for the incident ticket.

■ ⑨**Enter "Subject"**
Enter the subject for the incident ticket.

■ ⑩**Enter "Description"**
Enter the description for the incident ticket.

■ ⑪**Click "Translate" button （Not Necessary）**
Click the "Translate" button to translate subject and description into English.
(Only can translate the non-English to English.)

■ ⑫**Check translated result**
Check that the translation of the subject and description meets your requirements.

■ ⑬**Enter "Shared Emails" （Not Necessary）**
Enter the shared emails for the incident ticket.

■ ⑭**Click "OK" button**
Click the "OK" button to continue creating the incident ticket.

■ ⑮Check incident ticket
Make sure the incident information is correct.

■ ⑯Click "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.)

■ ⑰Send 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

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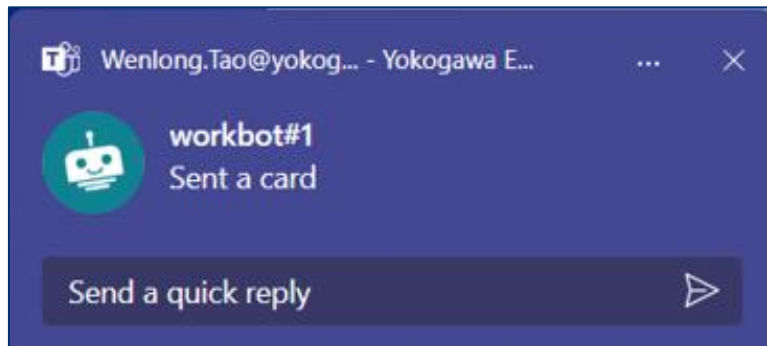
※Points of Attention
- Only the incident tickets created via Teams.
- Please note that the incident tickets created by email, phone or web pages will not be displayed in the messages and inbox on the Teams.

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

■ 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.

■ Scenario2: When the helpdesk change the ticket status to "resolved", the incident caller will receive the incident resolved message as below.

■ 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.

■ Scenario3: When the helpdesk change the ticket status to "closed", the incident caller will receive the incident closed message as below.

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

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6-1. Add SharePoint file to incident

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

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

■ ③**Click "SharePoint/Teams" button**
Click the "SharePoint/Teams" button, then you can see the URL text input box.

■ ④**Enter file link**
Paste the link you just copied into the URL input box.

■ ⑤**Click 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".

■ ⑥**Confirm added attachment file**
The file is added to the incident.

6-2. Add Teams channel file to incident

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6-2. Add Teams channel file to incident

■ 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.

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※Prerequisites

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

■ ⑥**Click "SharePoint/Teams" button**

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

■ ⑦**Enter file link**

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

■ ⑧**Click 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".

■ ⑨**Confirm added attachment file**

The file is added to the incident.

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6-3. Add Local file to incident

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

- ■ ①Click the "Local File/OneDrive" button on the incident detail screen.
- ■ ② "workbot#1" will return the "Please upload File" message.
- ■ ③Click the "+" button in the lower right corner.
- ■ ④Click the "Attach file" button.
- ■ ⑤Click "Upload from this device" and select the local file.
- ■ ⑥The 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".

7-3. Add Local file to incident

※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.

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6-4. Add OneDrive file to incident

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6-4. Add OneDrive file to incident

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

- ①Click the "Local File/OneDrive" button on the incident detail screen.
- ② "workbot#1" will return the "Please upload File" message.
- ③Click the "+" button in the lower right corner.
- ④Click the "Attach file" button.
- ⑤Click "Attach cloud files" and select the OneDrive file.
- ⑥The 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".

6-4. Add OneDrive file to incident

※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.

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

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

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

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Home | Knowledge | Service Catalog | Ticket History ▾ | WT Wenlong Tao

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Search 🔍

[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

WT **Wenlong Tao**
2024-05-21 14:42:08
INC0816666 Created

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

② **Attachments** 📎

Drop files here

7. View your incident tickets

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7. View your incident tickets
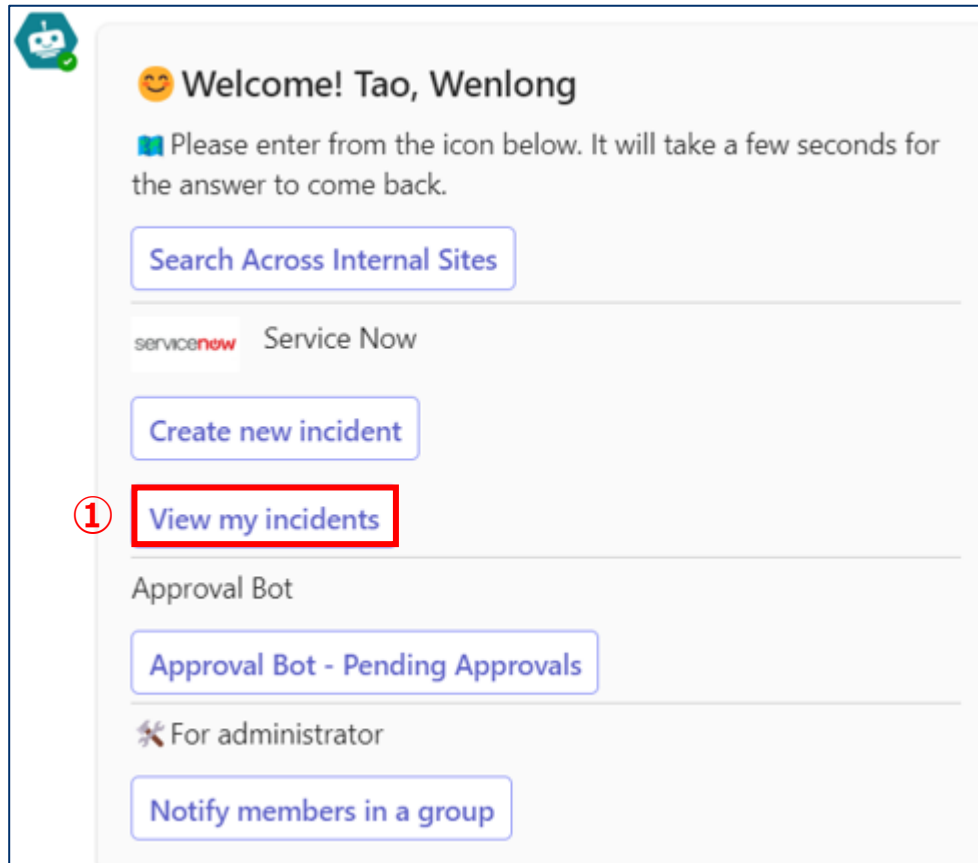
- ■ ①**Click "View my incidents" button**
Click the "View my incidents" button in the main menu, then you can see the below "Total number of incidents" message.

※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.

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7. View your incident tickets

Total number of incidents: 51

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

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

[INC0690666] Incident Information ③

Number

INC0690666

Category

Infrastructure Services

[INC0690665] Incident Information

Number

INC0690665

Category

Business Application Services

5 / 13   Next 5 ④

■ ②**Click "Details" button**
Click on the "Details" button of a state to open this state's incidents that sent via Teams.

■ ③**Displayed incident information**
Sort by the oldest creation time of the incident tickets and display the top 5 incident tickets.

■ ④**Display 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.

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8. Change "workbot#1" display language

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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.

■ **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:

■ **①Open the Teams Settings**
Click the "Settings" button of Teams. Then will open the Teams settings screen.

■ **②Click "Appearance and accessibility"**
Click "Appearance and accessibility" on the "Settings" menu.

■ **③Select 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.

■ **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.
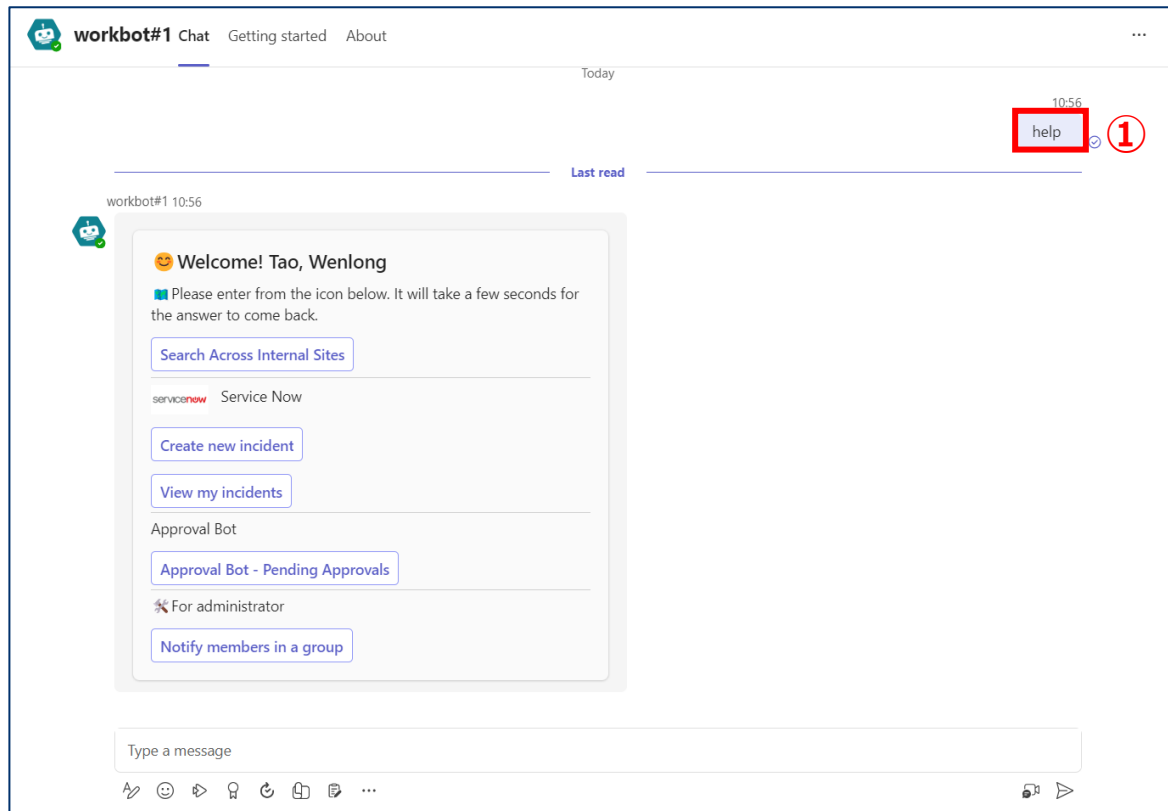
■ **①Send "help" command**

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

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9. Connect to personal account

9-1. Connect to ServiceNow

9-2. Connect to Microsoft SharePoint

9-3. Manage personal account connections

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9-1. Connect to ServiceNow

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9-1. Connect to ServiceNow

■ If your ServiceNow account is not connected, you will see the "Connect to ServiceNow" message.
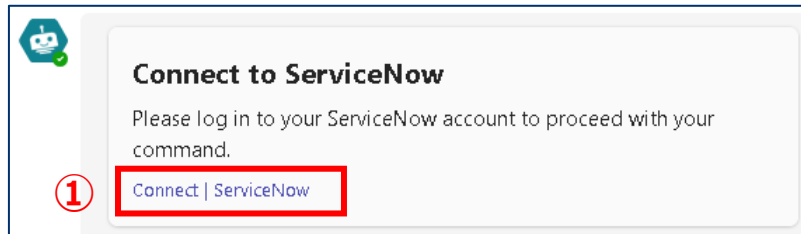
■ **①Click "Connect | ServiceNow"**
Click the "Connect | ServiceNow" hyperlink, then will open the "login page" in your browser.

■ **②Login 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".)

■ **③Allow the connection**
Click the "Allow" button, then will connect to your ServiceNow account.
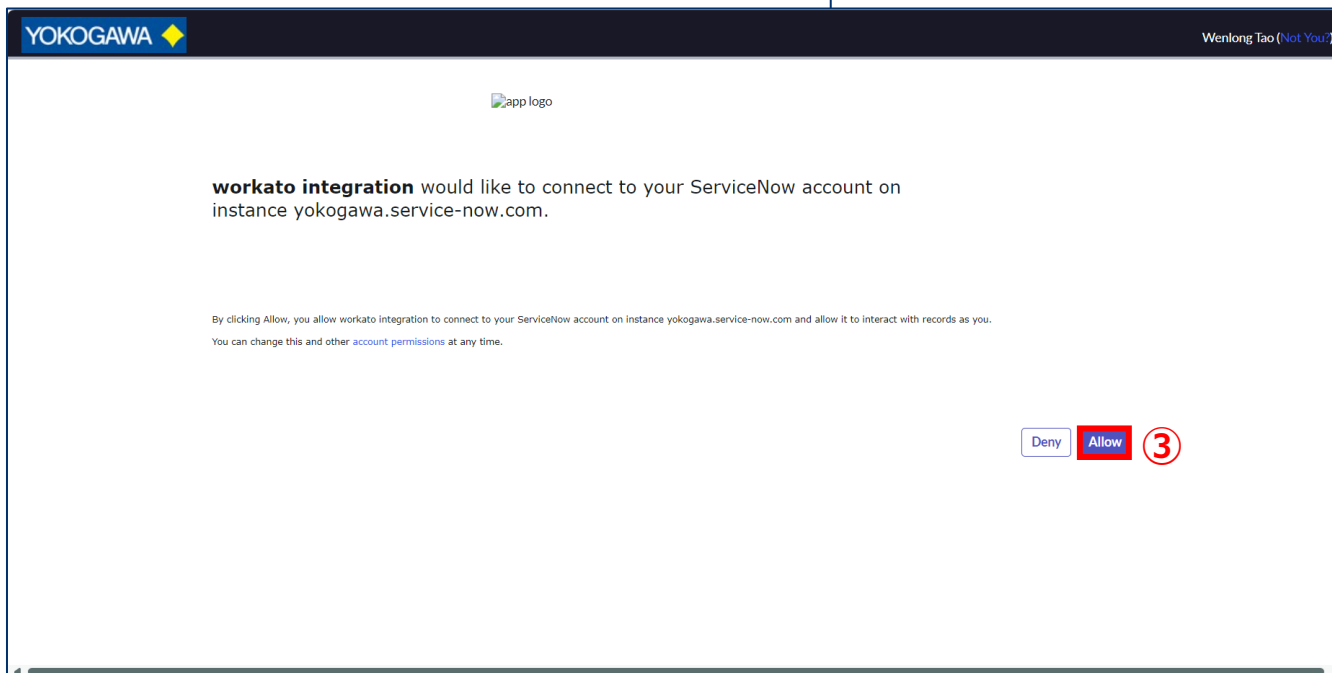
You can confirm the login account in the upper right corner of the "allow page", and you can click on the "Not You?" hyperlink to return to the "login page".

■ **④Confirm success message on browser**
If you allow it, the browser will display "You've successfully connected to ServiceNow!" message.
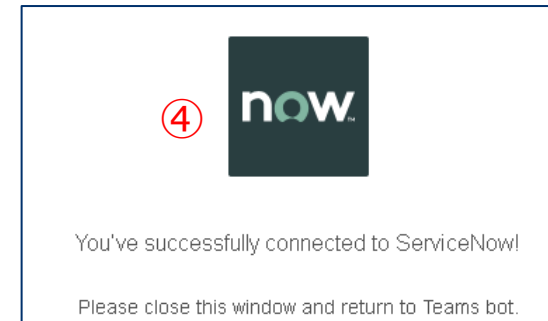
■ **⑤ Confirm success message in Teams**
You receive the "Connection successful" message in Teams.

9-2. Connect to Microsoft SharePoint

■ **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**
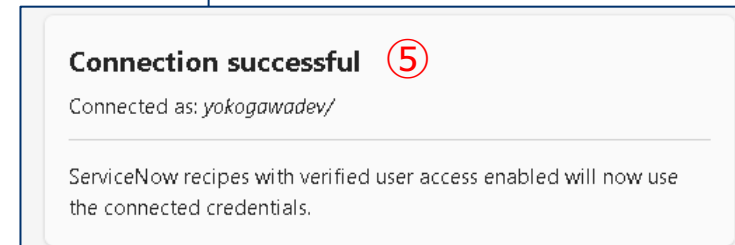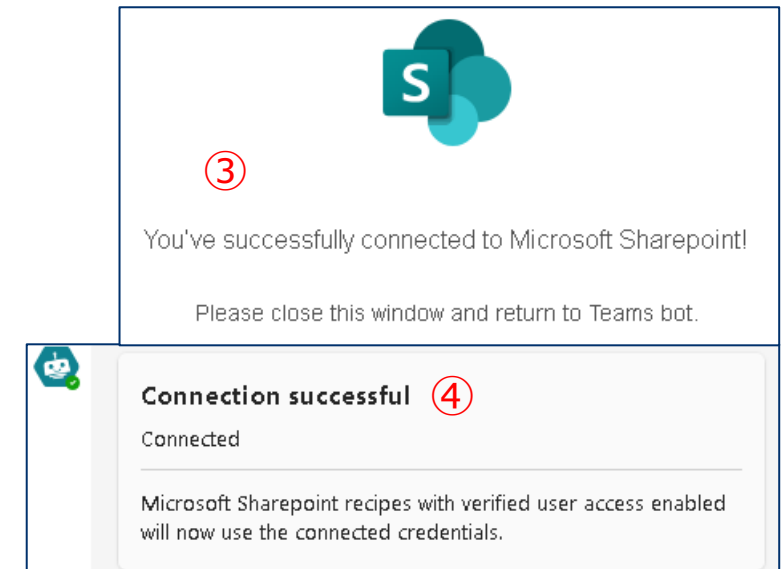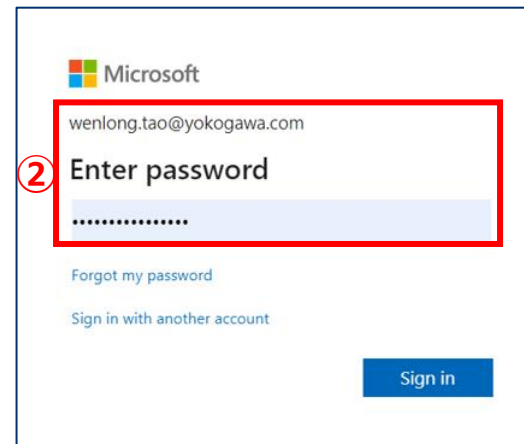When verification is completed, the browser will display "You've successfully connected to Sharepoint!" message.

- ■ **④Confirm success message in Teams**
You receive the "Connection successful" message in Teams.

Connect to Microsoft Sharepoint

Please log in to your Microsoft Sharepoint account to proceed with your command.

① Connect | Microsoft Sharepoint

Microsoft

wenlong.tao@yokogawa.com

② Enter password

••••••••••••••

Forgot my password

Sign in with another account

Sign in

③ You've successfully connected to Microsoft Sharepoint!

Please close this window and return to Teams bot.

Connection successful ④

Connected

Microsoft Sharepoint recipes with verified user access enabled will now use the connected credentials.

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9-3. Manage personal account connections

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■ 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.
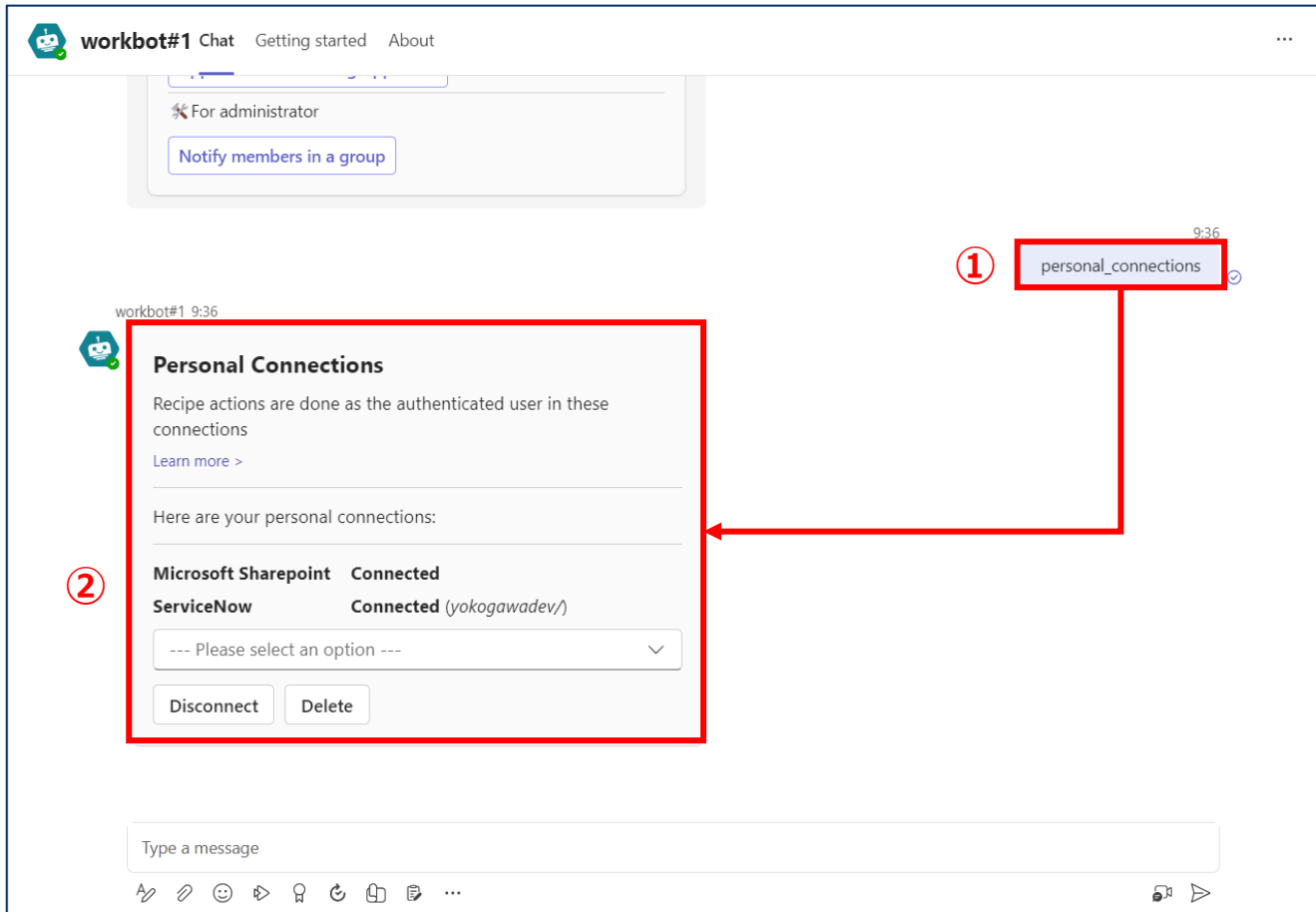
■ **①Send "personal_connections" command**
Send the "personal_connections" command to the "workbot#1" chat.

■ **②Confirm 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.

③Disconnect
- Select the connection that you want to disconnected from the drop-down list.
- Click the "Disconnect" button.
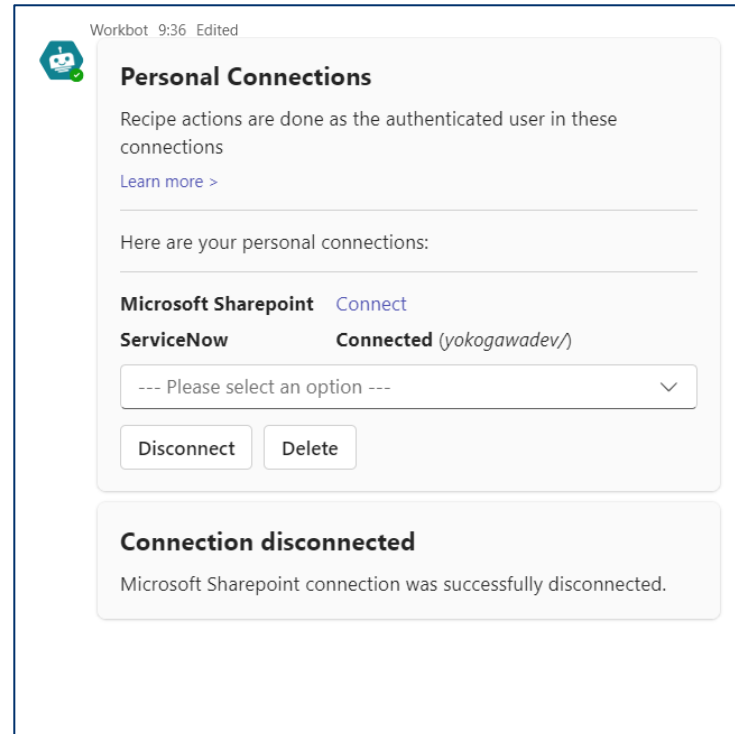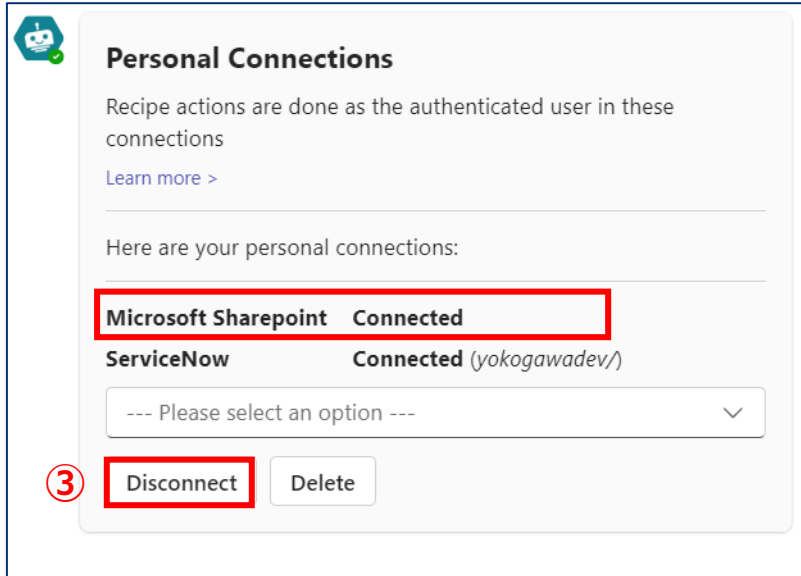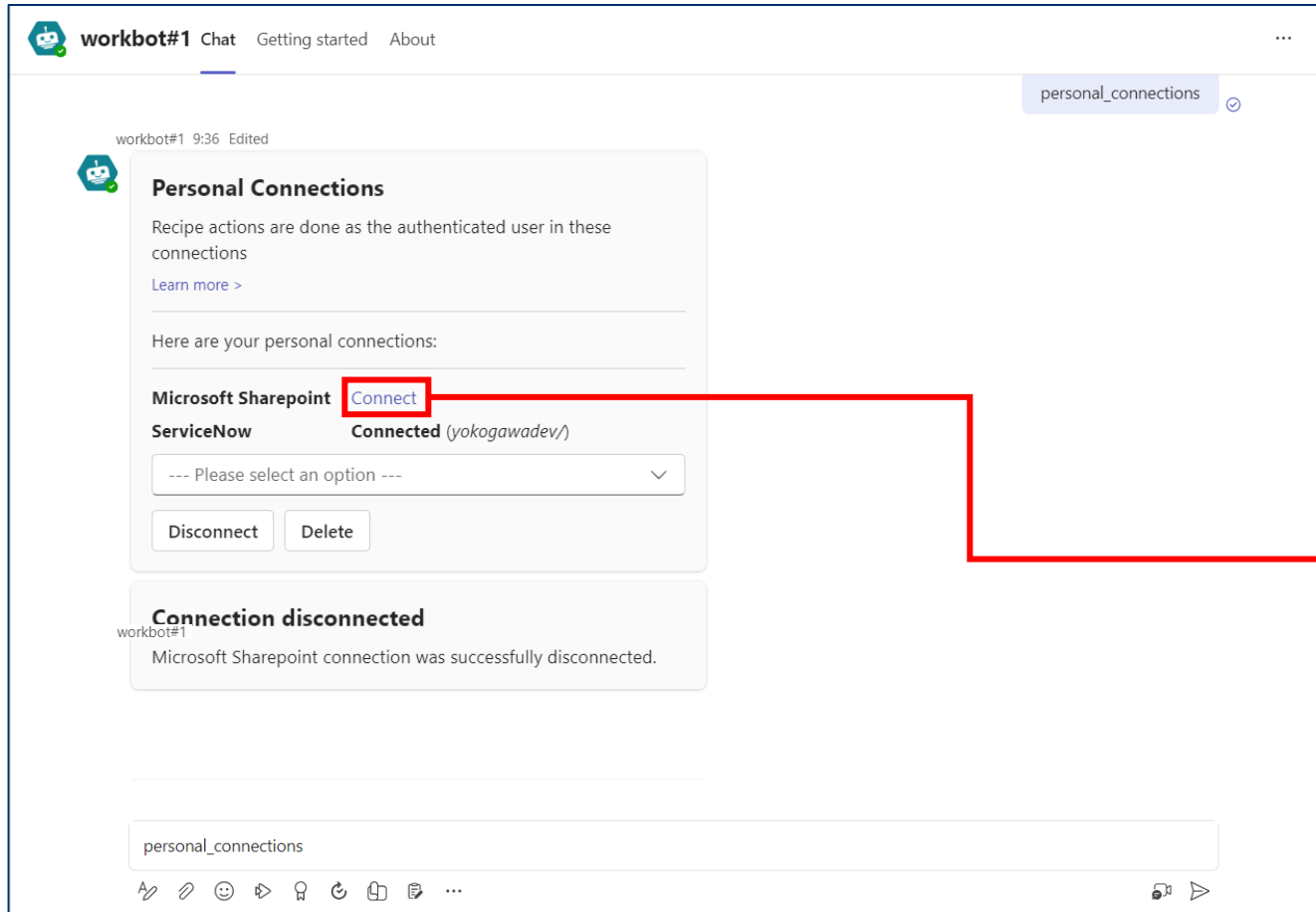- The selected connection will be disconnected, and the "Personal Connections" message will be updated.
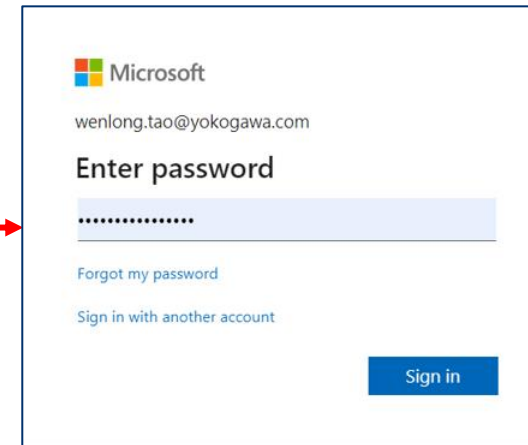- Receive the "Connection disconnected" message as below.

9-3. Manage personal account connections

■ ④Reconnect
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.

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Thanks