

ServiceNow Procedure for Handling ONEIO Ebonded Records

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ServiceNow Procedure for Handling ONEIO eBonded Records

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SERVICENOW PROCEDURE FOR HANDLING EBONDED RECORDS

Objective

The purpose of this document is to provide helpdesk agents and resolvers with a comprehensive procedure outlining the functionality of the eBond solution. This guidance serves as an essential resource to ensure a consistent and effective approach to managing user queries, requests and incidents. By documenting these procedures, we highlight the importance of standardized practices, which facilitate timely and accurate responses to user issues. Furthermore, having a well-defined document enhances knowledge sharing among team members, reduces response times, and ultimately improves user satisfaction. Such clarity in operations not only reinforces the efficiency and reliability of the helpdesk but also fosters a collaborative environment for ongoing improvement in service delivery.

The solution itself is covered in technical detail in the accompanying HLD and LLD documentation, however, key functionalities from an end user perspective are reiterated herein to provide proper

understanding of the end-to-end process and facilitate handling eBonded service requests and incidents.

Scope

The eBond integration between Fresenius Medical Care (FMC) and Fresenius Digital Technology (FDT) ServiceNow instances via ONEiO supports raising requests and incidents pertaining to the post-split SAP services under the TSA. This allows FMC employees to seamlessly request support directly from the Service Portal by using one of the dedicated catalog items, or by contacting the IT Help Desk via established channels. While the solution itself might be expanded in the future, currently the following use cases are in scope for SAP-related issues, queries and provisioning requests that can be sent to FDT for fulfillment:

- Incident Module
- Failures
- Non-incidents
- Service Request Management Module
- Requests

When trying to establish connection from FME to FDT, in addition to creating incidents in the back-end by Help Desk agents or any authorized individuals, end users can also trigger the integration with the help of the eBond-ready catalog items listed below:

1. SAP issue or small request - Fresenius Medical Care
2. SAP Password Reset - Fresenius Medical Care
3. SAP Process Portal Access - Fresenius Medical Care
4. Retire SAP Process Portal Access - Fresenius Medical Care
5. SAP GRC Central Access Creation - Fresenius Medical Care

Major Incidents remain out of scope of the eBond solution and should be reported under the dedicated Major Incident Management process in order to ensure proper governance as well as appropriate response and resolution times.

INSTRUCTIONS FOR END USERS

1. How to Submit an SAP Incident via eBond

Through the IT Help Desk

- Step:
 1. Contact the IT Help Desk and describe your needs:
- Phone:
- Email:
- Service Portal URL: <https://fmcna.service-now.com/sp>
- Other:

Through the Service Portal

- Step:
 1. Access the Service Portal.
 2. Log In with your username, password and security token.

3. Look up the 'SAP small issue or request' record producer.

4. Fill out the form, provide attachments (if required), and press 'Submit'.

*This record producer does not support raising P1 priority incidents/queries.

2. How to Submit an SAP Request via eBond

Through the IT Help Desk

• Step:

2. Contact the IT Help Desk and describe your needs:

• Phone:

• Email:

• Service Portal URL: <https://fmcna.service-now.com/sp>

• Other:

Through the Service Portal

• Step:

1. Access the Service Portal.

2. Log In with your username, password and security token.

3. Look up and use a dedicated request form depending on your needs:

• SAP Password Reset - Fresenius Medical Care

• SAP Process Portal Access - Fresenius Medical Care

• Retire SAP Process Portal Access - Fresenius Medical Care

• SAP GRC Central Access Creation - Fresenius Medical Care

4. Fill out the form, provide attachments (if required), and press 'Submit'.

*Please take extra care while providing the SAP Username and ensure it is correct and pertains to the individual the service is being requested for.

3. How to Update an Ongoing SAP Incident/Request via eBond

• Step:

1. Contact the IT Help Desk via established channels.

2. Use the chat bot to provide or request an update.

3. Access your open incident/request record from the Service Portal and update the record directly.

INSTRUCTIONS FOR SUPPORT STAFF

Partner Systems

FMCNA (FMC): <https://fmcna.service-now.com>

FNC (FDT): <https://fnc.service-now.com>

Middleware

ONEiO: <https://oneio.app/>

Supported Transactions

eBond between Fresenius Medical Care and Fresenius Digital Technology supports the following transaction types which are handled by ONEiO:

- Create (FME -> FDT)
- Update (FME <-> FDT)
- Resolve (FME <-> FDT)
- Cancel (FME <-> FDT)
- Close (FDT -> FME)

eBond remains active until incident closure and there is no way of breaking it before that time. An incident or a request is expected to be eBonded until it is seen through completion and there are built in methods to indicate and transfer ownership between parties.

While incident resolution can happen on either side depending on the issue at hand, incident closure is always driven by FDT due to the different time windows for automatic incident closure. With that being said, it has been agreed to allow 5 working days for automated incident closure in line with FDT's incident management process as most resolutions are expected to occur on the FDT end. More on these transaction types can be found in dedicated descriptions below.

Incident Management (Back-end)

1. Establishing eBond [Create]

- eBond can only be triggered from the FMCNA (FME) to FNC (FDT) ServiceNow instance, and not vice versa.
- eBond can only be triggered for priority P2-P4 incidents; attempting to eBond a P1 incident will result in an error.
- eBond can only be triggered for SAP services in scope of the TSA agreement:
- 'service_offering' table where Vendor = Fresenius Digital Technology GmbH
- eBond is established by assigning an incident record to the following assignment group:
- DTI-NA-SAP-EBOND
- The eBond assignment group is only available for selection to members of the following groups:
- DTI-Global-CAPG-EUX-WW_Service_Desk-DE_FLS - L3
- DTI-Global-CAPG-EUX-WW_Service_Desk-EN_FLS - L3
- DTI-EUX-IncidentManagers
- DTI-EUX-HCL-HelpDesk-L1
- eBond cannot be triggered for incident records that already have a Correlation ID belonging to another integration. If this is attempted, ONEiO will send an error message to the work notes and reassign the incident back to the Help Desk queue:
- TI-Global-CAPG-EUX-WW_Service_Desk-DE_FLS - L3DE_FLS_Capgemini
- eBond can only be triggered for incidents that are in state 'New' or 'In Progress'
- Attachments are allowed upon creation so long as they adhere to the existing ServiceNow restrictions (file type, file size).
- Once the eBond assignment group is selected, the user receives a warning popup informing them that choosing the group and saving the record will establish a connection with an external system.
- An appropriate SAP service needs to be selected once the eBond group is locked in.

- eBond supports data mapping for the following fields and updating them in either system will trigger appropriate response:

- Priority
- Category/Subcategory
- Short description
- Description
- Service

- Once eBond is established, the incident record in question will have the 'Correlation ID' field populated with the number assigned in the external system visible in both the incident form view and the incident list view on the incident table.

- Once eBond is established, ONEiO will automatically change the state of the incident from 'New' to 'In Progress' and populate the assignee field with a technical user account to indicate that the ticket was successfully eBonded and is being progressed outside of FMCNA.

- EBonded incidents are always directed to the SAP Dispatcher assignment group in FNC ServiceNow:

- Ext_EMEA_SAP_Dispatcher_Capgemini

- EBonded incidents in FNC ServiceNow are always created under the 'FME External User' user profile rather than the in the actual names of the individuals requesting support. This is based on agreements under General Data Protection Regulation (GDPR) and the fact that FMC user base is no longer available in FDT Active Directory. Relevant, personal information of the FMC users needed by FDT SAP fulfillers to complete eBonded cases is provided upon submission as a work note and limited to the following fields:

- Caller e-mail:
- Country:
- Caller title:
- Affected User e-mail:
- Patient:
- Clinic ID:
- Environment:
- Configuration item:
- Current Location:

- Work notes and Additional comments populated in FMC ServiceNow upon creation are delivered to FNC ServiceNow and will be visible to SAP fulfillers.

- FMC reference number is stored in FNC ServiceNow in the 'Related Records' tab in the 'External Incident IDs' field, as well as in the '3rd Party Relationships' tab in the related records section.

- Incident submission notification is triggered to the end user from FMCNA ServiceNow and is not governed by eBond.

2. Identifying Ownership

- The ownership of a given eBonded incident and who is meant to resolve it is easily identifiable by the current assignment group in FMCNA ServiceNow:

- FDT ownership and resolution: DTI-NA-SAP-EBOND

- FMC ownership and resolution: any other group
- Analogically, FDT support can identify ownership in a similar way based on the current selection in FNC ServiceNow:

- FDT ownership and resolution: any FNC internal assignment group (SAP or otherwise)
- FMC ownership and resolution: Ext_WW_FME_Global-Service-Desk_FLS_Capgemini (in state 'Awaiting', substate 'Local Customer IT feedback')

3. Updating eBonded Incidents [Update]

- EBonded incidents can be freely updated in either FMCNA or FNC ServiceNow instance.
- New attachments can be added.
- Priority changes done in both systems will be reflected accordingly and in line with the priority matrix mapping (attempting to raise priority to P1 will result in an error).
- Category/Subcategory changes will be reflected in the corresponding ServiceNow instance.
- Short description/Description changes will be reflected in the corresponding ServiceNow instance.
- Communication exchange:
 - All work notes populated in FMCNA ServiceNow are transferred to FNC ServiceNow.
 - All additional comments populated in FMCNA ServiceNow are transferred to FNC ServiceNow.
 - All additional comments populated in FNC ServiceNow are transferred to FMCNA ServiceNow.
 - Work notes populated in FNC ServiceNow are not transferred to FMCNA with the exception of updates done as part of switching responsibility and updates made upon incident resolution, i.e. internal proceedings of FDT SAP fulfillers are not being transferred to the corresponding FMC ticket or the end user by default.
 - When the responsibility lies with FDT, internal state and assignment group changes are not communicated to FMCNA.
 - When the responsibility lies with FDT and SAP fulfillers suspend an eBonded incident in a state other than 'Awaiting' substate 'Local Customer IT feedback', FMCNA will receive a work note with the name of the on-hold state in FNC informing of the action.
 - When responsibility lies with FMC, internal state changes and assignment changes are not communicated to FNC ServiceNow
 - When responsibility lies with FMC, all work notes and additional comments are transferred to the eBonded record in FNC ServiceNow.
 - Incident update notification is triggered to the end user from FMCNA ServiceNow and is not governed by eBond.

4. Responsibility shift from FDT to FMC [Update]

- When an eBonded incident being progressed by FDT SAP fulfillers is deemed out of FDT scope, the FDT team shall pass over the responsibility of the resolution to FMC by ensuring the following set of actions is carried out in FNC ServiceNow:
 - Assignment group change to: Ext_WW_FME_Global-Service-Desk_FLS_Capgemini
 - State change to: Awaiting
 - Waiting for substate: Local Customer IT feedback

- The above combination of actions will result in the assignment group being changed in FMCNA ServiceNow to:

- DTI-Global-CAPG-EUX-WW_Service_Desk-DE_FLS - L3

- From that moment on FMC can progress the case through completion. Work notes and additional comments will continue being delivered to the eBonded incident in FNC ServiceNow just in case a responsibility shift from FMC to FDT needed to happen.

- If the eBonded incident record is only assigned to the Help Desk queue without also suspending it, ONEiO will provide an adequate work note entry via error handling.

5. Responsibility shift from FMC to FDT [Update]

- When an eBonded incident being progressed by FMC fulfillers is deemed out of FMC scope, the FMC team shall pass over the responsibility of the resolution to FDT by assigning the incident to the following group (if not possible directly, then via the Help Desk with an appropriate work note/comment):

- DTI-NA-SAP-EBOND

- The above combination of actions will result in the assignment group being changed in FNC ServiceNow to:

- Ext_EMEA_SAP_Dispatcher_Capgemini

- From that moment on FDT can progress the case through completion.

6. Resolving eBonded Incidents [Resolve]

- Resolution of eBonded incident tickets can take place either in FMCNA or FNC ServiceNow instance.

- Incident resolution is the responsibility of the party that holds ownership over the eBonded incident record in question.

- Incident resolution cannot be forced by the party who is not in ownership of providing the resolution at a given time. If a resolution attempt takes place in the system where it is not supposed to, ONEiO will provide an adequate work note entry via error handling and revert the status change.

- EBond supports data mapping for all the required fields associated with incident resolution in both FMCNA and FNC ServiceNow instances.

- Resolution notes will be available in the eBonded incident record upon fulfillment for the requestors to familiarize themselves with.

- Incident resolution notification is triggered to the end user from FMCNA ServiceNow and is not governed by eBond.

7. Reopening eBonded Incidents [Reopen]

- Reopening of eBonded incident tickets can take place either in FMCNA or FNC ServiceNow instance.

- It is possible for end users to reopen their incident records in the event they do not agree with the provided resolution.

- Incident reopening can either be triggered by the end user directly from the ServicePortal or with the help of the Helpdesk Agents.

- When the state of an eBonded incident record changes to 'New' or 'In Progress', this will cause ONEiO to trigger its reopening in the same resolver queue it was resolved in.

- Incident reopen notification is triggered to the end user from FMCNA ServiceNow and is not governed by eBond.

8. Canceling eBonded Incidents [Cancel/Resolve]

- Cancellation of eBonded incident tickets can take place either in FMCNA or FNC ServiceNow instance.
- From an IM perspective, FDT does not use a dedicated state to cancel an incident, instead an appropriate combination of the 'Resolved' state with a 'Cancelled by caller' or 'Cancelled (No Action)' close code is used to indicate cancellation.
- Incidents canceled in FMCNA ServiceNow instance become locked out from further updates, much like closed records. This will trigger incident resolution in FNC ServiceNow, and subsequently auto-closure after 5 days.
- Per agreements, Incidents canceled in FNC ServiceNow get resolved, not cancelled, in the following assignment group in FMCNA and can still be reopened by end users within 5 days if required:
- DTI-NA-SAP-EBOND
- Incident cancellation notification is triggered to the end user from FMCNA ServiceNow and is not governed by eBond.

9. Closing eBonded Incidents [Close]

- Closure of eBonded incident tickets effectively ceases eBond between associated records.
- Per IM process, neither FMCNA nor FNC ServiceNow end users are offered the ability to manually close incidents.
- Closure happens automatically and in accordance with a defined cadence, different in both ServiceNow instances.
- For the purpose of eBond, per agreements, the solution adheres to FDT's auto closure process which triggers record closure after 5 days, which for FMC is typically much longer.
- Once the eBonded incident record is closed in FNC ServiceNow, ONEiO sends a corresponding communication to FMCNA ServiceNow forcing a closure. This is meant to keep records in sync and only allow users to reopen cases within the agreed period of time.
- Once auto closure happens, both records become locked for editing thus requiring a new one be opened if necessary.

Service Request Management (Back-end)

Fresenius Medical Care end users can request SAP services under TSA from Fresenius Digital Technology by using one of the agreed upon catalog items available from the Service Portal. The source of eBond is always a request created by an FMC employee or a Help Desk agent action on their behalf. The reverse direction/creation is not supported, i.e. request creation from FNC to FMCNA ServiceNow is not possible, although updates are bidirectional.

These catalog items available in FMCNA ServiceNow have their counterparts created in FNC ServiceNow, albeit with adjusted workflows in order to facilitate eBond. The solution uses an Out of The Box (OOTB) Cart API that transfers information contained in the associated variables populated in records originating in FMCNA to FNC ServiceNow.

Much like Incidents, eBonded Service Requests raised by end users in FMCNA ServiceNow are created in FNC ServiceNow under a technical user profile 'FME External User' but do contain all pertaining personal information required by FDT SAP fulfillers, such as the email address or SAP username.

A request created in FMCNA ServiceNow will have a requested item created alongside it. If an approval is not required, that requested item will be eBonded with FNC ServiceNow with the help of ONEiO. This will result in the creation a corresponding request, requested item and a fulfillment task to be processed by the required personnel. Once the fulfillment task is closed as complete, all associated and eBonded

records will have their states synchronized accordingly thus completing the process.

Below is a brief summary of the eBond request fulfillment process for the SAP services in scope.

1. SAP Password Reset - Fresenius Medical Care

- Request submitted from the Service Portal.
- Fully automated process.
- Not possible to raise a request on behalf of someone.
- Does not require an approval.
- The end user is required to provide their SAP username along with the SAP system and client.
- The end user can opt to only unlock their account, or request a full password reset together with the account unlock.
- Once submitted the request is eBonded with FNC ServiceNow and automatically fulfilled.
- The end user receives an email notification from the SAP system advising of a successful fulfillment together with a new password, if requested.
- If an error occurs during fulfillment, an error handling task is created in FNC ServiceNow, the associated error message is sent in an update to FMCNA ServiceNow and the user gets informed accordingly.

2. SAP Process Portal Access - Fresenius Medical Care

- Request submitted from the Service Portal.
- Requires Line Manager approval.
- Possible to raise a request on behalf of someone.
- Once approved, eBond triggers and creates corresponding records in FNC ServiceNow.
- Upon the completion of the fulfillment task in FNC ServiceNow, the associated records in FNC ServiceNow and the eBonded records in FMCNA get their states synced and the process is complete.
- Upon the completion of the process, the end user gets a CMDB entry created in their name signifying that SAP Process Portal access was granted. The record is stored in the following FMCNA ServiceNow table in the 'Installed' state:
 - 'u_cmdb_ci_sap_process_portal'
- Request completion notification is sent out of FMCNA ServiceNow to the end user.

3. Retire SAP Process Portal Access - Fresenius Medical Care

- Request submitted from the Service Portal.
- Requires Line Manager approval.
- Possible to raise a request on behalf of someone.
- Requires a CMDB record present in the following FMCNA ServiceNow table:
 - 'u_cmdb_ci_sap_process_portal'
- Once approved, eBond triggers and creates corresponding records in FNC ServiceNow.
- Upon the completion of the fulfillment task in FNC ServiceNow, the associated records in FNC ServiceNow and the eBonded records in FMCNA get their states synced and the process is complete.

- Upon the completion of the process, the end user gets their associated CMDB entry created in their name updated signifying that SAP Process Portal access was revoked. The state of the CI record gets changed from 'Installed' to 'Retired'.

- Request completion notification is sent out of FMCNA ServiceNow to the end user.

4. SAP GRC Central Access Creation - Fresenius Medical Care

5. Request submitted from the Service Portal.

- Does not require an approval.

- Possible to raise a request on behalf of someone.

- Once submitted, eBond triggers and creates corresponding records in FNC ServiceNow.

- Upon the completion of the fulfillment task in FNC ServiceNow, the associated records in FNC ServiceNow and the eBonded records in FMCNA get their states synced and the process is complete.

- Request completion notification is sent out of FMCNA ServiceNow to the end user.