National Finance Center
Business Service Management
ServiceNow Customer Service Portal
User Guide
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Welcome Statement

Welcome to the National Finance Center (NFC) Business Service Management (BSM) ServiceNow Customer Service Portal User Guide. This guide is for Customer Support Portal External Users. Included is guidance for basic ServiceNow ticket management features and navigating the Customer Service Portal as well as following the progress of a ticket from submission to closure. This user guide is strictly for Customer Service Portal authorized users.
Chapter 1 - Introduction - Overview of Customer Service Portal View

This section includes the following topics:

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Purpose of Customer Service Portal

The National Finance Center's (NFC) Business Service Management (BSM) ServiceNow Customer Service Portal (CSP) is the automated ticket tracking system for NFC.

The NFC BSM ServiceNow CSP provides access for authorized users to submit tickets for one-time incidents and regularly requested services. It also provides access for those same authorized users to track the status of their submitted tickets and tickets submitted on their behalf.

Details and examples for each area of the NFC BSM ServiceNow CSP are included in this guide.

Difference between an Incident and a Service Request

In the definitions in Appendix A - Definitions (on page 23): an Incident is an event where something that was working before is now not working, and a Service Request is a normal day-to-day task.

Examples of Incidents:

• Security Incident
• Receiving an Error Message
• Insight, webTA, or other application issue.

Examples of Service Requests:

• Requesting new access to an application
• Modifying existing access
• Requesting assistance with resetting a password
• Submitting insurance changes
• Identifying a missed retirement contribution.

Note: Not everyone will see all of these examples, and these examples are not all encompassing. If an authorized user is unsure about which type of ticket to submit, check the available Service Request options before submitting an Incident.
Chapter 2 - Administration

This section includes the following topics:

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**To Log In (for Federated Users):**

A user is considered a Federated user if they login via eAuthentication.

1. Enter the URL for ServiceNow for Federated Users https://nfcerp.service-now.com into the Web browser.

Note: Users should operate NFC BSM ServiceNow using Google Chrome, Mozilla Firefox, or Microsoft Edge. NFC BSM ServiceNow does work using Internet Explorer, but images identifying buttons will not be visible.

The website will redirect you to the eAuthentication login page.

![eAuthentication Login Page](image-url)
2. Enter your eAuthentication User ID and Password.

    OR

Select the PIV login icon that allows the user to login by entering their eAuthentication personal identification number (PIN).

Once successfully logged in, the NFC BSM ServiceNow CSP home page is displayed.

To Log In (for Non-Federated Users):

A user is considered a Non-Federated user if they login by using a user name, password, and confirm that they are not a robot.

1. Enter the url for ServiceNow for Non-Federated Users

   Note: Users should operate NFC BSM ServiceNow within Google Chrome, Mozilla Firefox, or Microsoft Edge. NFC BSM ServiceNow does work within Internet Explorer, but images identifying buttons will not be visible.

   ![Accessing Federal Owned Systems Page](image)

   Figure 2: Accessing Federal Owned Systems Page

2. Enter your User name and Password.

3. Select the checkbox.
The checkbox confirms that the user is not a robot and will display a page containing pictures to identify as instructed. Once successfully logged in, the NFC BSM ServiceNow CSP home page is displayed.

Password Resets or Lock Outs

For Federated Users, the user must follow eAuthentication password reset procedures. On the login page, there are two available links for this purpose: I forgot my Password and Change my Password. If neither of these links provide the needed assistance, the eAuthentication help desk can be reached at 1-855-632-4468.

For Non-Federated Users, the user has three options to have their password reset. Users can select the Reset your password here link, they can reset their password by viewing their profile, or they can contact the National Finance Center’s Operations and Security Center (OSC) at 1-800-767-9641.

If after attempting to login and the user is still unable to access NFC BSM ServiceNow, they can contact OSC at 1-800-767-9641. If the user is new to NFC BSM ServiceNow, the process may require their ASO to submit an access request.

PII Violations, Warning Notifications, and Encryption of Documents

Upon login, and when attaching documentation, users will see warning notifications reminding of the protocol concerning PII and that it should not be included without encryption.

Management of PII violations:

In accordance with USDA Incident Response (IR) procedures and Departmental Agriculture Security Operations Center (ASOC) policy, NFC Security Practices adhere to these regulations:

- USDA DM 3505-000 – USDA Computer Incident Response Procedures Manual
- NFC Title VII, Chapter 14 Directive 7 – Personnel Security and Suitability Program

Therefore, the policies and procedures enforced at NFC apply to all systems, which includes NFC BSM – ServiceNow application.

Notification to IRT:

Should any of our service desk representatives or agents receive either an Incident or Service Request with visible PII, then the representative and/or agent must report the violation to the Incident Response Team (IRT). The agent will submit an IRT ticket and identify the Incident or
Service Request that was submitted in violation. The ticket can also be related to the submitted IRT ticket. The incident report will include the following information:

- Ticket number
- Reporting Service Desk agent
- Description of where PII was visible; (i.e., unencrypted attachment or in the details description).
- Information on which agency submitted the unfiltered PII.

Once the IR Team, reviews the records submitted in violation, they will notify the Service Desk agent and manager of actions taken to mitigate the exposure. Updates to user’s records will include recording any submitted unencrypted PII based on a monthly report.

**Three strikes – Removal of access:**

Should an end user have three violations within a 90-day period, then the NFC IRT manager will notify the submitter’s Agency Security Officer (ASO) or Security Coordinator of repeated violations. It will be determined between both Agencies what actions to take. Types of actions are remove access, give a warning, or retake Security Awareness training determined on a case-by-case basis.

Upon completion of the mitigating actions, each ASO or Security Coordinator will be required to reinstate the end user's access. Then, the Access Management Branch will restore the user’s access.
Chapter 3 - Customer Service Portal (CSP) Functional Overview

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Home Page

The NFC BSM ServiceNow CSP home page has links to multiple pages.

Figure 3: ServiceNow CSP Home Page
Service Banner

This banner is available on all pages of the NFC BSM ServiceNow CSP and can connect the user to pages otherwise accessed from the NFC BSM ServiceNow CSP home page.

The Service Banner is displayed.

![Service Banner](image)

**Figure 4: Service Banner**

*Open Tickets*
This menu provides a list of the most recent tickets submitted by the user that are currently in an open status. At the beginning of the list is a link that will take the user to a full list of these tickets. This link will only be visible whenever there are currently open tickets.

*Past Tickets*
This menu provides a list of the most recent tickets submitted by the user that are currently in a closed status. At the beginning of the list is a link that will take the user to a full list of these tickets.

*Knowledge*
This link will take the user to the same page as the Knowledge content link on the NFC BSM ServiceNow CSP home page. It provides a multitude of articles that may provide an answer to the user’s inquiry prior to submission of a ticket.

*Tours*
This menu provides a list of interactive guided tours that walk the user through a step by step process on how to use the NFC BSM ServiceNow application. Tours are available when the user is on certain pages.

*User Name*
This menu provides access to the user’s profile where the user may change their password, and a link to logout of the NFC BSM ServiceNow application.
Newsfeed

The Newsfeed is a scrolling feed of information as displayed.

![Outages and Events]

Figure 5: Newsfeed Page

Here, the users will see if there are any known issues affecting applications they may use, when those issues are resolved, and any other immediate information for the users. The Newsfeed may also broadcast any planned outages or upcoming release notes. The Newsfeed does not replace email notifications.
Knowledge: Search the Knowledge Base

The Knowledge content link brings the user to knowledge articles page which contain information that may provide answers to questions, and eliminate the need to submit a ticket; however, users are encouraged to submit a ticket if they are unable to find an answer or know that their request requires one.

The Knowledge: Search the Knowledge Base content link and Knowledge Article page are displayed.

![Knowledge: Search the Knowledge content Link](image)

**Figure 6: Knowledge: Search the Knowledge content Link**

The Knowledge Article page allows the user to search for articles by keyword (in the Search bar), or by topic using one of the three main topic boxes: Human Resources General Knowledge, Knowledge, and Social QA. Some articles are also readily available on this page, listed in the Featured, Most Useful, and Most Viewed boxes.

![Knowledge Article page](image)

**Figure 7: Knowledge Article page**
Request Items: Submit a Request

The *Request Items: Submit a Request* content link will take the user to the Service Catalog page.

The Service Catalog page allows the user to submit Service Request tickets based on the access they have been granted. The views provided will likely vary from what the user sees. The user can also adjust the view between the Card view and the Grid view.
Report an Issue: Submit an Incident

The *Report an Issue: Submit an Incident* content link will take the user to the Incident submission page.

![Report an Issue: Submit an Incident](image)

**Figure 11: Report an Issue: Submit an Incident**

The Incident submission page is used to submit tickets that are causing a work-stoppage. Incident summary options will be available based on the user's amount of access.
Chapter 4 - Navigation

This section includes the following topics:

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- Benefits Processing Officials (BPO) ............................................................ 15
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Agency Security Officials (ASO)

As an Agency Security Official, it is the ASO’s responsibility to create Security Incident tickets, access request tickets, and ensure that they attach the proper documentation.

Note: For Security Incidents, ASOs must create a new Incident ticket, and select AMB Security Incidents from the Summary drop down field.

For Access Requests, ASOs Must:

1. Select Request Items: Submit a Request from the NFC BSM ServiceNow CSP home page.
2. Select the Operations and Security Center category to open that specific list of tickets.

![Figure 12: Service Catalog for ASOs](image-url)
3. Select **System Access**.

4. Identify, under System Access, whether it is to:
   
   - Create
   - Modify
   - Delete

Note: ASOs are not able to make changes to their own access. If the ASO must have their own access updated, another ASO must submit the changes.

Documentation for these requests is available on the NFC [https://www.nfc.usda.gov/](https://www.nfc.usda.gov/) website. Contacting nfc.aso@nfc.usda.gov would provide further information and answers to any security related questions.

**Service Personnel Officials (SPO)**

As a Service Personnel Official, it is the SPO’s responsibility to submit HR/Payroll Services Requests.

**To Submit Requests:**

1. Select **Request Items: Submit a Request** from the NFC BSM ServiceNow CSP home page.

2. Select the **HR/Payroll Services** category to open that specific list of tickets.

![Service Catalog for SPOs](image)

*Figure 13: Service Catalog for SPOs*

3. Select which type of request to submit.
Benefits Processing Officials (BPO)

As a Benefits Processing Official, it is the BPO’s responsibility to submit FEHB, TSP, and International Organization Requests.

To Submit Requests:

1. Select **Request Items: Submit a Request** from the NFC BSM ServiceNow CSP home page.
2. Select the **Benefits Processing - FEHB/TSP/Intl' Org** category to open that specific list of tickets.
3. Select which type of request ticket to submit. Each link provides a list of relevant tickets.

**Direct Premium Remittance Web (DPRW), Tribal Benefits Official (TBO), and Tribal Security Official (TSO)**

For the insurance and tribal authorized users, it is the user’s responsibility to attach completed paperwork. Direct Premium Remittance Web (DPRW) users may submit security access/update requests by following these steps:

1. Select **Request Items: Submit a Request** from the NFC BSM ServiceNow CSP home page.
2. Select the **Insurance Services - DPRS/CLER/TIPS** category to open that specific list of tickets.
3. Select **Security Access/Updates**

The user may have to go to a second page of ticket choices in order to find the correct request type.

TBO users may submit Service Requests by following these steps:

1. Select **Request Items: Submit a Request** from the NFC BSM ServiceNow CSP home page.

2. Select the **Insurance Services - DPRS/CLER/TIPS** category to open that specific list of tickets.

3. Select which type of request ticket.

TSO users should submit Incident and Service Requests in a similar fashion to ASOs.

**Submission of a Ticket**

Prior to a ticket being submitted, it must be determined if the ticket is an Incident or a Service Request. If a user is unsure about which type of ticket to submit, the user can search through the available Service Request options prior to submitting an Incident. Also, please see the differences between the two ticket types in *Chapter 1 - Introduction - Overview of Customer Service Portal View* (on page 1) and the definitions in *Appendix A - Definitions* (on page 23).

For all authorized users, providing as much detail as possible in the ticket submission allows for expeditious processing. If a field on the Incident or Service Request ticket has an asterisk (*), it is a required field. When the user has provided the required information, the asterisk is grayed out.

Note: For tickets noting an error message, providing a screen print of the message also provides critical information.

**To Submit an Incident:**

1. From the NFC BSM ServiceNow CSP home page, select **Report an Issue: Submit an Incident**.

The new Incident record is displayed. The user’s contact information will pre-populate the fields.
2. Select the dropdown next to Summary.

3. Select a value.

4. Enter a full description of the incident in the Details field.

5. Select the Urgency dropdown.

6. Select a value.

7. Select the Submit button.
If an Incident requires documentation, before step seven identified for the new Incident creation, follow these steps.

1. Select **Add Attachments** on the Incident Record page.

   The message with a reminder that attachments should not include PII appears. If an attachment includes PII, the user must encrypt the document prior to attaching it to the ticket.

   ![Figure 17: PII Warning Page](image)

   **Figure 17: PII Warning Page**

2. Select the **OK** button. A window will appear accessing the user's files.

   ![Figure 18: View of Attachment after Selection](image)

   **Figure 18: View of Attachment after Selection**

3. Scroll through the available files to identify the correct documentation to attach.

4. Select the **Open** button. The file will become visible at the bottom of the ticket page.
To Submit a Request:

1. From the NFC BSM ServiceNow CSP home page, select the **Request Items: Submit a Request** option.

2. Select the appropriate Service Catalog based on the type of ticket the user needs to submit.
   
   Based on user access, multiple options may be displayed.
   
   Note: In some of the categories, the user must select the plus sign to open further sub-categories in order to find the desired ticket type.

3. From the list of ticket types, select the most relevant ticket type (Sample of a blank new ticket is displayed).

   Depending on the type of ticket, some information may be prepopulated.

   ![Figure 19: Request for a Name/Address Change](image)

4. Select the **Yes** or select the **No** from the dropdown menu for the Are you submitting this request on behalf of someone else? See the definitions in *Appendix A - Definitions* (on page 23) for guidance on the answer.

5. Enter the Additional Information with details concerning the Request, and any other fields needed.

6. Select the **Submit** button.
If a Service Request requires documentation, before step six identified above for the new Request creation, follow these steps.

1. Select *Add Attachments* on the Request record page.

   The message with a reminder that attachments should not include PII appears. If an attachment includes PII, the user must encrypt the document prior to attaching it to the ticket.

   ![Figure 20: PII Warning Page](image)

2. Select the *OK* button. A window will appear accessing the user's files.

   ![Figure 21: View of Attachment after Selection](image)

3. Scroll through the available files to identify the correct documentation to attach.

4. Select the *Open* button. The file will become visible at the bottom of the ticket page.
Chapter 5 - Contact Us

For NFC BSM ServiceNow functionality assistance for submitting a ticket, workflow issues, or Passwords, contact the Operational Security Center at 1-800-767-9641 or open an Incident.

Service Request or Incident needing escalation, guidance is available on the NFC https://www.nfc.usda.gov/ website and enter the word escalation into the Search field and pressing Enter.
Appendix A - Definitions

The NFC BSM ServiceNow CSP application gives authorized users the access to view several functionalities that allow submission and tracking of work tickets that may require action. Below are key words and phrases within NFC BSM ServiceNow that users should understand.

**Active=True/False Screen Field**

This is a cumulative State description, also referred to as Open and Closed. When viewing the statuses of tickets, Active=True or Active=False will be displayed near the top left corner.

- Active=True identifies tickets that are currently open, though each ticket could be in a different state.
- Active=False identifies tickets that have been completed and are waiting closure or have already successfully closed.

**Are you submitting this request on behalf of someone else?**

This drop down (on Requests) allows the authorized user to submit a ticket on someone else’s behalf. This helps identify the person whose account is in need of adjustment.

**Catalog or Service Catalog**

The Catalog is the organization of the data in the CSP. It displays links to access the Knowledge Base, to submit tickets, and to review both open and completed tickets.

**Change Request**

A Change Request, identified as a ticket number starting with CHG, is a planning ticket that records approval and work completed when an application or workflow requires adjustment.

**Incident/Issue**

An Incident ticket, identified as a ticket number starting with INC, is an event causing or may cause a disruption to the quality of services and customer productivity. An example would be an application not being available.

**Knowledge Base or Knowledge Database**

This is a compilation of articles written to support repeating issues and requests. Authorized users are encouraged to search the Knowledge Base prior to submission of a ticket. If an answer or guidance is not available in the Knowledge Base, users are encouraged to submit a ticket for support.
Request or Service Request

A Request, identified as a ticket number starting with **REQ**, is a standard work order, such as requesting access to an application or requesting a correction to a retirement fund.

**State**

The State is the current standing of the ticket. Examples would be **New, Awaiting Information, Resolved** or **Complete**, and **Closed**.

**Status**

The status of a ticket displays (for the applicable tickets) the viewable work activity that is available on a ticket.
Appendix B - Frequently Asked Questions

How do I dispute a ticket?

When a ticket moves to either Resolved or Completed (for the Incident and Request respectively), the user will receive an email notifying them. To dispute a ticket’s completion, the customer must either call their supporting contact center, or select the Dispute button on the completed ticket. The Dispute button is not available on tickets that have moved to a Closed state. If a user must dispute a Closed ticket, they must call their relevant call center.

How do I request access roles?

ASOs submit all Access Requests, including access to NFC BSM ServiceNow. Guidance is available in the ASO section of Chapter 4 - Navigation (on page 13), or by contacting nfc.aso@nfc.usda.gov.

How do I attach documents and send password?

Directions for attaching documents are available in the Submission of a Ticket section of Chapter 4 - Navigation (on page 13). For documents requiring encryption and password protection, send an email with the ticket number and password to the relevant contact center.

How do I send requests for enhancements?

NFC BSM ServiceNow is a growing application. If a user identifies an enhancement that would assist in the submission or review of tickets, please send an email to the OSC at OSC.ETix@nfc.usda.gov.

What time zone is used?

The NFC is located in the Central time zone (CT); therefore, all date/times are in the CT. Hours of operation for the contact centers are available at NFC https://www.nfc.usda.gov/.
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