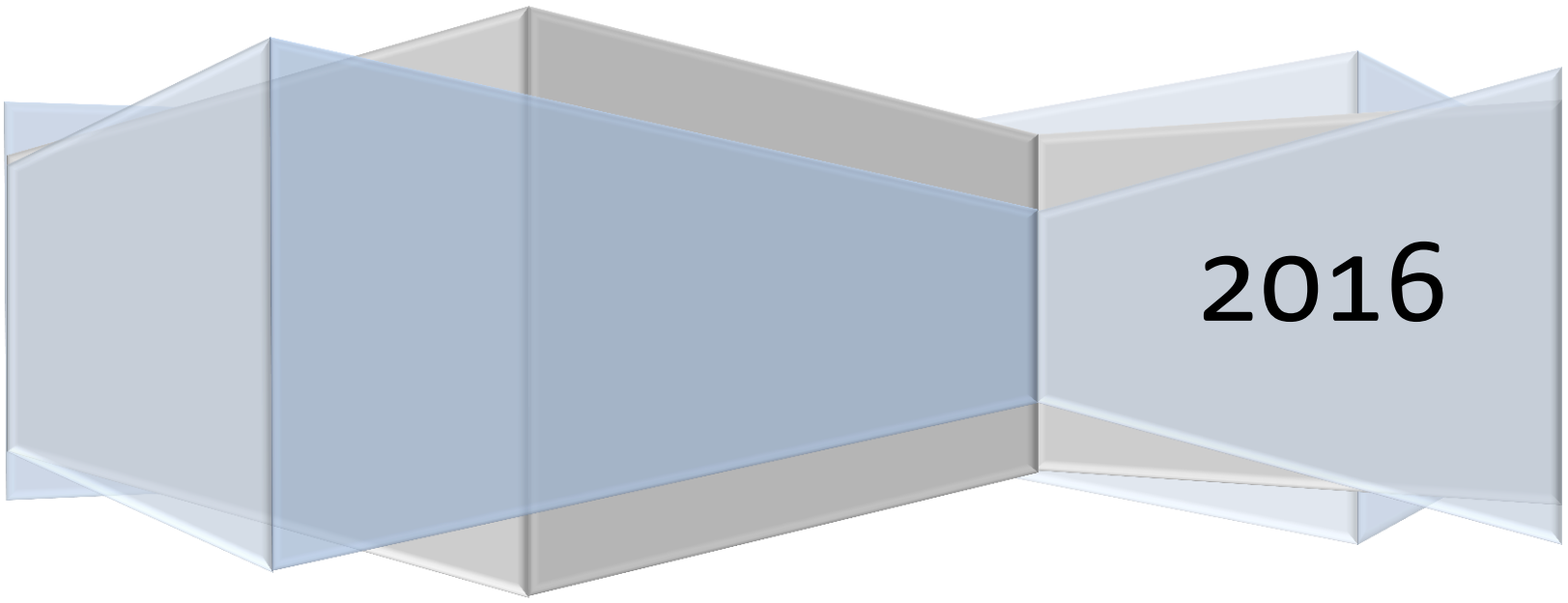
State of Delaware

DTI Managed Docs

ServiceNow

DTI Enterprise Architecture



MANAGED DOCUMENTS

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Managed Document Features

Managed Documents is used to store electronic copies of technical documents that are associated with a Configuration Item, CI, in ServiceNow. Managed Document functions include creating a definition for a document, and listing the current documents for a user. With My Collections, a user can set up customized lists of documents.

To add a document to Managed Documents, create the definition and complete the fields for the document: name, owner, owning group, and the roles-- the reviewers, and the user permissions.

Access to documents is controlled using the roles and user permissions. For example, a document for an application CI could have the reviewer role assigned to the primary and secondary resources for the application; and user permissions should be added for the primary and secondary, giving editor permissions. So a document defined for an application can be viewed and edited only by the primary and secondary resources for the application.

The next section describes roles and the fields to define to control access to a document with the following sections stepping the user through adding and viewing documents in Managed Documents.

Automatic emails are sent to reviewers and approvers of a document when it is updated in ServiceNow. Using the links in the email, reviewers can navigate to the document for review; and select the appropriate link in the email to approve or reject the document. Reviewers and Approvers are notified of updates to a document in ServiceNow, SN, via email.

For more information on managed docs view the SN website at:
https://docs.servicenow.com/search?q=managed+docs

Roles

To control access to a document, define roles when creating the document. The roles are fields that list users who will have access, and limit their actions to read only, edit, or owner permissions.

Requested by – Person submitting the document request.

Owner – Document Primary Resource, usually the Primary Support Person, PSP, for the application. Same permissions as the user permission = “owner”.

Owning group – Assignment group.

Reviewers – Users responsible for approving the technical content of the document; usually the PSP and Secondary Support Person, SSP, for the document.

User Permissions – Users can be given the role of reader, editor or owner for the document; usually the PSP, SSP and Vendor Manager.

Approvers – This field is not selectable. Approvers are defined for each group that will have final approval after the document draft has been reviewed.

Roles example

Here is an example of the roles defined for a document associated with the Elections Management System, EMS.

Requested by – Timothy Darcy (PSP)

Owner – Timothy Darcy (PSP)

Owning group – Apps Delivery – DTI Mainframe

Reviewers – Timothy Darcy, Zinnia Tolosa (PSP and SSP)

User Permissions – Tim, Zinnia and Rebecca; Editor Permission (PSP, SSP, and VM)

Approvers – Karlene and Rebecca (Manager and VM)

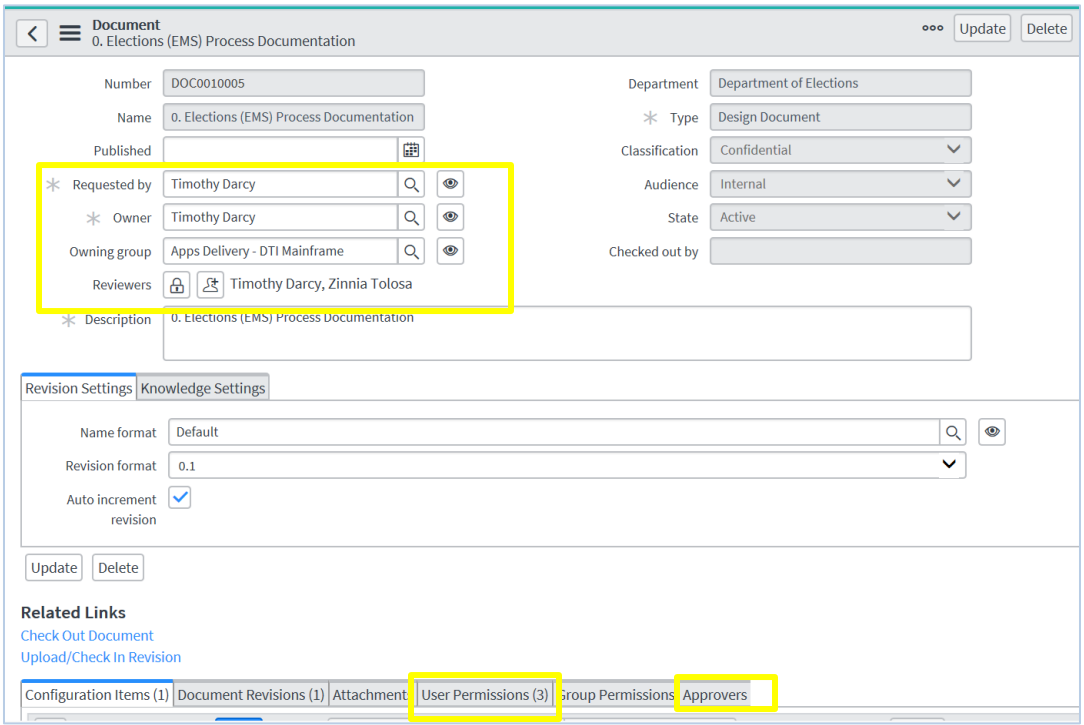

Figure 1 - Example of roles defined for the Elections Management System (EMS).

Create a Managed Document

1. Create a managed document by selecting Managed Documents off the left column Navigator, *Managed Documents* ➔*Create New*.

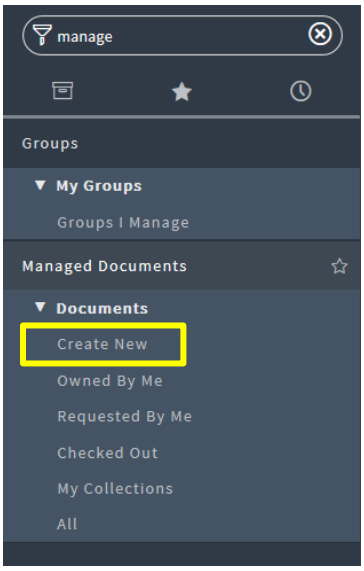

Figure 2 Managed Documents menu.

2. Define the fields associated with roles as discussed in a previous section, along with the following fields. The fields with a red asterisk (*) are required by SN, the remaining fields are required by your organization.

   Name – Provide a Title/Name of the managed document you are creating.

   Published – This field is optional. Define a date of publication.

   Department – Business Owner assigned in ServiceNow for the application – for Elections, the Department = Department of Elections**.**

   Type – Select the type of document – there are eleven (11) document types to choose from.

   Classification – This is the classification of the document you are attaching – public, restricted or confidential.

   Audience – Internal /External, that is internal or external to the organization.

   Description – Insert a meaningful description of the document

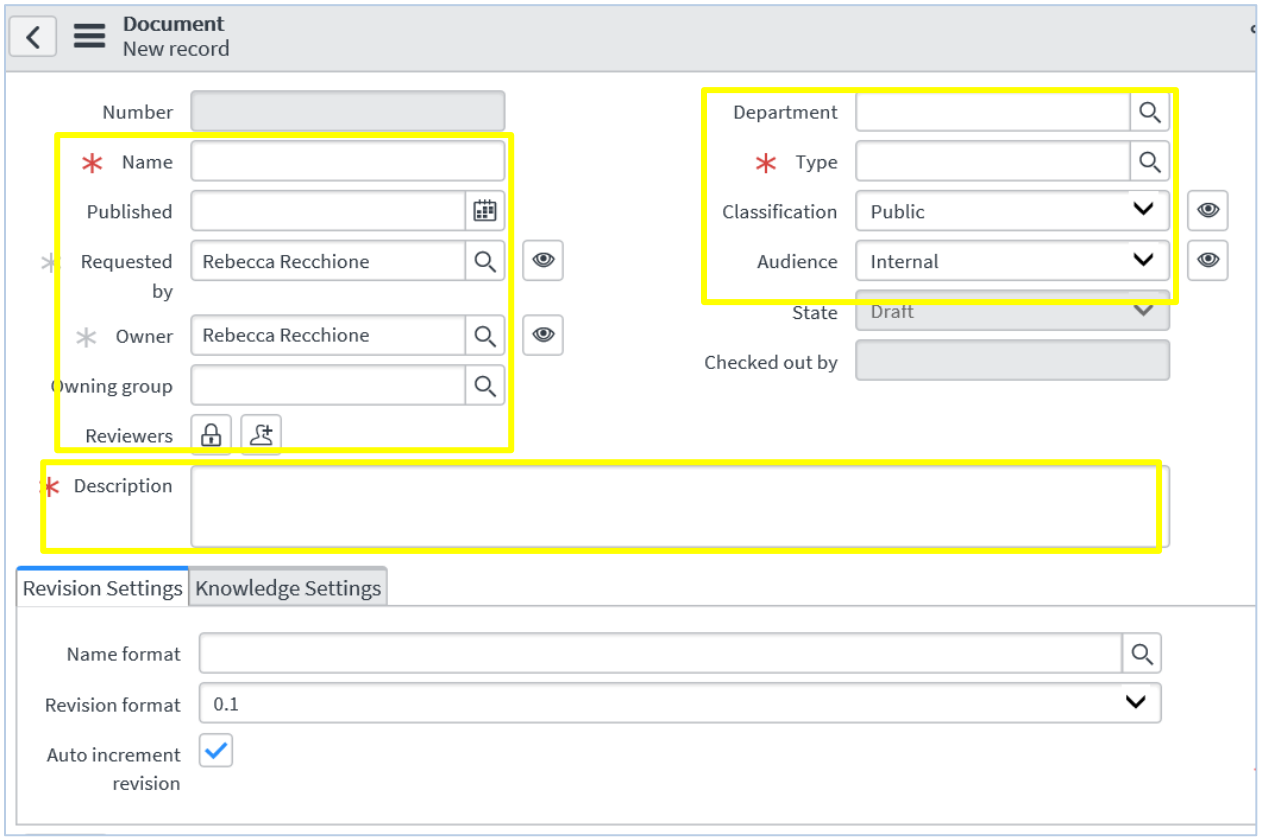

Figure 3 Create a new Managed Document record.

Selecting Reviewers

3. To select technical reviewers for the document, there are several methods. To select yourself, click on the person icon to the right of the "Lock" icon.

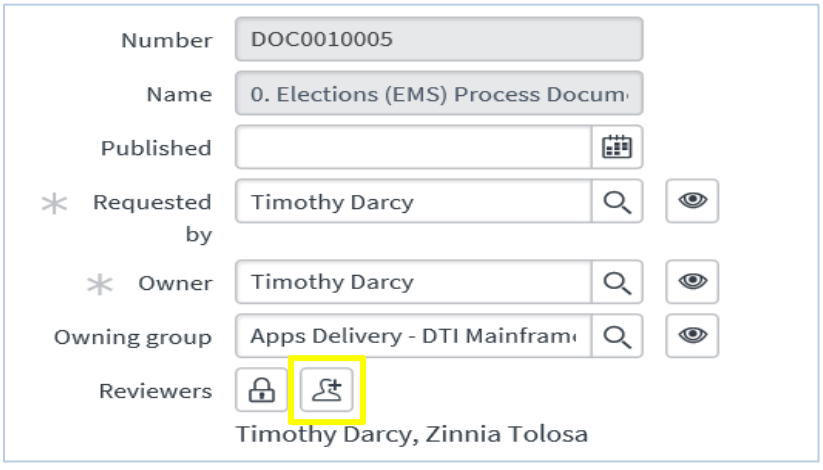

Figure 4 Select yourself as a reviewer.

4. To select another person as a technical reviewer, first click on the “Lock” icon.

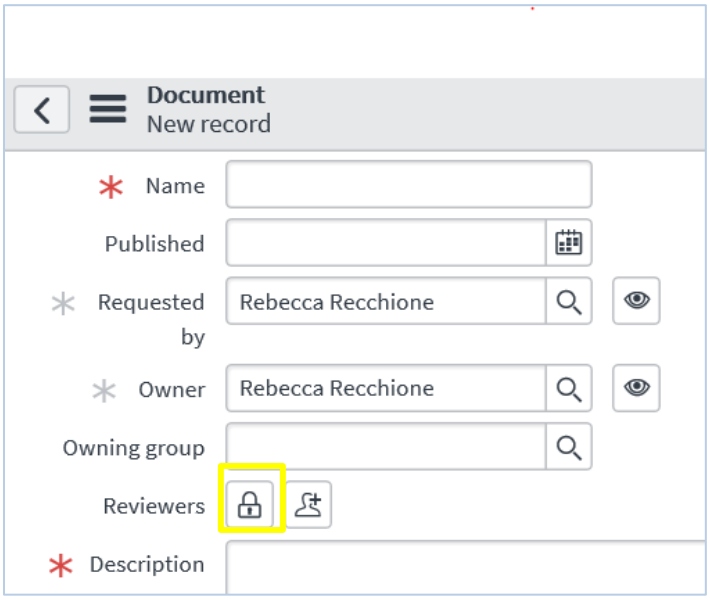

Figure 5 Select other users as reviewers.

5. Then you can do one of the following:

   i. Type in the person’s name (in the field next to the magnifying glass), and select the magnifying glass.
   ii. Select the magnifying glass, and then select one of the names on the list.

iii. Or you can enter an email address in the field next to the envelope icon.

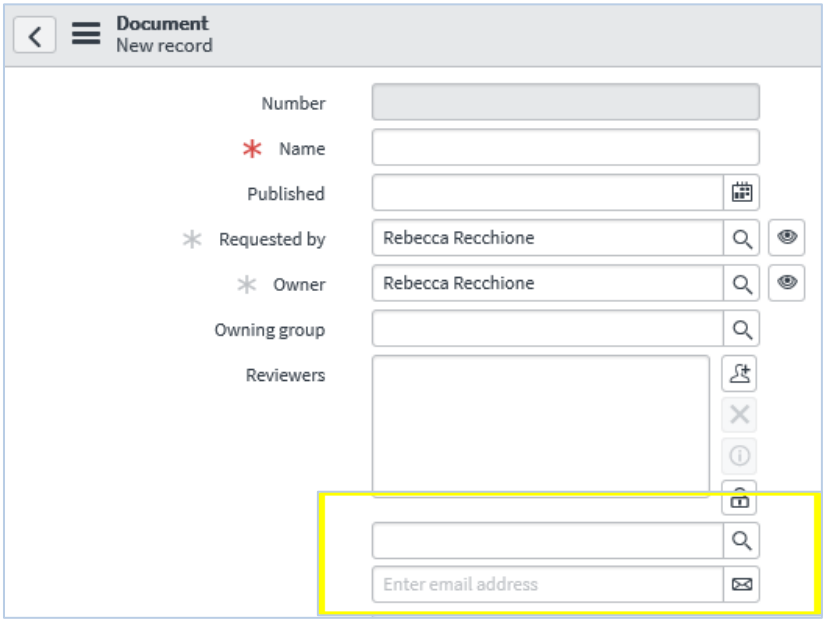

Figure 6 Select a name or type in an email address to assign a reviewer.

6. Click on the "Submit" button.

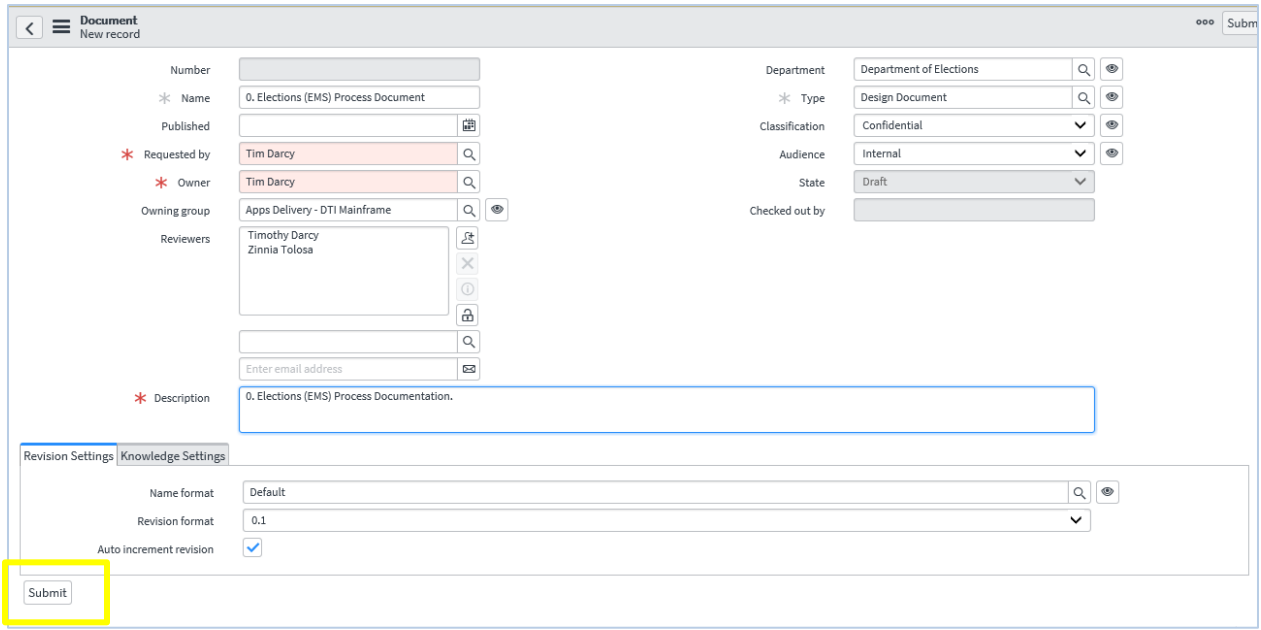

Figure 7 Click Submit to create a new managed document record.

7. Select your document from the list and verify the reviewers that are listed.

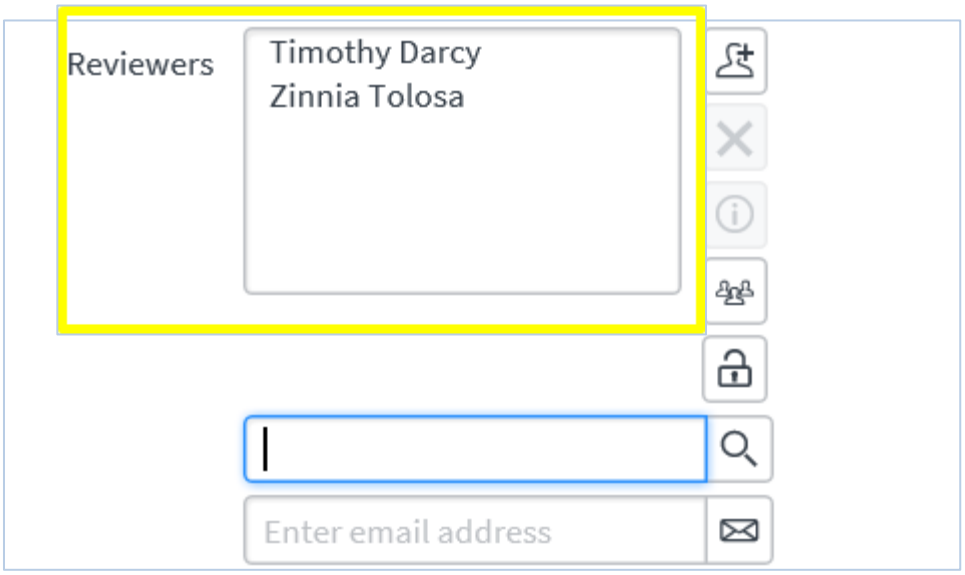

Figure 8 Example showing assigned reviewers for a document.

Associate the Document with a Configuration Item

8. Associate the document with a Configuration Item, CI, by clicking on the "Edit" button on the *Configuration Item*s tab.

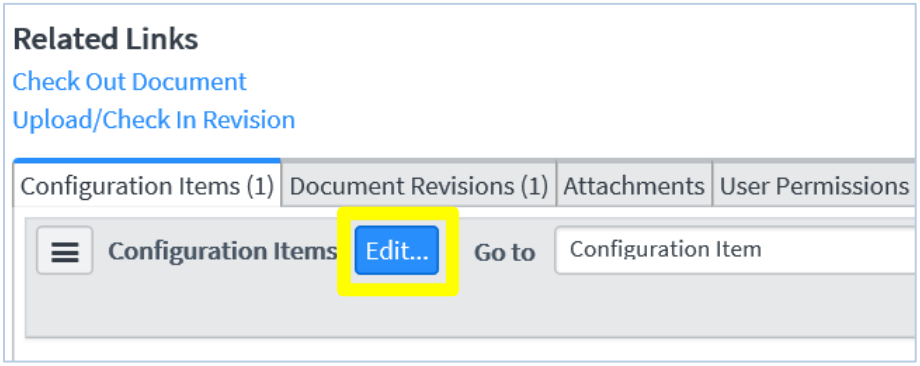

Figure 9 Associate a Configuration Item, CI, to a document.

9. Search for the CI by typing the name in the *Collection* search; select the CI you want, click on the ">" or double click the CI; the CI will move from the box on the left to the box on the right.

When multiple CIs are listed with the same name usually the application and the business systems have the same name. Select the application CI below by ensuring the additional information shown below the boxes show the primary and secondary support person.

Click on the "Save" button.

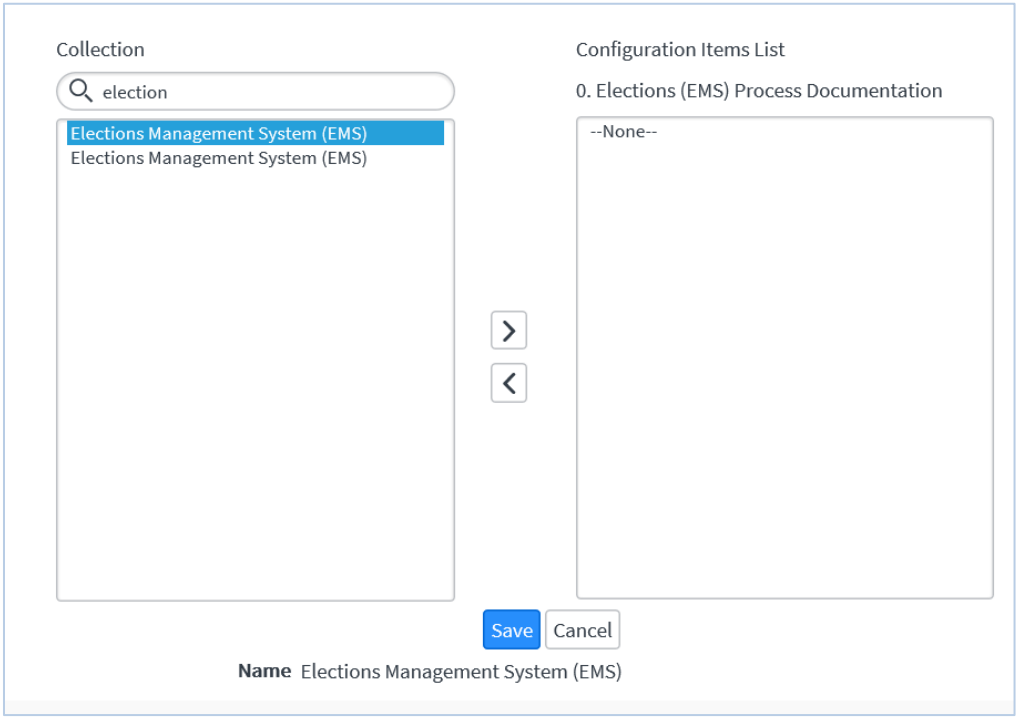

Figure 10 Select a Configuration Item, CI.

10. The Configuration Items tab now indicates that there is an association with a CI; that is the tab name is followed by "(1)". Also, the associated CI(s) are listed on the tab.

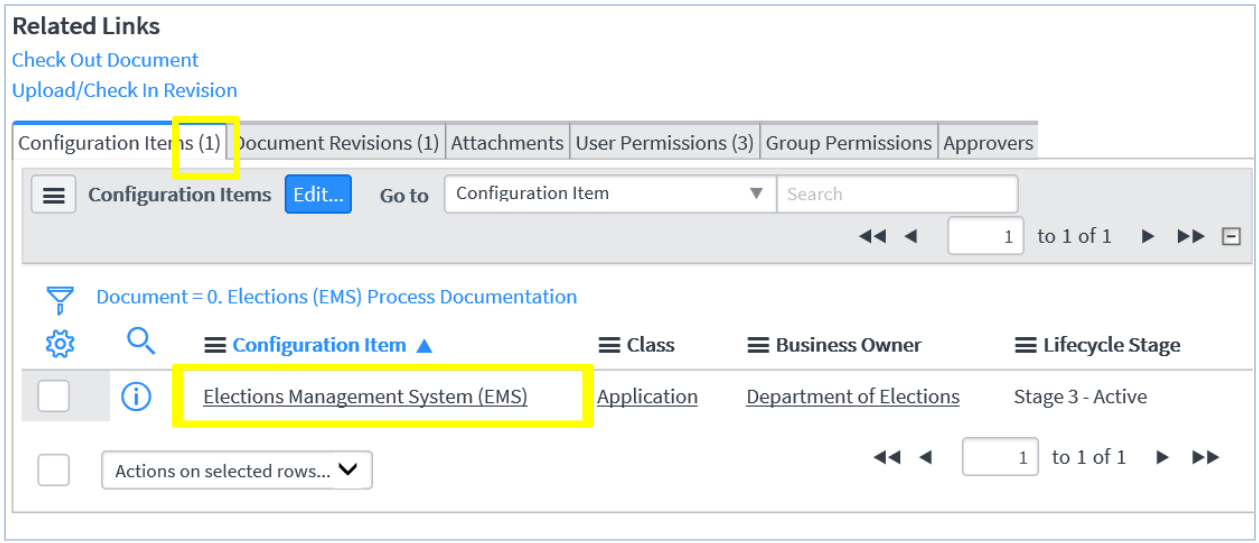

Figure 11 Managed document record showing the assigned CI Elections Management System (EMS) on the CI tab.

11. Upload the document by selecting *Upload/Check In Revision* under *Related Links.*

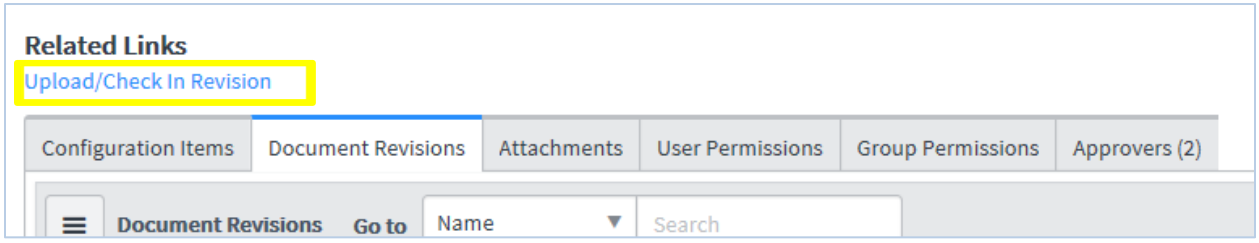

Figure 12 Upload/Check in Revision

Select a Document

12. Select the document you want to upload by clicking the “Browse”/“Choose File” button; your document library will pop-up. Select the document you want to upload and click “Open” and click on “OK”. The document will now be displayed in the *Document Revisions* tab.

    Note that the Revision Number in this example is set to “.2”. Revision numbering defaults to

.1 increments; so every document revision will step up by .1.

Figure 13 Select a document to upload to managed documents.

13. Click on the Document Revisions tab and you will notice that the document is ready for review; the Stage = "Draft".

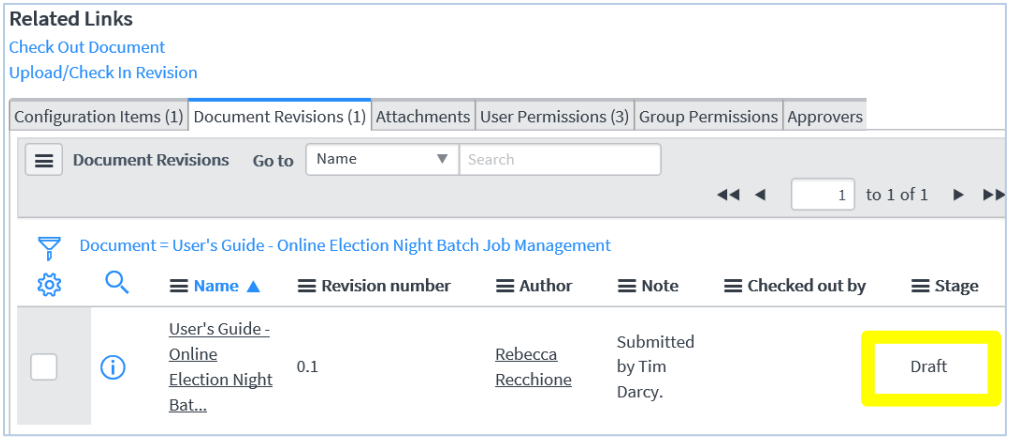

Figure 14 Tab Document Revisions showing revision 0.1 of a User's Guide.

Submitting a Revision for Review

After a document is added to a managed document record, the document should be submitted for review using the following steps. Note that emails will be automatically sent to the assigned reviewers, requesting a review to accept or reject the document. On acceptance of the review, an email is sent to the assigned approvers for the group. On approving the document, it can then be published.

14. Once the document is ready to be reviewed, submit the revision by right clicking on the document name in the tab *Document Revision.*

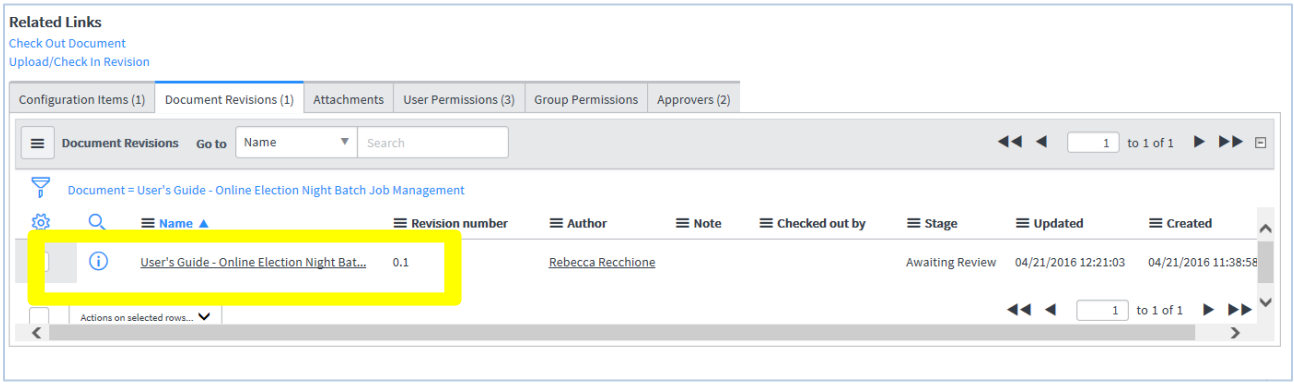

Figure 15 Submitting a draft document for review.

15. Select "Submit Revision". The Stage changes to "Awaiting Review".

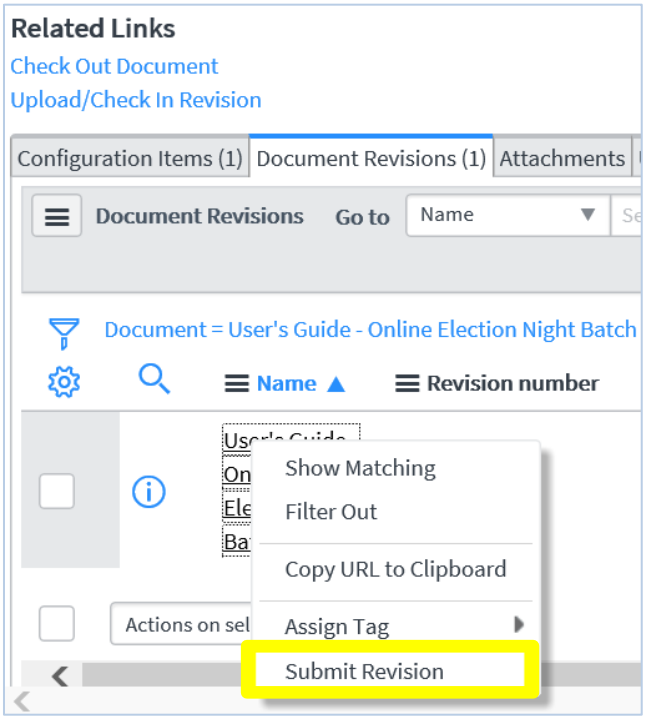

Figure 16 Submit a draft document revision for review.

16. Click on the document name in the tab *Document Revisions.* The Revision Approval screen lists the Reviewers/Approvers and the State = "Requested".

Figure 17 Review and approval of the managed document.

17. An email is sent to the assigned reviewers for the document, similar to Figure 18.
    i. Click on the link in the email to view the document revision.

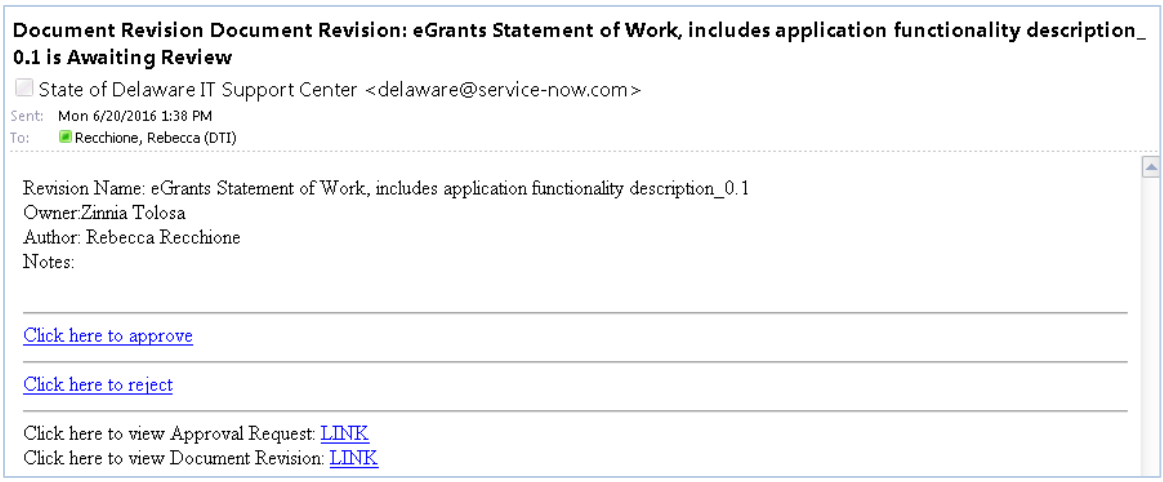

Figure 18 Example of an email that is sent to reviewers when a managed document is submitted for revision.

ii. Click on either the blue file name link at the top of the screen, or "[view]" next to the file name.

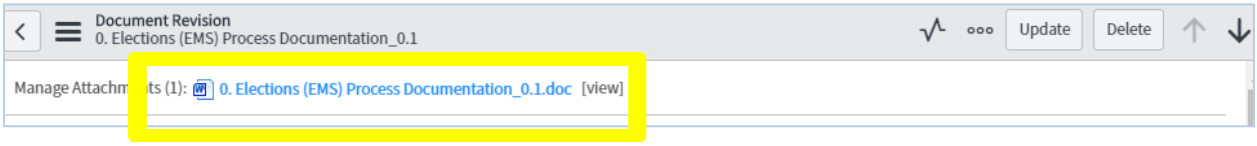

Figure 19 Click on the document link or "[view]" to view the document.

18. Once you are satisfied with the document, you need to approve the document revision and then approve for publishing using the following section.

Review and Approval of the Document

A document must be reviewed and then approved before it can be published. Approving a document is done in two stages:

(i) Approving the review.
(ii) Approving for Publishing.

19. Reviewers can grant revision approval using three different methods.
    i. Right clicking on "Requested" next to your name (you should still be in the Revision approvals screen), and selecting "Approve". The below screen will appear.

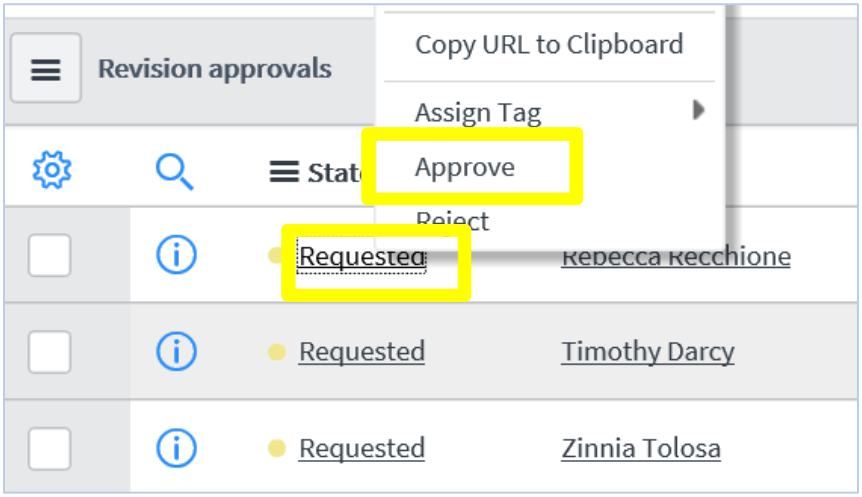

Figure 20 Reviewer gives revision approval, on the Document Revisions tab.

ii. A second way to approve your review, is to left click on "Requested" next to your name (you should still be in the Revision approvals screen). Using the "State" drop down,

select any of the following choices: Approved, Reject, Cancelled, or No Longer Required.

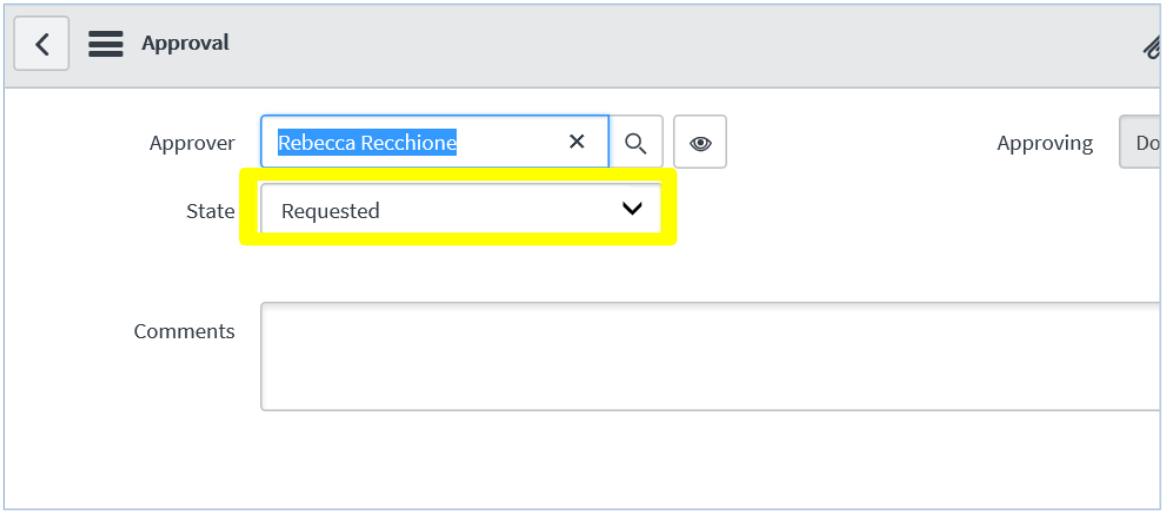

Figure 21 Alternate way for a reviewer to give revision approval, on the Approval screen.

iii. The third way to approve your review is in the email received that requests your review of the document. Select "Click here to view approval Request". See Figure 18 and 21.

20. After approving the revision, the state for the document is now shown as "Approved" on the *Revision approvals* screen. Note that two "Requested" for review are now shown as "No Longer Required" and the assigned users for approving for publishing are now the "Requested" state. See Figure 22 and 23.

Figure 22 Example showing the document revision has been approved by one of the three reviewers.

21. Approval for publishing is now needed as indicated in Figure 23, with State = "Requested" for the two assigned Approvers .

Figure 23 Example showing approval is requested of two assigned approvers.

22. To approve the document, use one of the three methods used to approve the document revision. See 19.i. – iii. The email Approval can be done in the same manner as Approval for Review by clicking on "Click here to to view approval Request ".

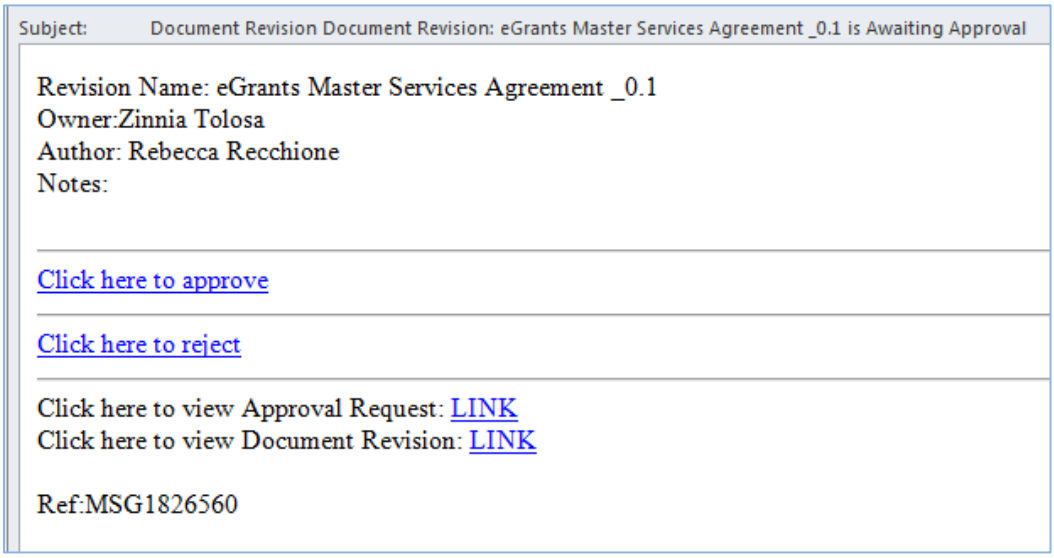

Figure 24 Example of an email that is sent to approvers when a managed document is submitted for approval.

23. After approving the document, the state changes to “Approved” on the *Document Revisions* tab. Note that the state for any other approver changes is “No Longer Required”.

Figure 25 Example of document revision approvals. One user was responsible for both the revision and approval.

Publish the Document

24. After the approve step, the "Publish Revision" button appears above *Related Links* as circled in yellow in the screenshot below.

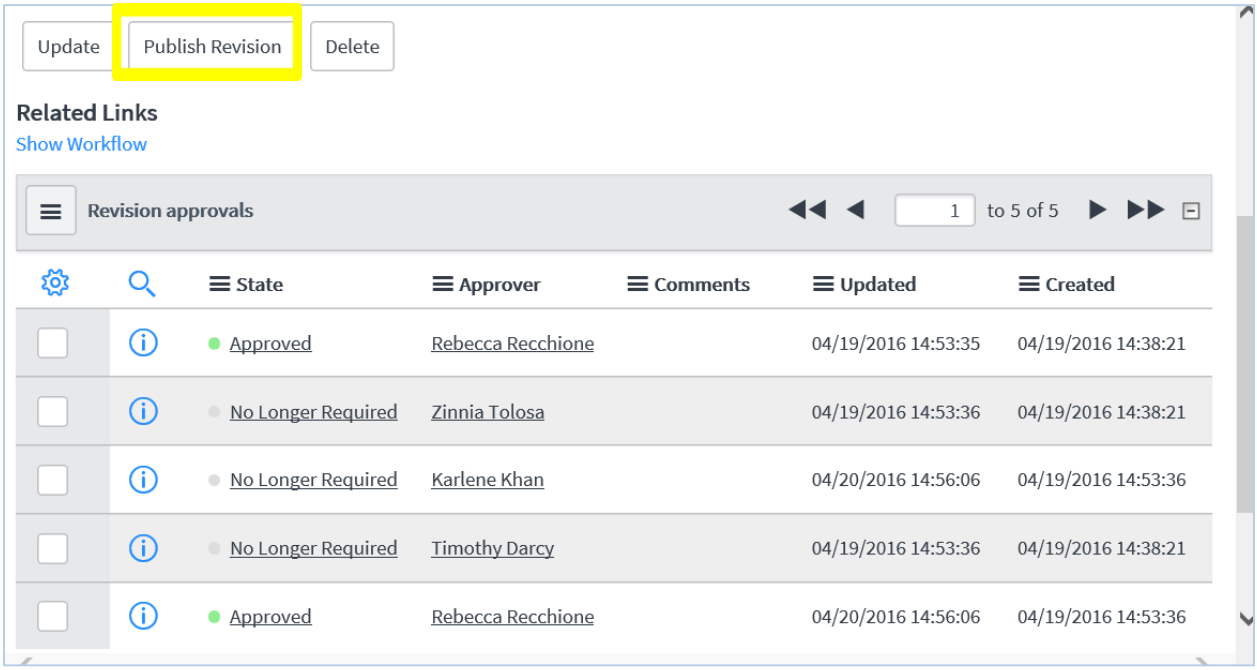

Figure 26 Example show the "Publish Revision" button active once the document revision is statused reviewed and approved.

25. To publish, click on the "Publish Revision" button. (Optional: You can change the document name to be more specific if needed.) Do not change the Revision number. Click on "Publish" on the pop-up screen.

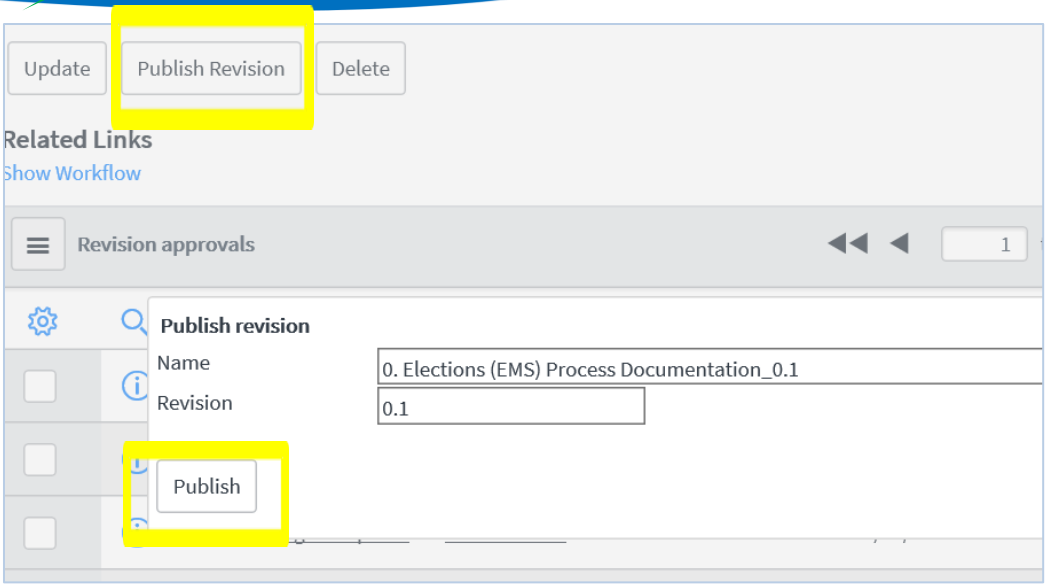

Figure 27 Example on steps to publish a managed document revision.

26. The document Stage shows "Published" on the tab *Document Revisions*.

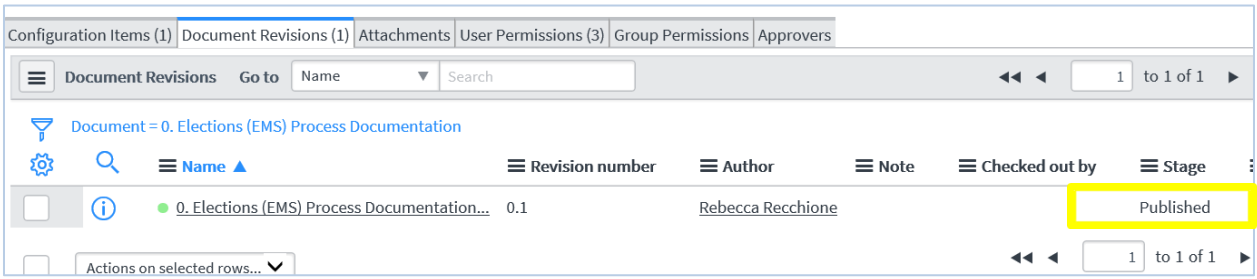

Figure 28 Example of a document stage indicating "Published".

Provide User Permissions

27. To grant user access to the managed doc, click the *User Permissions* tab, then click the "New" button.

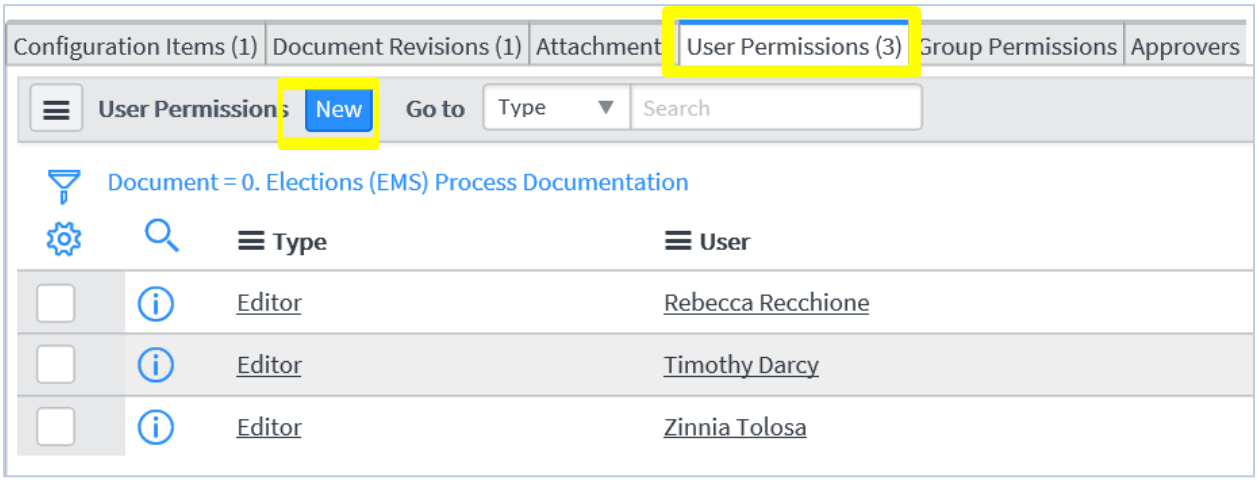

Figure 29 Use the "New" button on the User Permissions tab to add a user and set up user permissions.

28. On the user field, type in the name of the person you would like to give permissions. If you do not know how to spell the person's name, click the magnifying glass and you can use the ServiceNow search feature. On the type field, select the permission you want the person to have (Reader, Editor, Owner), then click the "submit" button. You will now see a number in the user permissions tab, representing the number of users who have permissions. Repeat steps 29 and 30 for all designated users.

    Note: To modify a user role, click on "Type" and amend the role accordingly.

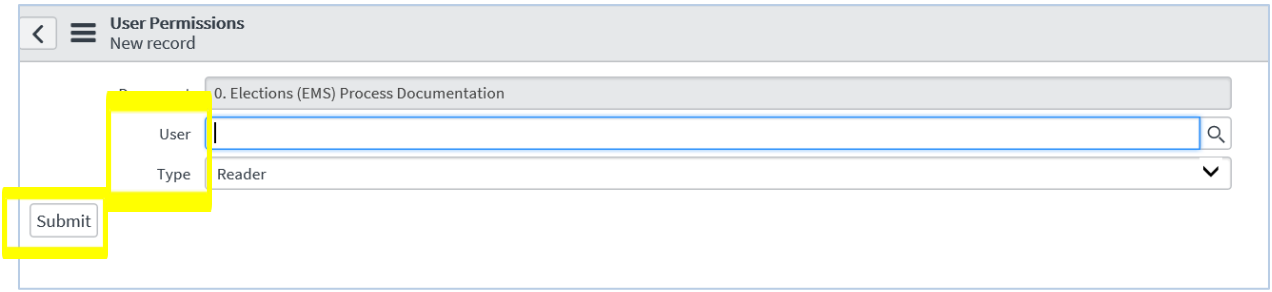

Figure 30 Define a user and type of user permissions for a managed document.

29. Verify the user permission list. In this example, the *User Permissions* tab shows the three defined users have "Editor " permission.

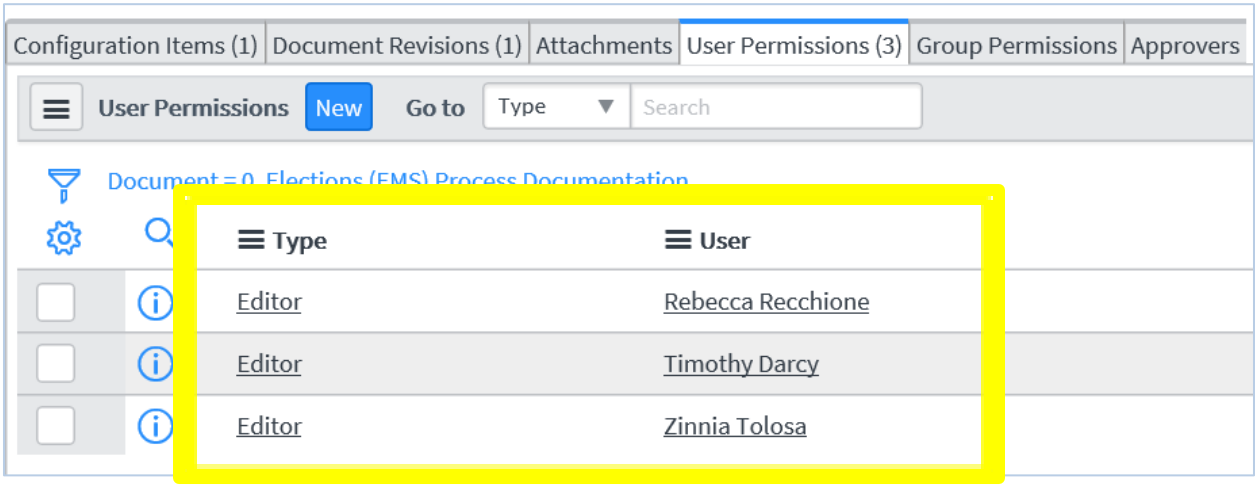

Figure 31 Example showing user permissions of type "Editor".

Viewing any Document

30. To view a document, from the left navigation column, under the heading *Managed Documents*, select "All" and a list of the documents you have access to will appear.

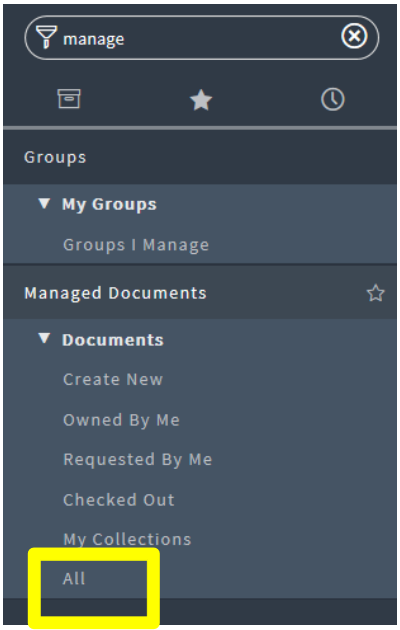

Figure 32 Managed Documents menu.

31. Select the document that you would like to view. See Figure 32.

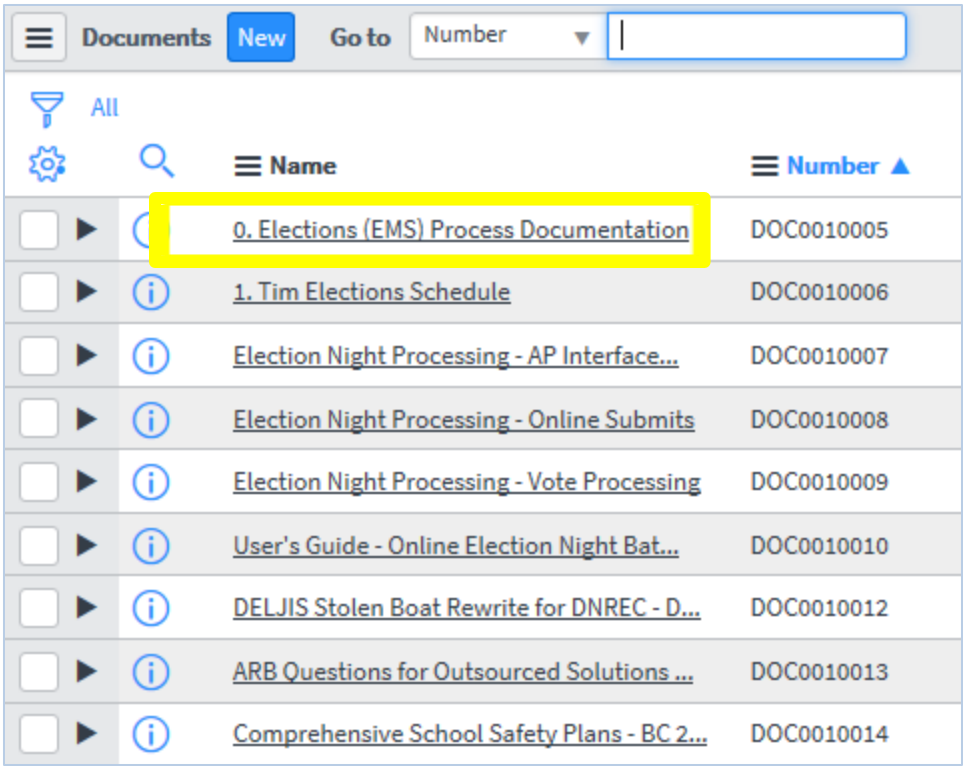

Figure 33 List of managed documents using the "All" off the Managed Documents menu.

32. Click on the document name in the *Document Revision* tab and then click on the file name link next to *Manage Attachments* located at the top of the screen.

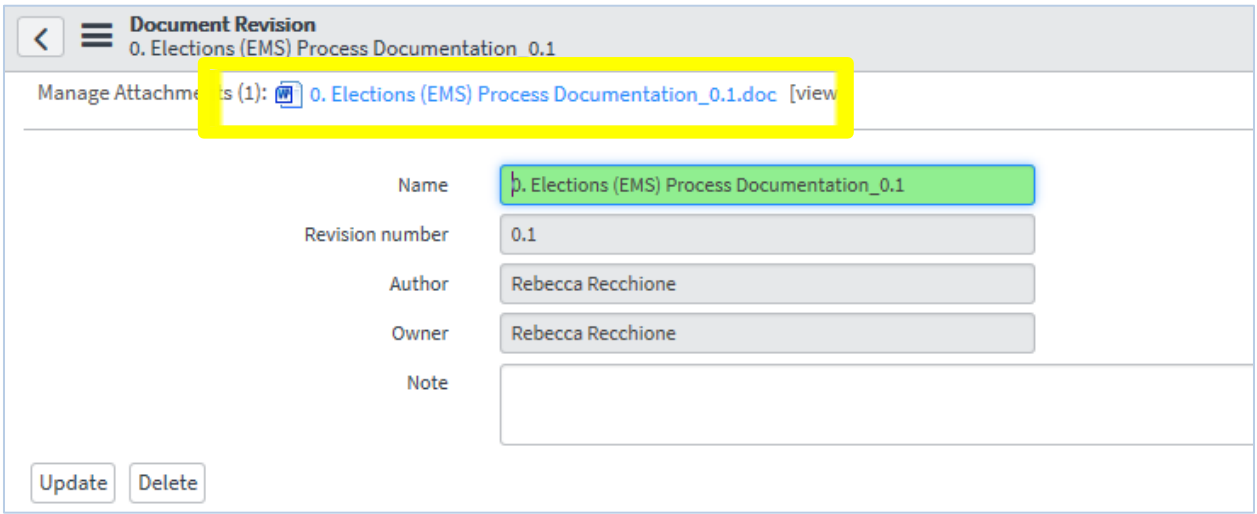

Figure 34 Click on the document link or "[view]" to review a document.

33. A second way to view documents is from the associated CI screen.
    i. From the CI screen, select the *Documents* tab. Select the document name you want to view.

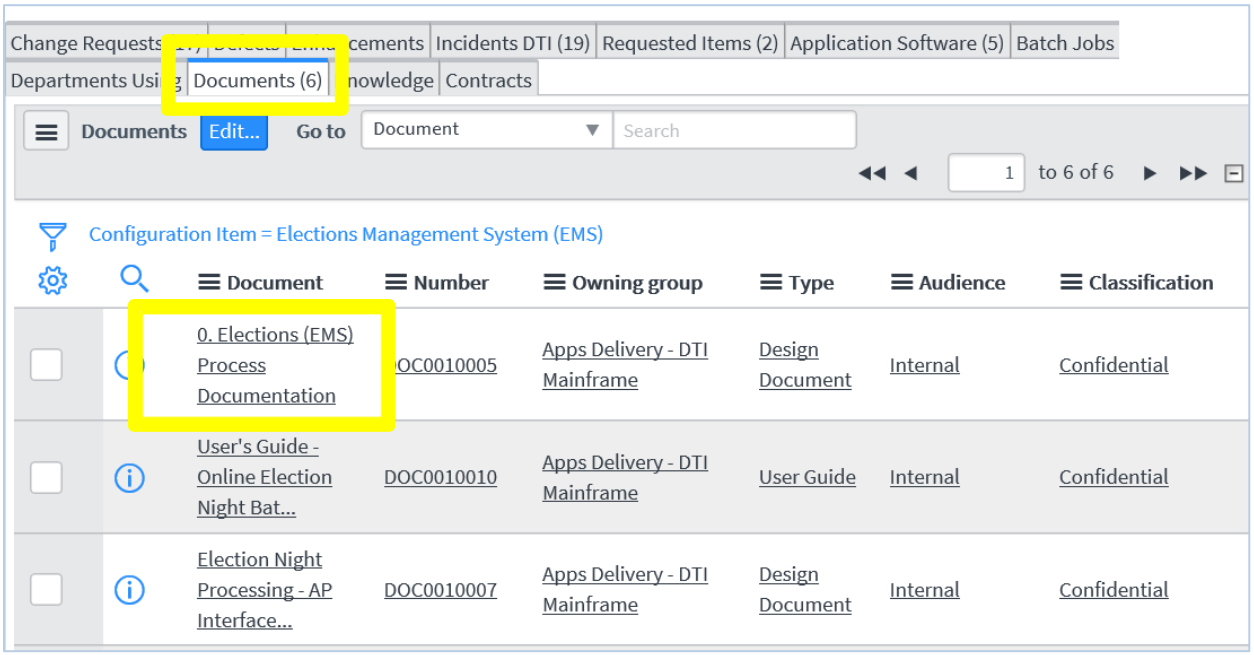

Figure 35 From a CI screen, select a managed document off the "Documents" tab.

ii. Select the Document Revision tab, and then click on the file name.

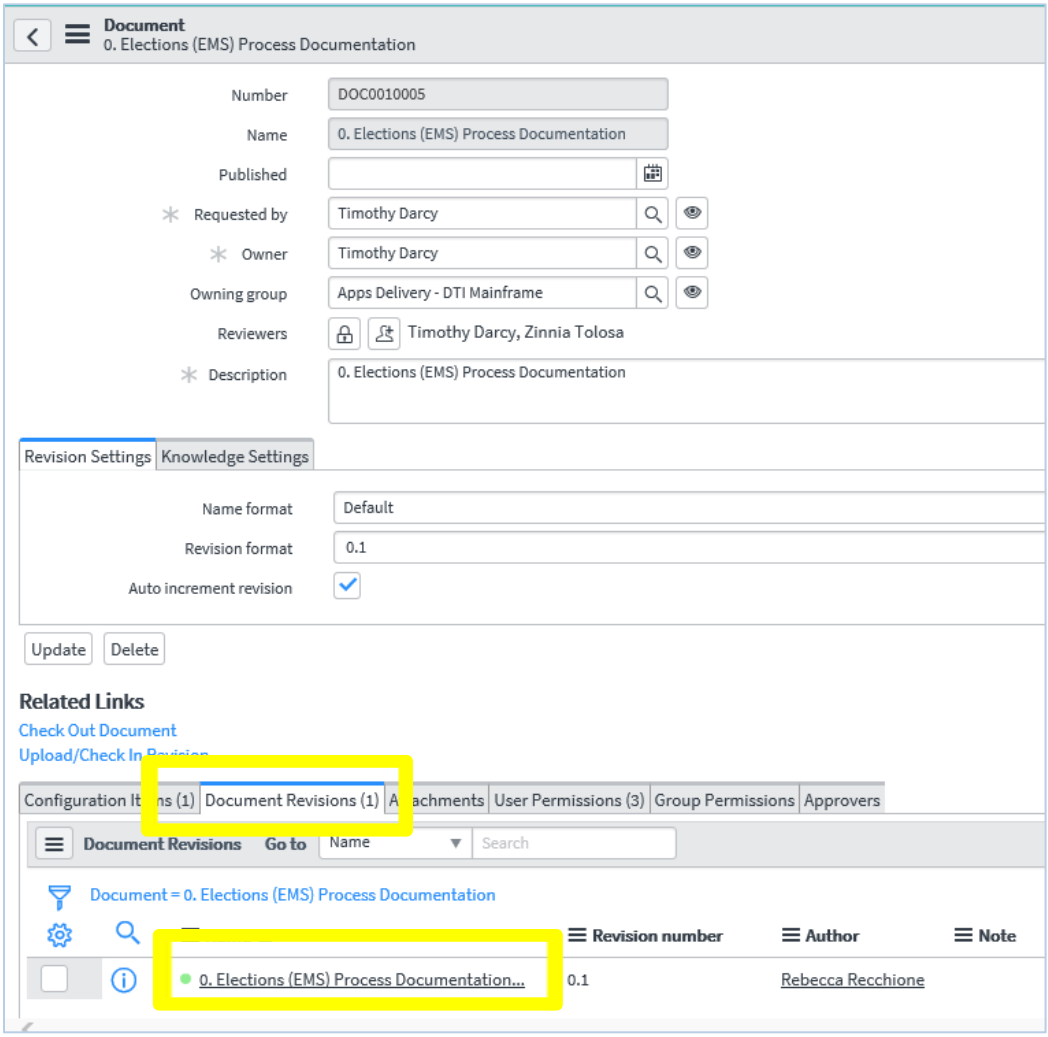

Figure 36 Select the document for review off the "Document Revisions" tab.

34. At the top of the screen you will see the filename link. Click on the word "view" to open the document or the file name link.

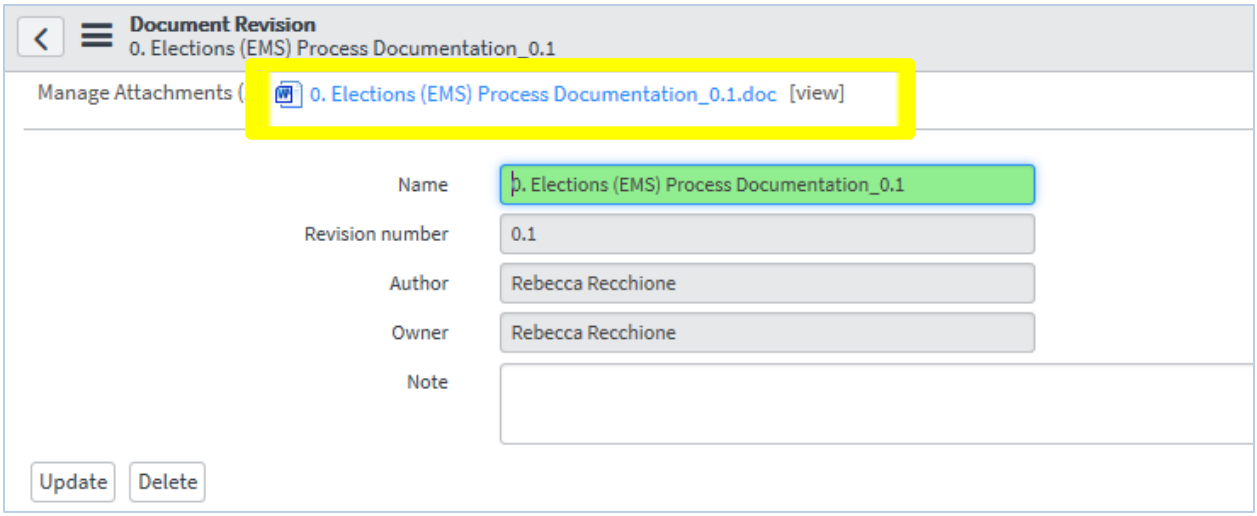

Figure 37 Click on the document link or "[view]" to review a document.

Check out a Document

Check out a document to make changes after it has been added to a managed document record. Checking documents in and out keeps a record of document changes and ensures that only one person at a time is editing the document.

35. Documents that have been published, may be checked out from the Document screen. Navigate to a document screen first. From the left navigation column, under the heading *Managed Documents*, select "All" and a list of the documents you have access to will appear.

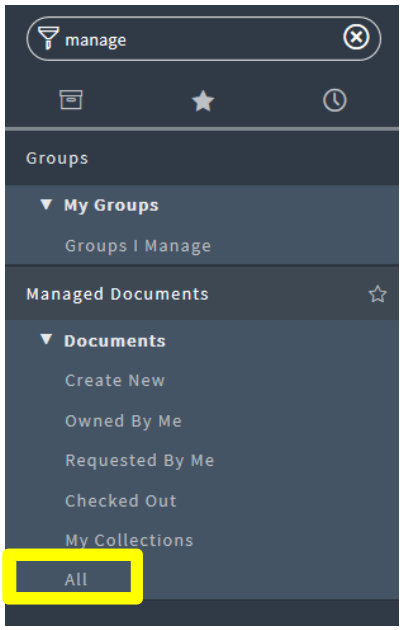

Figure 38 Managed Documents menu.

36. Select the document that you would like to check out. See Figure 38.

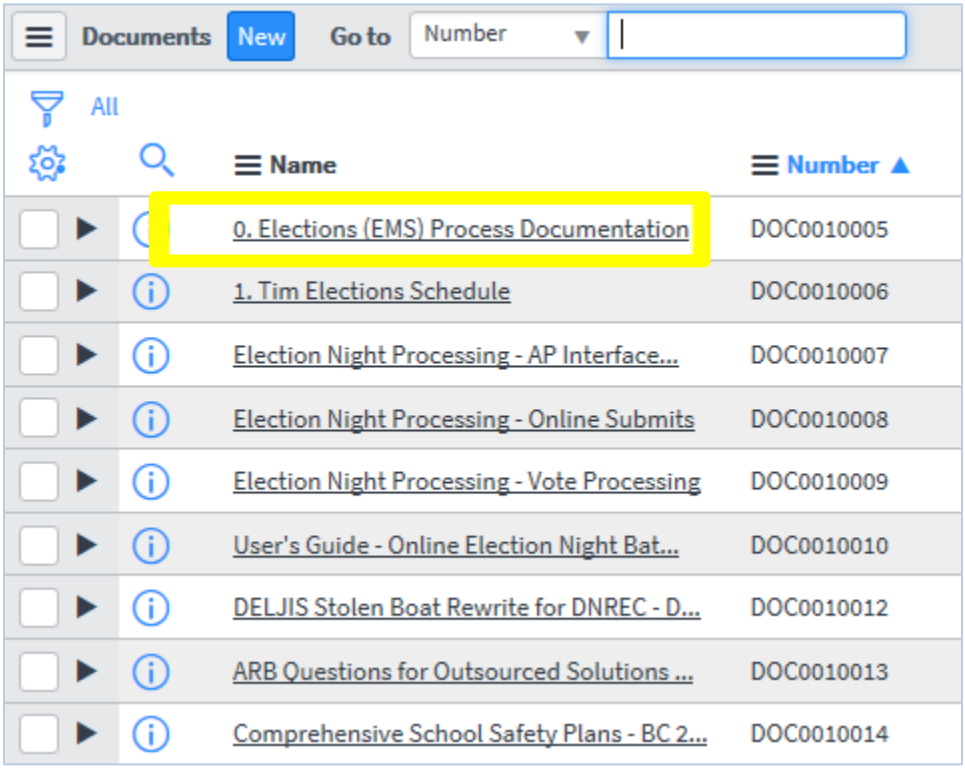

Figure 39 Select a document.

37. Click on the document name in the *Document Revision* tab.

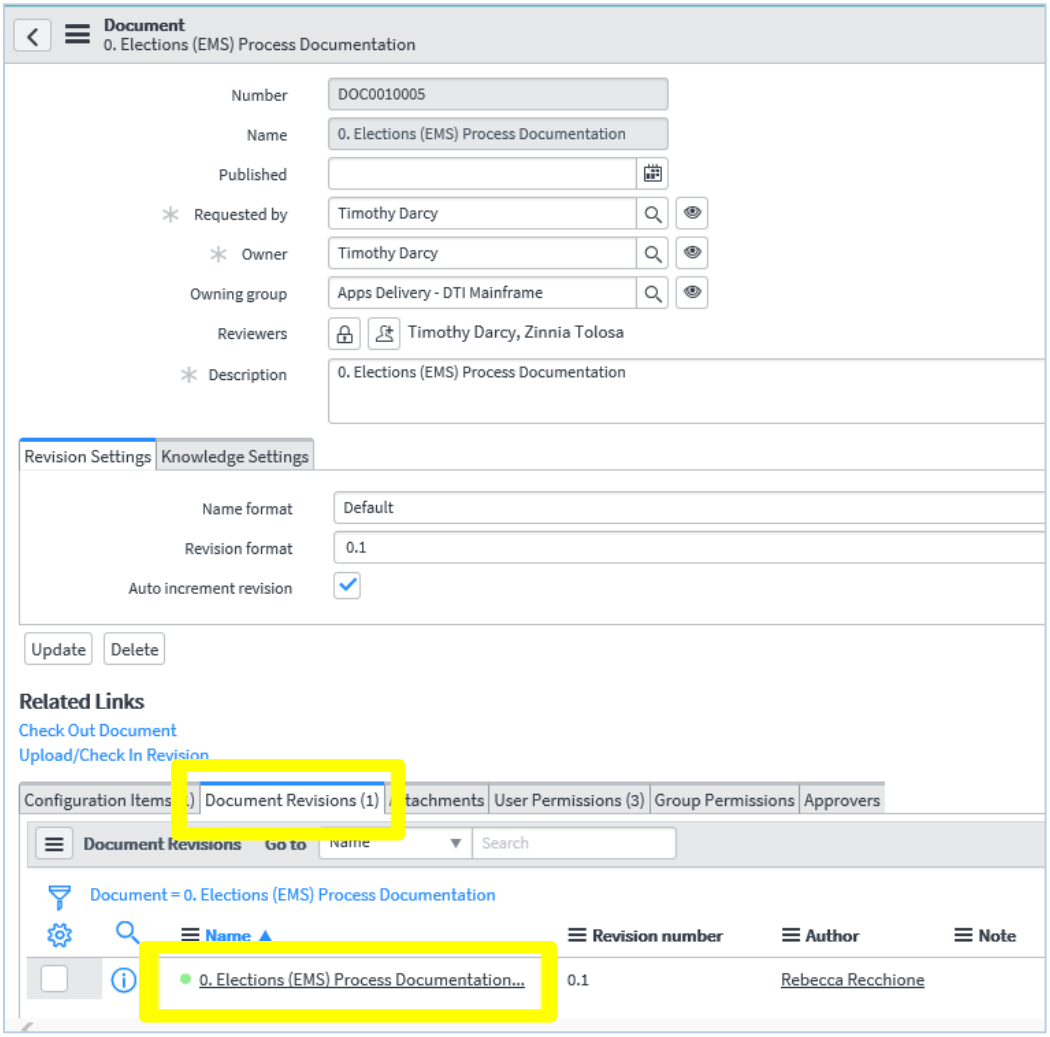

Figure 40 Select the document to check out, off the "Document Revisions" tab.

38. To check out a document, click on the "Check Out Document" link, in the Related Links section. A pop-up will appear, indicating the name of the document, the revision number, the created by person, last date modified, and the document type. After verifying the information, click on the "Check Out" button. Make the necessary amendments and upload back the document following steps 14 to 18.

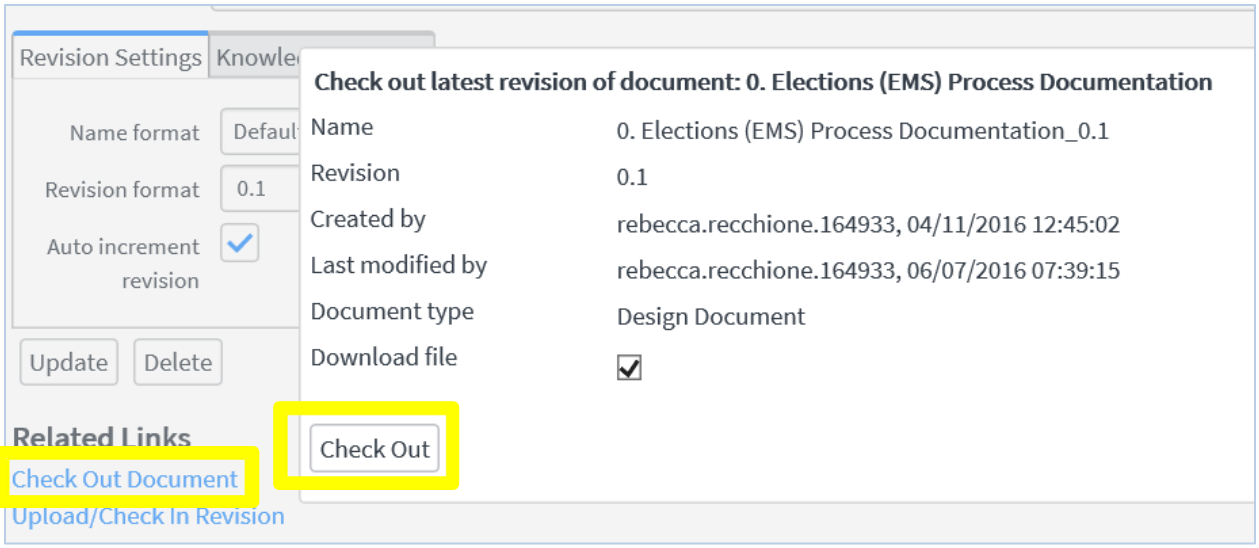

Figure 41 Example of a managed document screen indicating the "Check Out Document" link and the "Check Out" button.

My Collections

A document collection is a set of individual documents. After documents have been uploaded into Managed Documents, users can organize the documents by grouping them into collections.

39. In the left navigation of the managed documents section, click on *My Collections.*

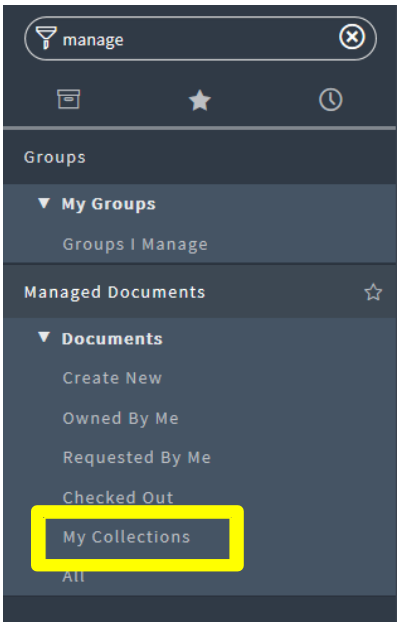

Figure 42 Managed Documents menu.

40. Click the “New” button.

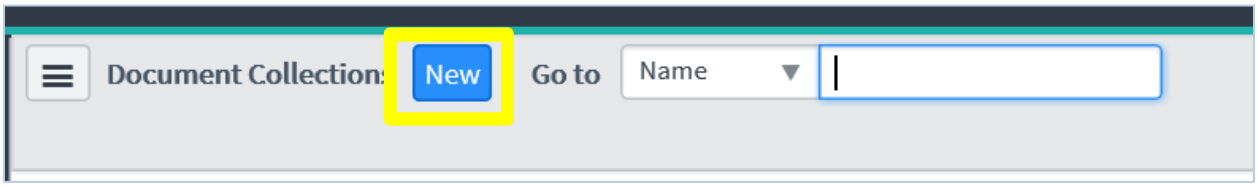

Figure 43 Click on the “New” button to create a new collection.

41. Provide a name for your collection and give your collection a description, then click on either of the “Submit” buttons.

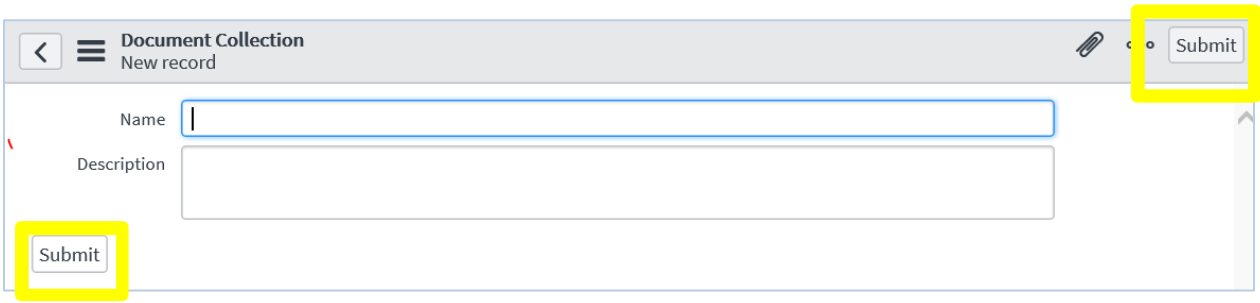

Figure 44 Type in the collection name and description. Then use “Submit” to create the collection.

42. After you have created a collection, you will see a screen similar to the screen shown in Figure 44. To add documents to your collection, click on the name of your document collection.

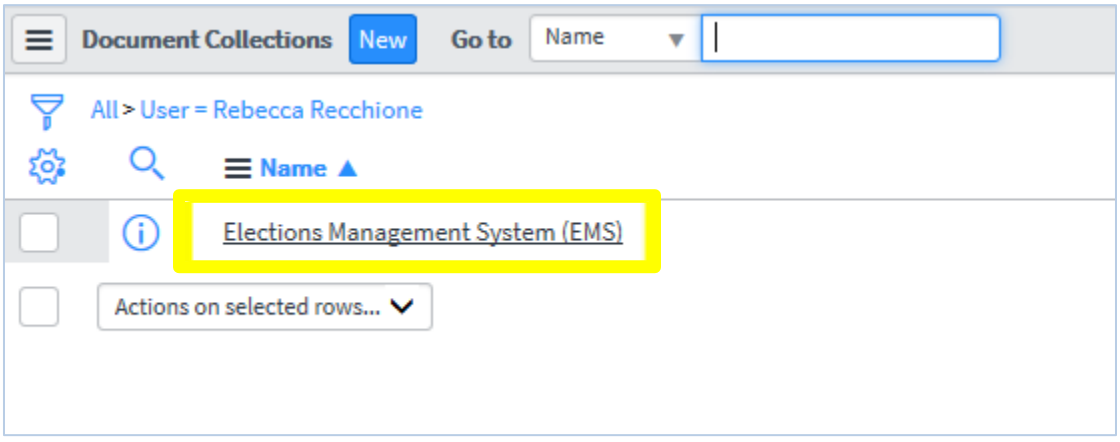

Figure 45 Example of a document collection.

43. Click on the “Edit” button.

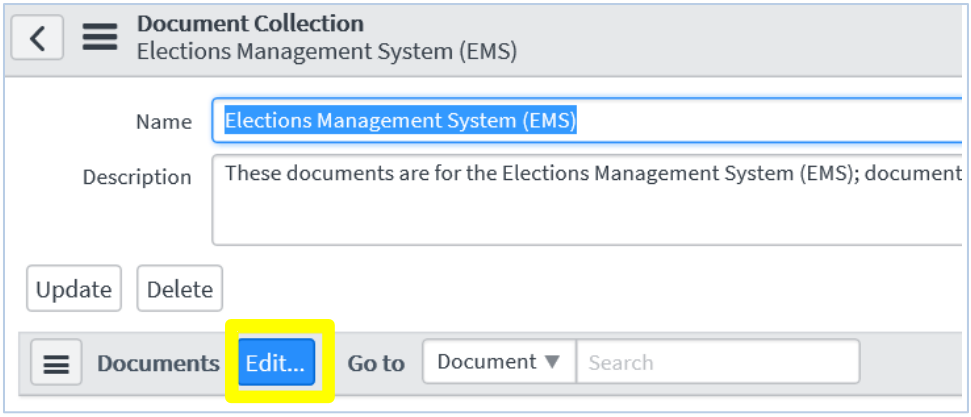

Figure 46 Use the “Edit” button to add documents to a collection.

44. In the collection search field, begin typing in the name of the document you want or if you see the document on the list, select it by double-clicking the document name or single click on the document and use the right point arrow to move the document. After you have all the documents you want added to the collection hit the “Save” button.

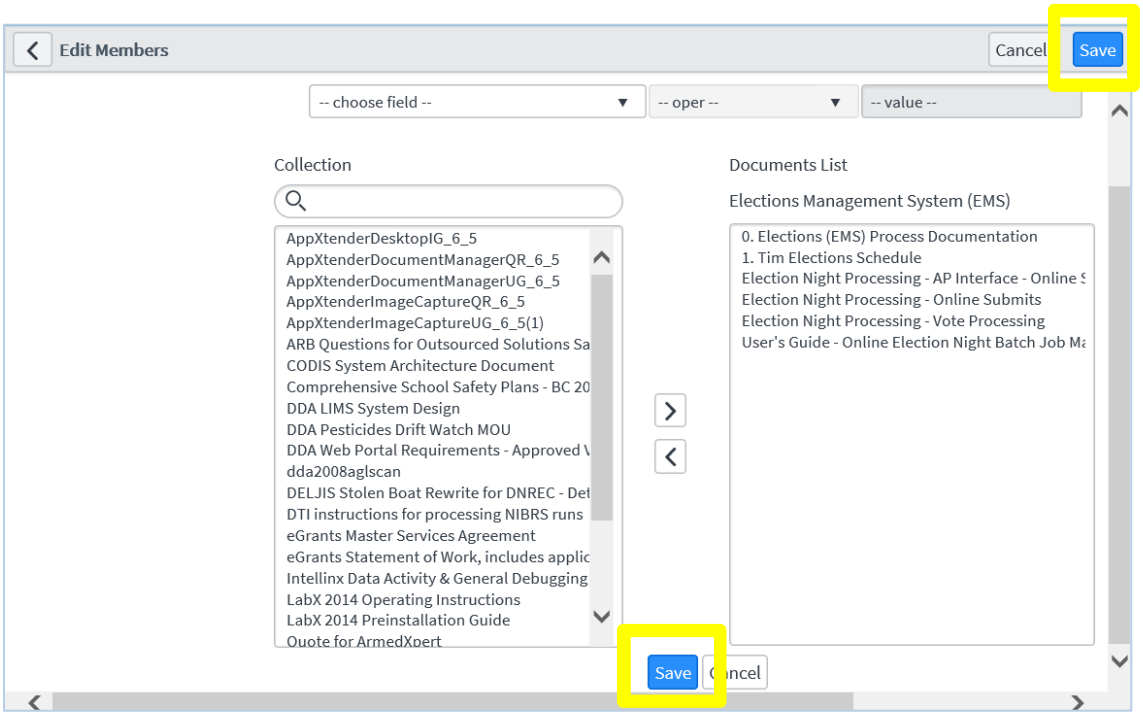

Figure 47 Select documents for a collection; and then click on “Save”.

45. Verify that the documents are within your collection. Here is an example of a customized list of documents for the Elections Management System CI.

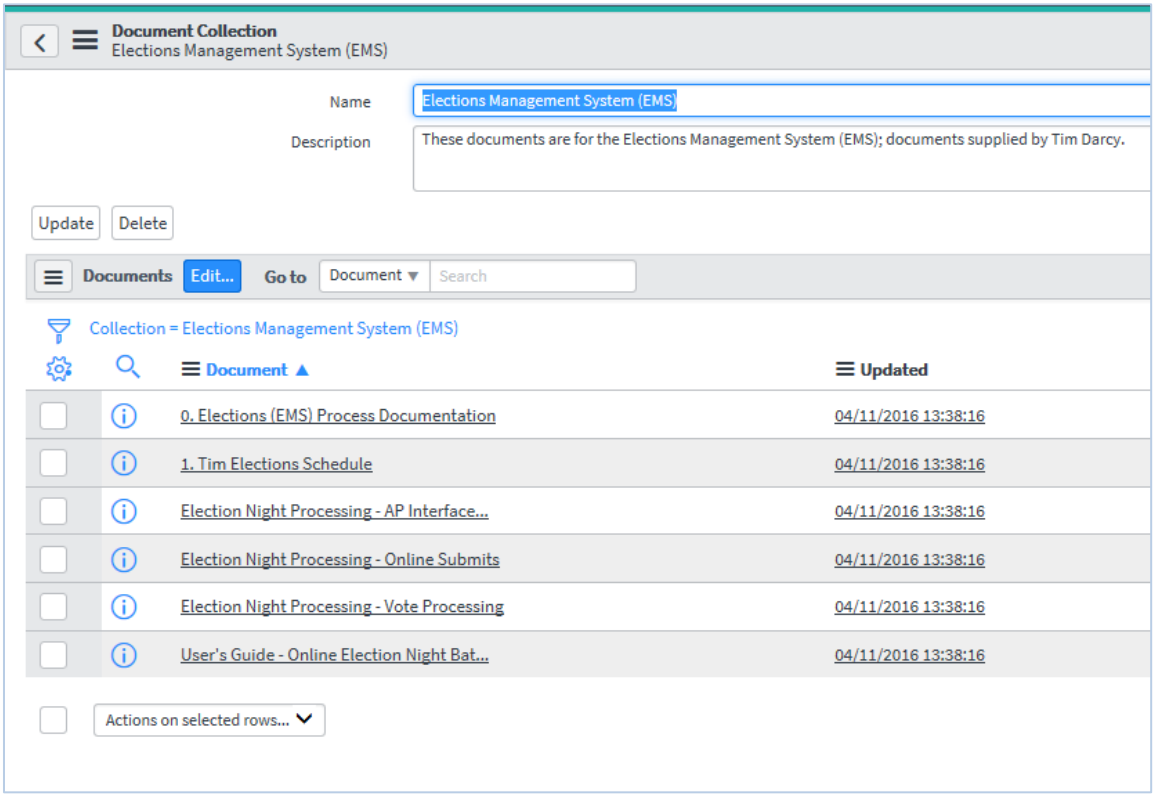

Figure 48 Example a document collection that is created for documents associated with the application Election Management System (EMS).

For more information on managed docs view the SN website at:
https://docs.servicenow.com/search?q=managed+docs