QRC: CSM CONFIGURABLE WORKSPACE

DLA is leveraging **ServiceNow's CSM Configurable Workspace** as a consolidated space for capturing customer interactions and creating personalized lists to track interactions and cases for accounts you support.

Access CSM Configurable Workspace



document.

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CSM Configurable Workspace (continued)

Interactions							
Track interactions by s	tate and view the interactions a	ssigned to you.					
Interactions by	State	Below My T	ools are	e additional widge	ets including a		
300000 —		graph of int	teractic	ons by State , intero	ictions assigne	d	
250000		to you, and	i case-r	elated lists for Age	ents.		
200000							
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Close	d Complete	New Work in Progress	Closed Aban	idoned Action requeste	ed false		Follow-up
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My active intera	ctions 2						
Number -	Opened	Short description	Email		State	Turno	Assignment grou
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IMS0362939	06-28-2024 10:15:04	#95710241650403/SPE4A7-24-F-CV70	1		Work in Progress	Email	SVC DLA CIC
IMS0359256	06-21-2024 11:59:38	(CUI) SAR:W80BTZ41590111			Work in Progress	Fedmall	SVC DLA CIC
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		Last refreshed just now	-				
✓ Cases			<u> </u>				
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	Working with Lists							
	Personalize your list columns and add filters to quickly and easily locate records that are important to you.							
⇒	Interactions - A	All Interactions 32	1 d		5	Bdit columns	it Export Ne	w 3
	Number	# Opened ▼ 2	Account 1	7	3	Save as	Туре	St
	IMS0371782	07-17-2024 15:06:50				Reset widths	Chat 4	Ac
	IMS0371764	07-17-2024 15:03:00	Group by Ac	count		Test	In Person	Ac
	IMS0371734	07-17-2024 14:13:58	Filter			Test	Show Matching	Ac
	IMS0371596	07-17-2024 12:28:21	Advanced filters	applied.		Test to send back	Filter Out	W
~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	Make changes	~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	·····	~~~
1       This number indicates how many records are in the filtered list.       5       Select List Actions (geo • Edit columns: Add, that appear in your • Save as: Save your • Save as: Save your • Reset widths: If you can reset them to t				ctions (gear icon) to p nns: Add, remove, or ear in your list (see be Save your filtered list Iths: If you have mod t them to the system	Dersonalize your list vi reorder the columns slow for more details) to <b>My Lists</b> for future ( ified column widths, default.	iew: s ). use. you		
2	Click any column	header to sort the list by t	hat sort order	6	Click the fun applied to th	nel icon to add, rem ne list. Any previously	ove, or modify filters applied filters will be	,

2	column's values. Click again to reverse the sort order.	6	applied to the list. Any previously applied filters will be included here.
3	Hover over any column header then click the three vertical dots to expand the column actions menu. Use this feature to filter results and group records by value.	7	Select <b>Export</b> to download or email the list data as an Excel file, CSV, JSON, or PDF.
4	Hover over any field value then click the three vertical dots to show only records with that field value, or filter out records with that field value.	8	Select <b>New</b> to open a blank form and create a new record.

#### **Personalized List Columns**

Available columns (196)		Selected columns (11)	
Q Search 2		ii Assigned to	×
Account	> 🏛	: Consumer	×
Action status			
Active		# Action status	×
Active account escalation	>	∷ External Contact	9Th 1
A 3 scalation	>		
🗌 Activity due		II Channel	×
Actual end		" Status	X
Actual start		Status	
Add resolution notes to comments		# Priority	× -

1	Selecting <b>List Actions &gt; Edit columns</b> opens the <b>Edit List</b> modal.
2	Search for a specific field name, or scroll through the list of <b>Available columns</b> .
3	Select the checkbox to add a field to your <b>Selected columns</b> .
4	Select and drag a field name to reorder columns.
5	Select the <b>X</b> to remove a column from your list view.
6	Select <b>Restore to column defaults</b> to undo any list personalization.
7	Select <b>OK</b> to save your changes and refresh your list view.

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#### **Create a Personal List**

In addition to preconfigured lists, the Workspace enables you to create custom queries and save to My Lists.

	Co ≡ List + 1	New List ×				
	My DODAAC Interac     You create another version of an existing       All Interactions - Copy     You create another version of an existing					
	Cases FB5000	List *				
	3 Add new list	6     Q   Search       My Lists       List Name *       Give your new       All Interactions - Copy				
1	From the List tab, select My Lists.	Cases FB5000				
2	Any previously created personal lists are available.	Cases Cancel Create				
3	Select <b>Add new list</b> to create a new personal list.	All Interactions				
4	Select <b>Start from existing</b> to create a personal list based on an existing list. This is the option you will use most often.	Start from existing Create your own				
5	Select <b>Create your own</b> to create a brand new list from scratch.	All Interactions				
6	Select a <b>List</b> as your starting point, choosing among preconfigured lists and existing persona lists.	List Name * My Accounts' Active Interactions 7				
7	Give your personal list a meaningful name.	Select columns *           Number x         Opened x         Account x         Short description x         Type x         State x         DODAAC x         8				
8	Select the columns you would like to include in your list.	Add Filters				
9	Scroll down to <b>Add filters</b> to your personal list. Every filter condition requires selecting a field, an operator, and a value.	Use existing filter          Save filter         O results matching criteria         Sundo C Redo         C Redo         Caldor         Editor         Build a filter by adding conditions that contain a field, operator, and value(s).         10         11         11				
10	Select <b>or</b> to add multiple options for the same filter condition.	9 State				
11	Select <b>and</b> to require multiple elements to satisfy the filter condition.	and Account  is (dynamic)  is (dynamic)  or and ×				
12	Dynamic operators allow you to create filters relative to you; for example, <b>Managed by me</b> .	My account and child accounts My account Cancel Create				
13	Select <b>New condition</b> to add an entirely new filter condition.	relationships				
14	Select <b>Create</b> to create your new personal filtered list, which will be added to <b>My List</b> s.	Select field   Select operator   Enter value or and ×				

Servicenow. QRC: CSM CONFIGURABLE WORKSPACE						
Create New Interaction						
<ul> <li>Create a new interaction in the following ways:</li> <li>1. Select the + sign at the top of the Workspace (Note: The + sign is always located to the right of the last open tab). <ul> <li>a. Select New Interaction to open a completely blank form.</li> <li>b. Select Submit Interaction to DLA CIC to open a form that is pre-assigned to the SVC DLA CIC group.</li> </ul> </li> <li>2. Select New at the top right of any list of interactions.</li> </ul>						
E List + 1 ⇒ Intera Last refres Last re						
≡ List IMS0373095 × +						
Create New Interaction						
Details						
: Interaction						
Number Opened for <b>*</b>						
IMS0373095 1	John Doe 4 8 9 0					
Type * Account *						
In Person 2   NATIONAL ASSOCIATION 5   Q 0						
State	Assignment group *					
New 3	Customer-Facing Service Agent 6 Q 0					
	Assigned to CRM Interaction Agent 7 0 0					
8 Short description Met with John at national academy conference						
Description						
9 We discussed John's needs related to such-and-such, which needs to be addressed by CIC						
Image: Non-Section is assigned a system-generated           Image: Number prefixed by IMS.	6 Assignment group is automatically populated with the group of the individual creating the new incident, but can be changed if needed					
2 Select the relevant interaction <b>Type</b> from the drop down.	7 Assigned to is automatically populated with the individual creating the new incident, but can be changed.					
3 State starts as New; once the new interaction is saved,	8 Capture the summary of the interaction.					
1 Colored the second side O work in Frogress.	9 Capture additional details of the interaction.					
4 Select the appropriate <b>Opened for</b> person.	10 interaction.					
5 Select the <b>Account</b> , which is limited to accounts associated with the selected <b>Opened for</b> user.	11 Select <b>Submit</b> to save your changes and return to the previous screen.					



## **QRC: CSM CONFIGURABLE WORKSPACE**

#### Workspace Tabs

A key feature of the **CSM Configurable Workspace** is the ability to have multiple tabs and subtabs open at the same time.

This enables you to easily navigate among the different records you are working on.

1			
ିର	≔ List	○ IMS0373095 3 ×   IMS037310. 4 × CS1387978 ×	+ 5
	Details	IMS0371728 ×	New Interaction
		6 4	Submit Interaction to DLA CIC
2	SSTA I	/O FAILURE 🔊	

1	Select the <b>Home</b> icon at any time to return to the Workspace landing page.	4	To close a tab, select the ${\boldsymbol X}$ to the right of the record number.
2	Select the <b>Lists</b> icon to return to the <b>List</b> menu, including preconfigured and personal lists.	5	Select the + sign to the right of open tabs to open a new record. Choose between a blank interaction form or an interaction that is preassigned to CIC.
3	Select any open tab to return to that record or list. As you work in the Workspace, prior tabs remain open until you close them.	6	Related records open as subtabs of the parent record. For example, if you select the interaction from which a case was created, the interaction opens in a subtab under the parent case tab.