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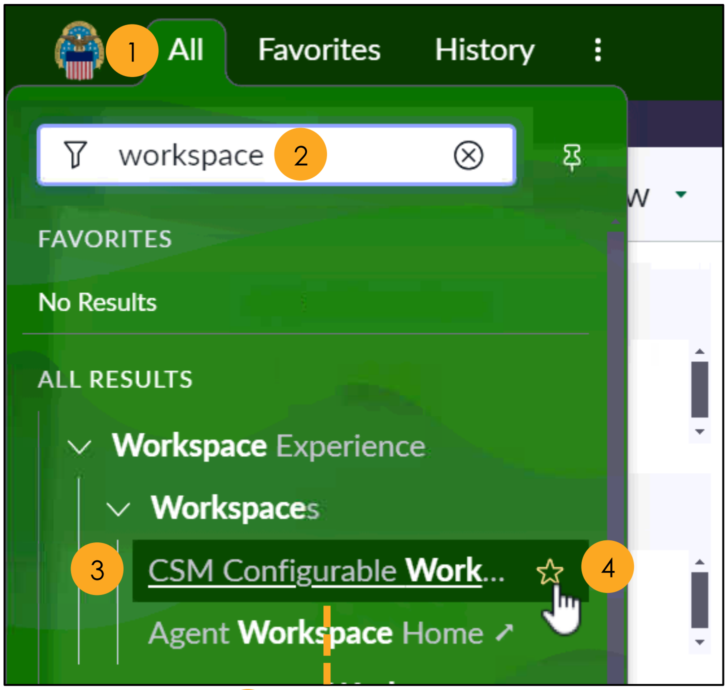
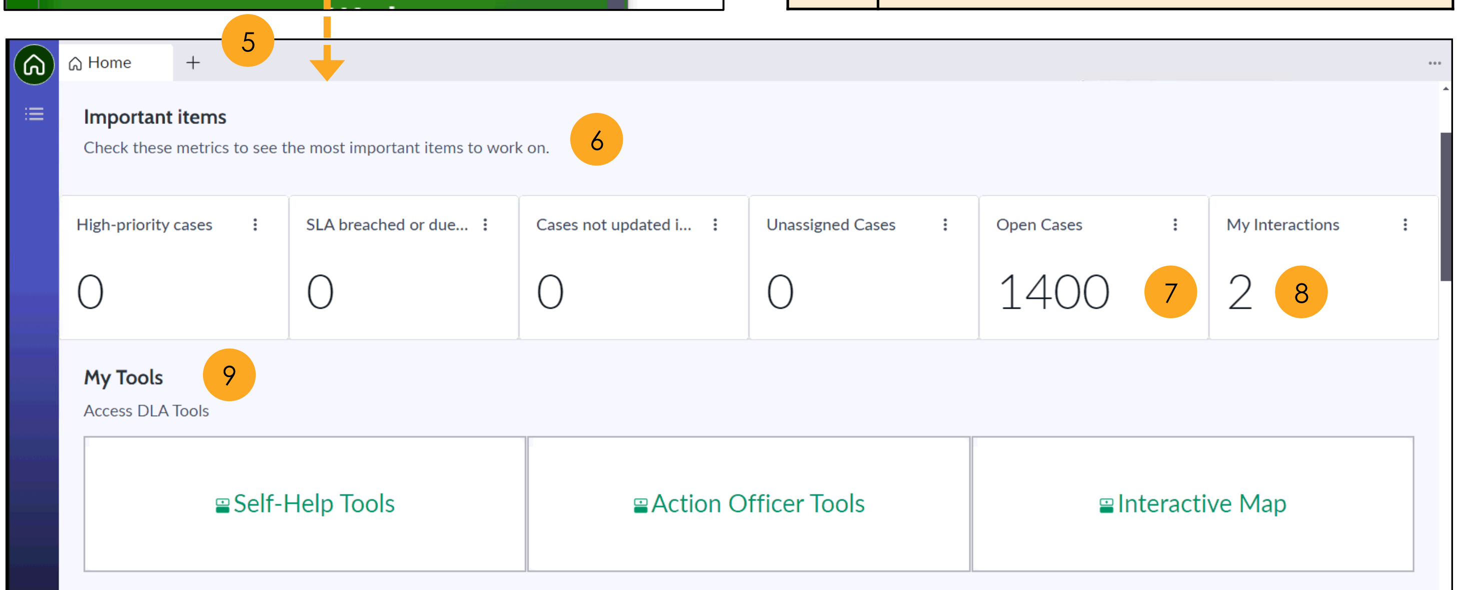
QRC: CSM Configurable Workspace

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

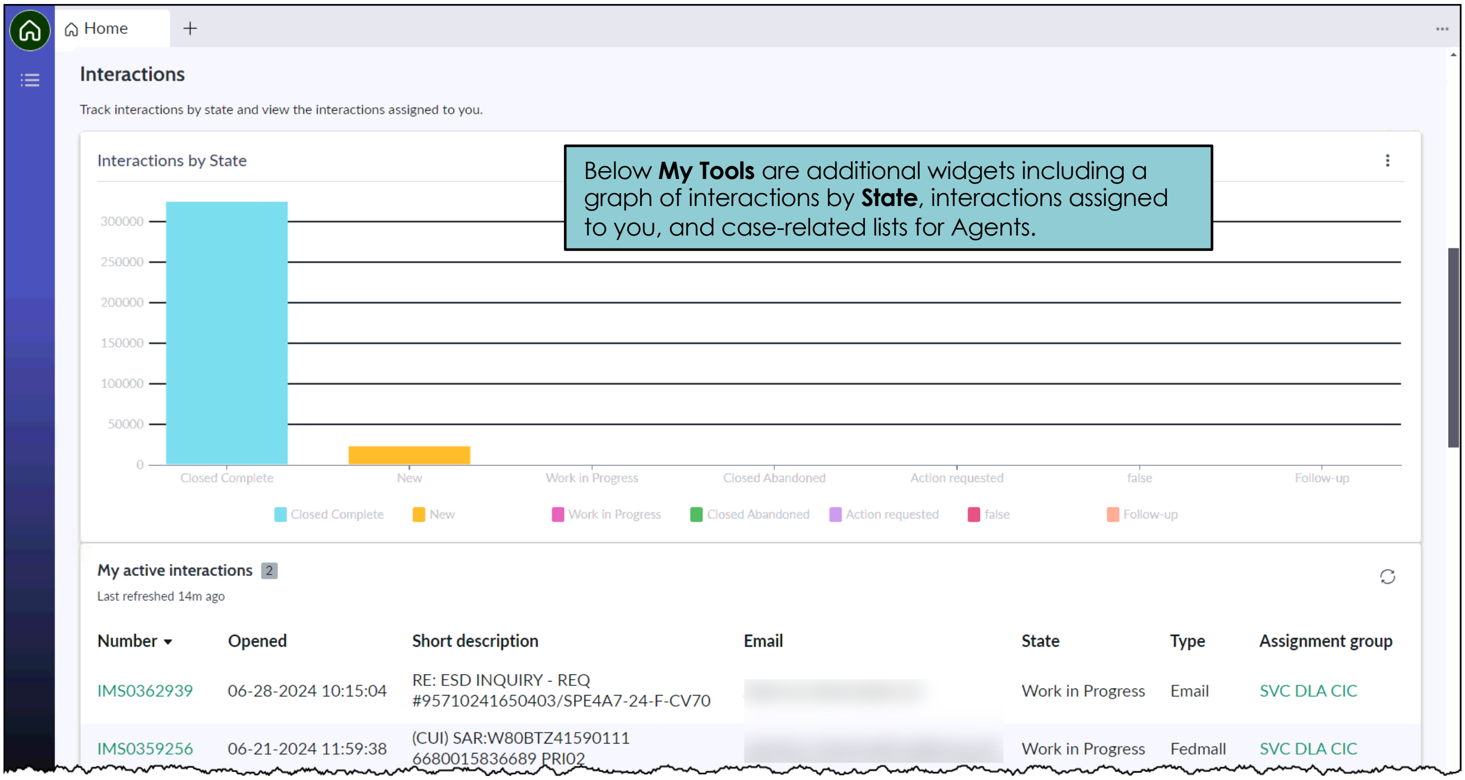


1	From the menu options, select **All**.
2	In the filter, type **workspace**.
3	Under the Workspace Experience application, select the **CSM Configurable Workspace** module.
4	**Tip:** Hover over the Workspace module and select the star to add it to your **Favorites** list for easy access.
5	The **CSM Configurable Workspace** opens to an interactive dashboard that provides summary data and reports for interactions and cases.

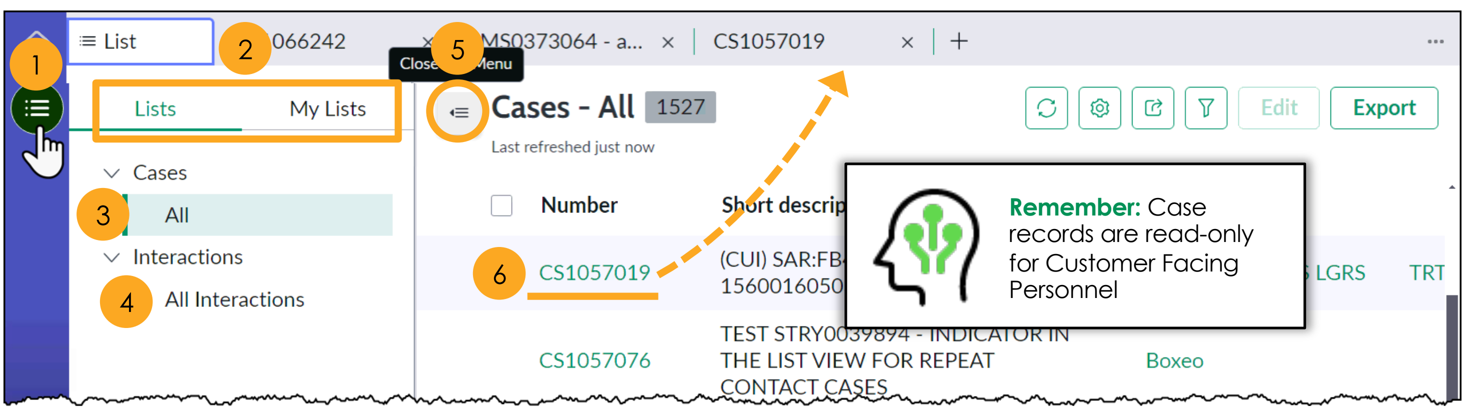


6	At the top of the dashboard are widgets summarizing key statistics. Click any summary number to open the list of underlying records.	8	Alternatively, click **My Interactions** to open a list of all interactions currently assigned to you.
7	For example, Click **Open Cases** to view a list of all open cases; in this case, 1400. Note that while Agents can edit case data, the forms are read-only for Customer Facing Personnel.	9	The **My Tools** section offers direct links to helpful DLA resources outside of ServiceNow.

CSM Configurable Workspace (continued)



Access Workspace Lists



1	From the left side menu, select the **Lists** icon to display the preconfigured Workspace lists.	4	Select **Interactions > All Interactions** to open a list of all Interactions in the Workspace.
2	The first tab, **Lists**, offers lists of Cases and Interactions. The second tab, **My Lists**, includes any personal filtered lists you have created. This is covered later in this document.	5	Select **Close List Menu** to collapse the list menu, providing additional screen real estate.
3	Select **Cases > All** to open a list of all Cases in the Workspace. List filtering is covered later in this document.	6	Select any case or interaction **Number** in the list to open in a new tab. Previous tabs remain open.

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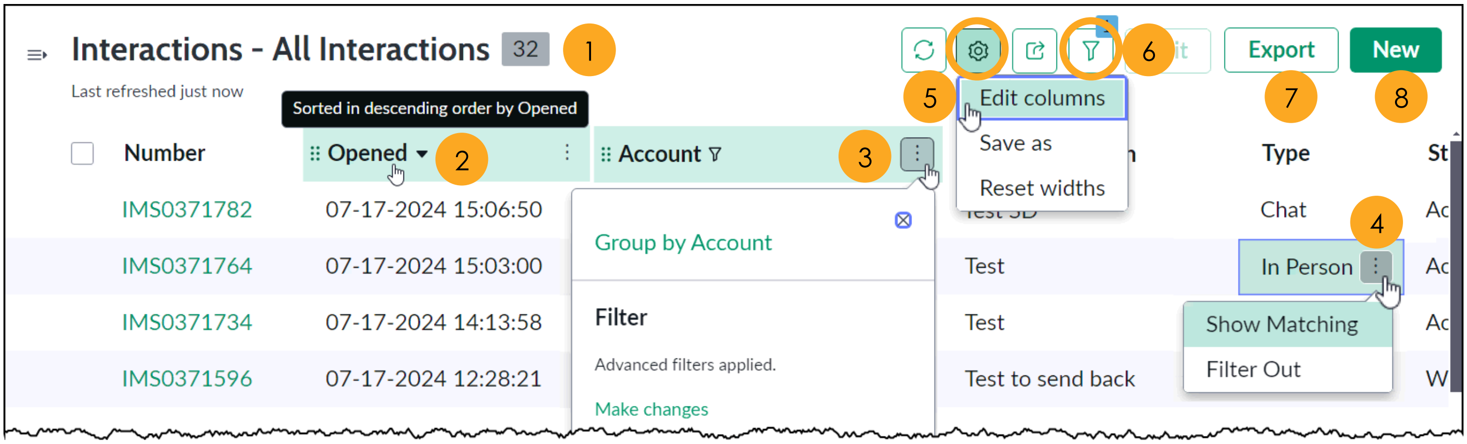
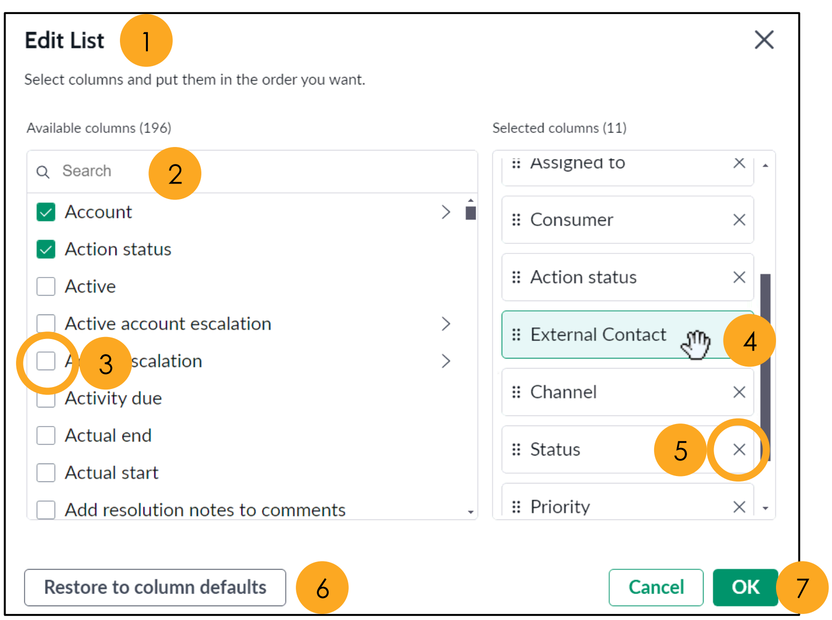
Working with Lists

Personalize your list columns and add filters to quickly and easily locate records that are important to you.



1	This number indicates how many records are in the filtered list.	5	Select **List Actions** (gear icon) to personalize your list view: • **Edit columns**: Add, remove, or reorder the columns that appear in your list (see below for more details). • **Save as**: Save your filtered list to **My Lists** for future use. • **Reset widths**: If you have modified column widths, you can reset them to the system default.
2	Click any column header to sort the list by that column's values. Click again to reverse the sort order.	6	Click the funnel icon to add, remove, or modify filters 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 **Export** 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 **New** to open a blank form and create a new record.

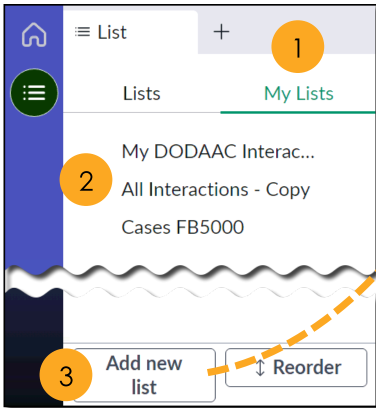
Personalized List Columns

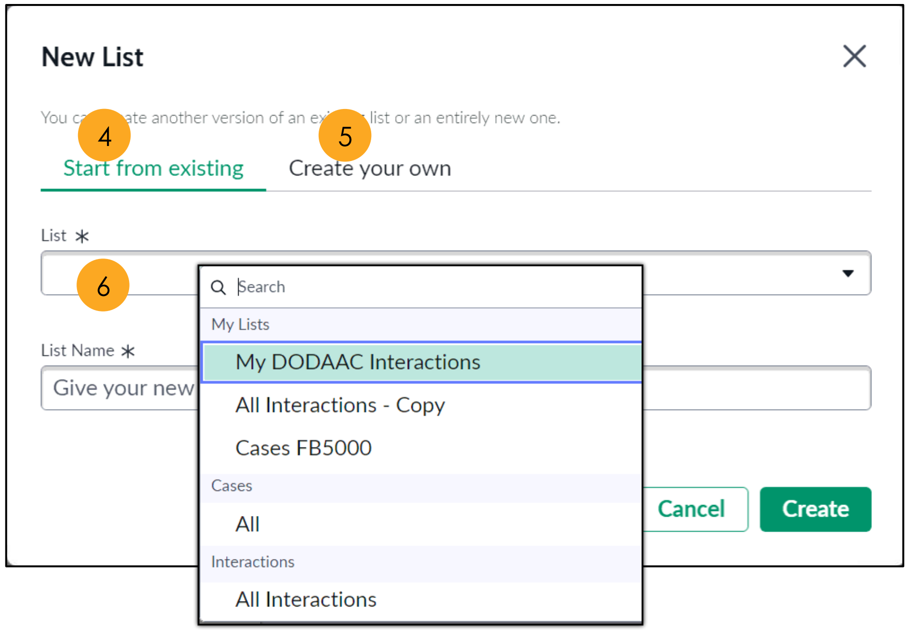


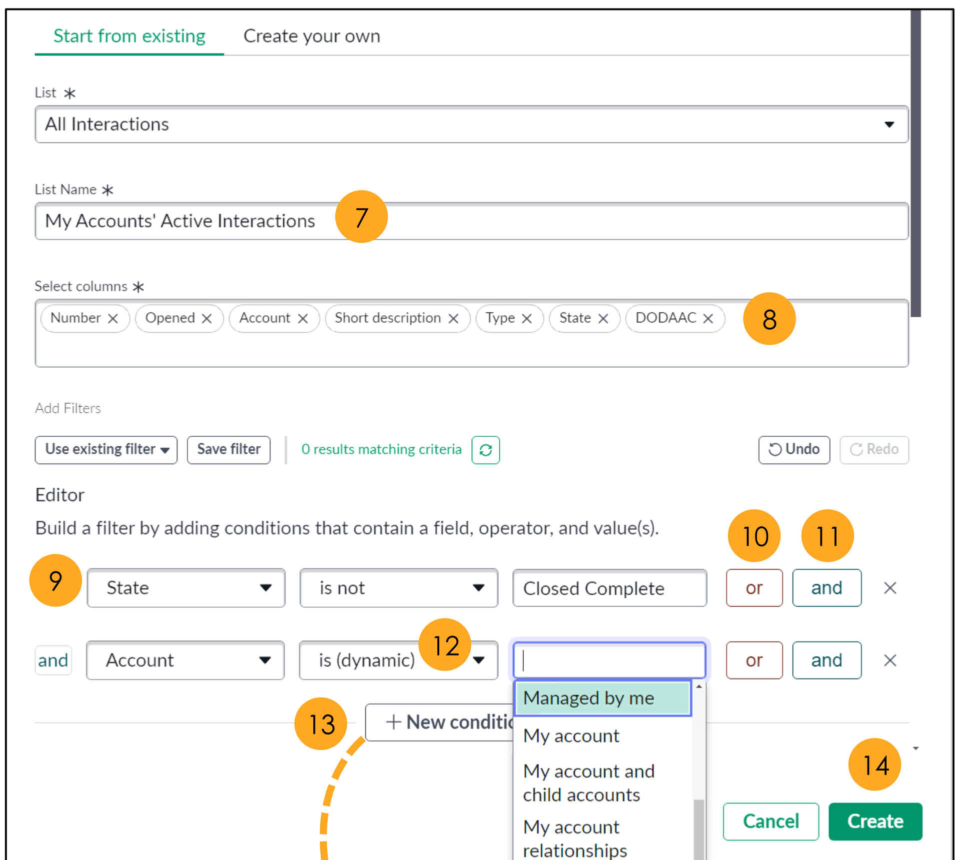
1	Selecting **List Actions > Edit columns** opens the **Edit List** modal.
2	Search for a specific field name, or scroll through the list of **Available columns**.
3	Select the checkbox to add a field to your **Selected columns**.
4	Select and drag a field name to reorder columns.
5	Select the **X**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

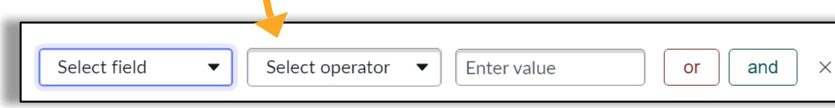
Create a Personal List

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









1	From the **List** tab, select **My Lists**.
2	Any previously created personal lists are available.
3	Select **Add new list** to create a new personal list.
4	Select **Start from existing** to create a personal list based on an existing list. This is the option you will use most often.
5	Select **Create your own** to create a brand new list from scratch.
6	Select a **List** as your starting point, choosing among preconfigured lists and existing persona lists.
7	Give your personal list a meaningful name.
8	Select the columns you would like to include in your list.
9	Scroll down to **Add filters** to your personal list. Every filter condition requires selecting a field, an operator, and a value.
10	Select **or** to add multiple options for the same filter condition.
11	Select **and** to require multiple elements to satisfy the filter condition.
12	Dynamic operators allow you to create filters relative to you; for example, **Managed by me**.
13	Select **New condition** to add an entirely new filter condition.
14	Select **Create** to create your new personal filtered list, which will be added to **My Lists**.

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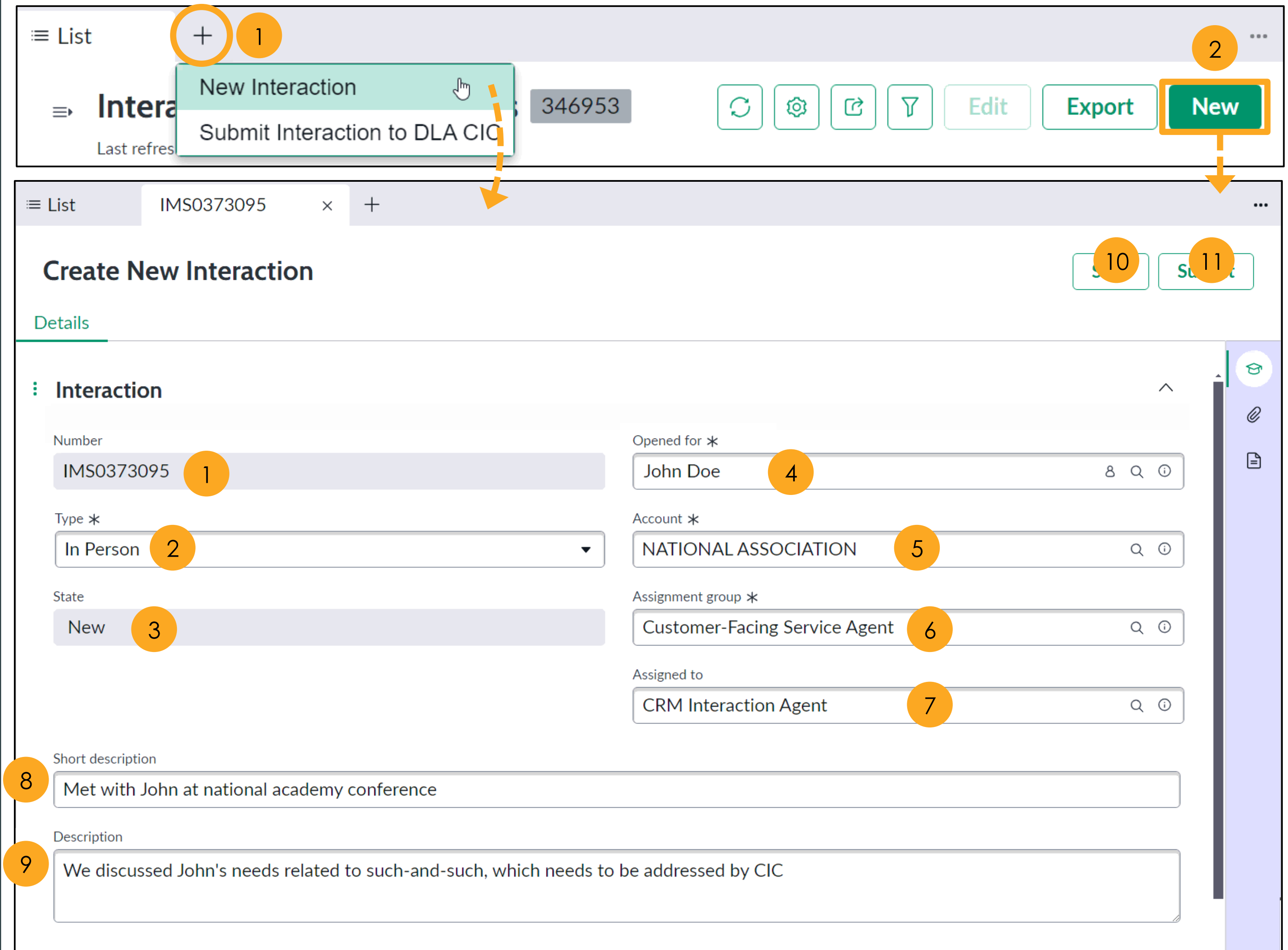
Create New Interaction

Create a new interaction in the following ways:

1. Select the + sign at the top of the Workspace (**Note:** The + sign is always located to the right of the last open tab).
   a. Select **New Interaction** to open a completely blank form.
   b. Select **Submit Interaction to DLA CIC** to open a form that is pre-assigned to the SVC DLA CIC group.
2. Select **New** at the top right of any list of interactions.



1	Every interaction is assigned a system-generated **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 **Type** 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, it automatically moves to **Work in Progress.**	8	Capture the summary of the interaction.
		9	Capture additional details of the interaction.
4	Select the appropriate **Opened for** person.	10	Select **Save** to save your changes and remain on the interaction.
5	Select the **Account**, which is limited to accounts associated with the selected **Opened for** user.	11	Select **Submit** to save your changes and return to the previous screen.

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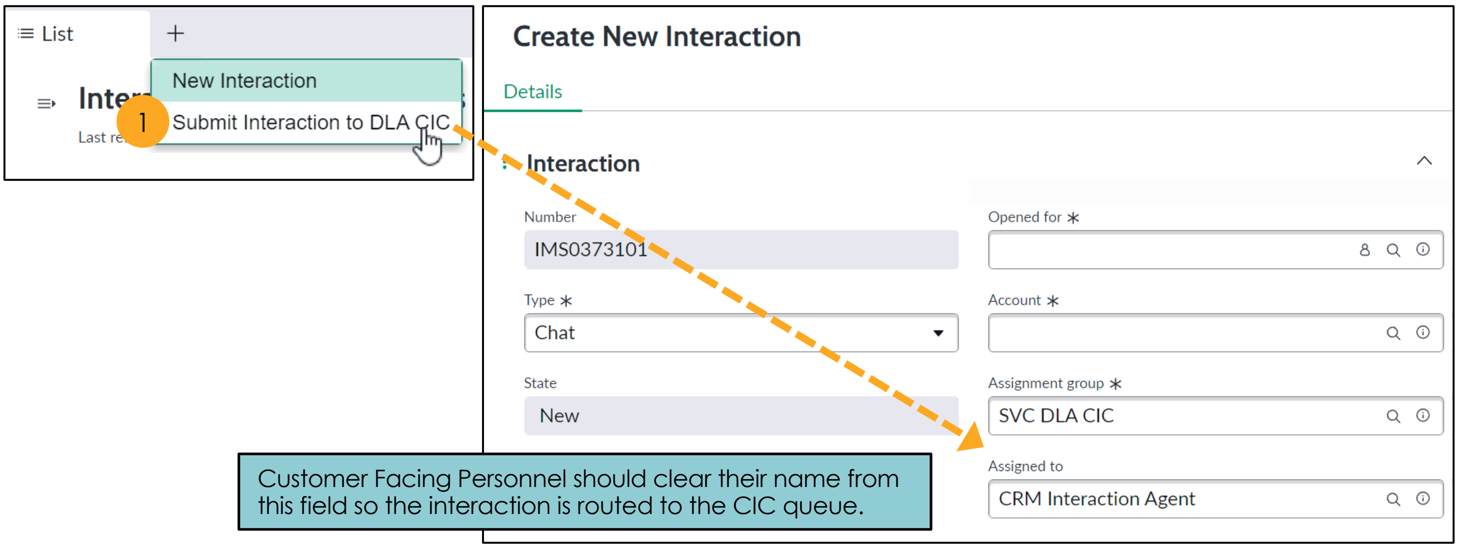
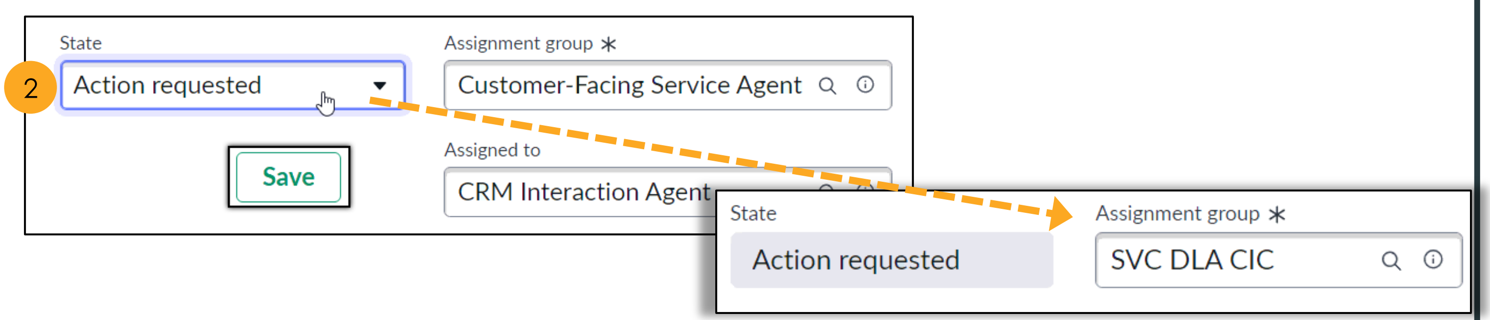
Send Interactions to CIC

Customer-Facing Personnel have a couple options for sending interactions to the CIC for additional support.

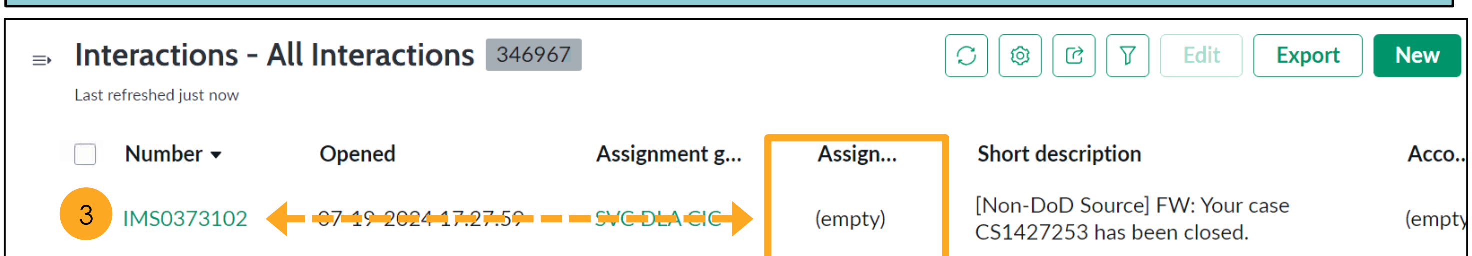
1. Selecting **Submit Interaction to DLA CIC** pre-assigns the new interaction to the SVC DLA CIC group; however, it also assigns it to the user creating the record.



2. Updating the **State** of an active interaction to **Action requested**, then selecting **Save**, automatically reassigns the record to the SVC DLA CIC group.



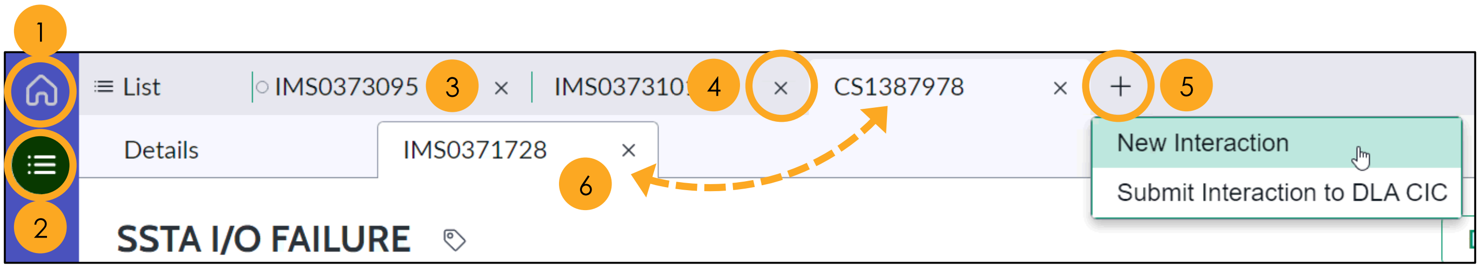
3. Additionally, when **CIC Agents** open an interaction, the record is automatically assigned to them. (Note that this is *not* the case for Customer Facing Personnel.)



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	Select the **Home** icon at any time to return to the Workspace landing page.	4	To close a tab, select the **X** to the right of the record number.
2	Select the **Lists** icon to return to the **List** 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.