December 12, 2024

Now Assist for Customer Service Management (CSM) and Now Assist Q&A Genius Results

Affected Customers: CCSQ ServiceNow Customers using Next Experience UI (Platform) or CSM Configurable Workspace, Public Q&A Portal Submitters

On December 12, 2024, at 8:30 PM ET, Now Assist will be implemented in the following places:

- Now Assist for CSM:
  - Customer Service Management (CSM) Configurable Workspace for the following case types:
    - Original Case Form
    - Electronic Prescribing of Controlled Substances (EPCS)
    - End Stage Renal Disease Quality Reporting (EQRS)
    - Enterprise Services (ES)
    - Hospital Hardship (HH) (Case Summarization only)
    - Hospital Quality Reporting (HQR)
    - Internet Quality Improvement and Evaluation System (iQIES/QIES)
    - Quality Payment Program (QPP)
  - Next Experience UI (Platform)
- Now Assist Q&A Genius Results:
  - Q&A Portal
  - CCSQnow Self Service Portal
  - Customer Service Management (CSM) Configurable Workspace
  - Next Experience UI (Platform)

What is Now Assist Q&A Genius Results?

Now Assist Q&A Genius Results are now available on the Q&A Portal (*Figure 1*), CCSQnow Self-Service Portal (Figure 2), and Next Experience UI (Platform) (*Figure 3*) and will enable users to find answers quickly when searching. Now Assist Q&A Genius Results provides actionable answers and resolutions from trusted Knowledge Base and Service Catalog sources.

The Now Assist Q&A Genius Results are identified by a label stating: "Answer generated by Now Assist. Check sources for accuracy."
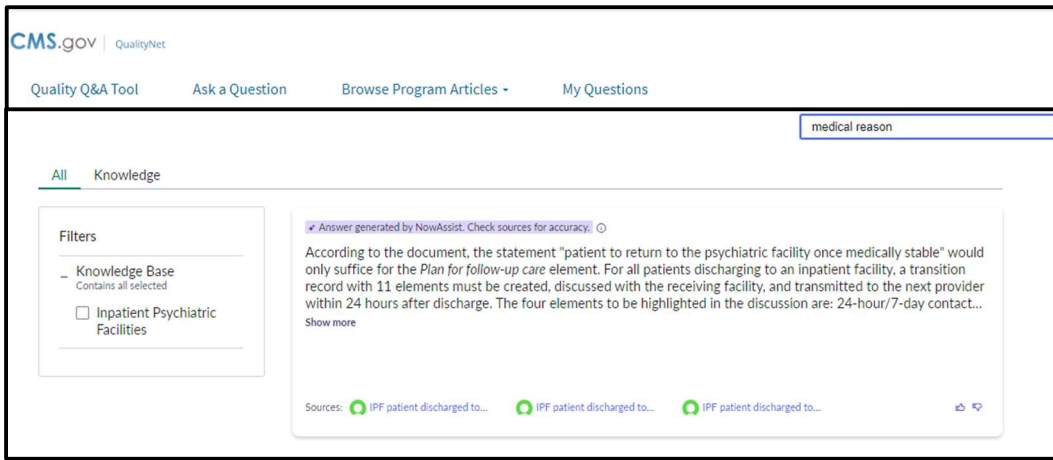
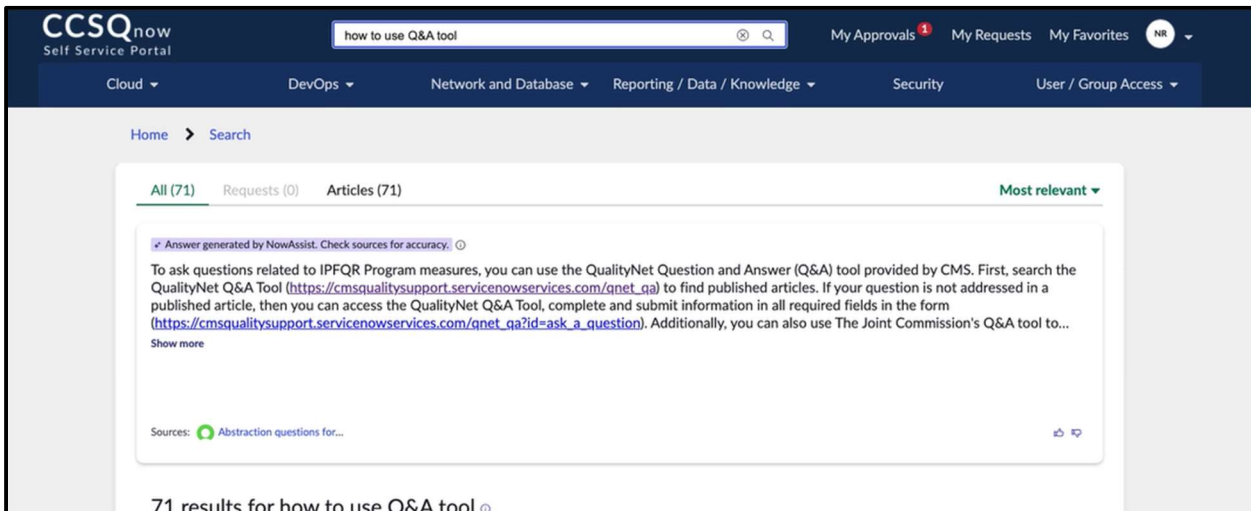*Figure 1: Now Assist Q&A Genius Results in Q&A Portal*

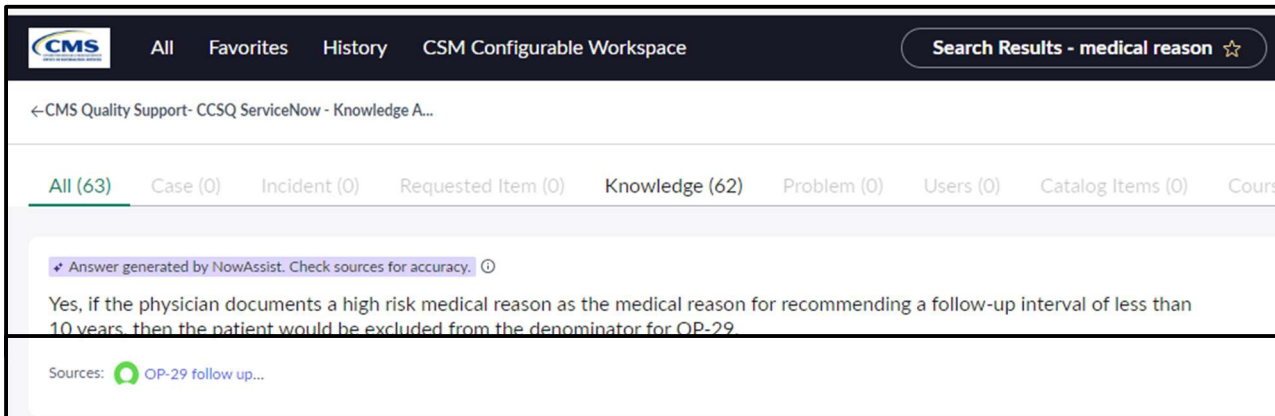*Figure 2: Now Assist Q&A Genius Results in CCSQnow Self Service Portal*

Figure 3: Now Assist Q&A Genius Results in Next Experience UI (Platform)

What is Now Assist in CSM Configurable Workspace?

Now Assist will allow Customer Service Management (CSM) to streamline interaction notes for service center representatives and case managers. This will provide more efficient and effective customer experience.

Now Assist will have the following functionalities in the ServiceNow Platform and CSM Configurable Workspace:

- **Case Summarization** – provides a concise summary of a case, including the issue, actions taken, and resolution details.
- **Propose Solution** – generates resolution notes for a case, propose the resolution to the customer, and add the resolution information to the case record.
- **Chat Summarization** – generates a summary of the Virtual Agent chat history.

How do I use Now Assist?

Summarize a case by using Now Assist in Next Experience UI (Platform) and CSM Configurable Workspace

Once a case is created, case summarization is available.

1. Navigate to **Workspaces > CSM Configurable Workspace** and open a customer service case.
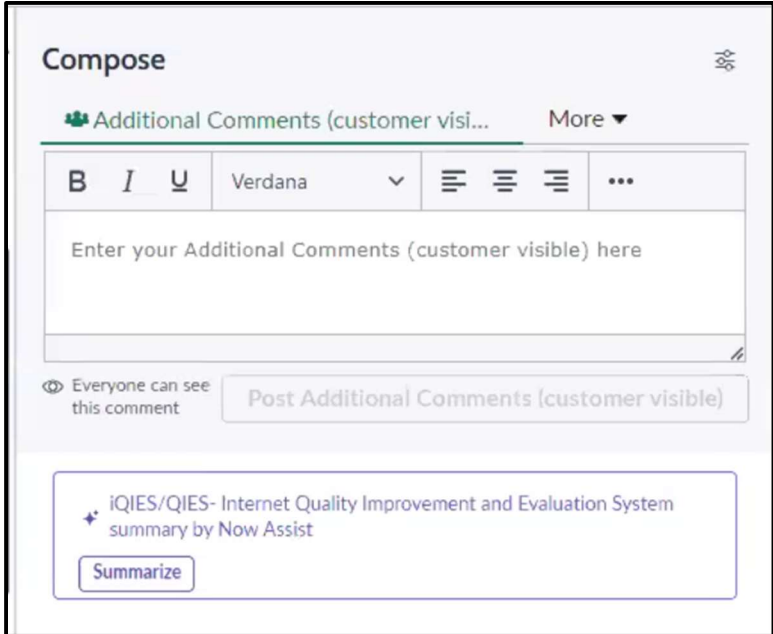2. Under **Compose** Section the **Summarize** button will be available. (*Figure 3*)

Figure 3: Case Summarization button

The Case Summary by Now Assist component appears above the activity stream. By default, the component is collapsed and expands to display the summary. For longer summaries that don't fit in the window, select View more and use the scroll bar to view the rest of the content.

Note: Generating and displaying the summary may take several seconds.

3. (Optional) When finished with summarizing a case, users can add it to the case work notes, expand or collapse it, provide feedback (👍 👎), copy it (clipboard icon), or view information about it. (*Figure 4*)
   - If **Share to work notes** is selected, a pop-up window will appear with the AI-generated summary, and users can make any needed edits before saving. (*Figure 5*)
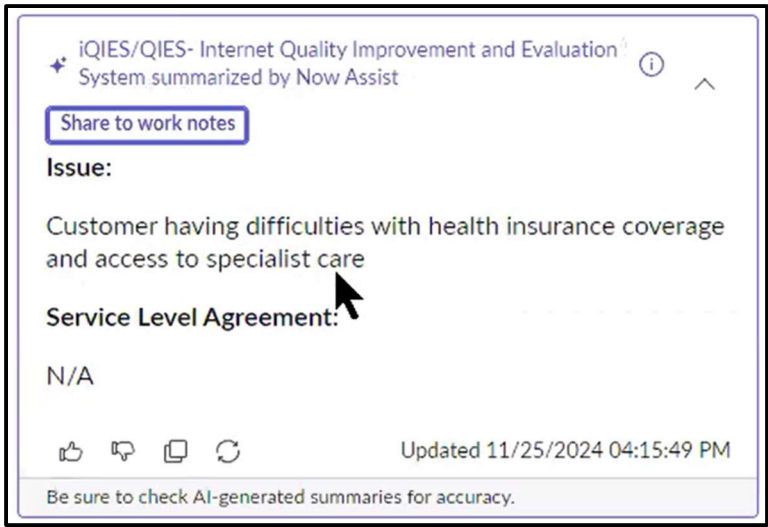

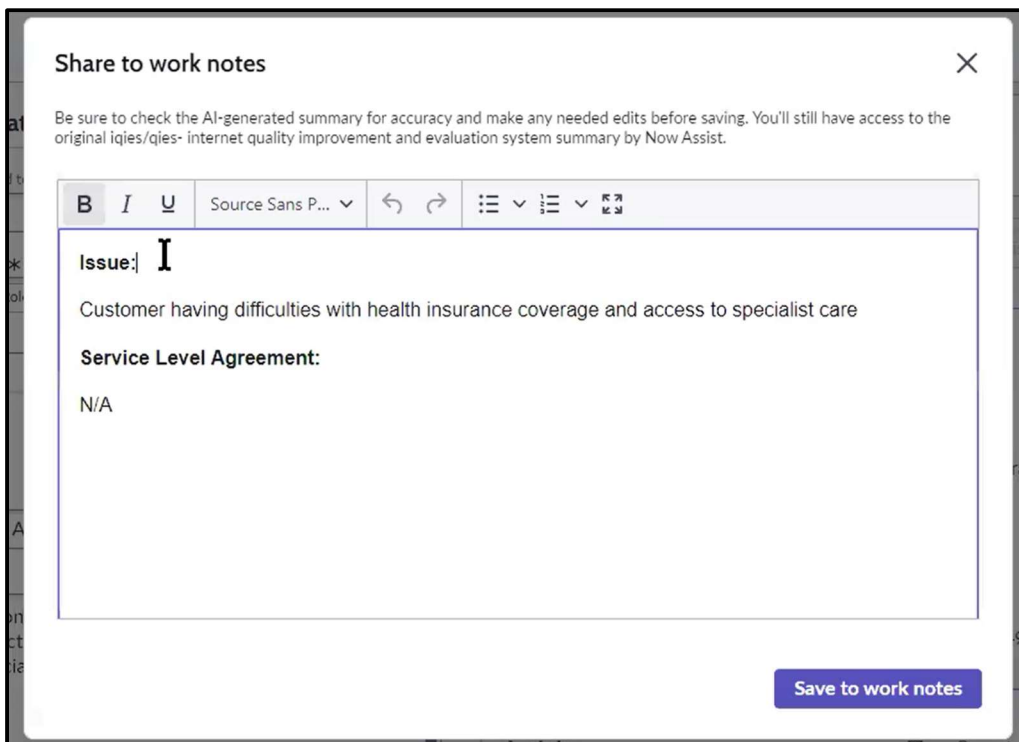Figure 4: Case Summarization Options

Figure 5: Share to work notes popup

Generate the resolution notes for a case by using Now Assist in Next Experience UI (Platform) and for CSM Configurable Workspace

In Next Experience UI (Platform) and CSM Configurable Workspace, users can generate the resolution information for a case by selecting **Propose Solution** on the case record (*Figure 6*). A pop-up will appear (*Figure 7*), and users will need to fill in:

- First Call Resolved
- Close Code
- Work notes (Private)

Close notes (customer visible) will be generated by Now Assist and users can review and edit the Close notes text before clicking **Propose**.
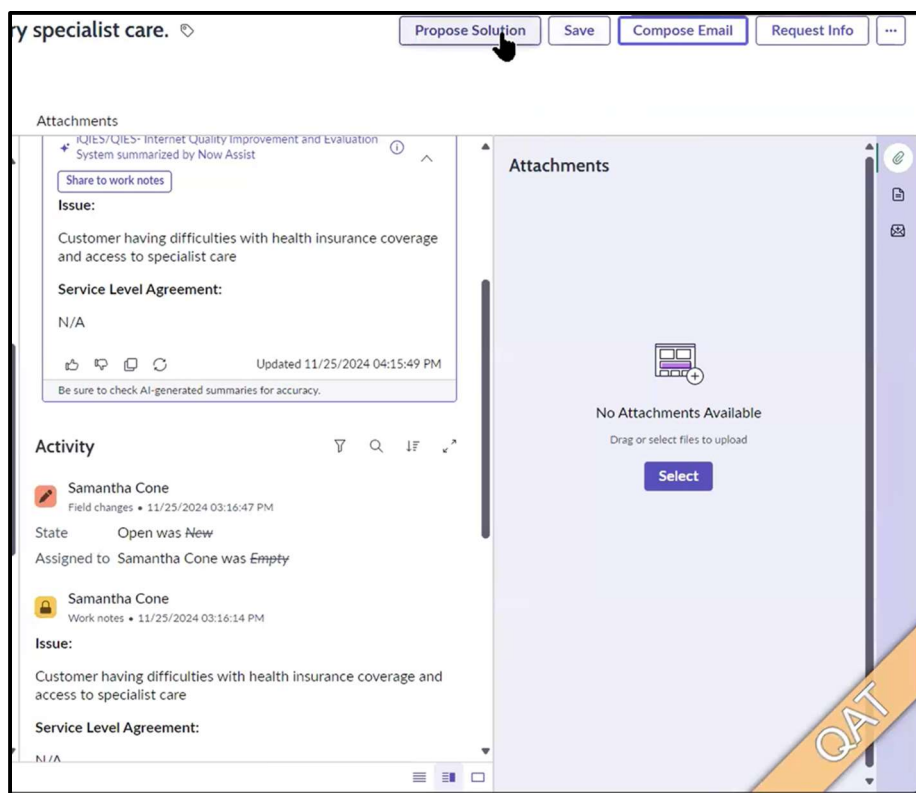

Figure 6: Propose Solution Button

Figure 7: Propose Solution Popup

Once **Propose** is clicked the following will occur:

- **Case State** changes to Resolved
- **Close Code** has been filled in
- **First Call Resolved** has been filled in
- **Work notes (private)** will be added to the activity stream
- **Close notes (Customer visible)** has been filled in

Summarize a chat conversation by using Now Assist for CSM Configurable Workspace

The following steps will need to be taken to summarize a chat conversation using Now Assist.

1. Open the interaction number in CSM Configurable Workspace.
2. The chat summarization skill updates the **Short description** and **Chat Summary** fields on the interaction record. Fields with the Now Assist Icon (✦) have alternate text available (*Figure 8*).

   Note: If necessary, users can create a case or incident from an interaction record. The system uses information from the **Short description** and **Chat Summary** fields on the interaction record to populate the **Short description** and **Description** fields on the case record.

The system displays the Now Assist icon (✦) next to these fields and removes the icon if the agent makes changes to the fields and saves the record.

Figure 8: Chat Summarization

Now Assist Panel in CSM Configurable Workspace

The Now Assist Panel in CSM Configurable Workspace is easily accessible to have all buttons in one place, to access click the star symbol located on the top right (*Figure 9*). A chat box will appear and Now Assist will present 3 options (*Figure* 10):

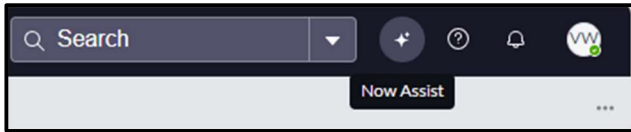- Generate resolution notes
- Summarize a record
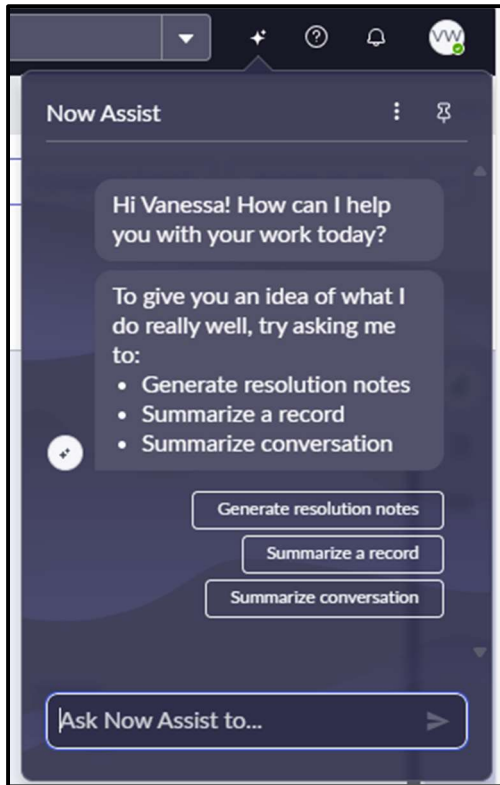- Summarize conversation

Figure 9: Now Assist Panel

Figure 10: Now Assist Options

Generate Resolution Notes or Summarize a Record via Now Assist Panel in CSM Configurable Workspace

There are 2 paths for Now Assist to generate resolution notes or summarize a record:

1. If a case was left open in CSM Configurable Workspace
2. If you recently worked on a case, it will automatically search for that case. If not, it will ask you to provide a record number

If the summary is too lengthy, users can ask Now Assist to shorten the conversation further (*Figure 11*).

By hovering over the AI Chat Response, users have the option to give feedback (👍 👎) or copy it (clipboard). Users may click the three (3) dots stacked on top of each other to reset the conversation (*Figure 12*).

Note: Users may include the case number before or after the ask, including the number before the ask will result in options being presented. Click on "(Topic) Summarize a record" and the case will be summarized (*Figure 12*).
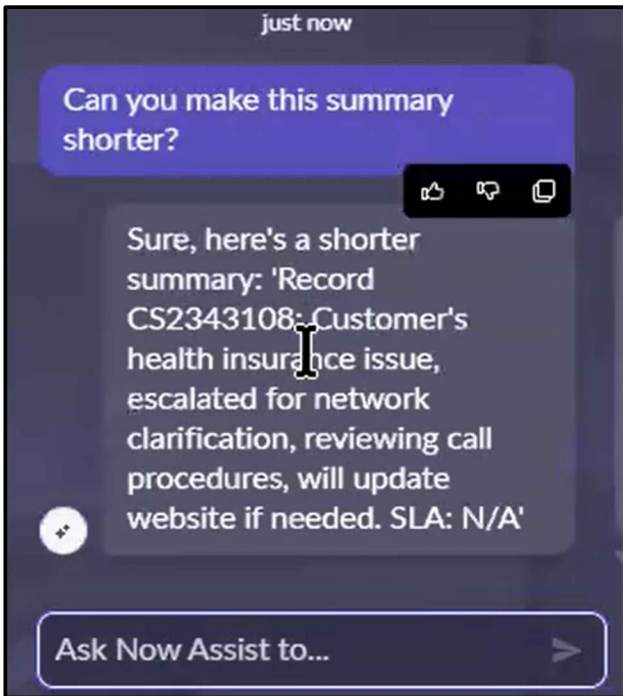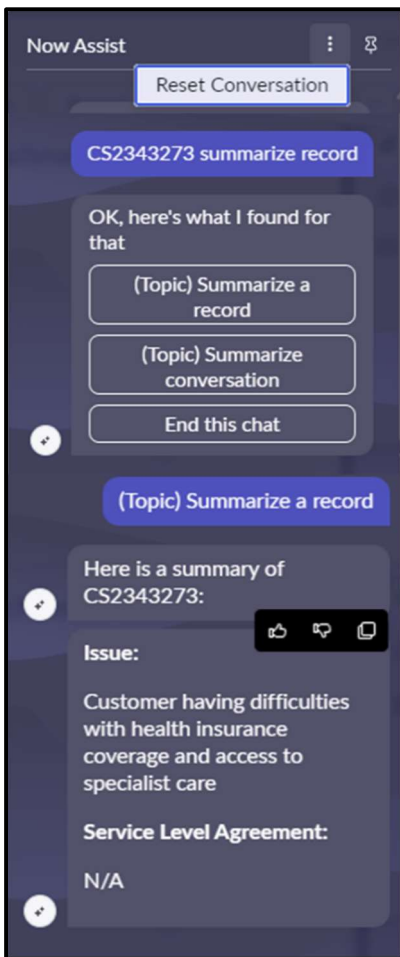
Figure 11: Shortening Summary

Figure 12: Now Assist Panel Options

Summarize a chat conversation by using Now Assist Panel in CSM Configurable Workspace

There are 3 paths for summarizing conversation using the Now Assist Panel in CSM Configurable Workspace:

1. Most recently discussed case in chat
2. An interaction record was left open in CSM Configurable Workspace
3. Giving an interaction number i.e.: Summarize Conversation IMS0003705

Note: Now Assist will not be able to summarize the conversation if no chat log is available, and no interaction number is given.

If the summary is too lengthy, users can ask Now Assist to shorten the conversation further (*Figure 13*).
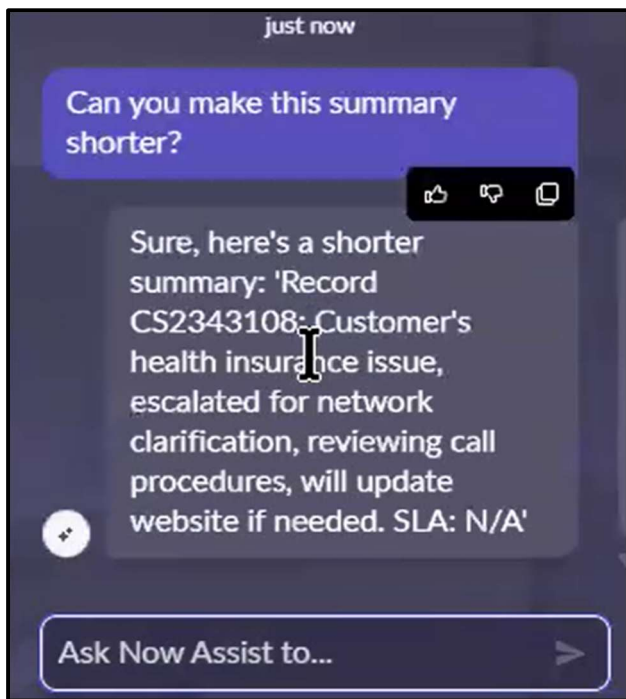
Figure 13: Shortening Summary

To learn more about how to utilize Now Assist in Next Experience UI (Platform) and in CSM Configurable Workspace, CCSQ ServiceNow Internal Customers may read the knowledge article: [Now Assist in CSM Configurable Workspace Guide](#).

If you need additional information, contact us:

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