Yale Incident and Service Catalog Training Manual

Table of Contents

Introduction to ServiceNow 4
- **What is ServiceNow? 4**
- **What is SaaS? 4**
- **What is PaaS? 4**
- **What browsers are supported 4**
- **Logging in to ServiceNow 4**
- **Homepage 4**
- **Editing Homepage Content 6**
- **Left-Hand Navigation Toolbar 7**
- **ServiceNow Header 9**
- **UI 9**
- **Editing Lists 10**
  - Column Sorting 10
  - Personalized Lists 10
  - Customized Filters 12

Incident Process 13
- **High-Level Process 13**
- **RACI Chart 14**
- **Main Roles 15**
  - Service Desk Analyst 15
  - Service Desk Queue Manager 15
- **ServiceNow Roles 16**
- **Policies 16**
- **Process Procedures 17**
  - 1.0 Incident Logging 17
  - 2.0 Incident Categorization 18
  - 3.0 Incident Prioritization 19
  - 4.0 Incident Diagnosis 20
  - 5.0 Functional Escalation 21
  - 6.0 Investigation and Diagnosis 22
  - 7.0 Resolution and Recovery 23
  - 8.0 Incident Closure 24
  - 9.0 Major Incident Process 25

Incidents 26
- **Creating New Incidents 26**
- **New Call 26**
- **Field Basics 27**
- **Incident Form 27**
- **Incident States 29**
- **Field Definitions 30**
- **Tabs 32**
  - Notes Tab 32
  - Related Records 33
  - Resolve Information 34
  - QA 34

Security 35
Affected CIs 35
Child Incidents 37
Task SLAs 37
Time Worked 37
Metrics 38
Attachments 39
Viewing Client History 39
Saving Incidents 40
Assignment Group and Assigned To 40
Assign to me button 42
Clone Incident Button 43
Creating Templates 43
Resolve Incident 44
Notifications 44

Service Desk Queue Management 46
Homepage 46
Incident Application 46
Incident Overview 47

Requests 47
Creating New Requests 49
New Call Screen 49
Service Catalog 50
Generic Request 50
Request Basics 52
Colors 52
Order Now vs. Add to Cart 52
Order Summary Screen: 52
Checking Status 53
Working Requests 54
Finding Work 54
Approvals for Items 54
Approvals on Tasks 55
Updates 55
Tasks 56
Service Catalog Lists 56

Service Desk 58
Callers 59
Incidents 59
Knowledge 59
My Work 60
My Groups Work 60
My approvals 60
My Work (SLA's) 61
My Groups Work (SLA's) 61

Introduction to ServiceNow

What is ServiceNow?

Service Now is a suite of cloud-based services for enterprise IT management. It is built and designed around ITIL principles.

What is SaaS?

Software as a Service, sometimes referred to as “on-demand software”, is a software delivery model where software and any data associated with it are hosted off-site, typically over the internet. ServiceNow hosts all software and data centrally at the ServiceNow server farms and are accessed via the internet on a web browser. VPN is not needed to access Service Now.

What is PaaS?

Platform as a Service is the delivery of a computing platform and solution Stack as a service. This means that users need only to buy the service, but do not have to worry about maintaining the underlying hardware and software.

What browsers are supported

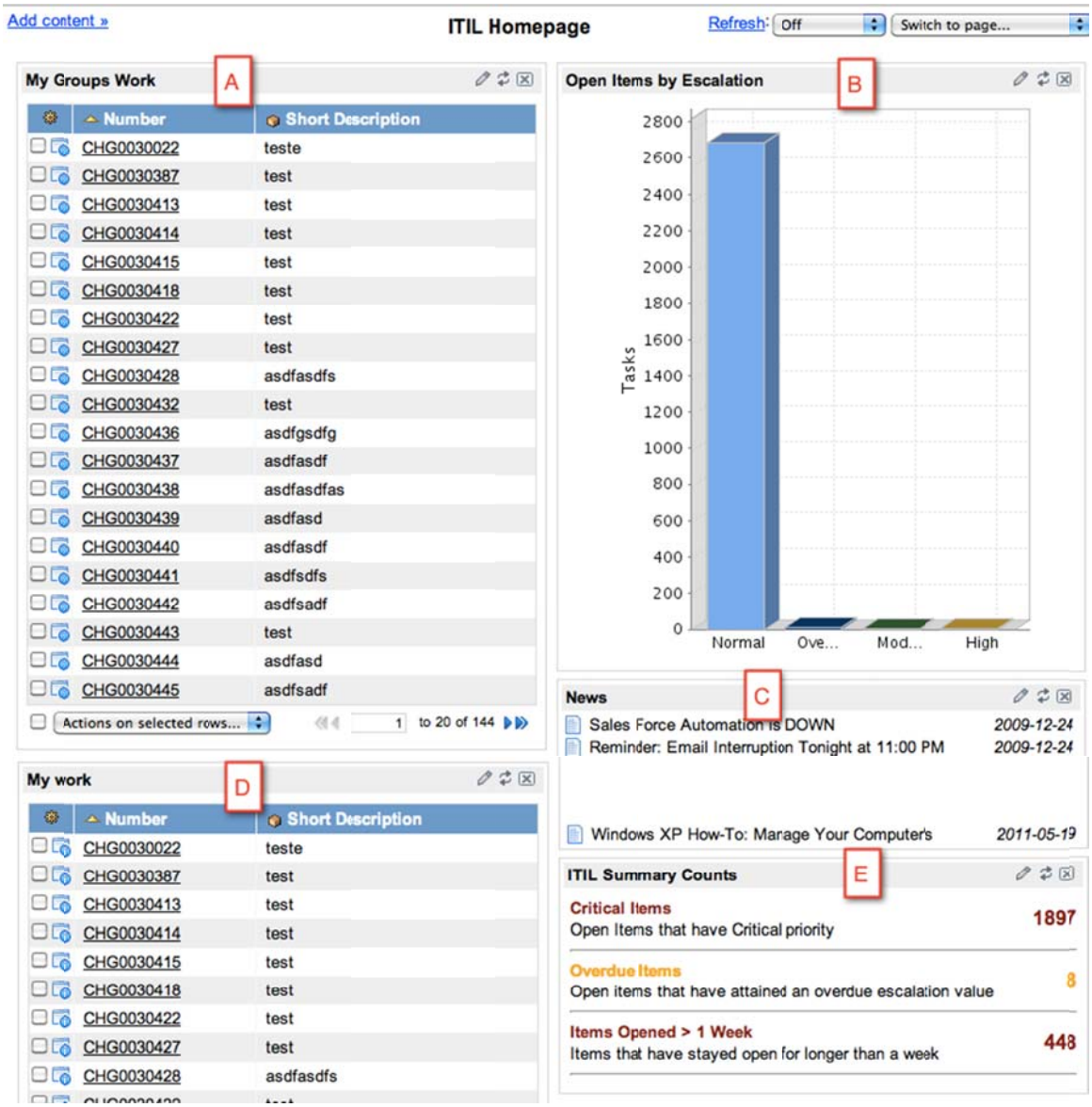
ServiceNow supports all current web browsers, including Internet Explorer, Mozilla Firefox, Google Chrome, Safari, and Opera. The only web browser that has had any reported issues is IE6, which is a far-outdated version of Internet Explorer.

Logging in to ServiceNow

Assuming users are logged into Yale’s network, they will be automatically logged in to ServiceNow. To access Yale’s ServiceNow website, simply go to: yaleproduction.service-now.com in the web browser if your choice. The user will be automatically logged in by the Yale’s Active Directory system

Homepage

When Logged in, users will be presented with the ITIL Homepage.



Homepage Content:

A. **My Groups Work**: A list of all work items that have been assigned to the logged in user's assignment groups

B. **Open Items by Escalation**: A bar chart of all open work items grouped by their escalation level

C: **News**: A scrolling ticker of all news items that have been published

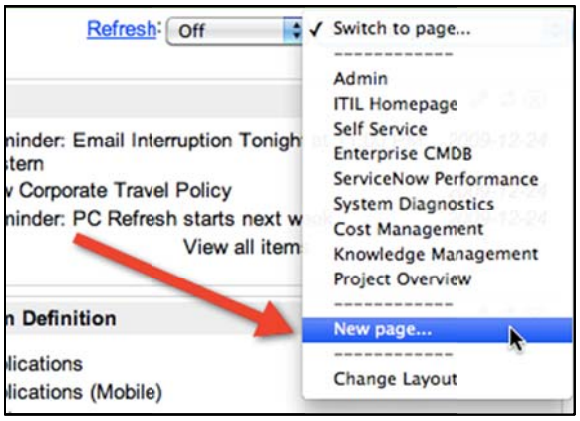
D: **My Work**: A list of all work items assigned to the logged-in user

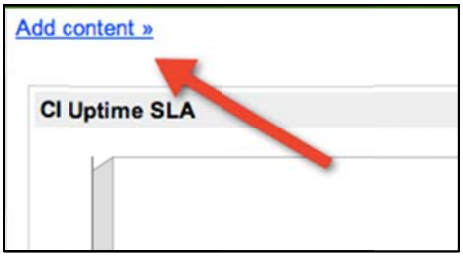
E. **ITIL Summary Counts**: A breakdown of work items based on three criteria: Open items that have a critical priority, open items that have attained an overdue escalation value, and items that have stayed open longer than a

Editing Homepage Content

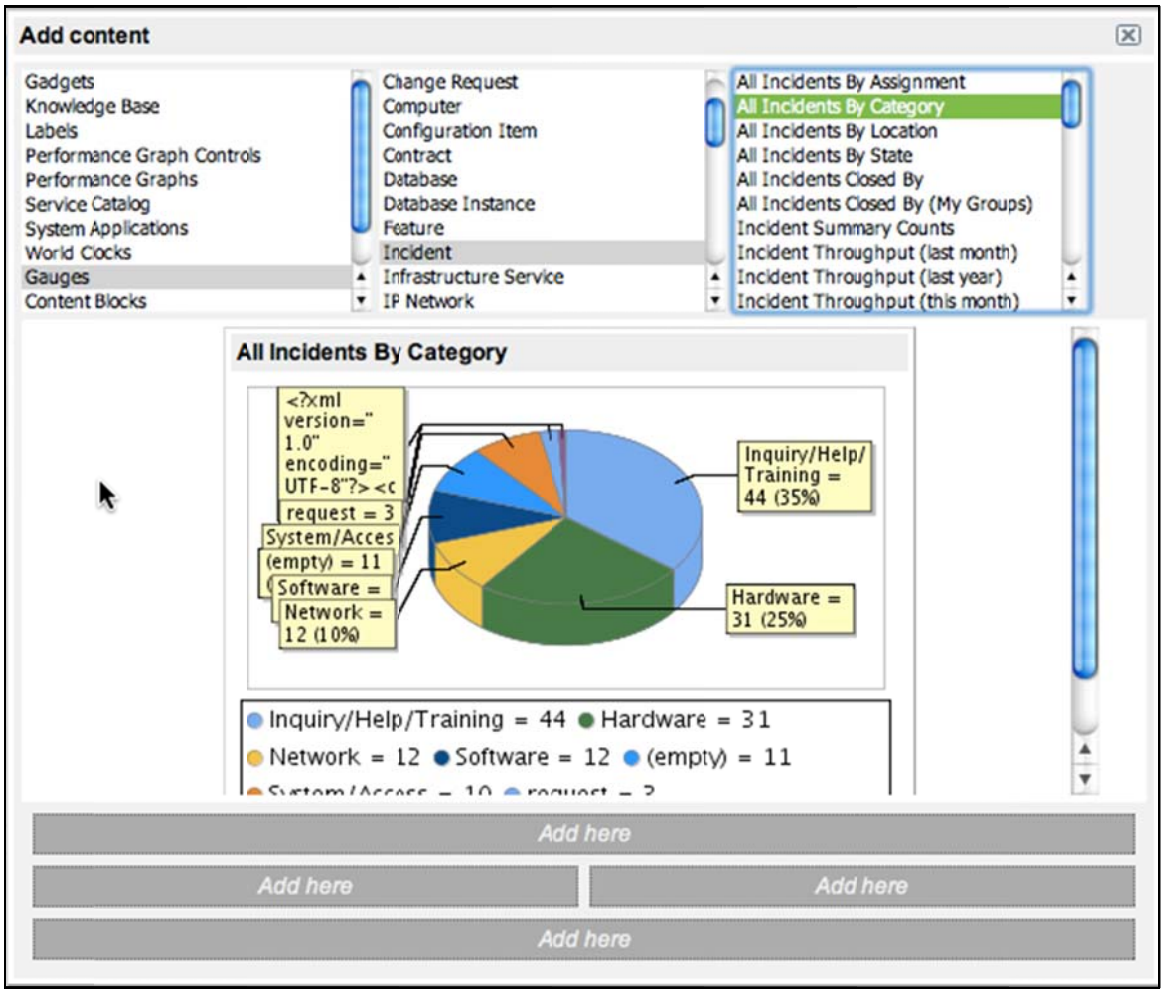
Users can create and edit their own homepages. To do this:

1. On the home page, click the “Switch to page…” drop down and select “New Page”
2. On the new page, select the “add content” link. This brings up the add content screen





To create content using the add content screen:



1. Select the kind of content the user wants in the first column (gauge, performance graphs, etc
2. Select the data source in the second column
3. Select the specific grouping of data in the third column (not all content will use the third column)
4. The content you have “created” will display right below the three columns. This will allow users to preview before they commit to adding something to a homepage
5. Click one of the 4 “add here” buttons to add that content to the homepage
6. When done, click the [x] button in the upper right corner

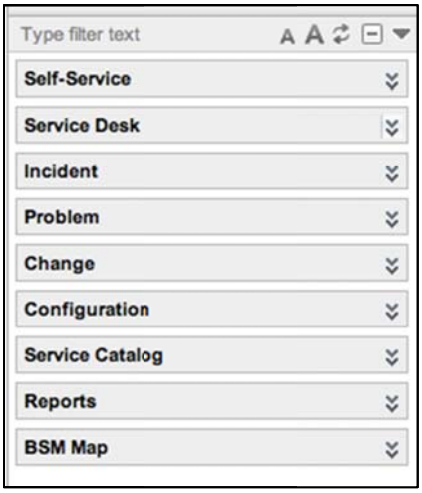
Note about Content: All content on homepages are dynamic. Users can click parts of graphs to see a list of the data represented in the graph. In the picture above, the user could click the green portion of the pie chart, the 31 Hardware incidents, and see a list of those 31 incidents.

To name the users new homepage, they simply need to click the title and change it to whatever is appropriate for them

To remove content from a homepage, simply click the small [x] in the upper right corner of every content block.

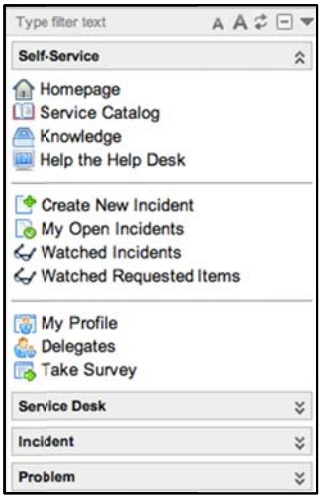
Left-Hand Navigation Toolbar

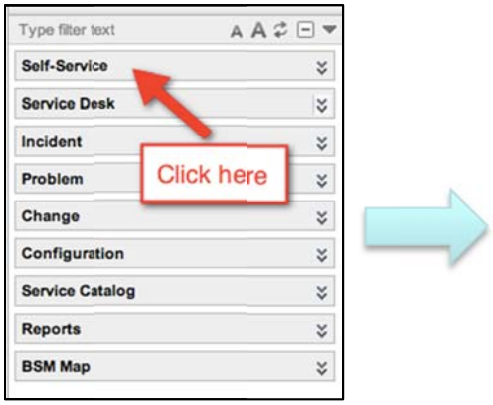
On the left of the screen, the user will find the left hand navigation toolbar. Regardless of what the user is doing within ServiceNow, the left-hand toolbar will always be present.

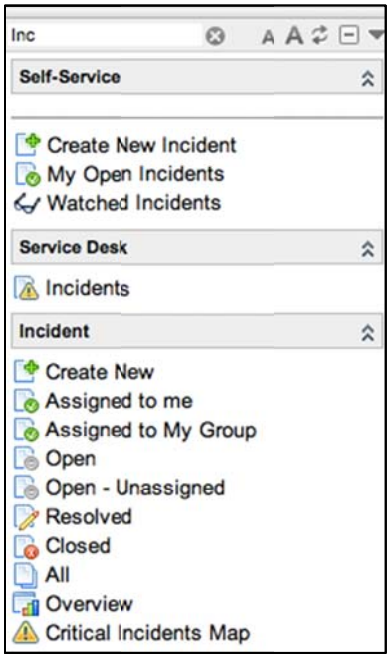


This toolbar will show all the applications the logged-in user has access to.

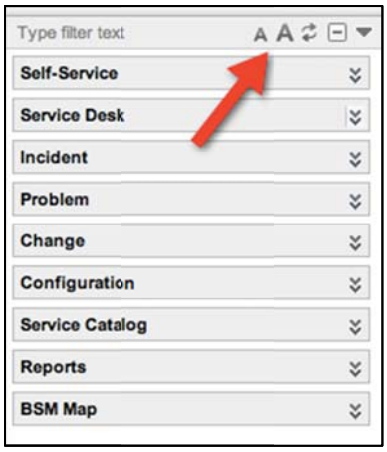
Users can click the header of each application to expand/collapse it.







At the top of the toolbar is the filter text box. This is a dynamic text box that will filter out all contents of the search bar that do not have the search terms. Example: If the user types in “Inc” in the textbox they will see Create New Incident, My Open Incidents, and Watched incidents under the Self-Service application, Incidents under the Service Desk application, and the entire Incident application.



Additionally, at the top of the tool-bar the user the user will see 3 different buttons.

Clicking the smaller A will make all text one font size smaller, and the larger A will make all text one font size larger. Users do not need to re-adjust the font size every time, their settings will be saved after they do it.

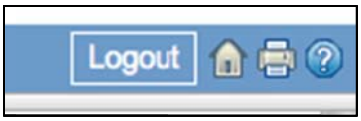
The button immediately to the right of the larger “A” (a circle made from two arrows) is the refresh button. This will refresh the contents of the navigation toolbar.

Clicking the square with a line through it will collapse all applications (as they appear in the picture to the right). Clicking it again will turn it into a “+” sign, which will expand all applications.

The downward-pointing triangle button has two functions. First, it will show all roles the user has assigned to them within ServiceNow. Second, it will allow the user to “select” that role and only view applications that specific role applies to.

ServiceNow Header

The header of ServiceNow has additional buttons in the upper right corner.



Logout: The logout button will log the user out of ServiceNow
Home Icon: The home icon, if clicked, will take the user back to the last homepage visited. In addition, if the user “hovers” over it with their mouse, they will see a list of homepages they can select.
Printer Icon: Will pop-up a new, printer friendly version of the current page
Help Icon: Will open a new web page/browser tab and take the user directly the ServiceNow wiki

UI

On the far left of the page, users will see a thin bar that runs the whole length of the screen. This is the UI bar.

The top two buttons are the screen expanders. The button on the left will collapse the left hand tool-bar from view, and the one on the right will collapse the top header from view.

The next two buttons are the split screen buttons. Clicking the button on the left will divide the screen into two pages vertically. Users will be able to have homepages or lists open on the left screen and items opened from lists (ex: incidents, problems, etc) on the right. The right button will split the screen horizontally, with the homepages/lists on top, and forms on bottom. Clicking either of these buttons again will undo the split screen.

The Star button will display a list of all booked marked items. Users have the ability, from list views, to click and drag individual records over to the bookmark bar. They can then click these links to go directly to that record.

To edit a bookmark: Go to the Star button and select the gear next to the bookmark you want to edit. Users can also hover over the bookmark and select edit bookmark.

Editing Lists

Column Sorting

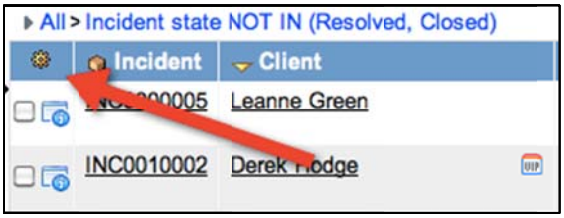
When looking at list of items, like “Open” Incident list, users can sort columns. To do this, simply click the column header by which the user wishes to sort by. The column being sorted by will have a small yellow triangle on it.

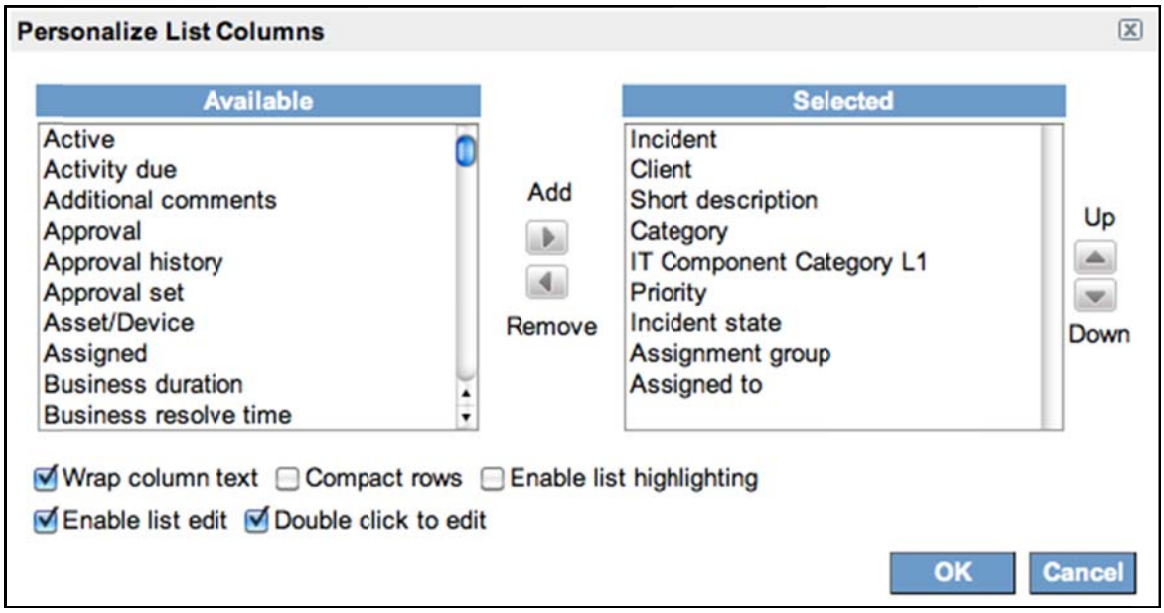
Example: The first picture is being sorted by Number, the second is being sorted by Client Item. Both lists are the exact same lists, just sorted differently.

Personalized Lists

Another useful way for users to find work and view their work is via Personalized Lists. Users can change how lists appear to them three ways. The second is personalizing a list.

All lists, in the upper left corner, have a gear button. Pressing this brings about the personalized list options screen:

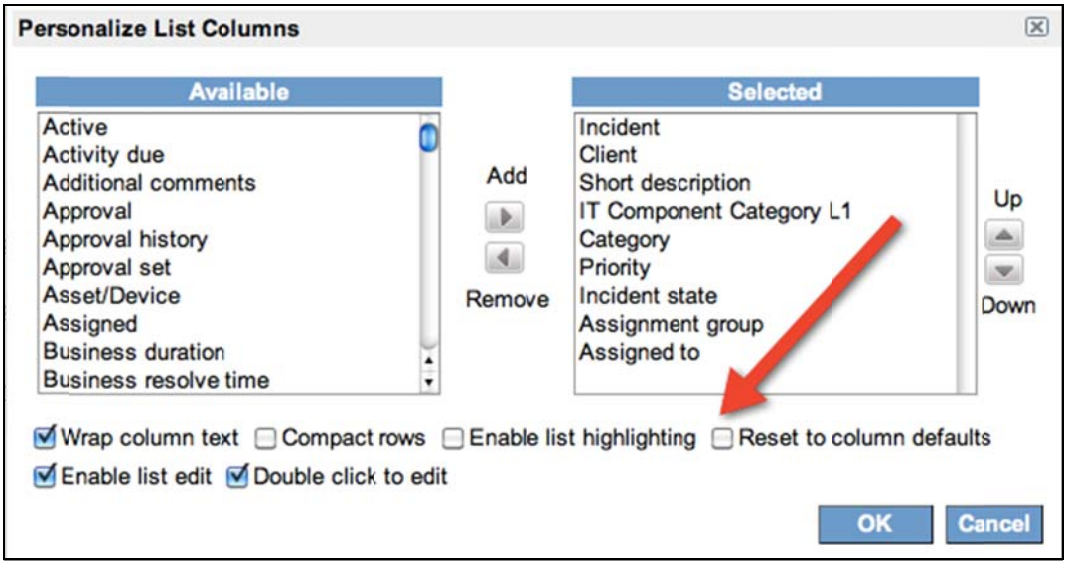




The fields in the “Selected” column are the fields that will be the column headers on your list. To change these:

1. Find the field you want to add from the “Available” column on the left
2. Select it, and then click the “Add” button in the middle
3. The field will automatically be added to the bottom of the selected, meaning it will be the last column on your list. Select it and hit the up or down buttons to rearrange your list order
4. Similarly, you can remove fields from the Selected column using the remove button in the middle
5. Once satisfied with the content of the Selected column, click OK to confirm or cancel
6. This will change how that list appears to you, and will remain that way until the user changes it or an admin restores defaults

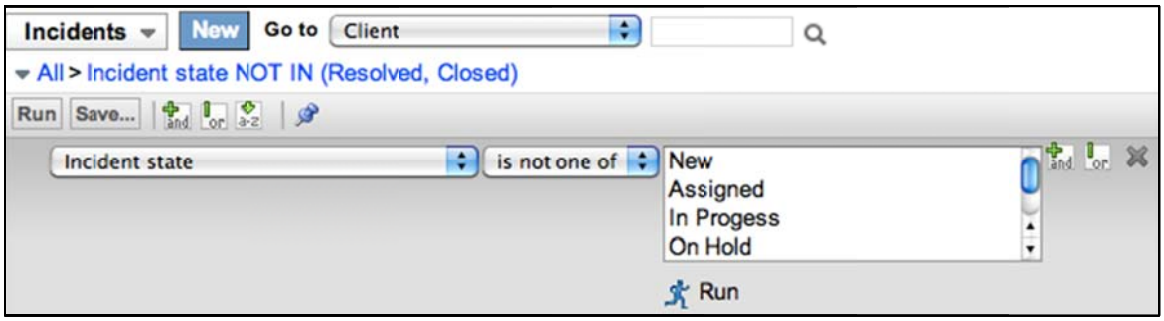
To restore a list to default settings, click the gear again and check the “Reset to column defaults” box and hit OK



Customized Filters

The final method of adjusting a list view is creating a customized filter. To do this:

1. Click the grey right-pointing triangle at the top of any list
2. This will bring up the run filter screen (and display any filters that are currently running)



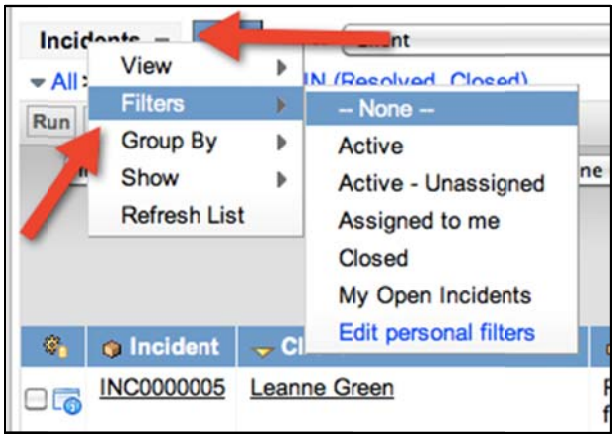
To create the filter:

1. Choose the field you wish to filter (this can be any field available, not just the fields that are the list's column header)

2. Choose the operation. Ex: “Is”, “Greater than”, “Contains”
3. Choose the value. This should be criteria by which you are looking to sort that initial field by
4. Once the user is satisfied with the filter criteria, then click Run

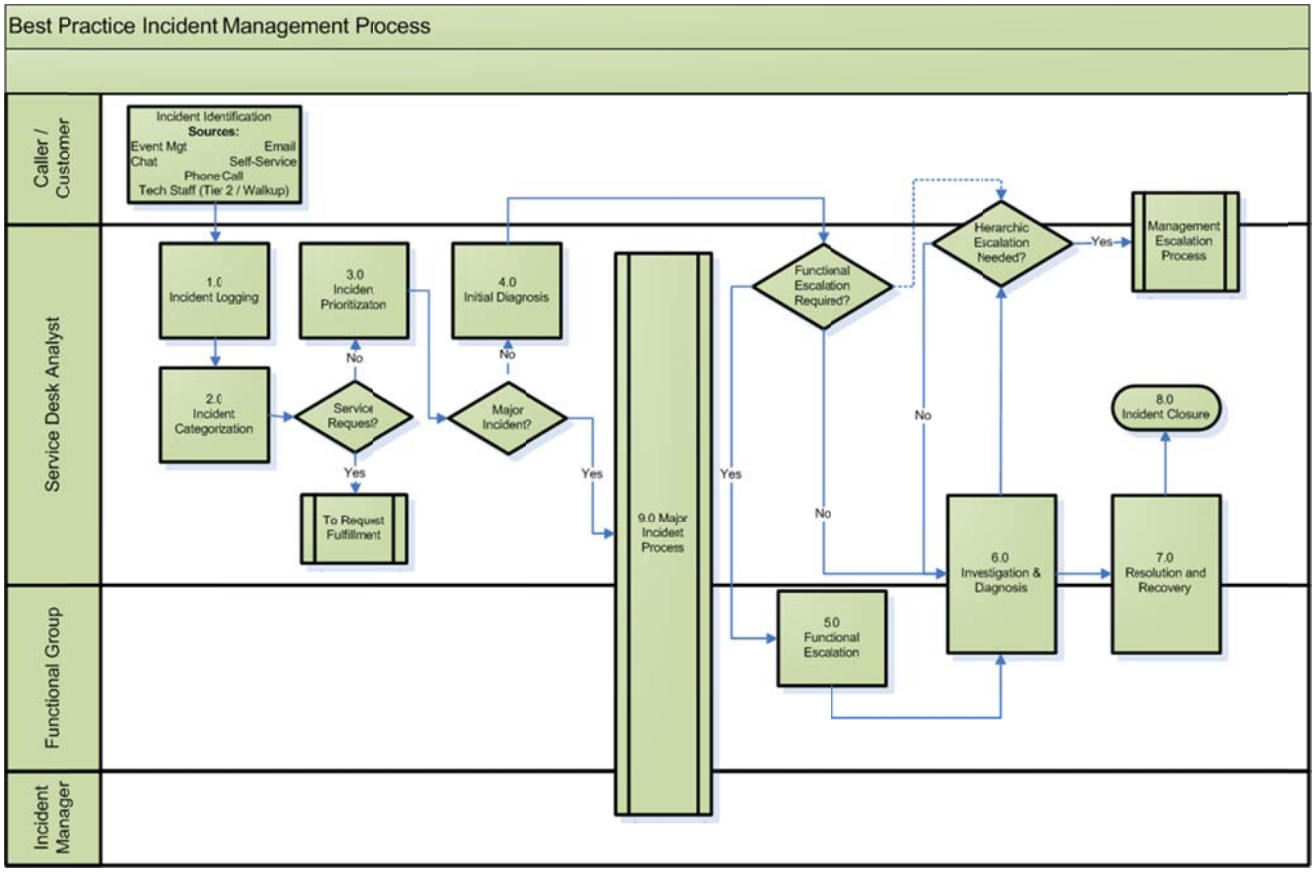
Notes about filters:

- The user can choose to run multiple filters at once. At the top of the filter screen, simply click the “and”, “or”, or “a-z” buttons to add another filter
    - “and” will filter assuming that BOTH criteria you search are met
    - “or” will filter assuming EITHER criteria you search are met
- Users can save filters. If a user finds a particular filter is particularly useful to them, they only need to click the “Save Filter” button. The user will need to Name the saved filter, and then click save.
    - Their save filters can be found clicking the drop down at the top of the list



Incident Process

High-Level Process



RACI Chart

A RACI chart stands for Responsible, Accountable, Consulted, and informed. The RACI clearly lays out what roles own every part of the incident process.
Responsible: Those who do the work to achieve the task
Accountable: The one ultimately answerable for the correct and thorough completion of the deliverable or task
Consulted: Those whose opinions are sought, typically subject matter experts
Informed: Those who are kept up-to=date on progress, often only on completion of the task or deliverable

Process / Procedural Step	Caller / Customer	Service Desk Analyst	Service Desk Site Lead	Incident Manager	Situation Manager	Functional Group – Queue Manager	Functional Group – Tier 2+ Analyst	Incident Process Owner	Incident Coordinator
1.0 Incident Logging	C	R		A			R		
2.0 Incident Categorization	C	R		A			R		
3.0 Incident Prioritization	C	R		A, C, I					C
4.0 Initial Diagnosis		R		A, C, I			R		
5.0 Functional Escalation		R		A, C					
6.0 Investigation & Diagnosis						A	R		
7.0 Resolution & Recovery	I	R		A			R		
8.0 Incident Closure	C	R	R	A			R		
9.0 Major Incident Process				A	R	R			R
Process Maturity and Evolution	C, I	C	R	R	C	R	C	A	

Main Roles

Service Desk Analyst

The service desk analyst has these 5 main functions:

- Log incidents
- Provide initial diagnosis
- Resolve incidents at first point of contact if possible
- Escalate incidents
- Own non-major incidents

In the incident process, they are responsible for the following process steps:

1.0 Incident Logging
2.0 Incident Categorization
3.0 Incident Prioritization
4.0 Initial Diagnosis
5.0 Functional Escalation
7.0 Resolution and Recovery
8.0 Incident Closure

They are consulted in the following process steps:
Process Maturity and Evolution

Service Desk Queue Manager

The service desk queue manager has these main functions:

- Assigns incidents to individual Tier 2+ Analysts in the functional group
- Monitors and manages support resolution performance
- May directly manage (reporting manager) the day to day activities of Tier 2+ analysts outside of process activities

In the incident process, they are responsible for the following process steps:

9.0 Major Incident Process
Process Maturity and Evolution

They are accountable for the following process steps:
6.0 Investigation and Diagnosis

ServiceNow Roles

Within ServiceNow, there are two main roles, ITIL and Reporting. The ITIL Role gives users access to the processes within ServiceNow. It will allow them to create tickets and send them through the entire process.
The reporting role will allow users to create reports. This will be essential in the final step of the process, Process Maturity and Evolution.

Describe the two main roles:
Include what tasks do they perform in the process
How do the RACI roles collapse into the two roles in SN?
Service Desk Analyst
Service Desk Queue Manager

Policies

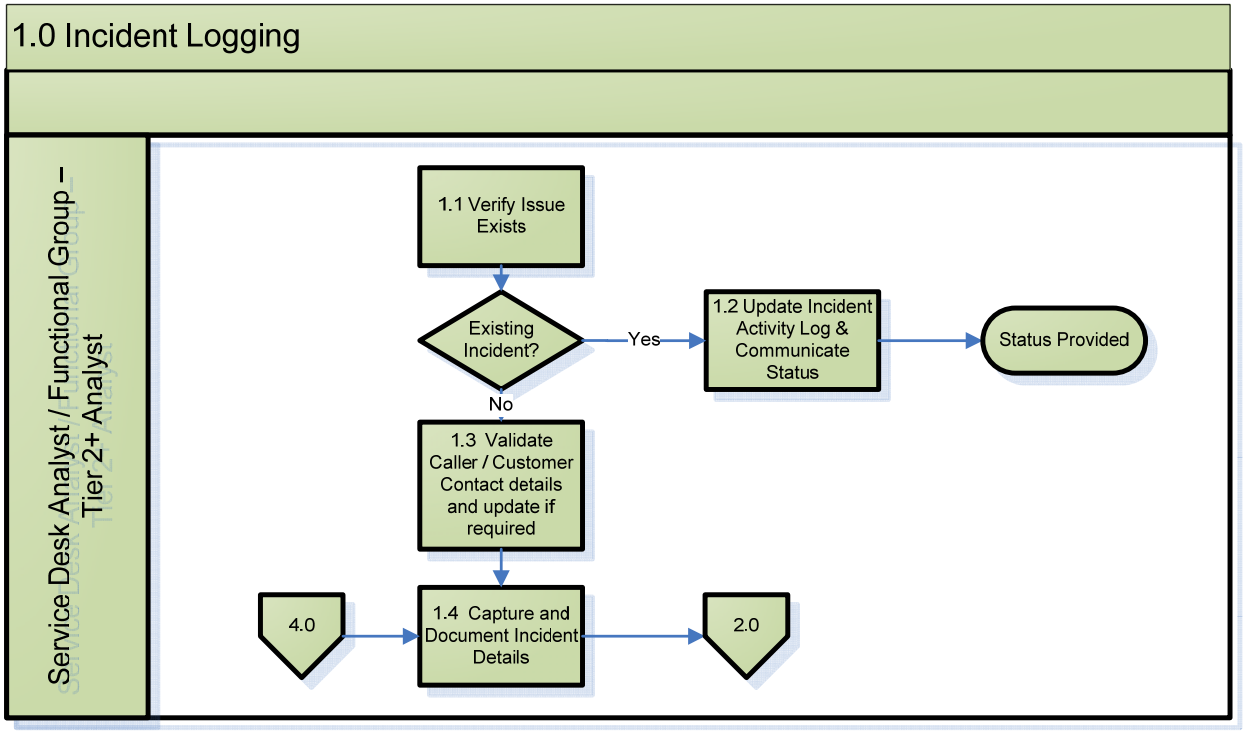
Policies help define and ensure the Incident Management process achieves its objective and adheres to the defined process.

Policy Statement
Incident reporting must go through the Service Desk, providing Users with a single point of contact
All incidents must be logged, prioritized and solutions recorded in the Incident Management System
One standard Incident Management Process is defined and used to support all IT Service users
The Service Desk manages, tracks, escalates, closes and communicates status of all incident records and is responsible for all incident assignments
The Incident Management Process is the conduit of communication of any degradation of service, to the affected users and IT personnel
Closure of incidents is dependent on validating with the user that the incident has been resolved and service is restored
The Service Desk will own all incidents that they themselves log or that are assigned to them from a Tier 2 provider. Ownership will transfer to the Incident / Situation Manager for major incidents

Once a major incident has been validated by the Service Desk, escalation and communication protocols for high-priority incidents are initiated and managed by the Service Desk

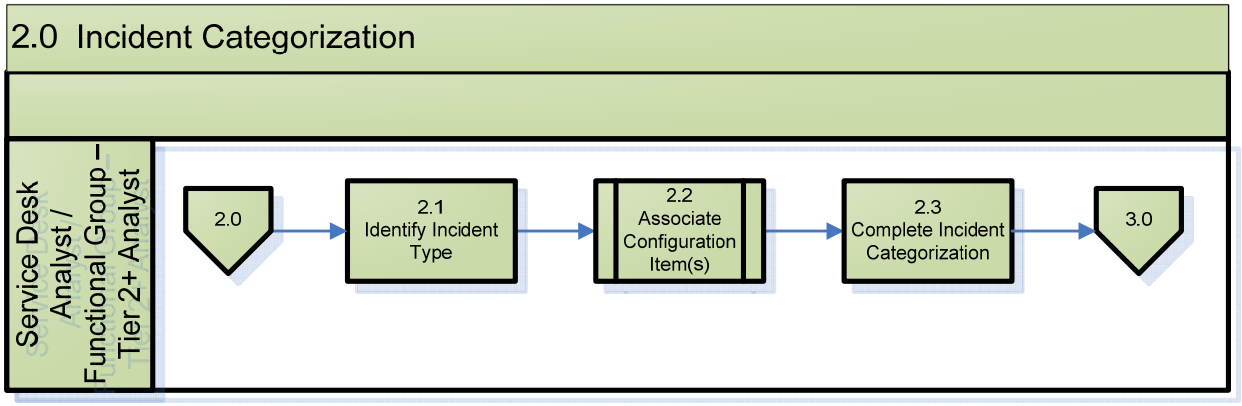
Process Procedures

1.0 Incident Logging



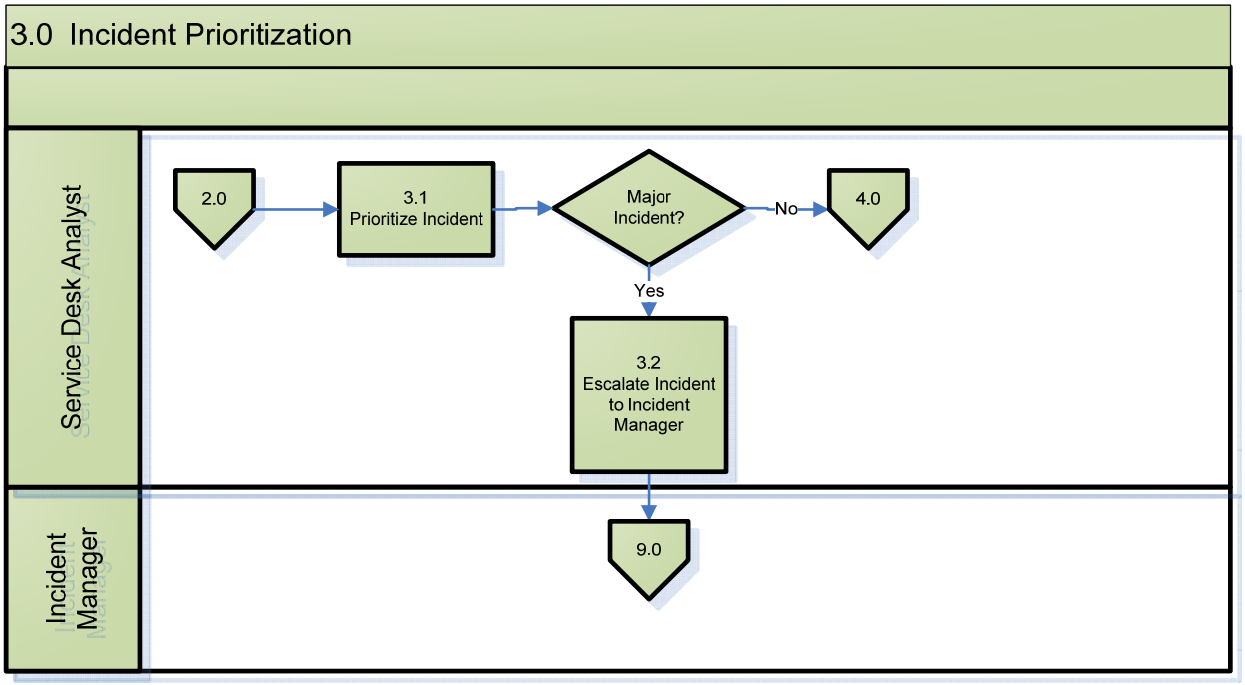
1.1 Verify Issue Exists	Take steps to validate or replicate the interruption. Gather any data about the issue (screenshots, descriptions). Associate to any concurrent incident (e.g. major outage).
1.2 Update Incident Activity Log & Communicate Status	If the Caller is inquiring about status of an existing incident, provide the caller with status as available in the incident record and update the record indicating that the caller was inquiring and update with additional details if available.
1.3 Validate Caller / Customer Contact details and Update if Required	Complete caller data and ensure contact details are accurate and update if necessary.
1.4 Capture and Document Incident Details	Complete the short and long description, ensuring they are clear and can be understood by others. Collect incident symptoms.

2.0 Incident Categorization



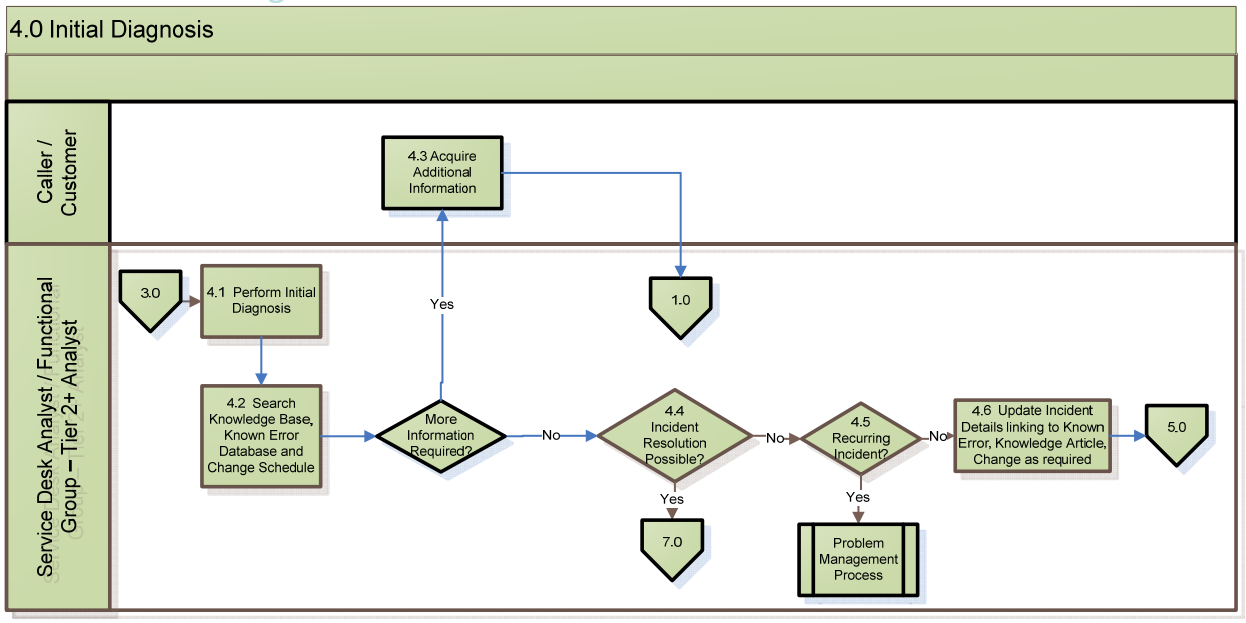
2.1 Identify Incident Type	Capture the incident type based on the customer-reported symptoms.	
2.2 Associate Configuration Items(s)	If a Configuration Management System (CMS) is present, associate the incident to the Configuration Item(s) (CI) diagnosed to have failed and are causing the incident. Note, IT Business and Provider Services may be captured as CI's, if implemented.	If there is no CMS present, capture the device name or ID, and based on the primary failed device, capture the component categorization.
2.3 Complete Incident Categorization	Capture IT Business Service categorization, as defined by the customer. Based on the symptoms and incident diagnosis, capture the IT Provider Service categorization.	

3.0 Incident Prioritization



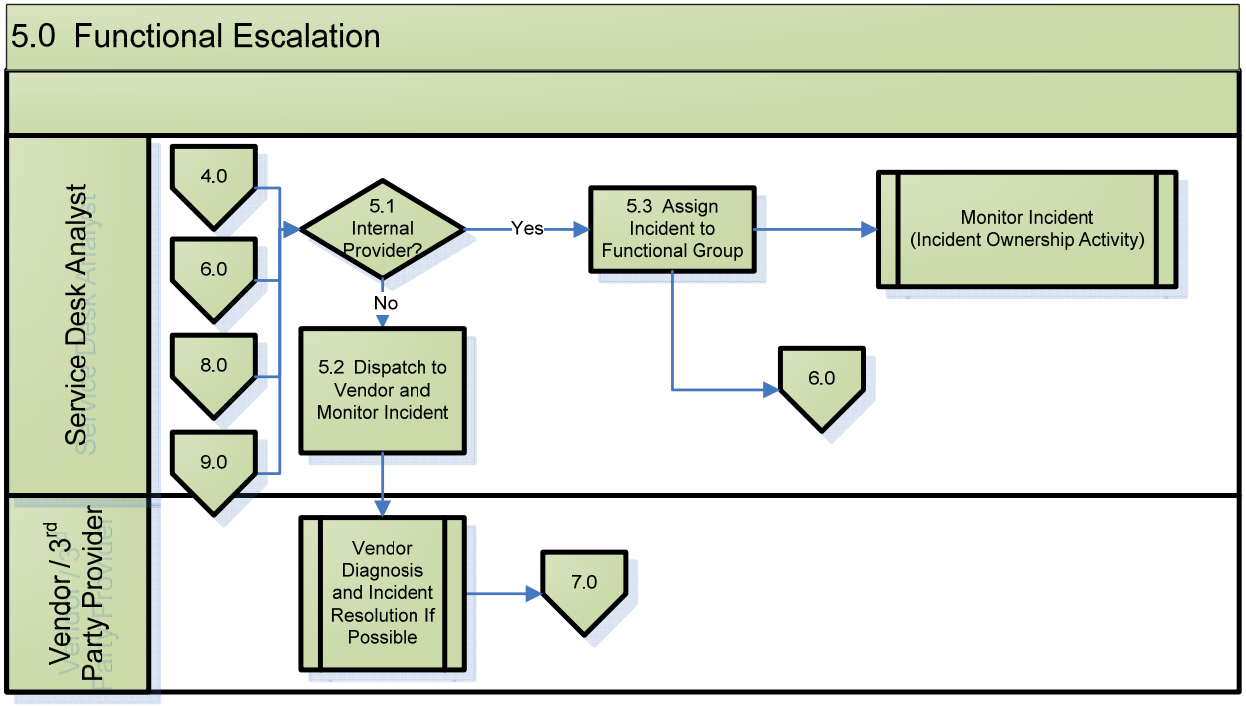
3.1 Prioritize Incident	Select the impact and urgency of the Incident according to guidelines if it is not present. This will determine the priority. If priority-based service level monitoring is enabled, the selected priority to define the response and resolution time service level targets for the incident. If service-based monitoring is enabled, the selected priority will only define the response time service level targets for the incident. If the reported service does not have any restoration service level targets defined, a generic priority-based restoration service level target may be used.
3.2 Escalate Incident to Incident Manager / Situation Manager	Determine if this is a major incident. If so, the service desk agent will escalate to the incident manager accordingly.

4.0 Incident Diagnosis



4.1 Perform Initial Diagnosis	Document all trouble-shooting steps within the incident record.
4.2 Search Knowledge Base, Known Error, Database and Change Schedule	Use initial diagnosis details to search the knowledge base for relevant knowledge. Also check the known error database to see if a workaround exists and the change schedule to see if this is issue could be related to a recently implemented change. Ensure the incident record is coded appropriately.
4.3 Acquire Additional Information	If additional information is required, contact the customer. If the customer cannot be reached, place the incident on hold.
4.4 Incident Resolution Possible?	If a resolution is possible, proceed to step 7.0 Resolution and Recovery. If resolution is not possible, the incident may need to be assigned to a functional group for resolution.
4.5 Recurring Incident?	Determine if other incidents of the same nature have been experienced. If others exist and no root cause has been determined, this may be a good candidate for problem management.
4.6 Update Incident Details linking to Known Error, Knowledge Article, Change as required	Confirm that the incident record is updated and coded according to the diagnosis steps. Selection of a knowledge record may update (e.g. provider service, component category, urgency) incident categorization and details.

5.0 Functional Escalation



5.1 Internal Provider? If assignment is necessary, determine if the functional group that is equipped to resolve the incident is an internal support group or an established external partner that has a support agreement and process established for incident resolution.

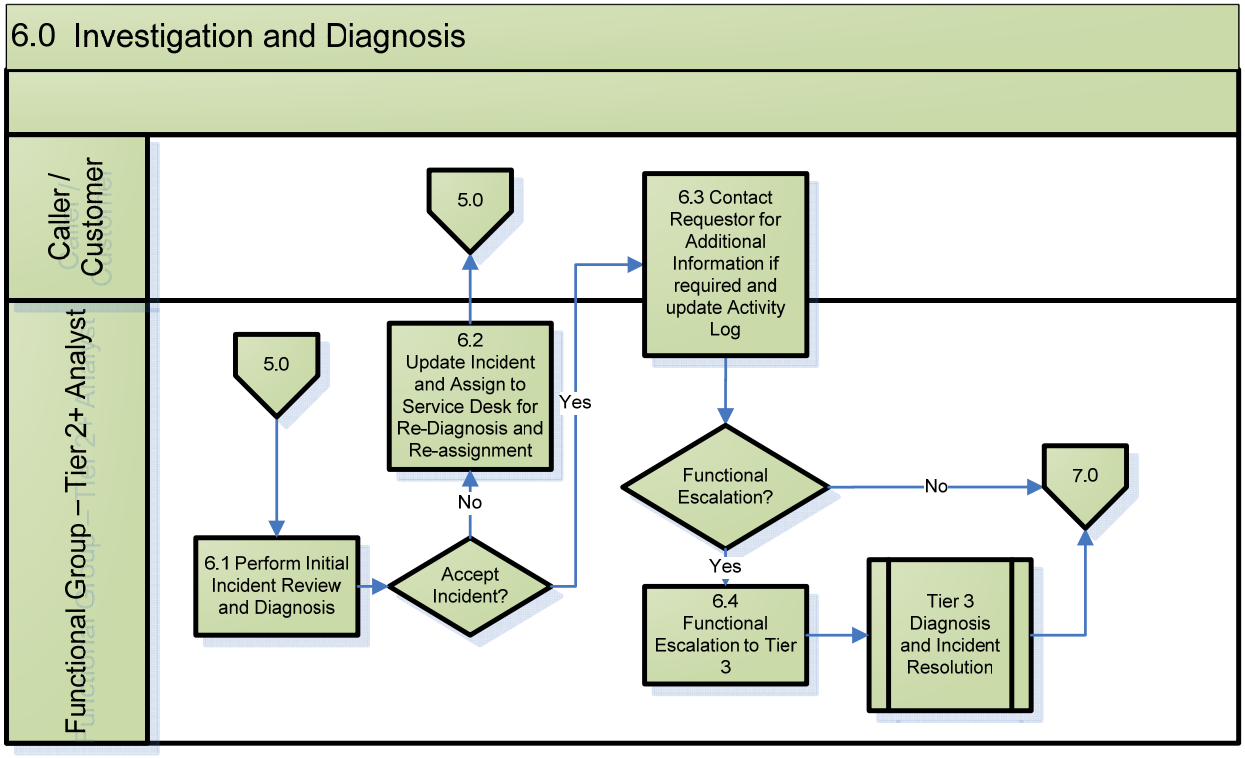
5.2 Dispatch to Vendor and Monitor Incident If the functional group is an external group, ensure that the established incident process is followed.

5.3 Assign Incident to Functional Group If the functional group is an internal group, determine the proper group for assignment and assign it to the Group.

5.4 Monitor Incident Optimally, the Service Desk owns the monitoring of incident to resolution and closure. Guidelines for ownership/monitoring include:

- Providing customers with desk contact info for updates
- Progress notifications originate from a desk monitored email account
- Incidents that have not been accepted within response time targets should be initially escalated to the assignment group manager, and ultimately to the Incident Manager if required
- Ownership of major incidents should be transferred to the incident manager/ situation manager

6.0 Investigation and Diagnosis



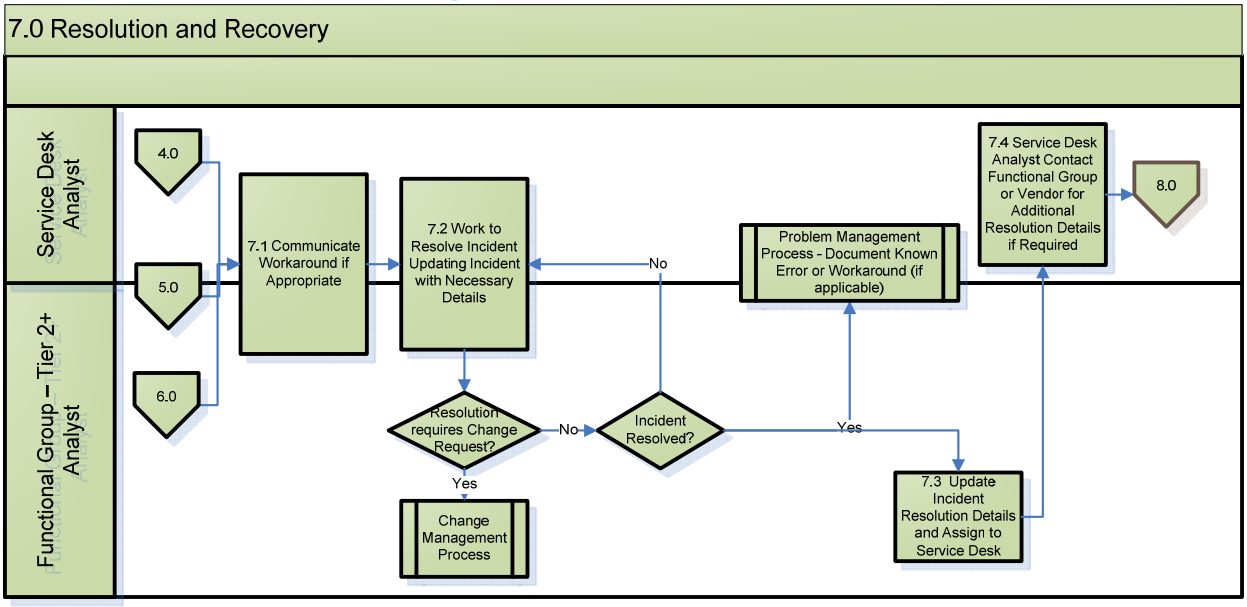
6.1 Perform Initial Review & Diagnosis — Perform initial review to determine if the incident has been properly assigned.

6.2 Update Incident and Assign to Service Desk for Re-diagnosis and Re-assignment — If the incident was improperly assigned, the Functional Group assigns it back to the Service Desk for further diagnosis and assignment.

6.3 Contact Requestor for Additional Information if Required — If assignment is proper, accept the incident (work in progress) and determine if further information is required contact the customer to obtain then proceed to step 7.0 Resolution and Recovery.

6.4 Functional Escalation to Tier 3 if required — If the incident requires further assignment to Tier 3 or an external Vendor, the Functional Group is responsible to work with the external partners and maintain oversight of the incident record.

7.0 Resolution and Recovery



7.1 Communicate Workaround if Appropriate

Investigate sources of information to see if a workaround exists. Check relevant knowledge, known error database, problem records, etc. and provide the work around to the customer.

7.2 Work to Resolve Incident Updating Incident with Necessary Details

If no workaround exists, begin resolution activities making sure to update the incident record with all details related to resolution activities.

If resolution requires that a change be introduced, a Request for Change must be submitted and flow through the Change Management Process.

7.3 Update Incident Resolution Details and Assign to Service Desk

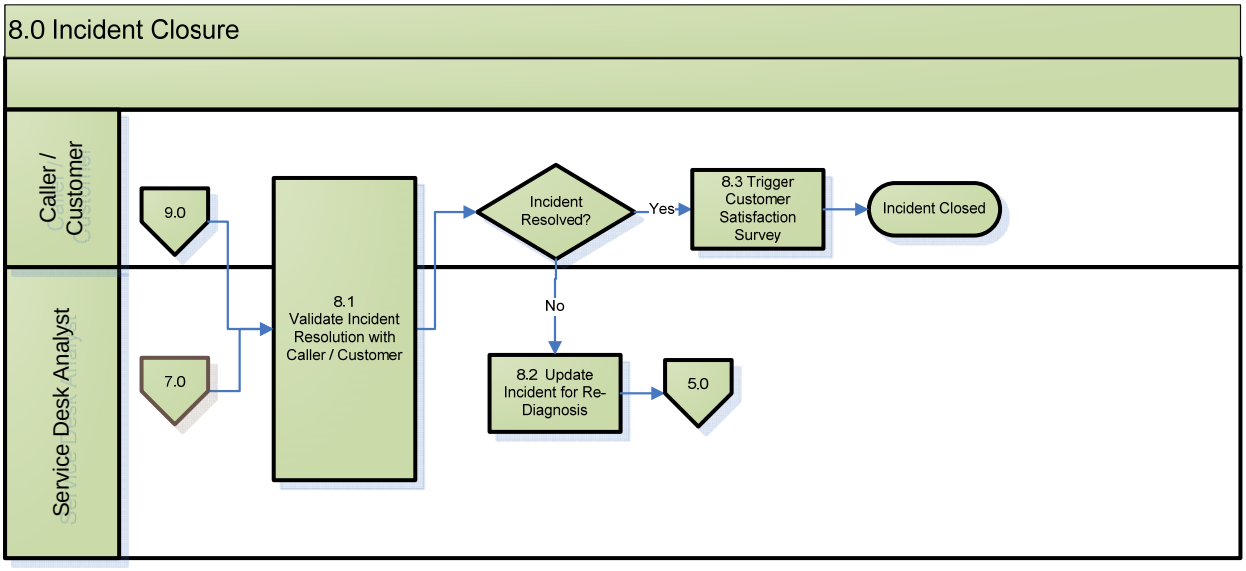
Once the incident has been resolved it is good practice to review the solution and determine if knowledge could be authored for future occurrences, or if there is a systemic issue that needs to be addressed through the Problem Management Process.

Upon resolution, the incident is updated with the proper resolution information and coding, and is assigned to the Service Desk for final closure activities.

7.4 Service Desk Analyst Contact Functional Group or Vendor for Additional Resolution Details if Required

In preparation for closure activities, review the incident details to ensure it is completed properly and has the appropriate resolution details.

8.0 Incident Closure



8.1 Validate Resolution with Caller / Customer

Follow proper procedures to validate with the Customer that the incident has in fact been resolved. If it has been resolved, the incident will be closed according to procedures.

8.2 Update Incident for Re-Diagnosis

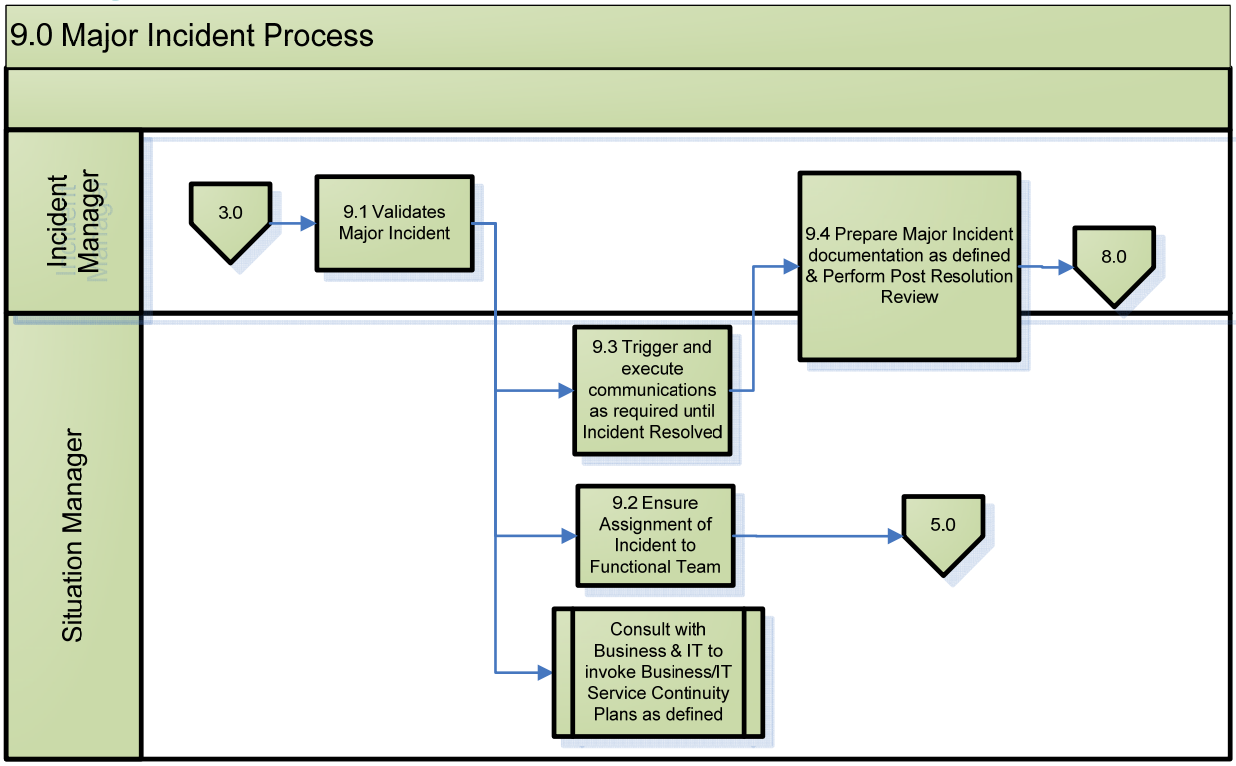
If the Customer indicates that the incident has not yet been resolved, it must be sent back for further diagnosis before the incident is closed.

NOTE: If the incident is in a closed state when the customer indicates it was not resolved, a new incident should be opened and associated to the original incident.

8.3 Trigger Customer Satisfaction Survey

Once the customer has confirmed resolution and the incident is in process of being officially closed, a customer satisfaction survey is to be provided to inform future improvement opportunities.

9.0 Major Incident Process



9.1 Validate Major Incident

If an incident is escalated to a "Major Incident" status, the Incident Manager must first ensure that it should be treated as a Major Incident and be given the enhanced communication and management attention that a Major Incident requires.

9.2 Ensure Assignment of Incident to Functional Team

Ensure that the incident has been assigned to the appropriate team for resolution and works with the management structure to coordinate a cross-functional team to address the situation if needed and where the underlying issue is unclear.

9.3 Trigger and execute communications as required until Incident Resolved

Ensure that the communication is planned and executed according to internal procedures and triggers. At a minimum communication is to be shared at the beginning and end of a Major Incident and perhaps at specific intervals throughout the resolution process. This communication can be to either internal IT stakeholders or Customers or a combination of both.

9.4 Prepare Major Incident documentation as defined & Perform Post Resolution Review

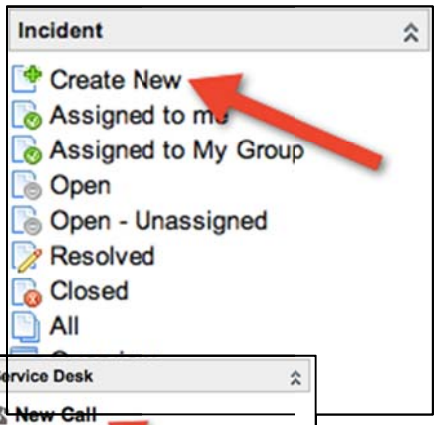
Upon resolution of a Major Incident, documentation must be prepared that summarizes the issue, actions taken and resolution details. It should also trigger root case analysis if required and allow for improvements that can be made to avoid the situation in the future.

Incidents

Creating New Incidents

To create new incidents:

1. Navigate to the left hand toolbar and find the incident application
2. Click the “Create New” link

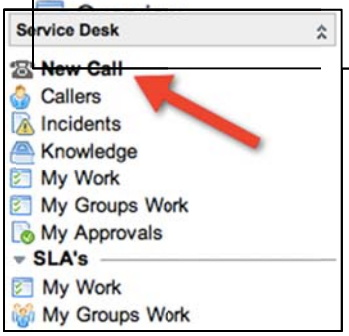


This will take the user to the new incident form

New Call

Users have the ability to create incidents from new calls. To do this:

1. Navigate to the Service Desk Application
2. Select New Call



The user will be taken to the new call screen.
The new call screen has 5 fields:
Caller: Can use NetID or Search
Location: Location of the incident, can use search
Comments: Text field for comments
Call type: radio buttons for whether it is an Incident or Service Request
Short Description: Short text field for a brief description of the incident.

Note: Determining between an Incident and Service Request
Incident are when a service has been disrupted. Whenever something is broken, this indicates it is an incident.

A service request is when someone is Requesting something, be it a physical item like a laptop or information like a database query.
Once the user hits the submit button, an incident ticket will be created and automatically assigned to the Service Desk.

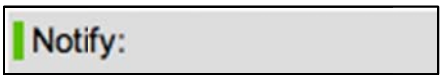
Field Basics

Users may notice some fields have colored bars next to the left of them. These colors indicate various conditions:

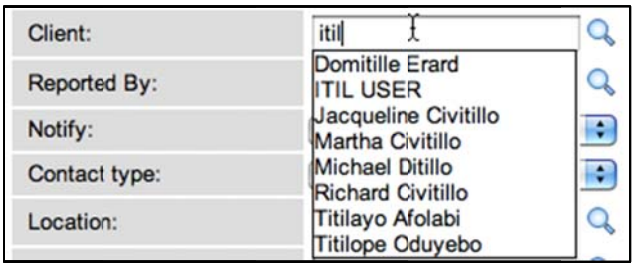
Red: Indicates the field is required. The ticket cannot be saved or updated if there is not a valid value in the field.

Yellow: Indicates the field is auto-generated based on other conditions. For example, the incident number is auto-generated by ServiceNow when the ticket is created. Reopened is automatically checked when the moves from the "resolved" to "active" state.

Green: Indicates the field has recently been changed, and the ticket has not yet been saved. This will let users see what they have changed before saving a ticket.



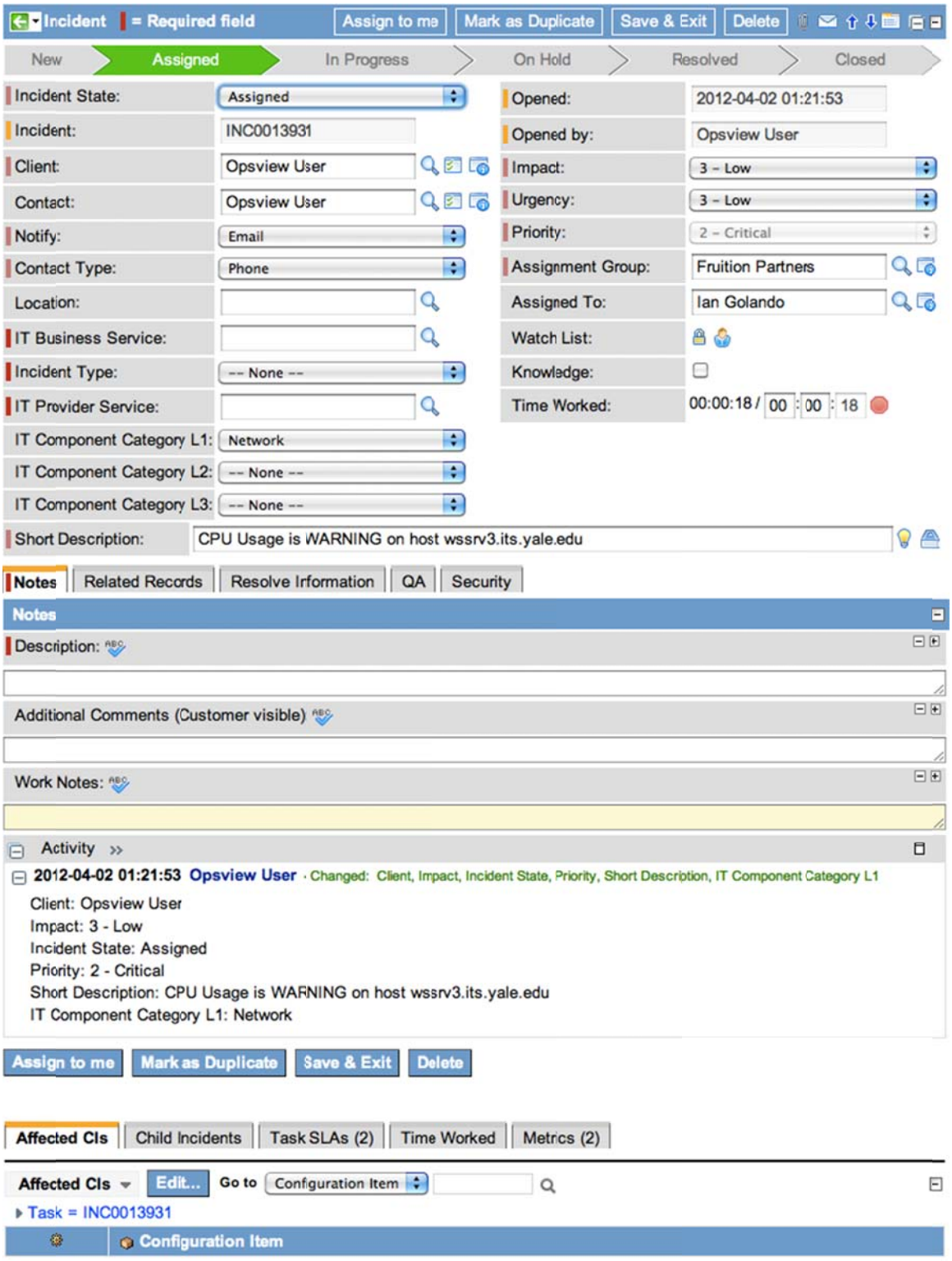
Users may also notice a magnifying glass next to some fields. This indicates the field is a reference field. Users have two options:



1. Type directly into the field, to get a google-like search that dynamically shows all valid entries with the terms entered.
2. Click the magnifying glass to bring up the table the field references

Incident Form

The Yale Incident form:


Incident
= Required field
Assign to me
Mark as Duplicate
Save & Exit
Delete
New
Assigned
In Progress
On Hold
Resolved
Closed
Incident State: Assigned
Incident: INC0013931
Client: Opsview User
Contact: Opsview User
Notify: Email
Contact Type: Phone
Location:
IT Business Service:
Incident Type: -- None --
IT Provider Service:
IT Component Category L1: Network
IT Component Category L2: -- None --
IT Component Category L3: -- None --
Opened: 2012-04-02 01:21:53
Opened by: Opsview User
Impact: 3 - Low
Urgency: 3 - Low
Priority: 2 - Critical
Assignment Group: Fruition Partners
Assigned To: Ian Golando
Watch List:
Knowledge:
Time Worked: 00:00:18 / 00 : 00 : 18
Short Description: CPU Usage is WARNING on host wssrv3.its.yale.edu
Notes
Related Records
Resolve Information
QA
Security
Notes
Description:
Additional Comments (Customer visible)
Work Notes:
Activity
2012-04-02 01:21:53 Opsview User · Changed: Client, Impact, Incident State, Priority, Short Description, IT Component Category L1
Client: Opsview User
Impact: 3 - Low
Incident State: Assigned
Priority: 2 - Critical
Short Description: CPU Usage is WARNING on host wssrv3.its.yale.edu
IT Component Category L1: Network
Assign to me
Mark as Duplicate
Save & Exit
Delete
Affected CIs
Child Incidents
Task SLAs (2)
Time Worked
Metrics (2)
Affected CIs
Edit...
Go to
Configuration Item
Task = INC0013931
Configuration Item

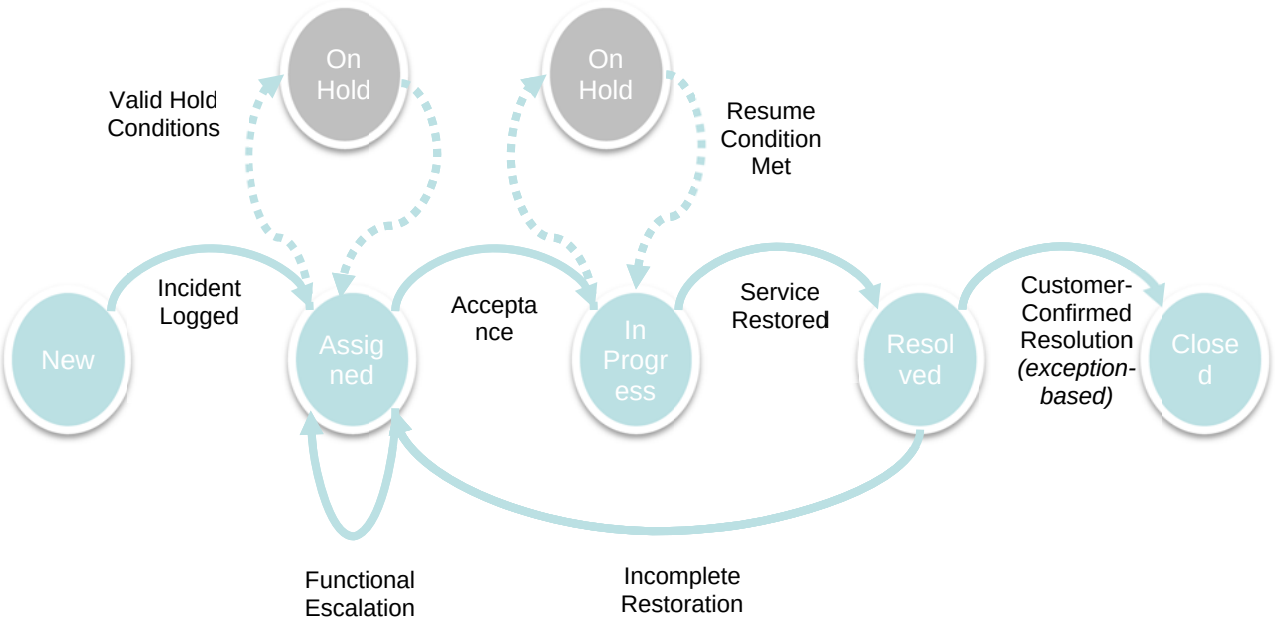
Incident States

Incident States allows for the capture of key process milestones. Each milestone represents an important point in time within the process that needs to be captured.

At the top of the incident form, the users will see the incidents states, with the current state highlighted. The incident will move through the various states via the following process:

New: When the incident is first created
Assigned: When the incident has been logged. Incidents may revert back to this state when reassigned to new groups. Also, if there is an incomplete restoration, the incident will revert from “resolved” back to “assigned”.
In Progress: When the incident has been accepted by the group
Resolved: When the service has been restored, as determined by the service desk
Closed: Customer has confirmed the incident has been resolved
On Hold: Indicates a valid on-hold condition has been met, and will pause SLA’s

Here is a graph to help visualize how incident states will progress.



Field Definitions

Incident State: The current status of the incident.
Incident: The unique incident number
Client: The user experiencing the issue. References the user table
Reported by: The user who calls in the incident, if not the same as the client. References the user table.
Notify: Used to determine if the user wants email notifications or not
Contact Type: How the user contacted the service desk

Contact Type	Description
Email	Incident created from email.
Phone	Incident called into a help/service desk.
In-Person	Tier 1 depot for in-person support, similar to Apple genius bar approach.
Chat	Incident created from or during a chat session.
Tier 2	Tier 2 created incident.
Self-Service	Incident created through a self-service console.

Location: The location of the incident
IT Business Service: The high-level business service affected by the incident (if applicable)(What the client identifies the issue as)
Incident Type: What kind of incident the user is facing
IT Provider Service: The high-level service IT provides that is affected (if applicable) (The actual technical IT service that is causing the Incident)

Categorization: Yale utilizes a 3-tier categorization scheme. This is one for several reasons:

1. Recognizes the need to capture service vs. technology details
2. Future-proofed for introduction of service asset and configuration management
3. Enhances value of reporting by defining IT service view in terms the business should understand

IT Component Category 1: The first of the categorization scheme, the high-level view.
IT Component Category 2: The second level of the categorization scheme, the values are dependent on Category 1

IT Component Category 3: The final level of the categorization scheme, the values are dependent on Category 2. There will not always be an applicable value for Category 3
Opened: A time stamp of when an incident is opened; cannot be changed
Opened by: The user who opens the incident
Impact of the incident is the measure of how **business critical** it is. Usually directly proportional to a number of users influenced by the incident.
Scale – Low (One person), Medium (Several people, a small department), High (Large department, segments of the University)
Examples:
Urgency is a necessary speed of resolving an incident.
Scale – Low (5 days), Medium (1 Day), High (2 Hours)
Examples
Priority: The value given to an Incident, Problem or Change to indicate its relative importance in order to ensure the appropriate allocation of resources and to determine the timeframe within which action is required.
An example of a P1 incident would be a major financial accounting application being down.

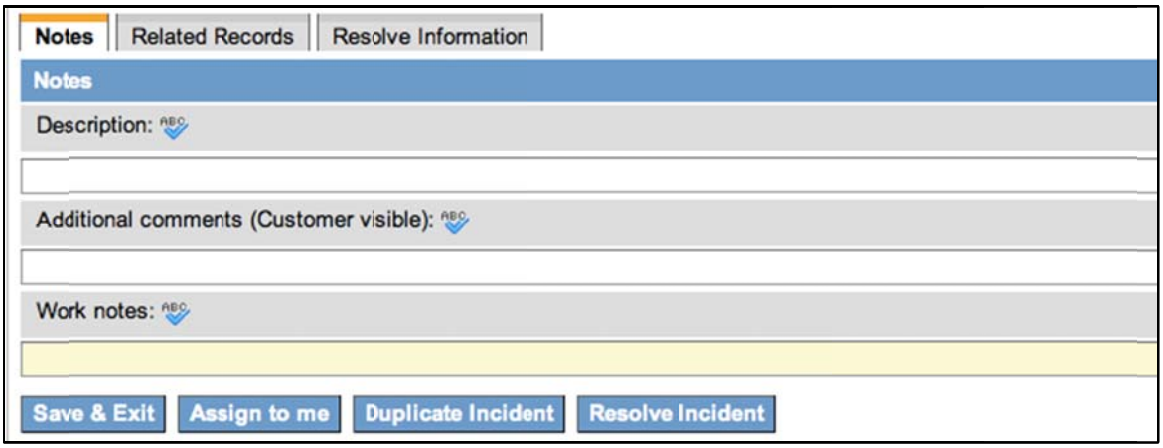
Impact				
	High	3	2	1
	Medium	4	3	2
	Low	5	4	3
		Low	Medium	High
		Urgency		

Assignment group: The group that owns the incident, and is responsible for the work
Assigned to: the individual person that owns the incident
Watch List: A list where users can add additional names and will receive all notifications the client would receive. Clicking the lock will open the field to allow Users to add additional people to the watch list. Clicking the lock again will close the field, locking into place what users are placed on the list. Users on this list will receive the same notifications as the Client. This can be used to give notifications to key

resources (e.g. Incident manager) and for ad hoc communication to Tier 2 resources to aid in incident resolution.
Knowledge: A checkbox that indicates that the incident should be reviewed to have a knowledge article created from it.
Time worked: A running clock of how much time the incident has been worked. Users have the ability to press the red "stop" button to stop the timer, or press the green "play" button to have it run again. When the time is stopped, users have the ability to manually enter in the amount of time that is in the boxes.
Short Description: A short text field to describe the incident. The lightbulb icon next to the short description will pop-up a window of common issues. Clicking the issue will fill the short description with that value. The book icon will search the knowledge base using the contents of the short description. Depending on how you create your templates (covered later) the short description field could be over-written, so fill it out last.

Tabs

Notes Tab



Description: A large text field for a long description of the incident
Additional Comments: Whenever the user enters text into this field and saves the ticket, the contents of the field will be EMAILED directly to the client. This email, and the reply if the client replies, will be entered directly into the activity log. This can be best used when additional information is needed from the user experiencing the issue. This can also be used, if the user cannot be called, to give them instructions on how to resolve their incident (ex: "Restart your router") or with workaround details.

Work Notes: Whenever the user enters text into this field and saves the ticket, the contents of this field will be entered into the activity log. This is NOT customer facing, internal only
Activity: This is a running activity log of all changes and updates made to a ticket

Related Records

Problem: The parent problem record the incident is associated to
Parent Incident: If the incident is associated to another incident as a child, that ticket number is entered here. Clicking the magnifying glass will pop up a window that has a list of all incidents. Here users will have the ability to run filters to locate the parent incident they are looking for. Any incident that is associate to another as a child will appear in the Parent incidents "Child incidents" tab.

Ex: A user creates INC0003. Using the magnifying glass, they find INC0001 and enter it into the parent incident field. When the user goes to view INC0001, INC0003 will appear in the "Child Incident" tab of INC001.
Change Request: If the incident requires a change to fix, enter the change number here
KB Article: If the incident is associated to a change article, enter the KB article number here.

When users open a KB article, they will see a "Attach to Incident" button in the upper right corner. This button will fill the KB article into the "KB Article" field under related records.

Also on the KB article, in the bottom right, users will be able to rate KB articles and flag them. If users check the "Flag Article" checkbox, another field will appear asking for feedback. Knowledge managers will then be able to review all flagged

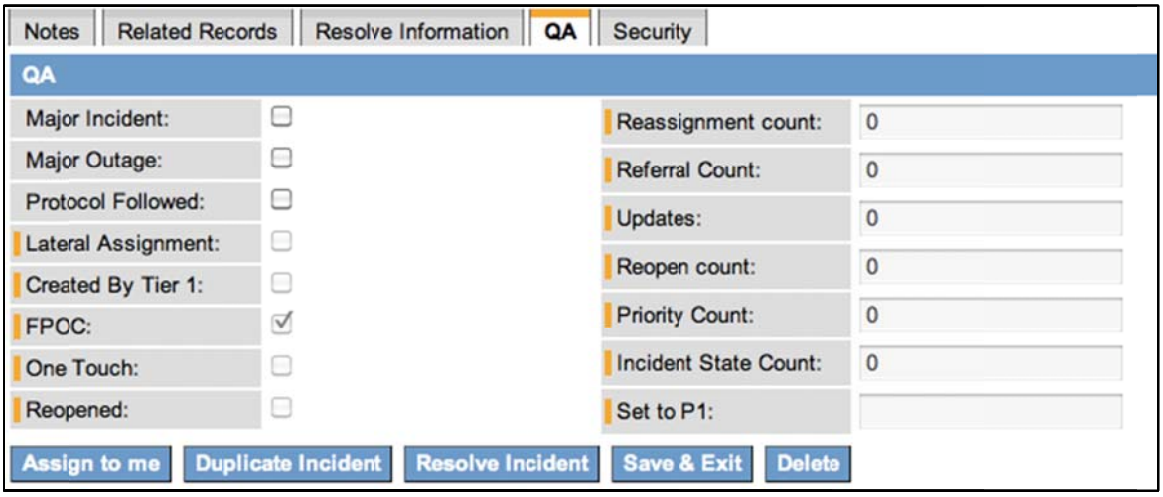
articles for content and evaluate based on the user's feedback.

Resolve Information

Note: Two additional fields, Resolve code and Resolve notes, only appear when the state is set to resolved. Whoever is working the ticket and believes they have resolved the issue should set it to the resolved state. However, whenever the incident is set to resolved, appropriate closure information should be entered and the incident will ALWAYS be reassigned to the Service Desk.

Resolved by: The user who resolves the incident
Resolved: The date the incident was resolved
Resolve time: The amount of time that passed until the incident was resolved
Resolve Code: The category of the incident's resolution
Resolve notes: A text field to describe how the incident was resolved

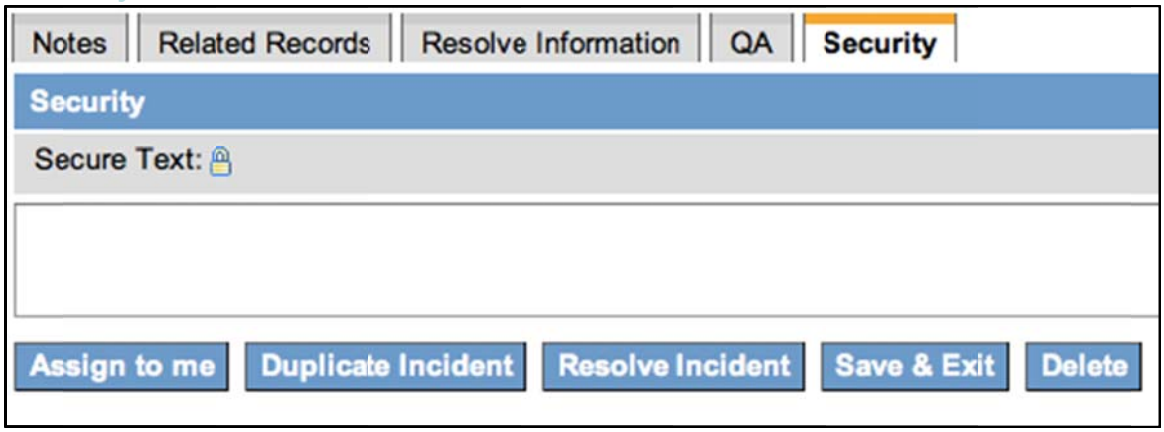
QA



Major Incident: Checkbox to indicate the incident is a major incident

Major Outage: Checkbox to indicate the incident is a major outage
Protocol Followed: A checkbox to indicate proper protocol was followed
Lateral Assignment: A checkbox that automatically checks when a ticket is reassigned laterally
Created by Tier 1: A checkbox that is automatically checked when Tier 1/Service desk creates the ticket
FPOC: A checkbox automatically checked to indicate First point of contact
One Touch: Automatic checkbox to indicate one touch was achieved. One Touch indicates the incident was logged and resolved by the same workgroup, without being reassigned
Reopened: An automatic checkbox that checks when a ticket is reopened from the resolved state
Reassignment count: The number of times a ticket has been reassigned
Referral count: The number of times the ticket has been referred
Updates: The number of times the ticket has been updated
Reopen count: The number of times a ticket has been reopened
Priority Count: The number of times the priority has changed
Incident State Count: The number of times the incident state has changed
Set to P1: The date the incident was set to P1

Security

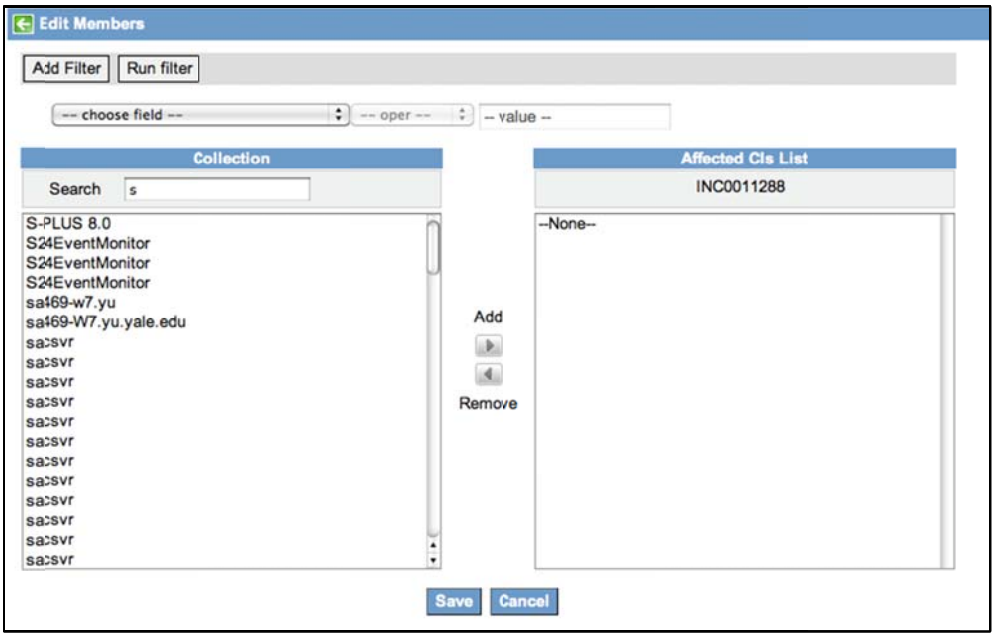


Secure Text: A large text field that will be encrypted

Affected CIs

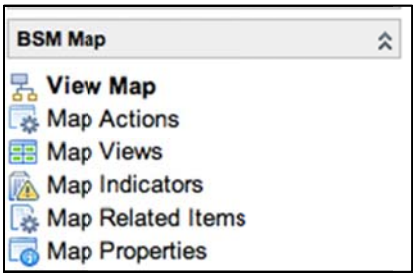
The affected CI's tab will allow users to associate additional Configuration Items to the incidents. These CI's should be CI's that are AFFECTED by the incident, but are not CAUSING it. To do this:

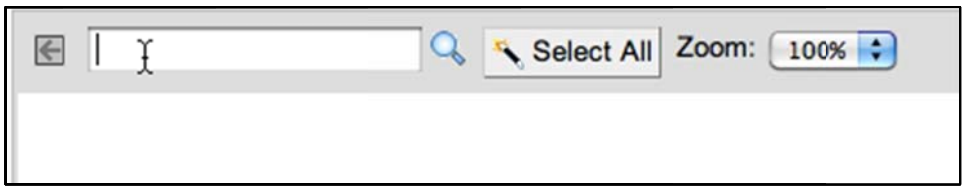
1. Click the Edit Button
2. User will be taken to the Edit members screen
3. Users can search all CI's, and add as many as needed by selecting them in the "Collection" column and hitting the "Add" button. The selected CI's should appear on the Affected CIs list on the Right
4. Click Save



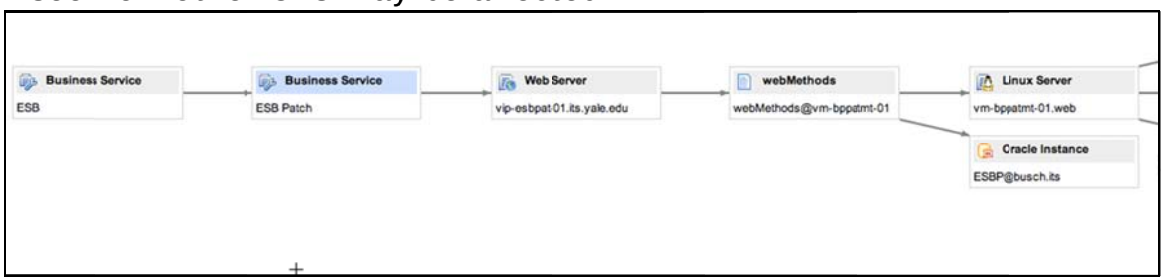
In addition, users can simply look at BSM maps. To do this:

1. Go to the sidebar and find the BSM map application
2. Select View map
3. This will take the user to the BSM map screen. At the top, they can enter the Configuration Item

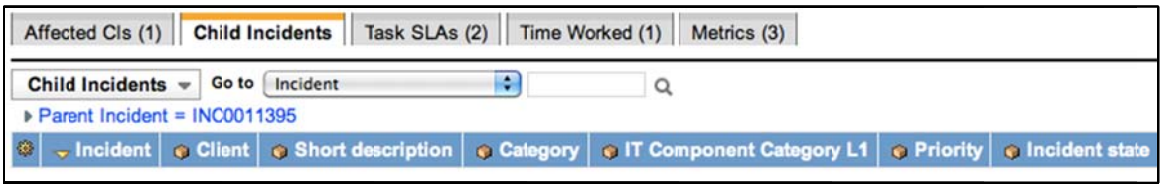




In the top bar, users enter in Configuration items. ServiceNow will then draw a map of other CI's that are connected, so Users can quickly see how other CI's may be affected.



Child Incidents

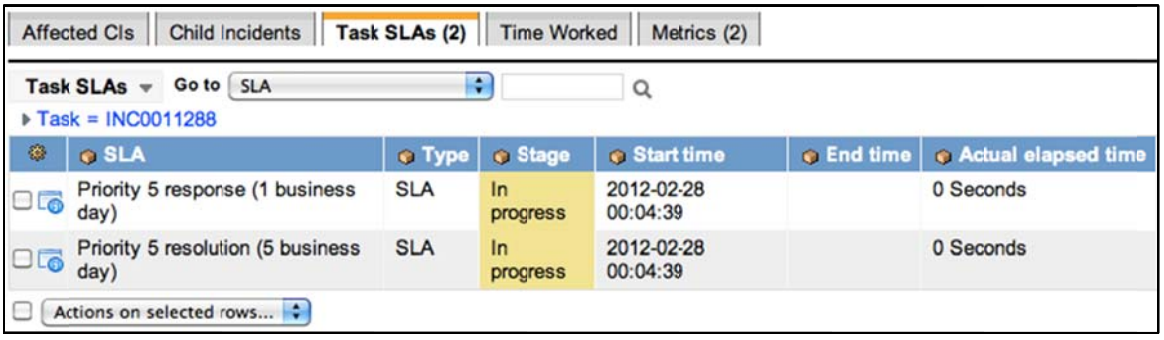


This tab will display all incidents that are associated to the incident as a child. Here we will see any incident that has the open incidents number filled into the “Parent incident” field under the related records tab.

Relating incidents is important, as it will allow incident/situation managers to better gauge the impacts to other services that are affected by the major incident

Task SLAs

The task SLA’s tab will show all SLA’s that are currently running against the incident. Users will be able to see The SLA, stage, start time, end time, actual time elapsed, and actual elapsed percentage.

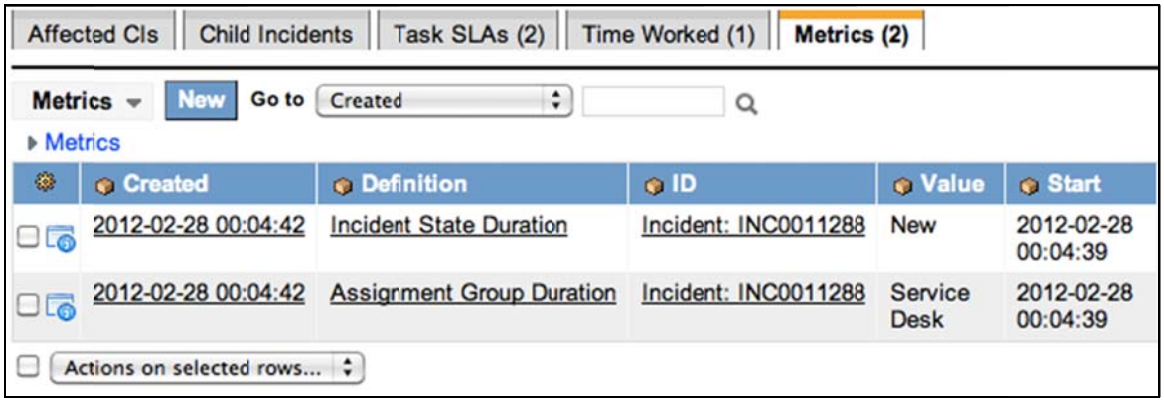


Time Worked

Every time a ticket is updated, an entry will be added to the Time Worked Tab. The time entered will be for the logged in user, and time

will be the time that is in the “Time Worked” timer that runs at the top of the page

Metrics



The metrics tab will show all metrics that are being calculated from the incident. A list of metrics:

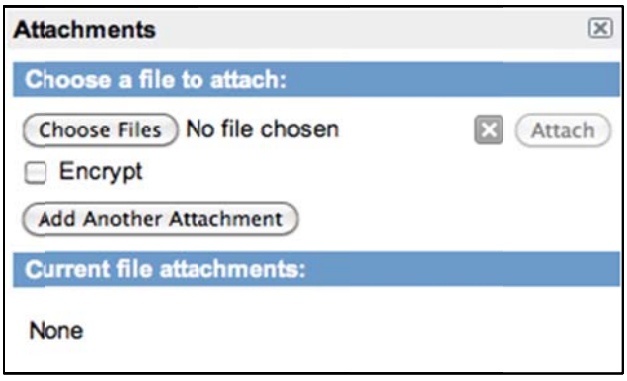
Incidents Resolved at FPOC	Incidents resolved at Help Desk
Incidents Resolved Via One-Touch	First incident resolution
Accuracy of Assignment	% Incidents assigned incorrectly
Accuracy of Escalation	% Incidents escalated
Average Time to Respond	Average time for second level support to respond
Cost per Incident	Cost per Incident
Incident Backlog	Ageing Incidents
Incidents By Contact Type (e.g. Channel)	Incidents by Source (e.g. Call, Email etc.)
Incidents Logged Bypassing Tier 1	Incidents that bypassed help desk support
Incidents Re-Opened	Incidents reopened

Incidents Resolved within priority-based SLO	Incidents resolved on time
Incidents Responded to from Customer Perspective, within priority-based SLO	Incidents responded on time (customer-perspective)
Incidents Responded to within priority-based SLO	Incidents responded on time
Re-Assignment Count	Reassignment Count
Volume by Priority/Severity	Incidents by Priority
Volume / % Incidents By Type	Derived

Attachments

Users have the ability to add attachments to Incidents. To do this:

1. Find the paperclip icon in the upper-right corner of the screen
2. This will pop-up the add-attachment screen:



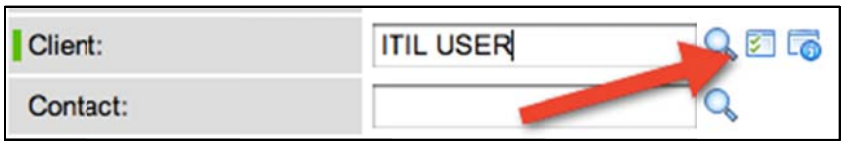
Users will be able to choose files local to their computer to add, and will have the ability to choose to encrypt it if they need to.

In addition, anytime a Client emails an incident within ServiceNow (either creating an incident via email or replying to an email from an incident) ANY attachments included on the email will be attached to the incident. Also, any embedded images in the email will be converted into attachments by ServiceNow and attached to the incident (this includes embedded images in signatures).

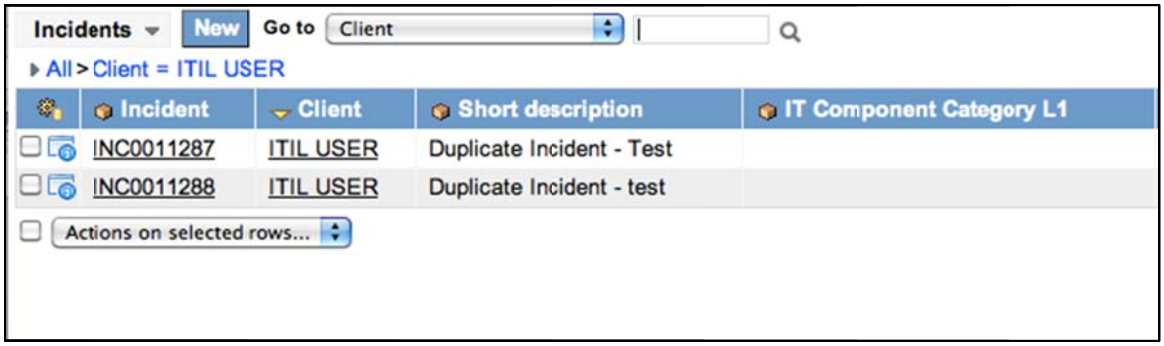
Viewing Client History

When a name has been filled into the Client field on the incident form, a new button appears. This button is the related incidents button. Users can click this button to see a list of incidents that user currently has open.

Clicking here….



Will take the user to a list of that user's open incidents…



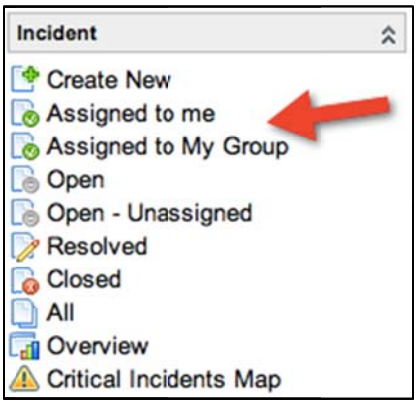
Saving Incidents

To save updates to a ticket, users simply need to either click the Save & Exit button at the top of the form or right-click the header and select

Save & Stay.

Assignment Group and Assigned To

The assignment group and assigned to fields are of particular note.



When an assignment group is filled into the assignment group field, all members of that group will see that incident in the "Assigned to My Group" list under the incident application.

Similarly, Any user whose name appears in the assigned to field will see that incident appear in

the Assigned to me list. List of Yale Assignment groups:

Academic Computing Resources
Academic Projects
Academic Research Services
AD
Alumni-Development Systems
AV Systems Integration & Learning Space Design
AYA Systems
Backup and Storage Administration
Billing Systems
Build Tools
Business Intelligence
Business Office
Change Advisory Board
Classroom Technology & Event Services
Client Accounts
CMDB_ADM
CMI2 Academic
Collaboration Services
Computer Science Support
Computer Support Center
Data Center Operations
Data Network Operations
Database Administration
Document Management
DSP Team 1
DSP Team 2
DSP Team 3
Effort Reporting
Exchange Infrastructure
Facilities Systems
Facilities Systems - FAMIS
Film Study Center
Finance Systems
Financial Planning and Systems
Fruition Partners
FSP-Astronomy Support
FSP-Faculty Support
FSP-MacMillan Support
FSP-Math Support
FSP-Music Support
FSP-Physics Support
Health & Life Science Systems
High Performance Computing Support
HR and Payroll Systems
HR-Training Management System
Identity Management
Information Security
Instructional Technology Group
Integration Systems
Medical Library Systems
Metrics_ADM

Mobile Telephone Support
OBGYN Support
OPAC Web Team
ORA Support
Organizational Change Management
Photo & Design
POAP and iExpense (ITS) Systems
Procurement and Integration Systems
Project Management Office
Public Safety
Quality Control
Relationship Management Team 1 (Paolillo)
Relationship Management Team 2 (Jibilian)
Relationship Management Team 3 (Lush)
Release Management
Research Administration Systems
Research.Yale.Edu Support
SDA_Confidential
Service Desk
Service Management
SERVICE_Desk_Analyst
SERVICE_Desk_Queue_MGR
SFAS
Software Configuration Management
Solution Architecture
Student Technology Collaborative
Support Technologies
SYSADM
Telecom
Telecom - TMO
Test
Unix Infrastructure & Virtualization Systems
Unix Support
Vendor Management
Web Application Development
Windows Systems
Yale Service Manager

Assign to me button

At the top of the form the user can see the Assign to me button. Clicking this button will change the assignment group to the logged-in user's assignment group and will place the logged in user's name into

the assigned to field.

Clone Incident Button

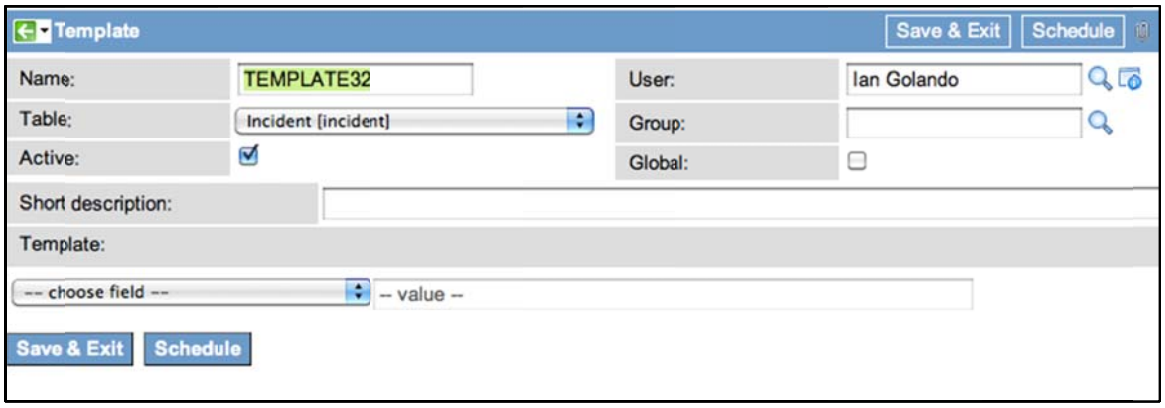
The clone incident button will do just that, clone the incident for the user, creating a copy of the ticket. (will update with picture when button is changed)

Creating Templates

Users have the ability to create "templates" – commonly created tickets. They can predefine what values they want various fields to have. To do this:

1. Right-click the top header
2. Select Templates
3. Select Edit Templates

This will take the user to the list of templates. To create a new one, click the "New" button. This will take the user to the new template screen:



Users Should give the template a name. Do not change the table, and do not uncheck active.
Under the "Template:" bar, the user will be able to select all fields available for the incident form, and what they would like the value to be.

Once they have added all fields and values they wish, they simply need to click "Save and Exit"

To apply a template:

1. Right Click the incident header
2. Select templates

3. Select Apply Template
4. Select the desired template

This will apply the templates settings to the incident ticket

Resolve Incident

Clicking the resolve incident button will automatically set the incident state to Resolved for the user.

Notifications

Users and clients will receive notifications at various stages of the incident process. Below is a table to describe when notifications will be created.

Trigger	Audience	Purpose
On create	Customer	Incident number and link/directions on how to provide additional information
On customer selecting link in initial email	Assignee or worklog if not accepted	Provide additional information and email assignee working on the incident (if assigned to an individual), otherwise just update work notes.
On hold	Customer	Email to customer indicating the incident is on hold including comments (from comments field) to identify missing information.
On P1 and P2 Assignment	Queue Manager	Advises the queue manager than a P1 incident has been assigned to their queue. Slightly different than other priority assignment.
On P1 or P2 Assignment to Tier 1 if Tier 1 initially logged	Service Desk Manager / Site Leads / Incident Manager	Notify the desk manager, site leads and incident manager of an inaccurate P1 or P2 assignment.

On Resolution	Customer	Advise customer of resolution, 15 day wait time and link/email to reopen incident is inaccurately resolved. Includes survey link.
On Reopen	Service Desk Manager / Site Leads	Advise the Service Desk Manager / Site Leads that an incident has been reopened and requires re-diagnosis.
On Reopen	Customer	Advise the customer that the incident has been reassigned for further investigation to resolve.
On Assignment – Queue Manager	Tier 2 Queue Manager(s)	Advise queue manager of an incident assigned to their group.
On Assignment – Assignee	Assignee	An assignee will be notified by email whenever an incident is assigned to them directly.
SLA Resolution Breech Notification	Queue Manager / Assignee / Incident Manager / Site Lead	Notification when SLA resolution target has been missed.
SLA Resolution Threshold Notification	Queue Manager / Assignee	Notification when SLA resolution target is past threshold criteria (defined by priority or by service).
SLA Response Breech Notification	Queue Manager / Assignee / Incident Manager / Site Lead	Notification when SLA customer response-time target has been missed.
SLA Response Threshold Notification	Queue Manager / Assignee	Notification when SLA customer response-time target is past threshold criteria (defined by priority or by service).
Non-Assignee Incident Update or update by resource that is not in assignment group	Assignee / Queue Manager *	Scenario 1: Incident is updated by someone other than the current assignee, and the assignee should be made aware of the update. Scenario 2: Incident is not yet assigned to an assignee but is assigned to a non-Tier 1 assignment group – the queue manager(s) of the assignment group should be made aware of the update

User emails

In addition, Clients have the ability to email ServiceNow specific emails for email-based support. Whenever a user sends an email to these addresses, a new incident will be created on their behalf. The description will be populated with the subject and body of the email,

and the Customer field will be populated based on a lookup based on email.

Whenever a Client replies to initial or resolution email, the work notes/activity feed will be updated and a notification, not including those on the Watch List. Remember, only emails to the client are sent out to Watch List users. will be sent to the incident assignee that the client has responded.

Service Desk Queue Management

Detailed below are the various lists and queues users can use to manage their incoming work.

Remember, work is assigned based on the groups entered into the "Assignment Group" field and the user placed into the "assigned to" field. It is up to the service desk to assign incidents.

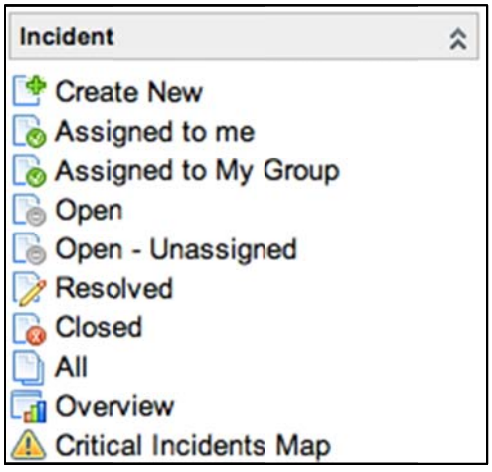
Homepage

Users can see incidents assigned to them on the ITIL homepage.
Incidents assigned to the logged in user's groups will be seen in the "My Groups Work" content block.
Incidents assigned to the logged in user will be seen in the "My Work" content block.

Incident Application

Under the incident application, users will see several lists where they can view their work and other incidents.

Assigned to me: A list of incidents assigned to the user
Assigned to My Group: A list of incidents assigned to the user's assignment groups
Open: A list of all open incidents
Open – Unassigned: A list of all open incidents that do not have a name in the Assigned To field
Resolved: A list of all incidents sitting in the resolved state
Closed: A list of all incidents in the closed



state
All: A list of all incidents, regardless of state
Overview: Takes the user to a homepage with various Incident-related content blocks

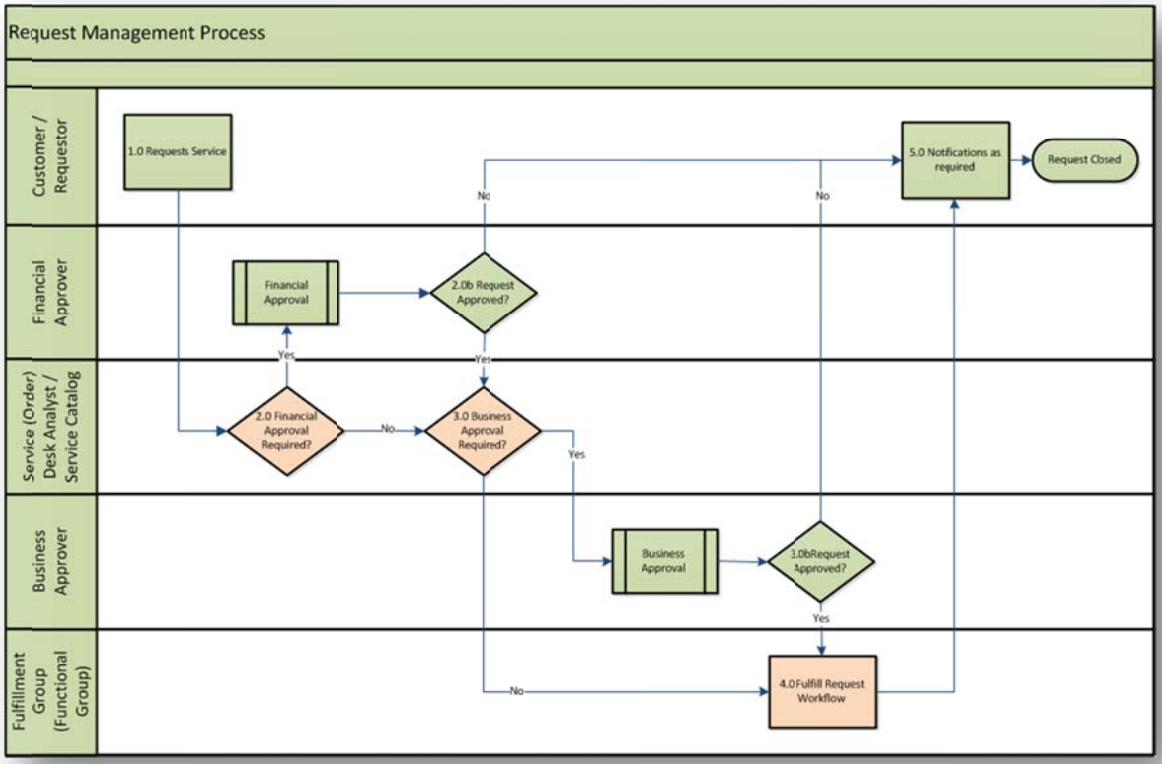
Incident Overview

The Overview link in the incident module will take the user to a homepage that has several different graphs and gauges all dedicated to incidents. This will provide users, at a quick glance, with the "status" of the incident process.

Requests

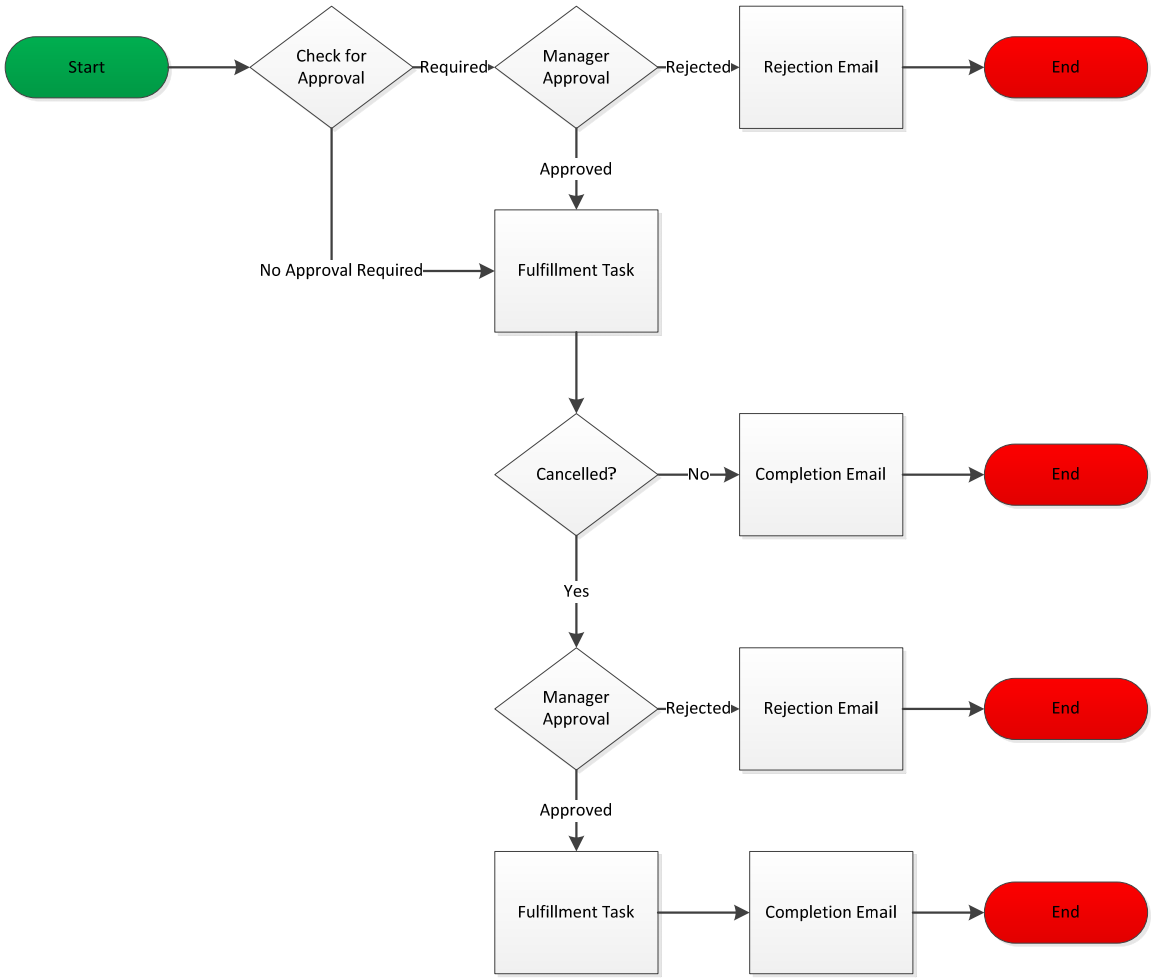
Below is the "swimlane" diagram for the overall request process. The different horizontal "lanes" represent a role within Yale (ex: fulfillment group, customer, financial approver, etc). Any process step that

appears in that role's lane indicates that role "owns" that step. (Ex: The Customer/requestor "owns" the "1.0 Request Service" process step)



The generic workflow for all requests is as follows:

1. Users begins the request by submitting it
2. ServiceNow will check to see if there are any Approvals needed. If so, the appropriate person must approve the request
    a. If approved, it moves on to the next process step
    b. If rejected, request ends and rejection email is sent
3. Once approved, fulfillment tasks are generated
    a. If the task is cancelled, the process ends and completion email is sent.
4. After task is fulfilled, another manager approval is necessary
    a. If approved, moves on to next process step
    b. If rejected, request ends and rejection email is sent.
5. Once approved, another fulfillment task is generated. Once this task is completed, the request is completed and a completion notification is sent.

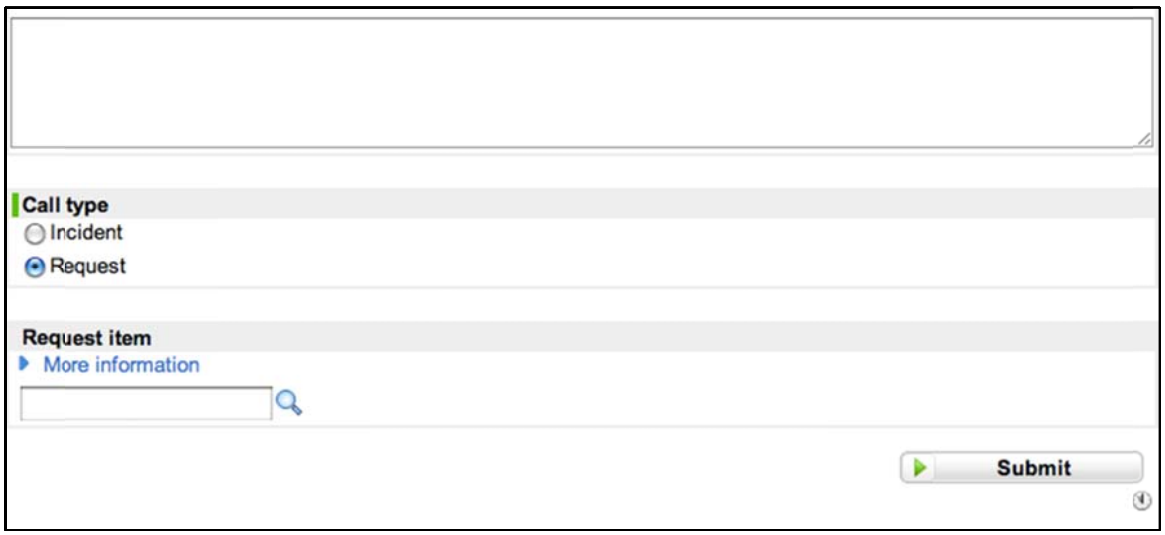


Creating New Requests

New Call Screen

Users can create new requests, just like incidents, from the new call screen. To do this:

1. Open a new call
2. Under Call type, Select “Request”
3. A new field will appear, “Request Item”. This is a reference field



The request is then handled by the first responder at the service desk. On submit, the user will be taken to that item in the catalog, ordering for the caller.

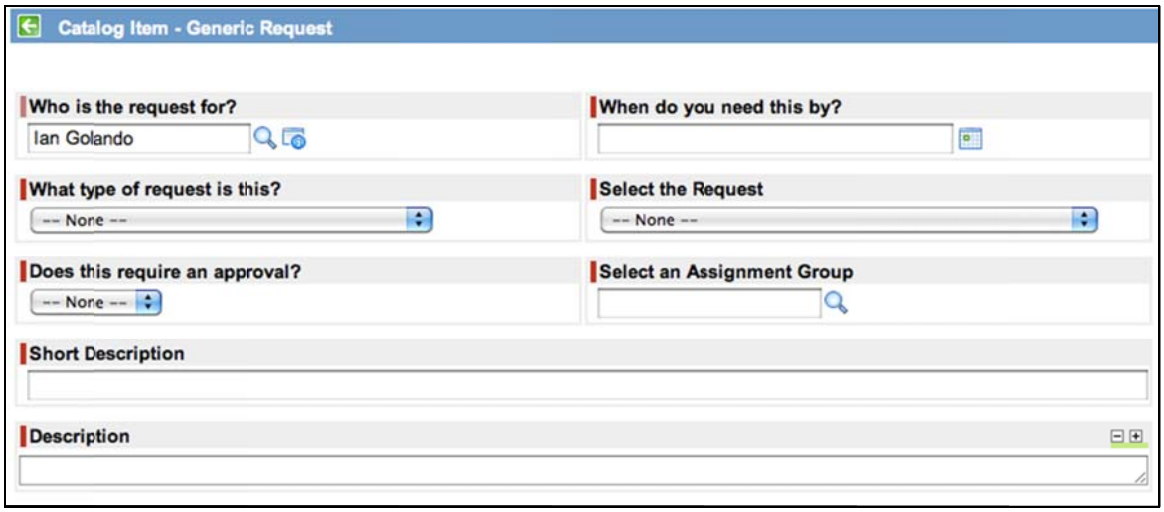
Service Catalog

Users will have access to the service catalog to create requests. They can find the service catalog both under the Self-Service application and the Service Catalog application.

On the catalog screen, the users simply need to click the type of request they need and then fill out the required fields.

Generic Request

Generic request form:

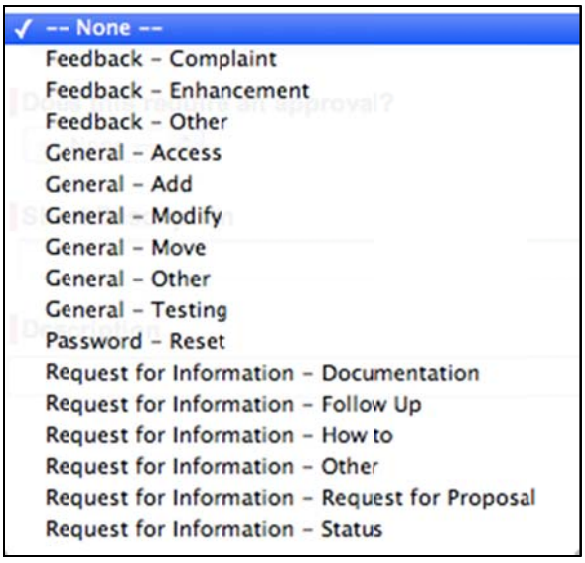


Fields:

Who is the request for?: User the request is for, a user lookup field that operates the same as “Client” on the incident form

What type of request is this?: A drop down with various options for the user to select.

Options:



Does this require an approval?: A yes/no drop down as to whether an approval is needed

When do you need this by?: A date/calendar field to give a timeframe by which the request needs to be fulfilled

Select the Request: A drop down with a large list of all the different options for the requests the user may have. There is an “Other” option if none of the options apply

Select an Assignment group: Place for the user to select the assignment group that will be responsible for fulfilling the request
Short description: A brief description of what the user is requesting
Description: A large text field to enter a detailed explanation of what the user is requesting, especially important if “other” is selected for request

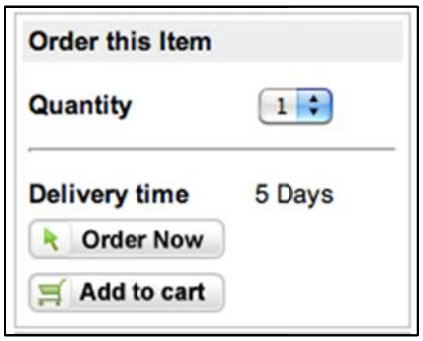
Request Basics

Colors

Much like incidents, all fields will adhere to the 3-color scheme: Red for required, yellow for auto-generated data, and green for recently changed fields

Order Now vs. Add to Cart

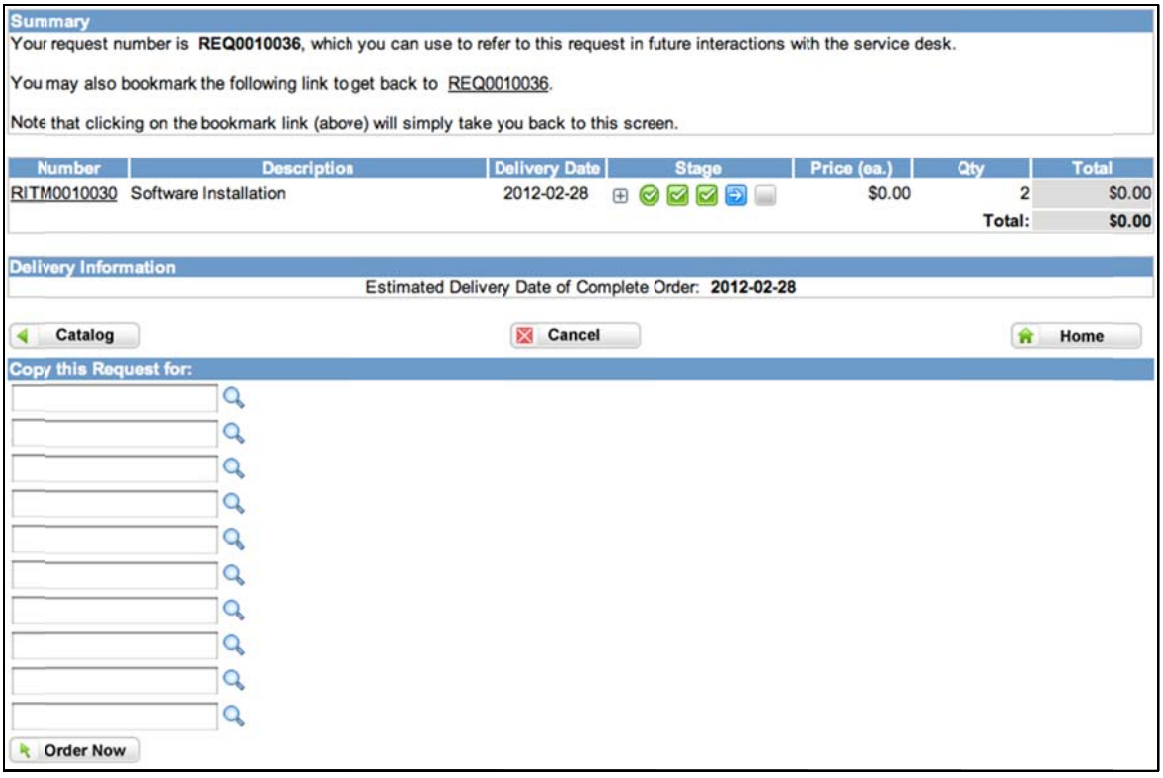
When requesting items, users will have two options upon request completion: order now or add to cart.



Clicking Order Now will request that item(s) and take the user directly to the order summary screen. Users can also change the quantity to order multiples of the exact same item.

Clicking Add to Cart will add the item to their shopping cart (Think Amazon.com). Users have the ability to add multiple items to their shopping cart. Once the user finally checks out their shopping cart, all those request items will be placed into a single request. If a user needs to order multiple items, this is the preferred route.

Order Summary Screen:

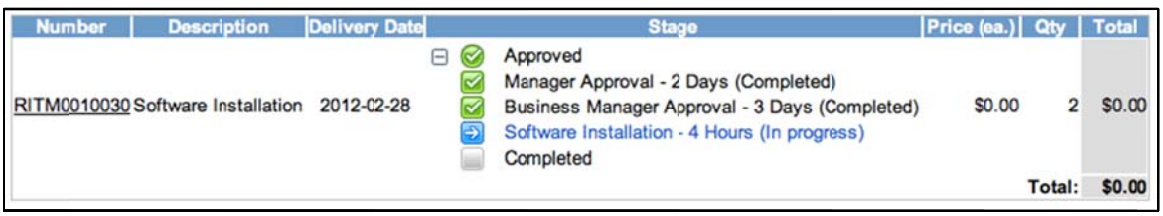


Checking Status

When a user submits a request, on the request summery screen they should bookmark their request link, either on their browser's bookmark or using the UI bookmarking on the left.

Once the user re-accesses their request summary, they will see the stage/summary of their request:

At a glance, the user can see that their request is in the 4th stage of 5. However, if the user clicks the [+] icon on the left of the stage field, they will be able to see exactly what stage their request is in:



Now, the user can see the request was approved and is in the Software installation phase, which should take approximately 4 hours.

The request states advance as each task associated to each stage is completed.

Working Requests

Finding Work

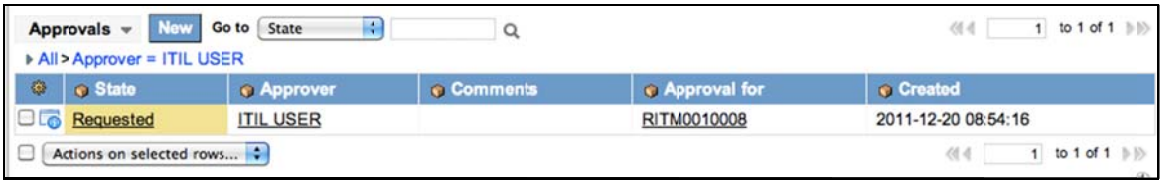
Users will find Requests, Request Items, and Tasks assigned to them and their assignment groups under the “My Groups Work/My Work” lists under the Service Desk application.

Service Requests are entirely driven by tasks. Requests cannot be closed until all associated tasks are closed. While a request item may not have required fields, catalog tasks do.

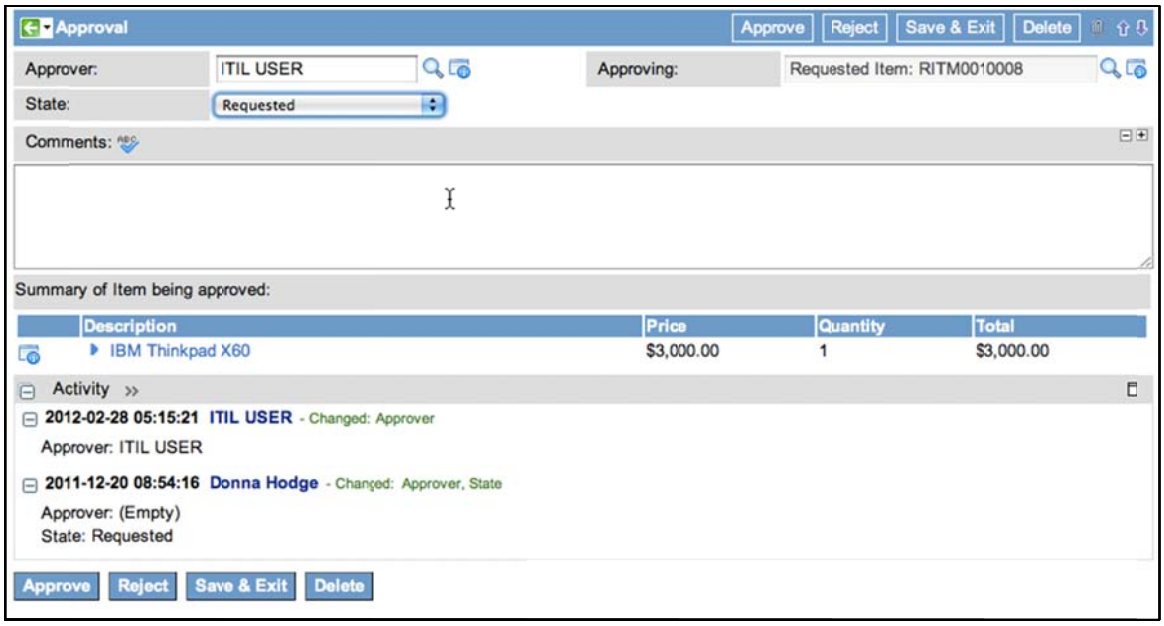
Approvals for Items

Users can approve requests two ways:

Email notification: Users will receive an email notification when they need to approve a request. They can click the link in the email and approve it directly from there.
My Approvals: Under the Service Desk application is the list My Approvals. This will show a list of all approvals pending the user’s input.



Users can enter the approval:

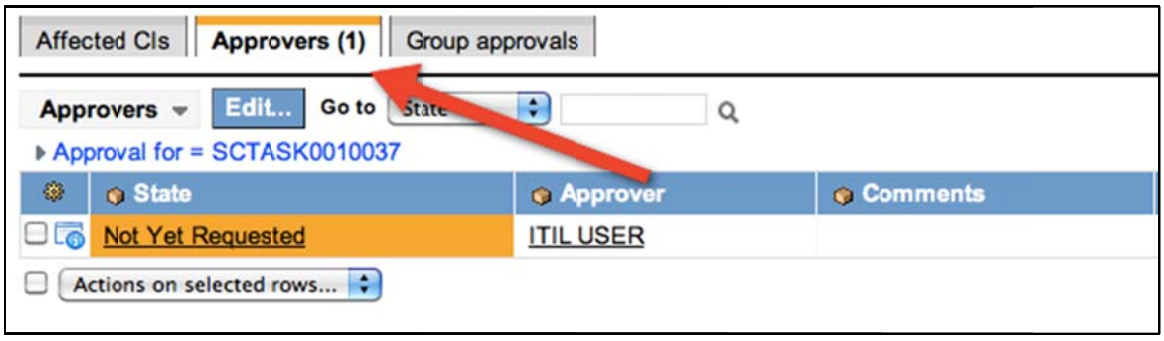


The user can either move the "State" field to any of the status, or click any of the Approve/Reject buttons, located at the top and bottom of the page.

Approvals on Tasks

Users have the ability to add approvals to tasks. To do this:

1. Navigate to the task needing approval.
2. Find the Approvers tab at the bottom and hit "Edit"
3. This takes the user to the Edit members screen, where they can add approvers
4. Hit Save
5. The user will now see the approver at the bottom in the approver tab

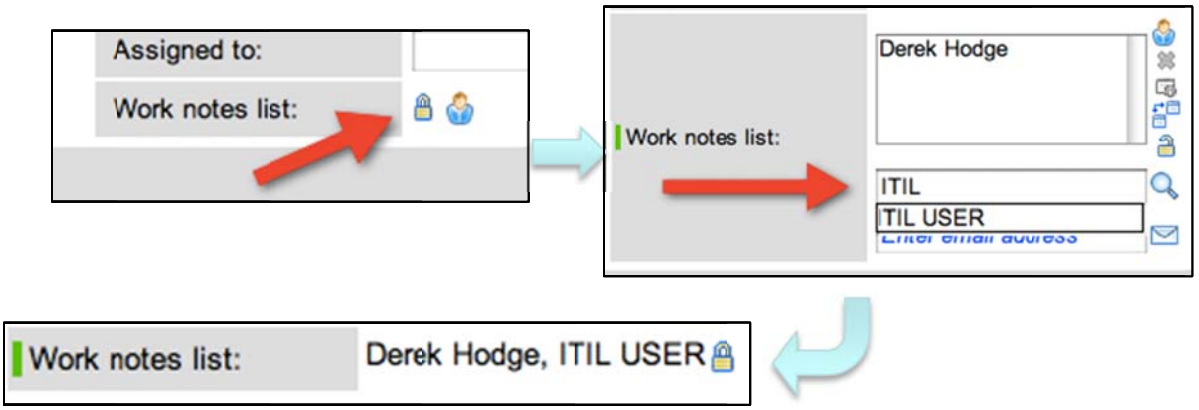


Updates

On tasks, users will see a "Work Notes List". Any users on this list will receive notification of any updates made to the work notes field.
To add members:

1. Click the lock

2. The field that appears is a user reference field. Add as many users as necessary to this list
3. Click the lock again

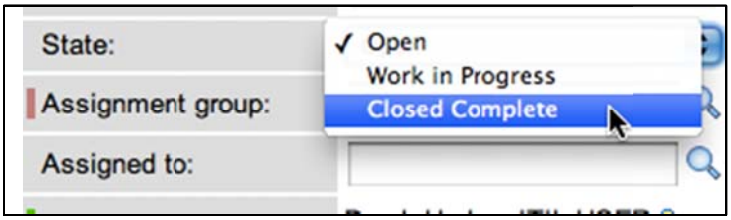


Tasks

Like stated earlier, tasks drive service catalog workflow. Workflow are designed by the owners of the request, and put into ServiceNow by system administrators. They can only be modified via change requests. Tasks are auto-generated based on the request.

Once a user has completed the work associated with a task, they must close it. To do this:

1. Navigate to the task
2. Move the state field from "open" or "work in progress" to "Closed Complete"
3. Save the task



Note: Request items and requests will automatically close once all tasks associated to them are closed.

Service Catalog Lists

The service catalog has a few lists users may find helpful:

Requests: A list of all open requests

Fields:

Number: The unique request number
Requested for: What caller the request is for
Opened by: Who opened the request within ServiceNow (may not be the same as requested for)
Request state: The current state the request is in
Due date: The date the request is to be fulfilled by

Items: A list of all open request items

Number: The unique request item number
Item: The actual item/service being requested
Stage: The stage of that item's fulfillment.

Note: Stages vary for different request items. Some items may only have 3 stages, some may have 6. Clicking the [+] button will provide additional details to the stage.

Request: The request the item is stemming from
Requested for: Who the item is requested for
Opened by: Who opened the request the request item stems from
Due date: The date the individual item must be fulfilled by
Quantity: The number of that particular item requested

Tasks: A list of all open catalog tasks

Tasks are generated by ServiceNow automatically, and are dependent on the request item. One request item may only have one task while another has 5. If you wish to change the tasks that are automatically generated, please contact the service owner and submit a change request.

Number: The unique task number

Priority: The “importance” of the task, the order in which tasks should be completed
State: The state of the task, options are “Open”, “In progress,” and “Closed Complete”. This is similar to the incident state field. These states will drive workflow.

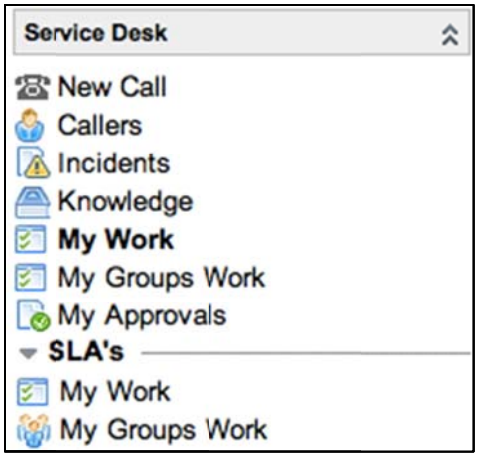
Example: There is a “procurement” stage for a REQUEST ITEM. A task generated for that item is the “procure laptop” task. Once that TASK is marked “Closed Complete” The “procurement” stage on the ITEM level will change to the green checkbox/complete.

Short Description: A brief explanation of what the task is
Assignment group: The work group that owns the task/is assigned to it
Assigned to: The individual person that owns the task/is assigned to i

Include typical scenarios for verification of student understanding for Incidents and requests.

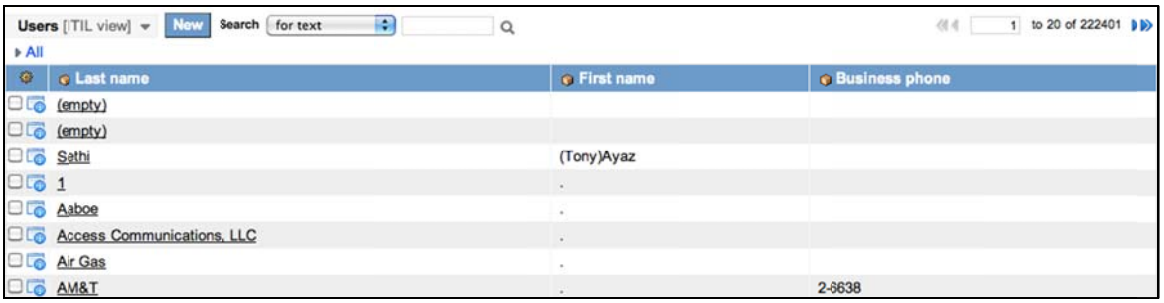
Service Desk

The Service Desk application is its own application but applies to all processes. Essentially, it provides quick access to many different items that will be very useful to the users.



New Call: Will take the user to the new call form, as described in the incident section

Callers

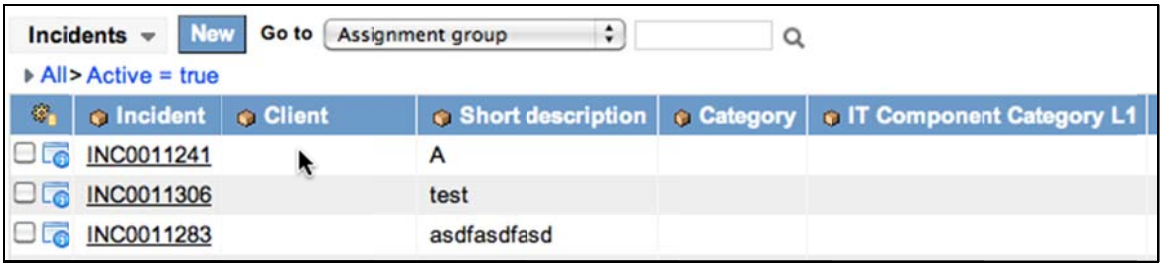


The callers link will take the user to a list that contains all users within ServiceNow. Like any other list, the users can run filters and personalize lists from here. Users will be able to click into user records.

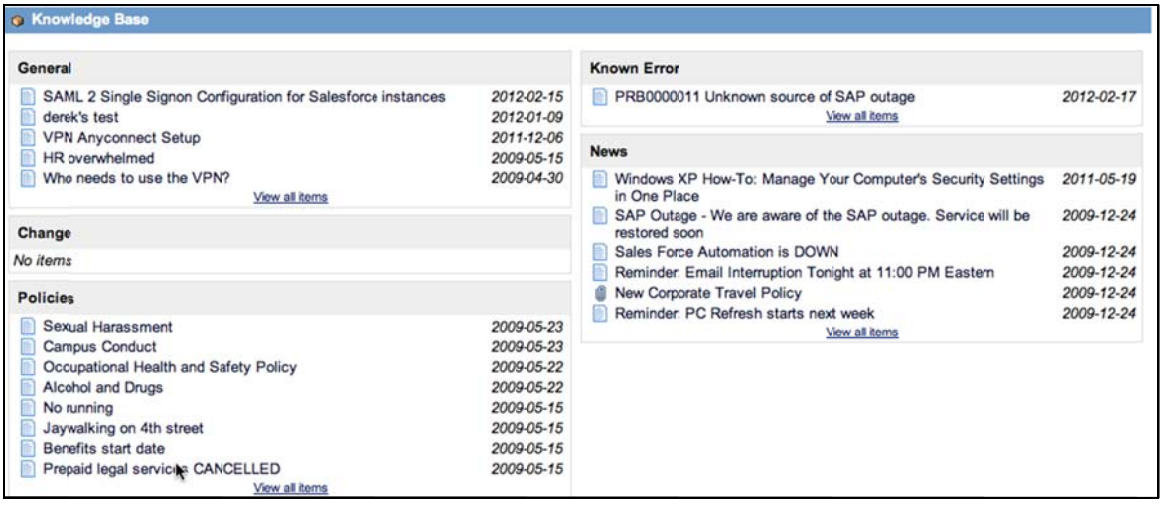
On the user records they will be able to see open incidents and configuration items associated to the user

Incidents

This will simply display a list of all active/open incidents.

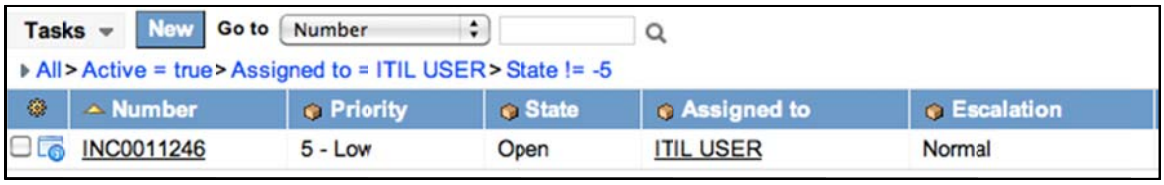


Knowledge



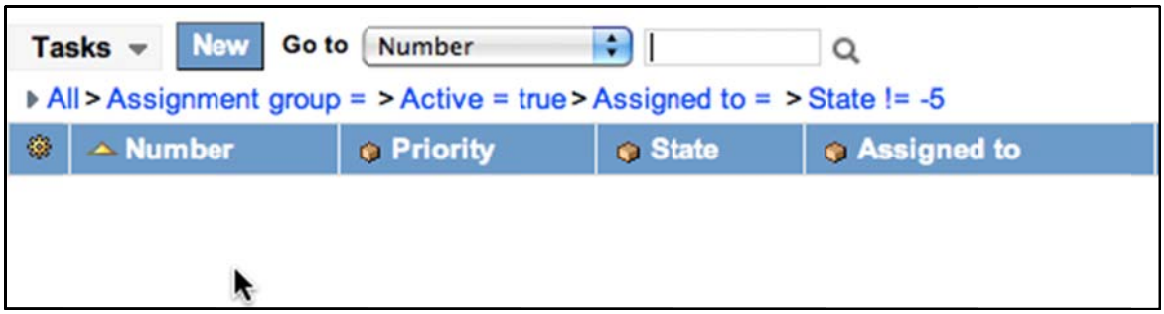
Knowledge will take the user to the Knowledge homepage, where they can view and search different knowledge items.

My Work



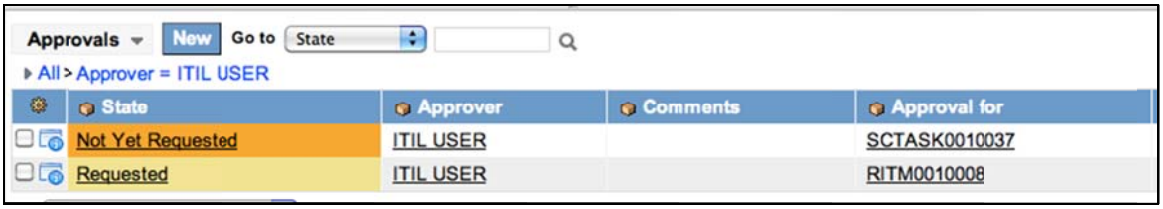
My work will take the user to a list of ALL items within ServiceNow that have the logged in user's name in the assigned to field. This can and will include incidents, request tasks, problems, etc.

My Groups Work



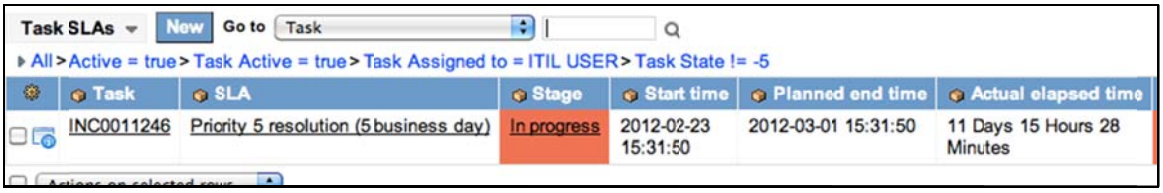
My groups work will take the user to a list of ALL items within ServiceNow that have the logged in user's assignment group in the assignment group field. This will be all items, including incidents, tasks, changes, etc.

My approvals



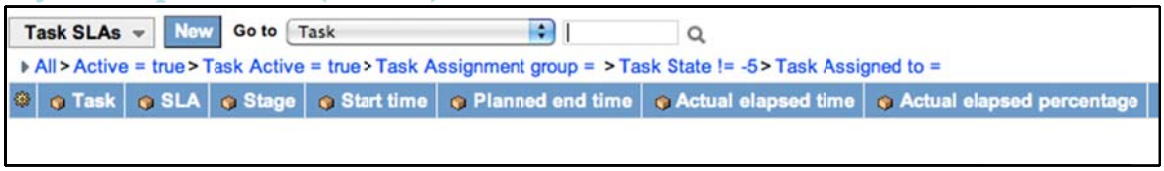
My approvals will take the user to a list of all approvals that need the user's input. Users can click the approvals on the list to go to the approval screen to approve, or they may simply double-click the "state" field and approve from there.

My Work (SLA's)



My work under the SLA's portion of service desk will show the user a list of all SLA's on work items that have been assigned to them. Users will be able to use this to see what work items are close to breaching SLA's and prioritizing accordingly.

My Groups Work (SLA's)



My groups work under the SLA portion of service desk will show the user a list of all SLA's on work items that have been assigned to their assignment groups. Users will be able to see the status of the SLA's and can prioritize their work accordingly.