ServiceNow Navigation,
Incident/Request Management

Phase I
April/May 2012
Introduction

ITIL and ServiceNow Concepts
ServiceNow Navigation
Working with Incidents
Break
Establishing Relationships
Working with Incidents
Modifying Lists
Service Requests
Meet your Instructor

Michael Okrent
Change Management Generalist
Employee for 4.5 years
Hobbies Electric Vehicles and Flying
Introductions

- Your Name
- Your Assignment Group(s)
- How long you have been at Yale
- Hobbies
After completing this course, you will be able to:

**Objectives**

- Understand the fundamentals of ServiceNow navigation and management
- Understand basic Incident Management and Request concepts
- Search and manage Incident Queues
- Create and resolve an Incident
- Create and resolve Requests
Introduction

**ITIL and ServiceNow Concepts**

ServiceNow Navigation

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Modifying Lists

Service Requests
Objectives

- ITIL Overview
- Review of Terminology
  - Incidents, Requests, Problems, and Changes
- Incident Lifecycle Overview
- Project Guiding Principles
• **What is ITIL?**
  ITIL® is the only consistent and comprehensive documentation on best practices for IT Service Management. Incident Management, Request Management, Problem Management
  Service Desk falls within Service Operations.

• **Why ITIL?**
  Describes best practices in IT Service Management
  Includes governance
  Focus on Continual Measurement and Improvement of the IT Service Delivered, from both a business and customer perspective
Review of Terminology

Incident - Something is broken

Problem - Something needs to be permanently eliminated from the environment

Change – I need to make a change to the environment

Service Request - I want something

Useful Definitions:
Service Catalog = Amazon
CMDB = Configuration Management Database
CI = Configuration Item
<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Incident Manager</strong></td>
<td>Oversee day to day process execution. Often the Service Desk Manager. Manages major incidents until the appropriate situation manager is identified.</td>
</tr>
<tr>
<td><strong>Situation Manager</strong></td>
<td>Manages and owns major incidents.</td>
</tr>
<tr>
<td><strong>Service Desk Manager</strong></td>
<td>Manages the service desk function, including staffing management activities. Provides guidance to Service Desk Analysts.</td>
</tr>
<tr>
<td><strong>Incident Process Owner</strong></td>
<td>Owns the process end-to-end, including the RACI, process &amp; procedural steps, role &amp; definitions. Accountable for maturing and evolving the process, based on monthly/quarterly/yearly review of process KPIs. Adjusts the process to address performance or changing business needs.</td>
</tr>
<tr>
<td><strong>Service Desk Site Lead</strong></td>
<td>Responsible for the operations of Service Desk Analysts that are geographically disperse, reporting to the Service Desk Manager.</td>
</tr>
<tr>
<td><strong>Service Desk Analyst</strong></td>
<td>Logs incidents. Provides initial diagnosis. Resolves incidents at first point of contact if possible. Escalates incidents. Owns non-major incidents.</td>
</tr>
<tr>
<td><strong>Caller / Customer</strong></td>
<td>The end user having or reporting the service interruption.</td>
</tr>
<tr>
<td><strong>Functional Group – Queue Manager</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Functional Group – Tier 2+ Analyst</strong></td>
<td>Group of technical support experts that will handle issues escalated by the Service Desk. For example, a Network Engineer. Receive process direction for a functional group queue manager, staff management from a reporting manager.</td>
</tr>
</tbody>
</table>
Course Agenda

Introduction
ITIL and ServiceNow Concepts
ServiceNow Navigation
Working with Incidents
Break
Establishing Relationships
Working with Incidents
Modifying Lists
Service Requests
After completing this module, you will be able to:

**Objectives**

- Navigate to and around the ServiceNow client
- View Incidents and Requests
- Manage the available views for each queue
- Modify Lists
- Modify Homepages
Accessing ServiceNow

ServiceNow can be accessed in any web browser. Enter the address: yaleproduction.service-now.com in the web browser of your choice.

The only documented issues with web browser compatibility are in IE6, a far outdated version of Internet Explorer.

Log into: yaletraining.service-now.com
What you will see when you login

Welcome to UI 2011

Inspired by customer feedback and modern social tools

Split the screen horizontally or vertically for a combined list and form view

System banner and navigation menu toggle

Create and manage bookmarks

A bookmark is a link to almost anything in the system (you’re viewing one now). Bookmarks are created by dragging a link to the left edge.

Bookmarkable links

- Modules from the navigator
- Breadcrumbs from lists
- Links from lists
- Reports

Keyboard shortcuts

- CTRL + CLICK: Open a bookmark as a flyout
- SHIFT + CLICK: Open a bookmark in a pane
- ALT + B: Toggle the top banner
- ALT + H: Toggle the horizontal split pane
- ALT + V: Toggle the vertical split pane
- ALT + N: Toggle the left navigator
- ALT + M: Maximize a specific pane

Priority 1 Incidents

View all active incidents

Quick Links

- Getting Help from ITS
- ITS Home Page
- ITS News
- ITS Policies
- ITS System Status Page
Main page is where lists, forms, and homepages will be displayed

Main page content changes, but sidebars stay the same
The global search can be used to search ALL data within ServiceNow, not just a specific module.

Ex: A user cannot remember a ticket number, but remembers the short description has “penguin” in it. They type penguin into the global search:

To return these results:
Global Search

The global search can be used to search ALL data within ServiceNow, not just a specific module.

Users can also type in an exact ticket number, to be taken directly to that ticket.
Ex: INC0011404
The Bookmark bar has 2 functions: It allows users to create quick links (bookmarks) to tickets and allows them to alter their mainpage view.

The top 2 buttons allow the user to collapse the left hand navigation toolbar (left button) and collapse the top header (right button).
The next two buttons allow the user to split their mainpage vertically (left) and horizontally (right). Lists will be displayed on the left/top and forms will be displayed on the right/bottom.

Horizontal split:
Users can add bookmarks to the bookmark bar, and the star button is used to manage them. To add bookmarks:

1. Find the incident you want to bookmark
Users can add bookmarks to the bookmark bar, and the star button is used to manage them. To add bookmarks:

2. Click and drag the number over to the bookmark bar
Users can add bookmarks to the bookmark bar, and the star button is used to manage them. To add bookmarks:

3. A new bookmark will appear on the bar. Hovering over the bookmark will tell the user what is linked, and allow them to edit.
The left hand navigation bar will display all modules and processes the user has access to. Key features:

- Clicking any application header will collapse/expand it
- Typing in filter text box will filter out all content that does not have the search terms
Left Hand Navigation Bar

Expanding:

- Self-Service
- Service Desk
- Incident
- Problem
- Change
- Configuration
- Service Catalog
- Knowledge Base
- Reports
- BSM Map

Click here to expand
Filtering:

Typing here...

Filters out the searchbar
ServiceNow Navigation (~ 5 Minutes)

- Go to the incident module, and click the “Open” link. Write down one of the incident numbers, and then enter it into the global search
- Create a bookmark for an incident from the “Open” incidents link
- Hide the left hand toolbar from view, and split the screen horizontally
- Expand/Collapse several applications
- Find the applications that have a “create new” option
Add My Work back if deleted from My ITIL Homepage
The incident application has various lists that will help the user view incidents.

**Assigned to me:** a list of all incidents assigned to the logged in user  
**Assigned to My Group:** A list of all incidents assigned to the logged in user’s assignment groups  
**Open:** A list of all open (non-resolved or closed) incidents  
**Open – Unassigned:** A list of all open (non-resolved or closed) incidents that are not assigned to a user  
**Resolved:** A list of all incidents sitting in the resolved state  
**Closed:** A list of all incidents that have been closed  
**All:** A list of all incidents, regardless of state
Example of a list of incidents: The Open list

<table>
<thead>
<tr>
<th>Incident</th>
<th>Client</th>
<th>Short Description</th>
<th>Category</th>
<th>IT Component Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>INC0011410</td>
<td></td>
<td>Planned Outage RFC: CHG0030418</td>
<td></td>
<td></td>
</tr>
<tr>
<td>INC0011409</td>
<td></td>
<td>Planned Outage RFC: CHG0030414</td>
<td></td>
<td></td>
</tr>
<tr>
<td>INC0011408</td>
<td></td>
<td>Planned Outage RFC: CHG0030387</td>
<td></td>
<td></td>
</tr>
<tr>
<td>INC0011407</td>
<td></td>
<td>Planned Outage RFC: CHG0030022</td>
<td></td>
<td></td>
</tr>
<tr>
<td>INC0011404</td>
<td></td>
<td>Test - Penguin</td>
<td></td>
<td></td>
</tr>
<tr>
<td>INC0011395</td>
<td></td>
<td>Issue with email</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Introduction
ITIL and ServiceNow Concepts
ServiceNow Navigation

Working with Incidents

Break
Establishing Relationships
Working with Incidents
Modifying Lists
Service Requests
Working With Incidents

After completing this module, you will be able to:

**Objectives**

- Create a new Incident
- Understand Categorization
- Understand what Impact and Urgency are, and how the Priority is calculated
- Understand the fields on an Incident ticket
- Resolve an Incident
There are two methods to create a new incident.

- Incident Module Create New Button
- Service Desk Module - New Call Button
Creating New Incidents
To create new incidents:
Navigate to the left hand toolbar and find the incident application
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.
Low Priority Case 1
- We are on the ITS Help Desk and John Smith calls reporting he is unable to log into his Windows PC. John is a staff member. Assignment Group is the CTS Service Desk and Phillip Barello asked you to complete the ticket for him.
- Fill in the description with: Upon further troubleshooting it is discovered their NetID was locked by Information Security because their credentials were compromised.
- The resolution was to unlock John Smith’s NetID and help them change their security questions and password after having them log into their PC.
Register a New Call Screen

Go to This Screen Now.
New Call Screen

Call Details:
- **Client Name**: John Smith
- **Contact Name**: 
- **Short description**: Unable to log into his Windows PC
- **Comments**: Received message that his password was locked
- **Call type**: Incident

Submit
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.
• **Impact**: Measure of the business criticality of the affected service
  - Scale – Low, Medium, High
  - Examples: Low = Single User, Medium = Single User performing patient care or <100, High >=100

<table>
<thead>
<tr>
<th>Low</th>
<th>Medium</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>= 1</td>
<td>&lt; 100</td>
<td>&gt;= 100</td>
</tr>
</tbody>
</table>

• **Urgency**: Measure of the business criticality of based on the impact and on the business needs of the customer
  - Scale – Low, Medium, High
  - Examples: Low > 24hrs, Medium <= 24hrs, High <= Less than 4hrs

<table>
<thead>
<tr>
<th>Low</th>
<th>Medium</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt; 24Hrs</td>
<td>&lt; 24Hrs</td>
<td>&lt;= 4hrs</td>
</tr>
</tbody>
</table>

• **Priority**: Sequence in which the incident needs to be resolved, auto-calculated based on impact and urgency. This is a read only field derived from Impact and Urgency.
  - See the Quick Guide
### Urgency/Impact Rules

**Incident Matrix**

<table>
<thead>
<tr>
<th></th>
<th>High</th>
<th>Medium</th>
<th>Low</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Urgency</strong></td>
<td><strong>Impact</strong></td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>High</td>
<td>Incidents that require resolution before 4 hours.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medium</td>
<td>Escalated service request or incident that requires resolution within 24 hours.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Low</td>
<td>Standard service request or incident that does not require resolution within 24 hours.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Low</td>
<td>Medium</td>
<td>High</td>
</tr>
</tbody>
</table>

#### Incident Prioritization Values

<table>
<thead>
<tr>
<th>Value</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Major Incident</td>
<td>Affecting a major service. Urgent, immediate and sustained action required. Major Incidents are reported up to the VP of Administration so this category should only be used for Incidents of large magnitude where immediate action is required to resolve.</td>
</tr>
<tr>
<td>2</td>
<td>Critical</td>
<td>Issue is affecting patient care or that requires continuous effort, even after normal business hours.</td>
</tr>
<tr>
<td>3</td>
<td>High</td>
<td>Client is unable to work or their work is severely impaired or an issue that requires continuous effort during normal business hours.</td>
</tr>
<tr>
<td>4</td>
<td>Average</td>
<td>Client is able to continue work though slightly impaired. An issue worked according to client ranking after all critical and high priorities have been addressed appropriately. Escalated Service Request</td>
</tr>
<tr>
<td>5</td>
<td>Low</td>
<td>Client is able to continue work though slightly impaired. Standard Service Request</td>
</tr>
</tbody>
</table>
Upon further troubleshooting discovered that NetID JS27 was locked by Information Security because their credentials were compromised.

Additional Comments (Customer visible):

Work Notes:

- 2012-04-03 13:03:58 Your Incident INC0011557 has been resolved. - Email sent
  - Sent: chloe.turnbull@yale.edu, nick.smith@yale.edu, michael.okrent@yale.edu, kevin.brigham@yale.edu

- 2012-04-03 13:03:37 Erika Reilly - Changed: Assigned To, Incident State
  - Assigned To: Erika Reilly
  - Incident State: Resolved was: Assigned

- 2012-04-03 12:17:28 Incident INC0011557 has been created - Email sent
  - Sent: nick.smith@yale.edu

- 2012-04-03 12:17:02 Erika Reilly - Changed: Impact, Incident State, Opened by, Priority, Work Notes
  - Impact: 3 - Low
  - Incident State: Assigned
  - Opened by: Erika Reilly
  - Priority: 5 - Low
  - Tired several times and couldn't remember my password
Michael Okrent calls in with a complaint that his MFD printer is not printing all his jobs. Use the Incident Module to record his incident.

- Click Incident in left Navigation Panel, then Click Open
- Click Create New
- Complete the incident ticket fields as appropriate
  - Client
  - Contact
  - IT Business Service
  - Incident Type
  - IT Provider Service
  - Component Categories
  - Short Description
  - Impact
  - Urgency
  - Priority
  - Assignment
  - Notes (Description, Add’l Comments, Work Notes)
- Resolve the Incident
Practice - Create New Incident

1. Create New Incident
2. Select Client
3. Enter Client Information
4. Select Contact Type

Yale IT Service Management Suite

Welcome: Kevin Bingham

Update Set: Default1

Switch to the old UI

Switch to the new UI
Practice
Complete Required Fields – IT Business Service
Practice
Complete Required Fields - IT Provider Service
Practice - Complete Fields as appropriate – IT Component Category L1 – Ln

1. IT Component Category L1: [Select appropriate category]

2. Short Description: [Select 'Hardware']
Practice - Complete Fields as appropriate
Practice - Complete required field as below

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incident State:</td>
<td>New</td>
</tr>
<tr>
<td>Incident:</td>
<td>INC00000010</td>
</tr>
<tr>
<td>Client:</td>
<td>Michael Okrent</td>
</tr>
<tr>
<td>Contact:</td>
<td>Michael Okrent</td>
</tr>
<tr>
<td>Notify:</td>
<td>Email</td>
</tr>
<tr>
<td>Contact Type:</td>
<td>Phone</td>
</tr>
<tr>
<td>Location:</td>
<td>25 SP 447B</td>
</tr>
<tr>
<td>IT Business Service:</td>
<td>Personal Productivity</td>
</tr>
<tr>
<td>Incident Type:</td>
<td>Service Interruption</td>
</tr>
<tr>
<td>IT Provider Service:</td>
<td>Personal Computing</td>
</tr>
<tr>
<td>IT Component Category L1:</td>
<td>Hardware</td>
</tr>
<tr>
<td>IT Component Category L2:</td>
<td>Network Printer (MFD)</td>
</tr>
<tr>
<td>IT Component Category L3:</td>
<td>-- None --</td>
</tr>
<tr>
<td>Asset/Device:</td>
<td></td>
</tr>
<tr>
<td>Short Description:</td>
<td></td>
</tr>
</tbody>
</table>

Assign Group Hierarchy:
- CTS Service Desk
- CTS Shared Computing Collaborative
- ITP Beinecke Library
- ITP Bio Technology Services
- ITP Campus Police
- ITP Center for Language Study
- ITP Central Library
- ITP Comparative Medicine
- ITP Dermatology
- ITP Diagnostic Radiology
- ITP Immunobiology
- ITP Investments
- ITP Neurology
- ITP OB/GYN Support
**Practice - Complete Fields as appropriate—Short Description, Description, Add’l Comments, Work Notes**

<table>
<thead>
<tr>
<th>Incident State:</th>
<th>New</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incident:</td>
<td>INC0000008</td>
</tr>
<tr>
<td>Client:</td>
<td>Michael Okrent</td>
</tr>
<tr>
<td>Notify:</td>
<td>Email</td>
</tr>
<tr>
<td>Contact Type:</td>
<td>Phone</td>
</tr>
<tr>
<td>Location:</td>
<td>25 SP 447B</td>
</tr>
<tr>
<td>IT Business Service:</td>
<td>Personal Productivity</td>
</tr>
<tr>
<td>Incident Type:</td>
<td>Service Interruption</td>
</tr>
<tr>
<td>IT Provider Service:</td>
<td>Personal Computing</td>
</tr>
<tr>
<td>IT Component Category L1:</td>
<td>Hardware</td>
</tr>
<tr>
<td>IT Component Category L2:</td>
<td>Network Printer (MFD)</td>
</tr>
<tr>
<td>IT Component Category L3:</td>
<td>-- None --</td>
</tr>
<tr>
<td>Assigned Field:</td>
<td></td>
</tr>
<tr>
<td>Short Description:</td>
<td>1 Printer Intermittent</td>
</tr>
<tr>
<td>Notes:</td>
<td></td>
</tr>
<tr>
<td>Description:</td>
<td>2 Printer 431b is printing intermittently</td>
</tr>
<tr>
<td>Additional Comments (Customer visible):</td>
<td>3</td>
</tr>
<tr>
<td>Workaround:</td>
<td>4 Was able to print 2 out of 5 documents sent to printer, was able to duplicate issue</td>
</tr>
<tr>
<td>Work Notes:</td>
<td></td>
</tr>
</tbody>
</table>

5 - Right-Click on the blue bar, and click “Save & Stay”
Practice - NOTE –
Add’l Comments and Work Notes moved to Activity area
### Practice Resolve Incident

<table>
<thead>
<tr>
<th>Incident State</th>
<th>In Progress</th>
<th>New</th>
<th>Assigned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incident</td>
<td></td>
<td>New</td>
<td>Assigned</td>
</tr>
<tr>
<td>Client</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Notify</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact Type</td>
<td>Phone</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>25 SP 447B</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IT Business Service</td>
<td>Personal Productivity</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Incident Type</td>
<td>Service Interruption</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IT Provider Service</td>
<td>Personal Computing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IT Component Category L1</td>
<td>Hardware</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IT Component Category L2</td>
<td>Network Printer (MFD)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IT Component Category L3</td>
<td>None</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asset/Device</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Short Description</td>
<td>Printer Intermittent</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Notes

**Description:**

Printer 431b is printing intermittently.

**Additional Comments (Customer visible):**

**Work Notes:**

**Activity**

2012-04-14 09:04:29 Kevin Brigham - Changed: Assigned To, Additional Comments, Impact, Incident State, Opened by, Priority, Work
Practice – Resolve Incident – Resolve Information Tab

<table>
<thead>
<tr>
<th>Incident</th>
<th>Required field</th>
<th>Assign to me</th>
<th>Mark as Duplicate</th>
<th>Save &amp; Exit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>IT Provider Service:</td>
<td>Personal Computing</td>
<td>Time Worked:</td>
<td>00:47:36 / 00:08:46</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IT Component Category L1:</td>
<td>Hardware</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IT Component Category L2:</td>
<td>Network Printer (MFD)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IT Component Category L3:</td>
<td>None</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asset/Device:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Short Description:</td>
<td>Printer Intermittent</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Resolve Information Tab**

1. Resolve Information

   - Resolved by: [ ]
   - Resolved: [ ]
   - Resolve Time: [ ]
   - Resolve Notes: [ ]

2. Resolve code:
   - Workaround Provided – Unconfirmed
   - Workaround Provided – Confirmed
   - Service Restored – Confirmed
   - Service Restored – Unconfirmed
   - No Fault Found
   - Customer Resolved
   - Duplicate Incident
   - Invalid Incident

3. Provided workaround to Mike. Confirmed he was able to print all documents successfully on printer 43.

Options:
- Assign to me
- Mark as Duplicate
- Save & Exit
- Delete

**Affected CIs**

<table>
<thead>
<tr>
<th>Affected CIs</th>
<th>Child Incidents</th>
<th>Task SLAs (2)</th>
<th>Time Worked (1)</th>
<th>Metrics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affected CIs</td>
<td>Edit...</td>
<td>Go to Configuration</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task = INC0000008</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Configuration Item**
### Practice - Incident in Resolved List

#### Table: Power BI for Incident Examples

<table>
<thead>
<tr>
<th>Incident ID</th>
<th>Net ID</th>
<th>Short Description</th>
<th>Category</th>
<th>IT Component Category L1</th>
<th>Priority</th>
<th>Incident State</th>
<th>Assignment Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>INC0000003</td>
<td>tpl2</td>
<td>Broken Jack</td>
<td>Network</td>
<td></td>
<td></td>
<td>Resolved</td>
<td>IF Network Engineering</td>
</tr>
<tr>
<td>INC0000006</td>
<td>skE96</td>
<td>&quot;no data&quot; in the Software Library</td>
<td>Application Software</td>
<td></td>
<td></td>
<td>Resolved</td>
<td>CTS Service Desk</td>
</tr>
<tr>
<td>INC0000008</td>
<td>mo4</td>
<td>Printer Intermittent</td>
<td>Hardware</td>
<td></td>
<td></td>
<td>Resolved</td>
<td>CTS Service Desk</td>
</tr>
</tbody>
</table>

### Notes

1. Create New
2. Assigned to me
3. Assigned to My Group
4. Open
5. Open - Unassigned
6. Resolved
7. Closed
8. All
9. Overview
10. Critical Incidents Map

---

**ITS INFORMATION TECHNOLOGY SERVICES**
Practice - Back in Ticket
Recap of what you have learned

• ITIL overview
• Guiding Principles behind the project
• Definition and examples of Incident, Request, and Problem
• Incident Management lifecycle overview
• Navigating ServiceNow
• Working with Incidents
Yale ITS sent a message to the university about a serious vulnerability requiring immediate update of Symantec Anti-virus. When the message was sent – many people attempted to connect to our Software Library and download the new software. As a result, the software library was unable to handle the load and became unavailable – affecting more than 100 people who are now vulnerable to a virus.

Impact (Low, Medium, High)
Urgency=(Low, Medium, High)
Academic Computing Resources (ACR), has identified (incidents) of a video card problem in the same computer model. Problem manifests itself by displaying only in black and white. We determined there are 105 computers with this video card – but only 52 incidents have been reported.

Impact= Urgency=

Yale Connect is reportedly unavailable based on numerous calls coming into the helpdesk. Impacting thousands.

Impact= Urgency=

Academic Computing Resources (ACR) receives an email from a VIP professor requesting ACR install additional software “X” for his lecture class tomorrow. Call logged at 8am. Class starts at 4pm.

Impact = Urgency=

A client calls the helpdesk having just responded to a phishing message – realizing their error, the client request a pin to change password.

Impact= Urgency=
Incident/Urgency Alignment Exercise 3

- Client accidentally deletes all the email in their Pantheon Inbox just now & requests the email team a restore it from a backup.
  - Impact= Urgency=

- Clients report inability to send email to yahoo.com It turns out Yahoo is blocking all mail from Yale addresses.
  - Impact= Urgency=

- MyTime is has gone down and an automated email was already queued & subsequently sent to thousands of staff asking them to approve their time today.
  - Impact= Urgency=

- President Levin has a virus on his mac air & is forced to use his iPad instead.
  - Impact= Urgency=
Course Agenda

Introduction
ITIL and HP Service Manager Concepts
ServiceNow Navigation
Working with Incidents

Break

Establishing Relationships
Working with Incidents
Modifying Lists
Service Requests
Course Agenda

Introduction
ITIL and HP Service Manager Concepts
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Working with Incidents
Break

Establishing Relationships
Working with Incidents
Modifying Lists
Service Requests
Establishing Relationships

Scroll down on incident record to the Related Records Tab

**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 INC0001.

**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
Working with Incidents

After completing this module, you will be able to:

**Objectives**

- Access the Incident queue
- Assign/Escalate an Incident to another unit
- Update an Incident
- View related records
The incident module has many different queues within ServiceNow, all of which can be found under the incident application.

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
Assignment Groups

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.

To reassign a ticket, simply change the names in either the Assignment group or assigned to fields.
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.
When a user has filled in the Caller field, they will be able to view all of that caller’s related incidents. To do this:
1. Fill out the caller field
2. Select the middle “related incidents” button
3. The user will be taken to a list of open incidents from the user.
When resolving incidents, users will have to input additional information under the Resolve Information Tab.
- Locate open Incident related to slow connectivity
- In progress with low priority
- Update description to show that there is now no connectivity and change the urgency to high.
- Change the assignment group to DSP Team 1
- Save and exit
- Instructor will become Mike DiMaggio and assign Tom Nelson
Course Agenda

Introduction
ITIL and ServiceNow Concepts
ServiceNow Navigation
Working with Incidents
Break
Establishing Relationships
Working with Incidents
Modifying Lists
Service Requests
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.
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.
General Steps to add a column to a list

1. Click on gear icon, upper left on blue row
2. Double click on desired new column
3. Press the up or down arrows to position the column
4. Click on OK
How to Filter lists

• Show me the tickets with 'YaleConnect' as the business service.
  – In the Left Navigation page expand Incident header and choose ALL
  – Click on gear at top left of blue bar, Personalize List Columns appears
  – Scroll down list to IT Business Service, double click to add it to the display list
  – Place the column where you want it using the up down buttons, press OK
  – At top of Incidents in Go to window find IT Business Service type in Yale Connect and click the search icon (magnifying glass)
  – Or click on IT Business Service and Group to see counts for all
Users can run filters on ANY list. 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)
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
1. Choose the field you want filter (this can be any field- choose other fields via the drop down menu)
2. Choose an operator
3. Choose a value in the drop down
4. Add more logical conditions via the and/or buttons
5. Click the Run button when finished adding parameters
Practice - create ad hoc queries

- How many Incident tickets have YOU opened today?
  - In the Left Navigation page expand Incident header and choose ALL
  - Click on gear at top left of blue bar, Personalize List Columns appears
  - Add Opened by, double click to add to the display list
  - Add Opened, double click to add it to the display list
  - Place the columns where you want them using the up down buttons, press OK
  - Click on the down arrow next to ALL above the blue bar
  - Choose “opened by” in the Choose field drop down
  - Choose “is” in the operator drop down
  - Type Your Name
  - Click the “+” button (opens another row)
  - Choose “Opened” then “on” in operator drop down, then “today”, Click run
  - Right Click on Opened by and group
# Delegates

## Self-Service
- Homepa
- Service Catalog
- Knowledge
- Help the Help Desk
- Create New Incident
- My Open Incidents
- Watched Incidents
- My Profile
- Delegates
- Take Survey

## Delegates Table

<table>
<thead>
<tr>
<th>Start</th>
<th>End</th>
<th>User</th>
<th>Delegate</th>
<th>Approvals</th>
<th>Assignments</th>
<th>CC Notifications</th>
<th>Meeting Invitations</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012-04-03 10:17:45</td>
<td>2020-04-06 18:59:59</td>
<td>Michael Okrent</td>
<td>Mary-Kay Kaminski</td>
<td>true</td>
<td>true</td>
<td>true</td>
<td>true</td>
</tr>
</tbody>
</table>

## Save & Exit
All lists, in the upper left corner, have a gear button. Pressing this brings about the personalized list options screen:
Personalized Lists

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.
Users can run filters on ANY list. 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)
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
Try it! Now its your turn!

Steps to be performed:

1. Sort a by a column
2. Personalize a list with fields relevant to you
3. Create a filter, save it, and apply it to a different list of incidents
Course Agenda

- Introduction
- ITIL and ServiceNow Concepts
- ServiceNow Navigation
- Working with Incidents
- Break
- Establishing Relationships
- Working with Incidents
- Modifying Lists
- Service Requests
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.
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.
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.
Finding Approvals

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.
Finding Approvals

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.
**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
The service catalog has a few lists users may find helpful:
Requests: A list of all open requests
Items: A list of all open request items
Tasks: A list of all open catalog tasks
Case 3 Request

- Yesterday you reported an incident because you couldn’t log into your laptop. Today you are having a similar problem but understand what caused it.
- The issue is the Caps Lock was on. Your password was locked. You decide to put in a service request for a password reset.
Service Catalog Request

- Go to the navigation pane.
- Open Self-Service, then Service Catalog
- Or
- Service Catalog, then Catalog
<table>
<thead>
<tr>
<th><strong>Who is the request for?</strong></th>
<th>Michael Okrent</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>When do you need this by?</strong></td>
<td>2012-04-04</td>
</tr>
<tr>
<td><strong>What type of request is this?</strong></td>
<td>Password - Reset</td>
</tr>
<tr>
<td><strong>Select the Request</strong></td>
<td>Request to unlock account</td>
</tr>
<tr>
<td><strong>Does this require an approval?</strong></td>
<td>No</td>
</tr>
<tr>
<td><strong>Select an Assignment Group</strong></td>
<td>YSS Client Accounts</td>
</tr>
<tr>
<td><strong>Short Description</strong></td>
<td>Unable to log on to my Windows 7 Laptop</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>Tried 3 times and realized num-lock was off</td>
</tr>
</tbody>
</table>
Submit Order

**Shopping Cart**

<table>
<thead>
<tr>
<th>Item</th>
<th>Delivery Time</th>
<th>Price (ea.)</th>
<th>Quantity</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal ITS Request</td>
<td>2 Days</td>
<td>$0.00</td>
<td>1</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

**Requested for:** Michael Okrent

**Deliver to:**

**Special instructions**

Please reset ASAP I don't need my laptop until 3pm today.

**Back to Catalog**

**Submit Order**
Order Submitted

Your request number is REQ0010045, which you can use to refer to this request in future interactions with the service desk.

You may also bookmark the following link to get back to REQ0010045.

Note that clicking on the bookmark link (above) will simply take you back to this screen.

<table>
<thead>
<tr>
<th>Number</th>
<th>Description</th>
<th>Delivery Date</th>
<th>Stage</th>
<th>Price (ea.)</th>
<th>Qty</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>RITM0010045</td>
<td>Internal ITS Request</td>
<td>2012-04-07</td>
<td>Approved</td>
<td>$0.00</td>
<td>1</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Manager - 2 Days</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>(Completed)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Fulfilment - 1 Day</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>(In progress)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Completed</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Delivery Information

Estimated Delivery Date of Complete Order: 2012-04-07
Optional: Review Request – Click Request Number
Displays Details of Request

![ServiceNow IT Service Management Suite - Windows Internet Explorer](https://yaletraining.service-now.com/navpage.do)

Welcome: Michael Okrent

**Request**

<table>
<thead>
<tr>
<th>Number</th>
<th>Requested for</th>
<th>Location</th>
<th>Due date</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>REQ0010045</td>
<td>Michael Okrent</td>
<td></td>
<td>2012-04-07 16:00:00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Opened:** 2012-04-04 11:00:32
**Opened by:** Michael Okrent

**Request state:** Approved
**Approval:** Approved

**Contact Type:** None

**Related Links**
- Show Workflow
- Workflow Context

**Requested Items (1)**

<table>
<thead>
<tr>
<th>Number</th>
<th>Quantity</th>
<th>Item</th>
<th>Due date</th>
<th>Price</th>
<th>Assigned To</th>
<th>Stage</th>
</tr>
</thead>
<tbody>
<tr>
<td>RTM0919046</td>
<td>1</td>
<td>Internal ITS Request</td>
<td>2012-04-07 16:00:00</td>
<td>0.00</td>
<td></td>
<td>Manager - 2 Days (Completed)</td>
</tr>
</tbody>
</table>

**Stage:**
- Fulfillment - 1 Day (in progress)
- Completed
I’m a member of YSS Client Accounts

Assume Client Accounts reset the password. Now they go to Service Now to record it in the ticket.
I clicked on the task
Completed the Task – Save and Exit
Tracking Time in Requests

Assess or Scope Task. Modify Due Date if necessary

Activity

2011-11-17 10:50:18  Paul DiBello - Changed: Impact, Priority
Impact: 3 - Low
Priority: 4 - Average

Time Worked (1)

Comments | Time in seconds | Time worked | Type | User
---|---|---|---|---
(empty) | 194 | 3 Minutes | Michael Okrent
• Create an Incident and resolve on first call
• Enter time worked on an Incident
• Reassign an Incident
• Resolve an Incident
• Tag an incident for a potential KB article
• Create a Major Incident
• Create a new incident without resolving on first call
Create an Incident and resolve on first call

- Create an incident record
- Select “resolved” in incident state drop-down
- Validate with the user that the incident is resolved (verbal) and change the incident state to resolved
- Enter resolution information
- Right click and select “save and stay”
- Validate time worked on incident. If incorrect update
- Press “save and exit”
Enter time worked on an Incident

- Open the appropriate incident record
- Select the “time worked” tab (at bottom of screen)
- Select appropriate task or new
- Enter time worked
- Select type from pull down menu
- Enter additional comments as necessary
- Press “save and exit”
Reassign an incident

- Select incident
- Select a new assignment group from the pop-up window
- Select the magnifying glass icon next to the assigned to field
- Select the appropriate name from the pop-up window
- Select “save and stay” from blue bar or Press “save and exit”
Resolve an Incident

- Open an incident for resolution
- Select the resolved in the incident state drop down
- Click on the Resolved Information Tab
- Select the appropriate resolve code from the pull-down
- Enter the resolution in resolved notes.
- Complete other required fields
- Press “save and exit” –
- ServiceNow will send email to client that incident has been resolved.
Tag an incident for a potential KB article

- Open a resolved incident record
- Click on Knowledge checkbox
- Change Incident state to Closed
- Press “save and exit”
- Incident comments will be sent to KB Open Submissions

From a incident form (or any other task form), simply clicking the Knowledge Flag will create a draft knowledge article. This allows knowledge generated from solving a problem to remain easily accessible in the system, reducing the amount of repeat incidents.
Create a Major Incident

- Create an Incident record
- Select 1-High from the impact drop down
- Select 1-High from the urgency drop down
  - Priority changes to Major
- Right click the “save and stay” or press “save and exit”
Create a new incident without resolving on first call

- Expand incident arrow to expand the application navigator (left column)
- Select create new
- Search or select a client by name or NetID
- Complete required fields
- Enter short description, search for suggested knowledge articles by clicking on the book icon.
- Hover over the client name information icon, view the correct assignment group and contract for the client.
- Enter the assignment group
- Enter customer visible comments as needed
- Enter work tasks as appropriate
- Press “save and exit”
- Observe that the incident is in the open list