

# **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



- 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**

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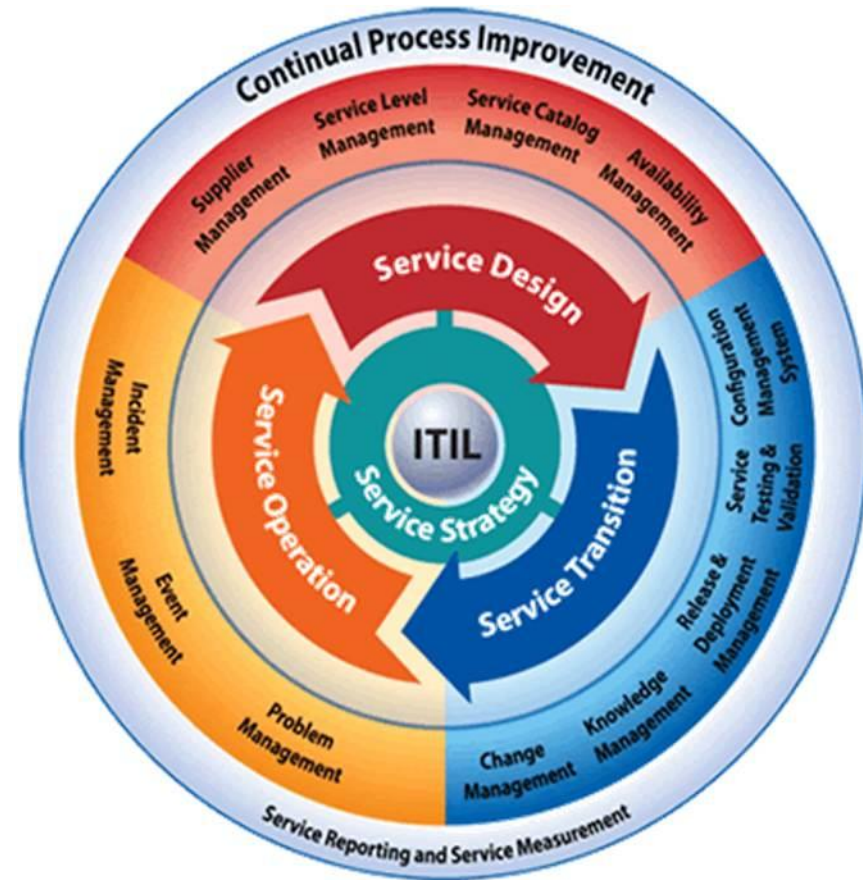
Modifying Lists

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



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

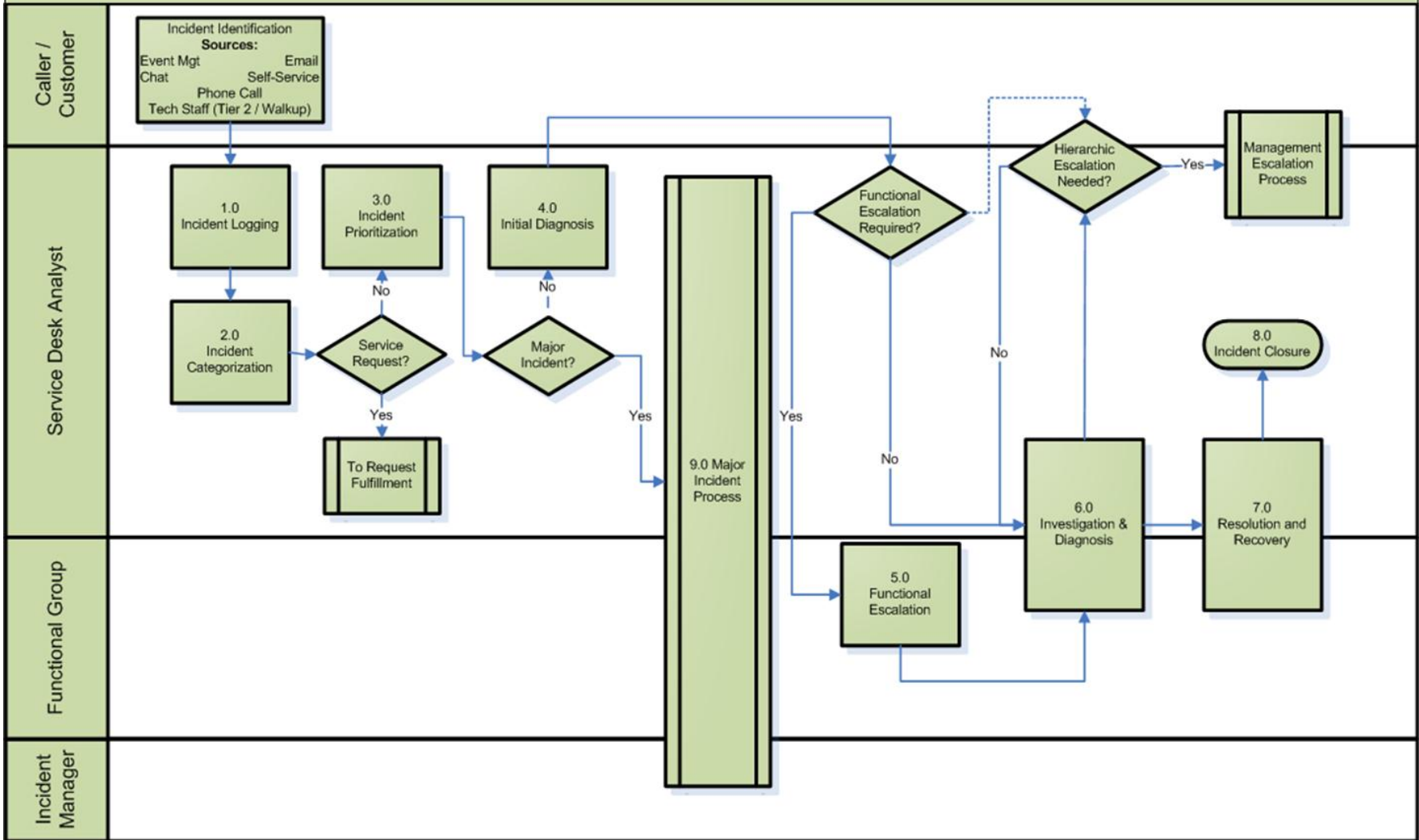
CMDB = Configuration Management Database

CI= Configuration Item

<b>Incident Manager</b>	<p><i>Oversee day to day process execution.</i></p> <p><i>Often the Service Desk Manager.</i></p> <p><i>Manages major incidents until the appropriate situation manager is identified.</i></p>
<b>Situation Manager</b>	<p><i>Manages and owns major incidents.</i></p>
<b>Service Desk Manager</b>	<p><i>Manages the service desk function, including staffing management activities.</i></p> <p><i>Provides guidance to Service Desk Analysts.</i></p>
<b>Incident Process Owner</b>	<p><i>Owns the process end-to-end, including the RACI, process &amp; procedural steps, role &amp; definitions.</i></p> <p><i>Accountable for maturing and evolving the process, based on monthly/quarterly/yearly review of process KPIs.</i></p> <p><i>Adjusts the process to address performance or changing business needs.</i></p>
<b>Service Desk Site Lead</b>	<p><i>Responsible for the operations of Service Desk Analysts that are geographically disperse, reporting to the Service Desk Manager.</i></p>
<b>Service Desk Analyst</b>	<p><i>Logs incidents.</i></p> <p><i>Provides initial diagnosis.</i></p> <p><i>Resolves incidents at first point of contact if possible.</i></p> <p><i>Escalates incidents.</i></p> <p><i>Owns non-major incidents.</i></p>
<b>Caller / Customer</b>	<p><i>The end user having or reporting the service interruption.</i></p>
<b>Functional Group – Queue Manager</b>	<p><i>Assigns incidents to individual Tier 2+ Analysts in the functional group.</i></p> <p><i>Monitors and manages support resolution performance.</i></p> <p><i>May directly manage (reporting manager) the day to day activities of Tier 2+ analysts outside of process activities.</i></p>
<b>Functional Group – Tier 2+ Analyst</b>	<p><i>Group of technical support experts that will handle issues escalated by the Service Desk</i></p> <p><i>–For example, a Network Engineer.</i></p> <p><i>Receive process direction for a functional group queue manager, staff management from a reporting manager.</i></p>

# Incident Lifecycle Overview

## Best Practice Incident Management Process



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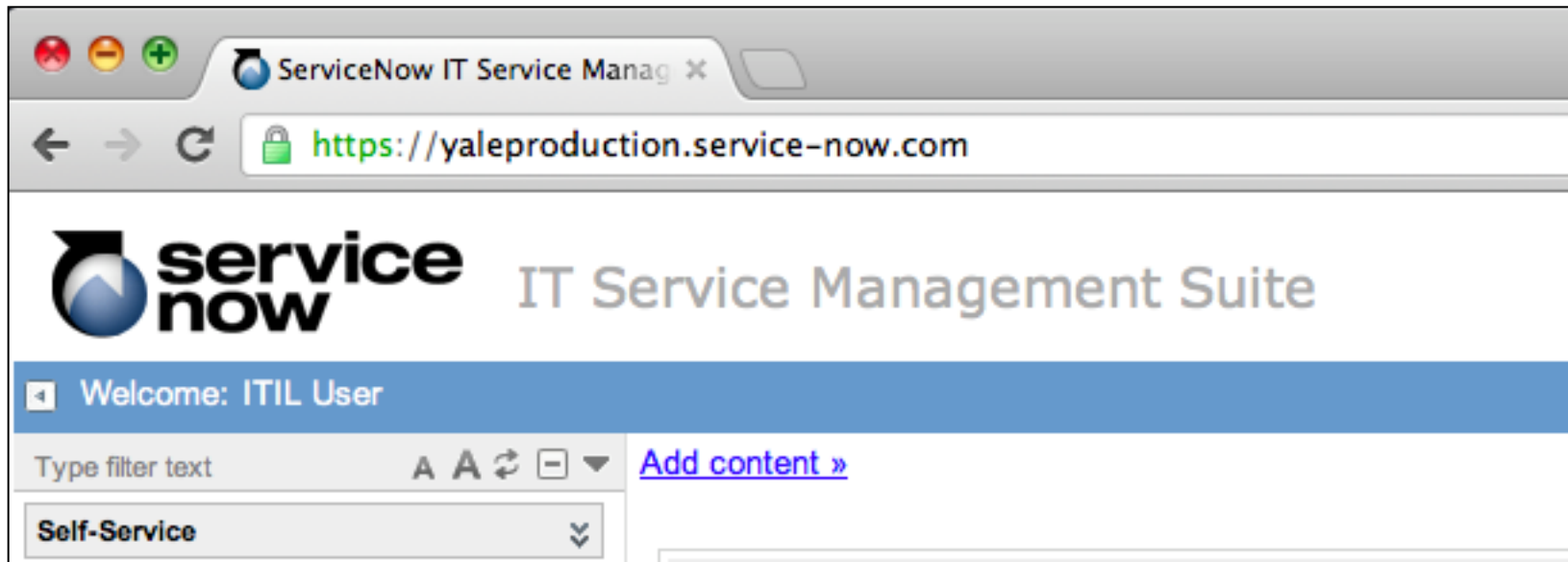


After completing this module, you will be able to:

**Objectives**

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

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

The screenshot displays the Yale IT Service Management Suite interface. At the top left, the logo 'Yale IT Service Management Suite' is visible. The user is logged in as 'Mary-Kay Kaminski'. A 'Bookmark and pane-based UI help' window is open on the left, providing instructions on how to use the interface's features. The main content area shows the 'ITIL Homepage' with an 'Advanced search' bar. Below the search bar, there are two incident cards, each with a 'Short Description' section containing the text 'Printer intermittent' and 'tv in room 47 needs to be replaced'. A 'Priority 1 Incidents' section is also present, with a link to 'View all active Incidents'. A 'Quick Links' section is located at the bottom right, listing various resources like 'Getting Help from ITS' and 'ITS Home Page'. The bottom of the screen shows a navigation menu with options like 'Change', 'Configuration', 'Service Catalog', 'Reports', 'BSM Map', and 'Social IT'. The system tray at the bottom indicates 'Done' and 'Internet | Protected Mode: On'.

# ServiceNow Default Homepage

The screenshot shows the ServiceNow ITIL Homepage interface. Red callout boxes with arrows point to the following elements:

- Navigation Search:** Points to the search bar at the top right.
- Left Hand Toolbar:** Points to the vertical navigation menu on the left side.
- Global Search:** Points to the search bar in the top right header area.
- Bookmark bar:** Points to the browser's address bar on the left.
- Main Page:** Points to the central content area containing incident lists.

The main content area includes:

- Knowledge Search:** A search bar with "Advanced search" options.
- Can We Help You?:** A section with links for "Create a New Incident" and "Internal ITS Request".
- My work:** A table listing incidents with columns for Number and Short Description.
- Priority 1 Incidents:** A section with a link to "View all active Incidents".
- Quick Links:** A list of links including "Getting Help from ITS", "ITS Home Page", "ITS News", "ITS Policies", and "ITS System Status Page".

Number	Short Description
CHG0000017	Printer intermittent
CHG0000045	tv in room 47 needs to be replaced
CTASK0000029	Implement Task

Main page is where lists, forms, and homepages will be displayed

The screenshot shows the main page of the Yale IT Service Management Suite. The header includes the Yale logo, the text "IT Service Management Suite", and a "Switch to the old UI" link. Below the header, a blue bar displays "Welcome: ITIL USER" and a "Logout" button. The main content area features a sidebar on the left with navigation options like "Self-Service", "Service Desk", "New Call", "Callers", "Incidents", "Knowledge", "My Work", "My Groups Work", and "My Approvals". The central area shows a table of incidents with columns for Incident, Client, Short Description, Category, IT Component, Category L1, Priority, and Incident state. The table lists three incidents, all with a priority of "5 - Low" and a state of "Assigned".

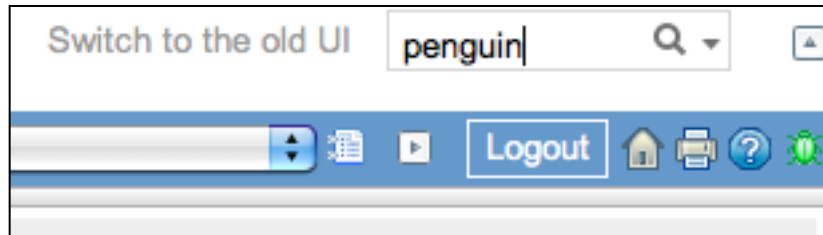
Incident	Client	Short Description	Category	IT Component	Category L1	Priority	Incident state
<a href="#">INC0011408</a>		Planned Outage RFC: CHG0030387				5 - Low	Assigned
<a href="#">INC0011407</a>		Planned Outage RFC: CHG0030022				5 - Low	Assigned
<a href="#">INC0011410</a>		Planned Outage RFC: CHG0030418				5 - Low	Assigned

Main page content changes, but sidebars stay the same

The screenshot shows the same main page of the Yale IT Service Management Suite, but with the incident form open. The sidebar remains the same. The central area displays a form for editing an incident. The form has a header with "Incident" and "Required field" labels, and buttons for "Save & Exit", "Assign to me", "Mark as Duplicate", and "Resolve Incident". Below the header, there are tabs for "New", "Assigned", "In Progress", "On Hold", "Resolved", and "Closed". The form fields include "Incident state" (set to "New"), "Incident" (set to "INC0011419"), "Client", "Contact", "Notify" (set to "Email"), "Opened" (set to "2012-03-07 14:44:18"), "Opened by" (set to "ITIL USER"), "Impact" (set to "3 - Low"), "Urgency" (set to "3 - Low"), and "Priority" (set to "5 - Low").

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:

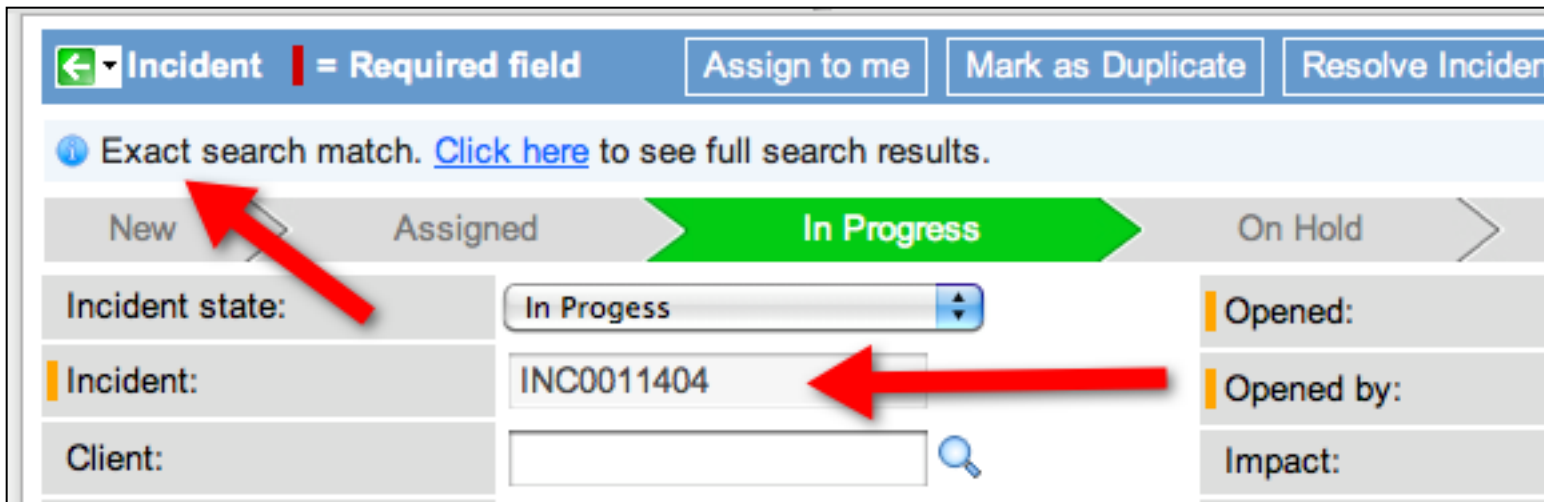
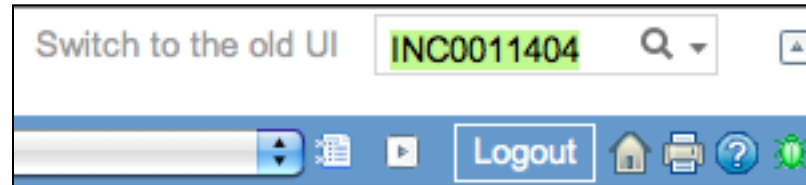
A screenshot of the ServiceNow search results page. The search bar at the top contains 'penguin'. Below the search bar, there are several sections of results. The first section is 'Incidents (1)'. Below that is a section for 'Tasks (1 match)' with a note that there are no matches for 'Changes, Change Tasks, Problems, Requests, Catalog Tasks, Tickets'. The main section is 'Incidents - 1', which contains a table with one row of results. A red arrow points to the 'Short Description' column of this row. Below the table is a section for 'Policy (No matches)' with a note that there are no matches for 'Business Rules, UI Actions, Client Scripts, UI Policies, Notifications, System Properties'.

Incident	Client	Short Description	Category	IT Component Category L1	Priority	Incident state	A
<a href="#">INC0011404</a>		Test - Penguin			5 - Low	In Progress	<a href="#">Fruit</a>

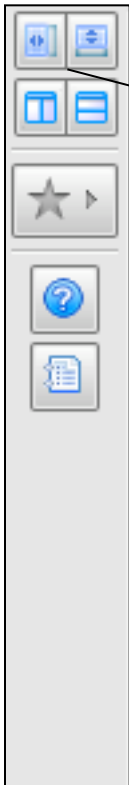
The global search can be used to search ALL data within ServiceNow, not just a specific module.

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.

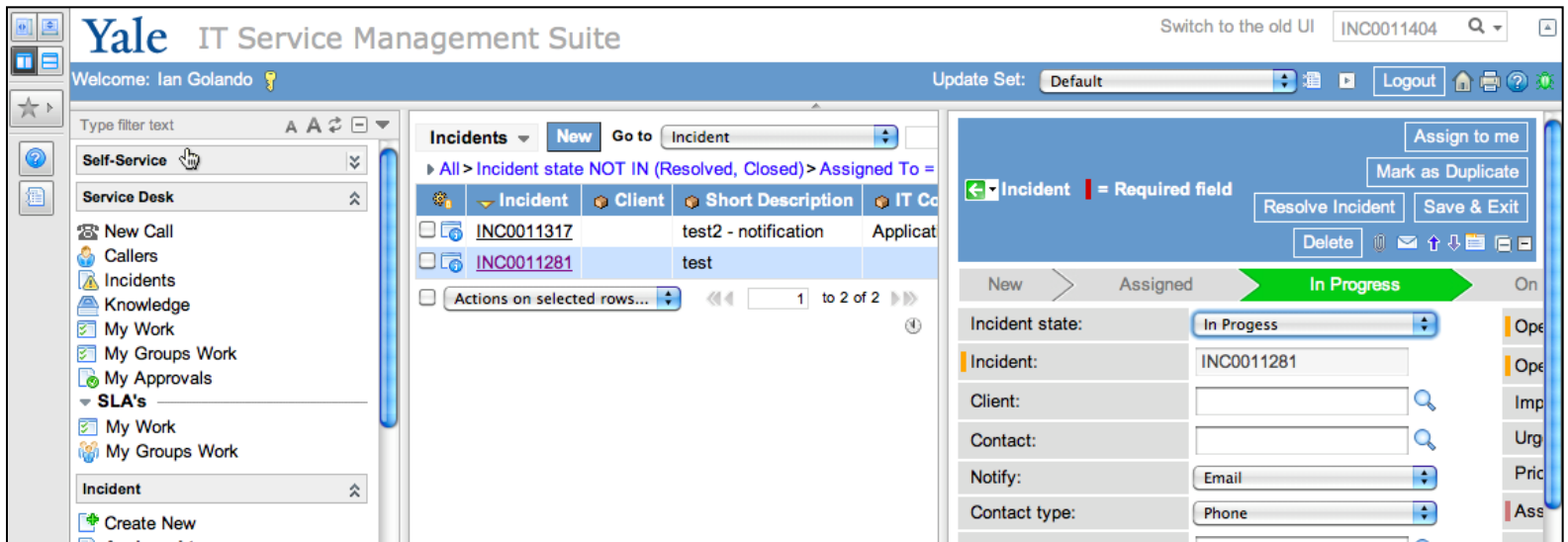


The top 2 buttons allow the user to collapse the left hand navigation toolbar (left button) and collapse the top header (right button)



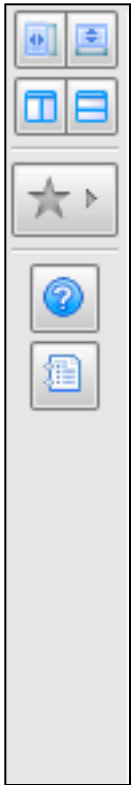
The next two buttons allow the user to split their mainpage vertically (left) and horizontally (right). Lists will be displayed on the left/top and forms will be displayed on the right/bottom.

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



Yale IT Service Management Suite

Welcome: Ian Golando

Type filter text

Self-Service

Service Desk

New Call

Callers

Incidents

Knowledge

My Work

Incidents New Go to Incident

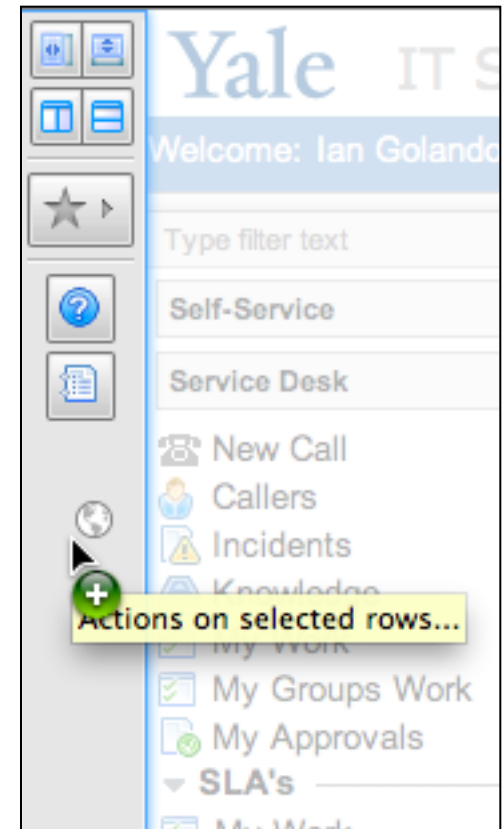
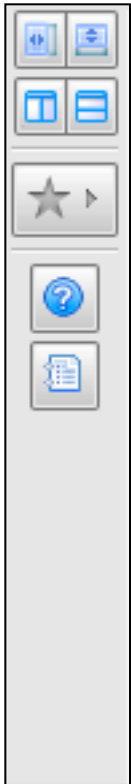
All > Incident state NOT IN (Resolved, Closed) > Assigned To

Incident	Client	Sh	Description	IT
<input type="checkbox"/> <a href="#">INC0011317</a>			test2 - notification	Appli
<input type="checkbox"/> <a href="#">INC0011281</a>			test	

Actions on selected rows...

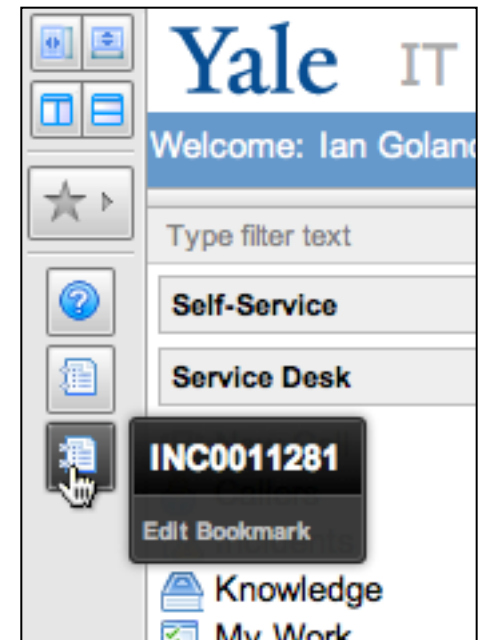
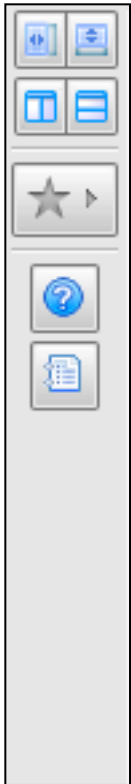
Users can add bookmarks to the bookmark bar, and the star button is used to manage them. To add bookmarks:

2. Click and drag the number over to the bookmark bar

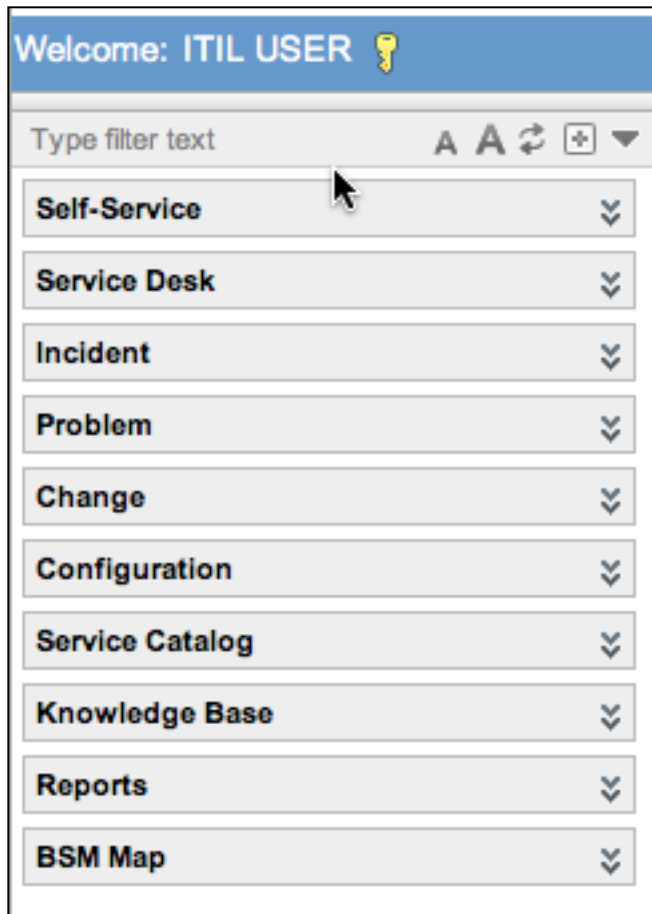


Users can add bookmarks to the bookmark bar, and the star button is used to manage them. To add bookmarks:

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.



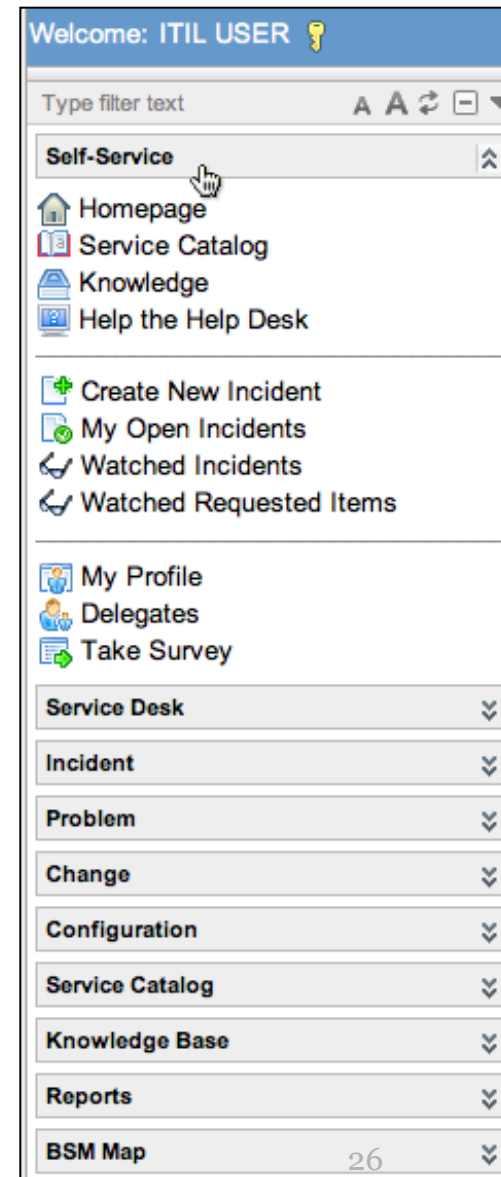
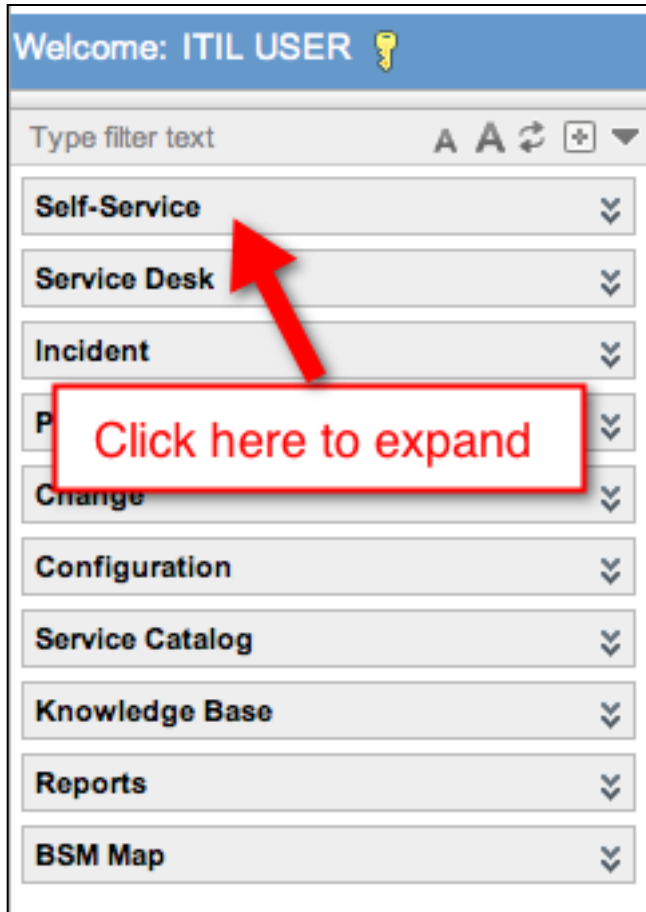
The left hand navigation bar will display all modules and processes the user has access to. Key features:



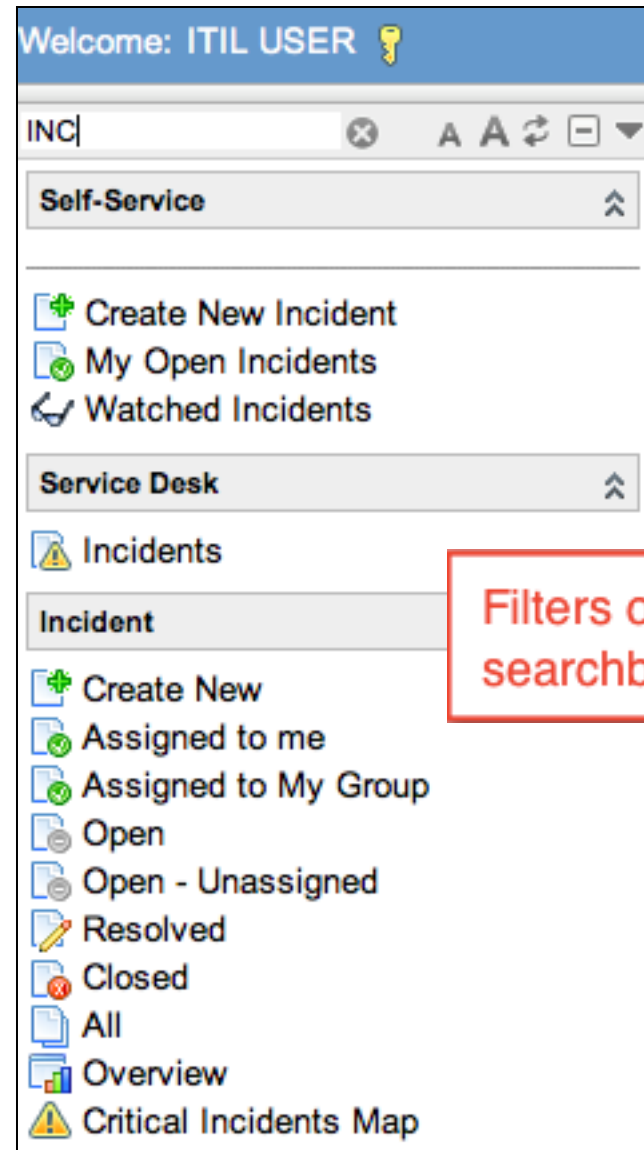
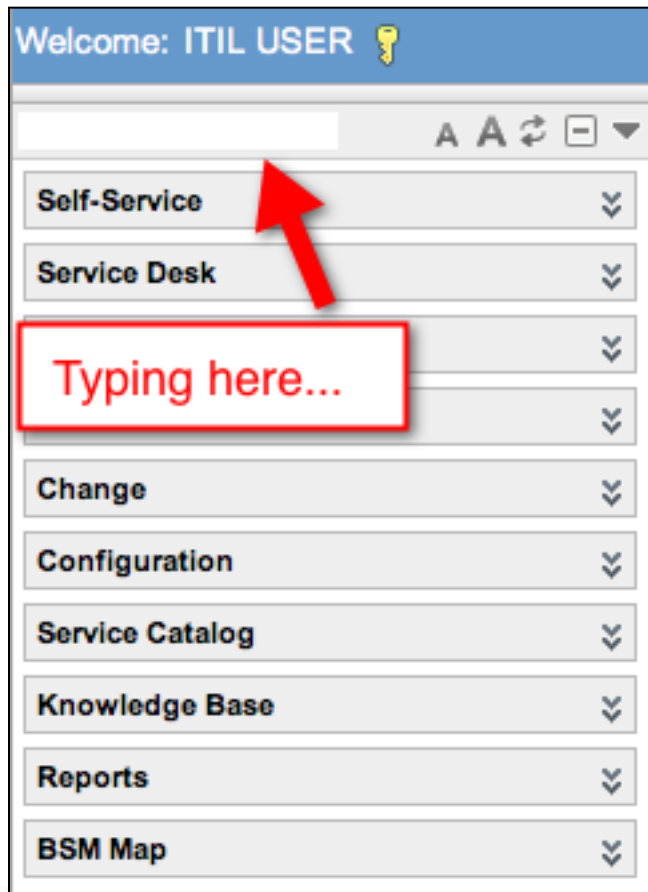
Clicking any application header will collapse/expand it

Typing in filter text box will filter out all content that does not have the search terms

Expanding:



Filtering:



### 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 screenshot shows the ServiceNow IT Service Management Suite interface. The main content area is titled 'My ITIL Homepage' and features a 'Refresh: Off' button and a 'Switch to page...' dropdown. A 'My Groups Work' sidebar is visible on the left. A modal dialog box titled 'Add content' is open, displaying a list of categories and a table of 'My Work' items.

**Add content**

- Performance Graph Controls
- Performance Graphs
- Service Catalog
- System Applications
- World Clocks
- Gauges
- Content Blocks
- Diagnosics
- Text Search
- Filters
- Other
- Problem
- Release
- Request
- Requested Item
- Server
- Software License
- Survey Response
- Sys trend
- Task
- ITIL Summary Counts
- My Groups Work
- My Work**
- Open and Critical Work
- Open Items
- Open Items Assigned to my Group
- Open Items by Escalation
- Open Items that are Unassigned (2)
- Unassigned Work
- Unassigned Work (My Groups)

**My Work**

Number	State	Short Description
<a href="#">INC0011558</a>	Open	Can't launch X-Win32
<a href="#">CHG0030675</a>	Open	update to Service Now training slides
<a href="#">CHG0030674</a>	Open	impact of schedule on submission
<a href="#">INC0011559</a>	Open	Can't launch X-Win32
<a href="#">PRB0040711</a>	Open	Network Printer not printing large documents

Buttons: Add here

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

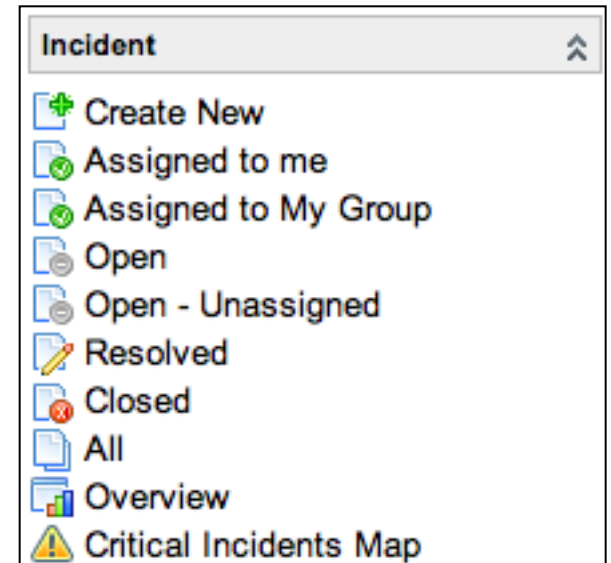
**Open:** A list of all open (non-resolved or closed) incidents

**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

Incidents ▾ **New** Go to Incident

▸ All > Assigned To = > Incident state NOT IN (Resolved, Closed)

	 Incident	 Client	 Short Description	 Category	 IT Component Category L1
<input type="checkbox"/> 	<a href="#">INC0011410</a>		Planned Outage RFC: CHG0030418		
<input type="checkbox"/> 	<a href="#">INC0011409</a>		Planned Outage RFC: CHG0030414		
<input type="checkbox"/> 	<a href="#">INC0011408</a>		Planned Outage RFC: CHG0030387		
<input type="checkbox"/> 	<a href="#">INC0011407</a>		Planned Outage RFC: CHG0030022		
<input type="checkbox"/> 	<a href="#">INC0011404</a>		Test - Penguin		
<input type="checkbox"/> 	<a href="#">INC0011395</a>		Issue with email		

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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

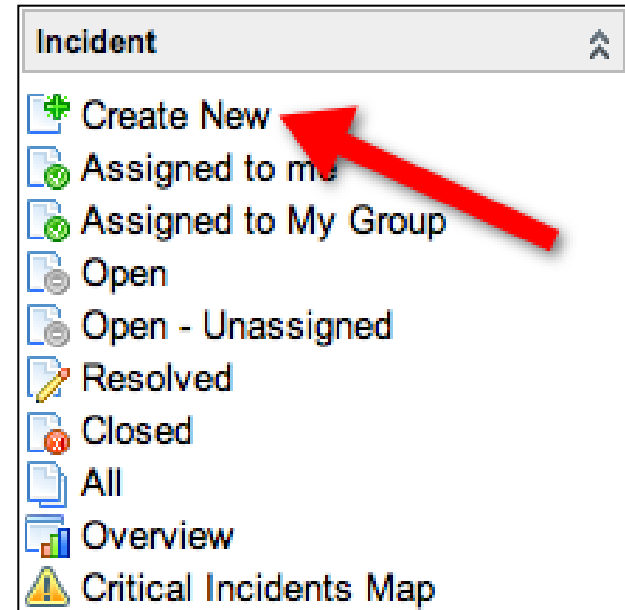
## Creating New Incidents

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:

Navigate to the Service Desk Application  
Select New Call

The user will be taken to the new call screen. The new call screen has 5 fields:

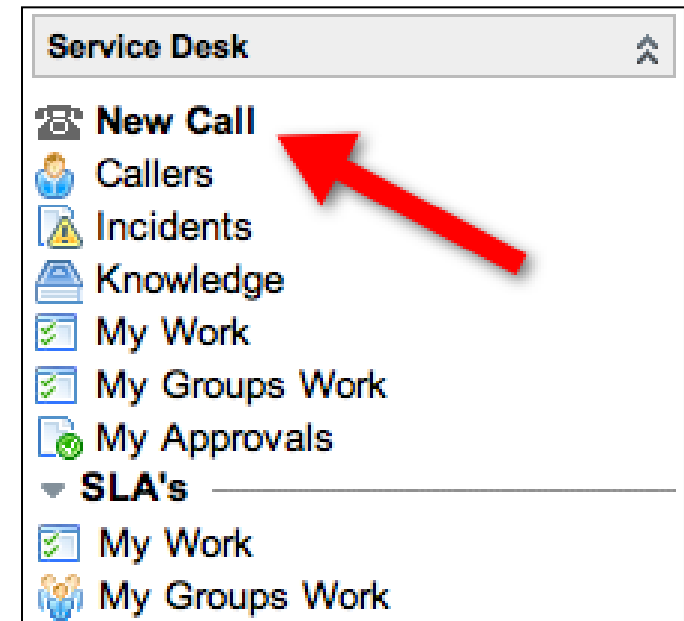
**Caller:** Can use NetID or Search

**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.

 **New Call**

**Initial Contact**


**Caller**  
 

**Location**  
 

**Comments** - +  
[▶ More information](#)

**Call type**  
 Incident  
 Request

**Short description**

 **Submit**

Go to  
This  
Screen  
Now.

# New Call Screen

The screenshot shows a web browser window displaying the ServiceNow IT Service Management Suite interface. The browser's address bar shows the URL <https://yaletraining.service-now.com/navpage.do>. The page title is "Yale IT Service Management Suite". A navigation menu on the left lists various categories such as "Self-Service", "Service Desk", "New Call", "Callers", "Incidents", "Knowledge", "My Work", "My Groups Work", "My Approvals", "SLA's", "Incident", "Problem", "Change", "Configuration", "Service Catalog", "Reports", "BSM Map", and "Social IT". The "New Call" section is active, showing a form for creating a new call. The form includes fields for "Initial Contact", "Client Name" (with the value "John Smith"), "Contact Name", "Short description" (with the value "Unable to log into his Windows PC"), "Comments" (with the value "Received message that his password was locked"), and "Call type" (with radio buttons for "Incident" and "Request"). A "Submit" button is located at the bottom right of the form. The browser's taskbar at the bottom shows the system clock as 1:08 PM on 4/3/2012.

# Data – Case 1

ServiceNow IT Service Management Suite - Windows Internet Explorer

https://yaletraining.service-now.com/navpage.do

File Edit View Favorites Tools Help

Share Browser WebEx Convert Select Google Search More

YaleInfo: The Yale Universi... iGoogle Log on to the Blackboard ... Okrent, Michael - Outlook ... ServiceNow IT Service ...

## Yale IT Service Management Suite

Welcome: Erika Reilly Logout

Type filter text

- Self-Service
- Service Desk
  - New Call
    - Callers
    - Incidents
    - Knowledge
    - My Work
    - My Groups Work
    - My Approvals
    - SLA's
      - My Work
      - My Groups Work
  - Incident
  - Problem
  - Change
  - Configuration
  - Service Catalog
  - Reports
  - BSM Map
  - Social IT

Incident = Required field

Assign to me Mark as Duplicate Save & Exit

New Assigned In Progress On Hold Resolved Closed

Incident State:	Assigned	Opened:	2012-04-03 12:17:02
Incident:	INC0011557	Opened by:	Erika Reilly
Client:	John Smith	Impact:	3 - Low
Contact:	Michael Okrent	Urgency:	3 - Low
Notify:	Email	Priority:	5 - Low
Contact Type:	Phone	Assignment Group:	CTS Service Desk
Location:		Assigned To:	
IT Business Service:	Personal Productivity	Watch List:	
Incident Type:	Service Interruption	Knowledge:	
IT Provider Service:	Personal Computing	Time Worked:	00:10:55 / 00:10:55
IT Component Category L1:	Hardware		
IT Component Category L2:	-- None --		
IT Component Category L3:	-- None --		
Short Description:	Unable to log into Windows PC		

Notes Related Records Resolve Information

Notes

Description:

Internet | Protected Mode: On 100%

12:28 PM 4/3/2012

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

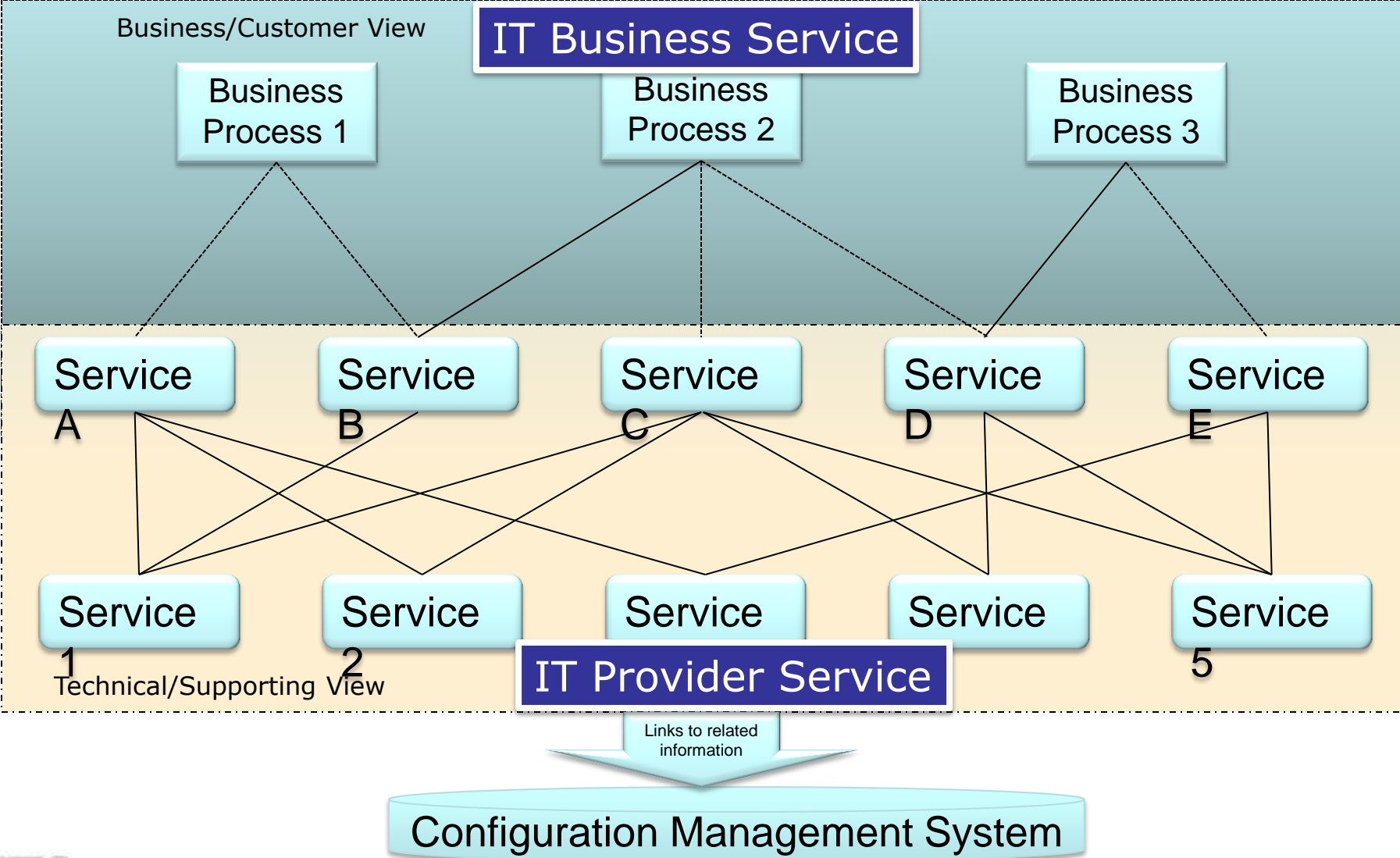
A rectangular form field with a light gray background and a thin black border. On the left side, there is a vertical red bar. To the right of the bar, the text "Short description:" is displayed in a dark gray font.

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.

A rectangular form field with a light gray background and a thin black border. On the left side, there is a vertical yellow bar. To the right of the bar, the text "Incident:" is displayed in a dark gray font.

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.

A rectangular form field with a light gray background and a thin black border. On the left side, there is a vertical green bar. To the right of the bar, the text "Notify:" is displayed in a dark gray font.



# IT Business Service– Case 1

The screenshot displays the ServiceNow IT Service Management Suite interface within a Windows Internet Explorer browser. The browser's address bar shows the URL <https://yaletraining.service-now.com/navpage.do>. The page title is "Yale IT Service Management Suite".

The interface is divided into several sections:

- Left Navigation Panel:** Contains a "Type filter text" input and a list of navigation items including "Self-Service", "Service Desk", "New Call", "Callers", "Incidents", "Knowledge", "My Work", "My Groups Work", "My Approvals", "SLA's", "Incident", "Problem", "Change", "Configuration", "Service Catalog", "Reports", "BSM Map", and "Social IT".
- Incident Record Header:** Shows the incident state as "Assigned" (highlighted in green) and includes buttons for "Assign to me", "Mark as Duplicate", and "Save & Exit".
- Incident Details:** A form with the following fields:
  - Incident State: Assigned
  - Incident: INC0011557
  - Client: John Smith
  - Contact: Michael Okrent
  - Notify: Email
  - Contact Type: Phone
  - Location: (empty)
  - IT Business Service: Personal Productivity
  - Incident Type: Service Interruption
  - IT Provider Service: Personal Computing
  - IT Component Category L1: Hardware
  - IT Component Category L2: -- None --
  - IT Component Category L3: -- None --
  - Short Description: Unable to log into Windows PC
- Metadata:** Fields on the right side of the record:
  - Opened: 2012-04-03 12:17:02
  - Opened by: Erika Reilly
  - Impact: 3 - Low
  - Urgency: 3 - Low
  - Priority: 5 - Low
  - Assignment Group: CTS Service Desk
  - Assigned To: (empty)
  - Watch List: (empty)
  - Knowledge: (empty)
  - Time Worked: 00:10:55 / 00:10:55
- Notes Section:** A section titled "Notes" with a "Description" field containing a redacted area (indicated by a blue box).

- **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  $\geq$ 100

Low = 1	Medium <100	High $\geq$ 100
---------	-------------	-----------------

- **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  $\leq$ 24hrs, High  $\leq$  Less than 4hrs

Low $>$ 24Hrs	Medium $<$ 24Hrs	High $\leq$ 4hrs
---------------	------------------	------------------

- **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

Urgency		Incident Matrix				
High	Incident that requires resolution before 4 hours.	Impact	High	3	2	1
Medium	Escalated service request or Incident that requires resolution within 24 hours.		Medium	4	3	2
Low	Standard service request or Incident that does not require resolution within 24 hours.		Low	5	4	3
Impact						
High	Affects greater than 100 users			Low	Medium	High
Medium	Affects a single user performing patient care or less than 100 users.			Urgency		
Low	Affects a single user					

Incident Prioritization Values		
Value	Description	Notes
1	Major Incident	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.
2	Critical	Issue is affecting patient care or that requires continuous effort, even after normal business hours.
3	High	Client is unable to work or their work is severely impaired or an issue that requires continuous effort during normal business hours.
4	Average	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
5	Low	Client is able to continue work though slightly impaired. Standard Service Request

# Impact Urgency & Priority Case 1

The screenshot displays the ServiceNow IT Service Management Suite interface within a Windows Internet Explorer browser. The browser's address bar shows the URL <https://yaletraining.service-now.com/navpage.do>. The page title is "Yale IT Service Management Suite".

The interface includes a navigation pane on the left with categories such as "Self-Service", "Service Desk", "New Call", "Callers", "Incidents", "Knowledge", "My Work", "My Groups Work", "My Approvals", "SLA's", "Incident", "Problem", "Change", "Configuration", "Service Catalog", "Reports", "BSM Map", and "Social IT".

The main content area shows an incident record for "INC0011557". The incident state is "Assigned", and the client is "John Smith". The contact is "Michael Okrent". The incident type is "Service Interruption", and the provider service is "Personal Computing". The component categories are "Hardware", "-- None --", and "-- None --". The short description is "Unable to log into Windows PC".

The incident record is displayed in a workflow view with stages: New, Assigned (highlighted in green), In Progress, On Hold, Resolved, and Closed. The "Assigned" stage is active, and the incident is currently assigned to Erika Reilly.

Key fields and values for the incident include:

- Incident State: Assigned
- Incident: INC0011557
- Client: John Smith
- Contact: Michael Okrent
- Notify: Email
- Contact Type: Phone
- Location: (empty)
- IT Business Service: Personal Productivity
- Incident Type: Service Interruption
- IT Provider Service: Personal Computing
- IT Component Category L1: Hardware
- IT Component Category L2: -- None --
- IT Component Category L3: -- None --
- Short Description: Unable to log into Windows PC
- Opened: 2012-04-03 12:17:02
- Opened by: Erika Reilly
- Impact: 3 - Low
- Urgency: 3 - Low
- Priority: 5 - Low
- Assignment Group: CTS Service Desk
- Assigned To: (empty)
- Watch List: (empty)
- Knowledge: (empty)
- Time Worked: 00:10:55 / 00:10:55

The "Notes" section is currently empty, and the "Description" field is also empty. The interface includes various action buttons such as "Assign to me", "Mark as Duplicate", and "Save & Exit".

# Complete Notes – Case 1

The screenshot displays the ServiceNow IT Service Management Suite interface. The browser address bar shows the URL <https://yaletraining.service-now.com/navpage.do>. The page title is "Yale IT Service Management Suite". A navigation menu on the left includes options like "New Call", "Callers", "Incidents", "Knowledge", "My Work", "My Approvals", and "SLA's". The main content area shows an incident record with the following details:

- Incident** (Required field)
- Notes** tab selected
- Description:** Upon further troubleshooting discovered that NetID JS27 was locked by Information Security because their credentials were compromised
- Additional Comments (Customer visible):**
- Work Notes:**
- Activity** section showing a timeline of events:
  - 2012-04-03 13:03:58: Your Incident INC0011557 has been resolved. - Email sent. Sent to: chloe.turnbull@yale.edu, rick.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 to: rick.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. Work Note: Tried several times and couldn't remember my password

# Resolve Incident – Case 1

The screenshot displays the ServiceNow IT Service Management Suite interface within a Windows Internet Explorer browser. The browser's address bar shows the URL <https://yaletraining.service-now.com/navpage.do>. The page title is "Yale IT Service Management Suite".

The interface is divided into several sections:

- Left Navigation Panel:** Contains a "Type filter text" input and a list of navigation items including "Self-Service", "Service Desk", "New Call", "Callers", "Incidents", "Knowledge", "My Work", "My Groups Work", "My Approvals", "SLA's", "My Work", "My Groups Work", "Incident", "Problem", "Change", "Configuration", "Service Catalog", "Reports", "BSM Map", and "Social IT".
- Incident Form:** The main area displays an incident with the following details:
  - Incident State:** Resolved
  - Incident:** INC0011557
  - Client:** John Smith
  - Contact:** Michael Okrent
  - Notify:** Email
  - Contact Type:** Phone
  - Location:** (empty)
  - IT Business Service:** Personal Productivity
  - Incident Type:** Service Interruption
  - IT Provider Service:** Personal Computing
  - IT Component Category L1:** Hardware
  - IT Component Category L2:** -- None --
  - IT Component Category L3:** -- None --
  - Short Description:** Unable to log into Windows PC
- Right Panel:** Contains a list of incident attributes:
  - Opened:** 2012-04-03 12:17:02
  - Opened by:** Erika Reilly
  - Impact:** 3 - Low
  - Urgency:** 3 - Low
  - Priority:** 5 - Low
  - Assignment Group:** CTS Service Desk
  - Assigned To:** Philip Barello
  - Watch List:** (empty)
  - Knowledge:** (empty)
  - Time Worked:** 00:44:12 / 00:44:12
- Resolve Information Section:** Located below the incident details, it includes:
  - Resolved by:** (empty)
  - Resolved:** (empty)
  - Resolve Time:** (empty)
  - Resolve code:** Service Restored – Confirmed
  - Resolve Notes:** UNLOCKED (with a red lock icon)
- Notes:** A text area at the bottom contains the note: "Unlocked John Smith's NetID JS27 and helped them change their security questions and password after having them log into PC."

- 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

Yale IT Service Management Suite

Welcome: Kevin Brigham

Update Set: Default1 Logout

Switch to the old UI

Incident = Required field

Save & Exit Assign to me Mark as Duplicate

New Assigned In Progress On Hold Resolved Closed

Incident State: New

Incident: INC0000008

Client: [Red Box 3]

Contact: [Red Box 4]

Notify: [Red Box 4] Users New Go to Name Michael Okrent

Contact Type: [Red Box 4] All > Name >= michael okrent

	Name	First name	Last name	Email
mo4	Michael Okrent	Michael	Okrent	michael.okrent@yale.edu
mo6	Michael Okun	Michael	Okun	
(empty)	Michael Olenki	Michael	Olenki	
mjo29	Michael Ollins	Michael	Ollins	
mo334	Michael Olson	Michael	Olson	
mvo5	Michael Oneppo	Michael	Oneppo	
mao8	Michael Onnembo	Michael	Onnembo	
mo292	Michael Opsahl	Michael	Opsahl	
mbo6	Michael Oren	Michael	Oren	
mo282	Michael Oristaglio	Michael	Oristaglio	michael.oristaglio@yale.edu
mjo23	Michael Orlosky	Michael	Orlosky	
mpo6	MICHAEL OSBER	MICHAEL	OSBER	
mro5	Michael Osborne	Michael	Osborne	michael.osborne@yale.edu
mvo3	Michael Osier	Michael	Osier	michael.osier@yale.edu
mo64	Michael Osman	Michael	Osman	
mdo6	Michael Otremba	Michael	Otremba	michael.otremba@yale.edu
otsuka	Michael Otsuka	Michael	Otsuka	
(empty)	Michael Ouimet	Michael	Ouimet	
meo27	Michael Overton	Michael	Overton	
mco3	MICHAEL OWENS	MICHAEL	OWENS	

Notes

Description:

Additional Comments (Customer visible):

# Practice

## Complete Required Fields – IT Business Service

Incident = Required field

Save & Exit Assign to me Mark as Duplicate

New Assigned In Progress On Hold Resolved Closed

Incident State: New  
Incident: INC0000008  
Client: Michael Okrent  
Contact: Michael Okrent  
Notify: Email  
Contact Type: Phone  
Location: 25 SP 447B  
IT Business Service: **1**  
Incident Type: -- None --  
IT Provider Service:

Opened: 2012-04-14 08:25:36  
Opened by: Dawn Colonese  
Impact: 3 - Low  
Urgency: 3 - Low  
Priority: 5 - Low  
Assignment Group:  
Assigned To: Dawn Colonese  
Watch List:  
Knowledge:  
Time Worked: 00:05:44 / 00:05:44

IT Business Services New Go to Name 1 to 20 of 34

Name	Manufacturer
Banner	(empty)
BMS (AS400)	(empty)
BMS Web (2000)	(empty)
Central File Service	(empty)
Classes V2	(empty)
Classroom Productivity	(empty)
Computer Clusters	(empty)
Data Self Scan and Remediation	(empty)
Data Warehouse	(empty)
EliApps	(empty)
Email - Legacy	(empty)
EPIC	(empty)
ERP (Oracle)	(empty)
Express Shipping (Eship Global)	(empty)
FAMIS	(empty)
High Performance Computing	(empty)
IDX	(empty)
iExpense	(empty)
IRES	(empty)
My Pay and Info	(empty)

1 to 20 of 34 **2**

Name	Manufacturer
MyBenefits	(empty)
MyTime	(empty)
Other	(empty)
<b>Personal Productivity</b>	(empty) <b>3</b>
Research Storage	(empty)
SciQuest	(empty)
Service-Now	(empty)
Training Management System (TMS)	(empty)
Trapeze	(empty)
Yale Academic Commons (WordPress)	(empty)
Yale Portal	(empty)
YaleConnect	(empty)
YaleShare	(empty)
YNHH	(empty)

21 to 34 of 34

# Complete Required Fields - Incident Type

Incident | = Required field

Save & Exit | Assign to me | Mark as Duplicate

New | Assigned | In Progress | On Hold | Resolved | Closed

Incident State:	New	Opened:	2012-04-14 08:25:36
Incident:	INC0000008	Opened by:	Dawn Colonese
Client:	Michael Okrent	Impact:	3 - Low
Contact:	Michael Okrent	Urgency:	3 - Low
Notify:	Email	Priority:	5 - Low
Contact Type:	Phone	Assignment Group:	
Location:	25 SP 447B	Assigned To:	Dawn Colonese
IT Business Service:	Personal Productivity	Watch List:	
Incident Type:	-- None --	Knowledge:	
IT Provider Service:	Service Interruption	Time Worked:	00:10:36 / 00:10:36
IT Component Category L1:	Service Degradation		
IT Component Category L2:	Service Outage		
IT Component Category L3:	Service Event		
Asset/Device:			

Short Description:

Notes | Related Records | Resolve Information | QA | Security

Notes

Description:

Additional Comments (Customer visible):

Work Notes:

**1** (points to Incident Type dropdown)

**2** (points to Service Interruption)



Update Set: Default1 [Logout]

Incident | = Required field [Save & Exit] [Assign to me] [Mark as Duplicate]

New Assigned In Progress On Hold Resolved Closed

Incident State: New  
Incident: INC0000008  
Client: Michael Okrent  
Contact: Michael Okrent  
Notify: Email  
Contact Type: Phone  
Location: 25 SP 447B  
IT Business Service: Personal Productivity  
Incident Type: Service Interruption  
IT Provider Service: **1**

Opened: 2012-04-14 08:25:36  
Opened by: Dawn Colonese  
Impact: 3 - Low  
Urgency: 3 - Low  
Priority: 5 - Low  
Assignment Group:  
Assigned To: Dawn Colonese  
Watch List:  
Knowledge:  
Time Worked: 00:17:00 / 00:17:00

IT Component Category L1: -- None --  
IT Component Category L2: -- None --  
IT Component Category L3: -- None --  
Asset/Device:  
Short Description:

IT Provider Services **New** Go to Name |

Name	Manufacturer
Active Directory	(empty)
Alternate Central Authentication Service (ACAS)	(empty)
Central Authentication Service (CAS)	(empty)
Information Security	(empty)
Infrastructure Services	(empty)
NetID Service (Identity Management)	(empty)
Network	(empty)
Other	(empty)
<b>Personal Computing</b> <b>2</b>	(empty)
Shared Computing	(empty)
Software Library	(empty)
Telecom	(empty)

Notes  
Description:   
Additional Comments (Customer visible):   
Work Notes:

1 to 12 of 12  
1 to 12 of 12

# Practice - Complete Fields as appropriate – IT Component Category L1 – Ln

Incident | = Required field

Save & Exit | Assign to me | Mark as Duplicate

New | Assigned | In Progress | On Hold | Resolved | Closed

Incident State:	New	Opened:	2012-04-14 09:20:36
Incident:	INC0000009	Opened by:	Dawn Colonese
Client:	Michael Okrent	Impact:	3 - Low
Contact:	Michael Okrent	Urgency:	3 - Low
Notify:	Email	Priority:	5 - Low
Contact Type:	Phone	Assignment Group:	
Location:	25 SP 447B	Assigned To:	Dawn Colonese
IT Business Service:	Personal Productivity	Watch List:	
Incident Type:	Service Interruption	Knowledge:	
IT Provider Service:	Personal Computing	Time Worked:	00:33:34 / 00:33:34
IT Component Category L1:	-- None --		
IT Component Category L2:	-- None --		
IT Component Category L3:	Application Software		
Asset/Device:	Data		
Short Description:	Documentation		
	Facility		
	Hardware		
	Network		
	Process		
	Standards		
	Support Software		
	Virtual		

Notes | Related Records

Description:

Additional Comments (Customer visible):

Work Notes:

Save & Exit | Assign to me | Mark as Duplicate

**1** (next to IT Component Category L1 dropdown)

**2** (next to Hardware in IT Component Category L3 list)

# Practice - Complete Fields as appropriate

Incident = Required field

Save & Exit Assign to me Mark as Duplicate

New Assigned In Progress On Hold Resolved Closed

Incident State:	New	Opened:	2012-04-14 09:20:36
Incident:	INC0000009	Opened by:	Dawn Colonese
Client:	Michael Okrent	Impact:	3 - Low
Contact:	Michael Okrent	Urgency:	3 - Low
Notify:	Email	Priority:	5 - Low
Contact Type:	Phone	Assignment Group:	
Location:	25 SP 447B	Assigned To:	Dawn Colonese
IT Business Service:	Personal Productivity	Watch List:	
Incident Type:	Service Interruption	Knowledge:	
IT Provider Service:	Personal Computing	Time Worked:	00:37:33 / 00:37:33
IT Component Category L1:	Hardware		
IT Component Category L2:	-- None --		
IT Component Category L3:	-- None --		
Asset/Device:	Appliance Audio Visual Data Storage Mobile Network		
Short Description:			
Notes	Related Records	Network Printer (MFD)	
Notes		Peripheral	
Description:		Personal Computer	
		Server	

Additional Comments (Customer visible):

Work Notes:

Save & Exit Assign to me Mark as Duplicate

1

2



# Practice - Complete required field as below

← Incident | = Required field

Save & Exit   Assign to me   Mark as Duplicate

New   Assigned   In Progress   On Hold   Resolved   Closed

Incident State:	New	Opened:	2012-04-14 10:05:28
Incident:	INC0000010	Opened by:	Dawn Colonese
Client:	Michael Okrent	Impact:	3 - Low
Contact:	Michael Okrent	Urgency:	3 - Low
Notify:	Email	Priority:	5 - Low
Contact Type:	Phone	Assignment Group:	
Location:	25 SP 447B	Assign:	Group Hierarchy
IT Business Service:	Personal Productivity	Watch:	<ul style="list-style-type: none"><li>AIT Digital Humanities</li><li>AIT Learning Space Design and Engineering</li><li>AIT Social Science Research Services</li><li>CTS Academic Computing Resources</li><li>CTS Bass Media Equipment Checkout Program</li><li>CTS Classroom Technology and Event Services</li><li>CTS Computer Support Center</li><li>CTS DSP Team 1</li><li>CTS DSP Team 2</li><li>CTS DSP Team 3</li><li>CTS DSP Team FACIT</li><li><b>CTS Service Desk</b></li><li>CTS Student Technology Collaborative</li><li>ITP Beinecke Library</li><li>ITP Bio Technology Services</li><li>ITP Campus Police</li><li>ITP Center for Language Study</li><li>ITP Central Library</li><li>ITP Comparative Medicine</li><li>ITP Dermatology</li><li>ITP Diagnostic Radiology</li><li>ITP Immunobiology</li><li>ITP Investments</li><li>ITP Neurobiology</li><li>ITP OBGYN Support</li></ul>
IT Provider Service:	Personal Computing	Know:	
IT Component Category L1:	Hardware	Time:	
IT Component Category L2:	Network Printer (MFD)		
IT Component Category L3:	-- None --		
Asset/Device:			
Short Description:			

1

2

ITS INFORMATION TECHNOLOGY SERVICES

# Practice - Complete Fields as appropriate— Short Description, Description, Add'l Comments, Work Notes

Incident | = Required field

Save & Exit Assign to me Mark as Duplicate

New Assigned In Progress On Hold Resolved Closed

Incident State: New

Incident: INC0000008

Client: Michael Okrent

Contact: Michael Okrent

Notify: Email

Contact Type: Phone

Location: 25 SP 447B

IT Business Service: Personal Productivity

Incident Type: Service Interruption

IT Provider Service: Personal Computing

IT Component Category L1: Hardware

IT Component Category L2: Network Printer (MFD)

IT Component Category L3: -- None --

Asset/Device:

Short Description: **1** Printer Intermittent

Opened: 2012-04-14 08:25:36

Opened by: Dawn Colonese

Impact: 3 - Low

Urgency: 3 - Low

Priority: 5 - Low

Assignment Group: CTS Service Desk

Assigned To:

Watch List:

Knowledge:

Time Worked: 00:37:49 / 00 : 37 : 49

Notes Related Records Resolve Information QA Security

Notes

Description: **2** Printer 431b is printing intermittently

Additional Comments (Customer visible): **3** Workaround - use printer 431a (which is at the other end of the aisle) until regular printer issue is determined

Work Notes: **4** Was able to print 2 out of 5 documents sent to printer. was able to duplicate issue.

Save & Exit Assign to me Mark as Duplicate

**5 - Right-Click on the blue bar, and click "Save & Stay"**

- Create Change
- Create Problem
- Create Request
- Save & Stay
- Templates
- Export
- Assign Label
- Copy URL
- Reload form

# Practice - NOTE – Add'l Comments and Work Notes moved to Activity area

Short Description: Printer Intermittent

Notes | Related Records | Resolve Information | QA | Security

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 Notes

Assigned To: Dawn Colonese

Workaround - use printer 431a (which is at the other end of the aisle) until regular printer issue is determined

Impact: 3 - Low

Incident State: Assigned

Opened by: Kevin Brigham

Priority: 5 - Low

Was able to print 2 out of 5 documents sent to printer. was able to duplicate issue.

Assign to me | Mark as Duplicate | Save & Exit | Delete

Affected CIs | Child Incidents | Task SLAs (2) | Time Worked (1) | Metrics

Affected CIs Edit... Go to Configuration

Task = INC0000008

Configuration Item



# Practice Resolve Incident

Incident | Required field | Assign to me | Mark as Duplicate | Save & Exit | Delete

New | **Assigned** | In Progress | On Hold | Resolved | Closed

Incident State: In Progress **1**

Incident: New  
Assigned  
In Progress  
On Hold  
**Resolved** **2**  
Closed

Client: In Progress

Contact: On Hold  
**Resolved** **2**  
Closed

Notify: Email

Contact Type: Phone

Location: 25 SP 447B

IT Business Service: Personal Productivity

Incident Type: Service Interruption

IT Provider Service: Personal Computing

IT Component Category L1: Hardware

IT Component Category L2: Network Printer (MFD)

IT Component Category L3: -- None --

Asset/Device:

Short Description: Printer Intermittent

Opened: 2012-04-14 08:25:36

Opened by: Dawn Colonese

Impact: 3 - Low

Urgency: 3 - Low

Priority: 5 - Low

Assignment Group: CTS Service Desk

Assigned To: Dawn Colonese

Watch List:

Knowledge:

Time Worked: 00:44:02 / 00:05:12

Notes | Related Records | Resolve Information | QA | Security

**Notes** **3**

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

**Incident** | = Required field | Assign to me | Mark as Duplicate | Save & Exit | Delete

IT Provider Service: Personal Computing | Time Worked: 00:47:36 / 00:08:46

IT Component Category L1: Hardware

IT Component Category L2: Network Printer (MFD)

IT Component Category L3: -- None --

Asset/Device:

Short Description: Printer Intermittent

Notes | Related Records | **Resolve Information** | QA | Security

**Resolve Information**

Resolved by: | Resolve code: Workaround Provided – Uncon

Resolved: |

Resolve Time: |

Resolve Notes: ABC

Provided workaround to Mike. Confirmed he was able to print all documents successfully on printer 431

Workaround Provided – Confirmed

Workaround Provided – Unconfirmed

Duplicate Incident

Invalid Incident

Assign to me | Mark as Duplicate | **Save & Exit** | Delete

Affected CIs | Child Incidents | Task SLAs (2) | Time Worked (1) | Metrics

Affected CIs | Edit... | Go to Configuration |

Task = INC0000008

Configuration Item



Type filter text A A ↺ ☐

- Self-Service
- Service Desk
- Incident**
- Create New
- Assigned to me
- Assigned to My Group
- Open
- Open - Unassigned
- Resolved** 1
- Closed
- All
- Overview
- Critical Incidents Map

Incidents New Go to Incident  1 to 3 of 3

▸ All > Incident State = Resolved

Incident	Net ID	Short Description	Category	IT Component Category L1	Priority	Incident State	Assignment Group
<input type="checkbox"/> <a href="#">INC0000003</a>	tpl2	Broken Jack		Network	3 - High	Resolved	<a href="#">INF Network Engineering</a>
<input type="checkbox"/> <a href="#">INC0000005</a>	sk596	"no data" in the Software Library		Application Software	4 - Medium	Resolved	<a href="#">CTS Service Desk</a>
<input type="checkbox"/> <a href="#">INC0000008</a>	mo4	Printer Intermittent		Hardware	5 - Low	Resolved	<a href="#">CTS Service Desk</a>

Actions on select 1 to 3 of 3

# Practice - Back in Ticket

Incident | = Required field | Assign to me | Mark as Duplicate | Save & Exit

New > Assigned > In Progress > On Hold > **Resolved** > Closed

Incident State:	Resolved	Opened:	2012-04-14 08:25:36
Incident:	INC0000008	Opened by:	Kevin Brigham
Client:	Michael Okrent	Impact:	3 - Low
Contact:	Michael Okrent	Urgency:	3 - Low
Notify:	Email	Priority:	5 - Low
Contact Type:	Phone	Assignment Group:	CTS Service Desk
Location:	25 SP 447B	Assigned To:	Dawn Colonese
IT Business Service:	Personal Productivity	Watch List:	
Incident Type:	Service Interruption	Knowledge:	
IT Provider Service:	Personal Computing	Time Worked:	00:49:31 / 00 : 00 : 17
IT Component Category L1:	Hardware		
IT Component Category L2:	Network Printer (MFD)		
IT Component Category L3:	-- None --		
Asset/Device:			
Short Description:	Printer Intermittent		

Notes | Related Records | Resolve Information | QA

**Notes**

Description: Printer 431b is printing intermittently

Additional Comments (Customer visible):

Work Notes:

- 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=

- 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=

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## Scroll down on incident record to the Related Records Tab

Notes	<b>Related Records</b>	Resolve Information
<b>Related Records</b>		
Problem:	<input type="text"/>	
Parent Incident:	<input type="text"/>	
Change Request:	<input type="text"/>	
KB Article:	<input type="text"/>	
<b>Save &amp; Exit</b>	<b>Assign to me</b>	<b>Duplicate Incident</b> <b>Resolve Incident</b>

**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

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.

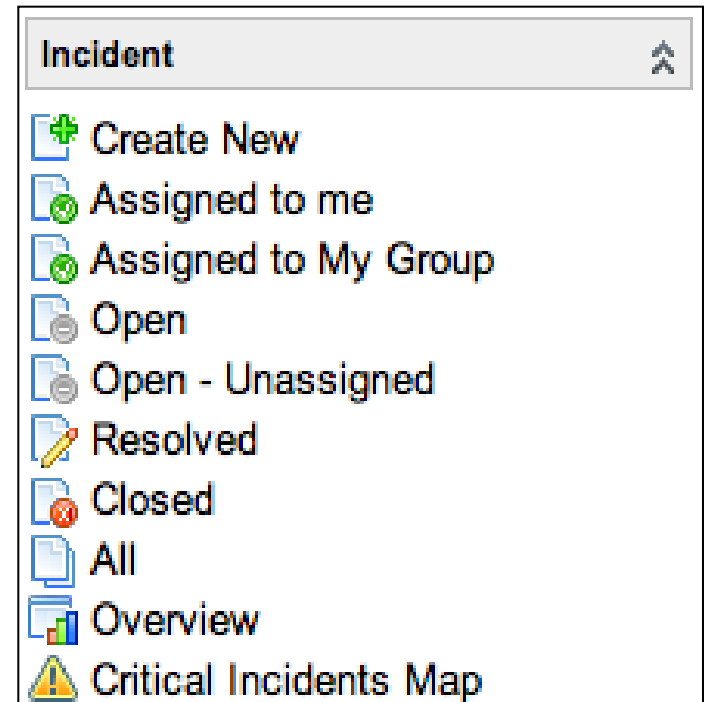
Assigned to me: A list of incidents assigned to the user

Assigned to My Group: A list of incidents assigned to the user's assignment groups

Open: A list of all open incidents

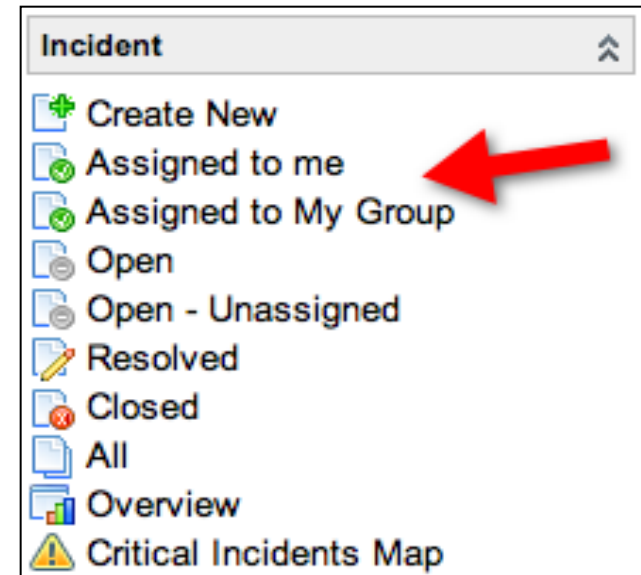
Open - Unassigned: A list of all open incidents that do not have a name in the Assigned To field

Resolved: A list of all incidents sitting in the resolved state



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.

The screenshot shows a form with the following fields: Incident State (Assigned), Incident (INC0012124), Client (Opsview User), and Contact (empty). A red arrow points to a button with a magnifying glass icon, which is the 'related incidents' button.

Incidents ▾ **New** Go to Incident ▾ |  🔍

▸ All > Client = Opsview User

	Incident	Client	Short Description	IT Component Category L1	Category	Priority
<input type="checkbox"/>	<a href="#">INC0012126</a>	<a href="#">Opsview User</a>	yale-dining-fms.its.yale.edu is DOWN	Network		1 - Major
<input type="checkbox"/>	<a href="#">INC0012125</a>	<a href="#">Opsview User</a>	HTTPS - 6784 - Esbdev is CRITICAL on host vm-bpdevmt-01.web.yale.internal	Network		1 - Major
<input type="checkbox"/>	<a href="#">INC0012124</a>	<a href="#">Opsview User</a>	Disk Windows is WARNING on host tms01.its.yale.edu	Network		2 - Critical

When resolving incidents, users will have to input additional information under the Resolve Information Tab

Notes | Related Records | **Resolve Information** | QA | Security

**Resolve Information**

Resolved by:

Resolved code: -- None --

Resolved:

Resolve Time:

Resolve Notes:

Assign to me | Mark as Duplicate | Save & Exit | Delete



- 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

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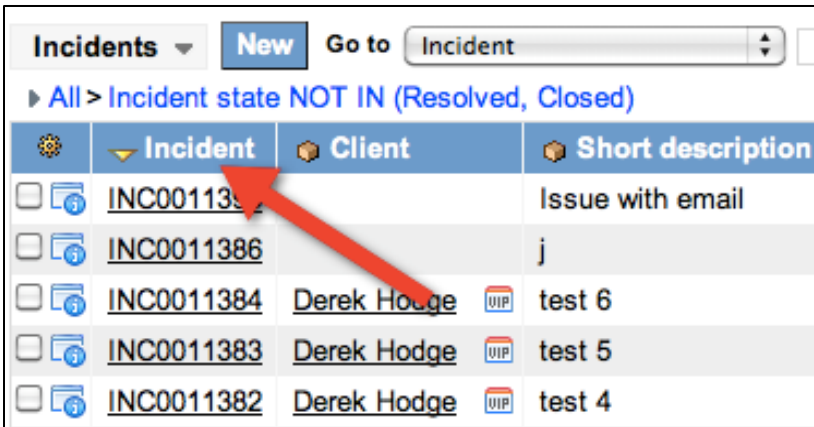
Working with Incidents

**Modifying Lists**

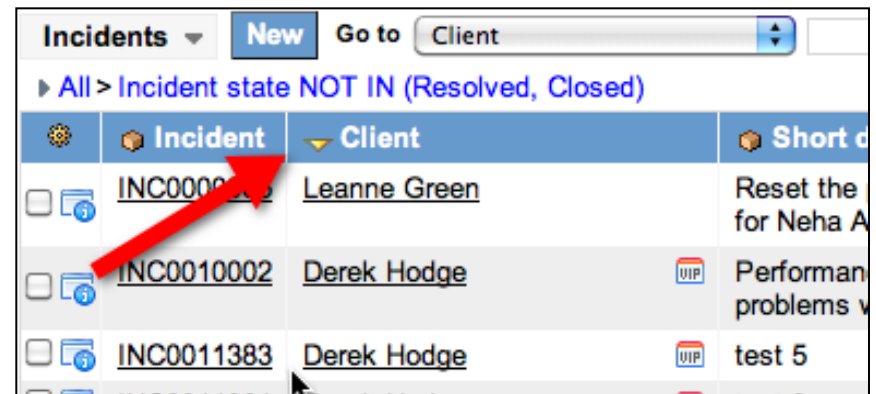
Service Requests

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.

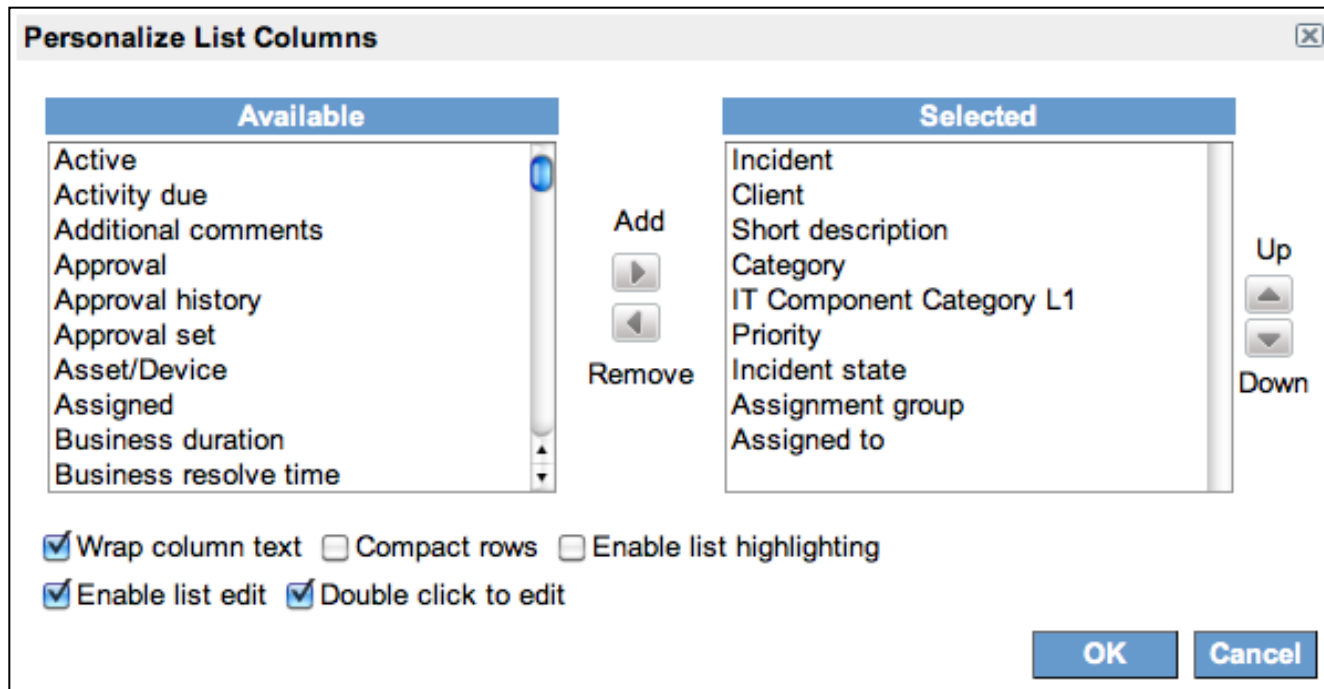
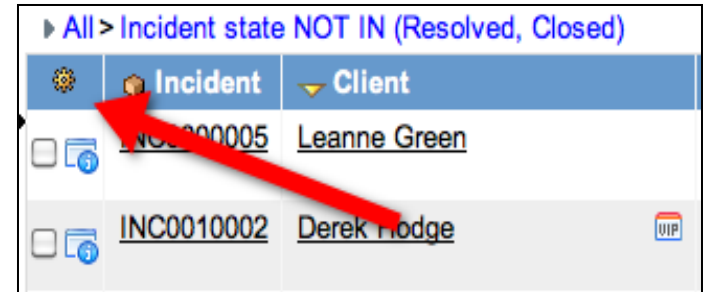


	Incident	Client	Short description
<input type="checkbox"/>	<a href="#">INC0011385</a>		Issue with email
<input type="checkbox"/>	<a href="#">INC0011386</a>		j
<input type="checkbox"/>	<a href="#">INC0011384</a>	<a href="#">Derek Hodge</a>	test 6
<input type="checkbox"/>	<a href="#">INC0011383</a>	<a href="#">Derek Hodge</a>	test 5
<input type="checkbox"/>	<a href="#">INC0011382</a>	<a href="#">Derek Hodge</a>	test 4

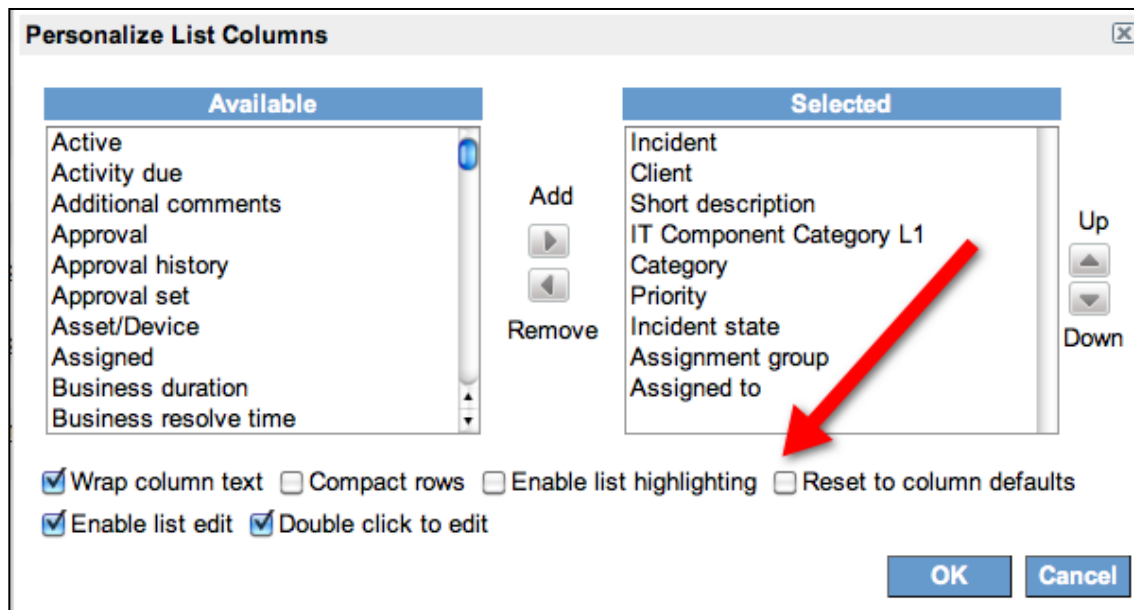


	Incident	Client	Short description
<input type="checkbox"/>	<a href="#">INC0011385</a>	<a href="#">Leanne Green</a>	Reset the for Neha A
<input type="checkbox"/>	<a href="#">INC0010002</a>	<a href="#">Derek Hodge</a>	Performan problems v
<input type="checkbox"/>	<a href="#">INC0011383</a>	<a href="#">Derek Hodge</a>	test 5


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

The image displays two sequential screenshots of the 'Personalize List Columns' dialog box. In the first screenshot, the 'Available' list contains items such as 'Expected start', 'FPOC', 'Follow up', 'Group list', 'IT Business Service', 'IT Component Category L2', 'IT Component Category L3', 'IT Provider Service', 'Impact', and 'In Progress'. 'IT Business Service' is highlighted, and a red '2' is placed to its left. The 'Selected' list contains 'Incident', 'Resolve Time', 'Client', 'Short Description', 'Category', 'IT Component Category L1', 'Priority', 'Incident State', 'Assignment Group', and 'Assigned To'. In the second screenshot, 'IT Business Service' has been moved to the 'Selected' list, and a red '3' is placed to its right. The 'Available' list now includes 'Expected start', 'FPOC', 'Follow up', 'Group list', 'IT Component Category L2', 'IT Component Category L3', 'IT Provider Service', 'Impact', 'In Progress', and 'Incident State Count'. Both screenshots include checkboxes for 'Wrap column text', 'Compact rows', 'Enable list highlighting', 'Reset to column defaults', 'Enable list edit', and 'Double click to edit', along with 'OK' and 'Cancel' buttons.

- 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



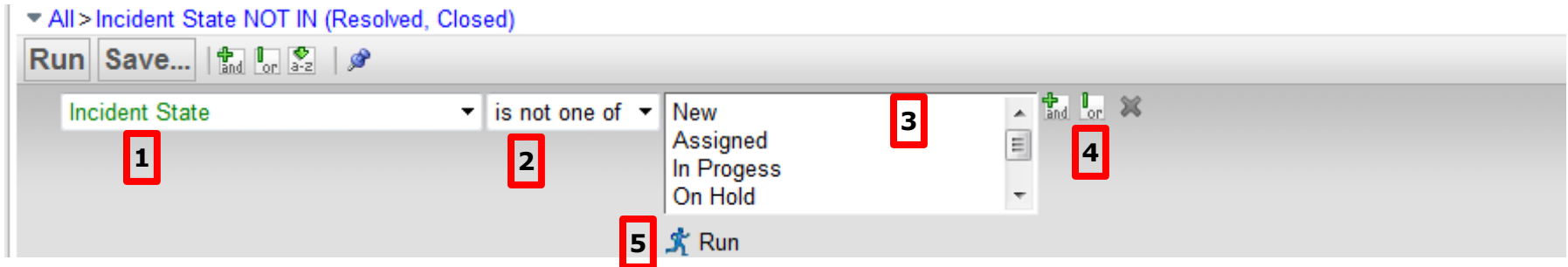
Users can run filters on ANY list. To do this:

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)
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



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

- 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

**Self-Service**

- Homepage
- Service Catalog
- Knowledge
- Help the Help Desk

---

- Create New Incident
- My Open Incidents
- Watched Incidents

---

- My Profile
- Delegates**
- Take Survey

1

Delegates **New** Go to Starts

2

Starts	Ends	User	Delegate	Approvals	Assignments	CC notifications	Meeting invitations
--------	------	------	----------	-----------	-------------	------------------	---------------------

← Delegate | = Required field Save & Exit

User:	Michael Okrent	Approvals:	<input checked="" type="checkbox"/>
Delegate:	Mary-Kay Kaminski	Assignments:	<input checked="" type="checkbox"/>
Starts:	2012-04-03 10:17:45	CC notifications:	<input checked="" type="checkbox"/>
Ends:	2020-04-06 18:59:59	Meeting invitations:	<input checked="" type="checkbox"/>

Save & Exit

3

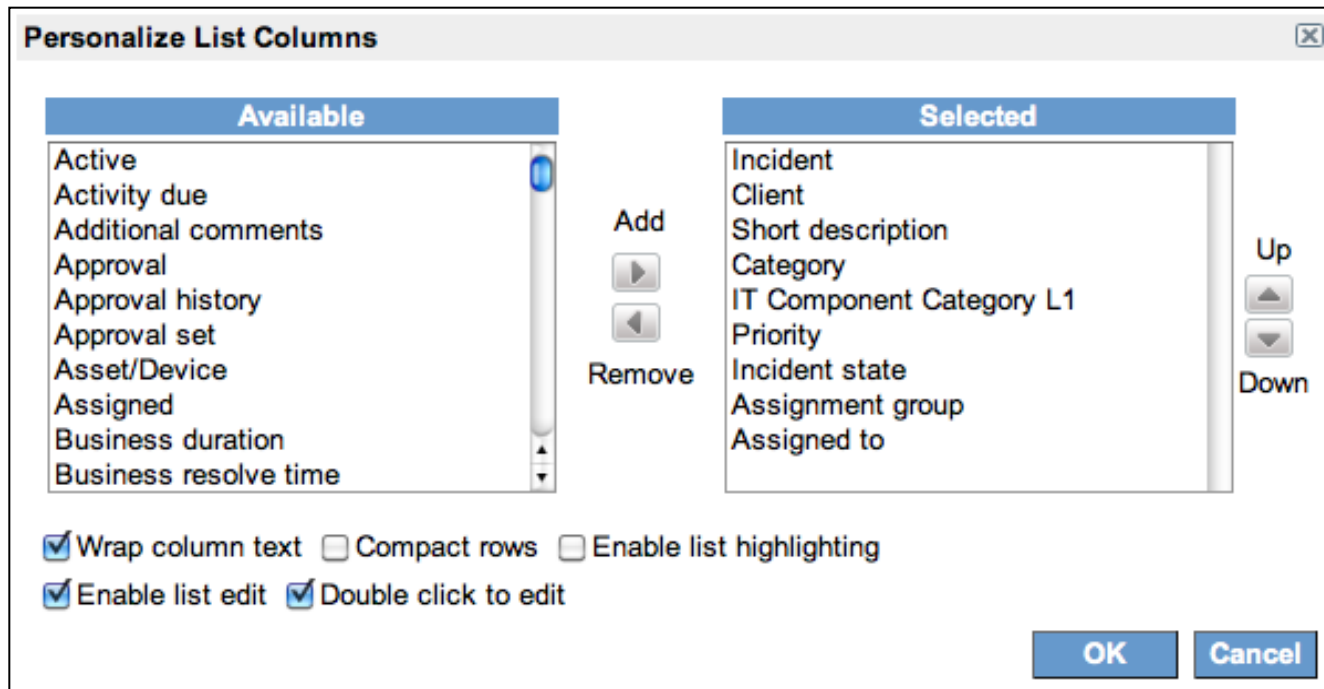
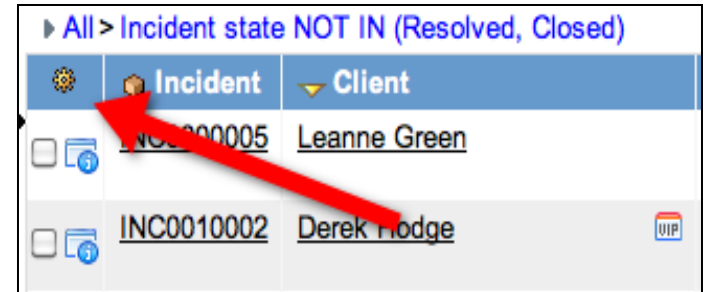
Delegates **New** Go to Starts

4

Starts	Ends	User	Delegate	Approvals	Assignments	CC notifications	Meeting invitations
<a href="#">2012-04-03 10:17:45</a>	2020-04-06 18:59:59	<a href="#">Michael Okrent</a>	<a href="#">Mary-Kay Kaminski</a>	true	true	true	true

Actions on selected rows...

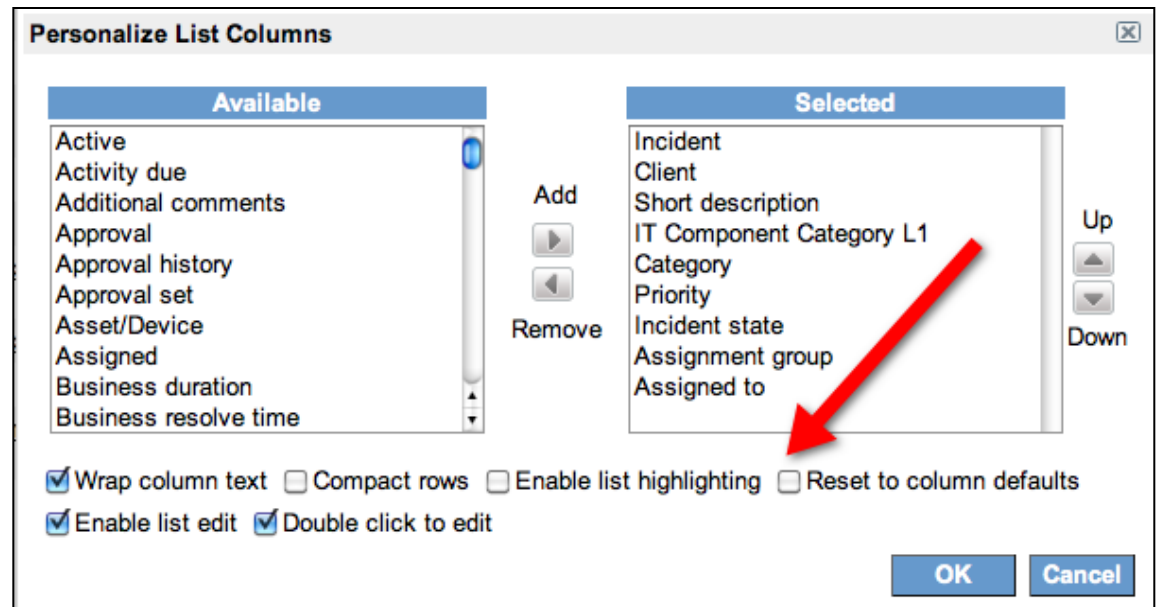
All lists, in the upper left corner, have a gear button. Pressing this brings about the personalized list options screen:



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

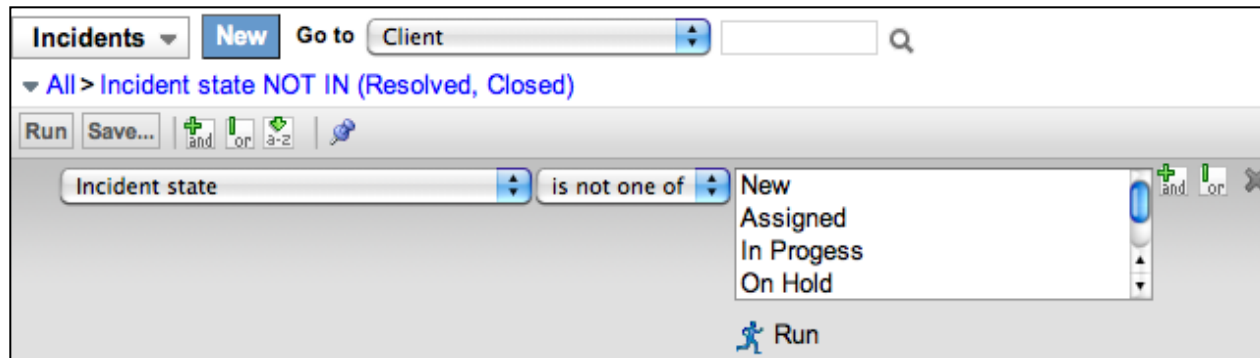
1. Find the field you want to add from the "Available" column on the left
2. Select it, and then click the "Add" button in the middle
3. The field will automatically be added to the bottom of the selected, meaning it will be the last column on your list. Select it and hit the up or down buttons to rearrange 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



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)
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

## 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



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**Service Requests**

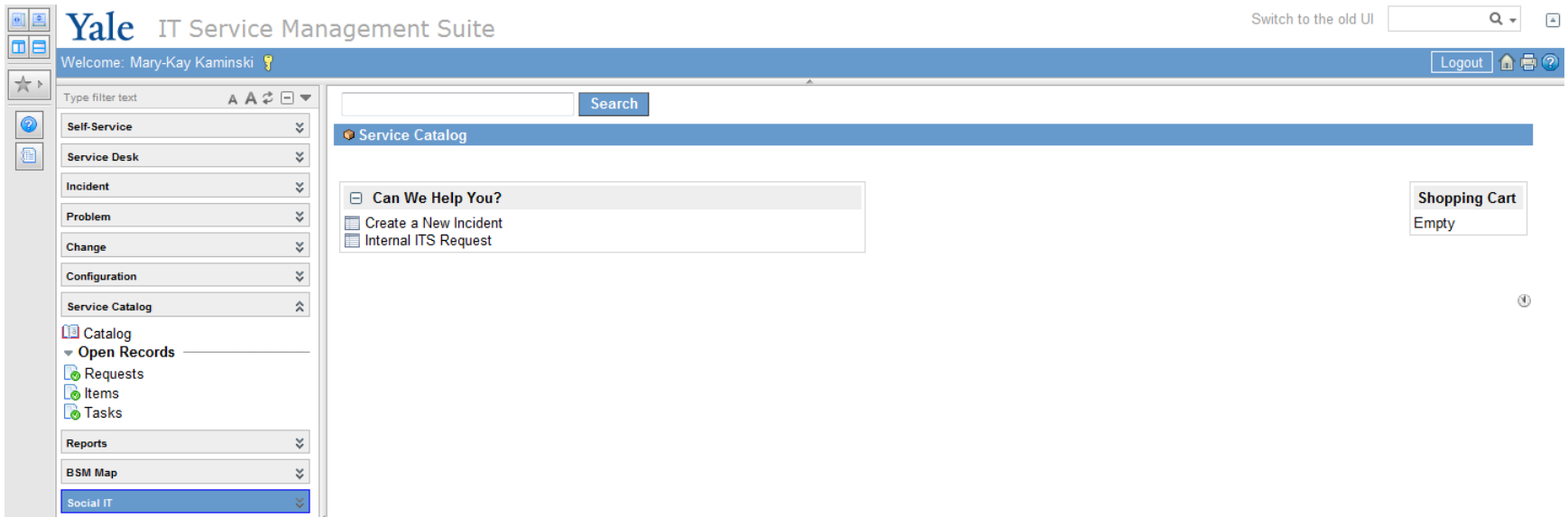
Users can create new requests, just like incidents, from the new call screen.  
To do this:

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



The screenshot shows a web form for creating a service request. At the top is a large empty text area. Below it is a section titled "Call type" with two radio button options: "Incident" and "Request". The "Request" option is selected. Below this is a section titled "Request item" with a blue link "More information" and a search input field with a magnifying glass icon. At the bottom right is a "Submit" button with a green play icon and a small circular icon with a downward arrow.

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



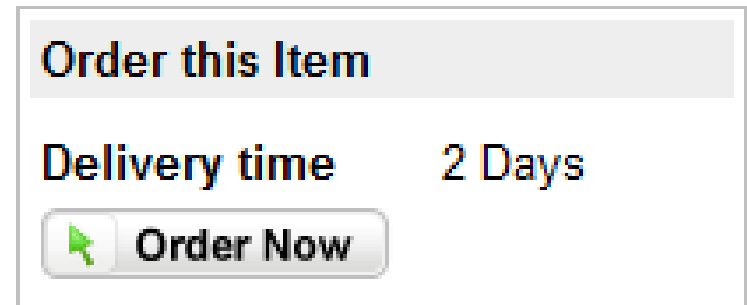
On the catalog screen, the users simply need to click the type of request they need and then fill out the required fields.

Catalog Item - Generic Request

<b>Who is the request for?</b> <input type="text" value="Ian Golando"/>	<b>When do you need this by?</b> <input type="text"/>
<b>What type of request is this?</b> -- None --	<b>Select the Request</b> -- None --
<b>Does this require an approval?</b> -- None --	<b>Select an Assignment Group</b> <input type="text"/>
<b>Short Description</b> <input type="text"/>	
<b>Description</b>	
<input type="text"/>	

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.

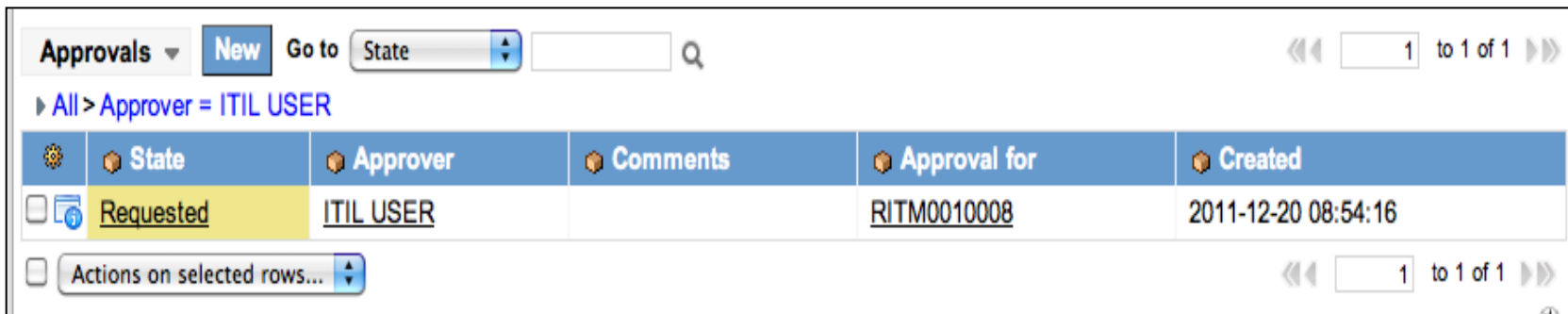


Clicking Add to Cart will add the item to their shopping cart (Think Amazon.com). Users have the ability to add multiple items to their shopping cart. Once the user finally checks out their shopping cart, all those request items will be placed into a single request. If a user needs to order multiple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

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.



The screenshot shows a web interface for 'Approvals'. At the top, there is a 'New' button and a 'Go to' dropdown menu set to 'State'. Below this is a breadcrumb trail: 'All > Approver = ITIL USER'. The main content is a table with the following columns: State, Approver, Comments, Approval for, and Created. A single row is displayed with the state 'Requested', approver 'ITIL USER', and approval ID 'RITM0010008', created on '2011-12-20 08:54:16'. The 'Requested' cell is highlighted in yellow. At the bottom, there is an 'Actions on selected rows...' dropdown menu and pagination controls showing '1 to 1 of 1'.

State	Approver	Comments	Approval for	Created
Requested	ITIL USER		RITM0010008	2011-12-20 08:54:16

Users can enter the approval:

The screenshot shows a web-based approval interface. At the top, there is a navigation bar with a back arrow and the title "Approval". To the right of the title are buttons for "Approve", "Reject", "Save & Exit", and "Delete", along with a printer icon and a refresh icon. Below the navigation bar, there are several input fields: "Approver:" with a text box containing "ITIL USER" and a search icon; "Approving:" with a text box containing "Requested Item: RITM0010008" and a search icon; and "State:" with a dropdown menu showing "Requested". Below these fields is a "Comments:" section with a small icon and a large text area containing a cursor. Underneath the comments is a section titled "Summary of Item being approved:" which contains a table with the following data:

Description	Price	Quantity	Total
▶ IBM Thinkpad X60	\$3,000.00	1	\$3,000.00

Below the table is an "Activity" section with a right-pointing arrow and a close icon. It contains two entries:

- 2012-02-28 05:15:21 **ITIL USER** - Changed: Approver  
Approver: ITIL USER
- 2011-12-20 08:54:16 **Donna Hodge** - Changed: Approver, State  
Approver: (Empty)  
State: Requested

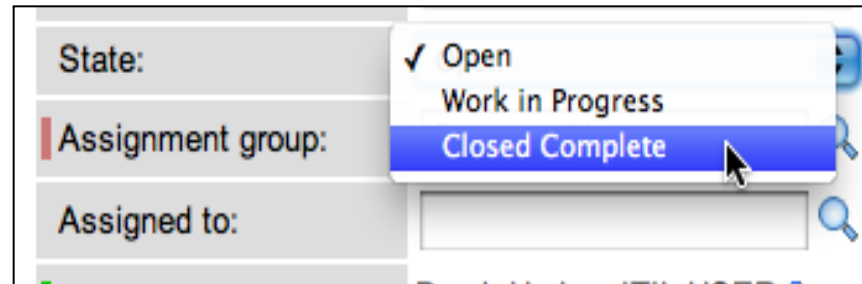
At the bottom of the form, there are buttons for "Approve", "Reject", "Save & Exit", and "Delete".

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



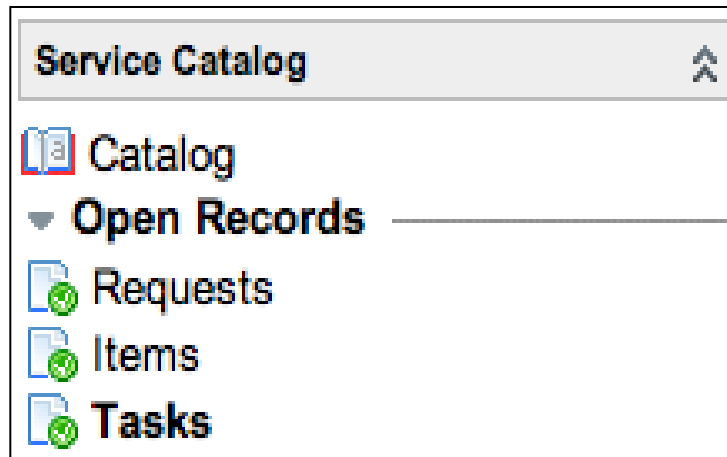


The service catalog has a few lists users may find helpful:

Requests: A list of all open requests

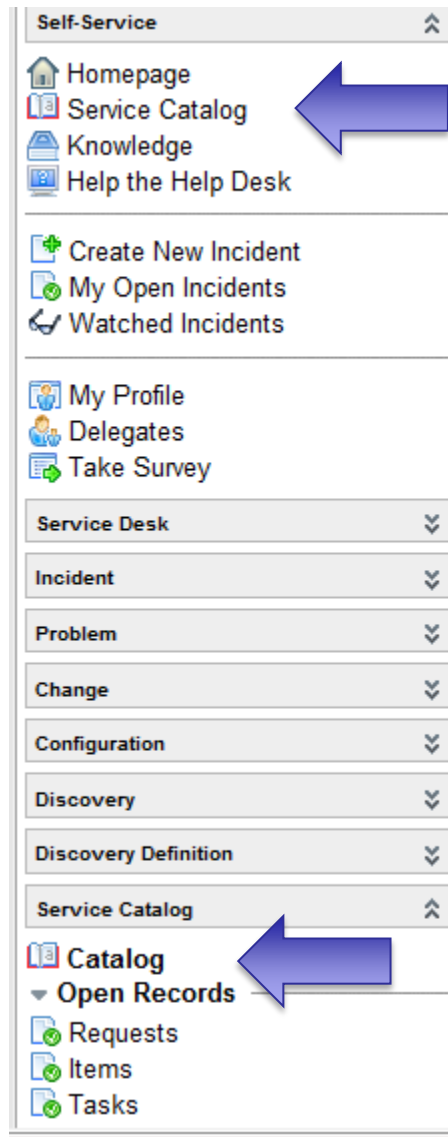
Items: A list of all open request items

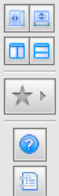
Tasks: A list of all open catalog tasks



- 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.

- Go to the navigation pane.
- Open Self-Service, then Service Catalog
- Or
- Service Catalog, then Catalog





Type filter text

- Self-Service
- Service Desk
- Incident
- Problem
- Change
- Configuration
- Service Catalog
- Catalog
- Open Records
  - Requests
  - Items
  - Tasks
- Reports
- BSM Map
- Social IT

## Service Catalog

- Can We Help You?
  - Create a New Incident
  - Internal ITS Request

Shopping Cart  
Empty



# Request Screen

Search

← Catalog Item - Internal ITS Request 🗑️

**Who is the request for?**  
 🔍 📄

**When do you need this by?**  
 📅

**Order this Item**  
Delivery time 2 Days  
[👉 Order Now](#)

**What type of request is this?**  
 ▼

**Select the Request**  
 ▼

**Does this require an approval?**  
 ▼

**Select an Assignment Group**  
 🔍 📄

**Short Description**

**Description** 📄 📄  
 ⬆️ ⬆️

# Submit Order

ServiceNow IT Service Management Suite - Windows Internet Explorer

https://yaletraining.service-now.com/navpage.do

File Edit View Favorites Tools Help

Share Browser WebEx Convert Select Google Search More 0 M

Home - Motley Fool Stoc... ServiceNow - UAFS Servic... SNCWiki ITS050A - ServiceNow Pha... PMI Monthly DEP HP Quality Center 10 ServiceNow Training Insta... ServiceNow Demo

YaleInfo: The Yal... Home - ITS050A ... iGoogle Log on to the Bla... Okrent, Michael -... Response Team -... ServiceNow I... x

Page Safety Tools ? ? ? ? ?

## Yale IT Service Management Suite

Welcome: Michael Okrent Update Set: Default Logout

### Shopping Cart

Item	Delivery Time	Price (ea.)	Quantity	Total
Internal ITS Request -	2 Days	\$0.00	1	\$0.00
<b>Total:</b>				<b>\$0.00</b>

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

ServiceNow IT Service Management Suite - Windows Internet Explorer

https://yaletraining.service-now.com/navpage.do

File Edit View Favorites Tools Help

Share Browser WebEx Convert Select Google Search More

Home - Motley Fool Stoc... ServiceNow - UAFS Servic... SNCWiki ITS050A - ServiceNow Pha... PMI Monthly DEP HP Quality Center 10 ServiceNow Training Insta... ServiceNow Demo

YaleInfo: The Yal... Home - ITS050A ... iGoogle Log on to the Bla... Okrent, Michael -... Response Team -... ServiceNow I...

Yale IT Service Management Suite

Welcome: Michael Okrent

Update Set: Default Logout

Type filter text

Self-Service

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

Service Desk

Incident

Problem

Change

Configuration

Discovery

Discovery Definition

Service Catalog

Catalog

Open Records

- Requests
- Items
- Tasks

### Order Status

#### Summary

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.

Number	Description	Delivery Date	Stage	Price (ea.)	Qty	Total
<a href="#">RITM0010046</a>	Internal ITS Request	2012-04-07	<input checked="" type="checkbox"/> Approved <input checked="" type="checkbox"/> Manager - 2 Days (Completed) <input checked="" type="checkbox"/> Fulfillment - 1 Day (In progress) <input type="checkbox"/> Completed	\$0.00	1	\$0.00
<b>Total:</b>						<b>\$0.00</b>

#### Delivery Information

Estimated Delivery Date of Complete Order: **2012-04-07**

[Catalog](#) [Cancel](#) [Home](#)

#### Copy this Request for:

- 
- 
- 
- 
- 
- 
- 
- 
- 
- 

Done

Internet | Protected Mode: On

11:01 AM 4/4/2012

# Optional: Review Request – Click Request Number

The screenshot shows the ServiceNow IT Service Management Suite interface. The browser address bar displays <https://yaletraining.service-now.com/navpage.do>. The page title is "Yale IT Service Management Suite" and the user is logged in as Michael Okrent. The left sidebar contains a navigation menu with categories like Self-Service, Service Desk, Incident, Problem, Change, Configuration, Discovery, Service Catalog, Knowledge Base, Asset Portfolio, Asset Contracts, Reports, BSM Map, and Content Management. The main content area shows a "Requests" list with columns for Number, Requested for, Opened by, Request state, and Due date. The "Request state" column is highlighted in green for all entries. The list shows 42 requests in total, with the first 19 visible in the screenshot.

Number	Requested for	Opened by	Request state	Due date
REQ0010045	Michael Okrent	Michael Okrent	Approved	2012-04-07 16:00:00
REQ0010044	Michael Okrent	Michael Okrent	Approved	2012-04-06 16:00:00
REQ0010043	Karen Polhemus	Michael Okrent	Approved	2012-04-06 16:00:00
REQ0010042	Michael Okrent	Michael Okrent	Approved	2012-04-05 16:00:00
REQ0010041	Michael Okrent	Michael Okrent	Approved	2012-04-01 16:00:00
REQ0010040	Janice Murphy-Wallace	Janice Murphy-Wallace	Approved	2012-04-01 16:00:00
REQ0010037	Ian Golando	Ian Golando	Approved	2012-03-09 16:00:00
REQ0010036	ITIL USER	ITIL USER	Approved	2012-02-28 04:52:45
REQ0010033			Approved	2012-02-20 16:00:00
REQ0010032			Approved	2012-02-19 16:00:00
REQ0010031			Approved	2012-02-18 16:00:00
REQ0010029			Approved	2012-02-13 16:00:00
REQ0010027			Approved	2012-02-08 11:20:46
REQ0010026			Approved	2012-02-08 11:08:23
REQ0010025			Approved	2012-02-08 11:04:42
REQ0010024			Approved	2012-02-08 10:57:12
REQ0010023			Approved	2012-02-08 10:51:53
REQ0010022			Approved	2012-02-08 10:45:26
REQ0010021			Approved	2012-02-08 10:43:15
REQ0010020			Approved	2012-02-07 14:19:40
REQ0010019			Approved	2012-02-06 11:50:59



# Displays Details of Request

The screenshot displays the ServiceNow IT Service Management Suite interface within a Windows Internet Explorer browser. The browser address bar shows the URL <https://yaletraining.service-now.com/navpage.do>. The page title is "Yale IT Service Management Suite" and the user is logged in as Michael Okrent. The interface is divided into several sections:

- Left Navigation Panel:** Contains a "Type filter text" input and a list of menu items including Self-Service, Service Desk, Incident, Problem, Change, Configuration, Discovery, Discovery Definition, Service Catalog, Catalog, Open Records, Requests, Items, Tasks, Catalog Definition, Catalog Policy, Catalog Variables, Knowledge Base, Asset Portfolio, Asset Contracts, Reports, BSM Map, and Content Management.
- Request Details Form:** Located at the top, it contains fields for:
  - Number: REQ0010045
  - Requested for: Michael Okrent
  - Location: (empty)
  - Due date: 2012-04-07 16:00:00
  - Price: 0
  - Opened: 2012-04-04 11:00:32
  - Opened by: Michael Okrent
  - Approval: Approved
  - Request state: Approved
  - Contact Type: -- None --
- Buttons:** Below the form are buttons for "Add New Item", "Cancel", "Copy", "Save & Exit", and "Delete".
- Related Links:** Includes "Show Workflow" and "Workflow Context".
- Requested Items Table:** A table with columns: Number, Quantity, Item, Due date, Price, Assigned To, and Stage. It contains one row:

Number	Quantity	Item	Due date	Price	Assigned To	Stage
RITM0010046	1	Internal ITS Request	2012-04-07 16:00:00	\$0.00		<ul style="list-style-type: none"><li>Approved</li><li>Manager - 2 Days (Completed)</li><li>Fulfillment - 1 Day (In progress)</li><li>Completed</li></ul>

The bottom of the browser window shows the Windows taskbar with various application icons and the system clock displaying 11:05 AM on 4/4/2012.

# I'm am member of YSS Client Accounts

Yale

The screenshot shows the ServiceNow IT Service Management Suite interface. The browser address bar displays <https://yaletraining.service-now.com/navpage.do>. The page title is "Yale IT Service Management Suite". The user is logged in as "Stacey Smart". The left navigation pane shows various categories like "Self-Service", "Service Desk", "New Call", "Callers", "Incidents", "Knowledge", "My Work", "My Groups Work", "My Approvals", "SLA's", "My Work", "My Groups Work", "Incident", "Problem", "Change", "Configuration", "Service Catalog", "Reports", "BSM Map", and "Social IT". The main content area displays a list of tasks with the following columns: Number, Priority, State, Assigned To, Escalation, Short Description, and Task type. A single task is visible with the following details:

Number	Priority	State	Assigned To	Escalation	Short Description	Task type
SCTASK0010059	5 - Low	Open		Normal	Unable to log on to my Windows 7 Laptop	Catalog Task

A red box highlights the text: "Assume Client Accounts reset the password. Now they go to Service Now to record it in the ticket."

# I clicked on the task

The screenshot shows the ServiceNow IT Service Management Suite interface in a Windows Internet Explorer browser. The browser address bar shows the URL <https://yaletraining.service-now.com/navpage.do>. The page title is "Yale IT Service Management Suite".

The interface is divided into several sections:

- Left Navigation Panel:** Contains a "Type filter text" input and a list of navigation items including "Self-Service", "Service Desk", "New Call", "Callers", "Incidents", "Knowledge", "My Work", "My Groups Work", "My Approvals", "SLA's", "My Work", "My Groups Work", "Incident", "Problem", "Change", "Configuration", "Service Catalog", "Reports", "BSM Map", and "Social IT".
- Header:** Displays "Welcome: Stacey Smart" and a "Logout" button.
- Task Details (Catalog Task):**
  - Number:** SCTASK0010059
  - Request item:** RITM0010046
  - Configuration Item:** MW-C5P81J1.yu.yale.edu
  - Due date:** 2012-04-05 11:00:33
  - Approval:** Not Yet Requested
  - State:** Closed Complete
  - Assignment Group:** YSS Client Accounts
  - Assigned To:** Stacey Smart
  - Work notes list:** (empty)
  - Time Worked:** 00:09:00 / 00:09:00
- Variables:**
  - When do you need this by?:** 2012-04-04
  - What type of request is this?:** Password - Reset
  - Select the Request:** Request to unlock account
  - Does this require an approval?:** No
- Description:** Short Description: Reset my password
- Work Notes:** Used procedure 1 to reset password
- Additional Comments:** (empty)
- Activity:** 2012-04-04 11:00:33 Michael Okrent - Changed: Impact, Opened by, Priority

# Scrolled to bottom of screen

ServiceNow IT Service Management Suite - Windows Internet Explorer

https://yaletraining.service-now.com/navpage.do

File Edit View Favorites Tools Help

Yale IT Service Management Suite

Welcome: Stacey Smart

Logout

Save & Exit

**Catalog Task**

Select the Request: Request to unlock account

Does this require an approval? No

Short Description: Reset my password

Description:

Work Notes:

Additional Comments:

Activity >>

- 2012-04-04 11:21:46 Stacey Smart - Changed: Assigned To, Configuration Item, Work Notes
- 2012-04-04 11:00:33 Michael Okrent - Changed: Impact, Opened by, Priority

Save & Exit

Affected CIs (1) | Approvers | Group approvals | Time Worked (1)

Affected CIs Go to Applied

Task = SCTASK0010059

Applied	Applied date	Configuration Item	XML
<input type="checkbox"/> false		MW-C5P81J1.yu.yale.edu	

Actions on selected rows...

Internet | Protected Mode: On

11:22 AM 4/4/2012

# Completed the Task – Save and Exit

The screenshot displays the ServiceNow IT Service Management Suite interface in a Windows Internet Explorer browser window. The browser address bar shows the URL <https://yaletraining.service-now.com/navpage.do>. The page title is "Yale IT Service Management Suite" and the user is logged in as "Stacey Smart".

The interface is divided into several sections:

- Left Navigation Panel:** Contains a search bar and a list of menu items including Self-Service, Service Desk, New Call, Callers, Incidents, Knowledge, My Work, My Groups Work, My Approvals, SLA's, Incident, Problem, Change, Configuration, Service Catalog, Reports, BSM Map, and Social IT.
- Header:** Includes the Yale logo, the text "IT Service Management Suite", a "Welcome: Stacey Smart" message, and a "Logout" button.
- Main Content Area:**
  - Catalog Task:** A blue header bar with a "Save & Exit" button.
  - Work Notes:** A section for adding work notes.
  - Additional Comments:** A section for adding additional comments.
  - Activity:** A list of activity items:
    - 2012-04-04 11:21:46 Stacey Smart** - Changed: Assigned To, Configuration Item, Work Notes
      - Assigned To: Stacey Smart
      - Configuration Item: MW-C5P81J1.yu.yale.edu
      - Used procedure 1 to reset password
    - 2012-04-04 11:00:33 Michael Okrent** - Changed: Impact, Opened by, Priority
      - Impact: 3 - Low
      - Opened by: Michael Okrent
      - Priority: 5 - Low
  - Save & Exit:** A blue button below the activity list.
  - Affected Cls (1) | Approvers | Group approvals | Time Worked (1):** A summary bar.
  - Time Worked:** A section with a "New" button and a search field. Below it, a table shows the time worked for the task.


Comments	Time in seconds	Time worked	Type	User
(empty)	590	9 Minutes		Stacey Smart

The bottom of the browser window shows the Windows taskbar with various application icons and the system tray displaying the date and time as 11:24 AM on 4/4/2012.

# Request Item Workflow Tracking

Service Catalog

- Catalog
- Open Records
  - Requests
  - Items
  - Tasks



Yale IT Service Management Suite

Welcome: Mary-Kay Kaminski

Logout

Switch to the old UI

Type filter text

Self-Service

Service Desk

Incident

Problem

Change

Configuration

Service Catalog

Catalog

Open Records

- Requests
- Items
- Tasks

Reports

BSM Map

Social IT

Requested Items

Go to: Number

All > Active = true

Number	Item	Stage	Request	Requested for	Opened by	Due date	Quantity
RITM0000005	Internal ITS Request	Approved Manager - 2 Days (Completed) Fulfillment - 1 Day (In progress) Completed	REQ0000005	Michael Okrent	Michael Okrent	2012-04-16 16:00:00	1
RITM0000006	Internal ITS Request		REQ0000006	Michael Okrent	Michael Okrent	2012-04-16 16:00:00	1
RITM0000007	Internal ITS Request		REQ0000007	Michael Okrent	Michael Okrent	2012-04-16 16:00:00	1
RITM0000008	Internal ITS Request		REQ0000008	Michael Okrent	Michael Okrent	2012-04-16 16:00:00	1
RITM0000009	Internal ITS Request		REQ0000009	Mary-Kay Kaminski	Mary-Kay Kaminski	2012-04-16 16:00:00	1
RITM0000010	Internal ITS Request		REQ0000010	Mary-Kay Kaminski	Mary-Kay Kaminski	2012-04-16 16:00:00	1

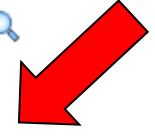
Actions on selected rows...

# Tracking Time in Requests

**Catalog Task** [Close Task] [Save & Exit] [Delete]

Number:	TASK0010003	Approval:	Not Yet Requested
Request item:	RITM0010002	State:	Pending
Configuration Item:		Assignment Group:	
Due date:	2011-11-18 10:50:18	Assigned To:	
Short Description: Assess or Scope Task		Work notes list:	
Description: ABC		Time Worked:	00:00:22 / 00:00:22

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

[Close Task] [Save & Exit] [Delete]

Affected Cls | Approvers | Group approvals | **Time Worked (1)**

Time Worked [New] Go to Comments [ ] [ ]

Task = TASK0010003

Comments	Time in seconds	Time worked	Type	User
(empty)	194	3 Minutes		Michael Okrent

Actions on selected rows... [ ] [ ]



Scroll Down

# Working with Incidents - Additional Concepts Yale

- 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



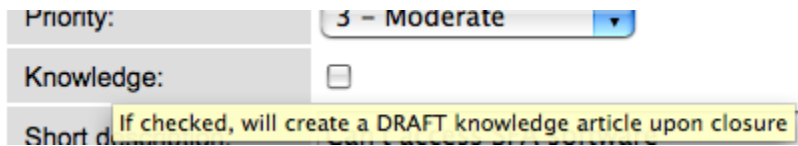
- Create an incident record
- Select “resolved” in incident state drop-down
- Validate with the user that the incident is resolved (verbal) and change the incident state to resolved
- Enter resolution information
- Right click and select “save and stay”
- Validate time worked on incident. If incorrect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

- 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”

- 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"

- 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.

- 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



The screenshot shows a portion of a web form. It includes a 'Priority' dropdown menu set to '3 - Moderate', a 'Knowledge' checkbox which is checked, and a 'Short d' label. A yellow tooltip is visible over the 'Knowledge' checkbox, containing the text: 'If checked, will create a DRAFT knowledge article upon closure'.

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