



IT SERVICE MANAGEMENT TRAINING

Wright State University – Computing &
Telecommunications Services

Table of Contents

IT Service Management (ITSM)	3
ITIL	3
Benefits of ITIL	3
ITIL Lifecycles	3
Processes	4
Incident Management	4
Request Fulfillment.....	4
CaTS Incident Management	5
CaTS Request Fulfillment	5
ServiceNow	6
Introduction	6
Logging In	6
General Navigation	7
Banner Frame	7
Application Navigator	8
Content Frame	10
Calls	13
Incident	13
Create New	14
Working Existing Incidents	19
Incident Notes and Additional Comments.....	21
Notes tab.....	21
Related Records	25
Resolving an Incident.....	26
Requests/Service Catalog	29
Requests, Requested Items, and Tasks.....	29
Accessing the Service Catalog.....	30
Creating a Request	31
Approvals.....	37
Filtering and Customizing List Views	38
Saving Filters.....	40
Viewing Saved Filters	40
Customized Field Listing	41
Creating and Viewing Reports	42
Viewing	42
Creating a New Report	44
Preparing to Go-Live	45
Appendix	47
Appendix A – Service Level Targets: Response and Resolution	47

IT Service Management (ITSM)

ITSM is defined as “the implementation and management of quality IT services that meet the needs of the business”.¹ ITSM is the overall set of governance, policies, processes and procedures that support the lifecycle of all IT services – from initial strategy and planning, to implementation, operation, improvement and finally retirement.

ITIL

ITIL, formerly an acronym of Information Technology Infrastructure Library, is an ITSM framework used to provide guidance and best practice for IT organizations. According to Axelos, the licensor of ITIL, ITIL is the “most widely accepted approach to IT service management worldwide”.² ITIL is used in a variety of industries and organizations of all sizes. The ITIL framework was initially published in the late-1980s and has since gone through four updates, the last of which was published in 2011, known as ITIL 2011 Edition.

Benefits of ITIL

According to Axelos, ITIL is successful and beneficial to all organizations for 3 primary reasons³:

Vendor-neutral: ITIL best practices can be applied to any organization within any industry, and does not require a particular technology platform. ITIL is owned by the UK government, so no commercial entity holds proprietary intellectual property on the best practices within ITIL.

Non-prescriptive: ITIL does not provide a step-by-step process to manage IT services and processes. There is no “right way”. Rather, ITIL provides guidance on how to go about developing processes, and leaves it to the individual organization to adopt and adapt ITIL to fit the needs of the organization.

Best practice: ITIL represents the combined knowledge and experiences of global organizations and IT leaders over the course of decades and has been updated to reflect changing business trends and technological advancements.

ITIL Lifecycles

ITIL includes 5 lifecycles that provide guidance on different aspects of the service lifecycle. They include:

Service Strategy: focuses on understanding the needs of the business, managing the demand and financial aspects of services needed by the business.

¹ Axelos. *ITIL® Service Operation* (Crown Copyright 2011), 15

² Axelos website, <https://www.axelos.com/>

³ Axelos. *ITIL® Service Operation* (Crown Copyright, 2011), 9

Service Design: focuses on the actual design of IT services as needed by the business. This includes coordinating with the business to ensure the design meets the business needs, determining the necessary availability of services (e.g., 24/7, 8-5 M-F, etc), expected amount of time to respond to and resolve outages, and ensuring the designed service has the capacity to handle the expected use and availability requirements.

Service Transition: focuses on transitioning a service from design into production. This includes testing and validation, change management and developing appropriate amounts of knowledge documentation to provide to staff responsible for supporting services in production.

Service Operation: focuses on the actual operation of production services. This includes the service desk being the first point of contact for managing the lifecycle of incidents and requests, as well as managing higher levels of technical support required to support services, including operational functions of a data center.

Continual Service Improvement (CSI): focuses on ensuring that services continue to operate in accordance to the needs of the business, including responding to changing needs of the business. As the needs of the business change, it is first identified in CSI at which point the cycle restarts with Service Strategy.

Processes

Within the 5 ITIL lifecycles, a total of 26 ITIL processes exist. At the current time, CaTS is focusing on two processes: Incident Management and Request Fulfillment.

Incident Management

An incident is “an unplanned interruption to an IT service or reduction in the quality of an IT service or a failure of an [IT component] that has not yet impacted an IT services (for example failure of one disk from a mirror set)”⁴. Incident Management is “the process responsible for managing the lifecycle of all incidents”⁵.

Request Fulfillment⁶

A **service request** is the act of a user asking to be provided with, or access to a supported IT service. Service requests are typically small changes that are low risk, frequently performed and low cost. Examples of service requests include installation of software onto a user’s workstation, relocating a workstation to a new office, resetting a user’s forgotten password, or simply requesting information. Request fulfillment is the process responsible for managing the lifecycle of all service requests.

⁴ Axelos. *ITIL® Service Operation* (Crown Copyright 2011), 72

⁵ Axelos. *ITIL® Service Operation* (Crown Copyright 2011), 72

⁶ Axelos. *ITIL® Service Operation* (Crown Copyright 2011), 86

CaTS Incident Management

The CaTS Incident Management process was developed over the course of the first 6 months of 2016 by the ITSM/RF-IM Project Team led by Jonathan Jackson and comprised of a cross-section of CaTS staff. The team spent many hours using ITIL best practice to develop the process to fit the needs of both the university and CaTS.

Refer to the CaTS Incident Management document at: www.wright.edu/itsm

CaTS Request Fulfillment

The CaTS Request Fulfillment process was developed over the course of the first 6 months of 2016 by the ITSM/RF-IM Project Team led by Jonathan Jackson and comprised of a cross-section of CaTS staff. The team spent many hours using ITIL best practice to develop the process to fit the needs of both the university and CaTS.

Refer to the CaTS Request Fulfillment document at: www.wright.edu/itsm

ServiceNow

Introduction

ServiceNow is a suite of cloud-based applications for enterprise IT management. It is built and designed around ITIL best practices. Organizations deploy ServiceNow to create a single system of record for enterprise IT and other support departments, lower operational costs, and enhance efficiency.

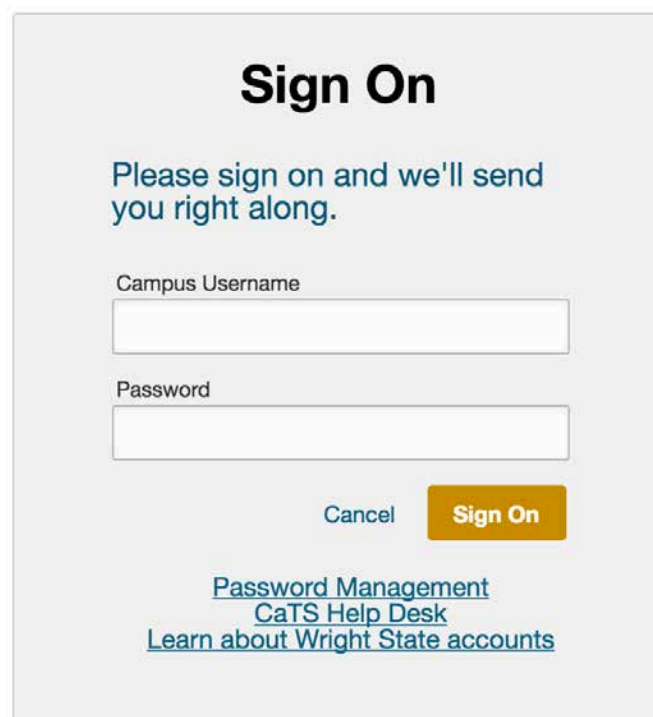
- Cloud-based – easily accessible using any supported web browser
- Modular applications such as Incident Management, Problem Management and Change Management provide relationships between work performed within each application and creates a record of work performed.
- Non-IT applications such as HR, Legal, Audit/Compliance and Facilities

Logging In

To login to ServiceNow, use one of the following URLs:

- For training/testing: <https://servicenow-test.wright.edu/>
- ~~For production: <https://servicenow.wright.edu/>~~ (Please do not use until Go-Live on August 2nd)

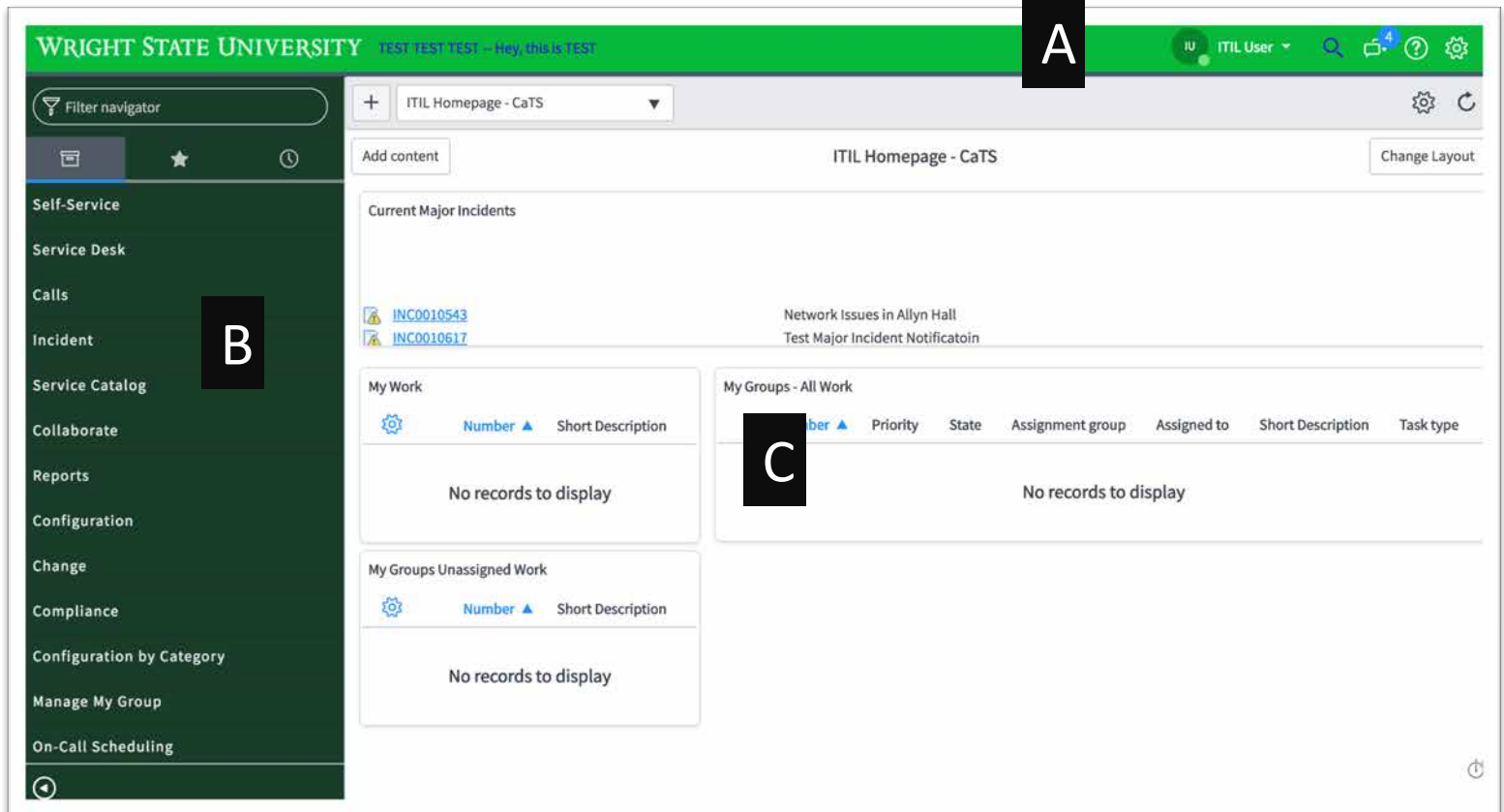
ServiceNow utilizes the university's Single Sign-on (SSO) provider, Ping Identity. If you are already logged into the Ping service (e.g., via the WINGS portal) you should be directed directly into the ServiceNow instance. If you aren't logged into the Ping service, you will be directed to the university's login page. To log in, enter your Campus username and password.



The image shows a 'Sign On' login form. At the top, the title 'Sign On' is in large, bold black font. Below it, a message in blue text says 'Please sign on and we'll send you right along.' There are two input fields: 'Campus Username' and 'Password'. Below the 'Password' field, there are two buttons: a blue 'Cancel' button and an orange 'Sign On' button. At the bottom, there are three links in blue text: 'Password Management', 'CaTS Help Desk', and 'Learn about Wright State accounts'.

General Navigation

After logging in you will be taken to the ServiceNow instance



A – Banner Frame

B – Application Navigator

C – Content Frame

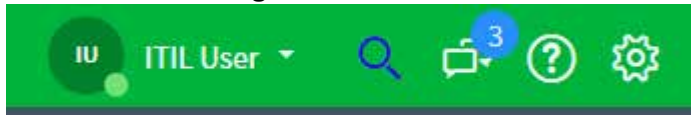
Banner Frame

The Banner Frame runs across the top of every page and contains the Wright State University logo and global navigation controls.

Clicking the logo will return you to your Homepage

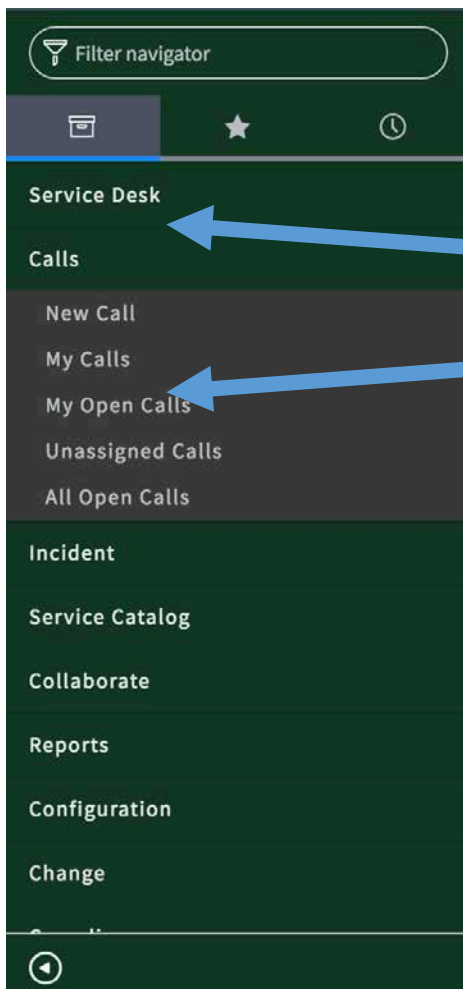


The items on the right side of the Banner Frame include:



- **User Menu:** Pulldown menus that contains links to view your profile and logout.
 - Note: Logout is currently controlled by the Ping IdP service and will not function as expected unless you are already logged out of Ping (currently only functioning from within the WINGS portal)
- **Global Search:** Searches content, including tickets.
 - This is one of the easiest places to type a ticket number to find an existing ticket.
- **Help:** Links to help resources contained within the instance (currently the default documentation) as well as training/documentation provided by ServiceNow on their docs.servicenow.com website
- **Settings:** User interface, themes, time format, timezone settings, accessibility features.

Application Navigator

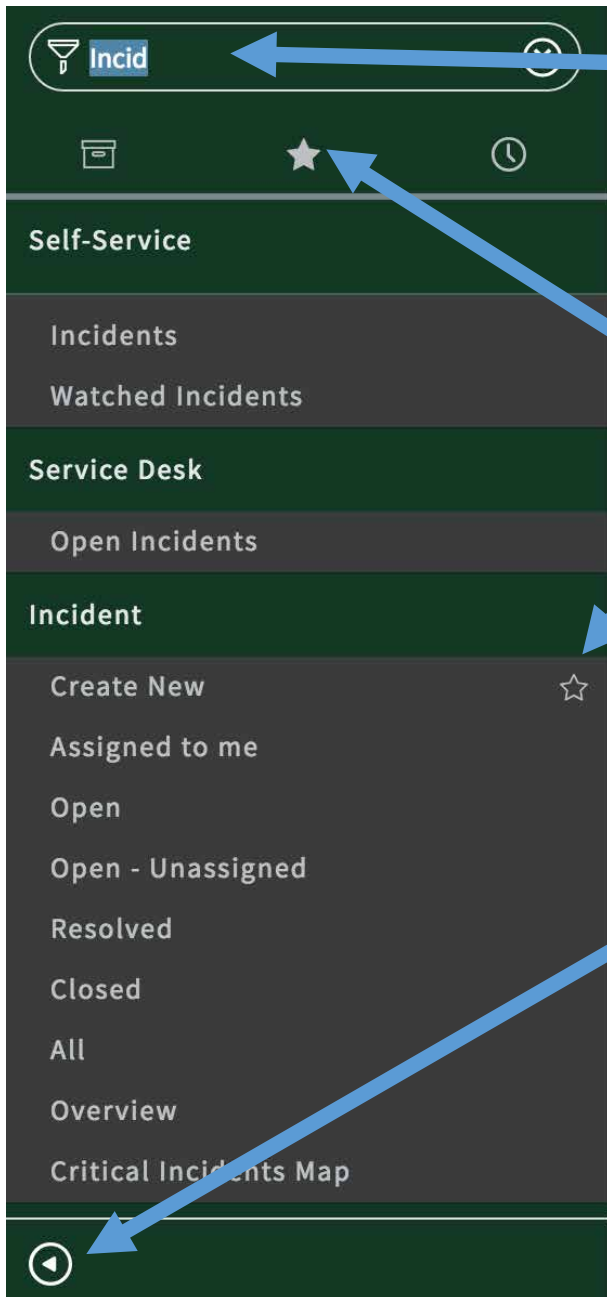


The application navigator shows you the applications that you currently have access to use. These include applications such as **Service Desk**, **Calls**, **Incident**, **Service Catalog**, etc.

Each application menu is collapsible by clicking on the application title.

When the application is expanded, you will see the available modules of that particular application.

Filter Navigator and Favorites



You can use the Filter navigator to type an application name or module. As you type, the filter will dynamically present applications matching the search term.

Applications or modules that you mark as a favorite will appear within the Favorites menu.

You can mark an application or module as a "Favorite" by mousing over the menu option and clicking into the star icon.

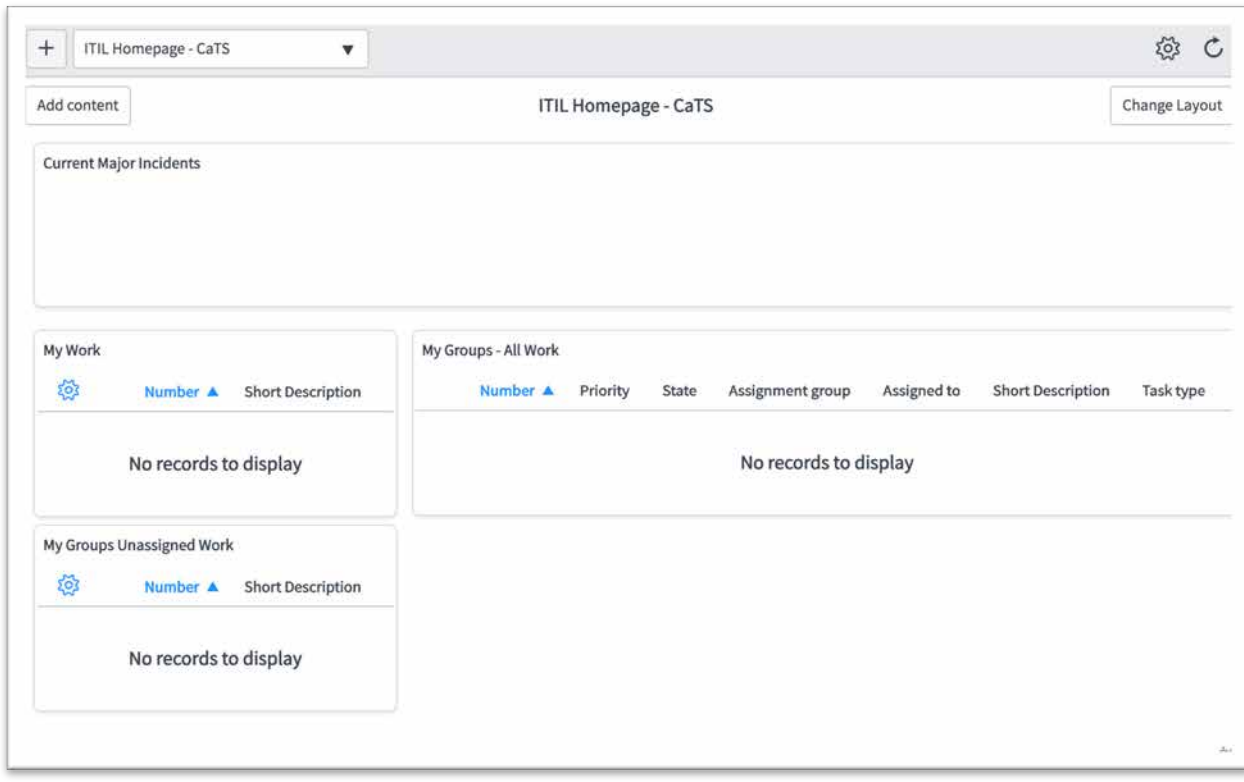
As you begin using the Content Frame in the next section, there may be times that you need additional screen "real estate". If you find yourself in this situation, you can minimize the Application Navigator by clicking the left-pointing arrow in the lower-left corner.

Doing this will show small icons representing items that you've marked as a Favorite.

Clicking the arrow again will expand the Application Navigator to full size.

Content Frame

The Content Frame is the primary location for doing work within ServiceNow. When you first login to ServiceNow you will be shown the default Homepage. The default Homepage will show items configured by the ServiceNow administrators.



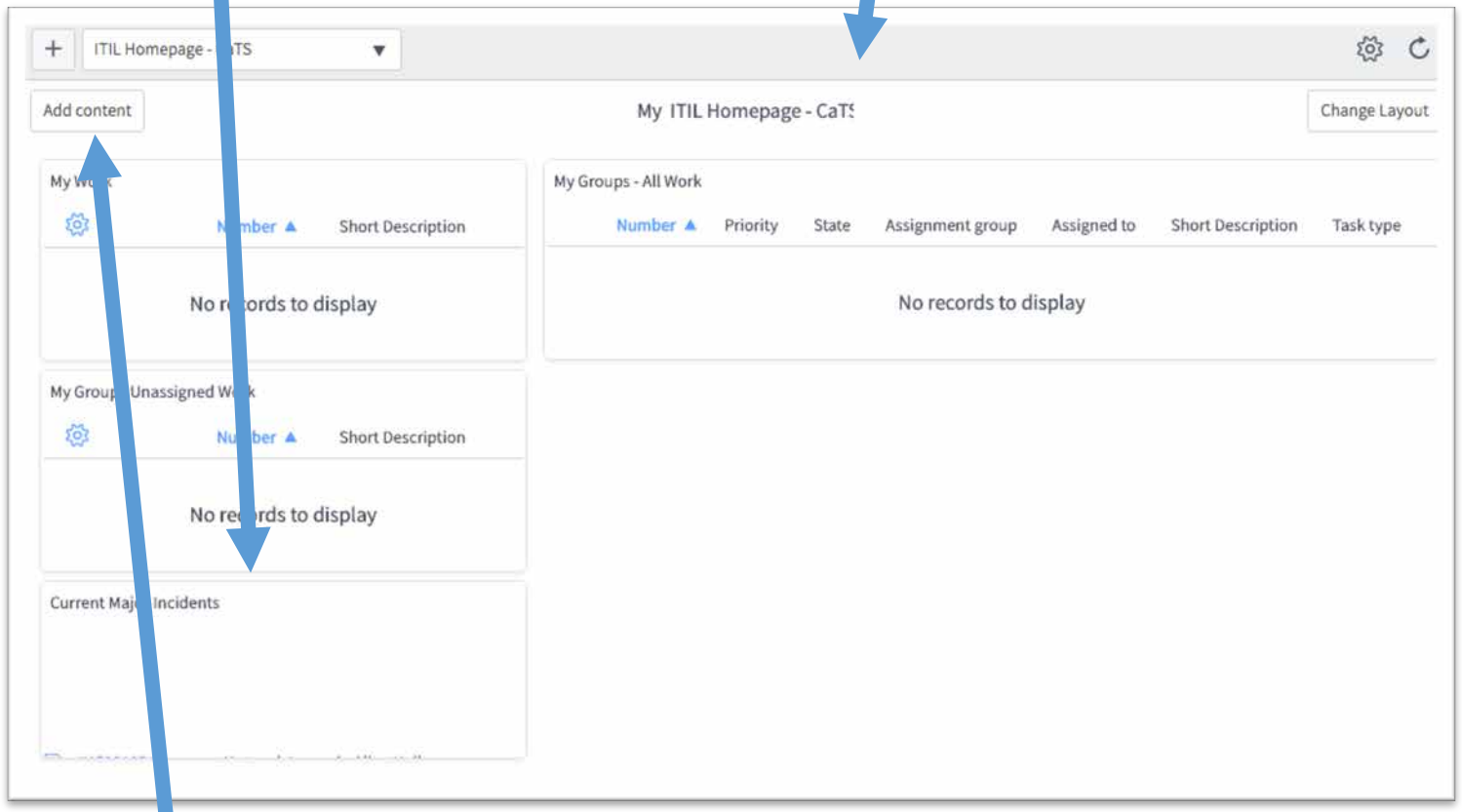
Depending on your role, the default Homepage may appear slightly different; in general, the default Homepage will have the following sections:

- **Current Major Incidents:** a scrolling list of active incidents with a priority of either 1-Critical or 2-High (prioritization discussed in a later section)
- **My Work:** a list of all work (regardless of type or application) that is assigned directly to you.
- **Open Calls Not Referred: (Help Desk staff only):** list of calls and emails sent to the Help Desk that have not yet been sent to Incident Management or Request Fulfillment workflows.
- **My Groups - All Work:** a listing of all of the work assigned to every member of your assignment groups. Users who are a member of multiple groups will see work from all groups.
- **My Groups Unassigned Work:** a list of all of your groups work that does not have an individual assigned (this was called the “Open Queue” in HEAT). Users who are a member of multiple assignment groups will see all groups’ unassigned work.

Clicking on the Number of any of the items within the lists will take you to that specific ticket.

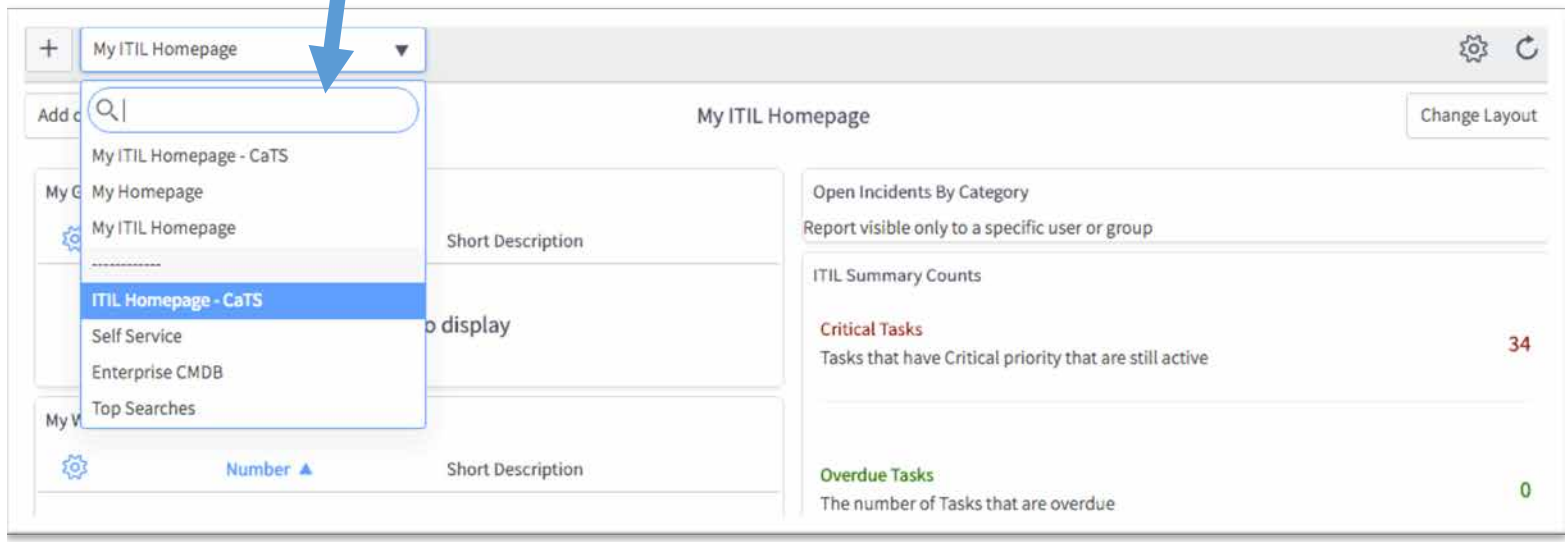
You can make modifications to any Homepage, at which point the modified page will be renamed to include “My” in front of the title.

As you can see below, this user has moved the “Current Major Incidents” gadget to a different location, and the name of the page has changed to “My ITIL Homepage – CaTS”. You can rename this Homepage by double clicking the title and typing a new name.



Users can also add new content to their Homepage by clicking the “Add content” button in the upper-left corner.

At any point, you can return to a default or customized Homepage, by clicking into the Homepage drop-down menu and selecting the Homepage you want to view.



Note:

As you use ServiceNow and switch between Homepages, ServiceNow remembers the Homepage you last used, and will show it as the default on your next login. Use the drop-down menu to return to a pre-configured or customized Homepage.

Take a few minutes to familiarize yourself with the general navigation of ServiceNow

Calls

The Calls application will be primarily used by the Help Desk to track each call received at the Help Desk. This will provide the department with metrics to better understand the types of calls received by the Help Desk and whether they are Incidents, Requests or more simple tasks such as resetting a user's password, providing them with account information, or transferring calls to another department.

The Calls application will also be used to manage incoming email sent to helpdesk@wright.edu.

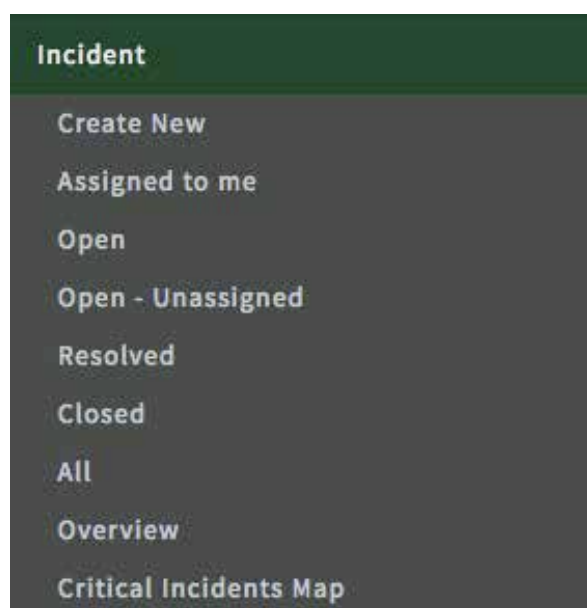
From the Calls application, Help Desk staff can transfer a call to either Incident or Request workflows depending on the content of the call record.

The staff of the Help Desk will receive separate training to use the Call application.

Incident

Refer to the CaTS Incident Management Process documentation for details on how CaTS will manage incident workflow.

The Incident application will be used to track the lifecycle of all Incidents. To access the Incident application, use the Application Navigator.



The Incident application shows the following modules:

- **Create New:** used to create/log a new incident
- **Assigned to me:** list of all open incidents assigned to you
- **Open:** list of all incidents that are not in a Closed state
- **Open – Unassigned:** list of all incidents that are not assigned to an individual technician/analyst
- **Resolved:** list of all incidents in the Resolved state
- **Closed:** list of all incident in the Closed state
- **All:** list of all incidents regardless of state
- **Overview:** shows a Homepage view of graphs and lists pertaining to incidents.
- **Critical Incidents Map:** a map view with locations identified with Major Incidents.

Create New

Click the **Create New** link to open a new incident record. The top half of the incident record is shown below:

<

≡

Incident
New record

Submit

Resolve Incident

* Short Description

Number

INC0010834

* Caller

Caller not found

☐

* Current Contact Number

undefined

* Contact Method

Phone

Caller's Alternate Contact

User's Preferred Contact

-- None --

Building \ Room

Location not found

☐

Location Details

* Category

-- None --

* Subcategory

-- None --

Configuration item

Description

* State

New

Opened by

ITIL User

Opened

2016-07-15 14:22:59

* Assignment group

Help Desk

Assigned to

* Impact

3 - Low

Impact Details

Impacts teaching and learning, or support services, for an individual or few users; or is low threat to public or life safety.

* Urgency

3 - Low

Urgency Details

Non-critical university services are affected.

Priority

5 - Planning

Priority Override

☐

You will notice a series of fields.


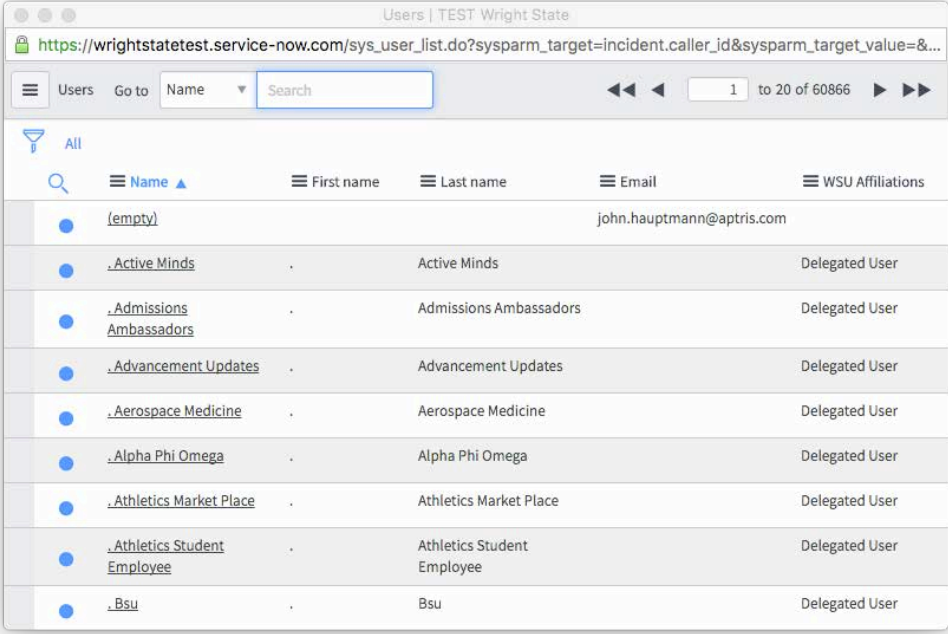


- Fields with a red asterisk * denote required fields. You will not be able to submit or save the incident record if these fields are blank
- Fields filled with a gray background are read-only fields.

Field Descriptions	
Field Name	Description
Short Description	<p>A short description of the incident. The best way to approach this field is to relate it to the subject line of an email – a concise description of the incident.</p> <p>Examples: “User can’t login”, “Workstation not powering on”, “Network Switch Failure”.</p>
Number	<p>The unique number of the incident. All incidents will begin with the letters INC. Other types of records (e.g., Requests or Calls) will begin with a different set of numbers.</p> <p>Note: INC numbers and numbers for other types of records are independently numbered, so it is possible for the INC number to match a Request number (e.g., INC00000001 and REQ00000001). The letters create the uniqueness and identify the type of ticket.</p>
Caller	<p>The user reporting or is affected by the incident. This field is searchable by First+Last Name, Username, UID, Email Address, Last Name, and Department.</p> <p>This field is auto-searchable; as you type, suggested user records are narrowed as you complete.</p>
Caller Not Found	<p>Used if the Caller is not a member of the WSU community. If this box is checked, additional fields will appear to manually type the user’s First Name, Last Name, E-Mail Address, and Current Contact Number</p>
Current Contact Number	<p>Auto-populates from the user record. The number auto-populated is the user’s phone number as it appears in the public directory. If no number appears in the directory, the field will be blank and will need to be manually populated.</p> <p>This field can also be edited in the event the user record does not have the correct number or is a different number (e.g., main department number instead of user’s actual number)</p>
Contact Method	<p>The user’s method of contact to CaTS: E-Mail, Phone, Walk-in, or Self Service</p>
Caller’s Alternate Contact	<p>An alternate contact method for user. This could be a 2nd phone number, alternate email address, administrative assistant, etc</p>
User’s Preferred Contact	<p>The preferred method the user would like CaTS to use to make contact with them for this incident.</p>
Building \ Room	<p>The building and room of the incident. This may differ from the user’s user record (e.g., a faculty member teaching in a</p>

	<p>classroom). This data is populated from Archibus, the university's system of record for facilities.</p> <p>Like the Caller field, this field auto-searches. Locations are in the format: Room XYZ Floor X Building Name</p> <p>Example: Room 031D Floor 0 Dunbar Library</p>
Location not found	<p>Used for locations not found within the Location table. Archibus only stores location data for buildings owned or leased by the university.</p> <p>If this box is checked, another field "Location" will appear that the location information can be provided.</p>
Location Details	<p>A field to provide any extra information about the user's location.</p> <p>Examples: "3rd cubicle on left", or "Need to obtain pass from front desk"</p>
Category	High-level Category of the incident
Subcategory	Dynamic field based on Category to narrow the categorization of the incident.
Configuration Item	<p>A configuration item (CI) is any component that an IT organization wants to track. This could be software, enterprise applications, workstations, servers, network equipment, HVAC units, UPS, generators, etc.</p> <p>This field is used to identify the CI exhibiting the incident.</p> <p>At the current time enterprise applications (e.g., WINGS, Pilot, Pharos, etc), Workstations in Active Directory (e.g., P-001122334455) and printers are loaded into the CI table.</p>
Description	A longer description of the Incident that was initially described in Short Description
State	<p>The current State of an Incident. Possible States include:</p> <ul style="list-style-type: none"> • New – A new incident • Referred – Referred to a group or individual for work • Work-in-progress – Incident is actively being worked on • Awaiting Customer – Analyst/technician is awaiting feedback from the customer • Awaiting Vendor – Incident is awaiting a 3rd party vendor in order to resolve

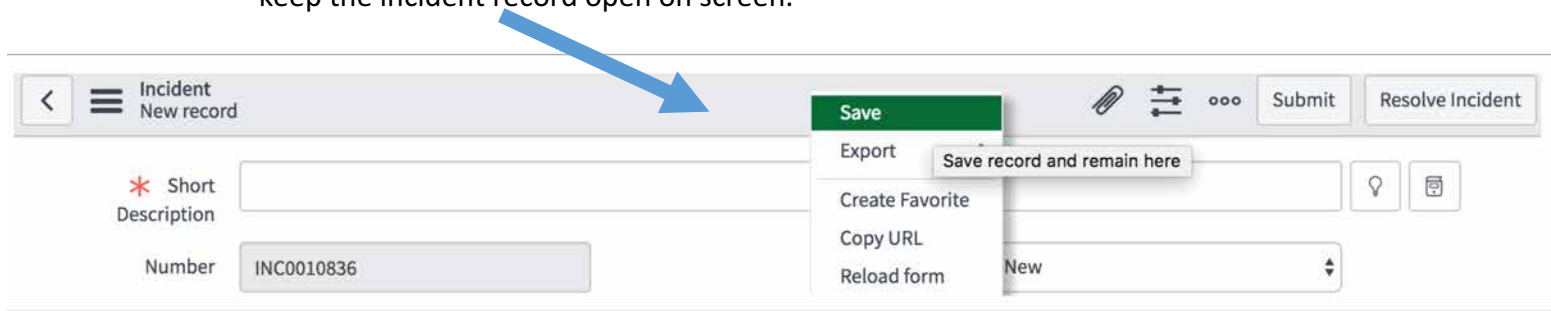
	<ul style="list-style-type: none">Awaiting Change – (Not currently used) Incident is awaiting a change to be performed in order to be resolvedAwaiting Evidence – Incident is not able to be reproduced and is awaiting further details to assist in resolution.Resolved – Incident has been resolved and is awaiting user confirmation.																						
Opened by	The user or analyst that opened the incident																						
Opened	Date/time the incident was opened																						
Assignment group	The assignment group currently assigned the incident. Use this field to assign to another group.																						
Assigned to	The individual analyst/technician assigned to work the incident.																						
Impact	The impact of the incident, generally a reflection of the number of users affected by an incident.																						
Impact Details	Read-only field to provide a definition of Impact selections																						
Urgency	How critical the affected service is to the business of the university.																						
Urgency Details	Read-only field to provide a definition of Urgency selections																						
Priority	<p>Read-only field showing the priority of the incident, based on the following matrix:</p> <table><tr><td></td><td colspan="4">Impact</td></tr><tr><td rowspan="4">Urgency</td><td></td><td>1 – High</td><td>2 – Medium</td><td>3 – Low</td></tr><tr><td>1 – High</td><td>1 – Critical</td><td>2 – High</td><td>3 – Medium</td></tr><tr><td>2 - Medium</td><td>2 – High</td><td>3 – Medium</td><td>4 – Low</td></tr><tr><td>3 - Low</td><td>3 – Medium</td><td>4 - Low</td><td>5 - Planning</td></tr></table>		Impact				Urgency		1 – High	2 – Medium	3 – Low	1 – High	1 – Critical	2 – High	3 – Medium	2 - Medium	2 – High	3 – Medium	4 – Low	3 - Low	3 – Medium	4 - Low	5 - Planning
	Impact																						
Urgency		1 – High	2 – Medium	3 – Low																			
	1 – High	1 – Critical	2 – High	3 – Medium																			
	2 - Medium	2 – High	3 – Medium	4 – Low																			
	3 - Low	3 – Medium	4 - Low	5 - Planning																			
Priority Override	<p>Used by an analyst to override the default priority, and will allow them to select a priority they deem appropriate.</p> <p>When selected a field “Priority Override Justification” will appear required the analyst to provide a reason for using the override.</p> <p>All priority overrides will be reviewed by CaTS Management to determine why the override was selected and whether the default priority matrix is insufficient.</p>																						

As you navigate the incident record, you will notice icons appearing to the right of certain fields.

	<p>The magnifying glass icon indicates that the field is a reference to another table within the ServiceNow database. You can generally type into these fields and you will be presented with suggested records based on the existing text in the field.</p> <p>Alternatively, you can click the icon to pop-open a new window that provides more advanced searching and filtering options to select the appropriate record.</p>
	
	<p>The information icon appears next to reference fields to provide you the option to view more detailed information about that particular record.</p> <p>Mousing-over the icon will display an overlay window with the information.</p> <p>Clicking the icon will take you to that particular record.</p>
	<p>The related records icon will appear if that particular record has other related Incidents.</p> <p>For example, if this icon appears next to the Caller record it indicates that the Caller has submitted other incidents. Clicking the icon will open a window displaying these related records.</p>

Once you complete all required fields, there are two ways to save the incident:

1. Right-click in the Incident header and select Save. This will save the Incident and will keep the incident record open on screen.



2. Click the "Submit" button. This will save the incident and will return you to a listing of open Incidents.



This same Save vs. Submit/Update logic applies to many types of records in ServiceNow and will be utilized in other applications.

Take a few minutes to familiarize yourself with completing the top portion of the Incident record and saving an Incident.

Feel free to log multiple Incidents, and assign them to individuals seated around you.

Working Existing Incidents

Once an incident is saved, you can navigate to the incident record by one of the following ways:

- Locating the record in a gauge on the Homepage
- Locating the record via an application module within the Application Navigator
- Typing the incident number into the Global Search

Once the incident record is opened, you will see the same screen as you did when you created the incident.

Once you begin to work an incident, change the **State** to **Work-In Progress**.

The screenshot shows the Incident Management interface for incident INC0010835. The header includes a back arrow, a menu icon, the incident title 'Incident INC0010835', and action buttons: 'Follow', 'Update', 'Resolve Incident', and 'Delete'. The main form contains fields for 'Short Description' (Test), 'Number' (INC0010835), 'Caller' (Jonathan Jackson), 'Current Contact Number' (937-775-4857), and 'Contact Method' (Phone). The 'State' dropdown menu is open, showing options: 'New', 'Referred', 'Work-In Progress' (selected), 'Awaiting Customer', 'Awaiting Vendor', 'Awaiting Change', 'Awaiting Evidence', 'Resolved', and 'Closed'. Other fields like 'Opened by', 'Opened', 'Assignment group', and 'Assigned to' are also visible.

It is also a good idea to change the **Assigned to** field to your name, if it isn't already.



Note:

Changing the State to Work-In Progress does two important things:

1. Let's the Help Desk and user (via Self-Service) know that someone is working the incident and the incident isn't sitting in queue.
2. Stops the Service Level Target for Response time (see table in Appendix A)

Once you have changed the State of the incident, you can either Save the incident by right-clicking in the Incident header, or click Update. The behavior of these two actions is the same as it was when you initially created an Incident: Saving will keep the incident record on screen; clicking Update will take you to a list of incidents.

Incident Notes and Additional Comments

With an Incident record open, when you scroll down to the second half of the screen (below the Description field), you will see additional options within the Incident record. If you have Tabbed forms enabled within Settings (in Banner Frame), you will see three tabs; otherwise the following content will be listed vertically on screen

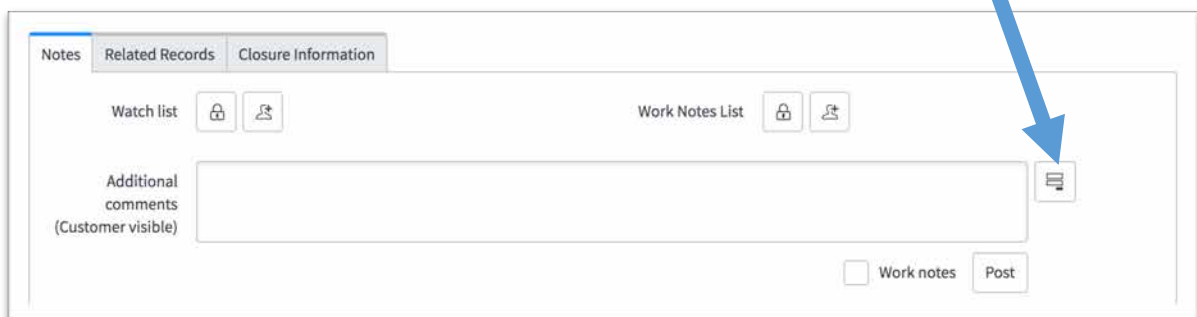
- **Notes:** contains fields for Additional comments, Work Notes, Activity log and watch lists
- **Related Records:** contains information for other records that are related to the incident. This includes Parent incident (used to link multiple incidents records together), and incidents caused by Changes (not yet used)
- **Closure Information:** contains field that required to resolve/close an incident

A screenshot showing three tabs at the top of a form: 'Notes' (which is selected and highlighted with a blue underline), 'Related Records', and 'Closure Information'.

Notes tab

Show all/one Journal Field

On the Notes tab, to the right of the Additional comments/Work notes field is a box allowing a technician to view the Additional comments and Work notes fields as either two fields, or a single field. Toggle this option back and forth to see what changes.

A screenshot of the 'Notes' tab in the incident record form. It shows fields for 'Watch list', 'Additional comments (Customer visible)', and 'Work Notes List'. At the bottom right, there is a checkbox labeled 'Work notes' and a 'Post' button. A blue arrow points to a small icon (a document with a plus sign) located to the right of the 'Additional comments' field, which is used to toggle the 'Show all journal fields' option.

When the “Show all journal fields” is enabled, the “Additional comments” and “Work notes” fields appear as two separate fields.

A screenshot showing the 'Work notes' and 'Additional comments (Customer visible)' fields as two separate, stacked input boxes. The 'Work notes' field is on top, and the 'Additional comments' field is below it. A 'Post' button is located at the bottom right of the 'Additional comments' field.

When the “Show one journal field” is active, the “Additional comments” and “Work notes” field appears as a single field with a checkbox to flag the content as a “Work note”

The screenshot shows a software interface with a 'Notes' tab selected. Below the tab are two sections: 'Watch list' and 'Work Notes List', each with a lock icon and a user icon. The 'Additional comments (Customer visible)' field is a large text area. To its right is a 'Work notes' checkbox and a 'Post' button. A blue arrow points from the text above to the 'Work notes' checkbox.

Additional Comments

Comments entered into the “Additional comments field will be visible to the user via Self-Service; and the user will receive an email with the content of the particular comment added.

This field will be the primary method used to communicate to the user via email

This screenshot is similar to the one above, showing the 'Notes' tab and the 'Additional comments (Customer visible)' field. A blue arrow points from the text above to the text area of the 'Additional comments' field.

If the user replies to the email received via Additional comments, the content of their email will appear in the Activity stream below the note fields.

Work Notes

If a technician wants to make notes pertaining to an Incident, but does not feel the user needs to be made aware of the note, they can create a “Work note”.

To make a Work note, simply type into the Work notes field, or check the “Work notes” checkbox if viewing the fields as a single field.



Note:

Ultimately it’s up to you how to configure your Notes fields; however, we recommend leaving them as two fields to reduce the chance of accidentally sending the user a Work note.



Note:

Although the content of Work notes is not readily visible to the user, the content entered into this field should be considered a public record that could be viewed by a student submitting a FERPA records request, or a member of the general public submitting a public records request.

Activity Stream

Beneath the Additional comments/Work notes field is the activity stream for the incident. This shows all comments, notes and other applicable activity of the incident including changes of priority, incident state, and emails sent from ServiceNow.

Watch list

The watch list is a listing of users and/or email addresses that will receive Additional comments entered into the incident record. By default, the user listed in the Caller field will receive these comments. There may be cases where a technician wants to add co-workers to the Watch list; or a Help Desk Analyst adding themselves to the Watch list prior to escalating the incident to

Tier 2. This allows the Help Desk Analyst receive information pertaining to the ticket, which may assist them in resolving a similar incident in the future.

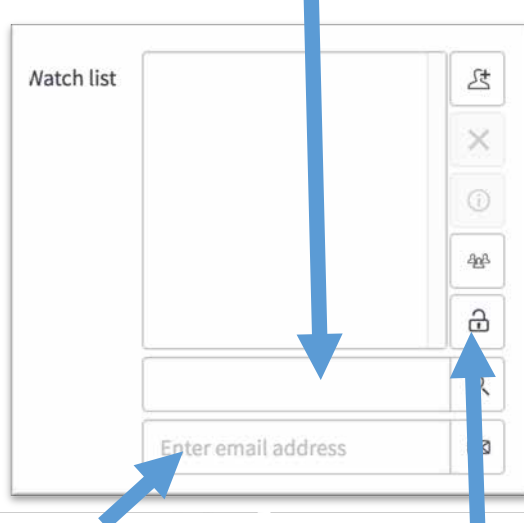
To add yourself to the Watch list, click the Add me icon.



To add someone else to the Watch list, click the “Edit Watch List” icon



You can now use the user lookup field to add users to the Watch List.



Or you can enter an email address.

Click the Lock icon to exit the editor.

Save the Incident record.

Work Notes List

The Work Notes List behaves the same as the Watch List, the only exception being that individuals added to this list will receive content added as Work notes.

Take a few minutes to familiarize yourself with access existing Incidents and using the Additional comments and Work notes fields; and adding users to Watch and Work notes lists.

Feel free to log new Incidents, and assign them to individuals seated around you.

Related Records

The related records tab has fields to relate an incident to a Change record (not currently being used), or to a parent incident.

Parent Incident

The parent incident relationship can be used when numerous incidents are being created for the same issue (e.g., a widespread outage). One incident can be designated as the “parent” incident; then for each additional (e.g., “child”) incident created, it can be linked to the parent incident.

Work notes and Additional Comments added to the Parent incident will be copied into each Child incident; so care must be taken to avoid identifiable information when adding comments to the parent incident.

Further, when a parent incident gets marked as “Resolved”, each child incident will also be placed into the “Resolved” status, and applicable notifications will be sent to the user of each incident.

Take a few minutes to familiarize yourself parent/child incidents.

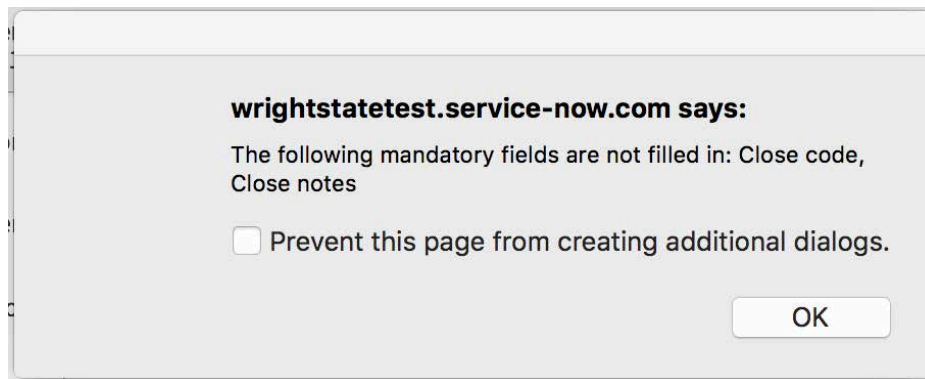
1. Create an Incident, making note of the INC number.
2. Create another Incident and make the Incident in Step 1 the parent.
3. Create a third incident and also relate it to the original incident.
4. Add comments and work notes to the parent incident.

Resolving an Incident

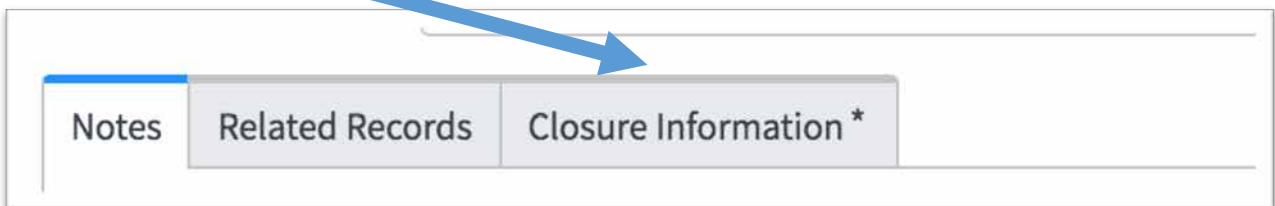
Once you are ready to resolve an incident, click the “Resolve Incident” button from within the Incident header.



You will likely be presented with a warning that there are required fields that have not been completed.



The required fields are located on the “Closure Information” tab, which has now been indicated with an asterisk (*)



Clicking into the Closure Information tab will show fields highlighted in red



Close code provides metrics as to how the Incident was resolved as detailed in the following table

Closed notes provides detail as to the cause of incident, tasks to find resolution, tasks to resolve, etc.

Closure Code	Meaning
Solved (Work around)	Incident was resolved using a work around. A work around provides the user the ability to continue their work, but in a slightly different way. This could be using a different web browser, or having a hardware device temporarily replaced with a loaner.
Solved (Permanently)	Incident was resolved without the use of a work around.
Solved Remotely (Work Around)	Incident was resolved remotely (either via phone, email, or Bomgar) using a work around.
Solved Remotely (Permanent)	Incident was resolved remotely without the use of a work around.
Not Solved (Not Reproducible)	Reported issue is no longer appearing and is not able to be reproduced.
Not Solved (Too Costly)	Incident was not resolved due to cost. An example could be an out-of-warranty repair is needed; however, the department chooses not to spend the money to fix.
Not Solved (Not a Supported Application/Service)	Reported incident was for an application or service that is not supported by CaTS (e.g., Gmail login issues, Pokemon Go connectivity, etc)
Closed/Resolved by Caller	Caller/user found their own solution. Users are able to resolve their own Incidents via self-service.

Other Fields:

Closure CI: If the CI causing the Incident differs from the one listed at the top of the incident record, it can be added here.

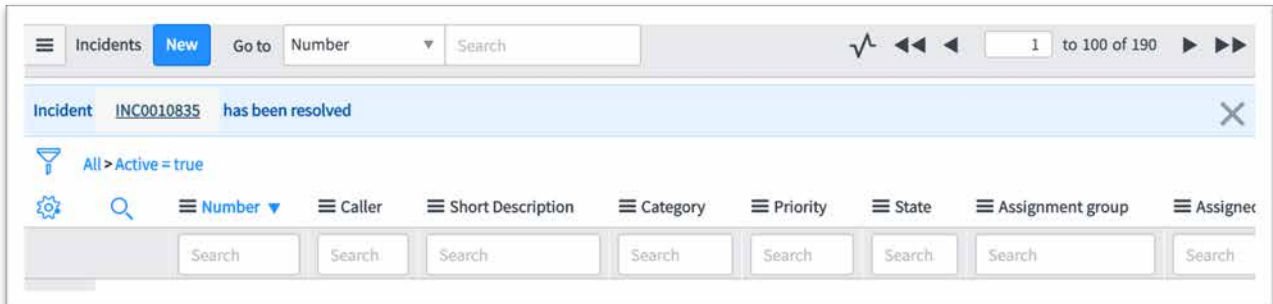
Closed by: Technician that closed the Incident – this will be auto-populated

Closed: Data/time incident was closed – this will be auto-populated

Once you have entered a Close code and Close notes, click the “Resolve Incident” button to resolve the Incident.

The screenshot shows the 'Incident' record for INC0010835. The 'Closure Information' tab is active, displaying a 'Close code' dropdown set to 'Solved (Permanently)' and a 'Close notes' text area containing 'Removed workstation from domain and re-added.' The top toolbar includes buttons for 'Follow', 'Update', 'Resolve Incident' (highlighted by a blue arrow), and 'Delete'.

You will be directed to a listing of all active Incidents, and will receive a notification that the Incident has been resolved.



Take a few minutes to resolve some of the Incidents you've created.

Feel free to create additional incidents to resolve.

Feel free to assign new incidents to those seated around you for practicing working with incidents assigned by others.

Requests/Service Catalog

ServiceNow organizes Service Requests into the “Service Catalog” application.

A service catalog, within the ITIL framework is, “all live IT services, including those available for deployment”⁷. One of the easiest ways to think about a service catalog is a menu of services, it lists each service, cost (if applicable), expected availability (24/7 vs. 8-5), response and resolution times for incidents, etc. Eventually, CaTS will formally identify every service offered by the department and build them into the Service Catalog; however, for our initial deployment the service catalog will be sparsely populated with the intention to grow.

Requests, Requested Items, and Tasks

ServiceNow organizes individual service requests into three tiers of records. At the highest level is a Request – identified as an **REQ** number in the system. The easiest way to think about a Request record is to think of it as an order within an e-commerce system (e.g., Amazon).

Within a Request, multiple Requested Items may be added. A Requested Item is identified in ServiceNow with an **RITM** number. The RITM is the actual item, or service being requested.

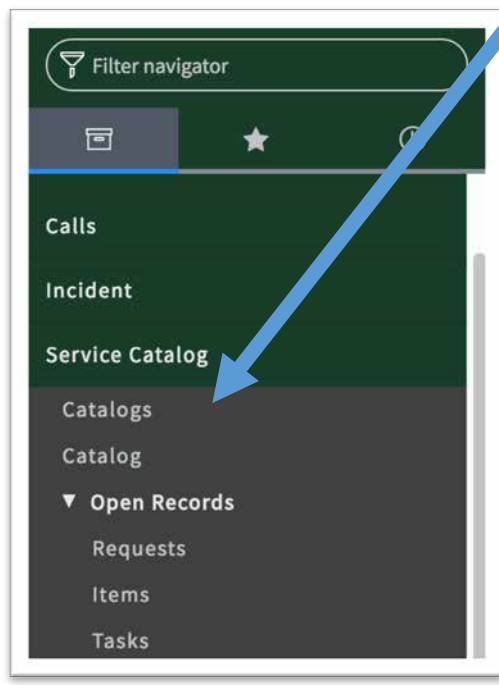
Finally, at the lowest level, each RITM record may have multiple Task records. These are identified by a **TASK** number and represent literal tasks that must be completed in order to fulfill the overall request. Tasks can be create automatically via pre-designed workflows based on actual business processes, or can be created manually as needed for a particular request.

A representation of the relationship between Requests, Request Items and Tasks is shown in the table on the next page.

⁷ Axelos. *ITIL® Service Operation* (Crown Copyright 2011), 24

Request	Request Item	Task
New Workstation Setup		
	Setup Workstation	
		Configure Workstation
		Assign IP Address
	Setup Printer XYZ	
		Install Printer Software
	Install Adobe Software	
		Install software
New Employee Account		
	AD/LDAP Account	
		Provision Account
	Banner Admin Acct	
		Supervisor Approval
		Data Owner Approval
		Provision Account

Accessing the Service Catalog



From the “Service Catalog” application, click on “Catalogs”.

This will show you a listing of all catalogs configured. As more departments use ServiceNow (e.g., HR, Facilities) there will be multiple catalogs which define each department’s services.



The CaTS Service Catalog appears as a link, click on it to see Service Requests that are currently available.

The screenshot shows a web interface titled "How Can We Help You". It contains several expandable menu items, each with a minus icon on the left:

- General Request**
 - General WSRI Request
- Report a Problem**
 - Report an Incident
- Physical Plant**
 - Project Initiation
- ServiceNow Enhancement and Defect Reporting**
 - Report a Defect - ServiceNow
 - Request an Enhancement - ServiceNow
- Accounts and Access**
 - Account/Name Change Request
 - Alumni Account
 - Generic Account Request
 - Network Shared Area Request

A refresh icon is located in the bottom right corner of the menu area.

Creating a Request

Click into the "General Request" within the top "How Can We Help You" section.

The General Request will be the request we will use for most requests until we can develop more request workflows.

You will notice field very similar to those seen on Incident:

Short Description: a short description of the request

Requested For: the user requesting the service

Date Required: the user or analyst can enter a date that the user would like the request to be completed

Urgency: how quickly the user would like the request fulfilled

Description: longer field to provide more detailed description of the request.

The screenshot shows a "Request form to submit a general request". The form includes the following fields:

- Short Description:** A text input field.
- Requested For:** A text input field containing "Jonathan Jackson" with search and help icons.
- Date Required:** A date picker field.
- Urgency:** A dropdown menu set to "3 - Moderate".
- Description:** A large text area for detailed description.

On the right side of the form, there is a summary section:

- Order this Item:**
 - Quantity: 1
 - Delivery time: 1 Day
 - Order Now** (highlighted with a blue arrow)
 - Add to Cart
- Shopping Cart:** Empty

Once the details of the request are entered, click the “Order Now” button.

You are now taken to the status page for the particular request.

You will notice that a Request Number has been created.

The screenshot shows a web interface for a request status page. At the top, a green banner reads "Thank you, your request has been submitted" with a close button (X). Below this, the following information is displayed:

- Order Placed: 2016-07-20 08:42:31
- Request Number: [REQ0010168](#) ☆
- Estimated Delivery Date of Complete Order: 2016-07-29

A table follows with the following columns: Description, Delivery Date, Stage, Price (ea.), Quantity, and Total.

Description	Delivery Date	Stage	Price (ea.)	Quantity	Total
Request form to submit a general request	2016-07-29	✓ → ○ ○ ○ ○		1	
Total					-

Four blue arrows point to specific elements: one to the Request Number, one to the Description link, one to the Stage icons, and one to the arrow icon within the Stage icons.

You will also notice the Stage in which the request is currently in. This provides the user an idea of where the request is in process. Mousing-over these icons will show some detail of the stage. Also, you can click the arrow next to the stage icons to see a fuller description of the stages.

The item listed in the Description is the Requested Item, click into this to see more detail.

Requested Item
RITM0010170

Number: RITM0010170

Item: General Request

Request: REQ0010168

*Requested for: Jonathan Jackson

Opened by: Jonathan Jackson

Watch list: [Add] [Remove]

*State: Open

Approval: Requested

Stage: Review

Opened: 2016-07-20 08:42:30

Due date: 2016-07-29 08:42:17

Variables

Short Description: Would like Office 2016 installed

Requested For: Jonathan Jackson

You will see a number of fields:

Number	The Request Item number, notice this number begins with RITM
Item	Which Service Catalog Item is used to process this request
Request	The Request number (REQ) that this RITM is apart of
Requested for	The user this request is for
Opened by	The user that opened the request – note this may be the same as Requested for if the user used the Self Service portal
Watch List	Just like Incidents, a Watch List is used to send communication of the request to multiple individuals
State	The current State of the Request.
Approval	If an approval is necessary, what state the approval is in
Stage	What stage of the request workflow the current Item is in
Opened	Date and time the Request was opened
Due date	The date required that was entered by the user

Below the default RITM fields, you will then see **Variables** that were entered for this particular RITM.



Note:

Depending on the Service Catalog Item, the variables will be different due to the necessary data needed in order to process the request.

Below the variables, you will see the “Additional Comments” field. Just like Incidents, text entered into this field will be visible to the user and will be sent via email upon submission.



Additional comments
(Customer visible)

Post

Scrolling further will take you to the “Catalog Tasks” and “Approvers” sections.

The Catalog Tasks will show you all tasks currently active for this particular RITM. You’ll notice in our example, there is a Task currently assigned to the Help Desk to review the request to ensure it is a valid request and has appropriate amount of information. Click into the TASK record

Catalog Tasks (1)

Approvers

Group approvals

≡

Catalog Tasks

New

Go to

Number

▼

Search

◀◀

◀

1

to 1 of 1

▶

▶▶

🔍

Request item = RITM010170

⚙️

🔍

≡ Number ▼

≡ Assignment group

≡ Assigned to

≡ Short Description

≡ Actual start

≡ Actual end

📄

🕒

[TASK0010193](#)

[Help Desk](#)

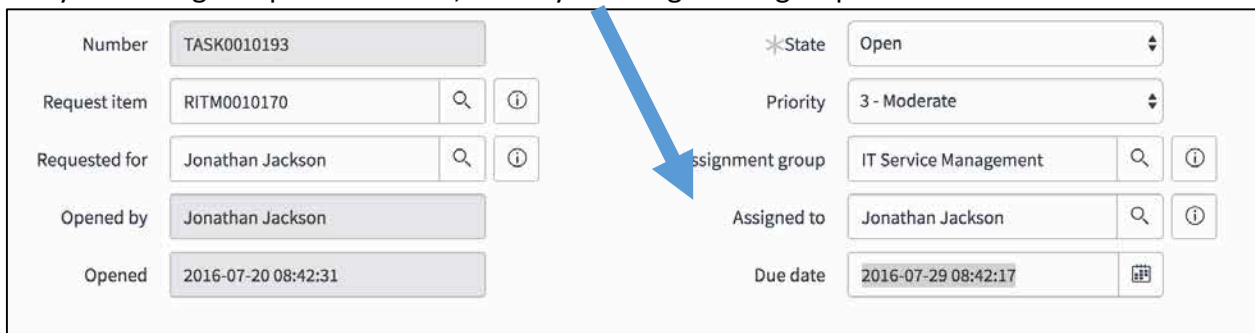
Review the Request for completeness and appropriate approvals

(empty)

(empty)

Within the task record, similar to the RITM record, you will see overall details of the request and request item.

Along the right column you will see Assignment group and Assigned to fields. Since you are the analyst working this particular task, select your assignment group and name.



Number	TASK0010193	*State	Open
Request item	RITM0010170	Priority	3 - Moderate
Requested for	Jonathan Jackson	Assignment group	IT Service Management
Opened by	Jonathan Jackson	Assigned to	Jonathan Jackson
Opened	2016-07-20 08:42:31	Due date	2016-07-29 08:42:17

Scrolling down the TASK record will show you the variables that were entered into the RITM along with the Short Description and Description fields.

You will also notice the Work Notes and Additional Comments fields.

*Short Description: Review the Request for completeness and appropriate approvals

Description: [Empty text box]

Work notes: [Empty text box with a yellow vertical bar on the left]

Additional comments (Customer visible): [Empty text box]

Post

Once you've completed your work on this TASK, you can click the "Close Task" button.

< ≡ Catalog Task TASK0010193 [Icons: link, graph, list, menu] Follow Update Close Task [Icons: up, down]

The system will now return you to the RITM record.

Recall, the TASK we just completed was the Help Desk's task to ensure the appropriate amount of detail was captured in the Request. Because we're using a generic request, we aren't able to collect specific data from the user at the time of submission.

Scroll down the RITM record, and we'll see that a new TASK has been created to Fulfill the request.

Catalog Tasks (2) | Approvers | Group approvals

Request item = RITM0000170

	Number	Assignment group	Assigned to	Short Description	Actual start	Actual end
<input type="checkbox"/>	TASK0010194	Help Desk		FULL: Fulfill the request	(empty)	(empty)
<input type="checkbox"/>	TASK0010193	IT Service Management	Jonathan Jackson	Review the Request for completeness and appropriate approvals	(empty)	2016-07-20 09:12:05

At this point, the Help Desk will change the Assignment group to the appropriate group to fulfill the Request.

To change the Assignment group, click into the TASK record and change the Assignment group.

For this example, I'm going to select **Desktop Services** and then Update the record.

Number	TASK0010194	*State	Open
Request item	RITM0010170	Priority	3 - Moderate
Requested for	Jonathan Jackson	Assignment group	Desktop Services
Opened by	Jonathan Jackson	Assigned to	
Opened	2016-07-20 09:12:05	Due date	2016-07-29 08:42:17

The members of the Desktop Services group will now receive an email informing them that a Task has been assigned to their group.

Catalog Tasks (2)ApproversGroup approvals

≡Catalog TasksNewGo toNumberSearch

◀◀◻1to 2 of 2▶▶

🔍Request item = RITM0010170

⚙️🔍≡Number▼≡Assignment group≡Assigned to≡Short Description≡Actual start≡Actual end

☐	📘	TASK0010194	Desktop Services		FULFILL: Fulfill the request	(empty)	(empty)
☐	📘	TASK0010193	IT Service Management	Jonathan Jackson	Review the Request for completeness and appropriate approvals	(empty)	2016-07-20 09:12:05

Click into the newest Task record.

We'll assume we've done the necessary work to complete this task, so we'll now click the "Close Task" button.

You will notice that a final Task has been created to confirm with the user that the request has been fulfilled to their satisfaction. We'll assume this is the case and we'll close this task.

Once all Tasks have been successfully completed, you will notice that the State of the RITM changes to "Close Complete".

Requested Item RITM0010170		Follow	Update	Delete
Number	RITM0010170	*State	Closed Complete	
Item	General Request	Approval	Requested	
Request	REQ0010168	Stage	Completed	

Approvals

Some request workflows require someone to approve the request in order to proceed with fulfillment. This could be the manager of the user making the request, a business manager approving funding, or the owner of data for which access is being requested.

Depending on how the workflow is designed, it is possible that certain tasks to fulfill a request won't be added to the RITM record until approvals have been granted.

As analysts in ServiceNow, we can see if a request is awaiting approval and from whom. This appears on the "Approvers" tab of a RITM record.

Catalog Tasks					
Approvers (1)					
Group approvals					
Approvers					
Edit...					
Go to					
State					
Search					
1 to 1 of 1					
Approval for = RITM0010171					
State					
Approver					
Comments					
Created					
		Requested	Kenneth Coon		2016-07-20 09:42:18

It is also possible that multiple approvers are required for a RITM. Depending on the workflow design, it is possible that some approvals won't be created until a preliminary approval is granted.

Catalog Tasks					
Approvers (4)					
Group approvals					
Approvers					
Edit...					
Go to					
State					
Search					
1 to 4 of 4					
Approval for = RITM0010171					
State					
Approver					
Comments					
Created					
		Requested	Roy Lemaster		2016-07-20 09:44:26
		Requested	Tony Whack		2016-07-20 09:44:26
		Approved	Kenneth Coon		2016-07-20 09:42:18
		Requested	Kim Everhart		2016-07-20 09:44:26

Take a few minutes to create Service Requests from the Service Catalog.

Feel free to create multiple General Requests and assign them to those seated near you.

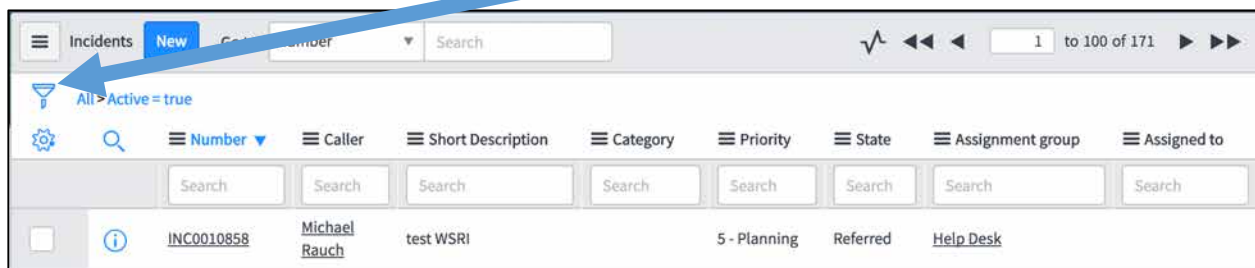
If you create a request that needs an approval, please let your instructor know and they will approve or reject the request.

Filtering and Customizing List Views

When viewing a list of records, ServiceNow provides easy filtering options to narrow the scope of the data you want to see by using the Filtering feature.

Navigate to the **Incident** application and select **Open** to view a listing of all open incidents.

Between the Incident header and the listing of incidents, you will see the Filtering icon, click it.



You will now see the filtering options. By default the filter is set to “Active is true”.

To add additional criteria to the filter, select either the “AND” or “OR” Boolean operator.

AND – will show records that match all sets of criteria

OR – will show records that match either sets of criteria.

Once you select a Boolean operator, an additional filtering option will appear allowing you to select a field from the Incident table.

Select **Opened**

Leave the second field set to “On”.

In the third field, select “This Month”.

Click “Run”.

You will notice that the list of Incidents changes to only show Incidents that were opened this month.

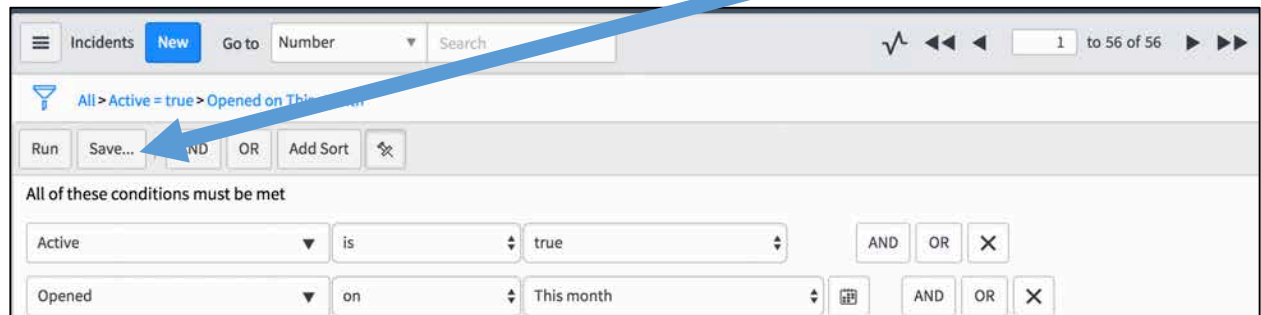
The screenshot shows a web application interface for managing incidents. At the top, there's a header with 'Incidents' and a 'New' button. Below this is a search bar with 'Go to' and 'Number' dropdowns. A filter bar shows 'All > Active = true > Opened on This month'. Below the filter bar, there are buttons for 'Run', 'Save...', 'AND', 'OR', and 'Add Sort'. The main filter area contains two conditions: 'Active is true' and 'Opened on This month', connected by an 'AND' operator. Below the filter area is a 'Run' button. At the bottom, there's a table with columns: Number, Caller, Short Description, Category, Priority, State, Assignment group, and Assigned to. The first row of data shows: INC0010858, Michael Rauch, test WSRI, 5 - Planning, Referred, Help Desk.

Number	Caller	Short Description	Category	Priority	State	Assignment group	Assigned to
INC0010858	Michael Rauch	test WSRI	5 - Planning	Referred	Help Desk		

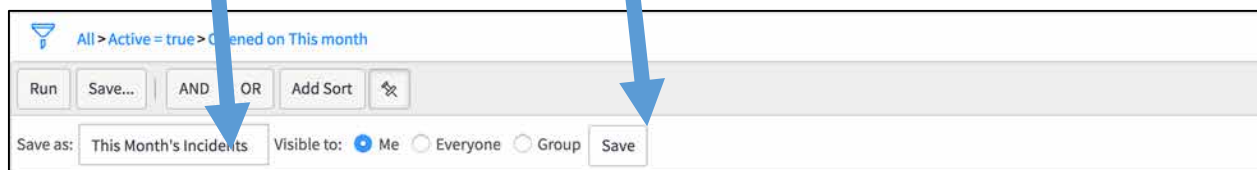
Saving Filters

If you find yourself re-using the same filters over-and-over again, you can save them.

With a filter on-screen that you want to save, click the “Save...” button.



Provide a name to save the filter as, and click Save.



Viewing Saved Filters

To view a filter you've previously saved, click into the Title Menu



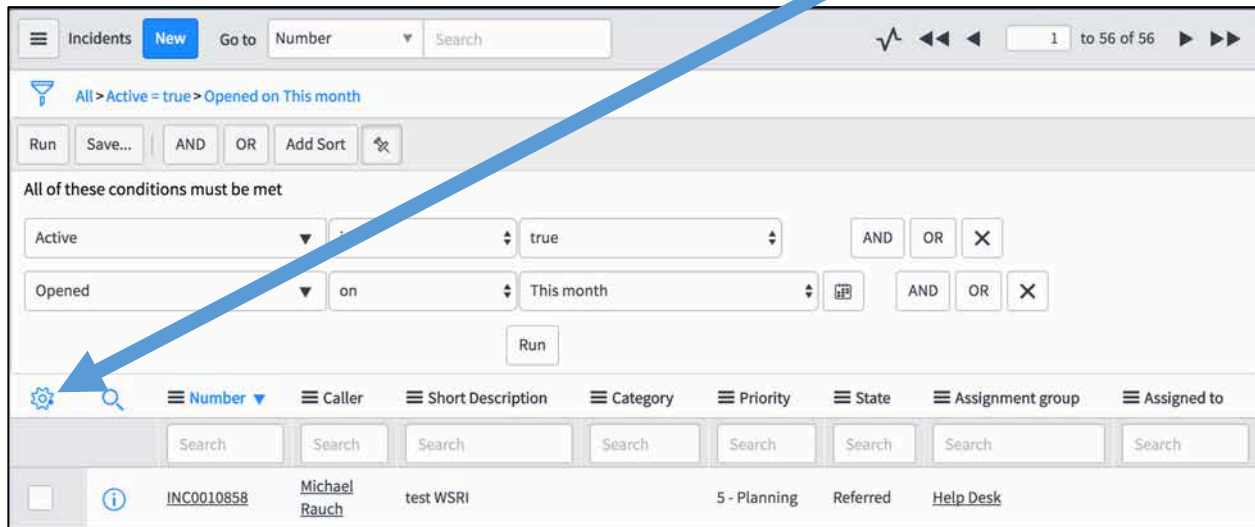
Select “Filters”, then the filter you wish to view.

Take a few minutes to familiarize yourself with creating filters.

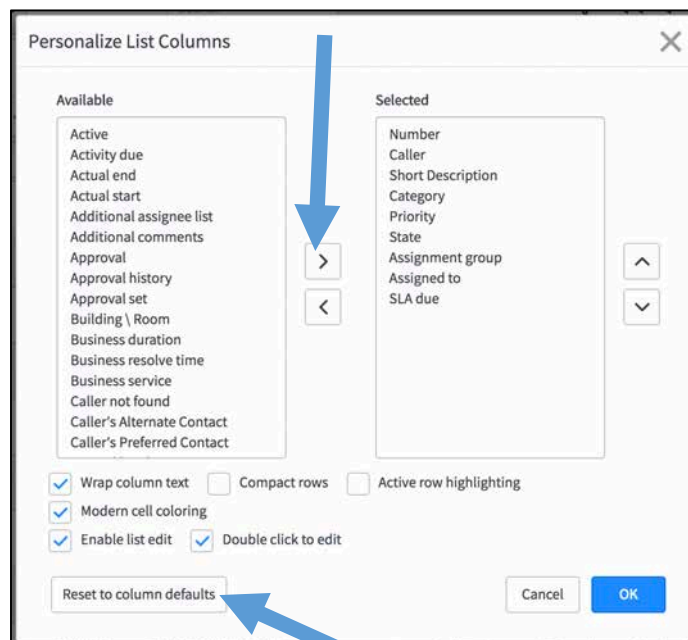
Customized Field Listing

Recall, in the previous section we created a filter by the date an Incident was Opened. Most likely, you did not see the Opened date in the listing of Incidents.

To edit the fields visible to you in a list, click the Personalized List gear



You will be presented with a listing of available fields to display on your list view. Using the list arrows, you can add and remove the fields you want to see on this list.



To reset the fields back to the system defaults, click the “Reset to column defaults”

Take a few minutes to familiarize yourself with customizing views

Creating and Viewing Reports

Viewing

Reports are located within the Reports application.

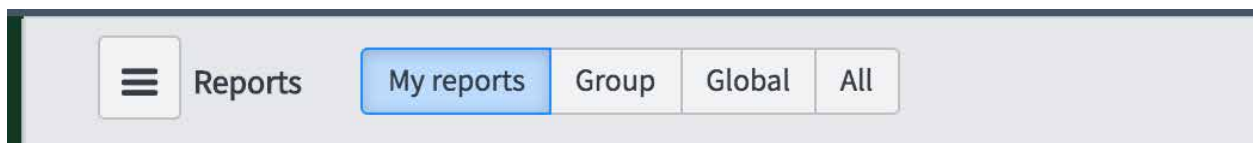
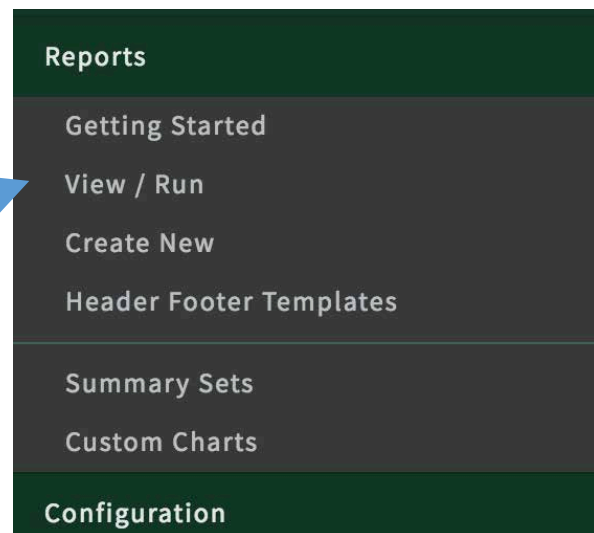
To view an existing report you've created, or one that was created globally and shared, click into the "View/Run" module.

Reports are organized into 4 categories:

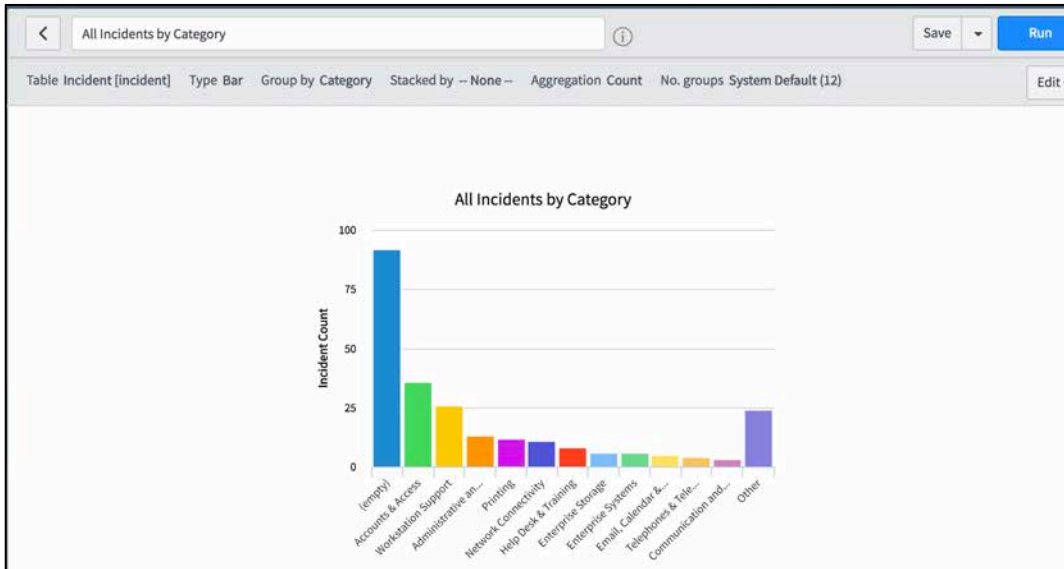
My Reports – reports you've created

Group – reports shared with groups of which you are a member

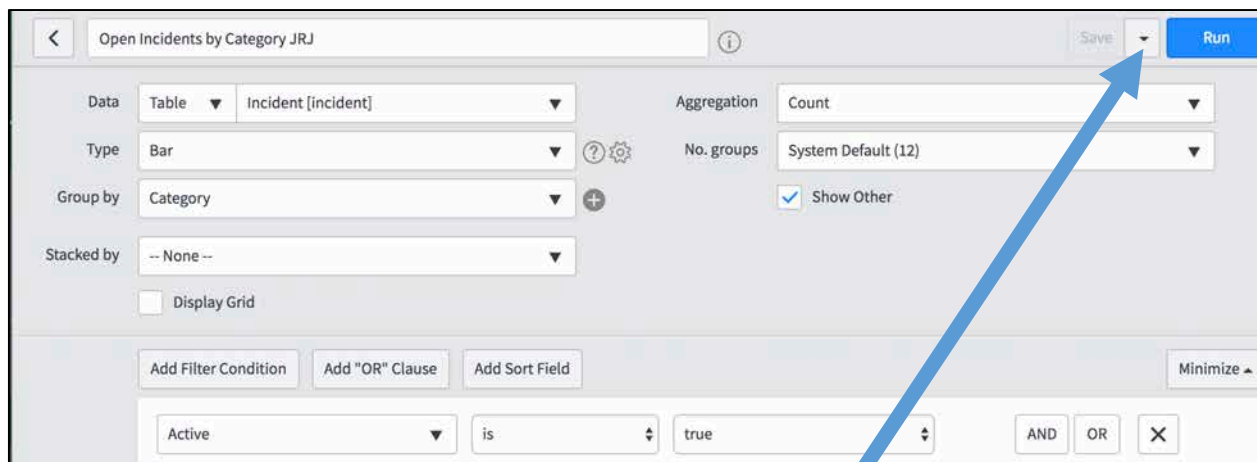
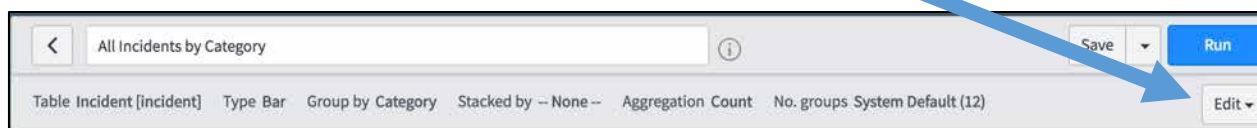
Global – reports shared globally



Selecting a report will present it to you on screen



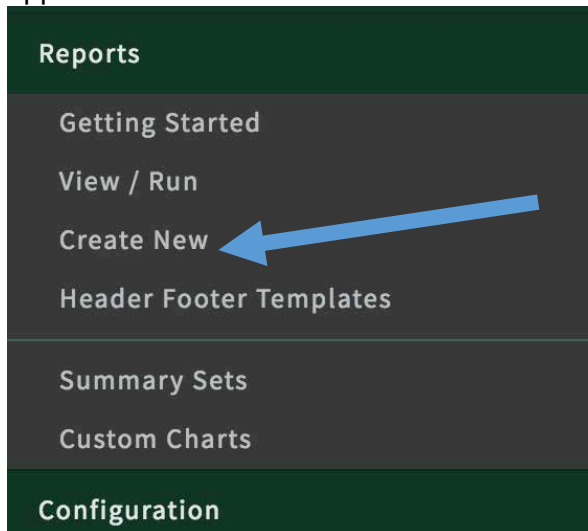
You can modify an existing report by expanding the Edit menu



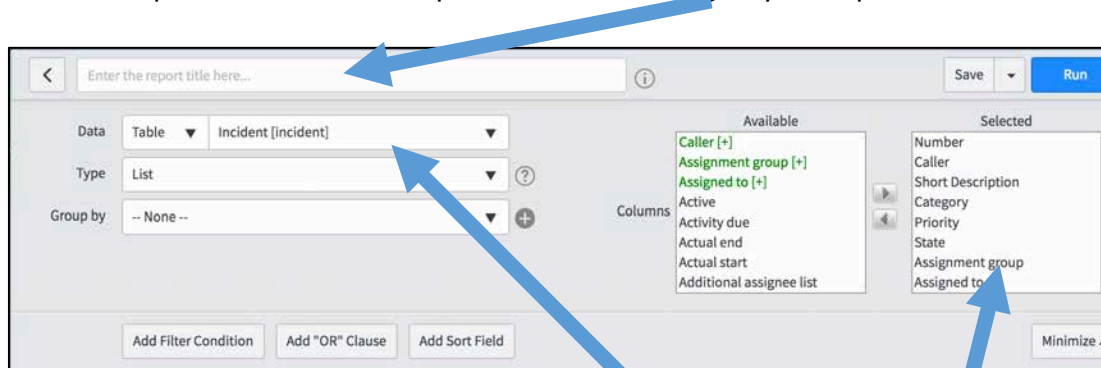
You can save your edits as your own report, by clicking the drop-down menu on the Save button.

Creating a New Report

To create a new report from scratch, click the “Create New” module within the Reports application.



You will be presented with the report editor. You can give your report a name



Next, you can select the table you’d like to report on, and select the field you’d like to see on your report. Commonly used tables are: Incident, Task, Request, & Request Item

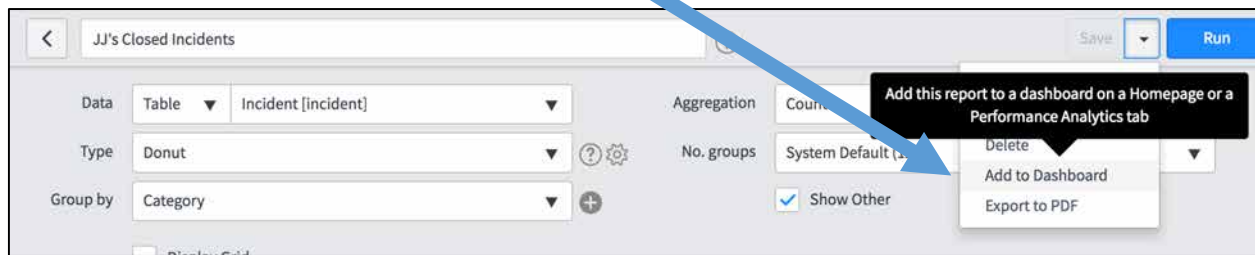
In the “Type” menu, you can select if you’d like your report to show a listing of records, or a visual graph such as: pie charts, bar graphs, etc.

You can add Filter conditions within the “Add Filter Condition” button.

Create a Listing report showing Incidents closed by Jonathan Jackson

Change your report to a Pie Chart, grouped by Category

If you save your report, you can add it to one of your Homepages by selecting “Add to Dashboard” in the save drop-down menu.



You will be presented with a screen to add the report to a Homepage in which you have access to edit.

Take a few moments to create, view and edit reports.

Preparing to Go-Live

- We are not performing a data migration from HEAT to ServiceNow.
- On August 2, we will disable the ability to create new tickets in HEAT; however, you will still have access to update tickets.
- Please try to have as many tickets as possible closed in HEAT prior to August 2.
- For tickets logged in HEAT that may persist longer than a few days/weeks, please manually copy into ServiceNow. In the HEAT ticket, make note of the ServiceNow INC/REQ number.
 - Do not Close the HEAT ticket, change the status to “Pending”. (To prevent survey emails from sending)
 - Management will review HEAT tickets to ensure closure or transfer.
- Once we go-live, as you use ServiceNow and find issues or have enhancement requests, please use the “ServiceNow Enhancement and Defect Reporting” items in the Service Catalog.
- Feel free to reach out to Jonathan Jackson, Michael Rauch or Jojo Rike with any questions, concerns or for one-on-one training.

Questions?

Self-paced testing/training.

Appendix

Appendix A – Service Level Targets: Response and Resolution

Default Service Level Targets (SLTs)*

(Goal of all priorities is to achieve response and resolution time 95%)

Priority	Response	Resolution
1 - Critical	30 continuous minutes	4 continuous hours
2 - High	90 continuous minutes	1 continuous day
3 - Moderate	1 business day	3 business days
4 - Low	2 business days	5 business days
5 - Planning	2 business days	5 business days

Individual Classroom Incident Service Level Targets (SLTs)*

(Goal of all priorities is to achieve response and resolution time 95%)

Priority	Response	Resolution
3 - Moderate	10 business minutes	30 business minutes
4 - Low	60 business minutes	8 business hours
5 – Planning	4 business hours	8 business hours

Individual Workstation Virus/Malware Incident Service Level Targets (SLTs)*

(Goal of all priorities is to achieve response and resolution time 95%)

Priority	Response	Resolution
3 - Moderate	9 business hours (1 business day)	3 business days
4 - Low	13.5 business hours (1 ½ business days)	3 business days
5 - Planning	2 business days	5 business days

Due to the presence of sensitive data, Virus/Malware Incidents in the following departments will automatically receive a priority of 3, and Networking Services will be notified immediately to turn off network connectivity to the affected workstation: Business and Finance, Human Resources, Payroll.