Agenda

- Incident management
- Request fulfilment
- Tickets
- Templates
The Big Day

ServiceNow will replace Heat on July 14…
- Bastille day!

So you will start using it July 16…
- Orville Redenbacher’s birthday!
Logging on

**Training**
https://mcgillqa.service-now.com/
- McGill Username & Password

**Production**
https://mcgill.service-now.com/
- McGill Username & Password
Accepting differences

**Incidents are different from requests, and how-tos**
- Different information is needed, so the forms need to be different.

**The goal of Incident Management is**
- Restore service as quickly as possible when there is an unplanned interruption of service.
- Minimize the impact

**The goal of Request Fulfilment is**
- To provide a channel for users to request and receive standard services for which a pre-defined approval process is in place.
Why are these processes important?

**Incident Management and Request Fulfilment are I.T.**

- For many people, reporting an incident/ making a request is the only time they interact with McGill IT Services.
Workflow for calls to the Service Desk

- Log details
- Not an incident or a request? Resolve it as a ticket!
Incident Management

It wasn’t raining when Noah built the ark
How did we do that last time? Finding old incidents.

- Select fields
- Breadcrumbs show filter
- Drag to favourites to save
- Search field
  - wildcard = *
- Add filter

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McGill
Exercise 1: Find old incidents

1. Go to Incidents > All
2. Create a filter to find all incidents about myCourses
   Affected Service = “Learning Management (myCourses)”
3. Run the filter
Ways incidents are created

- Log details

Ticket

Create incident record

Incident

Web form
Incident submitted by client from web form.
Incident assigned to your team by Service Desk

Ticket

- Log details

Create incident record

Incident
Workflow for incidents assigned to your team

- Service Desk will have logged, classified & prioritized the incident.
- Service Desk may have investigated the incident.
  ➢ Available through the Activity log
Where do you find the incidents?

- My Work
- My Group’s Work
Find an incident assigned to you

1. Find an incident under **My Work**
   ➢ Number begins with **INC** for incidents

2. **Acknowledge.**

3. **Save.**
An incident has been assigned to your group

Assign to an individual
- Assign to anyone in your team, or claim it for yourself

Ready to work on it?
- Acknowledge it!

Review all fields
- Is this a duplicate? Is this NOT an incident?
  - Cancel Incident
- Not enough information?
  - Click MDS (Minimum Data Set)
- Assigned to the wrong team?
  - Click Misrouted, set Assignment group
Begin working on the incident

Review all fields

- **Title** and **Description** are key.
- Update any field that needs updating.

- **Priority**
  - Factor of **Impact** (how many are affected) and **Urgency** (how badly they are affected)
  - Understand the history from **Activity log**

- **Additional comments** = communication with client
- **Work notes** = log of troubleshooting steps
- Use filter to focus on what you want

- Attachments appear at top
Know your client

Information about the client

- VIPs will be indicated
- **Profile note** appears at top
- **Location** (based on profile - can be changed)
- **Incidents by Same Caller** listed at bottom of Incident form

![Incident form screenshot](image-url)
What isn’t working?

Affected service
- Enter Business Service. If one doesn’t exist, enter Application Service.
- Not sure which it is? Click icon to see the Business Service Map.

Configuration item
- Enter CI, Affected Service auto-populates.

Service that is directly consumed by the end user to do their work.

Add as affected CI

Changes, Incidents for this CI
Business service, other services, CIs

- Email (business service)
  - Enterprise email cloud services (application service)
  - Email services on premises (application service)
    - Office 365 (application)
    - Exchange (application)

Affected service
Affected CI
Tips: Generic CIs

The following Generic CIs are available

- Generic desktop computer
- Generic laptop computer
- Generic desk phone
- Generic mobile phone
- Generic tablet device
Communicating with the client

- Responsibility of the assignee, not the Service Desk.
- Messages posted in **Additional Comments** are emailed immediately to the client.
- Put incident **On Hold** if asking client for information needed to continue work.
  - Follow up on three consecutive business days.
  - Close incident only then if no reply.

Document your work

- Use **Work Notes** to document all troubleshooting steps in tickets. Someone else should be able to pick up the work where you left off by looking at the Work Notes.
Putting the incident on hold

- Click **On Hold** button.
- Select the **On hold reason**
  - Awaiting Caller (enter **Follow up** date)
  - Awaiting Change (enter **Change Request** number)
  - Awaiting Vendor
Resolving

**Required fields**

- Configuration item
- Close code
- Cause (required for certain close codes)
- Close notes (emailed to the client)

Click **Resolve Incident**

**Reopening an incident**

- Click Reopen Incident button (available for 4 days after resolution)
- Customer can send email with subject “Please re-open” to automatically reopen
Exercise 2: Resolve the incident assigned to you

1. In My Work, locate the incident assigned to you (Number begins with INC).
2. Go to the task, Acknowledge it.
3. Enter the required information.
4. Click Resolve Incident.
Creating an incident

- Any technical team that identifies an incident can create an Incident Record.
- Click **Create New** in the Incident Module.

**Required fields**

- **Affected User**
  - name/ email (use wildcard to find: *)
  - ID
- **Title**
- **Description**
- **Affected Service**
- **Assignment group**
- **Impact & Urgency**
When more than one group needs to work on the incident

Scenario 1: You have completed your work, another team needs to take on the next step

- Reassign the incident to that group.
  - Enter **Assignment group**.
  - Explain reason in **Work notes**.
  - Save.
When more than one group needs to work on the incident

Scenario 2: You need another team to help you while you continue to work on the incident

- Create an Incident Task.
  - Click Incident Tasks tab.
  - Click New.
  - Enter Description, Assignment group.
  - Save.

- All incident tasks must be closed before you can close the incident.

If you are assigned an incident task

- Find it in My Work/ My Group’s Work (ITASK)
- Set State to “Work in Progress”
- Click Close Task when work complete.
Incidents involving Information Security

If confidentiality/privacy is required
- Click **Restrict Incident**
- The record will be visible only to members of
  - The assignment group
  - Information Security

“Additional Impact” tab
Flag when the incident
- Incident impacted Confidentiality
- Incident impacted Integrity
- Incident impacted Availability
- Incident impacted Safety
When should we restrict an incident?

When it contains sensitive information that should not be available to those outside of the service working on it.

- Information regarding sensitive actions, e.g. disciplinary, or terminations.
- Details about an unpatched exploit affecting a system.
- Could negatively affect the reputation of those involved or of the institution.
Request fulfilment

Do you take requests?
Workflow for calls to the Service Desk

- Log details

Create request record

Request

- Request item
- Catalog task

(Acknowledge)
Other ways requests are created

Web form
Request submitted by client from web form.

Request
- Request item
- Catalog task

(Acknowledge)
A request is like a restaurant order; you are a specialty chef!

- The order can include a variety of items.
  - A customer wants a salad and a dessert with her spaghetti!
  - The spaghetti cook and the dessert chef are not the same people.
- You will be assigned one request item (the spaghetti), not the entire request.

A request item is made up of tasks

- When you acknowledge the request item, a task is automatically created, assigned to you.
- Work on your task, create and assign other tasks if needed.
- When all tasks are completed, communicate with the client and close your task. The request item will be closed automatically.
Requests, request items, catalog tasks

- Spaghetti
  - Cook noodles
  - Cook sauce

- Wine
  - Open the bottle!

Onboarding
- Access to Lenel
- Access to ServiceNow

Request a new WMS site
- Request a new WMS site

Request Item
Catalog Tasks
Service catalog

- Is used to support the delivery of IT services.
- Has information about all IT services, including deliverables, contact points, request process.
- Every request submitted through our web forms has an associated catalog item.
- The catalog item is associated with a fulfillment group.

Request for WMS site
Catalog item = “New WMS Site”
Fulfillment group = web team
Assignee of request item

- Is “owner” of the request.
- Responsible for contacting the client.
- Communication with client done on the request item record (not the task!)
Where do you find the request items?

- My Work
- My Group’s Work

- Work
  - My Work
  - My Pending Work
  - My Approvals
  - My Groups’ Work
A request item has been assigned to you

- Go to the Request Item, review and update the information.
- **Item** = catalog item (goods or services available in our service catalog)
- **Affected Service, CI**
- **Title, Description** may be pulled from service catalog
- “**Variables**” come from the client, web form.
- Assigned to the wrong team?
  - Click **Misrouted**, set **Assignment group**
- Acknowledge the request item.

A catalog task is created automatically

- Listed at bottom of the request item.
- Click it to go to the task and begin working.
Begin working on the task
- Automatically assigned to you.
- Set **State** = In Progress.
- **Work notes** document all steps taken. Someone else should be able to pick up the work where you left off by looking at the Work Notes.
- Create and assign other tasks, if needed (done on the request item).

Communicating with the client
- Must be done on the request item using **Additional comments**.

Closing the task
- Click **Close Task**.
Placing a catalog task on hold

“On Hold” is set on catalog task, not request item

- Set **State** to “On Hold”.
- Select **On hold reason**.
- Enter details in **Work notes**.
Closing a catalog task

Inform the customer

- You must do this on the request item!
- Use Additional comments.

Close the task

- Enter details in Work notes.
- Click Close Task.
Exercise 3: Fulfill the request assigned to you

1. In **My Work**, locate and go to the request item assigned to you (Number begins with RITM).

2. **Acknowledge** it.

3. Locate and go to the catalog task at the bottom of the page.

4. Set the **State** to “In Progress”.

5. **Save**.

6. Use **Additional Comments** on the request item to communicate with the customer.

7. **Close Task**.
   You will be returned to the request item. Find the task at the bottom of the page and verify it is closed.
When more than one group needs to work on the request

Creating a catalog task

- Locate the “Catalog Tasks” list at the bottom of the request item.
- Click **New**.
- Enter a **Title**, **Description**, **Assignment group**.
- **Save**.
Why create a request?

- If an incident was assigned to you and you discover it is really a request.
Exercise 4: Create a request using the catalog

1. Go to the **Catalog** in the navbar.
2. Click on the **Category** and then the **Catalog Item**.
3. Enter **Title, Details** of the item.
4. Click **Order Now**.
5. Click on the request item.
6. In **Requested for**, enter the *customer’s* name.
7. Enter the **Affected Service**.
8. **Save**.

**Key point!**
How-tos, inquiries

How do you do?
How-to tickets

- Log details
You might be assigned tickets by the Service Desk
- Found in My Work/ My Group’s Work (TKT)

What type of tickets?
- How-to
- General inquiry
- Complaint
- Compliment

1. Assign the ticket if it is unassigned.
2. Use **Additional Comments** to communicate with client.
3. **Close Ticket.**
Automatically fills in fields
- Available for both Incident Management and Request Fulfilment

Create template
1. Click Toggle Template Bar
2. Click “Add Template” icon
3. Fill in template
4. Save

Use template
1. Click Toggle Template Bar
2. Click on the name of the template
Practice!
- QA environment is available to you.

Change agent
- Knows everything there is to know.

Knowledge base
- Articles will be in ServiceNow