UTSA Technology Solutions

UTSA ServiceNow User Guide

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Built on materials provided by Lisa Springer with InSource.

Welcome to the UTSA ServiceNow (SNOW) User Reference Guide.

This guide is a compilation of all UTSA SNOW training materials for your quick and easy access. **Simply click any section to skip to that area of the guide.** For questions or concerns related to ServiceNow, please contact the Tech Café at 210-458-5555 or techcafe@utsa.edu.

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SERVICE PORTAL

The SNOW Service Portal, accessible here, is used to access the following:

- Knowledge Articles
- Catalog Requests
- Requests submitted by the user
- Organization-wide notifications

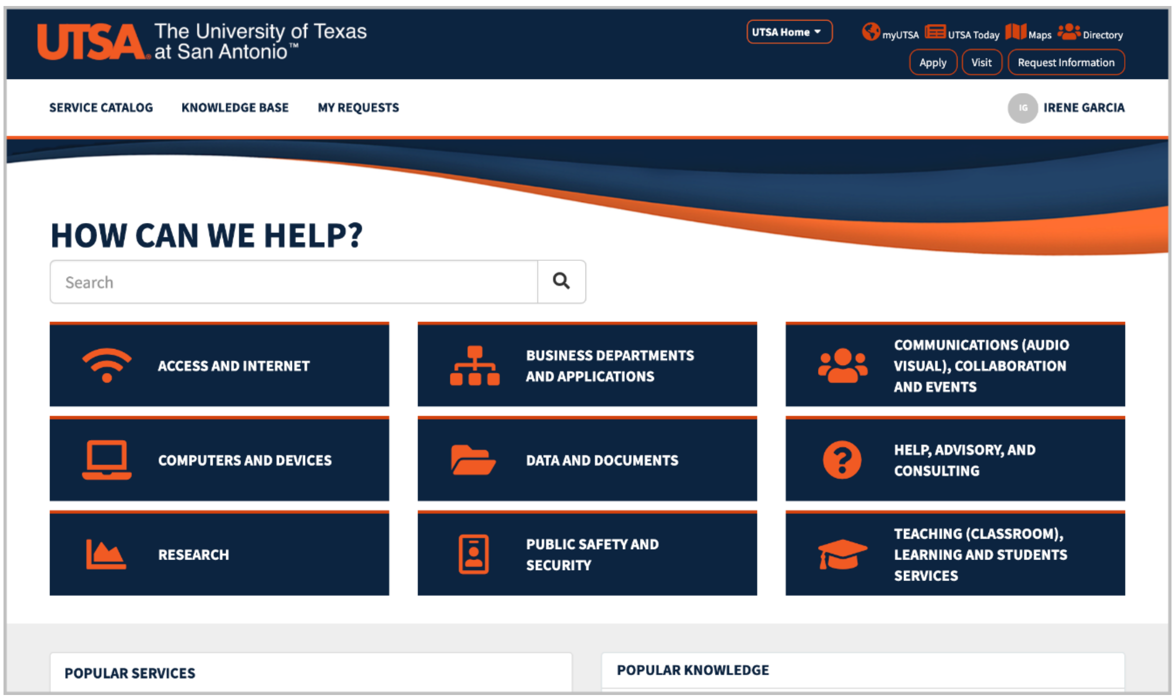


Figure 1. SNOW Portal Screenshot

SNOW SEARCH ENGINE

The field under “How Can We Help?” is the SNOW global search engine. You can use this search engine to search for **Knowledge Articles** and **Catalog Request** items.

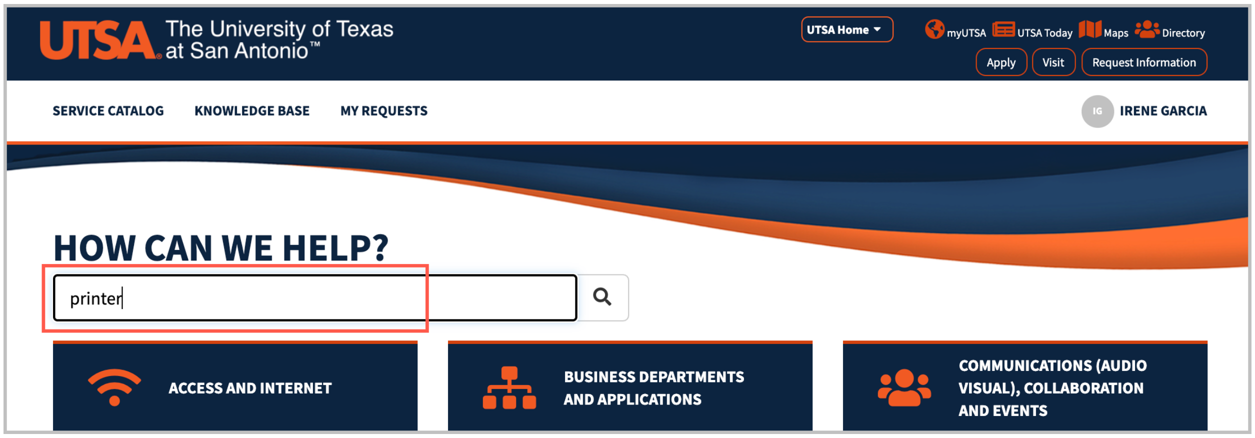


Figure 2: Search Engine

Search Results will bring up both **Knowledge Articles** and **Catalog Request** items. See below to learn how to search for only one category or the other.

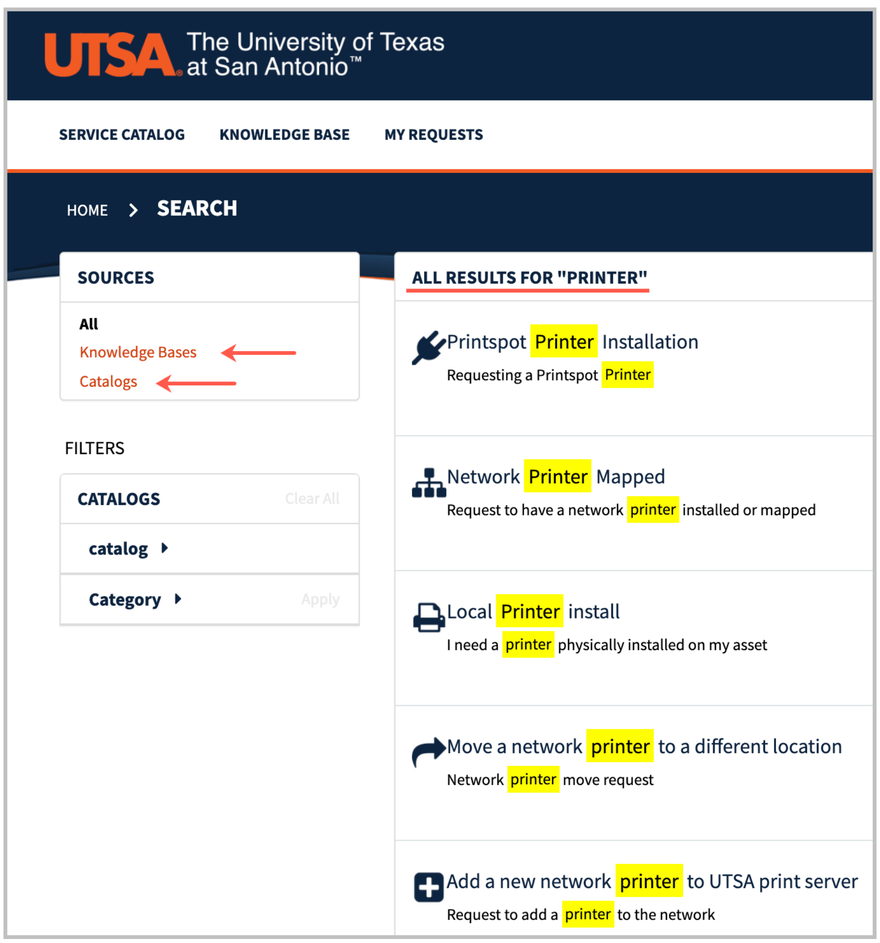


Figure 3: Search Results Example

To search for only **Knowledge Articles**, go directly to the Knowledge homepage by clicking **Knowledge Base**. The **Knowledge Base(s)** contain articles that provide users with information such as self-help, troubleshooting, and task resolution. Use the search engine or navigate by **Knowledge Base** and **Category** to search for **Knowledge Articles**.

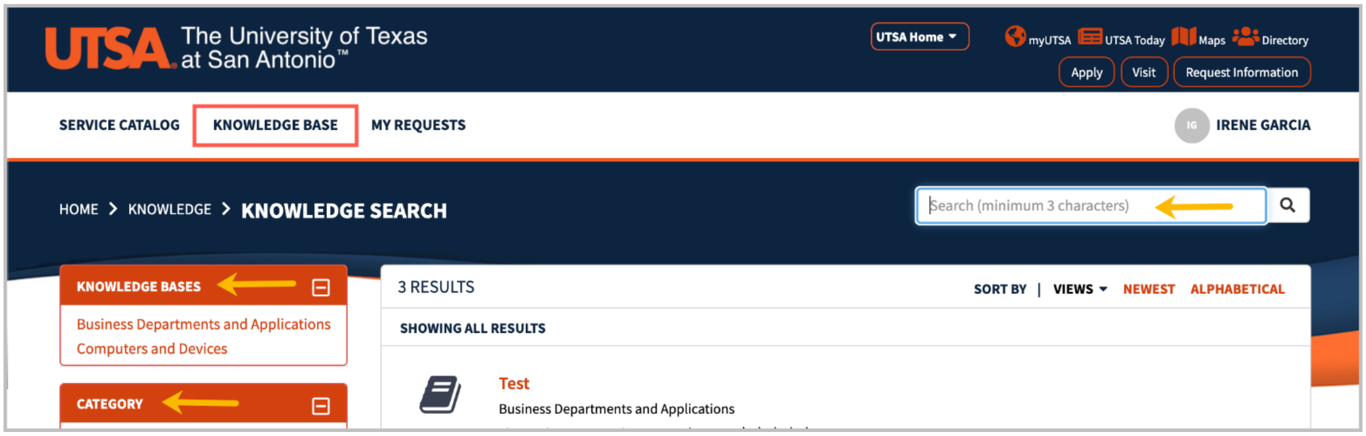


Figure 4: Knowledge Base Search

To search for only **Service Catalog Request Items**, go directly to the **Service Catalog**. The **Service Catalog** contains all active/available service offerings.

Figure 5: Service Catalog Link

SERVICE CATALOG

A **Service Catalog** is a customer-facing view of available services and products offered by departments within an organization. It provides:

- Self-service opportunities for customers within a single interface
- Standardization of approach and delivery of request fulfillment across an organization
- Management of customer expectations through self-service training of individual requests
- Behavioral shifts of customers; from relying on emails and phone calls to accessing catalogs to serve their own needs

Navigation:

Click a UTSA catalog to expand it to view the different categories for that catalog. Click a category to open the different request options.

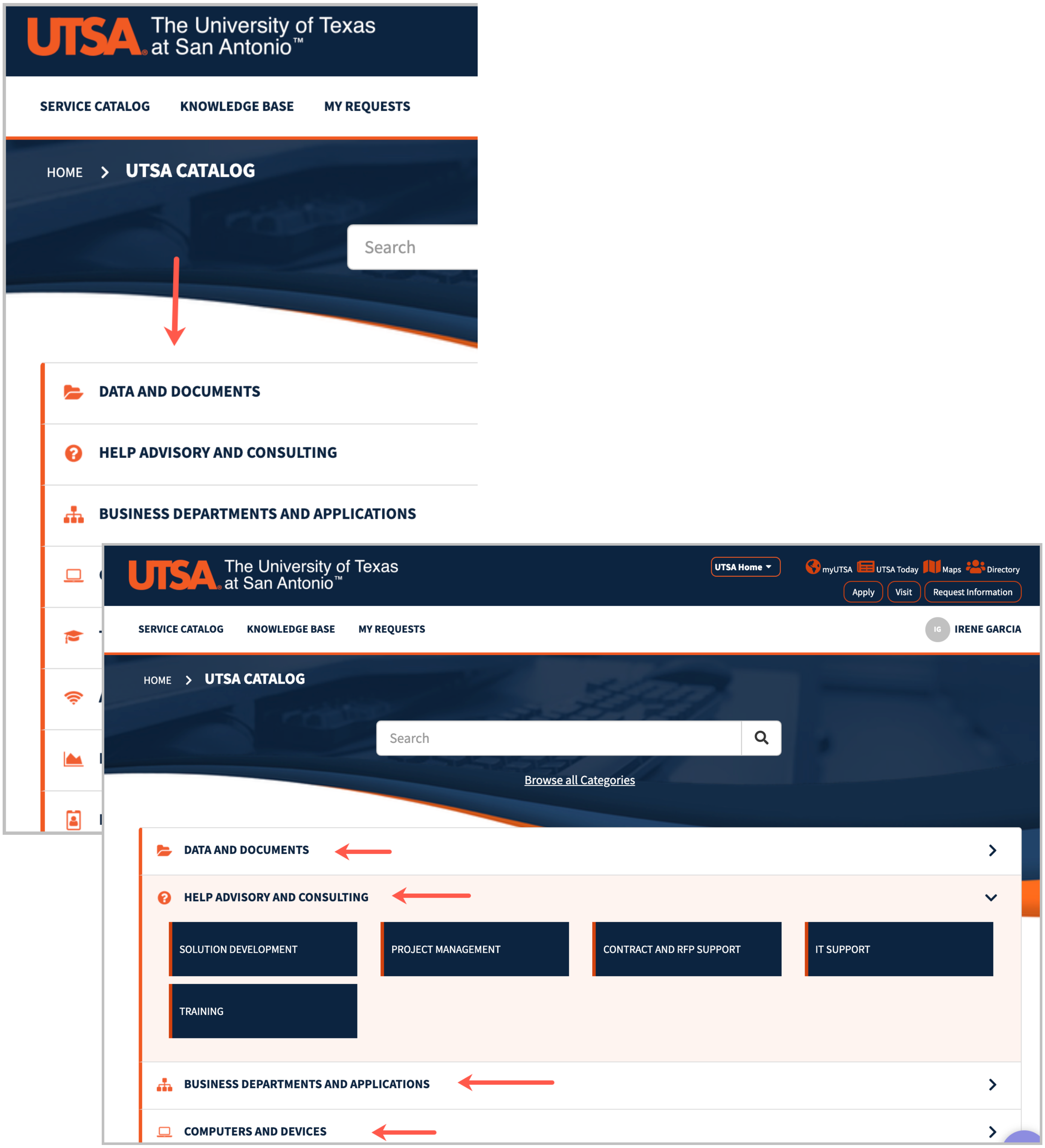


Figure 6: Service Catalog Options

Click a request to open the catalog item request form.

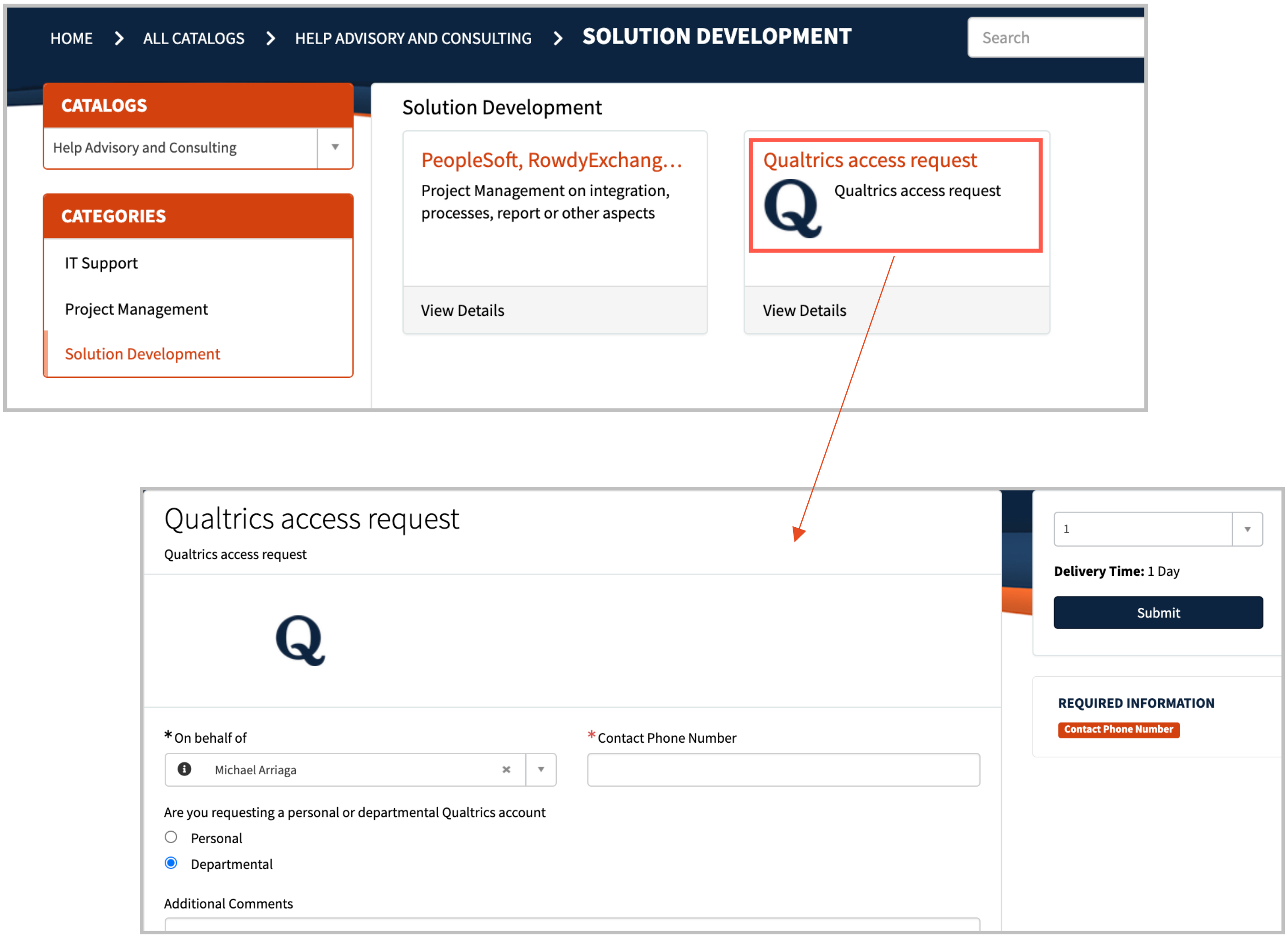


Figure 7: Catalog Item Request Form Example

Another way to search for Catalog Items is by clicking Browse all Categories under the Search field.

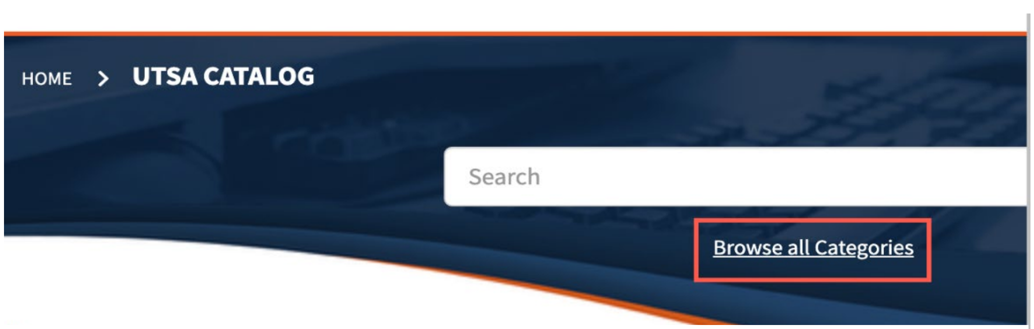


Figure 8: Browse all Categories

Browse by Category along the left side of the page until you find the request form. Click + to expand the category options.

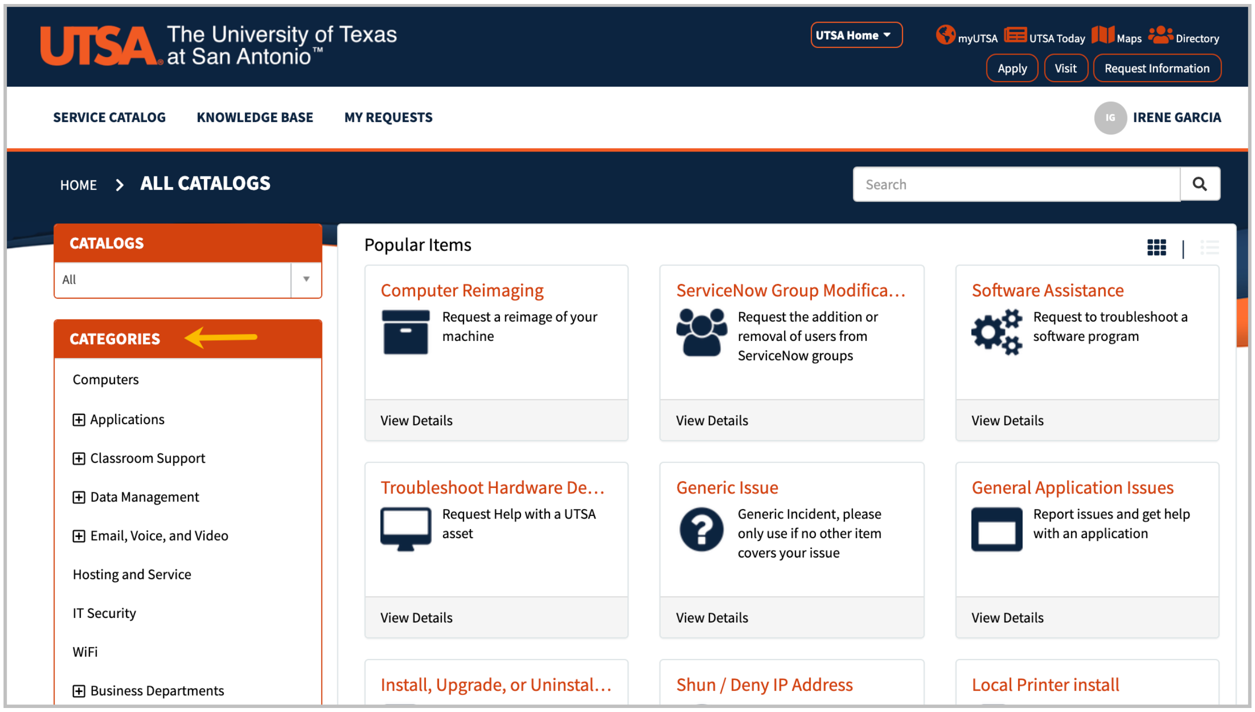


Figure 9: Browse by Category list

SUBMIT A REQUEST FROM THE CATALOG

After locating the request, open a request, fill out the form and click **Submit**.

Notes:

- Red asterisk fields on the request forms are mandatory.
- Anyone can submit a request on behalf of someone else
- Users can add attachments to a request via the paperclip at the bottom of the form

If a user cannot find a **Request** matching their issue, they can create an incident using the **Generic Issue** request under “IT Support.”

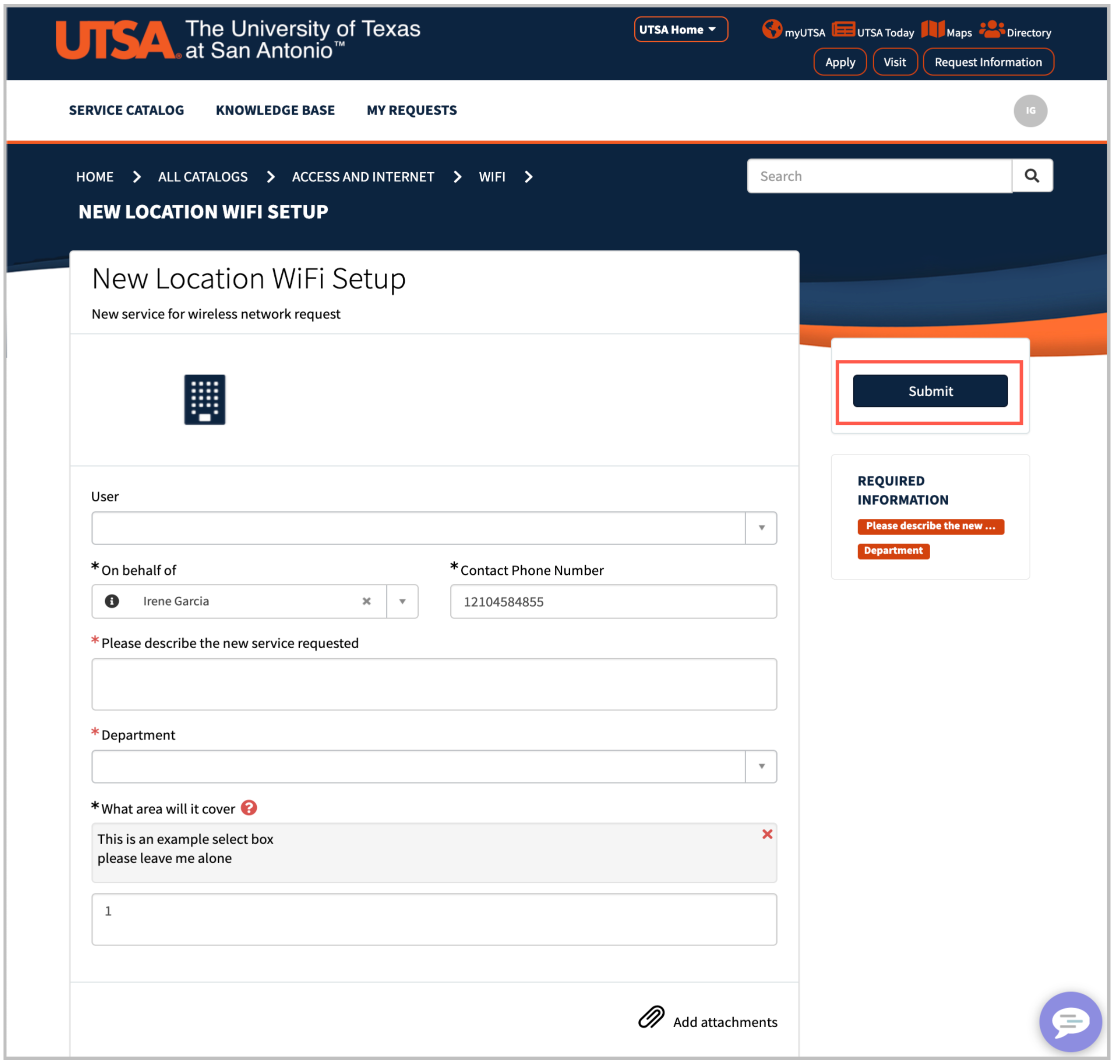


Figure 10: Service Catalog Request Form Example

Once the request is submitted, a confirmation of the request is provided including the **Request Number**.

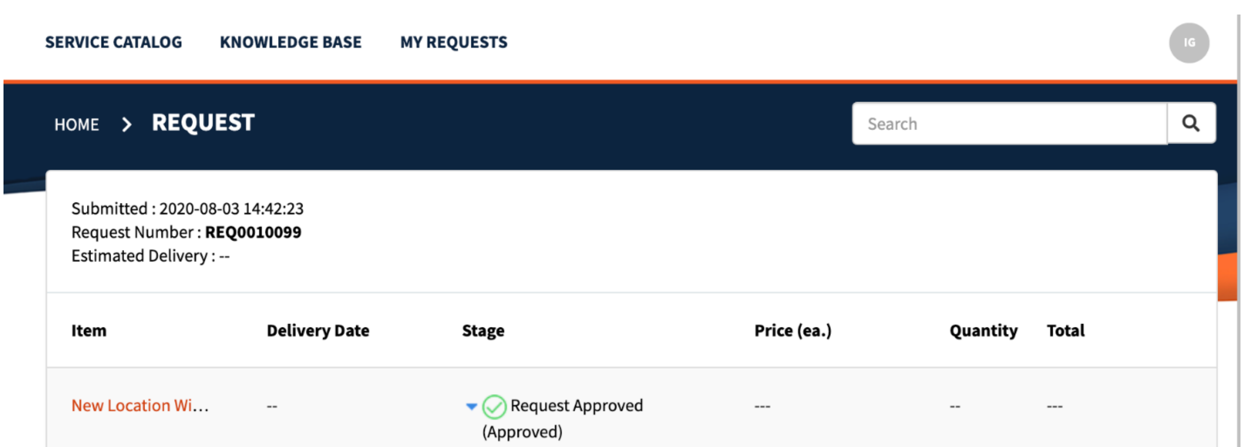


Figure 11: Sample Request Submission

ACESSING REQUESTS FROM THE PORTAL HOMEPAGE

At any point in time, a user can view all their requests by clicking **My Requests**.

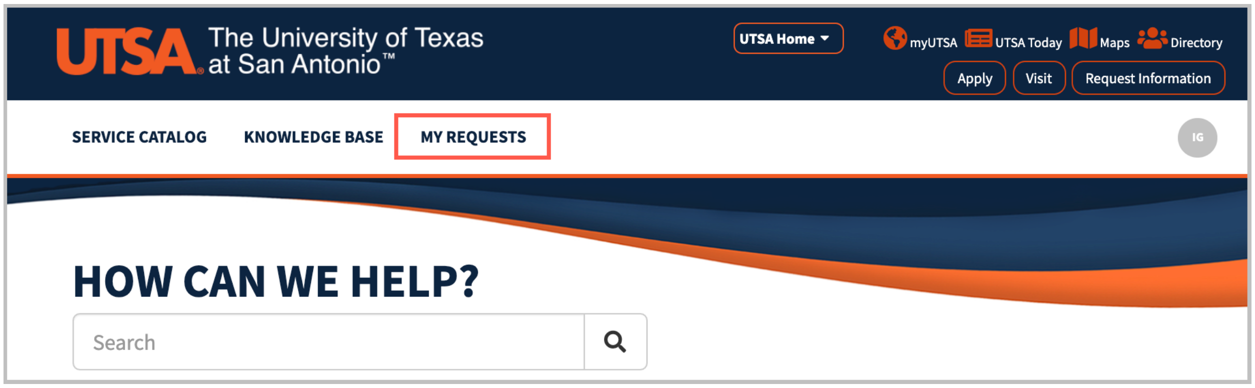


Figure 12: My Requests

All currently opened requests will be displayed. To access past/ closed requests, click the caret in the View field to toggle between Open and Closed.

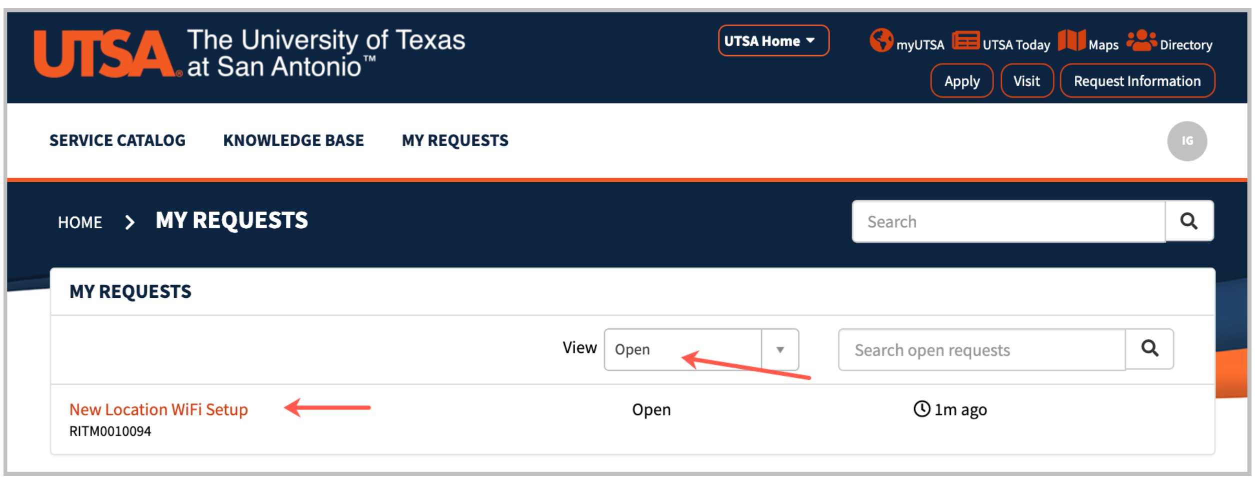


Figure 13: View Requests (Open & Closed)

The **requestor/user** can open any request at any time to check the status of the request or communicate with the **fulfiller.**

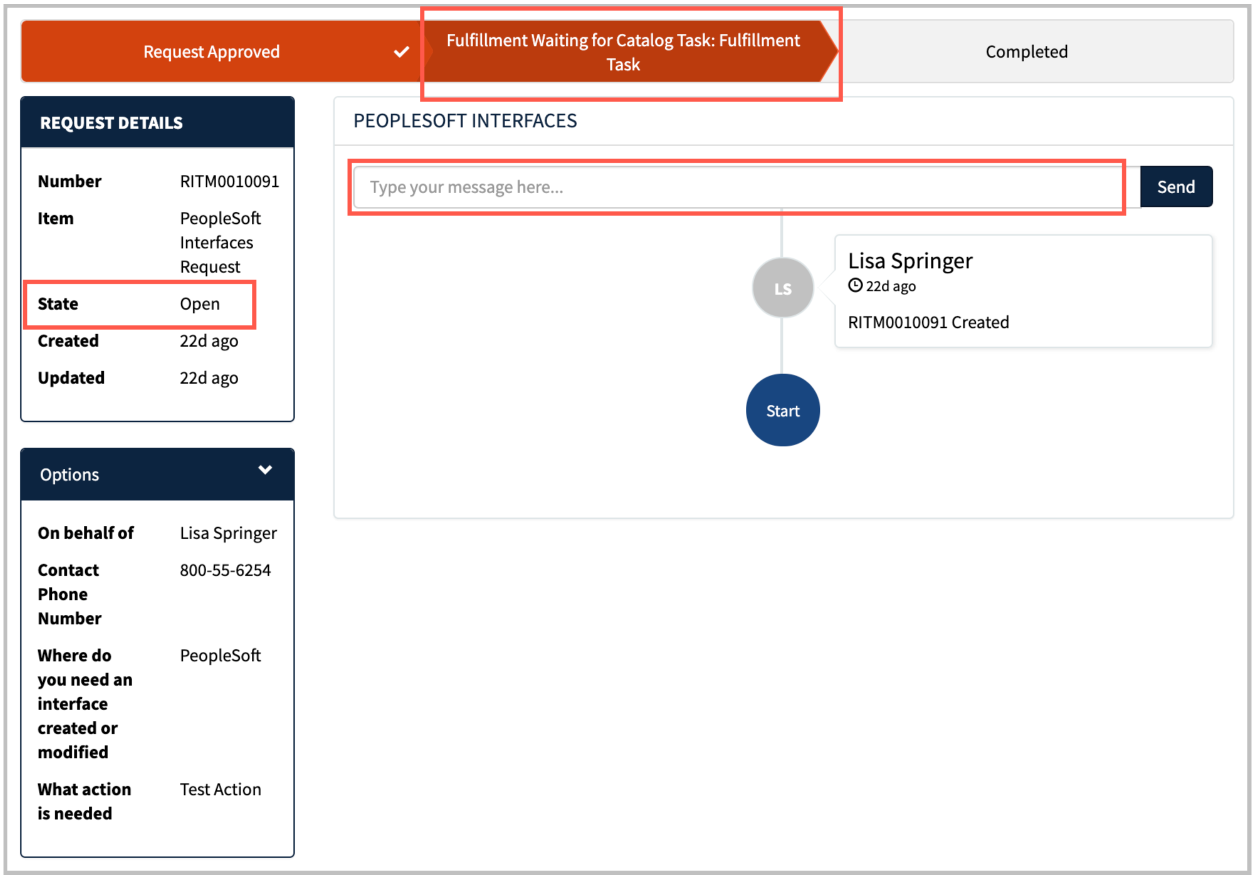


Figure 14: Request Status

SUBMITTING A REQUEST FROM THE FRAMESET

ITIL Fulfillers have access to both the end-user Service Portal, and the internal frameset of catalog request items. You may choose to use the frameset method if you are creating a request for yourself or you are assisting someone else.

Below is an example of a frameset: The **Access and Internet** Catalog

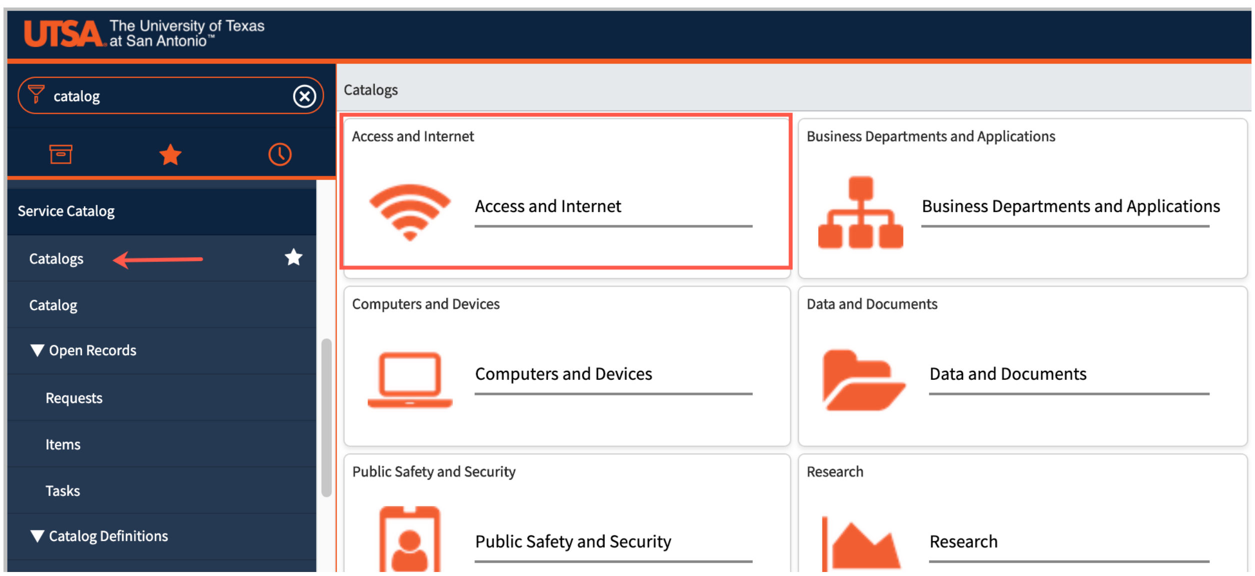


Figure 15: Request from Frameset

CATALOG REQUESTS, ITEMS, AND TASKS

Catalog Request Process:

Catalog Request Forms are used so **Requesters** know what they are requesting and can answer questions about their request, and **Fulfillers** know what to fulfill.

- Each "order" creates one **Request**
- Each **Request** can contain multiple **Catalog Items**
- Each **Catalog Item** can spawn one or more fulfillment **Tasks**

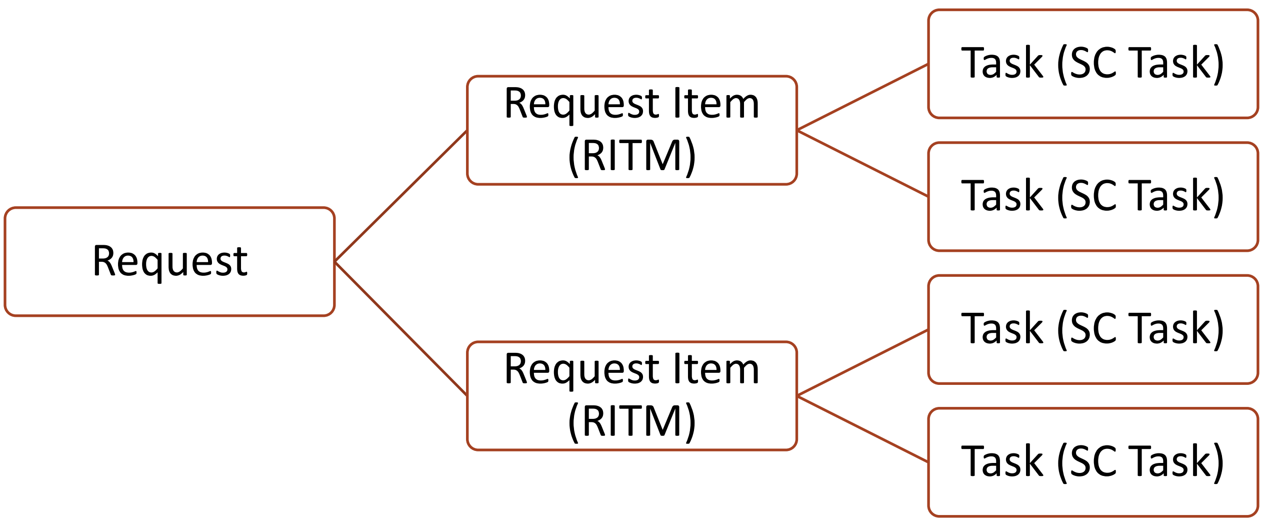


Figure 16: Request Process

Catalog Item Record and Workflow:

Below is an example of the **Catalog Item Record** and **Workflow.** This diagram is presented only for understanding; *ITIL fulfillers will not be creating catalog items personally.*

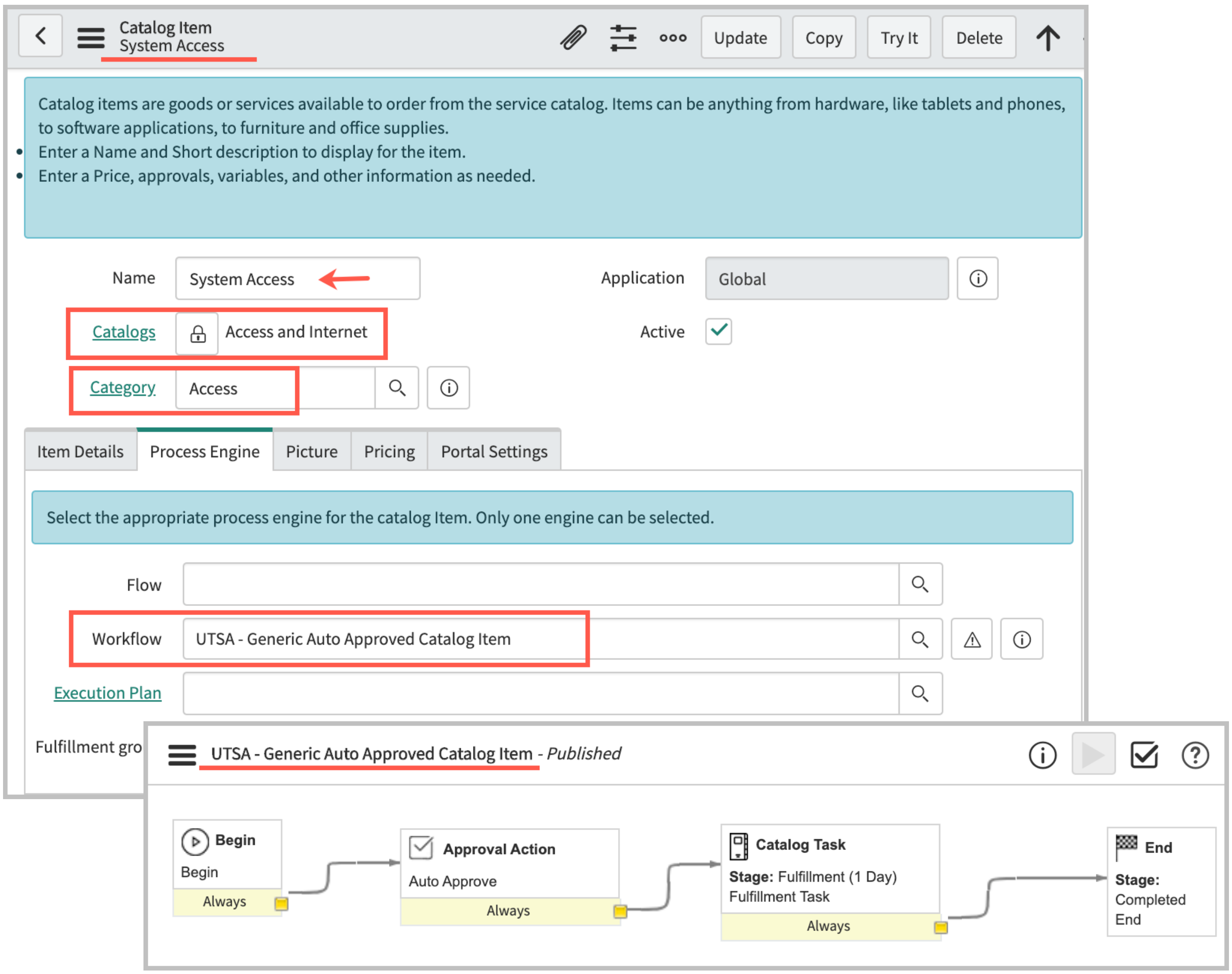


Figure 17: Catalog Item Record/Workflow Diagram

ORDERING AN ITEM FROM THE CATALOG

Catalog Items are always tied to a **workflow**. That is the main value/benefit of **Request Management** (placing an order from a Catalog)—the fact that its process is automated.

Once a **Request** has been submitted, there is no need to follow up on what to do next.

The first task or approval will show up in the **Assignment Group's** "in-box" (i.e. **My Groups Work**. A notification is also sent out to the **approver(s)** and the **Assignment Group** members to whom the task is assigned.

When **catalog items** are created, they are assigned to a **catalog** and assigned to a **category**. A **workflow** will always be attached to **the catalog item record**.

Below are the categories in the **Access and Internet** Catalog. Inside each category are the catalog items, also called **requests**.

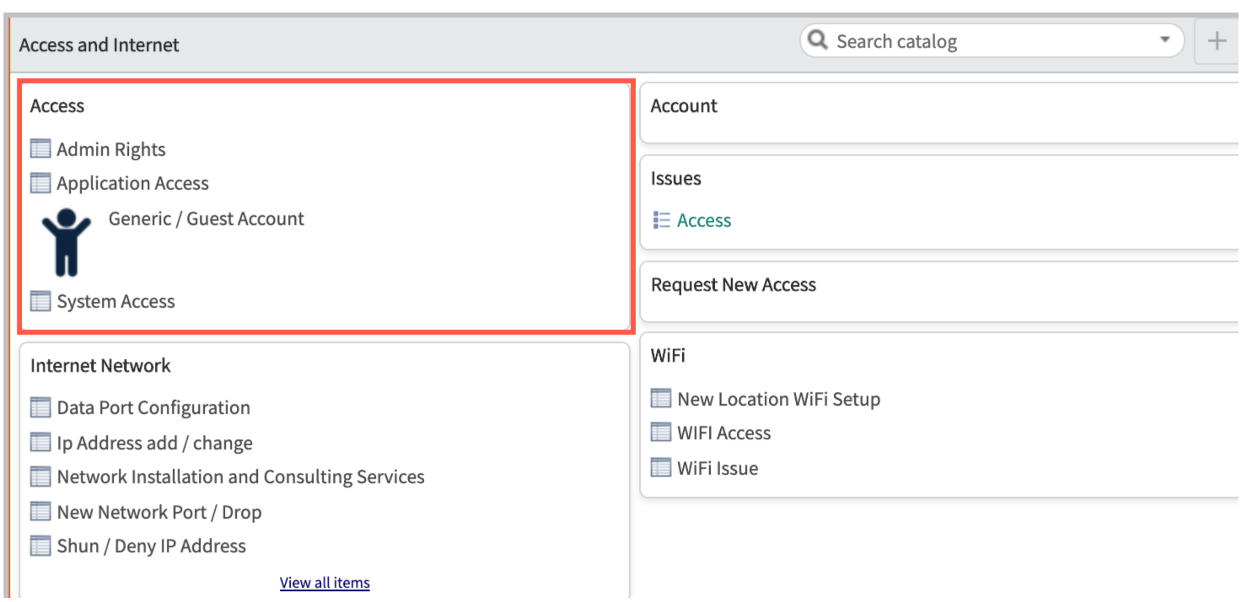


Figure 18: Access and Internet

Select the System Access request to open the request form, fill out the form including all mandatory fields and click **Order Now**.

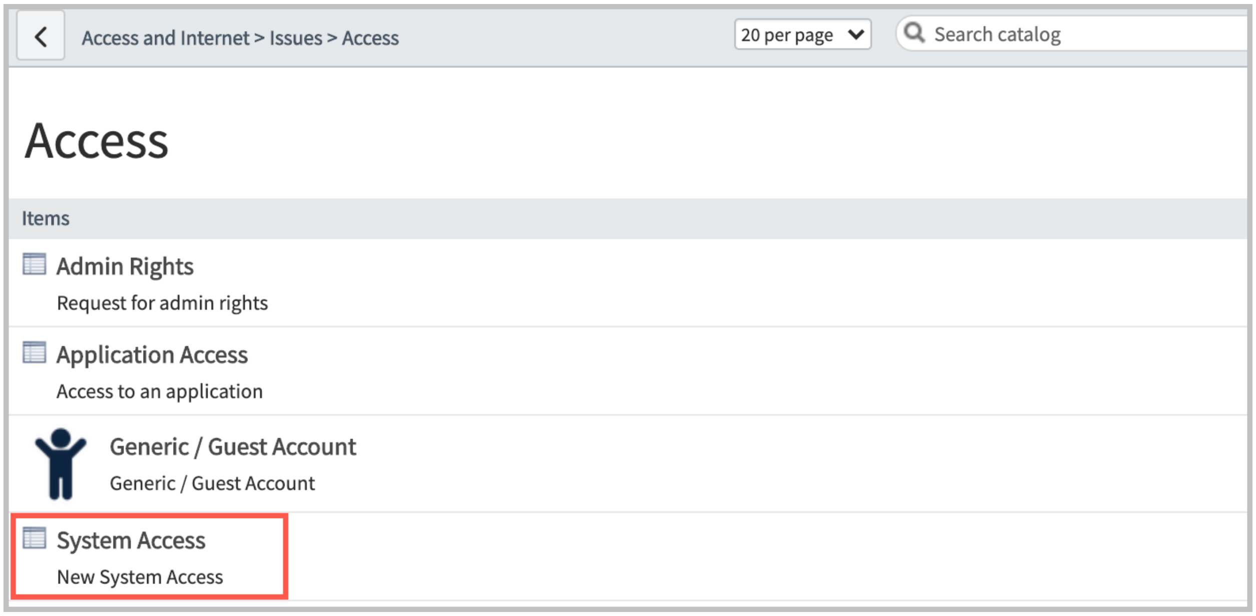


Figure 20: Access Request

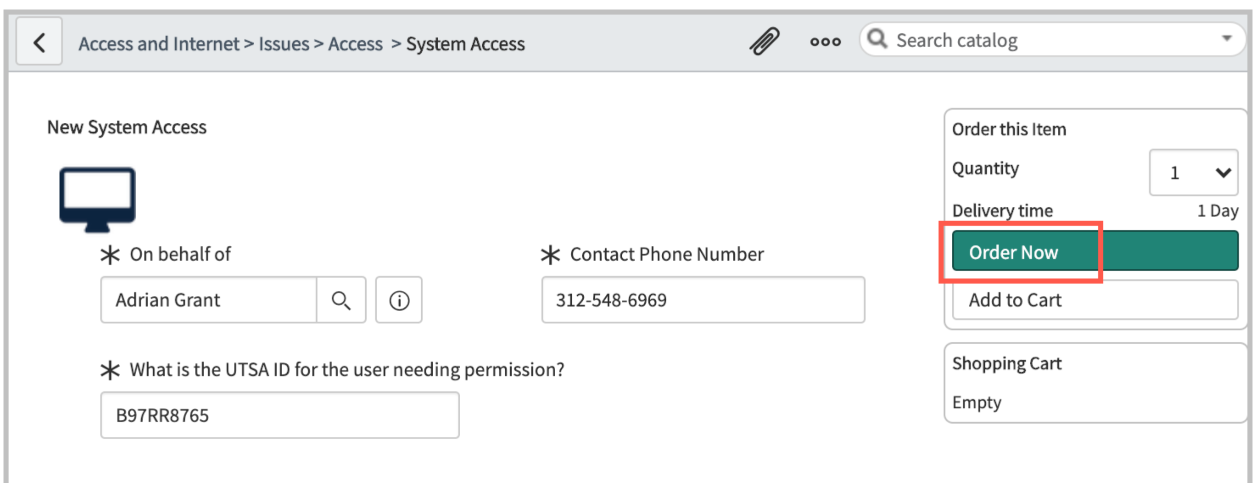


Figure 19: Access Request Form

Once submitted, the user can view confirmation of the request.

Click the triangle to open the Stages to see the status or progress of the request.

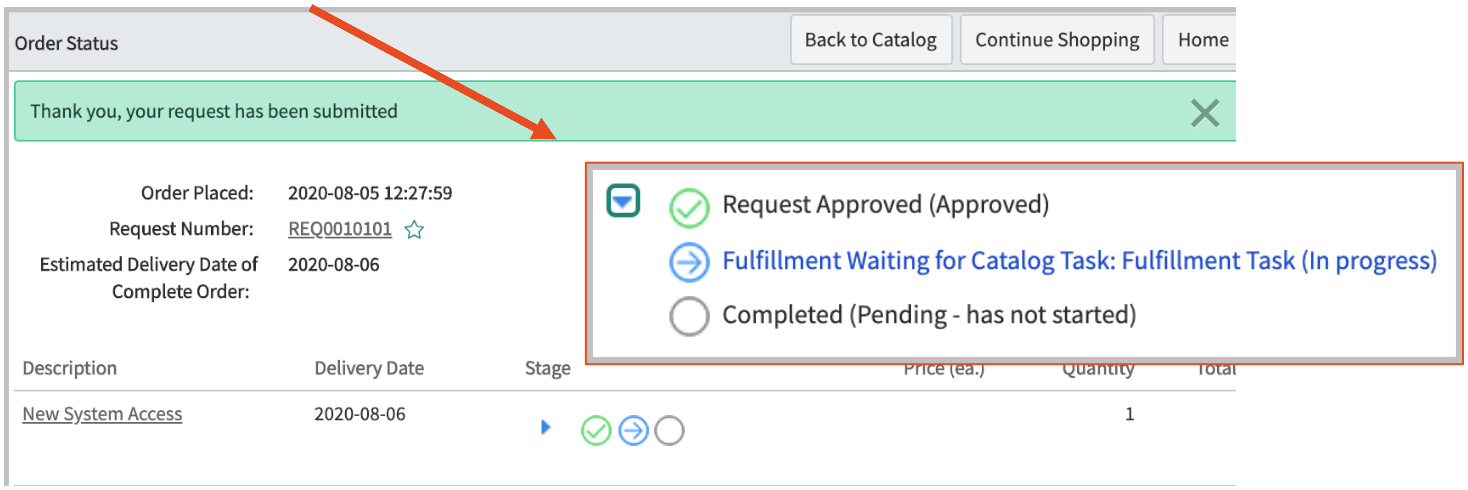


Figure 21: Request Confirmation

Who can access:

The Fulfiller and *On-behalf-of* can both access the requested item via the **Portal > My Requests**.

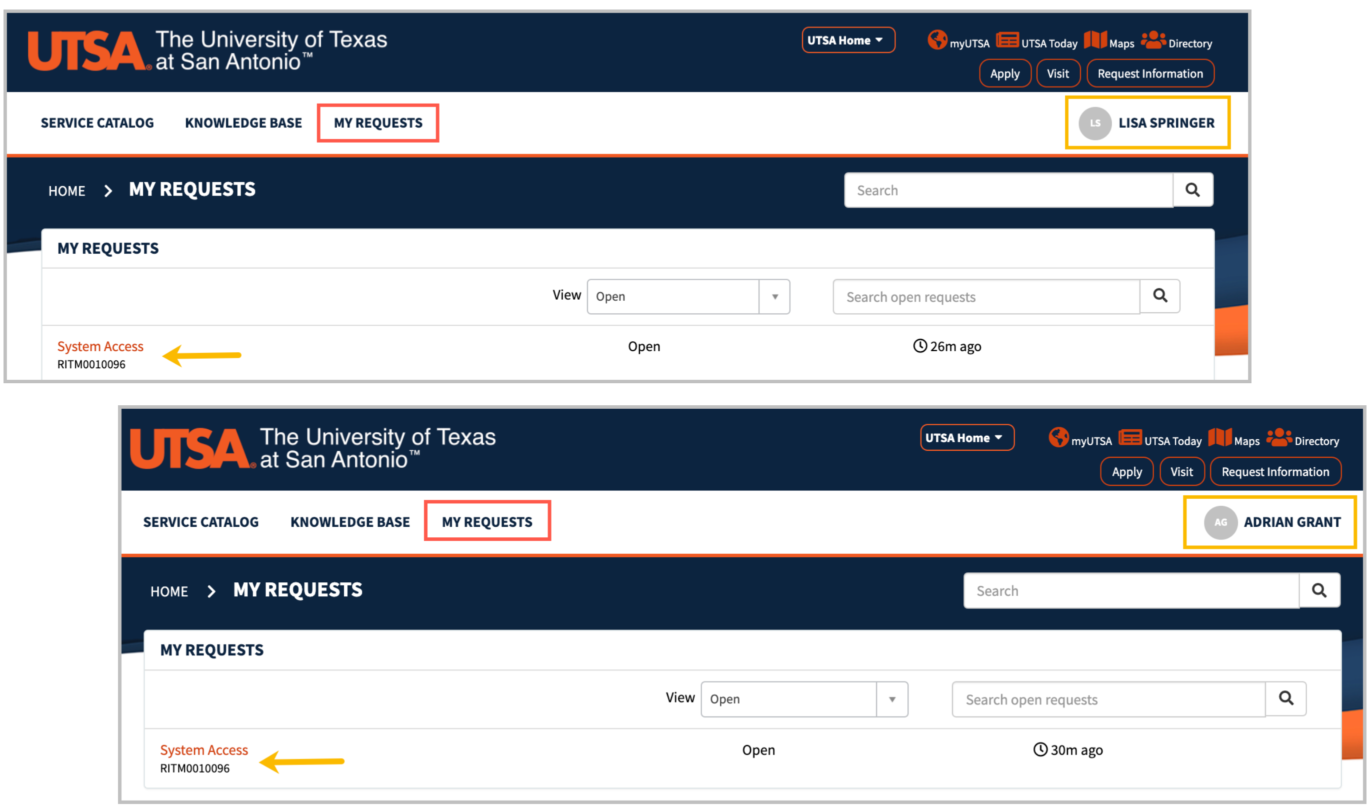


Figure 22: My Requests View

FULFILLING THE REQUEST

The Service Catalog Task (**SCTask**) will show up in **My Groups Work** for those in the group that the **SCTask** is automatically assigned to by the workflow.

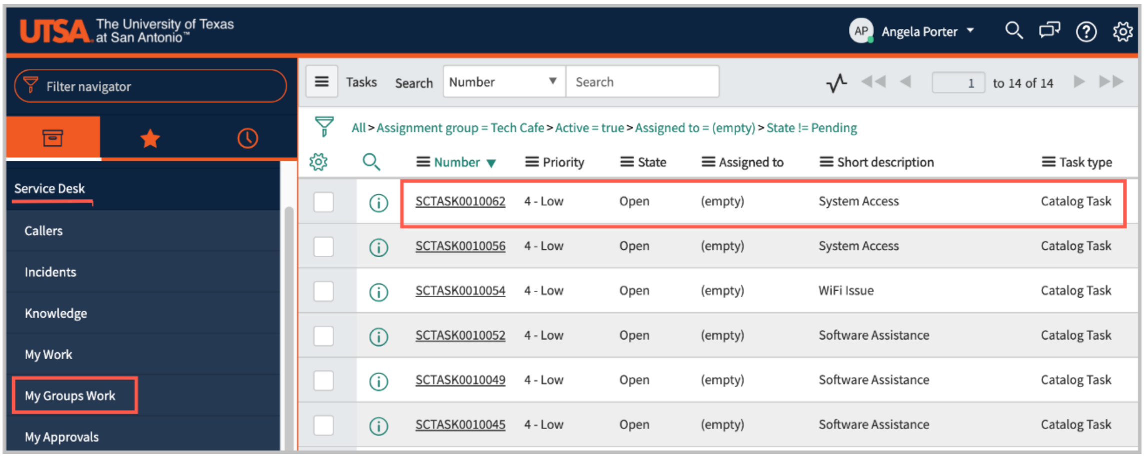


Figure 23: My Groups Work

Someone from the Assignment Group will open the **SCTask**, work the task and close the task.

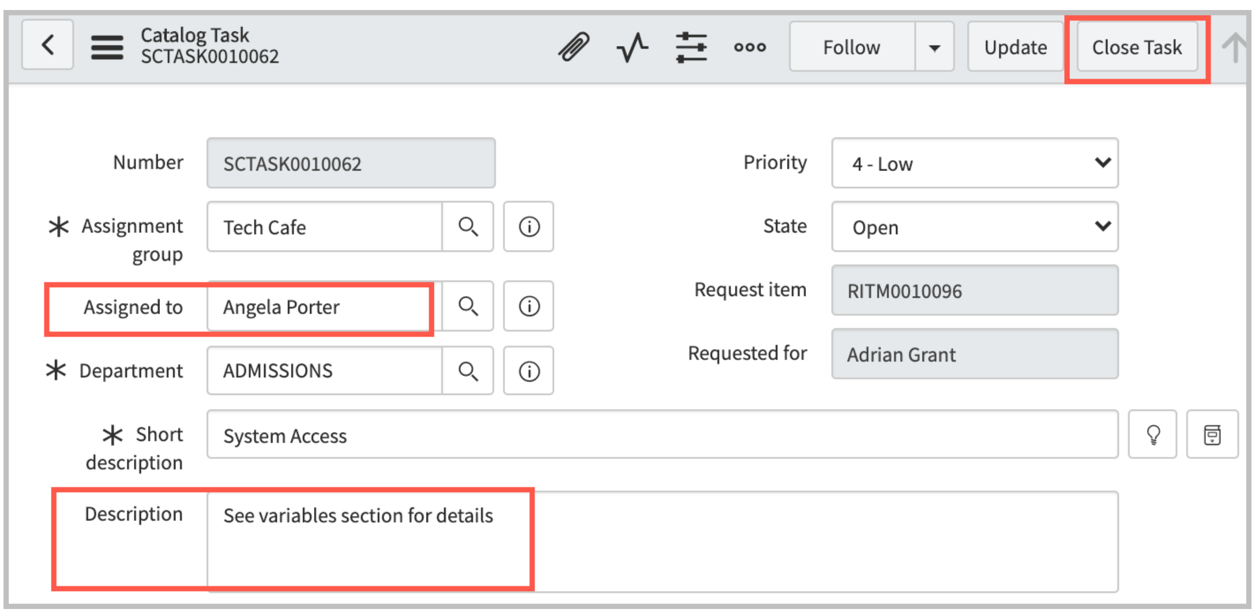


Figure 24: Work and Close the Task

When the final task of any Requested Item is closed, it will automatically close the **Requested Item** (**RITM**) and the **Request**.

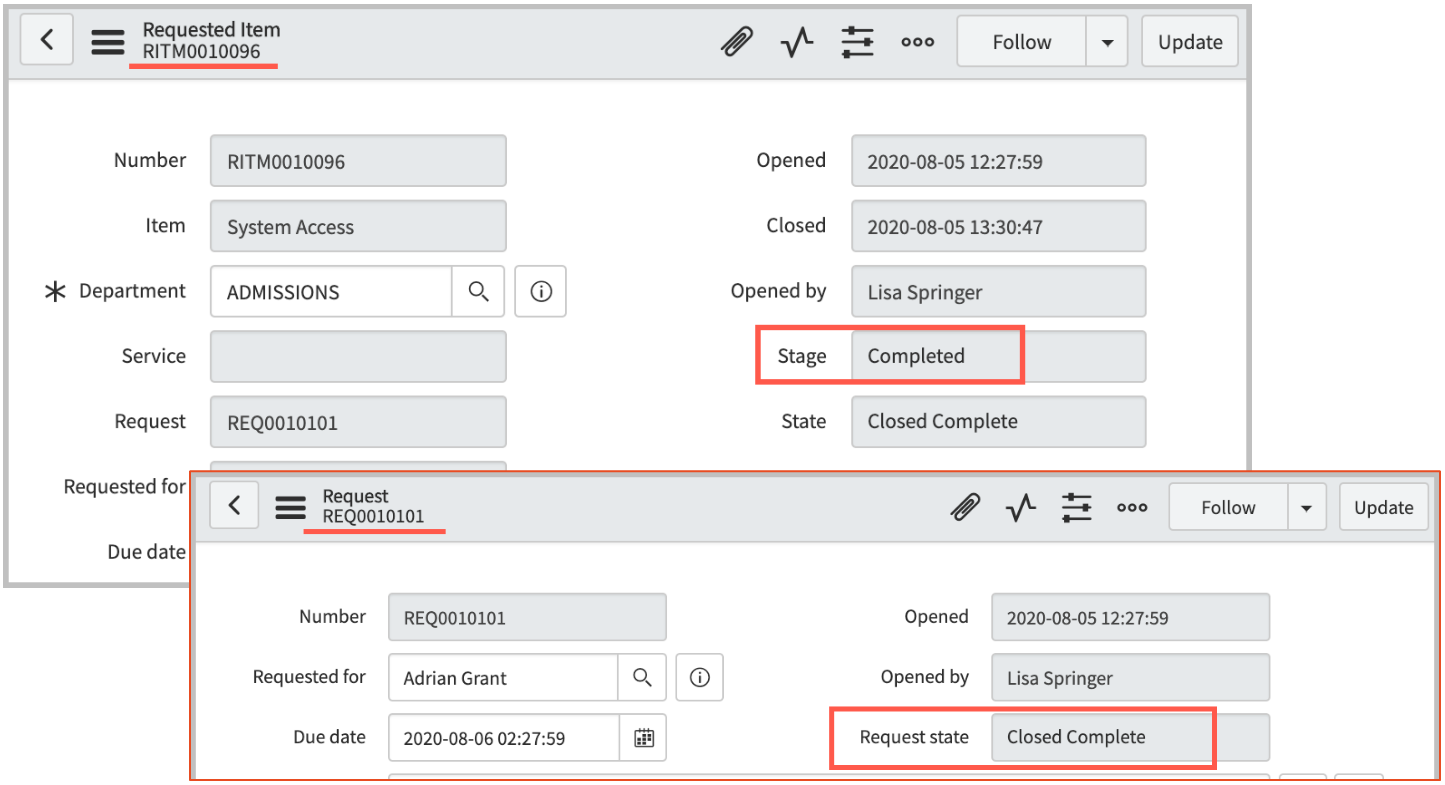


Figure 25: Request Closed

My Work and My Groups Work

This is where to find and manage your work from the Frameset.

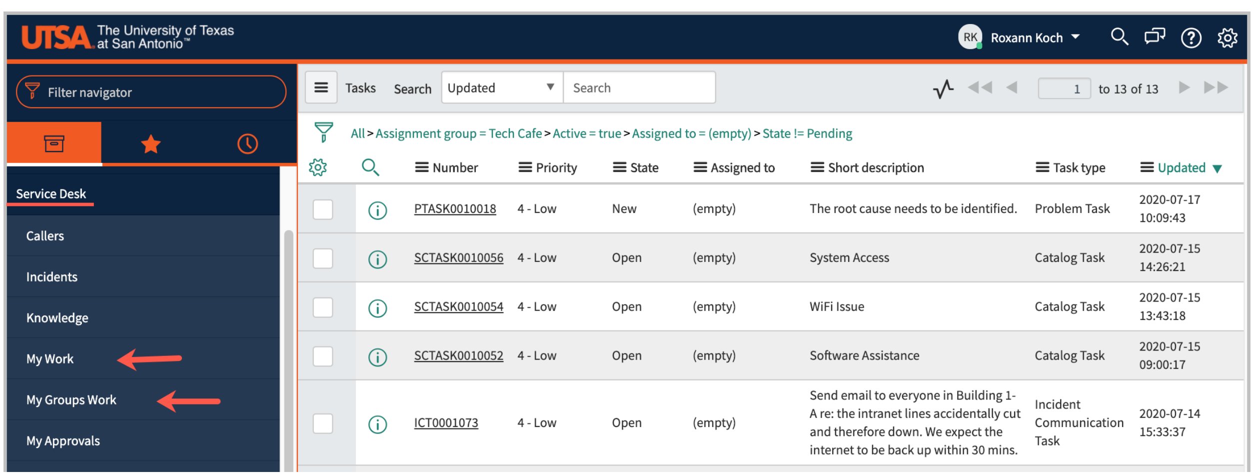


Figure 26: My Work and My Groups Work from the Frameset

From the **Agent Workspace**, find and manage your work here.

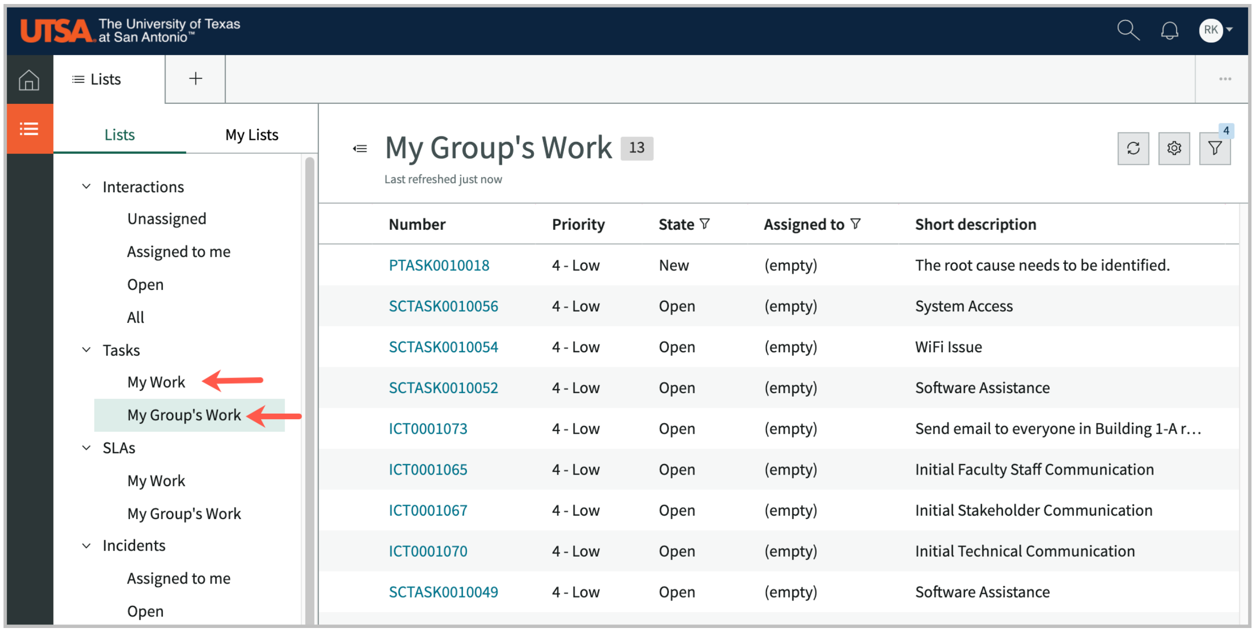


Figure 27: Find and Manage Your Work from Agent Workspace

Note: Use filters and/or reports to add to a Homepage to manage work. Click the column titles to sort.

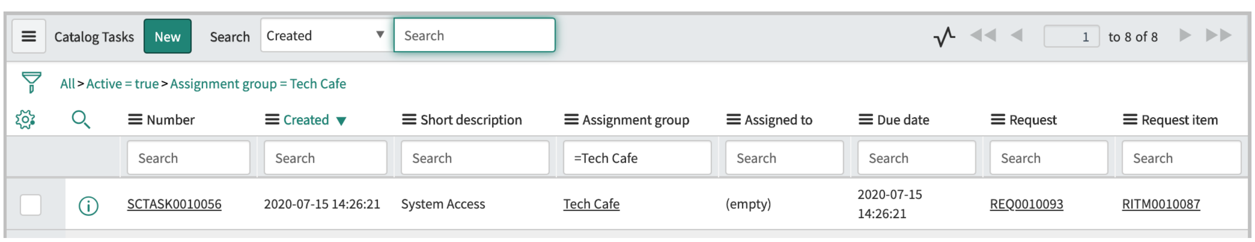


Figure 28: Use filters (column titles) to sort

SERVICE CATALOG AUTOMATION

1. A **user** requests an item from a **catalog** from the UTSA **Portal**.
2. A **workflow** kicks off and the **request** may start with an approval(s) or a task (**SCTask**).
3. The **user** can go to the **portal** and check the status of their **request** at any time.
4. The **request** gets approved, each task gets completed, the request is fulfilled and the **SCTasks/RITM/REQ records** are all closed.

FULFILLER RESPONSIBILITY

A fulfiller is responsible for managing all their work (via "My Work," "My Groups Work," and/or "Homepage/Dashboard") and fulfilling all tasks assigned to them.

STANDARD SERVICE CATALOG NOTIFICATIONS

Name	Who will receive
Request Opened on Behalf Of	Requested for
Request Item Completed	Requested for
Catalog Task Assigned to Group	Assignment Group
Catalog Task Assigned to User	Assigned to
Manager Approval	Manager

AGENT WORKSPACE

Agent Workspace is a graphical user interface that puts multiple tools on one page. ServiceNow workspaces are designed for tier 1 agents who solve customer issues.

Workspaces include all the tools that agents need to find, research, and resolve issues. ServiceNow provides different Agent Workspaces for different issue types. For example, agents using the **IT Service Management Workspace (ITSM)** track and resolve IT issues.

Agents can see all details that are related to an issue in one place – a single-pane view. An agent can have multiple records open at a time, all easily accessed on a single page.

Agent Workspace can be opened from the Application Navigator via the **Agent Workspace Home** module. When you click the module, it will open as a different interface in a separate browser tab.

Note: Make it a Favorite and put at the top of the Favorite list for quick access.

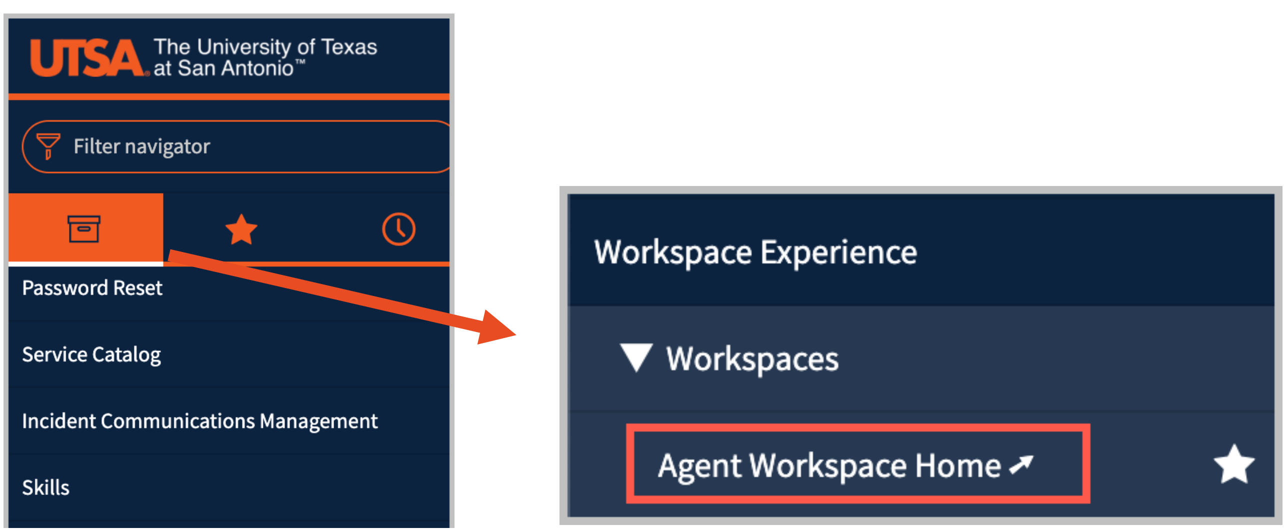


Figure 29: Agent Workspace Home

NAVIGATION

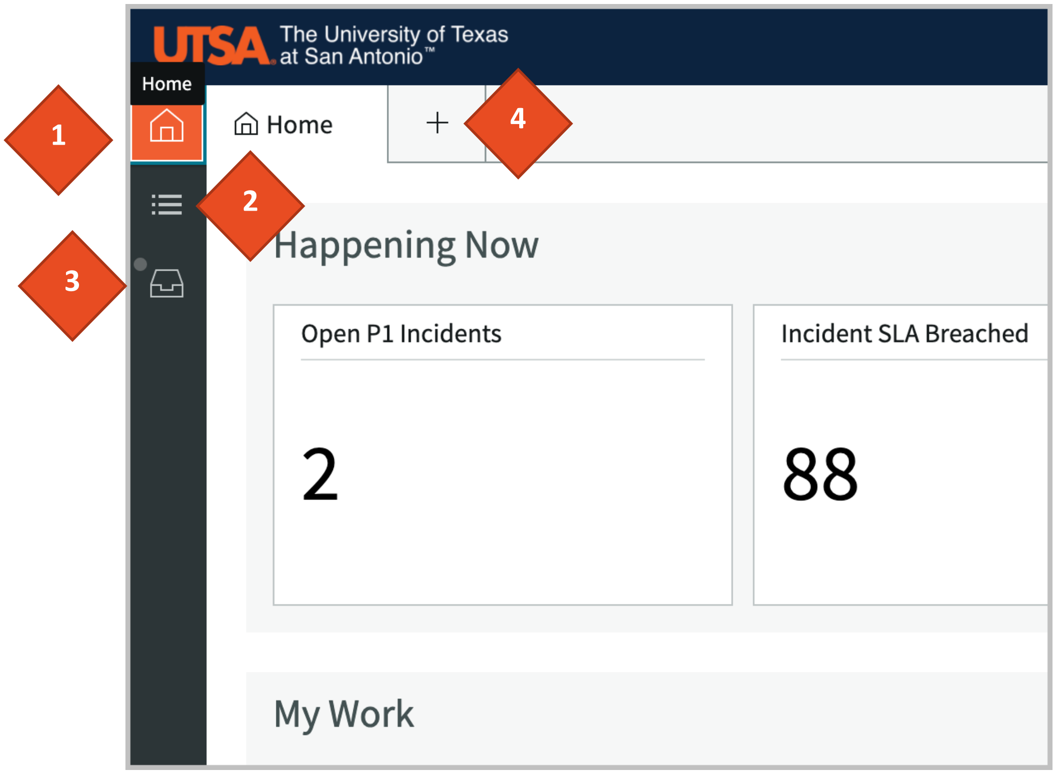


Figure 30: Workspace Navigation

1. **Home** (default)
   Easily view **My Work,** and relevant **Reports** on managing **Open Incidents** and **SLAs**
2. **Lists**
   View lists of **Incidents**, **Requests**, **Tasks**, or create your own under "My Lists." From the List View, a fulfiller can access any of their tasks or their group's tasks.
3. **Inbox**
   Queue to receive new **Incidents** or **Interactions** (Emails)
4. **+ (New button)**
   Open a new **Interaction Form**, then save the record and flip to an **Incident** or **Request**

One of the main benefits of the **Agent Workspace** interface is that it allows multiple **records** to be open at the same time (as tabs).

These **records** can include: **Interactions**, **Incidents**, **Problems**, **Changes**, **Change Tasks**, **Requests**, and **SC Tasks**.

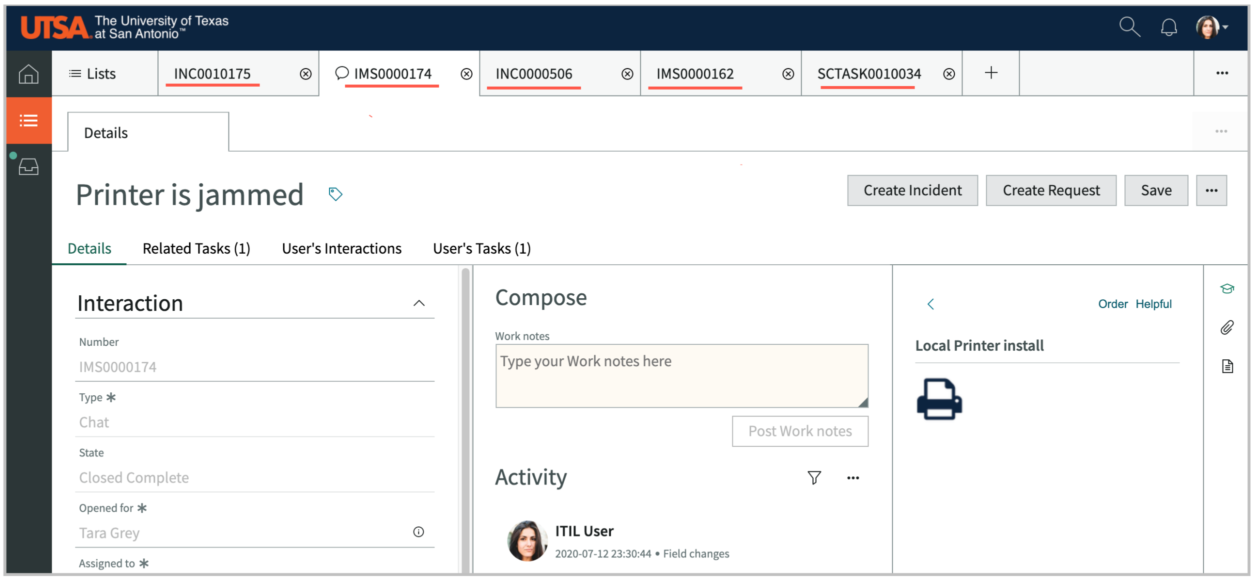


Figure 31: Agent Workspace tabs

Note that the **Agent Workspace** supports two levels of tabs. In figure 31, the high-level Interaction form is selected, and a "details" tab is open. If the agent were to "Create Incident," another tab would appear next to "details" (still within the high-level Interaction form).

You can work an **Incident** in the same manner with all the same functionality within Agent Workspace as you can working an **Incident** within the **frameset**. Both interfaces offer the same functionality.

CHANGE AGENT STATUS

Change your Status to **Available** to receive Interactions from the queue. Interactions are from **calls** (CTI) and **emails** sent to **utsa@service-now.com**.

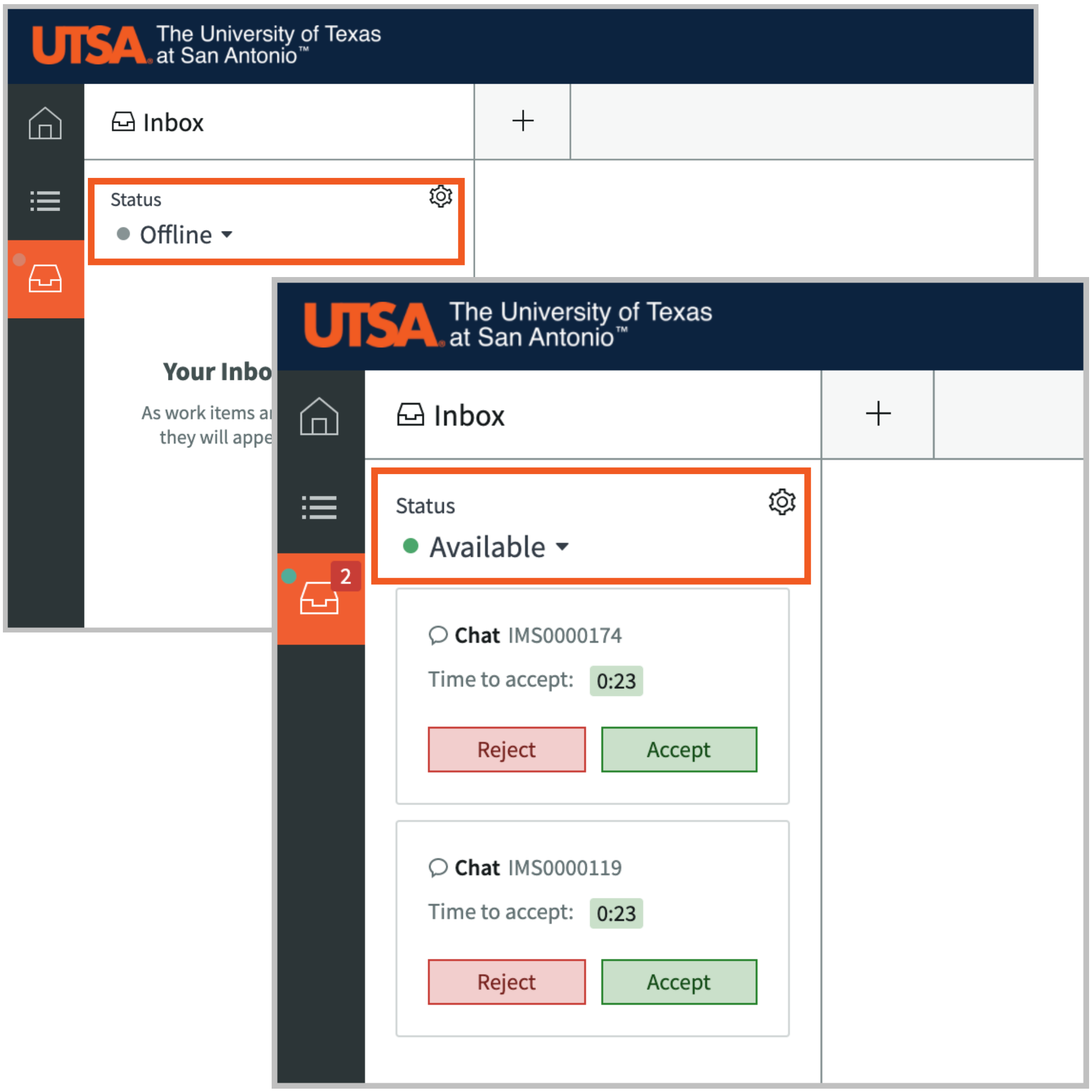


Figure 32: Agent Status

VISIBILITY

The icons at the bottom of the form change what is visible in the frame.

1. Form in full
2. Form and Activity
3. Activity in full screen

AGENT ASSIST

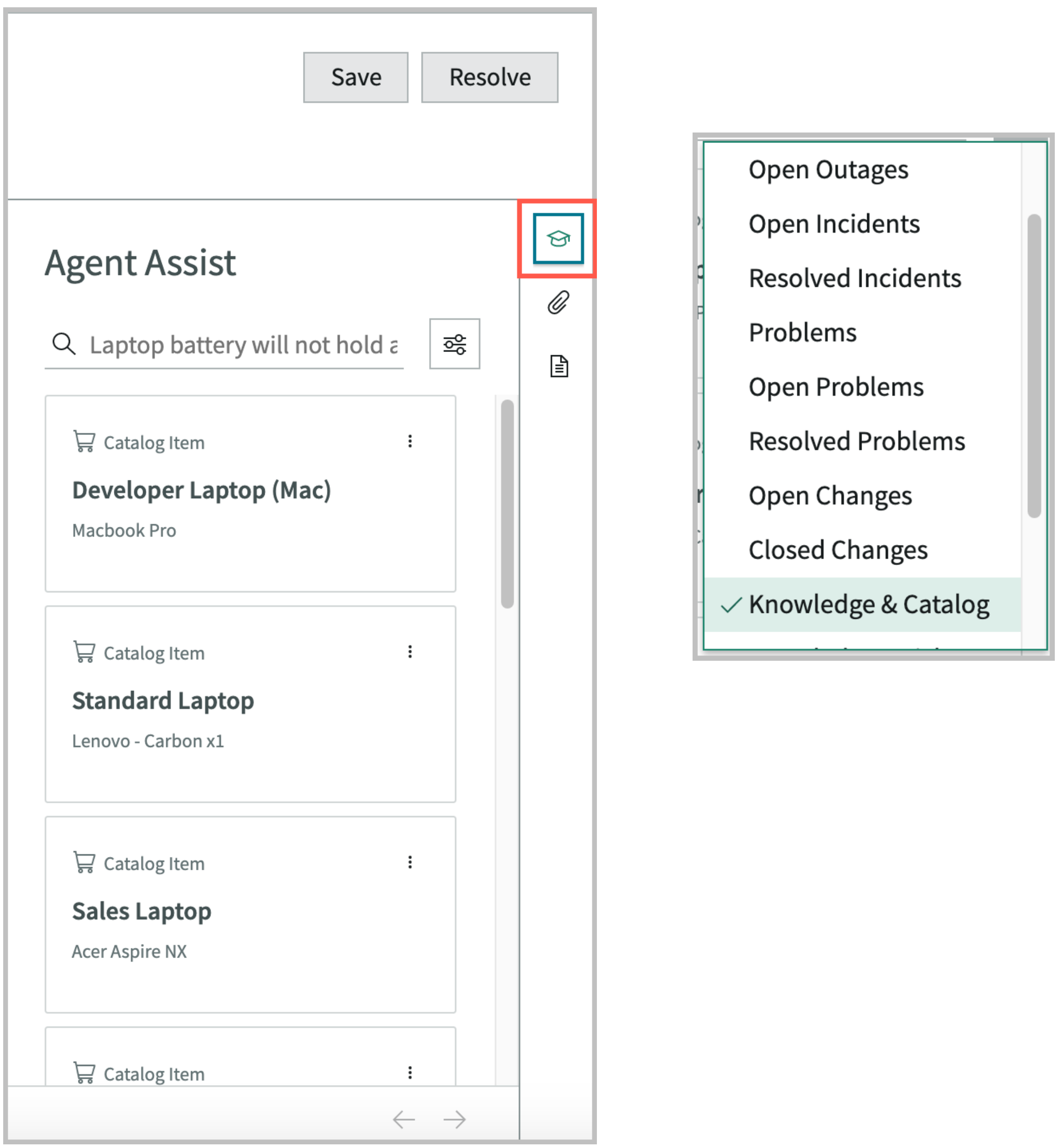
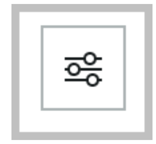


Figure 33: Agent Assist

The **Agent Assist** window can toggle open or closed via the highlighted icon to the far right of the frame.

Agent Assist can show different types of records based on the text in the **Short Description** field.

Select the type of record by clicking the **Select a Search Resource** icon.



COMPLETING AN INTERACTION

When an **Interaction** is accepted, the **Service Desk Agent** will complete the interaction form and determine if the interaction is an **Incident** or a **Request**.

FLIP AN INTERACTION TO AN INCIDENT

Click **Create Incident** to flip the **Interaction** to an **Incident**.

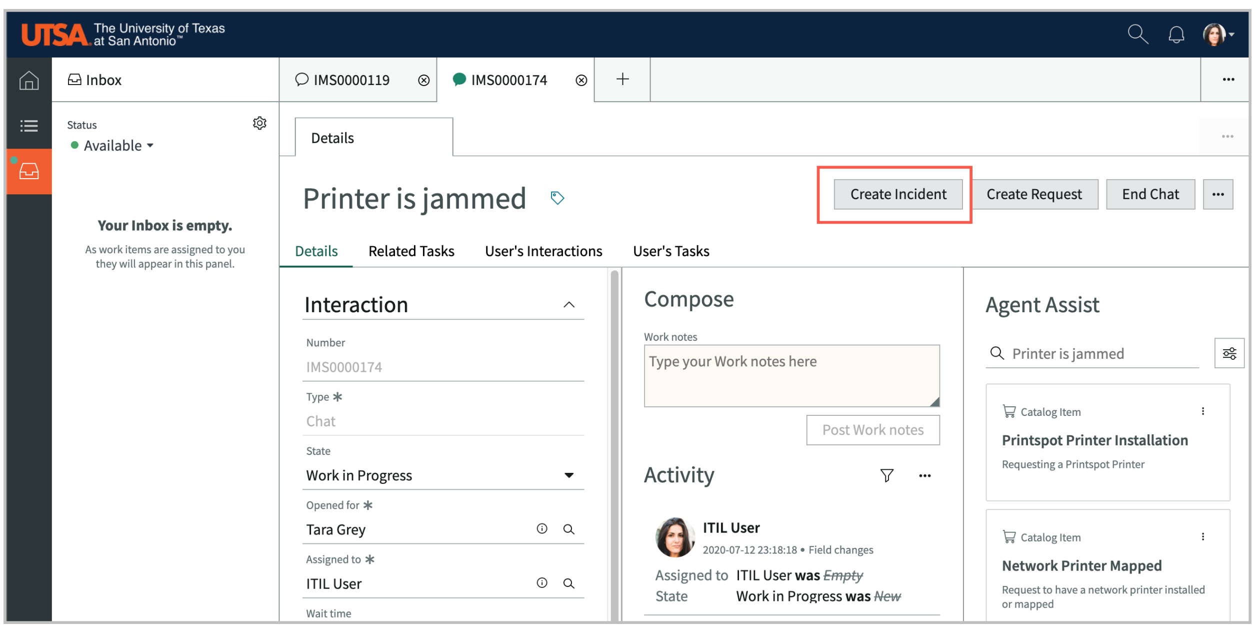


Figure 34: Completing an Interaction

This creates an **Incident Record**:

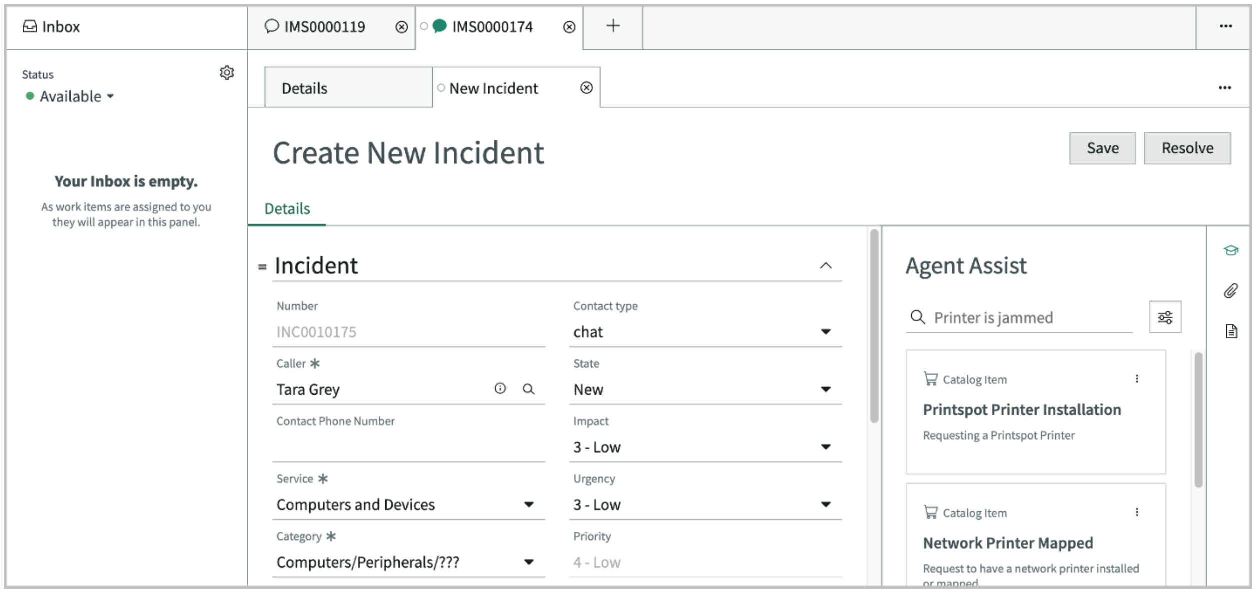


Figure 35: New Incident Record

Next Steps: Assign the **Incident** to yourself, address the **Impact** and **Urgency**, and **Save** the record.

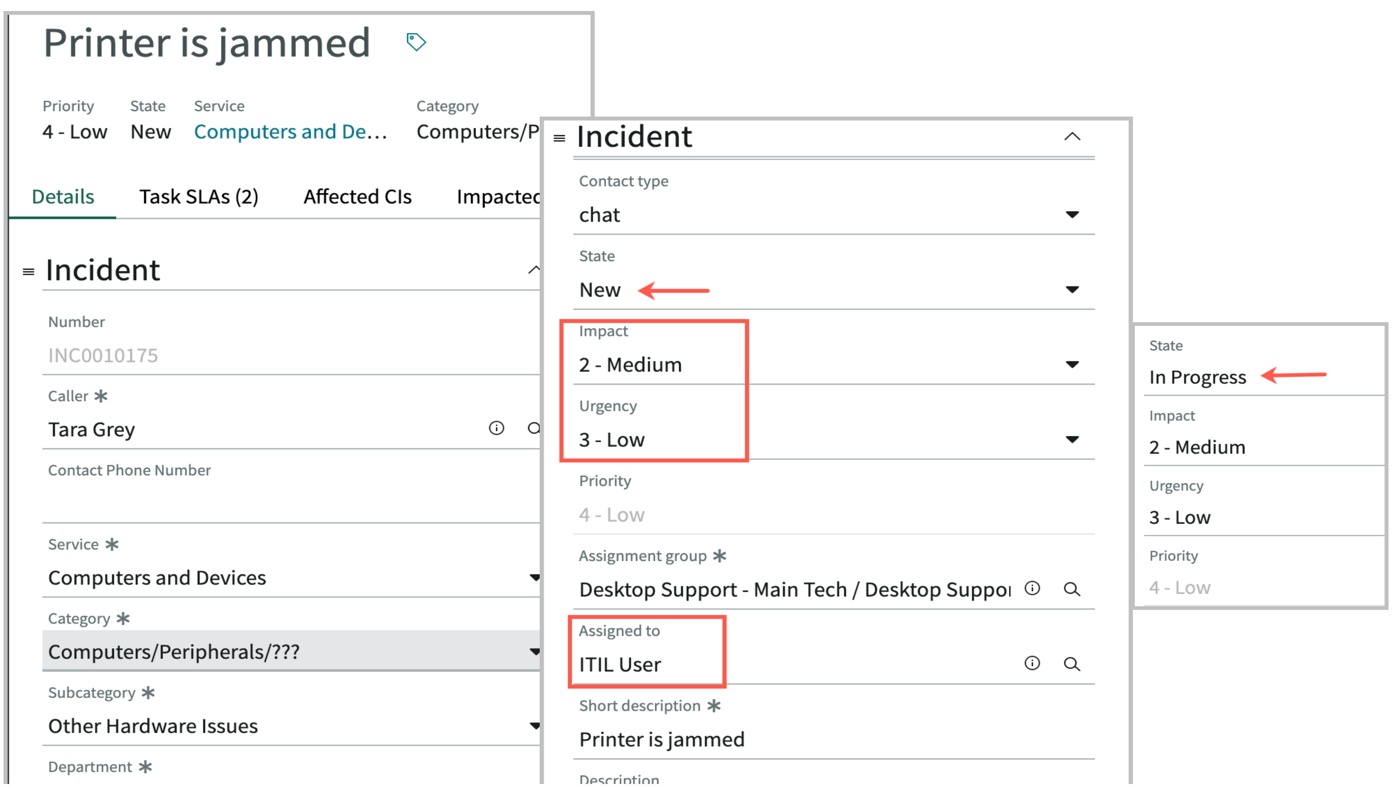


Figure 36: Incident assignment menu

Note: When the **Record** is saved, the **State** changes to **In Progress**.

Alert: When the **Incident** is created, the **Interaction** does NOT automatically close. The **Fulfiller** will need to close it.

Flip an Interaction to a Request

Click **Create Request** to flip an **Interaction** to a **Request**

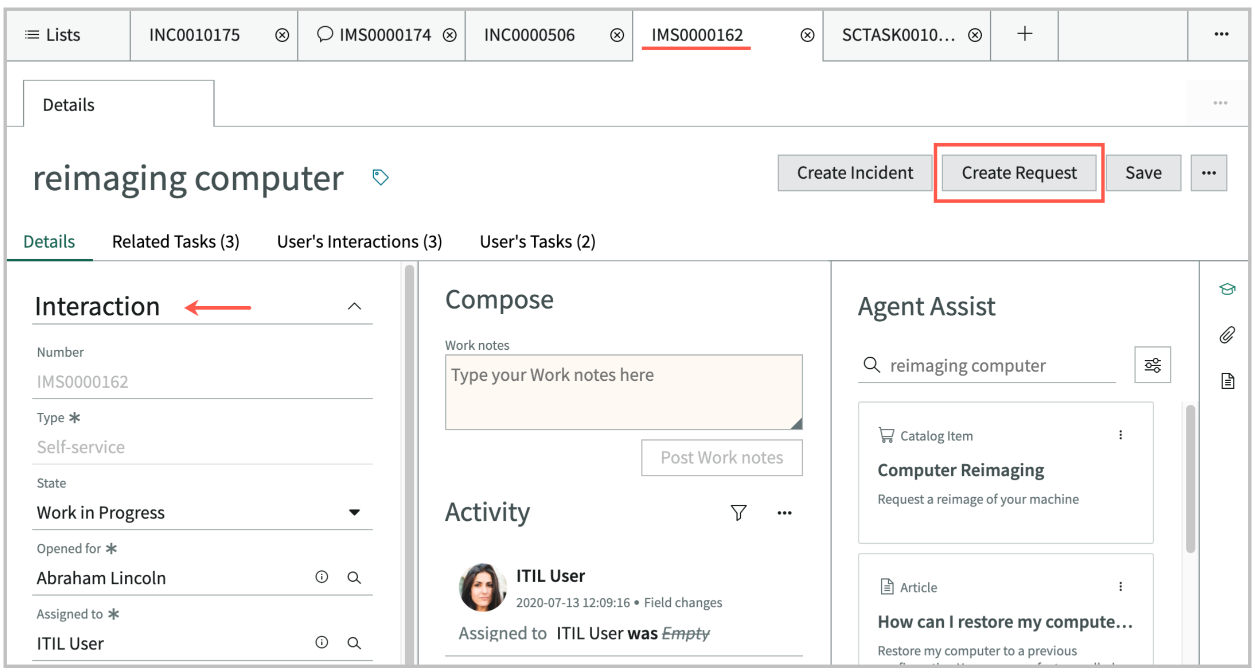


Figure 37: Create Request

This will take you to the **Catalog**, where you will search for and select the **Catalog Item** to be requested.

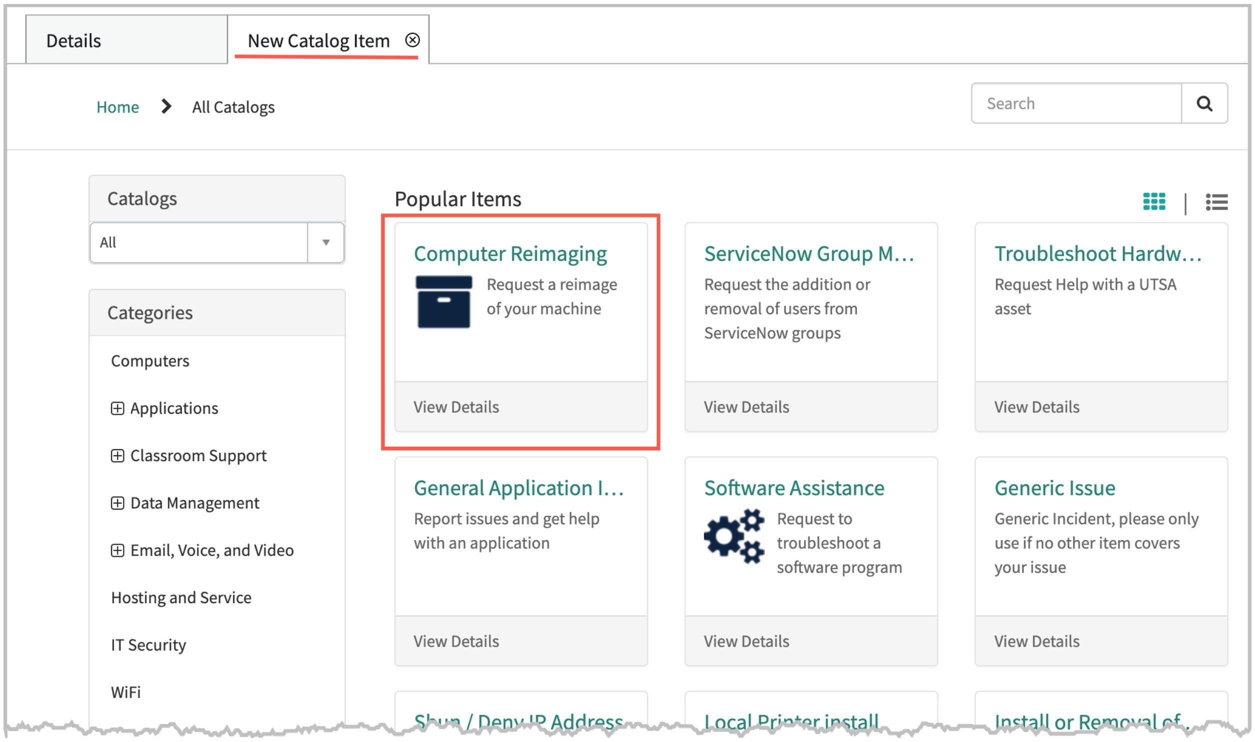


Figure 38: Catalog Item Search

Complete the **Catalog Item Request** form and click **Order Now**.

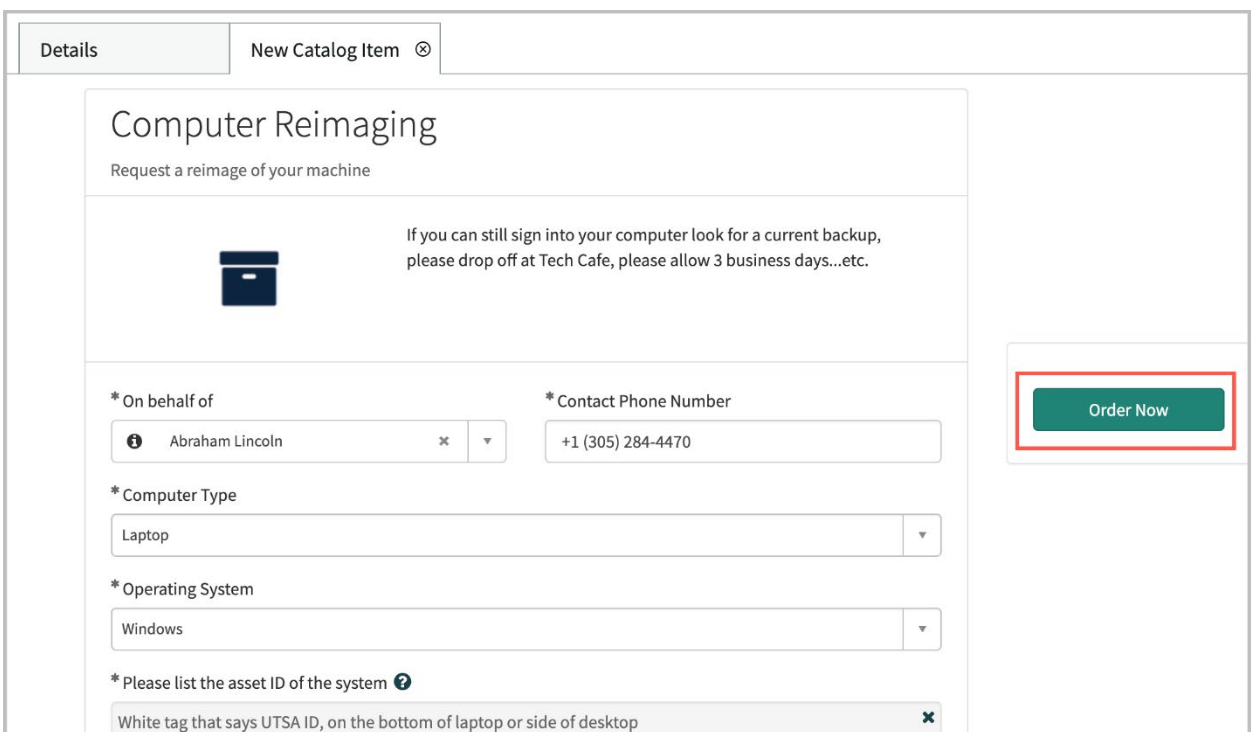


Figure 39: Catalog Item Request Form

Create a Request from an Incident

A Request can be created from an Incident by clicking the 3 dots icon and select **Create Request**.

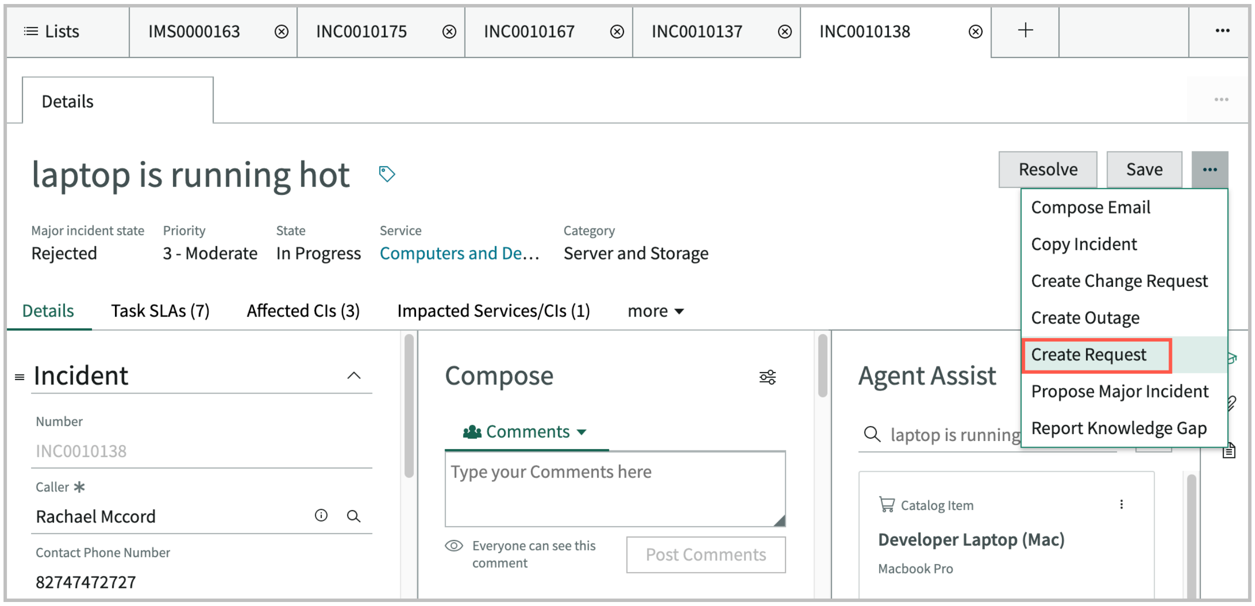


Figure 40: Create a Request from an Incident

Select the **Catalog Item**, fill out the form and save the **Request** record.

The Incident will remain open after you create the **Request** and needs to be processed like any other Incident.

From an Incident, you can **Copy Incident**, Create a **Change Request**, Create a **Problem** or **Propose a Major Incident** via the 3-dot icon.

Child Incidents

A **Child Incident** can be created from an Incident when on the Child Incidents tab (New button).

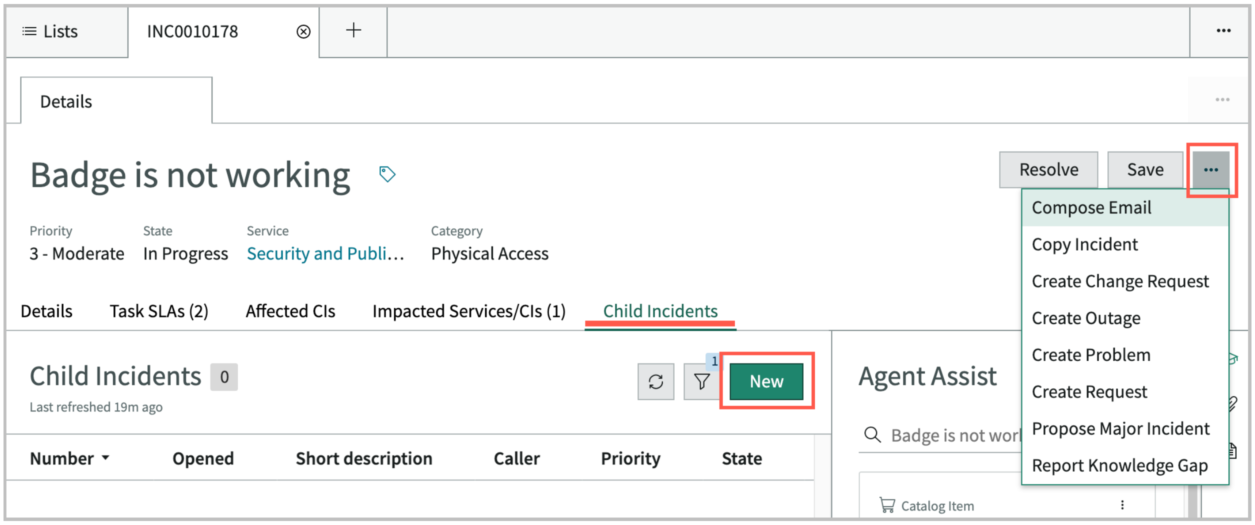


Figure 41: Other Incident Management Options

When on the **Parent Incident**, the **Child Incident(s)** can be found within the **Child Incidents** tab.

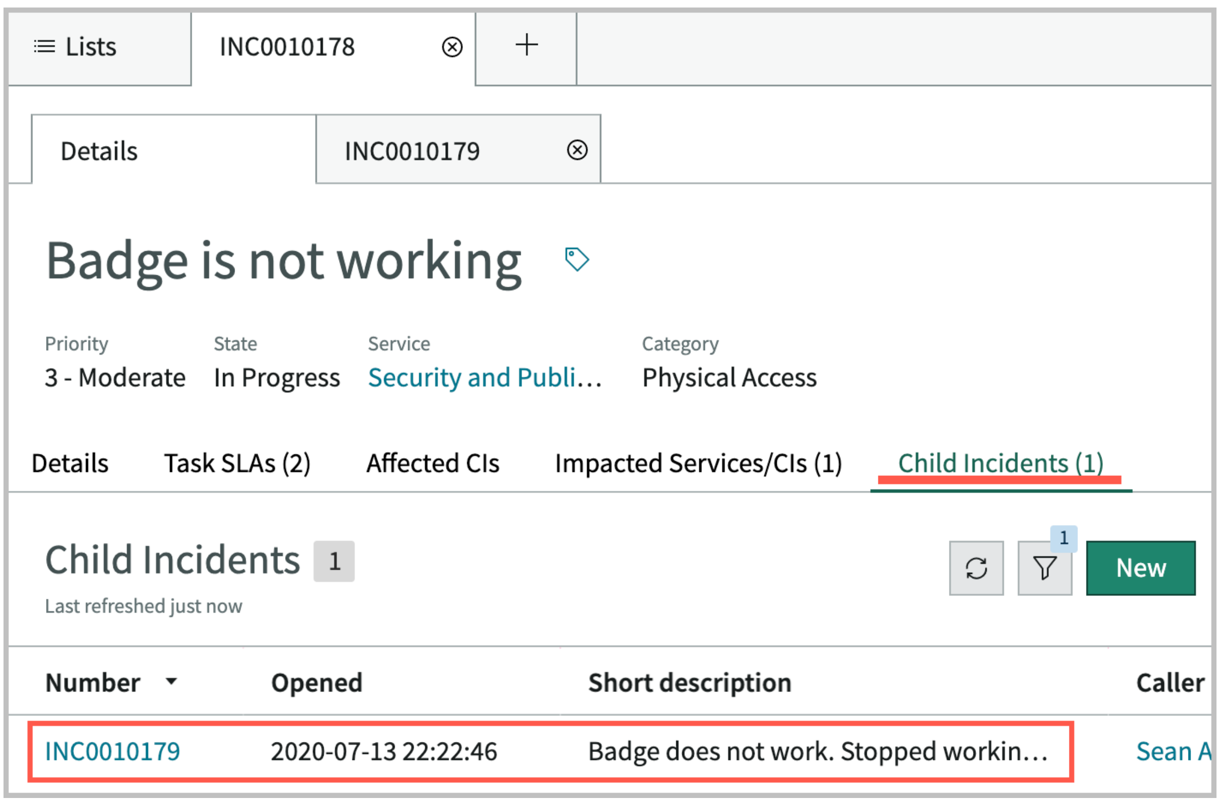


Figure 42: Child Incidents Tab

When on the **Child Incident**, the **Parent Incident** can be found on the Related Records section.

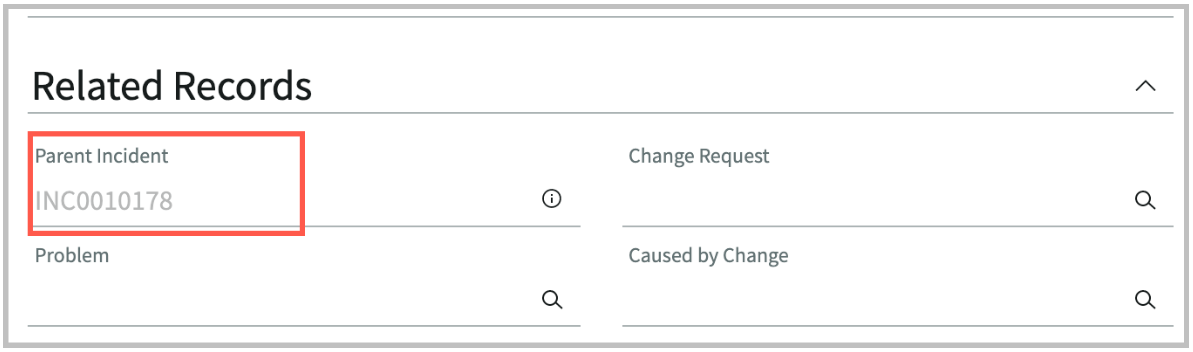


Figure 43: Related Records

INCIDENT MANAGEMENT

The goal of **Incident Management** is to restore normal service operation while minimizing impact to business operations and maintaining quality.

ServiceNow Incident Management supports the incident management process in the following ways:

- Log **incidents**
- Classify **incidents** by **impact** and **urgency** to prioritize work
- Assign to appropriate groups for quick resolution
- Escalate as necessary for further investigation
- **Resolve** the **incident** and notify the **user**/caller who reported it
- Use **reports** to monitor, track, and analyze service levels and improvement

Any user can record an incident and track it through the entire incident life cycle until service has been restored and the issue has been resolved.

INCIDENT MANAGEMENT ROLES

PROCESS OWNER

Maintains the **Incident Management** process by ensuring the process is implemented and followed by all stakeholders.

INCIDENT MANAGER

Ensures the **incident resolution** meets service level targets. Manages **incident escalations**, helps coordinate the interaction between **incident support levels** and analyzes metrics and improvement opportunities.

Major Incident Manager

Responsible for managing **tasks** and **communications** within resolution teams as well as IT and Business stakeholders.

Service Desk Agent

First line of support for new **incidents**

Tier 2 Support

First escalation point from Service Desk and they are SMEs of an IT service

Tier 3 Support

Next level of escalation. They are technical SMEs/administrators of an IT service.

End User

Report **incidents** when something is not working properly.

INCIDENT MANAGEMENT PROCESS

1. Create an **incident**
    a. Classify the **incident**
    b. Triage the **incident**
    c. Assign the **incident record** for investigation and diagnosis
2. Investigate the issue (research **knowledge articles** and known error records
    a. Document all findings and steps taken
3. Diagnose the issue
    a. Document actions and findings
4. Implement the solution
5. Change the **State** to **Resolved** and document the resolution
6. **Incident** closes automatically after seven days (if end user does not indicate that the service is not restored)

INCIDENT MANAGEMENT STATES

New – Incident has been logged but not yet triaged.

In Progress – Incident is assigned and being investigated.

On Hold – Incident investigation is paused (due to a problem, a chance, awaiting customer or external vendor information).

Resolved – Issue is resolved, awaiting confirmation from customer of service restoration.

Closed – The incident was automatically closed by the system or by an ITIL admin.

Canceled – Triaged incident found to be a duplicate or not actually an incident.

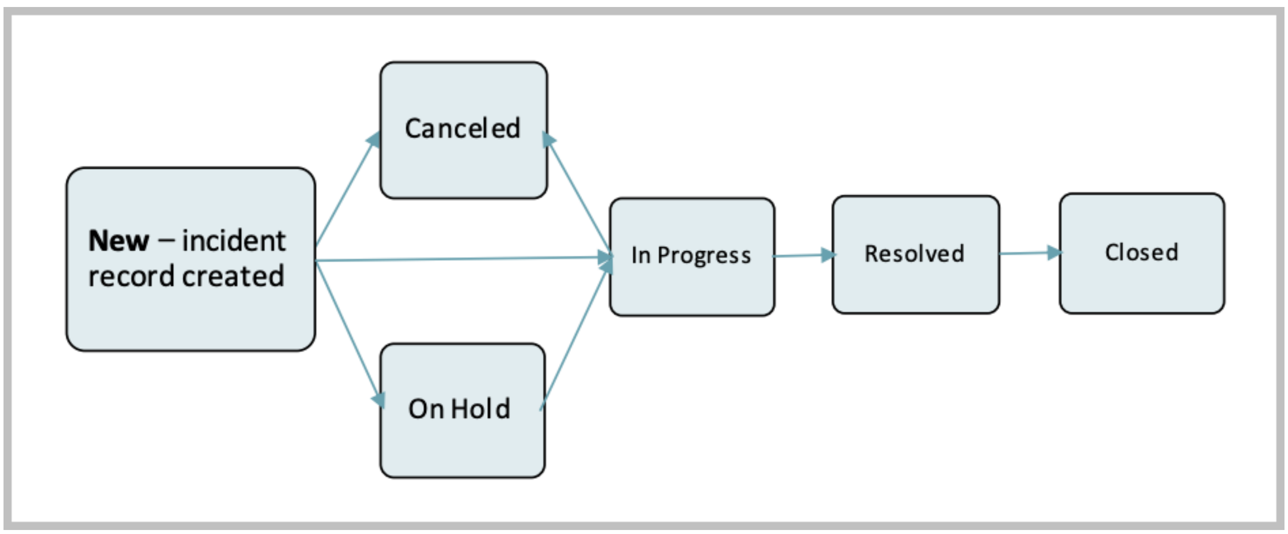


Figure 44: Incident Management States

Note: If the caller updates the incident, the **On hold** reason field is cleared and the state of the **incident** is changed to **In Progress**. An email notification is sent to the user in the **Assigned to** field as well as to the users in the **Watch list**.

An incident can be placed in the **On hold** state one or more times prior to being closed.

When the status of an **Incident** is changed to anything but **Canceled**, **Resolved**, or **Closed**, the Resolve fields are cleared. When an **Incident** that is in the **On Hold** State is updated, the **On Hold** Reason field is cleared.

If you are not satisfied with the resolution, you can request to reopen the incident from the resolution notification email or from the incident itself. The state of the incident is then changed from **Resolved** to **In Progress**. If the incident is already closed, you can open an incident with selected field values from the closed incident by replying to any email related to the closed incident.

INCIDENT NOTES

Collaborator Notes are internal documentation about how to resolve the Incident or steps taken to resolve it.

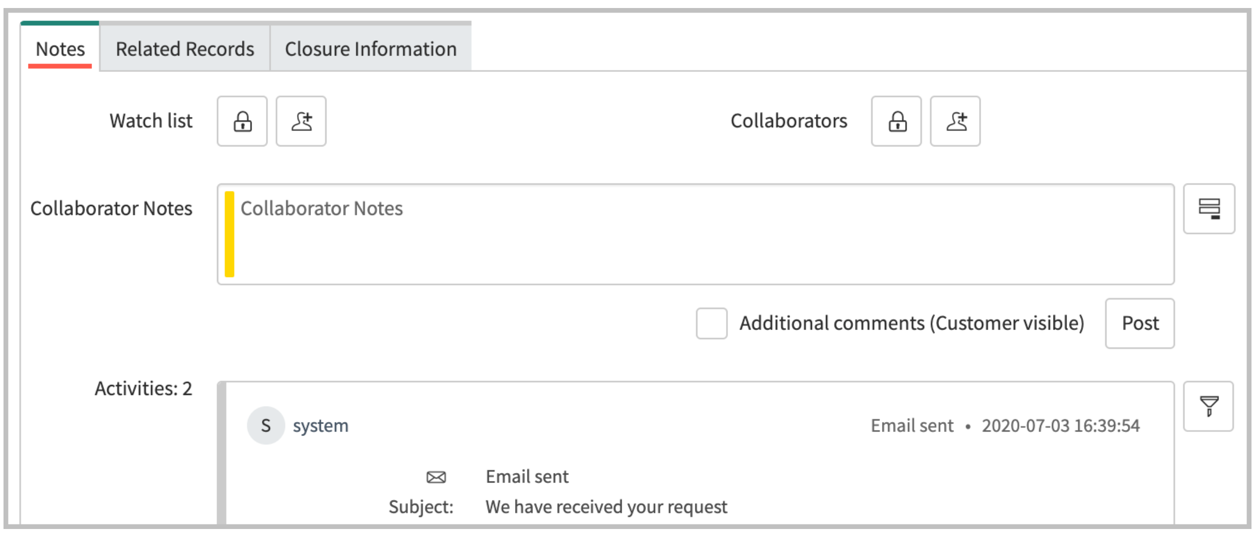


Figure 45: Collaborator Notes

Additional Comments are comments or questions to the customer (Caller) sent as an email notification. Caller's email response will be added to the Incident as **Activity**.

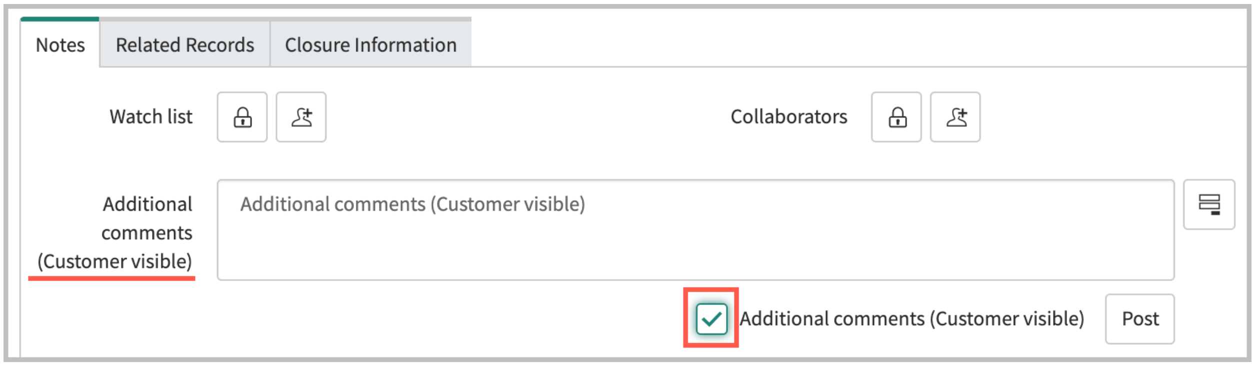


Figure 46: Additional Comments View

You can toggle between the two fields via the check box.

Important: Who Can See What

Anything you place in the "additional comments" field will be visible to the caller

Watch List Vs. Collaborators List:

Watch List is for users or groups to receive notifications about the **incident** when comments are added.

Collaborators List is for users or groups to receive notifications about the **incident** when work notes are added.

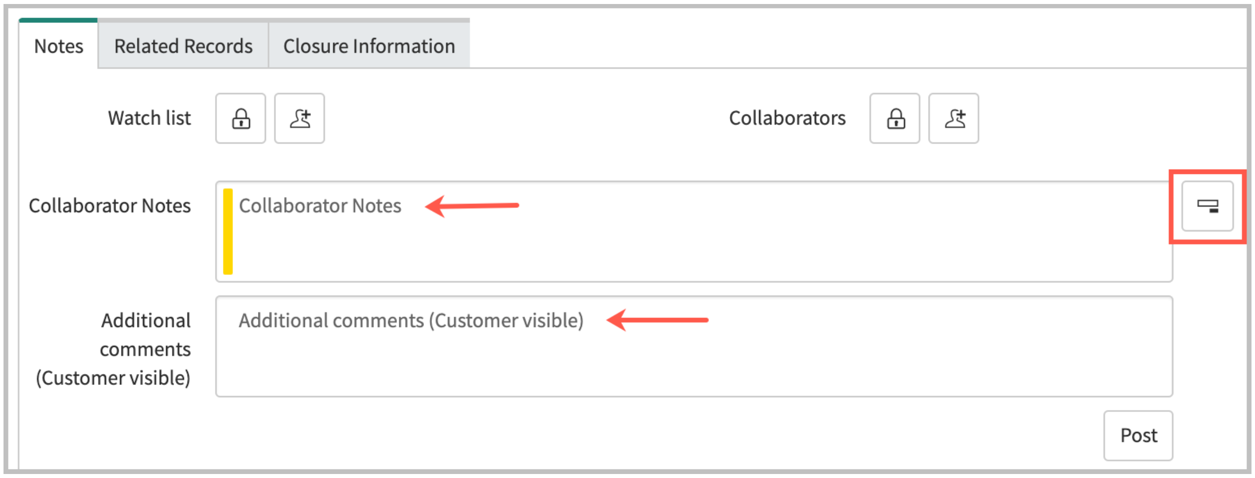
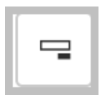
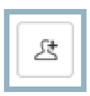


Figure 47: Notes and Lists

Users can toggle to reflect one text box or both text boxes for notes/comments by selecting this icon: 

Click the padlock icon to unlock the field to add users or groups to the **Watch** or **Collaborators list**.

Click the  icon to add yourself to one or both lists.

Related Records

Related Records allow an Incident to be linked to another **Incident** or a **Problem** or a **Change Request** or will be noted if a Change *caused* the **Incident**.

Figure 48: Related Records Tab

INCIDENT PRIORITY CHANGES

When the **Priority** changes (up or down), a **Collaborator Note** is required to explain the change in **Priority**.

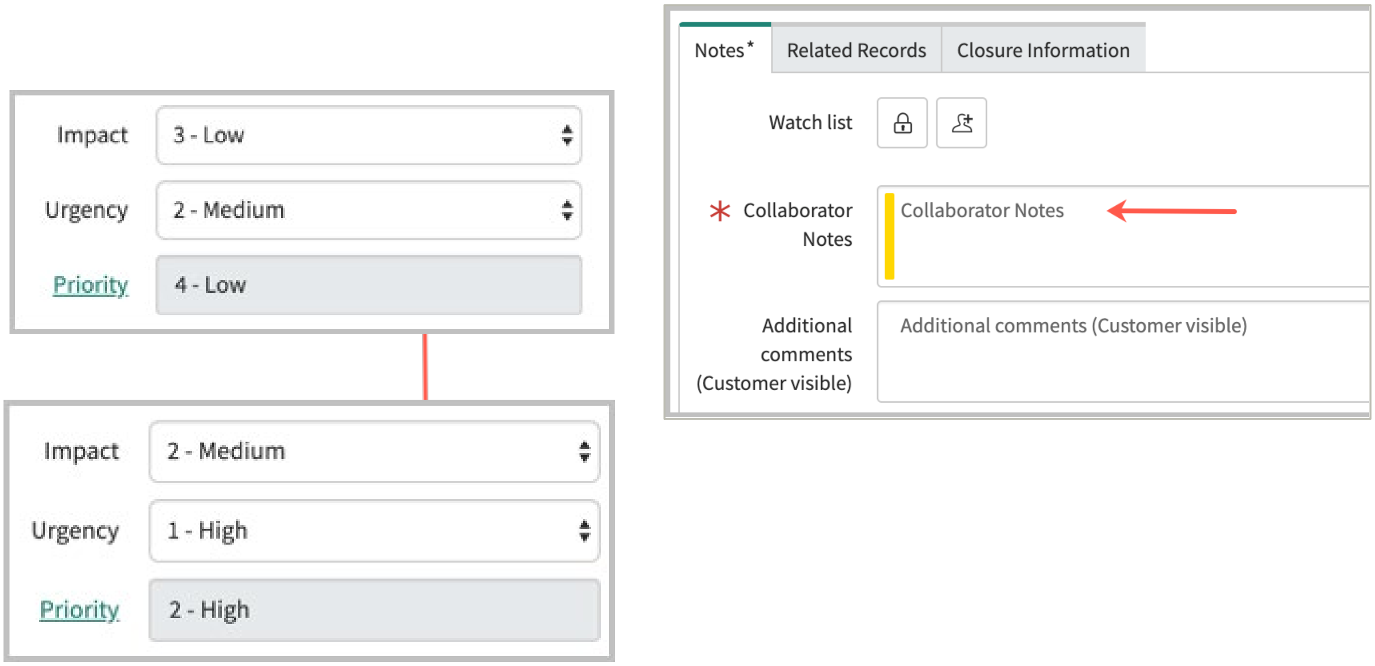


Figure 49: Incident Priority Changes

PLACING AN INCIDENT ON HOLD

An **Incident** can be put **On Hold** when the **fulfiller** is waiting for something out of their control to resolve the **incident**. Putting an **Incident on hold** will pause the **Task SLA**. The **On Hold** also requires information to be provided in the **Work Notes** and **Additional Comments** if *Awaiting Customer Response* is selected.

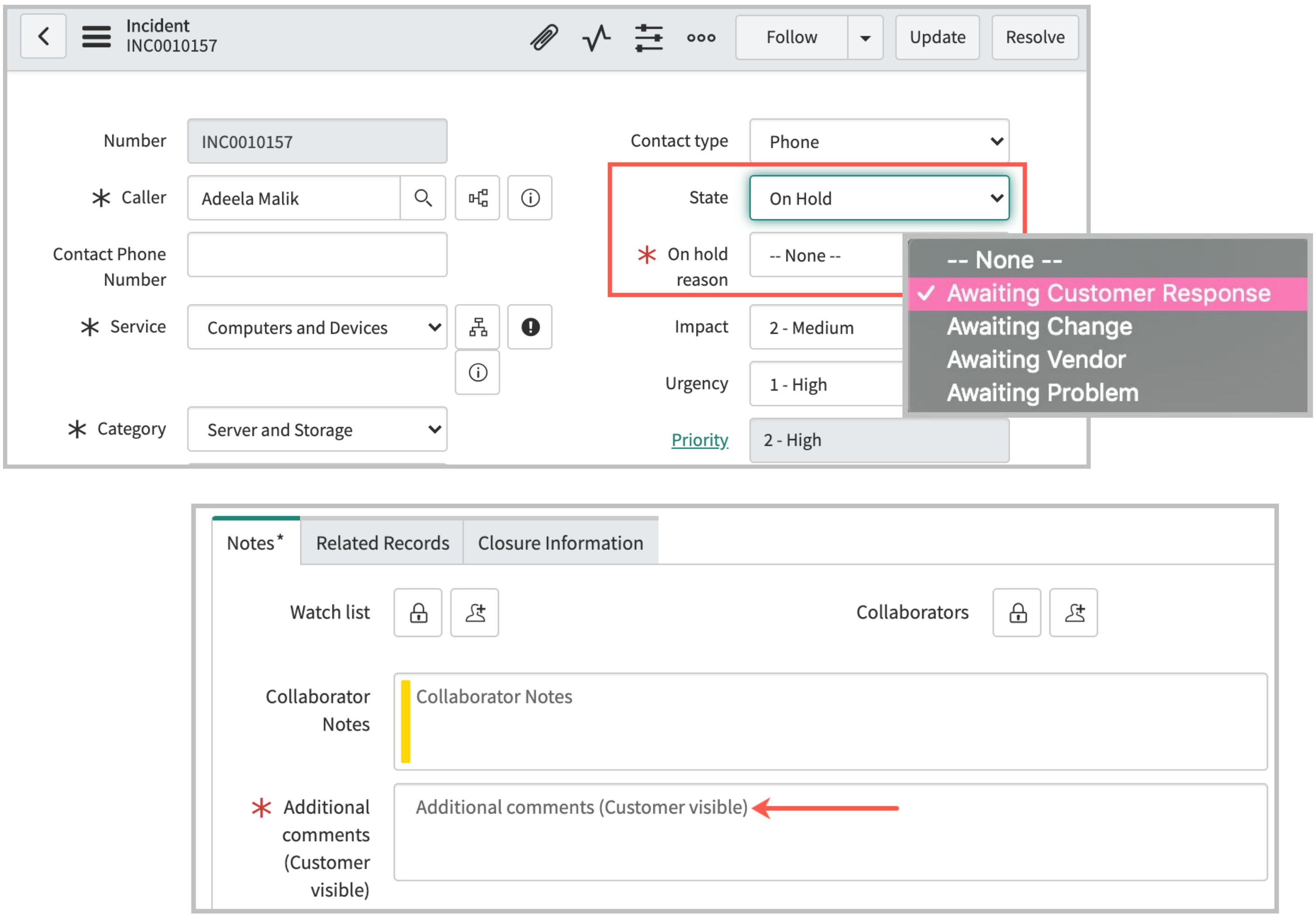


Figure 50: Placing an Incident on Hold

RESOLVING AN INCIDENT

To resolve an Incident, click the Resolve button. The system will let you know there are 2 mandatory fields that need filled in.

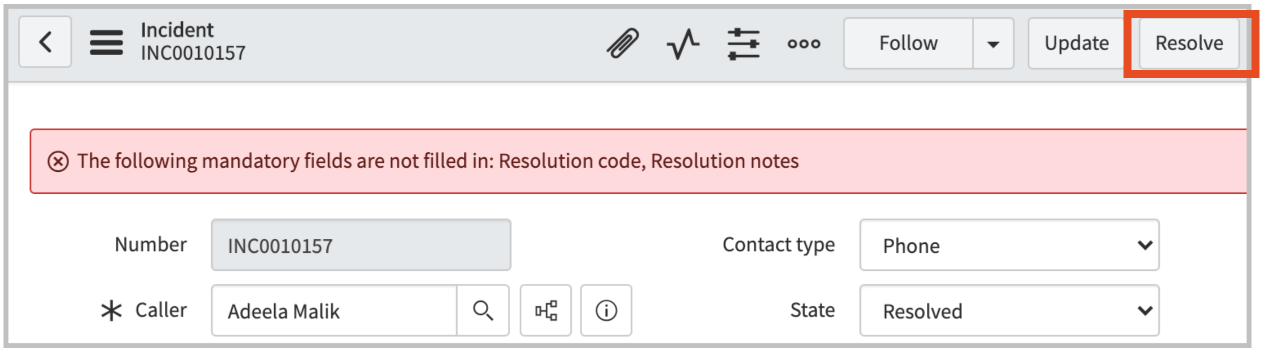


Figure 51: Resolving an Incident

Note: An **Incident** is permanently **Closed** by the system 7 business days after it is **Resolved** if it is not reopened.

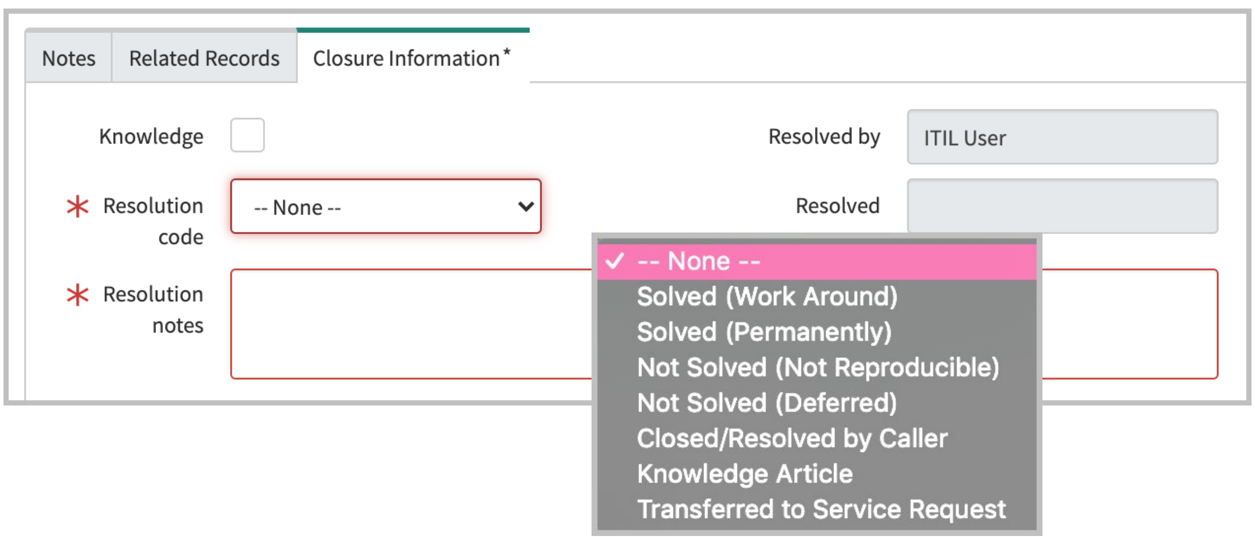


Figure 52: Resolution Codes

Knowledge is checked if a knowledge article is created from this incident when it was closed

Resolution Code is how an incident was resolved

Resolution Notes is communication to the Caller about the resolution of their incident

Resolved By is the Fulfiller listed in the Assigned To field

Resolved is the date and time when the incident was resolved (stamped by the system)

When the **Knowledge** box is checked and when the **incident** record is **Closed**, the system creates a draft knowledge article with some information from the **Incident** copied to the knowledge article.

The following fields are copied from the Incident to the Article:

INCIDENT	KNOWLEDGE
Short description	Short description
Work Notes	Text
Number	Source

TASK SLAS

Service Level Agreements (**SLAs**) specify the time within which service must be provided

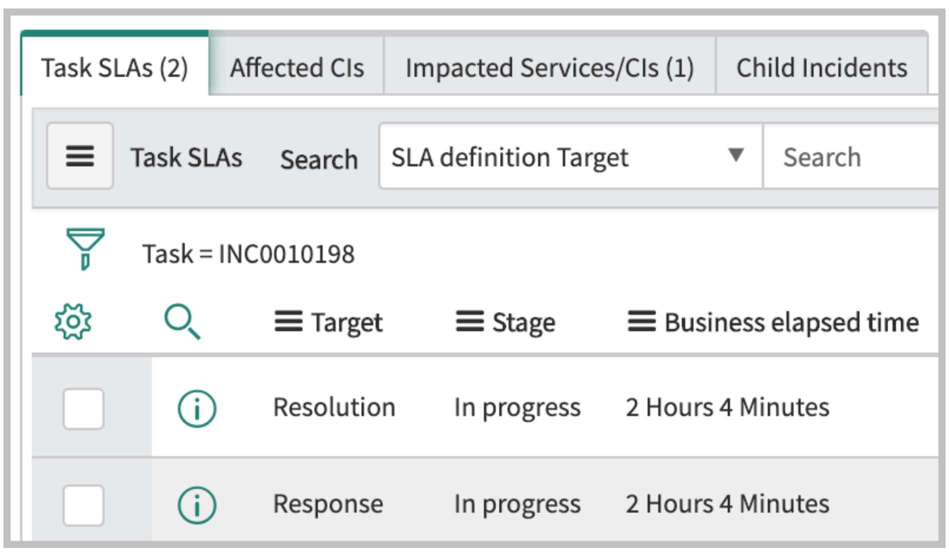


Figure 53: Task SLAs

SLAs can be created for any task-type record.

The **Response** SLA timer stops when the Incident record is assigned to an individual.

The **Resolution** SLA timer stops when the Incident is put in the Resolved State.

ADD AFFECTED CIS

Add multiple **Affected CIs** to an **Incident** to capture all the CIs that are affected by the same **incident**.

Note: This is not something UTSA will use initially but is there for use in the future.

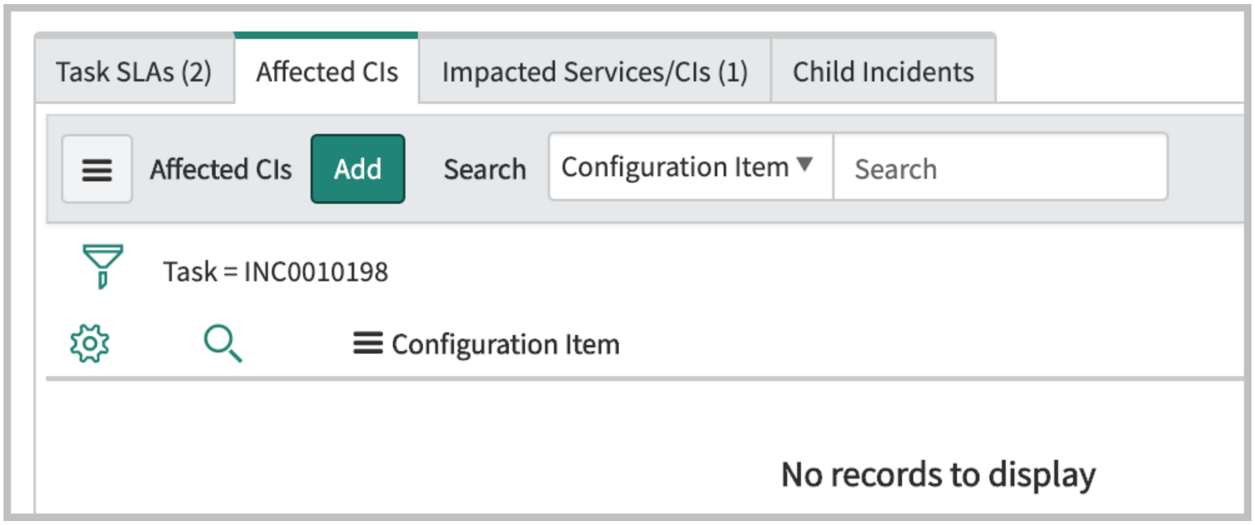


Figure 54: Affected CIs

IMPACTED SERVICES /CIS

Identify all **Services** (CIs) impacted by the **Incident**.
For now, the system will automatically identify an **Impacted Service** if applicable.

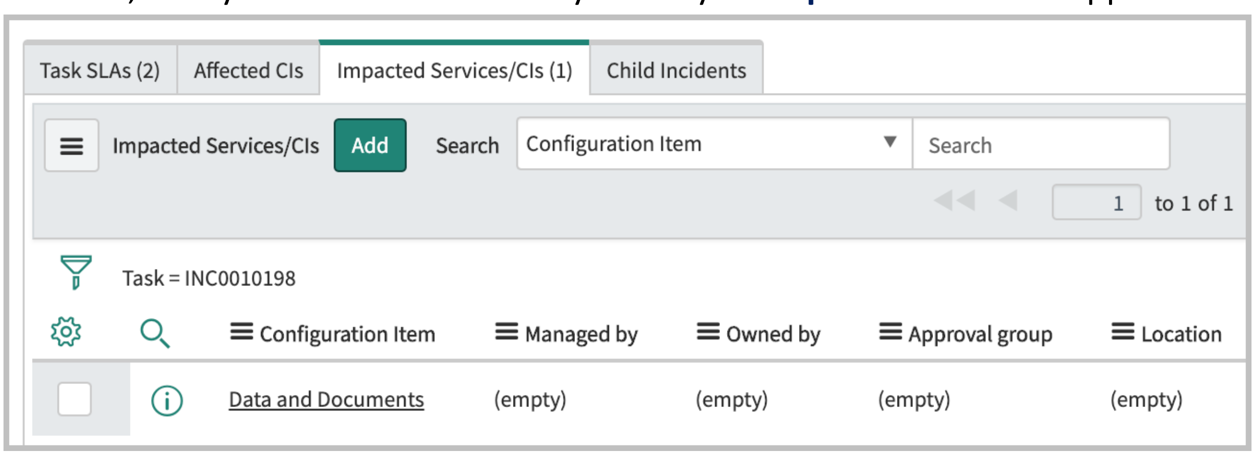


Figure 55: Impacted Services/CIs

CHILD INCIDENTS

Creating a **Child Incident** from an **Incident** copies the details of the **Parent Incident** and links the two **incidents** together. To do this, click the "New" button.

To link an existing **Incident Record (Child Incident)** to an **Incident (Parent Incident)**, click the "Edit" button.

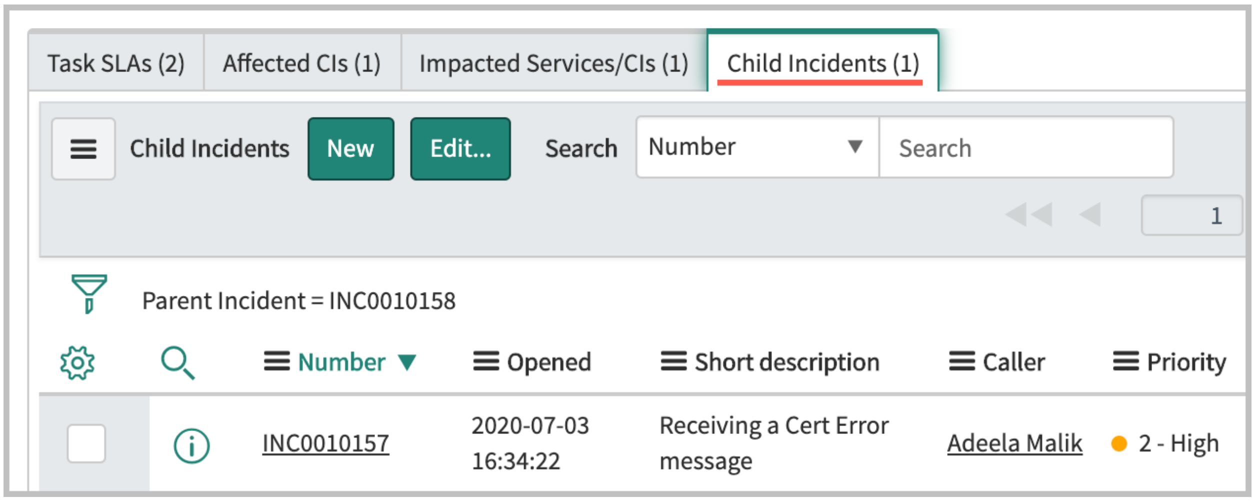


Figure 56: Creating and Editing Child Incidents

The **parent** and the **child incidents** are synchronized such that the state of a **child incident** changes depending on the state of the **parent incident**.

- If **Parent State** is In Progress, **Child State** is **In Progress**.
- If **Parent State** is On Hold Awaiting Change or Problem or Vendor, **Child State** is same as **Parent**.
- If **Parent State** is On Hold Awaiting Customer Response, **Child State** is Not updated.
- If **Parent State** is Resolved, **Child State** is **Resolved**. This should copy Resolution Notes from Parent to Child.
- If **Parent State** is Closed, **Child incidents** must always be closed by caller or by the system based on auto closure property.

Note: If a parent incident reopens, the child incident state should not change because the incident is already resolved.

When an incident has a child incident, the following actions take place:

- If an ITIL user reopens the parent incident, then the parent incident as well as the child incident reopen. Both the parent and the child incident state are set to **In Progress**.
- If an ESS user reopens the parent incident, the parent incident state is set to **In Progress** but the child incident is not reopened.

IMPACT AND URGENCY

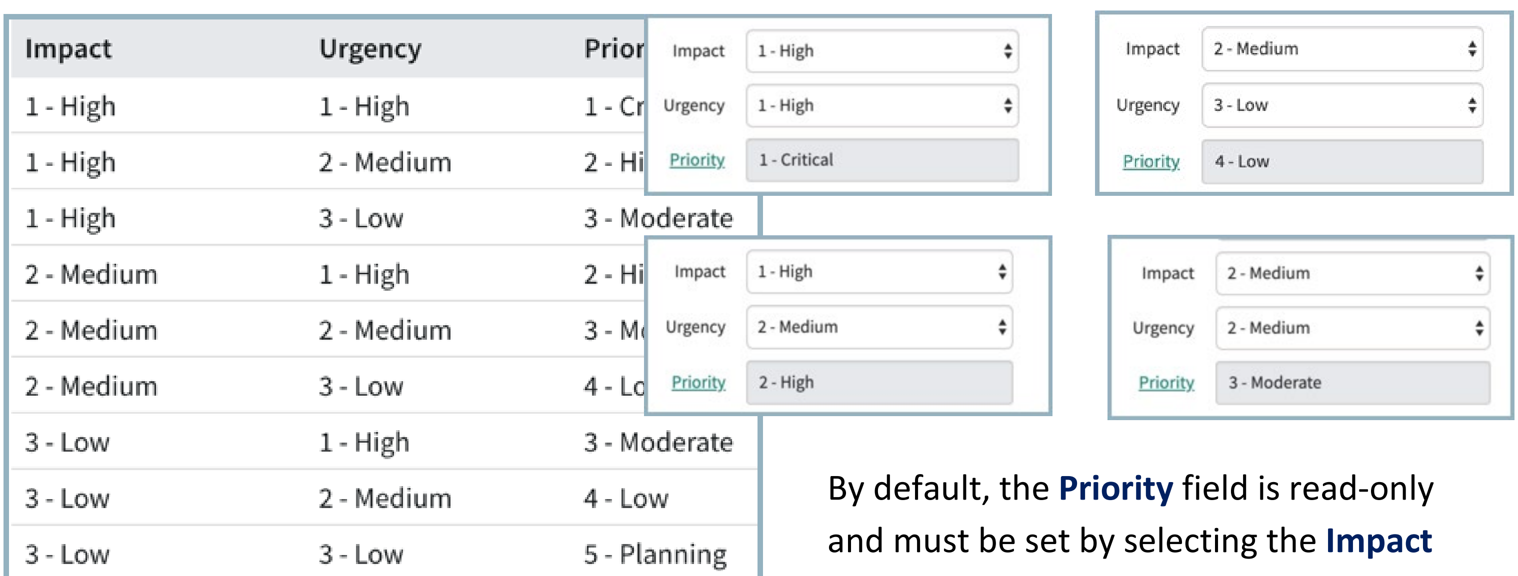
ITIL methodology uses three metrics for determining the order in which incidents are processed.

Impact: The effect that the task has on business

Urgency: The extent to which the task resolution can be delayed.

Priority: How quickly the service desk should address the task.

Priority is determined by **Impact** and **Urgency**. Each **Priority** level (1-Critical, 2-High, 3-Moderate, 4-Low, 5-Planning) has a Target Resolution and SLA.



Impact	Urgency	Prior
1 - High	1 - High	1 - Cr
1 - High	2 - Medium	2 - Hi
1 - High	3 - Low	3 - Moderate
2 - Medium	1 - High	2 - Hi
2 - Medium	2 - Medium	3 - M
2 - Medium	3 - Low	4 - Lo
3 - Low	1 - High	3 - Moderate
3 - Low	2 - Medium	4 - Low
3 - Low	3 - Low	5 - Planning

Figure 57: Impact and Urgency States

By default, the **Priority** field is read-only and must be set by selecting the **Impact** and **Urgency** values.

STANDARD INCIDENT NOTIFICATIONS

Notification Name	Who will receive
Incident Opened for Me	Caller ID
Incident Assigned to Me	Assigned To
Incident Assigned to My Group	Assignment Group
Incident Commented for ESS	Caller ID
Incident Commented for ITIL	Assigned To, Watch List
Incident Commented for ITIL and State Changed	Assigned To, Watch List
Incident Priority Raised	Assigned To
Incident Resolved	Caller ID
Incident Closed	Caller ID

Change Management

Change Management application provides a systematic approach to control the life cycle of all changes, facilitating beneficial changes to be made with minimum disruption to IT services.

Change Management applies a consistent approach to risk assessment, business continuity, change impact, resource requirements, and change approval.

Change Management helps to ensure changes are made in a planned and controlled manner, reduce the number of emergency changes, reduce the number of incidents caused by changes and reduce the time to process standard (repeatable) changes.

A **Change Request** allows you to implement a controlled process for the addition, modification, or removal of approved and supported configuration items (CIs).

A **Change Request** records the detailed information about the change, such as the reason of the change, the priority, the risk, the type of change, and the change category.

CHANGE MANAGEMENT ROLES

Change Requester/Change Implementer – Responsible for the creation and implementation of changes.

Process Owner – Maintains the change management process, by ensuring the process is implemented and followed by all stakeholders.

Change Manager – Responsible for day-to-day facilitation of the change management process. This role is focused on the management and administration of all changes.

CAB Manager – Facilitates the CAB meetings. (Uses the CAB Workbench to help facilitate the change management process.)

Change Advisory Board Members – A group of people who approve changes by determining if a change has been planned enough to minimize and mitigate any risk to the service. **ITIL Users can join CAB meetings where appropriate.**

CHANGE MANAGEMENT PROCESS (SUMMARY)

1. Create a change request
2. Check for conflicts
3. Calculate the risk
4. Request approval from CAB
    a. Takes place during the regular (*weekly*) scheduled CAB meetings
5. Implement the change
    a. Make the change
    b. Test the change
6. Close the change record

CHANGE MANAGEMENT STATES (SUMMARY)

New – Change is not yet submitted for review

Assess – Peer review is conducted, and technical approvals are received

Authorize – CAB provides final authorization/approval

Scheduled – Change is scheduled and awaiting implementation

Implement – The change work is being conducted

Review – Verification that the change is successful is performed

Closed – Change is closed

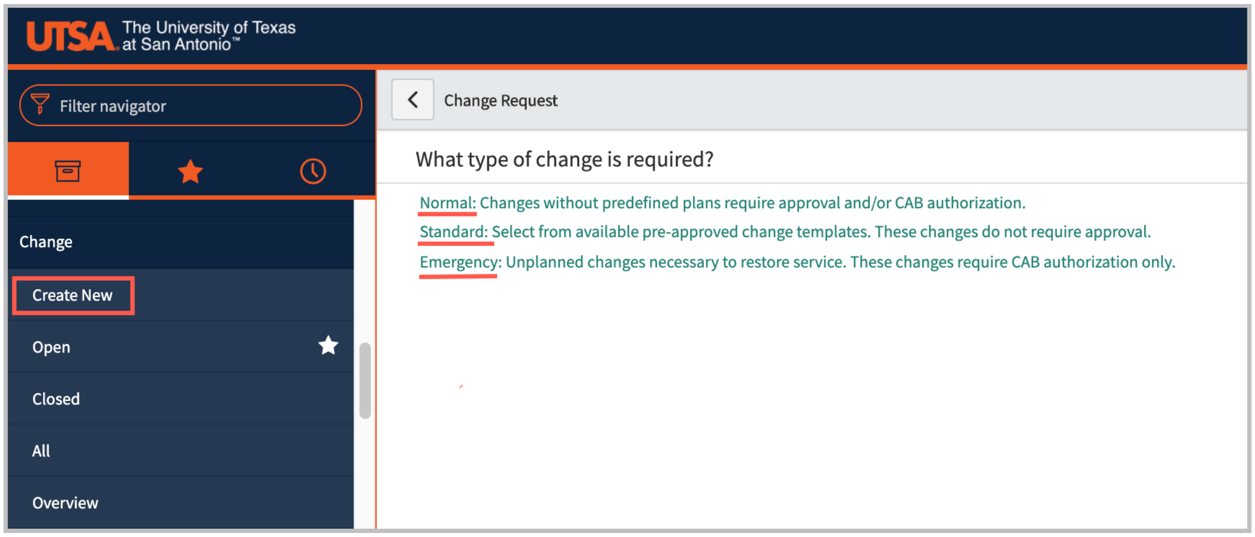
Canceled – Change is canceled

Type of Change	New	Access	Authorize	Scheduled	Implement	Review	Closed	Canceled
Normal	X	X	X	X	X	X	X	X
Emergency	X		X	X	X	X	X	X
Standard	X			X	X	X	X	X

Figure 58: State Progression

CREATE A CHANGE REQUEST

Users can create a **change request** from the **change** module.



Users can also create a **change request** from an **Incident** or **Problem**. Right-click in the header bar to open the context menu.

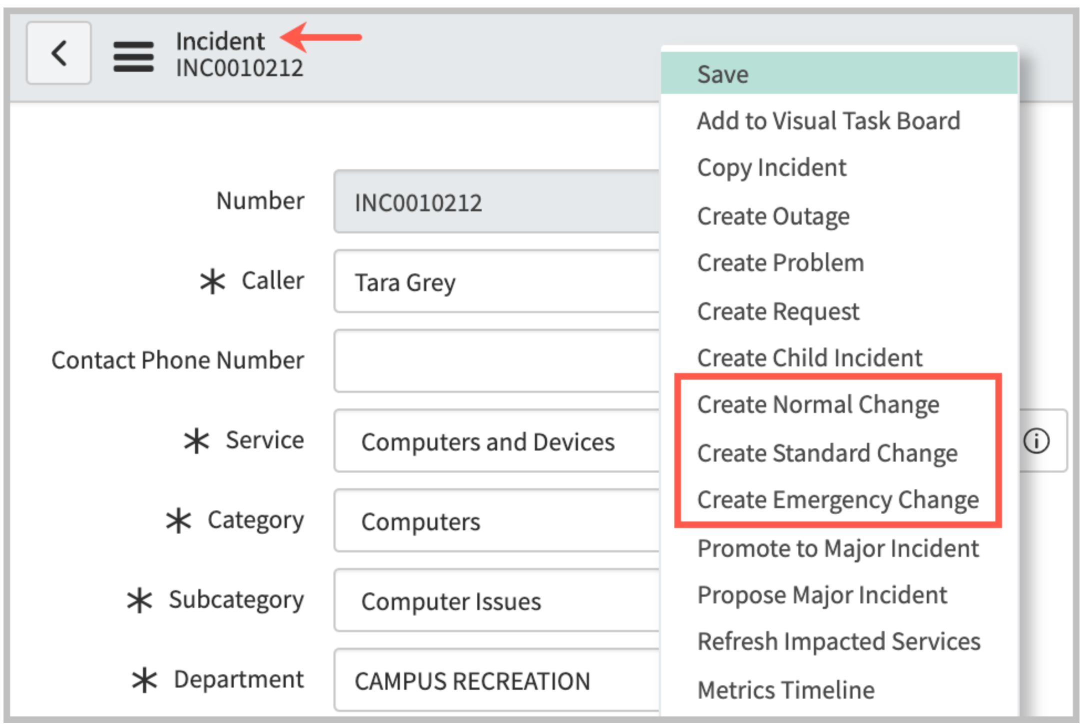


Figure 59: Create a Change Request from an Incident

There are three types of changes: **Normal**, **Standard**, and **Emergency**.

Types of Changes

Normal change

A **normal change** is any service change that is not a standard change or an emergency change.

Normal change requests follow a prescriptive process which requires two levels of approval before being implemented, reviewed, and closed.

Normal changes require a full range of assessments and authorizations such as peer or technical approval, change management, and Change Advisory Board (CAB) authorization, to ensure completeness, accuracy, and the least possible disruption to service.

Normal changes are most often scheduled outside of defined change blackout windows or during defined maintenance windows.

Normal changes are used to implement beneficial change for any change to a service that is not a standard or emergency change.

Standard Change:

A **standard change** is a pre-authorized change that is low risk, relatively common and follows a specified procedure or work instruction.

A **standard change** is one that is frequently implemented, has repeatable implementation steps, and has a proven history of success.

Because **standard changes** are pre-approved, they follow a streamlined process in which group level or peer approval and CAB authorization steps are not required.

Approved **standard change requests** can be predefined in a catalog of templates to make accessing and requesting a **standard change** more efficient. This ability also enables the Change Management team to control the changes that are authorized as standard.

Emergency Change:

An **emergency change** is a change that must be implemented as soon as possible; for example, to resolve a major incident or implement a security patch.

An **emergency change** is of such a high priority that it bypasses group and peer review and approval and goes straight to the **authorization state** for approval by the CAB approval group.

Emergency changes cover the following types of emergencies:

- Fix or fail of retroactive situations where the impact to service has already been experienced.
- Fail or fail situations where the impact to service is imminent if action is not taken.

Emergency changes do not follow the complete lifecycle of a normal change due to the speed with which they must be authorized. Therefore, they progress directly to the **authorize state** for approval from the CAB Approval group.

Normal Change Form

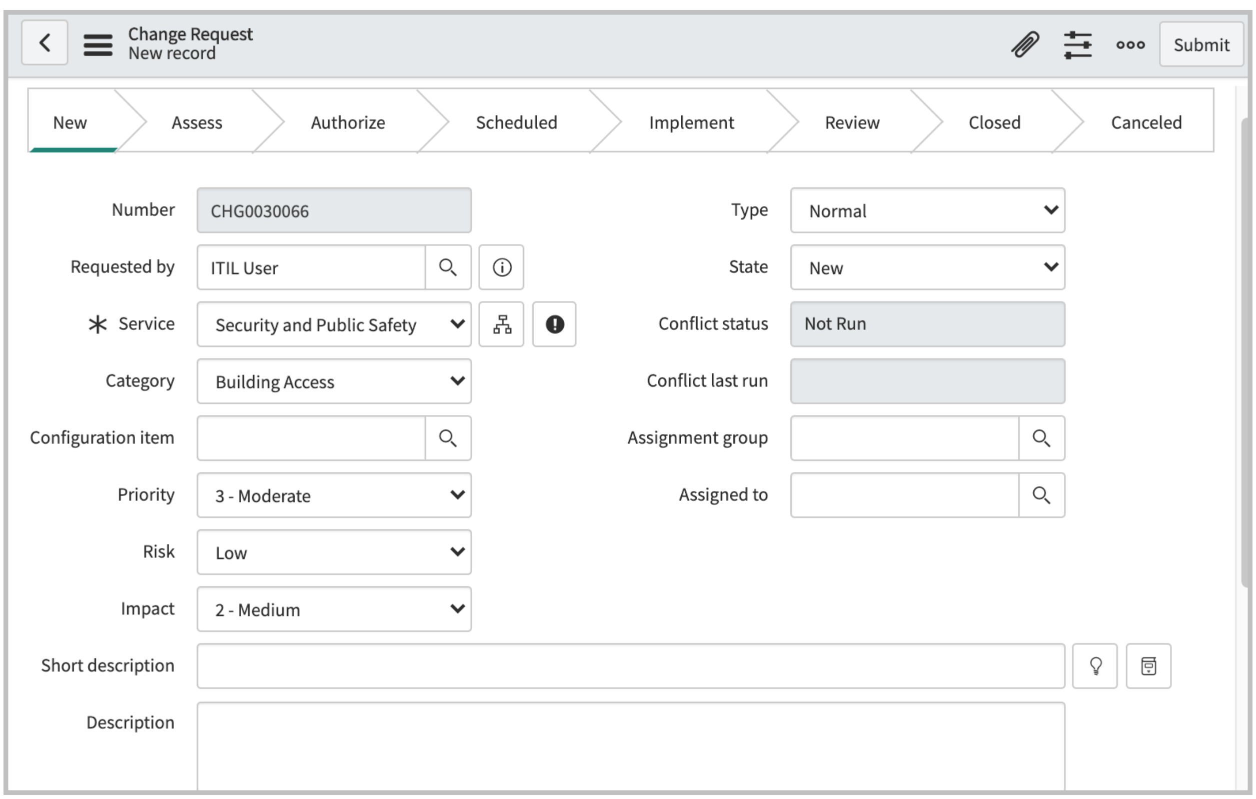
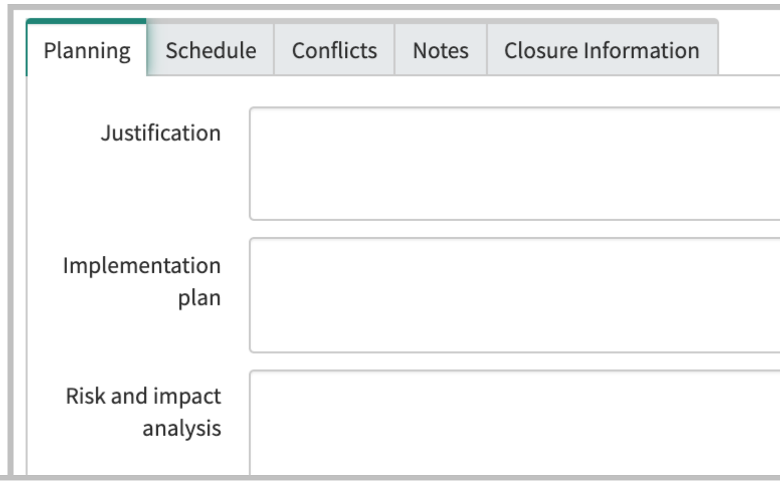
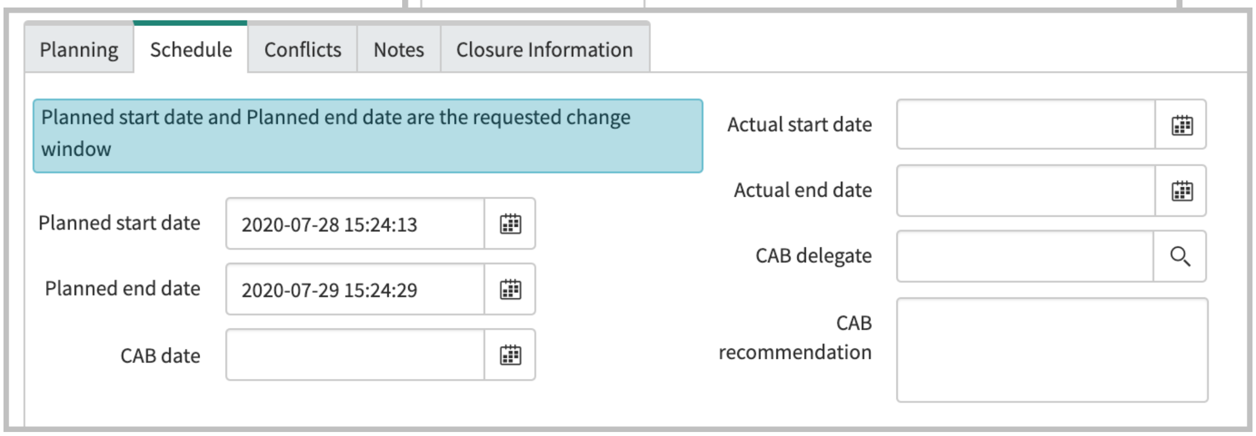


Figure 60: Normal Change Form





Change Request Form Fields

Form Fields	Content
Number	Displays the change request number
Requested By	The user who requested the change. This field is available in the change requests list view, so that you can see who requested a particular change
Category	The category of the change (e.g., hardware, network, software)
Configuration Item	Configuration item (CI) that the change applies to
Priority	How quickly the service desk should address the task
Risk	The risk level for the change (i.e., high, moderate, low). You can also use Risk Calculation and Risk Assessment to drive the risk value of the change

Impact	The effect that the task has on business
Type	The type of change request. This field is read-only
State	The state of the change request. The default state is "new"
Conflict Status	Displays whether there is a conflict for this change, or the conflict is not run
Conflict Last Run	Displays the date and the time when the conflict was last run
Assignment Group	The group that the change is assigned to
Assigned to	The user that the change is assigned to. If an assignment rule applies, the change is automatically assigned to the appropriate user or group
Short Description	A summary of the change
Description	A detailed description of the change

STANDARD CHANGE TEMPLATE LIBRARY

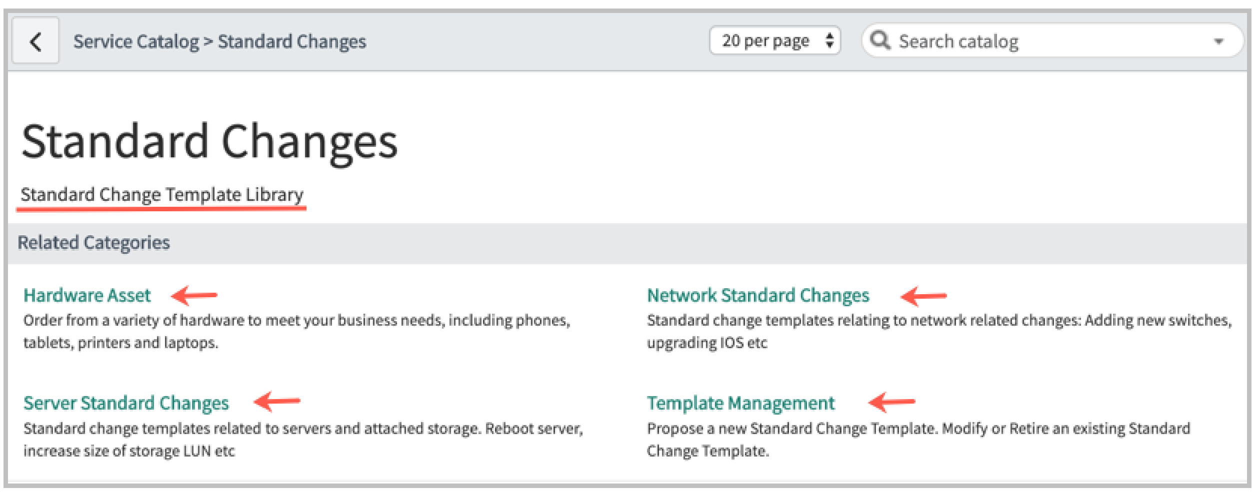


Figure 61: Standard Change Template Library

Use **Template Management** to create new standard change templates.

To create a **standard change**, fill out the change form and click **Submit**. Note that many fields are already filled out.

To create a **normal change**, fill out the relevant change form and click **Submit**.

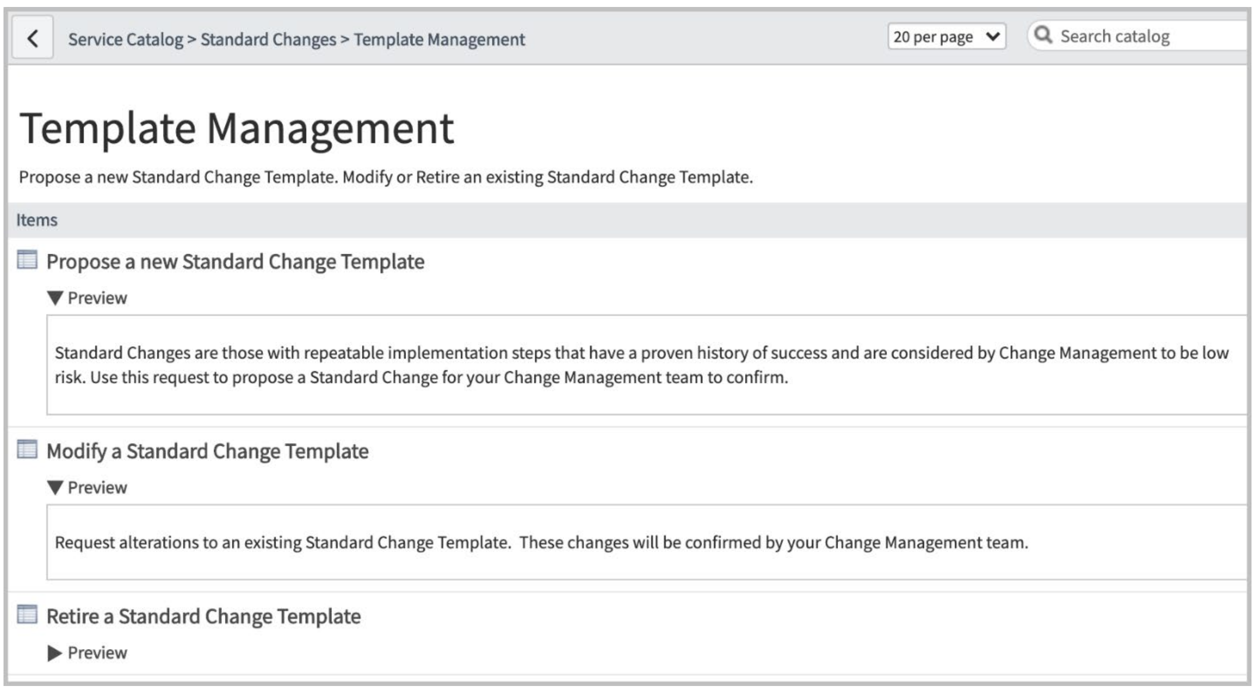


Figure 62: Template Management

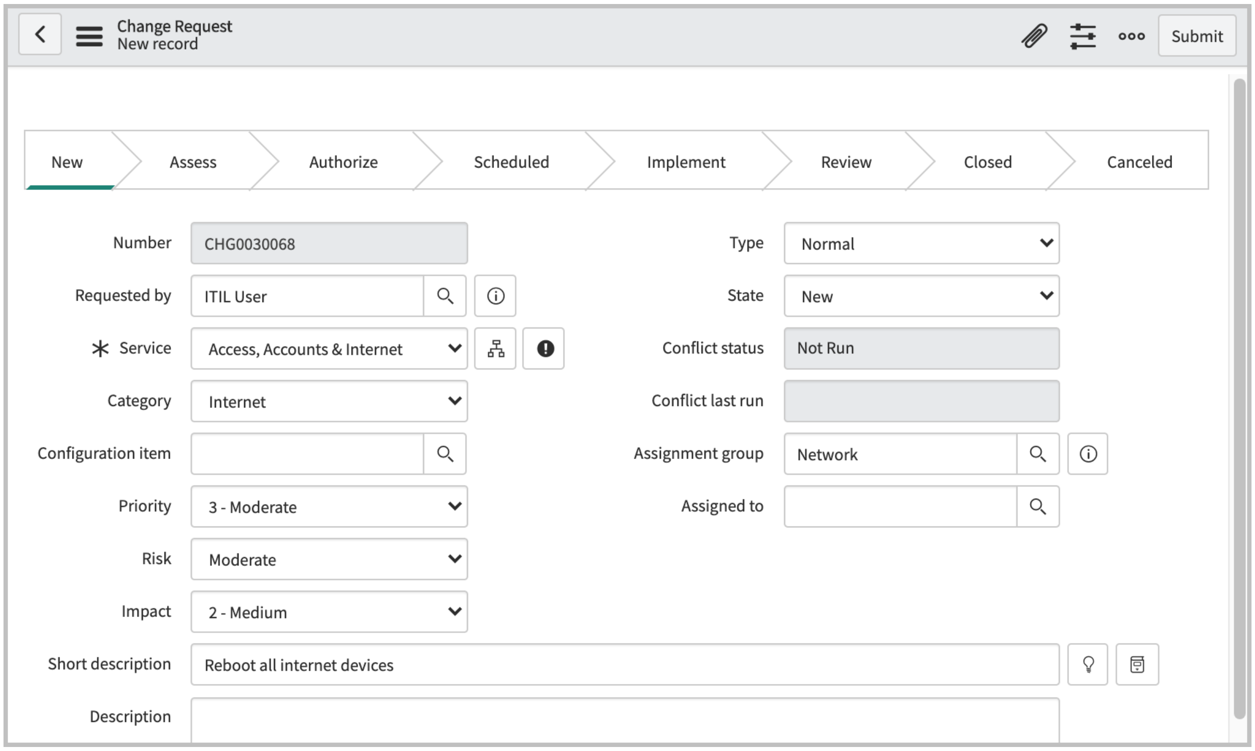


Figure 63: Normal Change Form

Then, fill out the **Planning** and **Schedule** tabs.

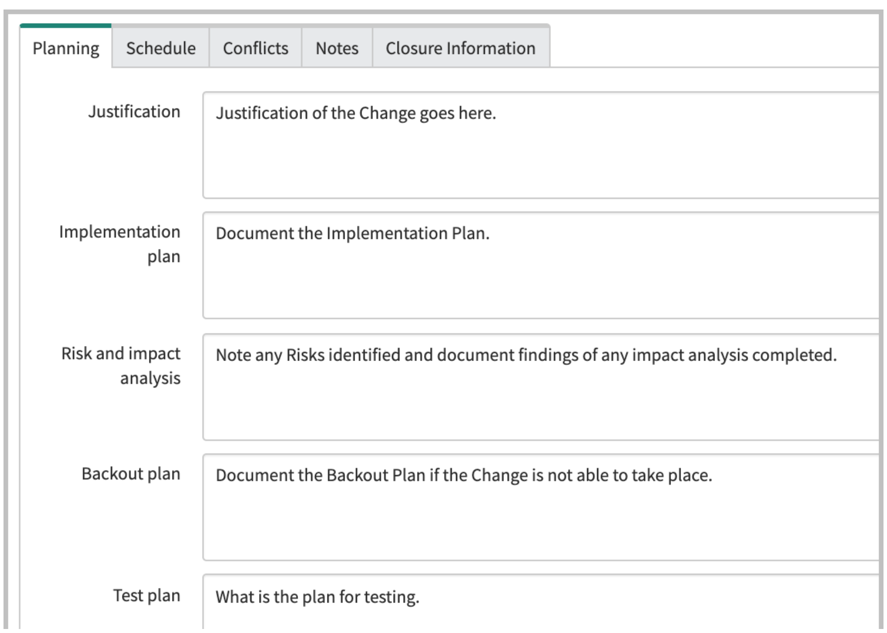


Figure 64: Planning Tab

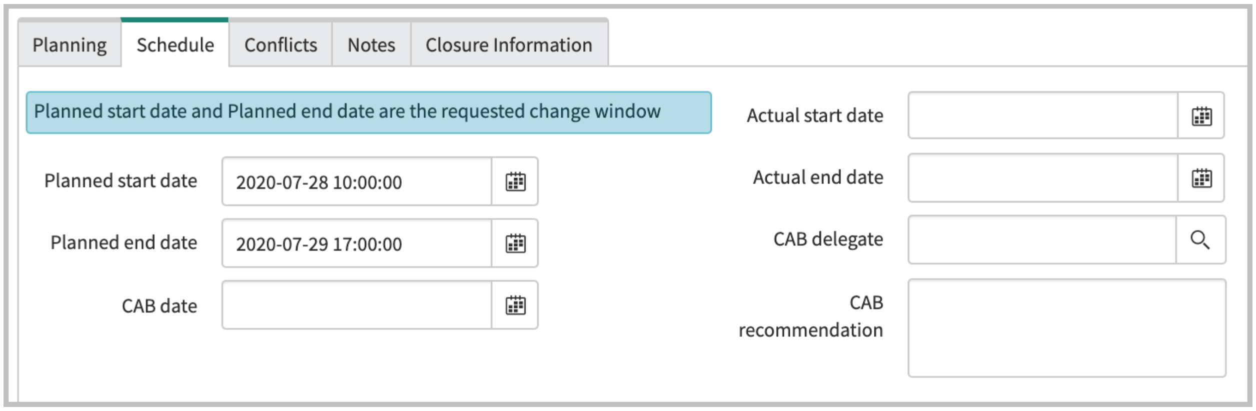


Figure 65: Schedule Tab

Checking for Conflicts

Next, check for **Conflicts**.

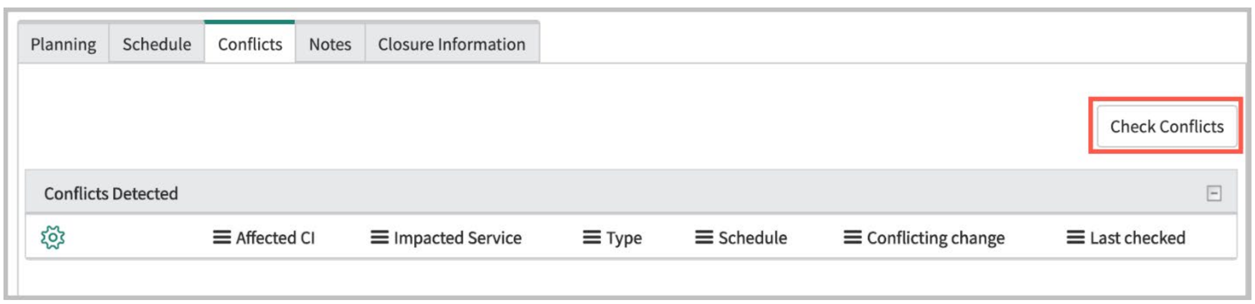


Figure 66: Check Conflicts Button

To run conflict detection, the **Configuration Item** and **Planned start** and **End dates** on the **Schedule** tab must be completed.

To check conflicts, click the **Check Conflicts** button on the Conflicts tab.

The system will check for conflicts; any conflicts detected will appear on the Conflicts tab.

Types of Conflicts:

- CI Already Scheduled
- Parent CI Already Scheduled
- Child CI Already Scheduled

- Not in Maintenance Window
- Parent Not in Maintenance Window
- Child Not in Maintenance Window
- Blackout

If conflicts are identified, the **Conflict status** field is updated to reflect a conflict and an error message directs you to the **Conflict form** section of the **Change request** form to review conflicts.

When you create a **change request** and provide a configuration item, planned start date, and planned end date or update any of those values, conflict detection is executed automatically.

To manually execute conflict detection, click the **Check conflicts** button in the Conflicts form section.

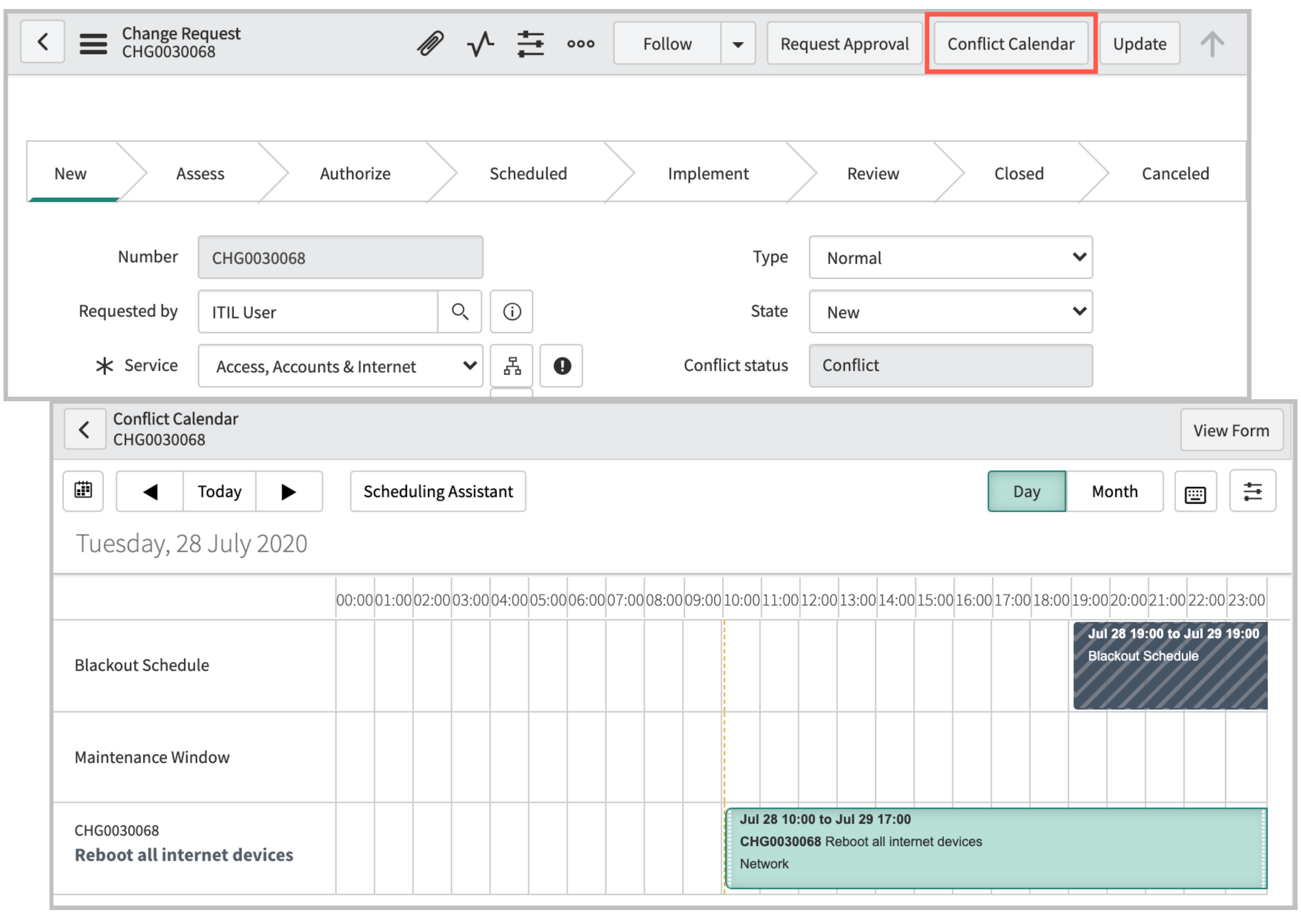
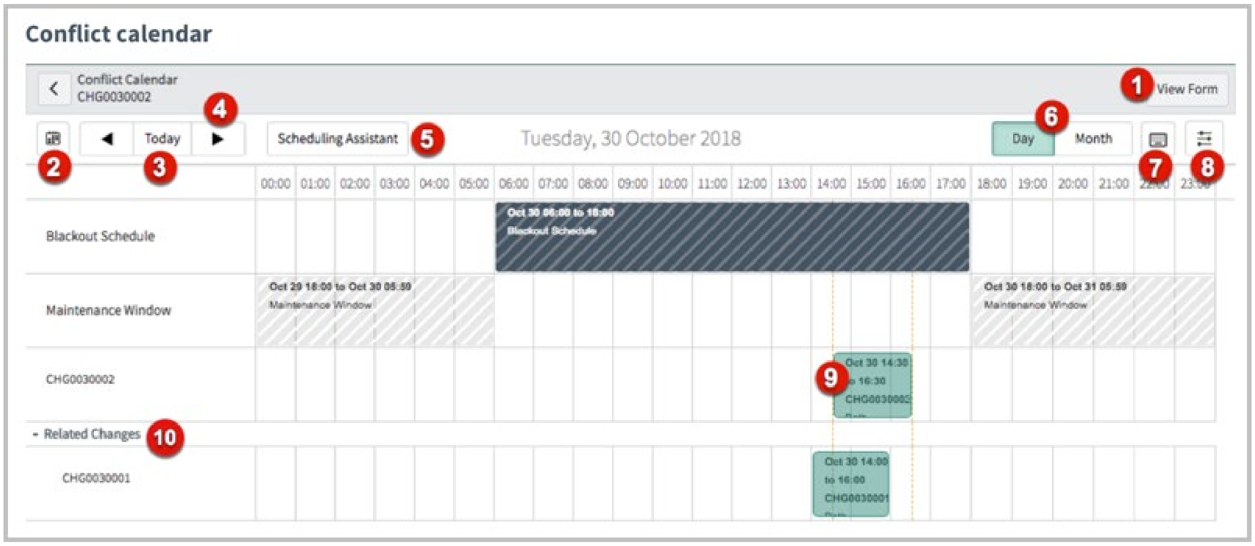


Figure 67: Conflicts Calendar



1. **View Form** - Returns to the Change Request form.
2. **Calendar** - Opens the calendar dialog to choose a date.
3. **Current Day or Month** - Click **Today** to view the current day or month.
4. **Navigating dates** - Click the arrow buttons to navigate to the previous or next day.
5. **Scheduling Assistant** - Displays the list of available time slots to choose to resolve conflicts.
6. **Day or Month view** - Change the calendar view to a day view or month view.
7. **Keyboard shortcuts** - Provides keyboard shortcuts for quick navigation.
8. **Options** - Displays the configuration filters that allows you to select and display the **Assigned to**, **Assignment group**, **Configuration item**, or **Show all** under the **Related Changes** section that has the same value of the option selected for the current change.
9. **Change request block** - Click to view the details of the change request.
10. **Related Changes** - Helps you to detect other scheduled changes that potentially conflict with the change based on a schedule or assignment. For example, if the same person is assigned to two or more changes at the same date and time, you can visually see this and update one of the scheduled changes, as appropriate.

Address a Conflict

Click **Scheduling Assistant link** to see the Change Schedule.

Change the **Planned Start Date** and **Planned End Date** to fall within the Change Schedule.

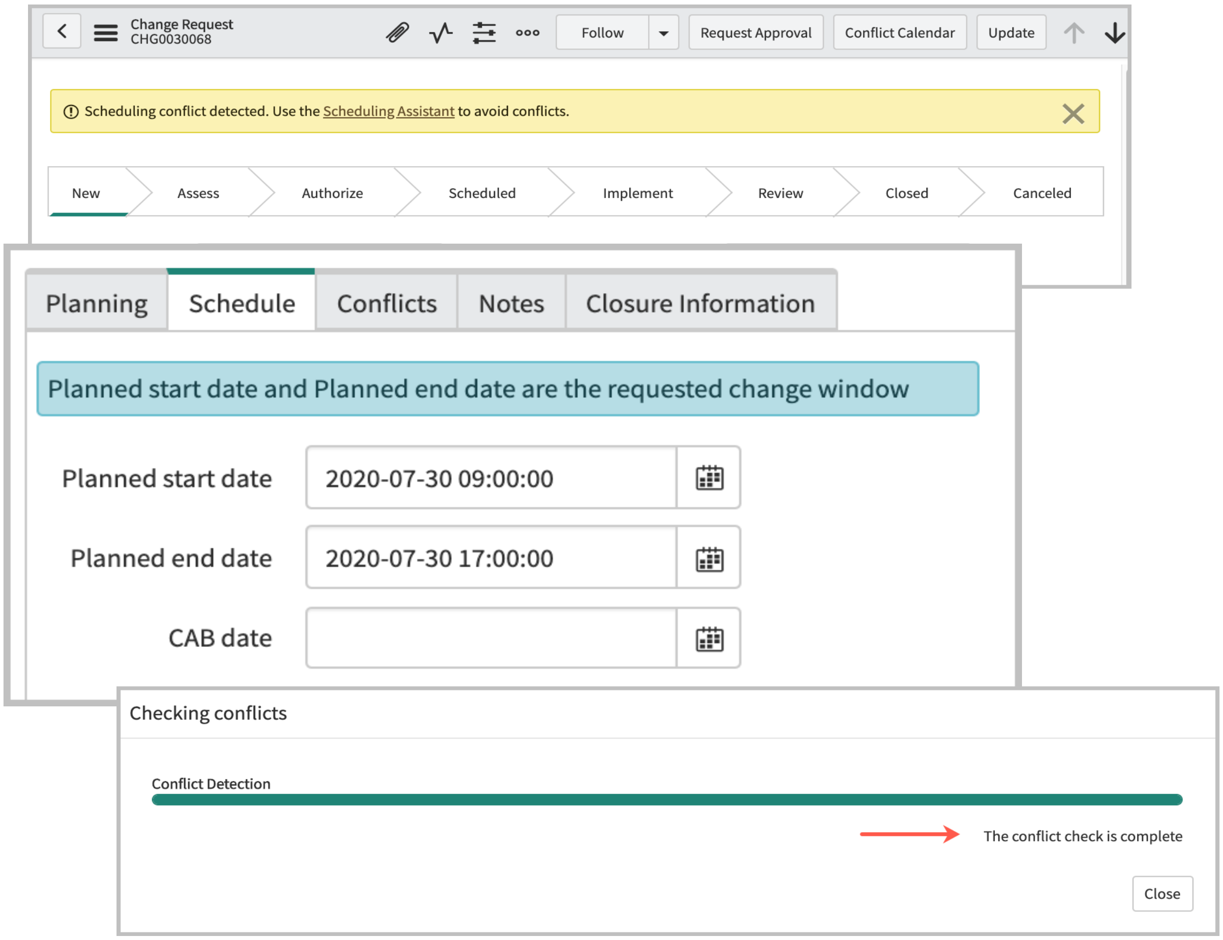


Figure 68: Conflict Check Completed

Calculate Risk

Click **Risk Assessment** under Related Links to open the risk assessment/survey. Answer the assessment questions and click Submit.

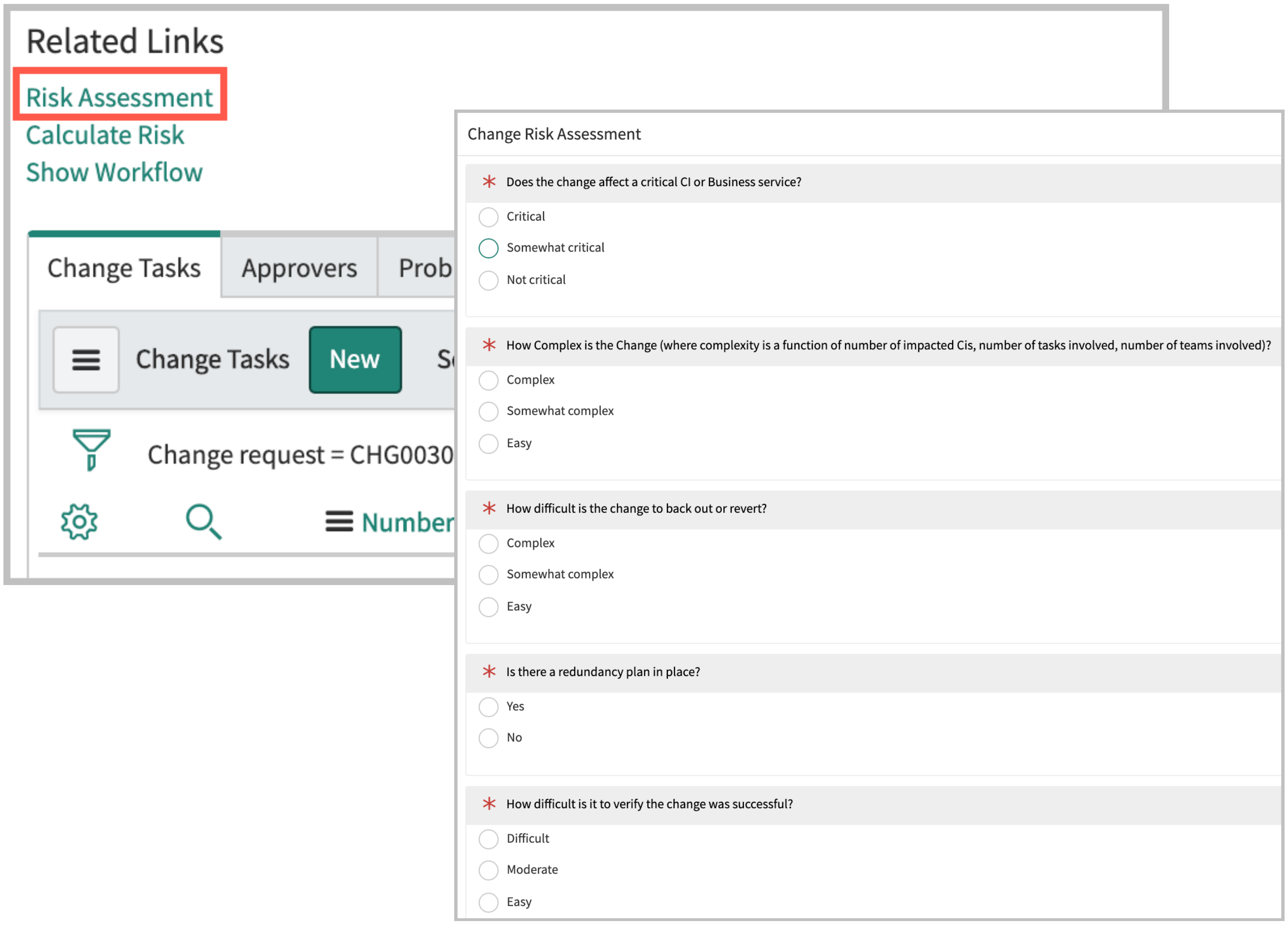


Figure 69: Risk Assessment

Based on the survey responses, the system will calculate the **Risk** and automatically change the risk field on the change record. (Note messages at top of record when assessment is submitted.)

The responses to the risk survey can be changed after the initial submission.

Users can click **Calculate Risk** at any point to have the system recalculate the risk. It will calculate the risk and impact of the change based on the related risk assessment and/or defined risk conditions.

Users can click **Calculate Risk** under **Related Links** to calculate the risk of the change without the risk assessment being filled out. (Note: if the assessment has been submitted, the system will also take the responses into account in addition to any identified Risk Conditions when calculating the risk.)

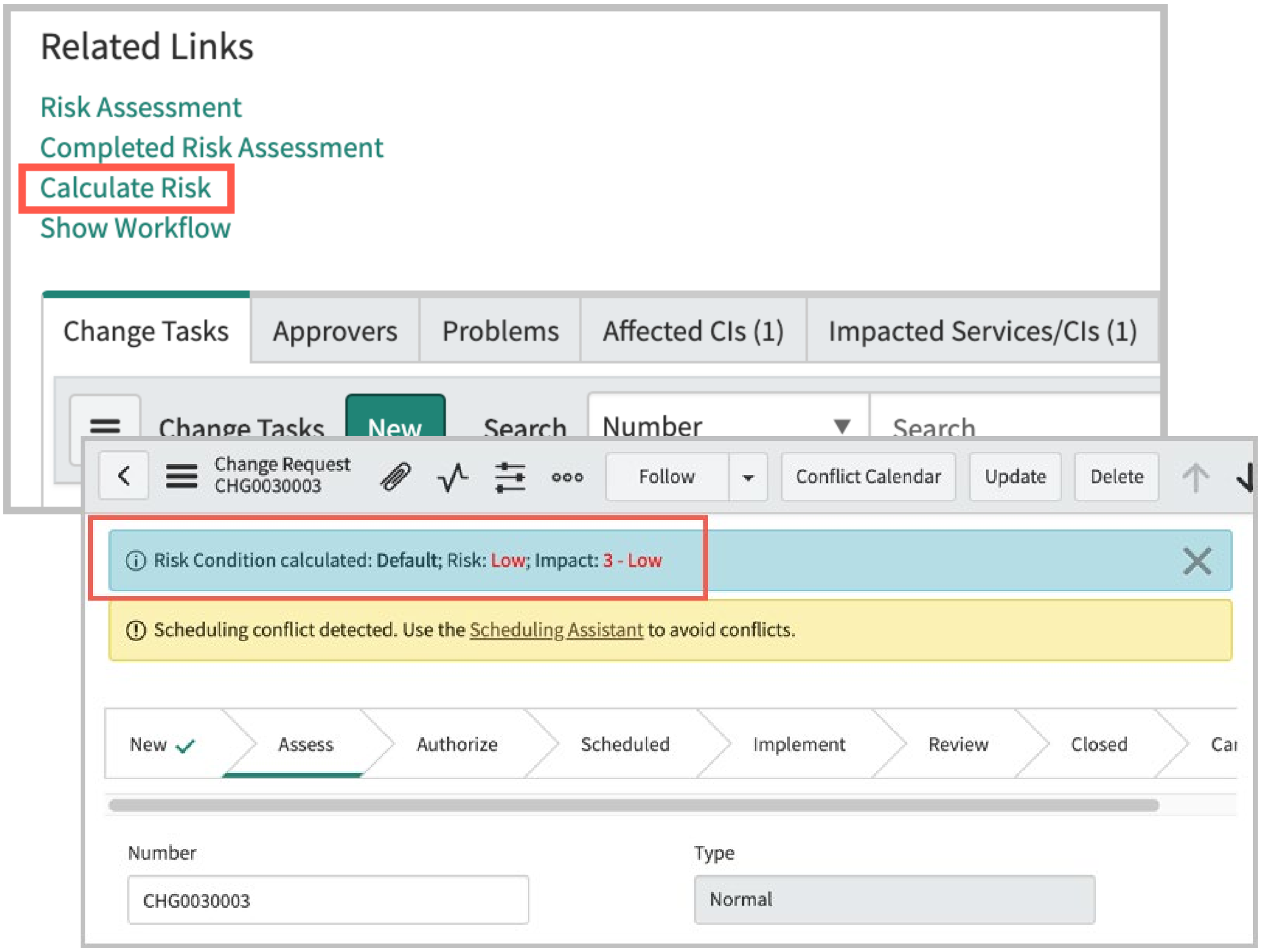


Figure 70: Calculate risk without filling out Risk Assessment

Request Approval from CAB

Click **Request Approval** to send the change to the CAB.

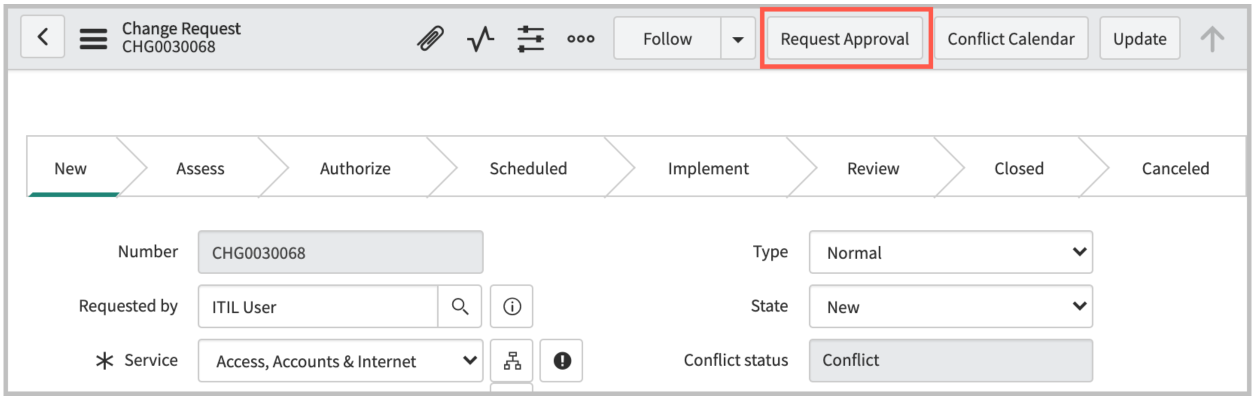


Figure 71: Request Approval Button

Note: Many fields are mandatory before you can click **Request Approval**.

Delegate Attendance to the CAB Meeting

If the person who creates the Change Request cannot make the CAB meeting, they can delegate someone else to attend in their absence via the **CAB Delegate** field on the **Schedule** tab. The attendee attends the meeting to describe the change.

CAB can place any comments or recommendations that arise during the CAB meeting related to the change in the **CAB Recommendation** field.

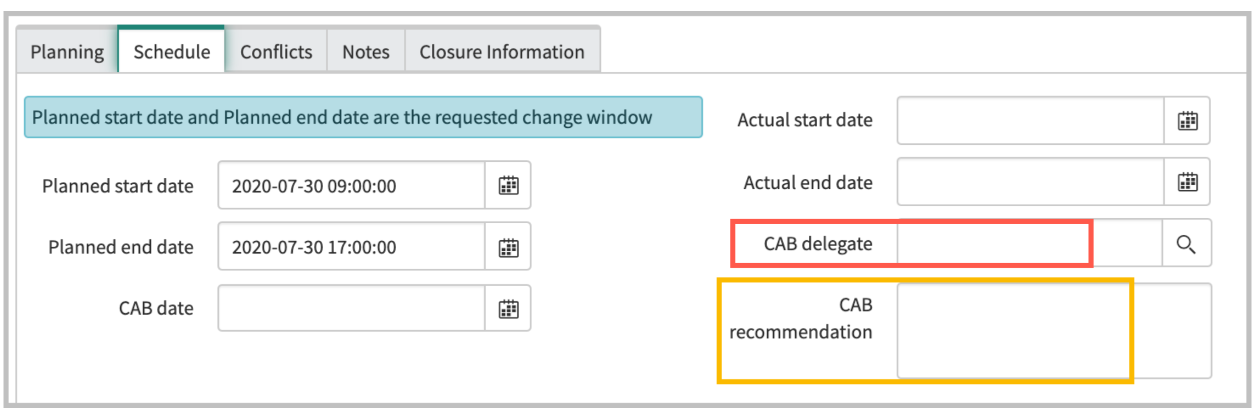


Figure 72: CAB delegate and recommendation fields

CHANGE REQUEST APPROVAL

1. First approval in the change workflow is requested from 1 person in the **Assignment Group**.
2. The second approval in the workflow is requested from 1 or more **CAB members**.

When a **Normal Change** is fully approved, the **state** moves to **Scheduled**.

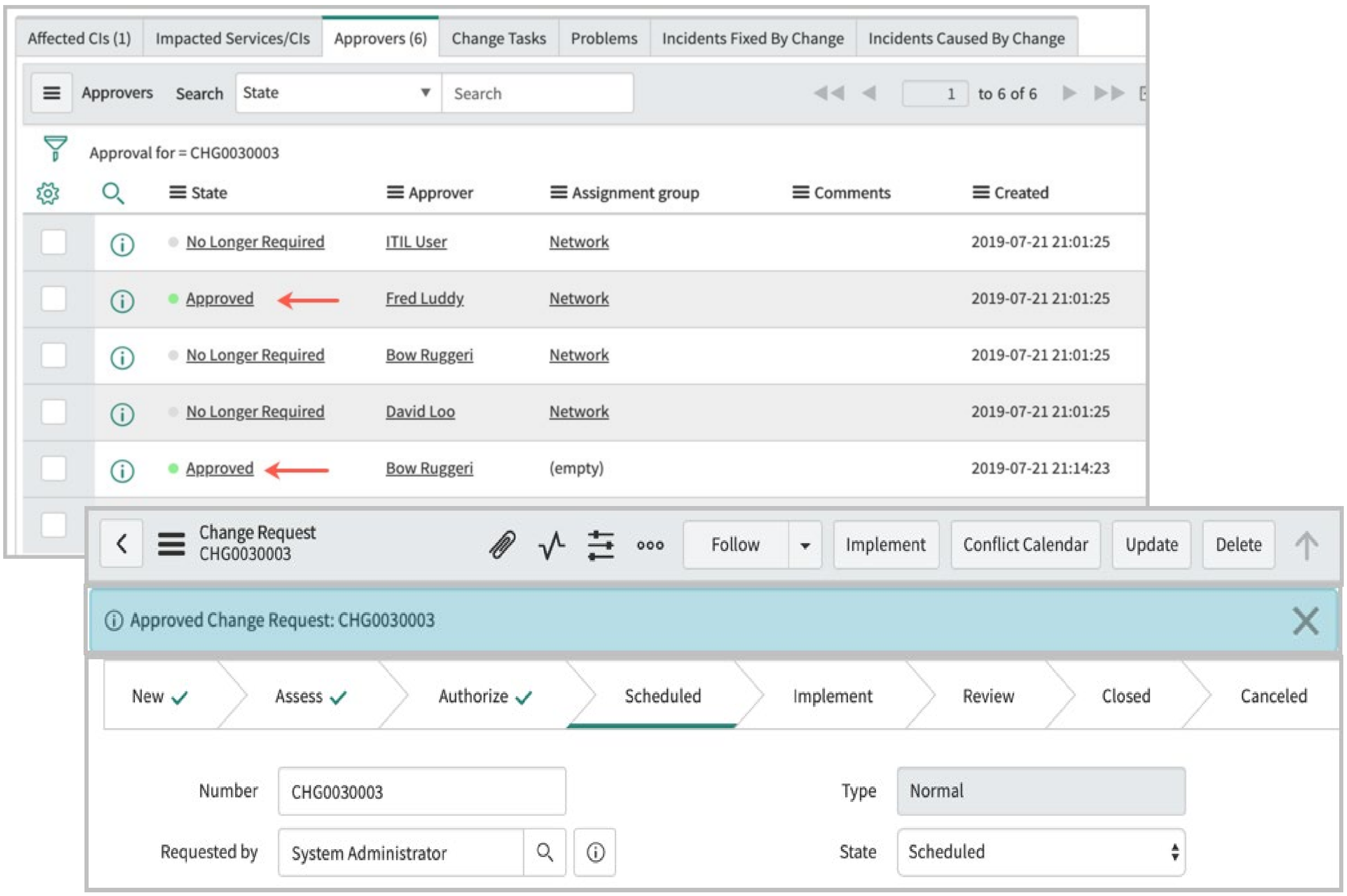


Figure 73: Normal Change Request Approved and Scheduled

PUT A CHANGE ON HOLD

A Change can be put on hold by checking the **On Hold** box and adding an explanation for the reason.

You can put a change request On Hold when it is <u>not</u> in the **New**, **Canceled**, or **Closed** state.

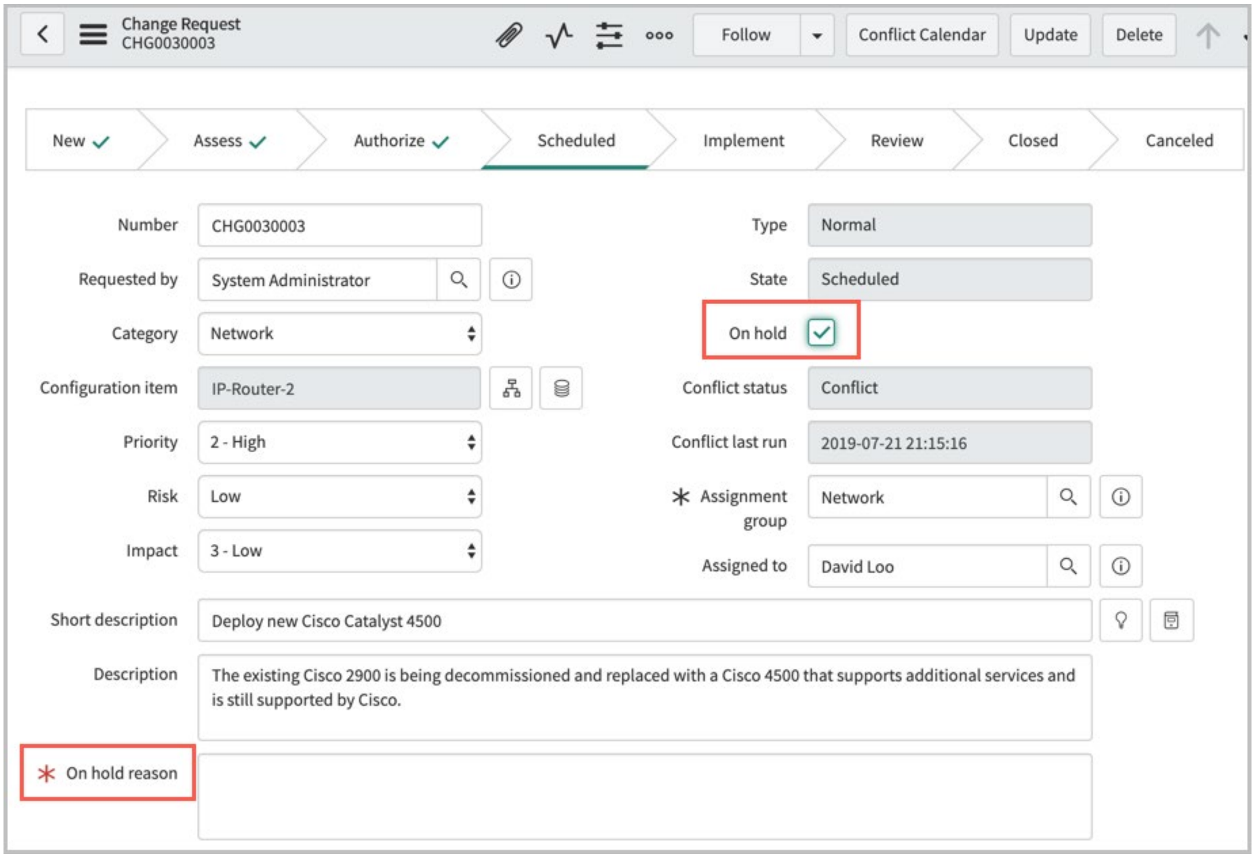


Figure 74: How to put a change request on hold

Important Details:

Change tasks inherit some state conditions from the parent change request they are related to. When a change request is placed on hold, these conditions are applied to it:

- If the change is waiting for approval, the pending approvals are marked **No Longer Required**. When the change request is no longer **On Hold**, the pending approvals are reinstated and are **Awaiting approval**.
- The change can progress only to the **Canceled** state while it is **On Hold**.

- If a change request is canceled while it is **On Hold**, then its **On Hold** flag is set to **false** so the change cannot be canceled and still be **On Hold**.
- If the change request is set to **On Hold**, the value of the **On Hold** field for all the active change tasks for that change request is set to and the **On Hold** reason is copied from the change request to the change tasks.
- If you clear the **On Hold** check box in a change request, the **On Hold** field for all the active change tasks for that change request is set to **false** and the **On Hold** reason is cleared from the change tasks.
- If the **change request** is canceled, all the active change tasks related to that change request are also canceled.
- A **change request** can only be closed when all the active change tasks related to that change request are closed or canceled otherwise a pop-up appears notifying that there are open change tasks that require to be closed.
- If there are existing change tasks that are manually placed on hold, those change tasks **do not** get overwritten when the change request is placed to the **On Hold** state. Similarly, when the change request is taken off the hold state, the change tasks that were placed on hold manually stays in the **On Hold** state.

IMPLEMENT THE CHANGE

When ready to implement the change, click **Implement**. This puts the **change request** into action. The workflow then creates two **change tasks**: **Implement** and **Post-Implement testing.** Review the change tasks and assign them to a user or group, as appropriate.

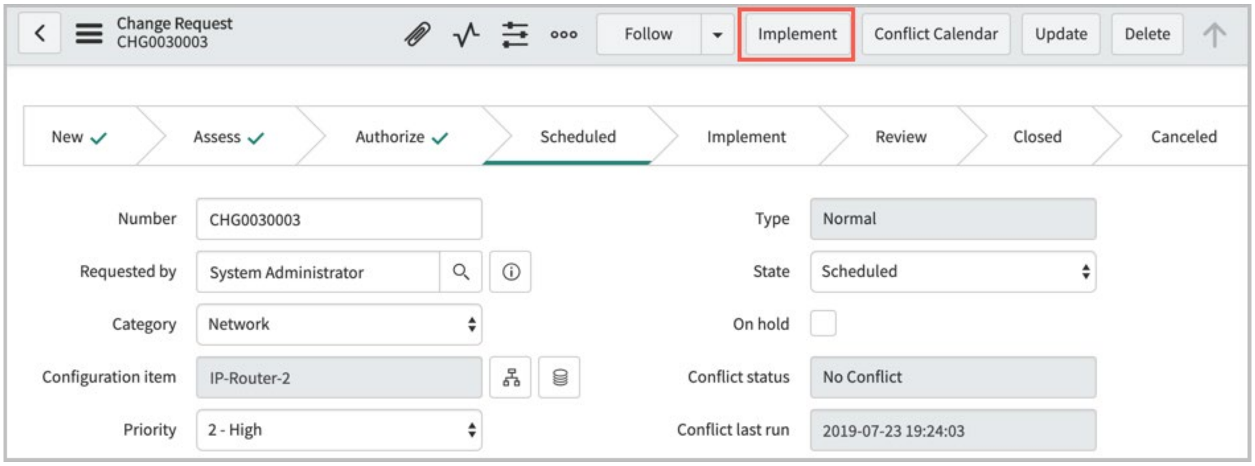


Figure 75: Implement a change

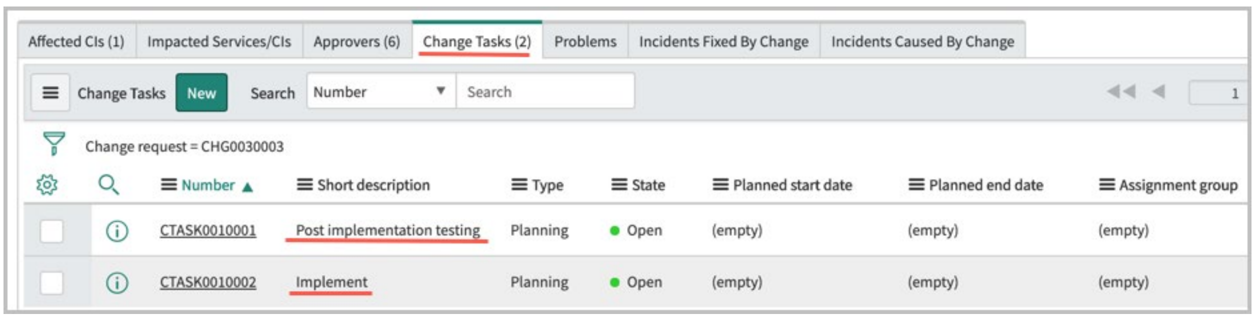


Figure 76: Change Tasks (Implement & Post-Implementation testing)

Click **Review** after reviewing all **change request** details. This moves the request to the **Review State**. Note: When the **change request** is moved to the review state, all open change tasks (if any) are set to **canceled**.

Close the Change

When the change is complete, fill in the two mandatory fields (**close code** and **close notes**) and click the **close** button.

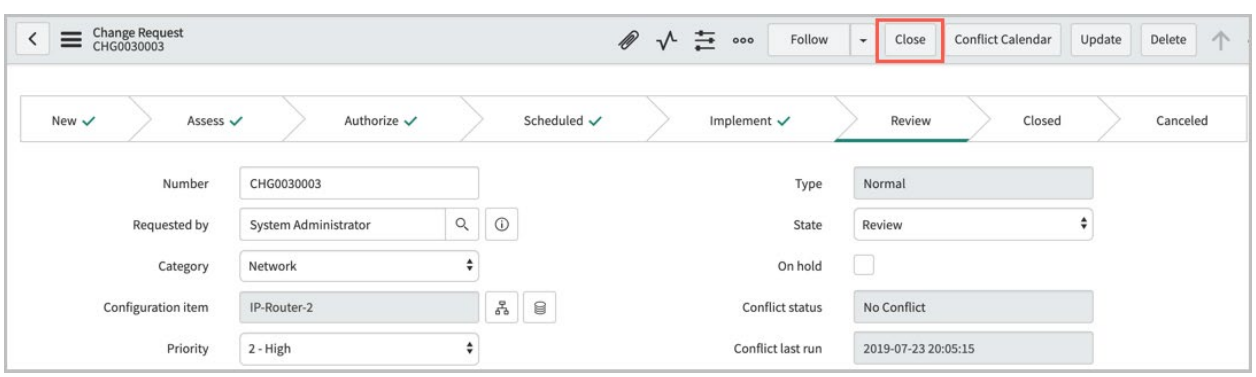


Figure 77: Close button

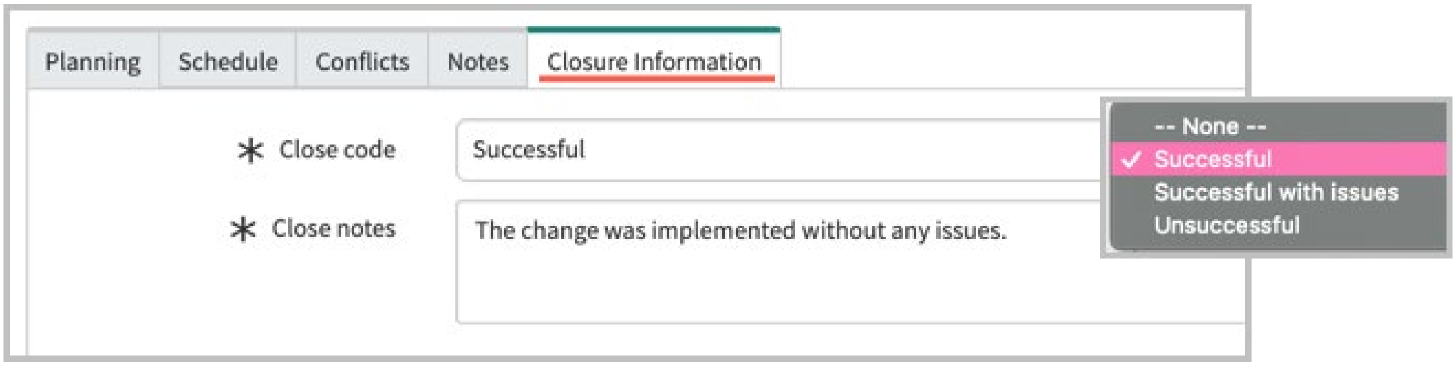


Figure 78: Closure Information

CHANGE NOTIFICATIONS

Name	Who will receive
Change Approved	Assigned To
Change Rejected	Assigned To
Change Assigned to My Group	Assignment Group
Change Assigned to Me	Assigned To
Change Task Assigned to My Group	Assignment Group
Change Task Assigned to Me	Assigned To
Change Worknoted	Assigned To, Work Notes List
Unscheduled Change	Owned By, Managed By, Change Control
Change Commented (to assignee)	Assigned To, Work Notes List
Change Commented (unassigned)	Assignment Group, Work Notes List

CAB WORKBENCH

The Change Advisory Board (CAB) workbench enables a CAB manager to schedule, plan, and manage CAB meetings as well as to automate manual tasks.

CAB meetings are typically intended to review and authorize change requests and review recently implemented changes. A standard agenda with the relevant change request details enables the CAB members to conduct risk and impact analysis prior to the CAB meeting.

KNOWLEDGE MANAGEMENT

The ServiceNow® Knowledge Management (KM) application enables the sharing of information in **knowledge bases**. These knowledge bases contain articles that provide users with information such as self-help, troubleshooting, and task resolution.

Knowledge bases are often organized by company departments (IT, HR, Facilities, Marketing) and can also be organized by internal users of a department and external users.

Knowledge Management can increase efficiency and improve customer service by allowing employees to get the information they need when they need it (self-service).

Knowledge Management supports processes for creating, categorizing, reviewing, and approving articles. Users can search and browse articles as well as provide feedback.

To support multiple groups, **knowledge bases** can be assigned to individual managers. Separate workflows can be used for publishing and retiring articles, and separate access controls can be used to control reading and contributing.

Note: **End users** access the **knowledge base** from the **portal**, while **ITIL Fulfillers** access the **knowledge base** from the **Frameset.**

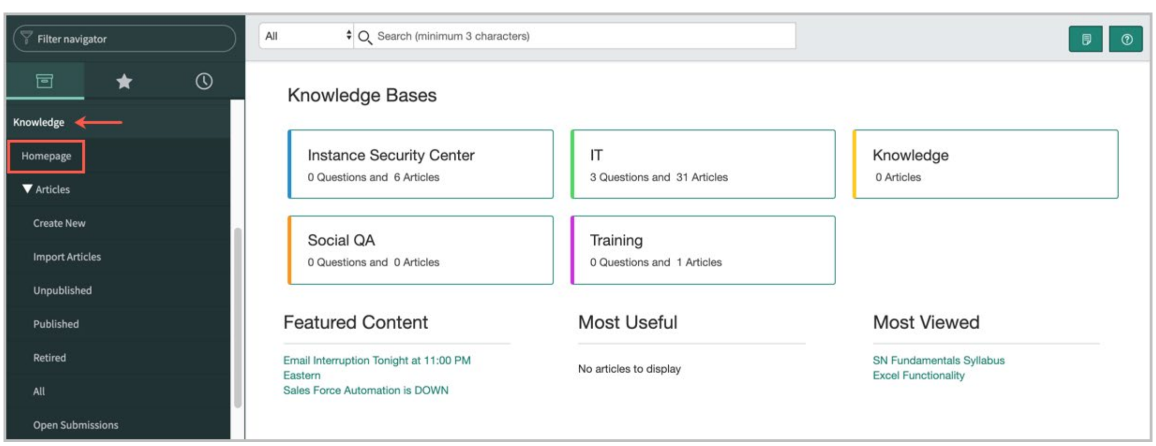


Figure 79: Knowledge Base Homepage

CREATE A KNOWLEDGE ARTICLE

A Fulfiller can create a Knowledge article via the **Create New** module within the Knowledge application. All users with at least one ServiceNow role can create and edit knowledge articles.

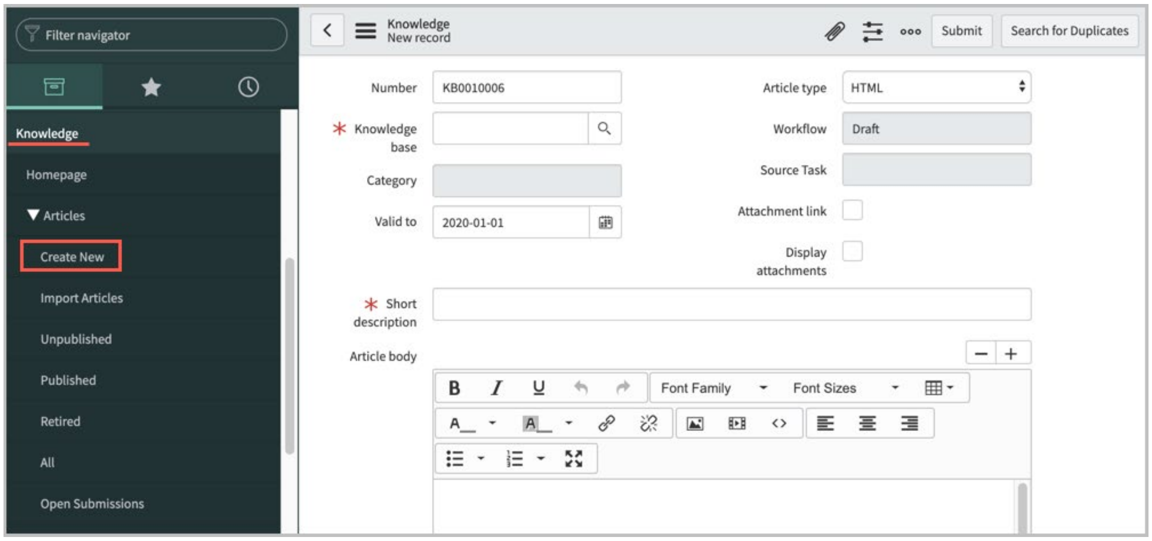


Figure 80: Create New Knowledge Article

Before creating a new article, make sure there is not already an article on the same topic by clicking the "Search for Duplicates" button.

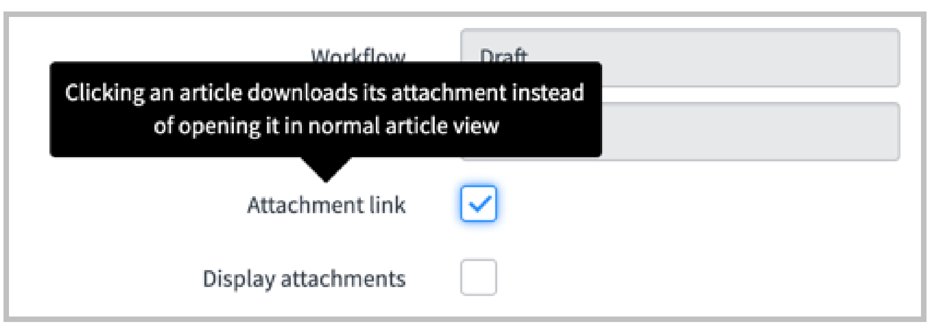


Figure 81: Select the Attachment Link box to download the attachment upon opening the article

The **Short Description** becomes the title of the Knowledge Article.

Once you click "submit," a draft of the article is created and is in the **Unpublished** module.

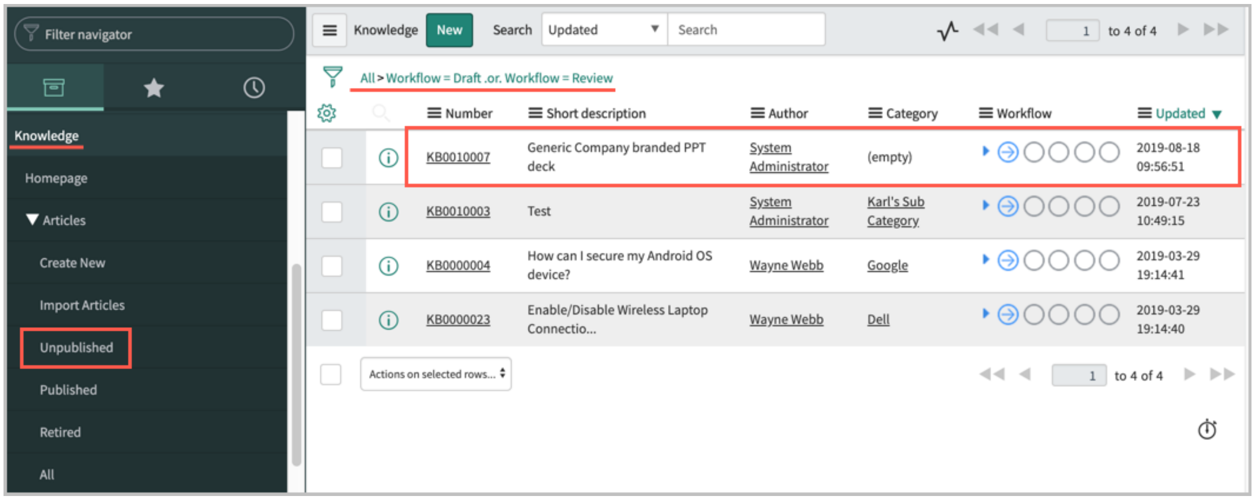


Figure 82: an unpublished article

Next, open the **draft article** and click **Publish** to move it to the next stage: **approval state**. Note: clicking "publish" does not publish the article to the **knowledge base**— only to the **approval state**.

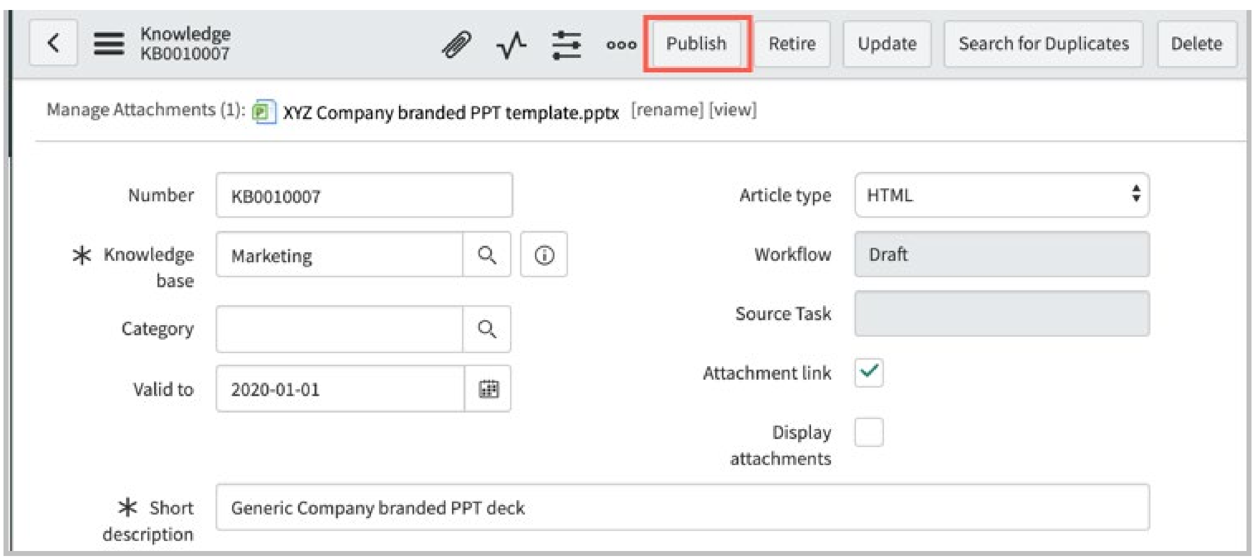


Figure 83: Publishing an article to the Approval State

Once the article is approved, it can be accessed in the **Publish** module and is available for end users to search/access the article from the **Portal** page (provided they meet the **User Criteria** established for the **Knowledge Base**). Users can only search for and view **published** articles.

User Criteria is the method by which fulfillers can establish who can and cannot access a **knowledge base**.

User Criteria can be established by users, groups, roles, companies, locations, and/or departments.

User criteria can only be set by **knowledge managers** or **administrators**.

Attaching a File to a Knowledge Article

To attach a file to a knowledge article, use the paperclip icon and click **Submit**.

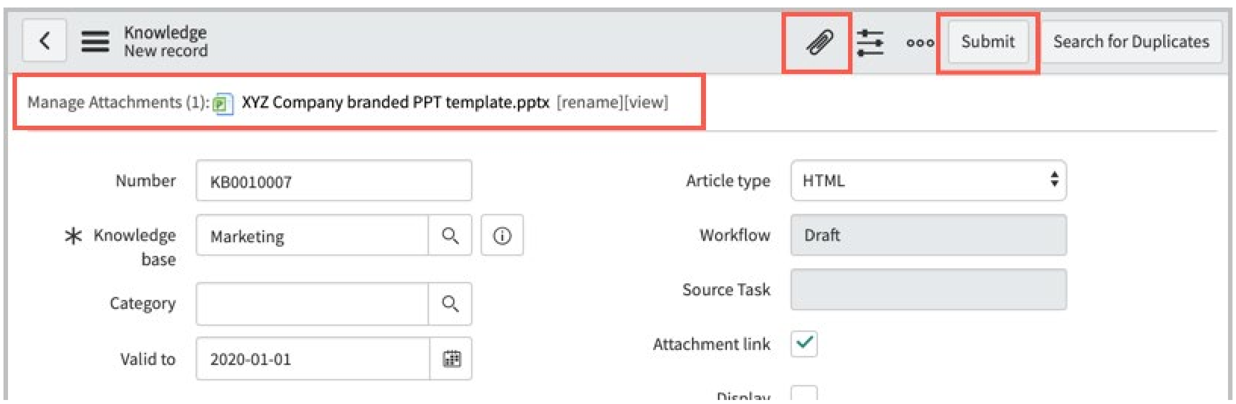


Figure 84: Attaching files to knowledge articles

If you want to open the article without automatically opening the attachment, click the **Display Attachment** box.

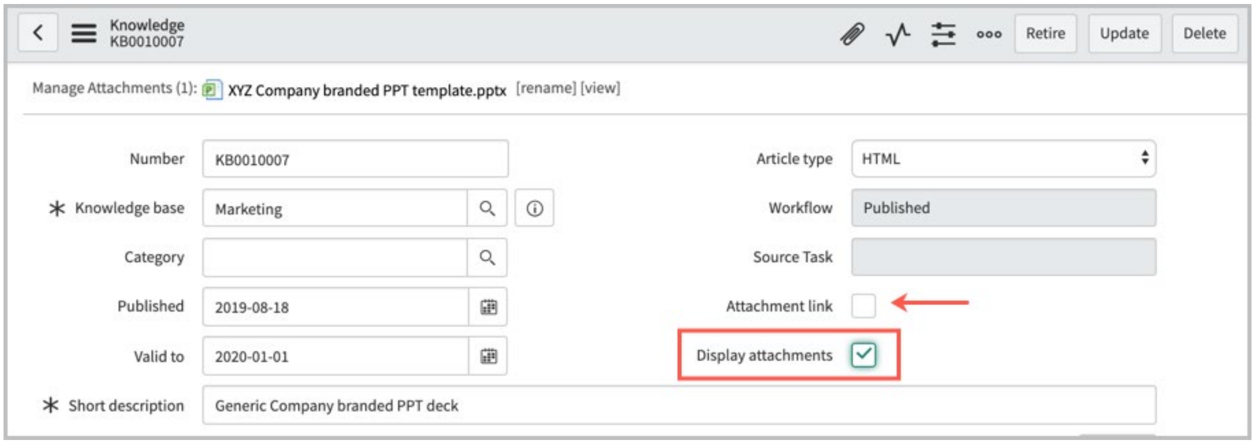


Figure 85: Display but not automatically download an attachment

CREATE KNOWLEDGE ARTICLES BY IMPORTING WORD FILES

Word documents can be imported to the body of a **knowledge article.** To upload a Word document, click the **import articles** module, fill out the form, add the file(s) and click **import**.

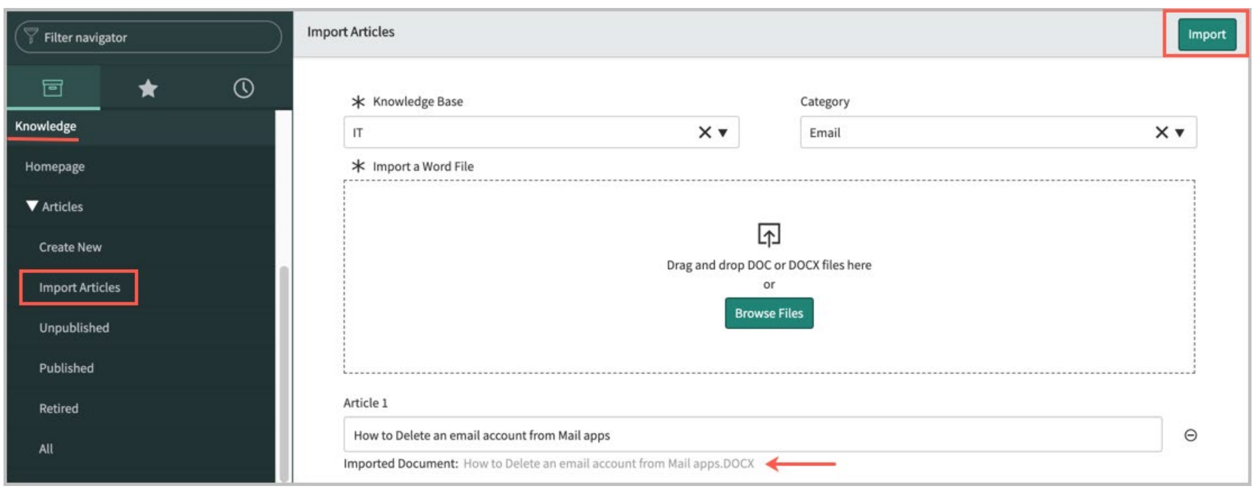
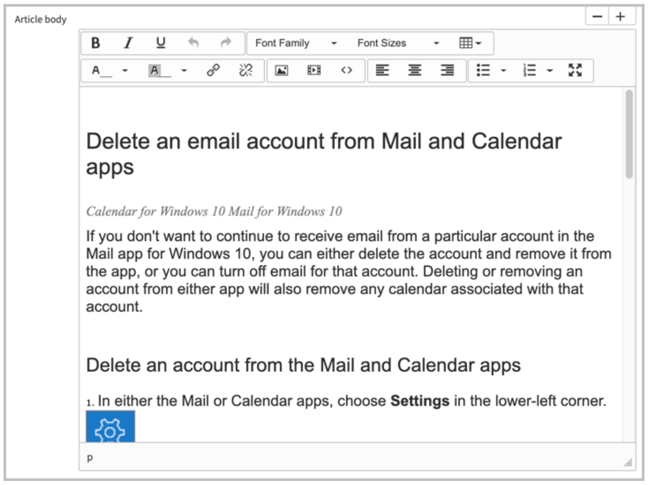


Figure 86: Importing a Word Document to the body of a Knowledge Article

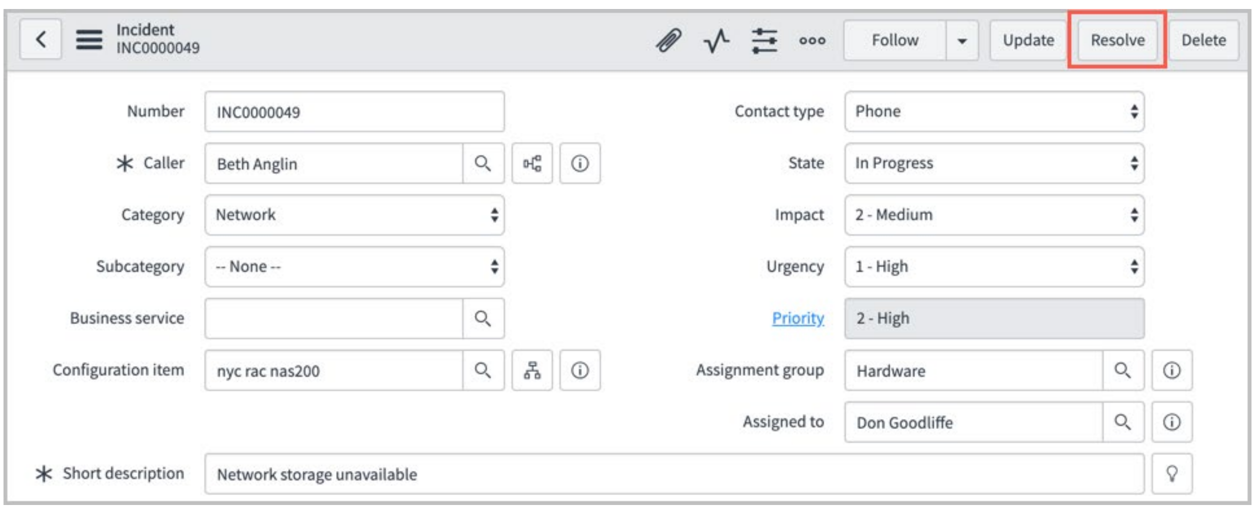


The imported Word file becomes a **draft knowledge article** that follows the same knowledge article **workflow** for the specified **Knowledge Base**.

Create an Article from an Incident or Problem

A **Fulfiller** can create a knowledge article when *resolving* an **Incident** or **Problem** so that next time the issue comes up, the resolution is defined and available.

The Incident Short Description becomes the title of the **article**.



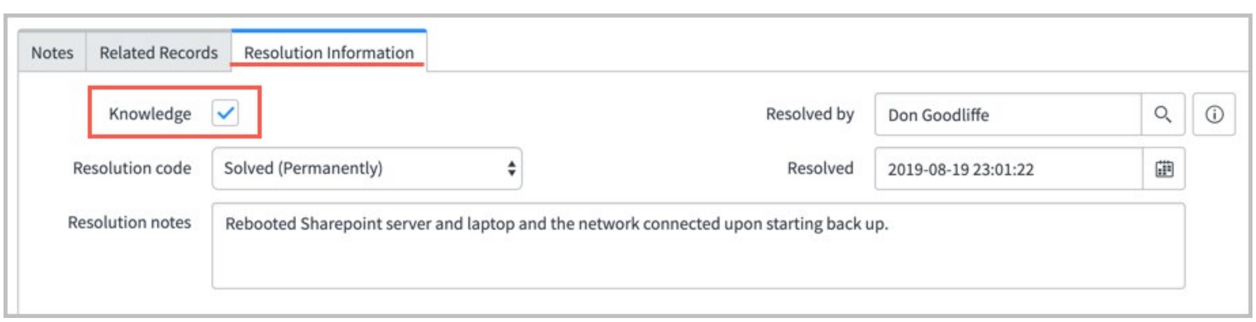


Figure 88: Click the Knowledge check box to create a draft knowledge article

The **additional comments** from the **Incident** form go to the body of the **article**.

For detailed information on creating knowledge from an incident, refer to https://docs.servicenow.com/bundle/paris-it-service-management/page/product/itsm-workspace/task/create-knowledge-article-workflow.html

The newly created draft article can be accessed from the **Unpublished** module of the Knowledge application.

The article can be reviewed, edited and **Published for Approval**, then published to be made available to the users who match the **User Criteria** of the **Knowledge Base**.

Fulfillers can use a **knowledge article** to create an **incident** when viewing that **knowledge article** from the **frameset**.

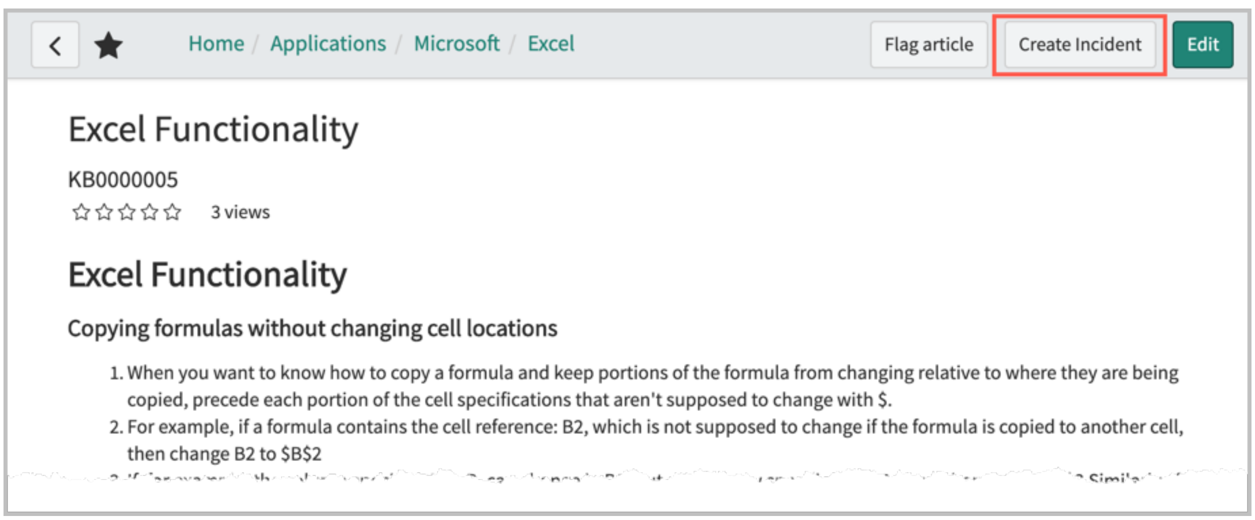


Figure 89: Create an incident from an article in the frameset

KNOWLEDGE MANAGEMENT PROCESS

1. Create a **knowledge article** and click **Submit** to move it to the next stage in the knowledge **workflow**.
2. Once submitted, the article can be found in the **unpublished** module.

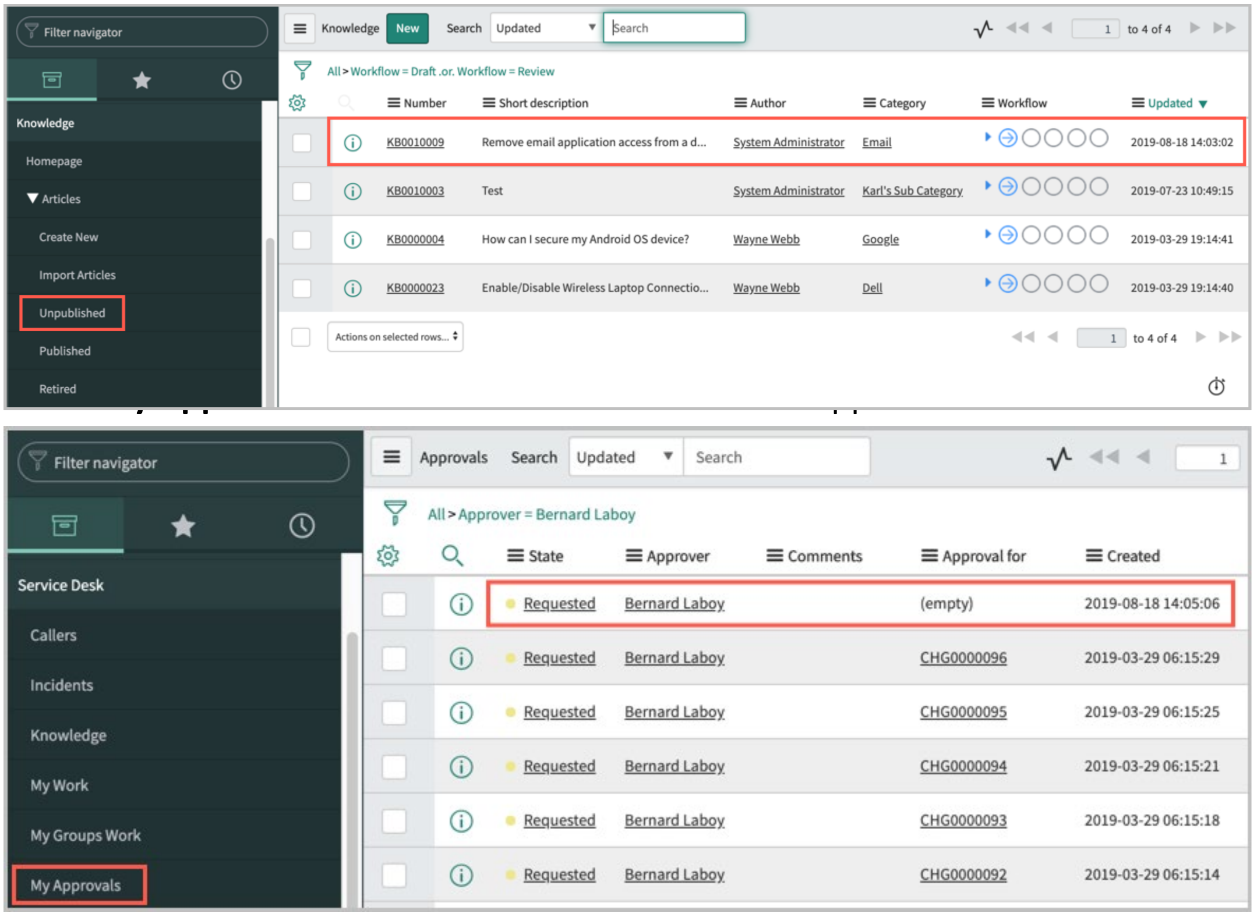


Figure 91: My approvals module

5. The **Knowledge Base Owner/Manager** will open the **Approval Request**, review, and click the respective button to **Approve/Reject** the article.
6. When the article is approved by the **Knowledge Owner/Manager** the article **workflow** state will change to **published**.

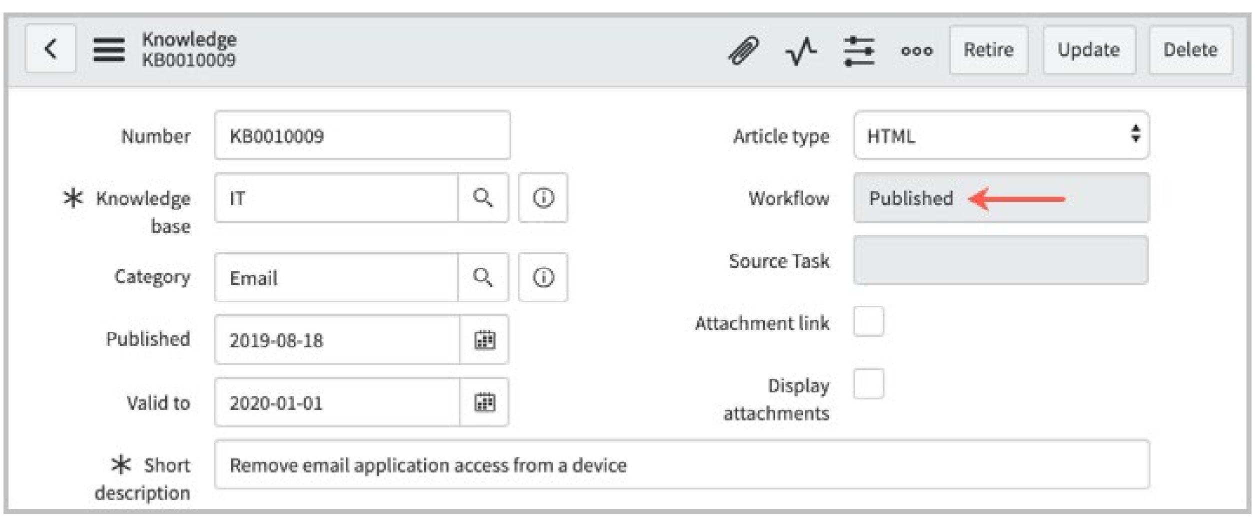


Figure 92:Published workflow state

Updating Articles/Article Retirement

When applicable, the author of the article will click **Retire** to retire the article. The **Knowledge Owner/Manager** will need to approve the retirement of the article.

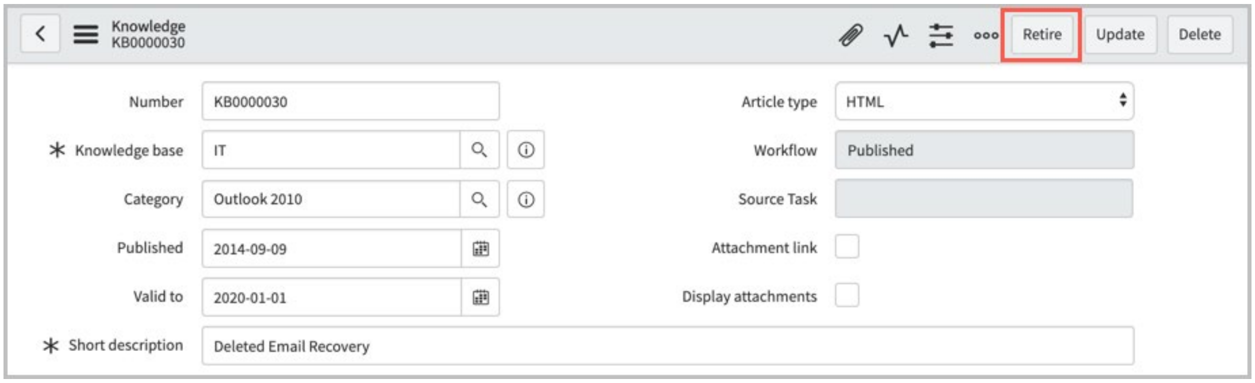


Figure 93:Retiring an article

All retired articles are located in the **Retired** module of the Knowledge application.

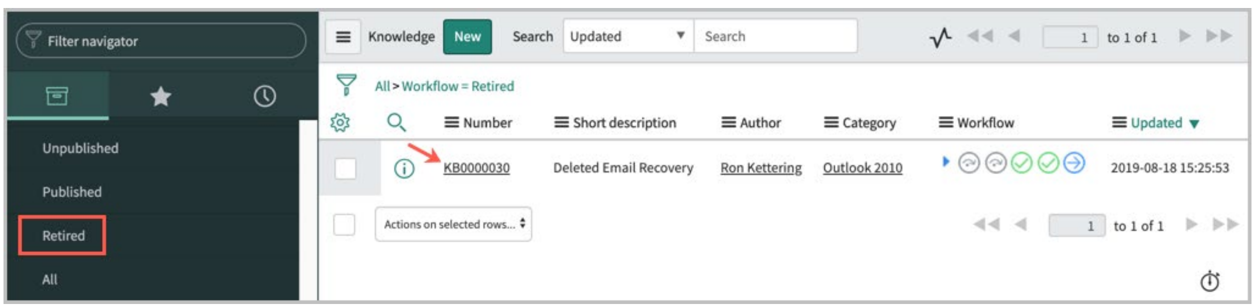


Figure 94: Retired module

The purpose of the **Valid To** field is to set a date for reviewing the article to determine if it is still accurate and current.

If the article is still current but needs to be updated (edited), then the article will go through the **knowledge workflow** again (require approval if that is the workflow established at the **Knowledge Base** level). If the article is no longer current, the article will be **Retired**.

Best practice is for the **Knowledge Owner** and/or Manager to create a dashboard of articles that are expected to retire in the near future (30 or 45 days out) and let the author know to review, establish a new **Valid To** date, republish the article or retire the article.

LEAVING ARTICLE FEEDBACK

FULFILLERS

Fulfillers can:

- Flag an article
- Rate the article (1-5)
- Communicate if an article was helpful
- Leave a comment

Flagging an article will bring it to the attention of the **author** or **knowledge manager**, indicating that something may need to be verified or corrected. A separate window will open to comment on what should be changed.

END USERS

End users can:

- Rate the article (1-5)
- Communicate if an article was helpful
- Leave a comment

Users can view and/or post comments to articles and respond to others' comments.

Article **feedback** can be accessed via **frameset** by **admins**, **knowledge managers**, **knowledge admins**, and **article authors**.

Article feedback is located on the **knowledge feedback** related link tab of the article form.

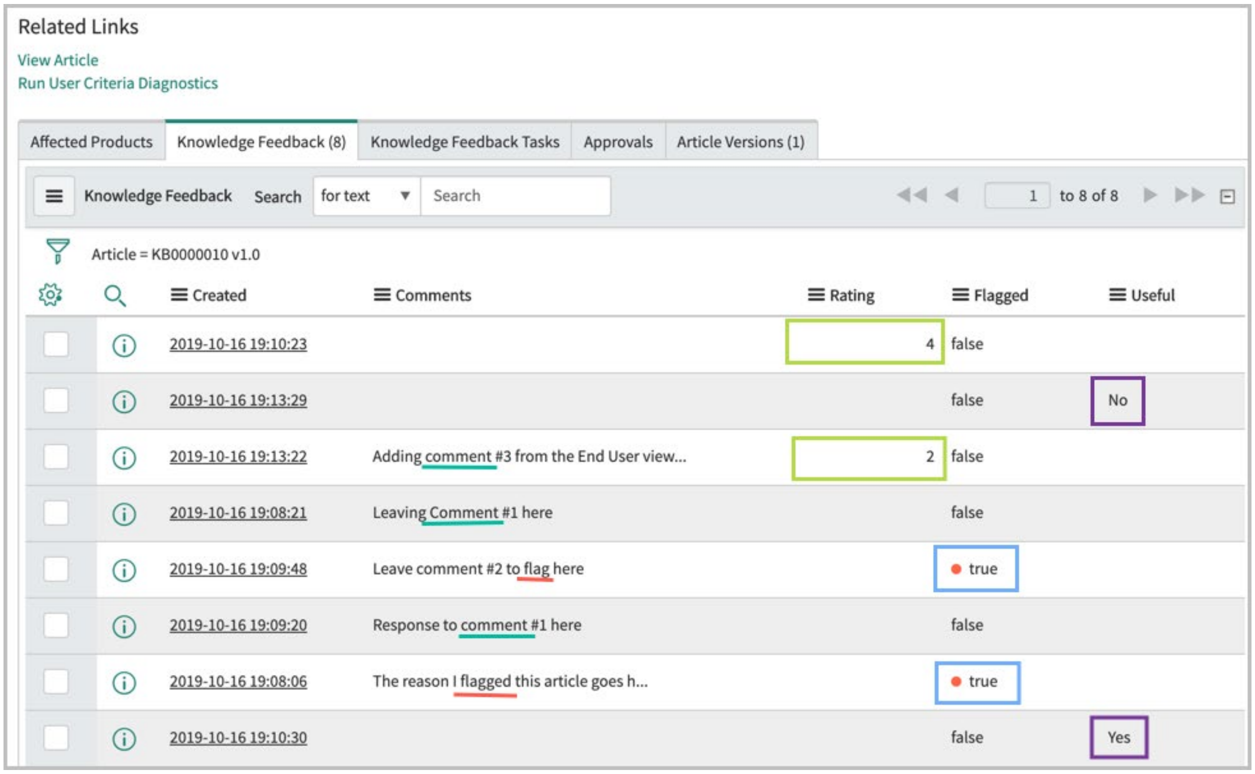


Figure 95: Knowledge Feedback Tab view

Knowledge Article Versioning

If an article needs to be updated, the author can check out the article, make the changes, publish the article, wait for approval and the article will be Re-Published with an updated version number.

Version numbers are located next to the article number.

To make an outdated article current, go to Knowledge>Articles> All and open the **Outdated** article.

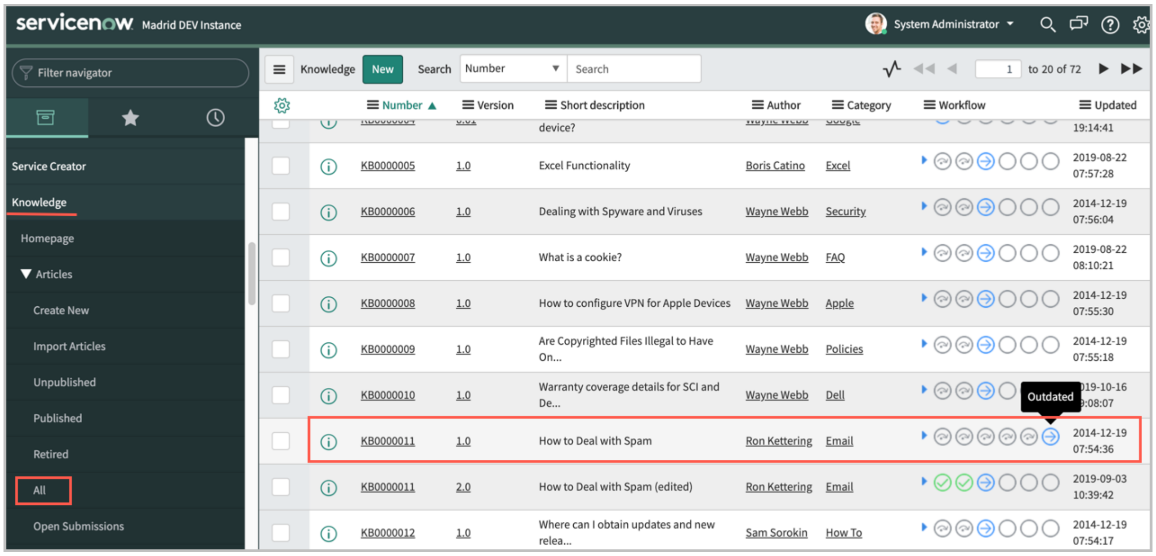


Figure 96: Make past article version current

Click the **make this current** button and follow the normal process to publish an article.

OWNERSHIP GROUPS

Ownership groups can be configured and associated with knowledge articles to maintain article quality, manage approvals, and for timely resolution of feedback.

Can assign an ownership group to a knowledge article and shift the ownership of an article from a single person to a group. An ownership group consists of a group of members and a manager who are responsible for knowledge articles.

Users with **knowledge_domain_expert** or **knowledge_admin** roles can create ownership groups. Users with **knowledge_group_manager** or **knowledge_admin** can edit ownership groups.

When an **Ownership Group** is created, a manager and members are assigned/added.

When a knowledge article is assigned to an ownership group:

- Only **ownership group** members have **contribute access** to the article even if they do not have **contribute access** to the **knowledge base** of the article.

They can **edit**, **approve**, **publish**, and **retire** the **knowledge article** with which they are associated.

- Users who are not a member of the **ownership group** cannot contribute to the article even if they have contribute access to the knowledge base of the article.

When creating or editing a **knowledge article**, the **Ownership Group** field may need to be added to the **Knowledge** form.

Ownership responsibilities include:

- approving knowledge articles
- performing AQI checks to ensuring article quality
- managing feedback tasks for knowledge articles.

To create an **ownership group**:

Navigate to **Knowledge > Ownership Groups > Manage Groups**

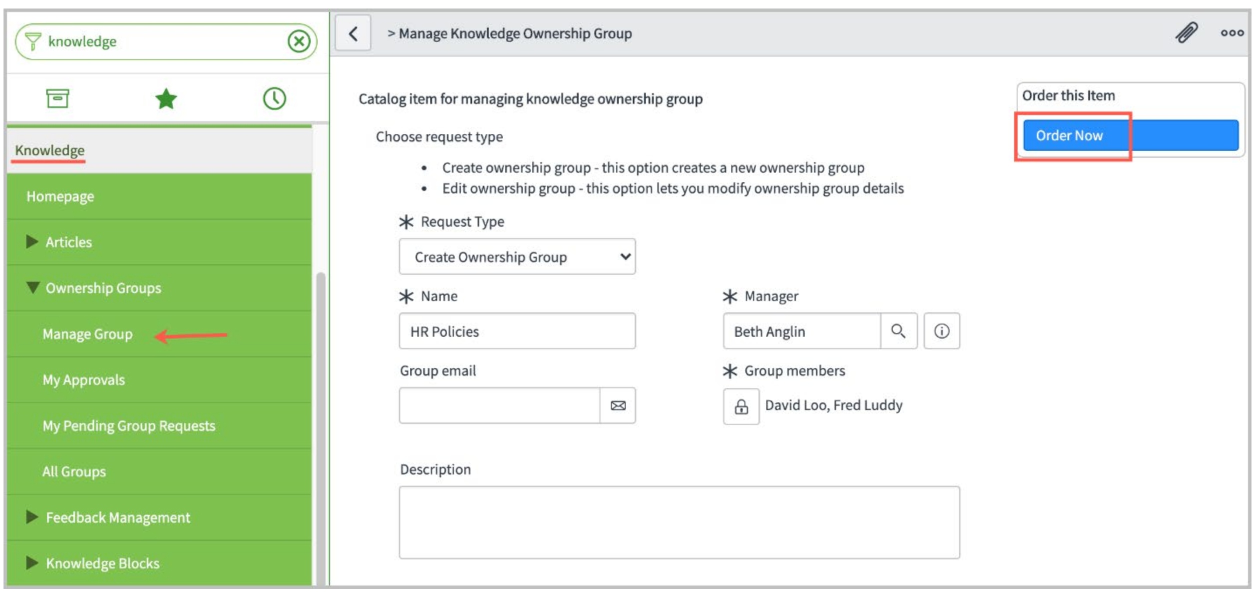


Figure 97: Create an ownership group

When you click “order now,” a **request** is created. When it is **approved**, the group members are given their needed/respective roles.

KNOWLEDGE BLOCKS

Knowledge blocks are reusable pieces of content secured by user criteria that you can add to **knowledge articles** in a **knowledge base**. The user criteria controls which users can read or not read the block content in an article or search, enabling users to more easily view content that is relevant to them.

To use **knowledge blocks**, a **knowledge administrator** or **manager** must enable the **knowledge blocks** feature for each **knowledge base** in which the blocks will be used.

Knowledge contributors can create **knowledge blocks** and insert them into **articles** in a **knowledge base**.

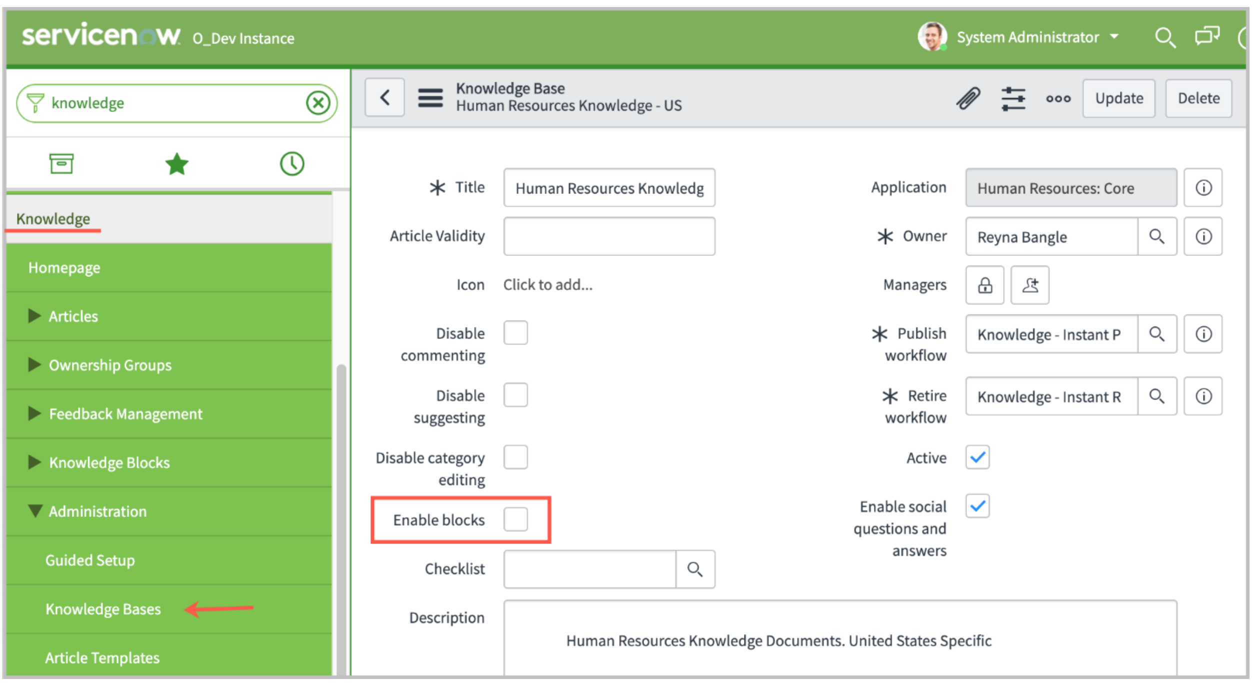


Figure 98: Enable knowledge blocks

Enable the **knowledge blocks** feature for each **knowledge base** where you plan to use the blocks. Once enabled, you can create **knowledge blocks** to add to **knowledge articles** within a **knowledge base**.

Navigate to **Knowledge > Administration > Knowledge Bases**

Note: If the **Enable blocks** check box is not visible, you can add the field to the form by right-clicking the form header and navigating to **Configure** > **Form Layout**.

Note: If you decide to later disable the knowledge blocks feature, all knowledge blocks within the knowledge base must be deleted before you can clear the box.

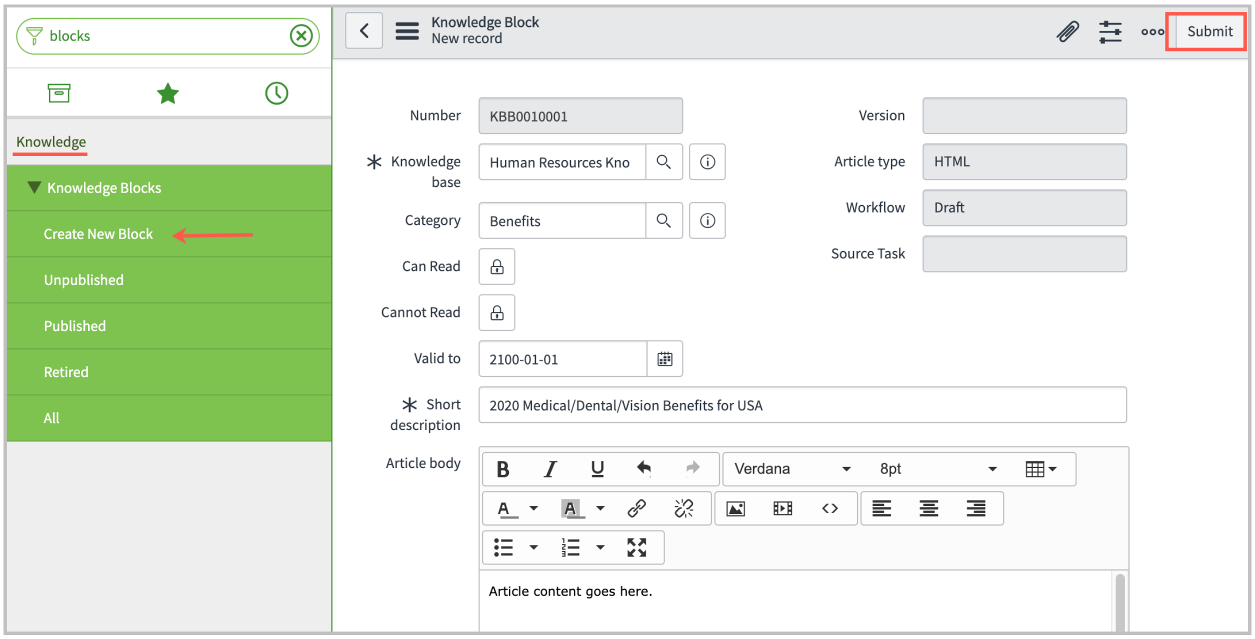


Figure 99: Create new block

Create or modify a knowledge block to define a reusable piece of content that can be inserted into knowledge articles in a knowledge base.

Navigate to **Knowledge > Knowledge Blocks > Create New Block.**

The knowledge block is secured by user criteria, which controls what users, groups, roles, companies, locations, or departments can read or not read the content in an article or search, enabling users to more easily view content that is relevant to them.

Assess the quality of knowledge articles with the article quality index (AQI). The AQI helps maintain consistent quality of knowledge articles attached to a knowledge base where articles are written by various authors.

AQI Process

1. Create an AQI checklist.
2. Assign the AQI checklist to a knowledge base.
3. Perform an AQI review to evaluate the quality of the article.
4. Monitor pending and completed reviews.

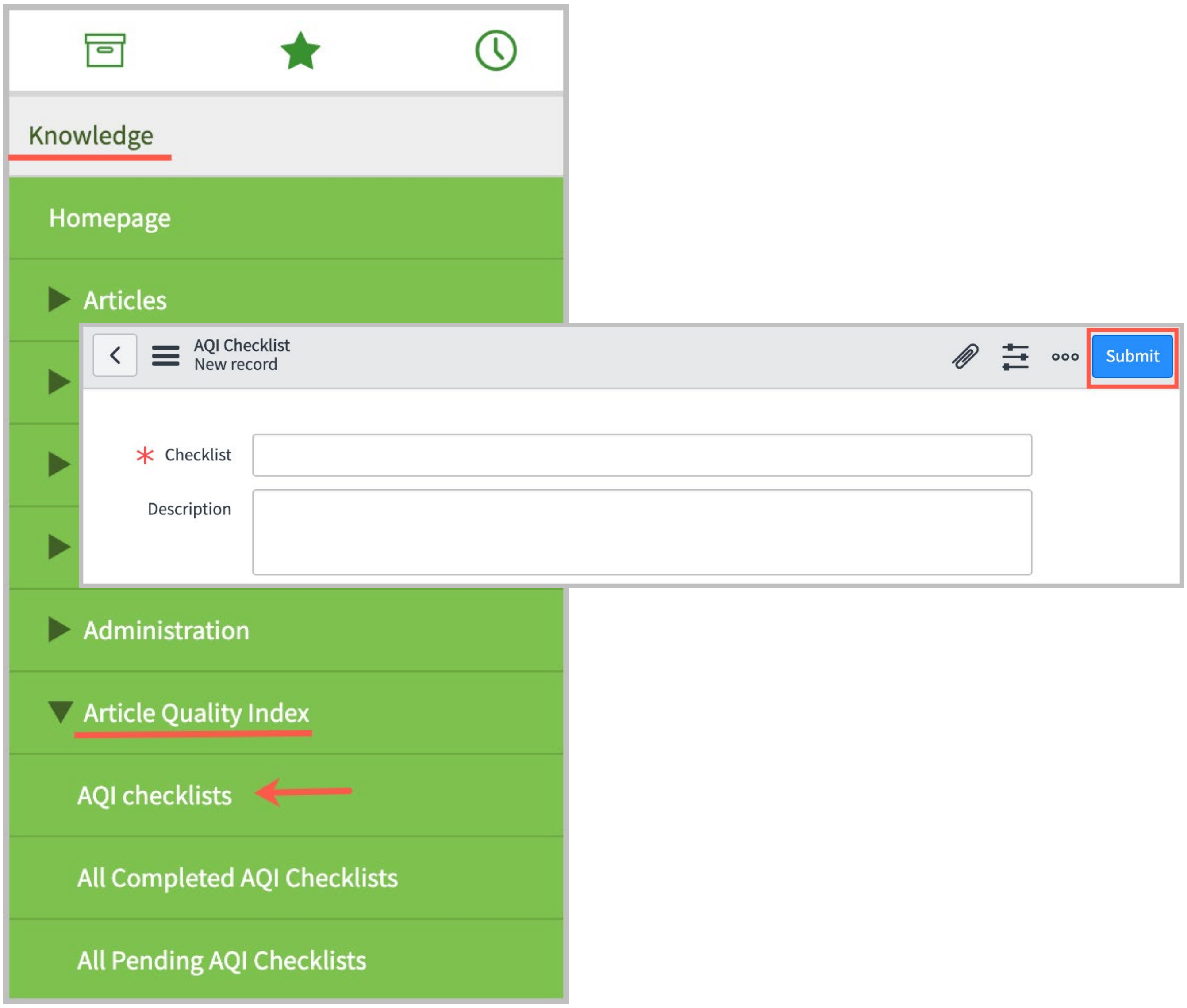


Figure 100: Create an AQI checklist

Create a checklist of questions that reviewers can use to evaluate the quality of knowledge articles.

Navigate to **Knowledge > Article Quality Index > AQI checklists**, click **New**, and fill out the name of the checklist and description. Then, click **Submit**.

Once the AQI Checklist record is created, the Checklist Questions show up as a Related List. Click **New** to create a question.

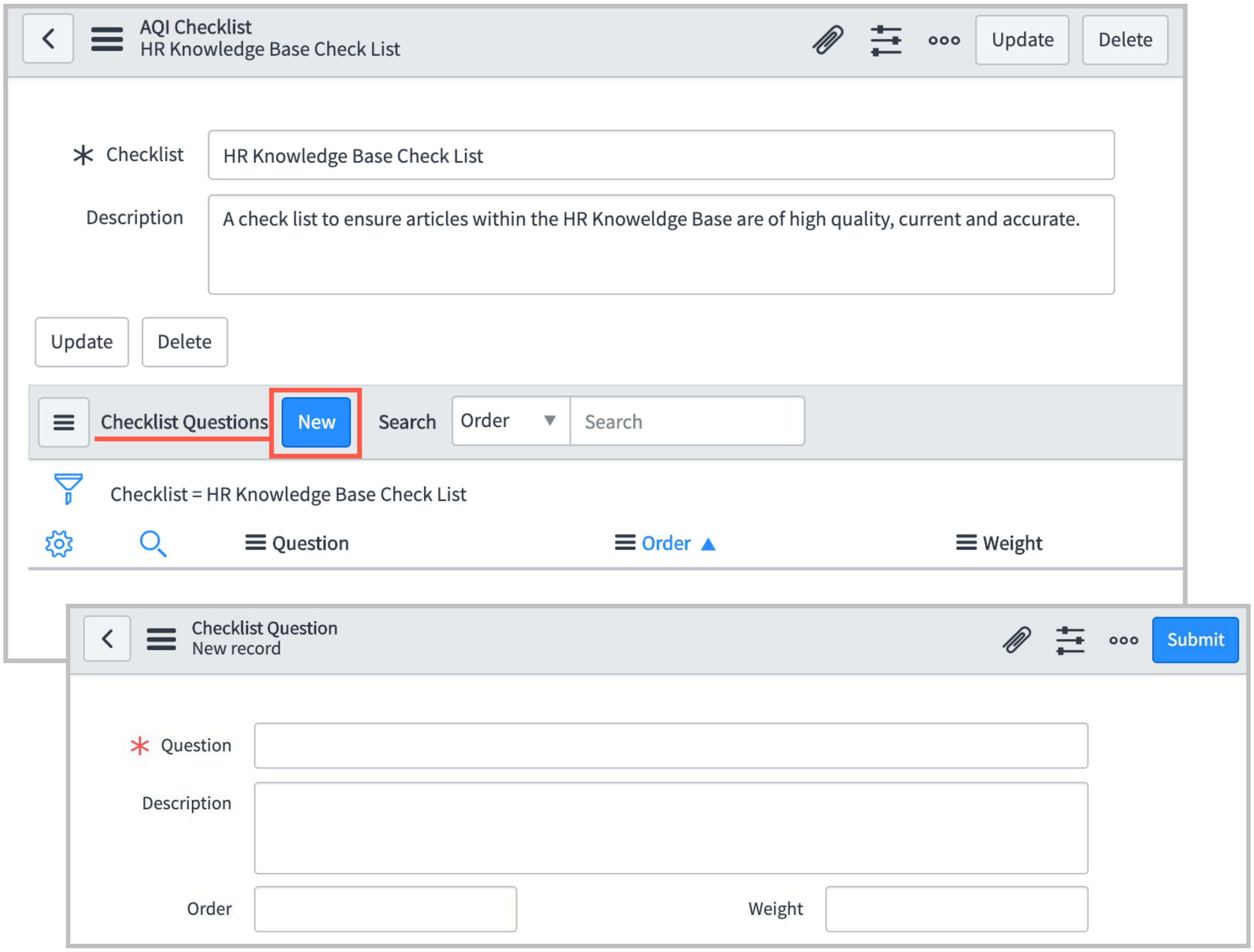


Figure 101: AQI Checklist Questions