

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

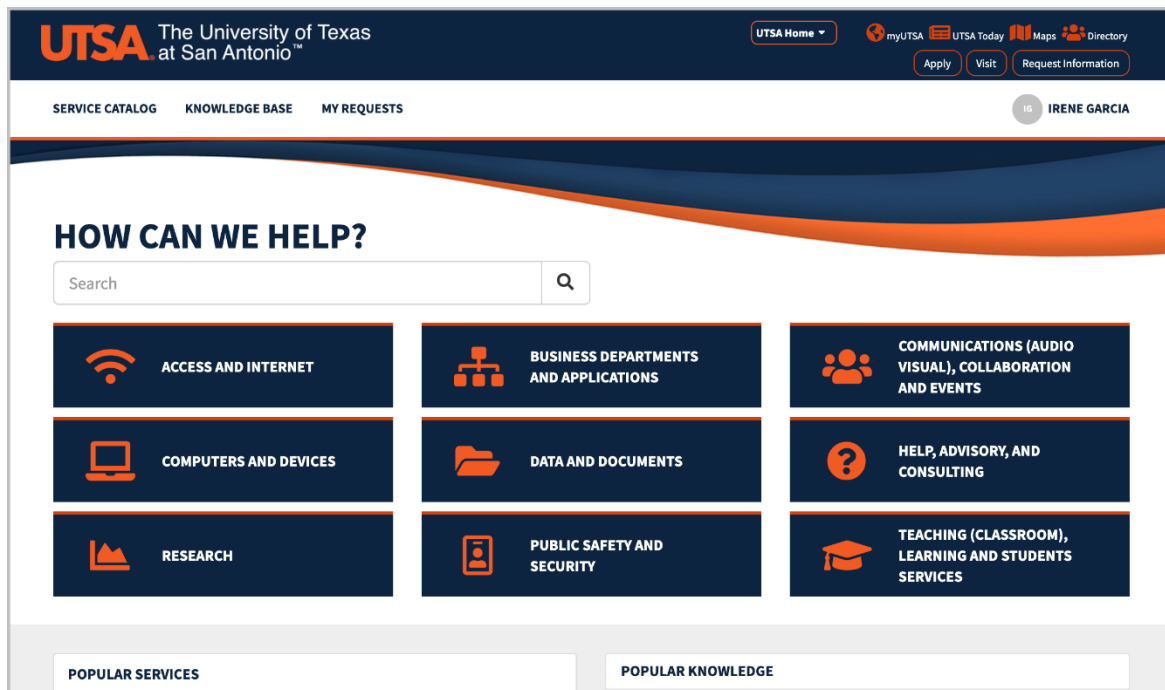


Figure 1. SNOW Portal Screenshot

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.

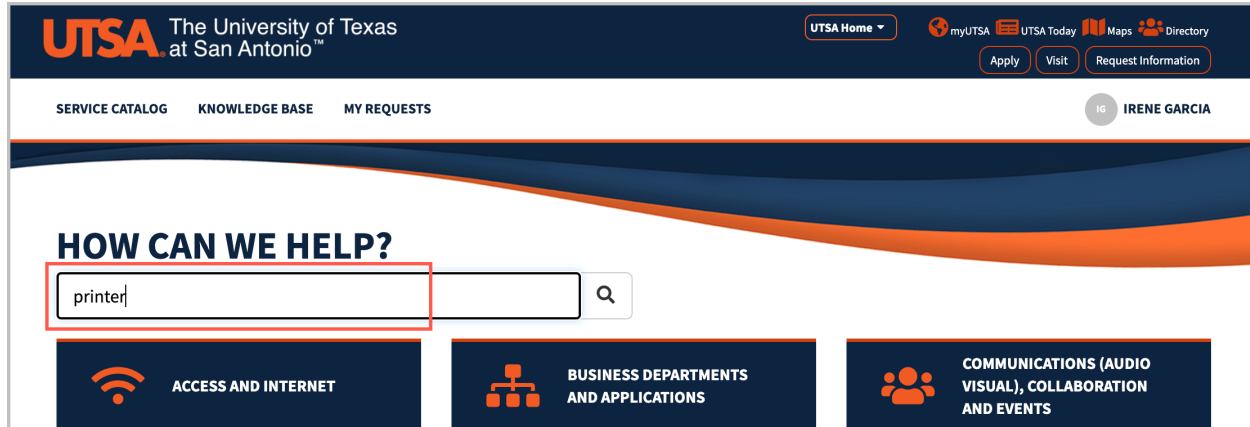


Figure 2: Search Engine

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.

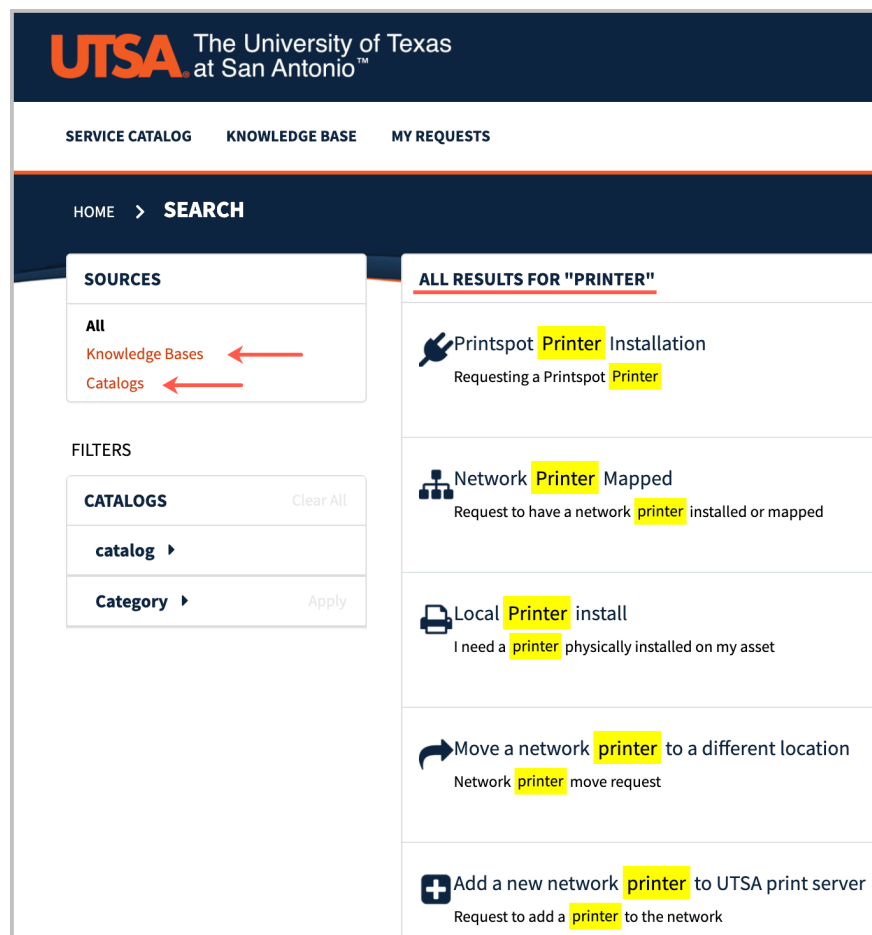


Figure 3: Search Results Example

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**.

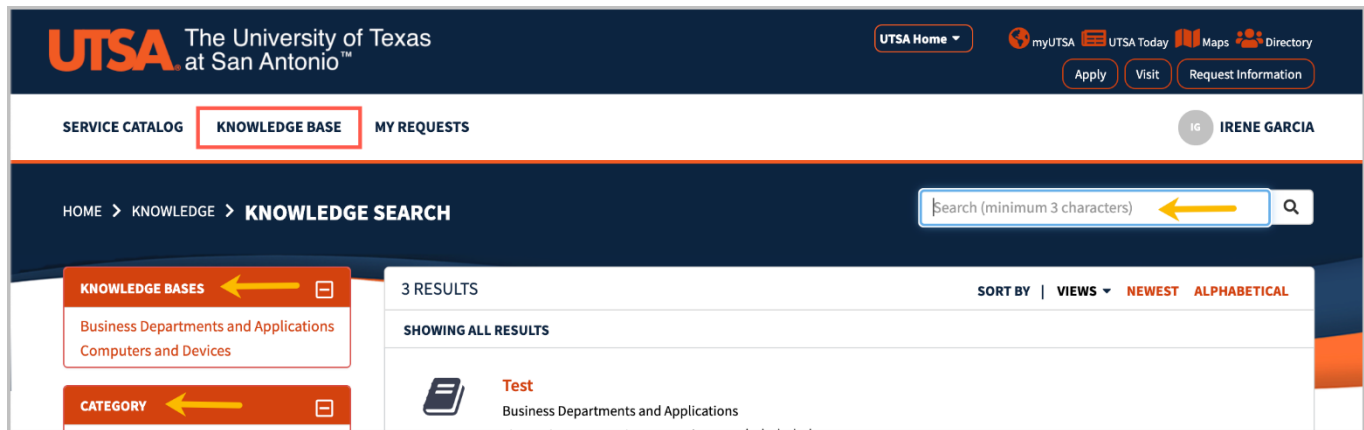


Figure 4: Knowledge Base Search

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

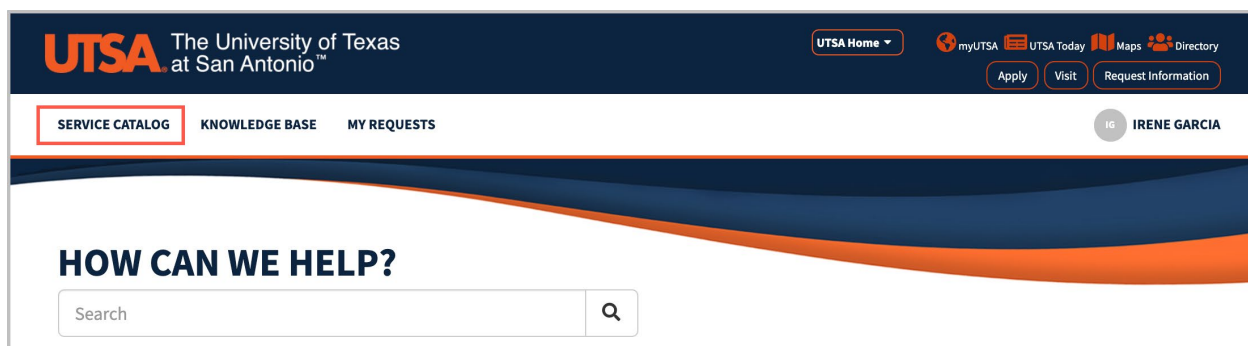


Figure 5: Service Catalog Link

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

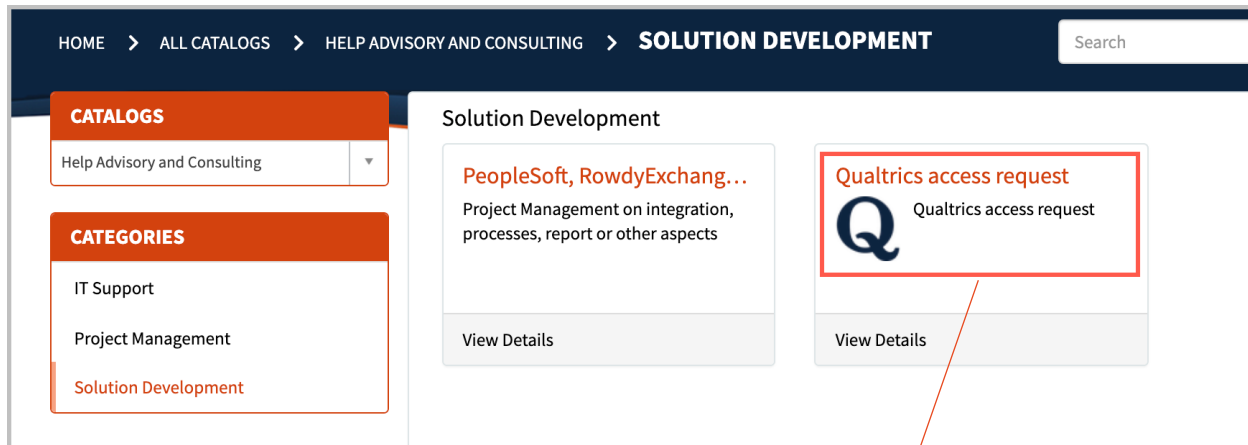
Navigation:

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.



The screenshot shows the 'Qualtrics access request' form. The title 'Qualtrics access request' is at the top, followed by the Qualtrics logo. Below the logo, there are two main sections. The first section has a label '* On behalf of' and a dropdown menu showing 'Michael Arriaga'. To the right of this is a label '* Contact Phone Number' and an empty text input field. Below these, there are radio buttons for 'Personal' and 'Departmental', with 'Departmental' selected. At the bottom of this section is a text area for 'Additional Comments'. On the right side of the form, there is a sidebar with a dropdown menu showing '1', a 'Delivery Time: 1 Day' label, a 'Submit' button, and a 'REQUIRED INFORMATION' section with a 'Contact Phone Number' label.

Figure 7: Catalog Item Request Form Example



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

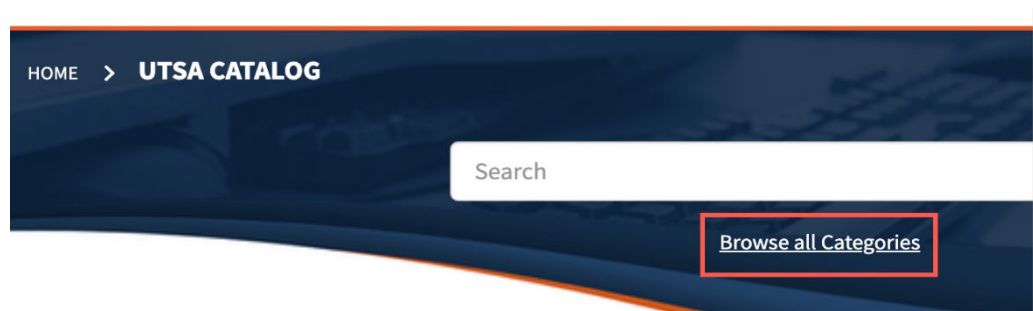


Figure 8: Browse all Categories

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

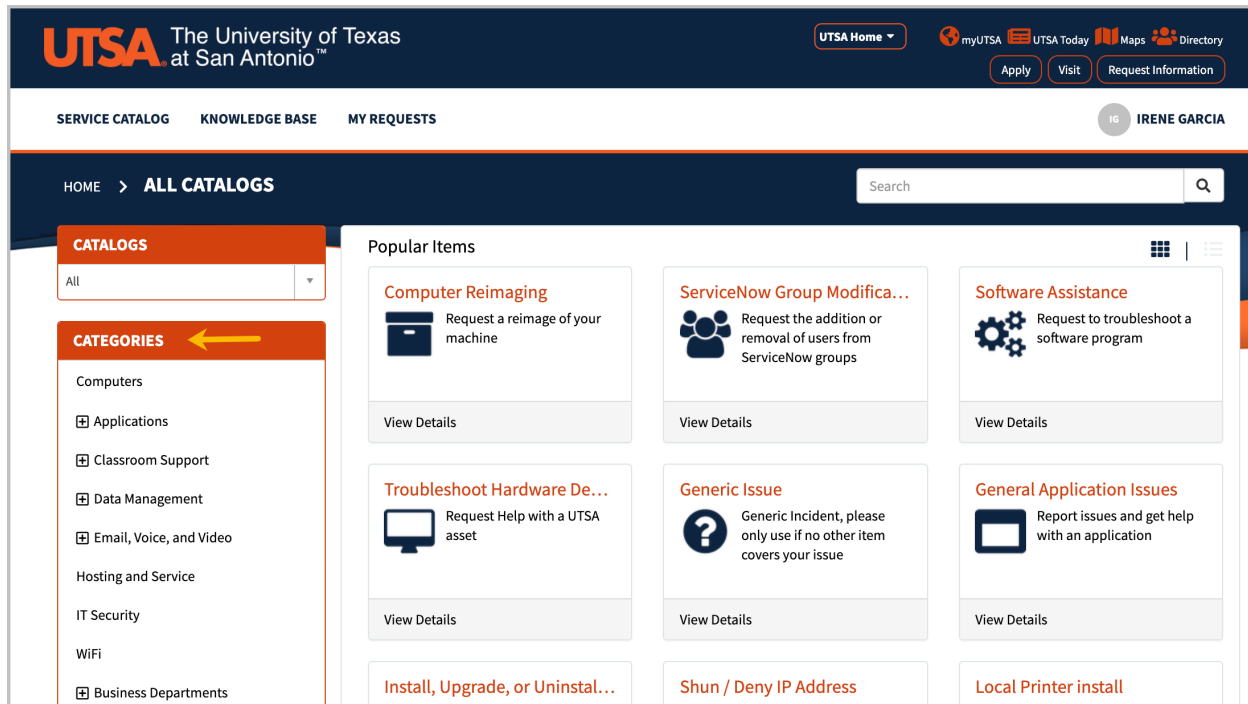


Figure 9: Browse by Category list

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.”

UTSA The University of Texas at San Antonio™

UTSA Home myUTSA UTSA Today Maps Directory Apply Visit Request Information

SERVICE CATALOG KNOWLEDGE BASE MY REQUESTS

HOME > ALL CATALOGS > ACCESS AND INTERNET > WIFI >

Search

NEW LOCATION WIFI SETUP

New Location WiFi Setup

New service for wireless network request

User

*On behalf of Irene Garcia x

*Contact Phone Number 12104584855

*Please describe the new service requested

*Department

*What area will it cover ?
This is an example select box please leave me alone x

1

Add attachments

Submit

REQUIRED INFORMATION

Please describe the new ...

Department

Figure 10: Service Catalog Request Form Example

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

SERVICE CATALOG KNOWLEDGE BASE MY REQUESTS

HOME > REQUEST

Search

Submitted : 2020-08-03 14:42:23
Request Number : **REQ0010099**
Estimated Delivery : --

| Item | Delivery Date | Stage | Price (ea.) | Quantity | Total |
|--------------------|---------------|-----------------------------|-------------|----------|-------|
| New Location Wi... | -- | Request Approved (Approved) | --- | -- | --- |

Figure 11: Sample Request Submission

ACCESSING REQUESTS FROM THE PORTAL HOMEPAGE

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

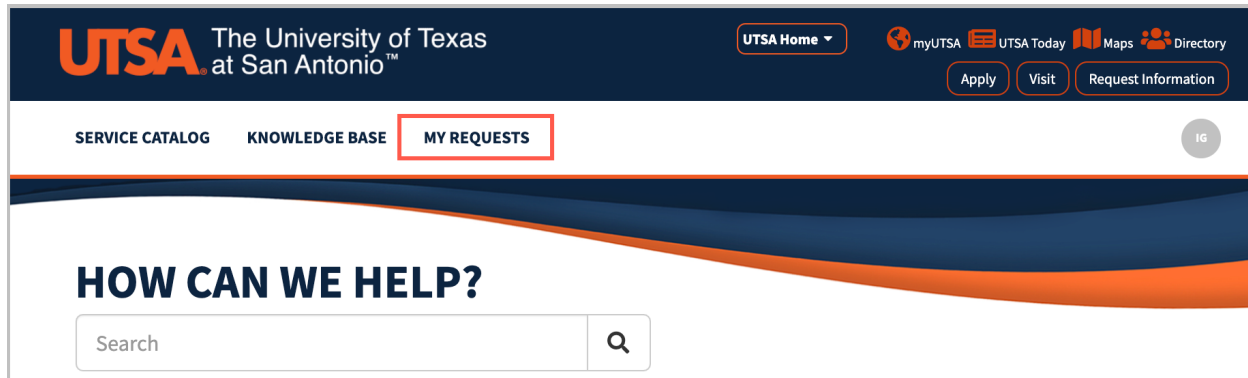


Figure 12: My Requests

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.

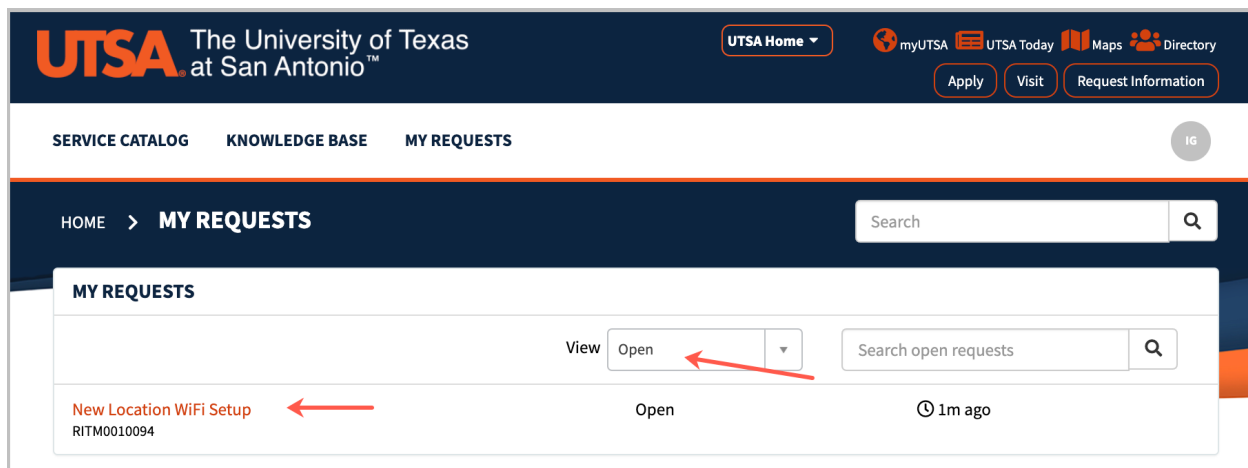


Figure 13: View Requests (Open & Closed)

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

Request Approved ✓

Fulfillment Waiting for Catalog Task: Fulfillment Task

Completed

REQUEST DETAILS

| | |
|---------|-------------------------------|
| Number | RITM0010091 |
| Item | PeopleSoft Interfaces Request |
| State | Open |
| Created | 22d ago |
| Updated | 22d ago |

Options

On behalf of

Lisa Springer

Contact Phone Number

800-55-6254

Where do you need an interface created or modified

PeopleSoft

What action is needed

Test Action

PEOPLESOFT INTERFACES

Type your message here...

Send

LS

Start

Lisa Springer

22d ago

RITM0010091 Created

Figure 14: Request Status

REQUEST MANAGEMENT

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

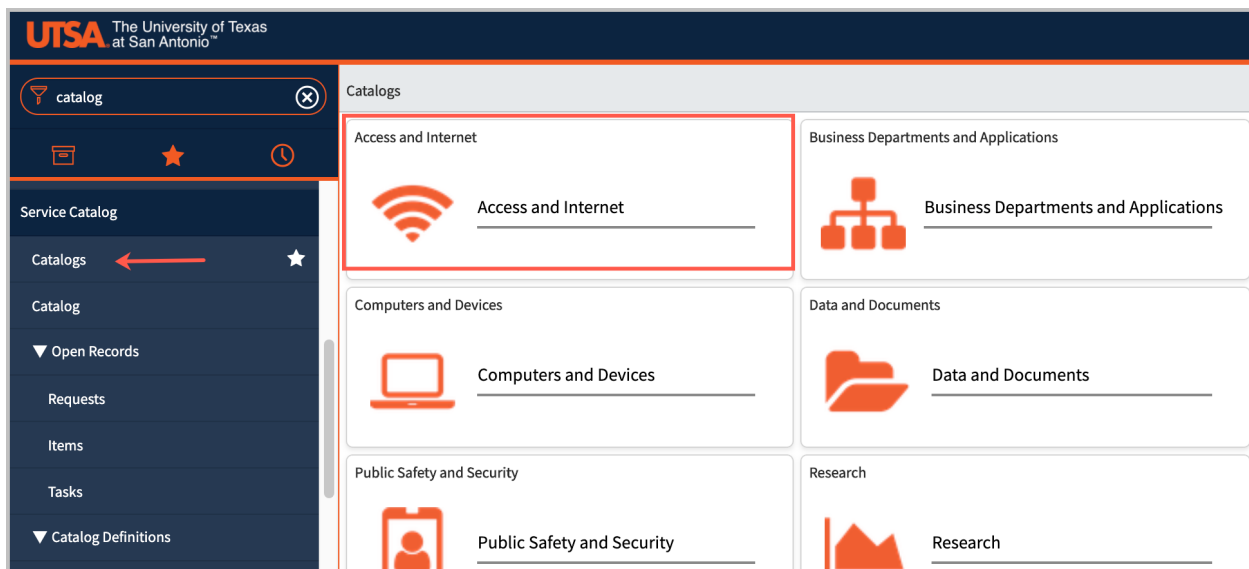


Figure 15: Request from Frameset

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**

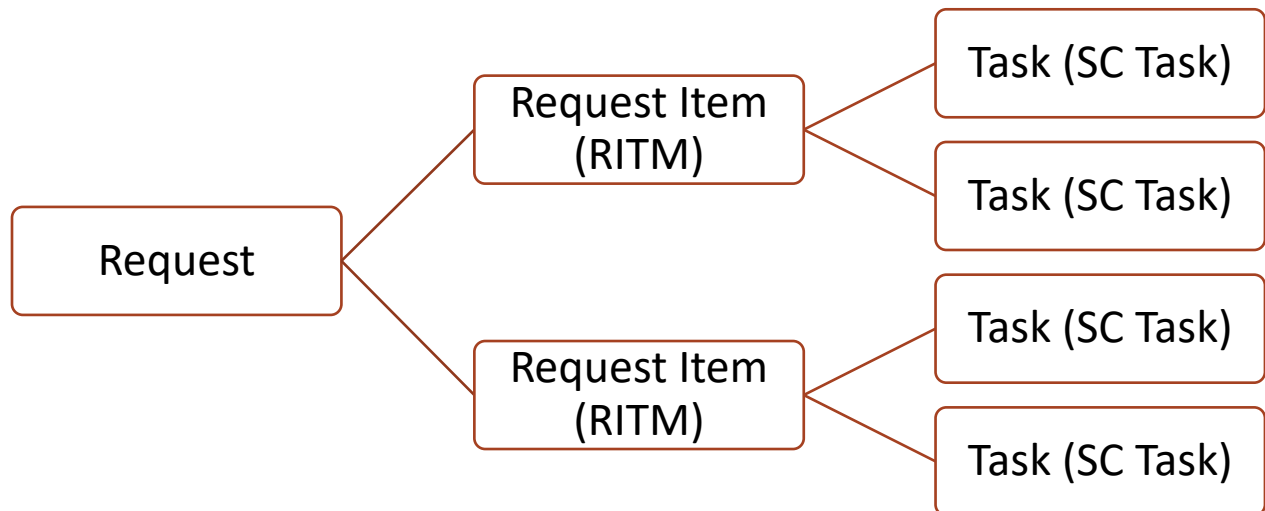


Figure 16: Request Process

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.*

Catalog Item System Access

Catalog items are goods or services available to order from the service catalog. Items can be anything from hardware, like tablets and phones, to software applications, to furniture and office supplies.

- Enter a Name and Short description to display for the item.
- Enter a Price, approvals, variables, and other information as needed.

Name: System Access Application: Global Active: ☒

Catalogs: Access and Internet Category: Access

Item Details | Process Engine | Picture | Pricing | Portal Settings

Select the appropriate process engine for the catalog Item. Only one engine can be selected.

Flow: Workflow: UTSA - Generic Auto Approved Catalog Item Execution Plan:

Fulfillment group: **UTSA - Generic Auto Approved Catalog Item - Published**

```

graph LR
    Begin[Begin] -- Always --> Approval[Approval Action  
Auto Approve]
    Approval -- Always --> CatalogTask[Catalog Task  
Stage: Fulfillment (1 Day)  
Fulfillment Task]
    CatalogTask -- Always --> End[End  
Stage: Completed  
End]
  
```

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**.

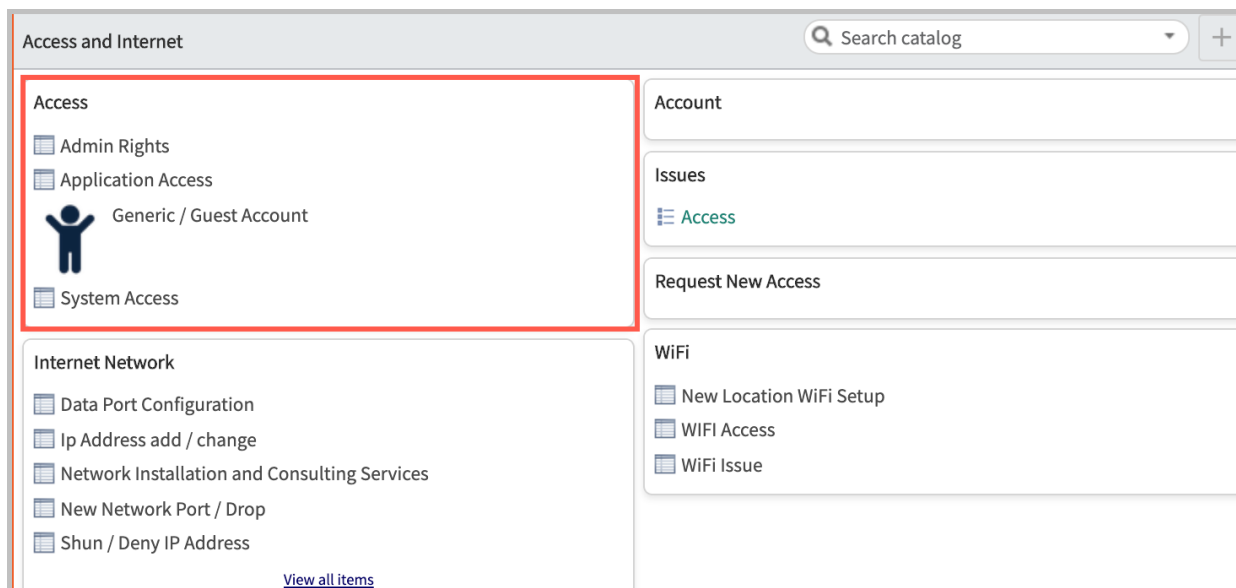


Figure 18: Access and Internet

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

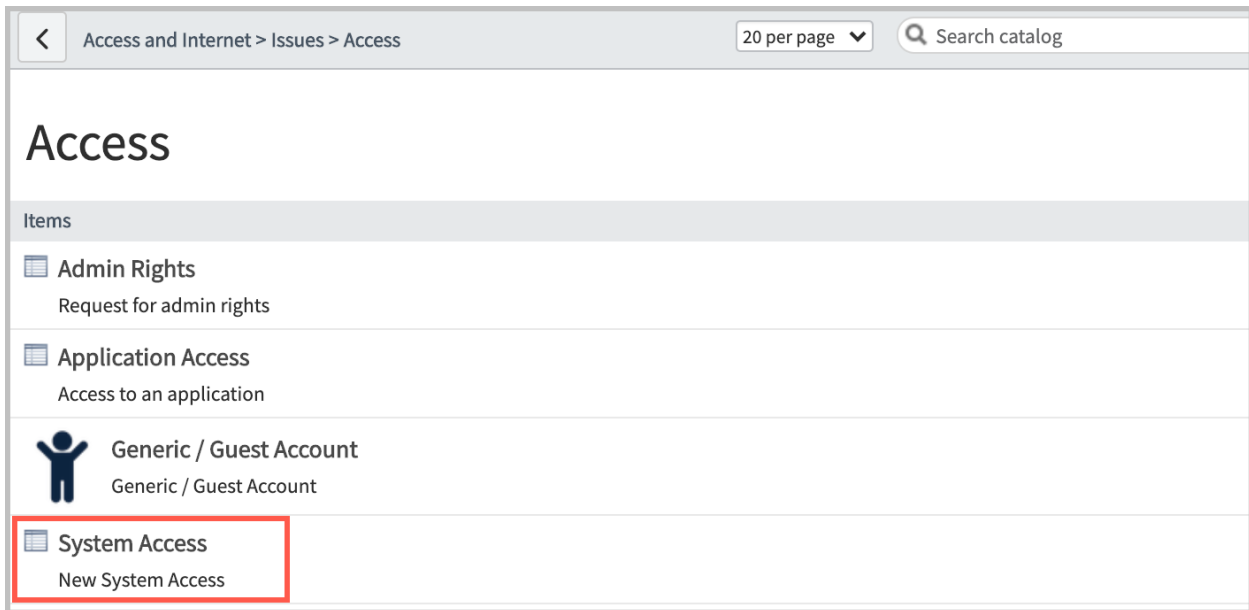


Figure 20: Access Request

The screenshot shows the 'New System Access' request form. The breadcrumb trail is 'Access and Internet > Issues > Access > System Access'. The form is titled 'New System Access' and features a computer monitor icon. It contains several mandatory fields marked with an asterisk: 'On behalf of' (with a search icon and an information icon), 'Contact Phone Number', and 'What is the UTSA ID for the user needing permission?'. The 'On behalf of' field contains the text 'Adrian Grant', and the 'UTSA ID' field contains 'B97RR8765'. The 'Contact Phone Number' field contains '312-548-6969'. On the right side, there is a section titled 'Order this Item' with a 'Quantity' dropdown set to '1' and a 'Delivery time' of '1 Day'. Below this, the 'Order Now' button is highlighted with a red rectangular box. There is also an 'Add to Cart' button. At the bottom right, a 'Shopping Cart' section shows 'Empty'.

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.

Order Status

Thank you, your request has been submitted

Order Placed: 2020-08-05 12:27:59
Request Number: [REQ0010101](#) ☆
Estimated Delivery Date of Complete Order: 2020-08-06

Back to Catalog Continue Shopping Home

☒ Request Approved (Approved)
☒ Fulfillment Waiting for Catalog Task: Fulfillment Task (In progress)
☐ Completed (Pending - has not started)

| Description | Delivery Date | Stage | Price (ea.) | Quantity | Total |
|-----------------------------------|---------------|---|-------------|----------|-------|
| New System Access | 2020-08-06 | ▶ <input checked="" type="radio"/> <input checked="" type="radio"/> <input type="radio"/> | | 1 | |

Figure 21: Request Confirmation

Who can access:

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

UTSA The University of Texas at San Antonio

UTSA Home myUTSA UTSA Today Maps Directory Apply Visit Request Information

SERVICE CATALOG KNOWLEDGE BASE MY REQUESTS

LS LISA SPRINGER

HOME > MY REQUESTS

Search

MY REQUESTS

View Open

Search open requests

System Access RITM0010096 Open 26m ago

UTSA The University of Texas at San Antonio

UTSA Home myUTSA UTSA Today Maps Directory Apply Visit Request Information

SERVICE CATALOG KNOWLEDGE BASE MY REQUESTS

AG ADRIAN GRANT

HOME > MY REQUESTS

Search

MY REQUESTS

View Open

Search open requests

System Access RITM0010096 Open 30m ago

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.

| | Number | Priority | State | Assigned to | Short description | Task type |
|--------------------------|-------------------------------|----------|-------|-------------|---------------------|--------------|
| <input type="checkbox"/> | SCTASK0010062 | 4 - Low | Open | (empty) | System Access | Catalog Task |
| <input type="checkbox"/> | SCTASK0010056 | 4 - Low | Open | (empty) | System Access | Catalog Task |
| <input type="checkbox"/> | SCTASK0010054 | 4 - Low | Open | (empty) | WiFi Issue | Catalog Task |
| <input type="checkbox"/> | SCTASK0010052 | 4 - Low | Open | (empty) | Software Assistance | Catalog Task |
| <input type="checkbox"/> | SCTASK0010049 | 4 - Low | Open | (empty) | Software Assistance | Catalog Task |
| <input type="checkbox"/> | SCTASK0010045 | 4 - Low | Open | (empty) | Software Assistance | Catalog Task |

Figure 23: My Groups Work

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

< Catalog Task
 SCTASK0010062

Follow Update **Close Task**

Number: SCTASK0010062 Priority: 4 - Low

* Assignment group: Tech Cafe State: Open

Assigned to: Angela Porter Request item: RITM0010096

* Department: ADMISSIONS Requested for: Adrian Grant

* Short description: System Access

Description: See variables section for details

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**.

Requested Item Details:

- Number: RITM0010096
- Item: System Access
- Department: ADMISSIONS
- Service:
- Request: REQ0010101
- Opened: 2020-08-05 12:27:59
- Closed: 2020-08-05 13:30:47
- Opened by: Lisa Springer
- Stage: Completed
- State: Closed Complete

Request Details:

- Number: REQ0010101
- Requested for: Adrian Grant
- Due date: 2020-08-06 02:27:59
- Opened: 2020-08-05 12:27:59
- Opened by: Lisa Springer
- Request state: Closed Complete

Figure 25: Request Closed

My Work and My Groups Work

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

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Filter navigator

Service Desk

- Callers
- Incidents
- Knowledge
- My Work
- My Groups Work
- My Approvals

Tasks Search Updated Search

All > Assignment group = Tech Cafe > Active = true > Assigned to = (empty) > State != Pending

| | Number | Priority | State | Assigned to | Short description | Task type | Updated |
|--|---------------|----------|-------|-------------|---|-----------------------------|---------------------|
| | PTASK0010018 | 4 - Low | New | (empty) | The root cause needs to be identified. | Problem Task | 2020-07-17 10:09:43 |
| | SCTASK0010056 | 4 - Low | Open | (empty) | System Access | Catalog Task | 2020-07-15 14:26:21 |
| | SCTASK0010054 | 4 - Low | Open | (empty) | WiFi Issue | Catalog Task | 2020-07-15 13:43:18 |
| | SCTASK0010052 | 4 - Low | Open | (empty) | Software Assistance | Catalog Task | 2020-07-15 09:00:17 |
| | ICT0001073 | 4 - Low | Open | (empty) | Send email to everyone in Building 1-A re: the intranet lines accidentally cut and therefore down. We expect the internet to be back up within 30 mins. | Incident Communication Task | 2020-07-14 15:33:37 |

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

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

The screenshot shows the UTSA Agent Workspace interface. On the left, a sidebar menu lists various categories: Interactions (Unassigned, Assigned to me, Open, All), Tasks (My Work, My Group's Work), SLAs (My Work, My Group's Work), and Incidents (Assigned to me, Open). Red arrows point to 'My Group's Work' under both the 'Tasks' and 'SLAs' sections. The main panel displays 'My Group's Work' with a count of 13 items. Below the title, it says 'Last refreshed just now'. A table lists the tasks with columns: Number, Priority, State, Assigned to, and Short description.

| Number | Priority | State | Assigned to | Short description |
|-------------------------------|----------|-------|-------------|---|
| PTASK0010018 | 4 - Low | New | (empty) | The root cause needs to be identified. |
| SCTASK0010056 | 4 - Low | Open | (empty) | System Access |
| SCTASK0010054 | 4 - Low | Open | (empty) | WiFi Issue |
| SCTASK0010052 | 4 - Low | Open | (empty) | Software Assistance |
| ICT0001073 | 4 - Low | Open | (empty) | Send email to everyone in Building 1-A r... |
| ICT0001065 | 4 - Low | Open | (empty) | Initial Faculty Staff Communication |
| ICT0001067 | 4 - Low | Open | (empty) | Initial Stakeholder Communication |
| ICT0001070 | 4 - Low | Open | (empty) | Initial Technical Communication |
| SCTASK0010049 | 4 - Low | Open | (empty) | Software Assistance |

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.

The screenshot shows the top section of the UTSA Agent Workspace interface. It includes a 'Catalog Tasks' header with a 'New' button and a search bar. Below the header, there are filters: 'All > Active = true > Assignment group = Tech Cafe'. A table of column titles is displayed, each with a search box: Number, Created, Short description, Assignment group, Assigned to, Due date, Request, and Request item. The 'Created' column is currently sorted. Below the column titles, a single row of data is visible for task SCTASK0010056.

| Number | Created | Short description | Assignment group | Assigned to | Due date | Request | Request item |
|-------------------------------|---------------------|-------------------|---------------------------|-------------|---------------------|----------------------------|-----------------------------|
| SCTASK0010056 | 2020-07-15 14:26:21 | System Access | Tech Cafe | (empty) | 2020-07-15 14:26:21 | REQ0010093 | RITM0010087 |

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.

FULLFILLER 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.

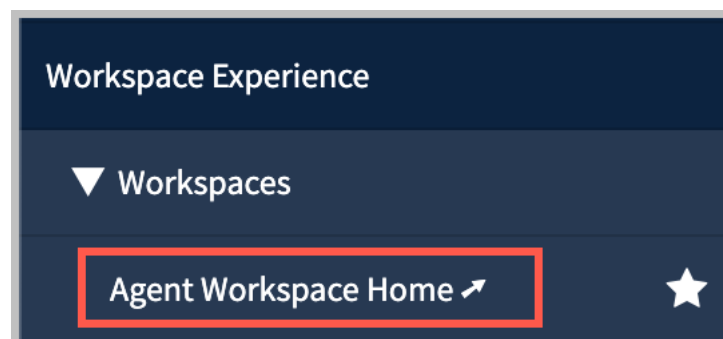
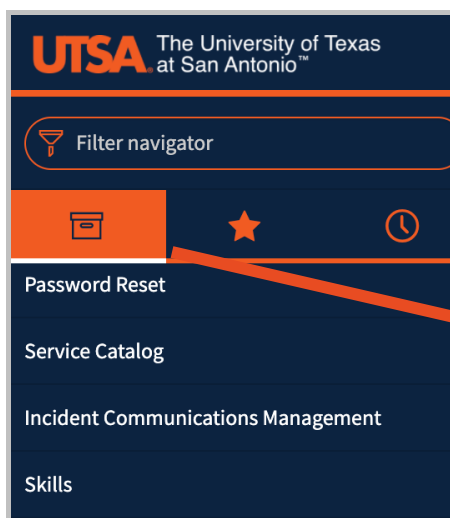


Figure 29: Agent Workspace Home

NAVIGATION

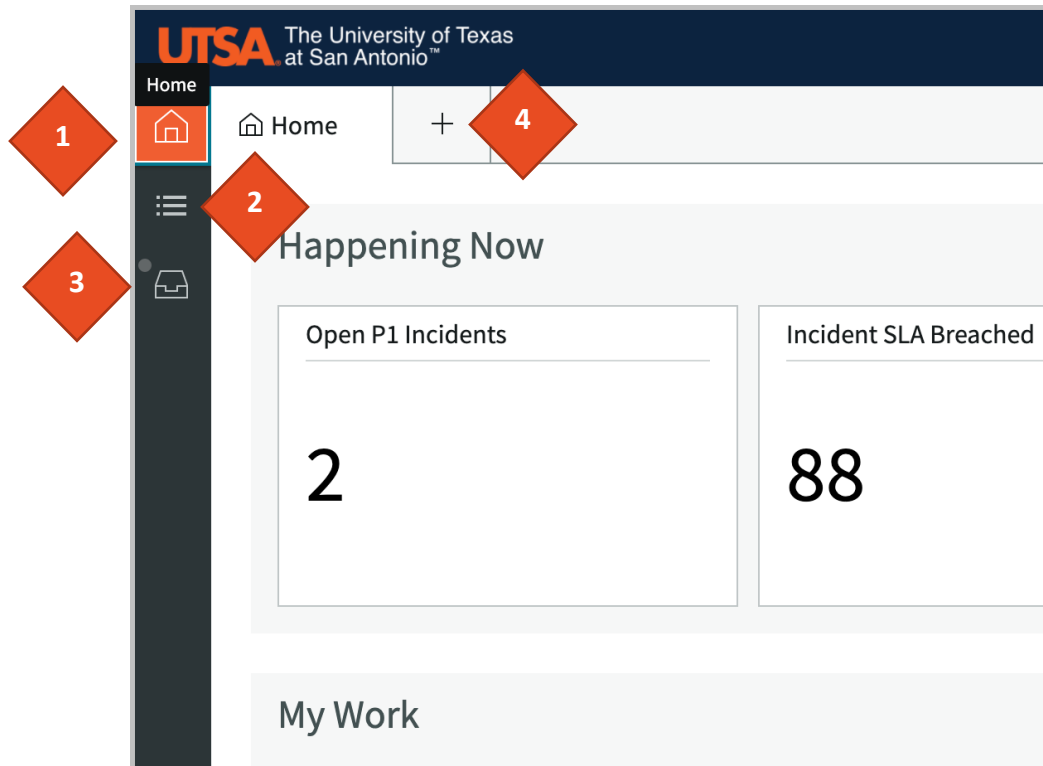


Figure 30: Workspace Navigation

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**.

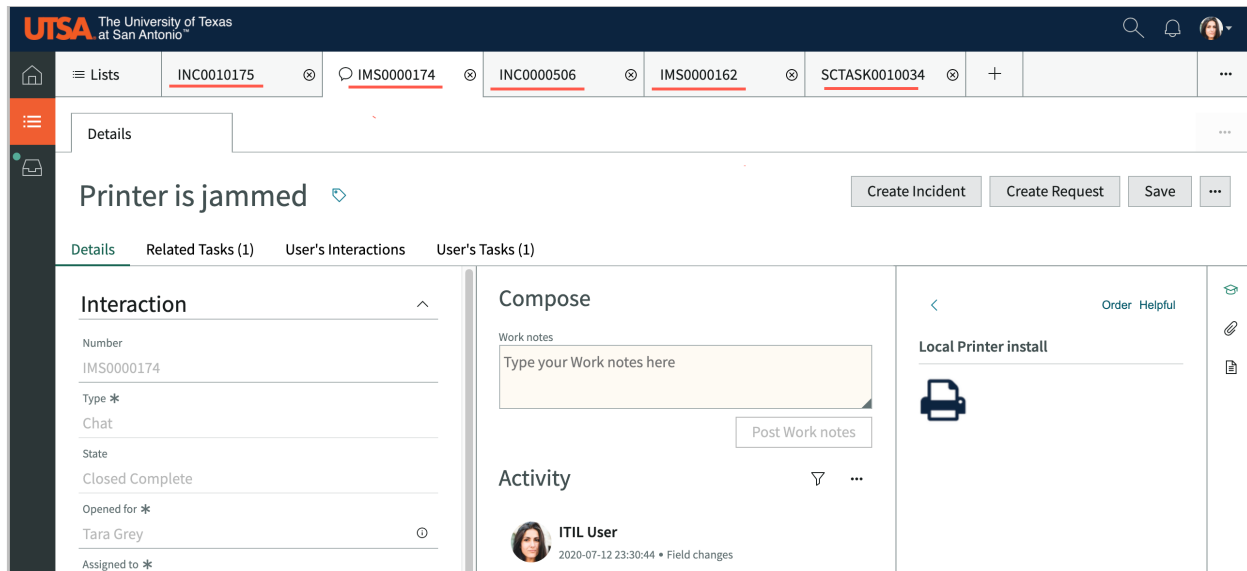


Figure 31: Agent Workspace tabs

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.

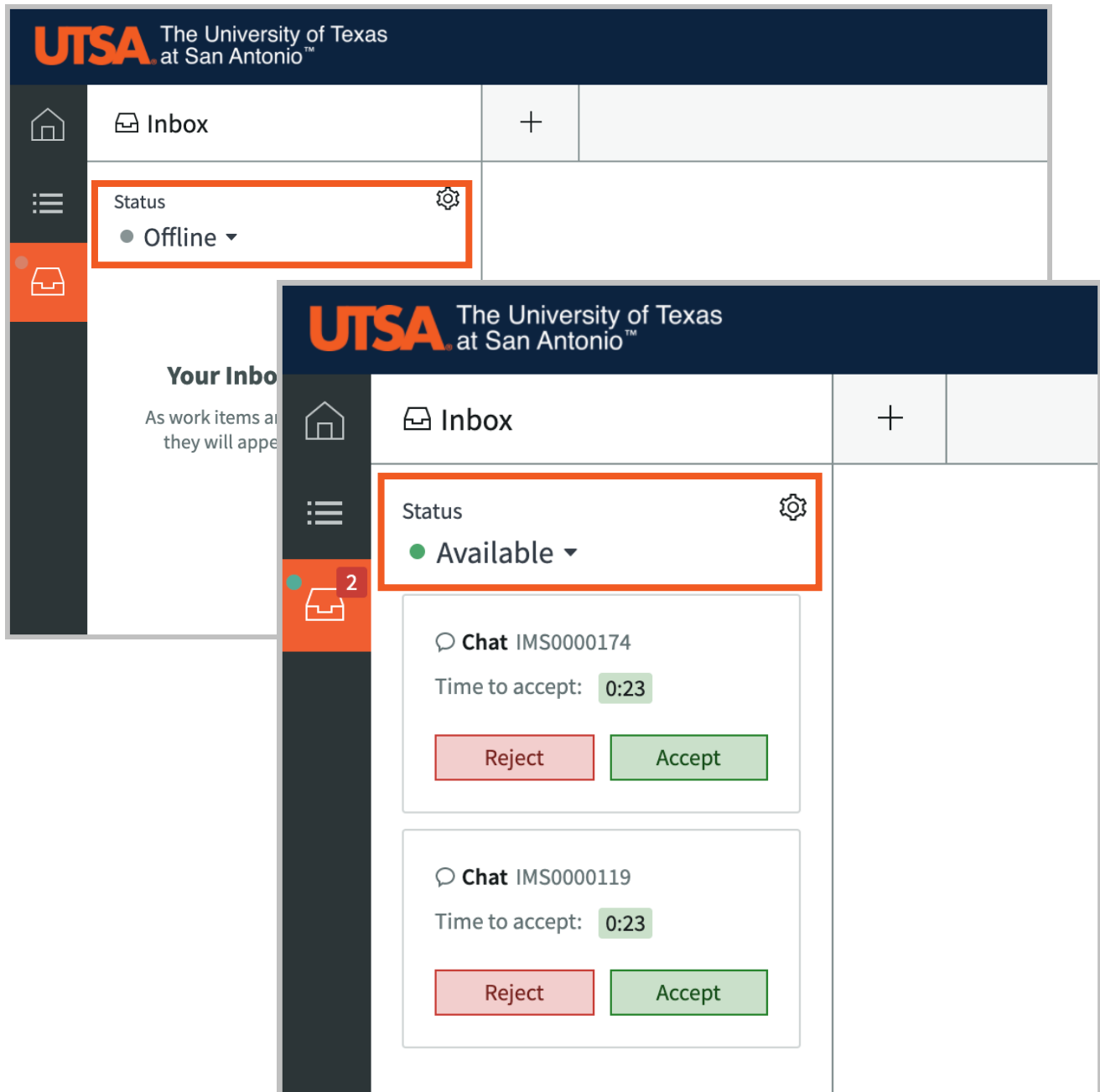


Figure 32: Agent Status

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

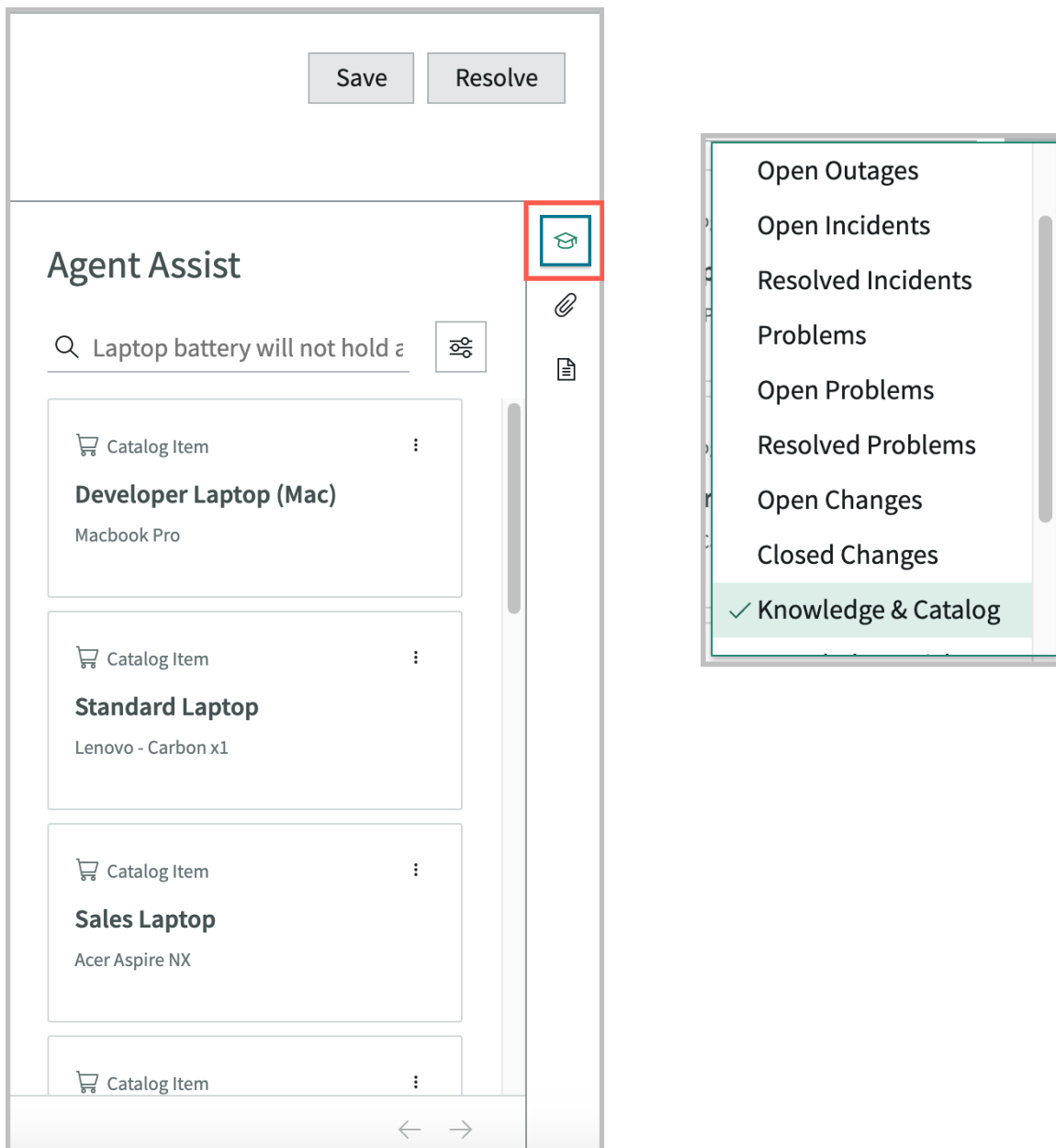


Figure 33: Agent Assist

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**.

The screenshot displays the UTSA Service Desk Agent interface. The top header shows the UTSA logo and navigation icons. The left sidebar contains 'Inbox' and 'Status' (Available). The main panel is titled 'Printer is jammed' and includes a 'Details' tab. A red box highlights the 'Create Incident' button. The 'Agent Assist' panel on the right shows search results for 'Printer is jammed', including 'Printspot Printer Installation' and 'Network Printer Mapped'.

Figure 34: Completing an Interaction

This creates an **Incident Record**:

Create New Incident

Save Resolve

Details

Incident

Number: INC0010175

Contact type: chat

State: New

Impact: 3 - Low

Urgency: 3 - Low

Priority: 4 - Low

Service: Computers and Devices

Category: Computers/Peripherals/???

Agent Assist

Printer is jammed

Catalog Item: Printspot Printer Installation
Requesting a Printspot Printer

Catalog Item: Network Printer Mapped
Request to have a network printer installed or mapped

Figure 35: New Incident Record

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

Printer is jammed

Priority: 4 - Low, State: New, Service: Computers and De..., Category: Computers/P...

Incident

Contact type: chat

State: New

Impact: 2 - Medium

Urgency: 3 - Low

Priority: 4 - Low

Assignment group: Desktop Support - Main Tech / Desktop Support

Assigned to: ITIL User

Short description: Printer is jammed

State

In Progress

Impact

2 - Medium

Urgency

3 - Low

Priority

4 - Low

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**

The screenshot displays the ServiceNow user interface for an incident record. At the top, a navigation bar shows several incident numbers, with 'IMS0000162' selected and underlined. Below this, the 'Details' tab is active, showing the title 'reimaging computer'. To the right of the title, there are three buttons: 'Create Incident', 'Create Request' (which is highlighted with a red rectangular box), and 'Save'. Below the buttons, there are tabs for 'Details', 'Related Tasks (3)', 'User's Interactions (3)', and 'User's Tasks (2)'. The 'Details' tab is selected, showing fields for 'Number' (IMS0000162), 'Type' (Self-service), 'State' (Work in Progress), 'Opened for' (Abraham Lincoln), and 'Assigned to' (ITIL User). To the right of the details, there is a 'Compose' section with a text area for 'Work notes' and a 'Post Work notes' button. Below the compose section is an 'Activity' feed showing a recent update from 'ITIL User' at '2020-07-13 12:09:16' with the text 'Assigned to ITIL User was Empty'. On the far right, there is an 'Agent Assist' panel with a search bar and two suggestions: 'Computer Reimaging' (a Catalog Item) and 'How can I restore my compute...' (an Article).

Figure 37: Create Request

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

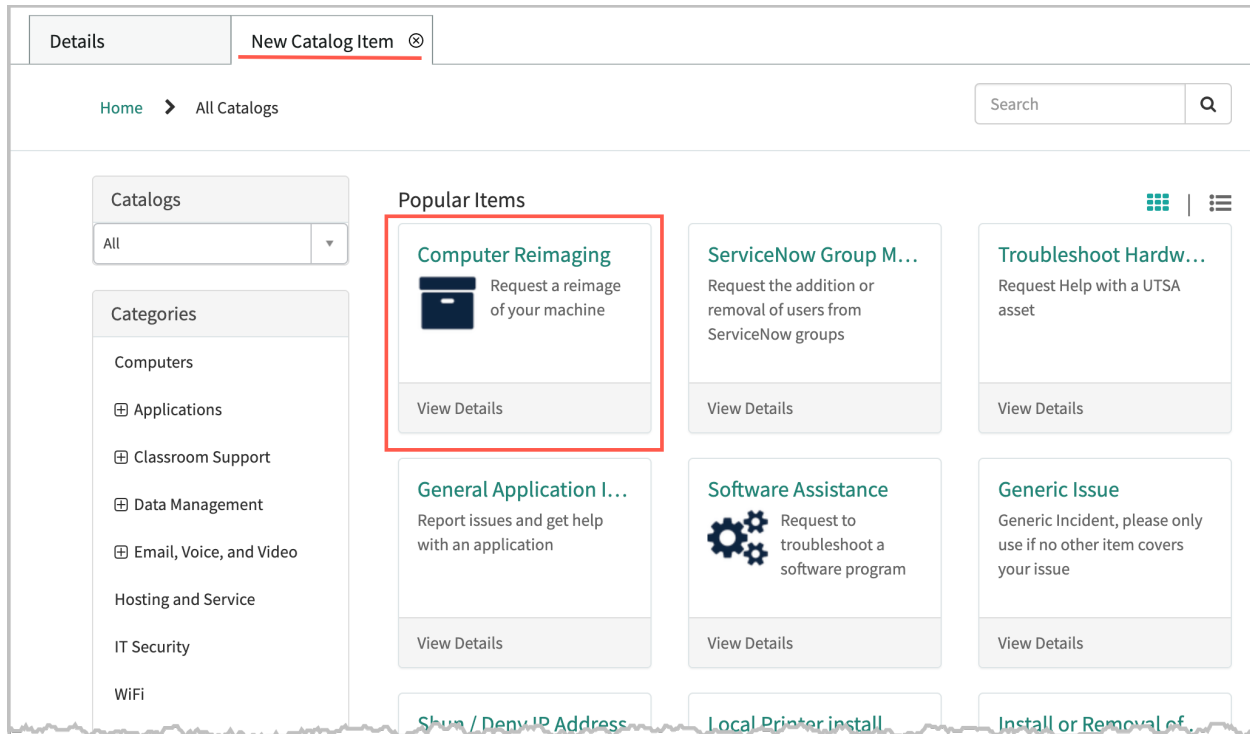


Figure 38: Catalog Item Search

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

The screenshot shows the 'Computer Reimaging' catalog item request form. The form is titled 'Computer Reimaging' with the subtitle 'Request a reimage of your machine'. It includes a blue folder icon and a note: 'If you can still sign into your computer look for a current backup, please drop off at Tech Cafe, please allow 3 business days...etc.' The form contains several input fields: '* On behalf of' (with a dropdown menu showing 'Abraham Lincoln'), '* Contact Phone Number' (with a text input field containing '+1 (305) 284-4470'), '* Computer Type' (with a dropdown menu showing 'Laptop'), and '* Operating System' (with a dropdown menu showing 'Windows'). There is also a note: '* Please list the asset ID of the system' with a text input field containing 'White tag that says UTSA ID, on the bottom of laptop or side of desktop'. A red box highlights the 'Order Now' button on the right side of the form.

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**.

The screenshot shows the 'Details' view of an incident titled 'laptop is running hot'. The incident details include: Major Incident state: Rejected, Priority: 3 - Moderate, State: In Progress, Service: Computers and De..., Category: Server and Storage. Below the details, there are tabs for 'Details', 'Task SLAs (7)', 'Affected CIs (3)', and 'Impacted Services/CIs (1)'. The 'Details' tab is active, showing the incident number (INC0010138), caller (Rachael Mccord), and contact phone number (82747472727). On the right side, there is a 'Compose' section with a 'Comments' dropdown and a 'Post Comments' button. Below the 'Compose' section, there is an 'Agent Assist' section with a search bar and a list of catalog items, including 'Developer Laptop (Mac)'. A dropdown menu is open from the 3-dot icon in the top right corner, showing options: 'Compose Email', 'Copy Incident', 'Create Change Request', 'Create Outage', 'Create Request' (highlighted with a red box), 'Propose Major Incident', and 'Report Knowledge Gap'.

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).

The screenshot shows the 'Details' view of an incident titled 'Badge is not working'. The incident has a priority of '3 - Moderate', state of 'In Progress', service of 'Security and Publi...', and category of 'Physical Access'. Below the incident details, there are tabs for 'Details', 'Task SLAs (2)', 'Affected CIs', 'Impacted Services/CIs (1)', and 'Child Incidents'. The 'Child Incidents' tab is selected, showing a count of 0. A dropdown menu is open, showing options: 'Resolve', 'Save', 'Compose Email', 'Copy Incident', 'Create Change Request', 'Create Outage', 'Create Problem', 'Create Request', 'Propose Major Incident', and 'Report Knowledge Gap'. A 'New' button is also visible next to the 'Child Incidents' count.

Figure 41: Other Incident Management Options

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

The screenshot shows the 'Details' view of an incident titled 'Badge is not working'. The incident has a priority of '3 - Moderate', state of 'In Progress', service of 'Security and Publi...', and category of 'Physical Access'. Below the incident details, there are tabs for 'Details', 'Task SLAs (2)', 'Affected CIs', 'Impacted Services/CIs (1)', and 'Child Incidents (1)'. The 'Child Incidents (1)' tab is selected, showing a count of 1. A table lists the child incidents:

| Number | Opened | Short description | Caller |
|------------|---------------------|--|--------|
| INC0010179 | 2020-07-13 22:22:46 | Badge does not work. Stopped workin... | Sean A |

Figure 42: Child Incidents Tab

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

| Related Records | | ^ |
|-----------------|------------------|---|
| Parent Incident | Change Request | |
| INC0010178 | ⓘ | 🔍 |
| Problem | Caused by Change | |
| | 🔍 | 🔍 |

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 change, 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.

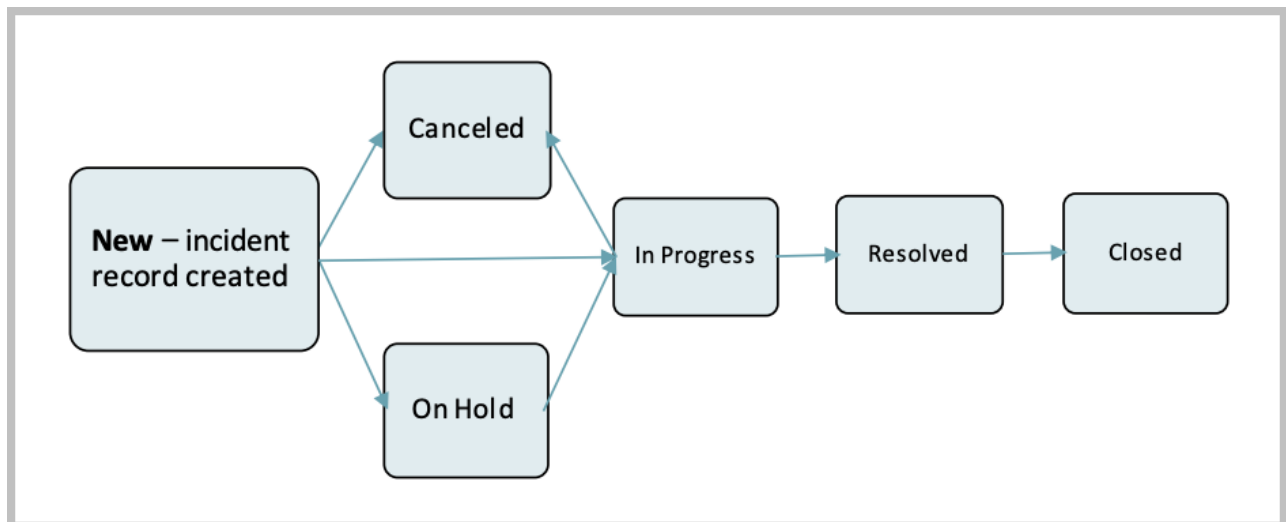


Figure 44: Incident Management States



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.

The screenshot displays the 'Incident Notes' interface. At the top, there are three tabs: 'Notes' (selected), 'Related Records', and 'Closure Information'. Below the tabs, there are two sections: 'Watch list' and 'Collaborators', each with a lock icon and a user icon. The main section is 'Collaborator Notes', which contains a large text area for notes. To the right of the text area is a list icon. Below the text area, there is a checkbox labeled 'Additional comments (Customer visible)' and a 'Post' button. At the bottom, there is a section for 'Activities: 2'. The first activity is from 'system' (indicated by a 'S' icon) and is titled 'Email sent'. The subject of the email is 'We have received your request'. The timestamp is '2020-07-03 16:39:54'. To the right of the activity list is a filter icon.

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**.

The diagram illustrates the process of changing an incident's priority. It shows two states of an incident form and a corresponding view of the 'Notes' tab in the system interface.

Initial State (Top Form):

- Impact: 3 - Low
- Urgency: 2 - Medium
- Priority: 4 - Low

Changed State (Bottom Form):

- Impact: 2 - Medium
- Urgency: 1 - High
- Priority: 2 - High

A red vertical line connects the 'Priority' field of the initial state to the 'Priority' field of the changed state, indicating the change.

System Interface (Right Panel):

The interface shows the 'Notes*' tab selected. It includes a 'Watch list' with lock and add icons. Below this, a red asterisk (*) is next to the 'Collaborator Notes' label, which is highlighted with a yellow bar. A red arrow points to this bar. Below the collaborator notes, there is a section for 'Additional comments (Customer visible)'.

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.

The screenshot displays the Incident Management System interface for incident INC0010157. The top section contains fields for incident details: Number (INC0010157), Contact type (Phone), State (On Hold), On hold reason (Awaiting Customer Response), Impact (2 - Medium), Urgency (1 - High), and Priority (2 - High). The bottom section shows the 'Notes' tab with fields for Watch list, Collaborators, Collaborator Notes, and Additional comments (Customer visible).

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)

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.

The screenshot shows the 'Affected CIs' tab selected in a navigation bar. Below the tabs, there is a header area with a menu icon, the text 'Affected CIs', an 'Add' button, a 'Search' label, a dropdown menu set to 'Configuration Item', and a search input field. Below this, a filter section shows a funnel icon and 'Task = INC0010198'. Another filter section shows a gear icon, a magnifying glass icon, and a menu icon followed by 'Configuration Item'. The main content area is empty and displays the message 'No records to display'.

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.

The screenshot shows the 'Impacted Services/CIs' tab selected in a navigation bar. Below the tabs, there is a header area with a menu icon, the text 'Impacted Services/CIs', an 'Add' button, a 'Search' label, a dropdown menu set to 'Configuration Item', and a search input field. Below this, a filter section shows a funnel icon and 'Task = INC0010198'. Another filter section shows a gear icon, a magnifying glass icon, and a menu icon followed by 'Configuration Item'. The main content area displays a table with the following columns: 'Data and Documents', 'Managed by', 'Owned by', 'Approval group', and 'Location'. The first row of data shows '(empty)' for all these fields. The table also includes a checkbox and an information icon in the first column.

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.

The screenshot shows a web interface for managing incidents. At the top, there are tabs for 'Task SLAs (2)', 'Affected CIs (1)', 'Impacted Services/CIs (1)', and 'Child Incidents (1)'. Below the tabs is a header bar with a menu icon, the text 'Child Incidents', and buttons for 'New' and 'Edit...'. There is also a search bar with a dropdown menu set to 'Number' and a 'Search' button. Below the header, there is a filter icon and the text 'Parent Incident = INC0010158'. A table with incident details is shown below. The table has columns for 'Number', 'Opened', 'Short description', 'Caller', and 'Priority'. The first row of data shows incident INC0010157, opened on 2020-07-03 at 16:34:22, with the description 'Receiving a Cert Error message', caller 'Adeela Malik', and priority '2 - High'.

| | Number | Opened | Short description | Caller | Priority |
|--|----------------------------|---------------------|--------------------------------|------------------------------|----------|
| | INC0010157 | 2020-07-03 16:34:22 | Receiving a Cert Error message | Adeela Malik | 2 - High |

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 | Priority | Impact | Urgency | Priority |
|------------|------------|--------------|--------------------|---------------------|------------------------|
| 1 - High | 1 - High | 1 - Critical | Impact: 1 - High | Urgency: 1 - High | Priority: 1 - Critical |
| 1 - High | 2 - Medium | 2 - High | Impact: 2 - Medium | Urgency: 3 - Low | Priority: 4 - Low |
| 1 - High | 3 - Low | 3 - Moderate | Impact: 2 - Medium | Urgency: 2 - Medium | Priority: 3 - Moderate |
| 2 - Medium | 1 - High | 2 - High | Impact: 1 - High | Urgency: 2 - Medium | Priority: 2 - High |
| 2 - Medium | 2 - Medium | 3 - Moderate | Impact: 2 - Medium | Urgency: 2 - Medium | Priority: 3 - Moderate |
| 2 - Medium | 3 - Low | 4 - Low | Impact: 2 - Medium | Urgency: 2 - Medium | Priority: 3 - Moderate |
| 3 - Low | 1 - High | 3 - Moderate | Impact: 2 - Medium | Urgency: 2 - Medium | Priority: 3 - Moderate |
| 3 - Low | 2 - Medium | 4 - Low | Impact: 2 - Medium | Urgency: 2 - Medium | Priority: 3 - Moderate |
| 3 - Low | 3 - Low | 5 - Planning | Impact: 2 - Medium | Urgency: 2 - Medium | Priority: 3 - Moderate |

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

Figure 57: Impact and Urgency States

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

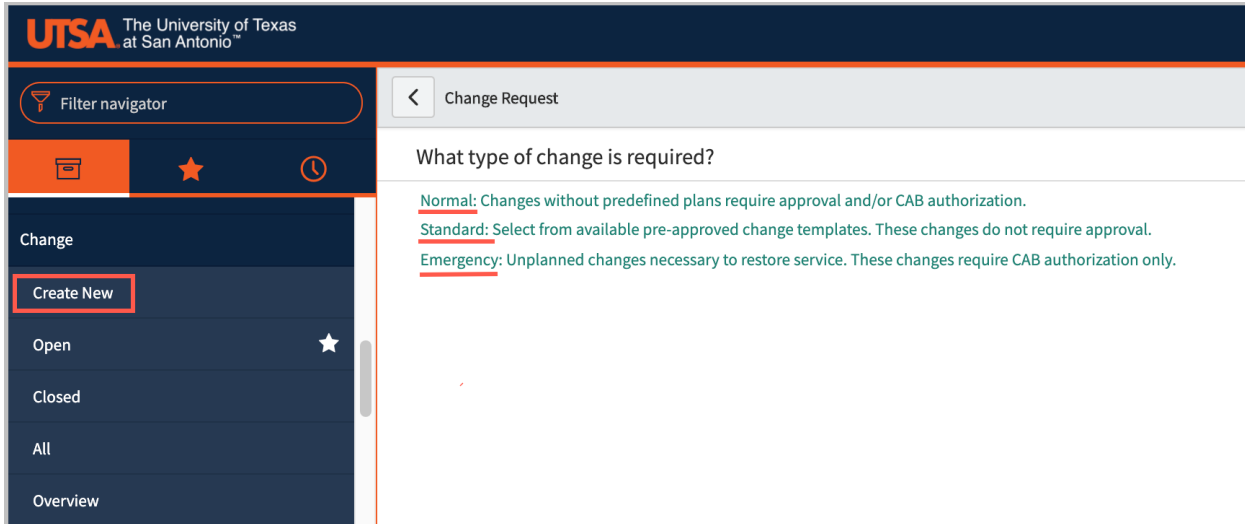
Canceled – Change is canceled

| 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.

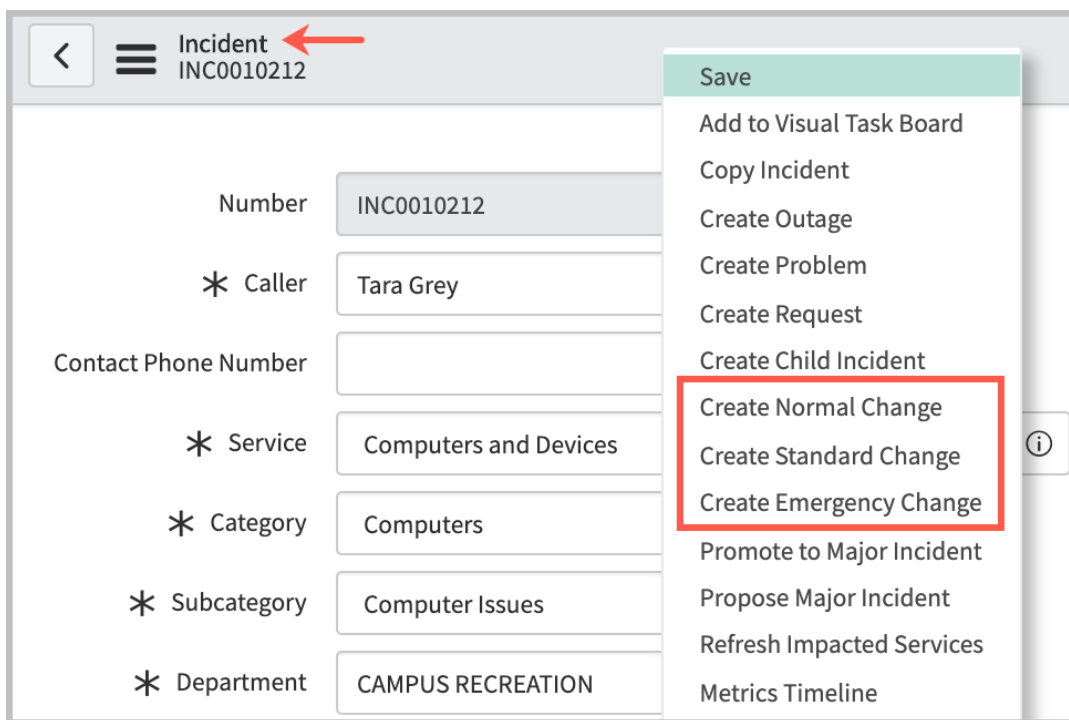


Figure 59: Create a Change Request from an Incident

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

The screenshot displays the 'Normal Change Form' interface. At the top, there is a header bar with a back arrow, a menu icon, the text 'Change Request New record', and a 'Submit' button. Below the header is a horizontal navigation bar with tabs: 'New', 'Assess', 'Authorize', 'Scheduled', 'Implement', 'Review', 'Closed', and 'Canceled'. The 'New' tab is currently selected.

The form contains several input fields and dropdown menus arranged in two columns:

- Number:** A text field containing 'CHG0030066'.
- Type:** A dropdown menu set to 'Normal'.
- Requested by:** A text field containing 'ITIL User' with a search icon and an information icon.
- State:** A dropdown menu set to 'New'.
- * Service:** A dropdown menu set to 'Security and Public Safety' with a search icon and an information icon.
- Conflict status:** A text field containing 'Not Run'.
- Category:** A dropdown menu set to 'Building Access'.
- Conflict last run:** A text field.
- Configuration item:** A text field with a search icon.
- Assignment group:** A text field with a search icon.
- Priority:** A dropdown menu set to '3 - Moderate'.
- Assigned to:** A text field with a search icon.
- Risk:** A dropdown menu set to 'Low'.
- Impact:** A dropdown menu set to '2 - Medium'.
- Short description:** A text field with a lightbulb icon and a document icon.
- Description:** A larger text area.

Figure 60: Normal Change Form

The screenshot displays the Change Request Form with the 'Planning' tab selected. The form is divided into two main sections: 'Planning' and 'Schedule'. The 'Planning' section includes fields for 'Justification', 'Implementation plan', and 'Risk and impact analysis'. The 'Schedule' section includes fields for 'Planned start date', 'Planned end date', 'CAB date', 'Actual start date', 'Actual end date', 'CAB delegate', and 'CAB recommendation'. A blue notification box at the top of the 'Schedule' section states: 'Planned start date and Planned end date are the requested change window'.

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

< Service Catalog > Standard Changes 20 per page Search catalog

Standard Changes

Standard Change Template Library

Related Categories

Hardware Asset ←

Order from a variety of hardware to meet your business needs, including phones, tablets, printers and laptops.

Network Standard Changes ←

Standard change templates relating to network related changes: Adding new switches, upgrading IOS etc

Server Standard Changes ←

Standard change templates related to servers and attached storage. Reboot server, increase size of storage LUN etc

Template Management ←

Propose a new Standard Change Template. Modify or Retire an existing Standard Change Template.

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**.

The screenshot shows the 'Template Management' page in a Service Catalog. The breadcrumb navigation at the top reads 'Service Catalog > Standard Changes > Template Management'. There is a '20 per page' dropdown and a 'Search catalog' search bar. The main heading is 'Template Management' with a subtext: 'Propose a new Standard Change Template. Modify or Retire an existing Standard Change Template.' Below this is a table with three items:

| Items | |
|--------------------------|--|
| <input type="checkbox"/> | Propose a new Standard Change Template ▼ Preview <p>Standard Changes are those with repeatable implementation steps that have a proven history of success and are considered by Change Management to be low risk. Use this request to propose a Standard Change for your Change Management team to confirm.</p> |
| <input type="checkbox"/> | Modify a Standard Change Template ▼ Preview <p>Request alterations to an existing Standard Change Template. These changes will be confirmed by your Change Management team.</p> |
| <input type="checkbox"/> | Retire a Standard Change Template ▶ Preview |

Figure 62: Template Management

Change Request
New record

Submit

New Assess Authorize Scheduled Implement Review Closed Canceled

Number CHG0030068 Type Normal

Requested by ITIL User State New

* Service Access, Accounts & Internet Conflict status Not Run

Category Internet Conflict last run

Configuration item Assignment group Network

Priority 3 - Moderate Assigned to

Risk Moderate

Impact 2 - Medium

Short description Reboot all internet devices

Description

Figure 63: Normal Change Form

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

Planning Schedule Conflicts Notes Closure Information

Justification Justification of the Change goes here.

Implementation plan Document the Implementation Plan.

Risk and impact analysis Note any Risks identified and document findings of any impact analysis completed.

Backout plan Document the Backout Plan if the Change is not able to take place.

Test plan What is the plan for testing.

Figure 64: Planning Tab

Planning | **Schedule** | Conflicts | Notes | Closure Information

Planned start date and Planned end date are the requested change window

Planned start date: 2020-07-28 10:00:00

Planned end date: 2020-07-29 17:00:00

CAB date:

Actual start date:

Actual end date:

CAB delegate:

CAB recommendation:

Figure 65: Schedule Tab

CHECKING FOR CONFLICTS

Next, check for **Conflicts**.

Planning | Schedule | **Conflicts** | Notes | Closure Information

Check Conflicts

Conflicts Detected

| | Affected CI | Impacted Service | Type | Schedule | Conflicting change | Last checked |
|--|-------------|------------------|------|----------|--------------------|--------------|
| | | | | | | |

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

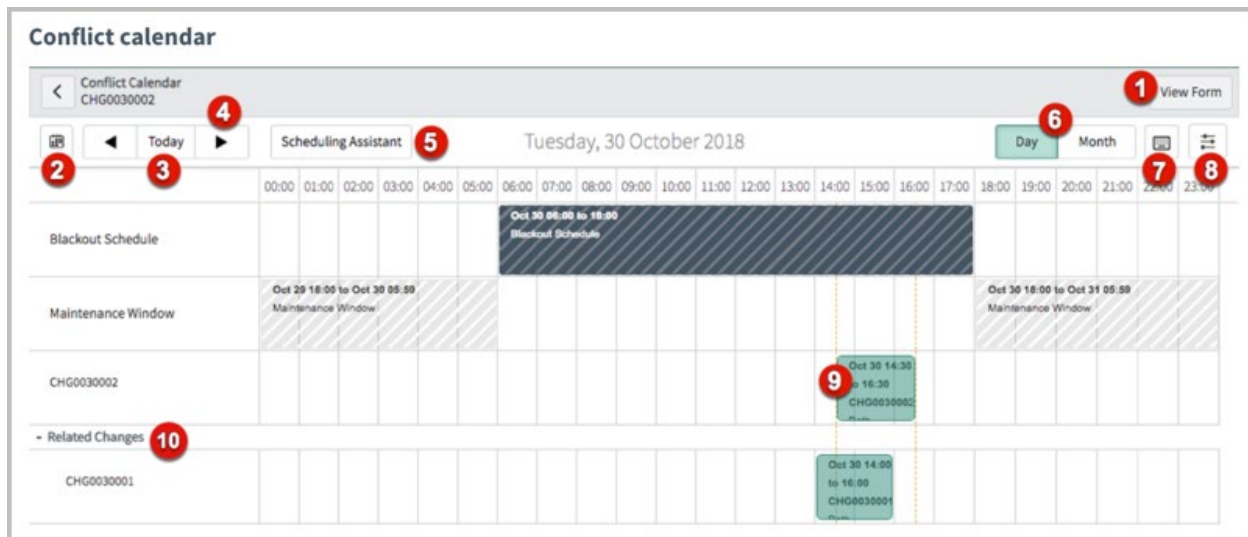
If conflicts are identified, the **Conflict status** field is updated to reflect a conflict and an error message directs you to the **Conflict form** section of the **Change request** form to review conflicts.

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.

The screenshot displays the 'Conflicts Calendar' interface for change request CHG0030068. The top navigation bar includes a 'Conflict Calendar' button, which is highlighted with a red box. Below the navigation bar, a progress bar shows the stages: New, Assess, Authorize, Scheduled, Implement, Review, Closed, and Canceled. The main form area contains fields for Number (CHG0030068), Type (Normal), Requested by (ITIL User), State (New), Service (Access, Accounts & Internet), and Conflict status (Conflict). Below this, the 'Conflict Calendar' section shows a timeline for Tuesday, 28 July 2020. The timeline includes a 'Blackout Schedule' from Jul 28 19:00 to Jul 29 19:00 and a 'Maintenance Window' from Jul 28 10:00 to Jul 29 17:00. A conflict is identified between the blackout schedule and the change request 'CHG0030068 Reboot all internet devices' which is scheduled for the same time period.

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.

The screenshot displays the 'Change Request' interface for request CHG0030068. At the top, a yellow notification bar states: 'Scheduling conflict detected. Use the Scheduling Assistant to avoid conflicts.' Below this is a workflow bar with steps: New, Assess, Authorize, Scheduled, Implement, Review, Closed, and Canceled. The 'Schedule' tab is active, showing a blue box with the text: 'Planned start date and Planned end date are the requested change window'. Below this, there are three date/time input fields: 'Planned start date' (2020-07-30 09:00:00), 'Planned end date' (2020-07-30 17:00:00), and 'CAB date' (empty). At the bottom, a 'Checking conflicts' dialog box is shown with a progress bar labeled 'Conflict Detection'. A red arrow points to the end of the bar, with the text 'The conflict check is complete'. A 'Close' button is in the bottom right corner of the dialog.

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.

Related Links

Risk Assessment
Calculate Risk
Show Workflow

Change Tasks
Approvers
Prob

Change Tasks
New

Change request = CHG0030

* Does the change affect a critical CI or Business service?

☐ Critical
☒ Somewhat critical
☐ Not critical

* How Complex is the Change (where complexity is a function of number of impacted CIs, number of tasks involved, number of teams involved)?

☐ Complex
☐ Somewhat complex
☐ Easy

* How difficult is the change to back out or revert?

☐ Complex
☐ Somewhat complex
☐ Easy

* Is there a redundancy plan in place?

☐ Yes
☐ No

* How difficult is it to verify the change was successful?

☐ Difficult
☐ Moderate
☐ Easy

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.)

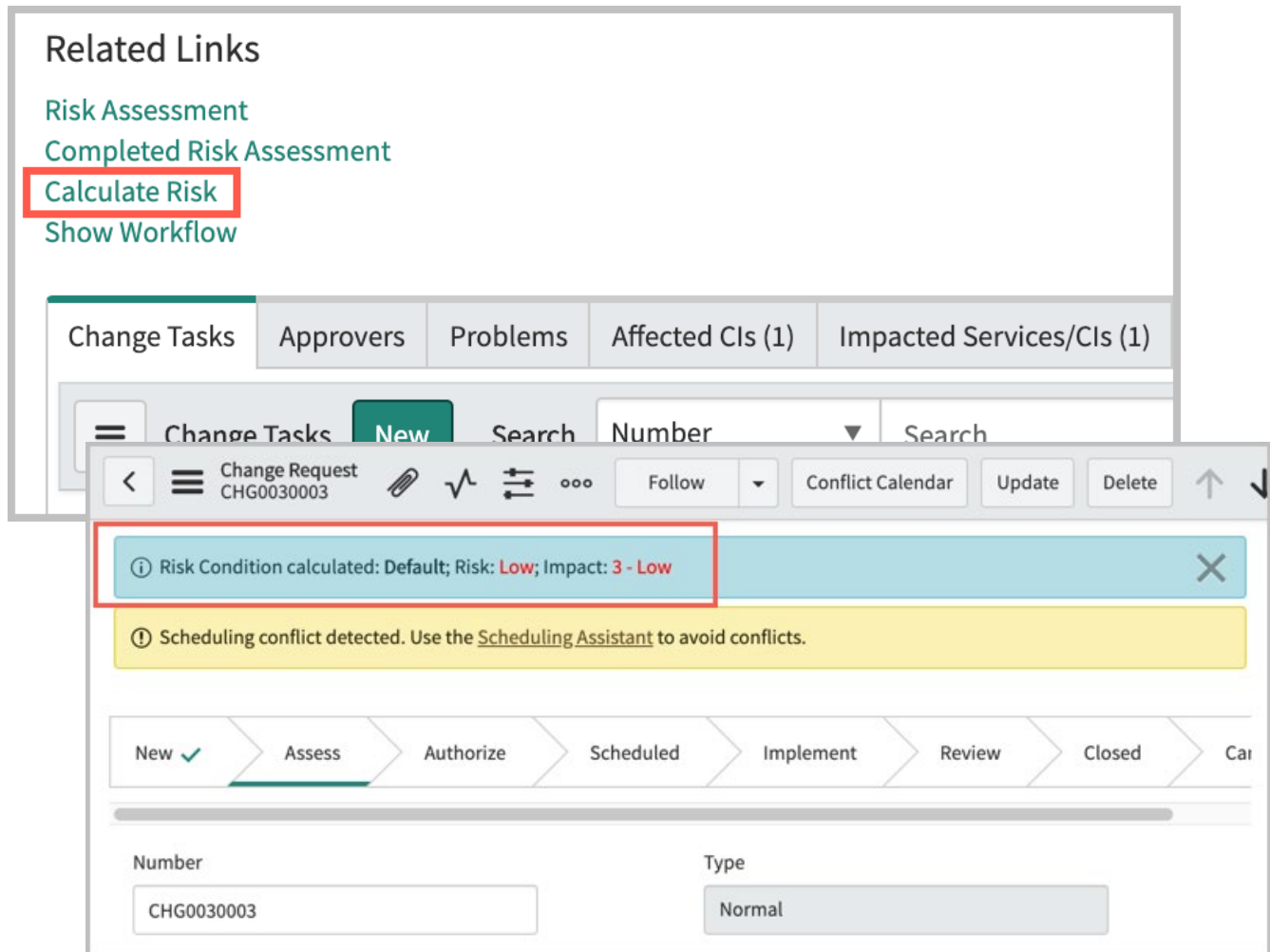
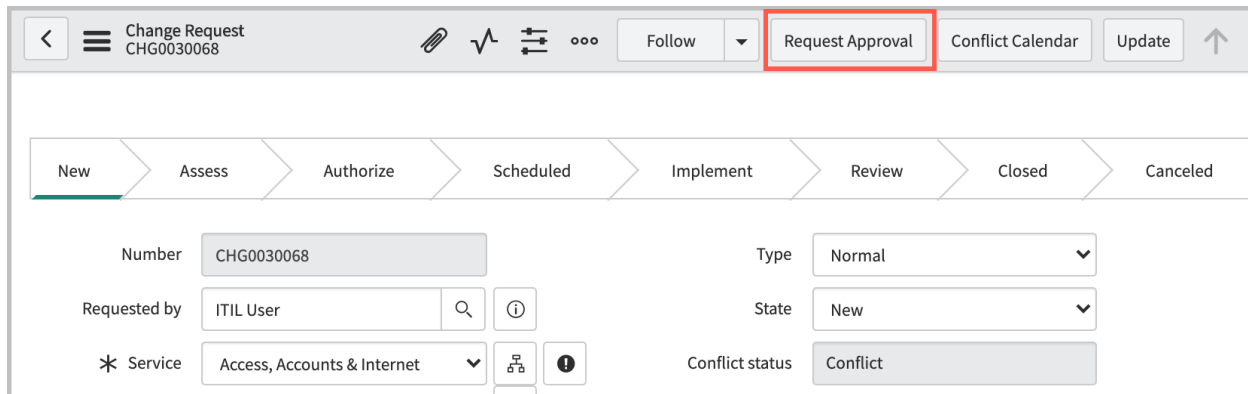


Figure 70: Calculate risk without filling out Risk Assessment

REQUEST APPROVAL FROM CAB

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



The screenshot shows the top section of a Change Request form for request CHG0030068. The 'Request Approval' button is highlighted with a red rectangle. Below the header is a progress bar with stages: New, Assess, Authorize, Scheduled, Implement, Review, Closed, and Canceled. The 'New' stage is currently active. Below the progress bar, there are input fields for 'Number' (CHG0030068), 'Type' (Normal), 'Requested by' (ITIL User), 'State' (New), 'Service' (Access, Accounts & Internet), and 'Conflict status' (Conflict).

Figure 71: Request Approval Button

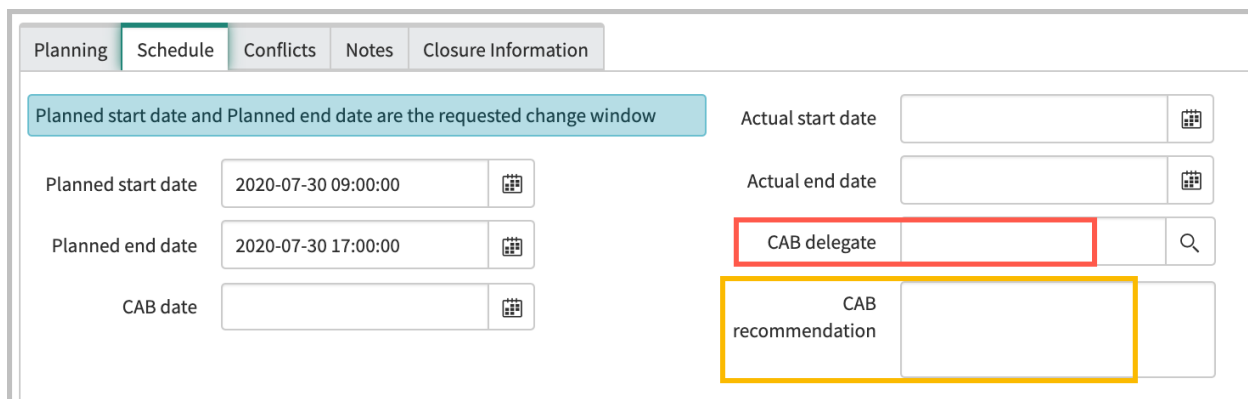


Note: Many fields are mandatory before you can click **Request Approval**.

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.



The screenshot shows the 'Schedule' tab of the Change Request form. It includes a header with tabs: Planning, Schedule, Conflicts, Notes, and Closure Information. A blue banner states: 'Planned start date and Planned end date are the requested change window'. Below this, there are date and time pickers for 'Planned start date' (2020-07-30 09:00:00), 'Planned end date' (2020-07-30 17:00:00), and 'CAB date'. On the right side, there are fields for 'Actual start date', 'Actual end date', 'CAB delegate' (highlighted with a red box), and 'CAB recommendation' (highlighted with a yellow box).

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**.

The screenshot displays the 'Approvers' tab for change request CHG0030003. The table below shows the approval status for each approver:

| State | Approver | Assignment group | Created |
|--------------------|-------------|------------------|---------------------|
| No Longer Required | ITIL User | Network | 2019-07-21 21:01:25 |
| Approved | Fred Luddy | Network | 2019-07-21 21:01:25 |
| No Longer Required | Bow Ruggeri | Network | 2019-07-21 21:01:25 |
| No Longer Required | David Loo | Network | 2019-07-21 21:01:25 |
| Approved | Bow Ruggeri | (empty) | 2019-07-21 21:14:23 |

Below the table, the workflow progress bar shows the following steps: New ✓, Assess ✓, Authorize ✓, **Scheduled**, Implement, Review, Closed, and Canceled. The 'Scheduled' step is currently active.

At the bottom, the change request details are shown:

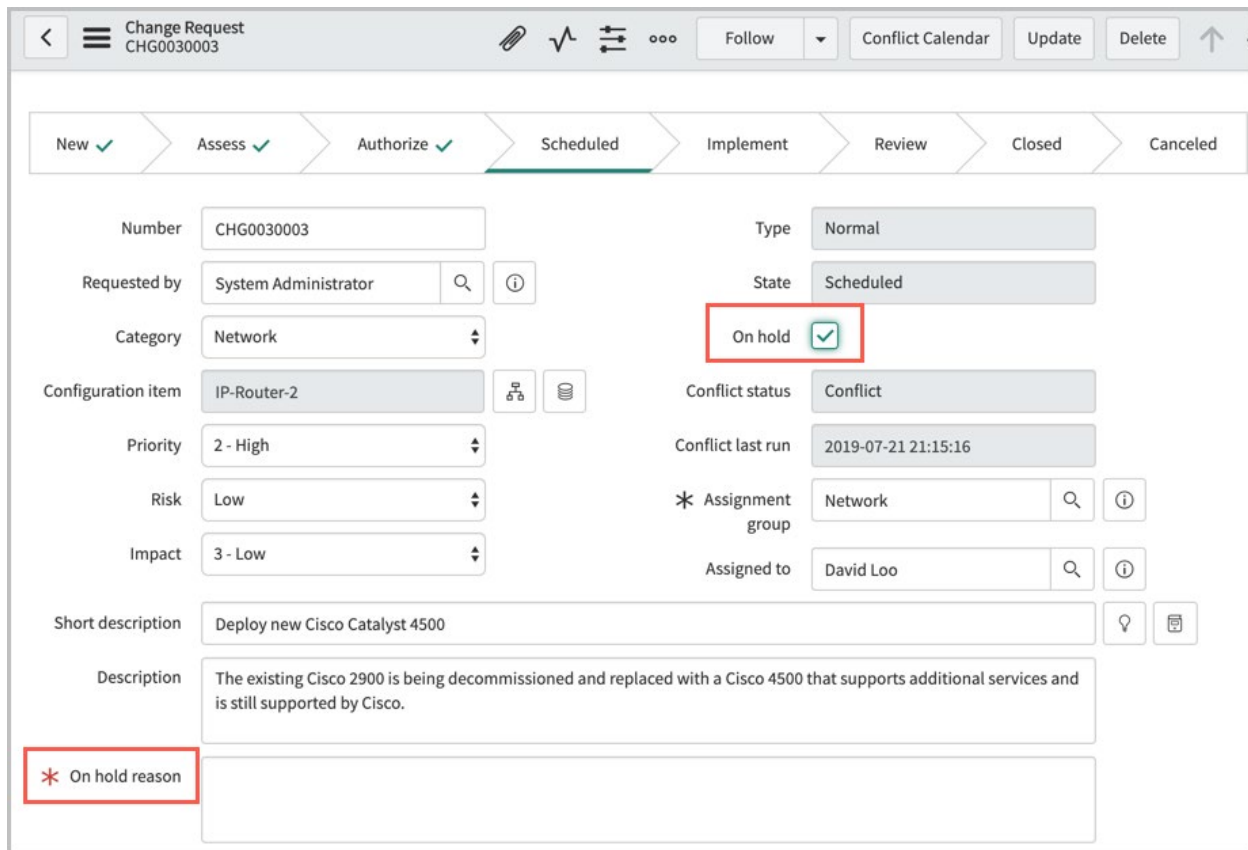
- Number: CHG0030003
- Type: Normal
- Requested by: System Administrator
- State: Scheduled

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 not in the **New**, **Canceled**, or **Closed** state.



The screenshot shows the 'Change Request' interface for request CHG0030003. The top navigation bar includes a back arrow, a menu icon, the title 'Change Request CHG0030003', and action buttons: 'Follow', 'Conflict Calendar', 'Update', 'Delete', and an up arrow. Below this is a progress bar with states: New (checked), Assess (checked), Authorize (checked), **Scheduled** (active), Implement, Review, Closed, and Canceled. The main form contains fields for: Number (CHG0030003), Type (Normal), Requested by (System Administrator), State (Scheduled), Category (Network), On hold (checked), Configuration item (IP-Router-2), Conflict status (Conflict), Priority (2 - High), Conflict last run (2019-07-21 21:15:16), Risk (Low), * Assignment group (Network), Impact (3 - Low), Assigned to (David Loo), Short description (Deploy new Cisco Catalyst 4500), and Description (The existing Cisco 2900 is being decommissioned and replaced with a Cisco 4500 that supports additional services and is still supported by Cisco.). At the bottom, there is a red-bordered box labeled '* On hold reason' with an empty text area below it.

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.

Change Request CHG0030003

Follow Implement Conflict Calendar Update Delete

New ✓ Assess ✓ Authorize ✓ Scheduled **Implement** Review Closed Canceled

Number: CHG0030003 Type: Normal

Requested by: System Administrator State: Scheduled

Category: Network On hold: ☐

Configuration item: IP-Router-2 Conflict status: No Conflict

Priority: 2 - High Conflict last run: 2019-07-23 19:24:03

Figure 75: Implement a change

Affected CIs (1) Impacted Services/CIs Approvers (6) **Change Tasks (2)** Problems Incidents Fixed By Change Incidents Caused By Change

Change Tasks New Search Number Search 1

Change request = CHG0030003

| | Number | Short description | Type | State | Planned start date | Planned end date | Assignment group |
|--------------------------|--------------|-----------------------------|----------|-------|--------------------|------------------|------------------|
| <input type="checkbox"/> | CTASK0010001 | Post implementation testing | Planning | Open | (empty) | (empty) | (empty) |
| <input type="checkbox"/> | CTASK0010002 | Implement | Planning | Open | (empty) | (empty) | (empty) |

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.

Change Request CHG0030003

Follow Close Conflict Calendar Update Delete

New ✓ Assess ✓ Authorize ✓ Scheduled ✓ Implement ✓ **Close** Review Closed Canceled

Number: CHG0030003 Type: Normal

Requested by: System Administrator State: Review

Category: Network On hold: ☐

Configuration item: IP-Router-2 Conflict status: No Conflict

Priority: 2 - High Conflict last run: 2019-07-23 20:05:15

Figure 77: Close button

Planning Schedule Conflicts Notes **Closure Information**

* Close code Successful

* Close notes The change was implemented without any issues.

-- None --
 ✓ Successful
 Successful with issues
 Unsuccessful

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**.

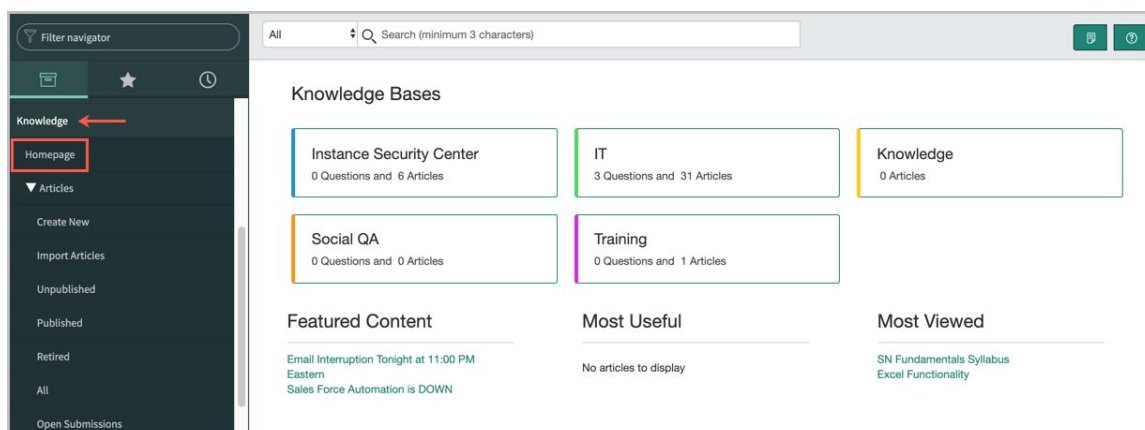


Figure 79: Knowledge Base Homepage

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.

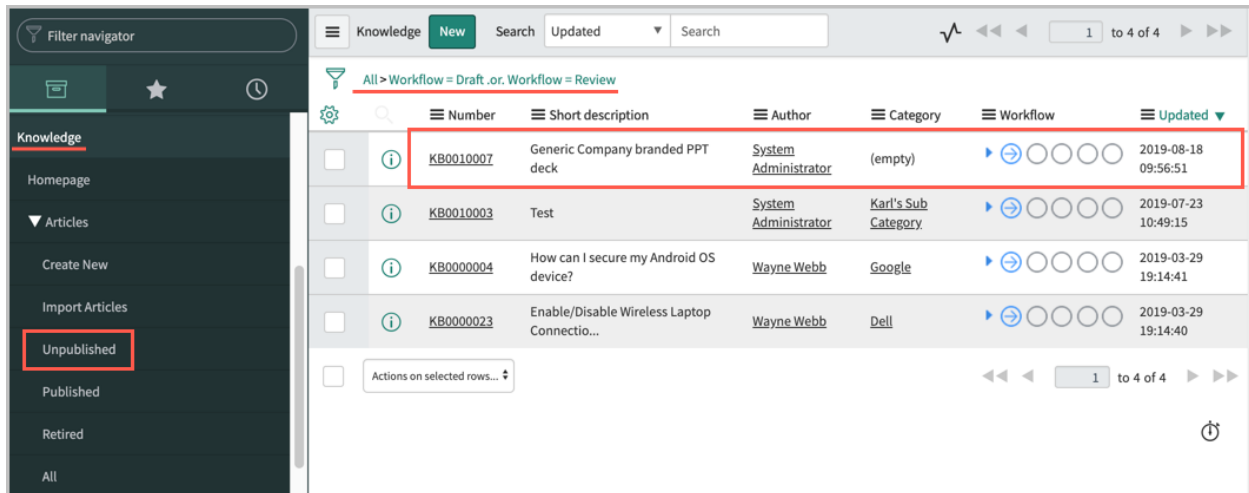


Figure 82: an unpublished article

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**.

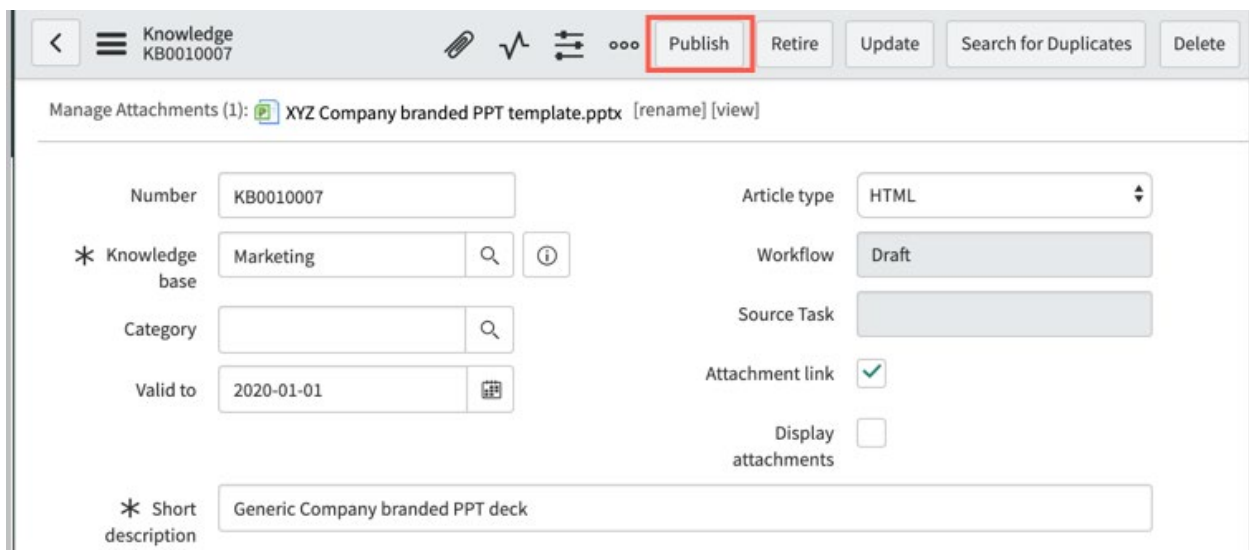


Figure 83: Publishing an article to the Approval State

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**.

The screenshot shows the 'Knowledge New record' form. At the top right, there is a paperclip icon and a 'Submit' button, both highlighted with red boxes. Below the header, the 'Manage Attachments (1):' section is highlighted with a red box, showing a file named 'XYZ Company branded PPT template.pptx' with '[rename][view]' links. The form contains several input fields: 'Number' (KB0010007), 'Knowledge base' (Marketing), 'Category', 'Valid to' (2020-01-01), 'Article type' (HTML), 'Workflow' (Draft), 'Source Task', and 'Attachment link' (checked). There is also a 'Search for Duplicates' button on the right.

Figure 84: Attaching files to knowledge articles

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

Knowledge KB0010007

Manage Attachments (1): XYZ Company branded PPT template.pptx [rename] [view]

Number: KB0010007

* Knowledge base: Marketing

Category:

Published: 2019-08-18

Valid to: 2020-01-01

* Short description: Generic Company branded PPT deck

Article type: HTML

Workflow: Published

Source Task:

Attachment link: ☐

Display attachments: ☒

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**.

Filter navigator

Knowledge

Homepage

Articles

Create New

Import Articles

Unpublished

Published

Retired

All

Import Articles

Import

* Knowledge Base: IT

Category: Email

* Import a Word File

Drag and drop DOC or DOCX files here or

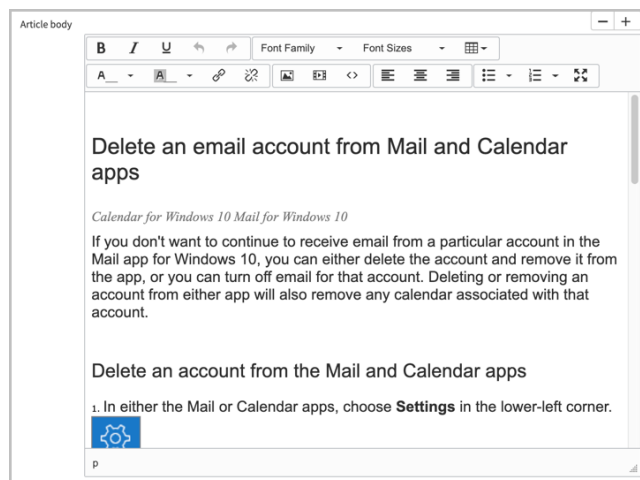
Browse Files

Article 1

How to Delete an email account from Mail apps

Imported Document: How to Delete an email account from Mail apps.DOCX

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**.

Incident INC0000049

Number: INC0000049

Caller: Beth Anglin

Category: Network

Subcategory: -- None --

Business service:

Configuration item: nyc rac nas200

Contact type: Phone

State: In Progress

Impact: 2 - Medium

Urgency: 1 - High

Priority: 2 - High

Assignment group: Hardware

Assigned to: Don Goodliffe

Short description: Network storage unavailable

Buttons: Follow, Update, **Resolve**, Delete

Notes | Related Records | **Resolution Information**

Knowledge ☒

Resolved by: Don Goodliffe

Resolved: 2019-08-19 23:01:22

Resolution code: Solved (Permanently)

Resolution notes: Rebooted Sharepoint server and laptop and the network connected upon starting back up.

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**.

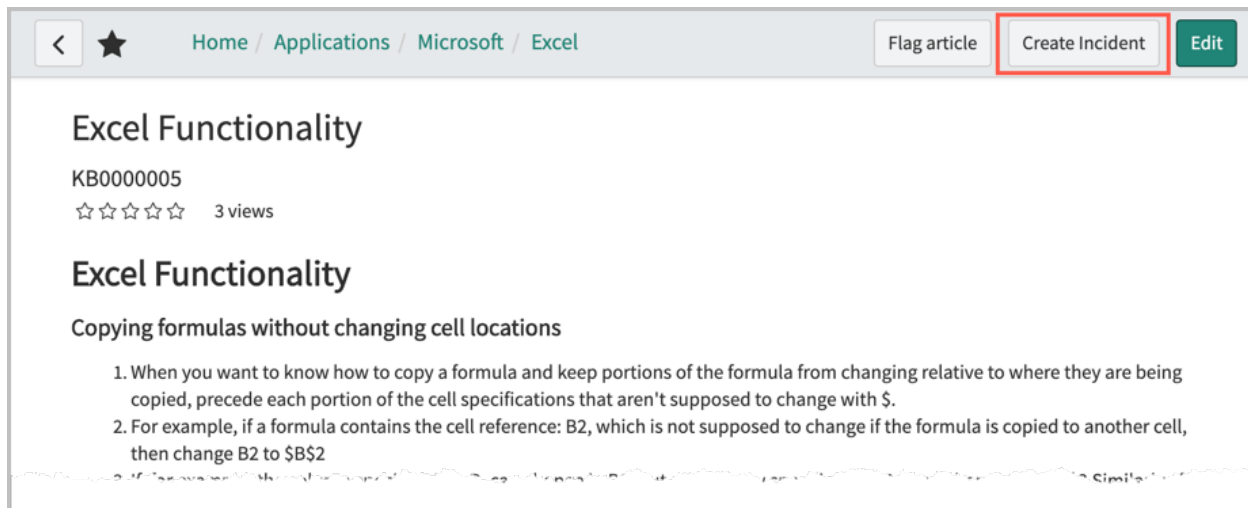


Figure 89: Create an incident from an article in the frameset

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.

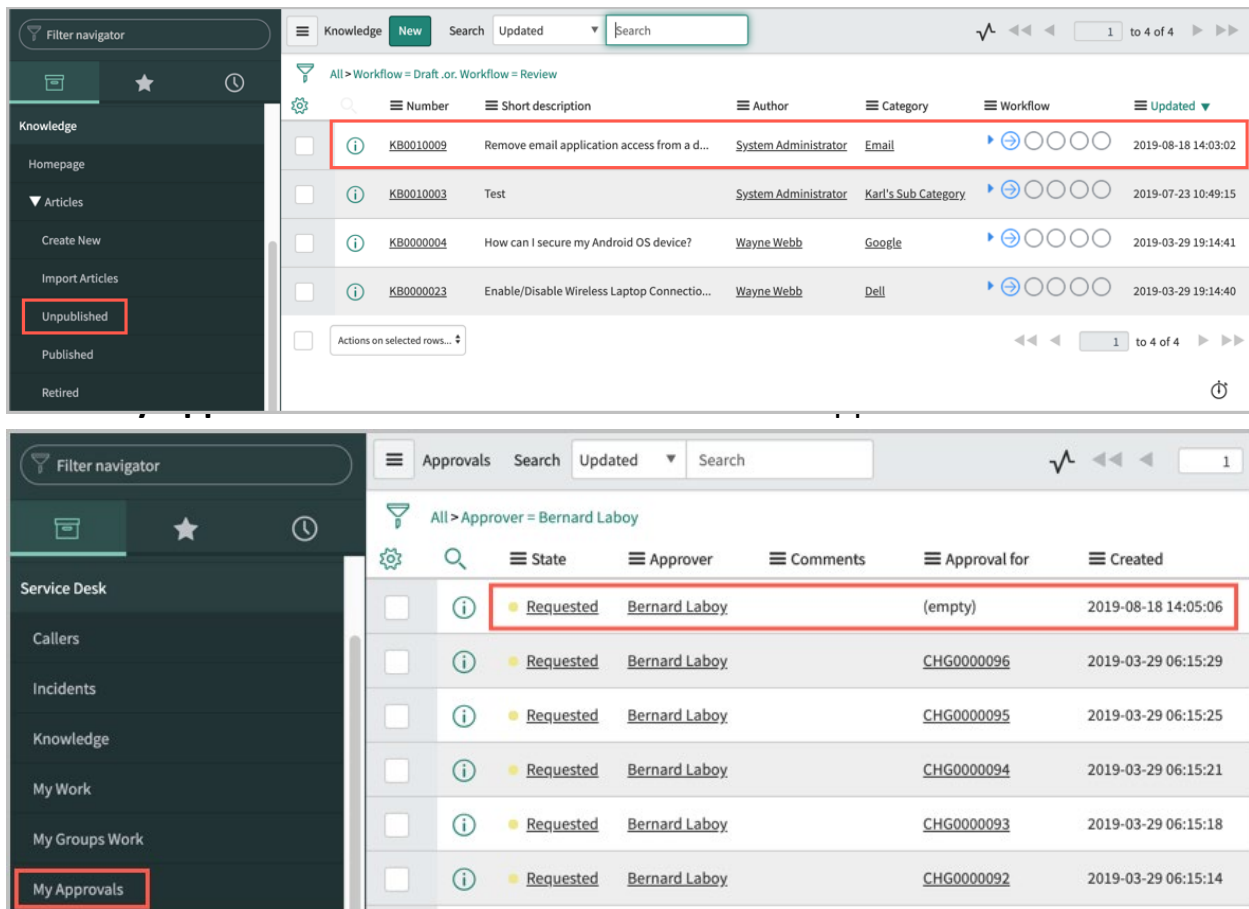


Figure 91: My approvals module

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**.

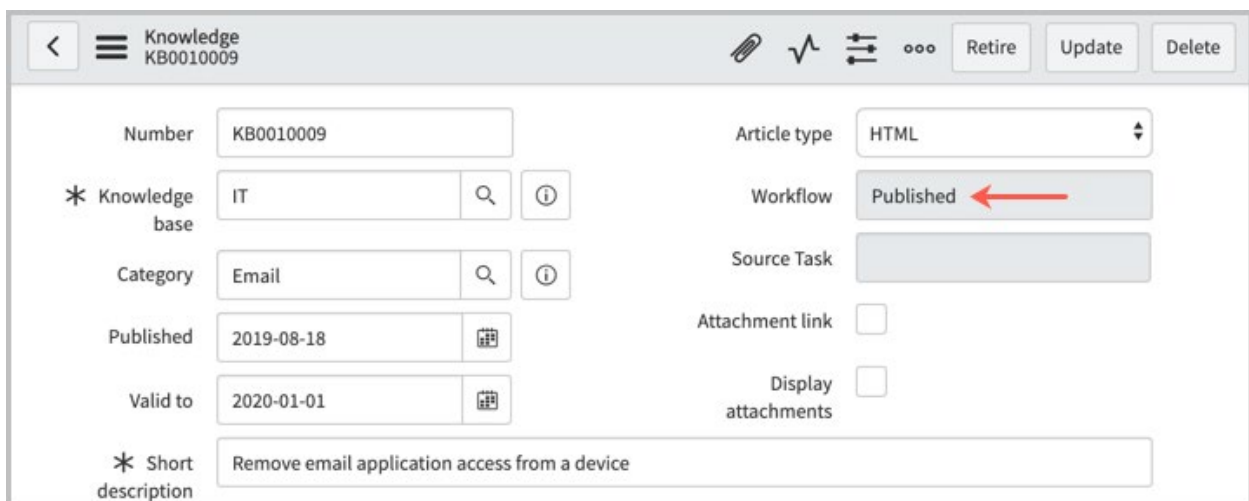
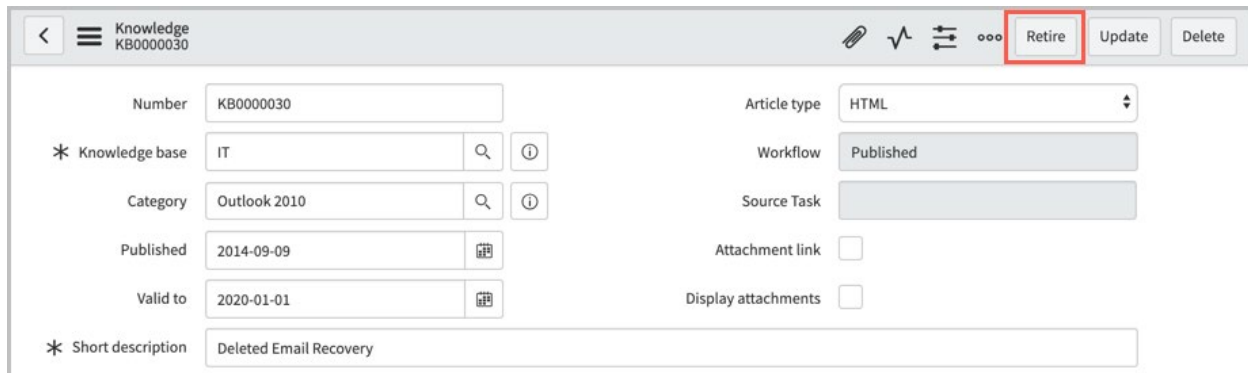


Figure 92: Published workflow state

UPDATING ARTICLES/ARTICLE RETIREMENT

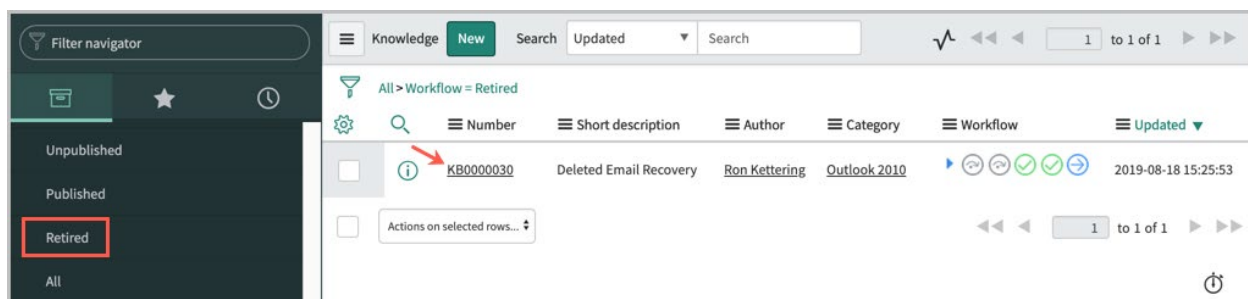
When applicable, the author of the article will click **Retire** to retire the article. The **Knowledge Owner/Manager** will need to approve the retirement of the article.



The screenshot shows the 'Knowledge' application interface for article KB0000030. The 'Retire' button in the top right corner is highlighted with a red box. The form includes fields for Number (KB0000030), Knowledge base (IT), Category (Outlook 2010), Published date (2014-09-09), Valid to date (2020-01-01), Article type (HTML), Workflow (Published), Source Task, Attachment link, Display attachments, and Short description (Deleted Email Recovery).

Figure 93:Retiring an article

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



The screenshot shows the 'Retired' module of the Knowledge application. The left sidebar has 'Retired' highlighted in red. The main area displays a table of retired articles. A red arrow points to the first article, KB0000030.

| | Number | Short description | Author | Category | Workflow | Updated |
|--------------------------|-----------|------------------------|---------------|--------------|-----------|---------------------|
| <input type="checkbox"/> | KB0000030 | Deleted Email Recovery | Ron Kettering | Outlook 2010 | Published | 2019-08-18 15:25:53 |

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.

Related Links
[View Article](#)
[Run User Criteria Diagnostics](#)

Affected Products Knowledge Feedback (8) Knowledge Feedback Tasks Approvals Article Versions (1)

Knowledge Feedback Search for text Search 1 to 8 of 8

Article = KB0000010 v1.0

| | Created | Comments | Rating | Flagged | Useful |
|--------------------------|-------------------------------------|---|--------|---------|--------|
| <input type="checkbox"/> | 2019-10-16 19:10:23 | | 4 | false | |
| <input type="checkbox"/> | 2019-10-16 19:13:29 | | | false | No |
| <input type="checkbox"/> | 2019-10-16 19:13:22 | Adding comment #3 from the End User view... | 2 | false | |
| <input type="checkbox"/> | 2019-10-16 19:08:21 | Leaving Comment #1 here | | false | |
| <input type="checkbox"/> | 2019-10-16 19:09:48 | Leave comment #2 to flag here | | true | |
| <input type="checkbox"/> | 2019-10-16 19:09:20 | Response to comment #1 here | | false | |
| <input type="checkbox"/> | 2019-10-16 19:08:06 | The reason I flagged this article goes h... | | true | |
| <input type="checkbox"/> | 2019-10-16 19:10:30 | | | false | Yes |

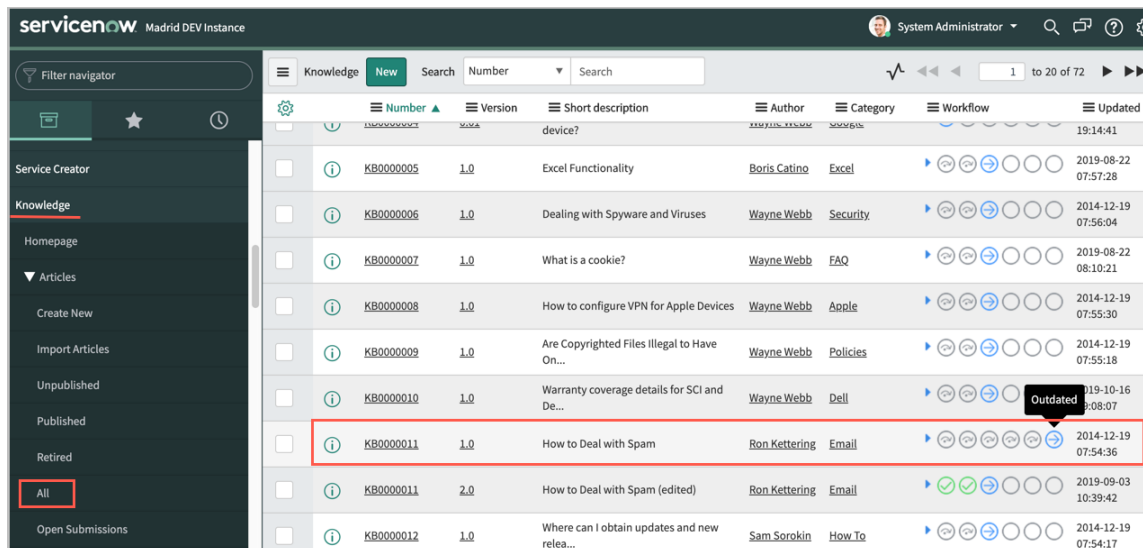
Figure 95: Knowledge Feedback Tab view

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.



| | Number | Version | Short description | Author | Category | Workflow | Updated |
|--|-----------|---------|---|---------------|----------|----------|---------------------|
| | KB0000005 | 1.0 | Excel Functionality | Boris Catino | Excel | | 2019-08-22 07:57:28 |
| | KB0000006 | 1.0 | Dealing with Spyware and Viruses | Wayne Webb | Security | | 2014-12-19 07:56:04 |
| | KB0000007 | 1.0 | What is a cookie? | Wayne Webb | FAQ | | 2019-08-22 08:10:21 |
| | KB0000008 | 1.0 | How to configure VPN for Apple Devices | Wayne Webb | Apple | | 2014-12-19 07:55:30 |
| | KB0000009 | 1.0 | Are Copyrighted Files Illegal to Have On... | Wayne Webb | Policies | | 2014-12-19 07:55:18 |
| | KB0000010 | 1.0 | Warranty coverage details for SCI and De... | Wayne Webb | Dell | | 2019-10-16 08:07:08 |
| | KB0000011 | 1.0 | How to Deal with Spam | Ron Kettering | Email | | 2014-12-19 07:54:36 |
| | KB0000011 | 2.0 | How to Deal with Spam (edited) | Ron Kettering | Email | | 2019-09-03 10:39:42 |
| | KB0000012 | 1.0 | Where can I obtain updates and new relea... | Sam Sorokin | How To | | 2014-12-19 07:54:17 |

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**

The screenshot shows a web interface for managing knowledge ownership groups. On the left is a green sidebar with a search bar and navigation links: Knowledge, Homepage, Articles, Ownership Groups (expanded), Manage Group (highlighted with a red arrow), My Approvals, My Pending Group Requests, All Groups, Feedback Management, and Knowledge Blocks. The main content area is titled '> Manage Knowledge Ownership Group'. It features a 'Catalog Item for managing knowledge ownership group' section with an 'Order this Item' button (labeled 'Order Now' in a red box). Below this is a 'Choose request type' section with two options: 'Create ownership group' (selected) and 'Edit ownership group'. The 'Request Type' is set to 'Create Ownership Group'. The 'Name' field contains 'HR Policies'. The 'Manager' field contains 'Beth Anglin'. The 'Group email' field is empty. The 'Group members' field contains 'David Loo, Fred Luddy'. There is a 'Description' field at the bottom.

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**.

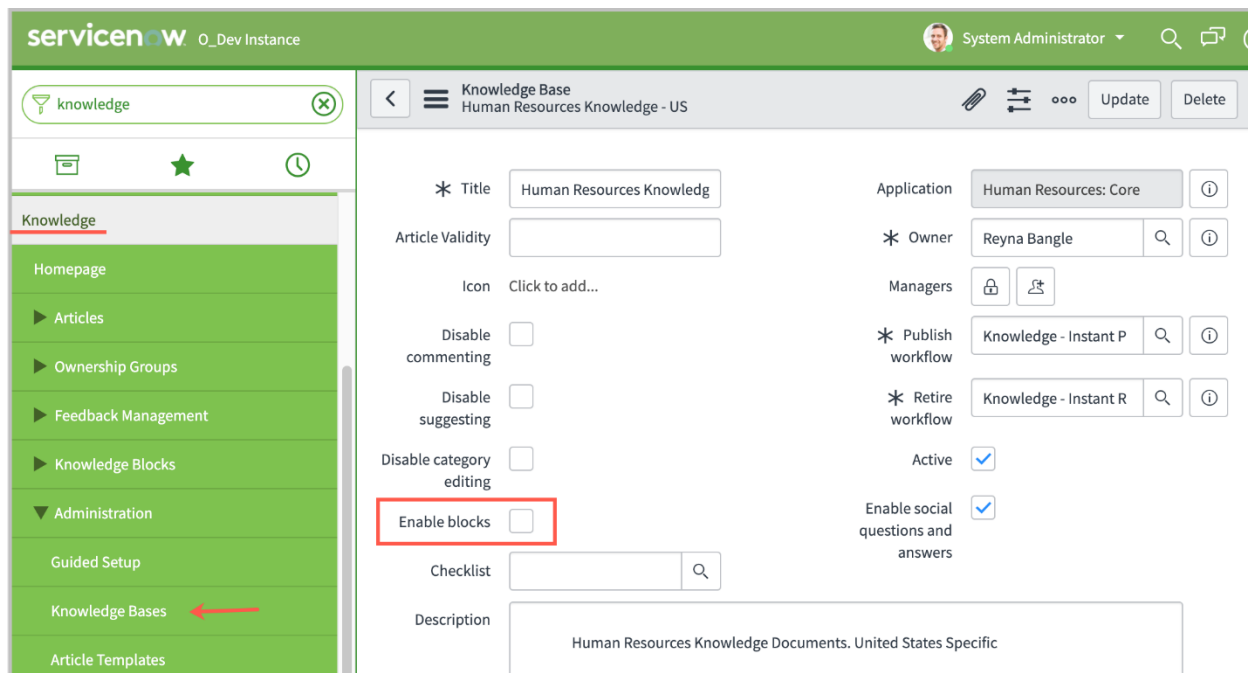


Figure 98: Enable knowledge blocks

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.

The screenshot displays the 'Create New Block' interface. On the left, a sidebar under the 'Knowledge' header shows 'Knowledge Blocks' expanded, with 'Create New Block' selected. The main content area is titled 'Knowledge Block New record'. It includes a top bar with a 'Submit' button. The form contains several fields: 'Number' (KBB0010001), 'Version', 'Knowledge base' (Human Resources Kno), 'Category' (Benefits), 'Article type' (HTML), 'Workflow' (Draft), 'Source Task', 'Can Read', 'Cannot Read', 'Valid to' (2100-01-01), 'Short description' (2020 Medical/Dental/Vision Benefits for USA), and 'Article body' with a rich text editor. A red arrow points to the 'Create New Block' option in the sidebar.

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.

The screenshot displays the 'Create an AQI checklist' interface. On the left is a green sidebar menu with the following items: 'Knowledge' (selected), 'Homepage', 'Articles', 'Administration', 'Article Quality Index' (expanded), 'AQI checklists' (highlighted with a red arrow), 'All Completed AQI Checklists', and 'All Pending AQI Checklists'. The main content area has a light gray header with a back arrow, a hamburger menu, the text 'AQI Checklist New record', and icons for attachments, settings, and a 'Submit' button. Below the header are two input fields: 'Checklist' (with a red asterisk icon) and 'Description'.

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.

The screenshot displays two overlapping user interface windows. The top window, titled 'AQI Checklist' and 'HR Knowledge Base Check List', contains a form with a red asterisk icon next to the 'Checklist' label and a text input field containing 'HR Knowledge Base Check List'. Below this is a 'Description' label and a text area containing 'A check list to ensure articles within the HR Knowledge Base are of high quality, current and accurate.' There are 'Update' and 'Delete' buttons. A red line highlights the 'Checklist Questions' tab, and a red box highlights the 'New' button. The bottom window, titled 'Checklist Question' and 'New record', shows a form with a red asterisk icon next to the 'Question' label and a text input field. Below this is a 'Description' label and a text area. At the bottom, there are 'Order' and 'Weight' labels with corresponding text input fields. A blue 'Submit' button is visible in the top right corner of the bottom window.

Figure 101: AQI Checklist Questions