

How to manage Incident tickets in Service-Now.

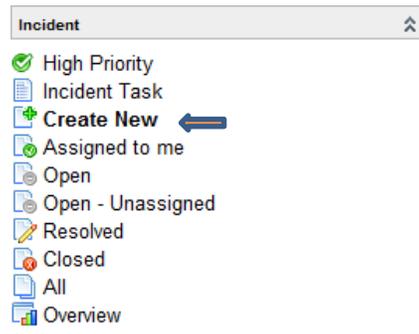
Incident Tickets follow the following life cycle:

New ► Assigned ► Work In Progress ► Pending ► Resolved ► Closed/Cancelled

The guide below outlines the steps to manage an Incident through its lifecycle.

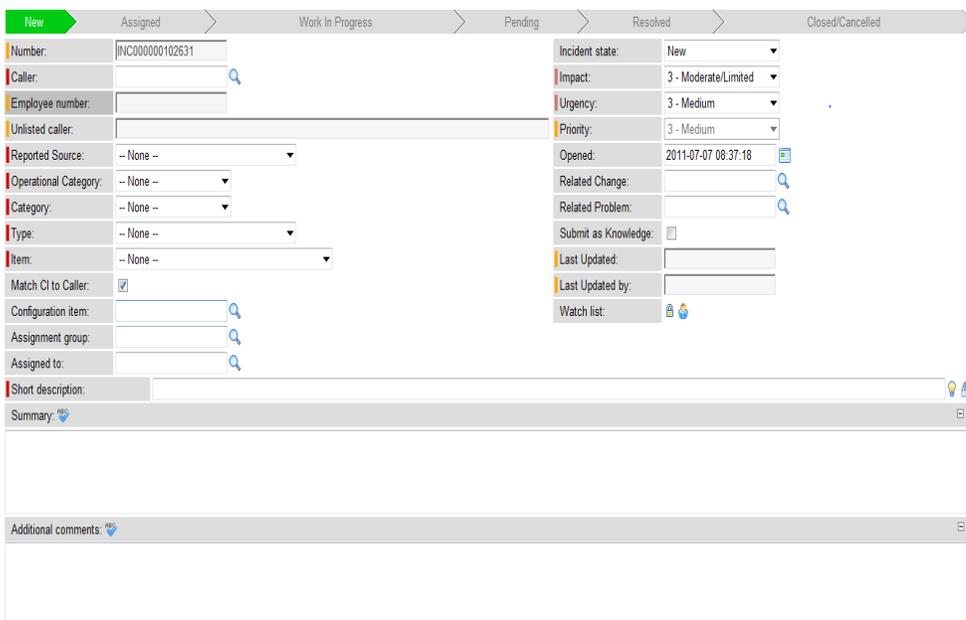
Creating a New Incident Ticket

1. Under Incident Module on left sidebar, click *Create New*.



2. Fill in all appropriate fields. Mandatory fields are designated by a red box. These fields are mandatory throughout all phases of the incident lifecycle.

Note: Please see the end of this document for an explanation of each field.



3. Click *save* or *save and exit*. Save buttons are located on the Incident header and below the vendor ticketing fields.

Incident Header



Incident Header

Incident = Required field

Save & Exit Save Resolve Incident Delete

New Assigned Work In Progress Pending Resolved Closed/Cancelled

Number: INC000000102326 Incident state: Resolved

Incident Form



External Status: Assigned

External Vendor Reported Time:

Save & Exit Save Resolve Incident Delete

Move a ticket into Assigned State

1. Select correct *Assignment Group* and *Assigned to* individual.
2. Fill in all mandatory fields if not already set:
3. Click *save* or *save and exit*.

Note: The ticket will move to assigned after selecting the Assignment Group/Individual and saving the ticket. You can also manually modify the Incident State field to be Assigned.

Moving a ticket in to Work in Progress State

Note: It is a requirement for incident tickets to be acknowledged prior to moving to a resolved state. This is used in the Mean Time to respond (MTTr) metric.

1. Change Incident State to 'Work in Progress.'
2. Click *save* or *save and exit*
3. While the Incident is in this state, record work performed in the 'Additional Comments' field, saving upon each entry.

Moving a ticket in to Pending State

1. Change Incident State to 'Pending.'
2. Update 'Additional comments' with pending reason.
3. Click *save* or *save and exit*

Move a ticket to Resolved State

1. Change Incident State to 'Resolved'
2. Enter information in the mandatory 'Resolution Code' and 'Resolution Notes' fields.



Additional comments: REC

Resolution Code: -- None --

Resolution Notes: REC

3. Click *save* or *save and exit*

Move a ticket to Closed State

Tickets will automatically move to closed state 24 hours after being resolved. There is never a need to manually move an incident to Closed state.

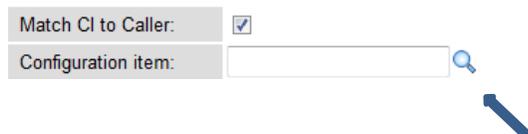
Move a ticket to Cancelled State

1. Change Incident State to 'Cancelled'
2. Click *save* or *save and exit*

Attaching a Configuration Item to an existing Incident Ticket

Note: Assumes there is a name entered in the Caller field.

- To match a Configuration Item (CI) to the caller.
 - a. Click the magnifying glass next to the CI field.



Match CI to Caller:

Configuration item: 

- b. Select the impacted CI.

- c. Click *save* or *save and exit*
- To return a full list of CIs.
 - a. Uncheck the 'Match CI to Caller' field.
 - a. Click the magnifying glass next to the CI field.
 - b. Search for and select impacted CI.

Search by CI Name or Manufacturer

Select CI

Name	Manufacturer
"GNU make 3.80.0"	MinGW
"Minimal SYStem 1.0.10"	MinGW
"Minimal SYStem 1.0.11"	MinGW
"Nero SoundTrax Help"	Nero AG
'Compare Database'	Softinterface, Inc.
'PTC Places' Namespace Shell Extension	PTC
'PTC Places' Namespace Shell Extension	PTC

- c. Click *save* or *save and exit*

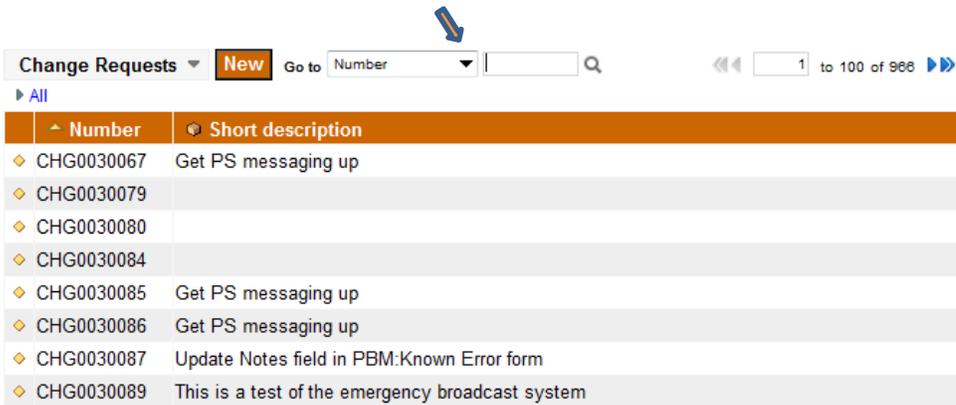
Attaching a related Change Request/Problem investigation to an existing Incident ticket

1. Click the magnifying glass next to the Related Change/Problem field, depending on which you are attaching.

Incident state:	Resolved	▼
Impact:	3 - Moderate/Limited	▼
Urgency:	3 - Medium	▼
Priority:	3 - Medium	▼
Opened:	2011-07-07 10:48:36	
Related Change:	<input type="text"/>	
Related Problem:	<input type="text"/>	
Submit as Knowledge:	<input type="checkbox"/>	
Last Updated:	<input type="text"/>	
Last Updated by:	<input type="text"/>	
Watch list:		

2. Search for and select the related Change or Problem ticket

Search by request
number, text or short
description



Change Requests **New** Go to Number 1 to 100 of 968

▶ All

Number	Short description
CHG0030067	Get PS messaging up
CHG0030079	
CHG0030080	
CHG0030084	
CHG0030085	Get PS messaging up
CHG0030086	Get PS messaging up
CHG0030087	Update Notes field in PBM:Known Error form
CHG0030089	This is a test of the emergency broadcast system

Select
related
record

3. Click *save* or *save and exit*.

Using the Watch List

The watch list allows for interested individuals to be updated on the progress of an incident.

The following notifications are sent to individuals added to the watch list:

- Incident Opened
- Incident Commented
- Incident Resolved

Adding yourself to the watch list:

1. Select the *person* icon next to the Watch list field.



Last Updated:

Last Updated by:

Watch list:   

2. Click *save* or *save and exit*

Adding someone else to the watch list:

1. Select the *lock* icon next to the *Watch list* field.



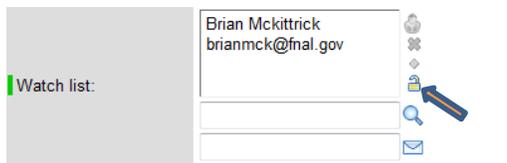
2. Adding people to the watch list:
 - a. Click the magnifying glass, search by name and select the appropriate person.
 - b. Once the record is selected, and the name appears in the watch list field, click the *lock* icon.



- c. You can also enter an address in the email field. Type in the desired email address and click the *email* icon to validate the address.

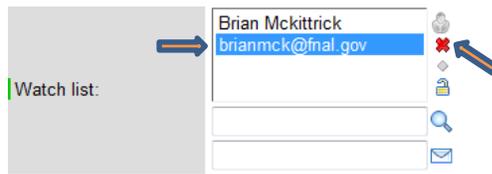


- d. Once the email address is validated, it will be entered to the watch list.
- e. Click the *lock* icon to close the watch list.



3. Removing people from the watch list.
 - a. Click the lock icon next to the watch list field to expand the field.
 - b. Highlight the record to delete.

c. Click the X icon to delete the record.



d. Click the lock icon to close the watch list.

Incident Record Related Lists

After a ticket is saved for the first time, a series of related list will appear at the bottom of the incident form. Below is an explanation of each related list tab.



Incident by same caller: A list of all tickets opened by the caller. This can be quickly accessed for ticket history information.

Incidents: A list of all tickets related to this incident record. For steps on attaching a related incident, please see the next section.

Incident Tasks: This is for future use. This tab will show tasks related to this incident record.

Metrics: The following metrics are system calculated and displayed in this related lists: Create to resolve duration; Assigned to duration; Incident state duration; First Call resolution; and assignment group duration.

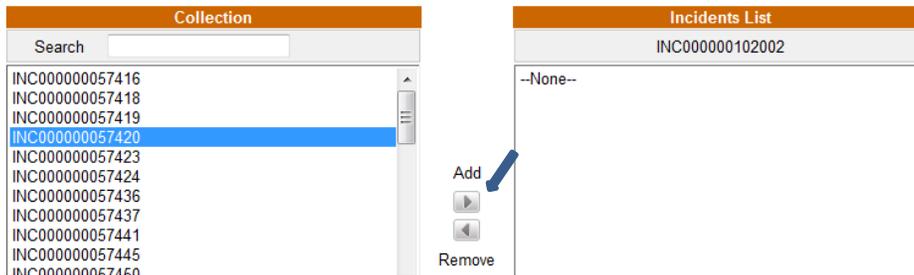
Tasks SLA: A list of associated incident SLAs – Mean Time to respond (MTTr) and Mean Time to Resolve (MTTR)

Attaching a related incident to an existing incident record

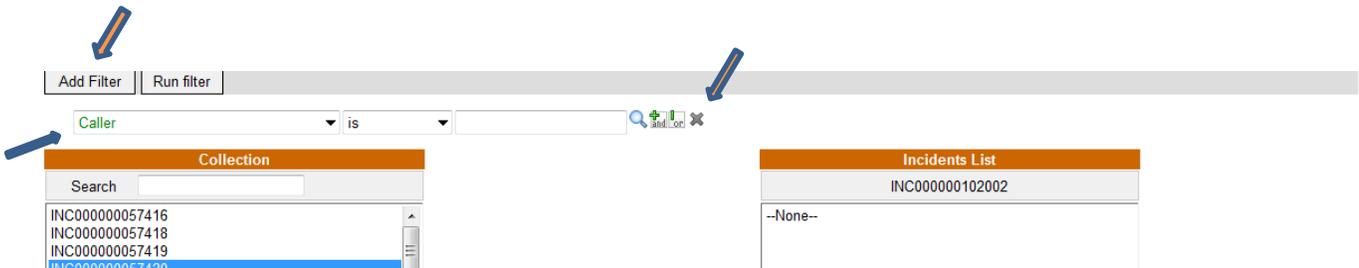
1. Navigate to the incident related lists and select the *incidents* tab.



2. Click the *edit* button. Note – clicking the *new* button will take you to a new incident record.
3. If you know the incident number to relate, select the record from the collection and click *add*.



4. Click the *save* button.
5. IF you do not know the incident number, you can perform a search.



Note – You can search on many incident fields and create multiple search layers.

6. Locate the desired incident record, highlight it and click *add*.
7. Click the *save* button.

Collaboration through email

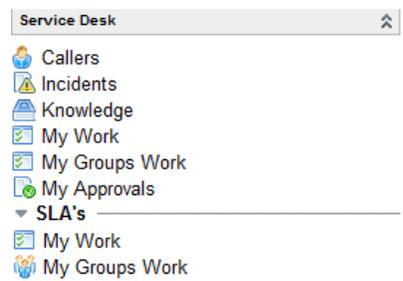
Email notifications have been configured to be sent at different stages of the incident lifecycle. Notifications have also been configured to send when a ticket has been commented.

If you reply to a system generated email, the information will be added to the activity log of the ticket. This allows a ticket to be commented without signing in to Service-Now.

Working Incidents

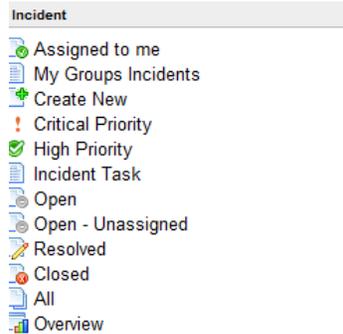
As a service provider, there are different options to see the work assigned to you. The entry points are all located on the left column of the screen.

Service Desk Module – From this entry point, the following views are available.



- Callers: Shows a list of caller records. Callers are people that can have a ticket opened under their name.
- Incidents: Shows a list of all active incidents.
- Knowledge: Entry point to the knowledge base.
- My Work: Shows all active tasks (incident, change, request, problem tickets) assigned to you.
- My Groups Work: Shows all active tasks (incident, change, request, and problem tickets) assigned to the support group(s) which you belong to.
- My Approvals: Shows a list of approvals that have been assigned to you and the states they are in. The list also shows the task that the approval is associated with.
- SLAs – My work: Shows the recommended work order, based on SLAs, for the tickets assigned to you. The list is designed to be worked from the top down.
- SLAs – My Groups Work: Shows the recommended work order, based on SLAs, for the tickets assigned to your group. The list is designed to be worked from the top down.

Incident Module - From this entry point, the following views are available.



- Assigned to me: Shows all active incidents assigned to you.
- My Groups Incidents: Shows all active incidents assigned to your group.
- Create New: Entry point to create a new incident record.
- Critical Priority: Shows all active incident tickets with the priority of Critical.
- High Priority: Shows all active incident tickets with the priority of High.
- Incident Tasks: Shows all active tasks associated with an Incident. This is for future use.
- Open: Shows all active tickets.
- Open – Unassigned: Shows all active incident tickets that are not assigned to an individual.
- Resolved – Shows all incident tickets in resolved status.
- Closed – Shows all incident tickets in closed status.
- All – Shows all incident tickets regardless of status.
- Overview – Incident dashboard showing various reports.

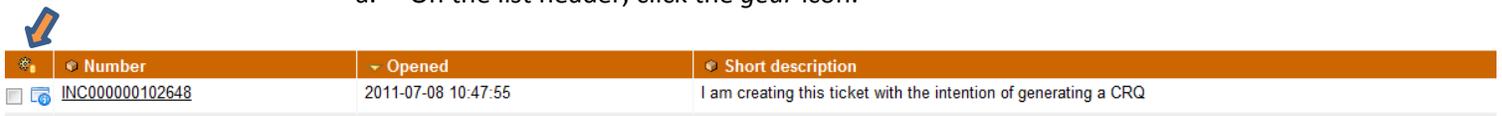
Assigning tickets within your team.

Most Service Provider groups have an individual assign out tickets to individual group members.

1. Under the Incident module, select *My groups* incidents.

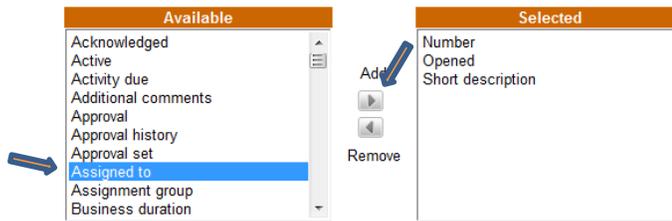
Note – if the *assigned to* field is not visible on your list, you will need to add it. This only has to be done one time. To add the field:

- a. On the list header, click the *gear* icon.

A screenshot of a table with an orange header. The header has three columns: "Number", "Opened", and "Short description". A gear icon is located in the top-left corner of the header, and a blue arrow points to it from the left. Below the header, the first row of data is visible, showing the ticket number "INC000000102648", the date "2011-07-08 10:47:55", and the description "I am creating this ticket with the intention of generating a CRQ".

	Number	Opened	Short description
<input type="checkbox"/>	INC000000102648	2011-07-08 10:47:55	I am creating this ticket with the intention of generating a CRQ

- b. Highlight *Assigned to* and add it to the 'selected' field.



You should now see the *assigned to* field on your list.

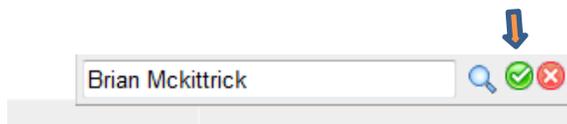
- c. To assign a ticket to an individual, double click in the assigned to column for the desired incident and select the *magnifying glass* icon.

Number	Opened	Short description	Assigned to
INC000000102648	2011-07-08 10:47:55	I am creating this ticket with the intention of generating a CRQ	Brian Mckittrick
INC000000102584	2011-06-27 20:54:38	dont have any rules	Thomas Bozonelos
INC000000102582	2011-06-27 20:47:57	testing this email would be cool	

- d. Select the individual that you wish to assign the ticket to.

Name	First name	Last name	Email
Allen Forni	Allen	Forni	forni@fmal.gov
Brian Mckittrick	Brian	Mckittrick	brianmck@fmal.gov
Cecelia Bruce	Cecelia	Bruce	cbruce@fmal.gov
Charles Hoffman	Charles	Hoffman	chuckh@fmal.gov

- e. Click the green checkmark icon to save your action.



Create a Change or Request ticket from an Incident.

From an existing incident ticket, it is possible to generate a different type of ticket if the work is better represented within a different Service Management process.

Information will be carried over from the incident to the new record type.

1. Right-click on the Incident header and select the appropriate action (Create change OR Create Request).



2. Resolve the incident ticket after moving the ticket to the appropriate work type.

Incident Create New - Field Definitions

Mandatory fields are in red.

Number: Incident ticket number. The number is system generated.

Caller: Customer requesting help. First name, last name or the employee ID can be entered in this field.

Employee Number: This field is system populated based on the caller field.

Unlisted Caller: This is a system field.

Reported Source: This field describes how the incident was reported.

Operational Category: This field identifies, at a customer level, what is to be performed.

Category/Type/Item: These fields combine to identify the technology component requiring attention.

Match CI to Caller: When checked, Configuration Items (CI) owned by the caller will be return when performing a CI search.

Configuration Item: A searchable filed that allows the attachment of an affected CI to an Incident ticket.

Assignment group: Service Provider group assigned to the ticket.

Assigned to: An individual who is a member of an Assignment group.

Incident State: Lifecycle status of the incident ticket.

Impact: The degree to which a system/service is degraded.

Urgency: The measurement that describes how quickly an incident needs to be resolved.

Priority: Impact and Urgency combine to designate a calculated priority used to prioritize the incident.

Opened: Date/Time stamp of when the ticket was created. This is system generated.

Related Change: Searchable field that allows the attachment of a Change Request.

Related Problem: Searchable field that allows the attachment of a Problem Record.

Submit as Knowledge: When checked, the information contained in the ticket is submitted for review as a Knowledge Article.

Last Update: Date/Time stamp of the last saved ticket activity.

Last Updated by: Individual who performed the last saved ticket activity.

Watch List: Provides functionality that allows interested individuals to receive email updates regarding ticket updates and status changes.

Short Description: Brief synopsis describing the nature of the incident.

Summary: All information that has been gathered pertaining to the incident.

Additional Comments: All work/follow up performed to achieve incident resolution.

Activity: Time stamped history of all updates/actions performed to the incident record.

Resolved (legacy): System field used for legacy reporting.

Time to resolve in hours (legacy): System field used for legacy reporting.

Closed (legacy): System field used for legacy reporting.

These fields display when a ticket is moved to a resolved state:

Resolution Code: Describes the method in which a resolution was applied.

Resolution Notes: Describes what was done to resolve the incident.

These fields are used by the Service Desk and through event monitoring:

External Support Center: Identifies the external vendor providing support OR identifies a ticket reported by an external source.

External Ticket Number: 3rd party ticket related to the Fermlab incident.

External Status: State of the related vendor ticket.

External Vendor Reported Time: The time the incident was report to or report by a 3rd party.