

Fermilab Service Provider Training



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Training Curriculum



- **End User Training:** How navigate the updated service desk, submit requests for service, and report outages.
- **Incident management:** Break/Fix activity. How to manage and resolve tickets that reflect an outage or a degradation of service.
- **Request management:** How to navigate the service catalog, manage and fulfill tickets that reflect a request for service.
- **Change management:** How to record and plan changes to production.
- **Configuration and Event management:** How query and view CIs, designate CIs as “pageable”, build and assign on-call rotation schedules, and update categorization of CIs within the CMDB.
- **Reporting:** How to access reports and queries, and build reports for specific requirements.

Today's Agenda



What's being covered in this training

- **Navigating the tool**
 - My Self Service
 - My Work, My Group's Work
 - Ticket Initiation and Notifications
- **How to “work a ticket” in Incident management**
 - Assign Ticket
 - Update Ticket Status
 - Resolving a Ticket
- **How to relate Tickets and CIs (related Lists)**
 - How to relate a CI to an Incident
 - How to relate to relate other tickets (Change, Problem, Requests, etc.)
 - How to relate tasks
 - How to CREATE tickets from an Incident (Change, Problem, Requests, etc.)
- **How to manage email collaboration & watch lists**
 - Watch List
 - Email Collaboration and Updates
 - Notifications

What's not being covered

- Request management (this will be covered for each specific support group)
- Event management, on-call Rota & paging
- Reporting
- Data migration & go-live coordination

A Note About Requests



An **Incident** is a record and response to restore or fix something.

A **Request** is a record and response to provide a service or item, such as a laptop, a computer account, or information.

Requests have different identifiers than Incidents (REQ vs. INC).

Requests are ordered through the Service Catalog.

There will be shorter training sessions specific to Service Groups on Request Management.

Navigating the Tool



Welcome: Marcia Teckenbrock Update Set: Default [Logout](#) [Knowledge Home](#) | [Create Incident](#) | [Print](#)

Type filter text [Advanced search](#)

Self-Service

- Homepage
- Service Catalog
- Knowledge**
- Help the Service Desk

Incidents

- My Requests
- Requested Items

My Profile

- Take Survey

Service Desk

Incident

Problem

Change

CAB Review

- Create New
- Open
- Closed
- All
- Overview
- Change Window
- Maintenance Schedules
- Change Schedule

Administration

Knowledge Base

General

Supported Browsers and Devices	2011-02-24
Adjusting number of tickets in visible on page	2011-02-18
Filtering the view of the activities in the activity section	2011-02-18
Submitting an enhancement request	2011-02-15
Creating New Knowledge Article (KA)	2011-02-15
Creating a Change	2011-02-15
Who needs to use the VPN?	2009-04-30

[View all items](#)

Email

Austin Test article	2011-08-10
Permissions for Calendar, Email and Tasks	2009-05-23
Manage Your Quota in eMarq	2009-05-23
Outlook 2003 settings	2009-05-22
Home Access	2009-04-30

[View all items](#)

Known Error

No items

Applications

How to manage Incident tickets	2011-07-08
How to manage Problem tickets in Service-Now	2011-07-01
Migrating event monitoring applications from Remedy to Service-Now using your own code	2011-06-07
Migrating event monitoring applications from Remedy to Service-Now using project supplied libraries	2011-06-06
Application use from Home with VPN	2009-05-22

[View all items](#)

News

This is a test - We are currently investigating issues posting an outage.	2011-06-06
PRB0000004 Boot with shift key held down	2011-04-08
Confirm crucial Windows 7 security settings are enabled	2011-01-10

[View all items](#)

My Profile

Take Survey

Service Desk

Incident

Problem

Change

CAB Review

Self-Service Portal

Self-Service

- Homepage
- Service Catalog
- Knowledge
- Help the Service Desk

- Incidents
- My Requests
- Requested Items

- My Profile
- Take Survey

Service Desk

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

SLA's

- My Work
- My Groups Work

Incident

- Assigned to me
- My Groups Incidents
- Create New
- Critical Priority
- High Priority
- Incident Task
- Open
- Open - Unassigned
- Resolved
- Closed
- All
- Overview

Self-Service

- Homepage
- Service Catalog
- Knowledge
- Help the Service Desk

- Incidents
- My Requests
- Requested Items

- My Profile
- Take Survey

Self-Service Portal, cont'd



We'll provide a standard home page that will look something like this.

[Add content »](#)

My ITIL Homepage

Refresh: 5 minutes

Switch to page...

Sticky Note

-Resolve all tickets opened by Tom Ackenhusen. Even if they arent fixed.
-Go on vacation.

Legacy MTTR



ITIL Summary Counts

Critical Items

Open Items that have Critical priority

27

Overdue Items

Open items that have attained an overdue escalation value

0

Items Opened > 1 Week

Items that have stayed open for longer than a week

5924

News

Confirm crucial windows / security settings are enabled

2011-01-10

[View all items](#)

Assigned to me

	Number	Category	Short description
<input type="checkbox"/>	INC000000102335	Applications/Software	dfsad

Self-Service Portal, cont'd



You can also customize a version for your needs. This will become your default view. It is easy to switch back and forth between the standard and customized views.

A screenshot of a web portal header. It features a dark orange navigation bar at the top right with a 'Logout' button, a home icon, and a printer icon. Below the navigation bar, the text 'ITIL Homepage' is displayed on the left. In the center, there is a 'Refresh' link followed by a dropdown menu currently set to 'Off'. On the right, there is another dropdown menu labeled 'Switch to page...'.

ITIL Homepage [Refresh](#): Off ▼ Switch to page... ▼

Customizing Your Portal

The screenshot displays a service portal administration interface. The top navigation bar includes a user welcome message, an "Add content" link (circled in red), and an "Admin" section with a "Refresh" button. The left sidebar contains a "Self-Service" menu with categories like "Homepage", "Incidents", "My Profile", "Service Desk", and "Incident". The main content area features a "Users by Location" chart and a "Configuration Item by Manufacture" bar chart. A central "Add content" dialog box (circled in red) lists various content types such as "Gadgets", "Knowledge Base", "Labels", "Performance Graph Controls", "Service Catalog", "System Applications", "World Clocks", "Gauges", and "Content Blocks". The "Emergency Changes" section within this dialog is highlighted, showing two active change requests: "CRQ000000000123 Upgrade" and "CRQ000000000094 Remove changes to out-of-the-box PL/SQL tool kit". Below the dialog, a table of configuration items is visible, with several "Add here" buttons (circled in red) indicating where new content can be added. The bottom right corner shows a list of system components including "Validation Scripts", "Syntax Editor Macros", "System Upgrades", "Scheduled Jobs", and "Deleted Records".

Customizing Your Portal, cont'd

YOUR Sticky Notes Module

YOUR Pending Approvals

Sticky Note

Resolve all tickets opened by Tom Ackenhusen. Even if they aren't fixed.
-Plan a vacation...immediately.

My Groups VWork

Number	Short description	Opened by	Assigned to
RITM0010371	General Request	Brian Mocktrick	
RITM0010370	Additional Kerberos Items	Heather Kumin	
RITM0010369	Additional Kerberos Items	Heather Kumin	
RITM0010368	Additional Kerberos Items	Heather Kumin	
RITM0010367	Additional Kerberos Items	Heather Kumin	
RITM0010366	Additional Kerberos Items	Heather Kumin	
RITM0010364	Additional Kerberos Items	Heather Kumin	
RITM0010363	Additional Kerberos Items	Heather Kumin	
RITM0010360	Additional Kerberos Items	Heather Kumin	
RITM0010357	Hardware Service Request	Krista Jacobs	Jack Schmidt
RITM0010356	asof asof	Jeff Pierce	
RITM0010355	short	Jeff Pierce	
RITM0010354	short	Jeff Pierce	
RITM0010353	short	Jeff Pierce	
RITM0010352	Request New Office Space	Jeff Pierce	
RITM0010351	Proprietary Property Request	Jeff Pierce	
RITM0010350		Jeff Pierce	
RITM0010349	Additional Kerberos Items	Heather Kumin	
RITM0010348	Cryptocard Request	Heather Kumin	
RITM0010347	Additional Kerberos Items	Heather Kumin	

My Pending Approvals

Stats	Approver	Comments	Approval for	Created
Requested	Thomas Bozonelos		CRQ000000000112	2011-02-10 16:40:10
Requested	Thomas Bozonelos		CRQ000000000303	2011-02-10 16:40:31
Requested	Thomas Bozonelos		CRQ000000000110	2011-02-10 16:40:57
Requested	Thomas Bozonelos		CRQ000000000079	2011-02-10 16:41:00
Requested	Thomas Bozonelos		CRQ000000000742	2011-02-10 16:41:21
Requested	Thomas Bozonelos		CHG0030093	2011-02-11 09:37:05
Requested	Thomas Bozonelos		CHG0030099	2011-02-17 10:15:10

YOUR open Incidents,* Requests, Changes, Problems
* Incidents are still "active" until they are in closed status (after ~24 hours)

My work

Number	Short description	Opened by	Assigned to
INC000000102704	aofasof	austin buono	Thomas Bozonelos
INC000000102694	oafasof	austin buono	Thomas Bozonelos
INC000000102689	oafasof asof asof	austin buono	Thomas Bozonelos
INC000000102686	test	Tyrone Killebrew	Thomas Bozonelos
INC000000102681	tesgasofa so fa sof a sof	austin buono	Thomas Bozonelos
INC000000102677	Outage on application beginning at 2011-07-21 16:28:56	Alicia Simmons	Thomas Bozonelos
INC000000102676	Unable to access Leave Usage	Alicia Simmons	Thomas Bozonelos
INC000000102674	I would like to request SharePoint Permissions to xyz site	Alicia Simmons	Thomas Bozonelos
INC000000102674	Request for MM Proxy to CD 117	Alicia Simmons	Thomas Bozonelos
INC000000102684	dont have any rules	austin buono	Thomas Bozonelos
INC000000101876	a	Brian Mocktrick	Thomas Bozonelos
INC000000101852	Can't print	Thomas Bozonelos	Thomas Bozonelos
INC000000101847	Need a monitor	Brian Mocktrick	Thomas Bozonelos
INC000000064731	Hardware Loan Request Jack Schmidt	Jason Ornes	Thomas Bozonelos
INC000000063146	Hardware Loan Request Laurie Pederson	Laurie Pederson	Thomas Bozonelos
CHG0030099	This is an example of a short description for a Major Change	Michael Kaiser	Thomas Bozonelos

Working an Incident Ticket



You will receive a notification when an Incident is assigned to your group (or directly to you).

Incident INC000000102503 has been assigned to you

owner-sn-poc@listserv.fnal.gov on behalf of Service-Now Service Desk

Sent: Wed 8/17/2011 7:31 AM

To: sn-poc@fnal.gov

Short Description: Testing the email collaboration

Click here to view incident: [LINK](#)

Severity: 3 - Low

Priority: 3 - Medium

Category: General

Comments:

Ref:MSG0052951

Click the link to view Incident ticket.

Working an Incident Ticket, cont'd



Service Desk view
after
login



Service Desk module



Incident module



The screenshot shows a user interface for a Service Desk. At the top, there is a header with the user's name, "Welcome: Marcia Teckenbrock". Below the header is a search bar labeled "Type filter text" and a link "Add content". The main content area is divided into three sections:

- Self-Service:** Contains links for Homepage, Service Catalog, Knowledge, and Help the Service Desk.
- Service Desk:** Contains links for Callers, Incidents, Knowledge, My Work, My Groups Work, My Approvals, SLA's, My Work, and My Groups Work.
- Incident:** Contains links for Assigned to me, My Groups Incidents, Create New, Critical Priority, High Priority, Incident Task, Open, Open - Unassigned, Resolved, and Closed.

On the right side of the interface, there are two charts:

- Users by Location:** A pie chart showing a single blue slice, with a legend below it indicating "(empty)".
- Configuration Item by Manufacturer:** A 3D bar chart showing the number of configuration items for various manufacturers. The x-axis ranges from 0 to 20. The y-axis lists manufacturers: FERMILAB, LECROY RESEAR..., DELL COMPUTERS, KOI COMPUTERS, DIGIT..., NANOMETR..., SEACA..., and COMPUT... The bars are colored in a rainbow spectrum.

Working an Incident Ticket, cont'd



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

Callers: Shows list of caller records. Callers are people that can have a ticket opened under their name (= Remedy Requestors).

Incidents: All active incidents.

Knowledge: Entry point to the knowledge base.

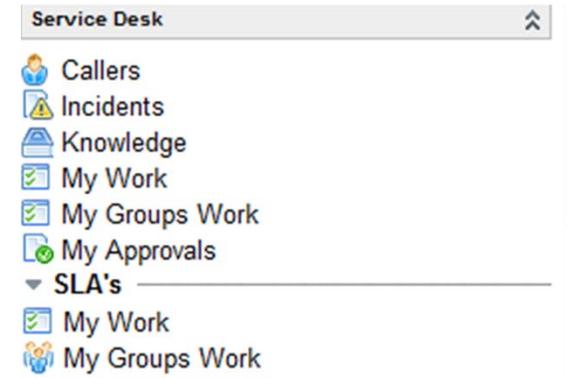
My Work: All incidents, changes, requests and problems assigned to you.

My Groups Work: All active incidents, changes, requests and problems assigned to your support group(s).

My Approvals: Approvals that have been assigned to you, the states they are in and task each approval is associated with.

SLAs – My Work: Recommended work order (based on SLAs) for your tickets; designed to be worked from top down.

SLAs – My Groups Work: Recommended work order (based on SLAs) for the tickets assigned to your group; designed to be worked from the top down.



Viewing an Incident

Click on an Incident link to open it.

Welcome: Marcia Teckenbrock Update Set: Default

Type filter text A A ↺ ☐

Incidents **New** Go to Number 🔍

▶ All > Active = true

	Number	Assigned to	Opened	Short description
<input type="checkbox"/>	INC000000057462		2010-10-18 09:36:00	Item not available in Remedy for CI
<input type="checkbox"/>	INC000000057480	Patrick Gartung	2010-10-18 10:19:00	User is trying to log into cmslpc cluster and gets err
<input type="checkbox"/>	INC000000057508		2010-10-18 11:55:00	Item not available in Remedy for CI
<input type="checkbox"/>	INC000000058221	Nino Strothman	2010-10-22 10:35:00	Transfer license from one computer to another
<input type="checkbox"/>	INC000000058800	Jeffrey Meisner	2010-10-27 13:43:00	battery for Thinkpad laptop
<input type="checkbox"/>	INC000000058886		2010-10-28 09:56:00	Hardware Service Request :jpsi1111/1112
<input type="checkbox"/>	INC000000059019	John Diamond	2010-10-29 08:37:00	User uhas problems connecting via Humming Bird
<input type="checkbox"/>	INC000000059020	Michael Kriss	2010-10-29 08:42:00	Unable to run Java update
<input type="checkbox"/>	INC000000059276	Keith Coiley	2010-11-02 08:25:00	Reorganizing the WH9W office now the student has
<input type="checkbox"/>	INC000000059653	Tyrone Killebrew	2010-11-04 11:22:00	Hardware Service Request
<input type="checkbox"/>	INC000000059705		2010-11-04 14:31:00	Hardware Service Request :DOCS926
<input type="checkbox"/>	INC000000059771	Tyrone Killebrew	2010-11-05 10:36:00	Hardware Service Request
<input type="checkbox"/>	INC000000060009	Charles Andrews	2010-11-08 14:48:00	INC000000057969 - Confirmation New Incident recei

Incident

- Assigned to me
- My Groups Incidents
- Create New
- Critical Priority
- High Priority
- Incident Task
- Open
- Open - Unassigned
- Resolved

Moving an Incident into Work in Progress



It is a requirement that Incidents are in “Work in Progress” before moving into a “Resolved” state in order to calculate the Mean Time to respond (MTTr).

1. Change Incident State to “Work in Progress.”
2. Click **Save** or **Save & Exit**.

← Incident | = Required field Save & Exit Save

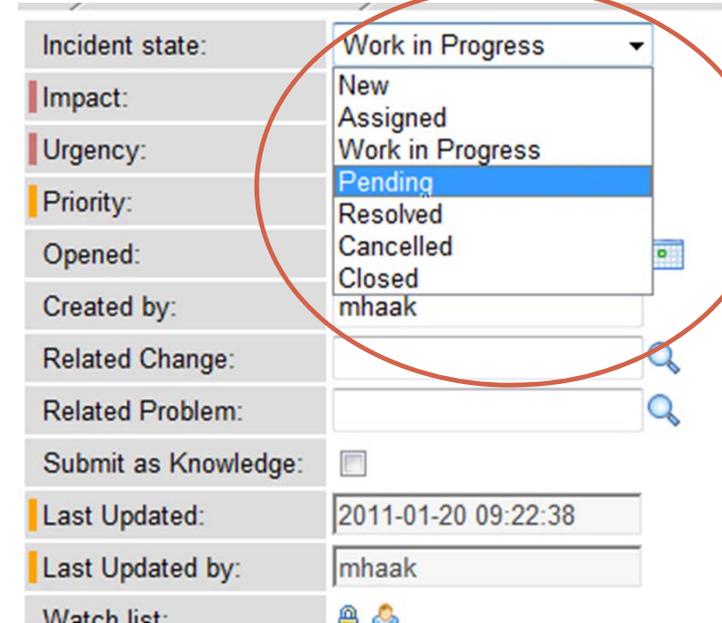
New **Assigned** Work In Progress Pending Resolved

Number:	INC000000102755	Incident state:	Assigned
Caller:	Marcia Teckenbrock	Impact:	New
Employee number:	10450N	Urgency:	Work in Progress
Unlisted caller:		Priority:	Pending
Reported Source:	Phone	Opened:	Resolved
Operational Category:	Add/New	Created by:	Cancelled
			Closed
			marcia

Moving an Incident into Pending state



1. Change Incident State to “Pending.”
2. Update ‘Additional comments’ with pending reason.
3. Click **Save** or **Save & Exit**.

A screenshot of a software interface showing a dropdown menu for 'Incident state'. The menu is open, displaying several options: 'Work in Progress', 'New', 'Assigned', 'Work in Progress', 'Pending', 'Resolved', 'Cancelled', and 'Closed'. The 'Pending' option is highlighted in blue. A red circle is drawn around the dropdown menu. Below the dropdown, the 'Created by' field shows 'mhaak'. Other fields include 'Impact:', 'Urgency:', 'Priority:', 'Opened:', 'Related Change:', 'Related Problem:', 'Submit as Knowledge:', 'Last Updated:', and 'Last Updated by:'.

Incident state:	Work in Progress
Impact:	
Urgency:	
Priority:	
Opened:	
Created by:	mhaak
Related Change:	
Related Problem:	
Submit as Knowledge:	<input type="checkbox"/>
Last Updated:	2011-01-20 09:22:38
Last Updated by:	mhaak
Watch list:	

Moving an Incident into Resolved state

1. Change Incident State to “Resolved.”

Incident = Required field Save & Exit Save

Cancelled any active on-call rotation escalations for INC000000102755

New > Assigned > Work In Progress > **Pending** > Resolved >

Number:	INC000000102755	Incident state:	Resolved
Caller:	Marcia Teckenbrock	Impact:	New
Employee number:	10450N	Urgency:	Assigned
Unlisted caller:		Priority:	Work in Progress
Reported Source:	Phone	Opened:	Pending
Operational Category:	Add/New	Created by:	Resolved
Category:	Applications/Software	Related Change:	Cancelled
			Closed
			marcia

Moving an Incident into Resolved state, cont'd



2. Complete **Resolution Code** and **Resolution Notes** fields.

Incident | = Required field

Assignment group: Windows Desktop Support

Assigned to: David Schuman

Short description: Please install Visio

Summary:

Additional comments:

Resolution Code: Solved (Permanently)

Resolution Notes:

License valid; software working.

3. Click **Save** or **Save & Exit**.

Moving an Incident into a 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.

Incident tickets are considered “active” and will show up in lists and searches until they are closed.

Moving an Incident into a Canceled state



1. Change Incident State to “Cancelled.”

← Incident = Required field Save & Exit Save

New > Assigned > Work In Progress > **Pending** > Resolved >

Number:	INC000000102755	Incident state:	Work in Progress
Caller:	Marcia Teckenbrock	Impact:	New
Employee number:	10450N	Urgency:	Assigned
Unlisted caller:		Priority:	Work in Progress
Reported Source:	Phone	Opened:	Pending
Operational Category:	Add/New	Created by:	Resolved
			Cancelled
			Closed
			marcia

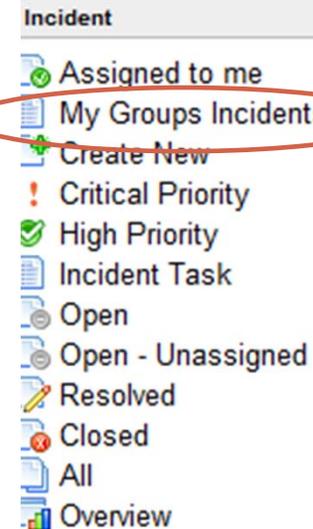
2. Click **Save** or **Save & Exit**.

Assigning a Ticket within Your Team



1. In the Incident module, select **My Groups Incidents**.

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.)



Assigning a Ticket within Your Team, cont'd



2. To add the **Assigned to** field:

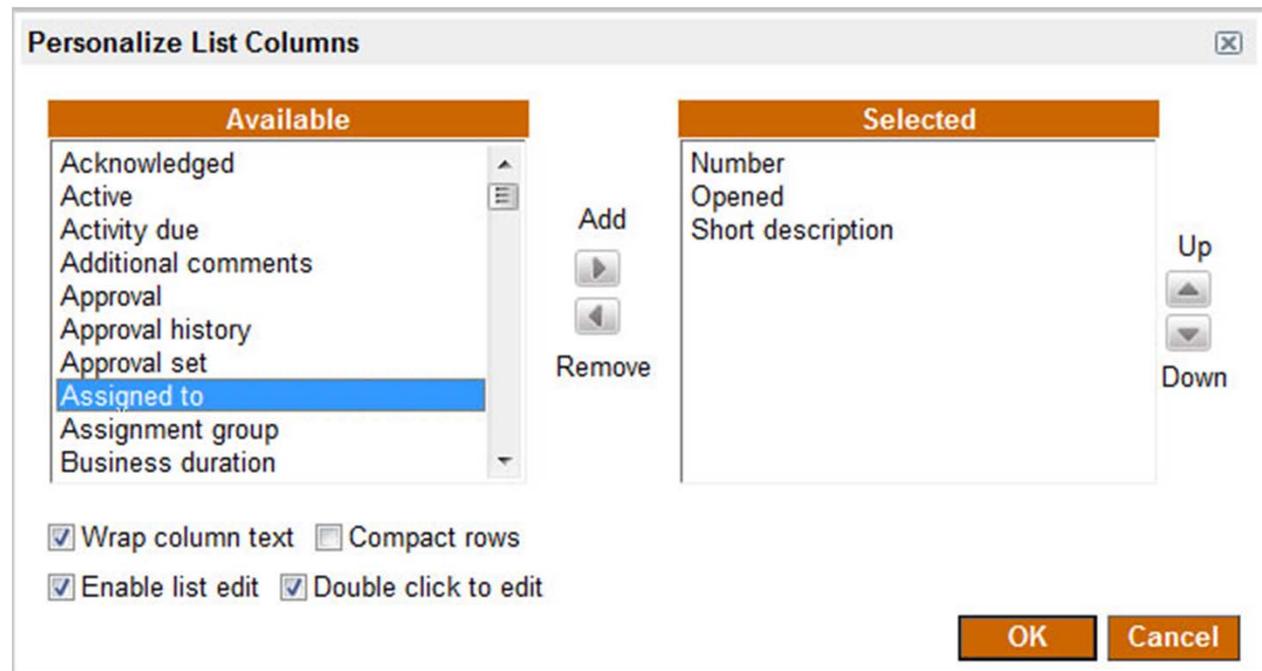
a. On the list header, click the *gear* icon.



 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.

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



Personalize List Columns

Available		Selected
Acknowledged	Add Remove	Number
Active		Opened
Activity due		Short description
Additional comments		
Approval		
Approval history		
Approval set		
Assigned to		
Assignment group		
Business duration		

Wrap column text Compact rows
 Enable list edit Double click to edit

Up Down

OK Cancel

Assigning a Ticket within Your Team, cont'd



To assign a ticket to an individual...

1. 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	

2. Select the individual that you wish to assign the ticket to.

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

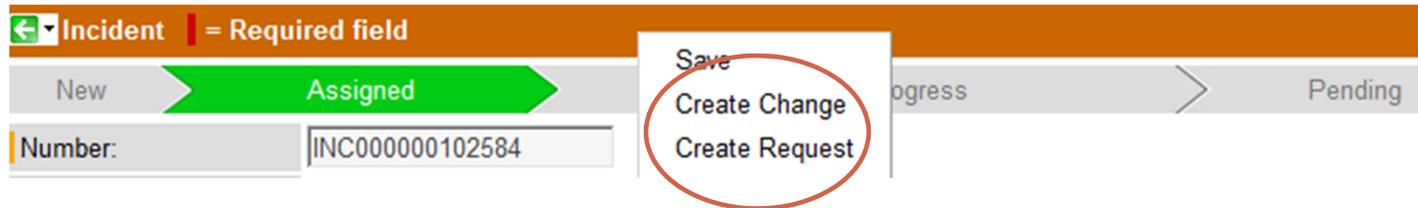
3. Click the green checkmark icon.

Brian Mckittrick   

Creating a Change or Request from an Incident



- If the work is better represented by a different Service Management process than an incident, you can generate a different type of ticket.
 - 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.

Attaching a CI to an existing Incident

To match a Configuration Item (CI) to a caller.
(Note: Assumes there is a name entered in the **Caller** field.)

1. Click the magnifying glass next to the CI field. (You may have to disable the pop up blocker in your browser).

The screenshot shows the ServiceNow Incident form on the left and a pop-up window of Configuration Items on the right. The incident form has the following fields: Number (INC000000102756), Caller (Ramon Pasetes), Employee number (11673N), Unlisted caller, Reported Source (None), Operational Category (None), Category (None), Type (None), Item (None), Match CI to Caller (checked), Configuration item (with a magnifying glass icon circled in red), Assignment group, Assigned to, Short description, and Summary. The Configuration Items window shows a table with the following data:

Name	Manufacturer
ASSET_202911	CYCLADES CORP
ASSET_213498	INTERNATIONAL BUSINESS MACHINES
ASSET_231089	PALM INC

An arrow points from the magnifying glass icon in the incident form to the Configuration Items window. Another arrow points from the Configuration Items window to the text '2. Select the impacted CI.' A third arrow points from the Configuration Items window to the text '3. Click **Save** or **Save & Exit**.'

2. Select the impacted CI.

3. Click **Save** or **Save & Exit**.

More on CI's

To return a full list of CIs:

1. Uncheck the 'Match CI to Caller' field.

2. Enter the manufacturer or item name in the **Configuration Item** field or

click the magnifying glass next to the field, search for and select the impacted CI.

3. Click **Save** or **Save & Exit**.

← Incident = Required field

New Assigned Work In Progress

Number: INC000000102756

Caller: Ramon Pasetes

Employee number: 11673N

Unlisted caller:

Reported Source: Email

Operational Category: Break/Fix

Category: Hardware

Type: Peripheral

Item: -- None --

Match CI to Caller:

Configuration item: DELL

Assignment group: Showing 1 through 15 of 207

Assigned to: Dell 968 AIO Printer Software

Short description: Dell AIO Printer 948

Summary: REC

Dell Backup and Recovery Manager

Dell Backup and Recovery Manager

Dell Bluetooth Software

Dell Button Service

Dell CinePlayer

Dell Client Configuration Toolkit

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.



Incident by Same Caller: All tickets opened by caller.

Incidents: All tickets related to this incident record. (Steps on attaching a related incident in next section.)

Incident Tasks: For future use. Will show tasks related to incident record.

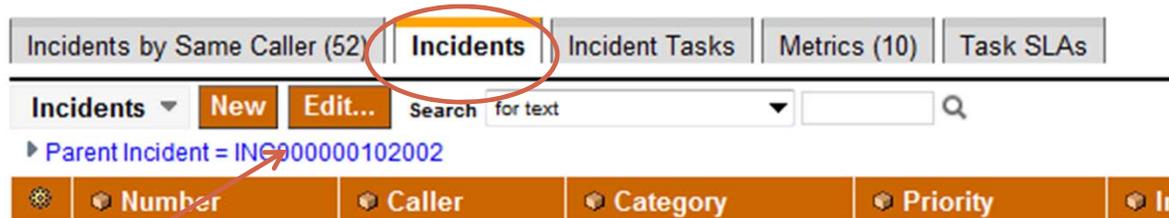
Metrics: Metrics calculated by system, including: Create to resolve duration; Assigned to duration; Incident state duration; First Call resolution; and assignment group duration.

Tasks SLA: Associated incident SLAs – Mean Time to respond (MTTr) and Mean Time to Resolve (MTTR).

Attaching Related Incidents



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



2. Click the **Edit** button. (Note, clicking **New** will create new incident record.)

Attaching Related Incidents, cont'd

3. If you know the related incident number, select the record from the collection and click **Add**. The selected incident/s will show in the right pane.

The screenshot displays a software interface with two main panes. The left pane, titled "Collection", features a search bar at the top and a list of incident numbers below. The number "INC000000057461" is highlighted in blue. To the right of this list are "Add" and "Remove" buttons, with the "Add" button circled in red. The right pane, titled "Incidents List", shows a list of incident numbers, with "INC000000102755" at the top and "INC000000057424" highlighted in blue. A red arrow points from the "Add" button in the left pane to the "INC000000057424" entry in the right pane. At the bottom of the interface, there are "Save" and "Cancel" buttons, with the "Save" button circled in red.

4. Click the **Save** button.

5. If you do not know the incident number, you can perform a search.

Attaching Related Incidents, cont'd

You can search on many incident fields and create multiple search layers:

Add Filter | Run filter

Caller is [] and/or []

6. Locate the desired incident record, highlight it and click **Add**. The incident will show in the right pane.

7. Click **Save**.

The screenshot shows two side-by-side panes. The left pane, titled 'Collection', contains a search bar and a list of incident IDs. The right pane, titled 'Incidents List', shows a single incident ID. Below the panes are 'Add' and 'Remove' buttons, and at the bottom are 'Save' and 'Cancel' buttons. Red arrows indicate the workflow: one arrow points from the 'Add Filter' button to the search field, and another points from the highlighted incident in the 'Collection' pane to the 'Add' button. A red circle highlights the 'Save' button.

Collection	Incidents List
Search []	INC000000102755
INC000000057416	INC000000057424
INC000000057418	
INC000000057419	
INC000000057420	
INC000000057423	
INC000000057436	
INC000000057437	
INC000000057441	
INC000000057445	
INC000000057450	
INC000000057461	
INC000000057462	
INC000000057464	
INC000000057468	
INC000000057469	
INC000000057470	
INC000000057472	
INC000000057473	

Add
Remove

Save Cancel

Attaching a CRQ or Problem to an Incident



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:		

Attaching a CRQ or Problem to an Incident, cont'd



2. Search for and select the related Change or Problem ticket.
 - by Request, Number, Text or Short description

Change Requests **New** Go to Number 1 to 100 of 988 | 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 |

3. Select the related record.

4. Click **Save** or **Save & Exit**.

Collaborating



Via Email

- Email notifications will be sent to Assignee...
 - When ticket is assigned.
 - When a ticket has been commented on.
- If you reply to a system-generated email, the information will be added to the “Additional Comments.”

Collaborating, cont'd



- For interested individuals to get updates on the progress of an incident.
- The following notifications are sent to individuals on the watch list:
 - o Incident Opened
 - o Incident Commented
 - o Incident Resolved

Adding yourself to the watch list for an Incident

The screenshot shows a web-based incident management system. At the top, there is a navigation bar with a back arrow, the text "Incident", a red bar indicating "= Required field", and a "Save & Exit" button. Below the navigation bar is a progress bar with stages: "New" (highlighted in green), "Assigned", "Work In Progress", "Pending", and "Resolved". The main form is divided into two columns. The left column contains fields for: Number (INC000000102756), Caller (Ramon Pasetes), Employee number (11673N), Unlisted caller, Reported Source (Email), Operational Category (Break/Fix), Category (Hardware), Type (Peripheral), Item (-- None --), Match CI to Caller (checkbox), Configuration item (DELL), Assignment group, and Assigned to. The right column contains fields for: Incident state (New), Impact (3 - Moderate/Limited), Urgency (3 - Medium), Priority (3 - Medium), Opened (2011-08-11 16:38:10), Created by, Related Change, Related Problem, Submit as Knowledge (checkbox), Last Updated, Last Updated by, and Watch list. The Watch list field is circled in red and contains a lock icon and a person icon. A red arrow points from the text "1. Select the person icon next to the Watch list field." to the person icon in the Watch list field. Another red arrow points from the text "2. Click Save or Save & Exit." to the "Save & Exit" button.

Number:	INC000000102756	Incident state:	New
Caller:	Ramon Pasetes	Impact:	3 - Moderate/Limited
Employee number:	11673N	Urgency:	3 - Medium
Unlisted caller:		Priority:	3 - Medium
Reported Source:	Email	Opened:	2011-08-11 16:38:10
Operational Category:	Break/Fix	Created by:	
Category:	Hardware	Related Change:	
Type:	Peripheral	Related Problem:	
Item:	-- None --	Submit as Knowledge:	<input type="checkbox"/>
Match CI to Caller:	<input type="checkbox"/>	Last Updated:	
Configuration item:	DELL	Last Updated by:	
Assignment group:		Watch list:	
Assigned to:			

1. Select the person icon next to the Watch list field.
2. Click **Save** or **Save & Exit**.

Collaborating, cont'd



Adding someone else to the watch list for an Incident

1. Select the lock icon next to the Watch list field.
2. Click the magnifying glass, search by name and select the appropriate person.
3. Once the record is selected, and the name appears in the watch list field, click the lock icon.
4. You can also enter an address in the email field....

Last Updated:

Last Updated by:

Watch list:  

Watch list:

Brian Mckittrick

Enter email address

Collaborating, cont'd

4. Enter an address in the email field and click the email icon to validate the address.

Once the email address is validated, it will be entered to the watch list.

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



Collaborating, cont'd



Removing someone from the watch list for an Incident

1. Click the lock icon next to the watch list field to expand the field.
2. Highlight the record to delete.
3. Click the X icon to delete the record.
4. Click the lock icon to close the watch list.

Last Updated:

Last Updated by:

Watch list:  

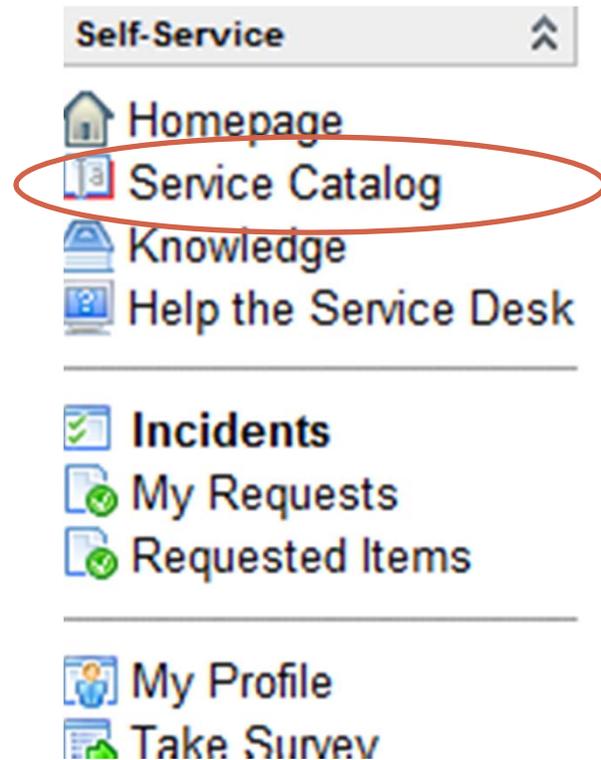
Watch list:

Brian Mckittrick brianmck@fnal.gov	
	
	
	

Creating an Incident Using Self-Service View



- Select “Service Catalog” from the Self-Service module.



Creating an Incident, cont'd



- Click “Report an issue/outage.”

Service Catalog

Computers and Hardware

- Hardware Service Request
- Proprietary Property Request
- Request a Windows Loaner Laptop
- Request New Hardware

Accounts

- Additional Kerberos Items

Something Broken

- MX Record Variance Request
- Report an issue/outage

Ask a Question

- Ask a Question
- Safety Concern Request

Creating an Incident, cont'd



- Fill in the required information.

Report an issue/outage

Please provide the information below to help us identify and resolve the issue you are experiencing.

Your Name Brian Mckittrick  	Fermi ID 15595N
Your Office Phone (630) 840-5208	Email brianmck@fnal.gov
Supervisor Name Jack Schmidt  	Supervisor ID 04081N
Supervisor Phone (630) 840-4060	Supervisor Email schmidt@fnal.gov
What service is down/unavailable? -- None --	
At what time did you notice the outage began? <input type="text"/> 	
How widespread is the outage? ▶ More information	

Documentation



- This talk in DocDB: #4415

<https://cd-docdb.fnal.gov:440/cgi-bin/ShowDocument?docid=4415>

(It will evolve.)

- Sessions on other training modules will be announced via email.