Fermilab Service Provider Training

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Service-Now 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

- What's new in Incident Management? (Please see updated doc db #4415 for details!)
  - Resolved Incidents are now filtered out of active lists.
  - Incidents will now aut0-close after 72 hours.
  - Incident Tasks
  - Virtual Organization
  - Enhanced Category Field
- Request Management
  - Entering Requests
  - Managing Requests
- Hands-On
  - Creating tickets
  - Managing tickets

m1

Slide 3

m1 Change Rota to on-call rotation
marcia, 8/18/2011

Incidents vs. 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.

Request Overview

Requests are entered at Self-Service > Service Catalog. All items generate two records: A request record (REQ) and a Requested Item record (RITM).

Typically, unless specifically designed to operate differently

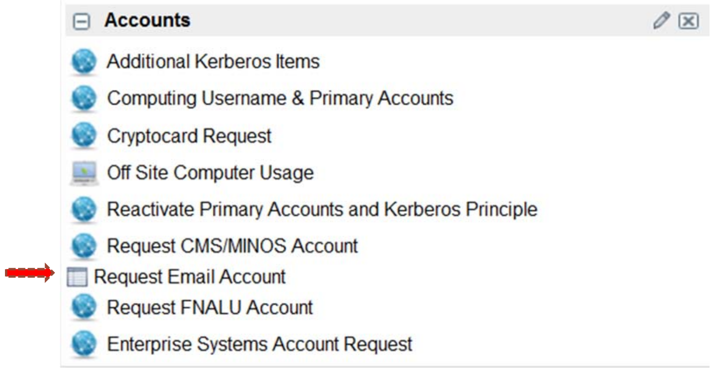
- Request records are assigned to the Service Desk
- Requested Item records are assigned to the group fulfilling the request.

This allows the Service Desk to oversee the request at a high level. All of the work to fulfill an item is performed on the Requested Item (RITM) record and the Request (REQ) record is generally used for tracking. Once the Requested item is marked as complete, the Request record will automatically move to complete.

Entering a Request

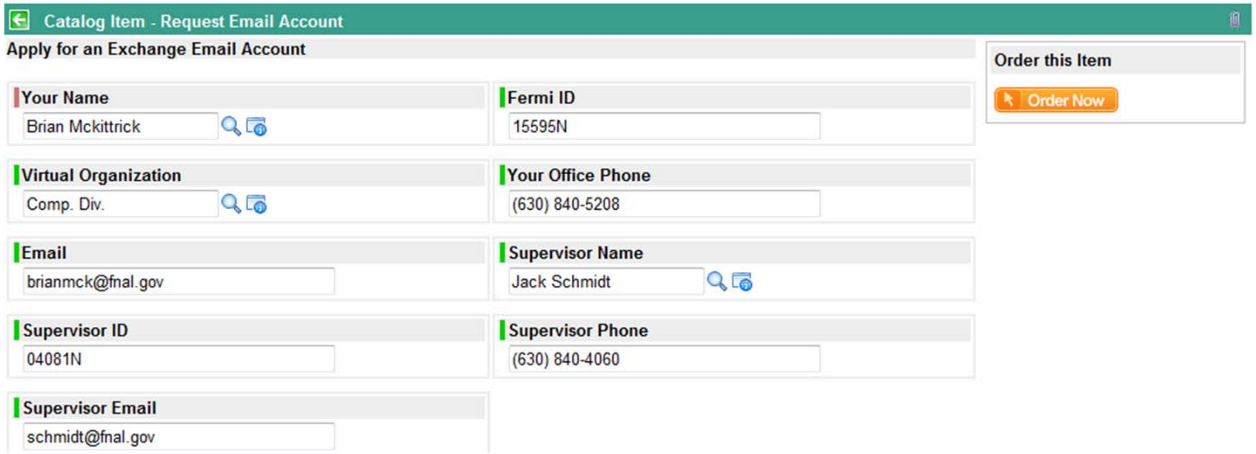
Navigate to the Service Catalog.

Select the Item that you want to request.



Entering a Request

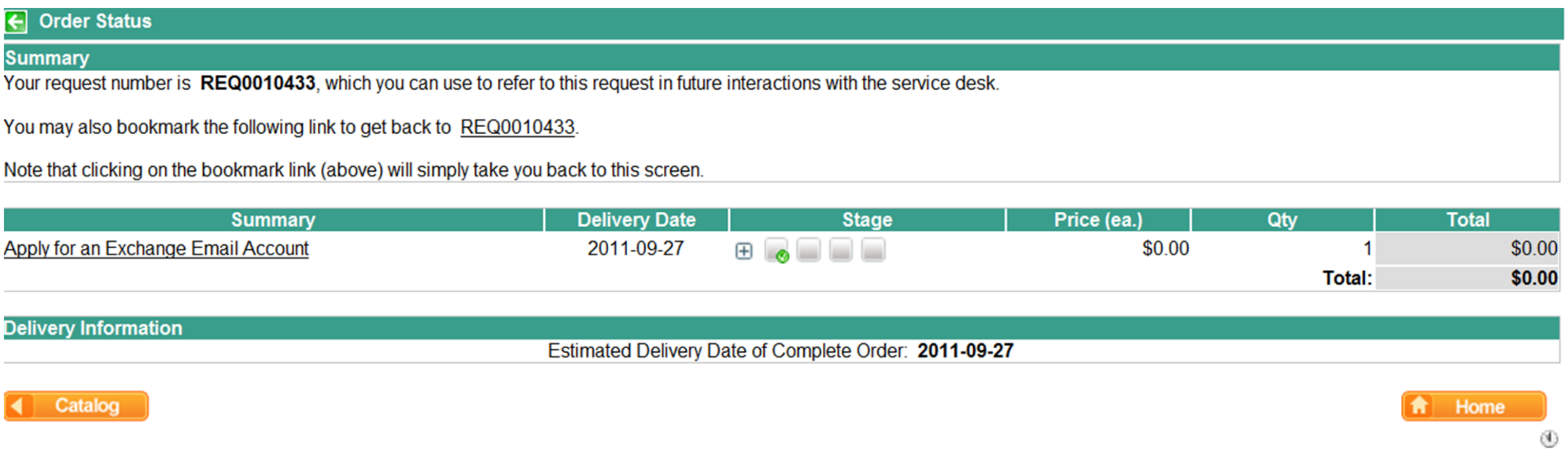
The request form will be pre-populated with basic information about you. Any fields with a red box are mandatory.



Entering a Request

Complete the form. To submit your ticket, select 'Order Now.'

After submitting your request, you will be taken to the Order Status screen, which contains basic information about your request.



Managing Requests and Requested Items

Request Tickets follow the following lifecycle:

Pending Approval ▶ Approved ▶ Closed

Requested Item Tickets follow the following lifecycle:

Waiting for Approval ▶ Fulfillment ▶ Delivery ▶ Closed Complete/Canceled

As previously noted, Service Providers will perform work on the Requested Item. A request ticket is used by the Service Desk for informational purposes. It is the parent ticket.

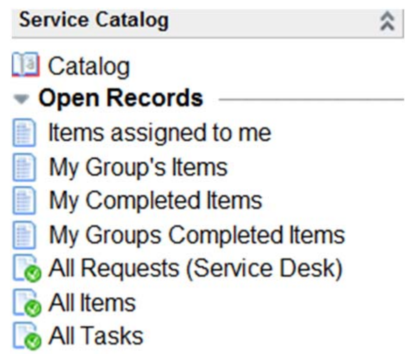
Managing Requests and Requested Items

The business process for fulfillment may be different for items in the catalog, but the following business process can be used to determine the appropriate lifecycle status.

RITM State	Business Process Step
Waiting for Approval	This is the default beginning state. When ownership/work begins on the requested item, move the state to 'Fulfillment.'
Fulfillment	The requested item should be in this state when work is being performed to complete the request. When work is complete and the item is ready for delivery, move the state to 'Delivery.'
Delivery	The requested item should be in this state to acknowledge that the requested item is ready for delivery. Delivery is dependent upon what is requested. Items can be delivered physically or via email.
Closed Complete / Canceled	To acknowledge the completion of the requested item. To cancel a request.

Managing Requests and Requested Items

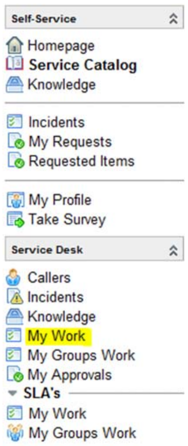
Requests and Requested Items are located in the Service Catalog module.



Catalog – Takes you to the Classic Service Catalog.
Items assigned to me – RITM records that have been assigned to you for completion.
My Group's items – RITM records assigned to my group for completion. These tickets haven't been assigned to an individual.
My Completed Items – RITM records that you have completed.
My Group's Completed Items – RITM records that have been completed by your group.
All Requests (Service Desk) – All REQ records. This is mainly used by the Service Desk.
All Items – All RITM records - A list of all active RITM records.
All tasks – Some Request workflows have tasks associated with them. This link provides a link of tasks associated with request tickets.

Managing Requests and Requested Items

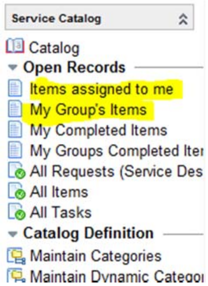
Service Providers can view requests a few different ways.



1. Service Desk –> My Work: This view shows all tickets assigned to you, regardless of record type. Incidents, Requested Items and Tasks are some examples of tickets that will display here.

2. Service Catalog -> Items assigned to me: This view will only show Requested items.

3. Service Catalog -> My Group's items: This view will only show Requested Items.



Managing Requests and Requested Items

Move a ticket into Fulfillment State
Fill in all mandatory fields if not already set.
Select ‘Fulfillment’ within the State field.
Click *save* or *save and exit.*

Moving a ticket into Delivery State
Update the Additional Comments field as work progresses to completion, saving each update.
Select ‘Delivery’ within the State field.
Click *save* or *save and exit*

Moving a ticket into Closed Complete
After delivery of the item, update the additional comments field that the item has been delivered and save your updated.
Select ‘Closed Complete’ within the state field.
Click *save* or *save and exit*

Managing Requests and Requested Items

Watch list functionality exists on Requested items and works the same way as it does for Incident Management.

Managing Requests and Requested Items

Request Record Related Lists

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

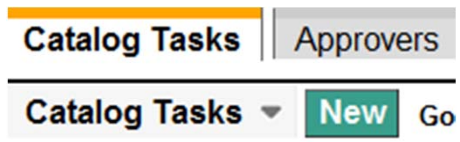
Requested Items – This related list shows the Requested Item tickets that are related to this request.

Approvers / Group Approvers – If Approvals are required, as built in the Requested work flow, they will be displayed here.

Managing Requests and Requested Items

Requested Item Record Related Lists

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



Catalog Tasks – This related list shows the Tasks tickets that are related to this item, if designated in the item workflow.
Approvers – If approvals are required, as built in the Requested Item workflow, they will be displayed here.

Email Notifications

As with Incidents, the end-user gets email for each comment or update made to the ticket—They can collaborate without logging in.

- Request open
- Requested Item resolved
- Comments/updates

Collaborating

Via Email

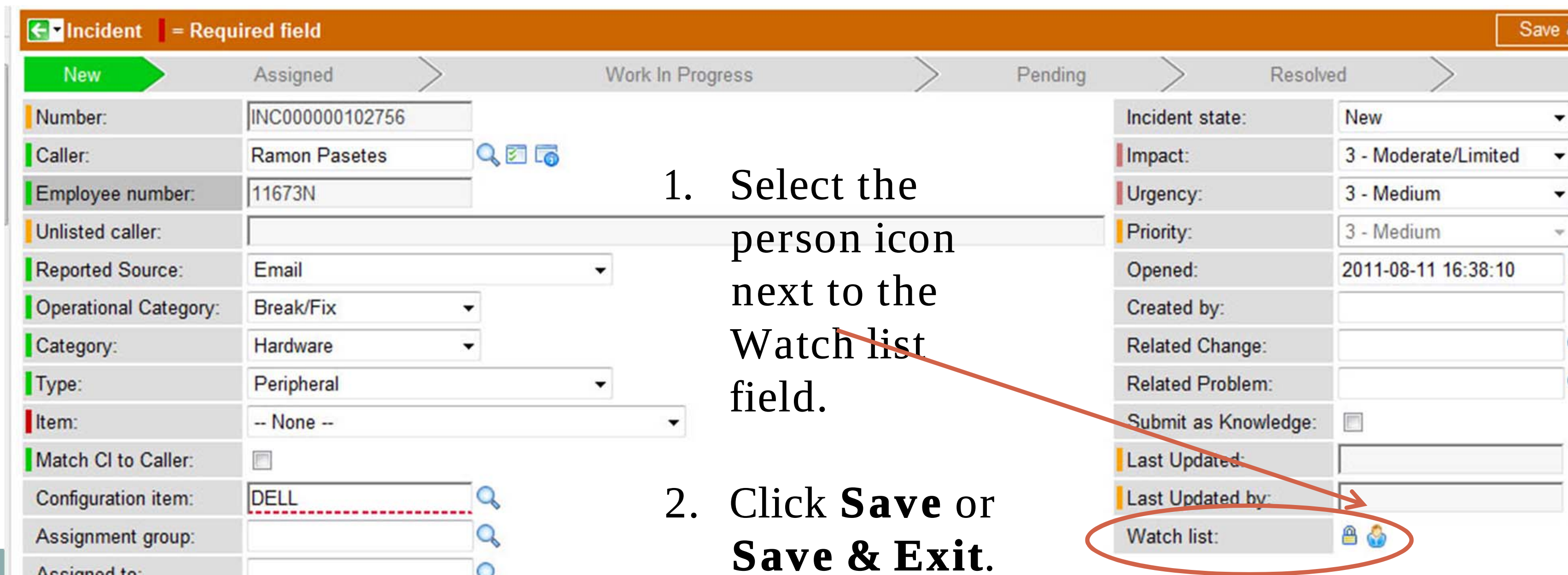
- Email notifications will be sent to Assignee…
  - When ticket is assigned.
  - When a ticket has been commented on.

- If you reply to a system-generated email, the information will be added to the "Additional Comments."

Using the Watch List

- 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



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

Using the Watch List, cont'd

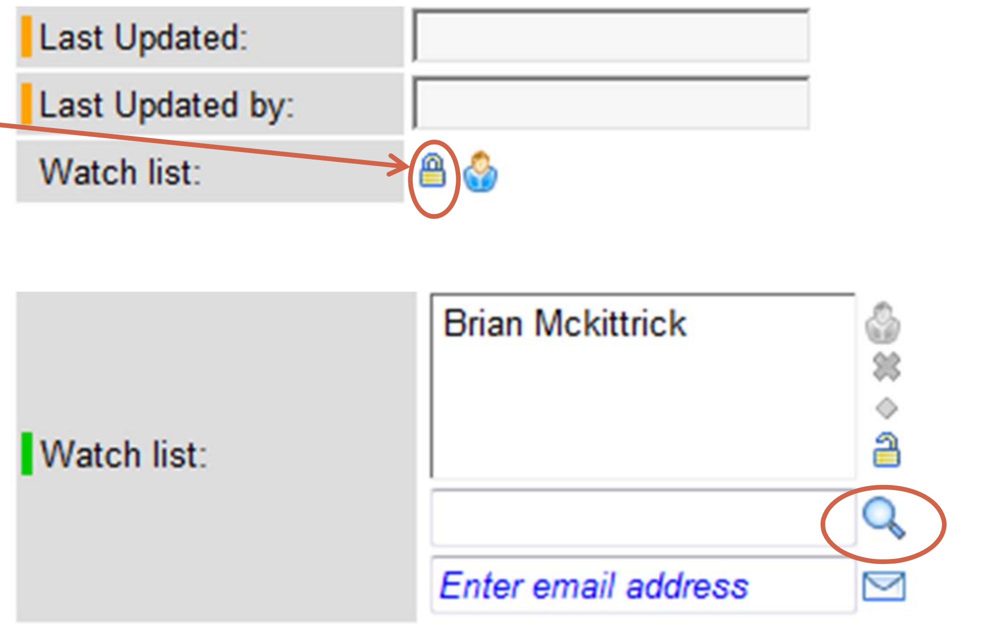
Adding someone else to the watch list for an Incident

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....



Using the Watch List, 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.

Using the Watch List, cont'd

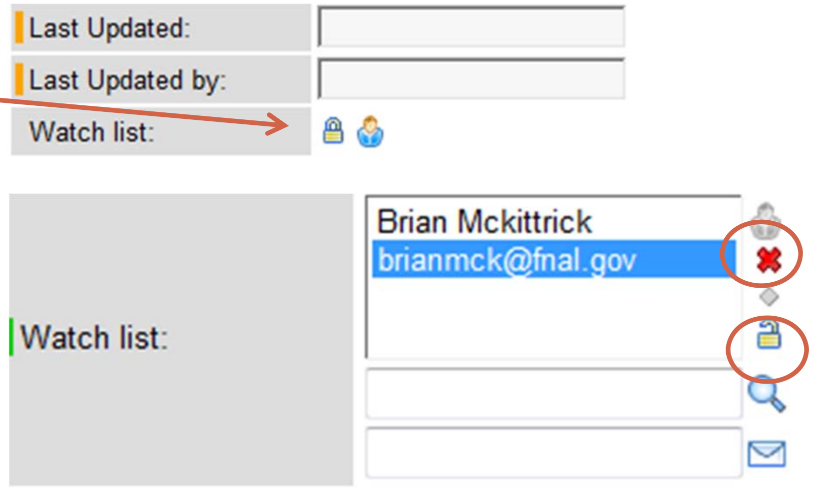
Removing someone from the watch list for an Incident

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.



More Resources

- Service-Now training site: http://fermitrn.service-now.com
- This talk in DocDB: (#4415)
  (It will evolve.)
- Sessions on other training modules will be announced via email.