

# Fermilab Service Provider Training



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**SEPTEMBER/OCTOBER 2011**

# 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 auto-close after 72 hours.
  - Incident Tasks
  - Virtual Organization
  - Enhanced Category Field
- Request Management
  - Entering Requests
  - Managing Requests
- Hands-On m1
  - Creating tickets
  - Managing tickets

Slide 3

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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.

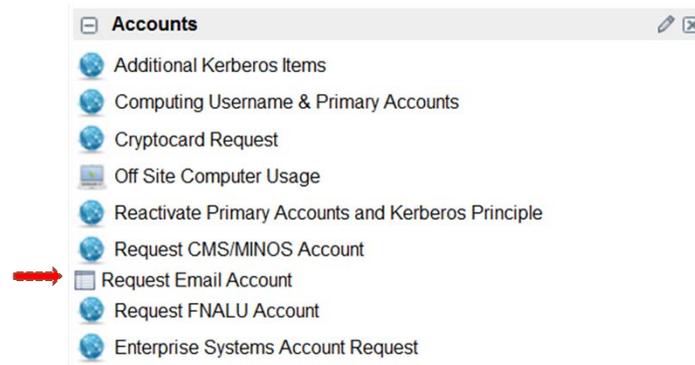
# Entering a Request



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.

The screenshot shows a web form titled "Catalog Item - Request Email Account" with the subtitle "Apply for an Exchange Email Account". The form contains several input fields, some of which are highlighted with a red border to indicate they are mandatory. The fields and their values are as follows:

Field	Value
Your Name	Brian Mckittrick
Fermi ID	15595N
Virtual Organization	Comp. Div.
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

On the right side of the form, there is a button labeled "Order this Item" with a sub-button "Order Now".

# 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.

[← Order Status](#)

**Summary**  
Your request number is **REQ0010433**, which you can use to refer to this request in future interactions with the service desk.

You may also bookmark the following link to get back to [REQ0010433](#).

Note that clicking on the bookmark link (above) will simply take you back to this screen.

Summary	Delivery Date	Stage	Price (ea.)	Qty	Total
<a href="#">Apply for an Exchange Email Account</a>	2011-09-27	   	\$0.00	1	\$0.00
<b>Total:</b>					<b>\$0.00</b>

**Delivery Information**  
Estimated Delivery Date of Complete Order: **2011-09-27**

[← Catalog](#) [Home](#)

# 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

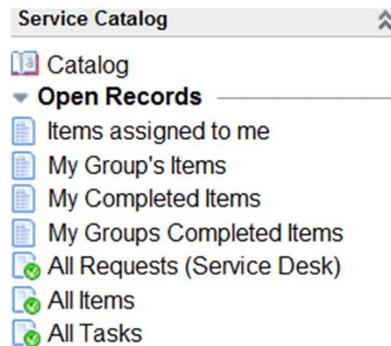


The business process for fulfillment may be different for items in the catalog, but the following business process can be used to determine the appropriate lifecycle status.

<b>RITM State</b>	<b>Business Process Step</b>
<b>Waiting for Approval</b>	This is the default beginning state. When ownership/work begins on the requested item, move the state to 'Fulfillment.'
<b>Fulfillment</b>	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.'
<b>Delivery</b>	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.
<b>Closed Complete / Canceled</b>	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.

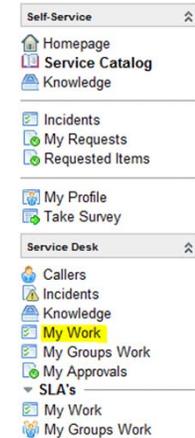
# Managing Requests and Requested Items

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

The screenshot shows the 'Incident' form interface. The form is divided into two main sections: a left-hand section for incident details and a right-hand section for status and metadata. The left-hand section includes fields for Number, Caller, Employee number, Unlisted caller, Reported Source, Operational Category, Category, Type, Item, Match CI to Caller, Configuration item, Assignment group, and Assigned to. The right-hand section includes Incident state, Impact, Urgency, Priority, Opened, Created by, Related Change, Related Problem, Submit as Knowledge, Last Updated, Last Updated by, and Watch list. The Watch list field is highlighted with a red circle and a red arrow pointing to it from the instructions. The instructions are: 1. Select the person icon next to the Watch list field. 2. Click Save or Save & Exit.

Field	Value
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:	<input type="checkbox"/>
Configuration item:	DELL
Assignment group:	
Assigned to:	
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:	<input type="checkbox"/>
Last Updated:	
Last Updated by:	
Watch list:	<input type="checkbox"/>

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....

Last Updated:

Last Updated by:

Watch list:  

Watch list:

Brian Mckittrick   
  
  
  
 

Enter email address

# 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.



A screenshot of a software interface. On the left is a grey box labeled "Watch list:". To its right is a white box containing the name "Brian Mckittrick". Below the name is an empty text input field. Below the input field is the email address "brianmck@fnal.gov". To the right of the input field and email address is a vertical toolbar with icons: a person, a close (X), a lock, a magnifying glass, and an envelope. The envelope icon is circled in red.



A screenshot of the same software interface. The "Watch list:" box now contains the name "Brian Mckittrick" and the email address "brianmck@fnal.gov". The input field is empty. The toolbar icons are the same, but the lock icon is now circled in red.

# 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.

Last Updated:

Last Updated by:

Watch list:  

Watch list:

Brian Mckittrick brianmck@fnal.gov	
	
	
	

# 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.**