ServiceNow

Incident Management

Version 3.1

Rowan University
INFORMATION RESOURCES & TECHNOLOGY

Definition of Commonly Used Terms

ITIL: An acronym for Information Technology Infrastructure Library, ITIL is a set of practices for IT service management (ITSM) that focuses on aligning IT services with the needs of business.

ITSM: IT service management refers to all activities that are performed by an organization to plan, design, deliver, operate and control information technology (IT) services offered to customers. These activities are directed by policies, organized and structured in processes and supporting procedures.

Incident: An unplanned interruption to an IRT Service or a reduction in the quality of an IRT Service. For example: A user's email client stops working.

Service Request: A request submitted by a user for some type of service, software or hardware. Service requests generally refer to something the user wants and/or needs but does not already have, such as a printer or laptop.

Change: The addition, modification or removal of anything that could have an effect on IRT Services.

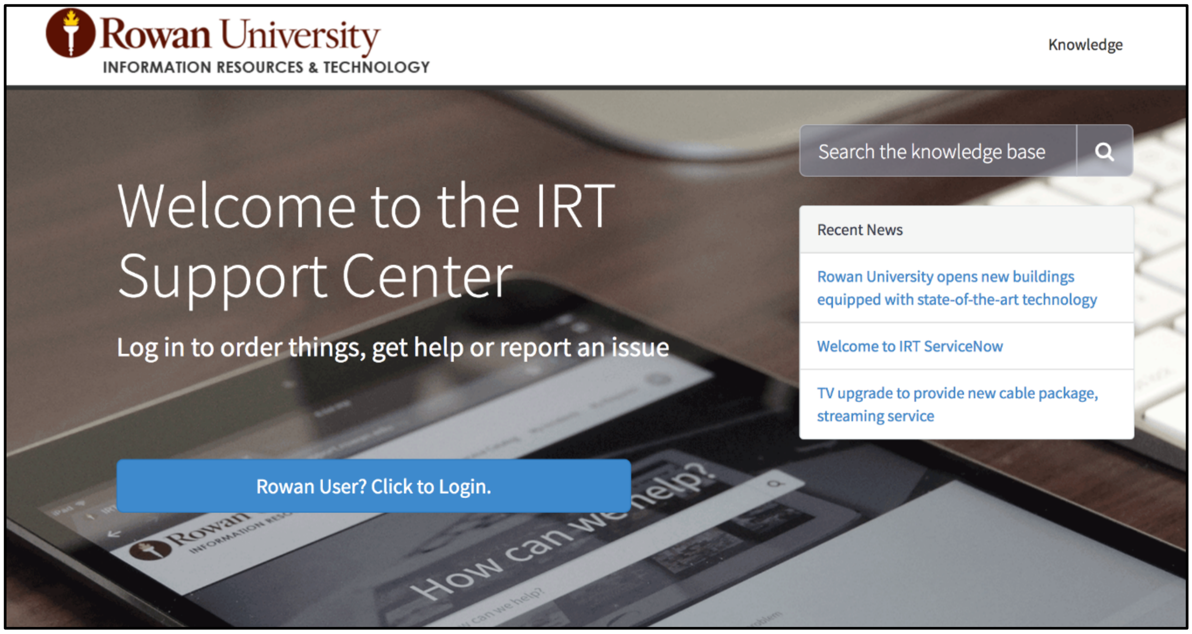
Caller: ServiceNow term for user/customer.

An online version of this document, information about supported browsers and other resources can be found here: http://www.rowan.edu/servicenow-resources

Log into ServiceNow

http://support.rowan.edu (https://test.support.rowan.edu for training)

If you are already authenticated to CAS you may bypass this login page.



Once logged into the Web Portal, click "**Technician**" at the top and you will be redirected to the full ServiceNow application.

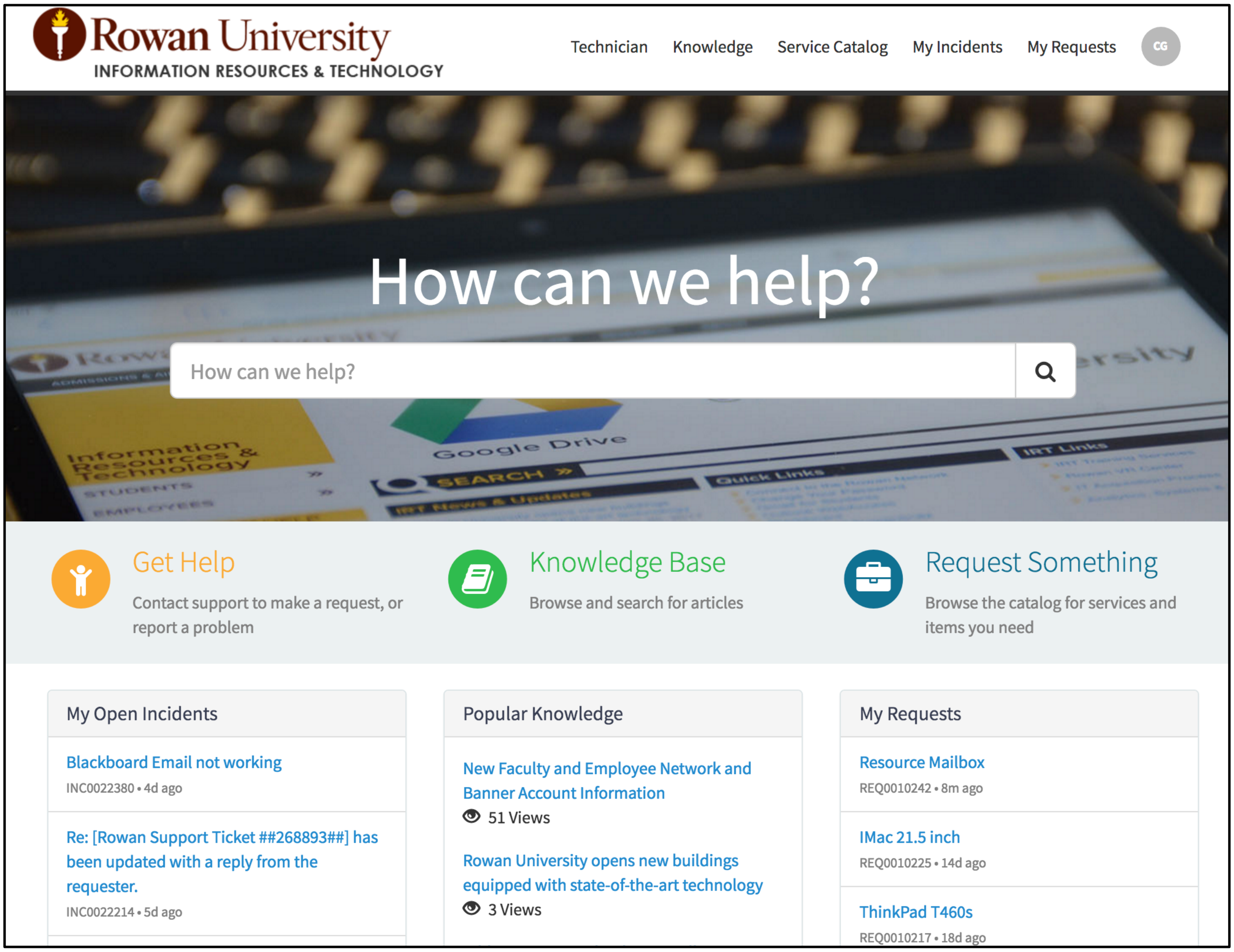
If you are in the application and would like to return to the web portal, you can re-enter the link in your browser with an **/sp** at the end.

Safari Warning: *A recent update to Safari has impacted the appearance of ServiceNow. ServiceNow is aware of the issue and is investigating a resolution. The recommended workaround is to use a different browser, such as Chrome, until the issue can be resolved.*

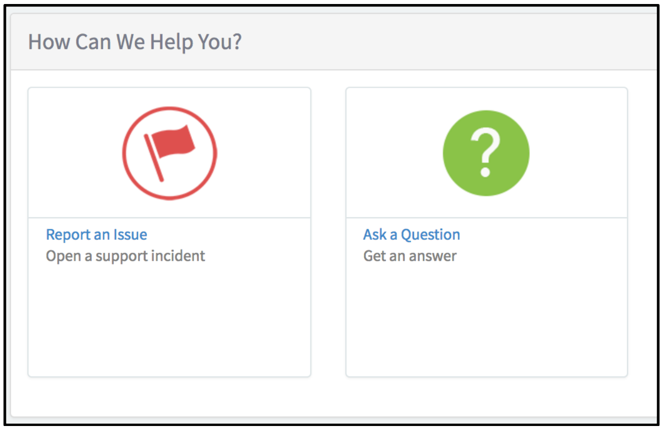
The Support Portal

While technicians can click the **Technician** link in the top menu to open the full application, end users can use the Support Portal to get help, submit an incident or request, check the status of an incident or request and search the knowledge base.

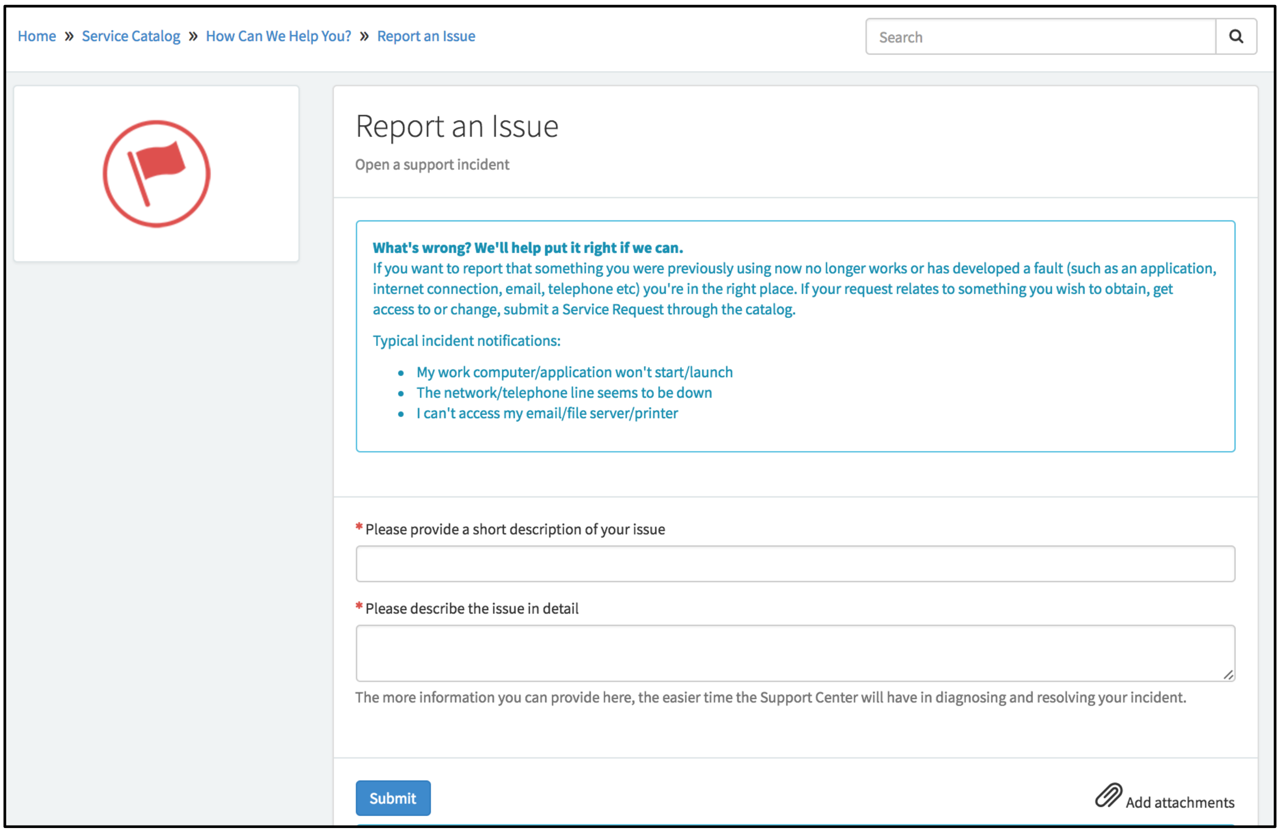
Once logged in, users will see the following:



Users can click **Get Help** and open an incident by selecting "**Report an Issue,**" or Ask a Question.



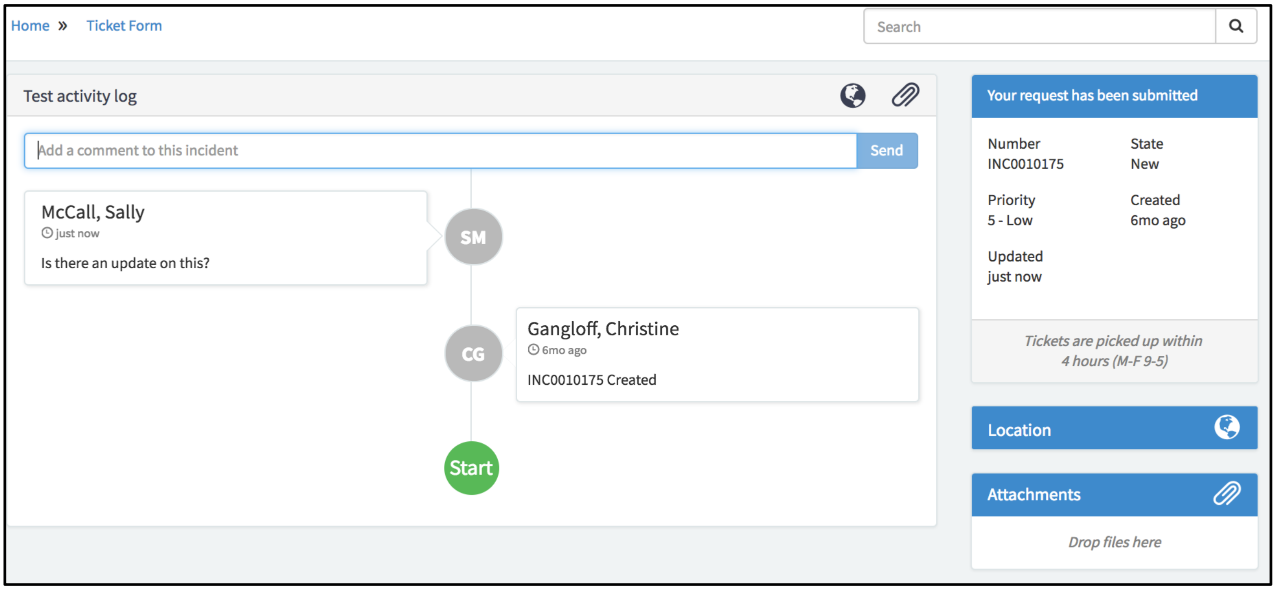
Clicking "**Report an Issue**" will present users with the following form:



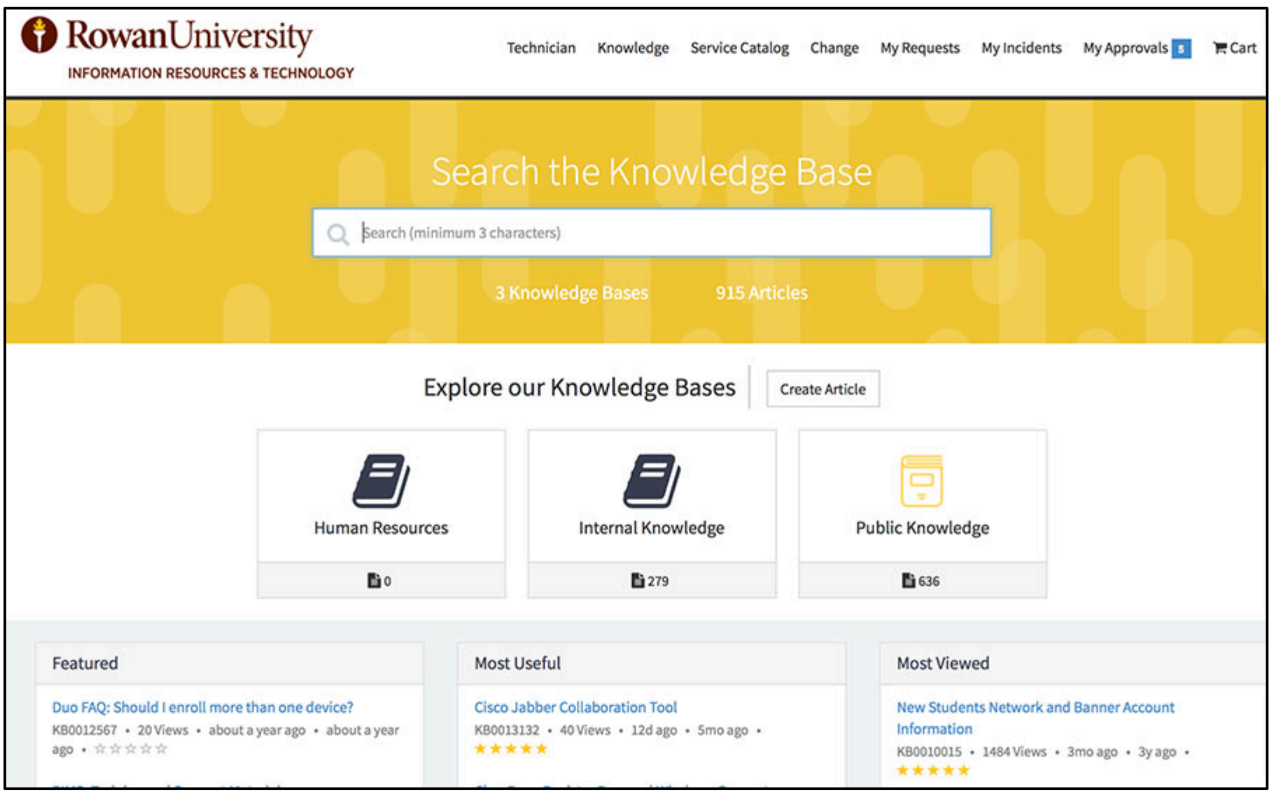
Filling in the form and clicking **Submit** will create an incident.

Users can check the status of their incident at any time by selecting it on the homepage under "**My Open Incidents**"

They can see when the incident was last updated, add a comment to the incident or upload an attachment.



The knowledge base can be searched by typing search terms into the main search bar on the homepage, or clicking "**Knowledge Base.**" From the knowledge home page you can search using the main search field or choose a specific knowledge base to browse or search.

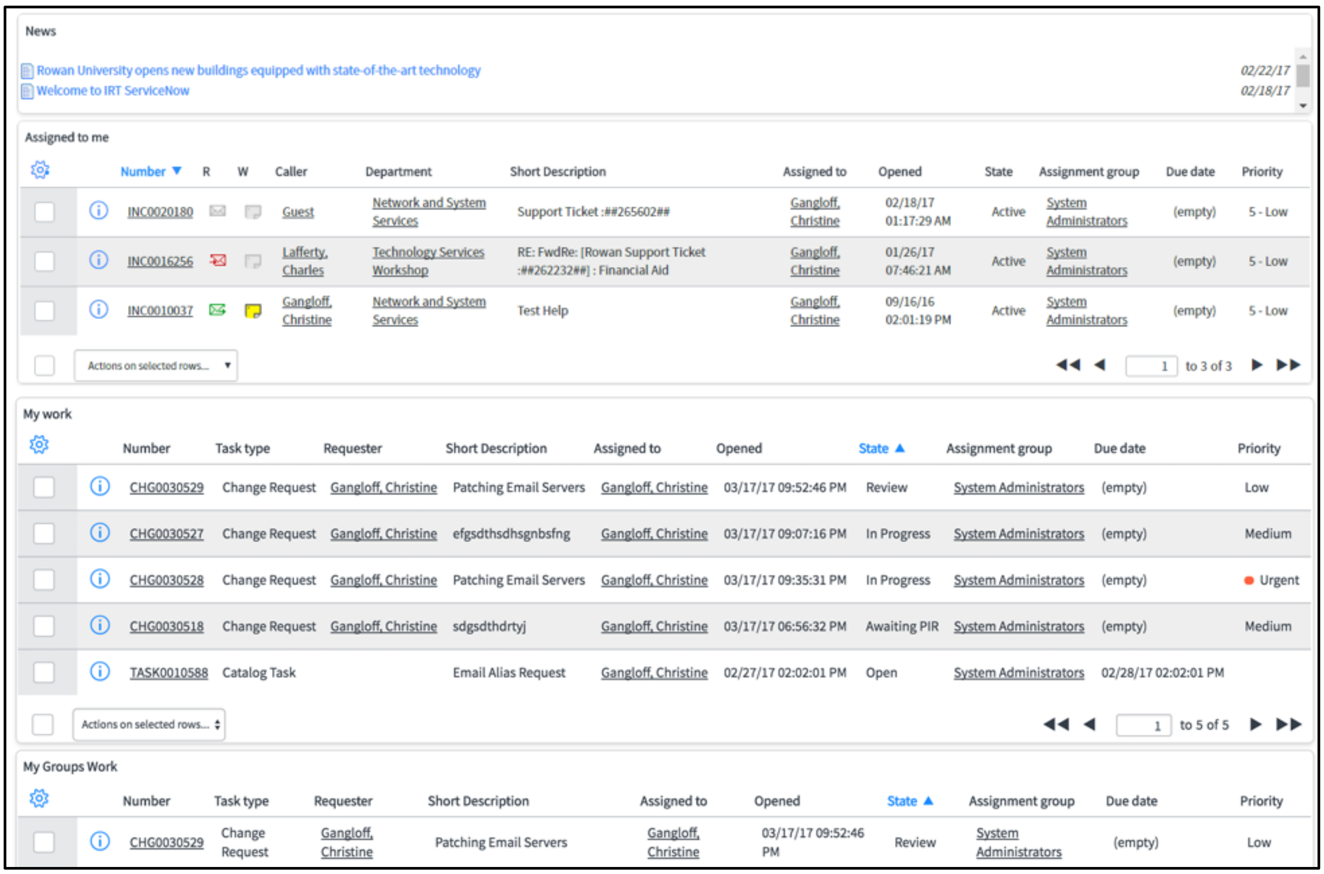


ITIL Homepage

Once logged in to the technician application, you will be presented with a homepage initially tailored to your role. You can add content to your homepage by clicking the + icon in the upper left of the content pane.
You can also remove content by hovering over the content box and clicking on the ⊗ icon that appears in the upper right of the item. This will allow you to create a personalized homepage.

The default homepage is the ITIL Homepage and includes the following content: **News** (Announcements), **Assigned to me** (incidents) and the **My Work** (incidents, tasks and changes assigned to you) and **My Groups Work** (incidents, tasks and changes assigned to your groups) modules.

You can always get back to the homepage by clicking the Rowan University logo in the top left corner of the ServiceNow application.



News

Rowan University opens new buildings equipped with state-of-the-art technology	02/22/17
Welcome to IRT ServiceNow	02/18/17

Assigned to me

Number	R	W	Caller	Department	Short Description	Assigned to	Opened	State	Assignment group	Due date	Priority
INC0020180			Guest	Network and System Services	Support Ticket :##265602##	Gangloff, Christine	02/18/17 01:17:29 AM	Active	System Administrators	(empty)	5 - Low
INC0016256			Lafferty, Charles	Technology Services Workshop	RE: FwdRe: [Rowan Support Ticket :##262232##] : Financial Aid	Gangloff, Christine	01/26/17 07:46:21 AM	Active	System Administrators	(empty)	5 - Low
INC0010037			Gangloff, Christine	Network and System Services	Test Help	Gangloff, Christine	09/16/16 02:01:19 PM	Active	System Administrators	(empty)	5 - Low

Actions on selected rows... 1 to 3 of 3

My work

Number	Task type	Requester	Short Description	Assigned to	Opened	State	Assignment group	Due date	Priority
CHG0030529	Change Request	Gangloff, Christine	Patching Email Servers	Gangloff, Christine	03/17/17 09:52:46 PM	Review	System Administrators	(empty)	Low
CHG0030527	Change Request	Gangloff, Christine	efgsdthsdhsgnbsfng	Gangloff, Christine	03/17/17 09:07:16 PM	In Progress	System Administrators	(empty)	Medium
CHG0030528	Change Request	Gangloff, Christine	Patching Email Servers	Gangloff, Christine	03/17/17 09:35:31 PM	In Progress	System Administrators	(empty)	Urgent
CHG0030518	Change Request	Gangloff, Christine	sdgsdthdrtyj	Gangloff, Christine	03/17/17 06:56:32 PM	Awaiting PIR	System Administrators	(empty)	Medium
TASK0010588	Catalog Task		Email Alias Request	Gangloff, Christine	02/27/17 02:02:01 PM	Open	System Administrators	02/28/17 02:02:01 PM	

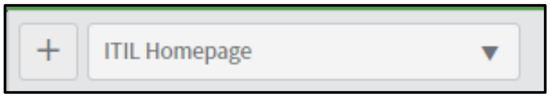
Actions on selected rows... 1 to 5 of 5

My Groups Work

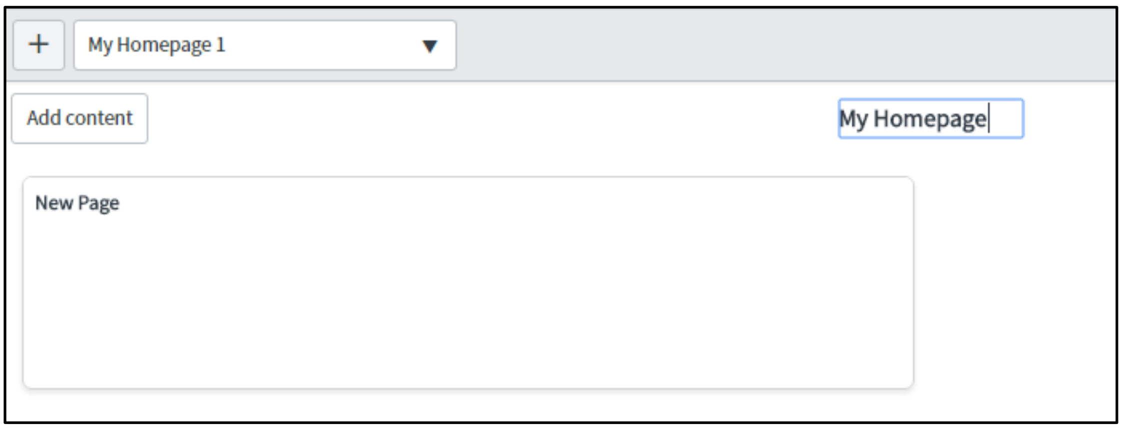
Number	Task type	Requester	Short Description	Assigned to	Opened	State	Assignment group	Due date	Priority
CHG0030529	Change Request	Gangloff, Christine	Patching Email Servers	Gangloff, Christine	03/17/17 09:52:46 PM	Review	System Administrators	(empty)	Low

Adding Content to a Homepage

You can create a custom homepage for yourself with any content you would like. Instead of adding and removing content from the ITIL Homepage, we recommend creating your own personal homepage. You can do this by clicking the plus in the upper left next to the ITIL Homepage drop-down.



You can then edit this homepage's title.



From there, you can select "**Add content**" and add any Gadgets, Gauges or Reports you'd like.

This document will not go into homepage specifics, but you can use the following references from ServiceNow:

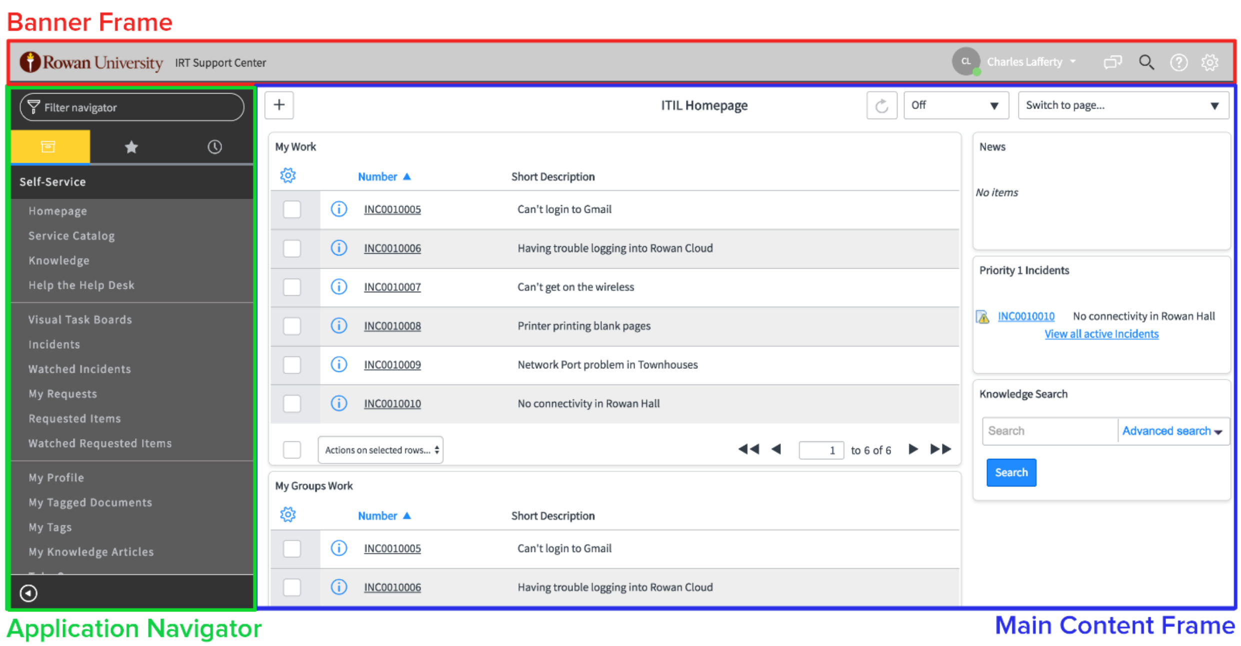
- Add content to a homepage: https://docs.servicenow.com/bundle/istanbul-servicenow-platform/page/administer/homepage-administration/task/t_AddContentToAHomepage.html
- Add reports to a homepage: https://docs.servicenow.com/bundle/istanbul-servicenow-platform/page/use/homepages/task/t_AddExistingGaugesToHomepage.html
- Homepage items: https://docs.servicenow.com/bundle/istanbul-servicenow-platform/page/use/homepages/reference/r_AddHomepageItems.html

Navigation Overview

User Interface

The user interface is divided into the following areas:

• **Banner frame:** Runs across the top of every page and contains the Rowan logo, global text search, help and a gear icon which displays the system menu with additional settings and controls.
• **Application navigator or left-navigation bar**: Provides links to all applications and modules.
• **Main Content frame**: Displays information such as lists, forms and homepages.



Applications and Modules

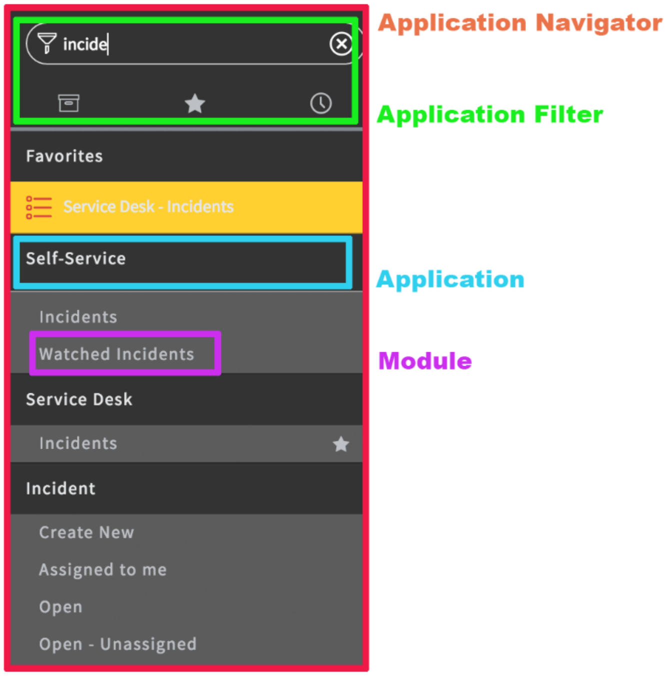
An application is a group of modules, or pages, that provide related information and functionality in ServiceNow. For example, the Incident application contains modules for creating and viewing incidents; the Change application contains modules for creating and viewing changes etc.

Application Navigator

The application navigator, or left-navigation bar, provides links to all applications and the modules they contain, enabling users to quickly find information and services.

In the application navigator, you will see black rectangular boxes. These boxes represent "**Applications**" within ServiceNow. The number of Applications available to you will vary according to your role. Click on any of the black rectangular boxes to expand and collapse the Application area.

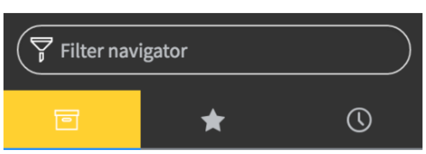
Upon expanding an Application, it will be highlighted yellow and you will see a number of links related to that Application. These links are referred to as "**Modules**" within ServiceNow. To have a module open in the main content frame, click the module name.



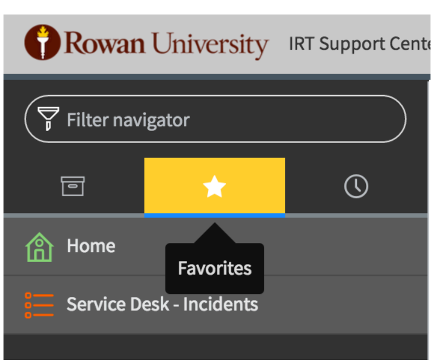
Application Navigator Header

The application navigator header provides the following tools:

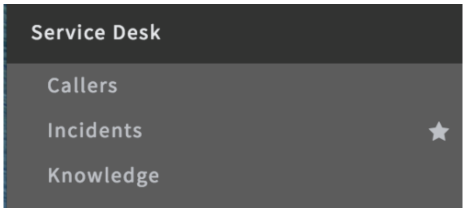
The Application Filter: Filters the applications and modules that appear in the navigator based on the filter text. The easiest way to find what you are looking for is to type a search term into the navigator describing the application or module you are looking for, such as "incident," to filter the items containing that word.



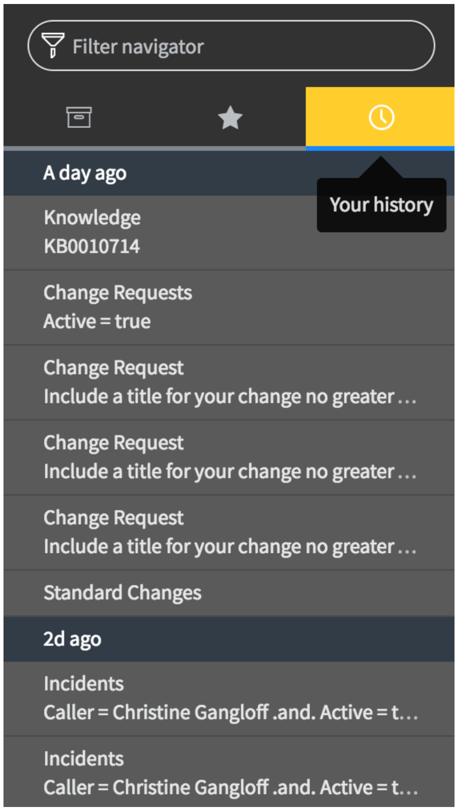
The Favorites Filter (the star icon): Filters the application navigator to show modules marked as favorites.



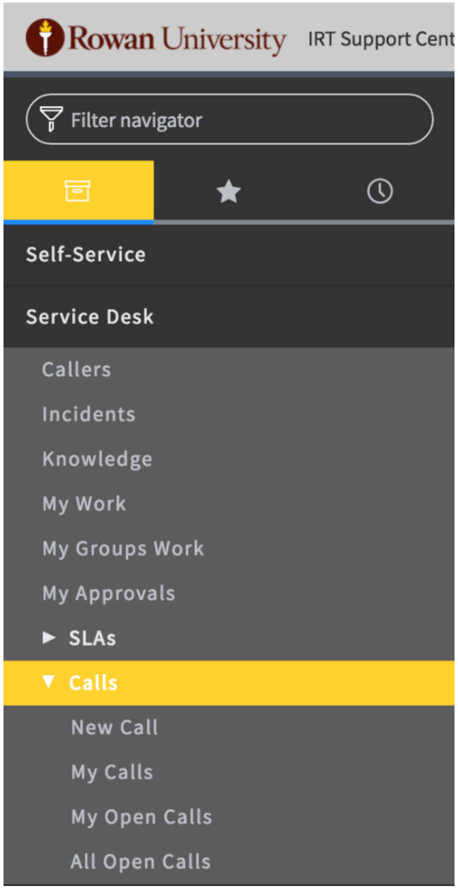
Each module has a **star icon** beside its name when you hover over it. The star icon can be selected to designate frequently-used modules that will then display under **Favorites** in the application navigator.



Your History (the clock icon): Displays items you have recently accessed in chronological order.



The Service Desk Application



The Service Desk application groups together many commonly-used modules.

Callers: A list of University users and affiliates.

Incidents: Active incidents listed in your assignment groups.

Knowledge: The University knowledge base that contains support documentation, procedural documentation and customer-specific documentation.

My Work: Active incidents, tasks and changes that are assigned to you.

My Groups Work: An extension of the My Work view that shows all of your work as well as your group's active incidents, tasks and changes.

My Approvals: Used for Change Managers, Knowledge Admins and some Service Catalog requests.

SLAs: This module will show you what incidents assigned to you or your group is nearing the targeted completion time. An **SLA** is an agreement between IRT and our customers that describes the service and documents service level targets.

SLA Target Times:

- Low: Resolved within 7 business days
- Moderate: Resolved within 5 business days
- High: Resolved within 3 business days
- Critical: Resolved within 1 business days

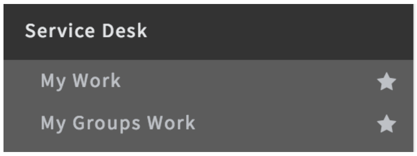
Calls:

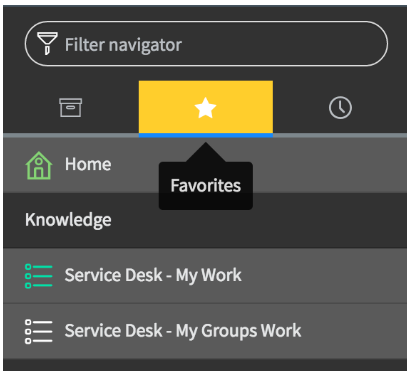
New Call: Used to create a new incident from a phone call.
My Calls: Calls assigned to you no matter the state.
My Open Calls: Calls assigned to you that are currently open.
All Open Calls: Shows all open calls.

My Work and My Groups Work

The "**My Work**" and "**My Groups Work**" modules from within the Service Desk application can be used to manage incidents, changes and tasks assigned to you and your group. If you are just looking at lists within the Incident application, for example, you may miss other tasks assigned to you.

You can add these modules to your Favorites by hovering over them and clicking the Star Icon.





These modules are also available on the ITIL homepage which you can always get back to by clicking the Rowan University logo in the top left corner of the ServiceNow application.

The **My Work** module shows any incidents, tasks and changes assigned to you.
The **My Groups Work** module shows any incidents, tasks and changes assigned to the groups you are a member of.

Across the top of the list in both "**Work**" views, you will see the following columns:

Number	R	W	Short Description	Task type	Requester	Assigned to	Opened	State	Assignment Group	Priority
CHG0030913			Windows Server Patching Activity	Change Request	Gangloff, Christine		04/04/17 09:06:56 PM	Scheduled	System Administrators	Medium
CHG0030912			Microsoft Windows Patching	Change Request	Gangloff, Christine		04/04/17 09:06:49 PM	Draft	System Administrators	Low
CHG0030909			Linux Server Storage - {servername}	Change Request	Gangloff, Christine		04/04/17 09:04:48 PM	Draft	System Administrators	Low
INC0022559			Caller's email not working	Incident	Mikkelson, Rolf	Gangloff, Christine	04/03/17 04:12:47 PM	Active	System Administrators	5 - Low

Number: Click this number to open the incident, change or task.
Reply Status [R] Column: Shows communication updates between the caller and technician.

- This incident has no comments associated with it.
- The technician who is currently logged in to ServiceNow made the last comment on this incident.
- A user other than the logged in user made the last comment. This could either by the user who submitted the ticket or another technician.

Work Notes [W] Column: Indicates if a work note has been added to the incident.

- This incident has no Work Note associated with it.
- This incident has a Work Note associated with it.

Short Description: The short description on the change, incident or task form.
Task Type: This shows whether the item is an incident, change or task.
Requester: If the task type is an incident, this will show the caller who reported it. If you click their hyperlinked name it will display their user information. If the task type is a change or catalog task, this will show the customer who requested it.
Assigned to: Displays the name of the technician the incident, change or task is assigned to.
Opened: The Date and time that the incident, change or task was opened.
State: The current status of the incident, change or task, such as "New", "Scheduled" or "Resolved."
Assignment Group: The group that the incident, change or task is assigned to.
Priority: The level of priority assigned to the incident, change or task based on Impact and Urgency.

At the top of the list, in blue, it displays a "breadcrumb" that shows what Groups you are a member of and the states it is filtering.

All > Assignment group = (ServiceNow Admins, System Administrators) > Active = true > Assigned to = (empty) > State != Pending

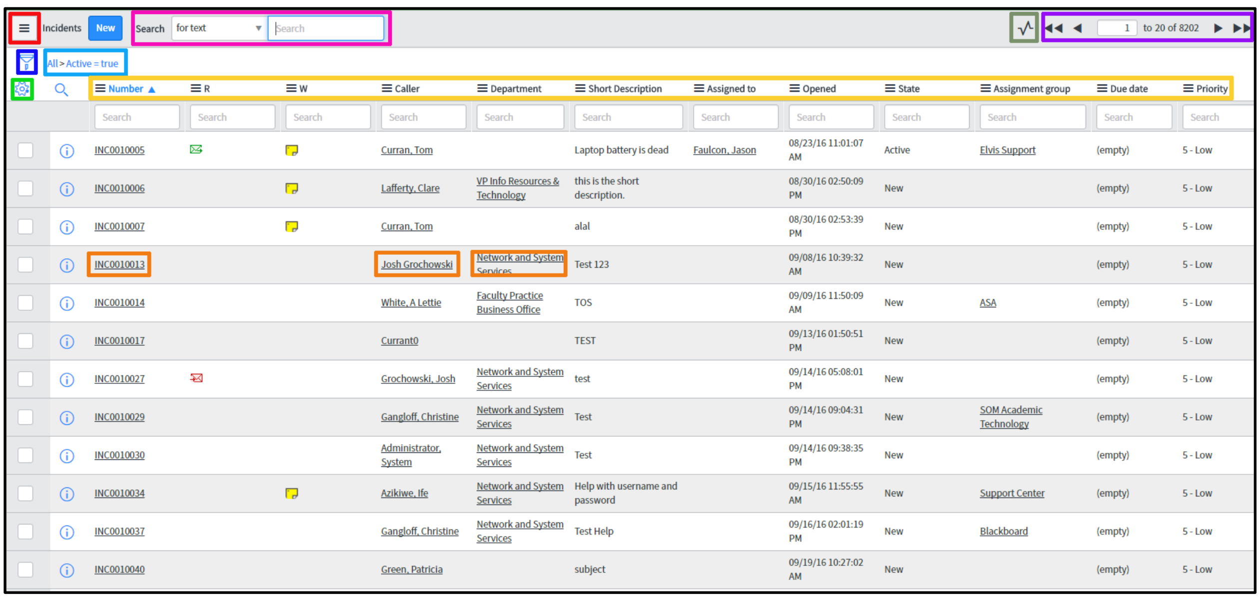
Working with Lists

Most data in ServiceNow; incidents, changes, tasks, user records etc., is viewed in lists.

This section will explain how to search, sort and filter that data.

The following functions help navigate and define lists:

- Title Menu
- Go to / Search
- Activity Stream
- List Navigation
- Filter
- Breadcrumb Navigator
- Personalize List Gear
- Hyperlinked Fields
- Column Headings



Incidents New Search for text Search

1 to 20 of 8202

All > Active = true

Number ▲	R	W	Caller	Department	Short Description	Assigned to	Opened	State	Assignment group	Due date	Priority
Search	Search	Search	Search	Search	Search	Search	Search	Search	Search	Search	Search
INC0010005			Curran, Tom		Laptop battery is dead	Faulcon, Jason	08/23/16 11:01:07 AM	Active	Elvis Support	(empty)	5 - Low
INC0010006			Lafferty, Clare	VP Info Resources & Technology	this is the short description.		08/30/16 02:50:09 PM	New		(empty)	5 - Low
INC0010007			Curran, Tom		alal		08/30/16 02:53:39 PM	New		(empty)	5 - Low
INC0010013			Josh Grochowski	Network and System Services	Test 123		09/08/16 10:39:32 AM	New		(empty)	5 - Low
INC0010014			White, A Lettie	Faculty Practice Business Office	TOS		09/09/16 11:50:09 AM	New	ASA	(empty)	5 - Low
INC0010017			Currant0		TEST		09/13/16 01:50:51 PM	New		(empty)	5 - Low
INC0010027			Grochowski, Josh	Network and System Services	test		09/14/16 05:08:01 PM	New		(empty)	5 - Low
INC0010029			Gangloff, Christine	Network and System Services	Test		09/14/16 09:04:31 PM	New	SOM Academic Technology	(empty)	5 - Low
INC0010030			Administrator, System	Network and System Services	Test		09/14/16 09:38:35 PM	New		(empty)	5 - Low
INC0010034			Azikiwe, Ife	Network and System Services	Help with username and password		09/15/16 11:55:55 AM	New	Support Center	(empty)	5 - Low
INC0010037			Gangloff, Christine	Network and System Services	Test Help		09/16/16 02:01:19 PM	New	Blackboard	(empty)	5 - Low
INC0010040			Green, Patricia		subject		09/19/16 10:27:02 AM	New		(empty)	5 - Low

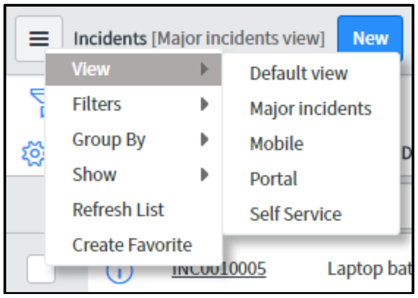
Default List View: If you don't see all of the fields or columns you should on a list, check to make sure you are in the "**Default**" view. The other views, such as the "Self-Service" view, are limited and what the end user would typically see. Change your view back to the Default view from the Title Menu.

Title Menu

Clicking the hamburger icon (☰) in the top left of the main content frame will bring up the title menu.

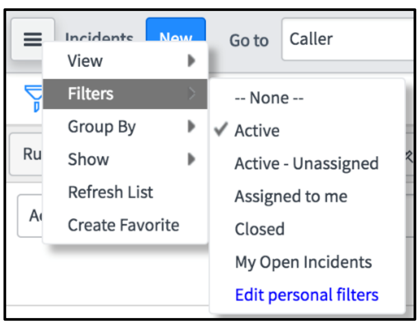
From the Title menu, you can perform the following functions:

View: Changes the view of your list. You may not see all views as some are restricted by role

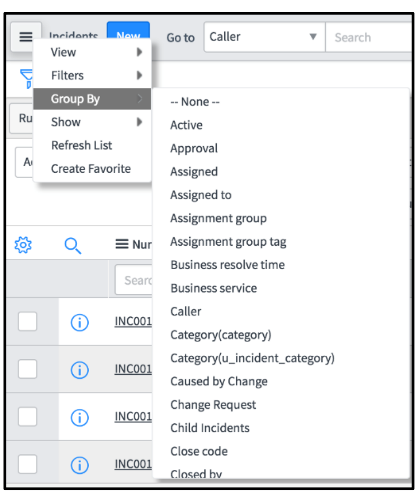


*If you don't see all of the fields or columns you should, check to make sure you are in the "**Default view**." Some other views are limited and only show what the end user would typically see (the Self-Service view, for example).*

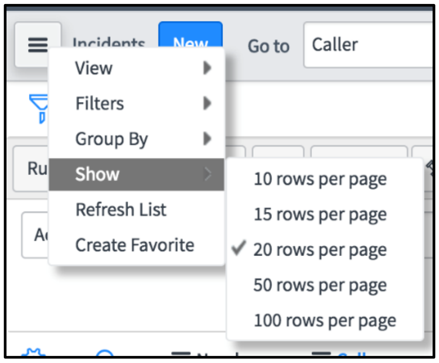
Filters: Applies a saved filter or allows you to edit a personal filter. The filters available will change depending on the list view you are currently in.



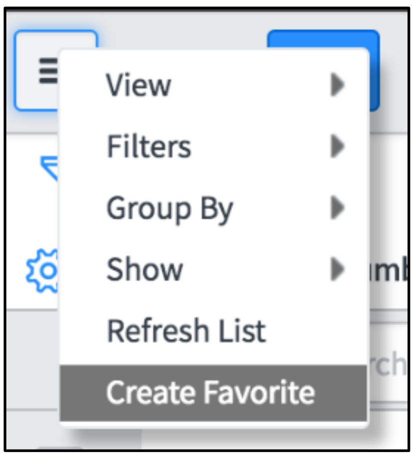
Group By: Groups records by a specific field.



Show: Changes the maximum number of records per page.



Create Favorite: Adds a record, list or filter to your **Favorites** menu.

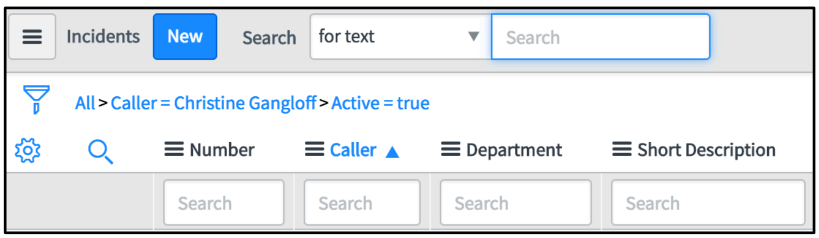


Search (Go to)

A "Go to" search option is available that allows you to filter and search lists by column name. For example, you can enter a specific caller name to filter the **Caller** field or change the dropdown to "Number" and enter a specific incident number.

You also have the option to perform a general text search.

Change the drop-down to "for text" and the "Go to" designation changes to "Search." You can then search by more general terms.



The "Go to" search works specifically on the current list but there is also a Global Search icon in the far upper right corner of the page.

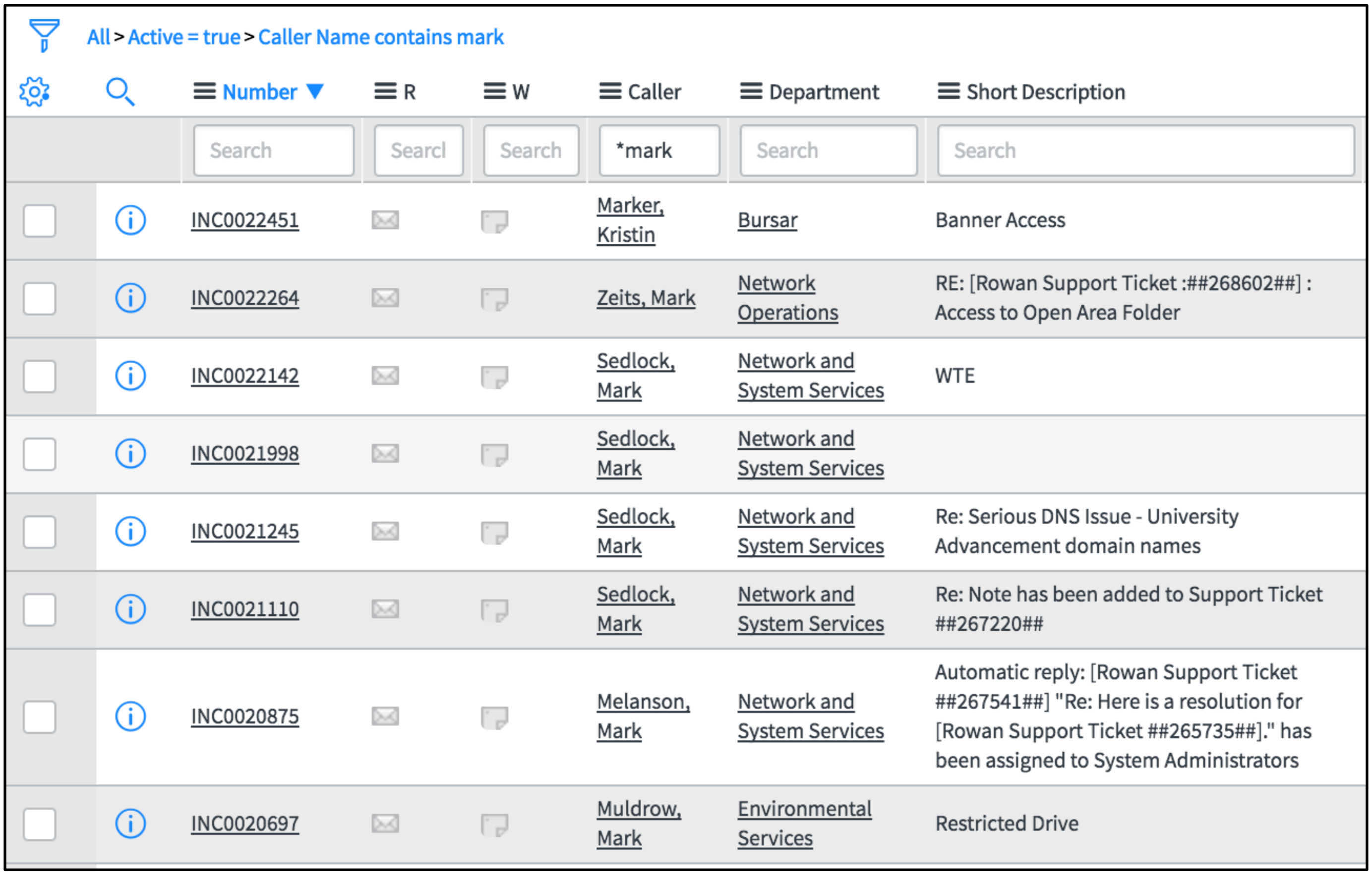
The global search looks through all of ServiceNow for your query. For example, you can search for a particular record, whether it be an incident, change or request, by typing the record's exact number in the global search bar.

Using Wildcard Searches

The following wildcards can be used when searching in ServiceNow to refine search results.

Wildcard	Search Results
*searchterm	Contains
searchterm%	Starts With
%searchterm	Ends With
!*searchterm	Does Not Contain
=searchterm	Equals
!=searchterm	Does Not Equal

For example, searching the Caller column for ***mark** will show only records that contain the word "mark."



All > Active = true > Caller Name contains mark

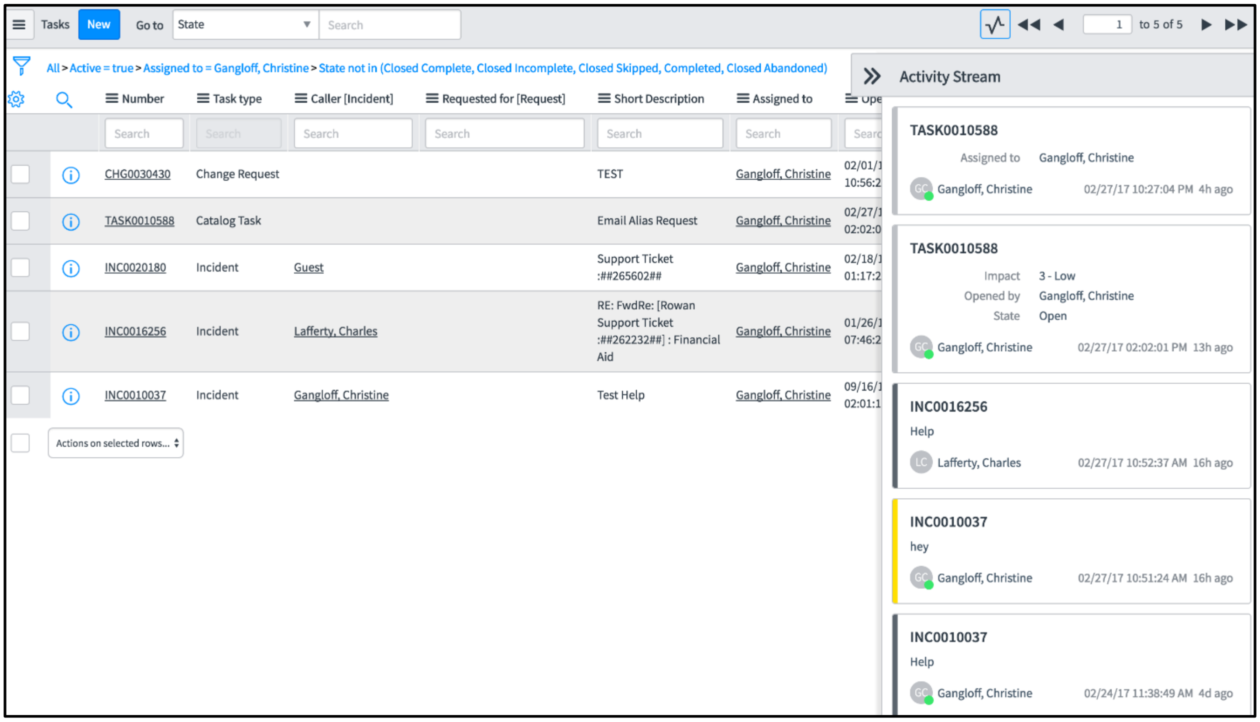
		Number ▼	R	W	Caller	Department	Short Description
		Search	Searcl	Search	*mark	Search	Search
		INC0022451			Marker, Kristin	Bursar	Banner Access
		INC0022264			Zeits, Mark	Network Operations	RE: [Rowan Support Ticket :##268602##] : Access to Open Area Folder
		INC0022142			Sedlock, Mark	Network and System Services	WTE
		INC0021998			Sedlock, Mark	Network and System Services	
		INC0021245			Sedlock, Mark	Network and System Services	Re: Serious DNS Issue - University Advancement domain names
		INC0021110			Sedlock, Mark	Network and System Services	Re: Note has been added to Support Ticket ##267220##
		INC0020875			Melanson, Mark	Network and System Services	Automatic reply: [Rowan Support Ticket ##267541##] "Re: Here is a resolution for [Rowan Support Ticket ##265735##]." has been assigned to System Administrators
		INC0020697			Muldrow, Mark	Environmental Services	Restricted Drive

Activity Stream

Clicking the Activity Stream icon  on the top menu bar will show you all current updates to the tasks, incidents and changes on any list.

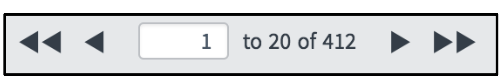
The Activity Stream window shows live information for all records on the current list and updates automatically.

More information on using the Activity Stream can be found later in this document.



List Navigation

You can move between list pages using the navigation pictured here:



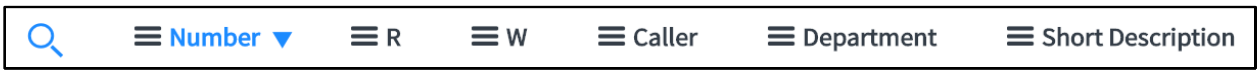
In the box with "1" you can enter the desired starting record number. For example, in a list displaying 20 records at a time, entering 12 in the box would display records 12 through 31. The single arrows allow you to navigate backward or forward through the list one page a time. The double arrows allow you to move to the beginning or end of the list.

Column Headings

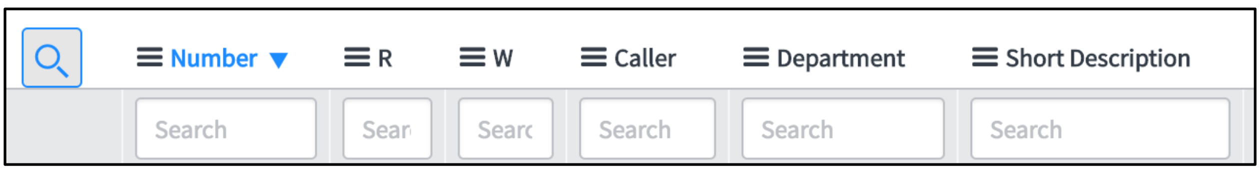
Clicking on a column name gives you the following capabilities:

Sorting: Click the column name to sort the list in ascending order.

Click again to sort in reverse order.



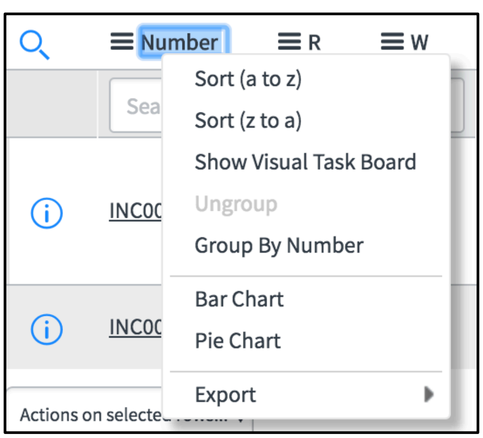
Search: Click the search icon to the left of the column headings to show individual search boxes for each column.



Begin your query with an asterisk “*” to find all records containing your search string, or begin the query with a “%” to find records that end with the input.

Right-clicking a column name or clicking the hamburger icon (☰) to the left of the column name opens these controls:

Sort: Arranges the column alphabetically from (a to z) or (z to a).
Group By: Aggregates records by field.
Bar and Pie Chart: Create quick bar and pie chart reports based on the filter criteria of the list. Technicians can then modify these reports or create gauges.
Export: Exports data to Excel, CSV or PDF.



Using Filters and Breadcrumbs

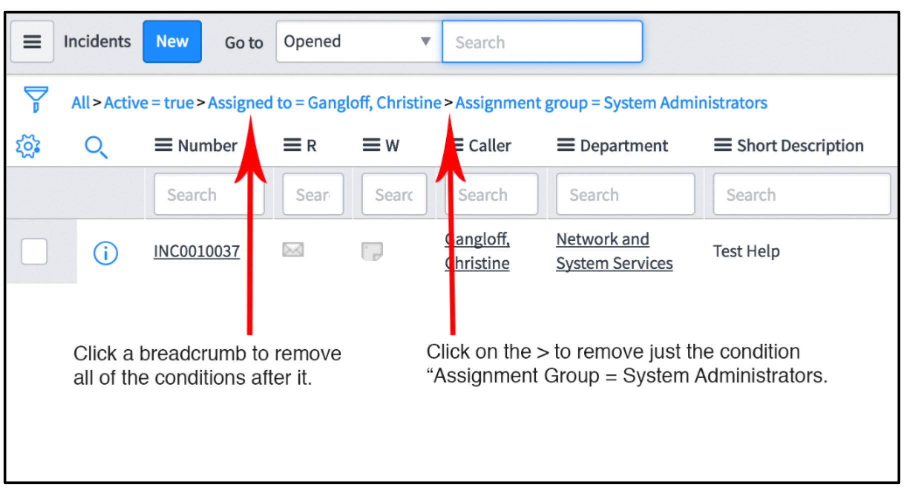
A filter is a set of conditions applied to a list. Users can apply, modify, create and save filters. The current filter is indicated by a hierarchical list of conditions—or breadcrumbs—at the top of the list.

Breadcrumbs

As you search, a set of blue hyperlinks, called **Breadcrumbs**, will appear showing your search criteria.

Breadcrumbs offer a quick form of filter navigation. The breadcrumbs are ordered from left to right, from most general to most specific.

Clicking a breadcrumb removes all of the conditions to its right. Clicking the condition separator (>) before a condition removes only that condition.

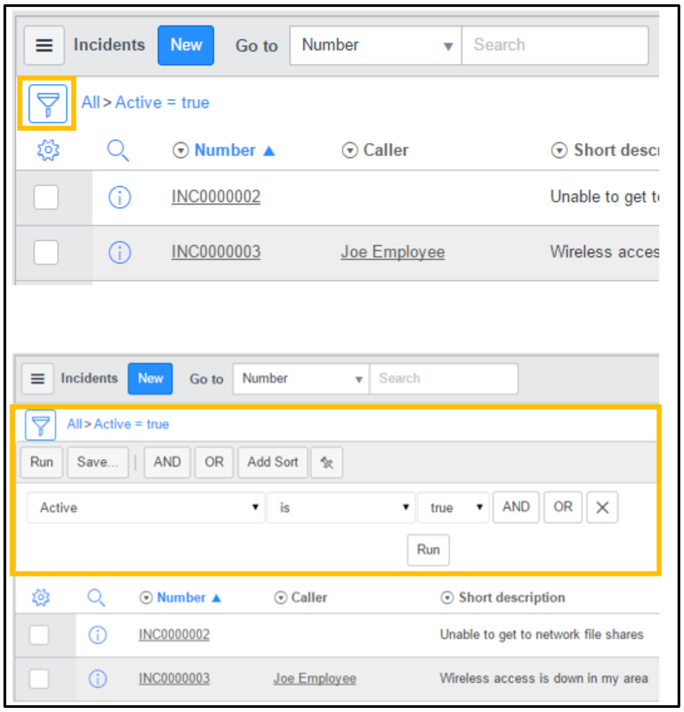


Filters

There are two ways to filter lists.

Use the Filter icon

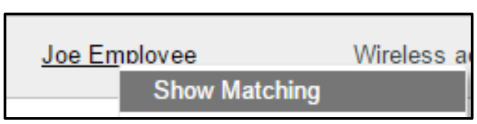
- Click the filter icon to display the filter logic builder
- Use this method if you know the logic that you want to use to filter your list
- After you have your filter created, click "Run"



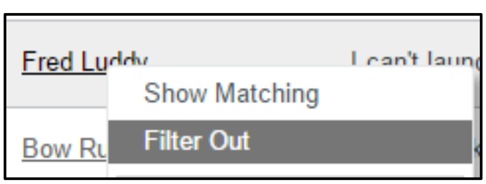
Use Show Matching and Filter Out

Right-click on a field in any column that is displayed in a list

"**Show matching**" will filter on that specific field



"**Filter out**" will remove the field from view



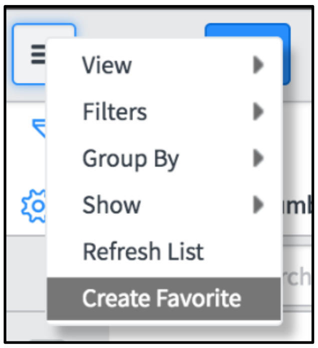
Saving Filters

You can either save filters to your **Favorites** or to the **Title** menu

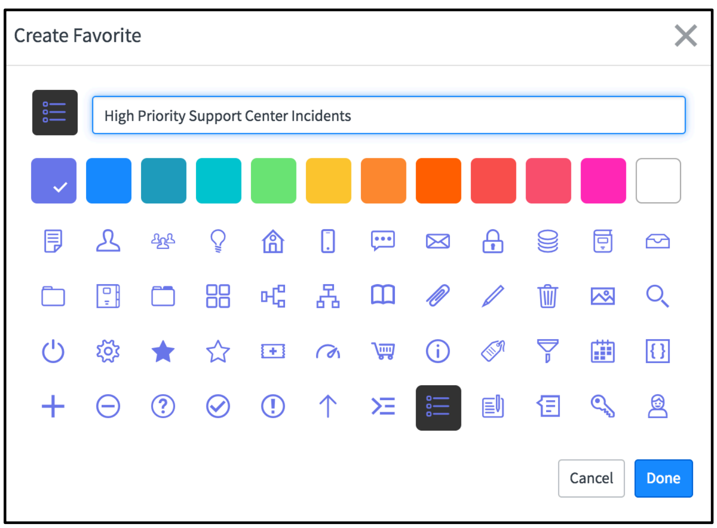
To save a filter:

Create or modify a filter and run it to see if it gives you the results you are looking for.

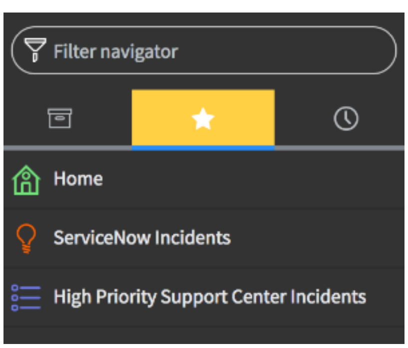
If you are satisfied with the results, click **Create Favorite** in the title menu.



You can then name your filter and choose an icon and color if desired.



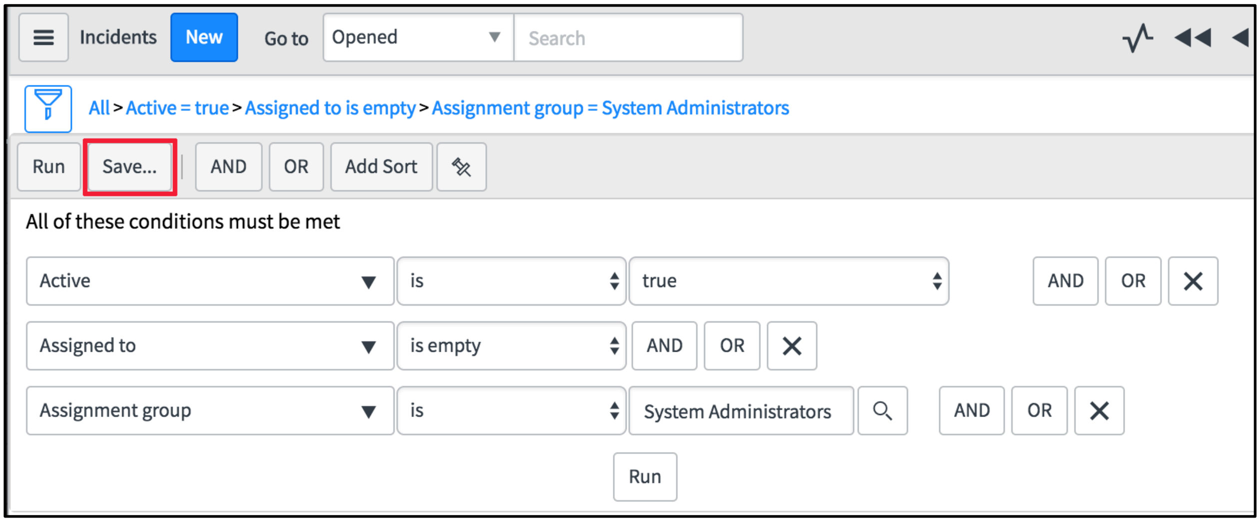
The saved filter will then show up in your **Favorites** menu:



Save a filter to the Title Menu

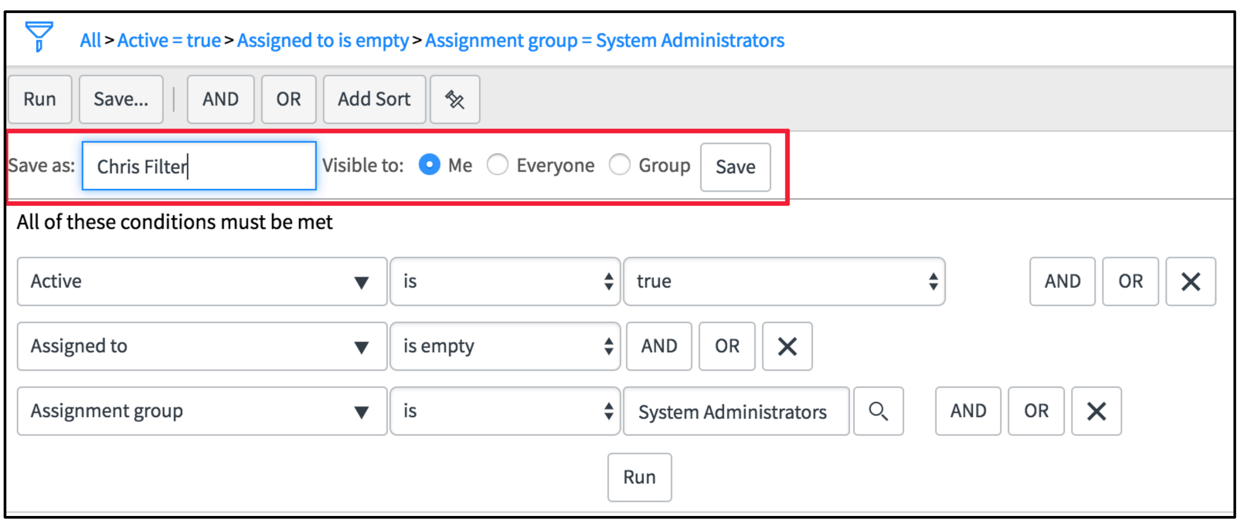
Create or modify a filter and run it to see if it gives you the results you are looking for.

If you are satisfied with the results, click the filter icon again to re-open it and click **Save**.

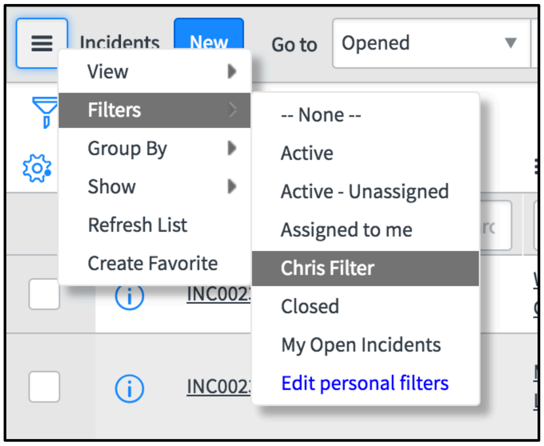


Enter a name for the filter in the **Save as** field, select who the filter will be visible to and click **Save**.

To create a personal filter (all users), select Me
To create a global filter (requires access rights), select Everyone
To create a filter for a specific user group (requires access rights), select Group and then enter or search for the group name



The filter will then be saved in the title menu under **Filters**:

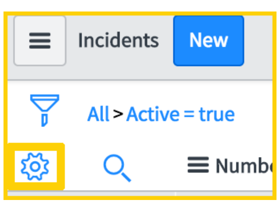


PLEASE NOTE: A filter saved to the title menu will only be available from within application where it was created.

If you don't see your saved filter, please check to see what application you are in to the right of the Title menu icon. If you saved a filter for changes, it will only show up if you are in a list within the change application.

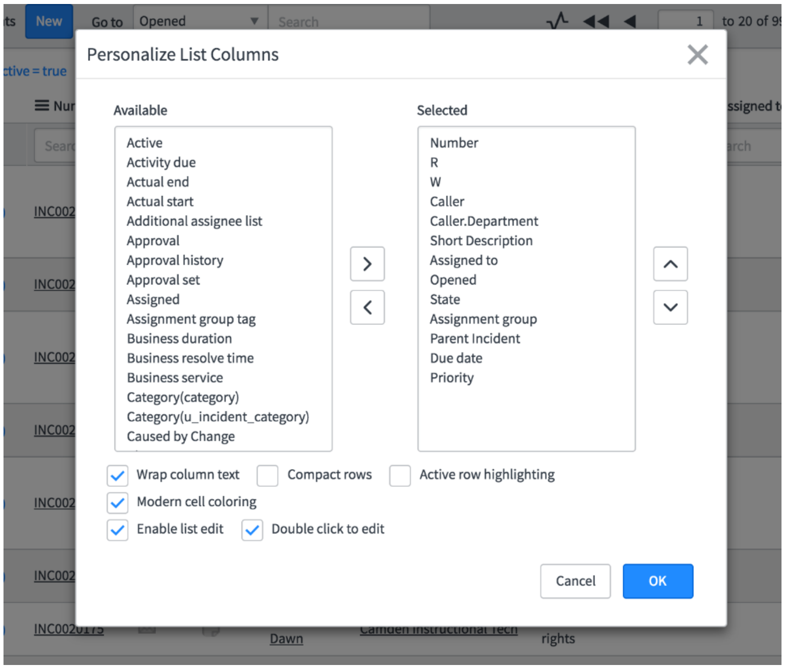
Personalize Lists

You can customize the appearance of lists by clicking the "**gear**" icon in the upper left corner of a list.

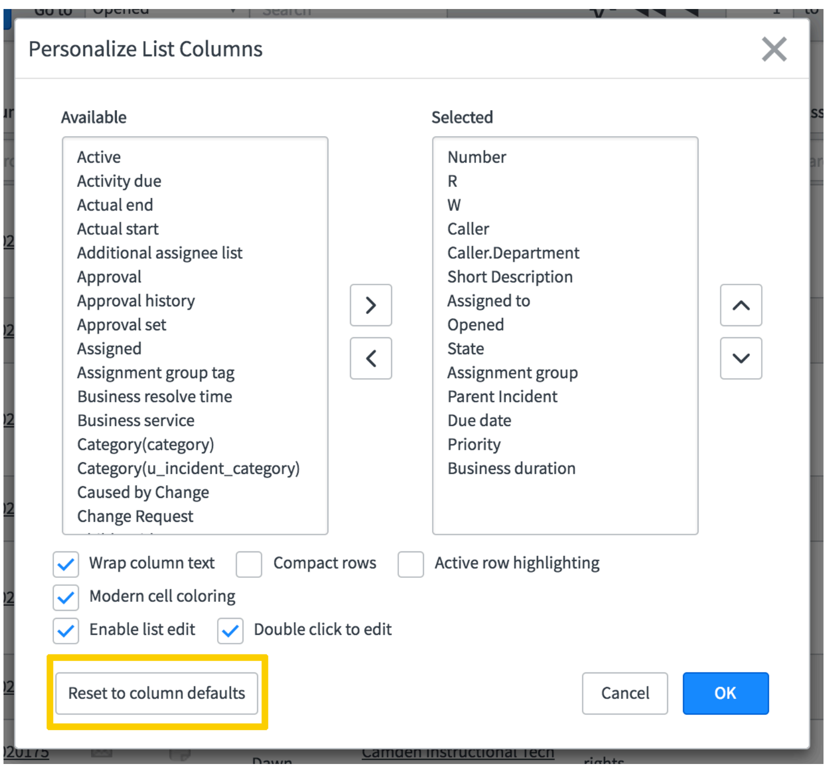


From here, you can add or remove columns from your list view.

The **Number** field must always be present and must **ALWAYS** be the first column. If you move or remove this column the list will not display correctly.



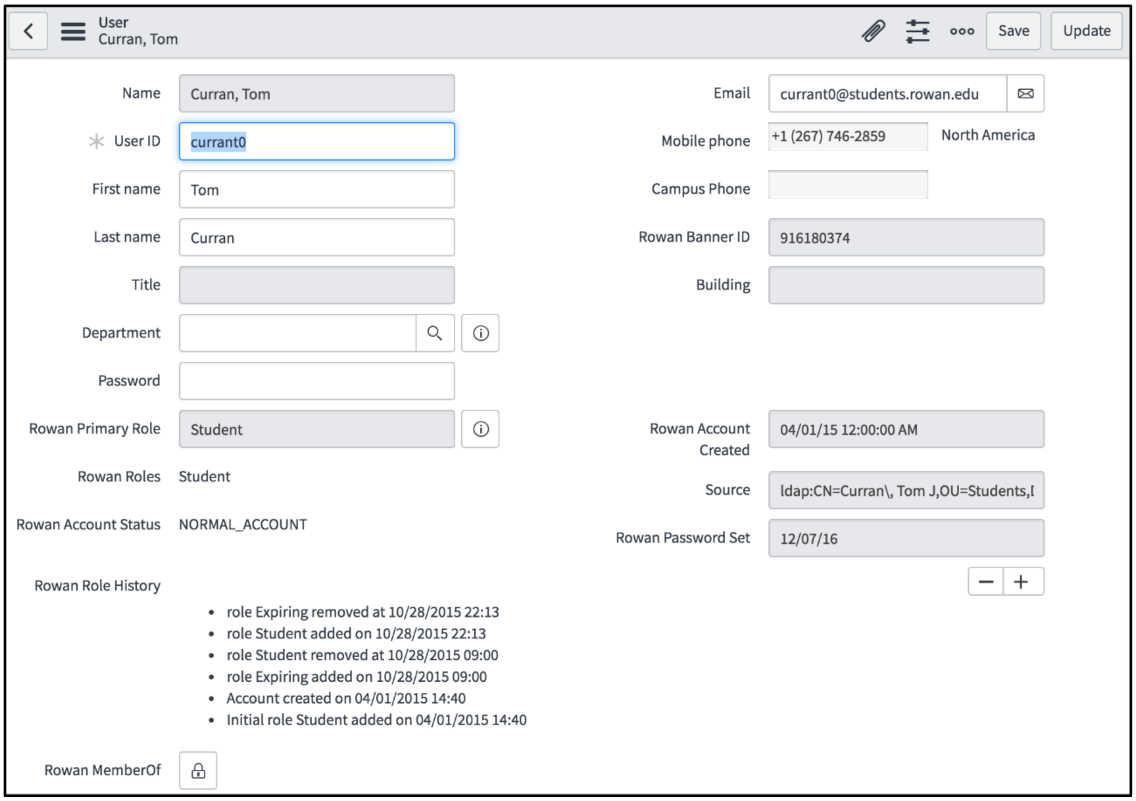
After changing the list view, you can return to original default view by using the gear and selecting the "**Reset to column defaults**" box and clicking "**OK.**"



Hyperlinked Fields

Within a list, underlined (hyperlinked) fields represent a reference to a record in another table. For example, clicking on a hyperlinked caller name will open that user's record from the user table.

NOTE: You can open the record for any hyperlinked field in a new window or tab by holding down the "Control" key while clicking it and then selecting "Open link in..."



Form Icons and Indicators

Within most forms, you may see some of the following icons and indicators:

 **Magnifying Glass:** Some fields have a magnifying glass icon next to them indicating that they are a reference field. Reference fields can be filled in by typing text in the field, which will then attempt to auto-complete your entry or clicking on the magnifying glass icon and searching for the desired item.

 **Read-Only:** When a field, such as Rowan Banner ID, cannot be edited the field will appear with a gray background.

 **Tombstone:** Hover over this icon to reveal additional information about the field the icon appears next to. For example, once the "Requested by" field is filled in, hovering over the tombstone will show you that user's record in a pop-up window. Clicking the tombstone will leave the form and take you to that user's record in the user table.

* **Red Asterisk:** Designates a required field. You will not be able to submit the form until an accepted value is entered.

Invalid entry: When a field's background color turns red it indicates that the field has an invalid value entered and cannot be saved until the value is corrected.

Calls

The "**Calls**" module is used to quickly capture basic information from a Caller (customer) while on the phone. After the information has been gathered, the technician can decide whether to classify that call as an incident or a request.

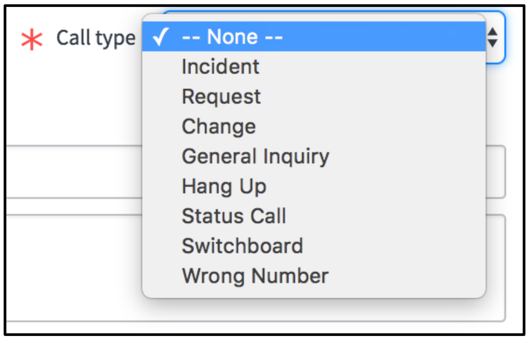
- **Incident:** An unplanned interruption to an IRT Service or a reduction in the quality of an IRT Service. For example: if a user's email client stops working. Most calls will be classified as incidents when we go live.
- **Service Request:** A request submitted by a user for some type of service, software, or hardware. Service requests generally refer to something the user wants and/or needs but does not already have, such as a printer or laptop. Other than hardware and telephone related requests, there are currently no request items available in our Service Catalog. We will be adding more request items in future phases of ServiceNow.

As the Service Catalog grows, the use of the Calls module will become more relevant, especially for the Support Center.

Call Types

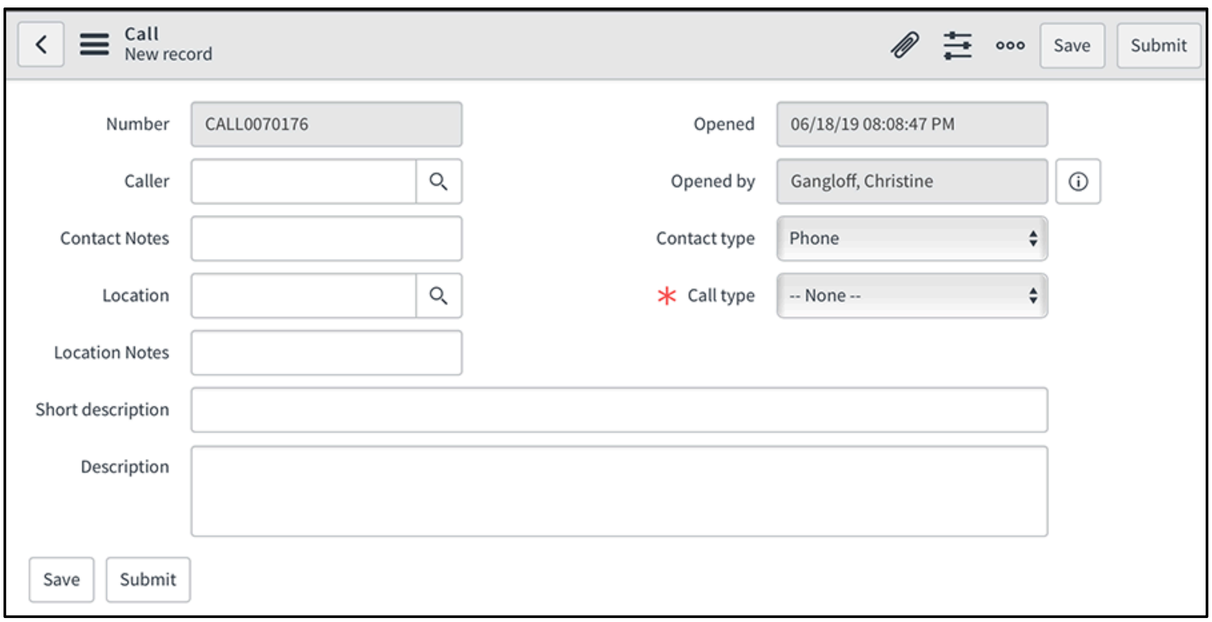
Technicians can use the **Call** module to:

- Create a new call to record switchboard, hang up, wrong number, status update and general inquiry calls.
- Transfer a call to an incident, service request or change.



Creating a New Call: Incident

Click the "**New Call**" module within the **Calls** application. You will see the following form:

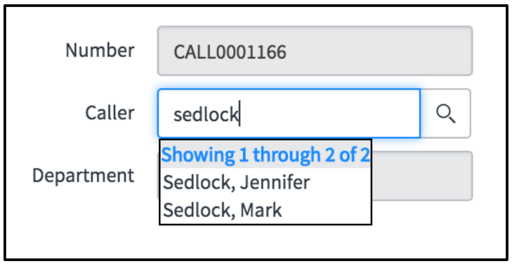


Caller: ServiceNow term for user/customer.

The **magnifying glass icon**  next to the Caller field indicates that it is a searchable reference field.

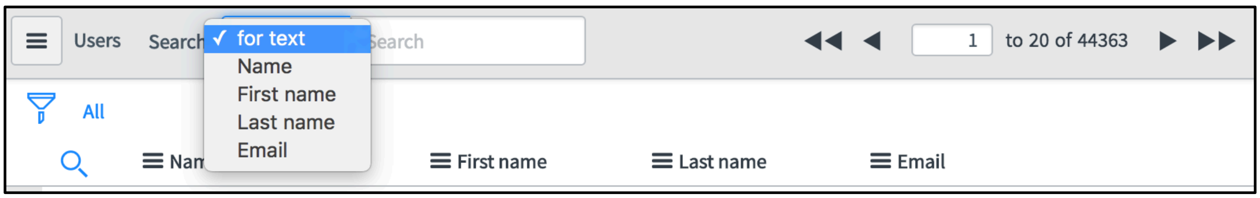
If the caller is Rowan faculty, staff, student or affiliate, you can start typing text in the **Caller** field, which will then attempt to auto-complete your entry and help you find the desired user.

*For callers who are not part of the University community, such as the parent of a student, you can create a call for a **Guest** user*. **Please see the Guest User section on page 42.**

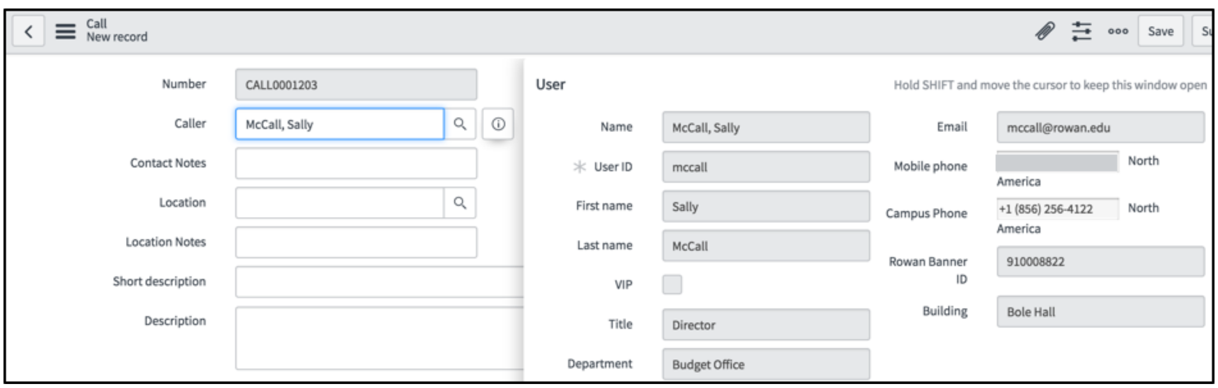


Another option is to click the magnifying glass icon to open a search dialog window.

Change the search option to "**for text**" to get the broadest search results. This will search all Rowan University students, faculty, staff and affiliates.



You can then view and verify the Caller's information by hovering over the Tombstone icon 



If some of the information is incorrect, they will need to do the following:

- **Department:** The user will need to contact the Payroll office to correct their Department.
- **Campus Phone**: The user will need to log into Banner Self Service to fix their phone number.

Additional Call form fields:

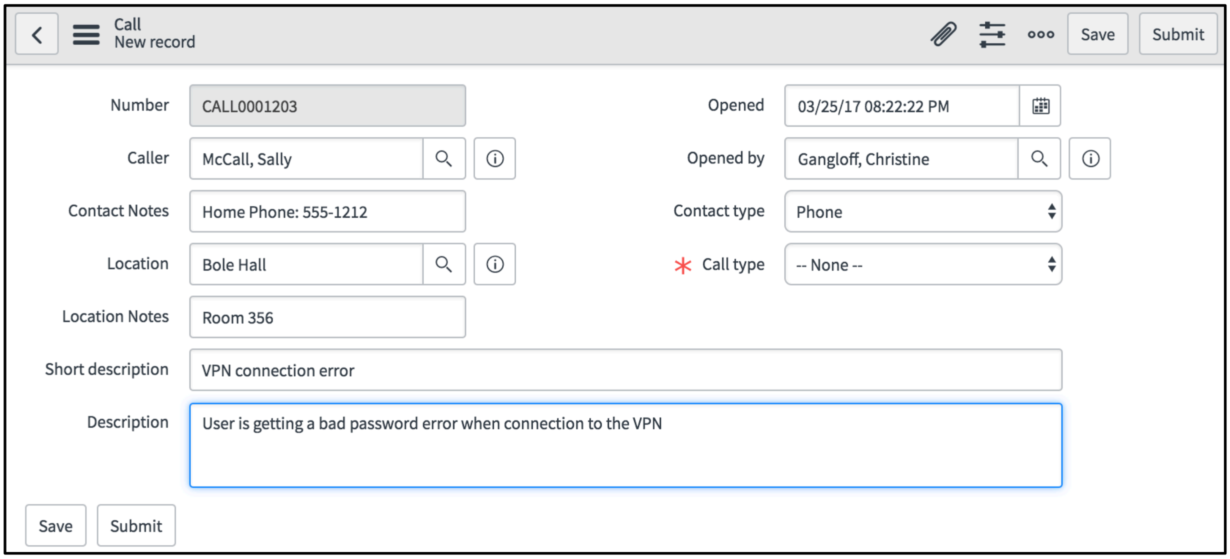
Contact Notes: Add additional contact information, like an alternative email address or phone number, in the **Contact Notes** field.

Location: Add a location for the Caller in the **Location** field. You can start typing text in the location field, which will then attempt to auto-complete your entry.

Location Notes: Add additional location information in the **Location Notes** field.

Fill in a **Short Description** (formerly "Subject" in ServiceDesk) and enter as much detail as possible in the **Description** field.

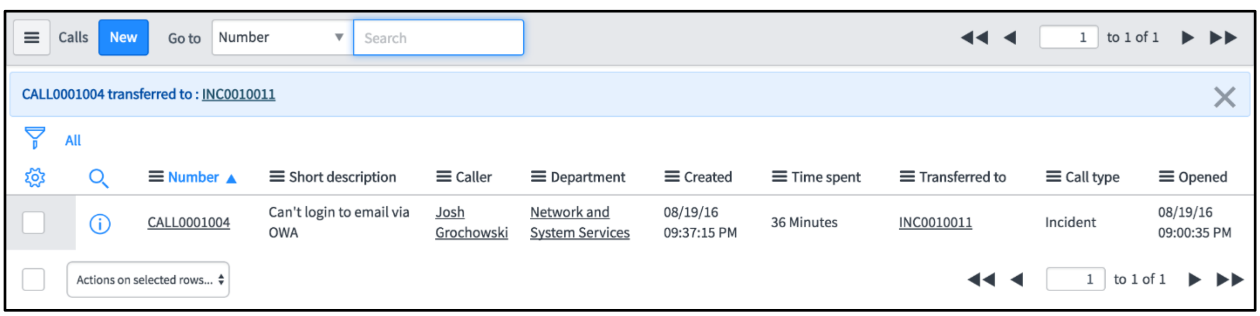
TIP: *You can search the Knowledge base from a button on the incident form. It uses the short description for its search terms. When entering the short description, make sure to use a concise selection of key words that reflect the symptoms of the incident.*



Once the **New Call** form is filled in with the information of a Rowan user or Guest, choose the **Call Type** from the drop-down menu based on what the caller is requesting.

Most calls at this point will be categorized as "**Incidents**."

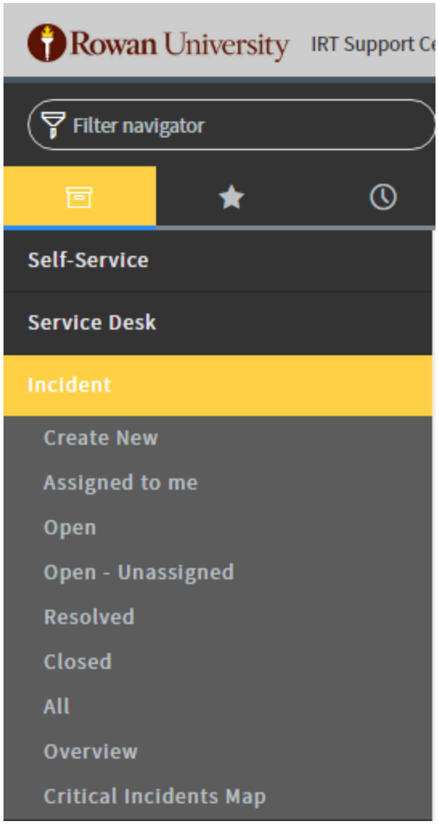
Once the form is completely filled out, click "**Submit.**" The call and all of its information will then be transferred to an incident and you will see the following confirmation screen:



You can then click the incident number in the blue highlighted box (**CALL0001004 transferred to : INC0010011**) to continue processing it or assign the incident to another group.

Incident Management

The Incident Application



The Incident application contains all modules related to incidents.

Create New: Allows you to create a new incident for a customer. When creating a new incident, you must fill in several required fields before the incident becomes active in ServiceNow.

Assigned to me: Incidents that are assigned to you. *This module is also shown on the homepage.*

Open: Active incidents that are currently assigned to a technician.

Open (Unassigned): Active incidents that are unassigned.

Resolved: Incidents that will automatically switch to closed after 72 hours and will then be removed from this view.

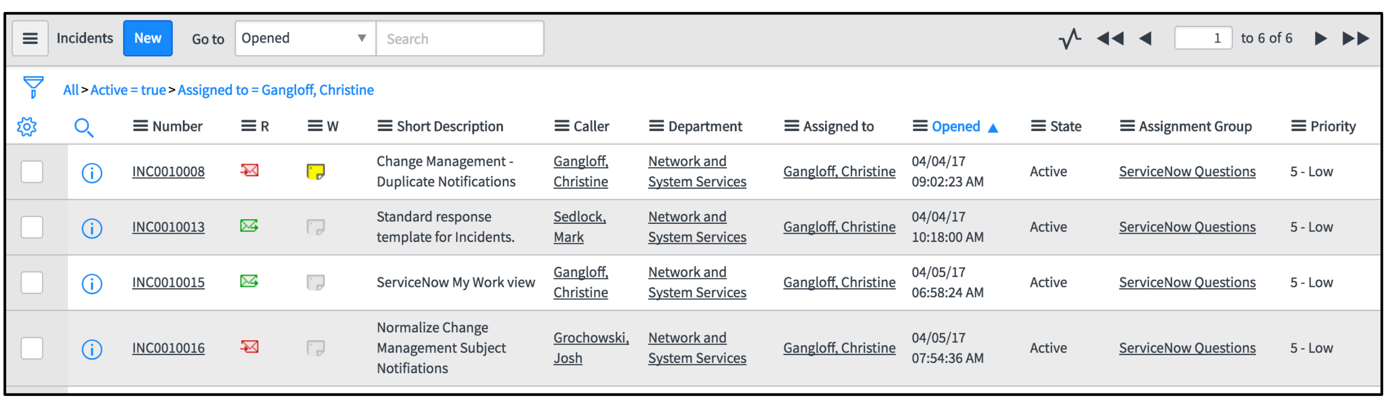
Closed: All incidents that have passed the 72-hour resolution time and didn't receive a customer response.

All: A history of all incidents within ServiceNow, including those in all of the above-mentioned event states.

Overview: A homepage showing various charts and gauges related to incidents.

Incident List View

If you select the "**Assigned to me**" or any other module from the Incident Application you will see the following list view:



Incident Column Headings

The default column headings for the various incident lists are:

Number: Hyperlinked field containing the incident number. Clicking this link will open the incident. The Number field must always be present and must **ALWAYS** be the first column. If you move or remove this column the list will not display correctly.

Reply Status [R] Column: Shows communication updates between the caller and technician.

- This incident has no comments associated with it.
-  The technician who is currently logged in to ServiceNow made the last comment on this incident.
-  A user other than the logged in user made the last comment. This could either by the user who submitted the ticket or another technician.

Work Notes [W] Column: Indicates if a work note has been added to the incident.

- This incident has no Work Note associated with it.
-  This incident has a Work Note associated with it.

Short Description: The short description entered by the Caller or Support Center.
Caller: ServiceNow term for the user/customer who submitted the incident or the incident was submitted on behalf of.
Department: The caller's department based on data available from Banner.
Assigned to: Who the incident is assigned to.
Opened: When the incident was opened.
State: Incident states include:

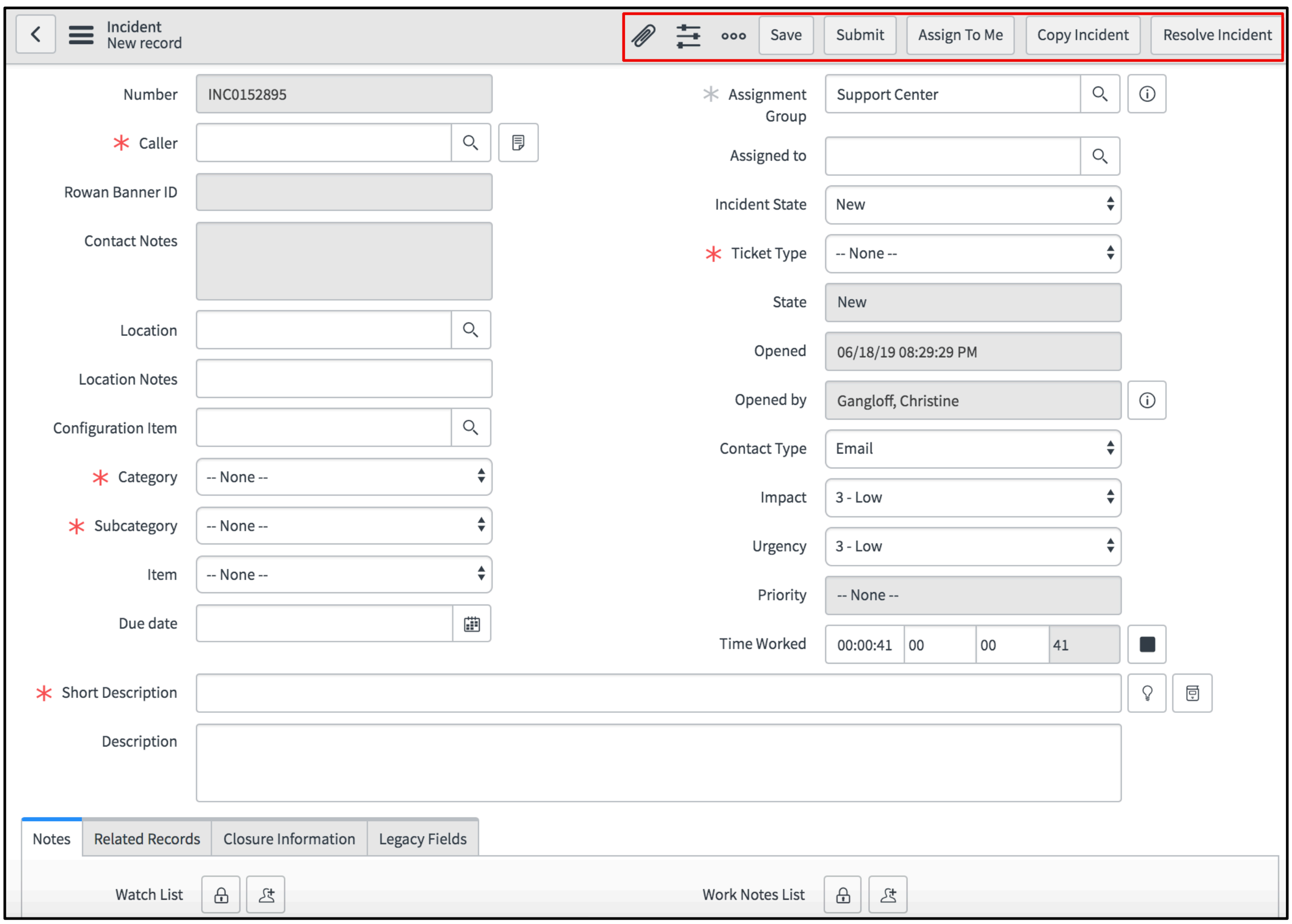
- **New:** Indicates that the support center has received the incident but it has not been assigned to a technician.
- **Active:** The incident has been assigned to a technician.
- **Awaiting User Info:** Indicates that the incident requires some information or response from the user.
- **Awaiting Pickup:** Indicates that something is ready and waiting for pickup (mainly used by the workshop.)
- **Awaiting Vendor:** Indicates that the incident requires some information or response from a vendor. Choosing this will insert a new field to choose the appropriate vendor.
- **Resolved:** The technician has confirmed that the incident is resolved and that the user's service has been restored.
- **Closed:** The incident is resolved and that no further actions can be taken.

Assignment Group: The technician group the incident has been assigned to.
Priority: Determined by the incident's impact and urgency settings.

The Incident Form

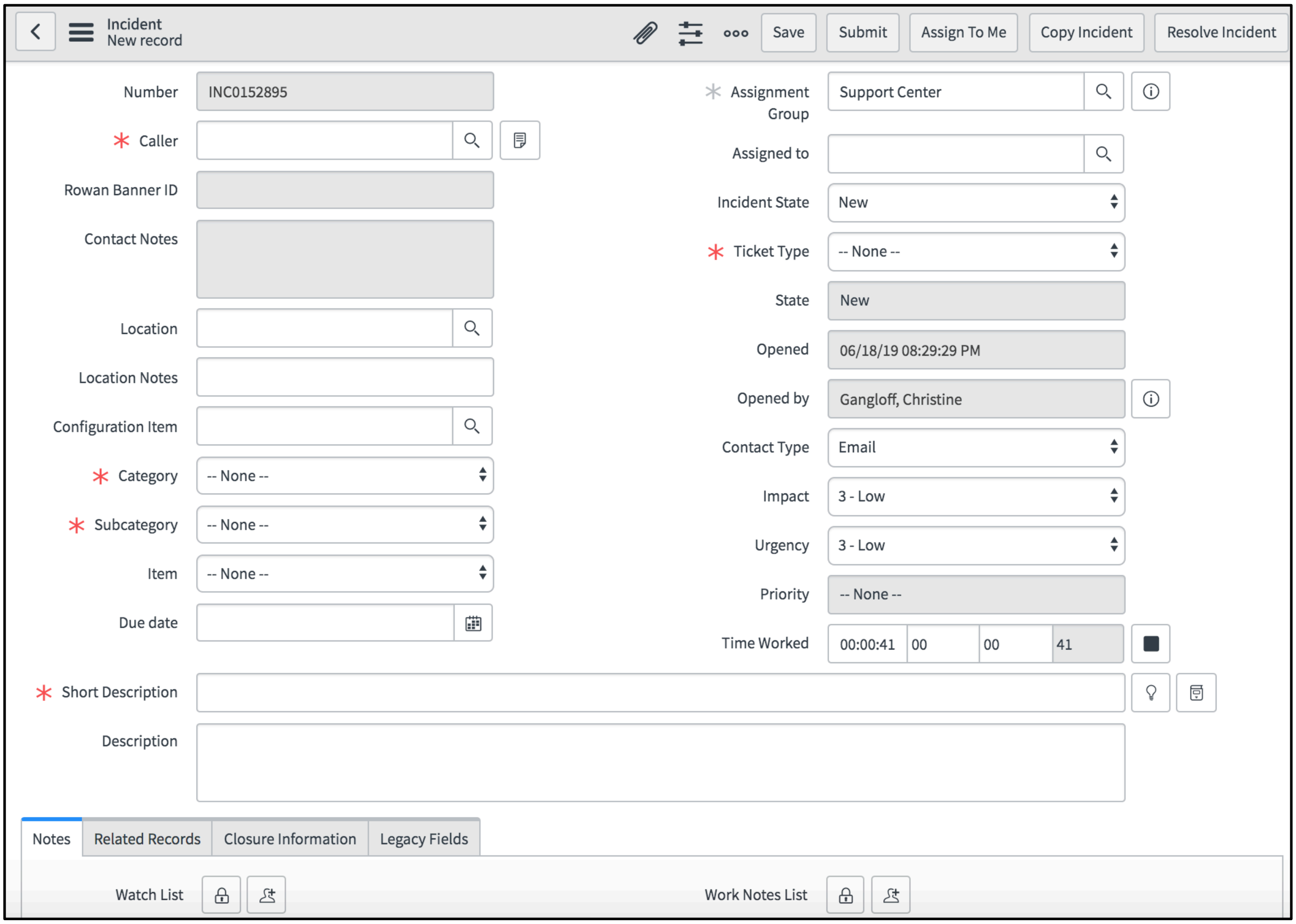
Upon opening an incident, you will see a row of buttons on the top right of the incident form. These buttons will change depending upon the **state** of the incident and your role within ServiceNow. These buttons have the following functions:

- **Attach:** Attach is represented by a small paper clip icon. This button will open a dialog window allowing you to attach a document related to the incident.
- **Personalize Form:** Personalize Form is represented by a slider icon. This button opens up a window allowing you to check or uncheck the fields you would like to see on the form. *Please refrain from using this at it could hide fields on the form that you may need.*
- **Save:** Saves your changes and stays on the incident form.
- **Submit:** Saves your changes and submits the new incident for work. Submitting will take you back to a list of all incidents.
- **Assign To Me:** Assigns the incident to you and sets your Assignment Group. If you are a member of multiple assignment groups you can set your primary assignment group by following the instructions found in KB0012557 in the Internal Knowledge Base.
- **Copy Incident:** This can be used to copy (split) an incident that is created via email and contains two or more issues that need to be assigned to different groups/people.
- **Resolve Incident:** Only available on incidents that are not already in a "Resolved" state. Saves your changes and marks the incident as resolved, indicating that the incident has achieved resolution. Resolving will take you back to a list of all incidents.



Create a New Incident

To create an incident that is not generated by a phone call, click the "**Create New**" module within the **Incidents** application and you will be presented with the new incident form:



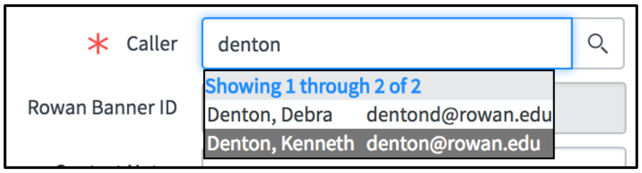
While you are creating an incident, you will notice that the **Time worked** timer will be running and counting your time spent while creating the incident. You can find more information about **Time worked on page 45.**

Caller: ServiceNow term for user/customer. *Formerly "Requester" in ServiceDesk.*

The magnifying glass icon next to the **Caller** field indicates that it is a searchable reference field.

You can start typing text in the **Caller** field, which will then attempt to auto-complete your entry and help you find the desired user.

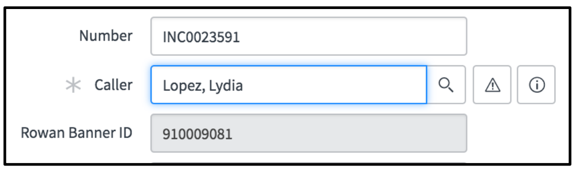
*For callers that are not part of the University community, you can also create an incident for a **Guest** user as detailed in the next section*.



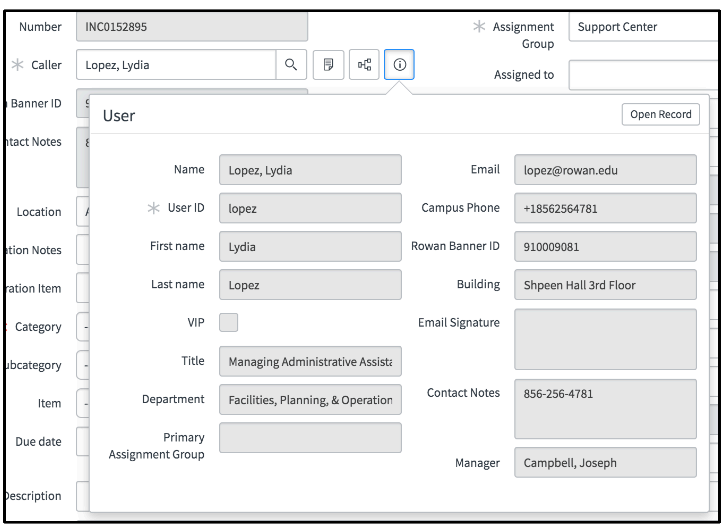
Another option is to click the **magnifying glass icon** to open a search dialog window.

Change the search option to "**for text**" to get the broadest search results. This will search all Rowan University students, faculty, staff and affiliates.

Once the caller field is filled in, the **Rowan Banner ID** field will auto-populate for employees, students, affiliates and other members of the University community with entries within Banner.



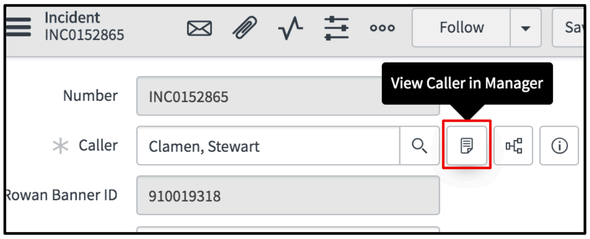
You can then click the Tombstone icon to see the user's information. This information is populated from Banner and Active Directory.



Verify that the Caller's information is correct. If some of the information is incorrect, they will need to do the following:

- **Department:** The user can set their Preferred Position in RIMS.
- **Campus Phone**: The user will need to log into Banner Self Service to fix their phone number.

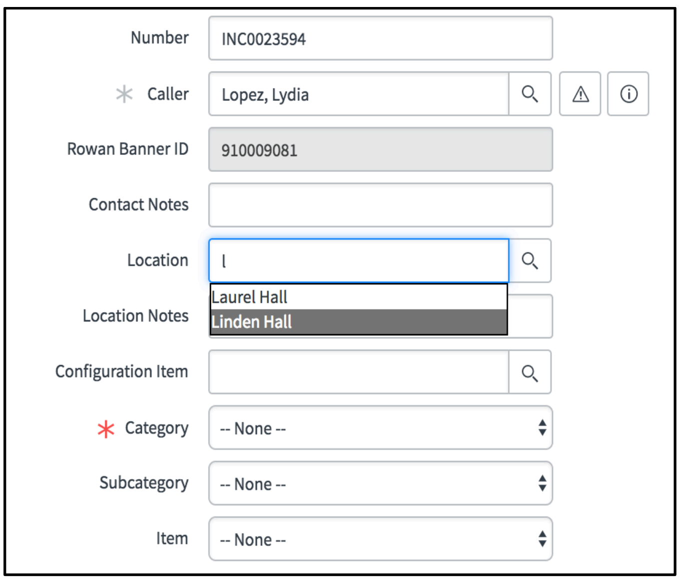
For more information about the caller you can click the **Page icon** next to the caller field to open the Manager page.



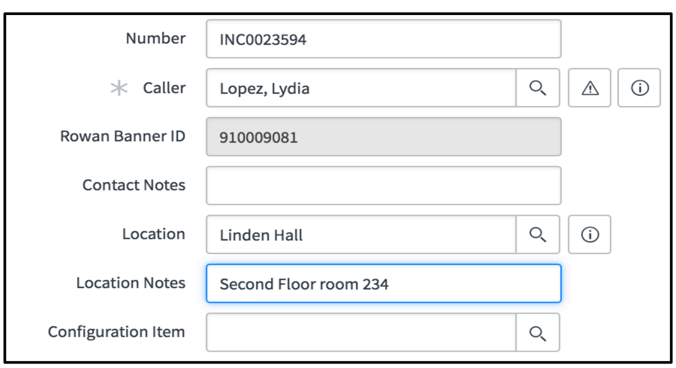
Back on the incident form, you can add additional contact information, such as an alternative email address or phone number, in the **Contact Notes** field.

You can add a location for the Caller in the **Location** field. You can start typing text in the location field, which will then attempt to auto-complete your entry.

Another option is to click the **magnifying glass icon** to open a search dialog window.



Once the **Location** field is filled in, you can add additional location information in the **Location Notes** field.



Next, choose a **Category**, **Subcategory** and item (if applicable) and choose an **Impact** and **Urgency** level.

An incident's priority is determined by its impact on users and its urgency. Urgency is how quickly a resolution is required. Impact is the measure of damage the incident is causing.

Impact: *The key factor in measuring impact is the* ***impact the incident has on the University****. Each incident should be reviewed on a case-by-case basis with appropriate impact assessment based on the following criteria:*

High Impact

- *Whole University affected*
- *Department or multiple Departments affected*
- *More than 10 users affected*
- *Critical University service interrupted*
- *System-wide outage to Email, Internet access etc.*

Medium Impact

- *Small group of two to 10 users affected*
- *Non-critical University services interrupted (Department printer, for example)*

Low Impact

- *One user affected (other than a VIP, including Vice-Presidents or the President)*

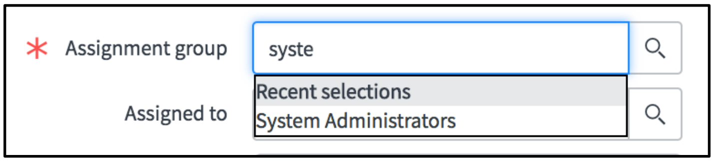
Urgency: *The extent to which the incident's resolution needs attention.*

- ***High Urgency****: Any incident that is important and requires immediate action as it is business critical/urgent.*
- ***Medium Urgency****: Any incident that is important but does not require immediate action, such as moderate loss of functionality or performance resulting in minor performance degradation. The incident does not impact production.*
- ***Low Urgency****: Any incident that results in minimal or no interruptions to normal operations, such as minor loss of functionality, any new service help or how-to questions.*

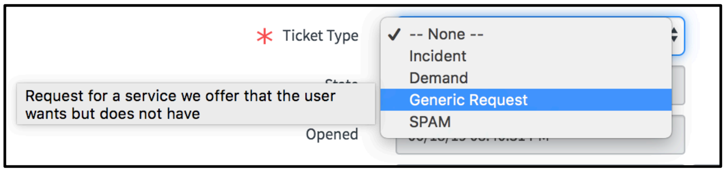
Fill in a **Short Description** (formerly "Subject" in ServiceDesk) and enter as much detail as possible in the **Description** box.

> **TIP:** *You can search the Knowledge base from a button on the incident form that is located next to the short description field. It uses the short description for its search terms. When entering the short description, make sure to use a concise selection of key words that reflect the symptoms of the incident. For example, use* ***"Email login error"*** *instead of* ***"User is having trouble with their email"***

Choose an **Assignment Group** by typing the name of the group in the field, which will then attempt to auto-complete your entry with the desired group. Once the field is filled in, click "**Save**" at the top or bottom of the form.



For the mandatory **Ticket Type** field choose from Incident, Demand, Generic Request and SPAM. Hovering over a choice will give you a definition of that type.



Full descriptions of the Ticket Type options:

Incident: An incident is an unplanned interruption to a service or a reduction in the quality of a service. “Incident” should be selected when something is broken or not working as it should. Examples may include a broken computer, an error when accessing Banner, Outlook not functioning correctly, etc.

Demand: A demand is a request for a new service or an upgrade / modification to an existing service. Demands will typically result in Projects or Requests for Change. “Demand” should be selected when a user is requesting a new feature be added to an existing system, like adding a new code in Banner, or a request for network upgrades in support of a new building or other construction project.

Generic Request: Requests generally refer to something we offer that a user wants and/or needs but does not already have. “Generic Request” should be selected for requests that aren't already available in the Service Catalog (which currently include Exchange shared mailboxes, quota increases, Confluence spaces, etc.). Generic Requests might be a request for information or advice, access to a service we provide, forgotten passwords / password resets, access to a shared network drive, a new virtual server, or an inquiry regarding a specific service.

SPAM: To only be used for spam email that comes into ServiceNow and creates a ticket. Assign these tickets to the System Administrators group and that email address will be blocked from creating further tickets. This ticket type **IS NOT** to be used for customers reporting SPAM. Those should be set as a Generic Request.

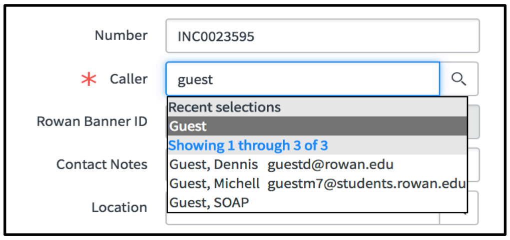
You can then **Save** or **Submit** the incident. Saving the incident will save and stay on the form, clicking Submit will save the incident and leave the form.

NOTE: In most cases, you should not assign an incident directly to technician in a group other than your own. In many cases, you may not know if a specific technician is out sick or on vacation.

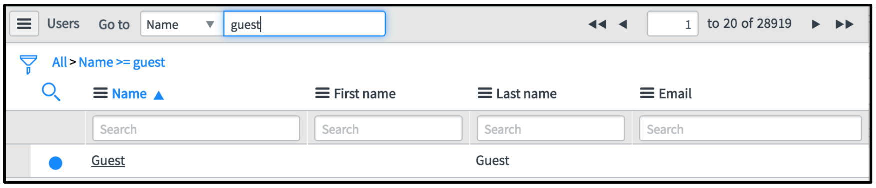
Guest Users

For callers that are not part of the University community, such as the parent of a student, you can create a call or incident for a **Guest** user.

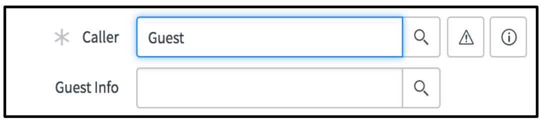
To do this, begin typing the word “guest” into the **Caller** field and choose the user named **Guest**.



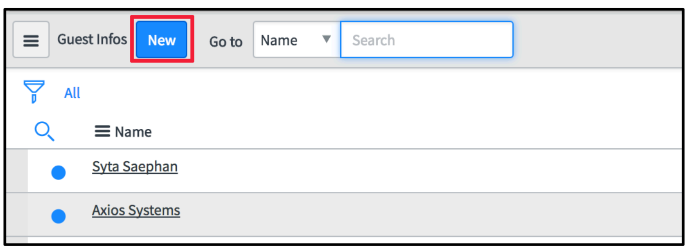
Another way would be to click the **magnifying glass icon** next to the Caller field and search for "**Guest.**"



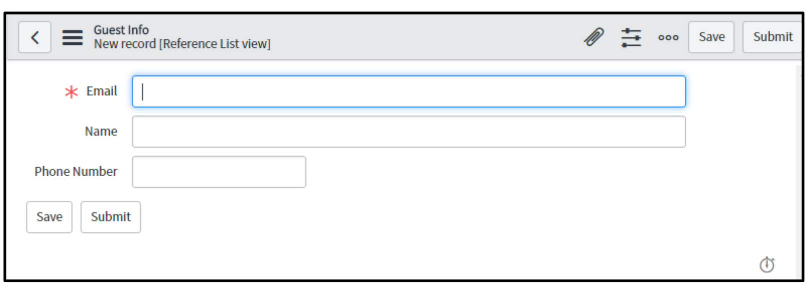
Select the **Guest** user and you will see the **Group Info** field added to the Call or incident form.



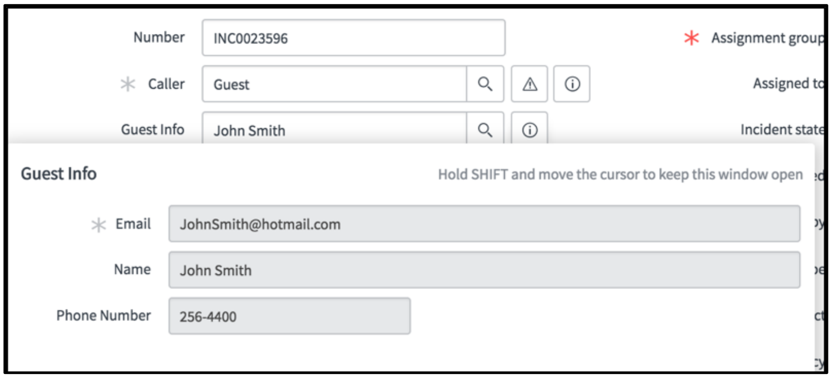
Click the magnifying glass icon next to the **Guest Info** field and click "**New**" to add the new guest caller's information.



Enter the caller's **Email Address, Name** and **Phone Number** and then click **Submit.**



This will add the Guest Caller's name to the **Guest info** field and make the rest of their information available to view when hovering over the **Tombstone** icon 



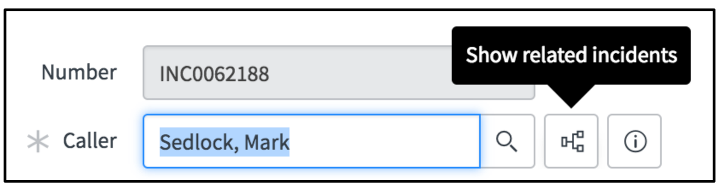
Fill out the remaining details on the call or incident form as detailed in the previous sections.

If a user has submitted an incident via email who doesn't have a Rowan University user account, that incident will show up with the Caller as "**Guest**" and the name from their email will show up in the "**Guest Info** field.

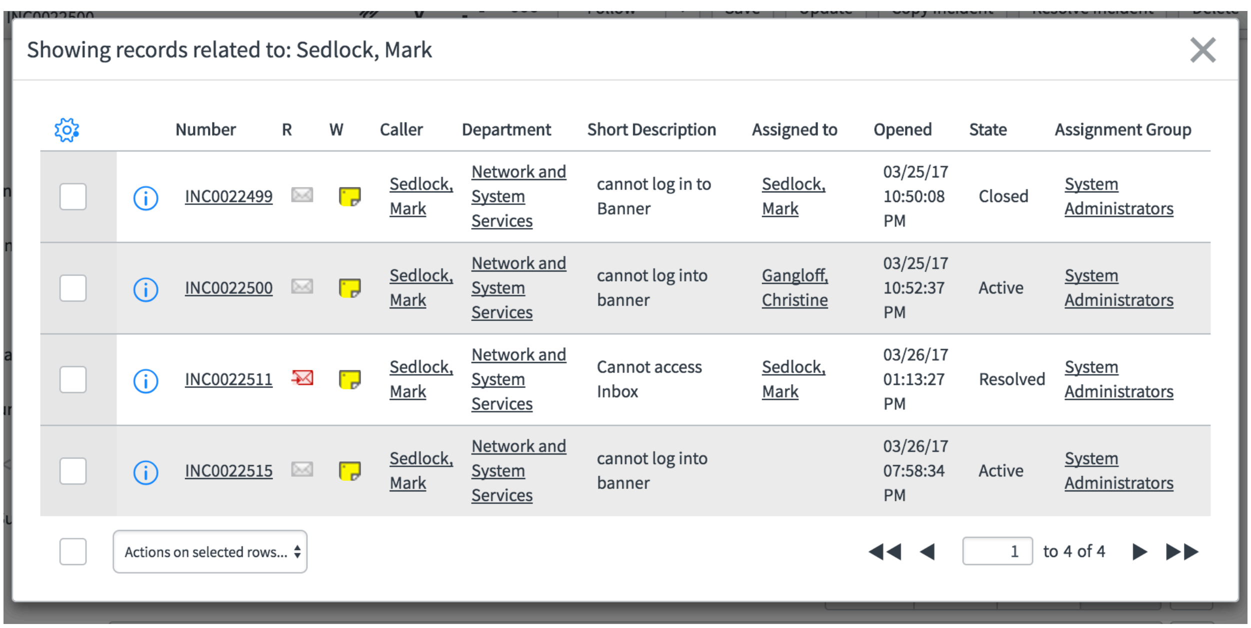
Related Incidents

You can see a caller's previous ServiceNow incidents as well as their old ServiceDesk tickets.

To see a caller's previous **ServiceNow** incidents, click the "Show related incidents" icon to the right of the Caller field on the incident form.



This will pop-up a window showing that user's previously submitted incidents.

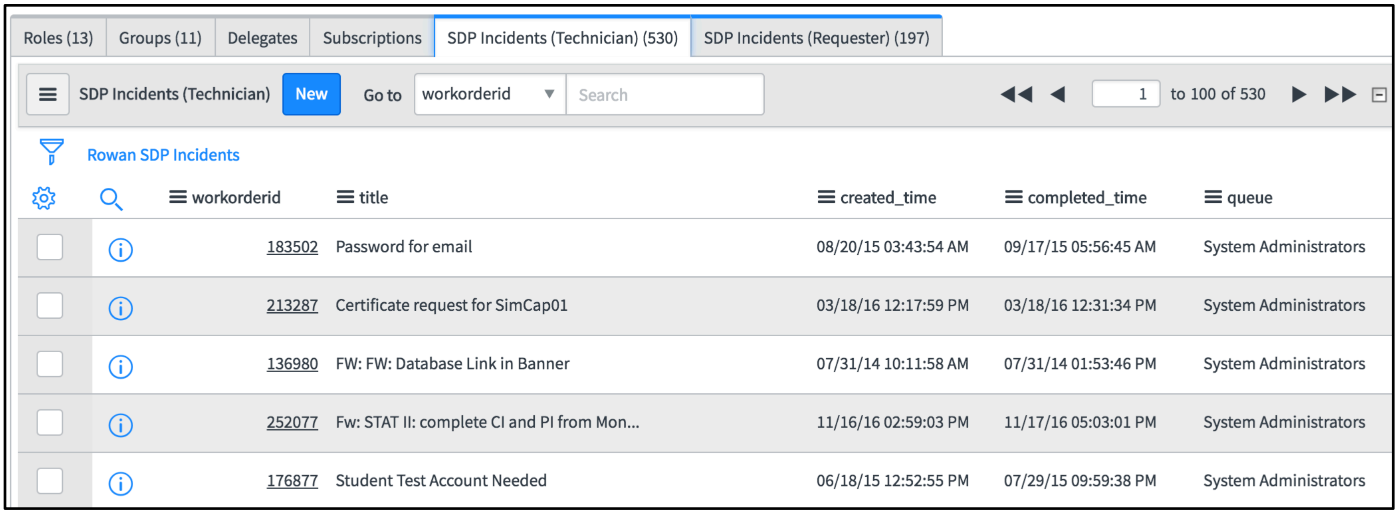

Showing records related to: Sedlock, Mark

Number	R	W	Caller	Department	Short Description	Assigned to	Opened	State	Assignment Group
INC0022499			Sedlock, Mark	Network and System Services	cannot log in to Banner	Sedlock, Mark	03/25/17 10:50:08 PM	Closed	System Administrators
INC0022500			Sedlock, Mark	Network and System Services	cannot log into banner	Gangloff, Christine	03/25/17 10:52:37 PM	Active	System Administrators
INC0022511			Sedlock, Mark	Network and System Services	Cannot access Inbox	Sedlock, Mark	03/26/17 01:13:27 PM	Resolved	System Administrators
INC0022515			Sedlock, Mark	Network and System Services	cannot log into banner		03/26/17 07:58:34 PM	Active	System Administrators

Actions on selected rows... 1 to 4 of 4

To view an archive of a user's ServiceDesk tickets, **click the Tombstone icon**  next to the Caller field to open their user record. Scroll to the bottom of user's record and select either "SDP Incidents (Technician)" to view tickets that were assigned to them or "SDP Incidents (Requester)" to view tickets they were the requester on.

From here, you can search for a user's old ticket and see all of the history and communication attached to it. This may be helpful if a user says "*The same issue happened six months ago*."



Linking Incidents (Parent-Child)

You can link two or more incidents by using the Parent-Child relationship function. This replaces the "Merge" functionality that was used in Service Desk.

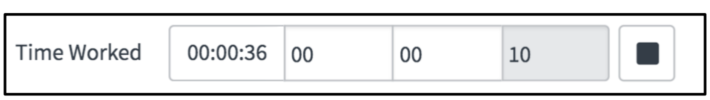
For example, if a user sends an update for an incident in a new email it won't add the comment to the existing incident if the subject line isn't a reply and doesn't contain the incident number for the previously open ticket. In this case, you will want to link this new incident to preexisting incident.

Please see **KB0012239** in the ServiceNow knowledge base for more information.
https://support.rowan.edu/kb_view.do?sysparm_article=KB0012239

Time Worked

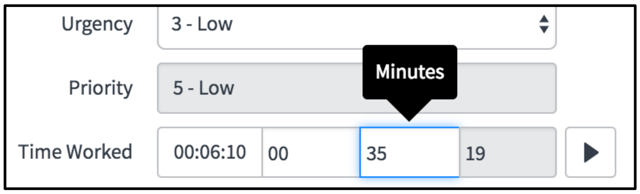
Once an incident has been assigned to you, you will receive an email notification and the incident will show up in the **My Work** and **Assigned to me** list views.

Upon opening the incident to begin processing it, the **Time worked** timer will begin running.



While you are working on the incident, leave the form open so you can get an accurate time count. You can stop and start the timer as needed while working to resolve the incident. If you leave the form, the timer will stop.

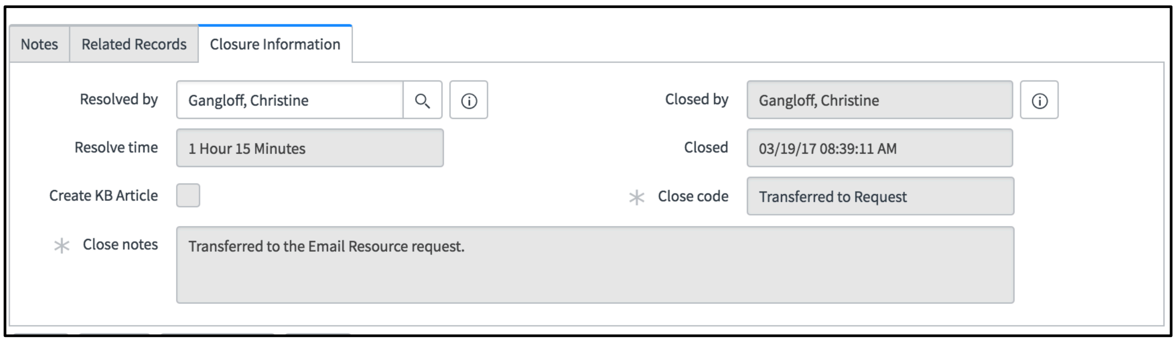
If you are resolving an incident in the field, you can also add your time manually by stopping the timer, clicking in the "Hours" or "Minutes" field, typing in your time spent and then tabbing or clicking away from the field.



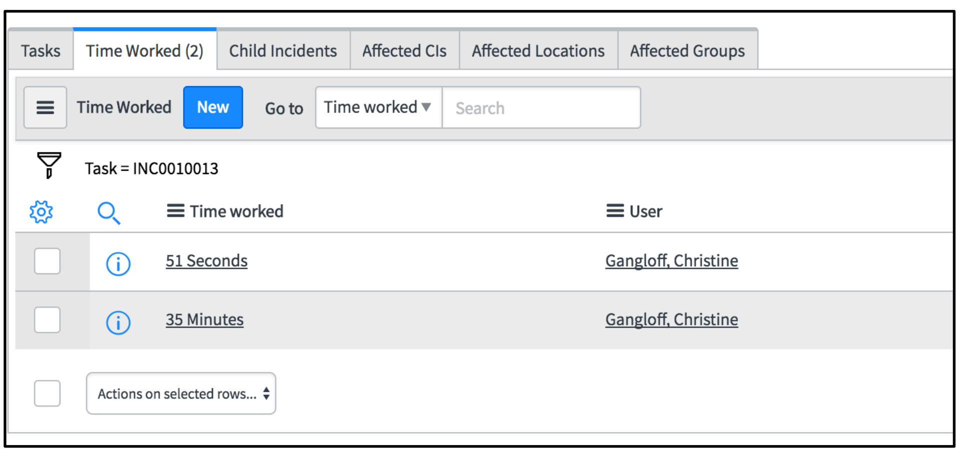
All technicians **must** keep complete time worked details for reporting purposes.

It is recommended that all technicians leave the incident form open while they are working on the issue to automatically keep track of the time.

After the incident is closed or resolved, the total time worked will show up in the **Resolve time** field on the "Closure information" tab at the bottom of the incident form.

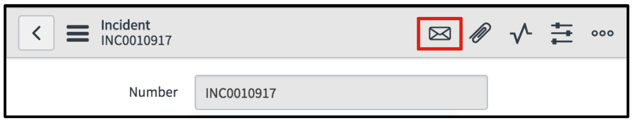


You can also see the time worked sessions and durations for all users who worked on this incident by scrolling to the bottom of the incident form and clicking the "Time Worked" tab.



Messages to the Caller

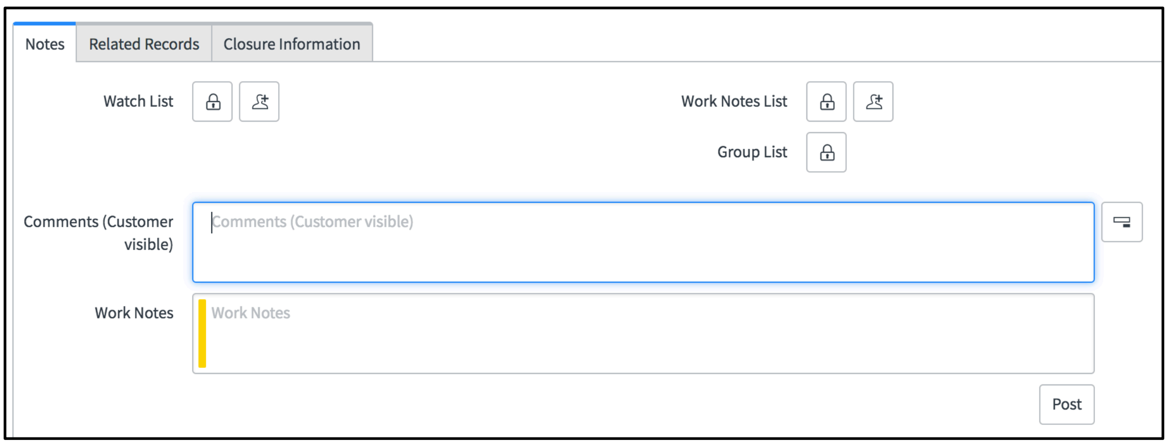
You can email the caller and other users by clicking the “Email” envelope icon in the form header.



For more information on email functionality and sending “Quick Messages” please see the following KB article **KB0012256** in the ServiceNow knowledge base. https://support.rowan.edu/kb_view.do?sysparm_article=KB0012256

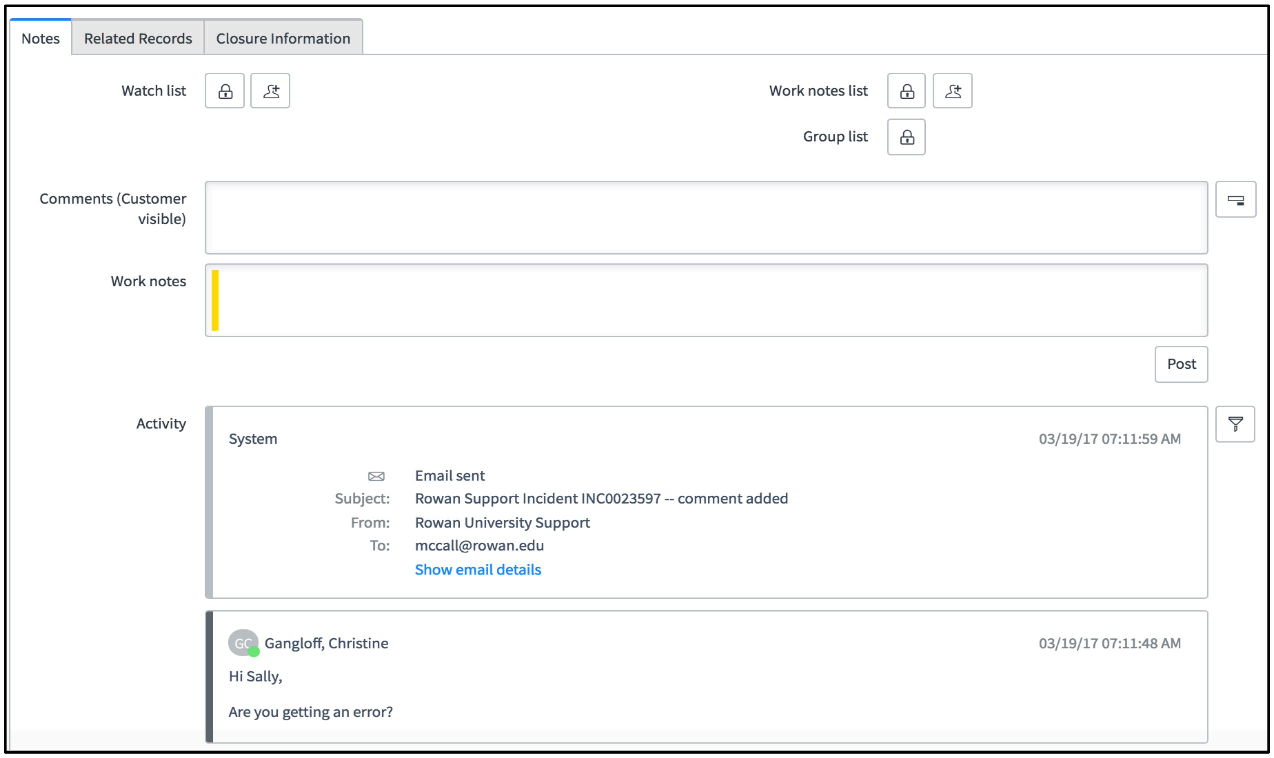
You can also message the caller by scrolling down the incident form to the **Notes** tab (below the main form fields) and entering the information you would like to send them in the "**Comments**" field. Click the **Post** button to email the message.

If the incident was created from an email that had CC’d users, they will be added to the “**Watch List**” and will receive copies of any messages posted from the “Comments” field.



The “Comments” field is text only. Use the email function instead of the Comments field if you need to send the customer a screenshot or document.

Your message and a confirmation that the email was sent will be added to the **Activity log**.

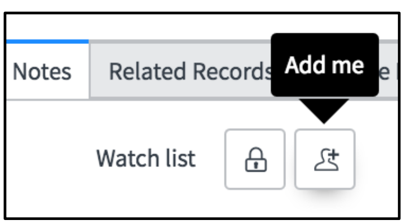


The Watch List

You can add yourself or other users to the **Watch list** of any incident to receive all communications sent to the Caller as part of that incident.

Open the incident you'd like to watch and scroll down to the "Notes" tab below the main form fields. Select **Add me** to add yourself or click the lock icon to add other users. Users in the list will see messages to and from the Caller as well as all posted work notes.

You do not need to add yourself to the watch list on incidents assigned to you. You will automatically receive these communications by default.



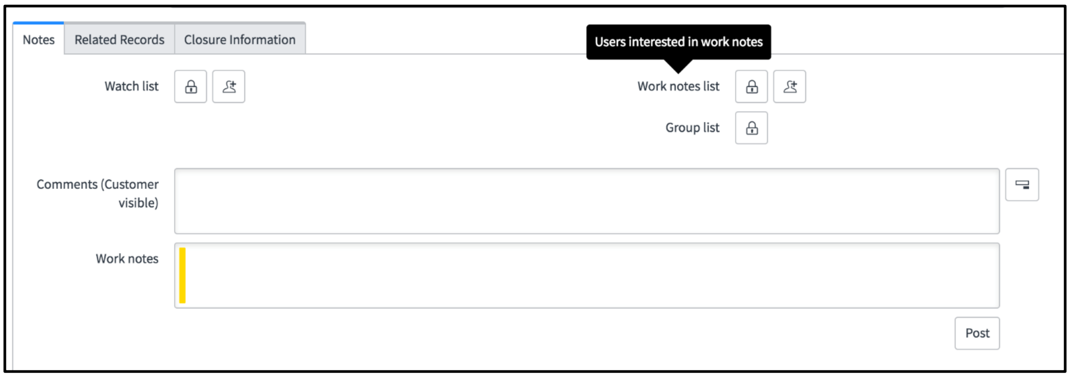
Messages to Technicians

Work Notes

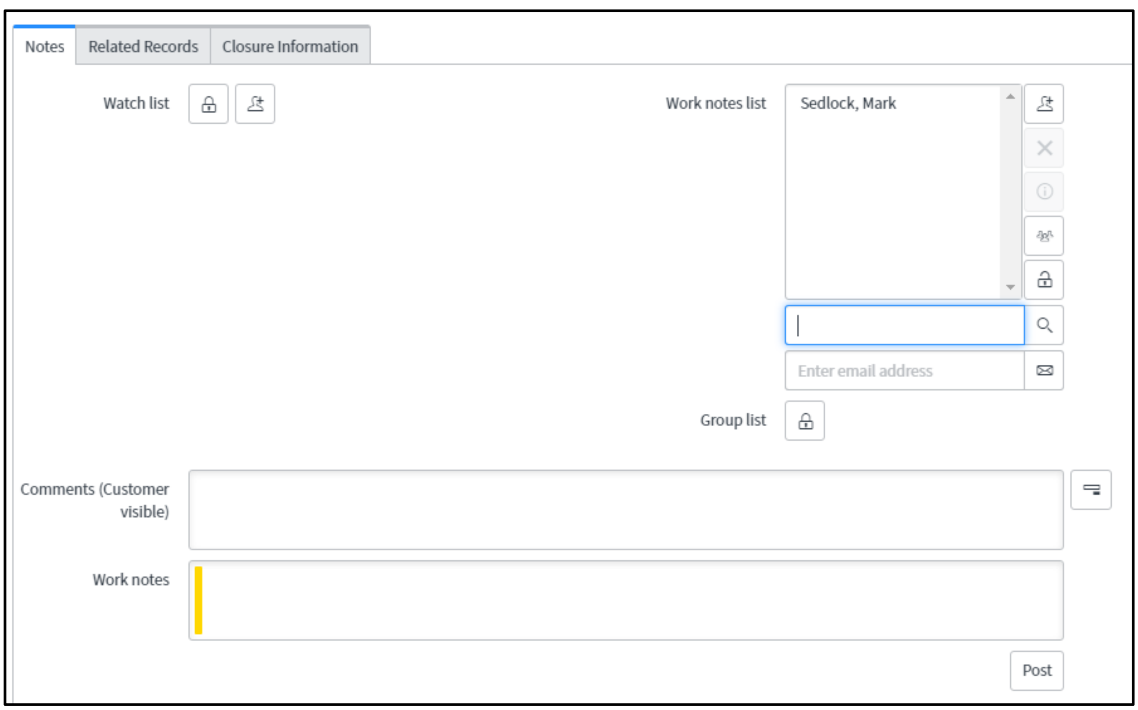
To add a **Work note**, scroll down the incident form and you will see the “Notes” tab that contains an area called **Work notes** with a yellow highlight down the side. Posting work notes will add them to the Activity log to keep track of any information that needs to be logged and email anyone in the **Work notes list.** *(See the next section for details)*

NOTE: Please make sure any internal messages are in the **Work notes** field with the **yellow highlight** down the side before you click **Post**. Take care to not accidentally put a message meant for internal use only in the Comments field. **Any message posted from the Comments field will be sent to the customer (Caller).**

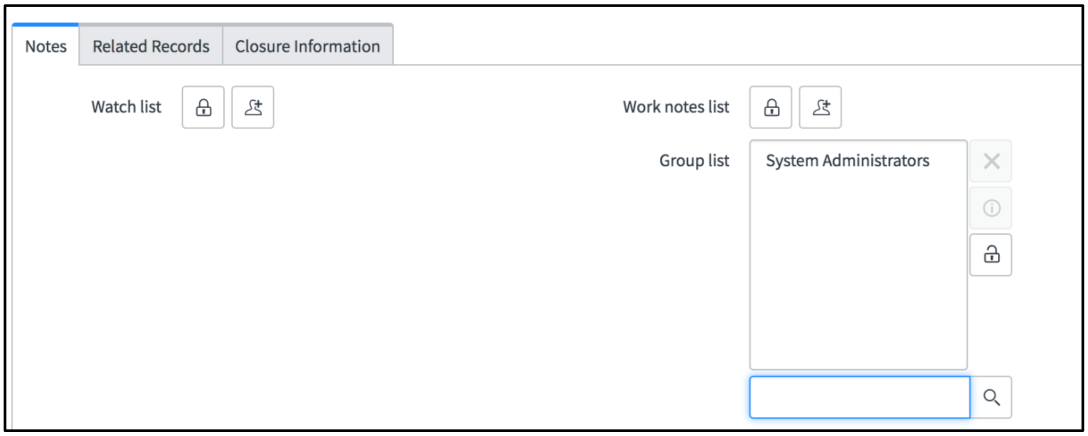
You can email a work note to another technician or user by adding them to the "**Work notes list.**"



Click the **Work notes list** lock icon and search for a technician's name or add any user's email address to the **Enter Email address** field below the search field.



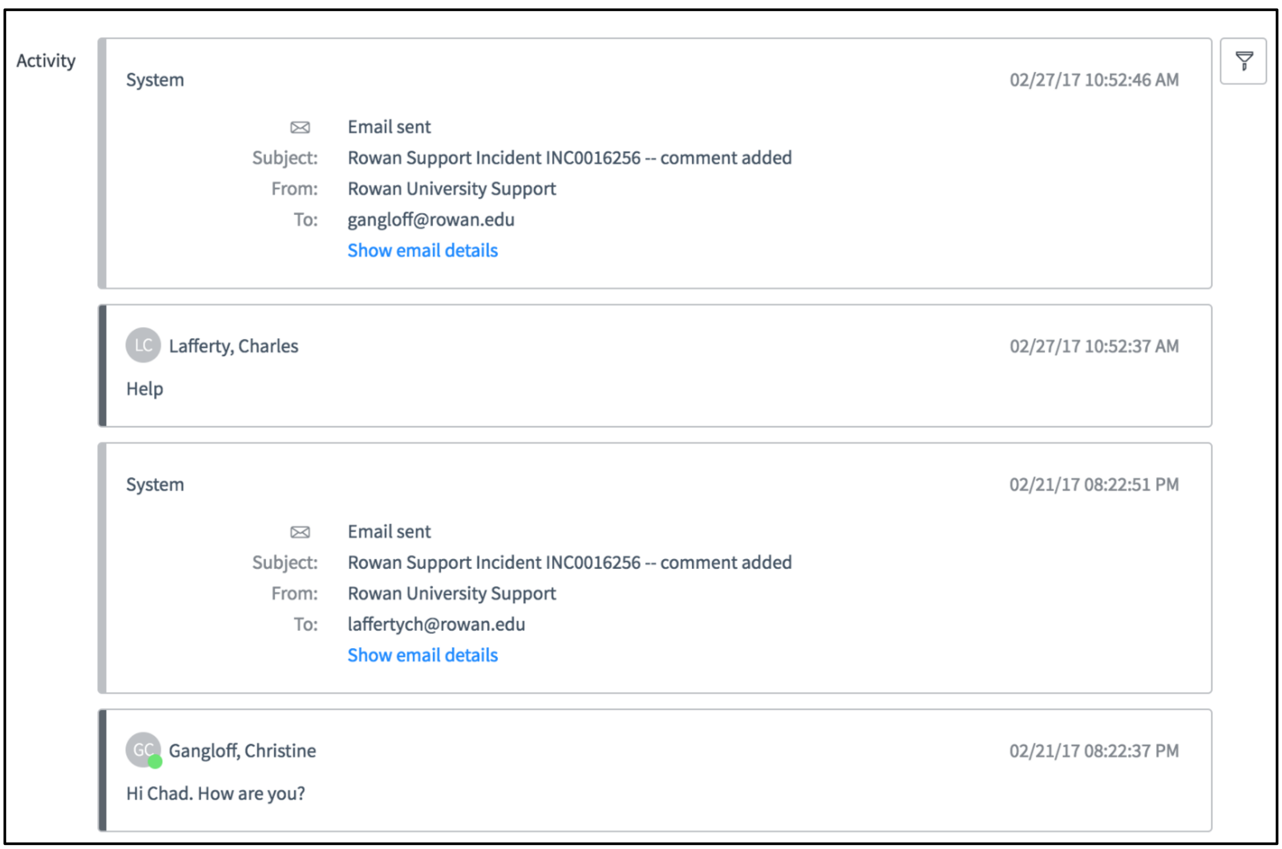
You can also have work notes sent to a Group by clicking the "**Group list**" icon and adding a technician group.



Enter a message into the Work notes box, click **Post** and the message will be sent to the technician, user or group you added. The message will also be added to the Activity Log.

The Activity Log

The Activity Log *(on the Notes tab below the Comments and Work notes fields)* provides an easy way to track items not saved within a field on the form, such as comments to the caller, work notes and a record of all email activity.

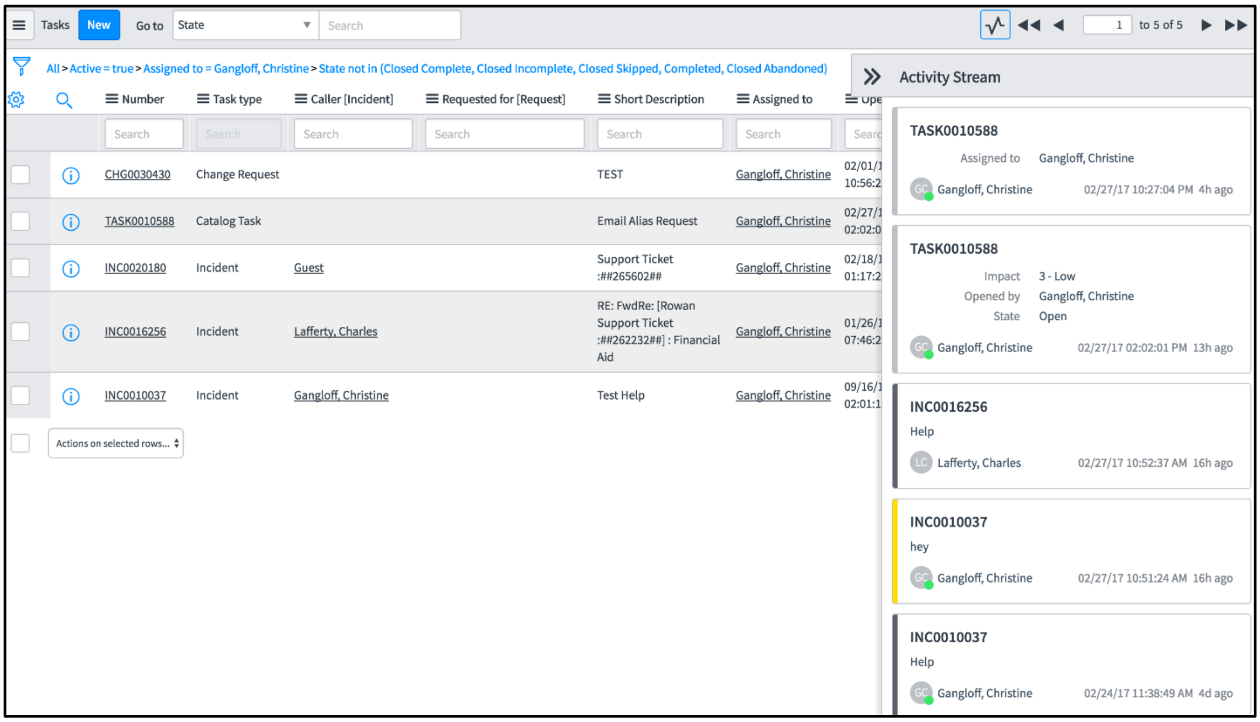


Using the Activity Stream

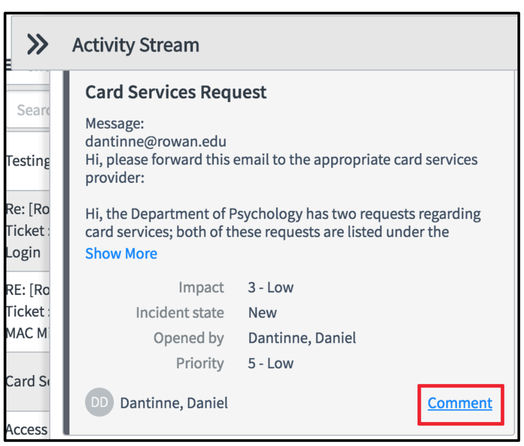
You can use the Activity Stream to see all current updates to the tasks, incidents and changes on any list including My Work and My Groups Work.

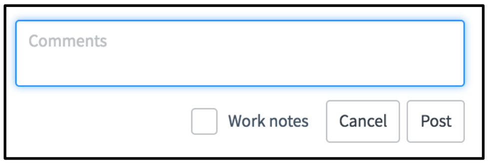
Click the Activity Stream icon  on the top menu bar of your list.

The activity stream information appears in a pop-out window and is the same information that appears in the activity log for a record, including any new comments or work notes. The stream updates automatically.



You can add a comment to any item in the activity stream. When you point to the item with your cursor, a Comment button appears.





PLEASE NOTE: Any comment added here will be **sent to the caller (end user)** unless you check the "**Work Notes**" box, which will save the note to the Activity log and only be viewable by technicians.

You can click an item to open the activity stream just for that record. The record's activity stream lets you open the task record, post additional comments or work notes and preview images. Click the < icon at the top to close that record's individual activity screen.

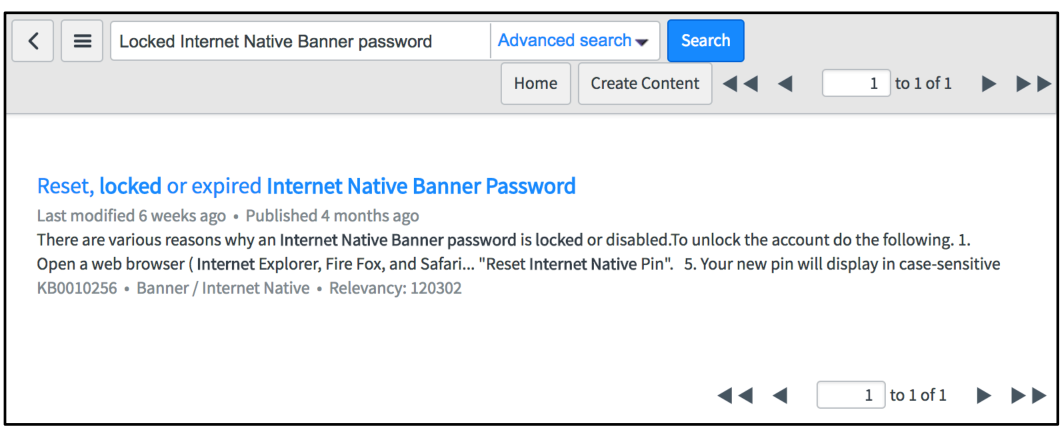
Searching for a Solution

You can search the knowledge base for a solution from the incident form.

Make sure the Short Description field has a concise selection of key words that reflect the symptoms of the incident.

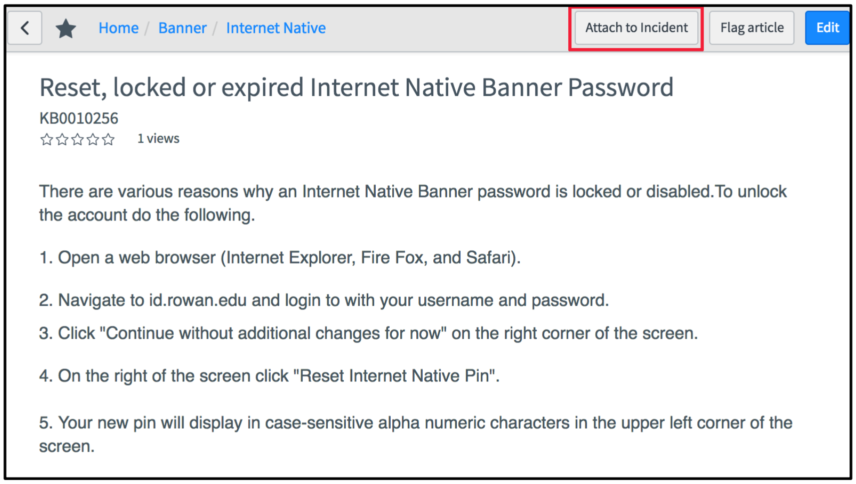
Click the **Search Knowledge** button to the right of the **Short Description** field.

This will open the Knowledge base and automatically search the keywords from the **Short Description** field. You can choose one of the articles it finds or change the search terms at the top of the window to search again.

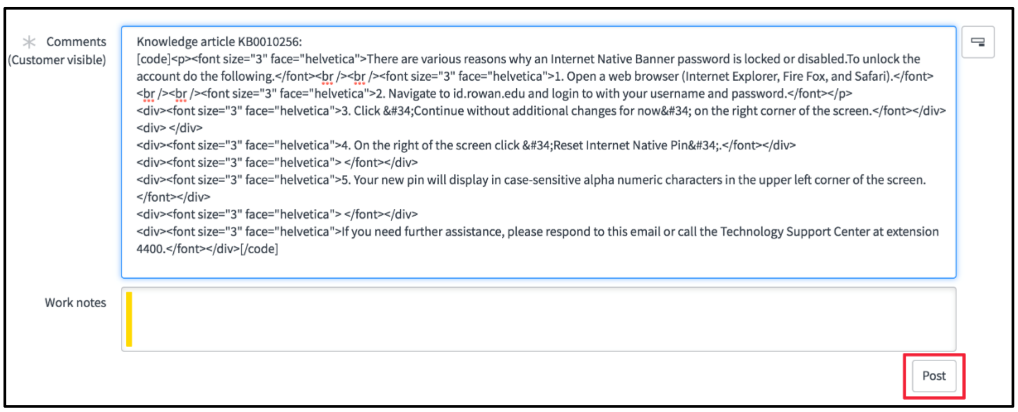


If you find an article that may provide a solution, click to open it and select the “Attach to Incident” button at the top of the window.

TIP: If you are **certain** that the article will solve the incident, you can simply **resolve the incident** with the knowledge article at this point. **See page 54.**

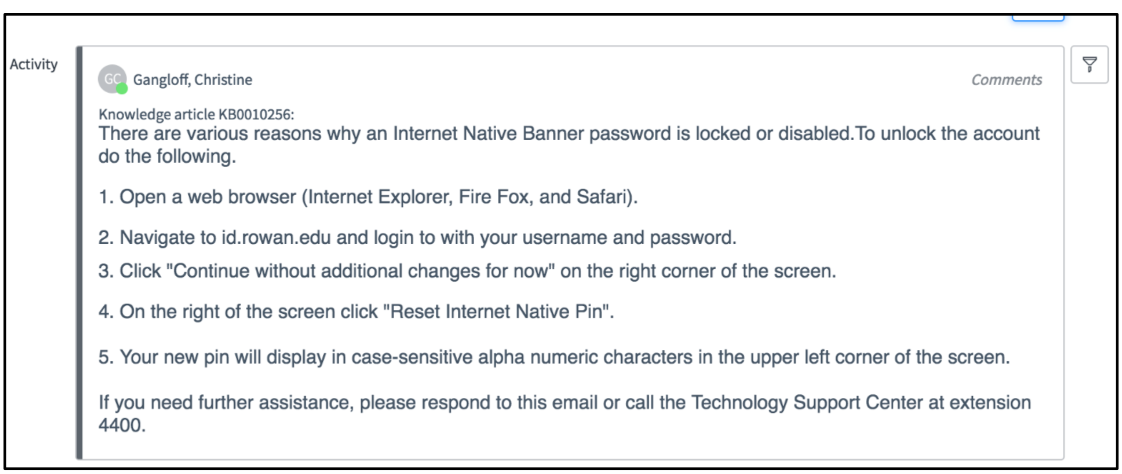


This will place the article in the "**Comments (Customer visible)**" field. You will notice that the article is in HTML markup. This is expected and will render as html when you hit post and in the client's email. This feature allows more full editing of knowledge base articles before sending.



Click "**Post**" to send the article to the Caller to see if this solution solves their issue.

You can then see the article properly formatted and as the Caller will see it in the **Activity Log** (below the Comments and Work Notes fields).



Resolving an Incident

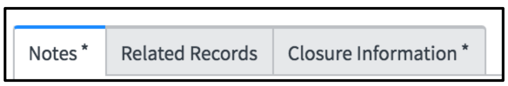
Best practices for incident resolution dictate that rather than closing incidents, they should be “Resolved” whenever possible. Resolving an incident provides a mechanism to verify that the caller is satisfied with the resolution and agrees that the incident can be closed.

When resolving an incident, double check that the Category and Subcategory (if applicable) are correct so that the incident can be reported on properly.

To resolve an incident, click the "**Resolve Incident**" button at the top or bottom of the form.

There are two steps when resolving an incident.

The first step is sending a resolution to the caller. Once you click "**Resolve Incident**" scroll down and you will notice an asterisk has appeared next to the Notes tab.

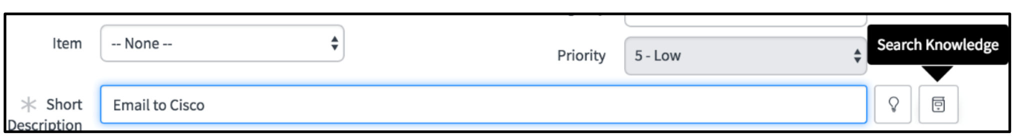


On the Notes tab, you will see that there is a red asterisk next to the "**Note to Caller**" field indicating that it is mandatory.

You will need to either type in the resolution information you are sending to the caller or insert a Knowledge article to send them.

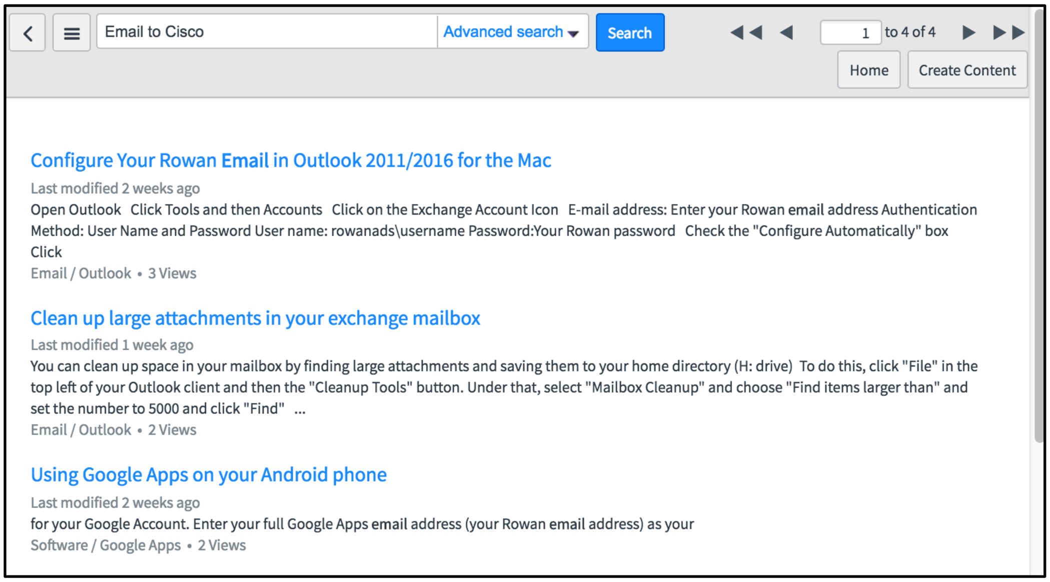
Resolution information (how and what it took to resolve the incident) should be concise. Anyone looking at the incident should be able to understand what was done to resolve it by reviewing the resolution information.

To resolve an incident with a Knowledge article, click the "**Search Knowledge**" icon next to the Short Description field.

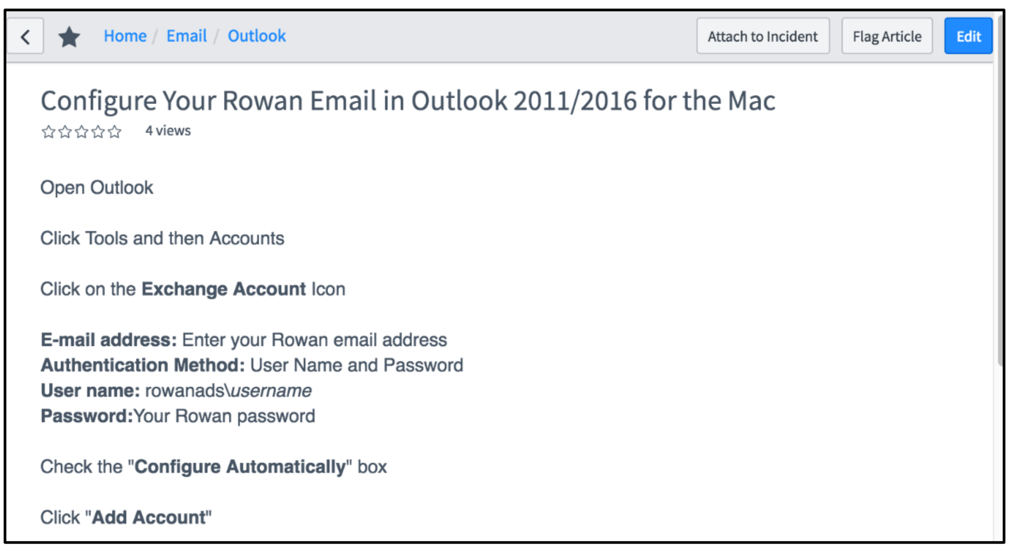


This will open a window that will automatically search the words in the **Short Description** field.

You can choose one of the articles it finds or change the search terms at the top of the window.

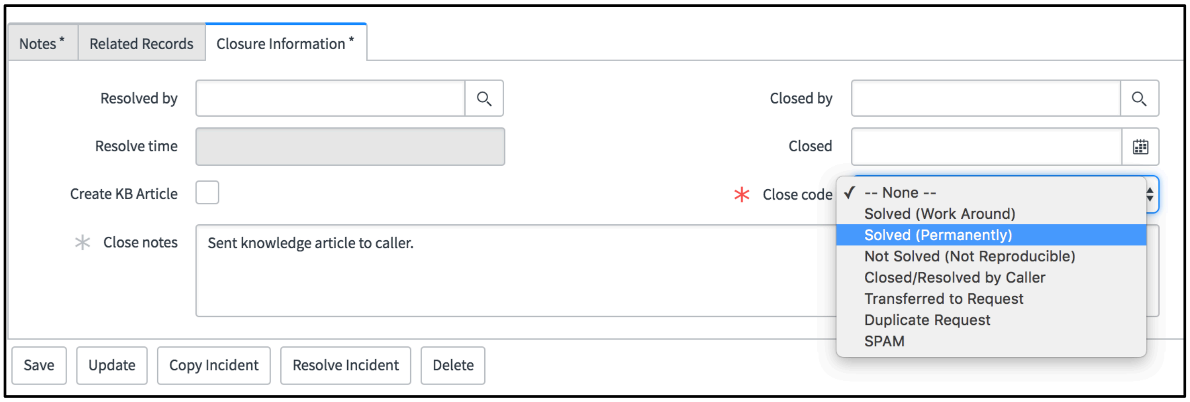


Once you find an article that will resolve the incident, open it and then select **Attach to Incident** in the upper right corner to place it in the **Comments** field.



The second step to resolving an incident is to enter close notes and a close code.

Click the "Closure Information" tab (now marked with an asterisk indicating that it contains required fields) and choose a **Close code** and add your **Close notes** and then click **Resolve Incident**.

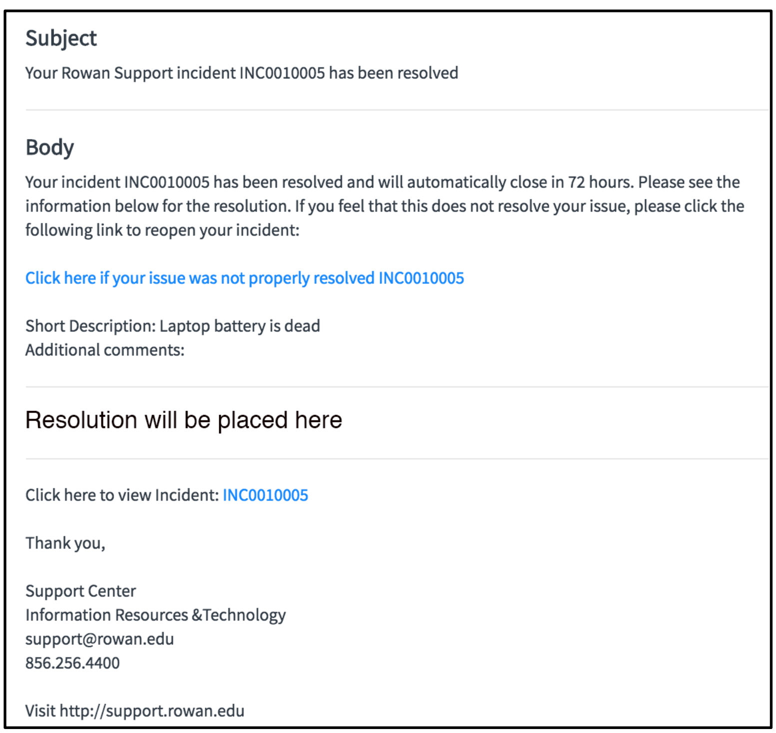


The caller will receive an email containing the resolution from the **Comments** field and a link to reopen the incident if they are not satisfied with the resolution.

Email responses to resolved incident notifications will result in an auto-response informing the user that resolved incidents do not accept replies and provides them with a link to log in to the Support Portal and reopen the incident.

Users will need to enter a comment detailing the issue they are still having related to the original incident and then select "Reopen Incident." The technician assigned to that incident will be informed that the incident has been reopened.

Once the incident has closed, a new incident will be automatically created if the user replies to the resolution email or clicks the "**Click here if your issue was not properly resolved**" link.



Subject

Your Rowan Support incident INC0010005 has been resolved

Body

Your incident INC0010005 has been resolved and will automatically close in 72 hours. Please see the information below for the resolution. If you feel that this does not resolve your issue, please click the following link to reopen your incident:

Click here if your issue was not properly resolved INC0010005

Short Description: Laptop battery is dead
Additional comments:

Resolution will be placed here

Click here to view Incident: INC0010005

Thank you,

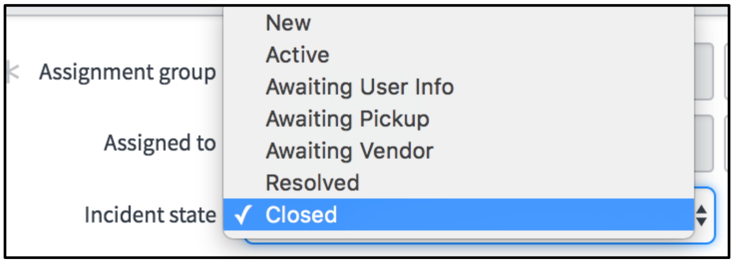
Support Center
Information Resources &Technology
support@rowan.edu
856.256.4400

Visit http://support.rowan.edu

Closing an Incident

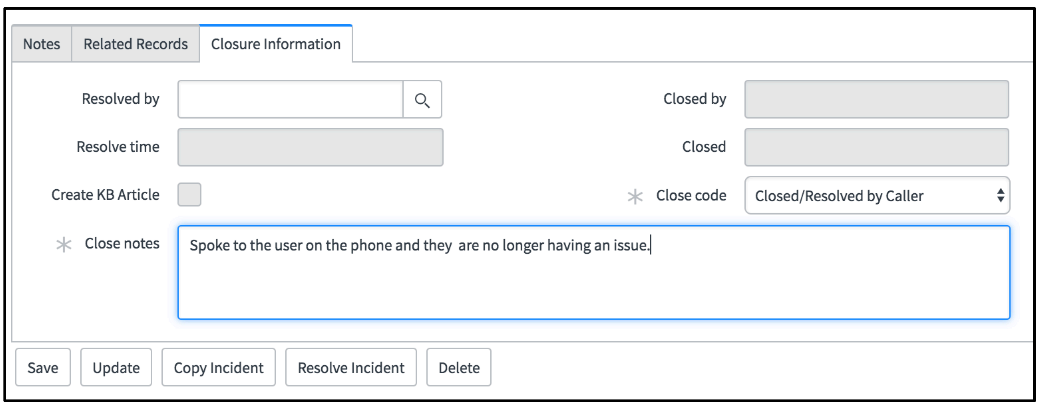
There may be times when an incident does not require a message to the caller and can simply be closed. For example, if an incident has been resolved and the Caller replies with a "Thank you" it may re-open the incident or, after the three-day resolution period, create a new incident.

To close the incident, change the **State** field to Closed.



You will then need to enter close notes and a close code. (if they haven't previously been filled in).

Click the "**Closure Information**" tab (now marked with an asterisk indicating that it contains required fields), choose a **Close code**, add your **Close notes** and then click **Submit** to close the form.

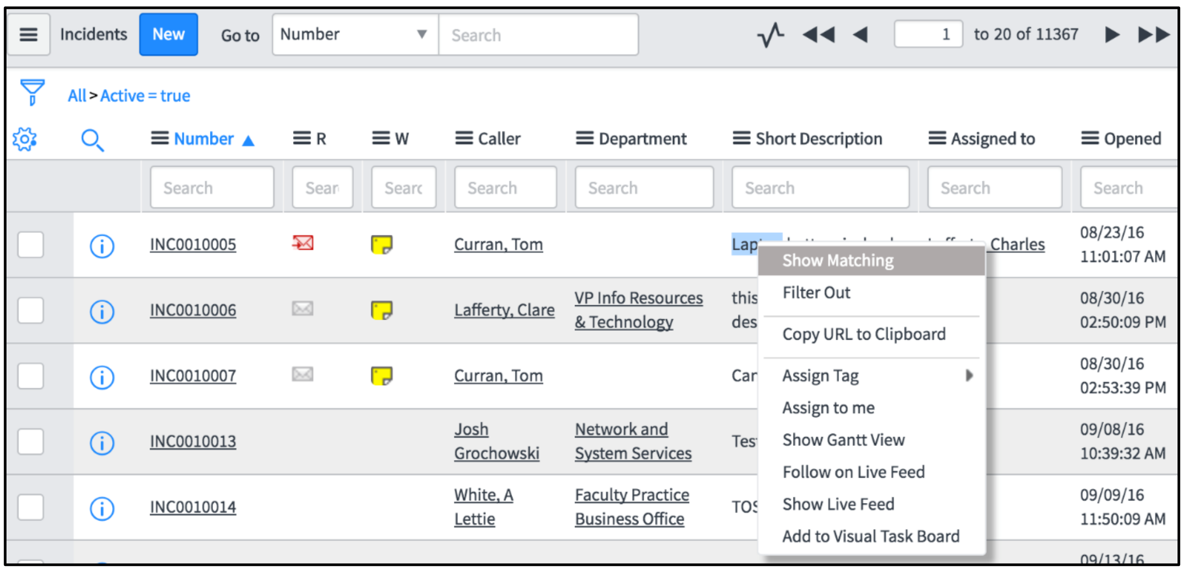


Copying an Incident

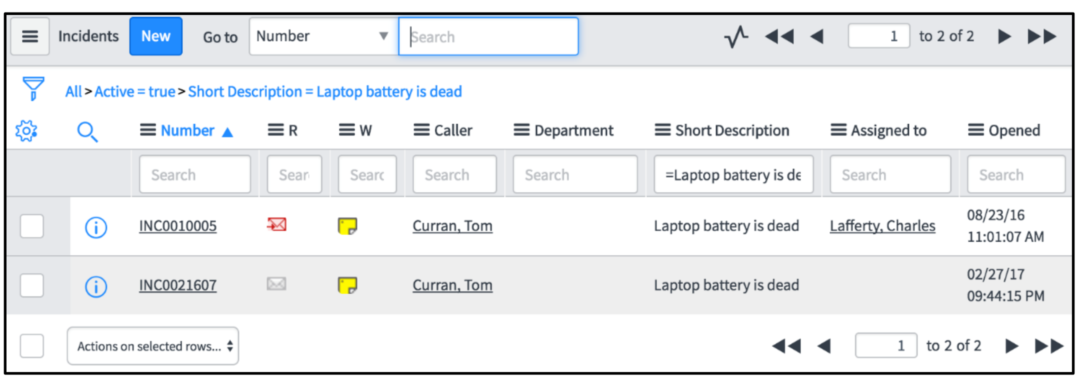
If a user sends an email that contains more than one issue, you may need to make a copy of the incident so you can assign the issues separately. For example, if a user says that their email and their voicemail isn't working, you'll need to copy the incident in order to assign those issues to two different groups. *This was called "splitting" an incident in ServiceDesk*.

When this happens, click **Copy Incident** at the top of the incident form. *The required **Assignment Group** and **Category** fields must be filled in before you can copy an incident. These fields can be updated once the copy has been created.*

This will then create a copy of that incident with an empty **Assigned to** field and the next sequential incident number. You can easily find the newly copied incident by right clicking the original incident's **Short Description** while in list view and selecting **Show Matching**.



This will show every incident with that exact short description and allow you to find the copy of the incident quickly.



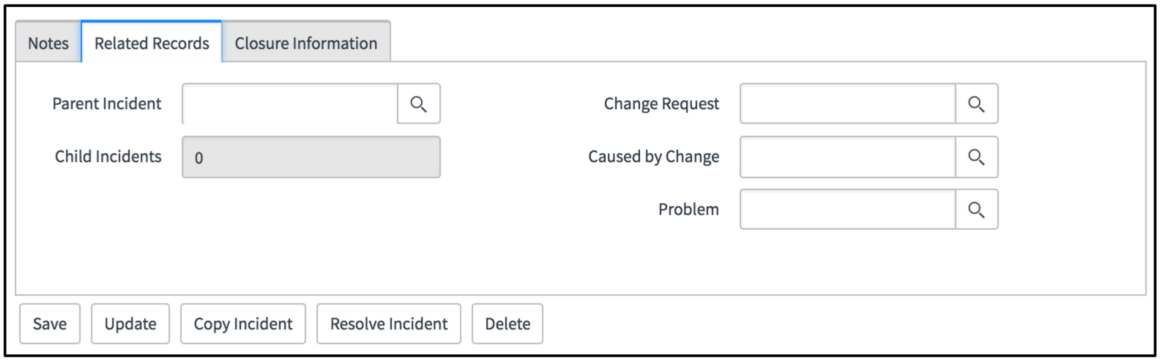
Linking Incidents to Changes

Incidents can be related to Change Requests in two ways:

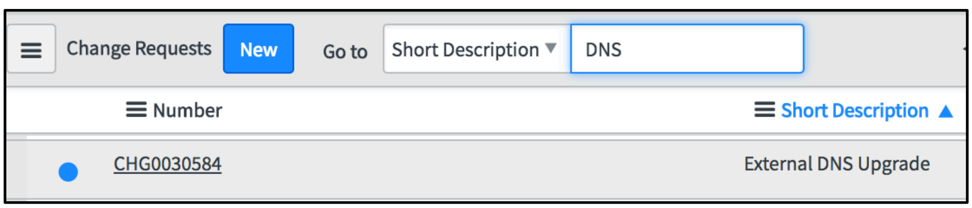
- Linking to a change that caused an incident.
- Creating a change from an incident.

Linking to a Change that caused an Incident

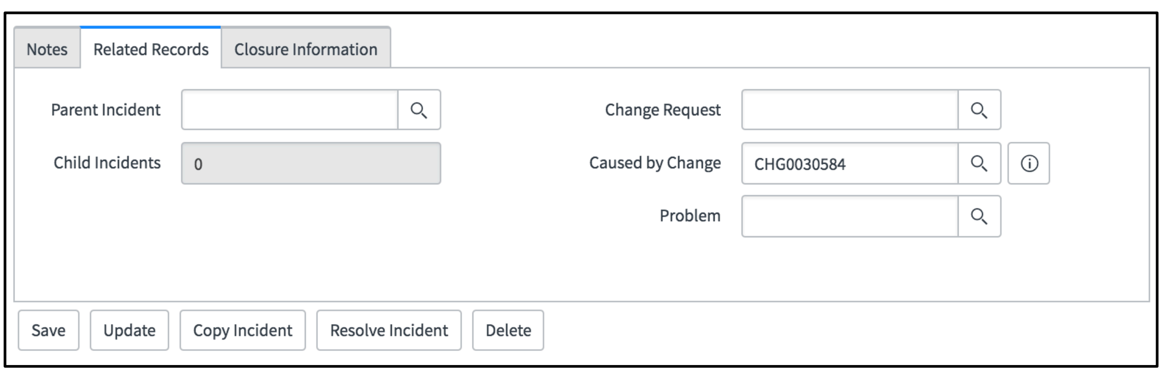
Below the Description field on the incident form, select the "Related Records" tab.



From here you can link to a change that caused the incident in the "**Caused by Change**" field. For example, if an incident involving undeliverable email is traced back to a DNS upgrade you can select the magnifying glass icon next to the "**Caused by Change**" field and search for the related change.



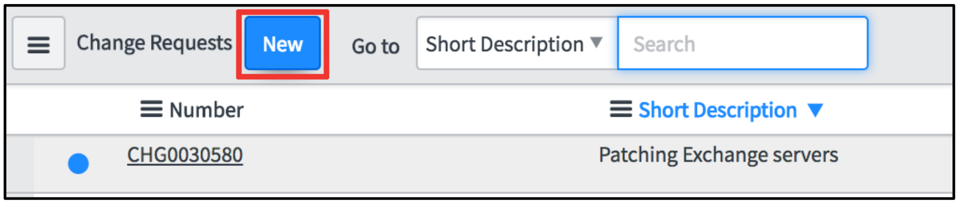
Once the correct change is located, select it to link it in the incident.



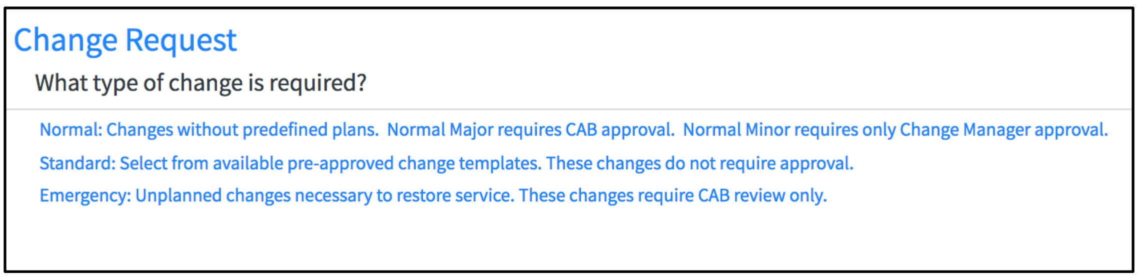
Creating a Change Request from an Incident

If an incident needs a change to resolve it, a change request can be initiated from the incident form.

For example, if a departmental application server stops functioning and needs an update to resolve it, a change request to perform that update can be created by clicking the magnifying glass next to the "**Change Request**" field on the "Related Records" tab. Click "New" in the resulting window.

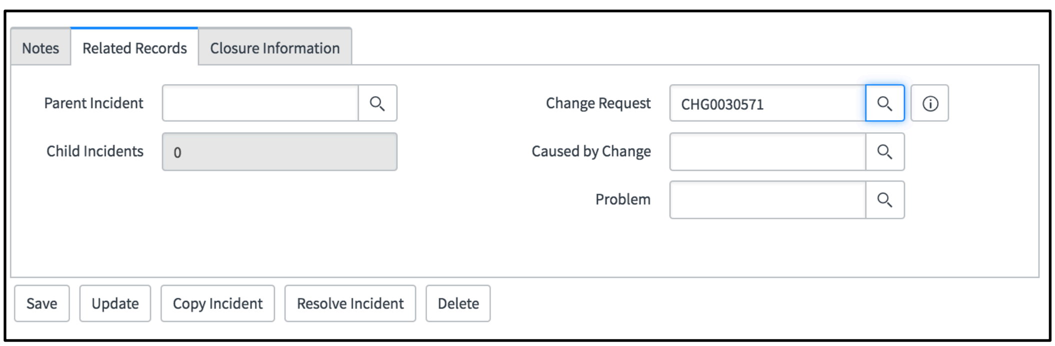


This will bring up the "New Change Request" selector.



Select the type of change and fill out the change form.

Once the change is submitted, the change number will be entered into the "**Change Request**" field on the incident form.



Email Notifications

Automatic Email Notifications

The caller will receive the following notification upon submitting an incident:

Subject

Rowan Support Incident INC0022711 has been opened.

Body

Dear Lydia Lopez,

This is an acknowledgement of your Support Incident received on: 03/09/17 01:57:12 PM EST
Subject: IRT please Remove email access and/or deactivate O'drive access
Rowan users can view the status of your incident here: INC0022711

If this issue is urgent, please call 856.256.4400

Visit our Service Portal to search the Knowledge Base or to get help.

Thank You!

Support Center
Information Resources & Technology
support@rowan.edu
856.256.4400

Follow @RowanIRT https://twitter.com/RowanIRT on Twitter for the latest updates on tech-related news at Rowan University.

Members of the Assignment Group will receive the following notification when an incident has been assigned to the group:

Subject

Rowan Support Incident INC0010005 has been assigned to group Elvis Support

Body

Short Description: Laptop battery is dead
Click here to view Incident: INC0010005

Description: Battery won't charge when plugged in
Created: 08/23/16 11:01:07 AM EDT

Comments:

The technician will receive the following notification when an incident is assigned to them:

Subject

Rowan Support Incident INC0010005 has been assigned to you

Body

Short Description: Laptop battery is dead
Click here to view Incident: INC0010005

Description: Battery won't charge when plugged in
Created: 08/23/16 11:01:07 AM EDT

Comments:

The caller will receive the following notification when their incident is Resolved:

Subject

Your Rowan Support incident INC0010005 has been resolved

Body

Your incident INC0010005 has been resolved and will automatically close in 72 hours. Please see the information below for the resolution. If you feel that this does not resolve your issue, please click the following link to reopen your incident:

Click here if your issue was not properly resolved INC0010005

Short Description: Laptop battery is dead
Additional comments:

Resolution will be placed here

Click here to view Incident: INC0010005

Thank you,

Support Center
Information Resources &Technology
support@rowan.edu
856.256.4400

Visit http://support.rowan.edu

Tips and Tricks

Reference Fields: Hover over a reference field's tombstone icon to see a preview of the information in that related record.

Short Descriptions: You can search the Knowledge base from a button on the incident form. It uses the short description for its search terms. When entering the short description, make sure to use a concise selection of key words that reflect the symptoms of the incident.

Viewing Lists: Quickly change which columns are displayed in lists by using the gear icon at the left of the header bar. Return to original default view by using the gear and select the "**Reset to column defaults**" box.

Right click on a column name to see options related to that column, such as sorting, charting or exporting.

Control-click any hyperlinked field to open the record in a new window or tab.

Quick Filters: Easily filter lists by right-clicking on a field value and select "**Show Matching**" or "**Filter Out**."

Default List View: If you don't see all of the fields or columns you should on a list check to make sure you are in the "**Default**" view. The other views, such as the "Self-Service" view, are limited and what the end user would typically see. Change your view back to the Default view from the Title Menu.

Group a list: Right click on the column header and select Group By from the context menu. Examples: Group By Severity, Group By Assignment Group.

The Number field must always be present and must **ALWAYS** be the first column in any list. If you move or remove this column the list will not display correctly.

Save versus Submit: Select **Save** to save the form and stay where you are. Select **Submit** (or Update in some cases) to save the form and close it.

Assigned to me: Click this module (within the Incident application) to view a list of incidents that have been assigned to you.

Logout: Make sure to close your internet browser completely to end your ServiceNow session.

Knowledge

Article Creation Standards

- Use Helvetica or Tahoma font, size 12

- Be careful when trying to copy/paste text into the edit window directly from web pages or programs such as Microsoft Word. The editor attempts to process the formatting and can fail, resulting in articles with hidden formatting that is difficult to fix. It is best to copy formatted content into a plain text editor to strip out formatting before copying it into the Knowledge base.

- Put articles in the appropriate Knowledge Base. Any article for users should be put in the " Public" space and anything for internal use only should be placed in the "Internal" space. More spaces, especially internal ones, can be created as needed.

    - **Public knowledge** is meant for end users. Articles may also be used internally for support, but this type of knowledge is meant for public consumption and should be created with a public audience in mind.
    - **Internal knowledge** is meant for technicians with direct access to the ServiceNow. This type of knowledge tends to be private support documentation.
    - **Human Resources** is used specifically for internal HR articles.

- Add a category to your article to allow uses to find them when they browse.

Public Knowledge Base Category Listing

**Sometimes, articles have multiple categories they could fall into - this can either be a judgement call or we can discuss the use of Tags. For example, you could list an article titled "Configure your mobile device for Exchange Email" under either "Email > Outlook and Exchange" or "Mobile Devices."

Knowledge Categories	**Definition**
Announcements	Articles placed here should be given the "News" topic. This will place it as an Announcement in the News module that will be placed on home pages.
Banner	Articles related to Banner
Blackboard and Canvas	Blackboard and Canvas articles
Cable TV	Cable TV and Rowan TV articles
Classroom and Computer Labs	Lab hours and TEC related articles, etc.
Desktops and Laptops	Computer buying guides, how to get a quote, loaner equipment and hardware related articles.
Digital Media Services	Lecture capture, Kaltura, media conversion, audience response system etc. articles.

Email and Calendar • Outlook and Exchange • Rowan Gmail	Articles specific to either Outlook/Exchange or Gmail should be placed in the appropriate subcategory - all others; such as encryption, mailing lists, etc. should be under the main Email and Calendar category
File Storage and Sharing • Google Apps • Home Directories • Openarea	Articles specific to Google Apps, Home Directories and the Openarea should be placed in the appropriate subcategory - all others such as removable storage, DropBox or anything else should be under the main File Storage and Sharing category.
Miscellaneous	Any articles that don't fit into an already specified category.
Mobile Devices	Encryption, reimbursement, Active Sync, mobile passwords, etc.
Network Connectivity	VPN, ClearPass, connection problems, etc.
Policies and Procedures	An area for IRT policies (or links to them in the Policies site) and procedures that do not fit into any of our existing categories.
Printing Services	Articles related to printing, copiers, etc.
RowanCloud and Citrix	Articles related to Citrix.
Security and Safe Computing	Phishing, malware, spyware, anti-virus articles.
Server and Application Hosting	Articles related to departmental application hosting and server creation, access and maintenance.
Software • Microsoft Office • Academic Software	Articles specific to Microsoft or Academic Software (such as Mathematica, Turnitin, etc) should be placed in the appropriate subcategory. All others, such as web browsers, operating systems, Acrobat, Adobe Suite, etc. should be placed under the main Software category.
Telephones, Voicemail and Video Conferencing	Articles related to telephones, CallXpress, Vidyo, WebEx, etc.
Training Services	How to find and schedule training, links to resources, etc.
Usernames and Passwords	How to obtain, change and use usernames and passwords.

Article Titles

Properly formed titles and meaningful keywords greatly help searching.

- The knowledge base search looks at titles first then article text followed by keywords.
- The title and keyword fields are weighted three times higher than the article text.

Follow these guidelines to better help users find your article:

- Write a single, concise sentence, ideally fewer than 10 words, summarizing the content.
- Do NOT use vague titles like, “Create a Space” or “Copy a Course.” If your title does not contain the name of the application or service you are referring to, please add it in the form of “Confluence: Create a Space” or “Blackboard: Copy a Course.”
- Use title case.
  - See http://titlecapitalization.com - with the second option "Capitalize words with five or more letters" selected.
- Use primary keywords related to the content in the first several words.
- Use words users will most likely search on.
- Delete “the,” “and,” or “is,” if possible. When appearing at the beginning of a title, these are generic, and take up space.
- Do not lead with commonly used words such as "How to."

Grammar and Usage Standards

- Use proper grammar. Some site-specific usage standards are outlined below. If in doubt, ask someone to review your article or check a grammar reference such as The University of Illinois Grammar Handbook. We also recommend installing a very helpful Chrome extension called Grammarly.

- Usage Standards
  - Home Directory (not H drive)
  - Outlook Web Access (not OWA)
  - WebMail (not Webmail)
  - Email/email (not e-mail)
  - Hardware:
    o Macintosh (not Mac)
    o Windows (not Win)
    o Linux
  - Software:
    o Mac OS X or macOS Sierra
    o Windows
    o Linux
  - Mobile Devices (not PDAs)
  - Website (not web site)
  - Homepage (not home page)
  - Use a hyperlink instead of spelling out a URL: The IRT Web Site

When to Use Bold Text

Use bold formatting to designate:

- Buttons: Click the **Submit** button; Select the **Yes** radio button.
- Drop-down menus and items: Select **Many** from the **Options** drop-down menu.
- Paths: Go to **Firefox > Services > Finder**.
  Be sure to leave spaces between the words and the **>** so screen readers (and other users) can easily interpret the text.
- Checkboxes: Select the **User** and **Administrator** checkboxes.

- Notes, Tips, Warnings: **Note:** This software is no longer available.
- Tabs: Clickable tabs should appear in bold: Click the **Control** tab to go to the next screen. However, do not bold if it is simply in reference to the name of the tab: The Control tab appears at the top of the page.

Images and Attachments

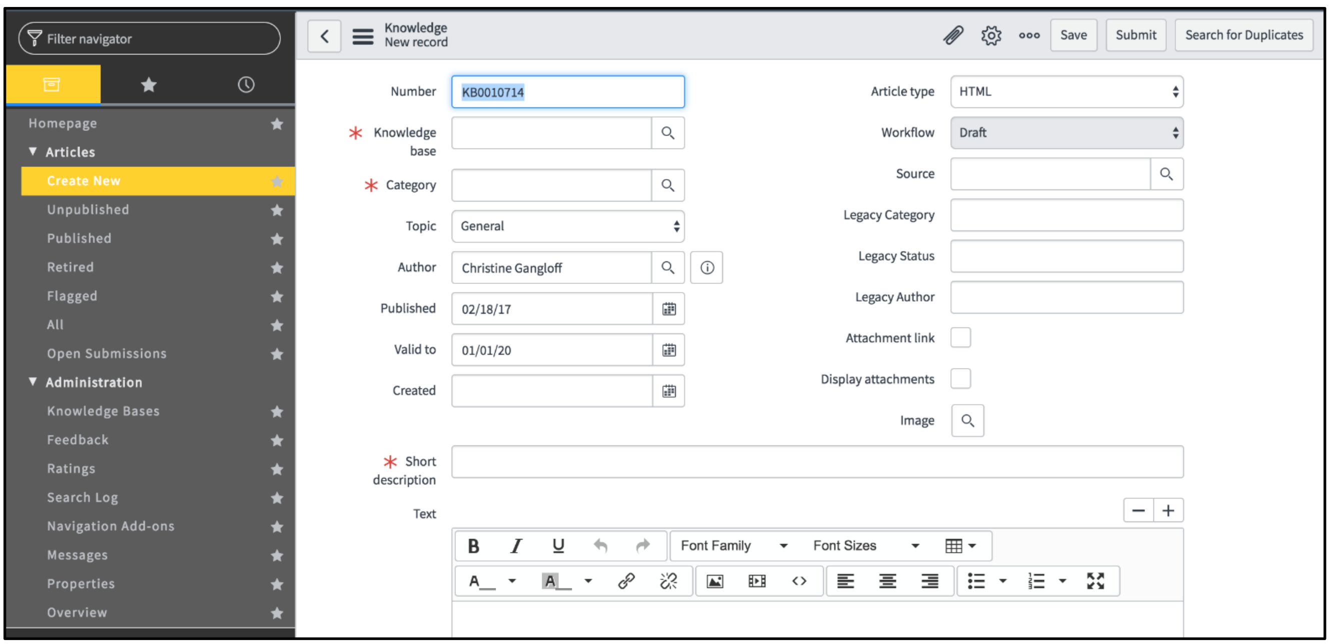
- Avoid using screen shots for obvious buttons in procedures, e.g., Next, Continue, OK.

- Keep images as small as possible, but be sure to maintain readability and context. Generally, 400x400 pixels is the maximum desired size so that images will fit on the page without scrolling and not be disruptive the flow of the document. You can crop images to show only the relevant portion of the screen or shrink the image to achieve your desired image size.

- Add a 1pt border thickness to all images that don't already have a dark background.

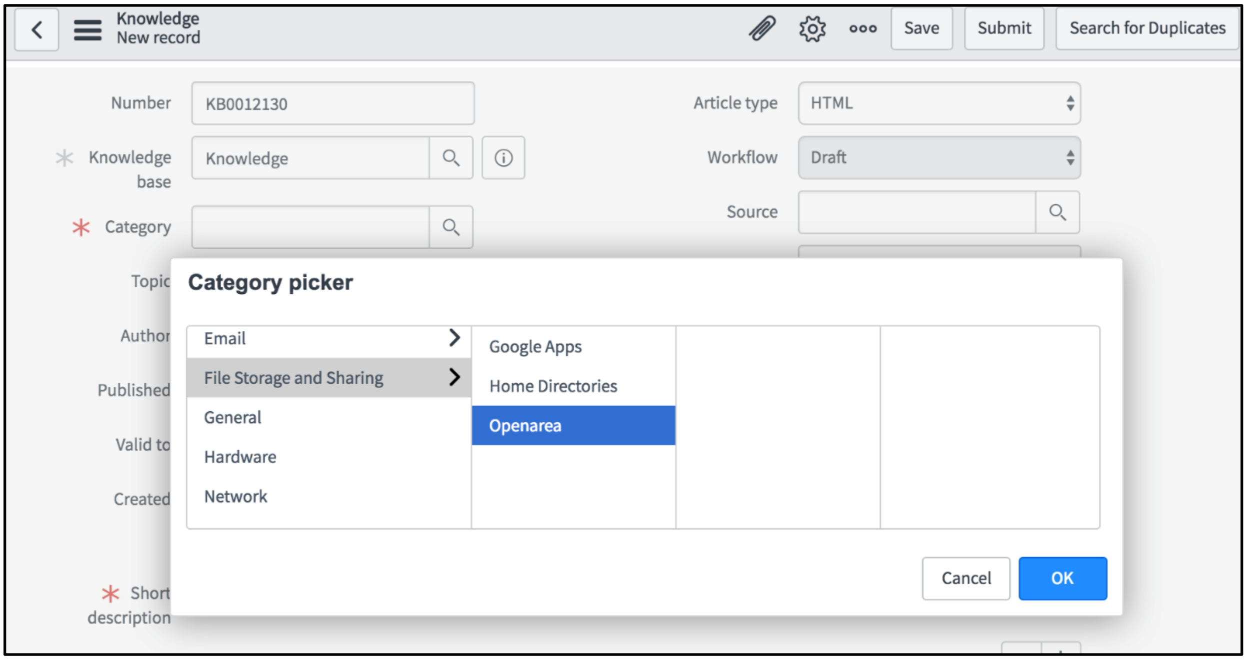
Creating a Knowledge Article

Expand the **Knowledge** application or search for "knowledge" in the Filter Navigator on the left and click "**Create New.**"



Click the Magnifying Glass icon next to "**Knowledge base**" and choose "Public" for a public article or "Internal" for a private article.

Next, click on the Magnifying Glass icon next to "**Category**" and choose a category from the provided list.

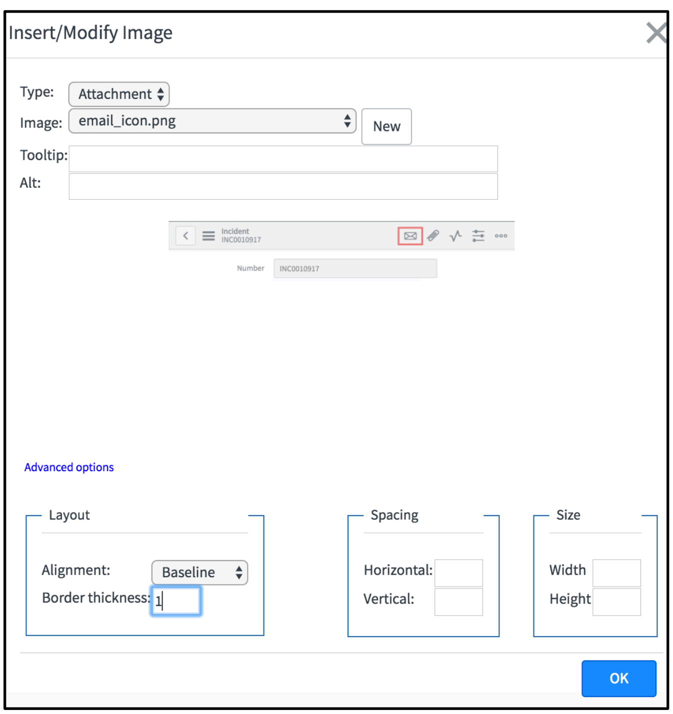


Leave all other fields as they are and enter a Short Description and the Text of your article.

To ensure that the article you are creating does not already exist in the Internal or Public KB, once those three mandatory fields are filled in, click **Search for Duplicates** in the top right. If there are duplicates, disregard the new article. If there are no duplicates continue entering information into the form.

Next, add attachments or images if applicable.

Please make sure to add a border thickness of 1 to any image without a dark background.



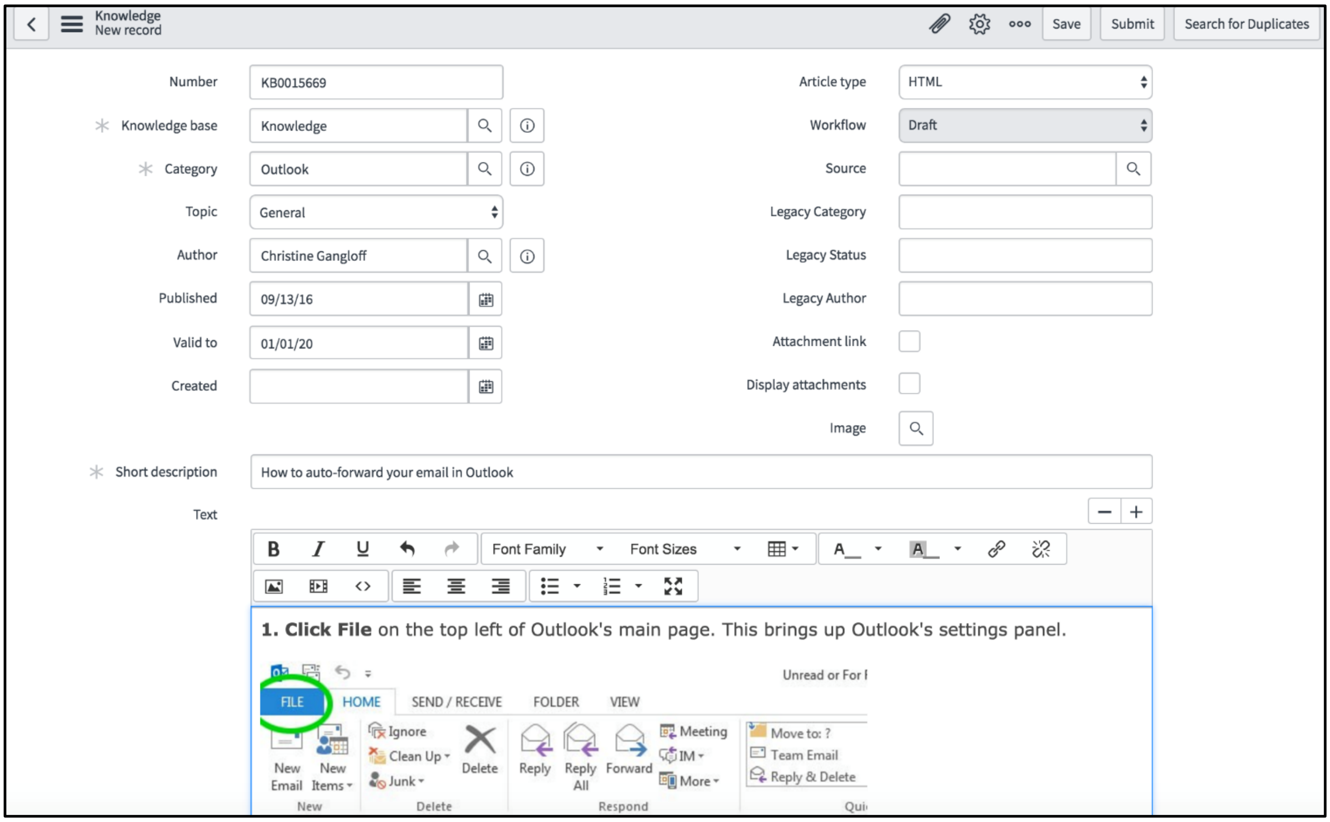
Enter the “Tag(s)” in the Meta field.

Save the article.

At the bottom left of the screen select **View Article**, which will allow you to see how others will view the article. Click all hyperlinks to ensure they work properly.

Update and Submit the article for approval and publication.

Once complete, click "**Save**" to stay on the form or "**Submit**" to leave the form and go to the list of all articles.



Once the article has been submitted, a Knowledge Admin will be tasked with approving it.

Knowledge Form Details	
Field	**Description**
Knowledge Base	The knowledge base selected for this article, Public or Internal.
Category	The category for this article. Select a Knowledge Base before you select a category. Articles without a category appear on the knowledge homepage in the (empty) category.
Published	When this knowledge article was published. This value is set when the article is created, and updated when the article is published.
Valid to	When this knowledge article expires. Articles do not appear in search results after the valid to date or if the valid to date is empty.
Image	An image that appears beside the article when searching from the legacy knowledge portal.
Workflow	[Read-Only] The publication state of the article, such as Draft or Published. When inserting a new article from an existing article, the state of the new article is reset to Draft.
Source	The task this knowledge article was created in response to, if any. This field is set automatically when you create the knowledge article from a task record.
Attachment link	Check box for downloading an attached file automatically when a user accesses the article, instead of opening the article view. Add one or more attachments to the article to use this option. Note: You may attach multiple files, but most web browsers permit users to download only the first one. To ensure download of all the files, bundle them into an archive, such as with WinZip, and attach the archive.
Display attachments	Check box for displaying attachments to users viewing this knowledge article. Attachments appear below the article text. Add one or more attachments to the article to use this option.
Short description	The title of the article. This title appears when browsing and searching knowledge, and at the top of the article.
Text	Content for the article. Use the WYSIWYG HTML editor to create content. A preview of the content appears when browsing and searching knowledge.