AUBURN UNIVERSITY
Office of Information Technology

SERVICENOW: AGENT BASICS

aub.ie/snowtraining-agentbasics

Last Updated	
Date	October 30, 2024
Updated by	Josh Henderson

Table of Contents

I. Introduction 3
II. General Navigation 4
III. Incident Management 9
IV. Service Catalog Overview 22
V. Workspaces 27
VI. Change Requests 28
VII. Knowledge Management 32
VIII. Reporting Overview 35
IX. Finding Stuff 38

I. INTRODUCTION

A. WHAT IS SERVICENOW?

ServiceNow is the enterprise platform to organize and manage Auburn University's IT Service Management (ITSM) efforts. ServiceNow is based on the Information Technology Infrastructure Library (ITIL) framework, the most widely accepted approach to ITSM. ITIL training is available within the LinkedIn Learning catalog of courses. *ITIL® unveiled: A journey begins | LinkedIn Learning*

Using an extensible database called the Configuration Management Database (CMDB), ServiceNow branches interconnectedly into IT Operations Management, Security Operations, IT Business Management, and a suite of other modules.

The Office of Information Technology (OIT) website (auburn.edu/oit) is a ServiceNow module called Service Portal.

B. WHAT IS AN AGENT?

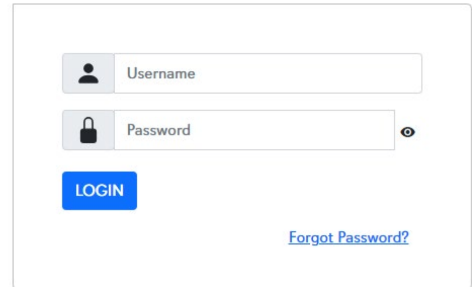
Within ServiceNow, access to modules and resources is based on roles. Agents (or Fulfillers) are individuals that are given the *itil* role within the ServiceNow Platform to fulfill service requests, complete tasks, answer questions, and assist those seeking help.

C. SERVICENOW LINKS

- Service Portal – auburn.service-now.com/it
- Now Platform – auburn.service-now.com

II. GENERAL NAVIGATION

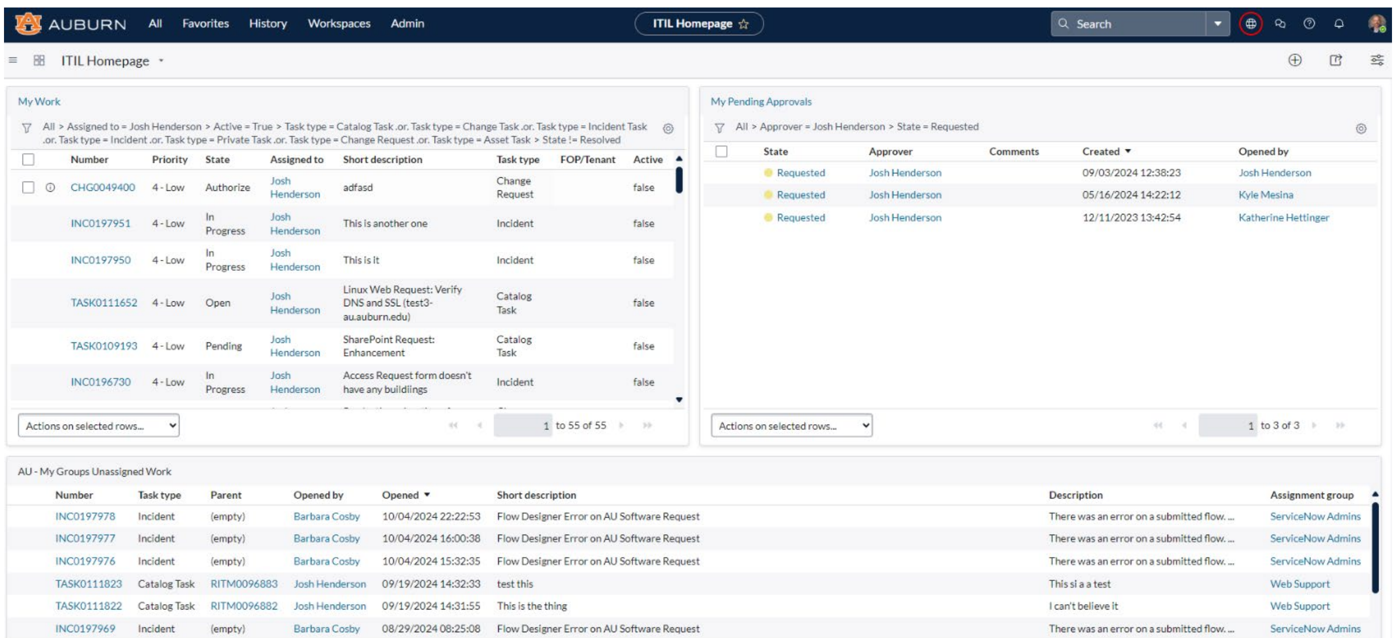
A. LOGGING INTO SERVICENOW



The Now Platform (auburn.service-now.com) uses AUthenticate for Single Sign-On. Log in with your Auburn username and password.

B. LANDING PAGE

Initially, the landing page will be the ITIL Dashboard; however, if you visit another dashboard, whichever one you last visited will load the next time you log into the Now Platform. We'll give a quick overview and dive into some areas more deeply. *(An alternative to this landing page is the IT Dashboard.)*



1. CONTENT AREA

The largest part of the Now Platform is the Content Frame. Within the Content Frame is where you do most of your work. Here you will interact with widgets, lists, forms, dashboards, and wizards. We do not include a screenshot specifically of the Content Frame at this point in the document because it varies considerably from user to user and depends on which module you have selected (more on modules later).

2. HEADER

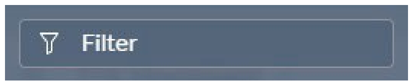
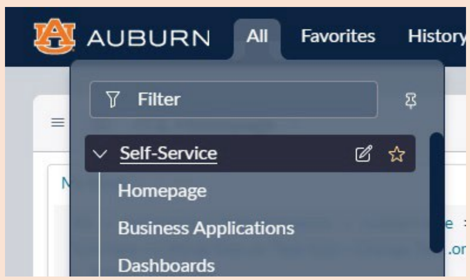
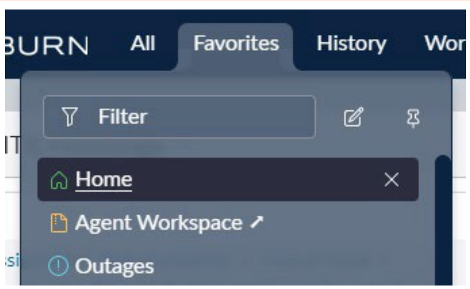
Running along the top of the page is the Header.

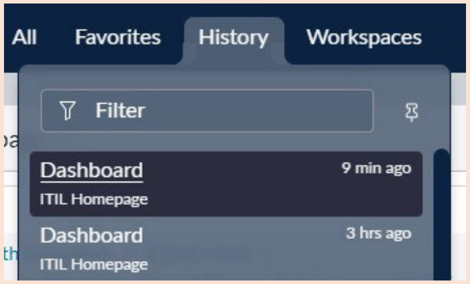
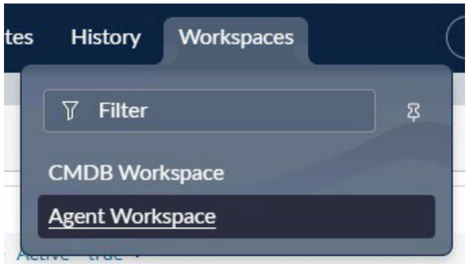
The Header contains:

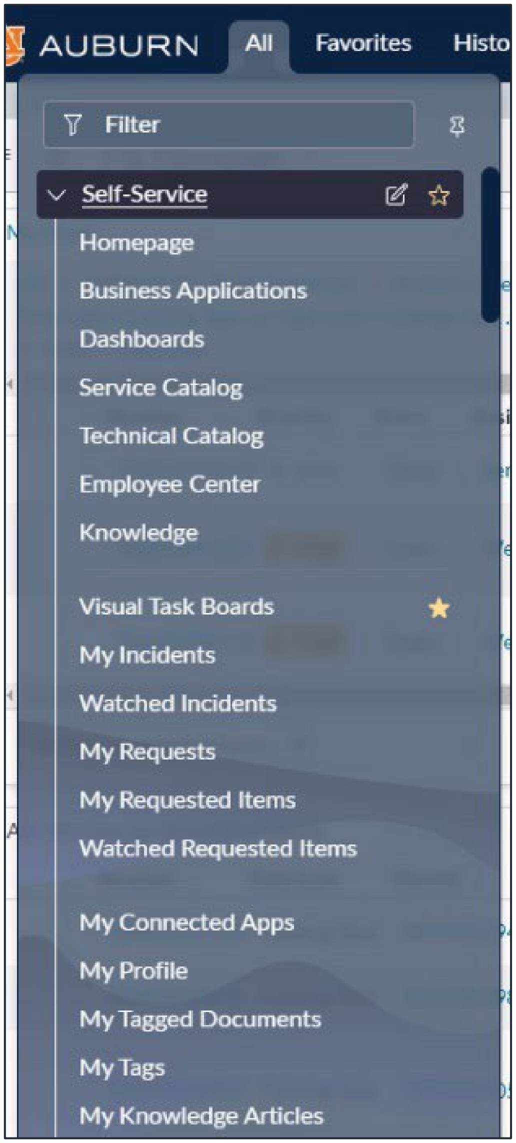
- Auburn Logo: Clicking it takes you back to the home landing page.
- Menu Items: Retrieve menu items and modules you can access in the instance, favorite them and return to items previously visited in your history.
- Contextual App Pill: See where you are in the instance and favorite the current item if desired.
- Global Search: Search across the instance.
- Scope/Update Sets: Setting only available for admins and developers.
- Help: Access on-demand, contextual help documentation when you need it.
- User Menu (avatar): Personalize your instance and set user preferences.

3. MENU ITEMS

Menu Items along the top, All, Favorites, History, and Workspaces are described below. Be aware that only one menu item may be pinned to the sidebar at a time.

Item	Image	Description
Auburn Logo		Returns to you the home landing page.
Filter		Filter field to quickly navigate to the module or item you want. For a list view, enter the table name in the format ***name***.list, for example, incident.list.
All menu		Lists all the menu items and modules in the instance to which you have access.
Favorites menu		Items you've marked as favorites. Edit favorites with the pencil icon next to the filter field.

History menu		History of your activities across the instance.
Workspaces menu		Lists of workspaces to which you have access. This item displays only if you have access to a workspace. If you have access to only one workspace, the name of the workspace you have access to displays in the header.



C. SELF-SERVICE MODULES

The Self-Service application and its modules are only available to those with the ITIL role. Many agents spend all their time with these modules.

1. HOMEPAGE

The default ITIL Homepage is a dashboard that contains tasks, approvals, incidents, and requests assigned to you and your group(s) will be displayed. These preset defaults were selected to help agents be efficient in providing support.

2. DASHBOARDS

Dashboards enable you to display multiple analytical data, reports, and other widgets on a single screen. Use dashboards to create a story with data you can share with multiple users.

3. SERVICE CATALOG AND KNOWLEDGE

Service Catalog and Knowledge can be accessed through the Self-Service application, these experiences have been optimized for Service Portal.

4. VISUAL TASK BOARDS

These Kanban-style boards allow you to organize your tasks and drag them from one state to another. Task Boards can be unique to you, or you can share them with others. VTBs can be data-driven using filters to show specific information or they can be freeform boards where you create private tasks for yourself.

> **Pro tip**: Save the task boards you use frequently as a favorite for quick access.

III. INCIDENT MANAGEMENT

A. WHAT IS AN INCIDENT?

An **incident** is an **unplanned interruption** or a reduction in the quality of a service

A **request** is a channel for individuals to request and receive services

A **problem** is the underlying **unknown** cause of one or more incidents

Incident Management covers the entire lifecycle of an incident from its detection until its resolution and closure.

Incident Management **does not** include root cause identification, trend analysis, and proactive implementation of changes targeted to prevent future incidents. These areas are part of the **Problem Management** process and/or **Change** Management process.

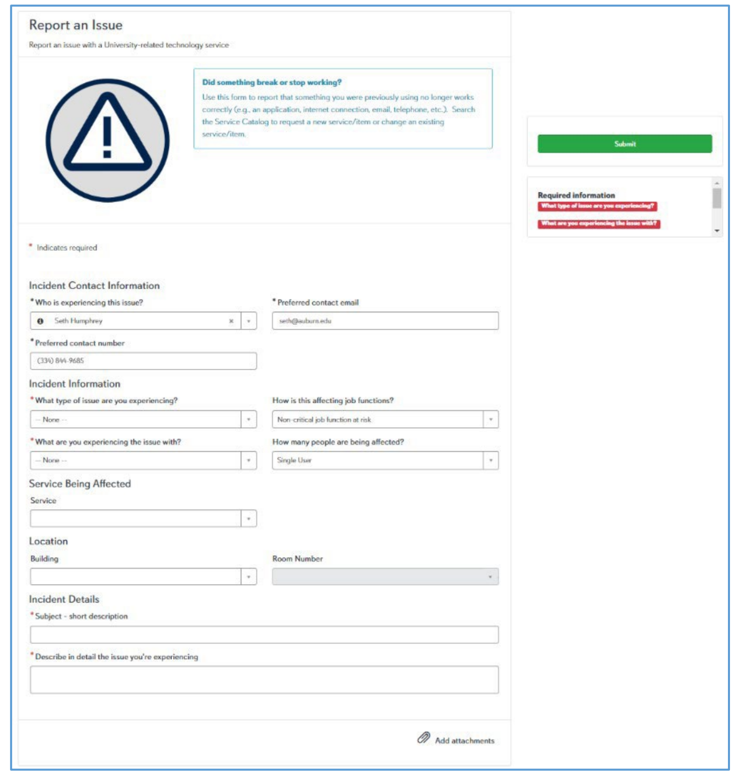
Watch: This video provides an overview of Incident Management: ***https://www.youtube.com/watch?v=-DouiXRBl6s***

B. USER INFORMATION AND ASSIGNMENT GROUPS

- Every night user account information is imported from Active Directory and eDirectory.
- Agents have been placed in Assignment Groups and can be managed using a fully automated request form (support document).
- Most Assignment Groups have been given the ITIL role, which gets inherited by its members, allowing them to access and work on Incidents, Service Requests, Change Requests, Reports, and more.

C. CREATING AN INCIDENT (CUSTOMER PERSPECTIVE)

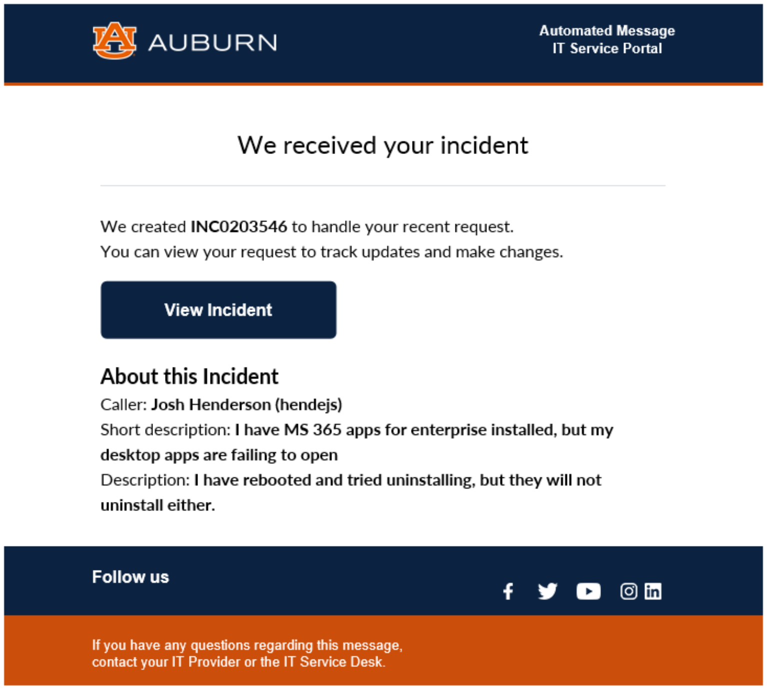
The IT Service Desk (SD) is typically the initial point of contact for Incidents. These are initiated by phone, email, walk-in, chat, or self-service by using the Service Portal. The Get Help section on the OIT homepage is a shortcut to a category within the Service Catalog designed to put the customer in contact with a person to assist them. Selecting Report an Issue will generate an Incident.



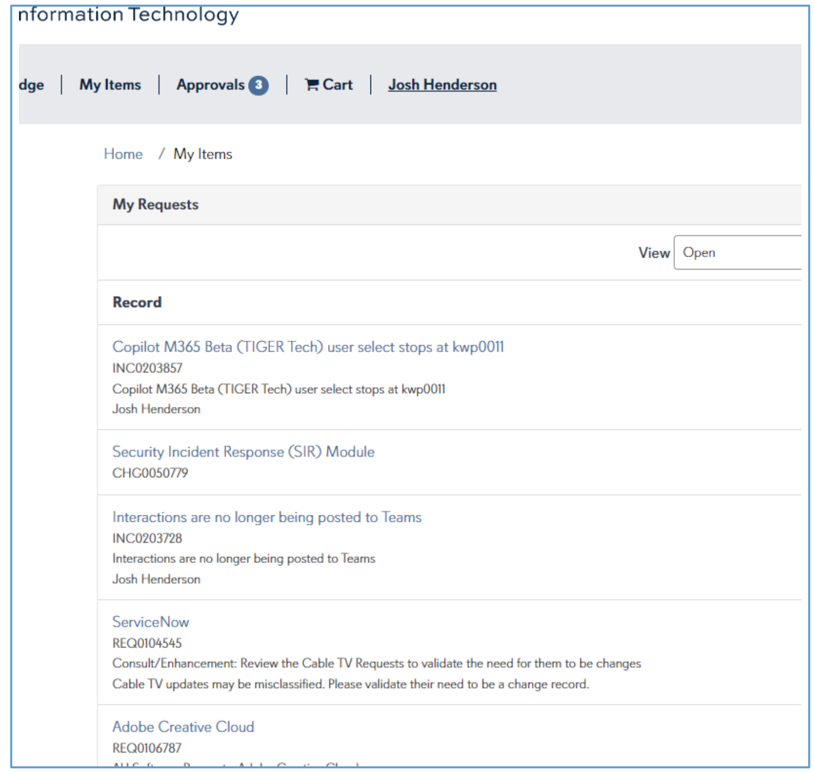
The Caller must enter contact information, categorizing information, and incident details; however, the more information entered, the better.

Selecting Service can cause the Incident to circumvent the SD and route directly to 2^{nd}-tier support agents for better engagement.

When Incidents are created, the Caller is sent a notification with a subject like: “Incident INC0203546 was created”.



Customers can check the status of their Incidents and Requests through the Service Portal by selecting My Items in the navigation bar after logging in.



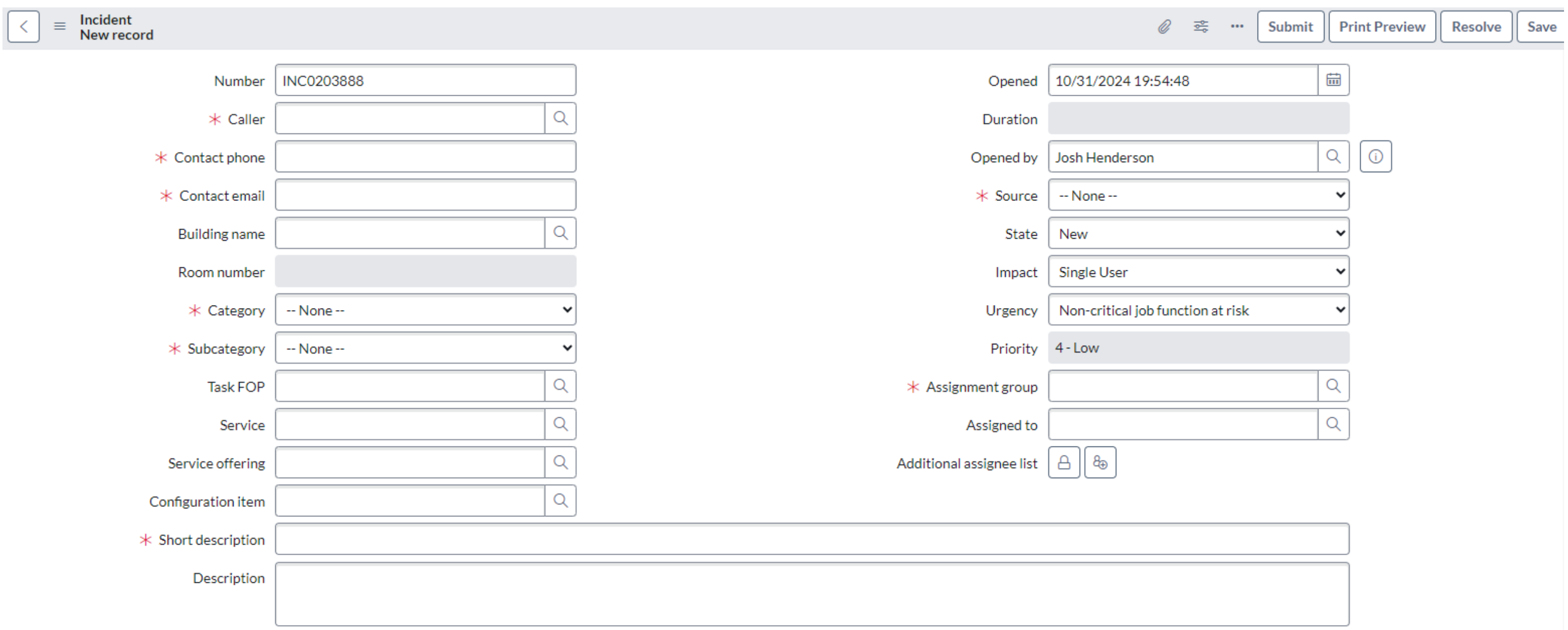
D. CREATING AN INCIDENT (AGENT PERSPECTIVE)

To create a new Incident record:

1. Log into the Now Platform
2. Use the All menu and filter for Incident
3. Find the Incident application and select its child module Create New
4. Fill in the mandatory fields (*) and additional fields that may help troubleshoot the issue

> **Pro Tip**: Watch the **Assignment group** field has you fill in the data fields. Data lookup rules will suggest who to send the Incident to, but it is up to you to leave the suggested value or overwrite that with the group that should receive the Incident.

5. Press the Submit button



1. NUMBER

The Incident number is unique for this record. All incidents begin with INC, followed by a series of numbers.

2. CALLER

This is the individual that is having the issue.

> **Pro Tip:** search by username, banner number, or name; use the * wildcard.

Once an individual is selected you can select the information button ⓘ to see most of the information for that individual from the user record table.

> **Pro Tip:** Hold **Shift** while that box is activated to be able to scroll through it.

3. CONTACT PHONE AND CONTACT EMAIL

These data fields augment the user record table with contact information for the caller, which may be different than the information imported from the nightly data pulls.

4. CATEGORY AND SUBCATEGORY

Use these field to categorize the type of issue the caller is experiencing.

5. SERVICE, SERVICE OFFERING, AND CONFIGURATION ITEM

If known, choose the Business Service that is experiencing the issue and/or related to the issue. This data element is one of the best metrics for the types of Incidents received.

A Configuration Item (CI) is an item within the CMDB that is being tracked throughout its lifecycle. If the incident is directly related to a CI this should be selected.

6. BUILDING NAME AND ROOM NUMBER

If applicable to the incident, these should be set to where the caller is experiencing the problem.

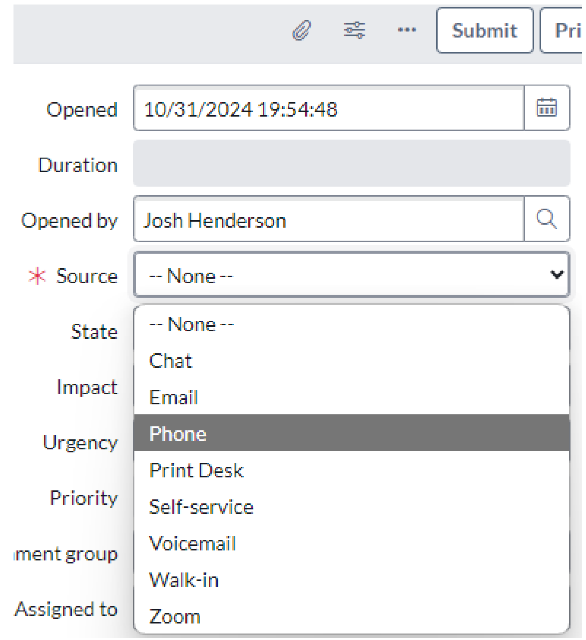
7. OPENED AND OPENED BY

These fields are automatically set by the system when a new incident record is created.

8. SOURCE

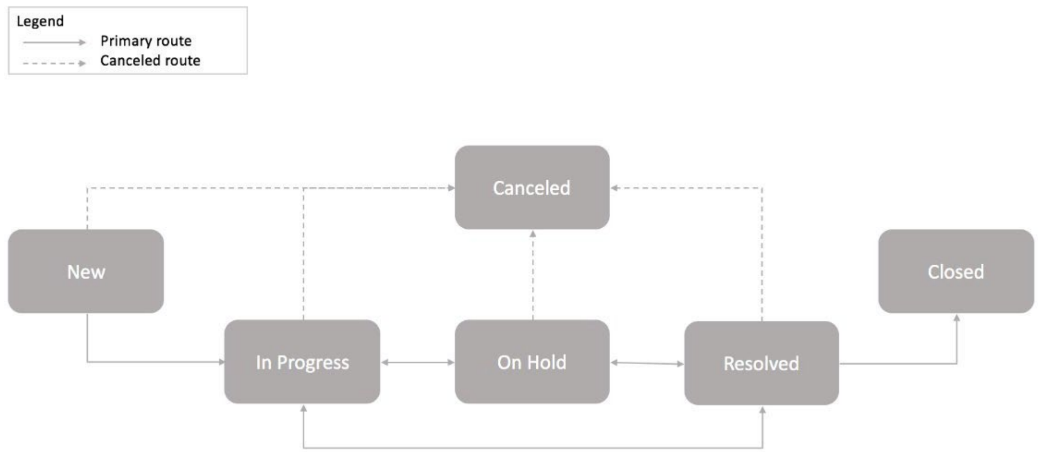
Select the method by which the caller-initiated contact.

Value	Definition	How the value is set
-- None --	Default option when creating an incident from within the Now Platform	Default
Chat	Individual initiates a Bomgar chat session	Manually set
Email	Individual emailed the agent	Manually set
Phone	Individual called the agent	Manually set
Self-Service	Individual uses the Service Portal to ask a question or report an issue	Automatic
Voicemail	Individual left a voicemail for agent	Manually set
Walk-In	Individual visits the agent in person	Manually set
Zoom	Individual reached out via Zoom	Manually set



9. STATUS (INCIDENT LIFECYCLE)

Each Incident begins with the New status and ends with either the Canceled or Closed status. This diagram shows the possible values along the way. Below will break down each step in more detail.



State	Description
New	Incident record is created but issue not yet triaged.
In Progress	Assigned to an agent (being investigated); automatically advanced to In Progress once the incident has been assigned and saved.
On Hold	Incident cannot be resolved because response is needed from the Caller or work must be completed by another system or entity before the record can be resolved. This state pauses the SLA clock. On Hold Reasons: • Awaiting Caller - Signifies the Incident is awaiting Caller response before the record can be resolved. To save the record with this On Hold reason requires a new comment

	added to Additional Comments field in the Activity Feed. • Awaiting Change - Signifies the Incident cannot be resolved until a change to system or service must take place and tested before the record can be resolved. • Awaiting Problem - Signifies that a large problem exists and resolution for this ticket is pending a solution or workaround for a problem. • Awaiting Vendor - Signifies the Incident cannot be resolved until work is completed by a Vendor.
Resolved	A satisfactory fix is provided for the incident to ensure that it does not occur again. The Close code and Close notes must be completed before an incident can be placed in the resolved state. These fields are found on the Resolution Information tab. The incident automatically continues to the Closed state after 24 hours being Resolved.
Closed	Once an incident is in a Closed state, it can no longer be updated. The Activity Feed and most fields will not be editable.
Canceled	

10. IMPACT, URGENCY, AND PRIORITY (KEY CONCEPT)

Incidents should be processed in an order determined by three metrics available in the incident form:

- Impact – a measure of the effect this incident has on business processes
- Urgency – a measure of how long it will be until the incident has a significant impact on the business
- Priority – the relative importance of an incident; identifies how quickly action should be taken on the incident

Impact	
3	Single User (default)
2	Multiple Users
1	Most Users

Urgency	
3	Non-critical job function at risk
2	Critical job function diminished
1	Unable to perform critical job function

Prioritization Matrix

The Prioritization Matrix reflects the Business Impact and Situational Urgency combinations and the resulting Incident/Problem priority.

Impact \ Urgency	1	2	3
1	P1 - Critical	P2 - High	P3 - Moderate
2	P2 - High	P3 - Moderate	P4 - Low
3	P3 - Moderate	P4 - Low	P4 - Low

11. SERVICE LEVEL AGREEMENTS (SLA)

An SLA defines the agreed-upon level of service availability. Specifically, regarding Incidents, SLAs define the amount of time that is expected for the caller to receive a response (starting the lines of communication) and a resolution (a solution provided to the caller). IT has only set SLAs for incident resolution time. The SLA clock can be paused based on certain conditions, which is typically a change in the state to “On Hold > Awaiting …” since this means the problem is being addressed. The SLA clock stops at resolution.

Failure to meet an SLA (duration has expired) should be investigated to determine if the appropriate Priority level was assigned, workloads are properly balanced, and that notifications are given proper attention to help address why the time duration was not met and to prevent future expirations.

Name	Duration	Schedule
Priority 1 - Response	TBD	TBD
Priority 1 - Resolution	4 work hours	AU normal hours & holiday schedule
Priority 2 - Response	TBD	TBD
Priority 2 - Resolution	8 work hours	AU normal hours & holiday schedule
Priority 3 - Response	TBD	TBD
Priority 3 - Resolution	24 work hours	AU normal hours & holiday schedule
Priority 4 - Response	TBD	TBD
Priority 4 - Resolution	40 work hours	AU normal hours & holiday schedule

SLA Notifications

Notifications are sent when the SLA clock reaches a certain percentage of time elapsed.

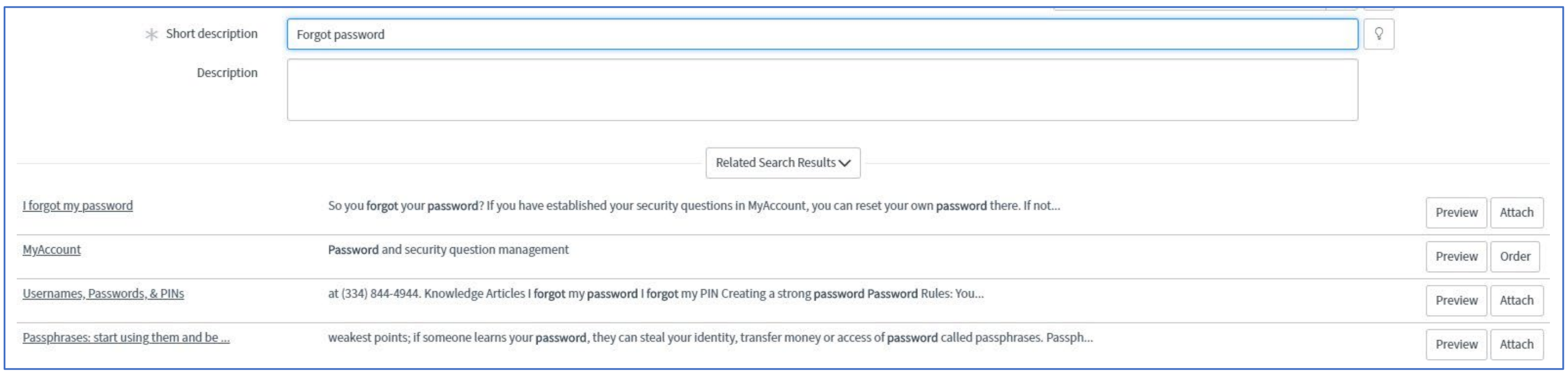
% of SLA	Type	Recipient
~50% (varies)	SLA Warning	Fulfiller Assigned to Incident
100%	SLA Failure	Fulfiller Assigned to Incident Fulfiller’s Supervisor

12. ASSIGNMENT GROUP AND ASSIGNED TO

Incidents should be routed via Assignment group. That group will then be responsible for assigning the Incident to a specific agent. Incidents may be routed directly to agents, but this is inadvisable unless you know that person is available to work the issue. The Assigned to selections represent the assignment group membership.

13. SHORT DESCRIPTION, DESCRIPTION, AND RELATED SEARCH RESULTS

Pretty obvious here, the Short description should be an abbreviated description of the issue the caller has described. The Description is the more detailed explanation of the issue. When the Related Search Results are visible the related Knowledge Base results are driven by the text within the Short description. You may preview and attach these KB articles. Attaching sends places a link to the KB article in the additional comments section for you to easily send to the caller.



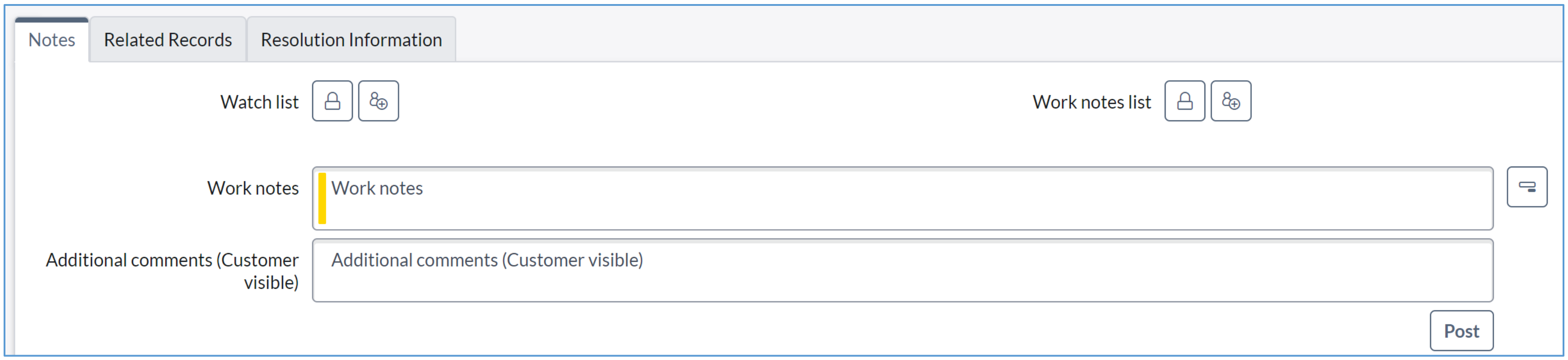
14. NOTES TAB

The Notes tab is the home for the Activity Feed (work notes, additional comments, and more), watch list, and work notes list.

Activity Feed

The activity feed is a history of events, notifications, and notes associated with an incident.

- Events include changes to the Assigned to, Assignment group, Status, Impact, and Urgency.
- Notifications include all system generated messages from KB attachment and setting of the status to Resolved.
- Notes include both Work notes and Additional comments.



Watch List

Add individuals to the watch list if you want them to receive a notification when there is an update.

Work notes list

Add individuals to the work notes list if you want them to receive a notification when there is a new work note.

Work Notes

Work notes are for you as a fulfiller to document efforts that were undertaken to resolve this issue. These notes will enter the activity feed when you press Post and are not visible to the caller (unless they are a fulfiller as well). Work notes are identifiable by the left yellow border.

Additional Comments

Additional comments are the primary way a fulfiller should communicate with the caller (unless you're already on the phone with them). Adding additional comments will trigger an email notification to the Caller containing the comments and link to the incident. The caller can choose to respond to the email message, which will update the Activity Feed with their response and/or they may provide comment via the Service Portal interface.

> **Pro Tip**: Use the [code][/code] tag to wrap around text to embed HTML. This should be used sparingly.

15. RELATED RECORDS TAB

The items in this tab allow this incident to be directly related to another incident, problem, or change records. These are important for correlation with Change Management records; however, currently Problem Management has not been implemented.

16. RESOLUTION INFORMATION TAB

The Close code and Close notes are required to resolve an incident. The close notes should be relative to why this incident is being resolved/closed (e.g., "the caller tried the suggested resolution, and it worked" or "the caller figured out the answer before a resolution could be found", etc.).

Resolved by and Resolved is auto populated at the time of saving the incident in the Resolved status.

IV. SERVICE CATALOG OVERVIEW

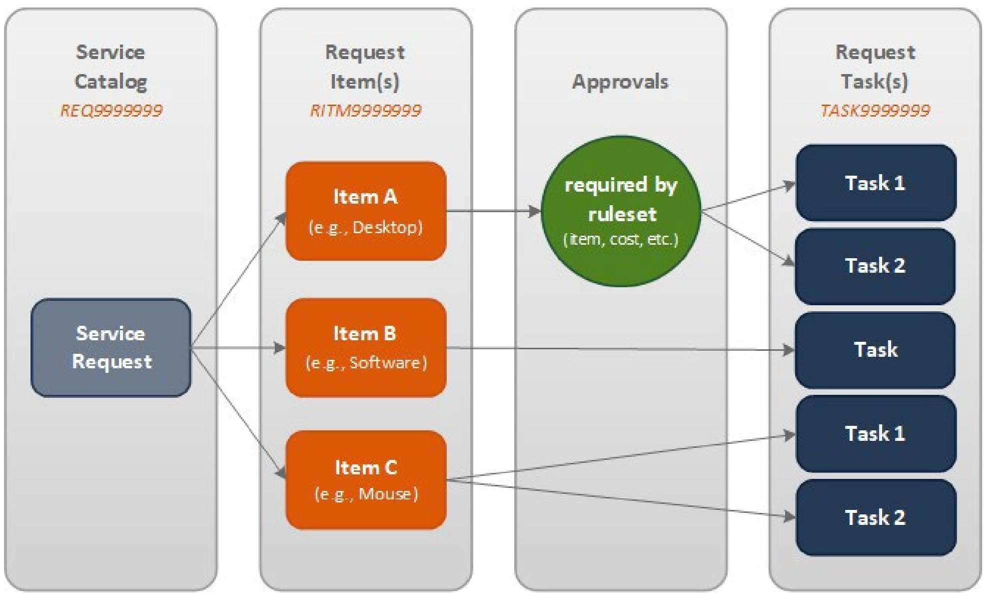
A. SERVICE CATALOG

The Service Catalog is comprised of Catalog Items and represent the full catalog of services offered by IT. Many of these services are available by default to university account holders, while others must be requested.

- Content Items – Pages of content describing a service, link to a KB article, or link to an external resource
- Request Items – Record producers, service requests, or change requests
- Order Guides – Multiple request items grouped together into a wizard-like step-by-step process

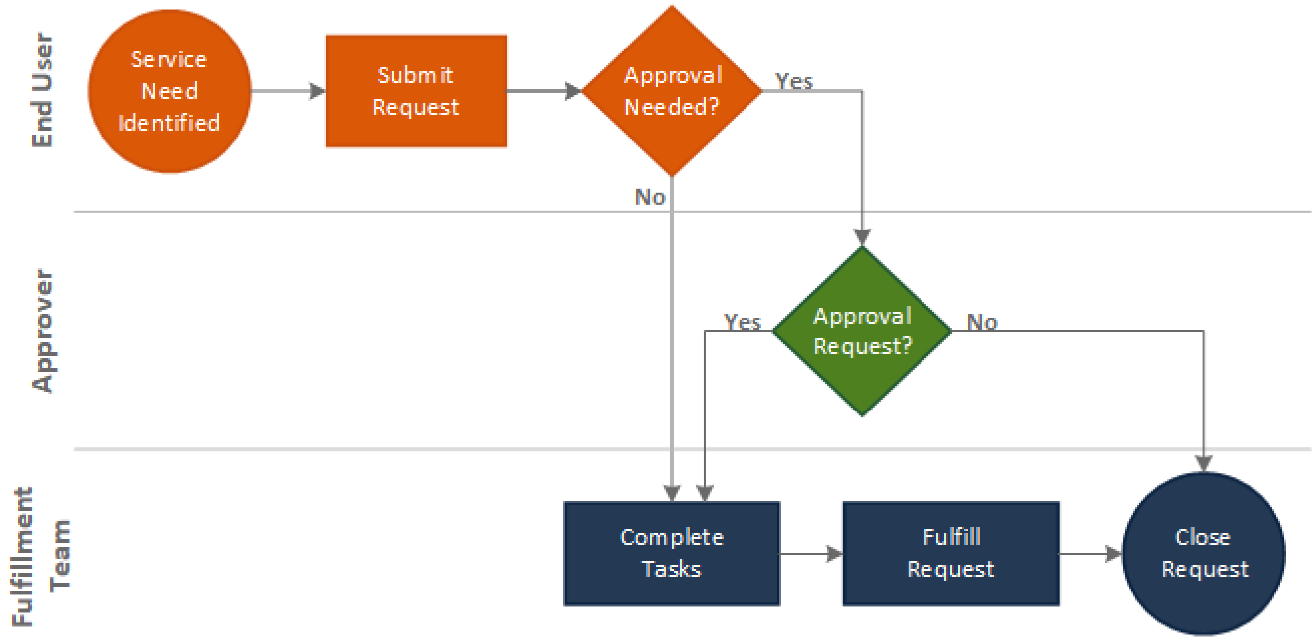
1. STRUCTURE OF A SERVICE REQUEST

A single request may have multiple request items. Each request item may require approvals and generate multiple simultaneous or sequential tasks.



2. REQUEST PROCESS FLOW

This is a high-level overview of the key activities in the Request Fulfillment process.



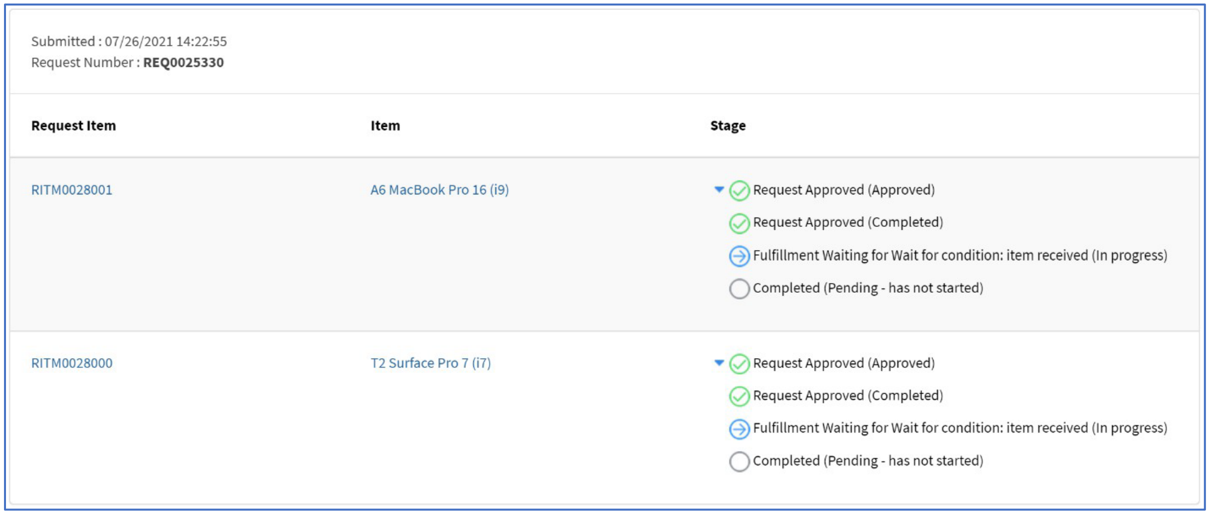
Workflows in ServiceNow

- A workflow is a process built into the tool that closely follows the business process steps. Based on answers to question in the Catalog Item for and the Catalog Item chosen, decision logic fires off approval requests and catalog tasks.
- Over time the Service Catalog will expand to include many more catalog items. Each item could potentially have its own workflow behind it.
- The three main roles – Requestor (End-User), Approver, and Fulfiller will always be present, but the actual steps and activities in the workflow may be different.

Requestor Tracking Fulfillment

Within the Service Portal select the My Items.

On the page listing of all your requests and incidents, select a request. On the detail page for that request, you can see the stage for each Request item.


Submitted : 07/26/2021 14:22:55
Request Number : **REQ0025330**

Request Item	Item	Stage
RITM0028001	A6 MacBook Pro 16 (i9)	Request Approved (Approved) Request Approved (Completed) Fulfillment Waiting for Wait for condition: item received (In progress) Completed (Pending - has not started)
RITM0028000	T2 Surface Pro 7 (i7)	Request Approved (Approved) Request Approved (Completed) Fulfillment Waiting for Wait for condition: item received (In progress) Completed (Pending - has not started)

3. CATALOG ITEM APPROVAL AND TASKS

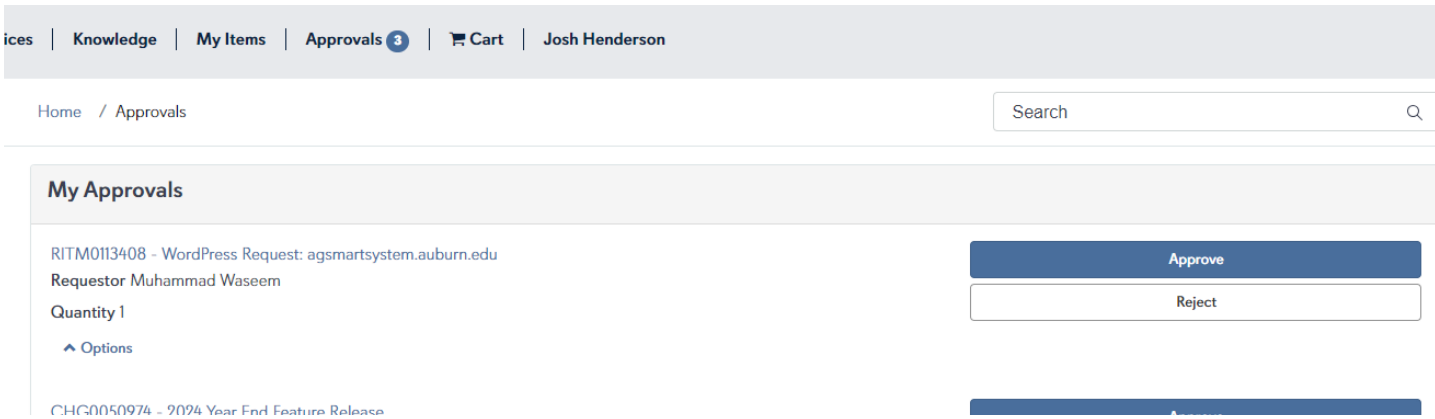
Based on the Workflow for a Catalog Item, ServiceNow will generate the following:

- One or more approval requests; based on the value of the item, purchasing policy, of other policies, it may be necessary to obtain one or more approvals from individuals
- Once the items have been approved (***if required***), fulfillment tasks are generated for Assignment Groups. this may include purchasing, release from a storeroom, software installation, set up, etc.

B. APPROVALS

Once an order has been placed, one or more approvals may be necessary. If the request not approved, the request is closed. If the request goes to multiple approvers, typically only one approval is required and the remaining approvals are no longer required. The workflow can be configured to require multiple levels or multiple approvals.

If you have any active (pending) approvals awaiting, you may access them directly from the Service Portal navigation or in the Now Platform (see My Approvals).



C. FULFILLER TASKS

Fulfillment tasks will be sent to various defined fulfiller groups for a particular requested item. Members of the assignment group will receive an email notification that a task has been assigned to the group.

The email will notify them that their group has a task waiting in My Groups Work. A member of the group should assign the Task to themselves or another member of the team. Once the task is assigned, the task will move to the individual. This can be accessed within the Now Platform at Self-Service > Homepage (ITIL Homepage) or at Service Desk > My Work. These have a list of open Catalog Tasks waiting to be worked on.

Click the task for details on the work that was assigned. Notes should be added to the Work notes area. Once the work has been completed, press the Close Task button at the top of the screen.

The requestor will be notified that their request has been completed.

> **Pro Tip**: Notifications are not sent to individuals that are considered "witnesses to the event" meaning if a task is assigned to me and I close the task, I will not receive a notification that the task was closed. If the task was assigned to a group but not an individual, when I close the task the group members will be notified but I will not.

V. WORKSPACES

Workspaces are targeted environments to provide the users the tools needed to perform their duties more efficiently. Most agents currently have access to the Agent Workspace and the CMDB Workspace. Additional workspaces are available out-of-the-box by ServiceNow but are limited to users with specific roles and only associated with specific applications. Custom workspaces for Auburn agents are being considered for development by the ServiceNow team.

A. AGENT WORKSPACE

The Agent Workspace was designed for a Service Desk environment where there is a general intake process, first-level triage, queues of workload, and second-level support available for engagement.

Interactions - An Interaction record is essentially a scratch pad for notes for an agent. Based on these notes, the interaction should be either:

a) Closed – all interactions should be closed but some require no other action because the encounter necessitated no engagement (e.g., wrong number, SPAM email, etc.)
b) Create an Incident – it was determined that service was interrupted and should be investigated
c) Create a (service) Request – the customer needs service (e.g., assistance, software license, etc.)
d) Create a Change Request – the customer identified the need to alter a service offering or change a system that would impact a service

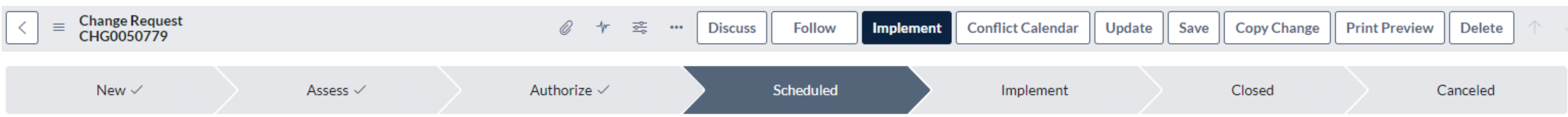
B. CMDB WORKSPACE

The CMDB Workspace is a central place for working with the CMDB. Use CMDB Workspace to search and explore the CMDB, examine health and recent activity, and access various CMDB dashboards and tools to support tasks.

VI. CHANGE REQUESTS

ITIL defines a “change” as the addition, modification, or removal of anything that could have a direct or indirect effect on services; therefore, some requests from the Service Catalog, specifically those that generate cause “changes”, will generate a Change Record (CHG9999999).

The fulfillment of a Change Request is a bit different than that of a Service Request. Just like Service Requests, there is at least one Task for fulfillment but the staged workflow for Change Requests is much more manual and deliberate as you can see in this screenshot.



Change Requests can be and most often will be generated directly from the platform to document work being done directly to configuration items.

A. 3 TYPES OF CHANGE REQUESTS

Change requests fall under three types: Standard Changes, Normal Changes, and Emergency Changes.

1. STANDARD CHANGES

A Standard Change is a low-risk, pre-authorized change that is well understood and fully documented, and which can be implemented without needing additional authorization.

- Low impact and low risk (which is always well understood)
- Repeatable and well-documented process with a high degree of success
- Relatively common and frequently occurring
- Authority granted in advanced (Pre-Approved by Change Manager/CAB)
- Does not directly alter user/business data

Examples

- Server patching or similar activity that is performed throughout the year
- OS updates
- DNS Changes

Required Notification / Approvals

- Auto Approved

Required Documentation (step-by-step documentation)

- Change Requests must be submitted through ServiceNow using a Standard Change Template

2. EMERGENCY CHANGES

A high-priority change that requires the bypassing of the normal change process to mitigate a production issue in the shortest possible time. Emergency changes fall within one of the following categories:

- Fix on fail or retroactive situations where the impact to service has already been experienced.
- Fix or fail situations where the impact to service is imminent if action is not taken.

Examples

- System breach by hackers
- Firewall changes in response to attack
- Response to exposure of critical system vulnerability
- Restore system/service crash

Required Notification / Approvals

- The requestor's manager or director required

Required Documentation (step-by-step documentation)

- Change request in ServiceNow
- Thorough information (in the change requests) that sufficiently explains the need and nature of the emergency change

3. NORMAL CHANGES

A Normal Change is a change that is not an emergency change or a standard change. Normal changes follow the defined steps of the change management process.

- Not auto approved
- Cannot be created after the event
- Must go through the CAB
- Requested and CAB-reviewed with enough lead time, depending on the risk level

Examples

1. Oracle DB Upgrade
2. Banner Upgrade
3. SharePoint Server Upgrade
4. Network hardware changes
5. Large scale changes or upgrades to various telecom systems

Required Documentation (step-by-step documentation)

- Change request in ServiceNow
- Thorough information (in the change requests) that sufficiently explains the impact of the normal change

B. CHANGE MANAGEMENT

The process of managing configuration item changes across the institution falls under the oversight of the Change Manager. The Change Manager leads the Change Advisory Board (CAB), which meets weekly to review Normal Changes submitted for consideration and Emergency Changes that have taken place.

Auburn's Change Management implementation leans heavily on ITIL best practices but has been modified to consider the institution's concerns, consultation from peer institutions, direction from administration, and feedback from our IT professionals. The Change Management process may continue to evolve over time.

VII. KNOWLEDGE MANAGEMENT

What better way to help someone then allowing them to help themselves? Sharing of knowledge is an incredible tool to empower our user community and off-load the call volume of our IT Service Desk and IT Professionals for simple-to-solve issues. Difficult tasks and non-routine processes are great examples when good documentation really comes in handy, especially during the transition of personnel.

ServiceNow currently accommodates 21 knowledge bases and 823 articles. Some of the knowledge bases are available to the public and some you must belong to a specific Banner division code (i.e., a specific College or division), a ServiceNow support group, or a user group (i.e., students only) to even see.

A. KNOWLEDGE BASE CREATION AND SETTINGS

To request a Knowledge Base, use the ServiceNow catalog item, choosing the request type Knowledge Base Creation.

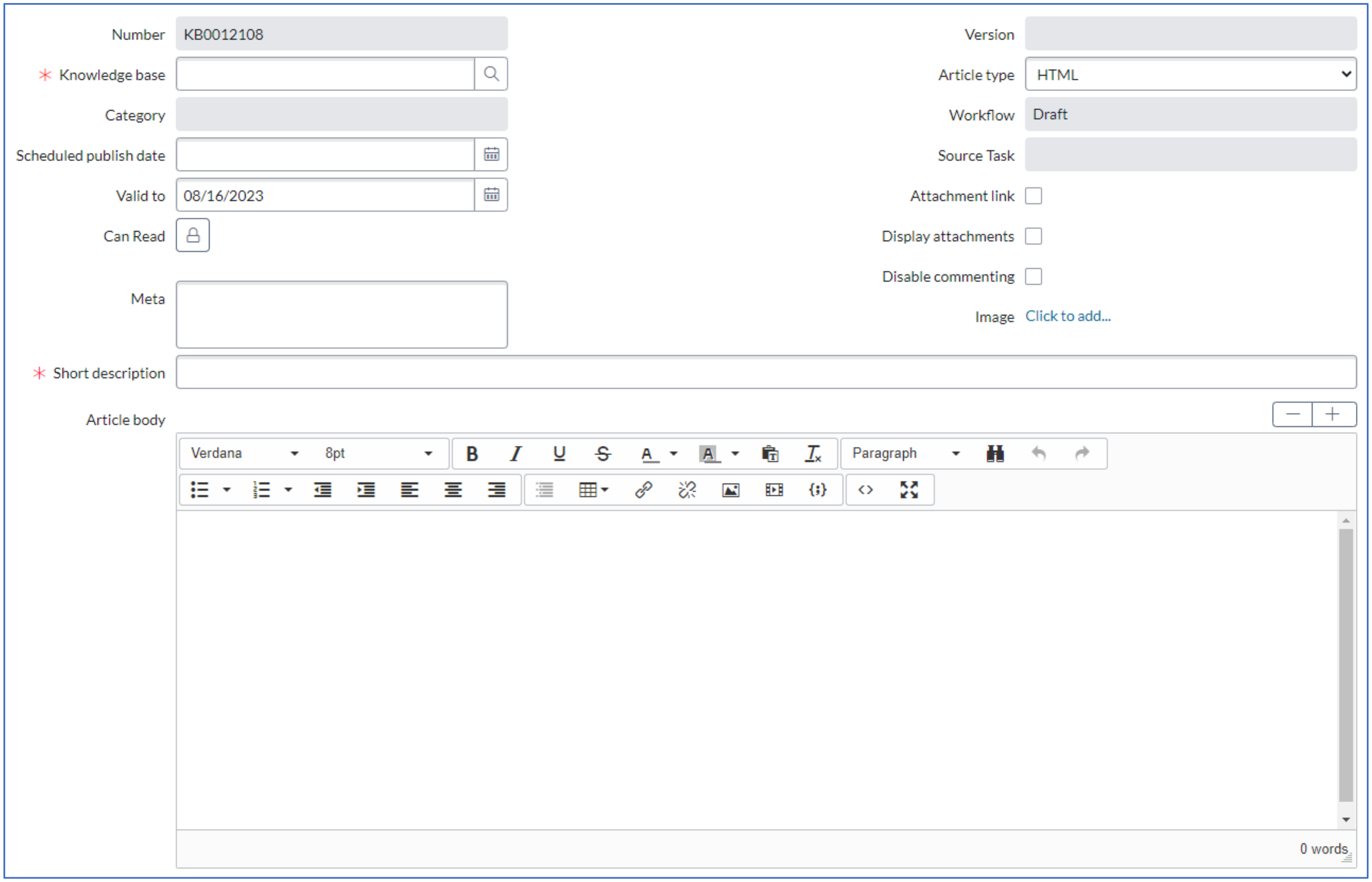
Publishing and retiring of articles allow the option to require KB Manager approval or allows immediate action without approval. You also can restrict who has access to the KB and who can contribute/update articles to the KB.

B. CREATING KB ARTICLES

Creating a KB Article is a simple process.

1. Enter knowledge into the filter navigator and click Create New in the Knowledge application.
2. While the only required fields are the Knowledge base and Short description, producing a quality article means providing as much data as possible. If you forget what each field means, hover your cursor over the title for a pop-up description.

3. Knowledge articles can only live in one KB at this time. Select the correct Knowledge base, knowing that this article will inherit its publishing, retiring, and visibility settings. Unless the knowledge is specific to a sub-population, consider putting it in the Information Technology KB.
4. Categorizing KB help the community find the content.
5. Scheduled publish date allows you to set a future date for a KB article to be released.
6. All knowledge expires and must be reviewed for accuracy and relevance. The Valid to date should be selected for a time when the article could be reviewed. When the date arrives, the article will no longer be visible within the Portal until the date is extended into the future.
7. Can Read allows you to select a user criteria that defines a population of individuals more narrow in scope than that defined for the KB in which the article resides. (Ex. The KB is only visible to the College of Education, perhaps this article should only be visible to Education IT)
8. Article type should most often be left as HTML. Wiki is the alternative, but formatting is limited.
9. Images embedded in the Article body are saved as attachments. If you don't want these shown in the separate attachment panel, uncheck the Display Attachments option. You may want to attach a file for download to a KB article. In that case this box should be checked.
10. You can choose to allow commenting per article.
11. Image is not used for most articles; however, you can see how it can be used on the Service Portal homepage for News articles.


Number
KB0012108
Knowledge base
Category
Scheduled publish date
Valid to
08/16/2023
Can Read
Meta
Version
Article type
HTML
Workflow
Draft
Source Task
Attachment link
Display attachments
Disable commenting
Image
Click to add...
Short description
Article body
Verdana
8pt
Paragraph
0 words

VIII. REPORTING OVERVIEW

Several hundred reports are available out of box so there is likely one there you already need or want: however, if you want to create a new report, the process is easy to follow, and the options are numerous.

A. REPORT TYPES

Data can be represented in ServiceNow through a variety of report views.

Tabular

Tabular charts allow you to organize data using multiple dimensions. Define rows, columns, and other dimensions based on the chart type.

(Types: multi-level pivot table, map, heatmap, bubble)

Columns/Bars

Column and Bar charts are typically used best for comparisons and distribution charts. When you use the "stacking" options, Column and Bar charts are also used to visualize "compositions".

(Types: bar, horizontal bar, pareto, histogram)

Time Series

Time series charts are used to visualize data over time. When using the group option in time series charts you can compare multiple items over time.

(Types: trend, line, area, spline)

Pies/Donuts

Pies and Donuts are simple visualizations of "shares of a total". Pie and Donut charts work best if no data is filtered out (100%) and there are less than 7 shares to visualize.

(Types: pie, donut, semi donut)

Scores

Scores are visualizations of a single data point.

(Types: speedometer, dial, single score)

More

There are even more chart types to choose from. Pick and choose a chart type.

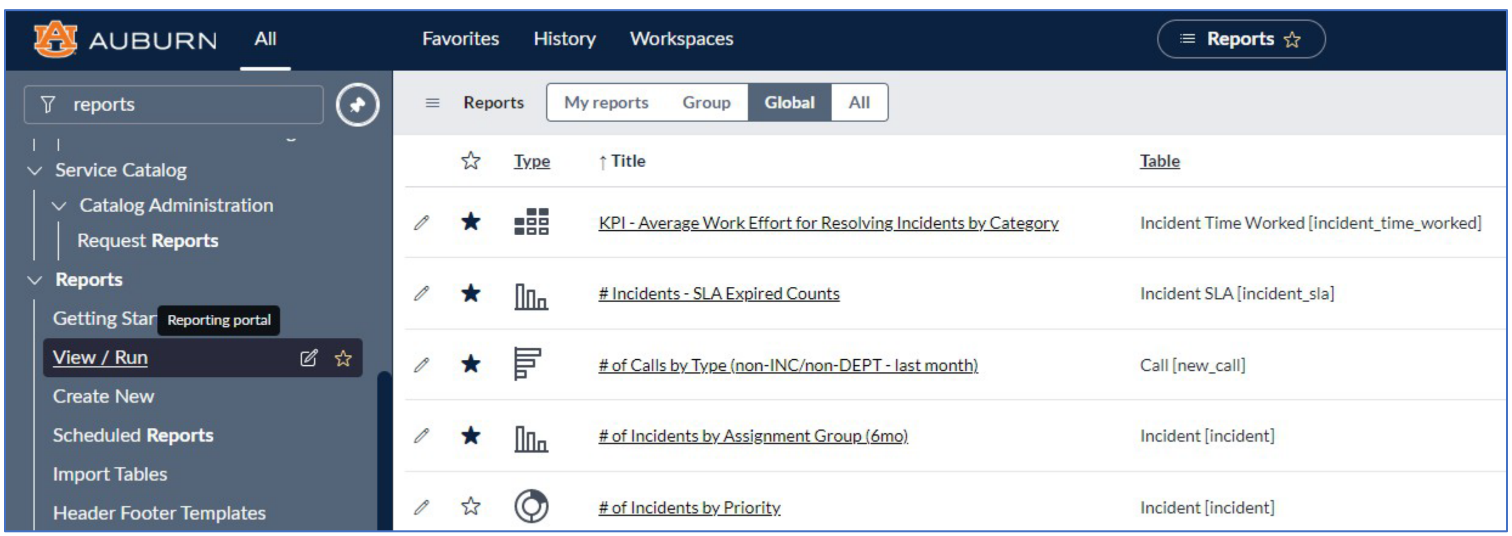
(Types: list, calendar, pyramid, funnel, box, trendbox, control)

B. 3 WAYS TO PRODUCE REPORTS

1. Reports can be created from Record Lists
2. Reports can be viewed or modified from existing Out of Box Reports
3. New Reports can be produced using the built-in report generator

C. REPORTS – APPLICATION & MODULE

In the All menu, select Reports or filter to find it faster. Then, select the View / Run module. By default, My reports will be selected. Likely, you don't have any yet so click Global.



D. USING REPORTS

Once you have created a new report or tweaked an Out of Box report you'll get to the final Share button. Usually, you'll want to add this to your dashboard, but you may also want to share it with others, such as one of your groups.

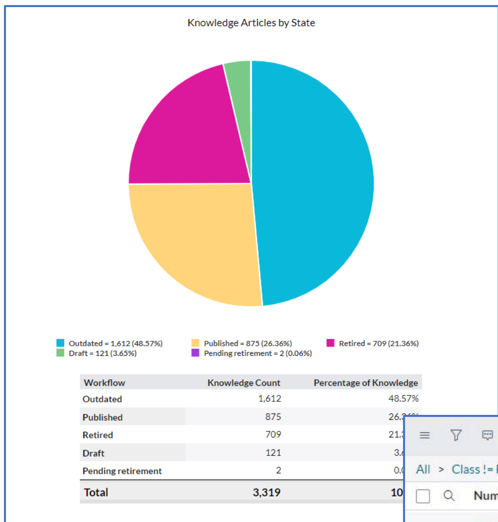
E. REPORTS VS. PERFORMANCE ANALYTICS

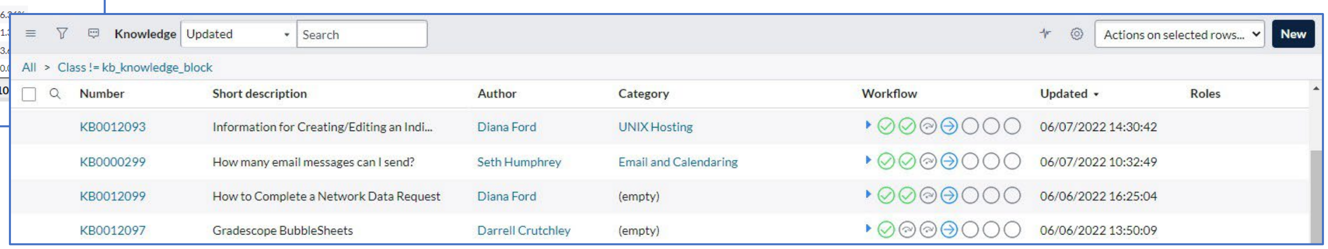
Reports represent data at that specific moment in time. Performance Analytics track data over time and can show trends.

F. HOMEPAGES AND GAUGES

A ServiceNow homepage (found in the Self-Service application) provides a dashboard of frequently used content which usually includes reports

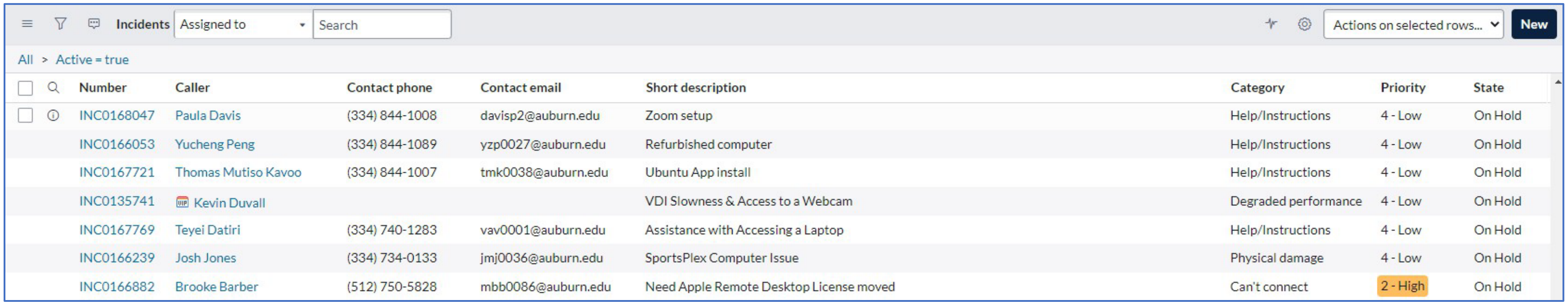
A gauge is a mapped graphic image on a homepage; when you click on a section of a graph, it links to the list of the records specific to that piece of the graph.





IX. FINDING STUFF

A. LISTS



Starting at the top left of the previous screenshot, here is a description of that list.

Title	Description
List Context (hamburger menu)	Open the context menu for the list view
Funnel icon	A powerful custom results filter
Natural Language Filter	Hide/Show the Natural Language Filter
List Search	Filter the list results by the criteria in the dropdown list and the values searched
Activity icon	Opens the activity feed for all visible records
Gear icon	Opens the Personalize List Columns modal so you can customize which columns are display for you in this list view
Bulk Actions	Choose a bulk action to perform on records selected

New	Button used to create a new record
Current Filter	A string showing how the data is currently being filtered; click a string before the > sign will remove all filters to the right of it
Check box	Used to select all currently visible records for bulk actions
Magnifying Glass	Toggles the column search filter boxes visibility
Column Names	These can be clicked to sort the records according to that column
Column Context (three dots)	A bunch of options to sort, create visual task boards, initialize reports, etc.
Check box	Used individual record selection for bulk actions
Info icon	A quick view of the record
Data Links	Any data that has an underline can be clicked to view more information about it
Arrows	Navigation through the pages of records
Pages of Records	Displays the number of pages of records

B. SEARCHING

- Global Search – at the top right of the screen you can search the entire Now Platform for the string you're interested in
- List Search – search specifically in the list you're viewing and yield results from the one field definition and value combination
- Column Search – search for values matching within that column of data
- Custom Results Filter – allows for numerous combinations to narrow the list of results

Pro Tip: the first three search methods above can be enhanced by using the AND operator to allow multiple valid queries (OR is not supported)

C. SEARCH: SEARCH LISTS

Many modules have data formatted into lists with search boxes at the top of each column of information. These can be used to narrow the data that is being returned. Knowing how to use these well can increase your efficiency within the Now Platform. Use this chart to help you.

Wildcard Search Syntax	How the Search Works
*mySearchTerm	Contains
mySearchTerm%	Starts with
%mySearchTerm	Ends with
!*mySearchTerm	Does not contain
=mySearchTerm	Equals
!=mySearchTerm	Does not equal
mySearchTerm No leading or trailing Wildcard(s)	Greater than or equal to ***mySearchTerm***