ServiceNow: Fulfiller Basics

https://aub.ie/snowtraining_fb

AUBURN UNIVERSITY
OFFICE OF INFORMATION TECHNOLOGY

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Introduction

What is ServiceNow?

ServiceNow is the easy-to-use strategic platform selected to organize and manage Auburn University's IT Service Management (ITSM) efforts. ServiceNow is based on the Information Technology Infrastructure Library (ITIL) framework, which is the most widely accepted approach to ITSM. ITIL training is available within the Lynda.com catalog of courses.

Using a common, extensible database called the Configuration Management Database (CMDB) ServiceNow branches interconnectedly into IT Operations Management and IT Business Management.

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

What is a fulfiller?

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

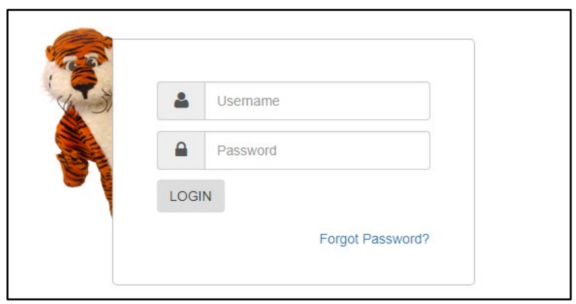
ServiceNow Links

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

General Navigation

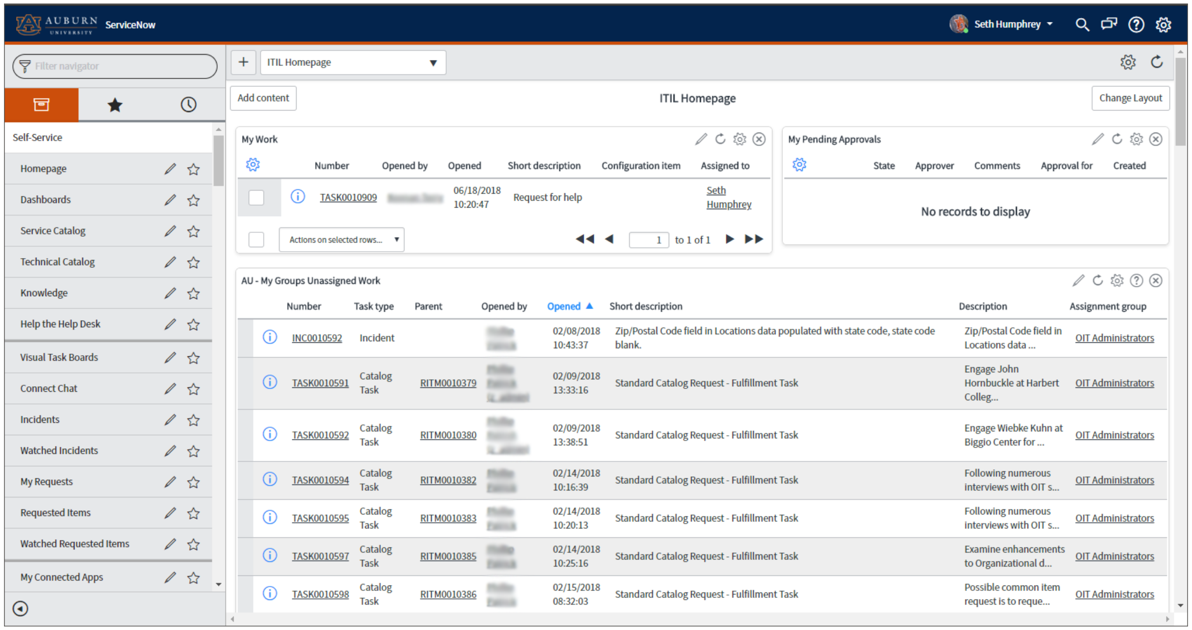
Logging into ServiceNow

The Now Platform (https://auburn.service-now.com) uses AUthenticate for Single Sign-On. To log in, use your Auburn username and password.



Main Homepage

This is the homepage you will see when you log into the Now Platform. We'll give a quick overview and dive into some areas more deeply.



Content Frame

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, homepages, 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).

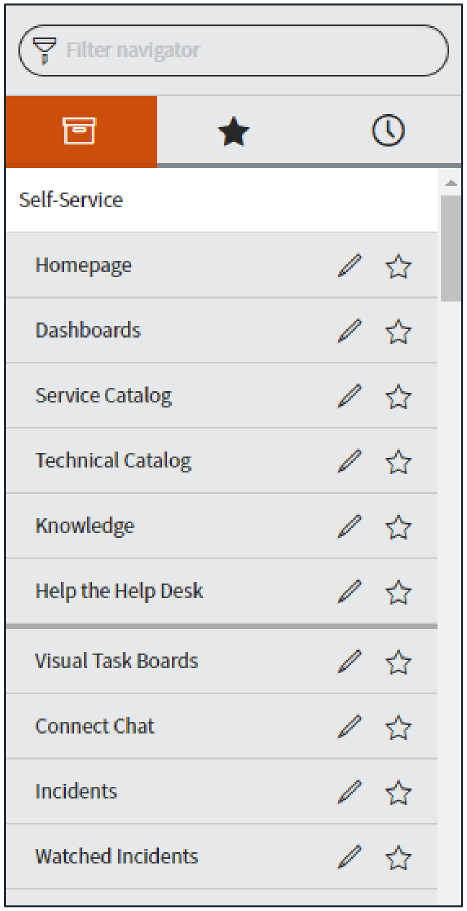
Banner Frame

Running along the top of the page is the Banner Frame.

The Banner Frame contains the Auburn logo, the avatar and name of the logged in individual, global search, Connect Chat app, help (contextual embedded help and external help links), and a link for user-definable settings.

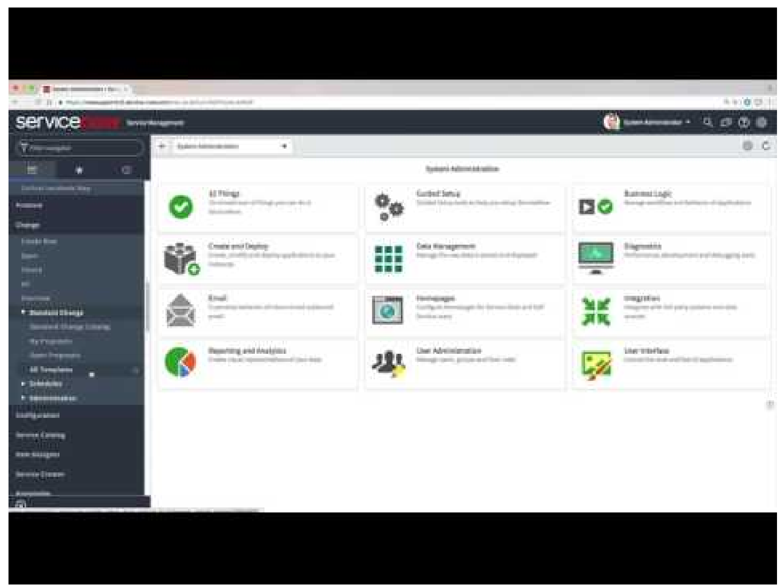
Application Navigator

To the left is the Application Navigator.

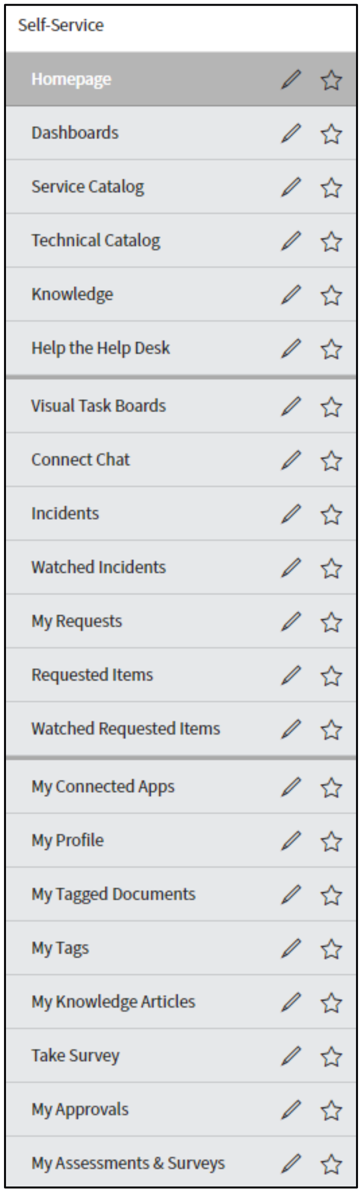


Title	Description
Filter Navigator	Helps individuals quickly access information and services by filtering the items in the application navigator or opening forms and lists directly.
Application	A group of modules or pages, that provide related information and functionality in a ServiceNow instance.
Modules	Appear as links under each application’s navigation bar heading. They have the purpose of presenting the functionalities that make up an application.
Favorites	Clicking the star next to any application or module adds it to your favorites, which can be found by the large star at the just below the Filter Navigator. Your favorites are synced for easy access within the mobile app.

This video introduces many of the Application Navigator features: aub.ie/appnavigator.



Self-Service Modules



The Self-Service application and its modules are only available to fulfillers with the ITIL role. Fulfillers will spend the majority of their time within these modules.

Homepage

The homepage has numerous preset defaults to help you be more efficient and give the information you need readily available to you from one screen. These homepage layouts can be accessed from the dropdown at the top of the page and each of these can be customized by you to fit your needs best. The default homepage most fulfillers should start with is **ITIL Homepage**.

On the ITIL Homepage tasks, approvals, incidents, and requests assigned to you or your group(s) will be displayed.

Dashboards

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

Service Catalog and Knowledge

While the Service Catalog and Knowledge can be accessed through the Self-Service application and is functional, it has been optimized for the Service Portal experience.

Visual Task Boards

These Kanban 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. Task Boards can be data driven using filters to show specific information or they can be a freeform board where you create private tasks for yourself.

Pro tip: save your task boards you'll use frequently as a favorite for quick access.

Connect Chat

An internal chat client. Incidents can be added to your chat so you can be notified when there is an update that you may need to follow-up on. You can even have a Connect conversation linked to your taskboard.

Incident Management

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 standard 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.

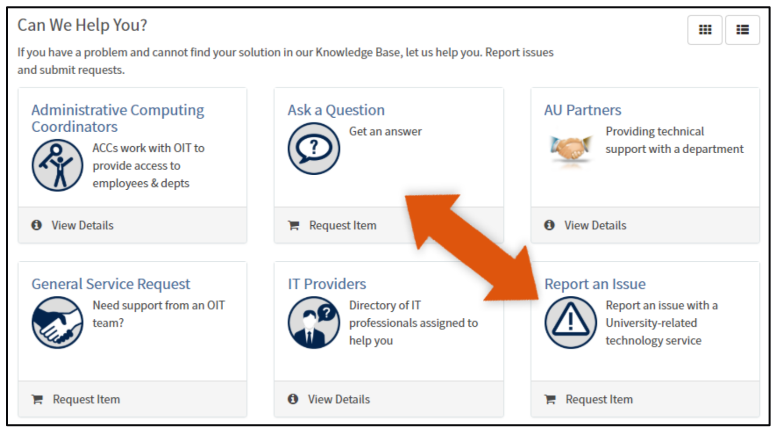
Check out this video that demonstrates a broad overview of Incident Management and introduces Problem Management: aub.ie/incidentmgt

User Information and Assignment Groups

- Every night user account information is imported from Active Directory and eDirectory
- Fulfillers have been placed into Assignment Groups populated from AD groups
- All central IT Assignment Groups have been given the ITIL role in the ServiceNow tool, which allows them to access and work on Incidents, Configuration Items, Service Requests, and Reports
- Assignment Groups will be managed by the ServiceNow team via requests from the department manager

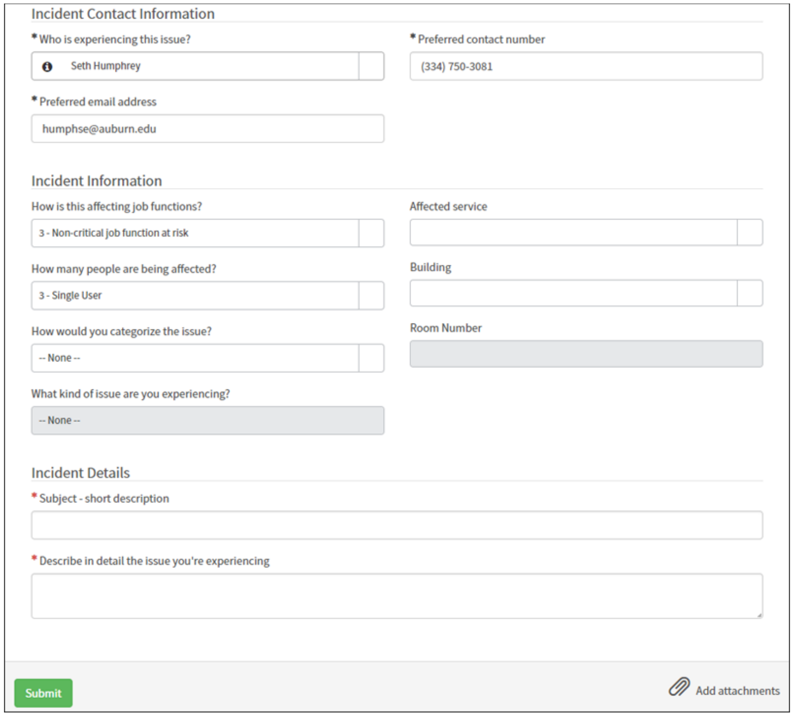
Creating an Incident (End-User Perspective)

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 **Can We Help You?** section on the OIT homepage is a shortcut to a category within the Service Catalog designed to put the end-user in contact with a person to assist them. To contact the SD, an individual may select **Ask a Question** or **Report an Issue**.



Ask a Question is a very simple form that starts an inquiry with the SD. These generate a **Call** record. The SD may choose to categorize that call and it's done, or the SD Analyst may escalate that call into an **Incident** when he/she determines it requires further interaction with the individual because something is broken.

Report an Issue gathers significantly more information and immediately generates an **Incident** that is assigned to the SD group.



Incident Contact Information

* Who is experiencing this issue?
Seth Humphrey

* Preferred contact number
(334) 750-3081

* Preferred email address
humphse@auburn.edu

Incident Information

How is this affecting job functions?
3 - Non-critical job function at risk

Affected service

How many people are being affected?
3 - Single User

Building

How would you categorize the issue?
-- None --

Room Number

What kind of issue are you experiencing?
-- None --

Incident Details

* Subject - short description

* Describe in detail the issue you're experiencing

Submit

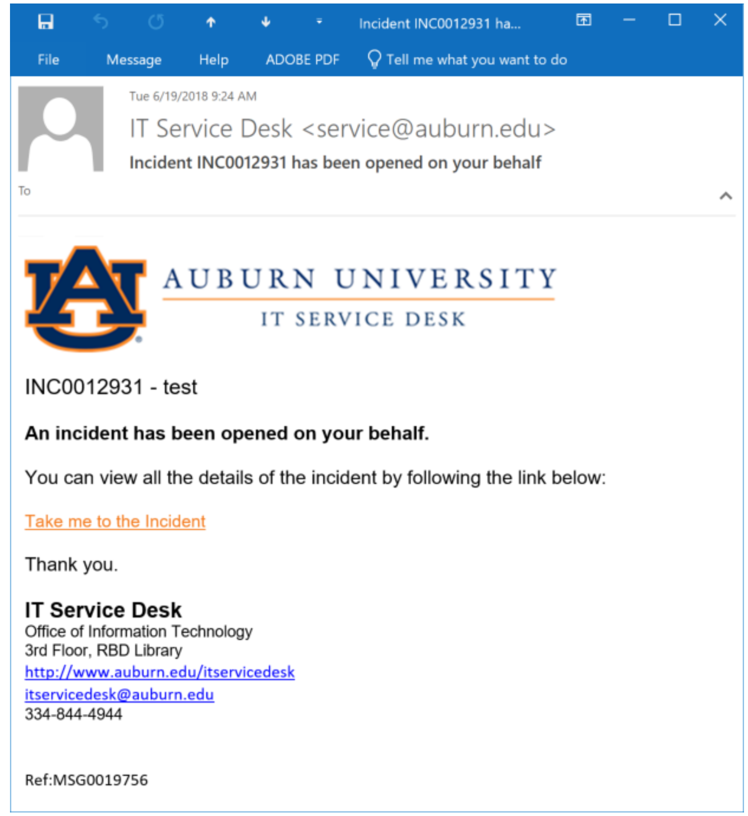
Add attachments

At a minimum, the requestor has to enter contact information and incident details; however, to better assist the SD in troubleshooting and routing of the issue as much information that can be entered the better.

How is this affecting job functions? equates to **Urgency** and **How many people are being affected?** equates to **Impact**. More on these terms later.

How would you categorize the issue? equates to **Category** and **What kind of issue are you experiencing?** equates to **Subcategory**.

As when all Incidents are created, the **Caller** is sent a notification that an Incident has been opened on their behalf.



Incident INC0012931 ha...

File Message Help ADOBE PDF Tell me what you want to do

Tue 6/19/2018 9:24 AM

IT Service Desk <service@auburn.edu>

Incident INC0012931 has been opened on your behalf

To

AUBURN UNIVERSITY
IT SERVICE DESK

INC0012931 - test

An incident has been opened on your behalf.

You can view all the details of the incident by following the link below:

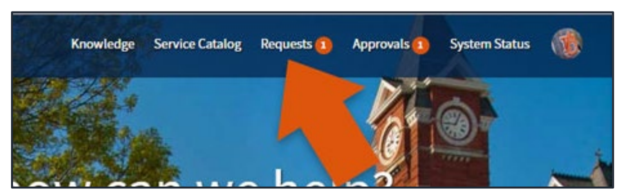
Take me to the Incident

Thank you.

IT Service Desk
Office of Information Technology
3rd Floor, RBD Library
http://www.auburn.edu/itservicedesk
itservicedesk@auburn.edu
334-844-4944

Ref:MSG0019756

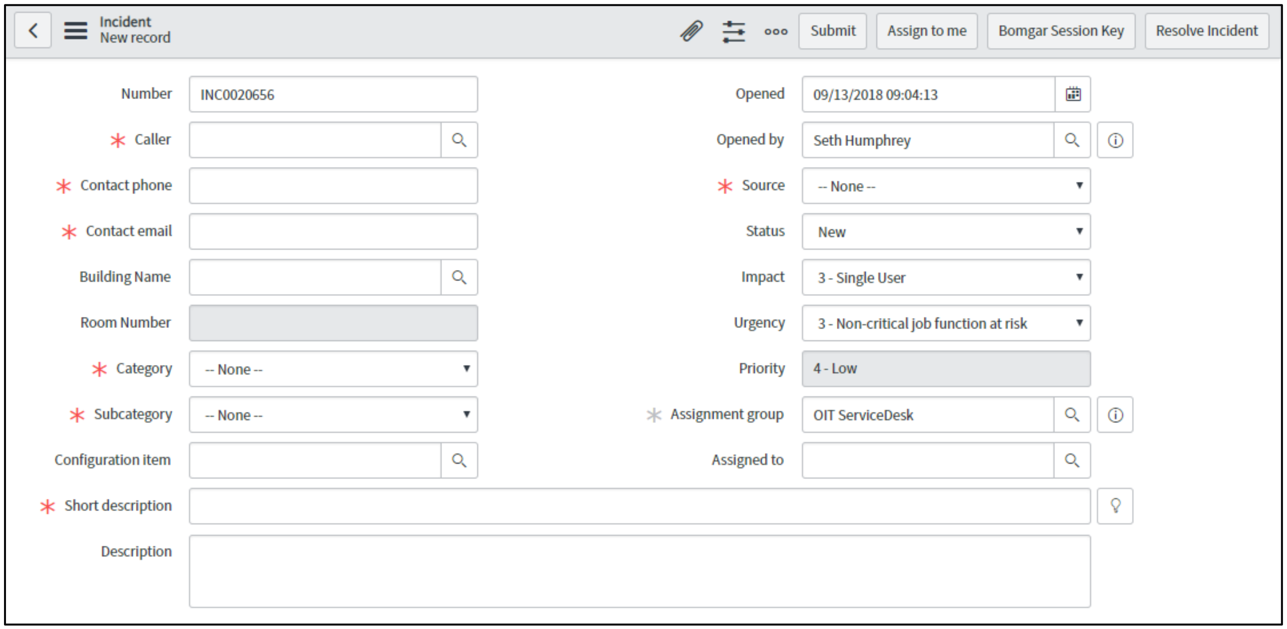
End-users can check the status of their Incidents and Requests through the Service Portal.



Creating an Incident (Fulfiller Perspective)

To create a new incident record:

1. Log into the Now Platform
2. Use the Filter Navigator to search 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
5. Press the **Submit** button



Number

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

Caller

This is the individual that is having the issue. **Pro Tip:** search by username 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.

Contact Phone and Contact Email

These data fields augment the user record table to provide contact information for the caller that regularly monitored, which may be different than the information imported from the nightly data pulls.

Category and Subcategory

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

Configuration Item (Affected Service)

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.

Building Name and Room Number

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

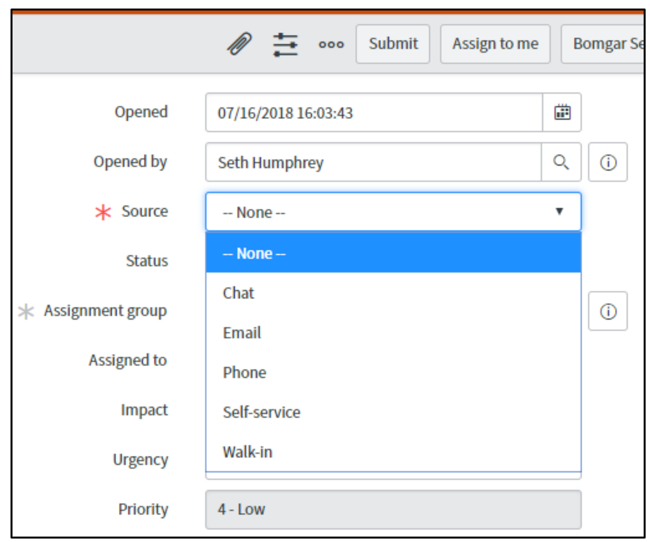
Opened and Opened By

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

Source

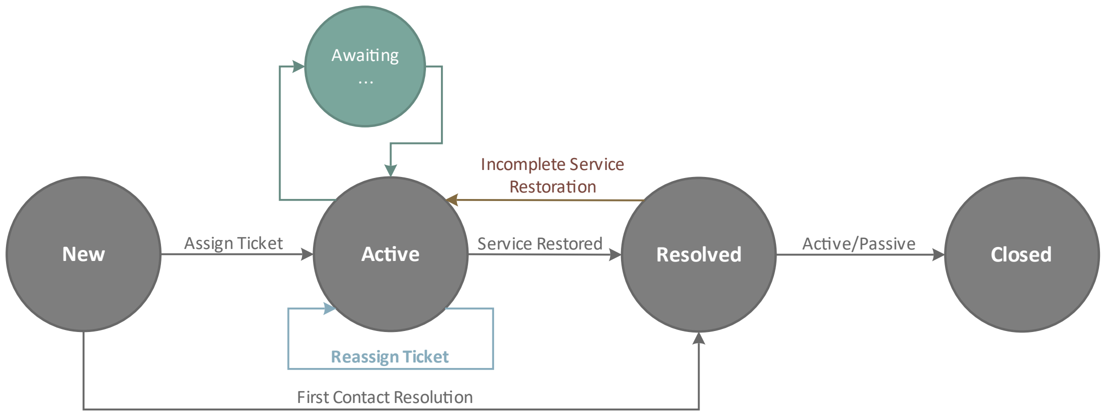
Select the method by which the caller initiated contact.

Value	Definition	How the value is set
-- None --	Default option when creating an incident from within the Now Platform.	Default
Chat	Individual initiates a chat through the Bomgar chat client.	Manually set
Email	Individual emails servicedesk@auburn.edu	Manually set
Phone	Individual calls the IT Service Desk at 844-4944	Manually set
Self-Service	Individual uses the Service Portal to ask a question or report an issue	Automatic
Walk-In	Individual visits the IT Service Desk at the RBD Library	Manually set



Status (Incident Lifecycle)

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



State	Description
New	The default state of all incidents before it has been saved.
Active	Once an incident has been assigned and saved, the record automatically converts to the **Active** state while it is being handled or waiting to be picked up.
Awaiting Problem	Setting this on hold state manually signifies that a large problem exists and resolution for this ticket is pending a solution or workaround for a problem. The **Awaiting Problem** state pauses the SLA clock.
Awaiting User Info	A fulfiller may choose to set the state to **Awaiting User Info** while he/she is waiting for the caller to provide more information to help troubleshoot the issue. Fulfillers may want to **Follow** these incidents so they will be notified when the caller responds. This on hold state also pauses the SLA clock.
Awaiting Evidence	**Awaiting Evidence** is manually set by a fulfiller when the incident requires further investigation into what may be happening. This doesn't necessarily indicate the status of troubleshooting the issue. This on hold state pauses the SLA clock.
Resolved	**Resolved** means a solution has been discovered and communicated with the caller. 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 caller has 24 hours to respond to the proposed resolution before the incident automatically continues to the **Closed** state.
Closed	Once an incident is in the **Closed** state it should no longer be updated. The **Activity Feed** and most fields will not be editable.

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	P5 - Planning

Service Level Agreements (SLA)

An SLA defines the agreed upon level of service availability. Specifically, in regards to Incidents, the 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). OIT 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 "Awaiting …" since this means the problem is being addressed. The SLA clock stops at resolution.

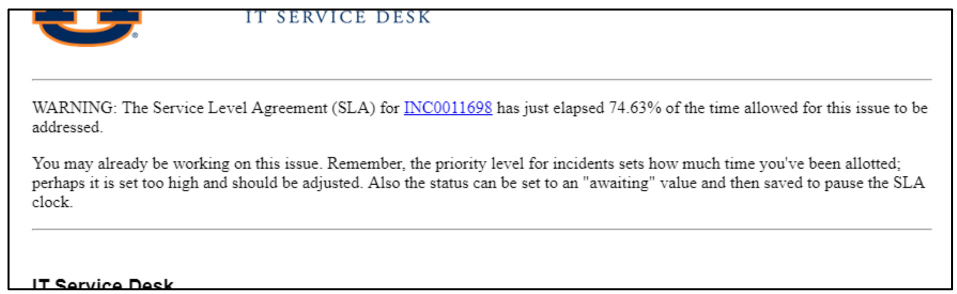
Failure to meet an SLA (duration has expired) should be investigated to determine if the appropriate Priority level was assigned, workloads are properly balanced, notifications are given proper attention, etc. to help address why the time duration was not met and prevent future expirations.

Name	Duration	Schedule
Priority 1 - Response	TBD	TBD
Priority 1 - Resolution	4 hrs	8-5 weekdays, excluding holidays
Priority 2 - Response	TBD	TBD
Priority 2 - Resolution	8 hrs	8-5 weekdays, excluding holidays
Priority 3 - Response	TBD	TBD
Priority 3 - Resolution	24 hrs	8-5 weekdays, excluding holidays
Priority 4 - Response	TBD	TBD
Priority 4 - Resolution	40 hrs	8-5 weekdays, excluding holidays
Priority 5 - Response	TBD	TBD
Priority 5 - Resolution	56 hrs	8-5 weekdays, excluding holidays

SLA Notifications

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

% of SLA	Type	Notification Sent To
50% / 75%	SLA Warning	Fulfiller Assigned to Incident
100%	SLA Failure	Fulfiller Assigned to Incident Fulfiller's Supervisor



IT SERVICE DESK

WARNING: The Service Level Agreement (SLA) for INC0011698 has just elapsed 74.63% of the time allowed for this issue to be addressed.

You may already be working on this issue. Remember, the priority level for incidents sets how much time you've been allotted; perhaps it is set too high and should be adjusted. Also the status can be set to an "awaiting" value and then saved to pause the SLA clock.

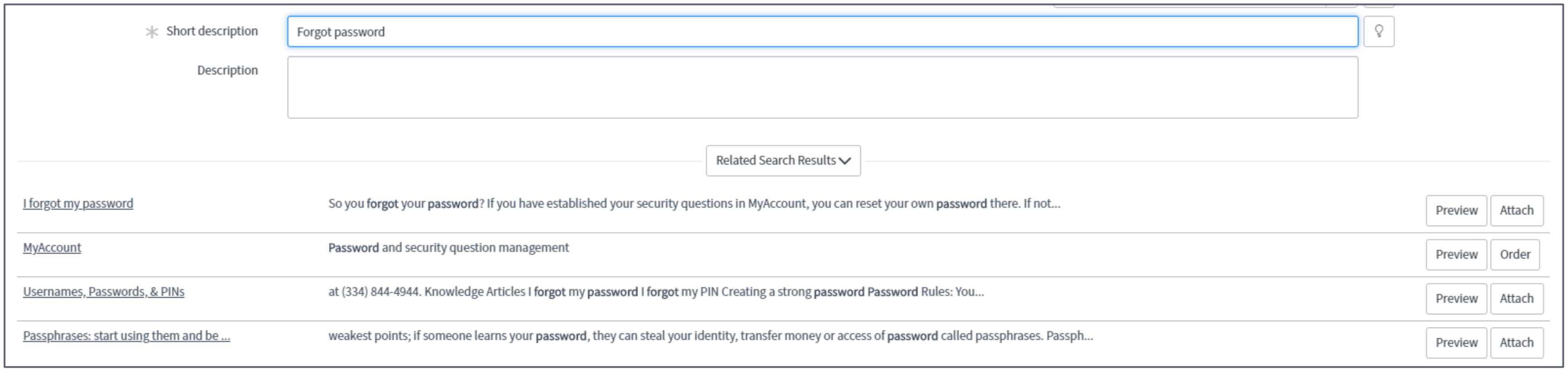
IT Service Desk

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 fulfiller. Incidents may be routed directly to fulfillers but this is considered a bad practice unless you know that person is available to work the issue. The **Assigned to** selections represent the assignment group membership.

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 the caller the KB article and posts it into the Activity Feed.



Notes Tab

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

Activity Feed

The activity feed is a history of events, notification, 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 to that particular incident.

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 added.

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). Additional comments and Work notes share the same space and can be toggled between the two by the check box below. Adding additional comments, the caller receives an email notification containing the comments as well as a 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.

Related Records Tab

The items in this tab allow this incident to be directly related to another incident, problem, or change record. Once OIT incorporates the Problem Management and Change Management applications into production these will be in play. For now, we won't use these.

Resolution Information Tab

The **Close code** and **Close notes** are required to resolve an incident. The close notes should be note 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.

Checking the **Knowledge** option creates an unpublished KB article. The **short description** is the title of the KB article and the body of the article consists of all the **additional comments** in the activity feed.

Service Catalog Overview

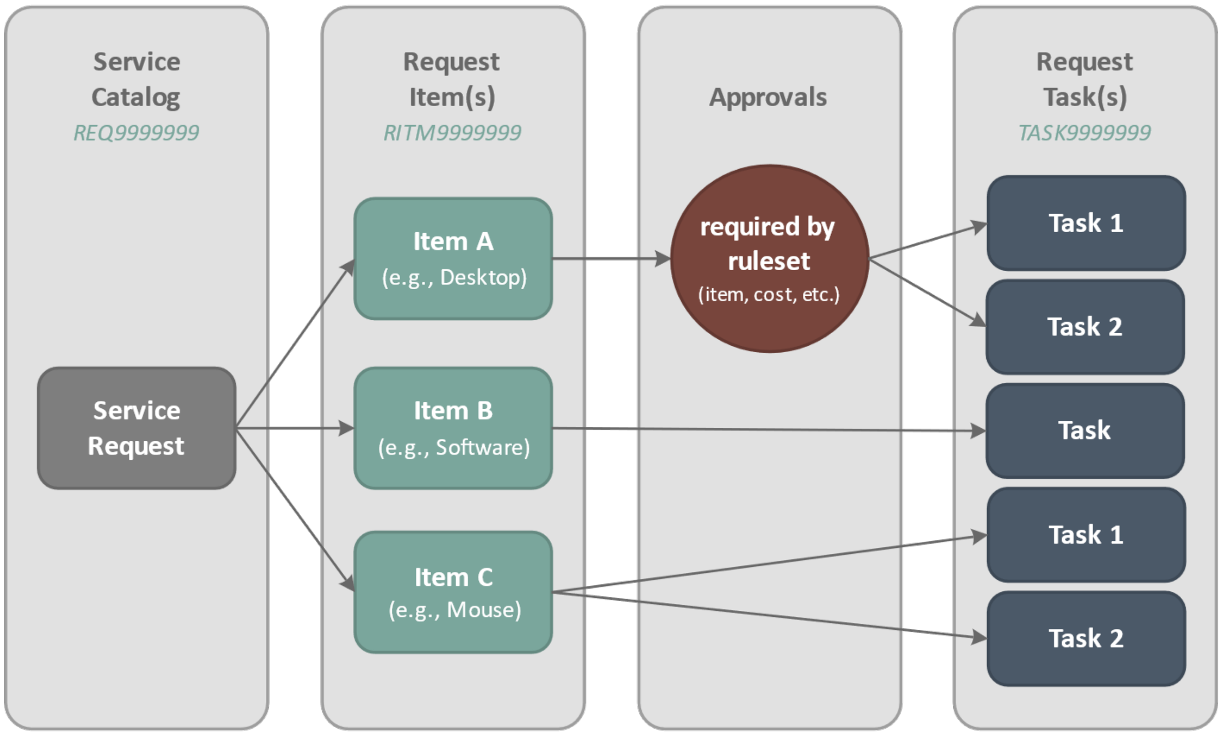
Service Catalog

While the Service Catalog is available within the Now Platform, it is suggested you use the Service Portal. Each item in the Service Catalog is called a **Catalog Item**. These catalog items come in different flavors (content items, request items, order guides) and represent the full catalog of services available to by central IT. Many of these services are available by default to Auburn University account holders, while others must be requested.

- Content Items – These may be pages of content describing the service, link to a KB article, or link to an external resource
- Request Items – These may be record producers, service requests, or change requests
- Order Guides – Groups multiple request items together into a wizard step-by-step process

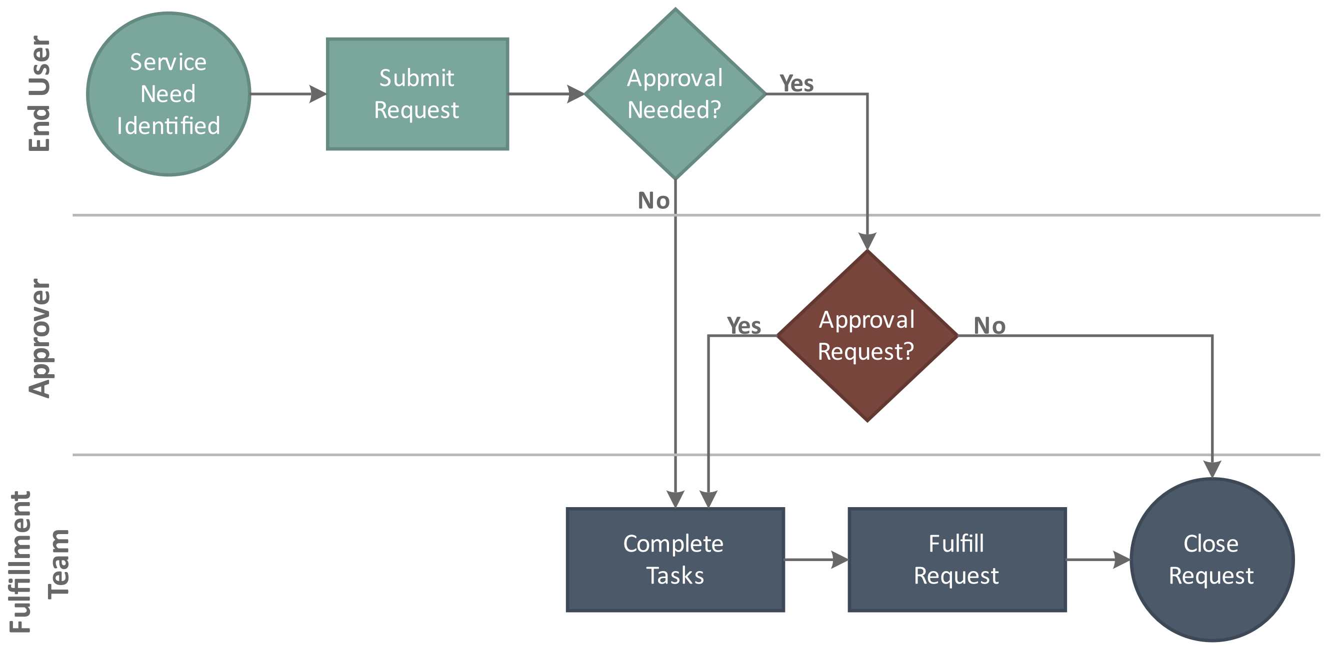
Structure of a Service Request

A single **request** (REQ9999999) may have multiple **request items** (each with a unique ID, ex. RITM0010459). Each request item may generate multiple simultaneous or sequential **tasks** (each with a unique ID, ex. TASK1234567). Some of these tasks may require **approvals**.



Request Process Flow

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

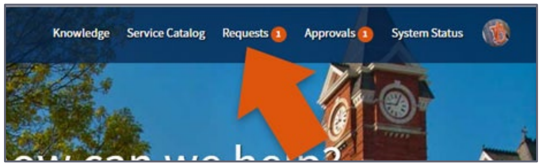


Workflows in ServiceNow

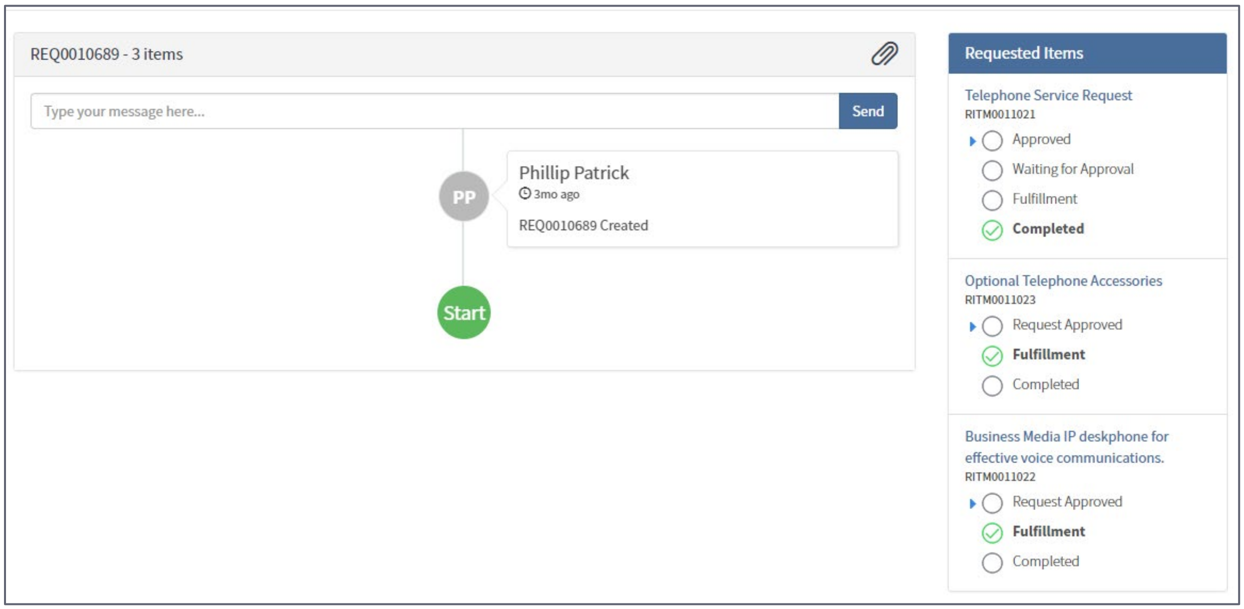
- A workflow is a process built into the tool that closely follows the business process steps. Based on answers to question in the Catalog Item for and the Catalog Item chosen, decision logic fires off approval requests and catalog tasks.
- Over time the Service Catalog will expand to include many more 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 **Requests** element and choose **View all requests**.



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**.



Catalog Item Approval and Tasks

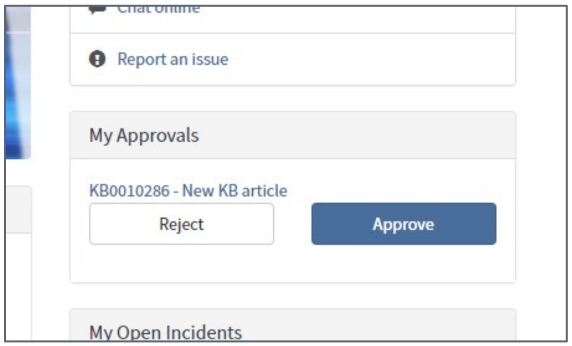
Based on the Workflow for a Catalog Item, ServiceNow will generate the following:

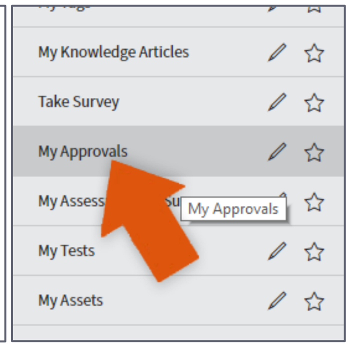
- One or more approval requests; based on the value of the item, purchasing policy, of other policies, it may be necessary to obtain one or more approvals from individuals
- Once the items have been approved (if required), ServiceNow generates Fulfillment tasks to various Assignment Groups; this may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

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 number of approvals.

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





Fulfiller Tasks

Fulfillment tasks will be sent to various defined fulfiller groups for a particular requested item. Members of the assignment group will receive 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. The status for a task you're working should be changed to **Work in Progress** and saved. 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.

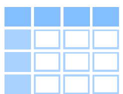
Pro Tip: Notifications are not sent to individuals that are considered "witness to the event" meaning if a task is assigned to me and I close the task, I will not receive a notification that the task was closed. If the task was assigned to a group but not an individual, when I close the task the group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

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.

Report Types

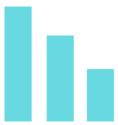
Data can be represented in ServiceNow through a variety of report views.



Tabular

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

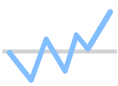
(Types: multi-level pivot table, map, heatmap, bubble)



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".

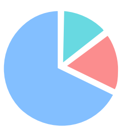
(Types: bar, horizontal bar, pareto, histogram)



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.

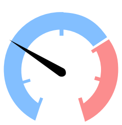
(Types: trend, line, area, spline)



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.

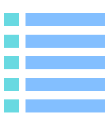
(Types: pie, donut, semi donut)



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.

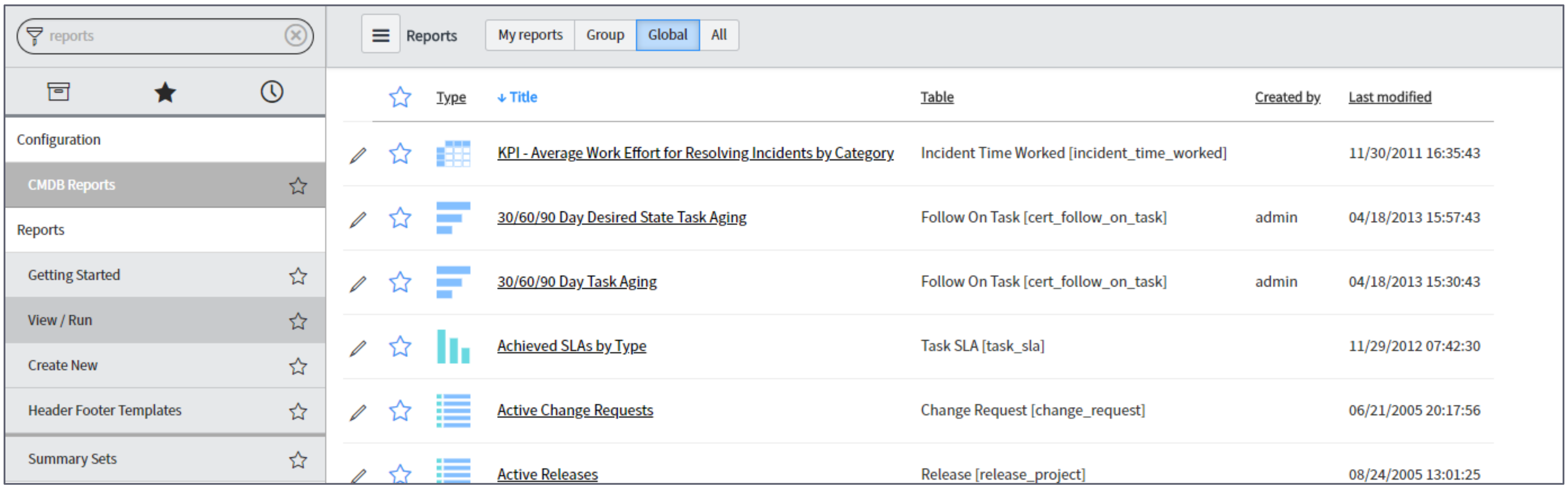
(Types: list, calendar, pyramid, funnel, box, trendbox, control)

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

Reports – Application & Module

In the Application Navigator 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**.



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.

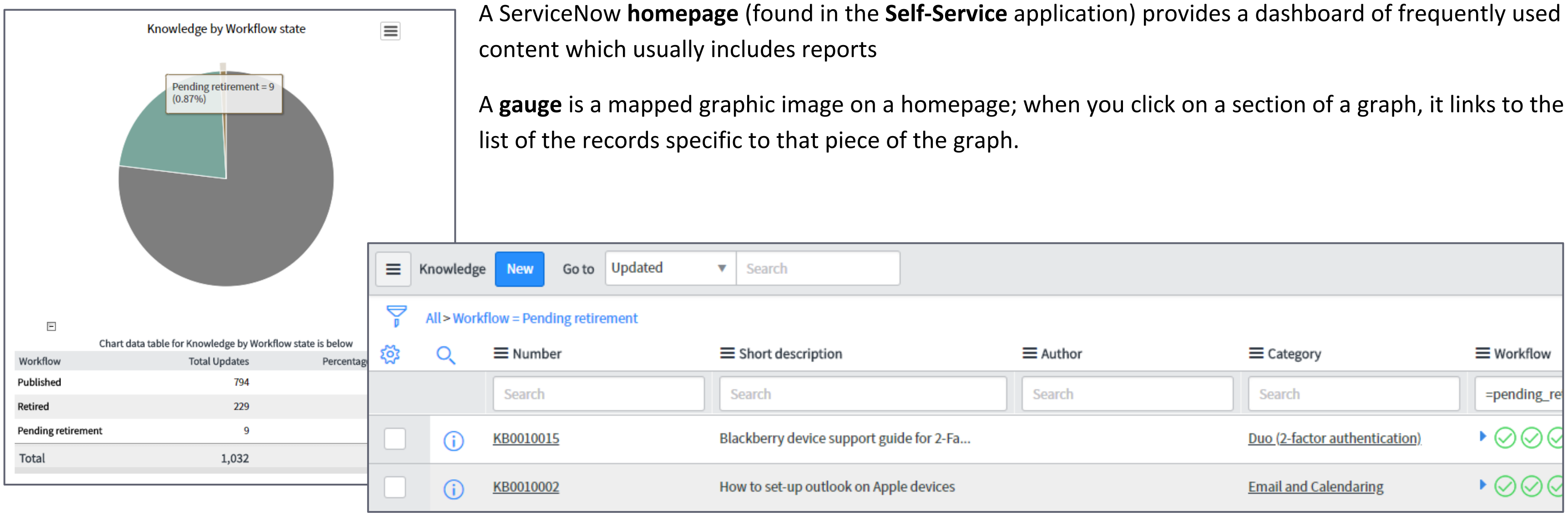
Reports vs. Performance Analytics

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

Homepages and Gauges

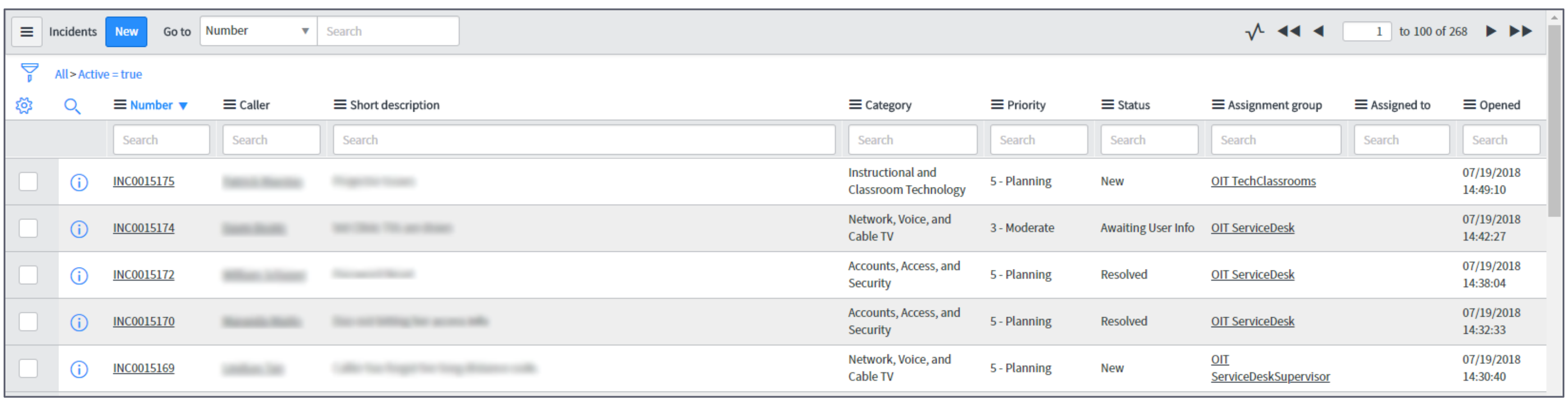
A ServiceNow **homepage** (found in the **Self-Service** application) provides a dashboard of frequently used content which usually includes reports

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.



Finding Stuff

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
New	Button used to create a new record
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
Arrows	Navigation through the pages of records
Funnel icon	Open the custom results filter, a power tool that will be discuss shortly
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
Gear icon	Opens the Personalize List Columns modal so you can customize which columns are display for you in this list view
Magnifying Glass icon	Toggles the column search filter boxes visibility
Column Context (hamburger menu)	A bunch of options to sort, create visual task boards, initialize reports, etc.
Column Names	These can be clicked to sort the records according to that column
Rows of Data	Records
Check box	Used for bulk actions at the bottom of the page
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

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)

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*