Lab Guide

Raising Incidents to Problems and Organization 101

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Default Login / Password:

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employee / Knowledge16

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Lab Goal

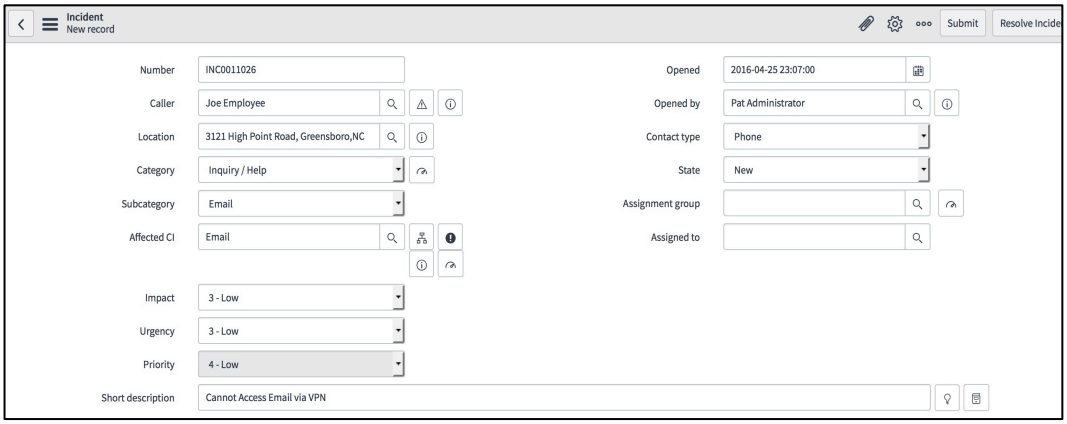
In this first section of the lab you create an incident and determine that you need to create a new problem and associate the incident. You also investigate a tool for auto detecting/creating Problems.

Lab 1.1
Create a Problem

Create an Incident

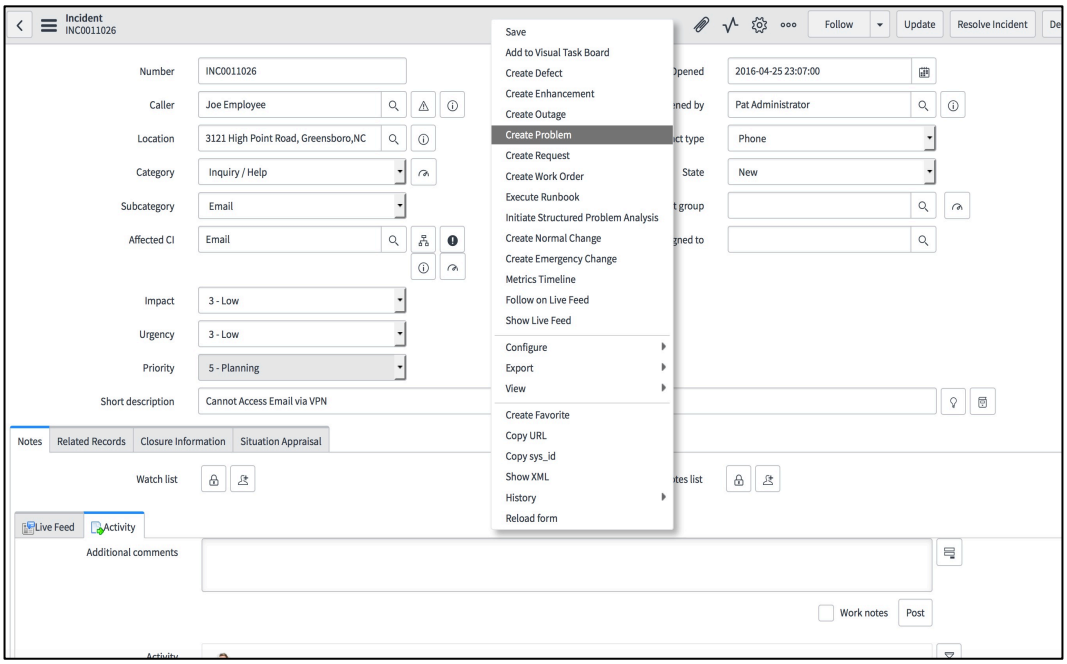
1. Navigate to **Incident > Create New**.

   Caller: **Joe Employee**
   Category: **Inquiry/Help**
   Subcategory: **Email**
   Affected CI: **Email** *(Business Service)*
   Short Description: **Cannot Access Email via VPN**

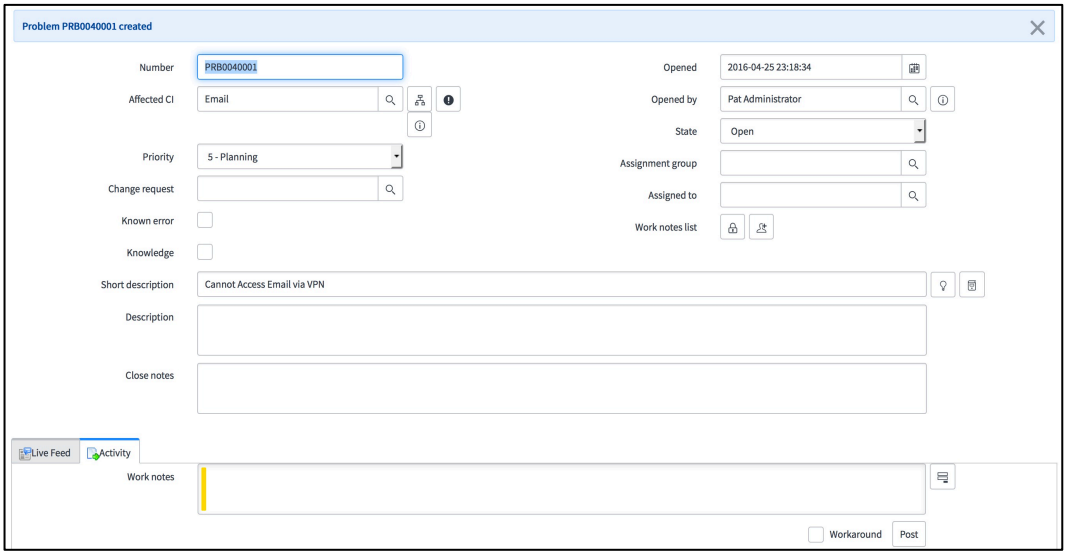


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2. Right-click in the Incident header and select **Create Problem**.



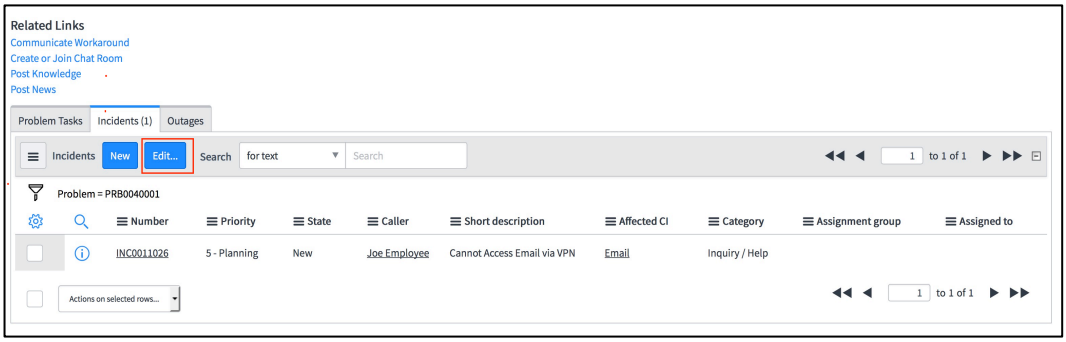
3. Expected result.



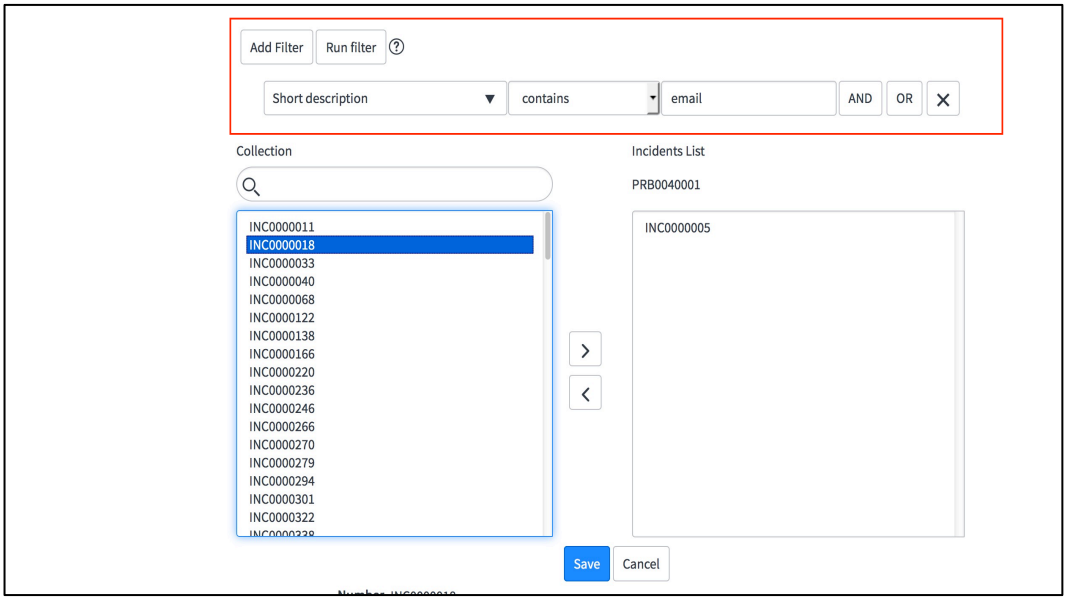
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Associate Related Incidents to the Problem

1. Navigate to the Incidents related list on the newly created Problem and click **Edit**.

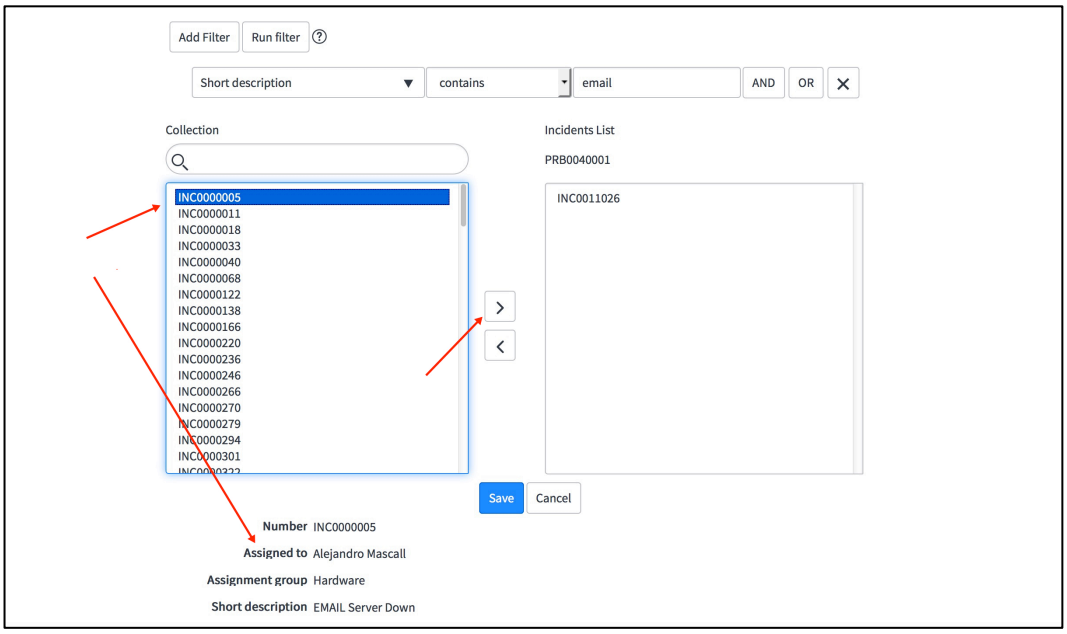


2. Create filter with **Short Description contains email**.

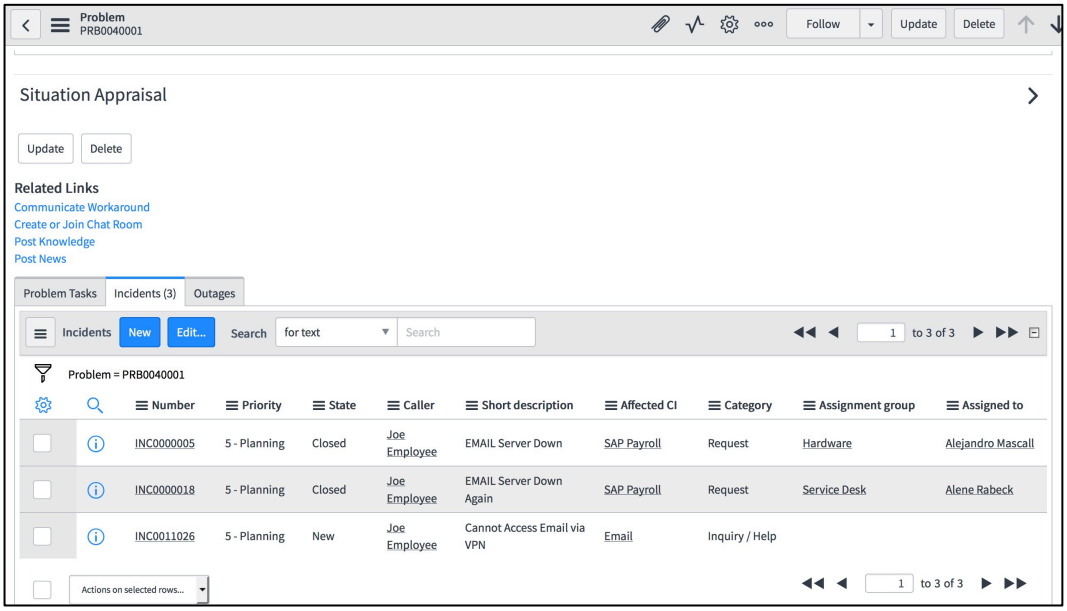


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3. Navigate through the result list adding incidents that are related.



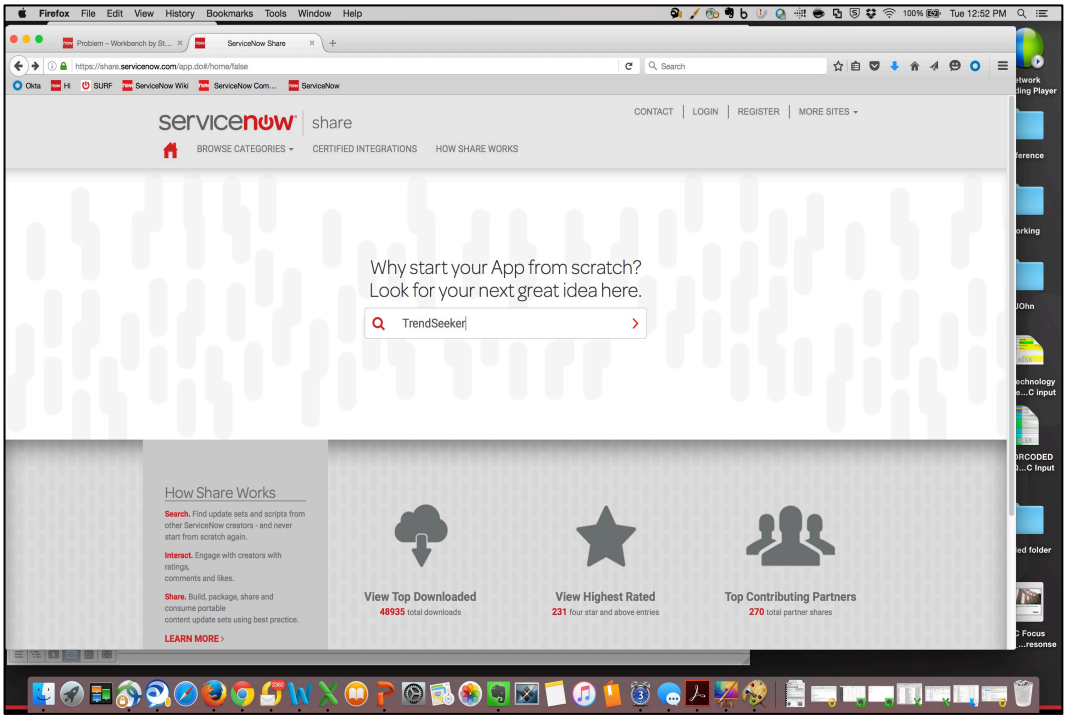
4. Expected result.



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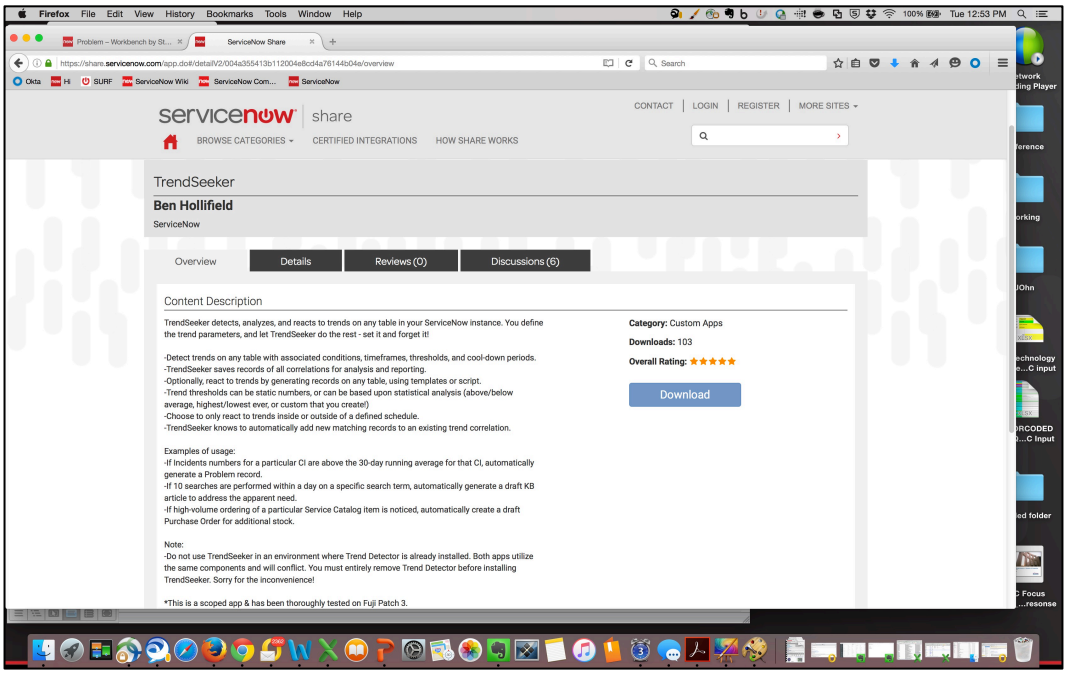
Use Trend Seeker to Automatically Generate Problems

1. Search for **Trend Seeker** at https://share.servicenow.com.

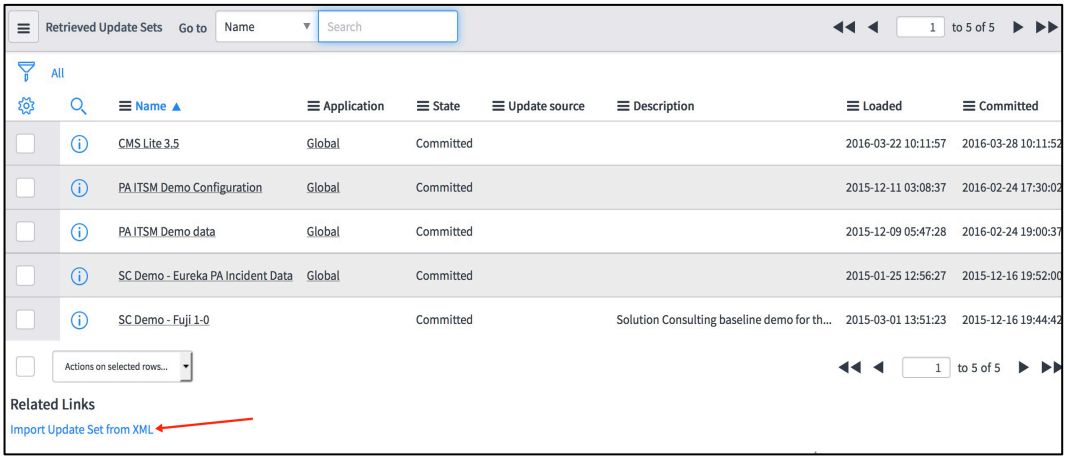


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2. Click **Download**.

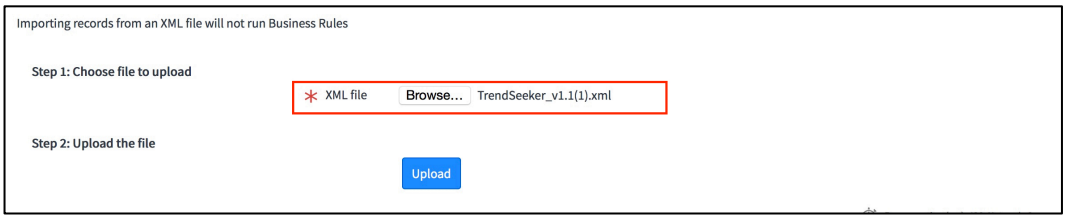


3. Import downloaded XML into **Retrieved Update Sets**.

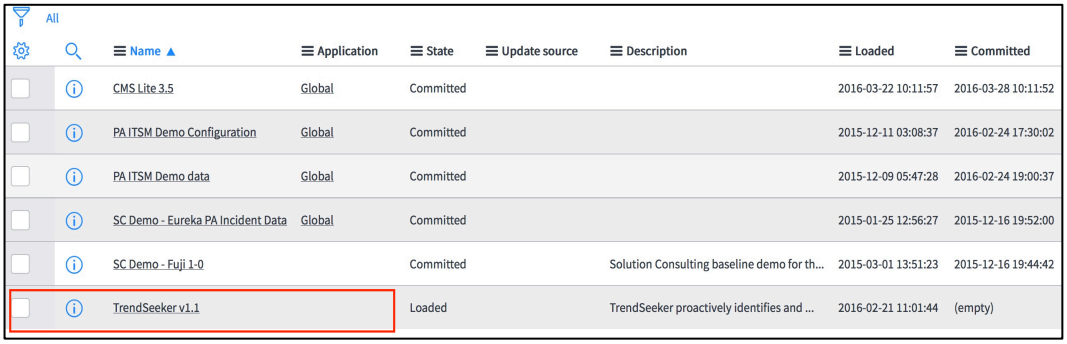


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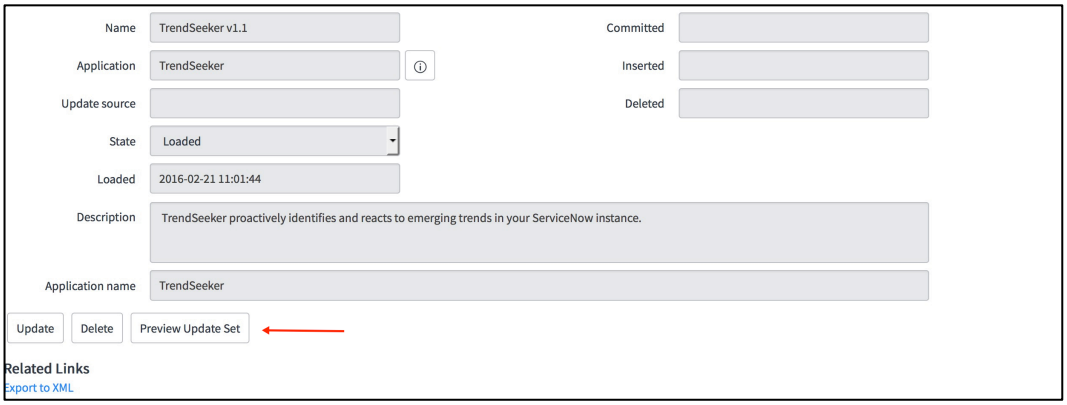
4. Navigate to downloaded file and select **Upload**.



5. Expected result.

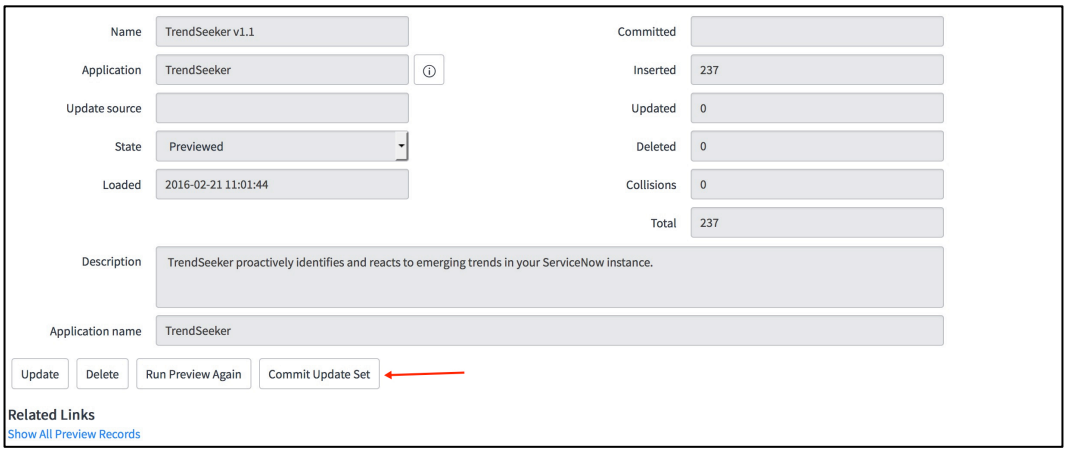


6. Preview the update set.

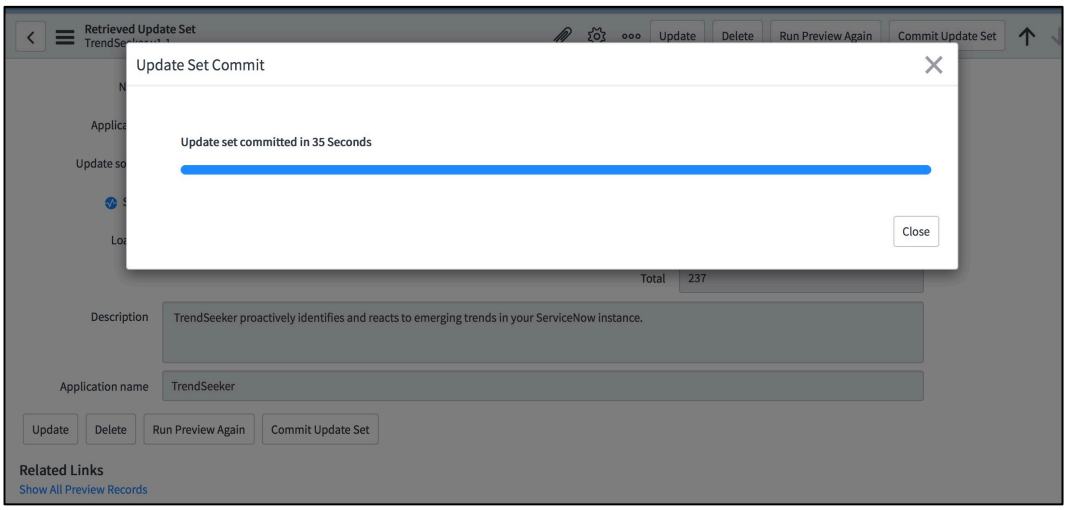


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7. Commit the update set.



8. Expected results.

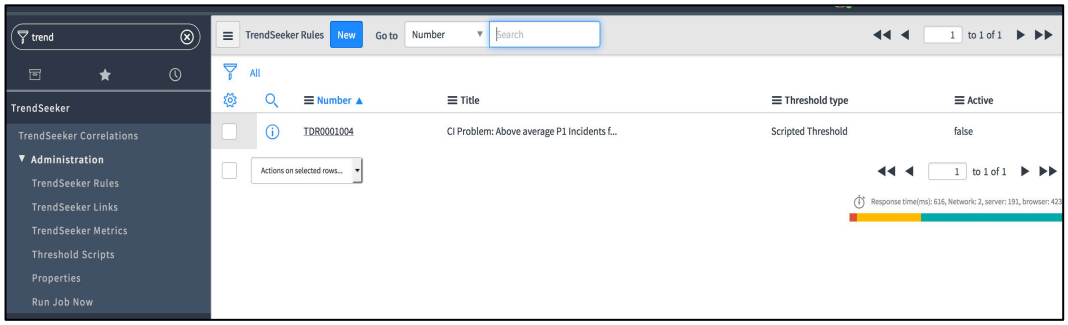


9. Walk through **TrendSeeker**.

   a) Video Demo: https://youtu.be/J9-4t-Uuin8.

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b) Review TrendSeeker Rules.



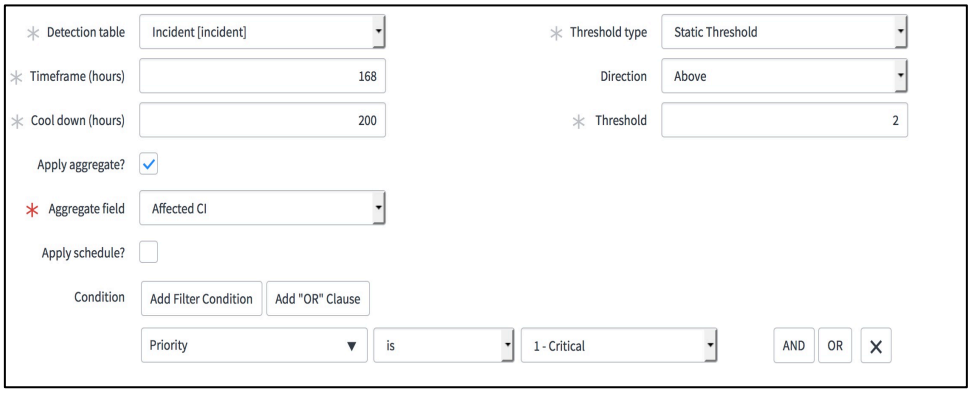
c) Create a record using TrendSeeker.

i) Navigate to **TrendSeeker > TrendSeeker Rules**.

ii) Edit rule for CI Problem: **Above average P1 Incidents for Same CI**.

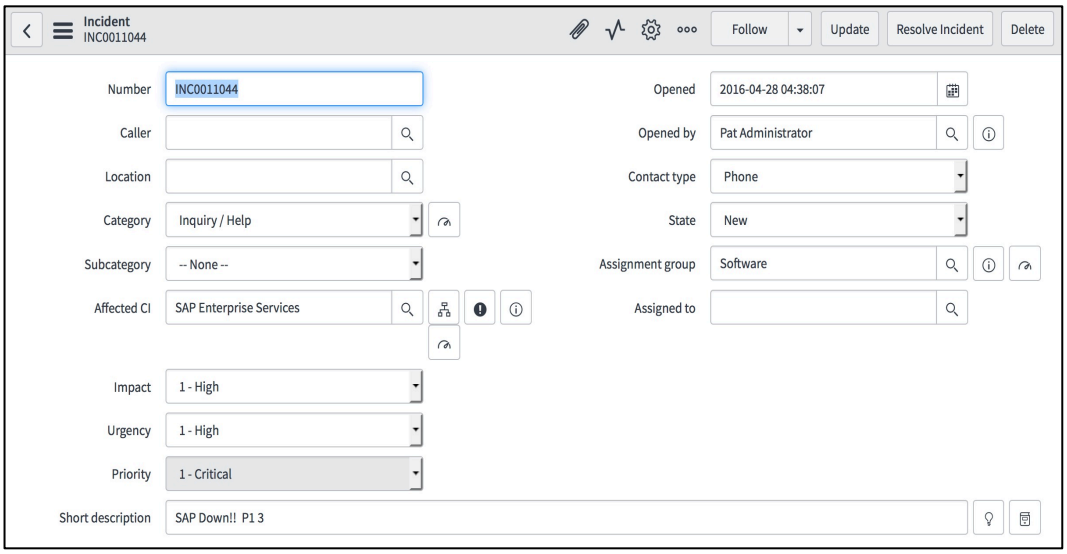
(1) Uncheck **Apply Schedule**.

(2) Change Threshold type to **Static Threshold**.

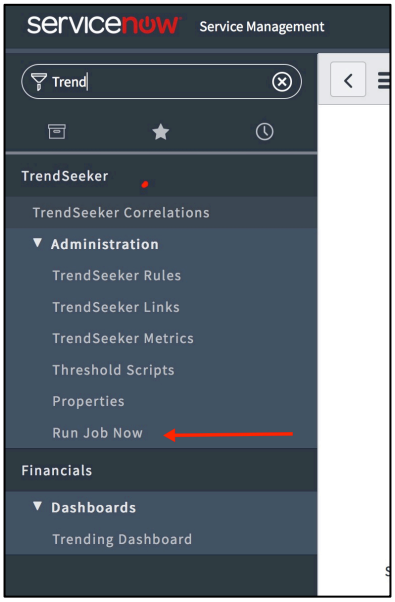


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iii) Create 3 P1 Incidents for the same CI.

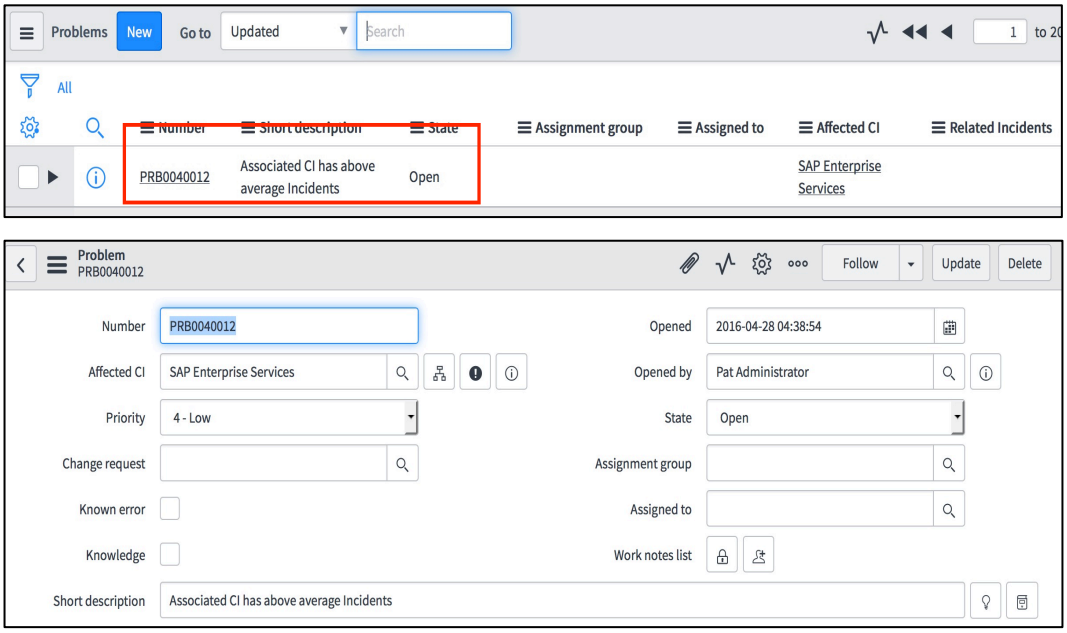


iv) Run the TrendSeeker Job **TrendSeeker > Run Job Now**.



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v) Expected result is new problem record created.



Progress Report

1. Navigate to **Lab Management > Report Lab Progress**.
2. Click **I am done!**

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Lab Goal

In the second section of the lab you discover different methodologies for Problem Management.

Lab 1.2 Working a Problem

Structured Problem Analysis

Structured problem analysis provides a rational methodology for investigating the cause of a problem or incident. This problem solving methodology was developed by Kepner-Tregoe to help problem managers avoid making wrong decisions based on subjective opinions. **This lab walks you through the Structured Problem Analysis application that lets you track the problem analysis process through ServiceNow.**

Appraise the Situation

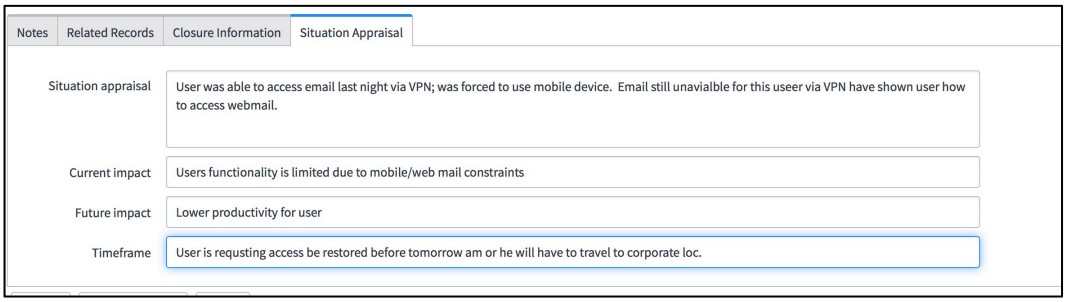
Using the Incident created in the first section:

1. Navigate to the bottom of the form and locate the **Situation Appraisal**.
2. Appraise the situation.

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3. Continue to the next page to see an example.



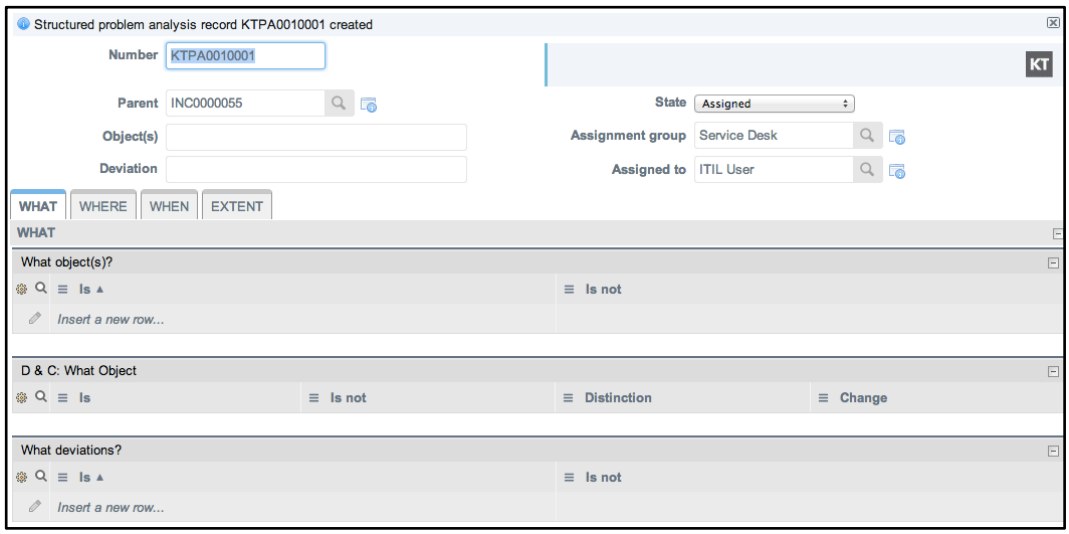


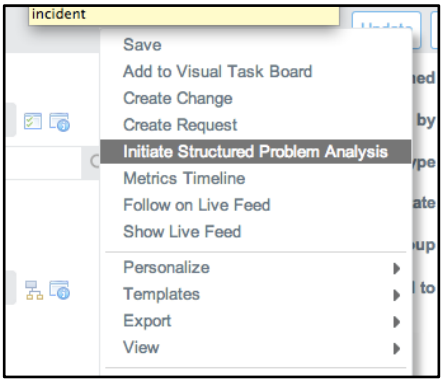
Field	Description
Situation appraisal	A brief statement of the situation.
Current impact	The current impact of the situation.
Future impact	Any anticipated future consequences of the situation.
Timeframe	Any time constraints and deadlines.

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Initiate a Problem Analysis

1. Save your new Incident.
2. Navigate to the top of the form and right-click the header bar. Select **Initiate Structured Problem Analysis.**



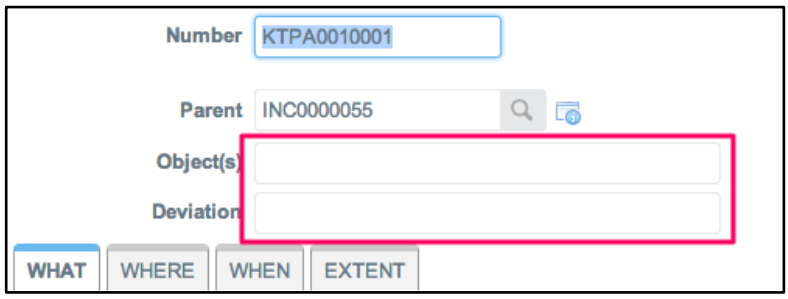


3. This creates a new **Problem Analysis** and links it to the **Incident**.

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Start the Problem Analysis

1. Based on the problem use case, fill in the **Object** and **Deviation**.



Field	Description
Number	An automatically-generated record ID.
Parent	The number of the problem or incident record from which the problem analysis record was created.
State	The current stage of the problem analysis. The state can be **Assigned**, **Work in Progress**, **Think Beyond the Fix**, **Closed**, or **Cancelled**.
Assigned group	The group assigned to work on this problem.
Assigned to	The problem manager assigned to work on this problem.
Object(s)	A text description of the object or objects affected. Forms part of the problem statement.
Deviation	The difference between the expected performance and the actual performance. Forms part of the problem statement.
WHAT, WHERE, WHEN, EXTENT	What the problem is and what it is not, where it occurs, when it occurs, and the extent of the occurrence. This information is all defined later in the process, as part of specifying the problem.

Describe the Problem (What, Where, When and Why)

Specify the problem details by entering values that are definitely true (*Is*) and values that could be true but are not (*Is not*) for:

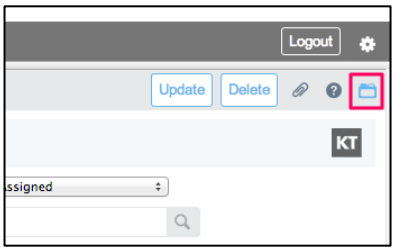
- *What* the problem is and what it is not.
- *Where* the problem occurs and where it does not.
- *When* the problem occurs and when it does not.
- *Extent* to which the problem occurs and the extent to which it does not.

For each *is*, an equivalent *is not* question should be posed, although it may not always be answerable. These two columns aid in eliminating intuitive but incorrect assumptions about the problem.

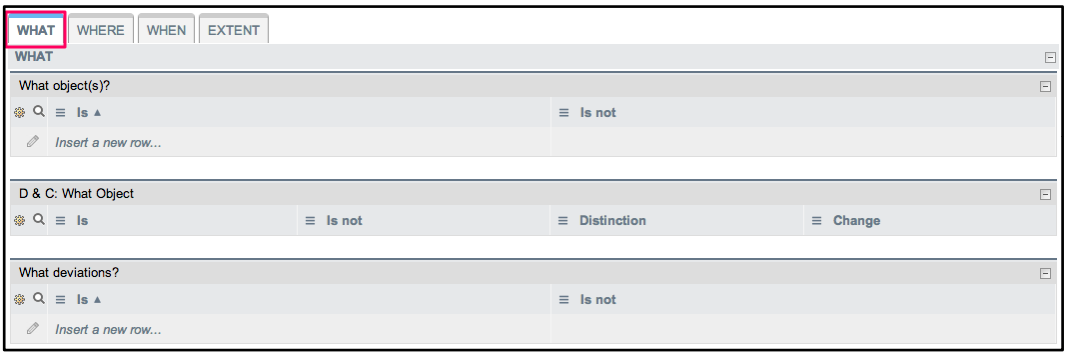
Note: To add these values, double-click **Insert a new row...** on the appropriate embedded list.

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1. Consolidate all the tabs on a form by selecting the tab icon located on the upper right.



2. Navigate to **WHAT**.



3. Based on the *problem use case*, fill in the **What** sections. Refer to the sections below for help.

Field	Description
What object(s)?	The objects that the problem affects.
D & C: What Object	Shows the information entered when listing Distinctions and Changes for the WHAT area.
What deviations?	The deviations from expected behavior.

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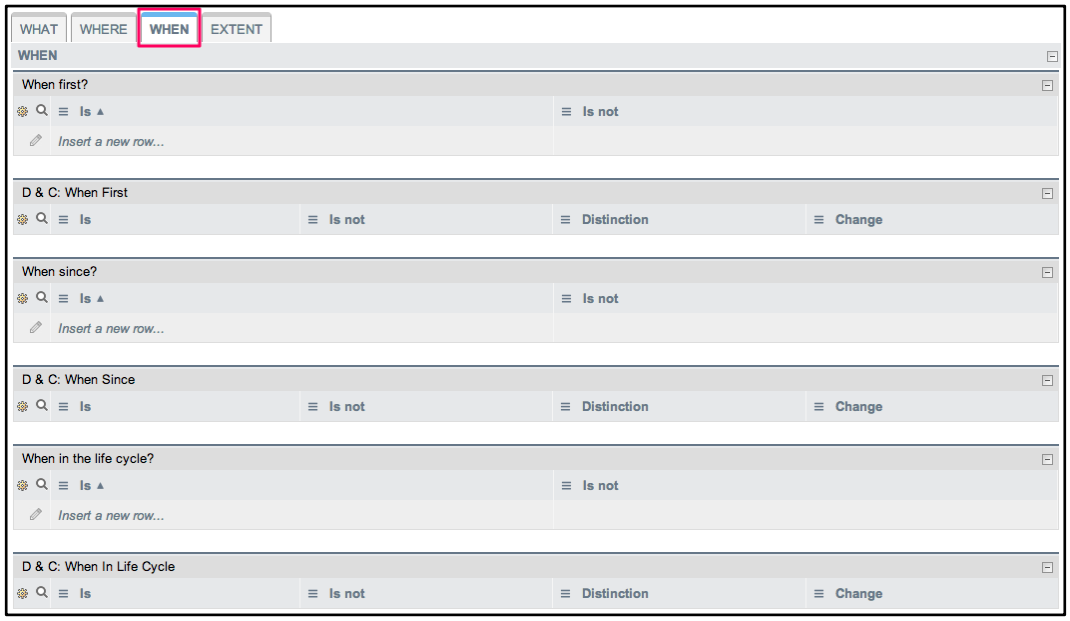
4. Navigate to **WHERE**.



5. Based on the *problem use case*, fill in the **Where** sections. Refer to the sections below for help.

Field	Description
Where geographically	The location where the problem is occurring.
D & C: Where Geographically	Shows the information entered when listing Distinctions and Changes for the WHERE area.
Where on the object	The part and location within the relevant object.

6. Navigate to **WHEN**.



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7. Based on the *problem use case*, fill in the **When** sections. Refer to the sections below for help.

Field	Description
When first?	When was the problem first observed?
D & C: When First	Shows the information entered when listing Distinctions and Changes for the WHEN area.
When since?	When since the first observation has the problem been observed?
D & C: When Since	Shows the information entered when listing Distinctions and Changes for the WHEN area.
When in the life cycle?	When in the standard operational activities of the object does the problem occur?

8. Navigate to **EXTENT**.

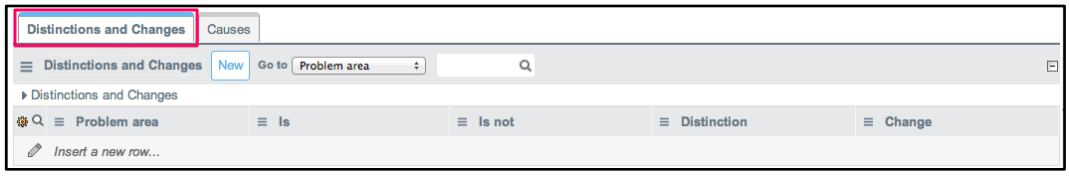


9. Based on the *problem use case*, fill in the **Extent** sections. Refer to the sections below for help.

Field	Description
How many objects?	The number of objects affected.
What is the size?	The magnitude of the problem. Is it localized or widespread?
How many deviations?	The quantity or frequency of the deviations.
What is the trend?	The problem's potential for growth or shrinkage over time.

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10. Navigate back to **What** and locate **Distinctions and Changes** at the bottom of the form.



Define distinctions and changes for each *Is* and *Is not* pair previously defined in the **WHAT**, **WHERE**, and **WHEN** sections. This information helps problem managers to focus on recent changes that may have caused the problem.

Identify Possible Causes

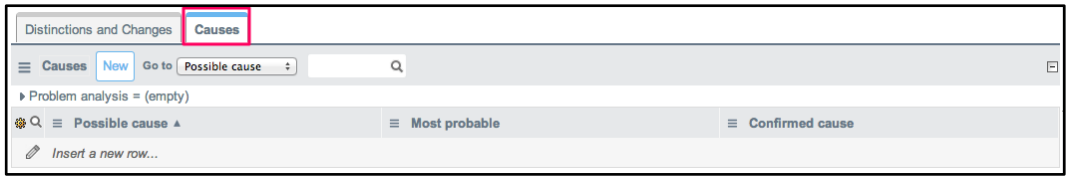
After defining the problem, you should be able to find the actual confirmed cause by:

- Listing all possible causes
- Evaluating each possible cause to find the most probable causes
- Testing the most probable causes
- Confirming the cause

You may identify several causes as most probable and may confirm several causes by the end of the process.

Note: To add these values, double-click **Insert a new row...** on the appropriate embedded list.

1. Navigate to **CAUSES** at the bottom of the form.



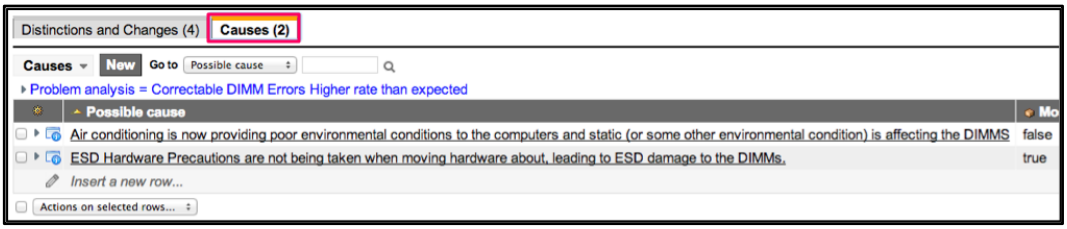
2. Based on the *problem use case*, fill in all the **Possible Causes**.

Evaluate Possible Causes

Note: To add these values, double-click **Insert a new row...** on the appropriate embedded list.

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1. Navigate to **CAUSES** at the bottom of the form.



2. Based on the *problem use case*, evaluate all the **Possible Causes**.

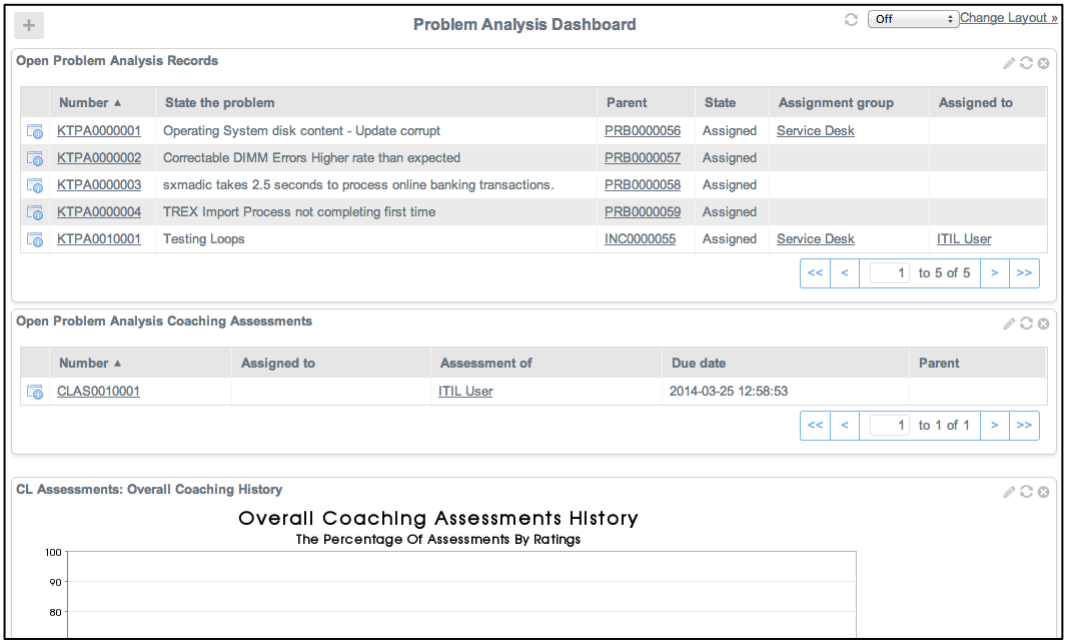
Review Dashboard

The problem analysis dashboard gives problem managers a high-level view of ongoing problem analysis work, including:

- Open problem analysis records (records where the state is not **Closed** or **Cancelled**)
- Open problem analysis coaching assessment records associated with structured problem analysis

1. Navigate to **Structured Problem Analysis > Problem Analysis Dashboard**.

2. Review the information and click any entry to examine it in further detail.



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Request a Coaching Assessment

The coaching loops feature enables a *coach* to monitor a specific behavior in an individual or group, the *coachee*, and provide timely feedback so that the coachee can do a better job the next time.

Coaching loops can be applied to any task-based process in ServiceNow, such as incident management, problem management, and change management. It can be applied to non-task or custom tables as well if the administrator configures a business rule.

The coaching loops feature was released with the Berlin release.

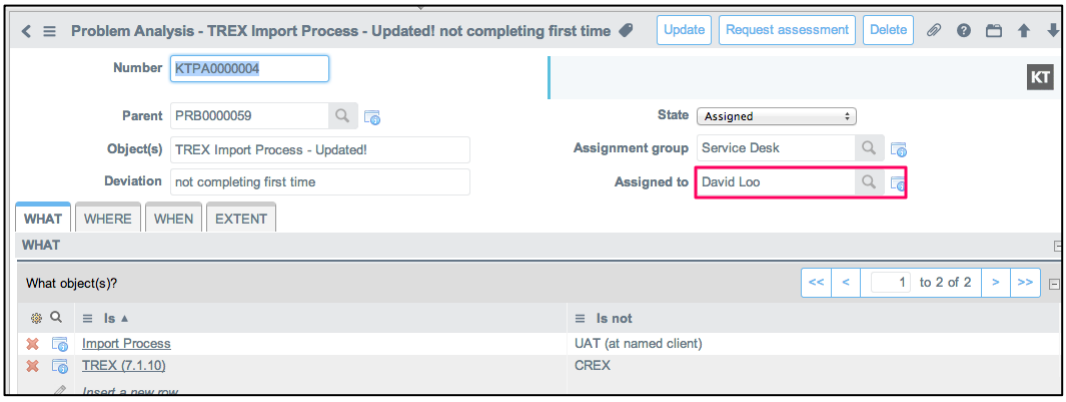
ServiceNow evaluates coaching opportunities against coaching disciplines to generate coaching assessments. When coachees work through a process, such as structured problem management, they perform activities that may be defined as coaching opportunities.

Several criteria must be met to generate a coaching assessment:

- A coaching discipline and a coaching opportunity must exist for the same table
- A single user action, such as updating a problem or changing a problem description, must satisfy the conditions defined on both the discipline and opportunity records
- The **Coachee** on the Opportunity record must be a member of the **Coachee group** on the discipline record

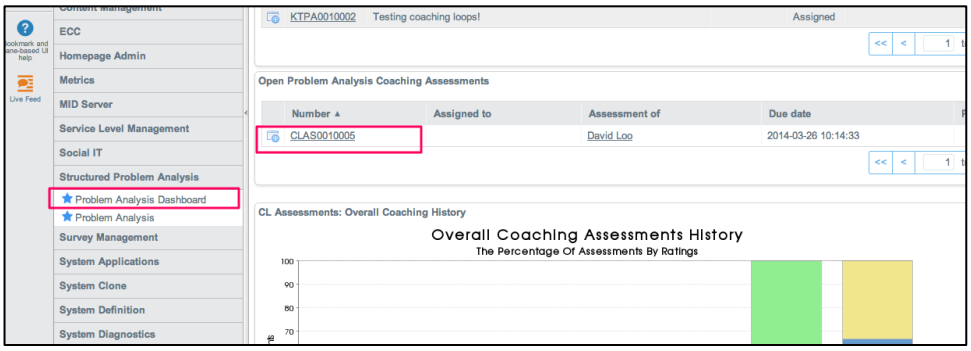
When a coaching discipline and coaching opportunity pair meet these criteria, ServiceNow creates an assessment record for the coachee and assigns it to the coaching group. For this lab, we've made it easy to generate a coaching assessment: Simply assign any Problem Analysis to David Loo.

1. Assign any **Problem Analysis** to **David Loo**. This will generate a coaching assessment we can use for the next example.



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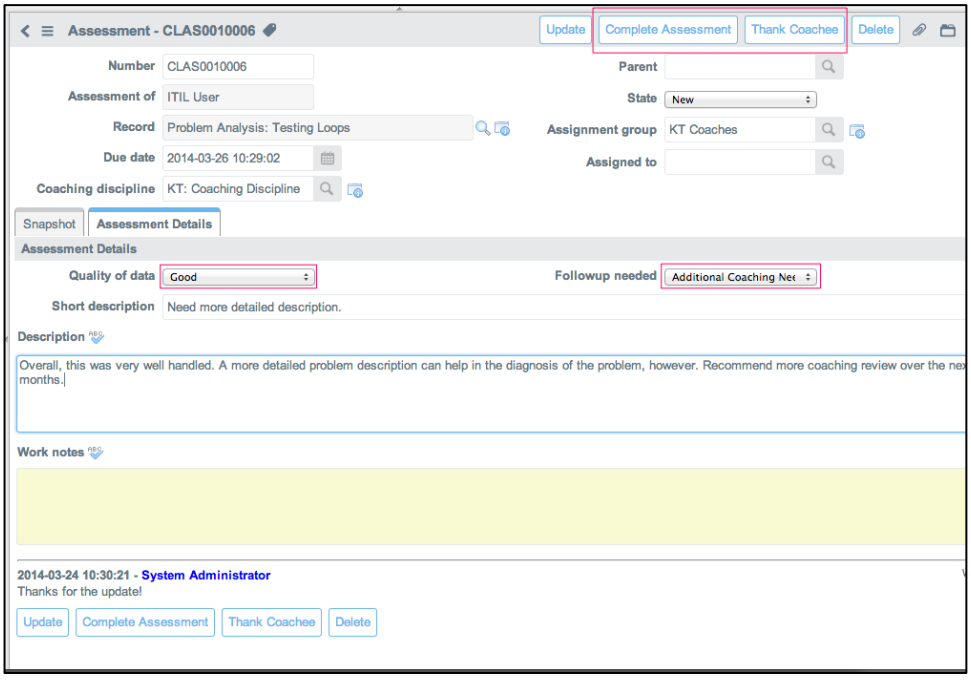
2. Navigate to the **Problem Analysis Dashboard**. Select any coaching assessment.



Assessments are task-based records assigned to a coaching group. The record allows coaches to give feedback to coachees. The **Quality of data** field offers a simple scoring system of the coachee's performance. A coachee can view any field on the assessment form.

Review the assessment and notice the scoring elements as well as the capability to thank the coachee (which is a notification event).

1. Add some detail, including a score and click Complete Assessment.



2. Navigate back to **Structured Problem Analysis > Problem Analysis Dashboard**. Review the updated results.

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The 5 Whys

Asking "Why?" may be a favorite technique of your three year old child in driving you crazy, but it could teach you a valuable Six Sigma quality lesson. The 5 Whys is a technique used in the Analyze phase of the Six Sigma DMAIC (Define, Measure, Analyze, Improve, Control) methodology. It is a great Six Sigma tool that does not involve data segmentation, hypothesis testing, regression or other advanced statistical tools, and in many cases, can be completed without a data collection plan.

By repeatedly asking the question "Why" (five is a good rule of thumb), you can peel away the layers of symptoms that can lead to the root cause of a problem. Very often, the ostensible reason for a problem will lead you to another question. Although this technique is called "5 Whys," you may find that you will need to ask the question fewer or more times than five before you find the issue related to a problem.

Benefits of the 5 Whys

- Helps identify the root cause of a problem
- Determines the relationship between different root causes of a problem
- One of the simplest tools; easy to complete without statistical analysis

When Is 5 Whys Most Useful?

- When problems involve human factors or interactions
- In day-to-day business life; can be used within or without a Six Sigma project

How to Complete the 5 Whys

1. Write down the specific problem. Writing the issue helps you formalize the problem and describe it completely. It also helps a team focus on the same problem.
2. Ask Why the problem happens and write the answer down below the problem.
3. If the answer you just provided doesn't identify the root cause of the problem that you wrote down in Step 1, ask Why again and write that answer down.
4. Loop back to step 3 until the team is in agreement that the problem's root cause is identified. Again, this may take fewer or more times than five Whys.

5 Whys Examples

Problem Statement: Customers are unhappy because they are being shipped products that do not meet their specifications.

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1. Why are customers being shipped bad products?

Because manufacturing built the products to a specification that is different from what the customer and the sales person agreed to.

2. Why did manufacturing build the products to a different specification than that of sales?

Because the sales person expedites work on the shop floor by calling the head of manufacturing directly to begin work. An error happened when the specifications were being communicated or written down.

3. Why does the sales person call the head of manufacturing directly to start work instead of following the procedures established in the company?

Because the "start work" form requires the sales director's approval before work can begin and slows down the manufacturing process (or stops it when the director is out of the office).

4. Why does the form contain an approval for the sales director?

Because the sales director needs to be continually updated on sales for discussions with the CEO.

In this case only four Whys were required to find out that a non-value added signature authority is helping to cause a process breakdown.

Take a look at a slightly more humorous example modified from Marc R.'s posting of 5 Whys in the iSixSigma Dictionary.

Problem Statement: You are on your way home from work and your car stops in the middle of the road.

1. Why did your car stop?

Because it ran out of gas.

2. Why did it run out of gas?

Because I didn't buy any gas on my way to work.

3. Why didn't you buy any gas this morning?

Because I didn't have any money.

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4. Why didn't you have any money?

Because I lost it all last night in a poker game.

5. Why did you lose your money in last night's poker game?

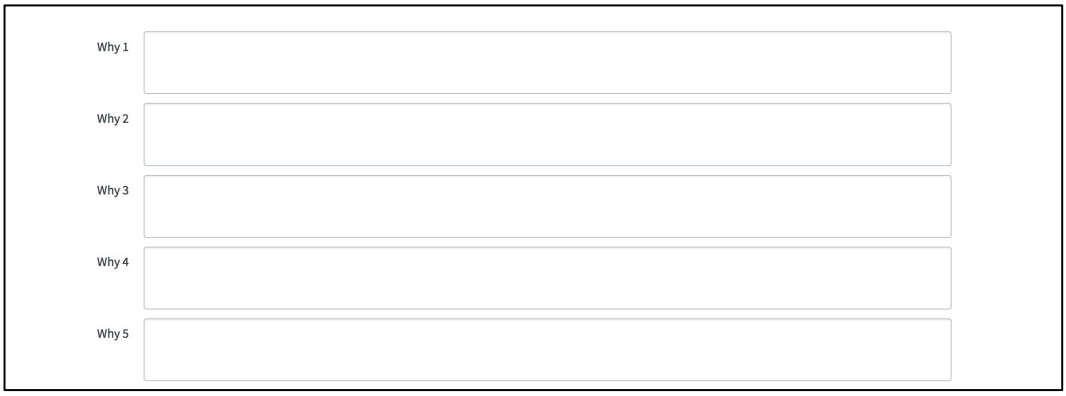
Because I'm not very good at "bluffing" when I don't have a good hand.

As you can see, in both examples the final Why leads the team to a statement (root cause) that the team can take action upon. It is much quicker to come up with a system that keeps the sales director updated on recent sales or teach a person to "bluff" a hand than it is to try to directly solve the stated problems above without further investigation.

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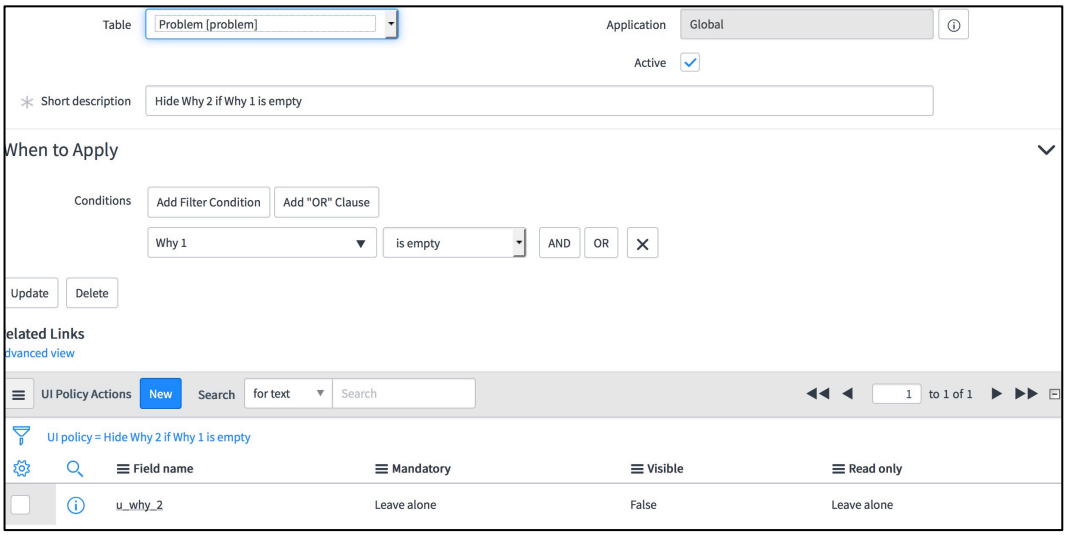
Configure ServiceNow Problem for 5 Whys

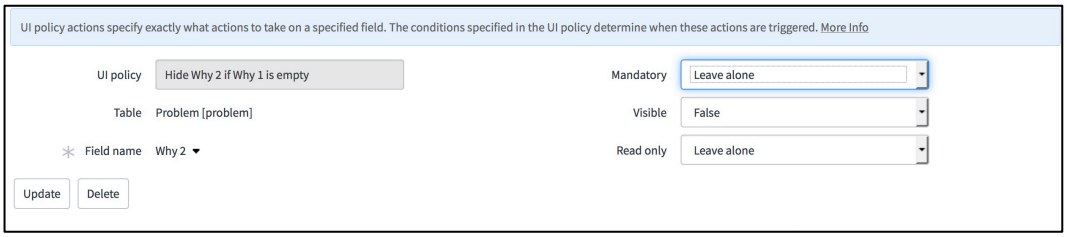
1. Insert **5 Translated** text fields on the problem form: **Why 1, Why 2, Why 3, Why 4, Why 5.**

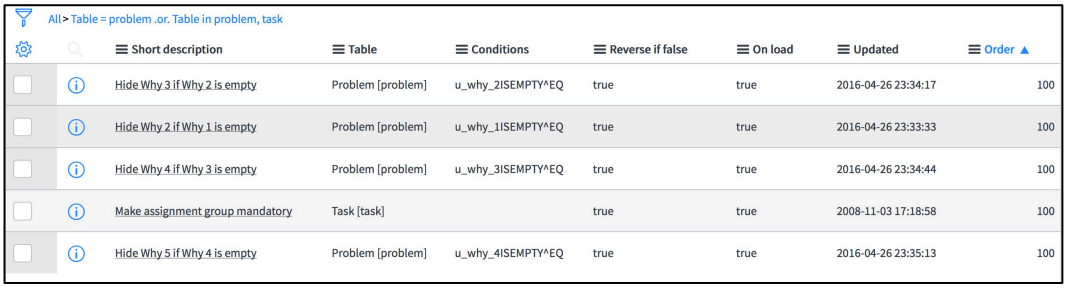


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2. Create a set of **UI Policies** to reveal one why at a time.







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