knowledge17
May 7–11, 2017 • Orange County Convention Center • Orlando, FL

Lab Guide

Rapid Service Restoration:

Incident 101

Tobias Kutzer & Kerstin Weihe

Default Login / Password:

admin / Knowledge17

itil / Knowledge17

employee / Knowledge17

Lab Sponsored by Microsoft Azure



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Lab Goal

This lab explains how to create an incident as an end user from the Employee Self-Service Portal.

Lab Hint:
If possible, use two different browsers (like Firefox and Chrome). One browser to log in as Joe employee (end user view) and another browser for the other users (back end view).

All exercises also can be done using just one browser by logging in and out the different user accounts accordingly.

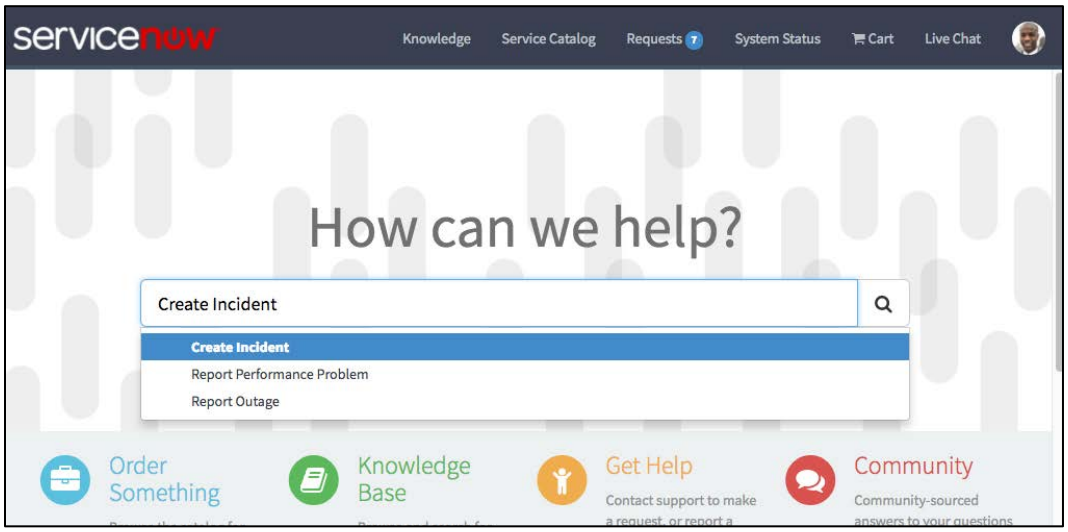
Lab 1.1 Create Incident via Service Portal

Create an Incident from the Self-Service Portal

1. Navigate to the **Service Portal Home** of your training instance by adding **/sp** to the URL, for example https://<myinstance>.service-now.com/sp.

2. Log on with **employee/Knowledge17** credentials.

3. Type **Create Incident** into the Search Field and select **Create Incident.**



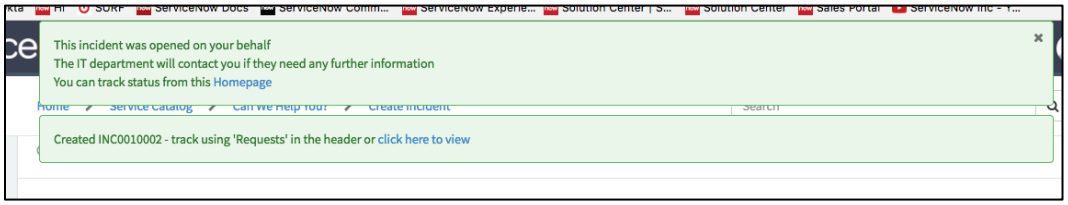
4. Set **Urgency** to **2 –Medium**.

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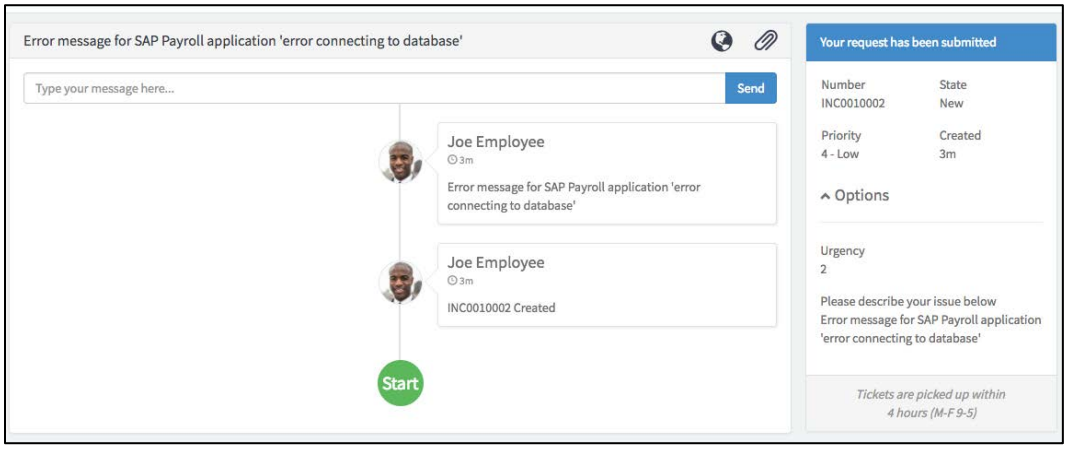
5. Set short description to **Error message for SAP Payroll application 'error connecting to database'**.

6. Click **Submit**.

   Note: The form should now change to a read only view. A green box opens with the incident number and a link.



7. Click the **click here to view** link in the green status bar. A screen like the example should appear with your incident details. As an alternative, you can click **Requests** in the main menu.



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Did you know?

There are more ways to create incidents in ServiceNow:

1. Based on a call with CTI (Computer Telephony Integration)
2. Via inbound Email
3. By an IoT (Internet of Things) connected device
4. Via ITOM (IT Operations Management) Event Management

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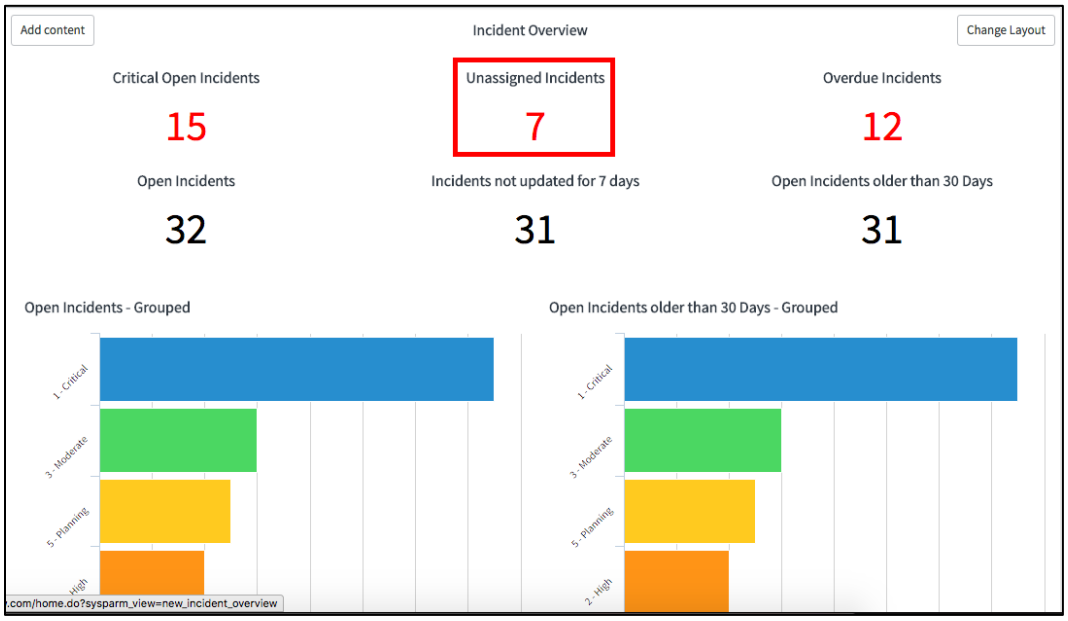
Lab Goal

This lab explains how to use the Incident form to categorize and assign incidents.

Lab 1.2 Categorize and Assign

Categorize and Assign the Incident

1. Log on to you training instance with **itil/Knowledge17** credentials.
2. Click **Incident > Overview.**
3. Examine the **Incident Overview Dashboard** and click on **Unassigned Incidents**.



4. Open the incident with the title **Error message for SAP Payroll application 'error connecting to database'**.
5. The Category shows **Inquiry / Help**. Look at the choices for the **Subcategory**.
6. Change the Category to **Software.**

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7. Change the Subcategory to **Operating System.**

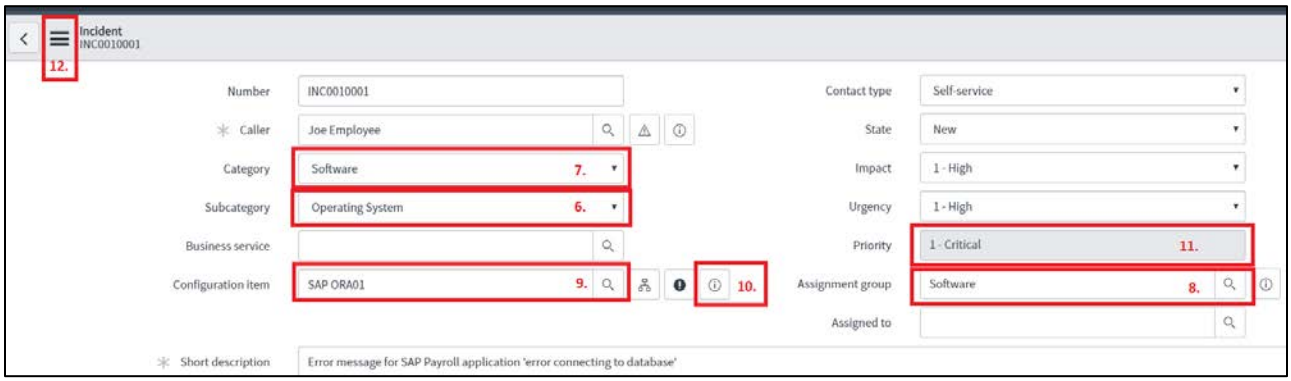
8. Change the Assignment Group to **Software**.

9. Set the Configuration Item to **SAP ORA01**.

10. Hover over the Record  icon next to the Configuration Item field to display information about the configuration item.

11. Change the Impact to **1 – High** and the Urgency to **1 – High**.
Note: The Priority is automatically calculated based on Impact and Urgency.

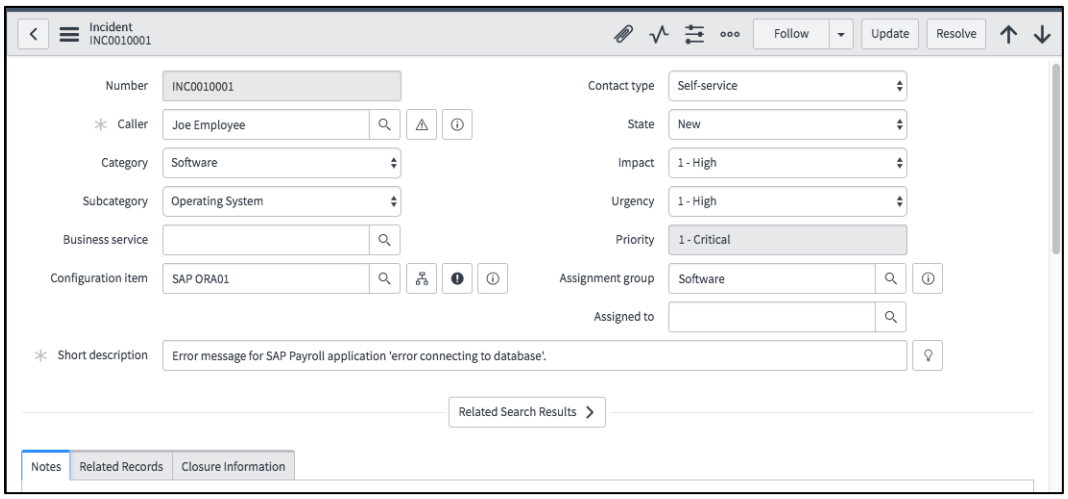
12. Click the  icon at the top-left of the form and select **Save**.



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Lab Success Verification

1. The screen should look like the example.



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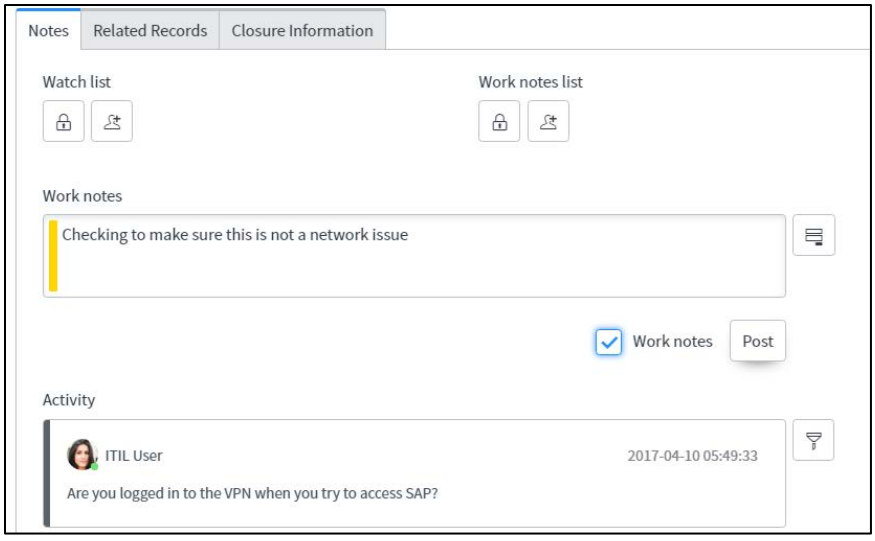
Lab Goal

This lab explains how comments and work note fields can be used to share information with the appropriate people.

Lab 1.3
Investigate and Diagnose

Using Comments and Work Notes

1. Log on to you training instance with **itil/Knowledge17** credentials.
2. Navigate to **Incident > Open,** and open the incident you have created (the caller is **Joe Employee)**.
3. Navigate to the Notes tab and add the following text to additional comments (Customer visible) field: **Are you logged in to the VPN when you try to access SAP?** and click **Post.**
4. Click the check box **Work notes** to enter an internal work note.



Add the following text to the Work Notes field: **Checking to make sure this is not a network issue** and click **Post.**

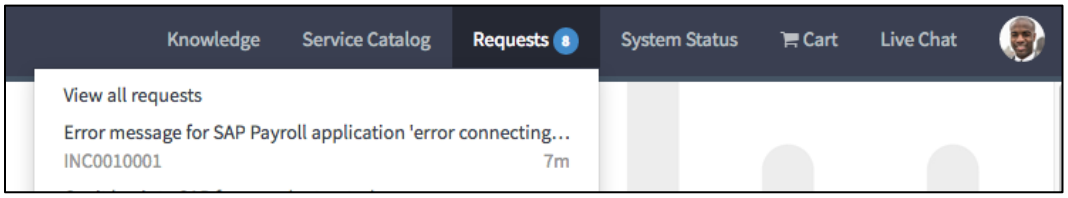
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5. Click the icon at the top of the form and click **Save.**
   Note: Clicking **Save** triggers a notification to the caller informing him that a comment has been added to his incident. The caller can either reply to the email or log in to the instance to reply.

6. If you are using multiple browsers during the training session, please switch browsers and navigate to the **Service Portal** of your training instance by adding a **/sp** to your URL.

7. Log on with **employee/Knowledge17** credentials.

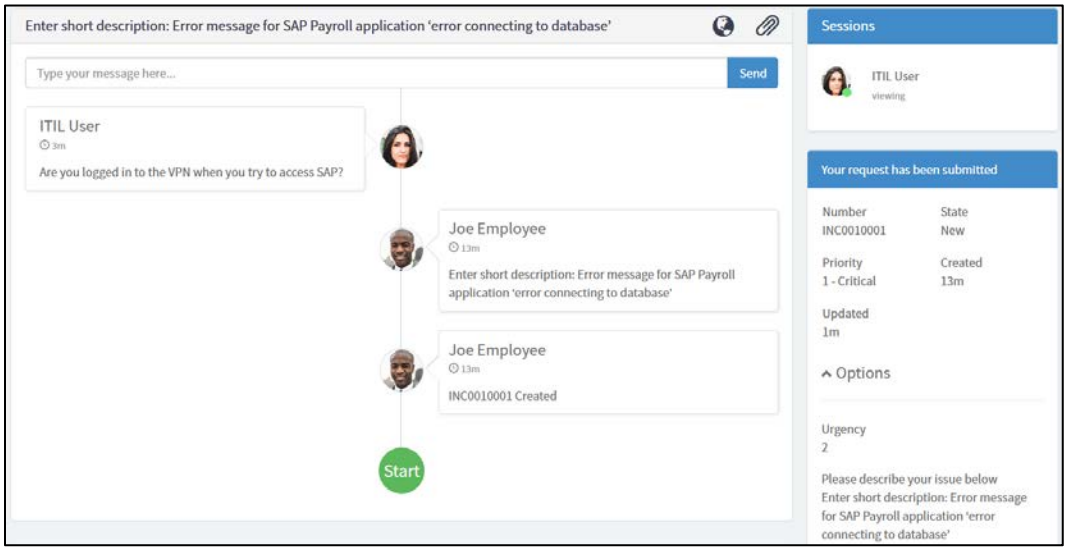
8. Click **Requests** in the top menu bar.



9. Select the incident you have created **Error message for SAP Payroll application 'error connecting to database'**.

10. You can see the costumer visible information added by ITIL user but you are not able to see the work notes because **Work Notes** fields are not customer-visible.

11. If you are using two browsers, at top-right you can see who else is viewing the record; in this case, ITIL User as it is still open in the other browser.

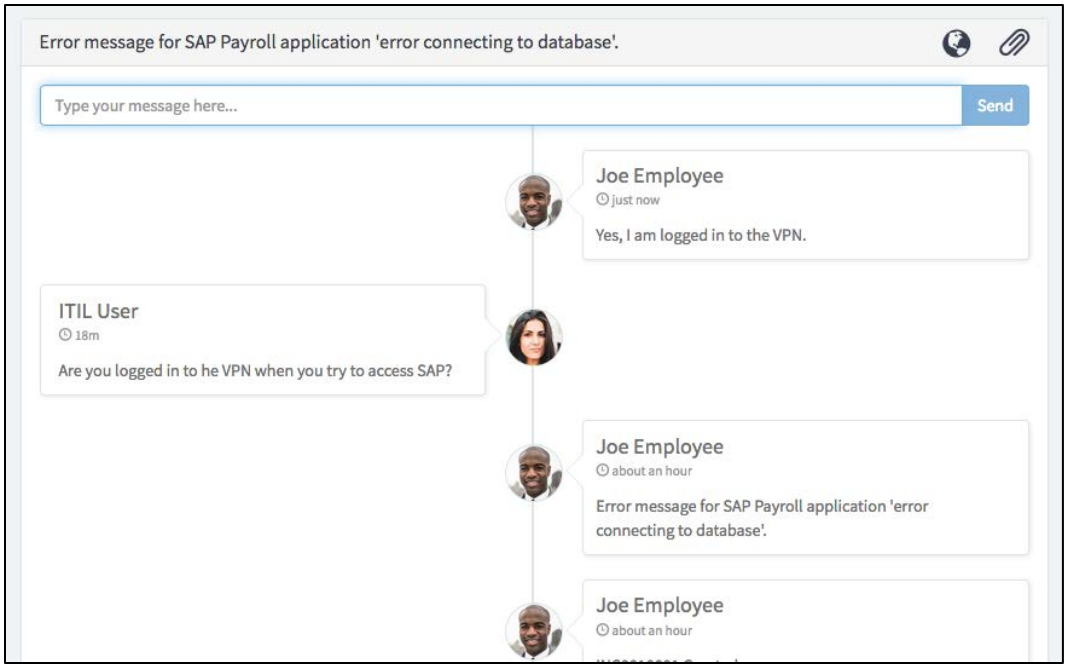


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12. Enter the following text into the **Additional Comments** field: **Yes, I am logged in to the VPN**. and click **Send.**

Lab Success Verification

1. The screen should look like the example.



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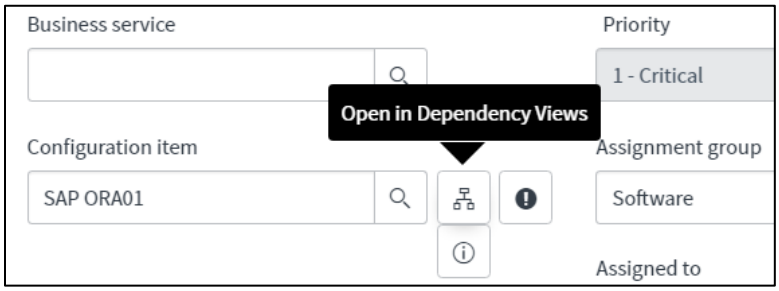
Lab Goal

Use the Business Services Management Map to understand relationships within the CMDB.

Lab 1.4
Investigate and Diagnose

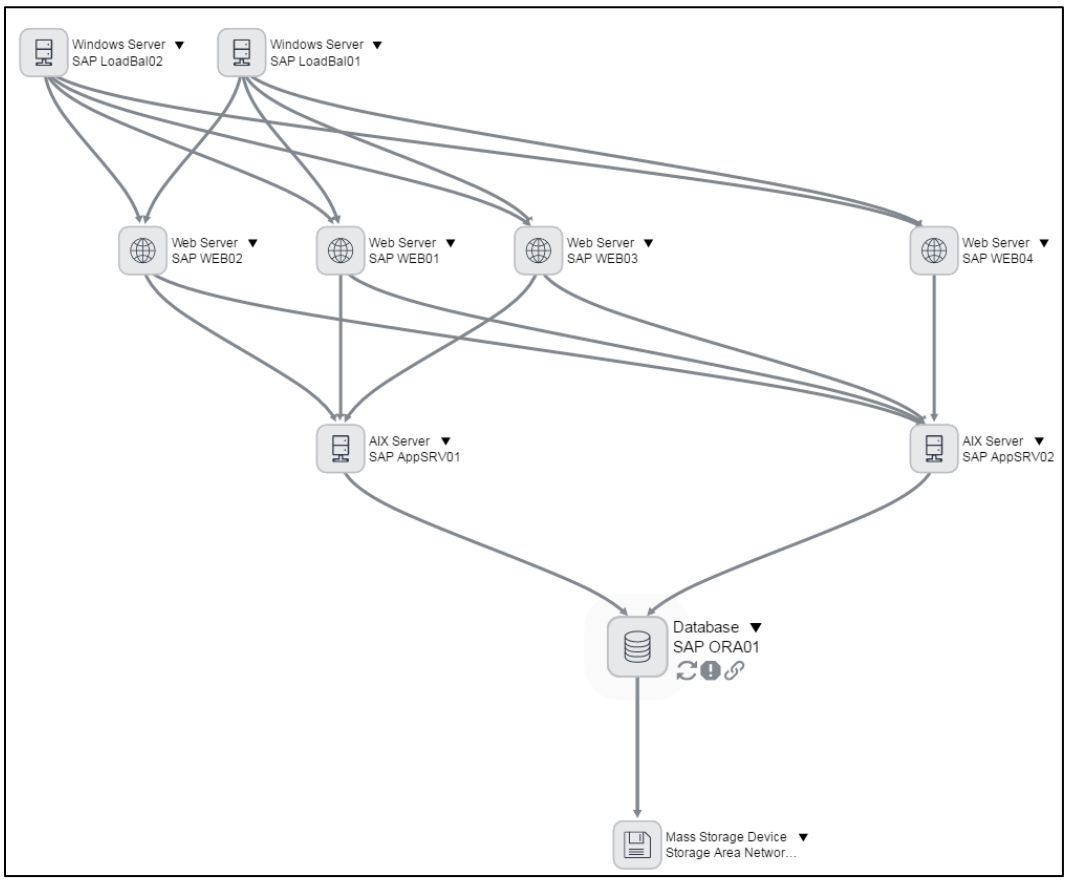
Troubleshoot the Incident Using the BSM Map

1. Log on to your training instance with **itil/Knowledge17** credentials.
2. Navigate to **Incident > Open,** and open the incident you have created (caller is **Joe Employee**).



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3. Click the **CI Map**  icon next to the **Configuration Item** field.



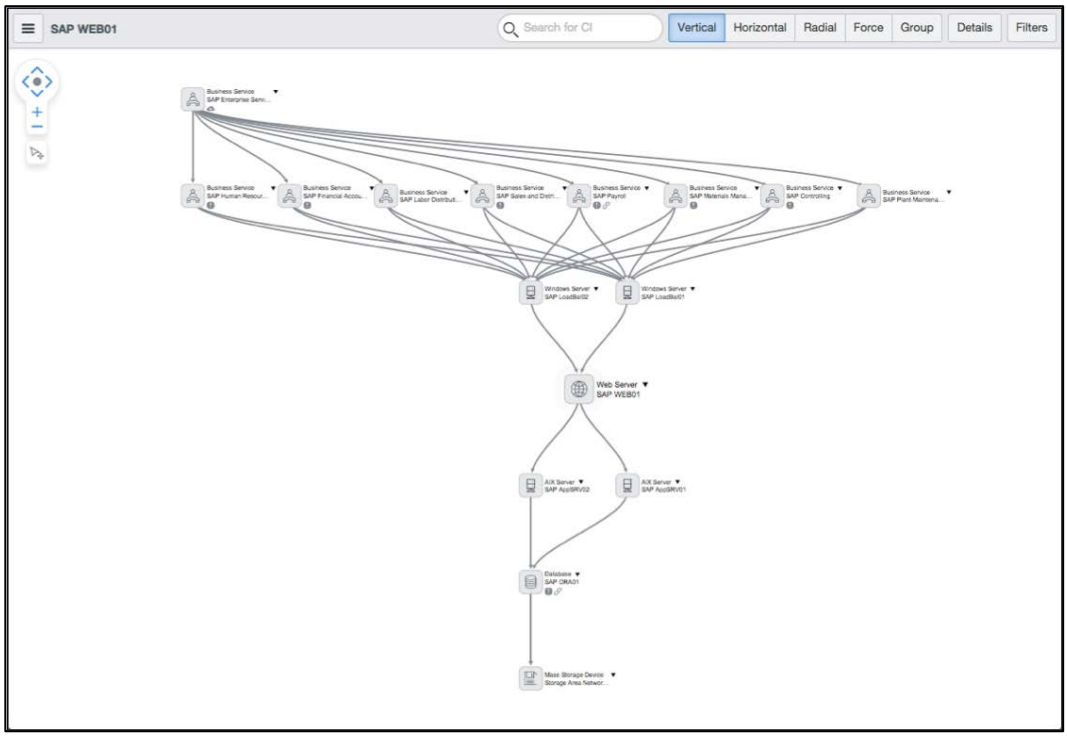
4. Right-click **SAP WEB01** and select **View Map**.

   Note: SAP WEB01 supports multiple Business Services. As well as SAP WEB01 is supported by additional infrastructure.

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Lab Success Verification

1. The screen should look like the example.



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Lab Goal

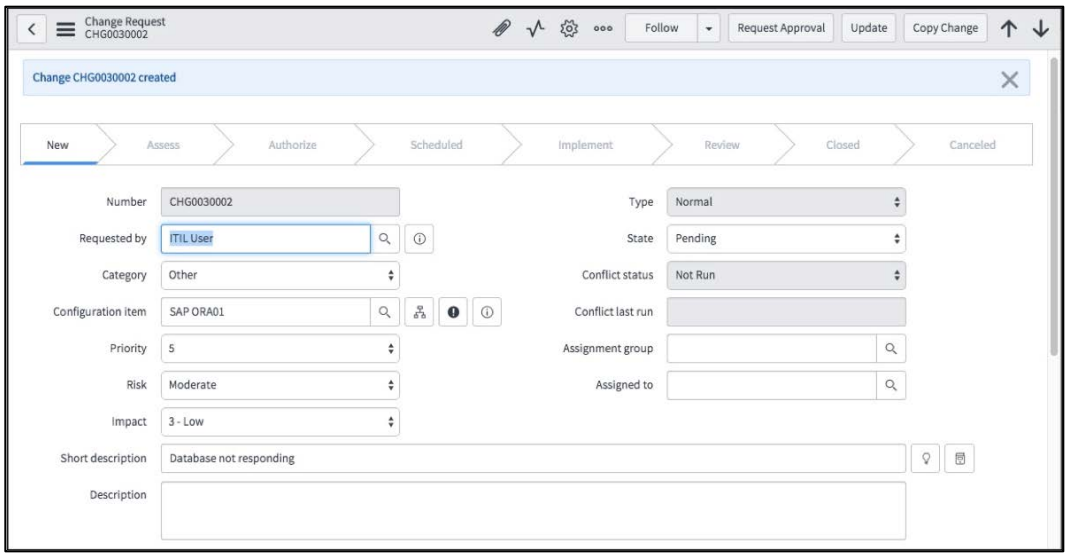
This lab explains how to create a Change Request from an Incident. It also shows the relationship between these records.

Lab 1.5 Related Records

Create a Change Request

1. Log on with **itil/Knowledge17** credentials.
2. Navigate to **Incident > Open,** and open the incident you created for the SAP issue.
3. Right-click the ☰ icon in the header and choose **Create Normal Change.**

   Note: Information from the incident record is automatically populated on the change record.



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4. Click the Back button on the top-left of the form to return to the Incident form.





Note: The change request number is populated in the Change Request field.

5. Hover over the Record icon next to the **Change Request** field to display information about the change request.

Lab Success Verification

1. The screen should look like the example.



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Lab Goal

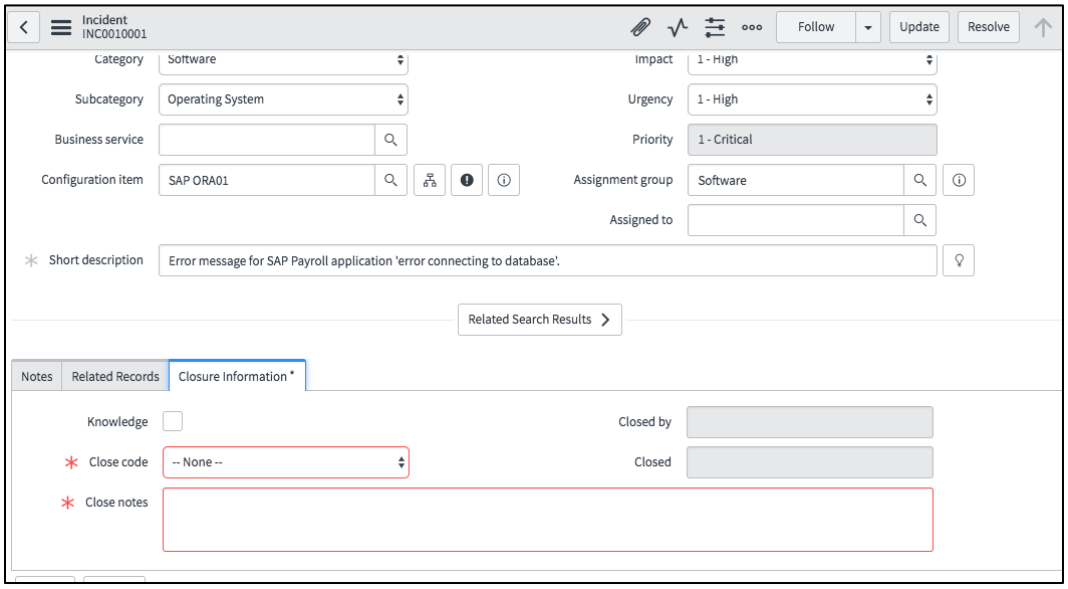
This lab explains how to resolve an incident.

Lab 1.6
Resolve Incident

Resolve an Incident

1. Navigate to your training instance(?).
2. Log on with **itil/Knowledge17** credentials.
3. Navigate to **Incident > Open,** and open the incident you created for SAP.
4. Click the **Resolve Incident** button on the top-right of the form.

   Note: You cannot resolve the incident before filling in all required fields, which are now highlighted in red.



5. In the Notes section, add the following text in the Additional Comments field: **Access to SAP was restored after reboot.**
6. In the Closure Information section, set the Close Code field to **Solved (Work Around).**

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7. Add the following text to the Close Notes field:
   Caller can access SAP after rebooting.

8. Click the **Resolve Incident** button again.

Lab Success Verification

1. The screen should look like the example.



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Lab Goal

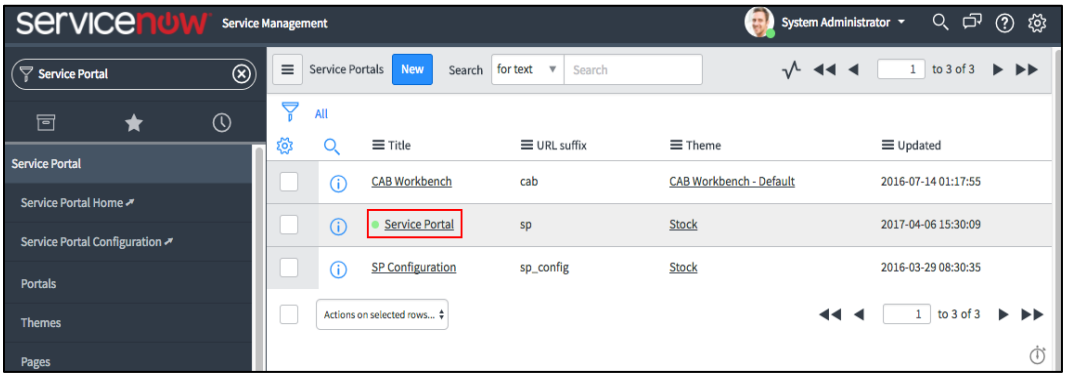
This lab explains how to add a chat queue to the Service Portal to allow users to use the Connect Support capability.

Lab 2.1
Prepare
Connect Chat

Initiate a Connect Support Session

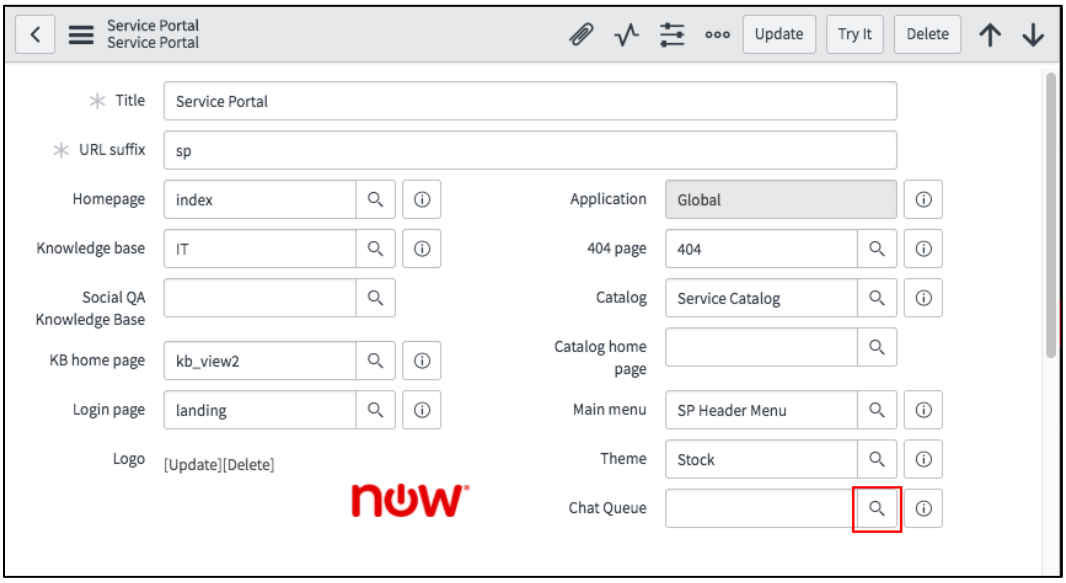
1. Log on to your training instance using the credentials **admin/Knowledge17**.

2. Go to **Service Portal > Portals** and select Service Portal.



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3. On the right side of the window, click the magnifier icon next to the chat queue field.



4. Click **New.**

5. Set the Name of the queue to **Service Desk.**

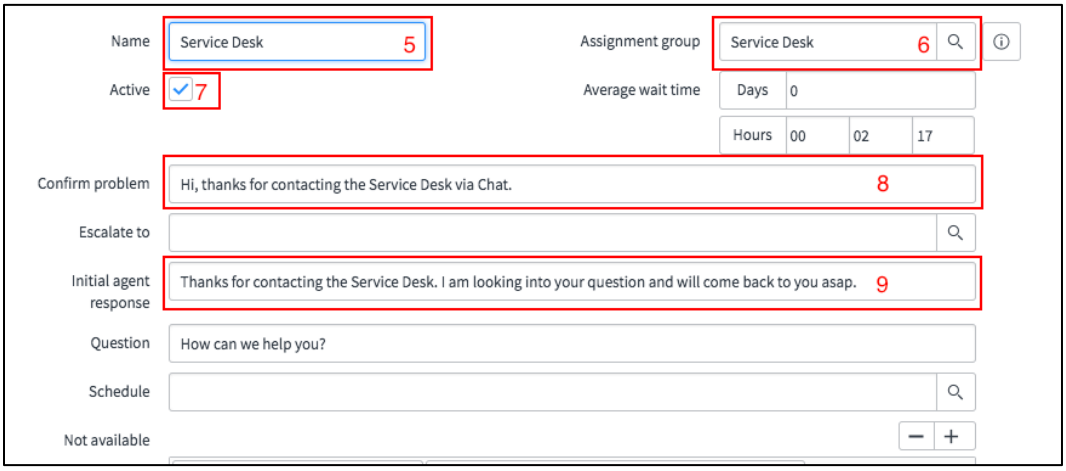
6. Set the Assignment group to **Service Desk.**

7. Ensure that it is set to **Active.**

8. You can modify the standard text. Change the Confirm problem field to "**Hi, thanks for contacting the Service Desk via Chat**."

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9. Initial agent response to "**Thanks for contacting the Service Desk. I am looking into your question now and will come back to you asap.**"

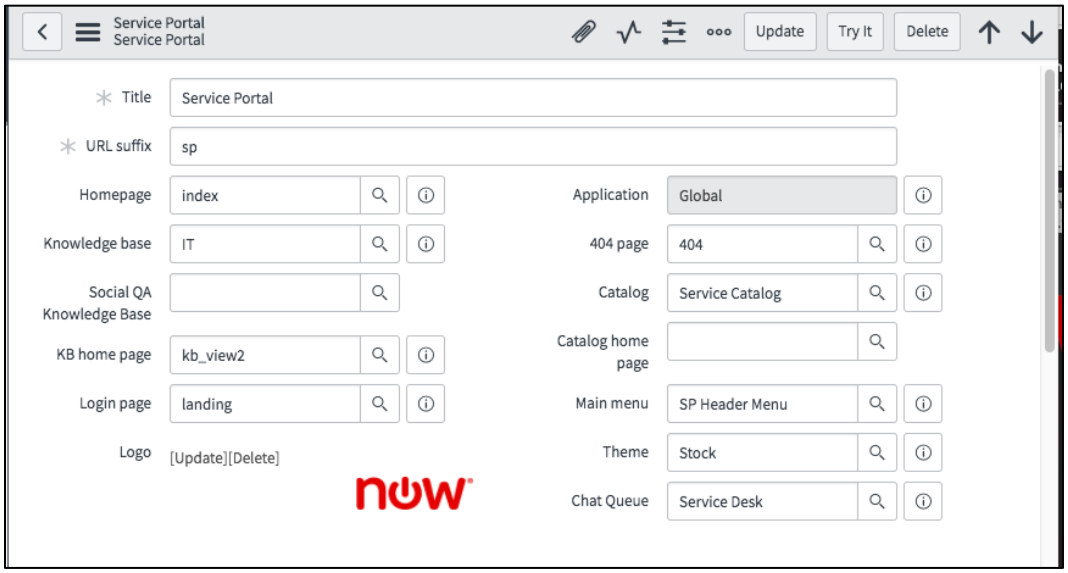


10. Click **Submit.**

Lab Success Verification

1. The Service Portal contains the Chat Queue **Service Desk**.

2. Click **Update**.



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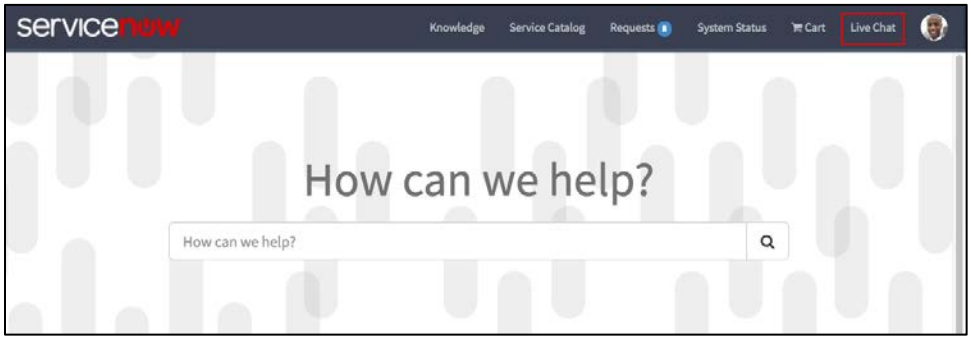
Lab Goal

This lab explains how to create an incident as an ITIL user by using the Connect Support capability.

Lab 2.2 Create Incident via Chat

Initiate a Connect Support Session

1. Navigate to your training instance.
2. Log on with **employee/Knowledge17** credentials.
3. Navigate to the **Service Portal Home** of your training instance by adding **/sp** to the URL.
4. Live Chat is now available in the upper-right corner of the screen. Click the **Live Chat** link on the Portal header.



5. A pop-up window opens with a welcome message from the Service Desk Chat queue.
6. Enter the following question into the text box:
   How can I connect my iPhone to the network when remote?
   Press **Send**.



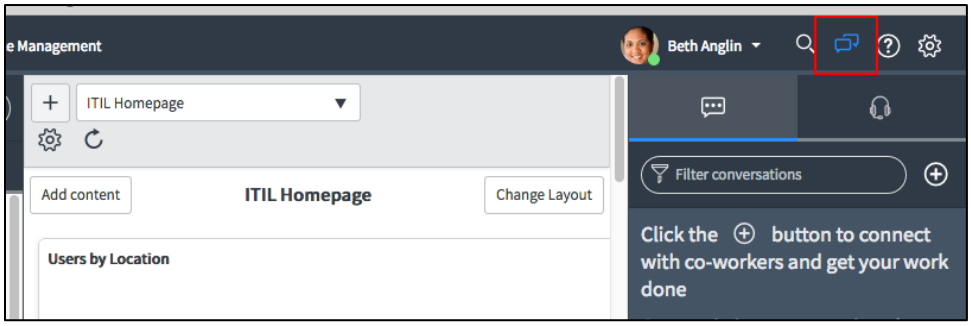
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7. To progress the chat, log onto the training instance using a different browser so that you can impersonate the Service Desk agent.

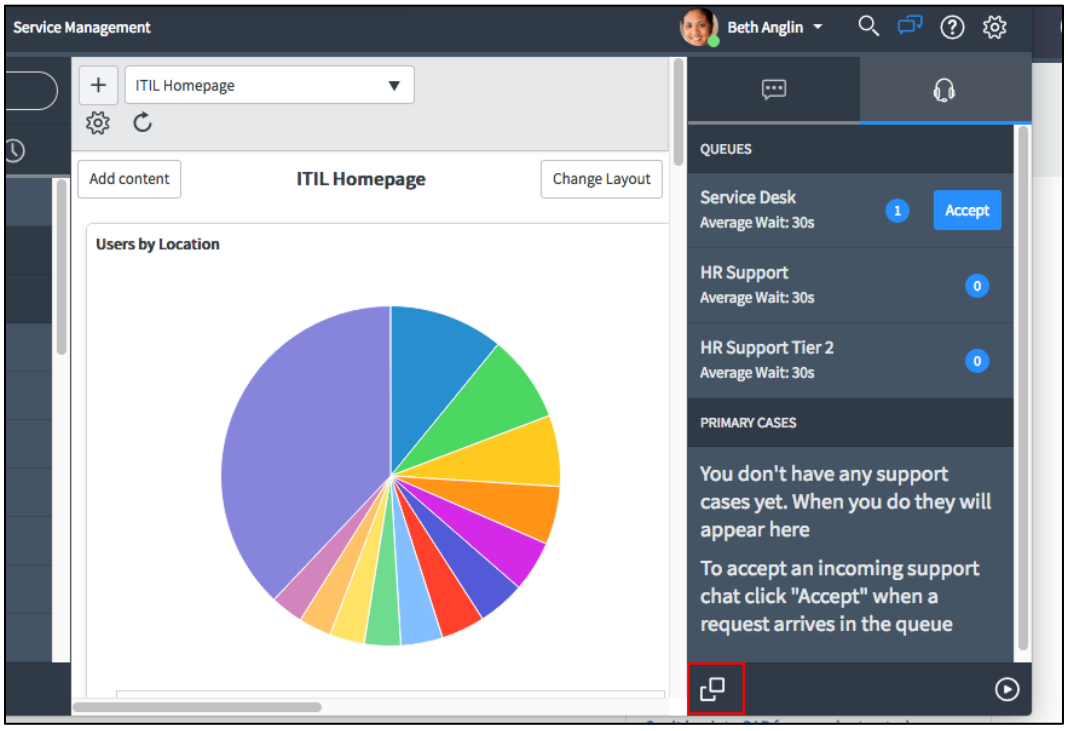
8. Open a different browser and navigate to the training instance.

9. Log in with **beth.anglin/Knowledge17** credentials.

10. Ensure the Connect Sidebar is visible by selecting the Connect icon in the header.



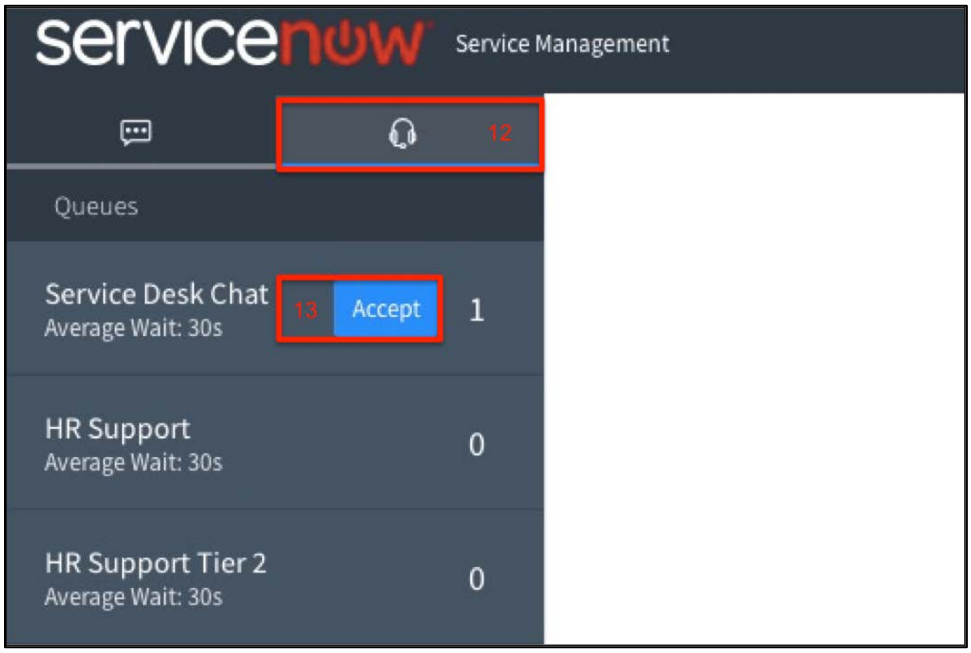
11. Open the full interface by clicking the **Connect standalone** interface icon at the bottom.



12. Click the **Support** tab ( )to view the active queues.

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13. Click **Accept** to join the conversation with **Joe Employee.**



14. Notice that after accepting the session, an automated message is sent to **Joe Employee** to allow you time to start diagnosing the question.

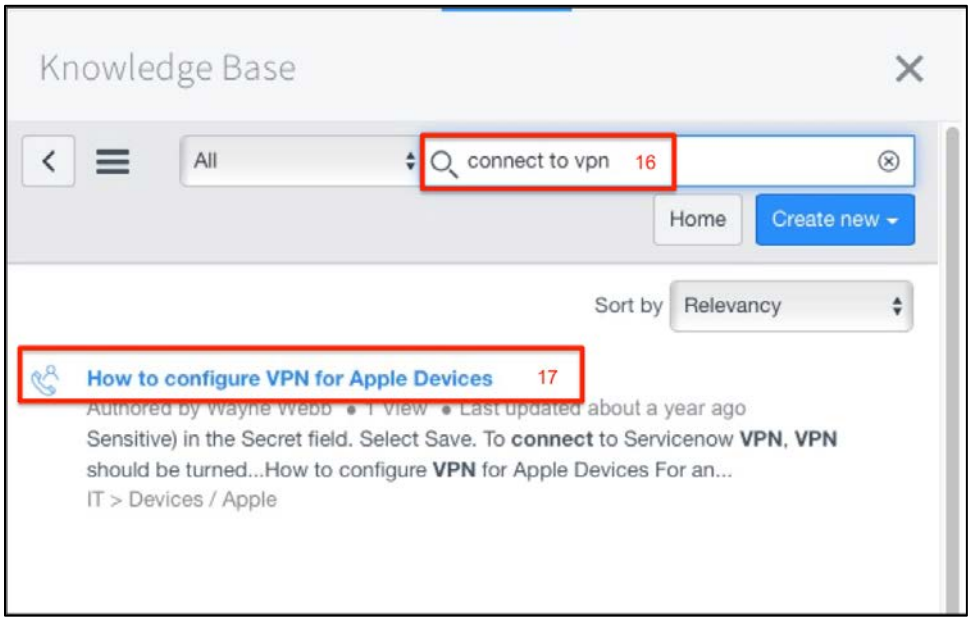
15. From Beth's browser session, open the **Knowledge Base** by clicking on the book icon in the header.



16. Type **connect to vpn** into the search input and press return to view results.

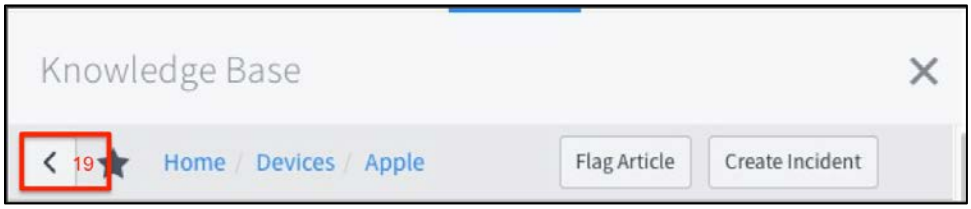
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17. Click the link for the Knowledge Article: **How to configure VPN for Apple Devices**.



18. This article looks like it might help, so send it to **Joe Employee** via the Chat session.

19. Click the back arrow to return to the Knowledge Search results.

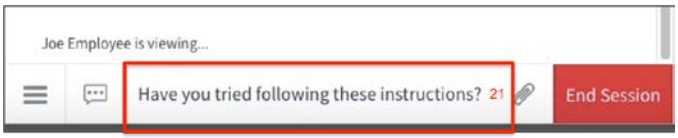


20. Drag and drop the Knowledge article onto the conversation.



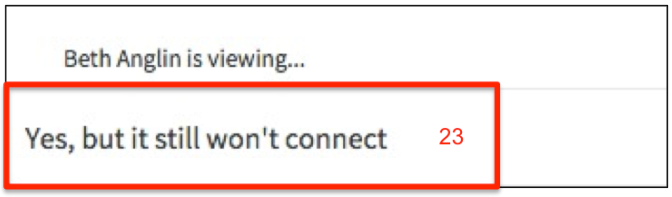
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21. Ask whether **Joe Employee** has tried following the instructions within the KB article.
    Have you tried following these instructions?



22. Switch back to the browser where you are logged in as **Joe Employee**.

23. Respond to **Beth Anglin** to let her know you tried the instructions but it still failed.
    Yes, but it still won't connect



24. Switch back to the browser where you are logged in as **Beth Anglin**.

25. Respond to **Joe Employee** and let him know you'll raise an Incident.
    Okay Joe, let me raise an Incident and we can start to investigate.



26. Open the action menu and select **Create Incident**.



27. The new Incident record opens on the right side of your window, Click **Submit**.



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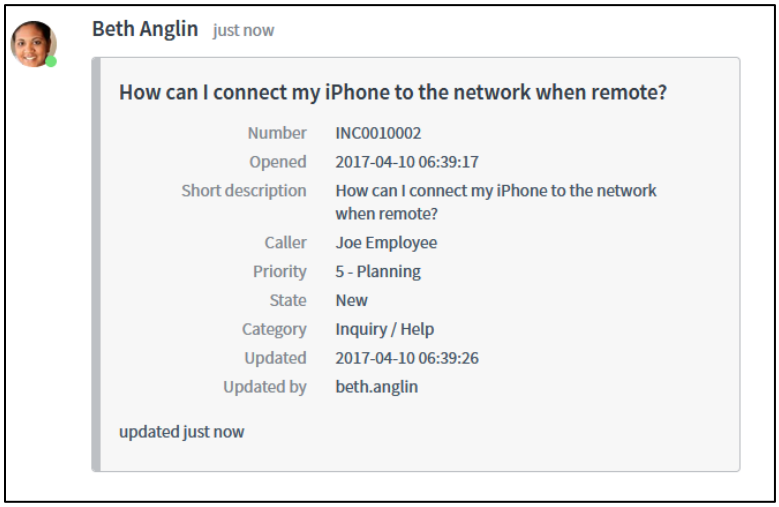
28. **Joe Employee** receives a link to the new Incident within his Chat session.

29. Go to **Incidents – Open** and **Drag and Drop** your two new incidents to bookmark them to the **Favorites**.

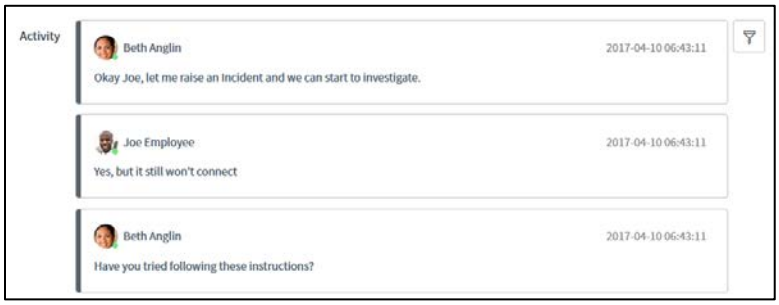
Lab Success Verification

1. Switch to the browser where you are logged in as **Joe Employee**.

2. Click the link to the newly created Incident.



3. Within the Incident Activity stream, you can see the complete conversation between **Joe Employee** and **Beth Anglin**.



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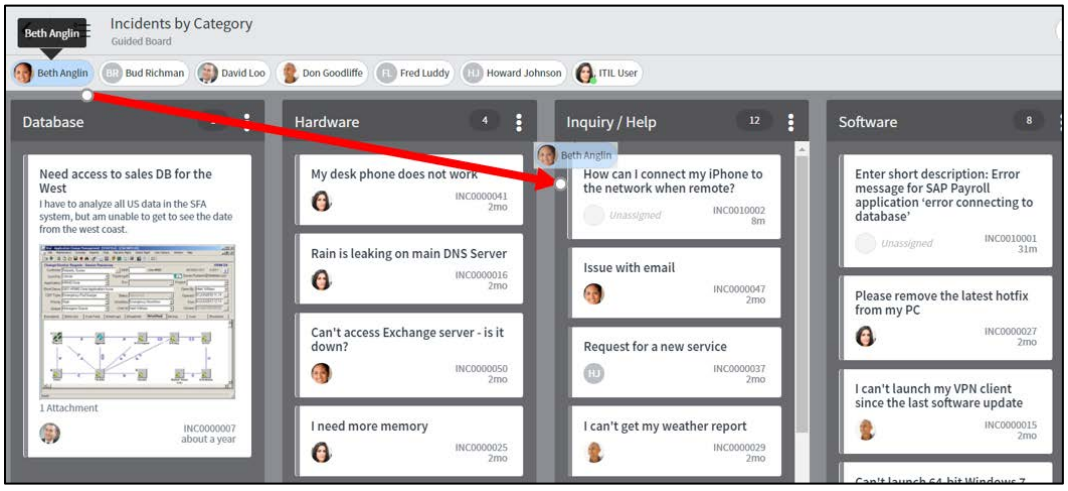
Lab Goal

This lab explains how to use a Visual Task Board to categorize and assign incidents.

Lab 2.3
Categorize and Assign

Visual Task Board

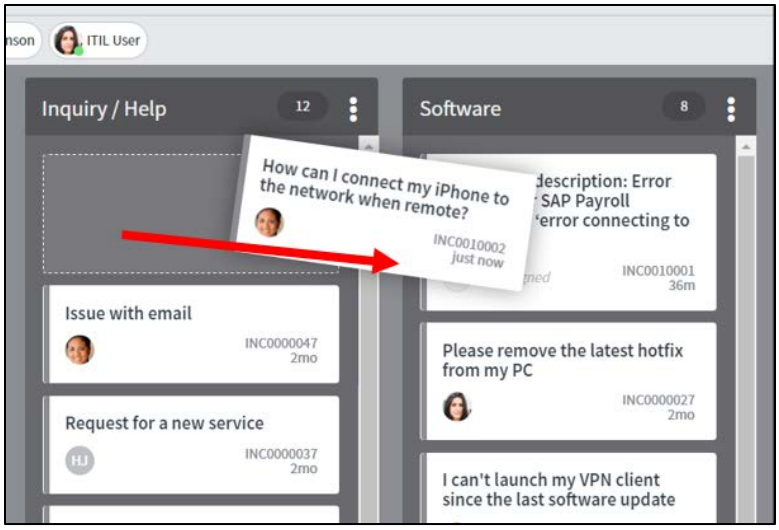
1. Navigate to your training instance.
2. Log on with **itil/Knowledge17** credentials.
3. Navigate to **Incident > Open**.
4. Click the ☰ icon in the header next to the Category column and select **Show Visual Task Board.**
5. Click the **<** icon in the bottom-left of the screen to make the Visual Task Board full screen.
6. Click the **X** to close the welcome message.
7. Click and hold the icon for **Beth Anglin** at the top of the page and drag it over the card saying **How can I connect my iPhone to the network when remote?** onto the **Primary** area.



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8. **Note**: Beth is now assigned to this incident. Also note that this is reflected in the activity bar on the right side of the screen.

9. Drag the card for **How can I connect my iPhone to the network when remote?** from the **Inquiry/Help** column into the **Software** column.



Note: This action changes the Category of the incident. Also note that this is reflected in the activity bar on the right side of the screen.

10. Click **Incident > Open** to return to the list view.

Lab Success Verification

1. The screen should look like the example.

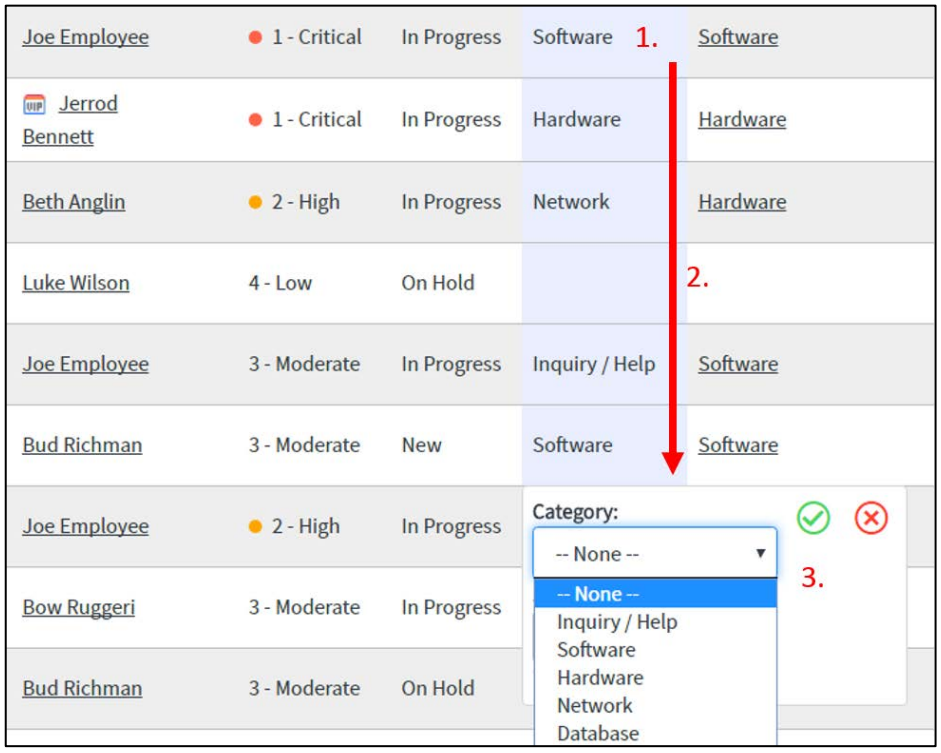


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Did you know?

You can perform a **mass update** of incident records in a list**.**

1. First **click a cell**.
2. **Hold the Shift key** and **move the mouse down** to other cells.
3. Then **double-click** one the blue highlighted cells to do a mass change.



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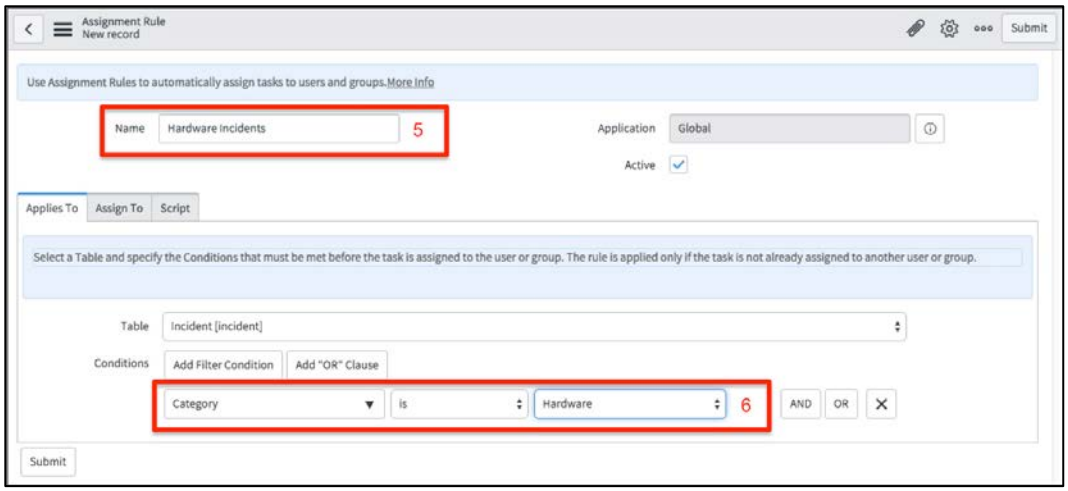
Lab Goal

This lab explains how to create an assignment rule to automatically set the Assignment Group.

Lab 3.1 Incident Automation Assignment Group

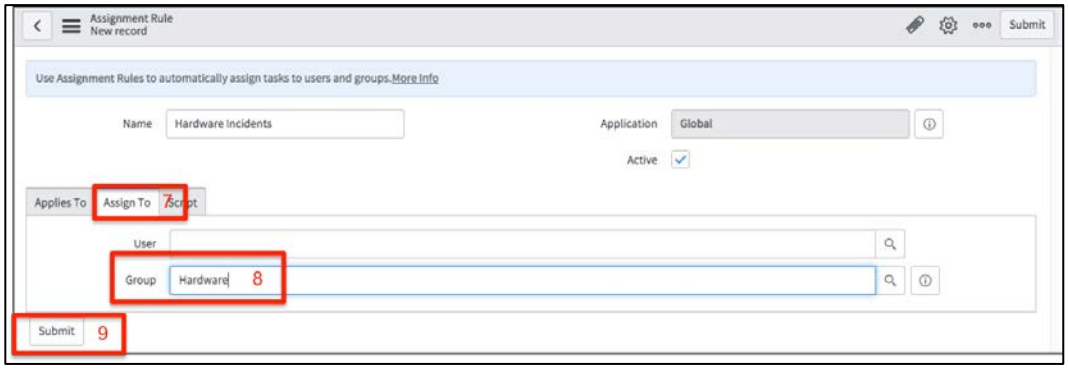
Create an Assignment Rule

1. Navigate to your training instance.
2. Log on with **admin/Knowledge17** credentials.
3. Navigate to **System Policy > Rules > Assignment**.
4. Click **New** to create a new Assignment Rule.
5. Set the Name to **Hardware Incidents**.
6. In the **Applies To** section, set the Condition to **Category is Hardware**.



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7. Select the **Assign To** tab.



8. In the **Assign To** section, set the Group to **Hardware**.

9. Click **Submit**.
   Note: To test the new Assignment Rule, create a new incident and set the Category to **Hardware**.

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

11. Set the Caller field to **Bow Ruggeri**.

12. Set the Short description to **Auto Assignment Rule**

13. Set the Category to **Hardware**.

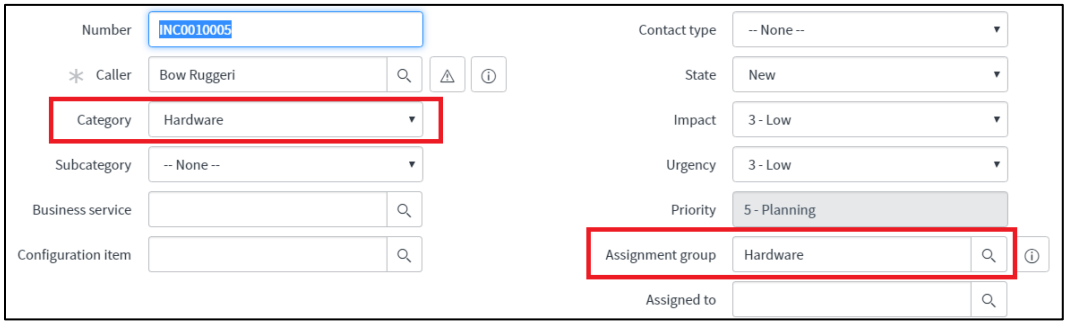
14. Click the ☰ icon at the top of the form and click **Save**.

15. Confirm that the Assignment Group changed to **Hardware.**

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Lab Success Verification

1. The screen should look like the example.



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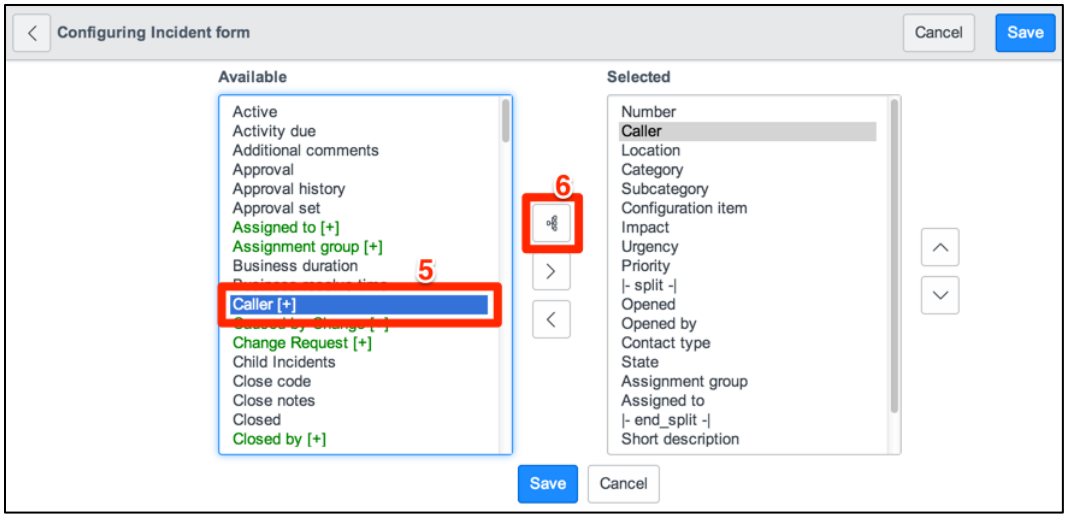
Lab Goal

This lab explains how to add an existing field to the incident form.

Lab 3.2 Configure Incident Form

Add an Existing Field to the Incident Form

1. Navigate to your training instance.
2. Log on with **admin/Knowledge17** credentials.
3. Navigate to **Incident > Open,** and open the incident you created (the caller is **Bow Rugeri**).
4. Click the ☰ icon at the top of the form and select **Configure > Form Layout**.
   Note: This brings up the incident form slushbucket, which lets you add existing fields to the form.
5. Select **Caller** on the left side.
6. After selecting **Caller**, click the reference field icon to expand the caller record.



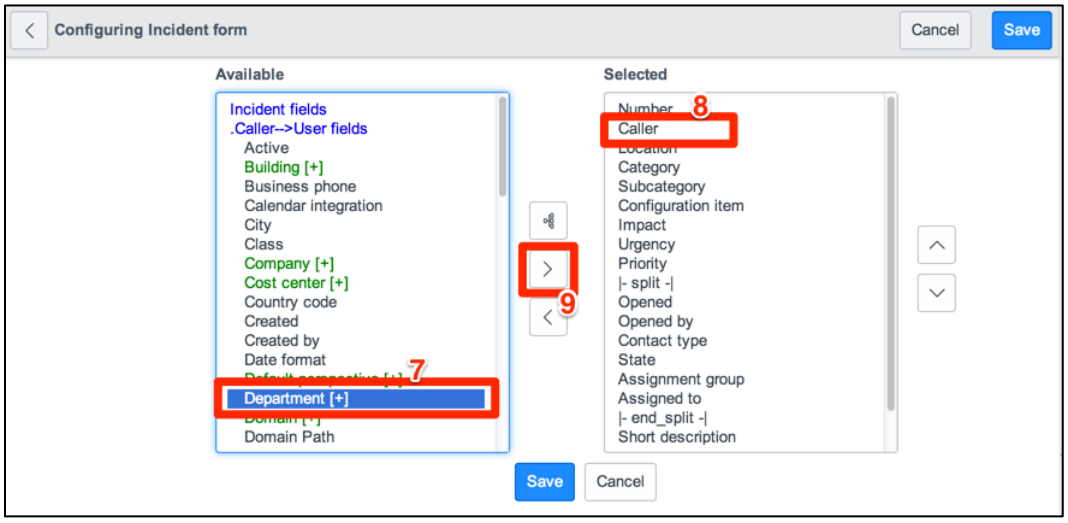
Note: When you click the plus sign, specific attributes of the user record display on the left.

7. On the left side, click **Department**.

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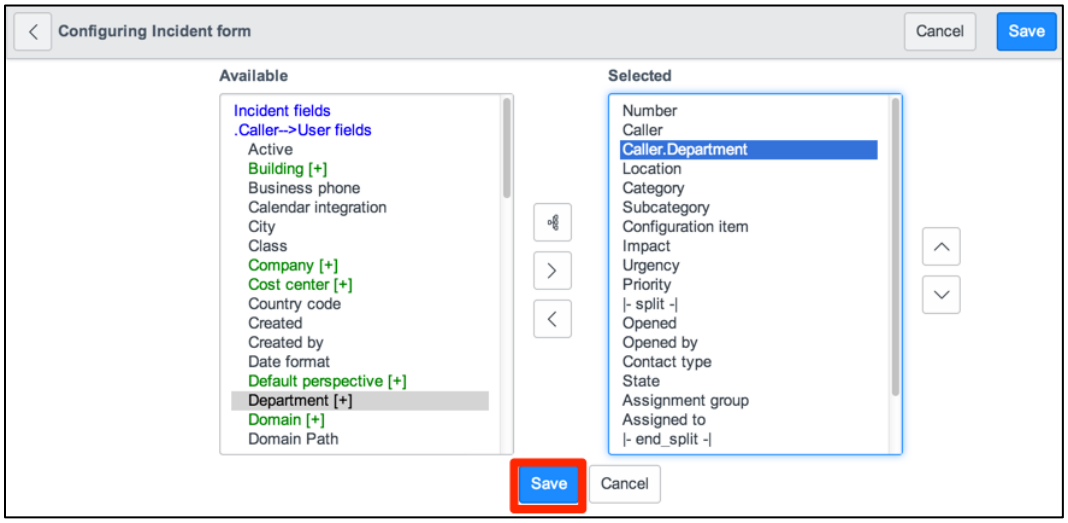
8. On the right side, click on **Caller**.
   Note: This determines where on the form the Department field displays.

9. Click the **Add** button.



Note: The **Caller. Department** field should now display below the Caller field.

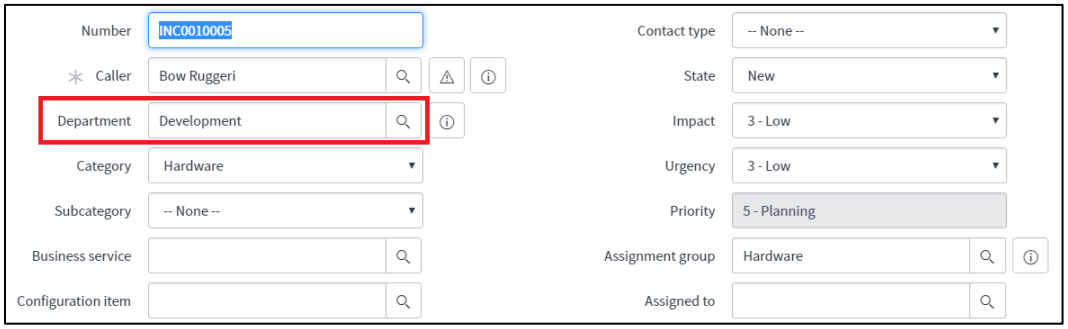
10. Click **Save**.



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Lab Success Verification

1. The screen should look like the example.



Challenge: Add the Caller's Manager and Manager's phone number to the form.

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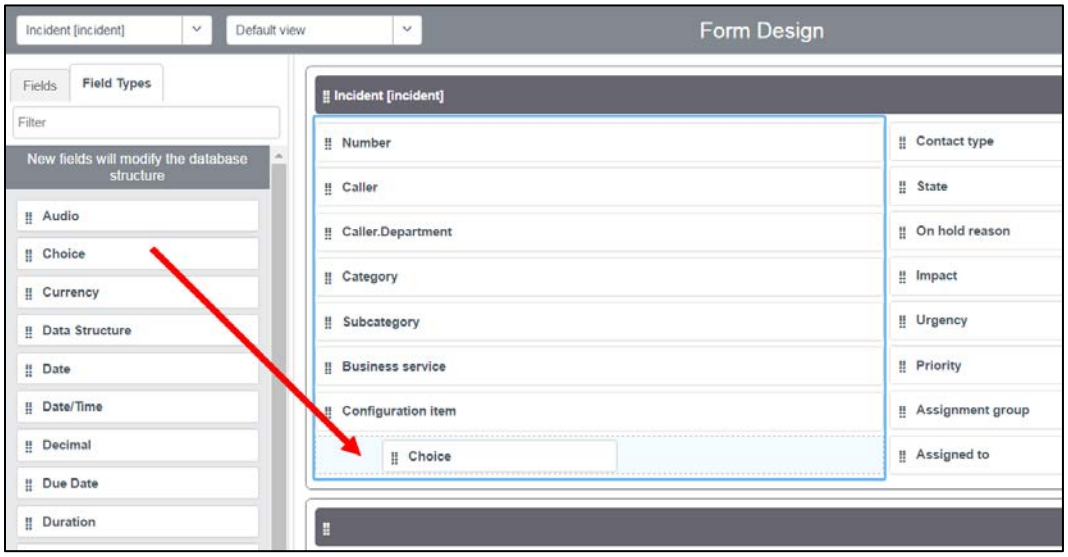
Lab Goal

This lab explains how to add a new drop-down field to the form and add choice values.

Lab 3.3 Configure Incident Form

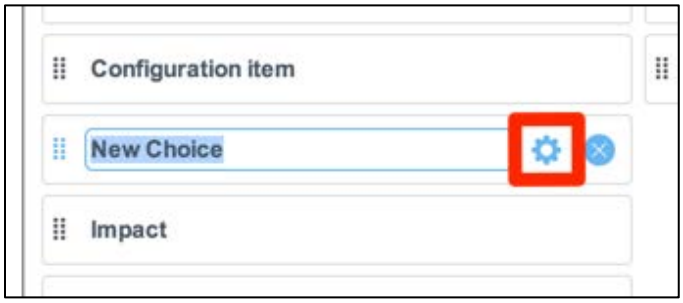
Add a New Field to the Incident Form

1. Navigate to your training instance.
2. Log on with **admin/Knowledge17** credentials.
3. Navigate to **Incident > Open,** and open the incident you created (the caller is **Bow Ruggeri**).
4. Click the ☰ icon and select **Configure > Form Design**.
5. On the top-left, select **Field Types**. This displays a list of different field types for the new field.
6. Select **Choice,** which is the first option in the list, and drag it onto the form below the **Configuration Item** field**.**

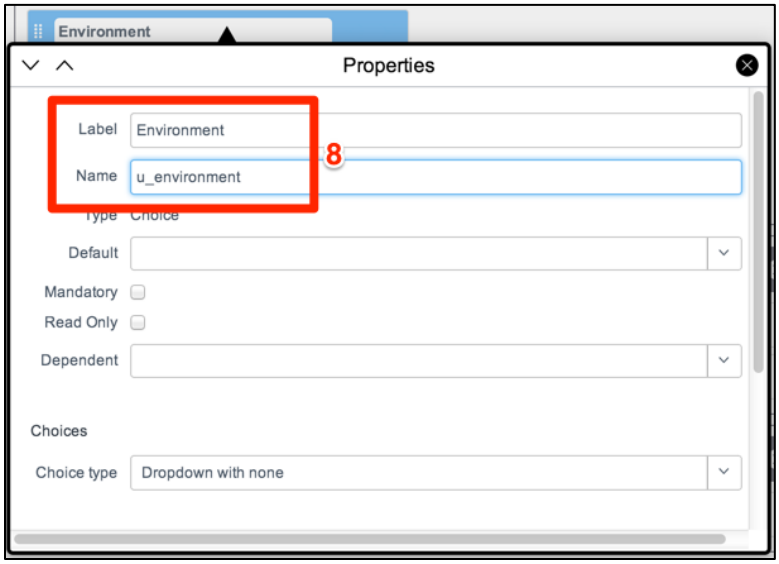


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7. Hover the mouse over the **New Choice** field, and click the Gear  Icon to configure the new field.



8. In the Properties window, set the Label to **Environment**, and the Name to **u_environment**.

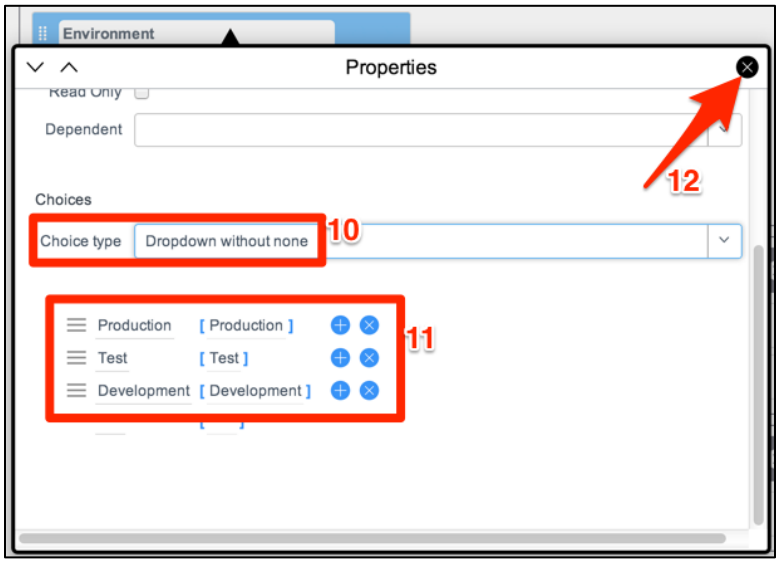


9. In the Properties window, scroll down to configure the choices for this field.

10. Change the **Choice type** to **Dropdown <u>without</u> none**.

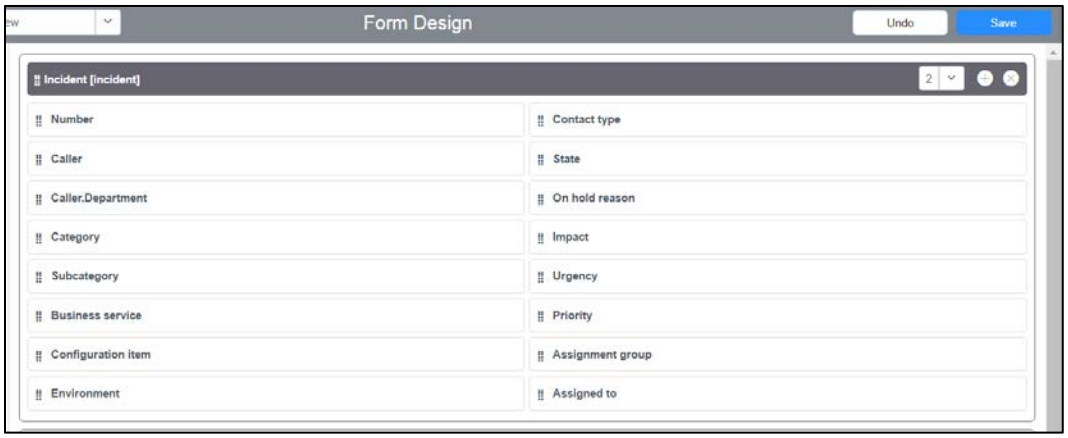
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11. In the choice section at the bottom, add the following items: **Production**, **Test**, **Development.**



12. Click **X** to save the changes.

13. After closing the Properties window, click **Save** in the top-right of the screen.



Note: After clicking **Save**, a progress bar appears.



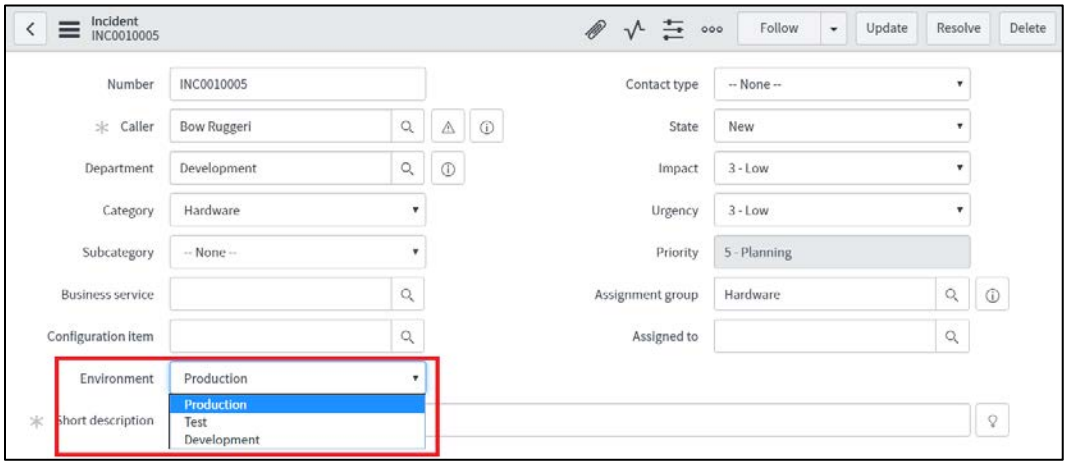
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14. After the progress bar completes, close the **Form Design** tab in the browser and return to the Incident form.

15. Click the ☰ icon at the top of the form and select **Reload Form**.

Lab Success Verification

1. The screen should look like the example.



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Lab Goal

This lab explains how to create a UI Policy to display the Environment field only if the Category is Software.

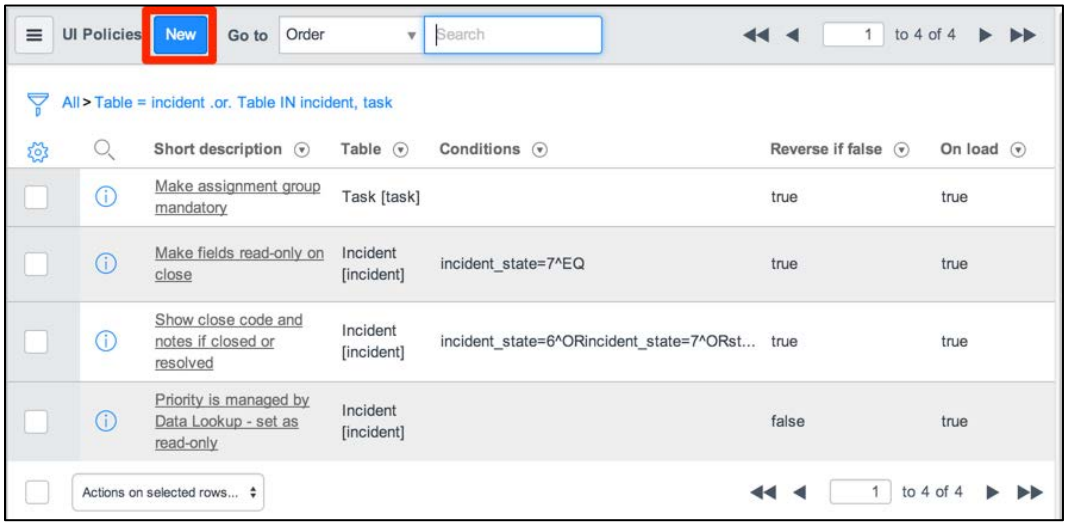
Lab 3.4 Configure Incident Form

Create a UI Policy for the New Field

1. Navigate to your training instance.
2. Log on with **admin/Knowledge17** credentials.
3. Navigate to **Incident > Create New** and enter the following settings:

   Caller: **Bud Richman**
   Short description: **Can't connect to production database**
   Category: **Database**

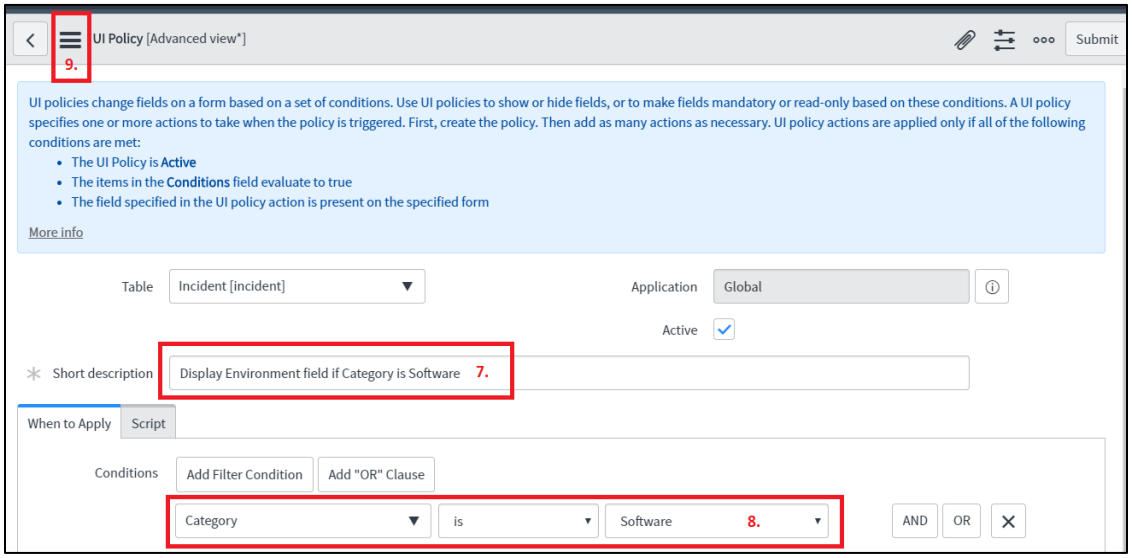
4. Click the ☰ icon at the top of the form and click **Save**.
5. Click the ☰ icon and select **Configure > UI Policies**.
6. Click **New** to create a new UI Policy.



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7. Add the following Short Description**: Display Environment field if Category is Software**.

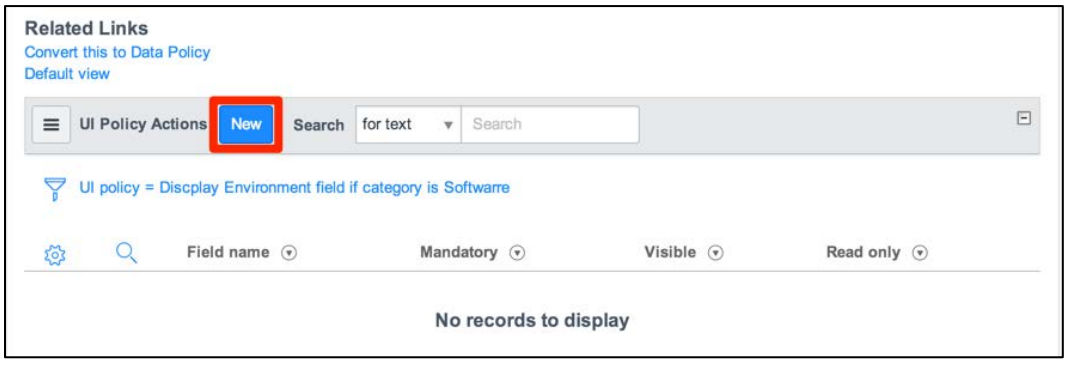
8. In the When To Apply section, use the **Condition Builder** to select **Category is Software**.



9. Click the ☰ icon at the top of the form and click **Save**.

10. After saving the form, **UI Policy Actions** displays at the bottom of the form.

11. Click **New** to create a UI Policy Action.

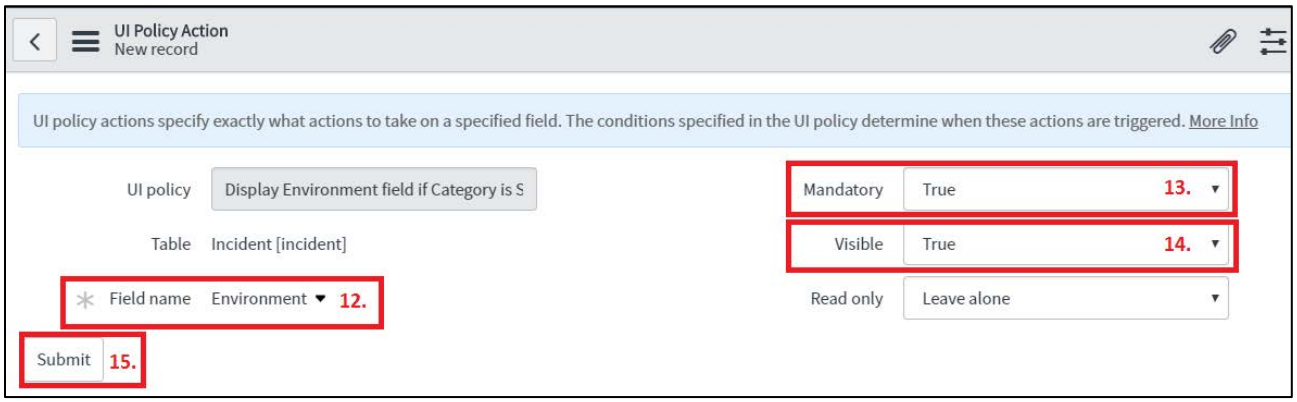


12. Set the Field Name to **Environment**.

13. Set Mandatory to **True**.

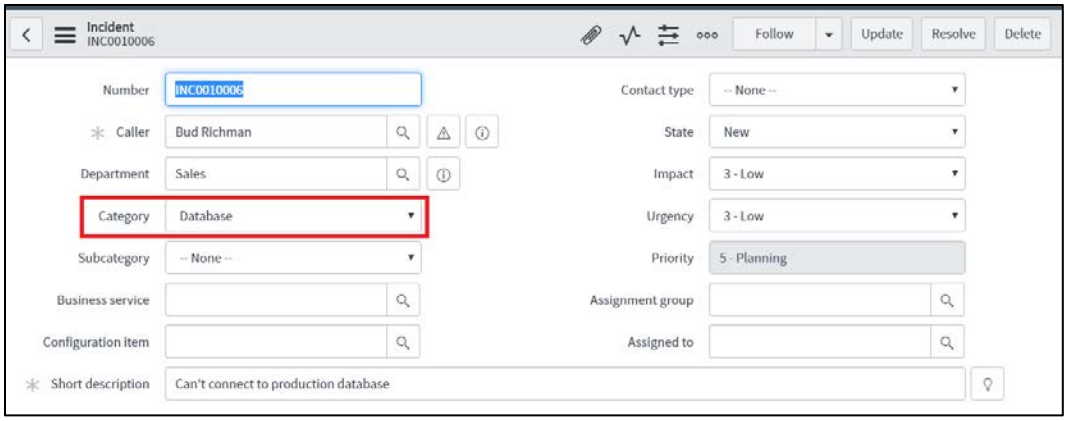
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14. Set Visible to **True**.



15. Click **Submit**.

16. Navigate to **Incident > Open,** and view the incident you created (the caller is **Bow Ruggeri**).
    Note: Since the Category is **Database**, the Environment field is not visible.

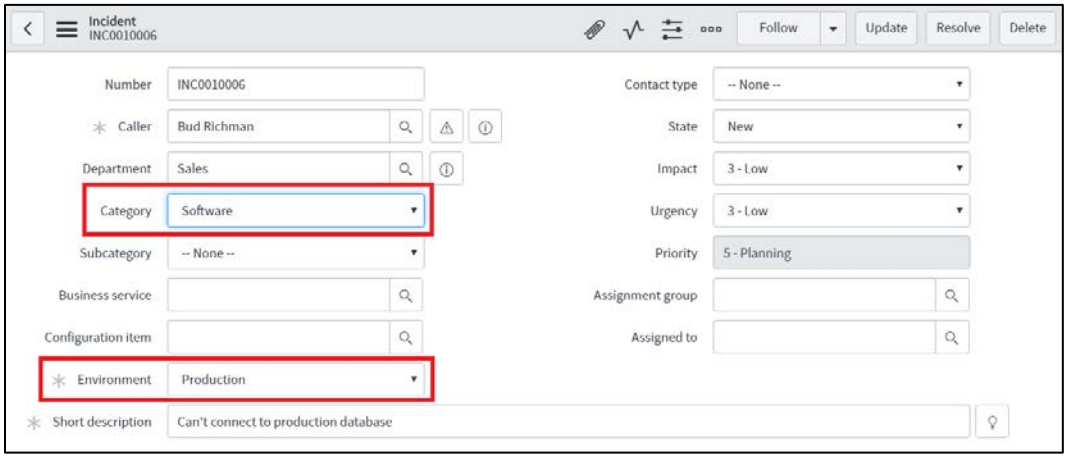


17. Change the Category to **Software**.
    Note: Since the Category is now **Software**, the Environment field is now visible and mandatory.

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Lab Success Verification

1. The screen should look like the example.



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Lab Goal

This lab explains how to create a Business Rule that sets the Assignment Group based on the Configuration Item support group.

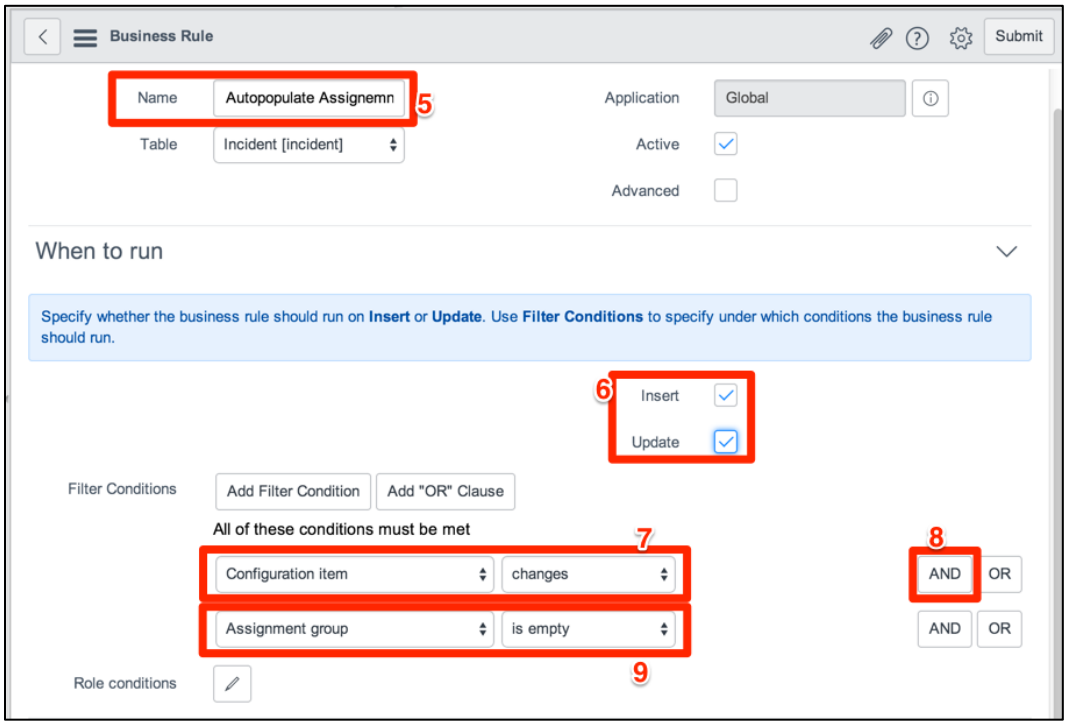
Lab 3.5 Incident Automation Assignment Group

Create a Business Rule to Set Assignment Group

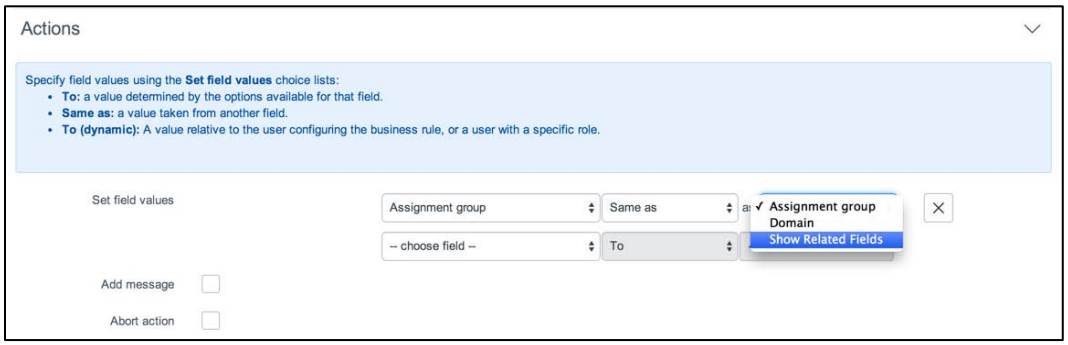
1. Navigate to your training instance.
2. Log on with **admin/Knowledge17** credentials.
3. Navigate to **Incident > Open**, right click the header and select **Configure > Business Rules.**
4. Click **New** to create a new Business Rule.
   Note: The Table is already populated with **Incident** because the starting point was the incident list.
5. Set the Name to **Autopopulate Assignment Group**.
6. In the **When to run** section, check the boxes for both **Insert** and **Update**.
7. Under Filter Conditions, select **Configuration Item – changes**.
8. Click **AND** to add another condition.

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9. Select **Assignment Group – is empty**.



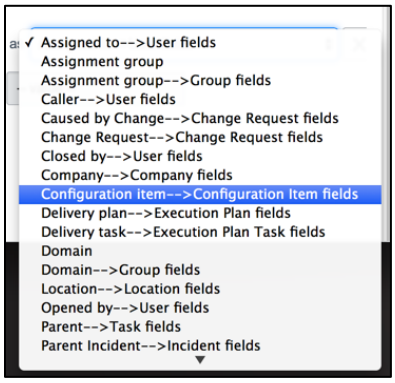
10. In the Actions section, change Set field values to **Assignment group – Same as – Show Related Fields**.



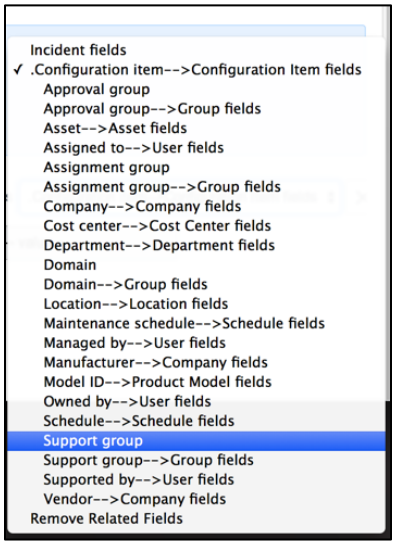
Note: By selecting Show Related Fields, you now have access to fields on other records. This is known as Dot-Walking.

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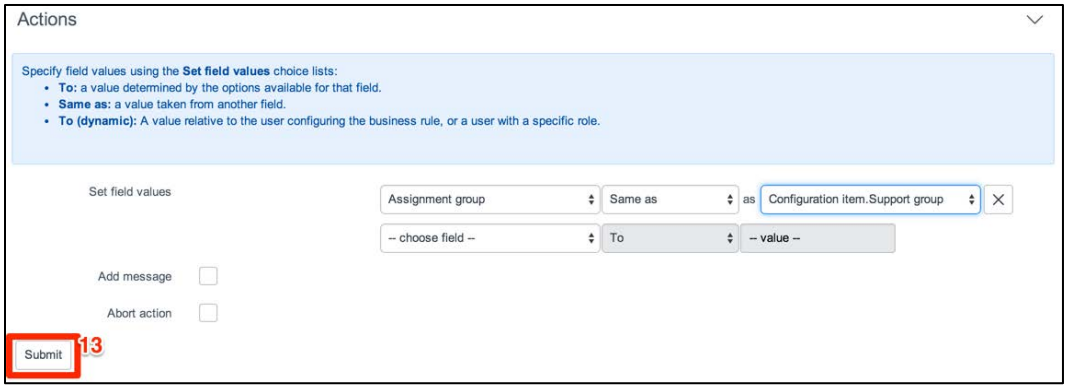
11. Click the same selection box again and select **Configuration Item --> Configuration Item fields**.



12. Click the same selection box again and select **Support Group**.



13. Click **Submit**.

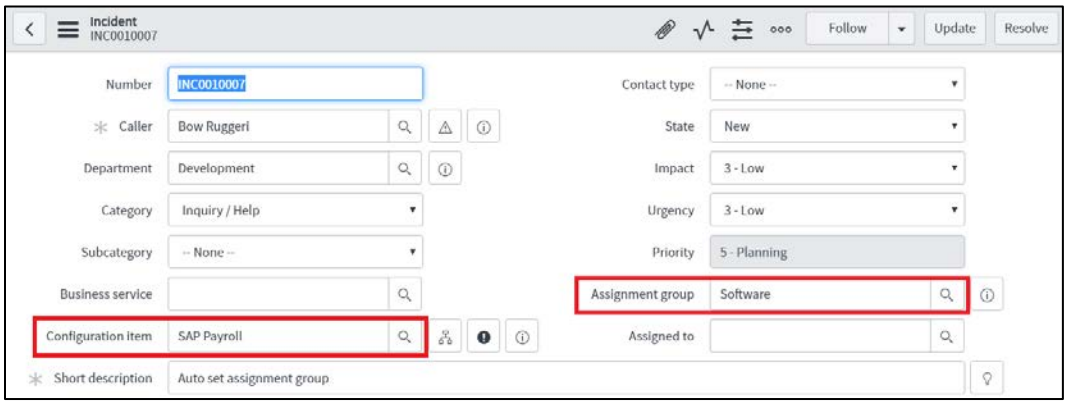


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Lab Success Verification

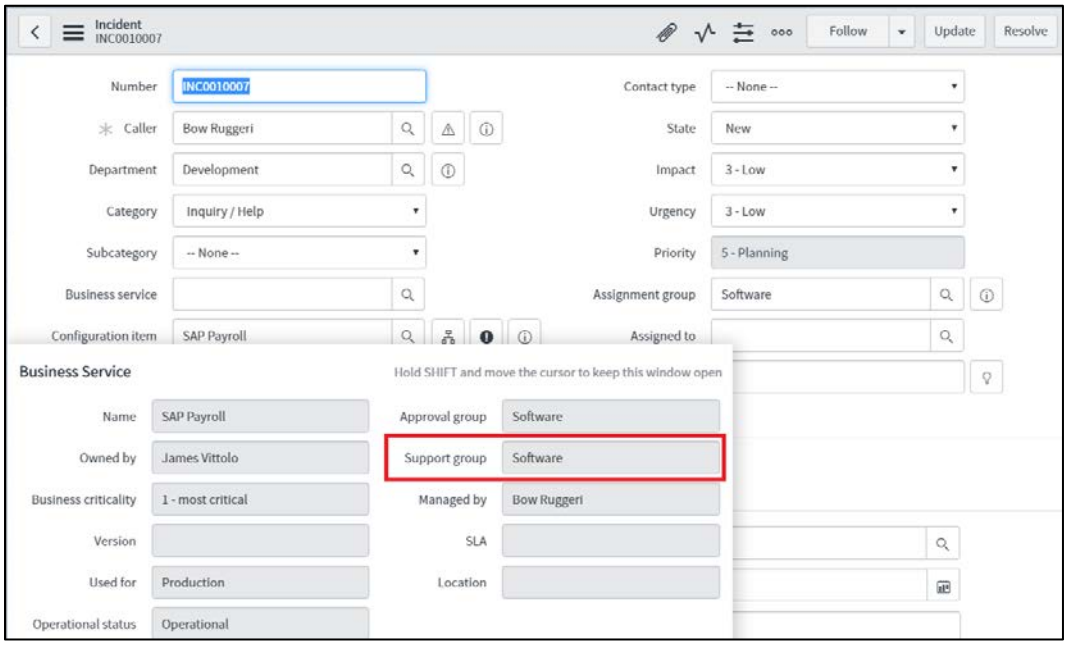
1. Create a new incident, give as short description **Auto set assignment** group, set caller to **Bow Ruggeri** and set the Configuration Item to **SAP Payroll**.

2. Click the ☰ icon at the top of the form and click **Save**.
   Note: The Assignment Group changes to **Software**.



3. Hover over the Record ⓘ icon next to the Configuration Item field to display information about **SAP Payroll**.

4. Confirm that the Support Group for SAP Payroll is **Software**.



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Lab Goal

This lab explains how to leverage the Knowledge Base from within an Incident. In this example, the incident was created based on a phone call by Joe employee.

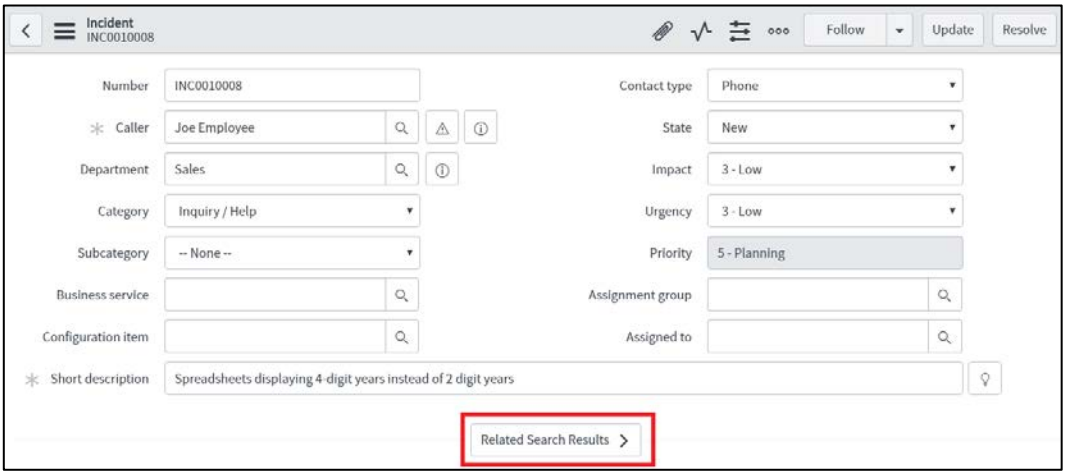
Optional Lab 4.1 Investigate and Diagnose

Use Knowledge to Help Resolve an Incident

1. Navigate to your training instance**.**
2. Log on with **itil/Knowledge17** credentials.
3. Navigate to **Incident > Create New** and enter the following settings:

   Caller: **Joe Employee**
   Contact type: **Phone**
   Short description: **Spreadsheets displaying 4-digit years instead of 2 digit years**

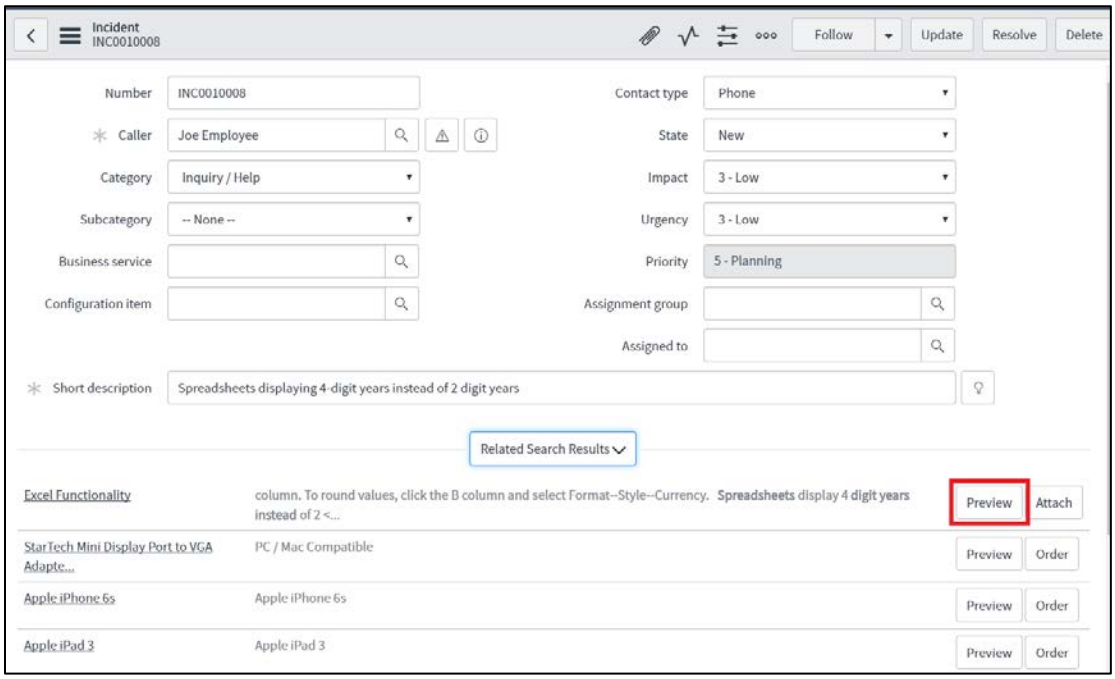
4. Click the ☰ icon at the top of the form and click **Save**.



5. **Expand** the Related Search Results section, if it is collapsed.

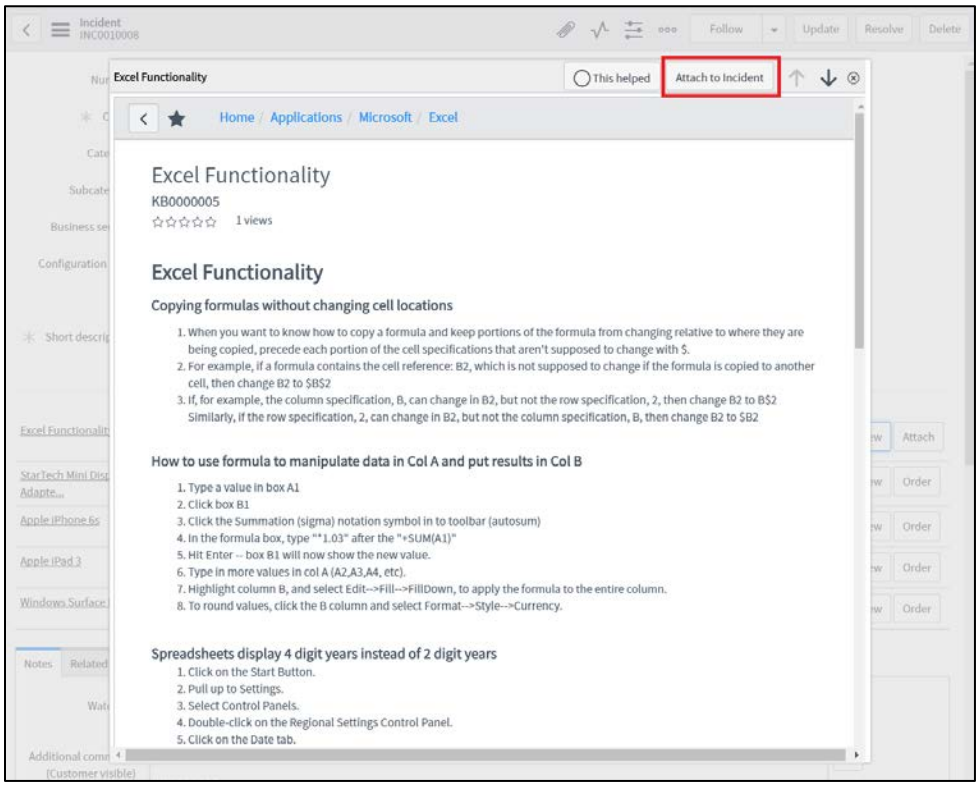
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6. Click **Preview** to view the first suggested Knowledge article under **Related Search Results**.



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7. After viewing the article, click **Attach to Incident**.

8. 

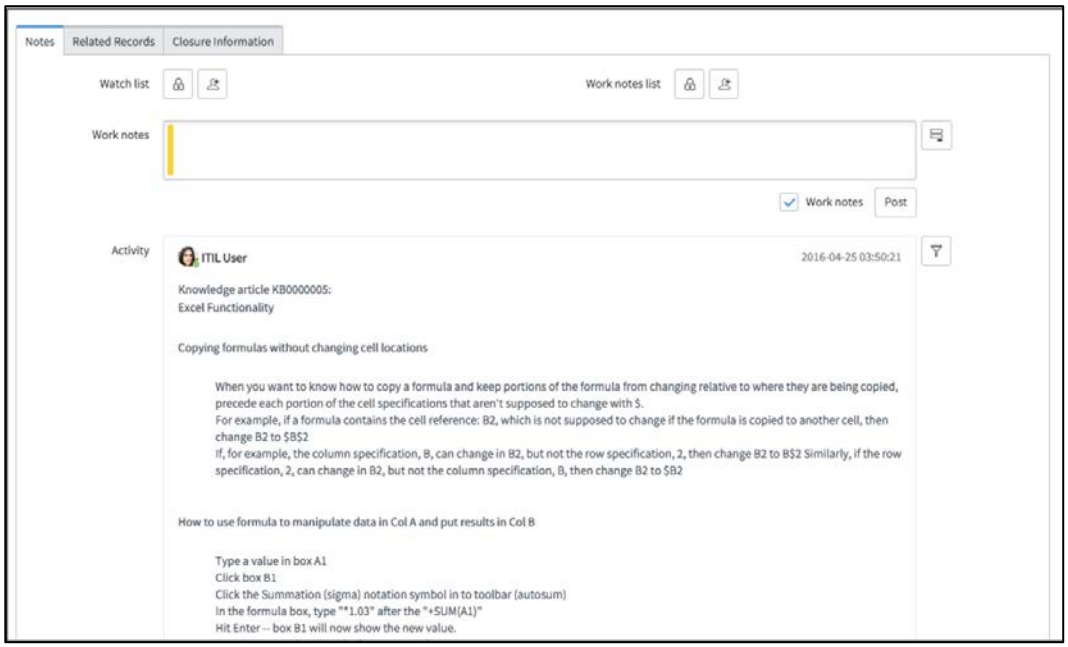
Note: The article is placed into the comments field of the incident in raw HTML format.

9. Click the ☰ icon at the top and click **Save**.
Note: The article now displays in the Activity log in formatted HTML.

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Lab Success Verification

1. The screen should look like the example.



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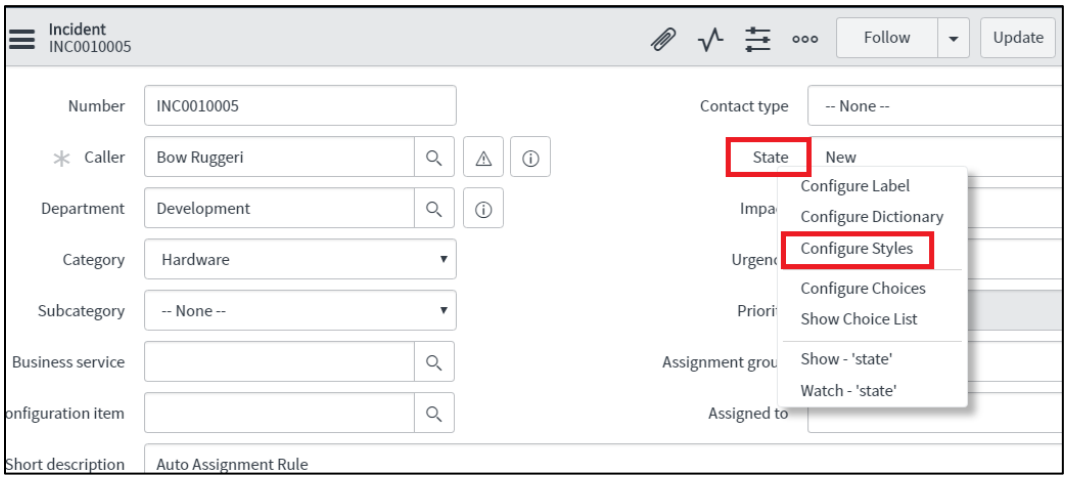
Lab Goal

This lab explains how to create a style to highlight certain stages.

Optional
Lab 4.2
Change Style

Change Style

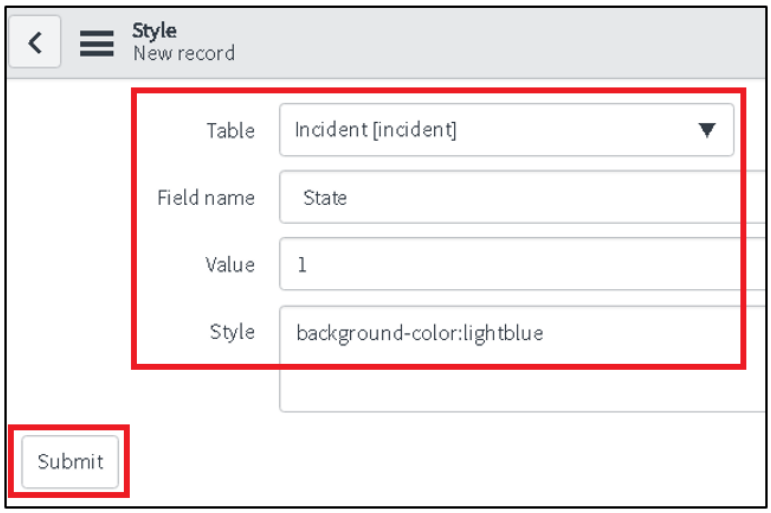
1. Navigate to your training instance.
2. Log on with **admin/Knowledge17** credentials.
3. Navigate to **Incident > Open**.
4. Open any incident in the State **New**.
5. Right-click **State** and click **Configure Styles**.



6. Click **New.**
7. Set value to **1** (this represents incidents in state New).

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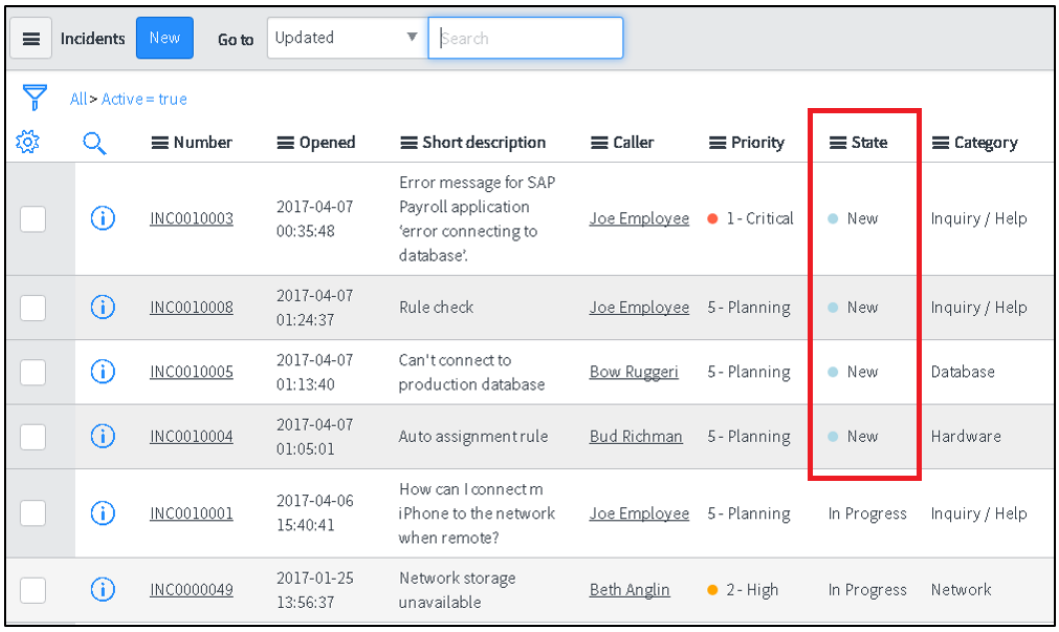
8. Set style to **background-color:lightblue**,



9. Click **Submit.**

Lab Success Verification

1. Go to **Incident > Open**.



2. **Verify** that incidents with State New now have a light-blue color style attached.

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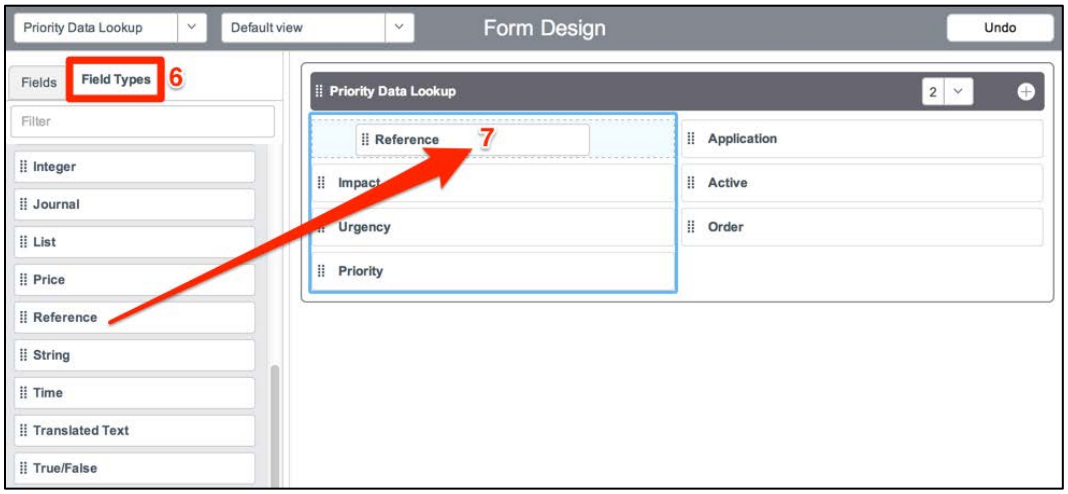
Lab Goal

The Service Desk wants to make sure that any incidents opened by Fred Luddy are of high priority. This lab explains how to set priorities automatically.

Optional
Lab 4.3
Incident Automation
Set Priorities

Modify the Priority Lookup Rules

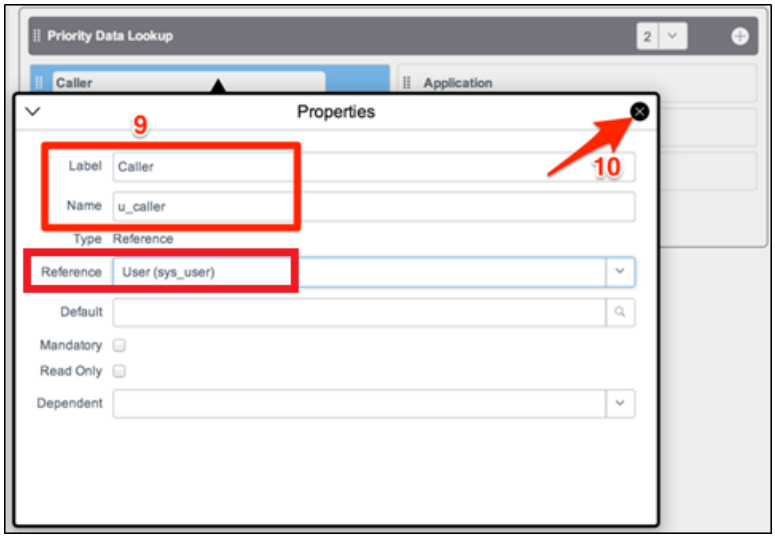
1. Navigate to your training instance.
2. Log on with **admin/Knowledge17** credentials.
3. Navigate to **System Policy > Rules > Priority Lookup Rules**.
4. Click **New** to create a new Priority Lookup.
5. Click the ☰ icon at the top of the form and select **Configure > Form Design**.
6. On the top-left, select **Field Types**. This displays a list of different field types for the new field.
7. Select **Reference**, and drag it onto the form above the **Impact** field.



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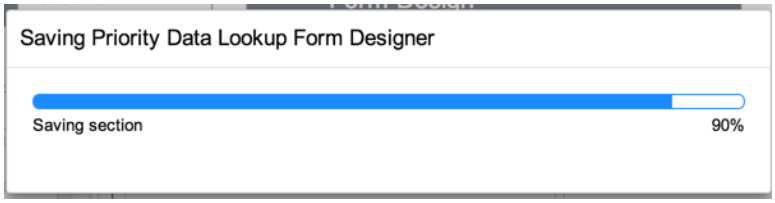
8. Hover the mouse over the **New Reference** field, and click the Gear  Icon to configure the new field.

9. In the Properties window, set the Label to **Caller**, the Name to **u_caller** and the reference to **User (sys_user)**.



10. Click **X** to save the changes.

11. After closing the Properties window, click the **Save** button in the top-right of the screen. **Note**: After clicking **Save**, a progress bar appears.



12. After the changes are saved, close out the **Form Design** tab in the browser and return to the Priority Data Lookup form.

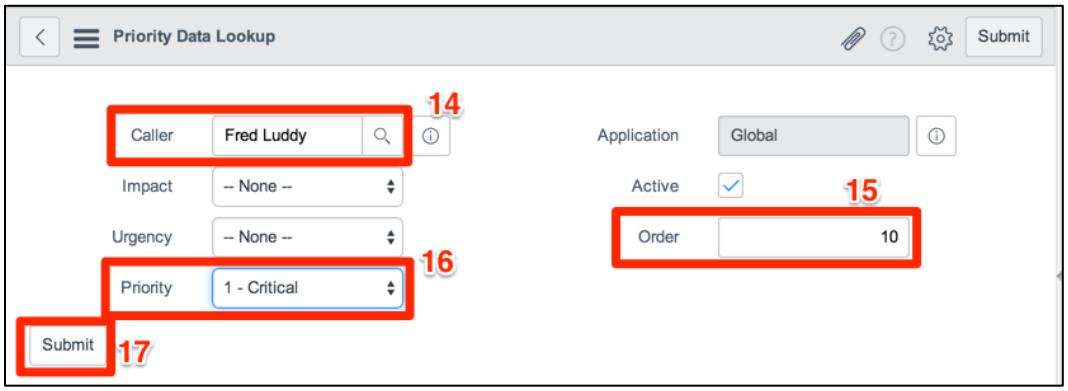
13. Click the  icon at the top of the form and select **Reload Form**.

14. After the Priority Data Lookup form reloads, set the Caller field to **Fred Luddy**.

15. Set the Order field to **10**.

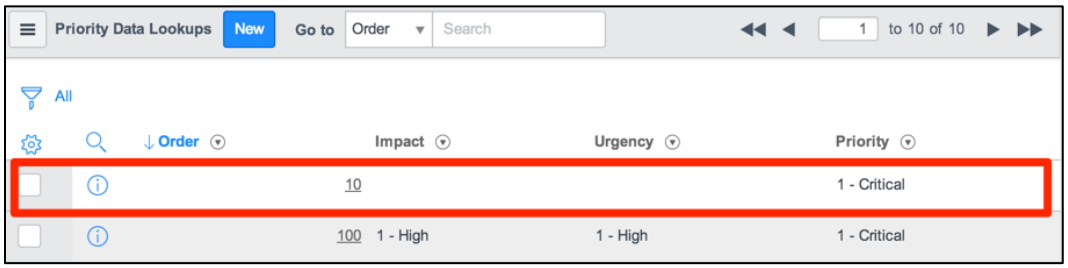
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16. Set the Priority field to **1 - Critical**.



17. Click **Submit**.

18. The screen should look like the example:

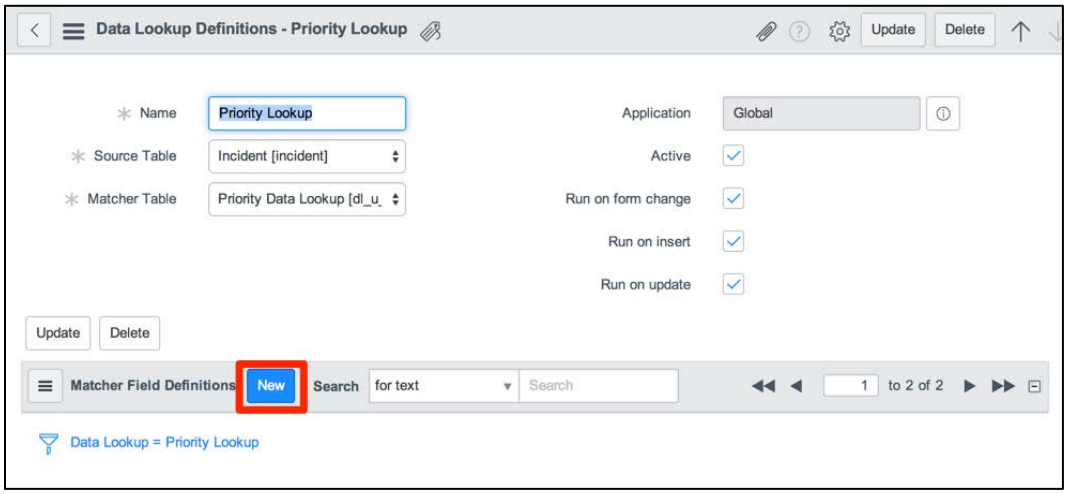


19. Navigate to **System Policy > Rules > Data Lookup Definitions**.

20. Click to open **Priority Lookup**.

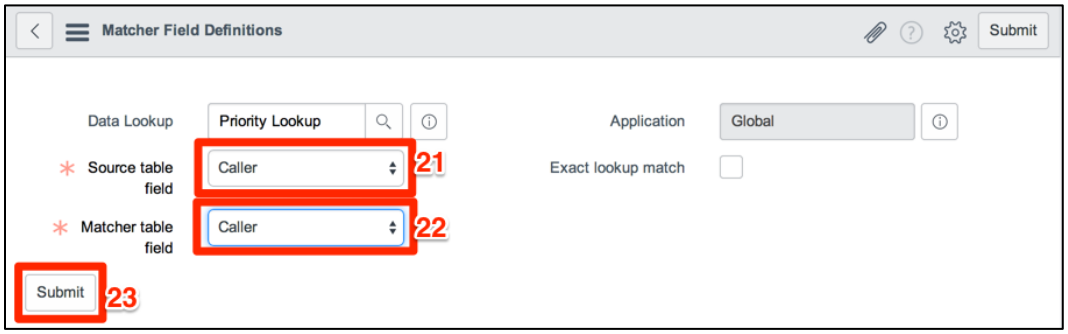
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21. Under the Matcher Field Definitions section, click **New**.



22. Set the **Name Source** table field to **Caller**.

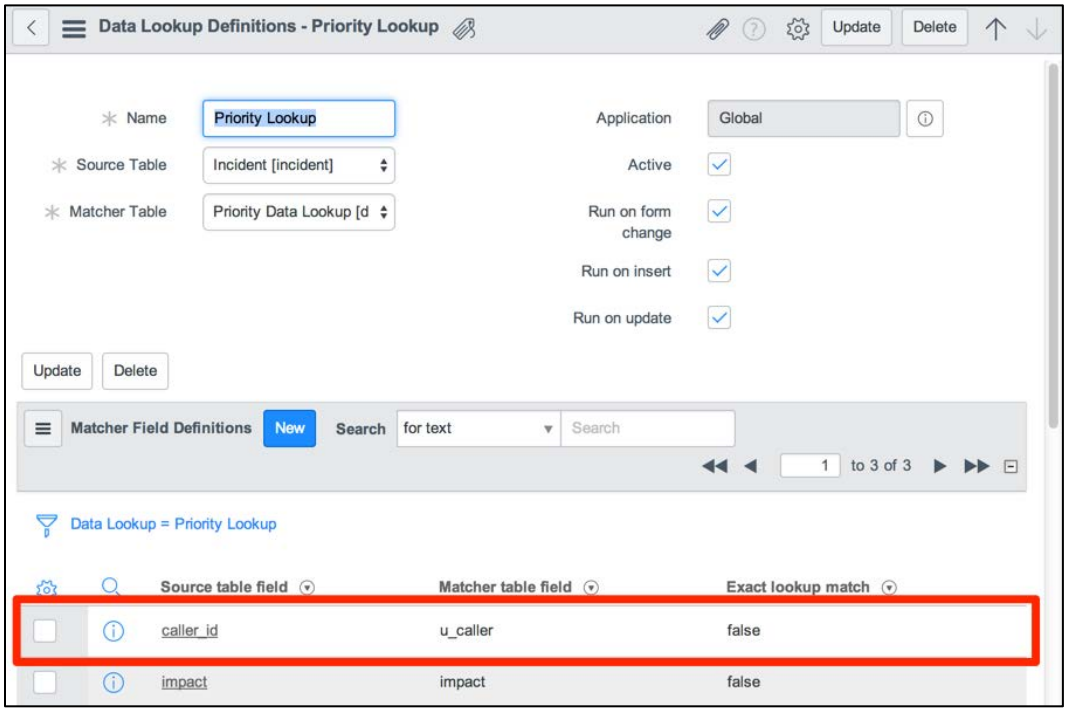
23. Set the **Matcher** table field to **Caller**.



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24. Click **Submit**.

    The screen should look like the example:



Lab Success Verification

1. Create a new incident.
2. Set the caller to be **Fred Luddy**.
3. Verify that Priority is **1 – Critical**.

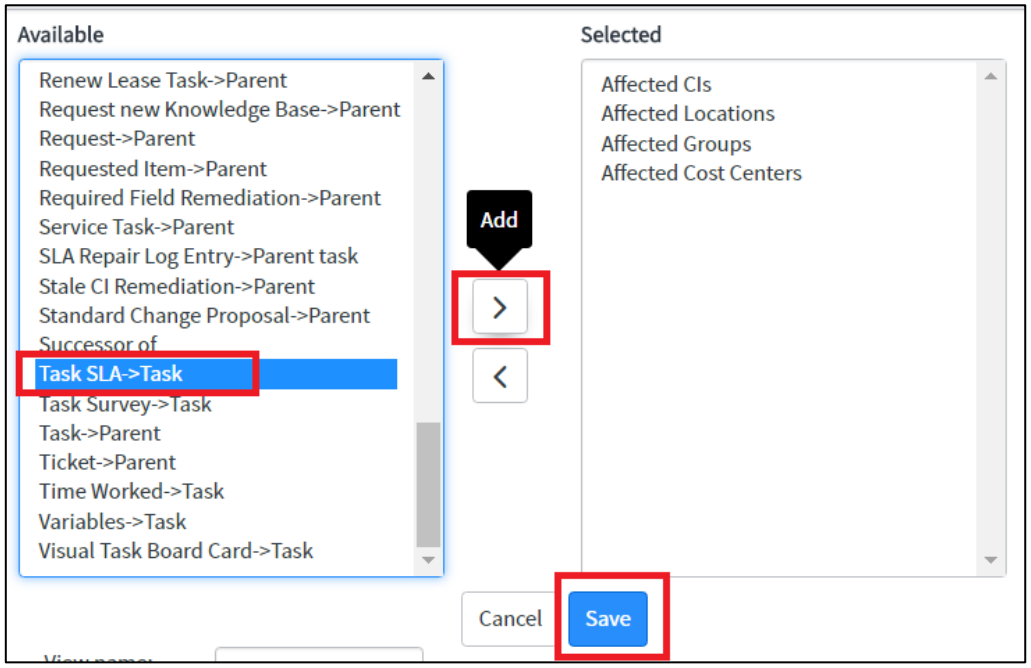
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Did you know?

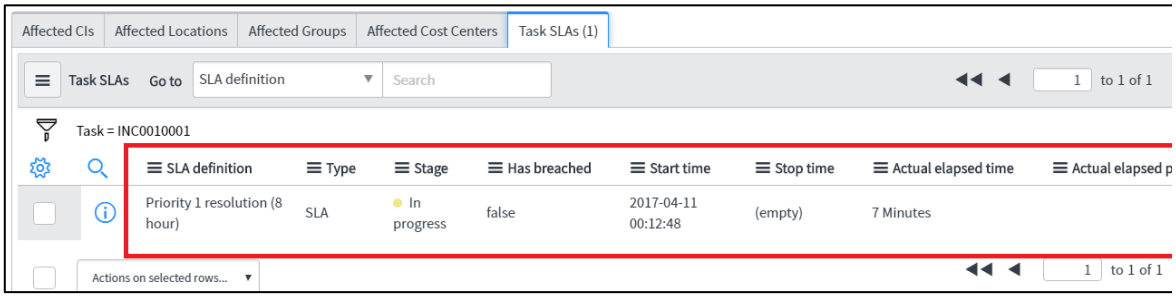
You can see the SLAs for an incident in the related list.

1. As an administrator click in the incident form the ☰ icon at the top and select **Configure > Related Lists**.

2. Add **Task SLA -> Task** to the form and **Save.**



3. Scroll down to the bottom of the incident and you see the SLA and its status.



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Lab Goal

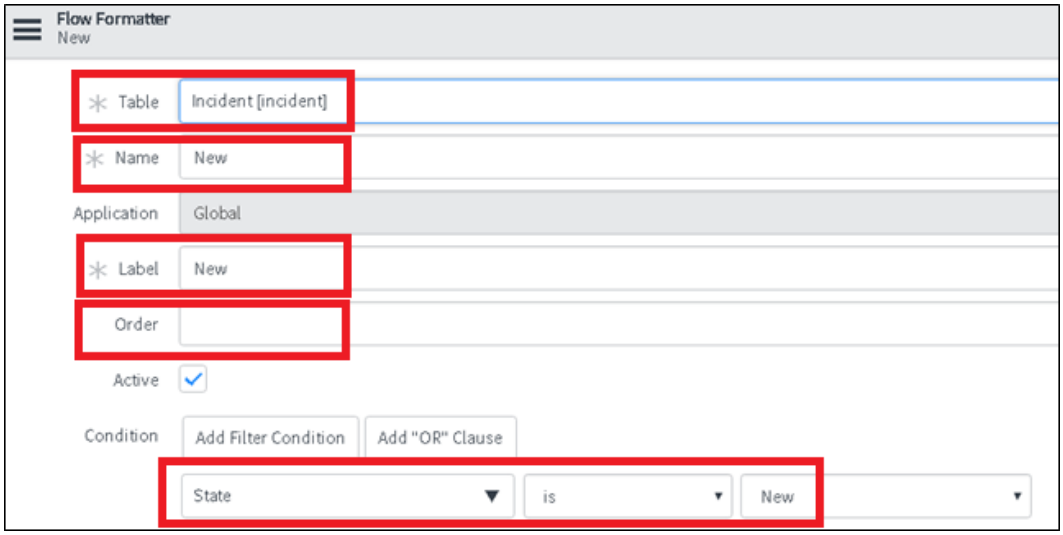
This lab explains how to add a Process Flow Formatter to the incident form.

Optional Lab 4.4 Add Flow Formatter to Form

Use Knowledge to Help Resolve an Incident

1. Navigate to your training instance**.**
2. Log on with **admin/Knowledge17** credentials.
3. Navigate to **System UI > Process Flow.**
4. Click **New** and enter the following settings:

   Table: **Incident [incident]**
   Name: **New**
   Label: **New**
   Order: **100**
   Condition: **State is New**



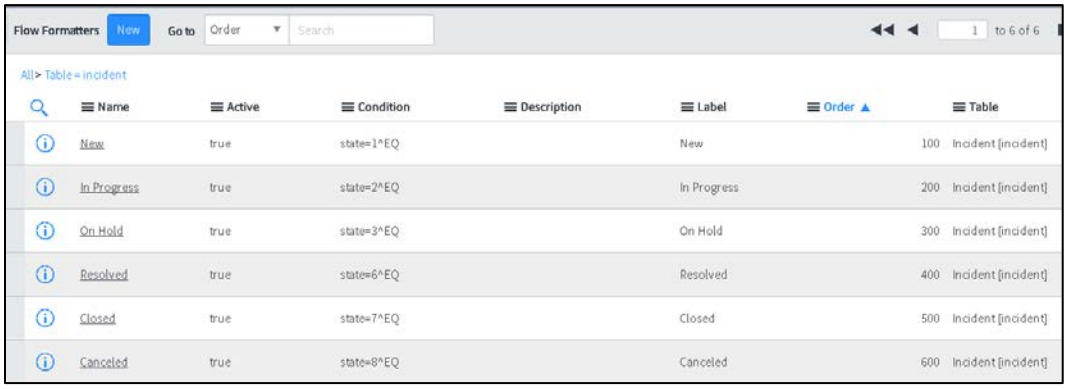
5. Click **Submit.**

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6. Repeat Steps 4 to 10, where table is always **Incident [incident]** and where the Steps 6 to 9 set as follows:

Name	Label	Order	State is
In Progress	In Progress	200	In Progress
On Hold	On Hold	300	On Hold
Resolved	Resolved	400	Resolved
Closed	Closed	500	Closed
Canceled	Canceled	600	Canceled

7. When finished, the table looks like the example.



8. Go to **Incident > Open**

9. **Open** any incident.

10. Click the ☰ icon and select **Configure > Form Design**.

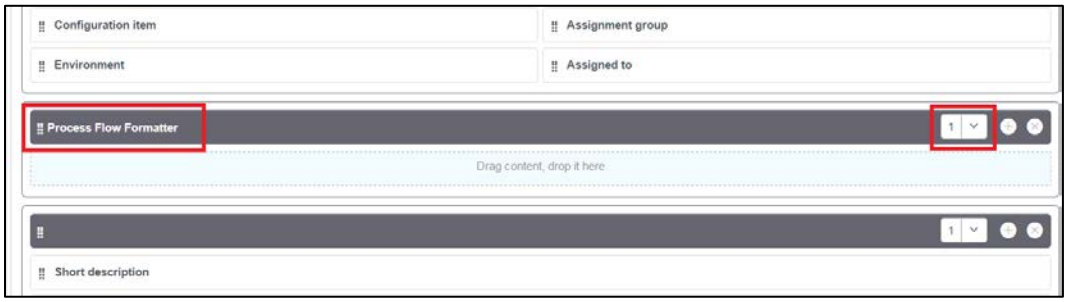
11. In the top-right area of the designer, click **Add a new section**.



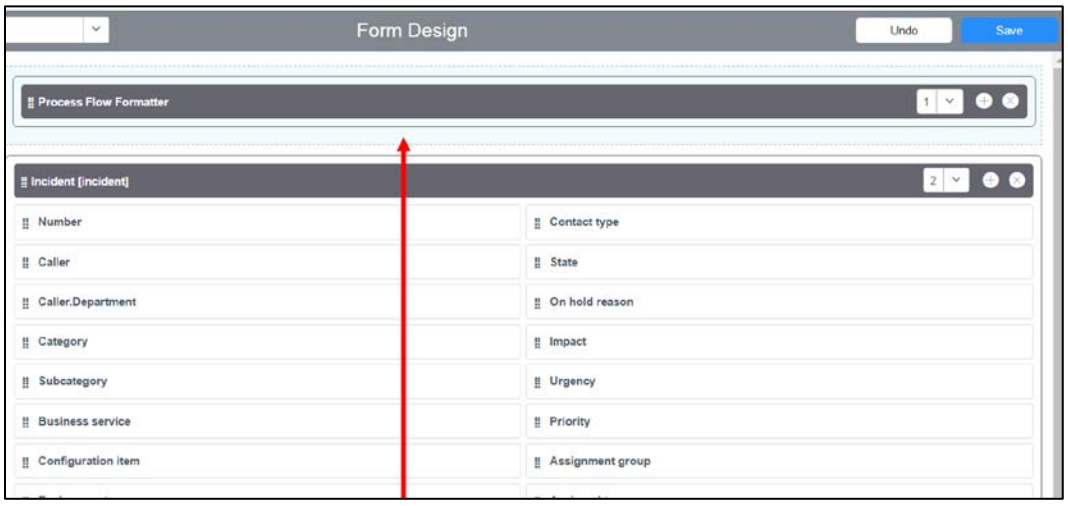
12. Set the name of the section to **Process Flow Formatter**.

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13. Select **1** as the layout.

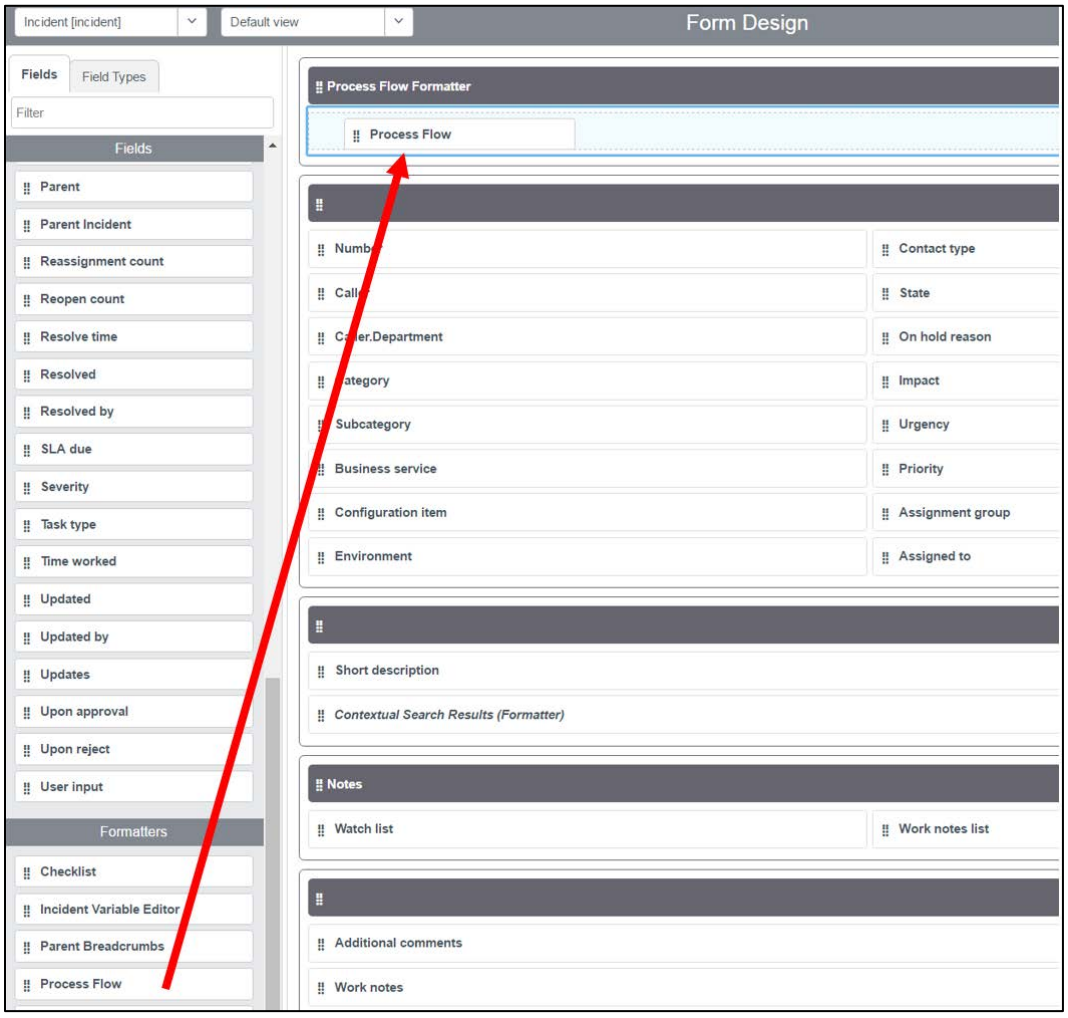


14. **Drag and drop** the new section on the top.



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15. Drag and drop the **Process Flow** Formatter to the newly created section.



16. Click **Save.**

17. After the progress completes, close the **Form Design** tab in the browser and return to the Incident form.

18. Click the ☰ icon at the top of the incident form and select **Reload Form**.

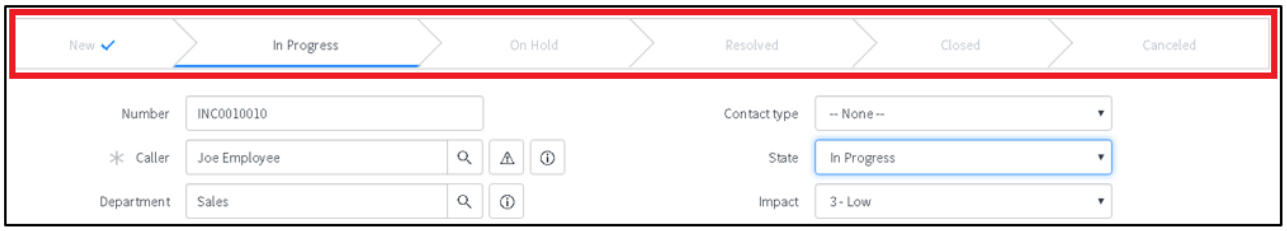
Lab Success Verification

1. Change the incident State to **In Progress.**

2. Click **Save.**

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3. The Process Flow Formatter represents the state of the incident.



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