knowledge14®

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Lab Guide

Incident 101:

From Creation to Resolution

Michael Ritchie & Chris McGrath

Lab instance: https://**<<name>>**.lab.service-now.com

Login / Passwords:

admin / Knowledge14

itil / Knowledge14

employee / Knowledge14

Lab Goal

This lab explains how to create an Incident using the Self-Service Portal.

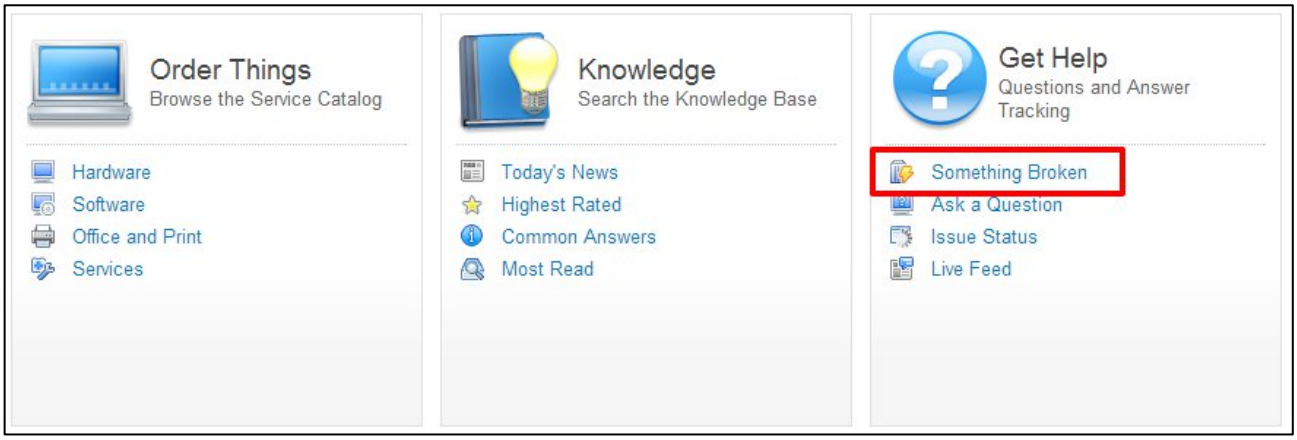
Lab 1
Create Incident Using Self-Service Portal

Create an Incident from the Self-Service Portal

1. Navigate to the **Self-Service portal** in your training instance by appending "**/ess**" to the URL: https://<<name>>.lab.service-now.com**/ess**

2. Login using the **employee** credentials provided on the cover.

3. Click on **Something is Broken**.



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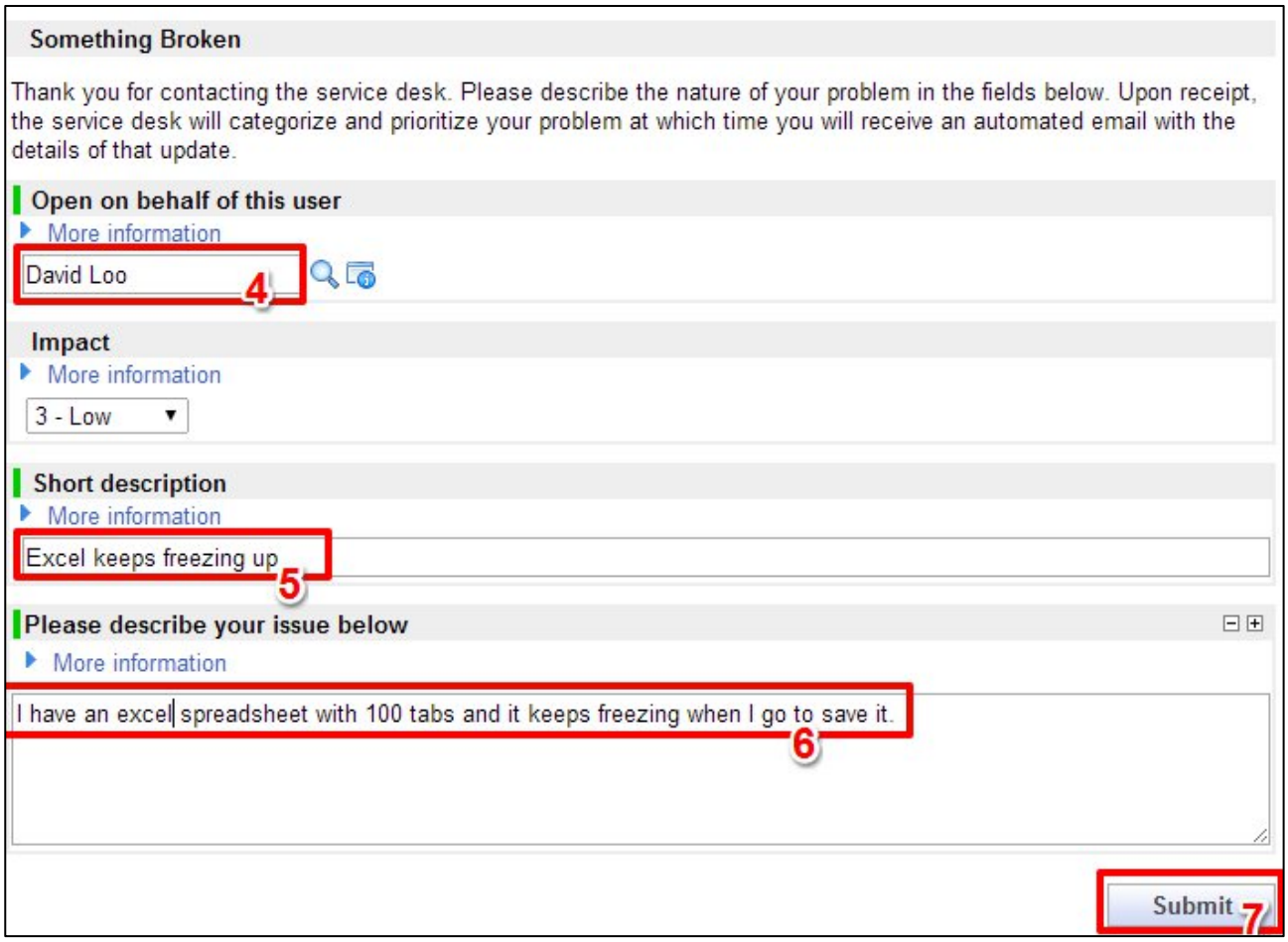
Note: The **Open on behalf of this user** field defaults to the logged in user, but you can change this to a different user.

4. Set **Open on behalf of this user**: **David Loo**

5. Type the following text into the **Short description** field: **Excel keeps freezing up**

6. Type the following text into the **Please describe your issue** field:
   I have an excel spreadsheet with 100 tabs and it keeps freezing when I go to save it.

7. Click **Submit**.



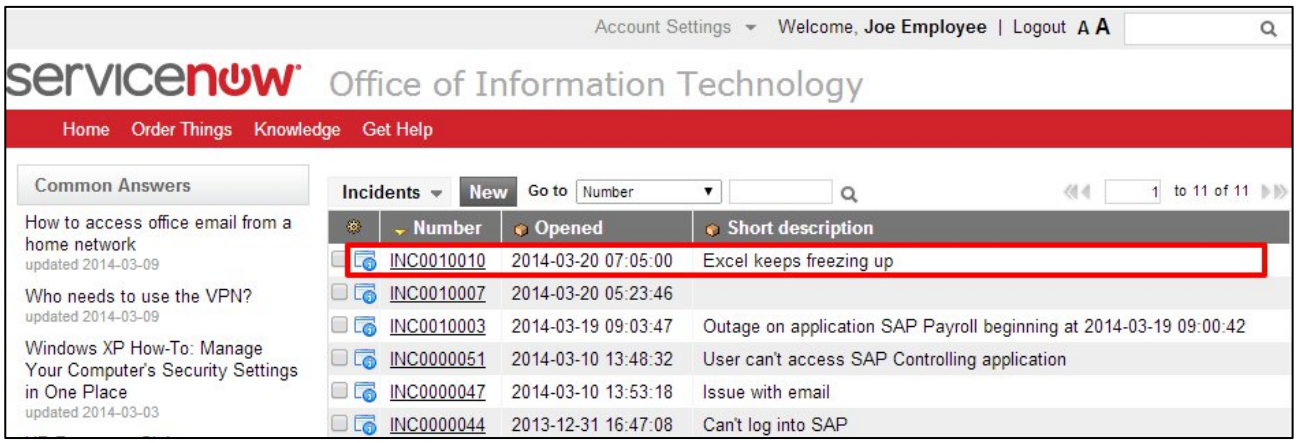
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Lab Success Verification

1. The screen should look like the example.

> **Thank you for your submission. You can check the status of open issues and questions at any time by clicking Current Status in the Get Help section of the menu or homepage.**

2. Click **Get Help** on the top menu bar then click **Status.** Verify the incident has been created.



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Lab Goal

This lab explains how to create an Incident using the Service Catalog.

Lab 2 Create Incident Using Service Catalog

Create an Incident from the Service Catalog

1. Navigate to your training instance:
   https://<<name>>.lab.service-now.com

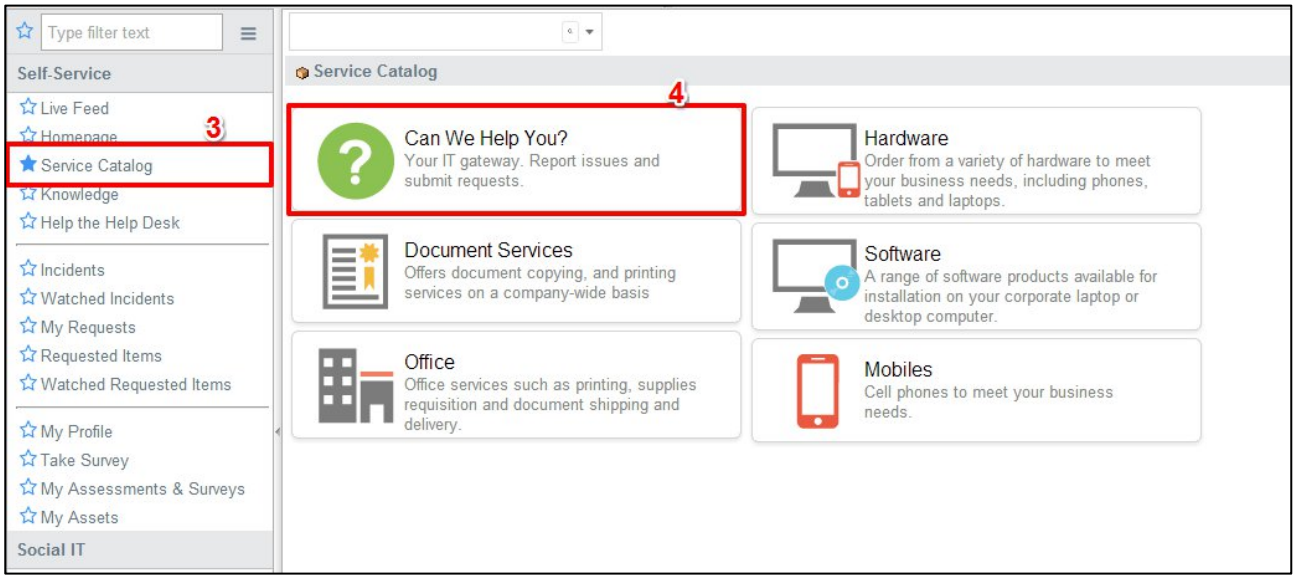
2. Login using the **employee** credentials provided on the cover.

3. On the **left navigation pane**, under **Self-Service**, click **Service Catalog**.

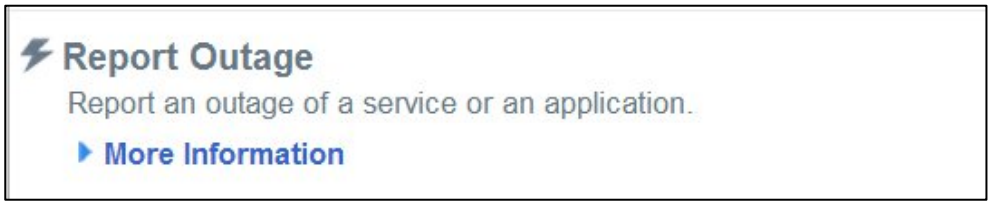
NOTE: In subsequent labs, these steps are abbreviated to **Application Name** > **Module Name.**

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4. In the **Service Catalog** window, click **Can We Help You.**



5. Scroll to the bottom of the page and select **Report an Outage**.



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6. Select **SAP Payroll** as the **application** that **is down/unavailable.**

NOTE: This field supports **type-ahead**, which is not case-sensitive.

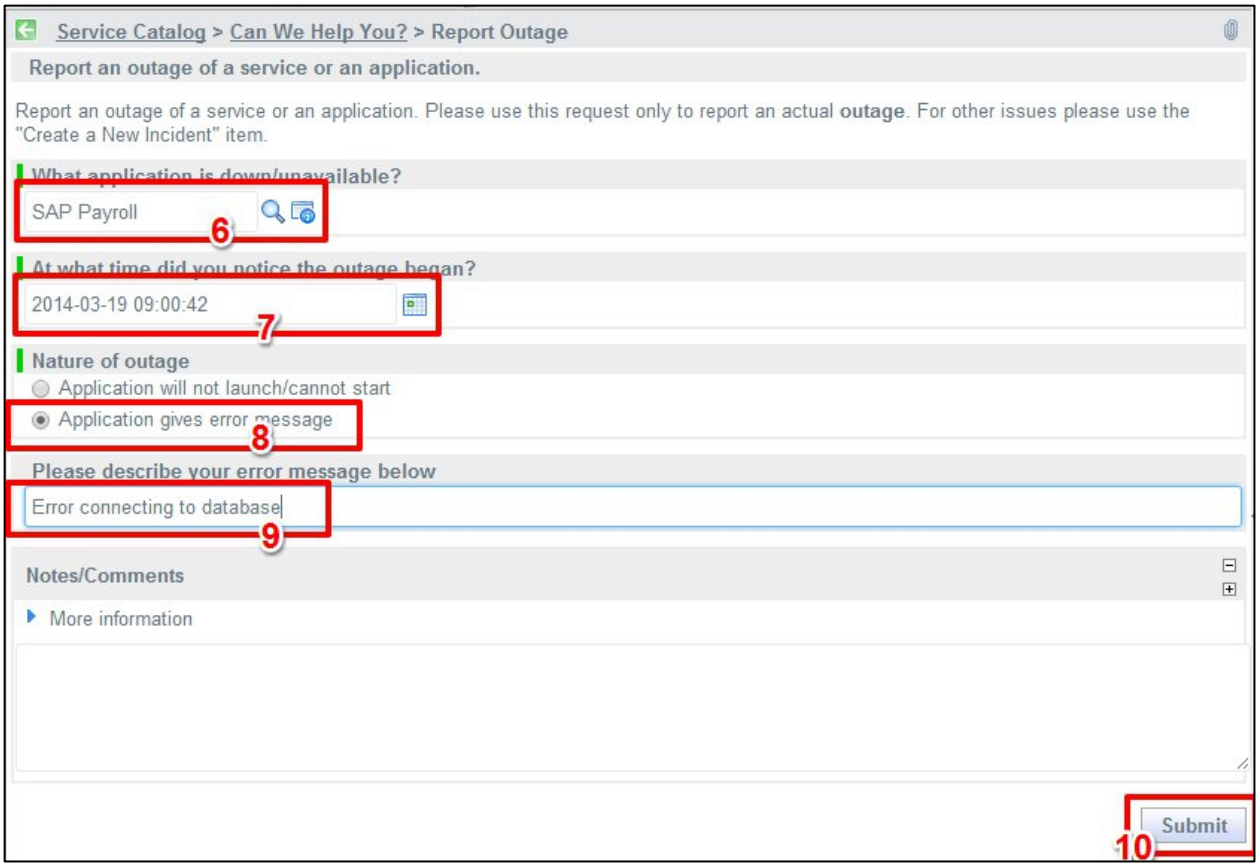
7. Click the calendar icon  to select a time and date when the outage began.

8. Click the radio button next to **Application gives error message.**

NOTE: This form is dynamic and will display an extra field, based on your selection.

9. Type the following text into the **Please describe your error message** field:
   Error connecting to database

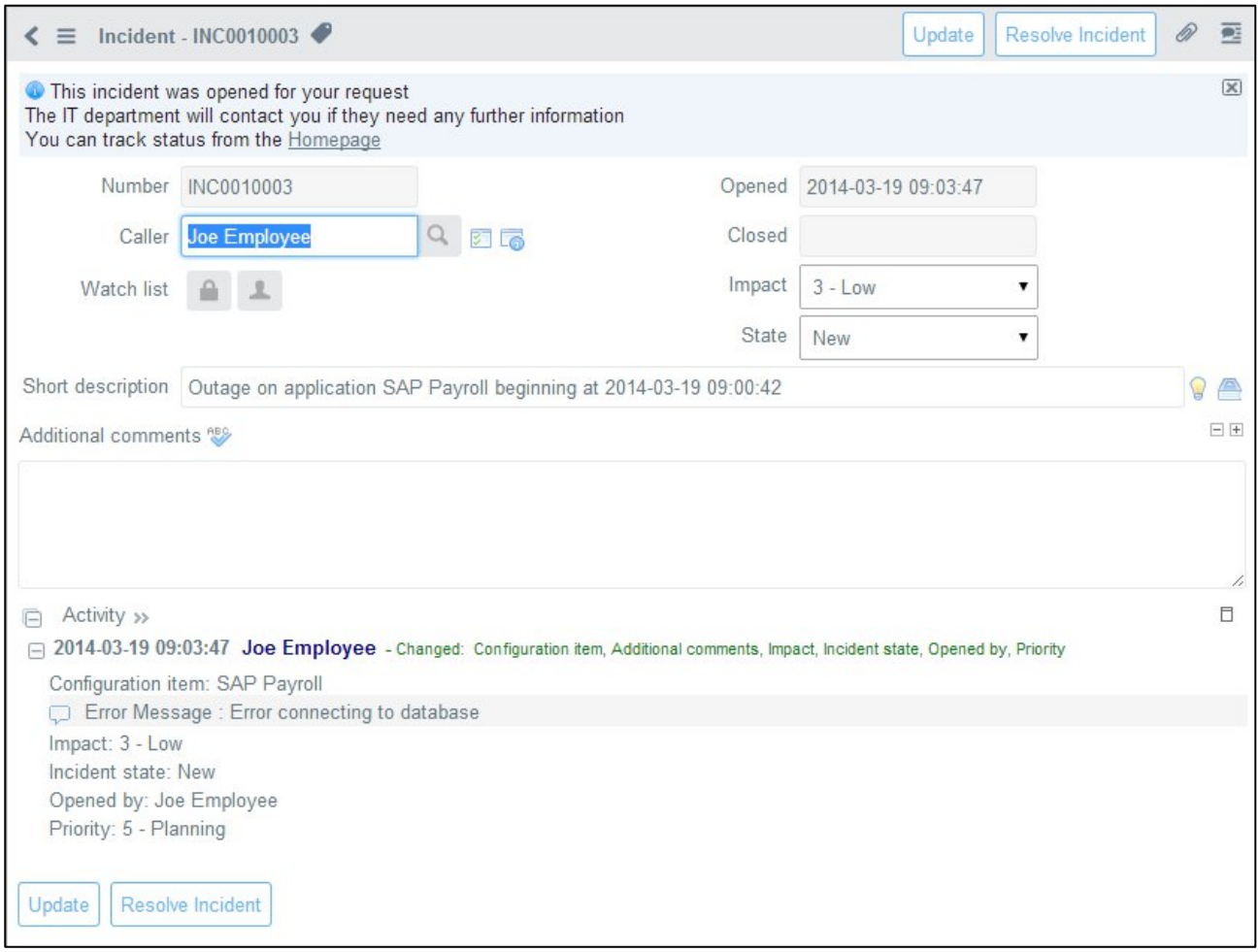
10. Click **Submit**



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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 an Incident as an ITIL user using the New Call form. The lab also explains how to install the Service Desk Call plugin.

Lab 3 Create Incident Using New Call Form

Install the Service Desk Call Plugin

The **New Call** wizard is an application that is not enabled by default in a new customer instance. This is done via the **Service Desk Call** plugin. Follow the steps below to install the plugin.

1. Navigate to your training instance:
   https://<<name>>.lab.service-now.com

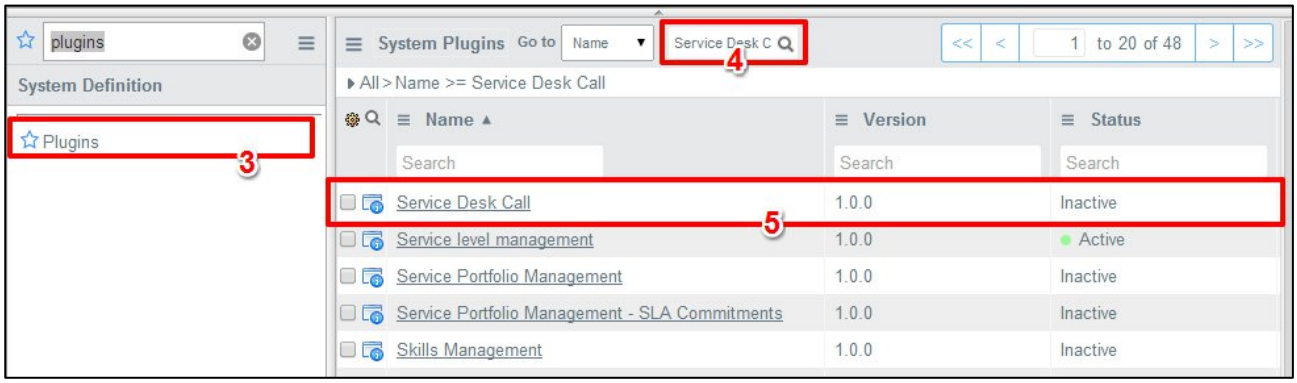
2. Login using the **admin** credentials provided on the cover.

3. Navigate to **System Definition > Plugins**.

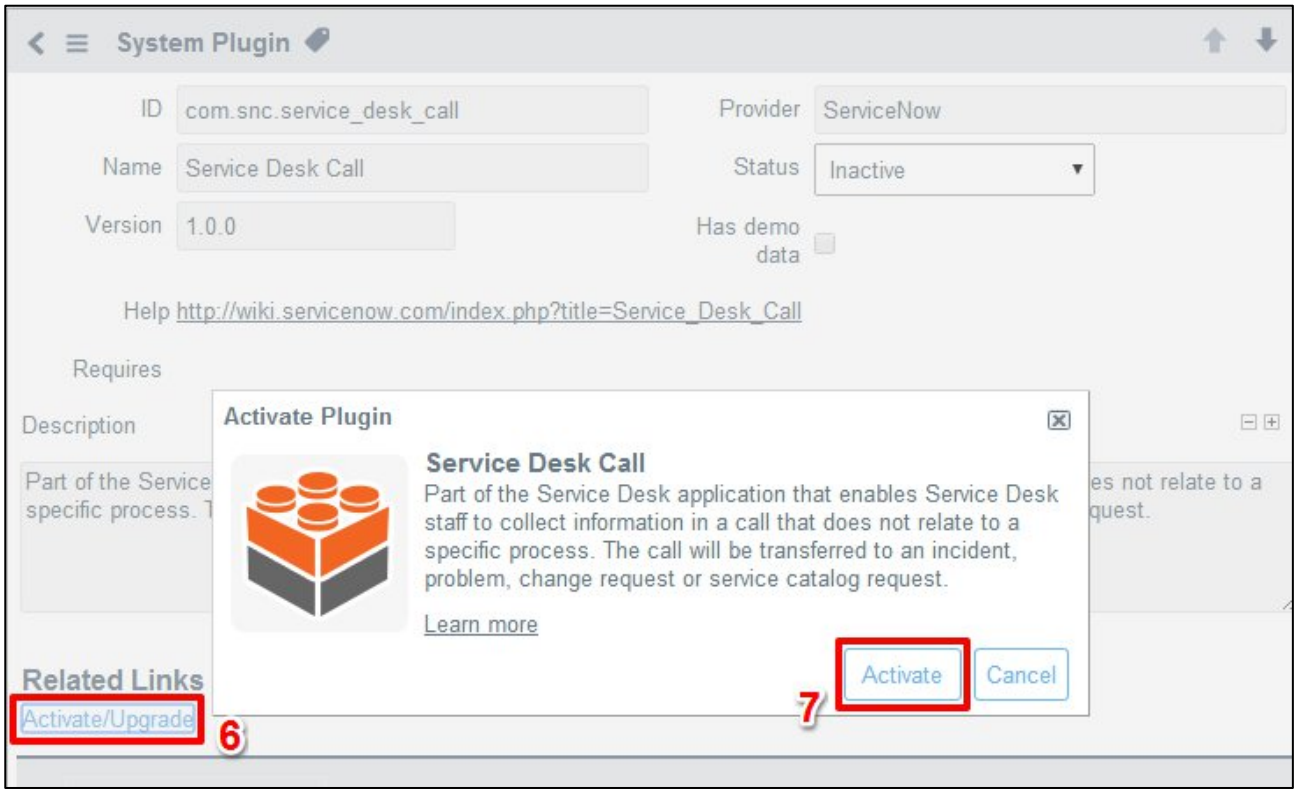
4. Search for **Service Desk Call**.

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5. Select the **Service Desk Call** plugin.



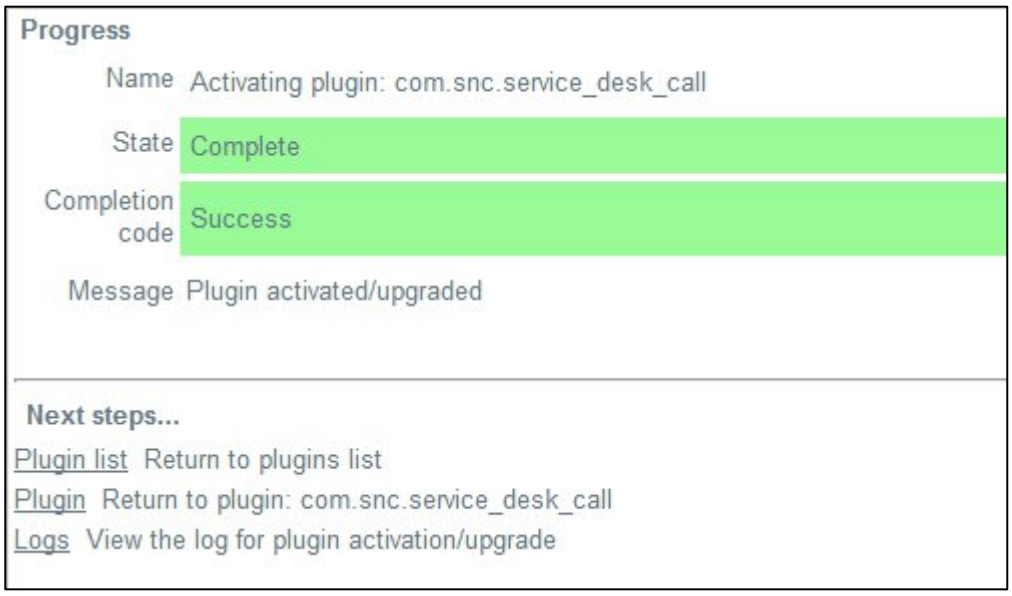
6. Below **Related Links** at the bottom of the screen, click **Activate/Upgrade**.



7. A dialog box opens describing the plugin. Click **Activate** on the dialog window.

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8. The activation process can take a while to complete. After the plugin installation completes, the following message appears.



Create an Incident Using the New Call Form

1. Navigate to your training instance:
   https://<<name>>.lab.service-now.com

2. Login using the **itil** credentials provided on the cover.

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3. Navigate to **Service Desk > New Call**.

4. Set **Caller** to **Bud Richman.**

NOTE: When a **Caller** is selected, the **Company** field automatically populates.

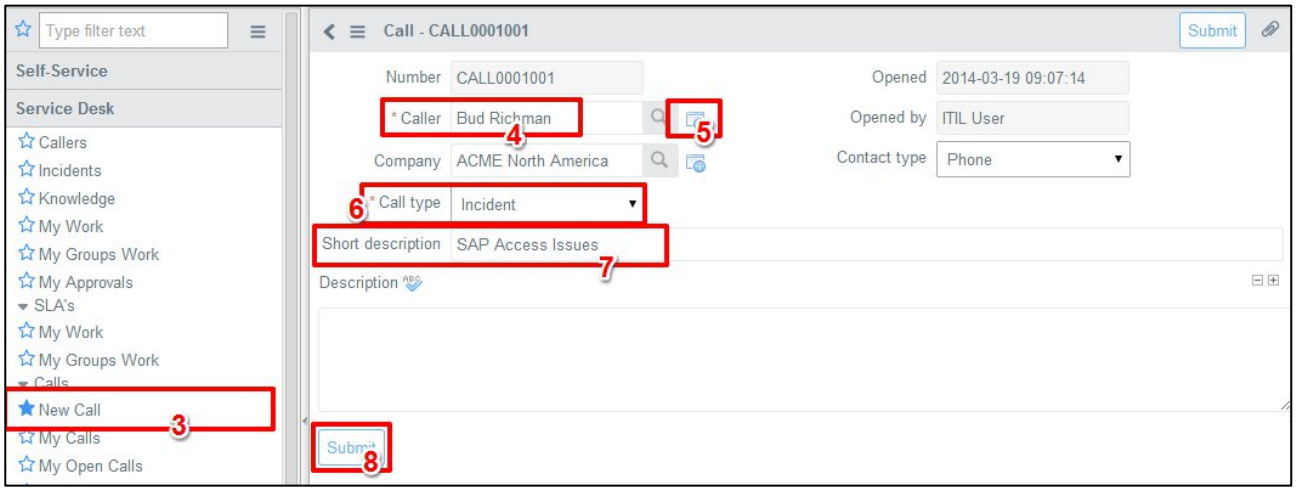
5. Hover over the Record  icon next to the **Caller** field.

NOTE: What is Bud Richman's Department?

6. Set **Call Type** to **Incident**.

7. Type the following text into the **Short description** field: **SAP Access issues**.

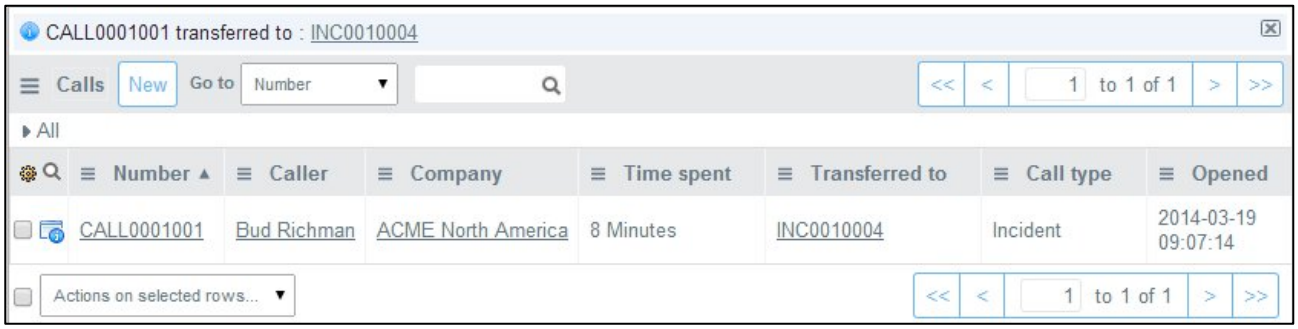
8. Click **Submit**.



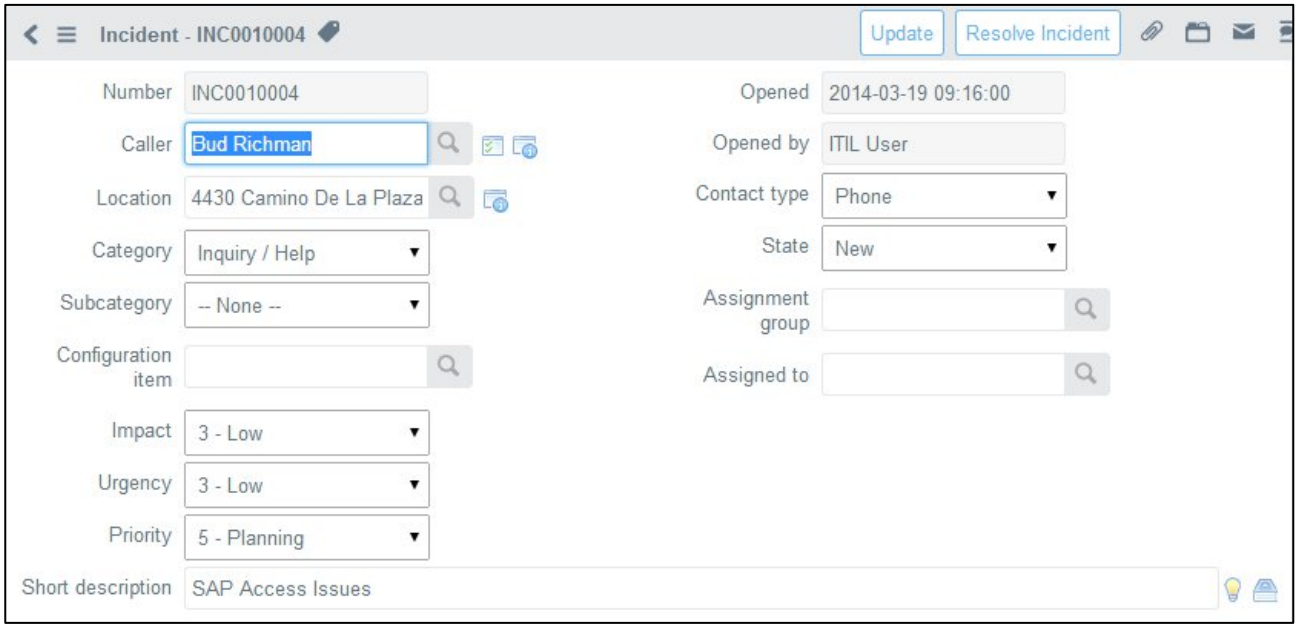
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Lab Success Verification

1. The screen should look like the example.



2. Click on the **Incident** number to view the new Incident:



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Lab Goal

This lab explains how to create an Incident as an ITIL user using the Incident module.

Lab 4 Create Incident Using Incident Module

Create an Incident Using the Incident Module

1. Navigate to your training instance:
   https://<<name>>.lab.service-now.com

2. Login using the **itil** credentials provided on the cover.

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

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4. Set **Caller** to **Bow Ruggeri**.

NOTE: When **Caller** is selected, the **Location** field automatically populates.

5. Set **Category** to **Database**.

6. Set **Configuration Item** to **SAP ORA01**.

7. Hover over the Record icon  next to the **Configuration Item** field to display information about the Configuration Item.

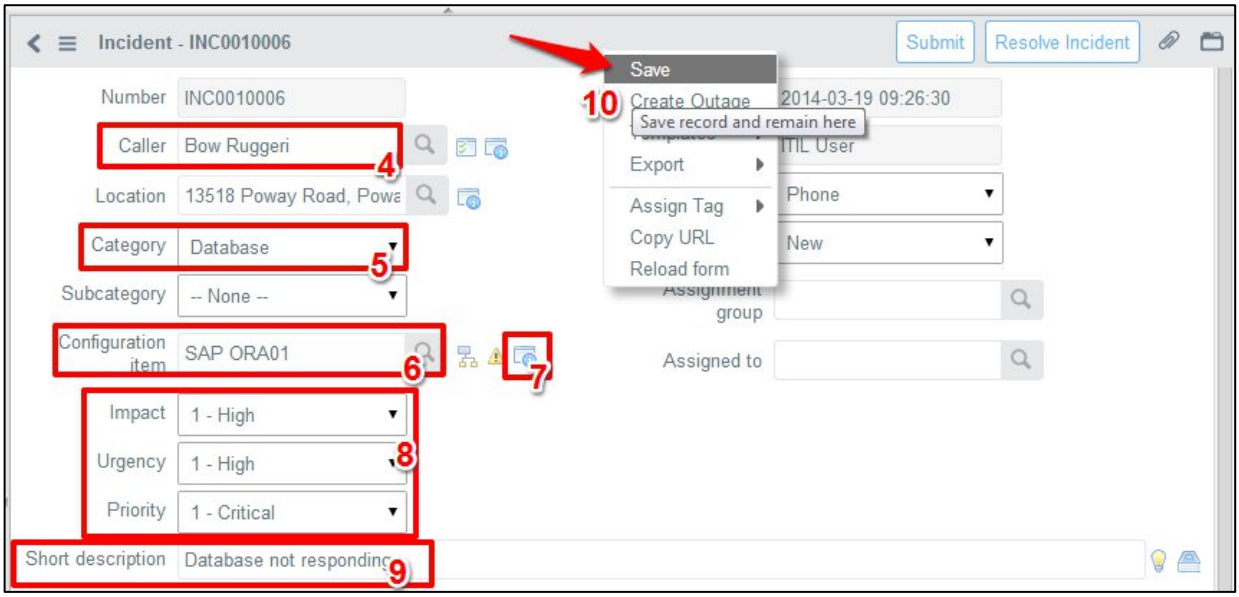
NOTE: What is the support group for this **Database**? What is the **Approval Group**?

8. Change **Impact** to **1 – High** and **Urgency** to **1 – High**.

NOTE: The Priority is automatically calculated based on Impact and Urgency.

9. Type the following text into the **Short Description** field: **Database not responding.**

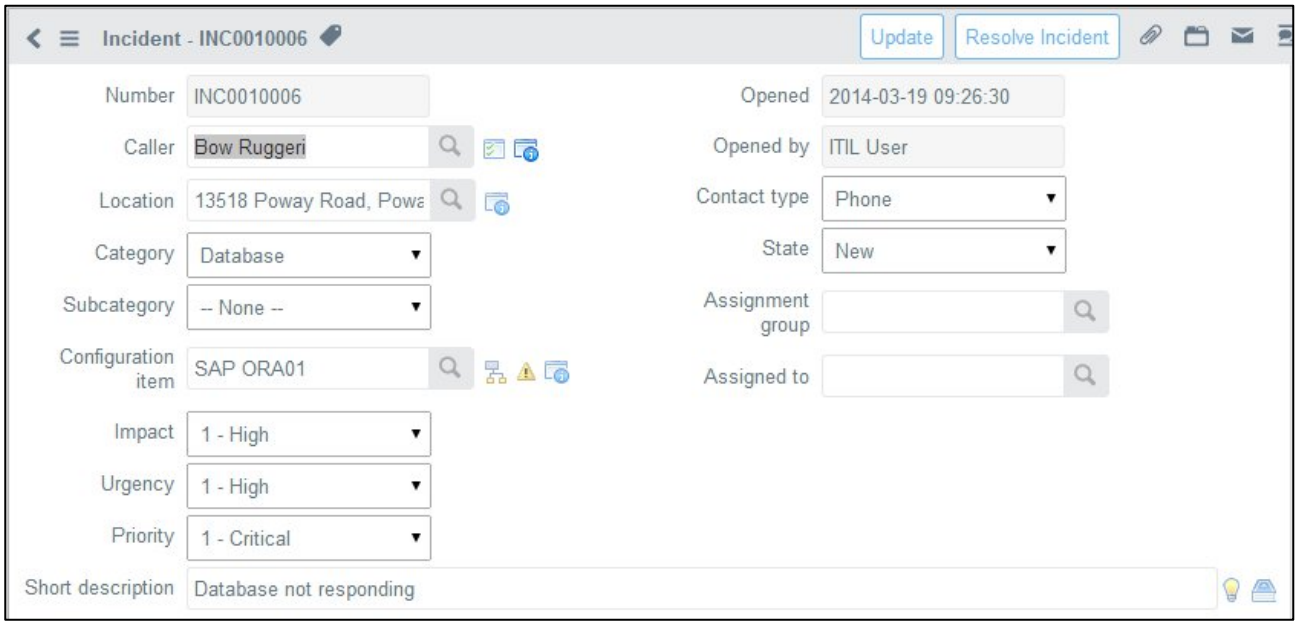
10. Right-click the **form header** and click **Save**.



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Lab Success Verification

1. The screen should look like the example.



Challenge: List 3 Other Ways to Create an Incident.

1.

2.

3.

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Lab Goal

This lab explains how ITIL users categorize and assign an incident using the Incident module.

Lab 5 Categorize & Assign Using Incident Module

Categorize and Assign an Incident

1. Navigate to your training instance:
   https://<<name>>.lab.service-now.com

2. Login using the **itil** credentials provided on the cover.

3. Navigate to **Incident > Open** then select the **Incident** for caller **Joe Employee.**

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4. Change **Category** to **Hardware.**

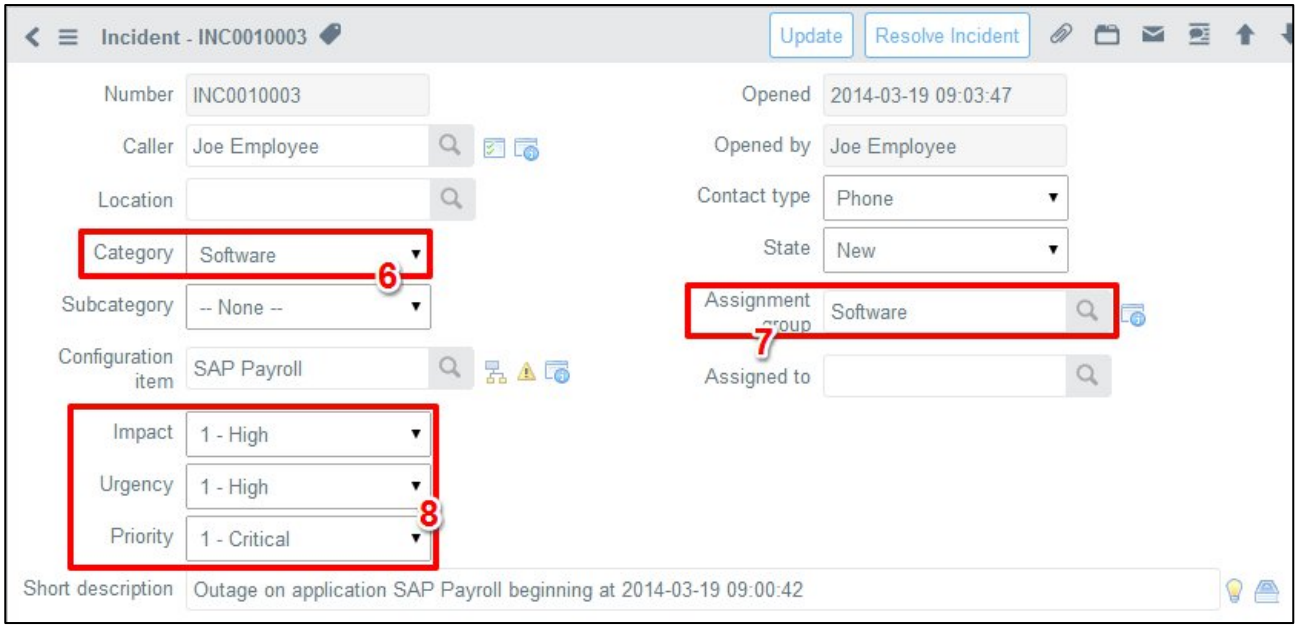
5. Change **Subcategory** to **CPU.**

6. Change **Category** to **Software.**

NOTE: Selecting **Software** as the **Category** changes the choices for **Subcategory**.
NOTE: What is the **Assignment Group** set to?

7. Change **Assignment Group** to **Software**.

8. Change **Impact** to **1 – High** and **Urgency** to **1 – High**.



NOTE: The **Priority** setting calculates automatically based on **Impact** and **Urgency** settings.

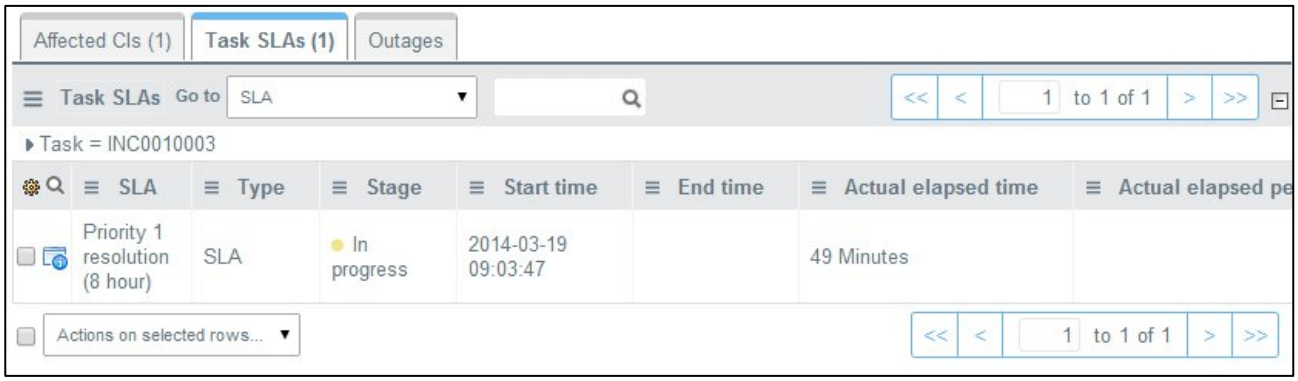
9. Right-click the **form header** and click **Save.**

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Lab Success Verification

1. Scroll to the bottom of the form and click the **Task SLAs** related list tab.

   The screen should look like the example.



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Lab Goal

This lab explains how ITIL users share information with appropriate people by using Comments and Work Notes.

Lab 6 Investigate & Diagnose Using Comments and Notes

Using Comments and Work Notes

1. Navigate to your training instance**:**
   https://<<name>>.lab.service-now.com

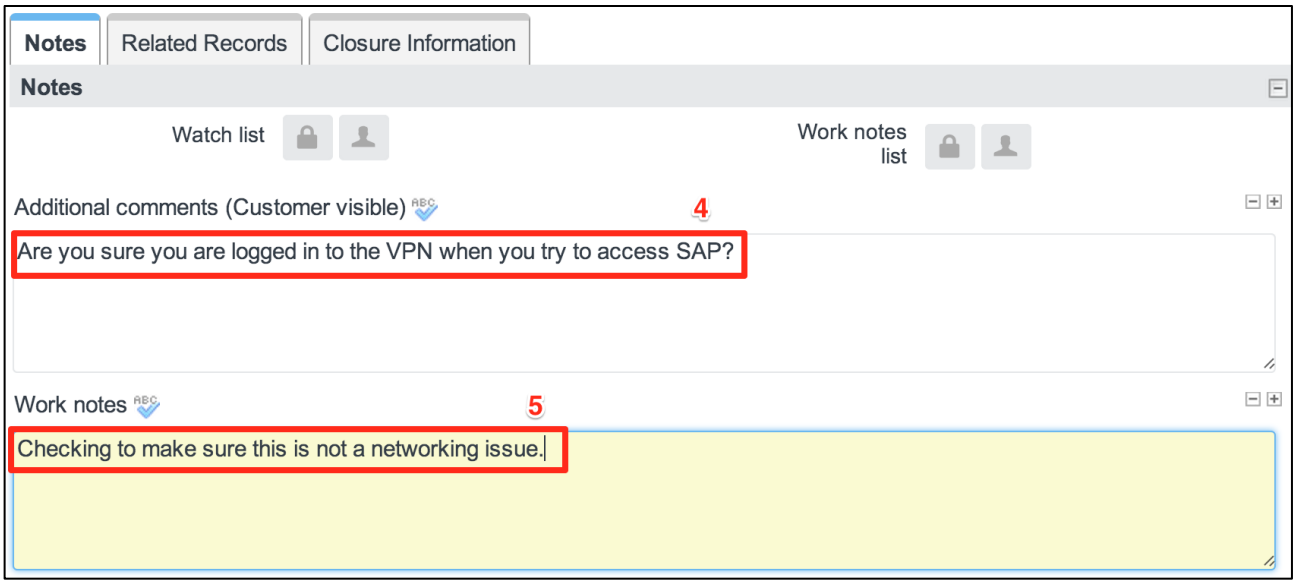
2. Login using the **itil** credentials provided on the cover.

3. Navigate to **Incident > Open** then select the **Incident** for caller **Joe Employee.**

4. Under the **Notes** section, type the following text into the **Additional Comments** field:
   Are you logged in to the VPN when you try to access SAP?

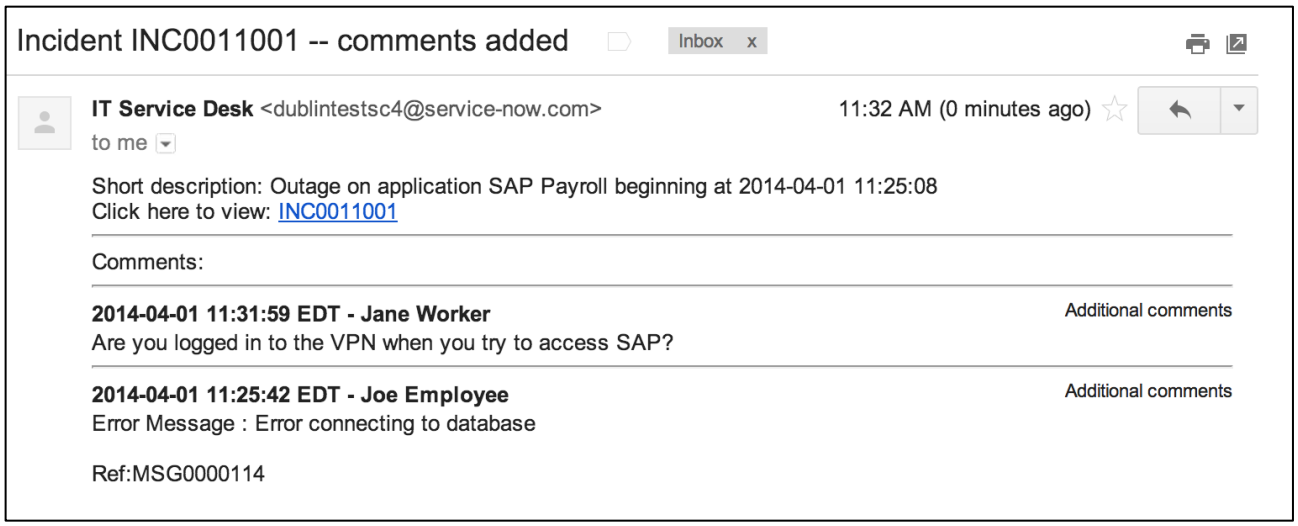
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5. Type the following text into the **Work Notes** field:
   Checking to make sure this is not a networking issue.



6. Right-click the **form header** and click **Save.**

NOTE: Clicking **Save** triggers a notification to the caller. The notification contains the comment and other relevant information. The caller can either reply to the email, or login to the instance to address the comment.

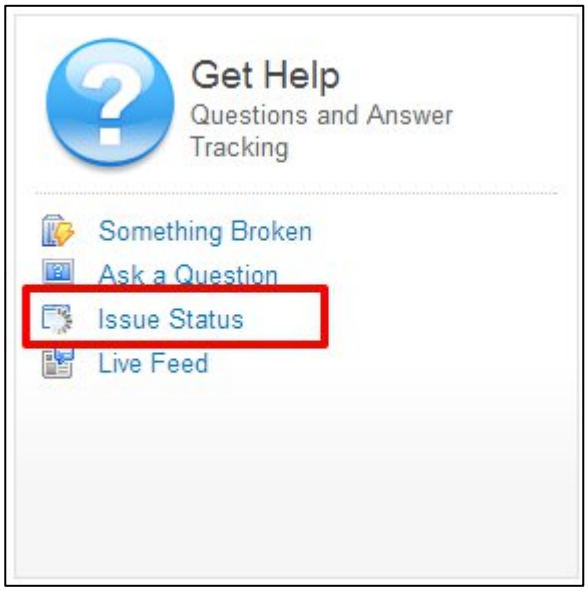


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7. Using a different browser, navigate to the **Self-Service** portal in your training instance: **https://<<name>>.lab.service-now.com/ess**

8. Login using the **employee** credentials provided on the cover.

9. Click **Issue Status** under the **Get Help** section.



10. Select the **Incident** created for the caller **Joe Employee.**

11. Under the **Activity** tab, notice how **Comments** from Jane Worker are visible, but **Work Notes** are not. The **Work Notes** field is not customer-visible.

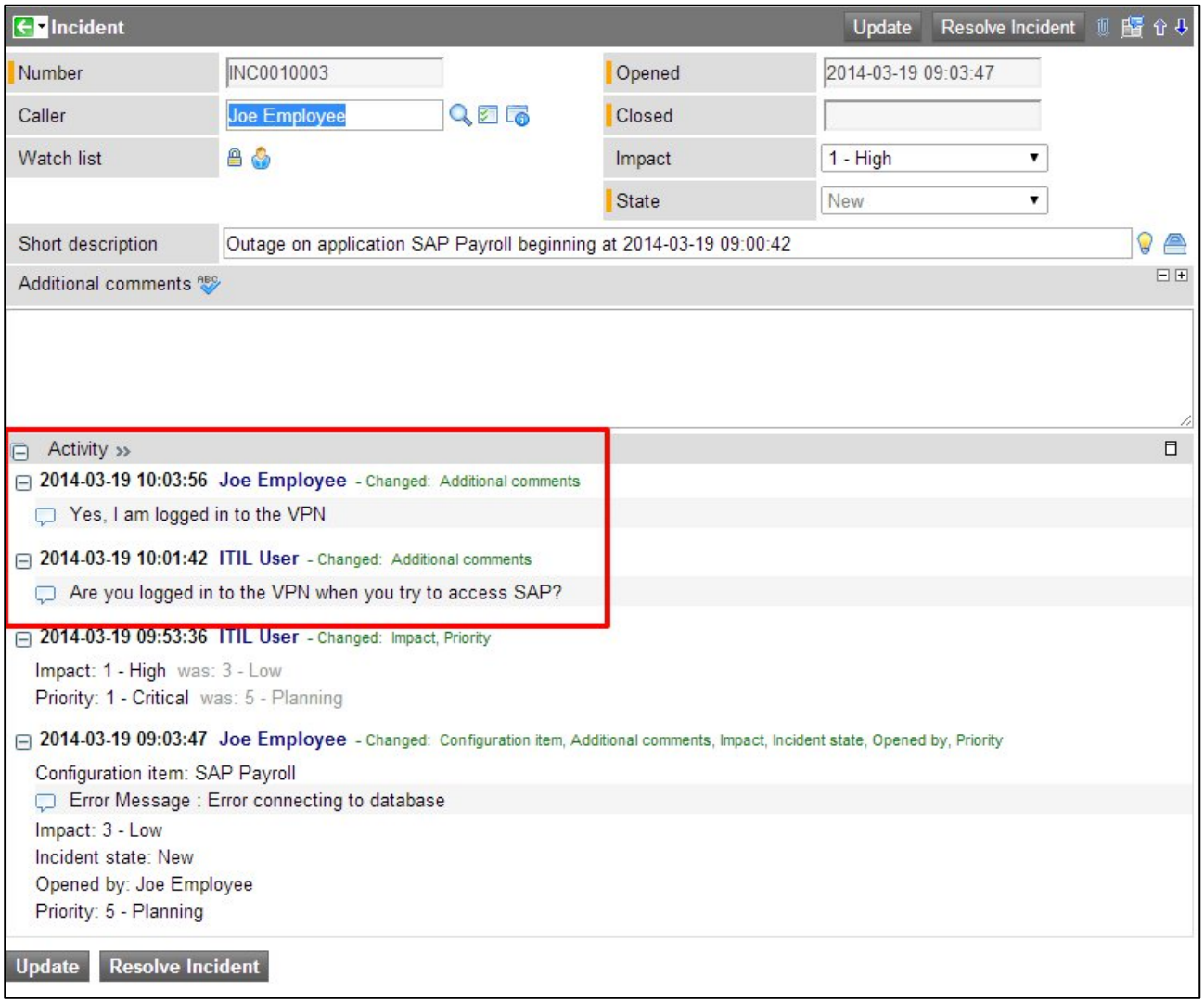
12. Type the following text into the **Additional Comments** field:
Yes, I am logged in to the VPN.

13. Right-click the **form header** and click **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 ITIL users investigate and diagnose Incidents by attaching a Knowledge Article to an Incident.

Lab 7
Investigate & Diagnose Using Knowledge Article

Use Knowledge to Help Resolve an Incident

1. Navigate to your training instance:
   https://<<name>>.lab.service-now.com

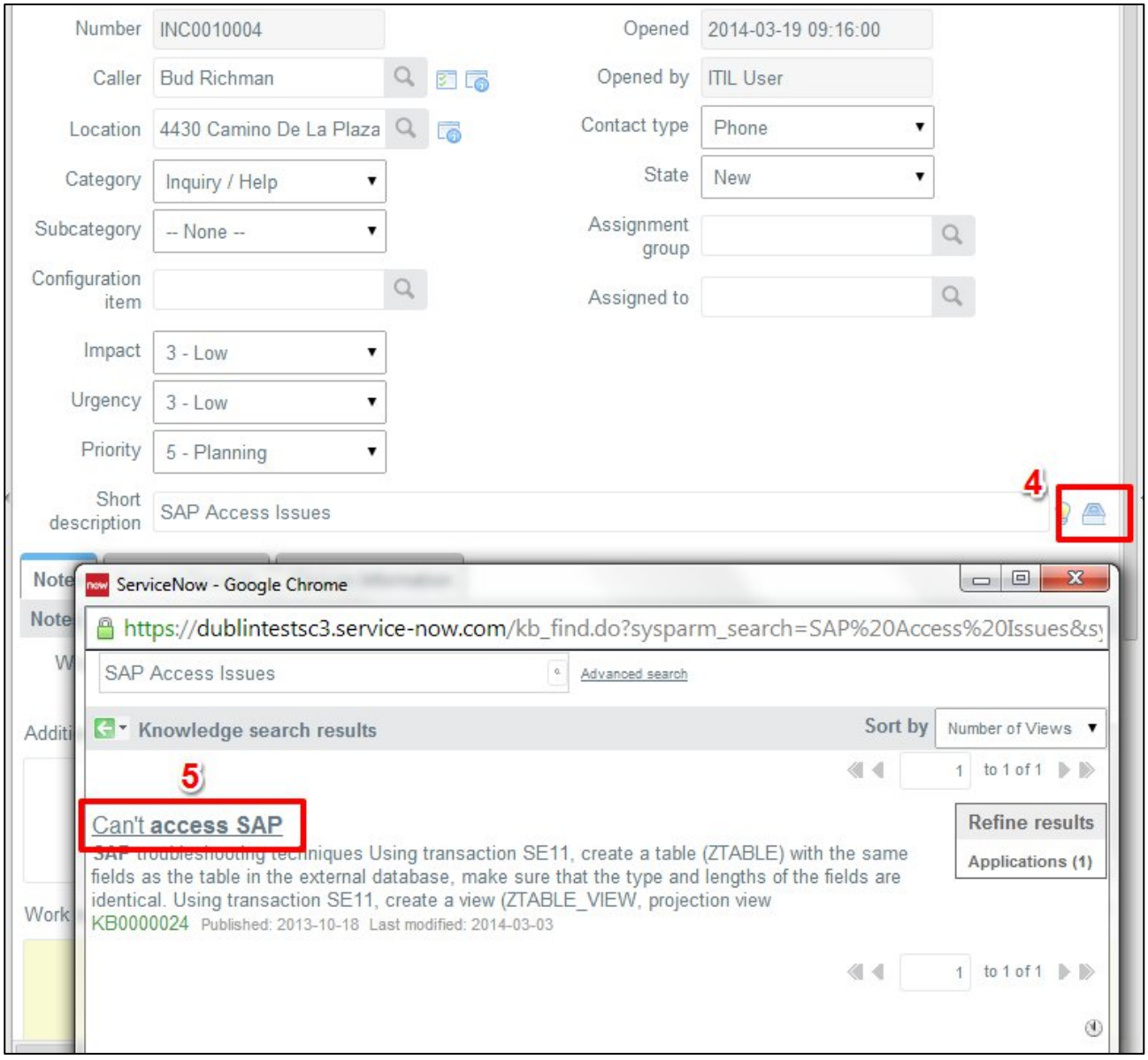
2. Login using the **itil** credentials provided on the cover.

3. Navigate to **Incident > Open** then select the **Incident** link for caller is **Bud Richman.**

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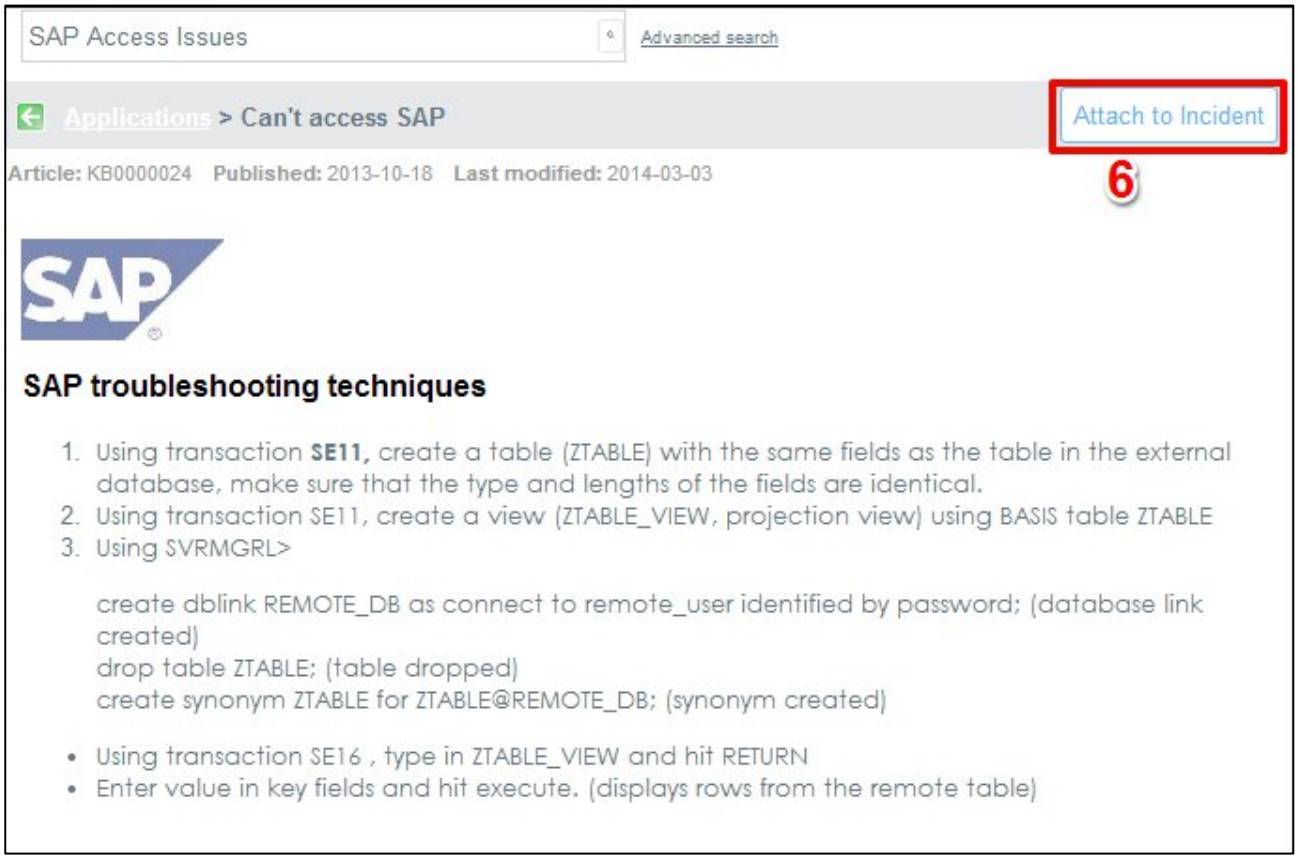
4. Click the **Search Knowledge** icon.

5. In the **Knowledge** search **Results** list, click the article **Can't access SAP**.



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6. Click the **Attach to Incident** button.



NOTE: the article is placed into the Comments field of the Incident in raw HTML format

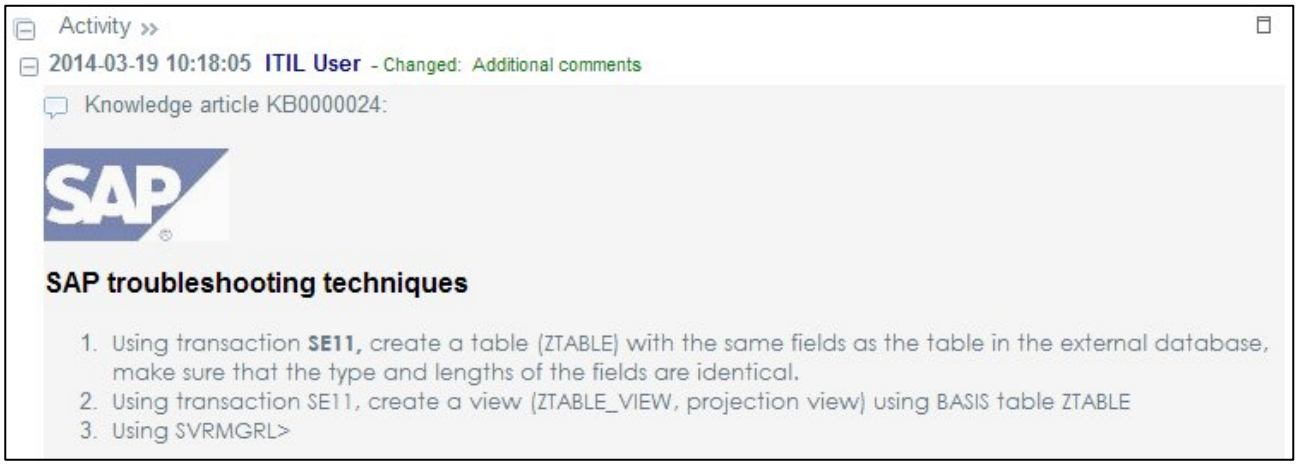
7. Right-click on the **form header** and click **Save**.

NOTE: the article now displays in the Activity log in web display.

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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 ITIL users use the BSM Map in the Self-Service portal to select a Configuration Item.

Lab 8
Investigate & Diagnose Using the BSM Map

Troubleshoot the Incident Using the BSM Map

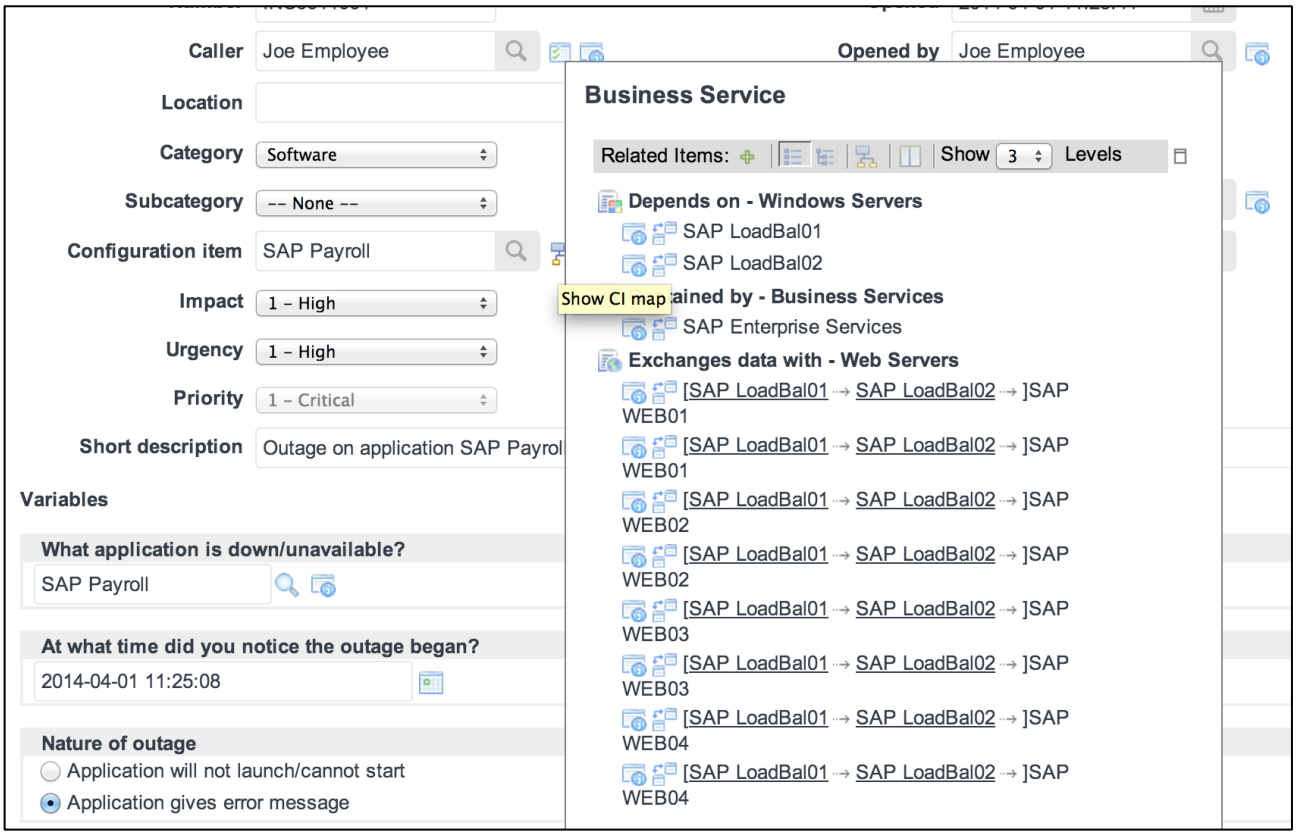
1. Navigate to the Self-Service portal in training instance: **https://<<name>>.lab.service-now.com/ess**

2. Login using the **itil** credentials provided on the cover.

3. Navigate to **Incident > Open** then select the **Incident** link for caller **Joe Employee**.

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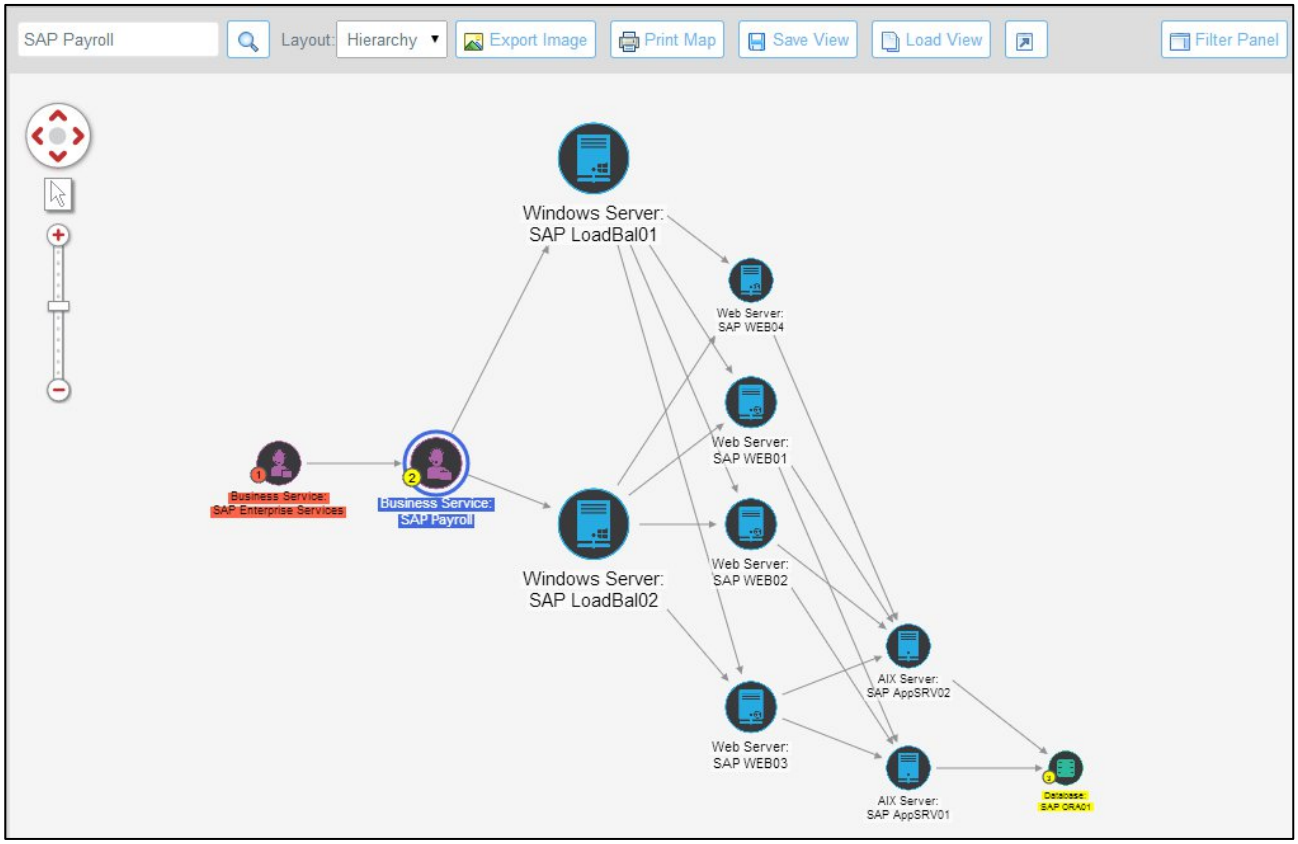
4. Hover the mouse over the **CI Map** icon next to the **Configuration Item** field.



NOTE: Here you can see a list of the relationships for that CI.

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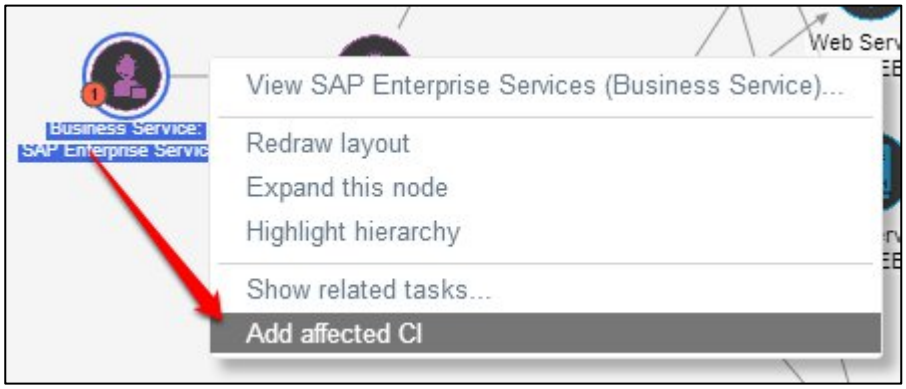
5. Click the **CI Map** icon to see a visualization of the relationships.



NOTE: What other Business Services are dependent upon SAP Payroll?

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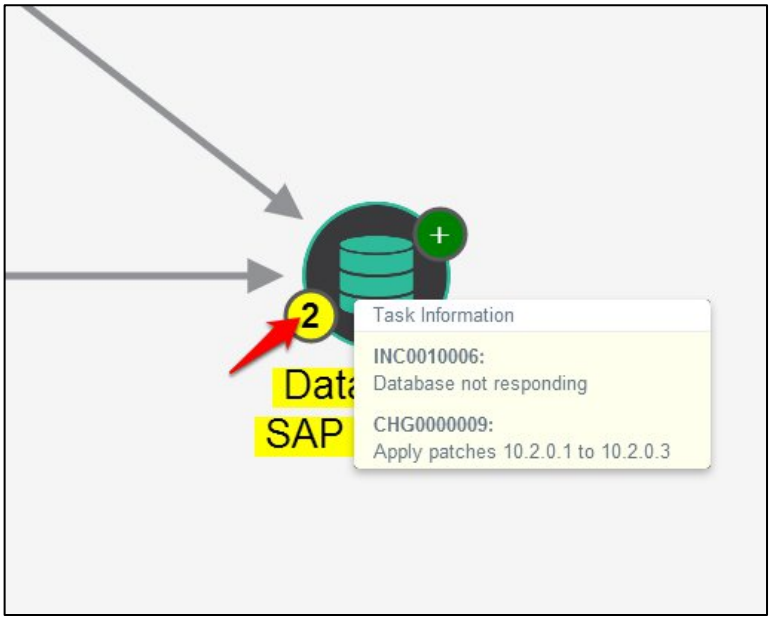
6. Right-click on **SAP Enterprise Services** and select **Add Affected CI.**



NOTE: The following message appears at the top of the screen:



7. Hover over the yellow **2** icon on the **SAP ORA1** Database on the right side of the screen to view **Task Information** related to this item.



NOTE: What other Tasks are associated with this CI?

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8. Close the **BSM** window and return to the **Incident Record**.

9. Right-click the **form header** and select **Reload Form.**

10. Scroll to the bottom of the form and select the **Affected CIs** tab.

Lab Success Verification

1. The screen should look like the example.



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Lab Goal

This lab explains how ITIL users create a Change Request from an Incident and see how the Records are automatically related.

Lab 9 Related Records: Change Request

Create a Change Request

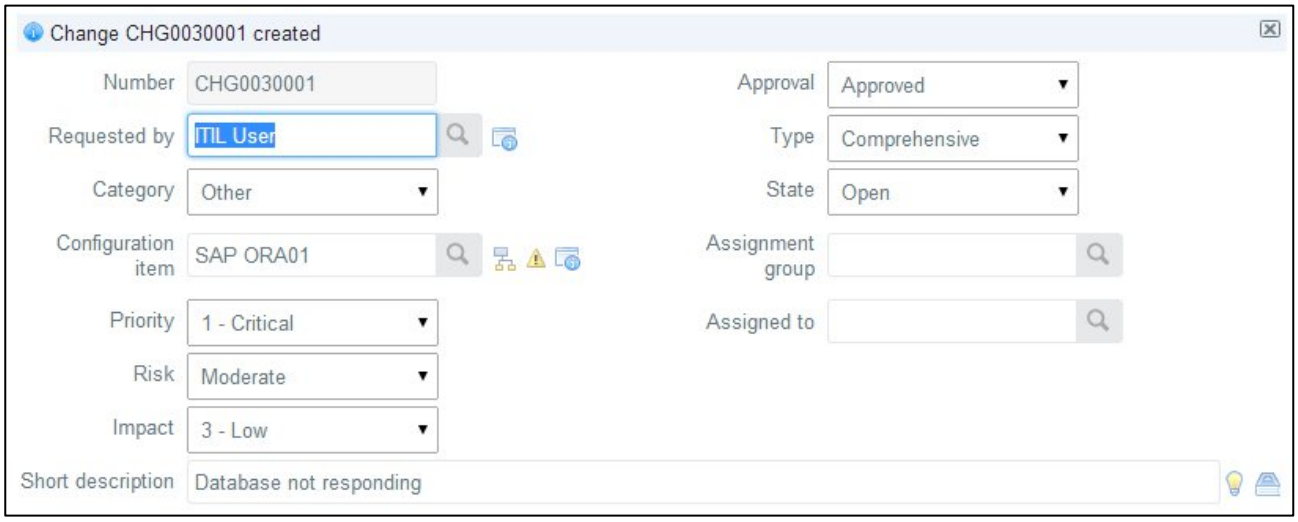
1. Navigate to your training instance:
   https://<<name>>.lab.service-now.com

2. Login using the **itil** credentials provided on the cover.

3. Navigate to **Incident > Open** then select the incident for caller **Bow Ruggeri**.

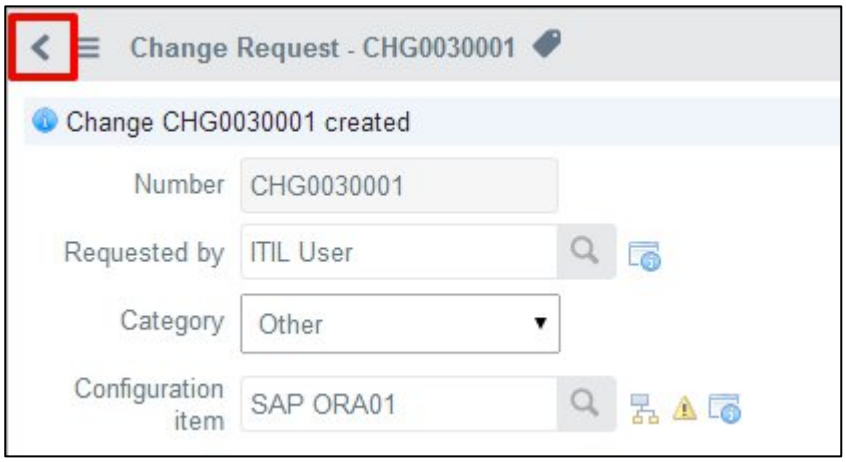
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4. Right-click the **form header** and select **Create Change.**



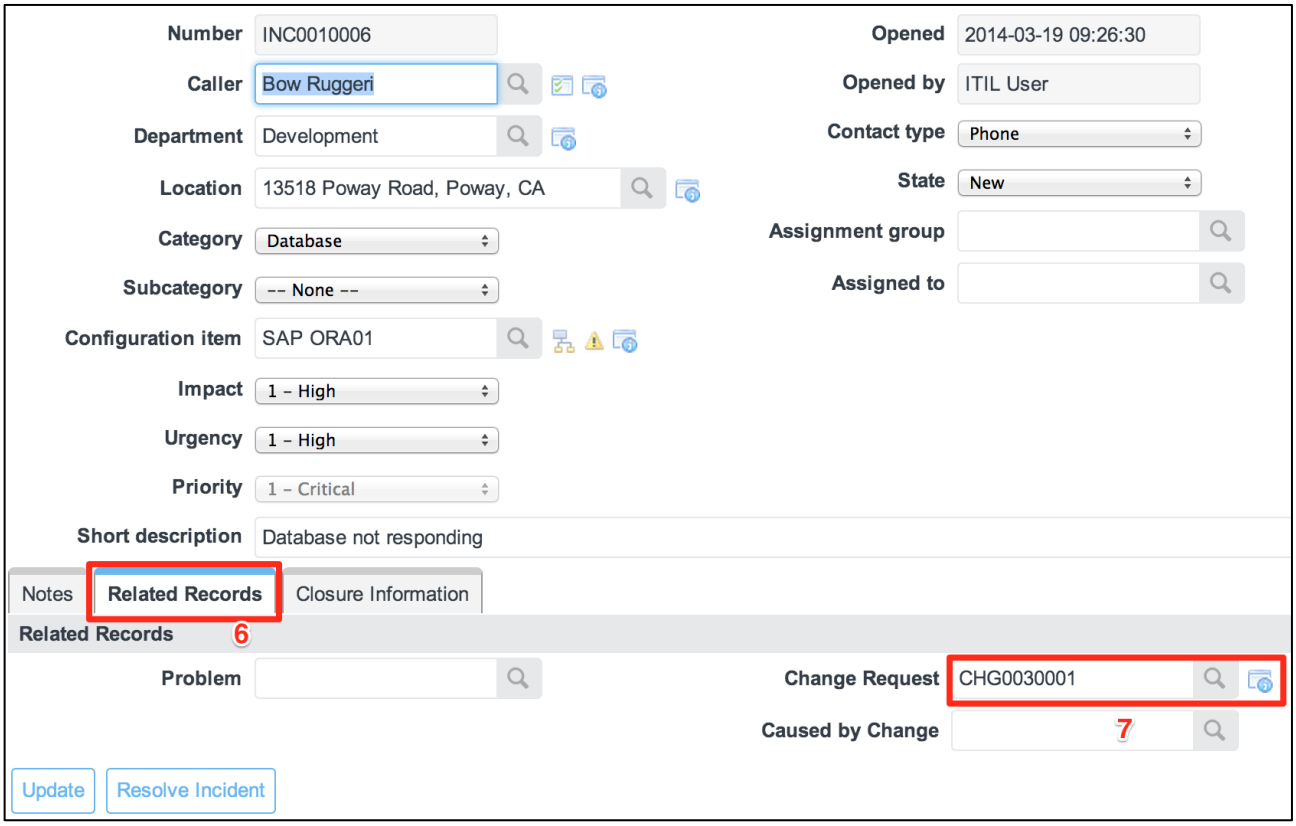
NOTE: Information from the **Incident Record** is automatically populated on the **Change Record**.

5. Click the Back button on the top-left corner of the form to return to the **Incident** form.



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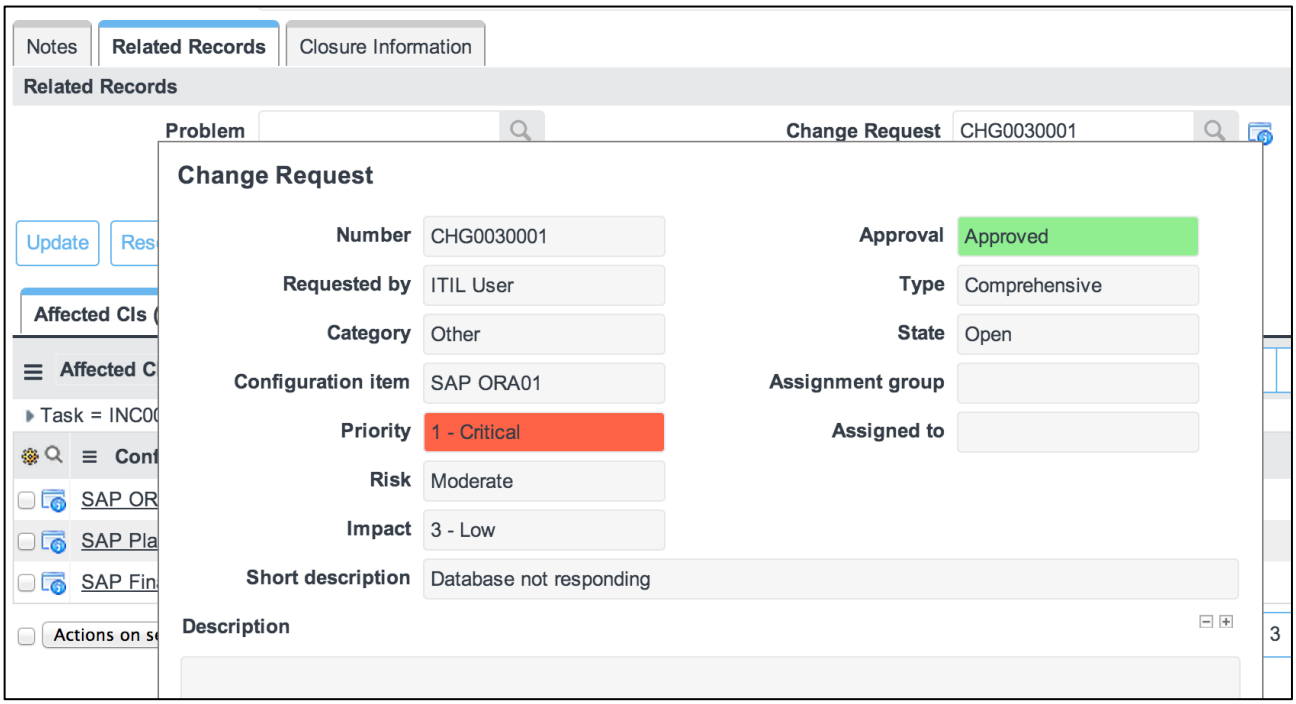
6. On the **Incident** form, click the **Related Records** tab.



NOTE: The **Change Request** number populates the **Change Request** field.

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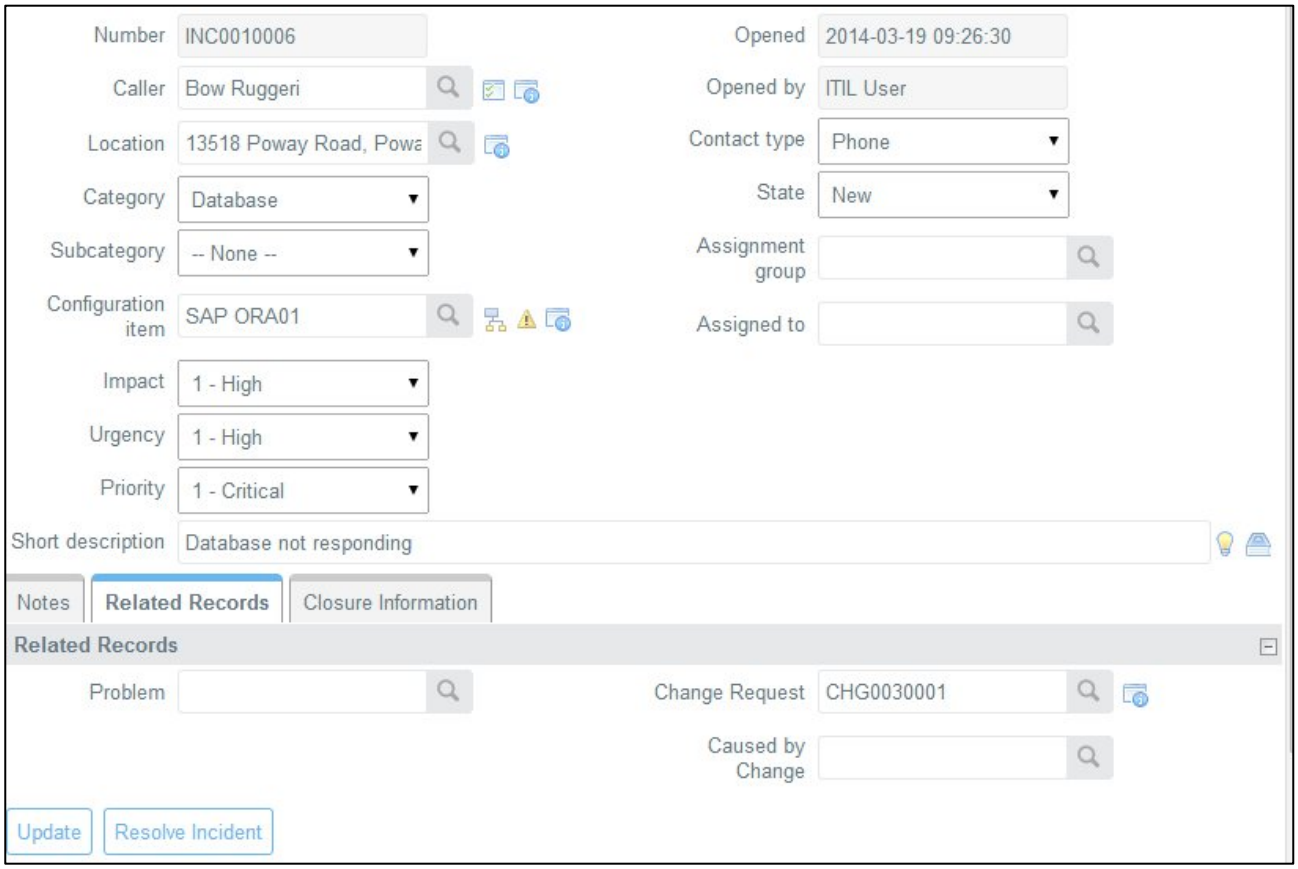
7. Hover over the Record icon  next to the **Change Request** field to display information about the **Change Request**.



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Lab Success Verification

1. The screen should look like the example.



Challenge 1: Create a Problem Record from an Incident Record.

Challenge 2: List 3 other records that can be created from an Incident.

1.

2.

3.

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Lab Goal

This lab explains how to resolve an Incident.

Lab 10
Resolve Incident

Resolve an Incident

1. Navigate to your training instance:
   https://<<name>>.lab.service-now.com

2. Login using the **itil** credentials provided on the cover.

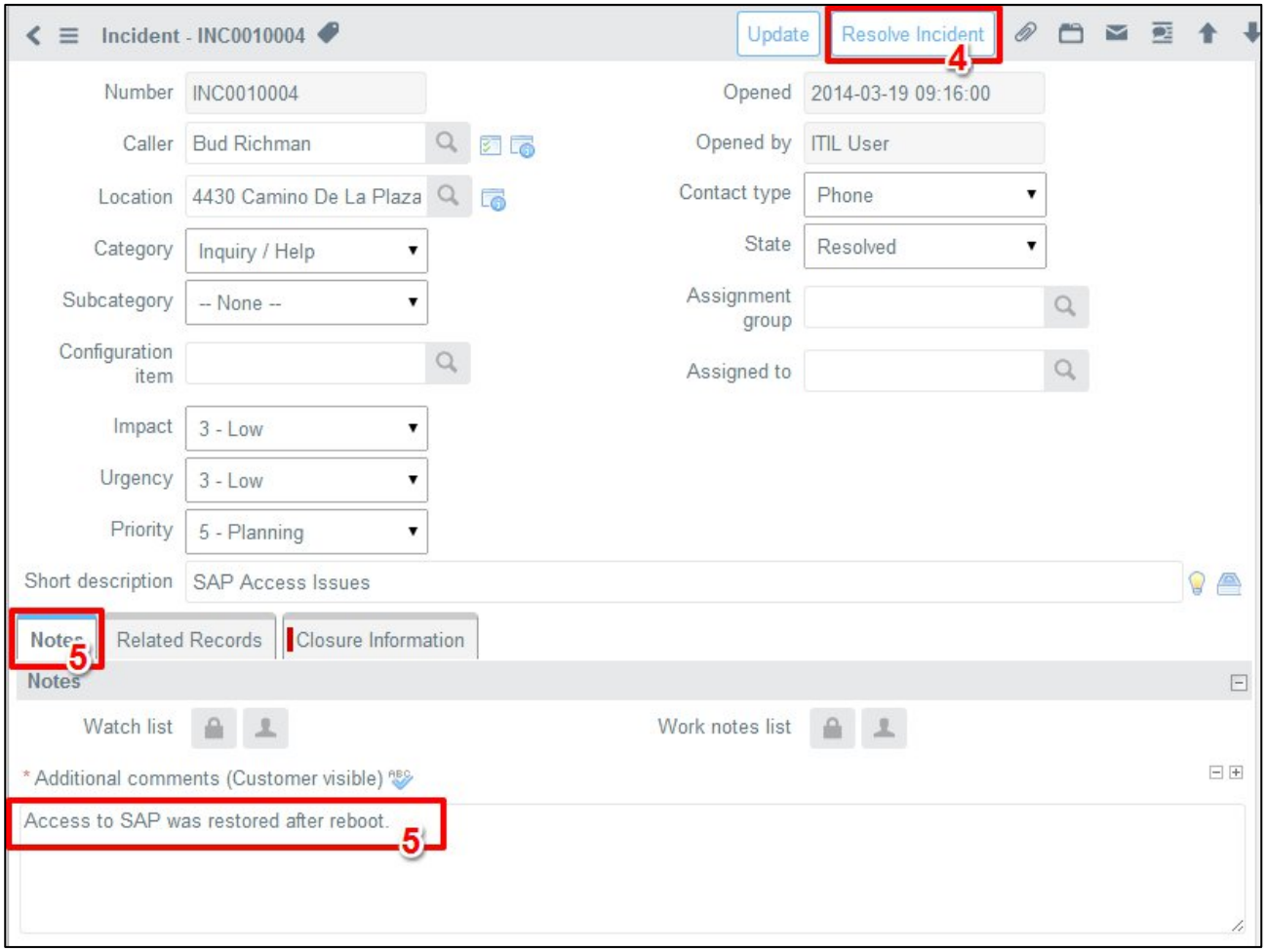
3. Navigate to **Incident > Open** then select the **Incident** for caller **Bud Richman**.

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4. Click the **Resolve Incident** button on the top right of the form.

NOTE: You must fill in all of the required fields (which are now highlighted with a red asterisk) before you can resolve the incident.

5. Select the **Notes** tab and type the following text into the **Additional Comments** field: **Access to SAP was restored after reboot.**

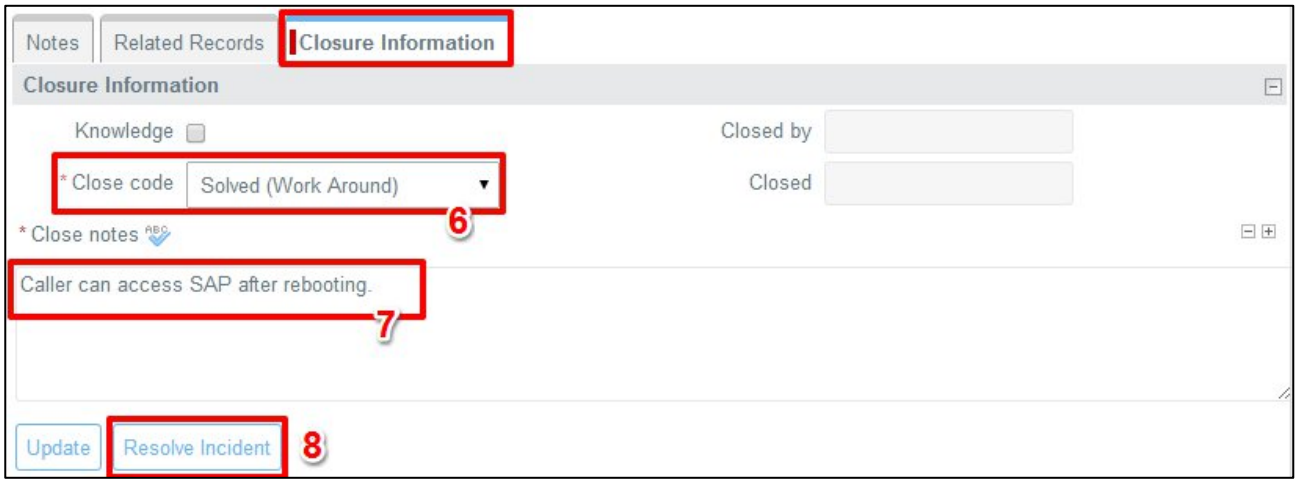


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6. Select the **Closure Information** tab and set the **Close Code** field to **Solved (Work Around).**

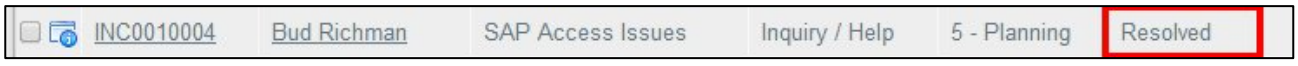
7. Type the following text into the **Close Notes** field:
   Caller can access SAP after rebooting.

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 an admin can configure an Incident form by adding an existing field to the form.

Lab 11 Configure Incident Form: Add Existing Field

Add an Existing Field to the Incident Form

1. Navigate to your training instance:
   https://<<name>>.lab.service-now.com

2. Login using the **admin** credentials provided on the cover.

3. Navigate to **Incident > Open** then select the Incident for caller **Bow Ruggeri**.

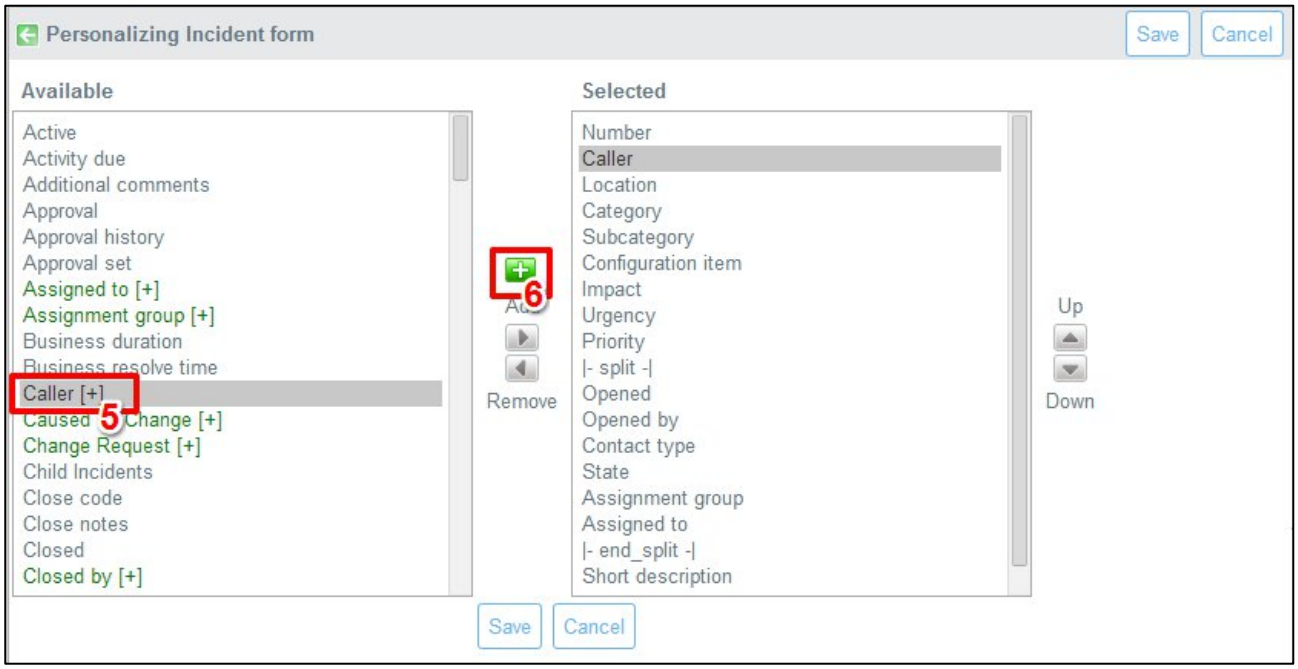
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4. Right-click the **form header** and select **Personalize > Form Layout.**

NOTE: This opens the incident form slushbucket, which is used to add existing fields to the form.

5. On the left side, select **Caller**.

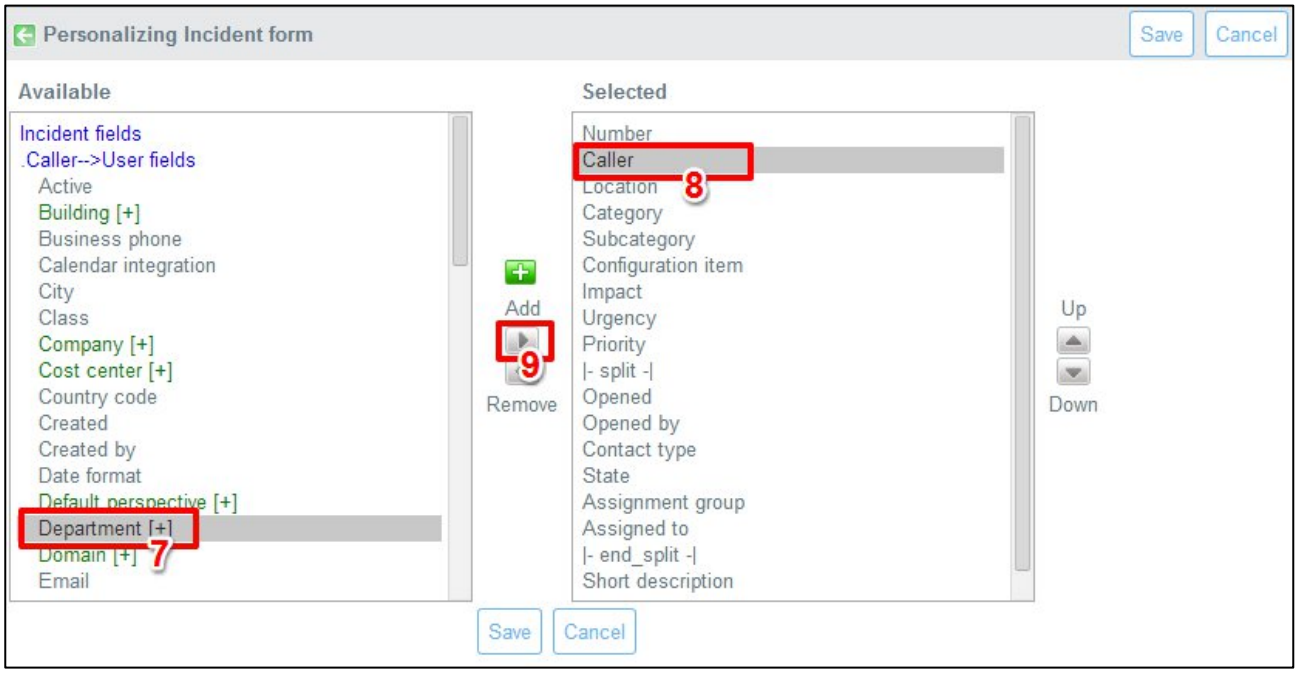
6. After selecting **Caller**, click the green plus sign  to expand the **Caller Record**.



NOTE: the plus sign displays fields from the user record in the left bucket.

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



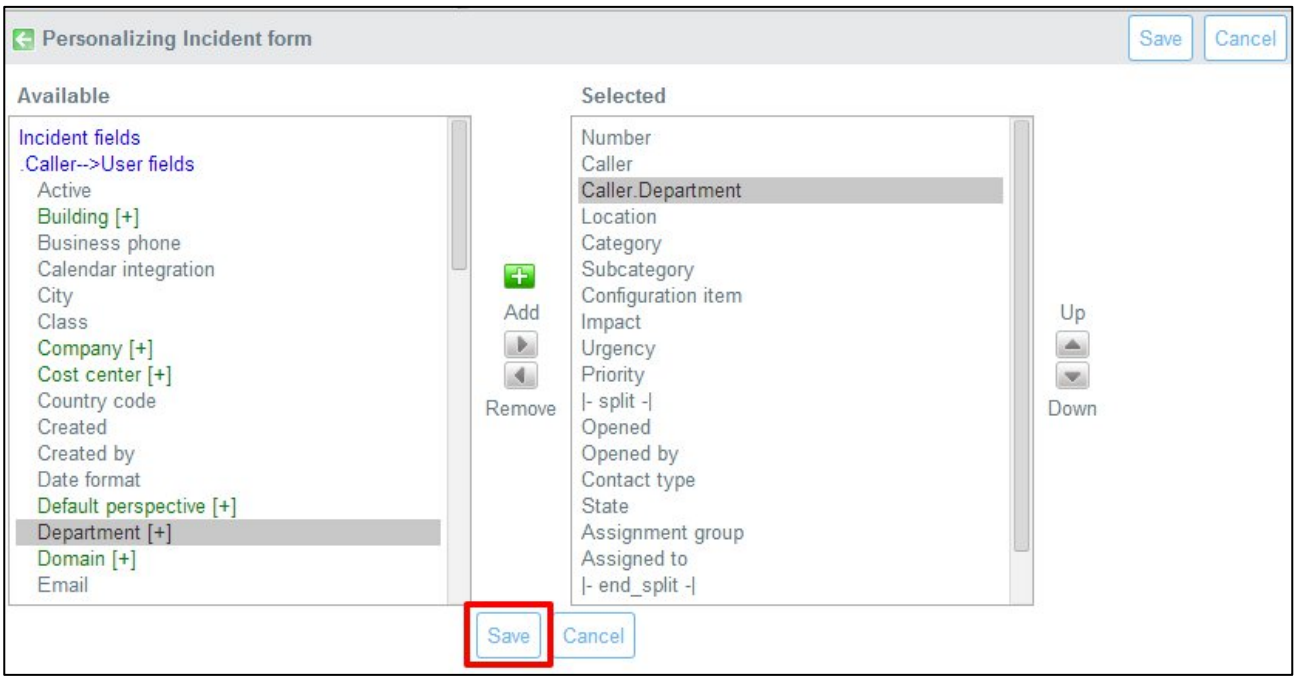
8. On the right side, select **Caller**.

NOTE: This determines where on the form the department field will display.

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9. Click the Add  button.

NOTE: The **Caller.Department** field now displays below the **Caller** field.

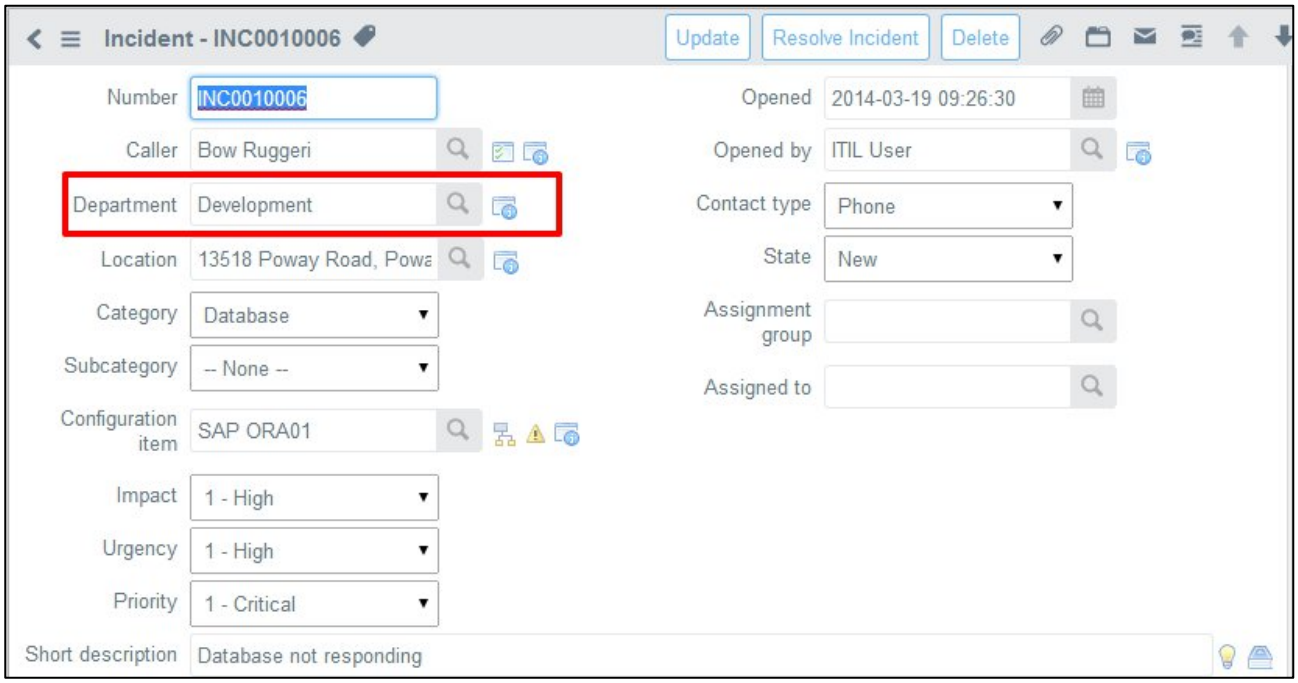


10. Click **Save.**

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Lab Success Verification

1. The screen should look like the example.



Challenge

1. Add the Caller's Manager, and Manager's Phone Number to the Form.

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Lab Goal

This lab explains how admin users configure an Incident Form by adding a new drop-down list field to the form and entering the choice values.

Lab 12 Configure Incident Form: Add a New Field

Add a New Field to the Incident Form

1. Navigate to the training instance:
   https://<<name>>.lab.service-now.com

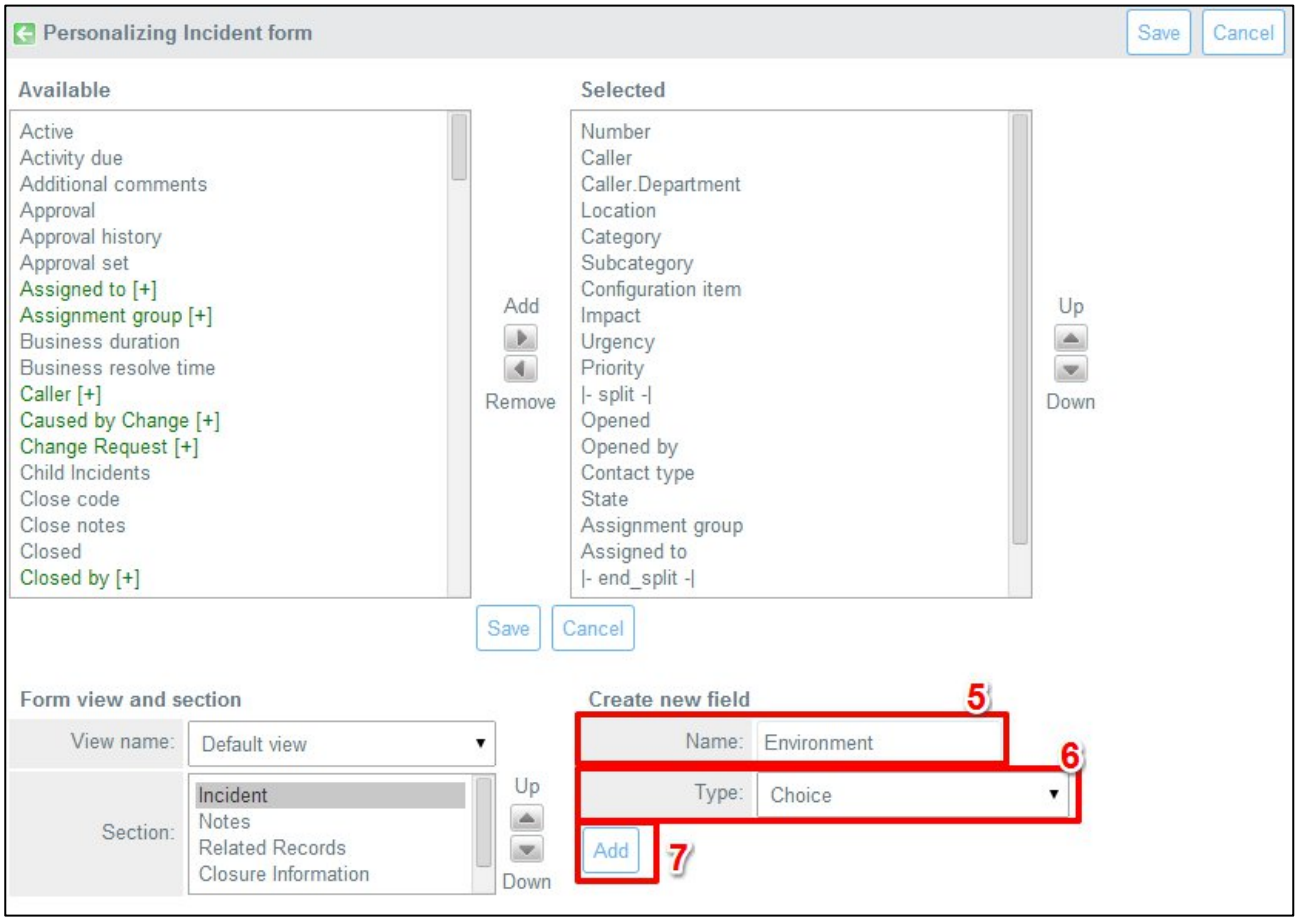
2. Log on using **admin** credentials.

3. Navigate to **Incident > Open** then select the incident for caller **Bow Ruggeri.**

4. Right-click the **form header** and select **Personalize > Form Layout.**

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5. On the bottom right, under **Create New Field**, type **Environment** into the **Name** field.



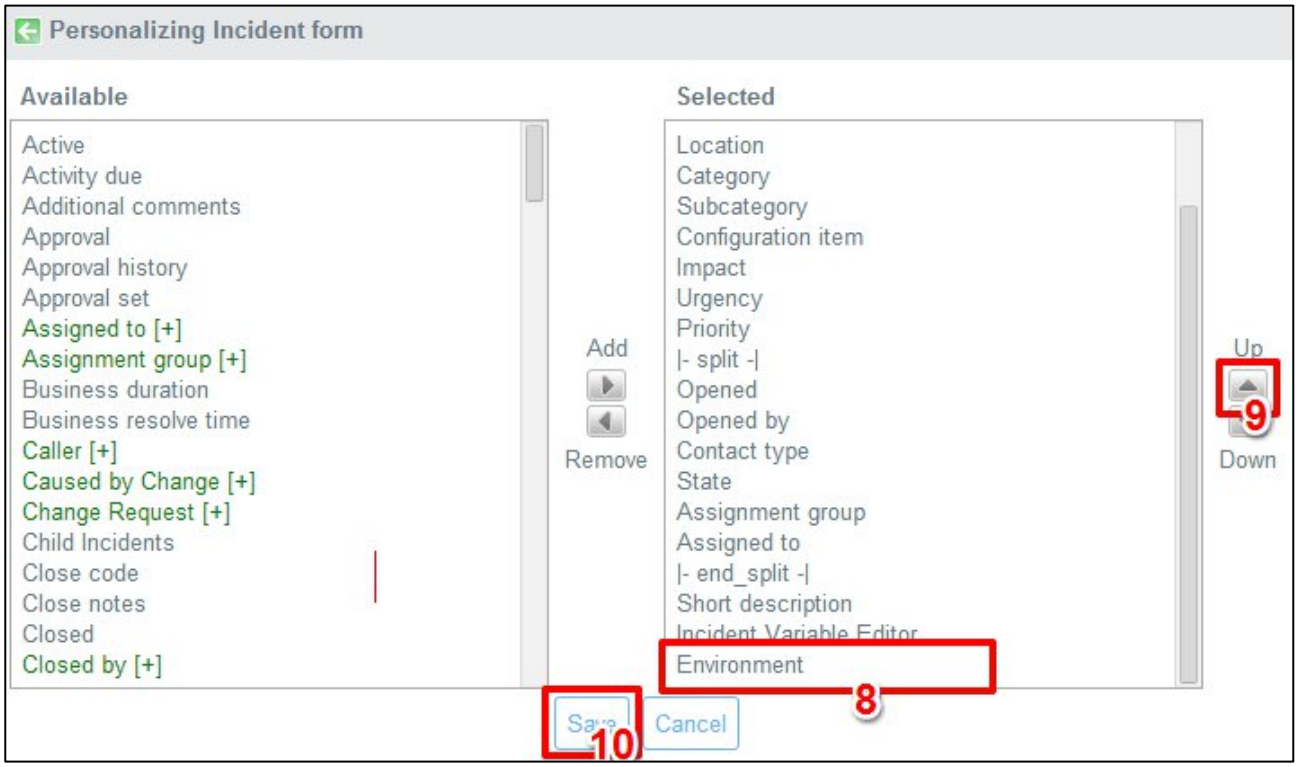
6. Change the **Type** field to **Choice.**

7. Click **Add.**

NOTE: Clicking **Add** places the new field at the bottom of the list on the right side of the list of fields selected for the form.

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8. Click to highlight the new **Environment** field.

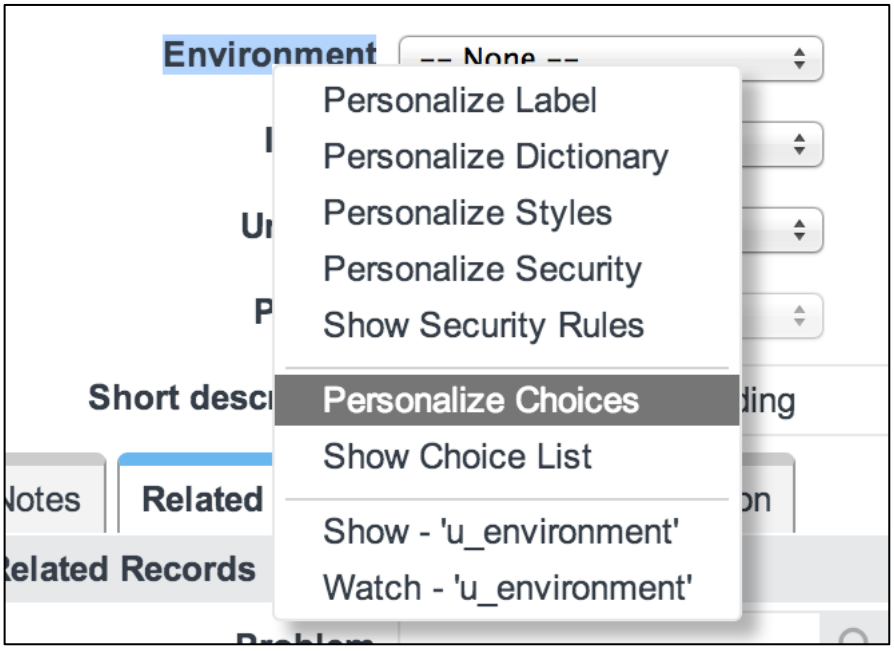


9. Click the **Up** arrow to move the **Environment** field below the **Configuration Item** field.

10. Click **Save.**

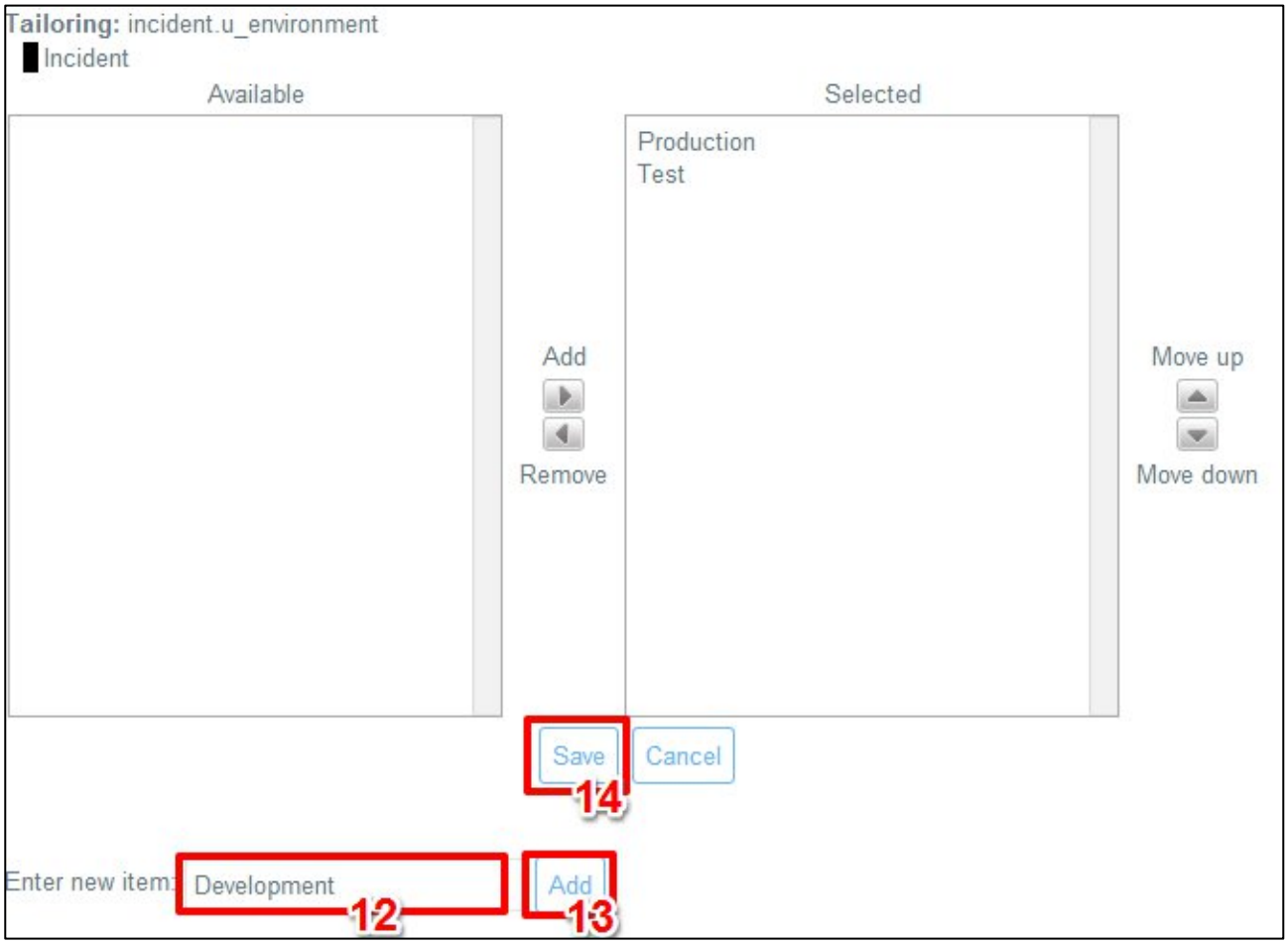
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11. On the **Incident Form**, right-click the **Environment** field label and select **Personalize Choices.**



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12. On the bottom of the page, add the following items: **Development, Production, Test.**



13. Click **Add** after each item.

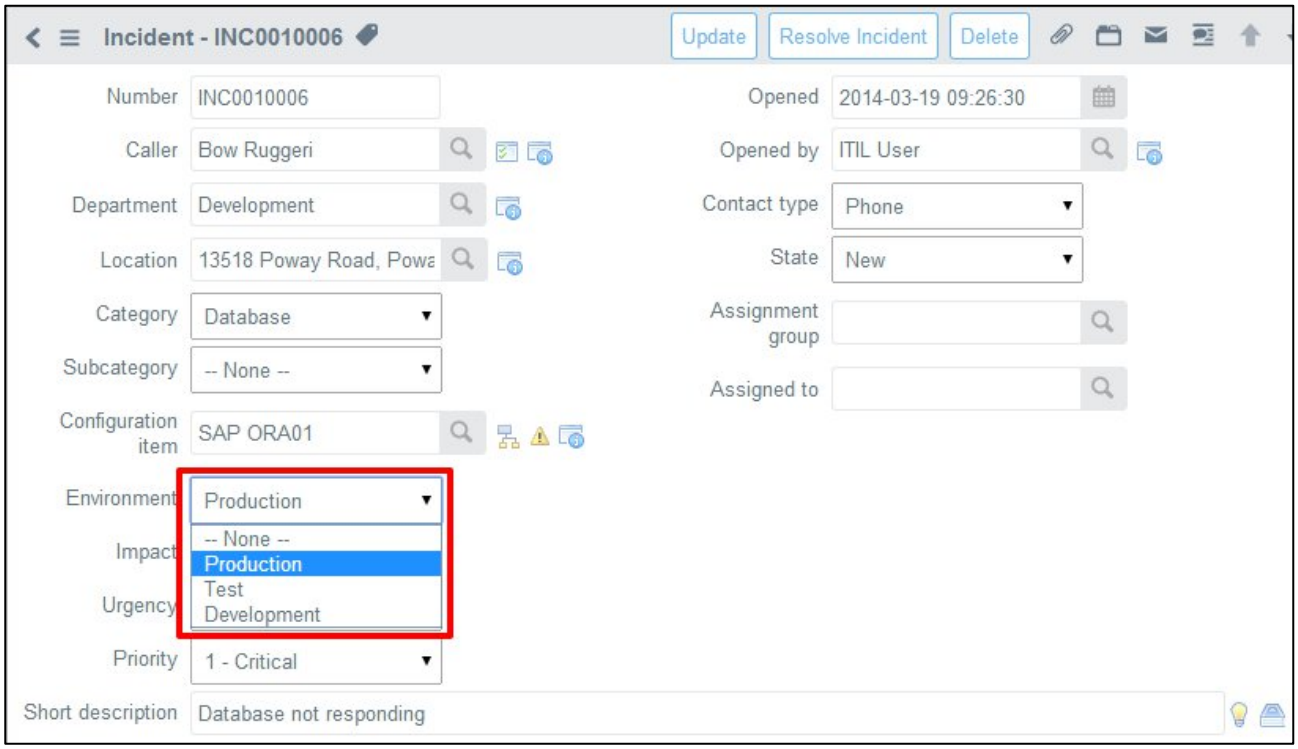
14. Click **Save.**

15. On the **Incident Form**, click the **Environment** drop-down list to confirm that the added choices are visible.

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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 admin users configure an Incident Form field if the Category is Software by adding a new UI policy.

Lab 13 Configure Incident Form: Add UI Policy

Create a UI Policy for the New Field

1. Navigate to the training instance: **https://<<name>>.lab.service-now.com**

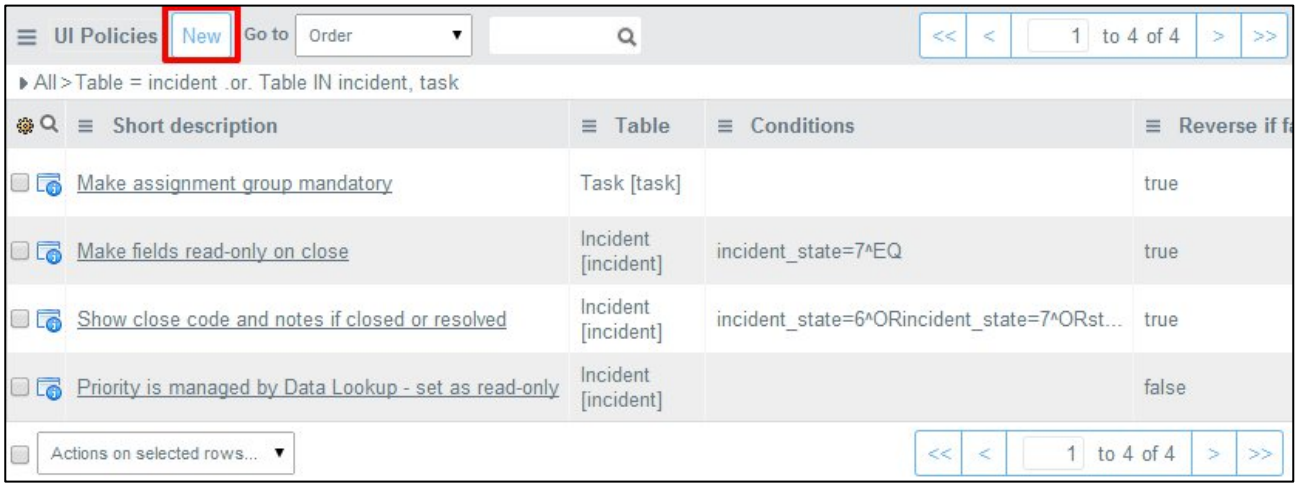
2. Log on using **admin** credentials.

3. Navigate to **Incident > Open** then select the Incident for caller **Bow Ruggeri.**

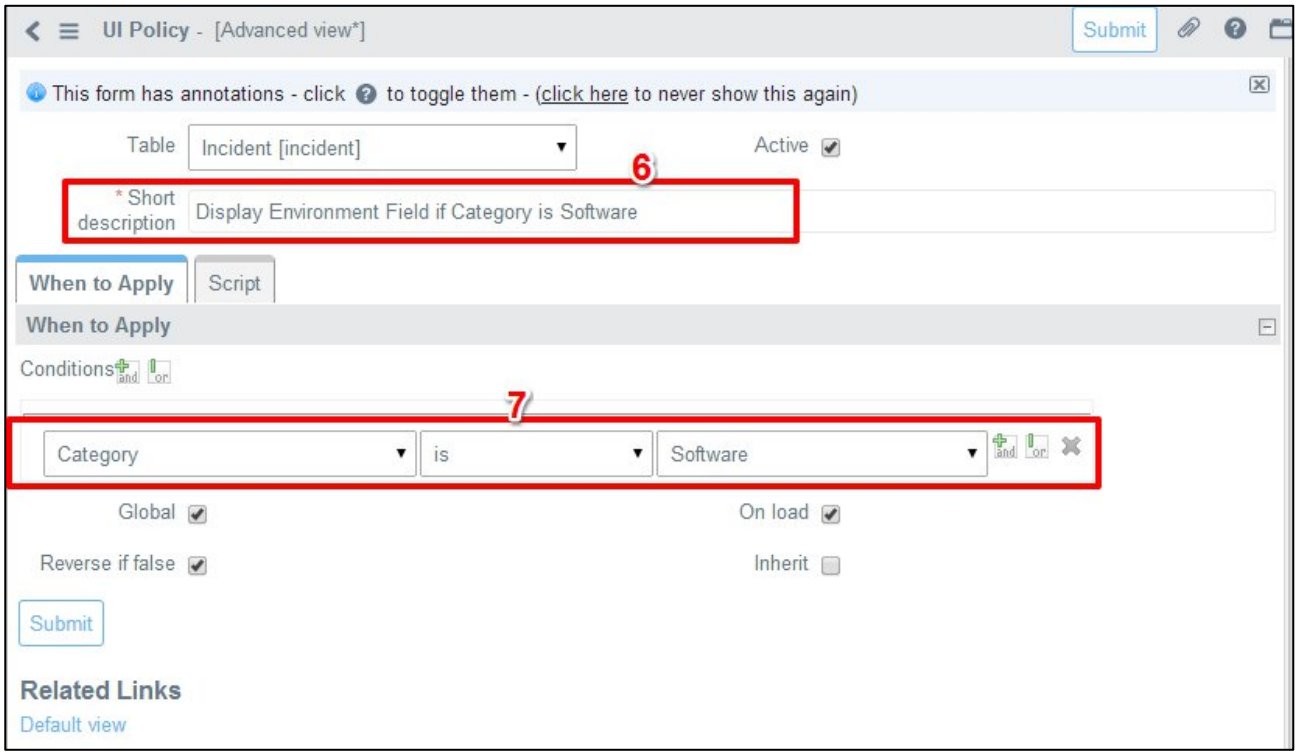
4. Right-click the **form header** and select **Personalize > UI Policies.**

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5. Click **New** to create a new **UI Policy**.



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



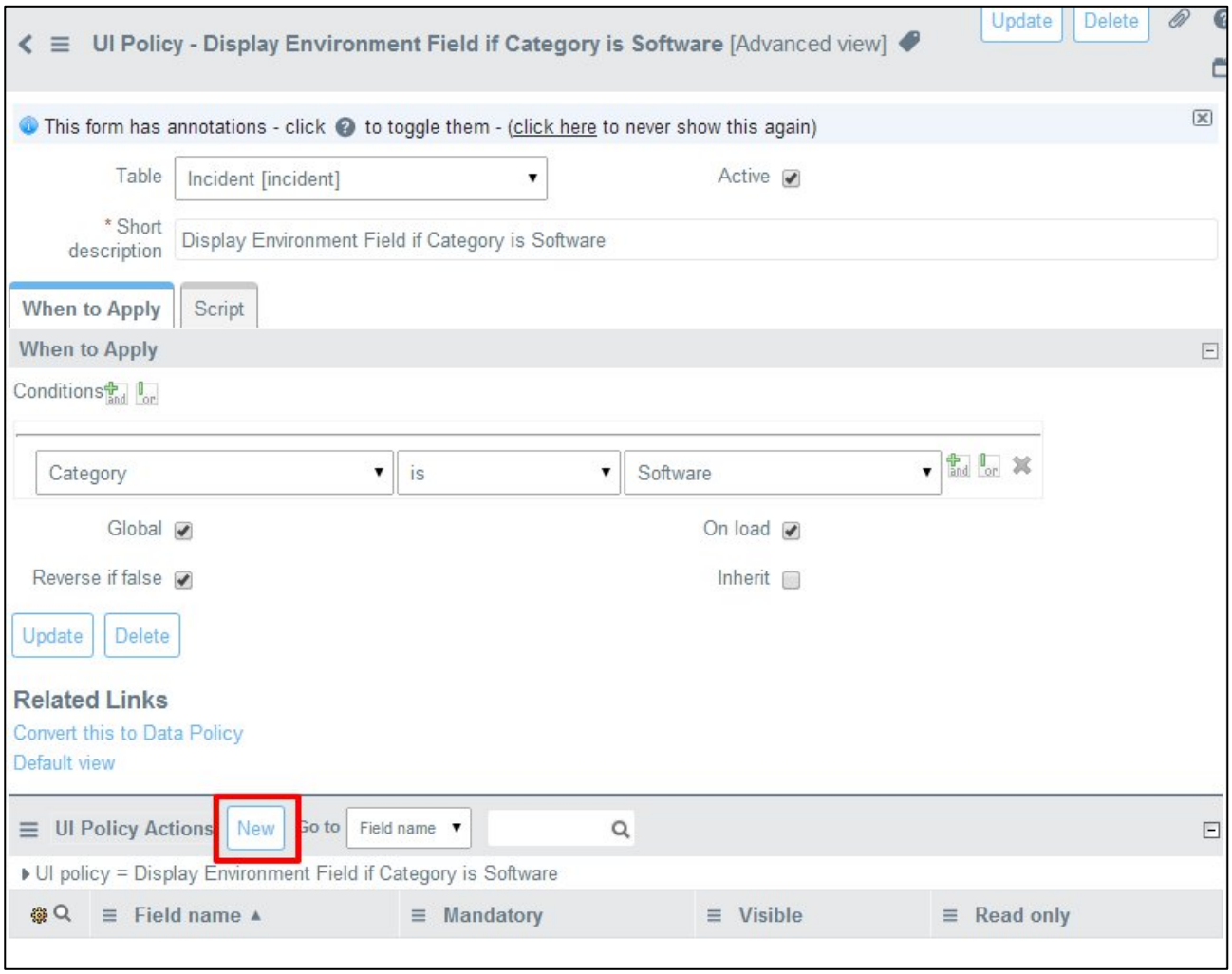
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7. Using the **Conditions** builder, select **Category is Software.**

8. Right-click the **form header** and click **Save.**

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

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



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



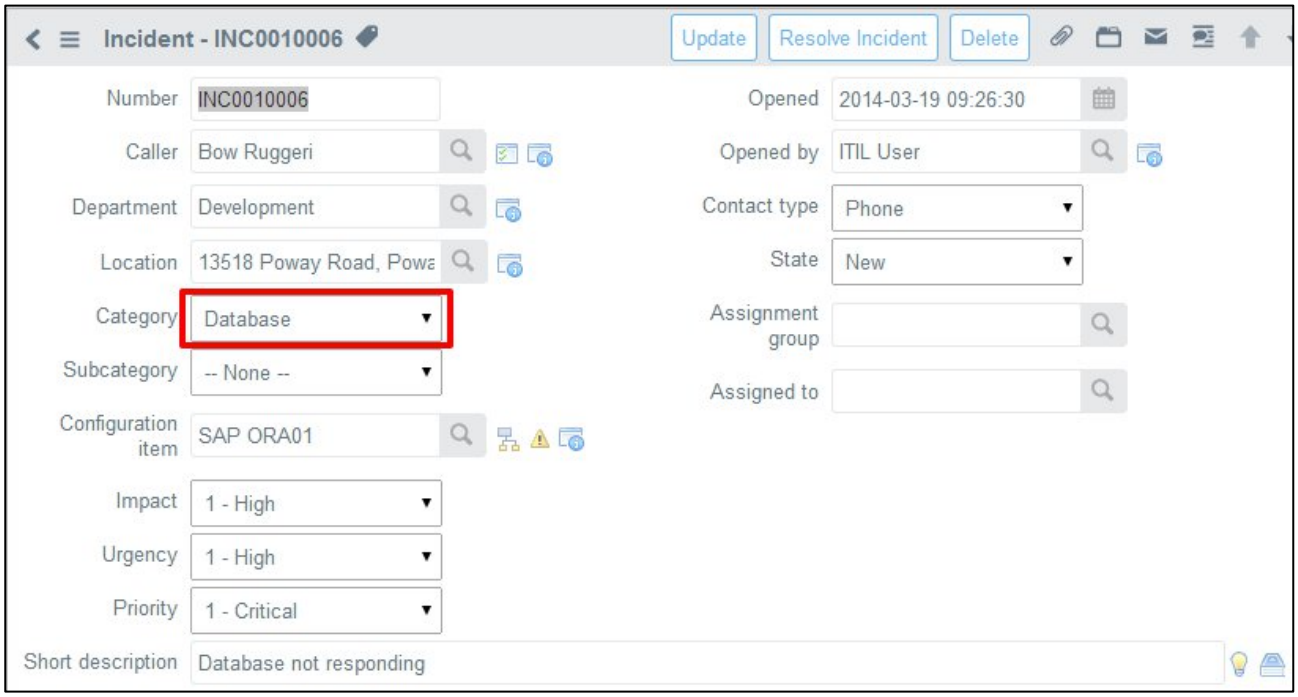
12. Set **Mandatory** to **True**.

13. Set **Visible** to **True.**

14. Click **Submit.**

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15. Navigate to **Incident > Open** then select the incident for caller **Bow Ruggeri.**



NOTE: Since the **Category** is **Database**, the **Environment** field is not visible.

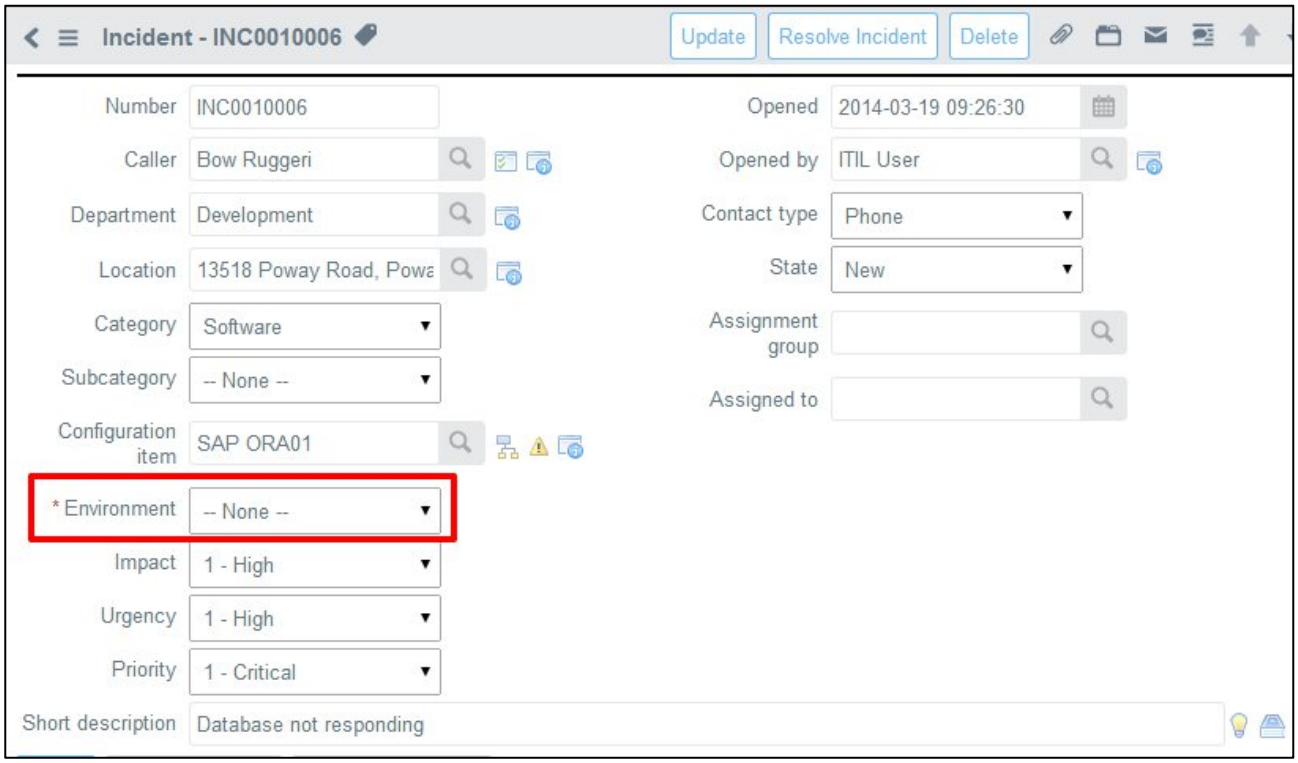
16. Change the **Category** to **Software.**

NOTE: Changing the **Category** to **Software** makes the **Environment** field 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 admin users create an **Assignment Rule** to automatically assign incidents.

Lab 14
Incident Automation

Create an Assignment Rule.

1. Navigate to the training instance:
   https://<<name>>.lab.service-now.com

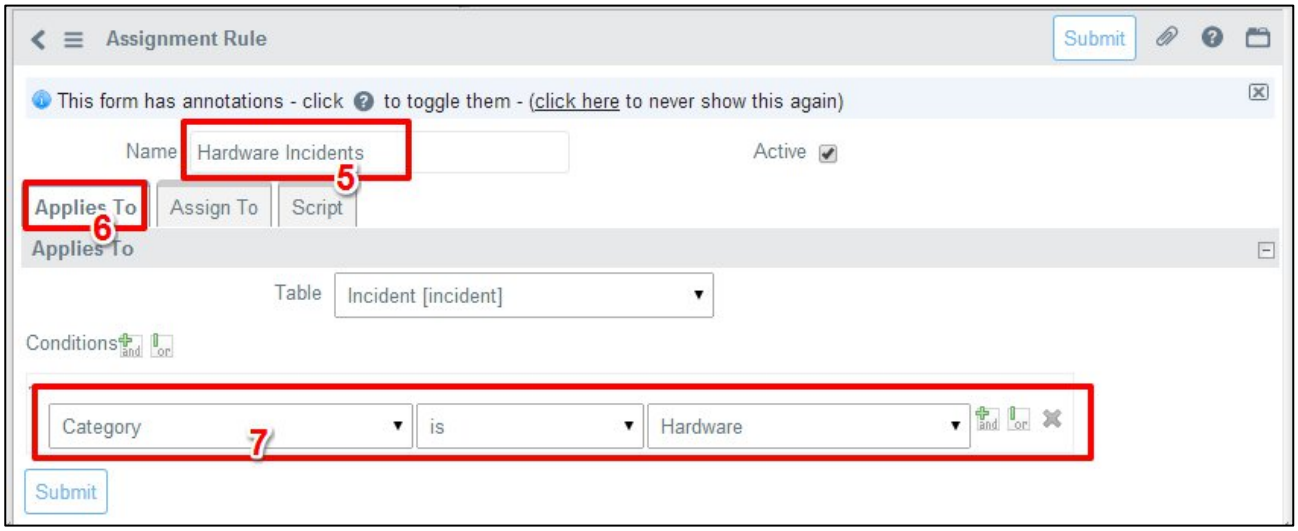
2. Log on using **admin** credentials.

3. Navigate to **System Policy > Rules > Assignment**.

4. Click **New** to create a new **Assignment Rule**.

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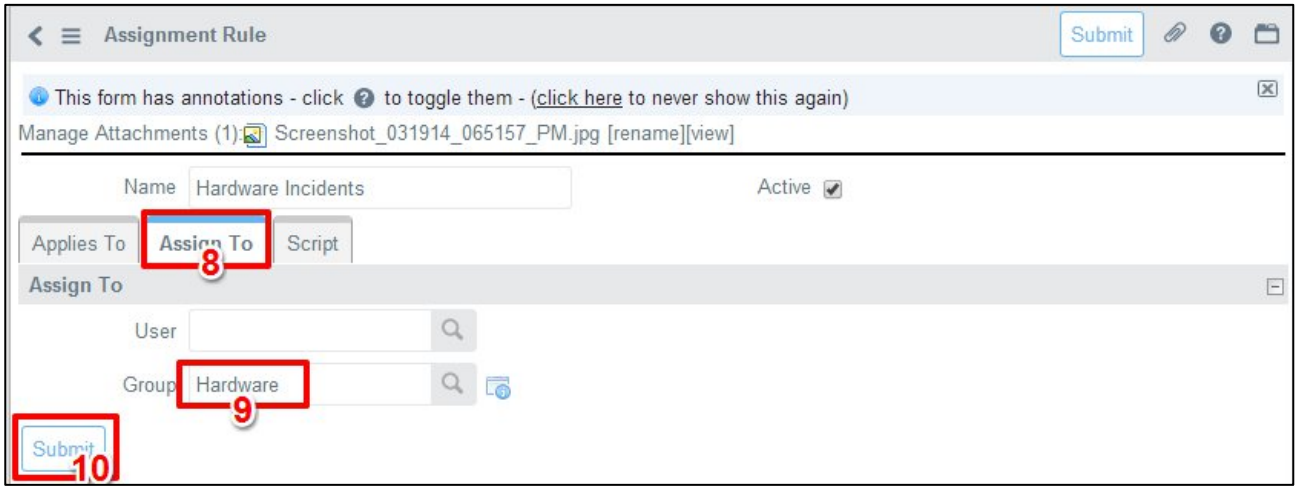
5. Set the Name to **Hardware Incidents**.



6. Select the **Applies To** tab.

7. Set the **Condition** to **Category is Hardware**.

8. Select the **Assign To** tab.



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9. Set the **Group** to **Hardware**.

10. Click **Submit**.

NOTE: To test the new Assignment Rule, create a new Incident and set the **Category** to **Hardware**.

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

12. Set the **Caller** field to **Joe Employee**.

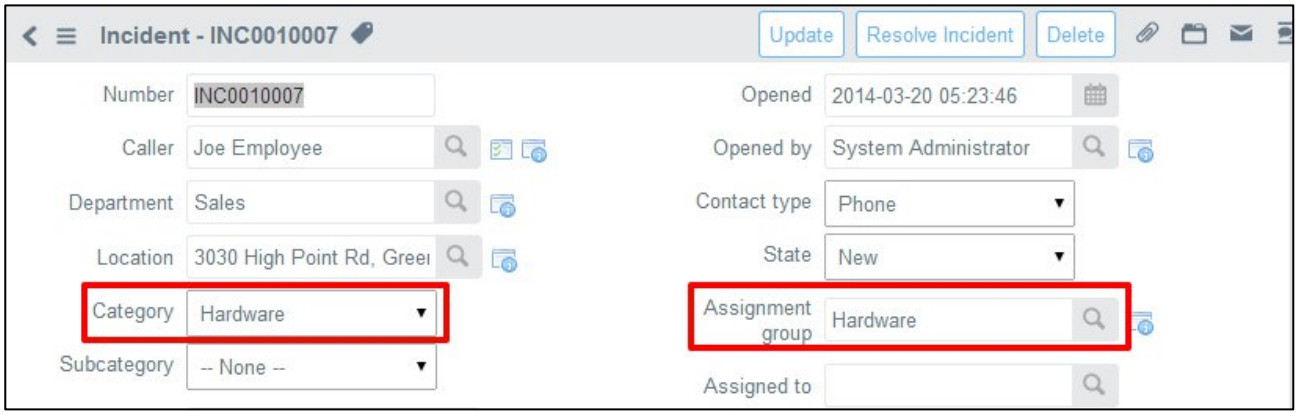
13. Set the **Category** to **Hardware**.

14. Right-click the form header and click **Save**.

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

Lab Success Verification

1. The screen should look like the example.



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Lab Goal

This lab explains how admin users change Incident Priority by modifying the Priority Lookup Rules for a specific caller.

Lab 15 Incident Automation: Modify Lookup Rules

Modify the Priority Lookup Rules

1. Navigate to the training instance: **https://<<name>>.lab.service-now.com**

2. Log on using **admin** credentials.

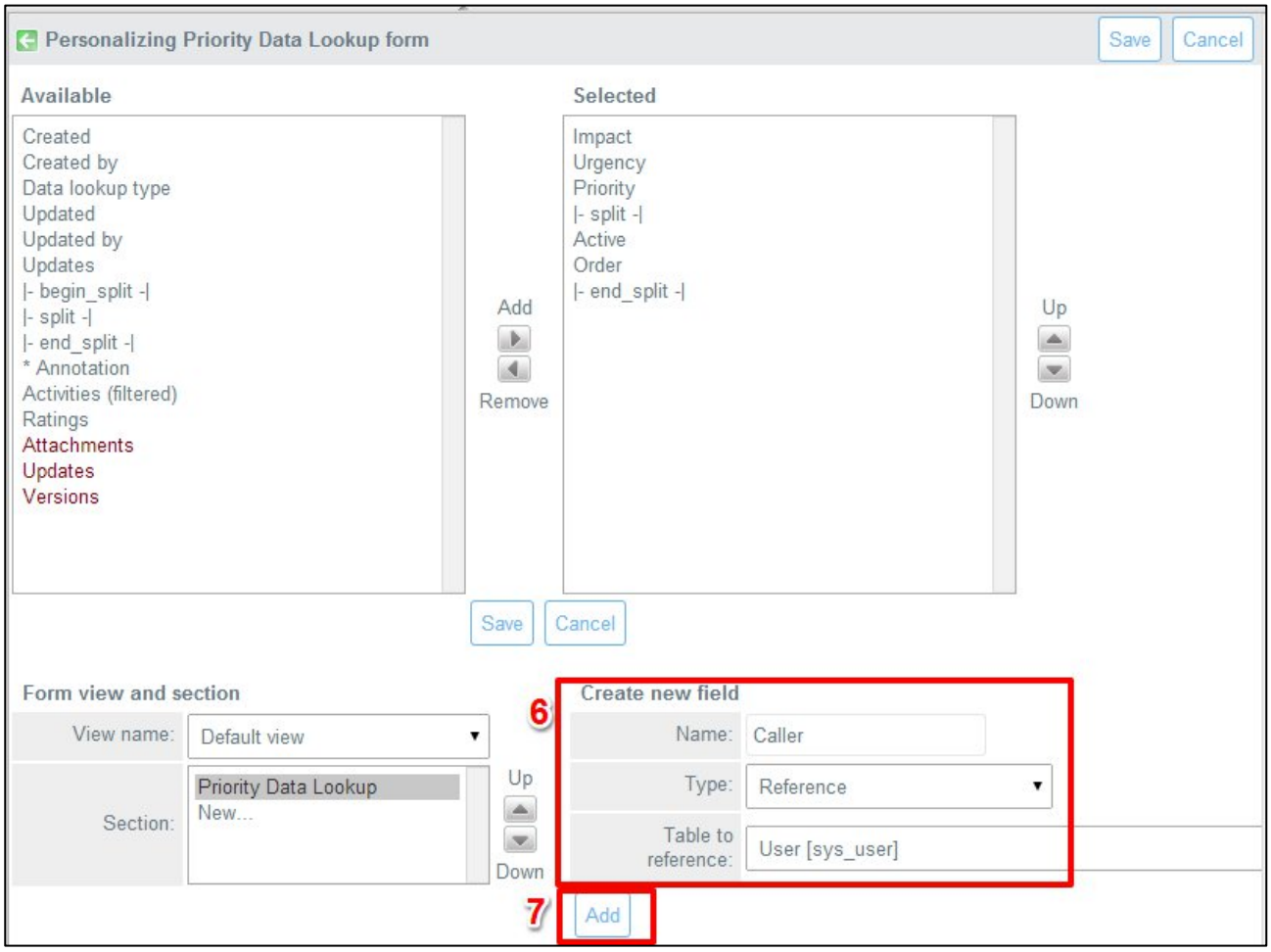
3. Navigate to **System Policy > Rules > Priority Lookup Rules**.

4. Click **New** to create a new **Priority Lookup**.

5. Right-click the **form header** and select **Personalize > Form Layout.**

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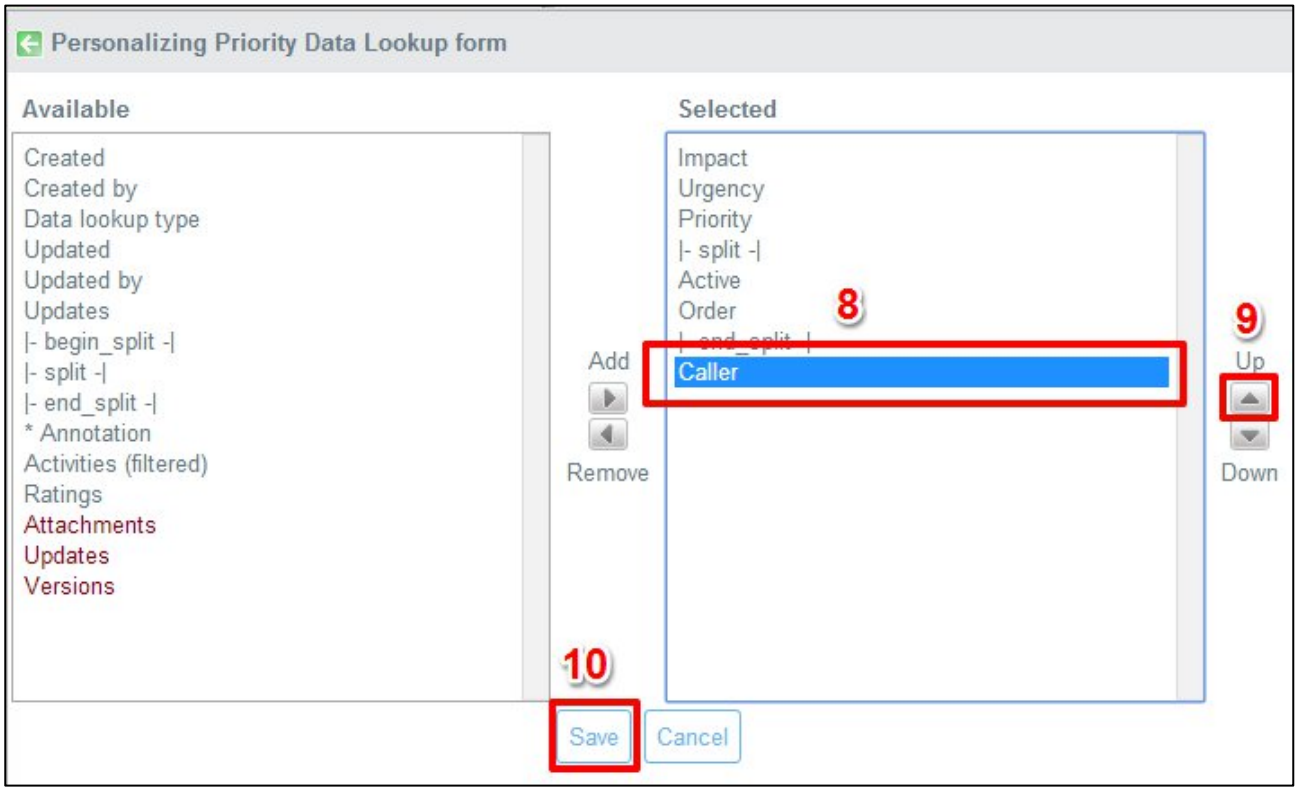
6. Create a new **Reference** field called **Caller** that references the **User (sys_user)** table.



7. Click **Add**.

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8. Click to highlight the new **Caller** field.

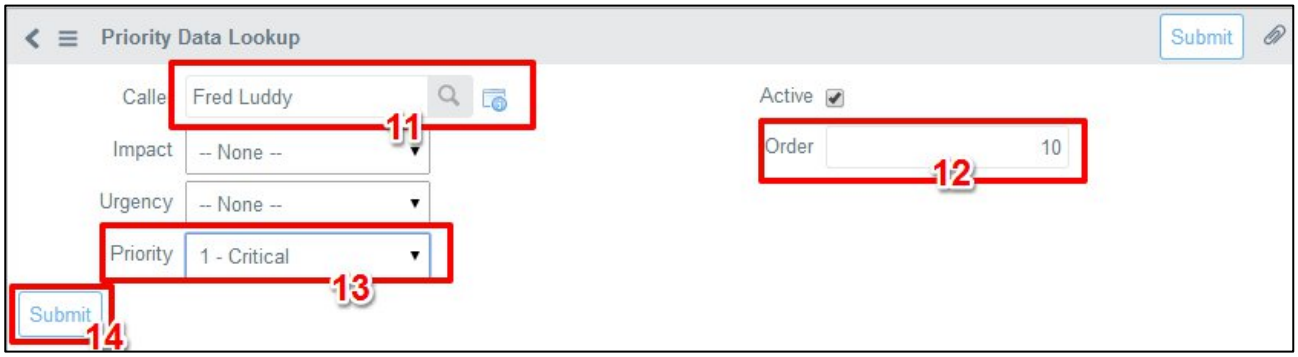


9. Use the **Up** arrow to move the **Caller** field to the top of the list.

10. Click **Save**.

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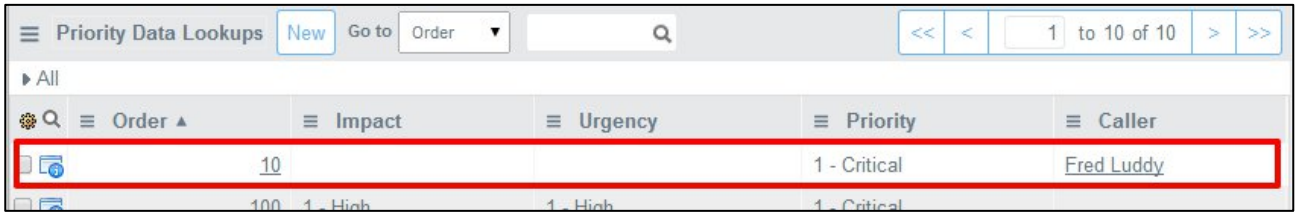
11. On the **Priority Data Lookup** form, set the **Caller** field to **Fred Luddy**.



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

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

14. Click **Submit**. The Priority Data Lookups displays the **Caller** with the updated **Priority**

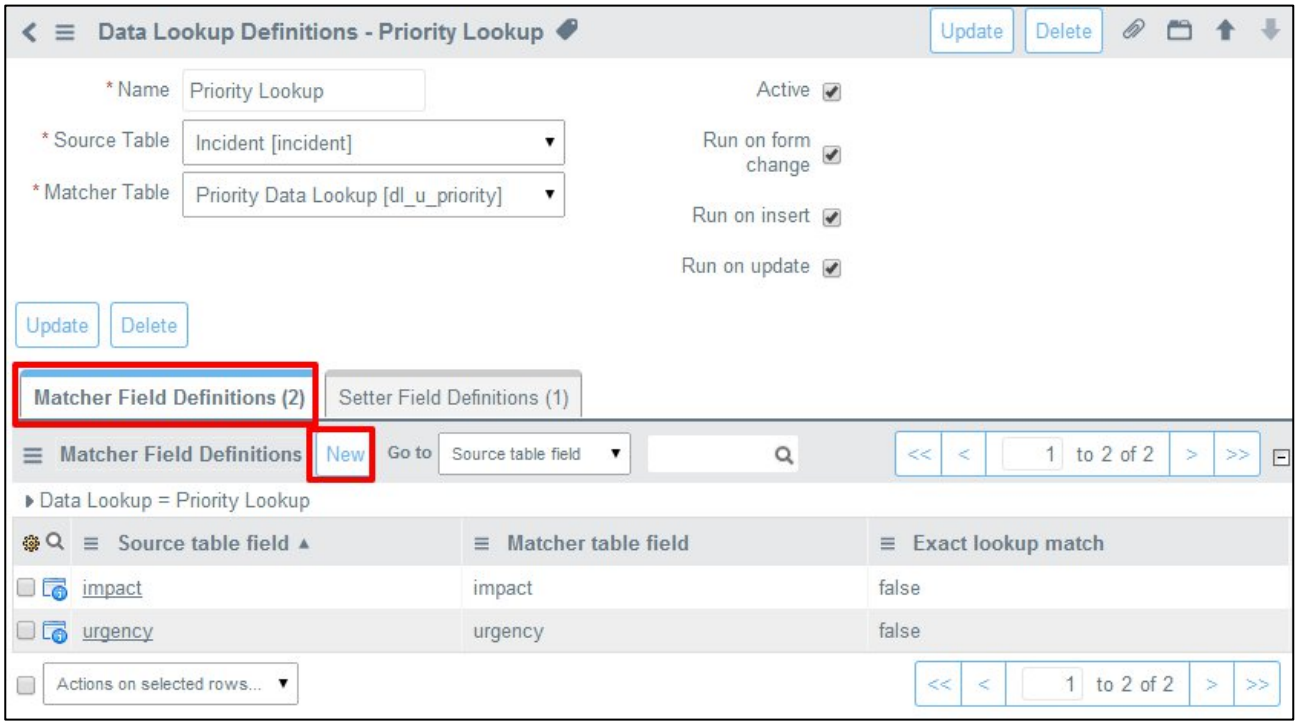


15. Navigate to **System Policy > Rules > Data Lookup Definitions.**

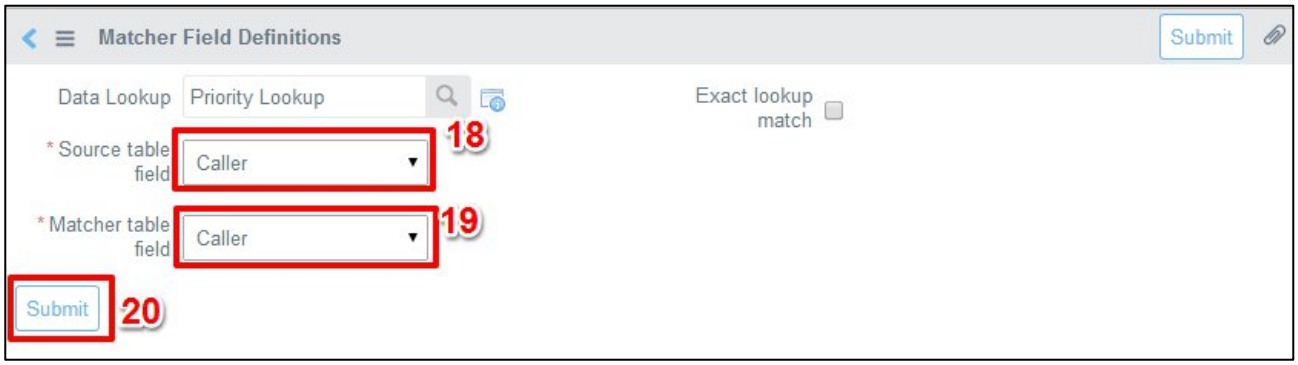
16. Click to open **Priority Lookup.**

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17. Under the **Matcher Field Definitions** tab, click **New**.



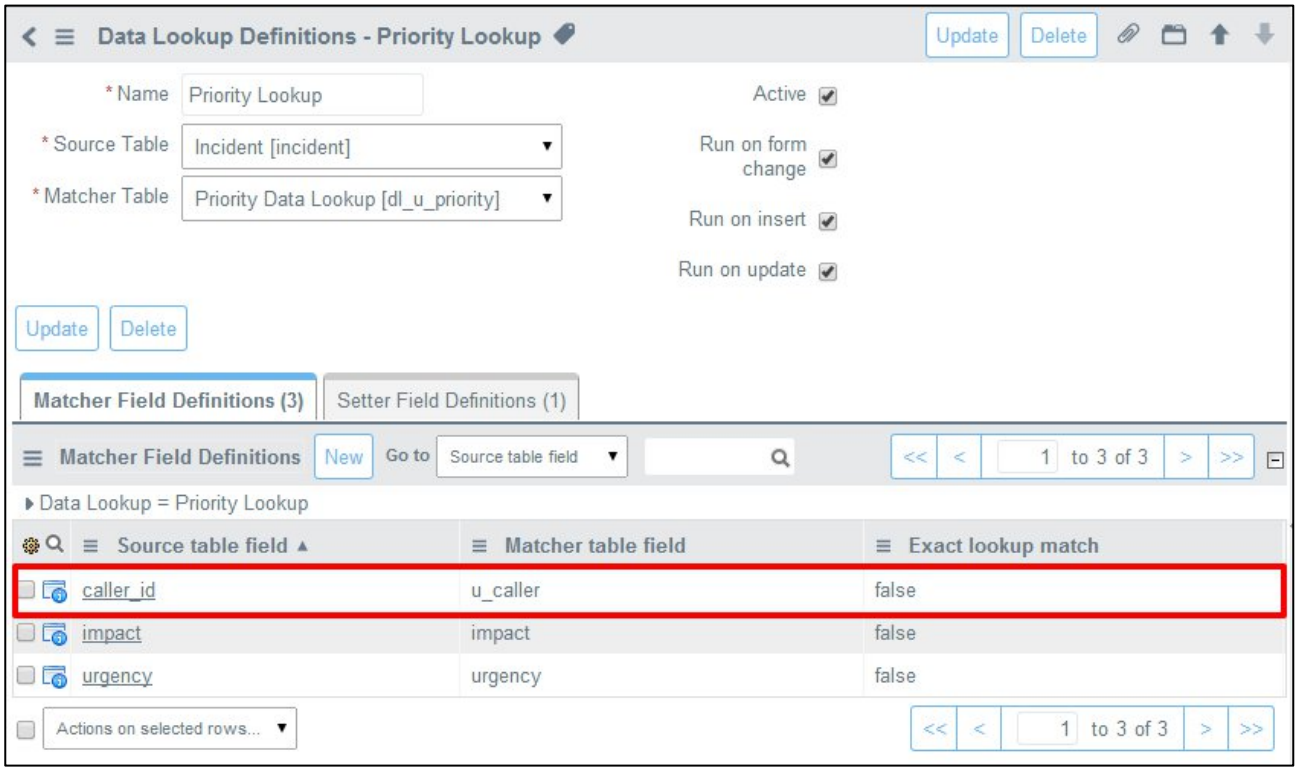
18. Set **Source table field** to **Caller**.



19. Set **Matcher table field** to **Caller**.

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20. Click **Submit**. The Source and Match columns display the appropriate caller table names.



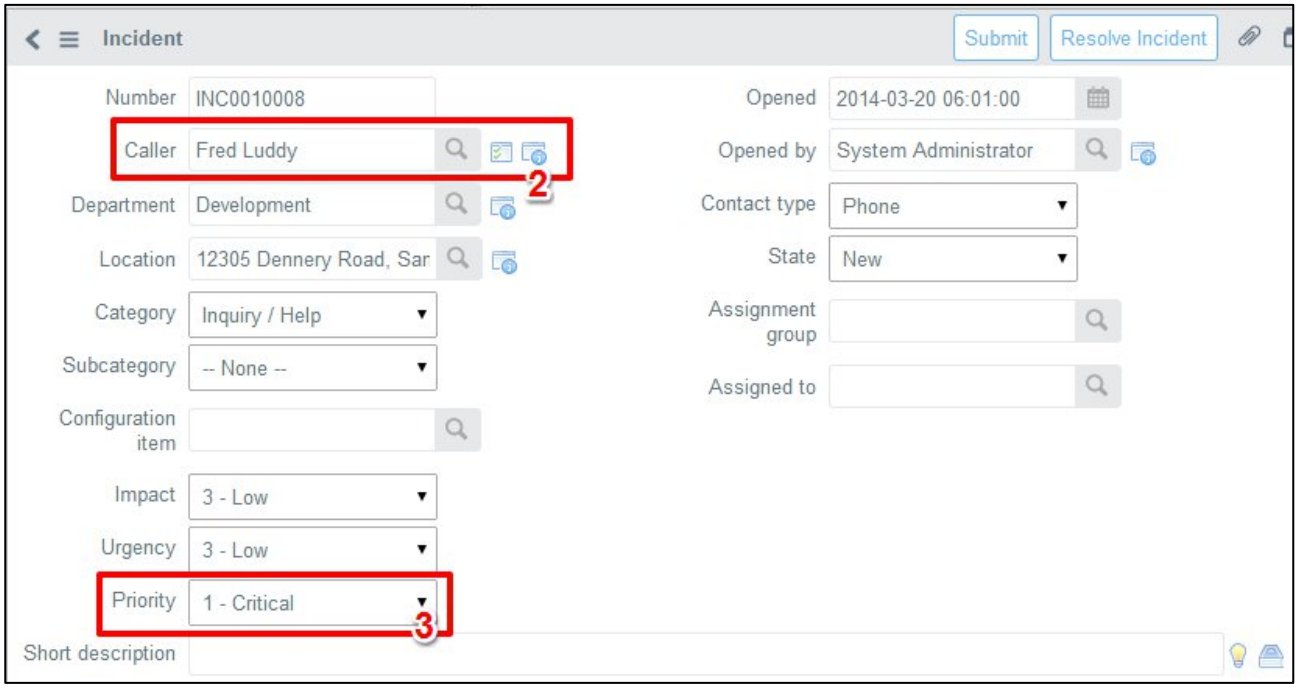
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Lab Success Verification

1. Create a new **Incident**.

2. Set the **Caller** to **Fred Luddy**.

3. Verify that **Priority** is **1 – Critical**.



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Lab Goal

This lab explains how admin users create a client script that sets the Assignment Group based on the CI support group.

Lab 16 Incident Automation: Set Assignment Group

Create a Client Script to Set Assignment Group

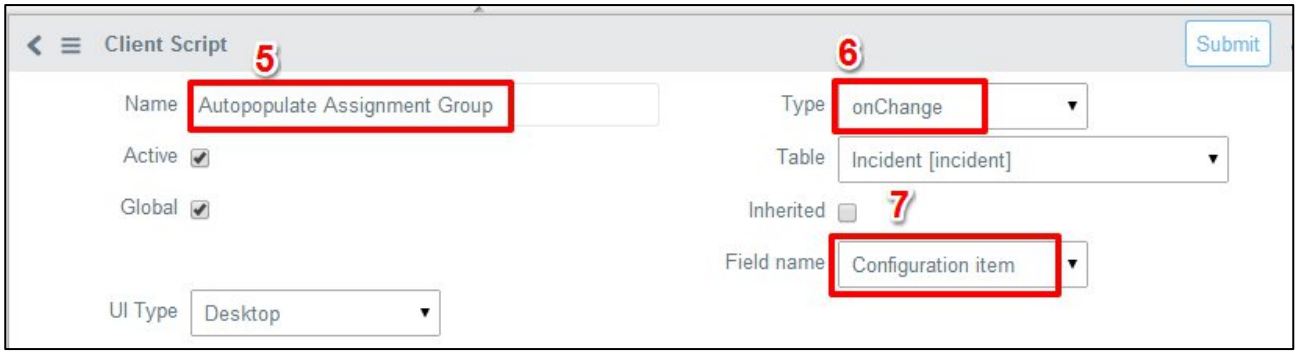
1. Navigate to the training instance:
   https://<<name>>.lab.service-now.com

2. Log on using **admin** credentials.

3. Navigate to **Incident > Open**. Right-click the **header** and select **Personalize > Client Scripts**.

4. Click **New** to create a new **Client Script**.

5. Set the **Name** field to **Autopopulate Assignment Group**.



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6. Set the **Type** to **onChange**.

7. Set the **Field name** to **Configuration Item**.

   Paste the following into the script section:

```
function onChange(control, oldValue, newValue, isLoading) {
   if (isLoading || newValue == '') {
         return;
   }

   if (newValue != oldValue) {
         var thisCI = g_form.getReference('cmdb_ci', callBack);
   }

   function callBack(thisCI) {
         var supportGroup = thisCI.support_group;
         if (supportGroup != '') {
               g_form.setValue('assignment_group', supportGroup);
         }
   }
}
```

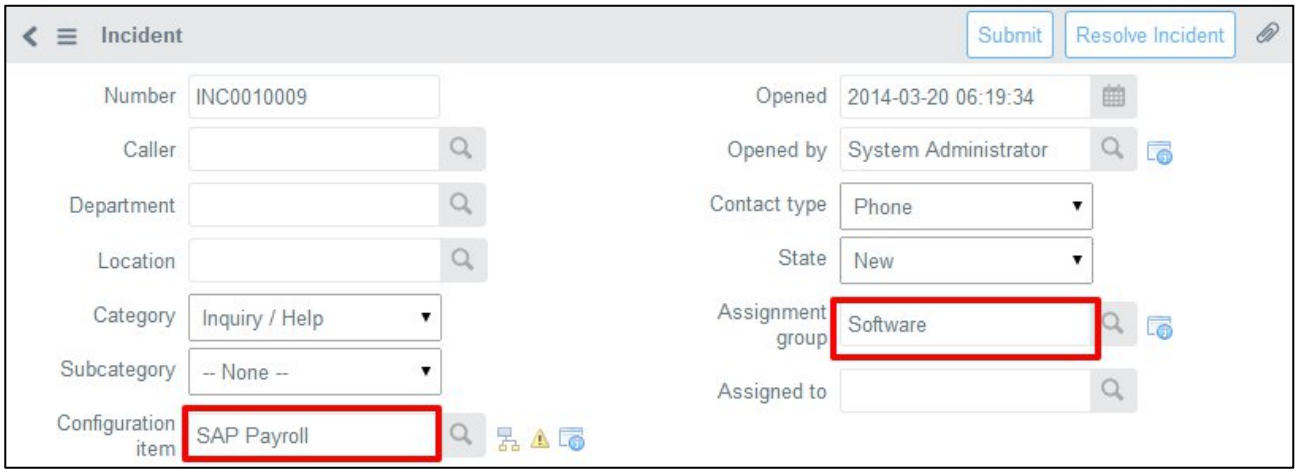
8. Click the **Check Syntax** icon  to check the code.

9. Click **Submit.**

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Lab Success Verification

1. Create a new Incident. Set the Configuration Item to SAP Payroll.

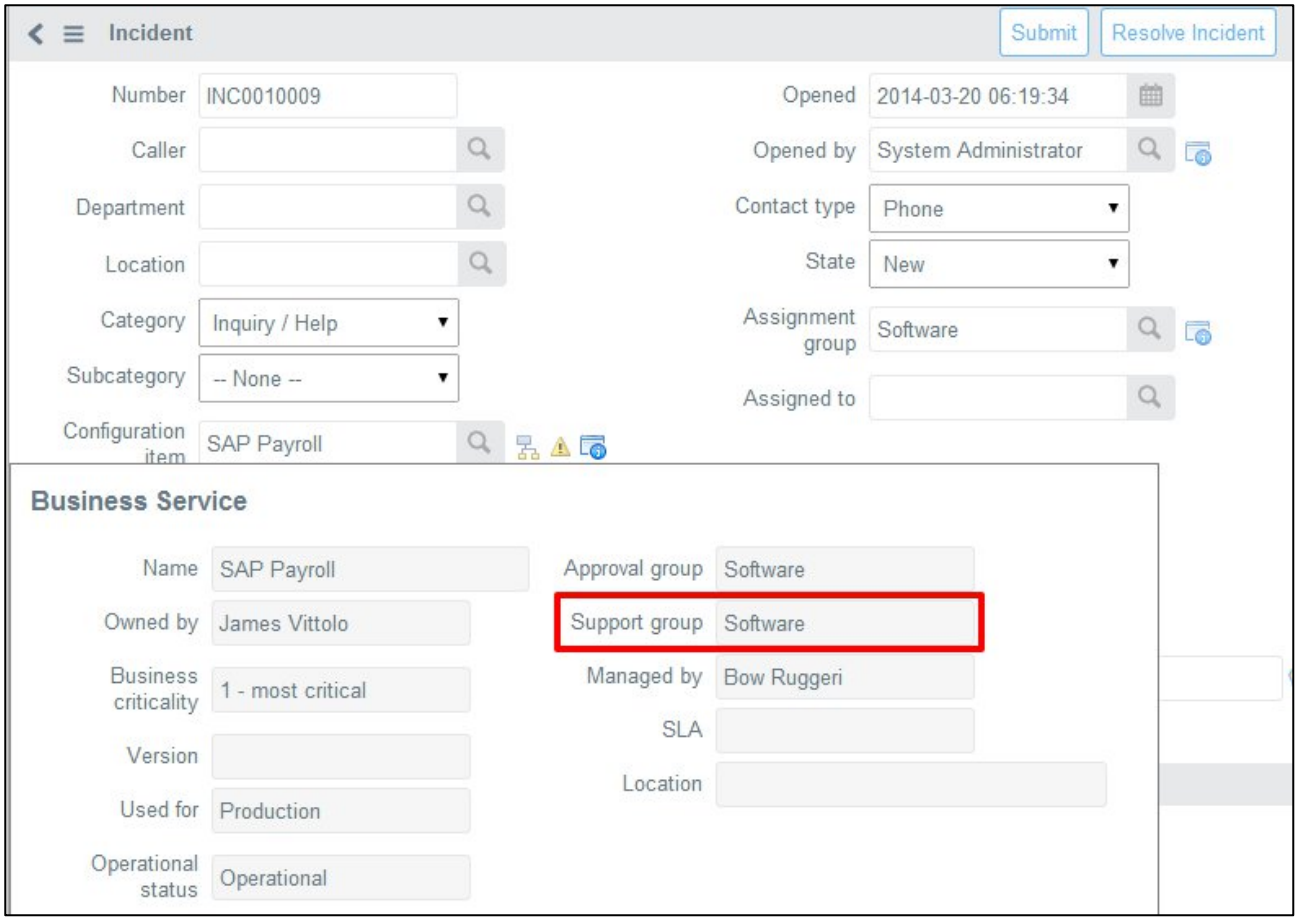


NOTE: the Assignment Group changes to **Software**.

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

3. Verify that the **Support Group** for **SAP Payroll** is **Software.**



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