knowledge14®

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Incident 101 – From Creation to Resolution

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Introduction

- This session will help you:
  - Understand the differences between incident interfaces
  - Leverage out of box integrations between incident and change
  - Use knowledge management during the course of resolving an incident
  - Configure the incident management form with new and existing fields
  - Explore the Business Service Map
  - Resolve an incident

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Lab Agenda

A brief introduction to Incident Management

Hints and tips

Lab Exercises

Q&A

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Incident Management

A brief overview

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What is Incident Management?

"The goal of incident management is to restore service operation as quickly as possible … while minimizing impact to business operations…"

ServiceNow Wiki

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Incident Management in ServiceNow

ServiceNow provides tools to optimize Incident Management

1. Creating
   - Incidents may be identified and created directly by users or through automated integration from monitoring systems to the ServiceNow platform.

2. Categorizing & Prioritizing
   - By default, ServiceNow provides category and subcategory fields to categorize incidents; these attributes can be leveraged for automatic assignment. Priority for an incident is assigned according to ITIL recommendations: impact and urgency determine priority.

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Incident Management in ServiceNow Continued

ServiceNow provides tools to optimize Incident Management

3. Diagnosing
   - Largely a human process, diagnosis relies on information in the CMDB and communication with the reporting user or system to determine the cause.

4. Escalating
   - The platform provides a built-in system of escalation rules to ensure fast resolution of incidents: Service Level Agreements and Inactivity Monitors

5. Resolving
   - Once relief is provided to the customer, the incident state should be set to **Resolved** to stop escalators, and to allow the user to review the relief provided before moving the state to **Closed**.

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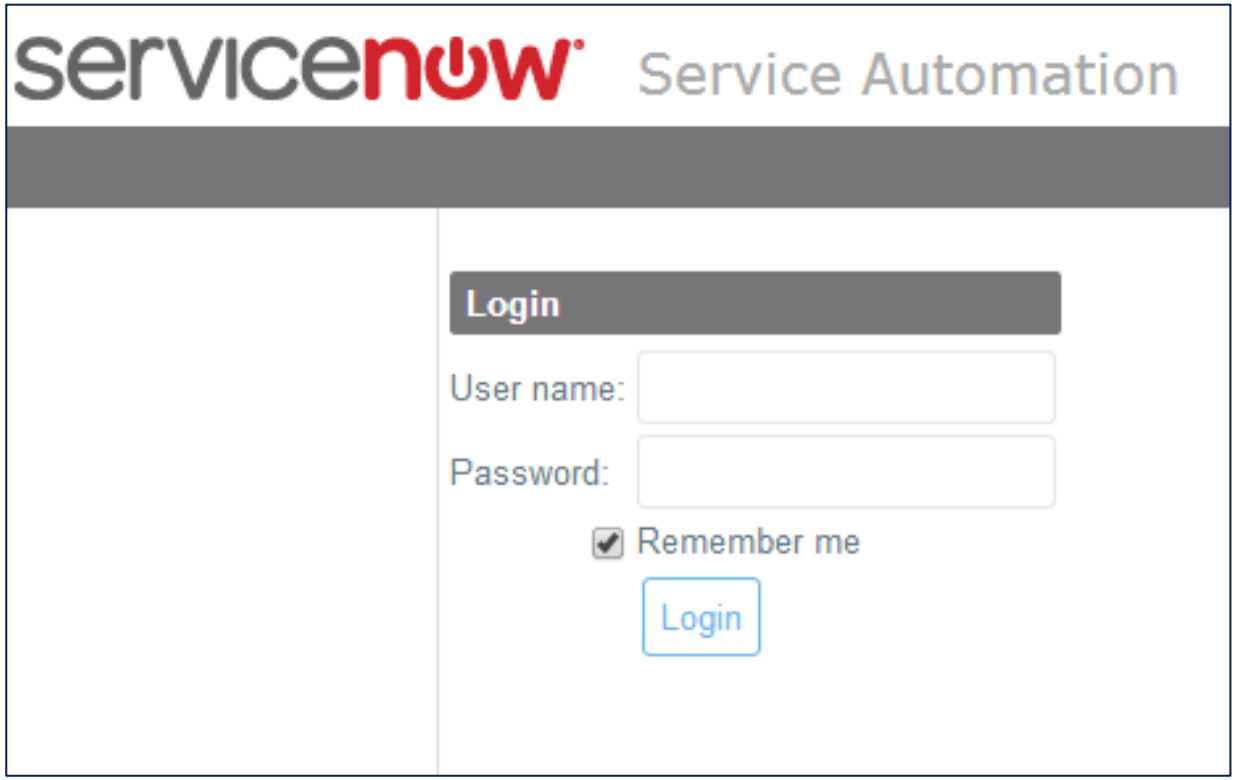
The Labs

Now you have to do some work!

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Lab Login

- Find your unique instance URL
  - You should have been given a piece of paper
  - https://<<name>>.lab.service-now.com
- Login to your instance:
  - admin/Knowledge14
  - Itil/Knowledge14
  - Employee/Knowledge14
- Reporting Lab Progress
  - Let us know at any time if you need help ☺



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Creating an Incident in ServiceNow

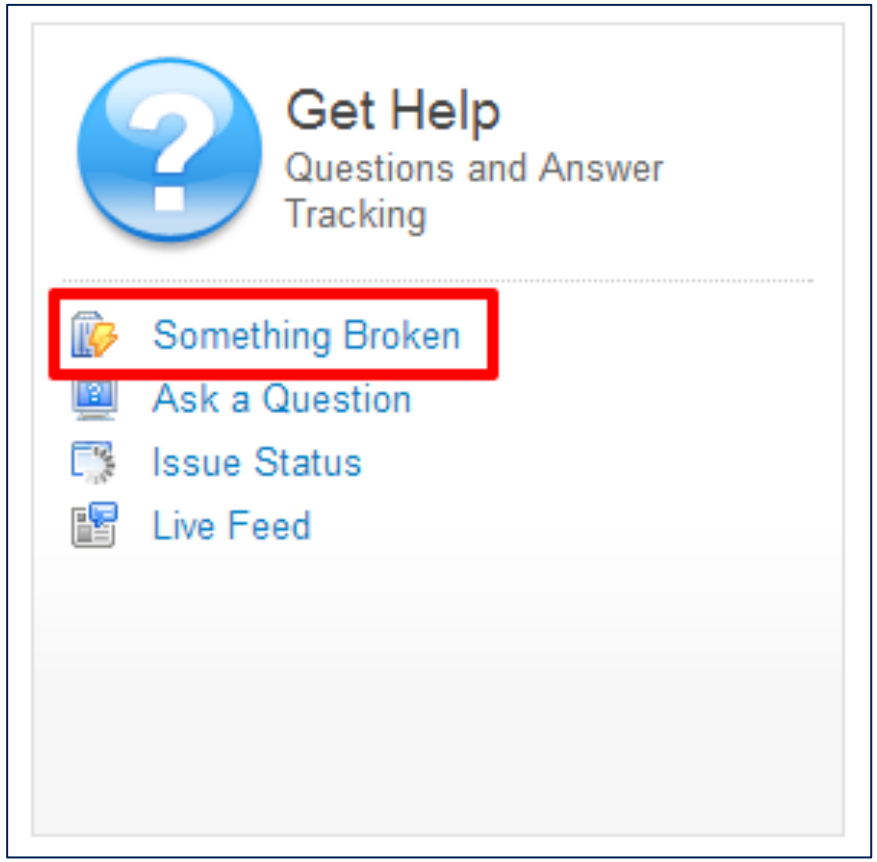
ServiceNow provides various methods for creating an incident

- Employee Self Service Portal
- Service Catalog
- New Call Application
- Incident Module

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Lab 1 – Create Incident (ESS)

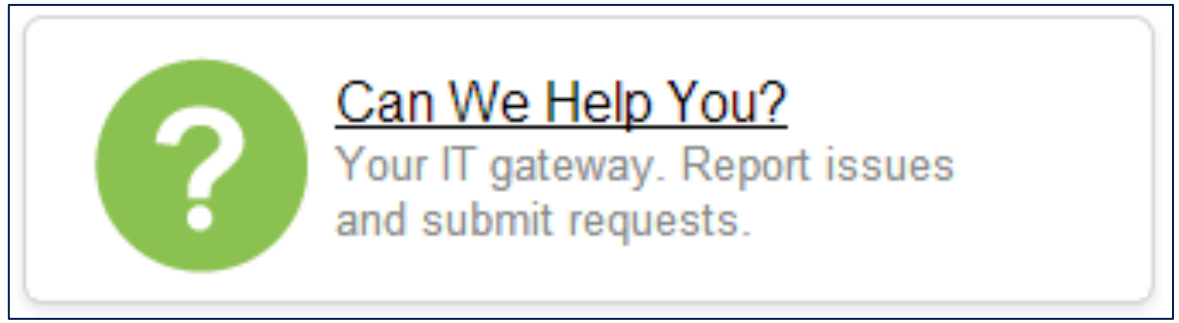
- Goal
  - Create an incident as an end user from the Employee Self Service (ESS) Portal
- Method
  - ESS Portal
- Steps
  - See Lab 1
  - Use employee/Knowledge14 credentials



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Lab 2 – Create Incident (Service Catalog)

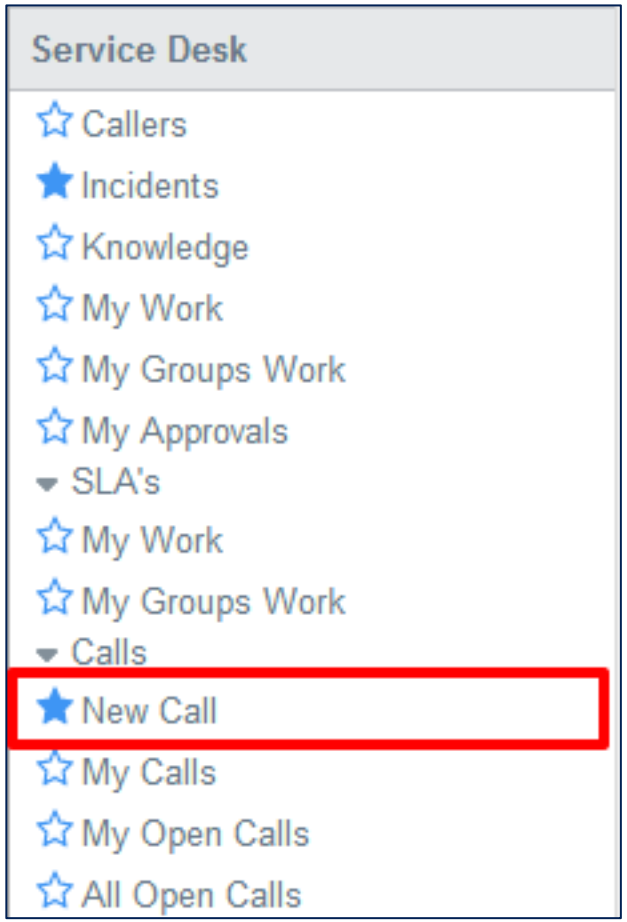
- Goal
  - Create an incident as an end user from the Service Catalog
- Method
  - Service Catalog
- Steps
  - See Lab 2
  - Use employee/Knowledge14 credentials



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Lab 3 – Create Incident (New Call)

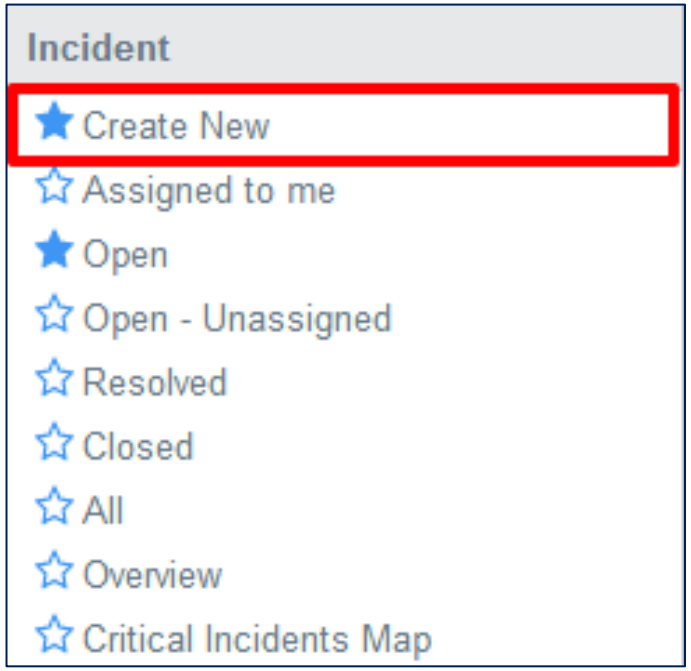
- Goal
  - Create an incident as an ITIL user from the New Call form
- Method
  - New Call form
- Steps
  - See Lab 3
  - Use itil/Knowledge14 credentials



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Lab 4 – Create Incident (Incident Module)

- Goal
  - Create an incident as an ITIL user from the Incident Module
- Method
  - Incident Module
- Steps
  - See Lab 4
  - Use itil/Knowledge14 credentials



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Creating an Incident in ServiceNow

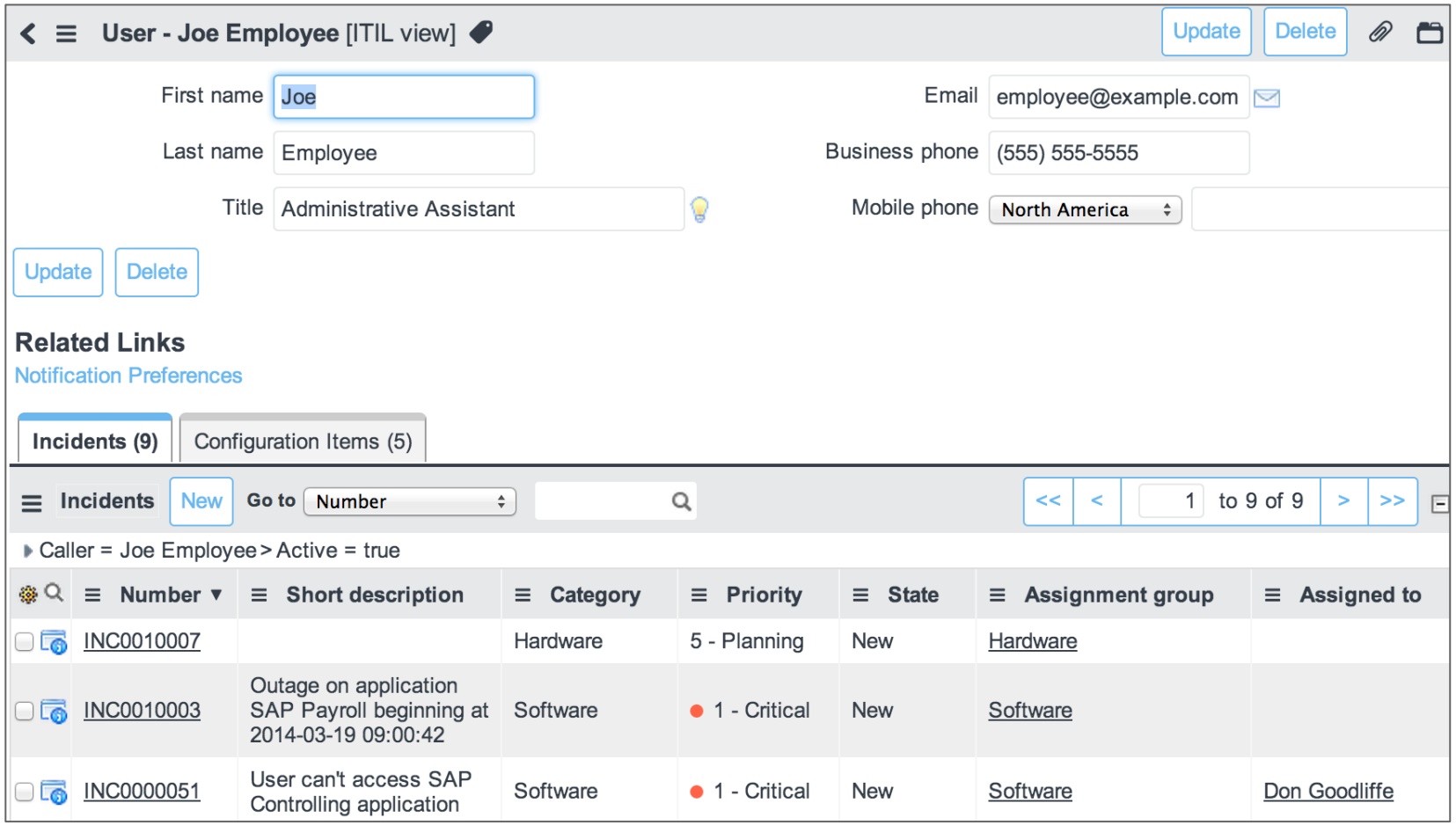
Additional methods for creating an incident

- Other ServiceNow applications
  - Because all of the applications share a single platform, incidents can be created from any other ServiceNow application with the click of a button.
- Chat
  - Using the built in chat functionality, users can create an incident from a chat window and capture all chat activity within the incident record.
- Email
  - Using Inbound Email rules, users can send an email to their ServiceNow instance to create or update and incident.
- Integrations
  - Incidents can also be created from third party applications.

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Integration Example – Screen Pops using CTI

- External CTI Client
- Formatted URL
- Displays related records
  - Incidents
  - Changes
  - Cis
  - Etc.



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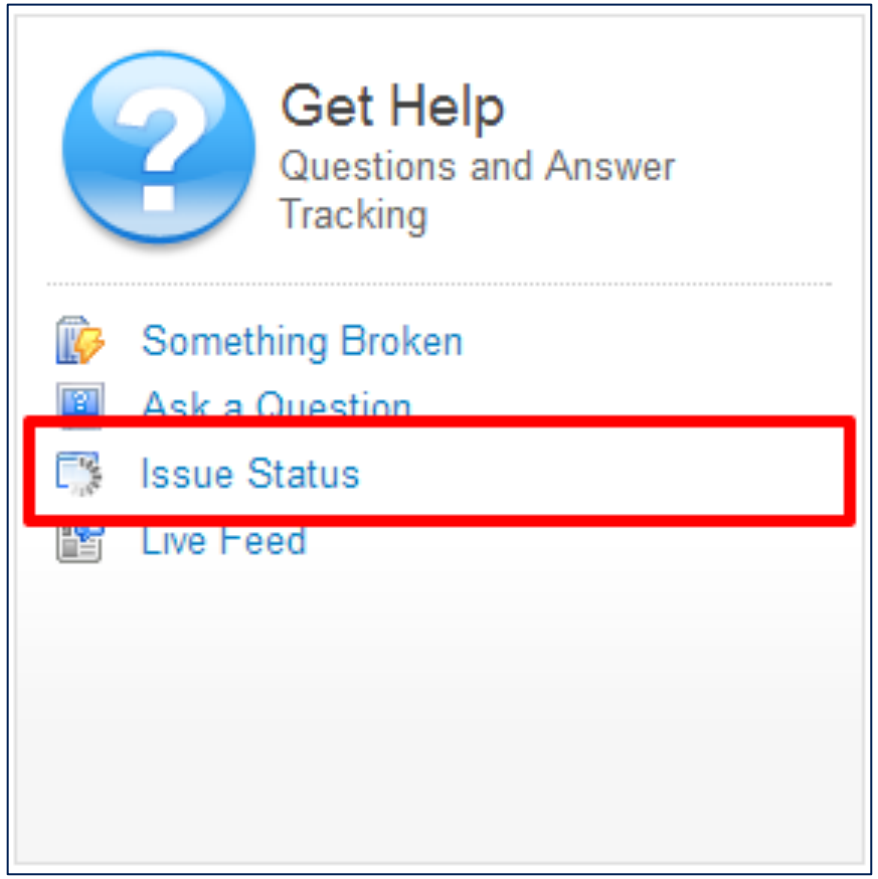
Lab 5 – Categorize and Assign

- Goal
  - Categorize and assign an existing incident
- Method
  - Incident Module
- Steps
  - See Lab 5
  - Use itil/Knowledge14 credentials

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Lab 6 – Investigate and Diagnose

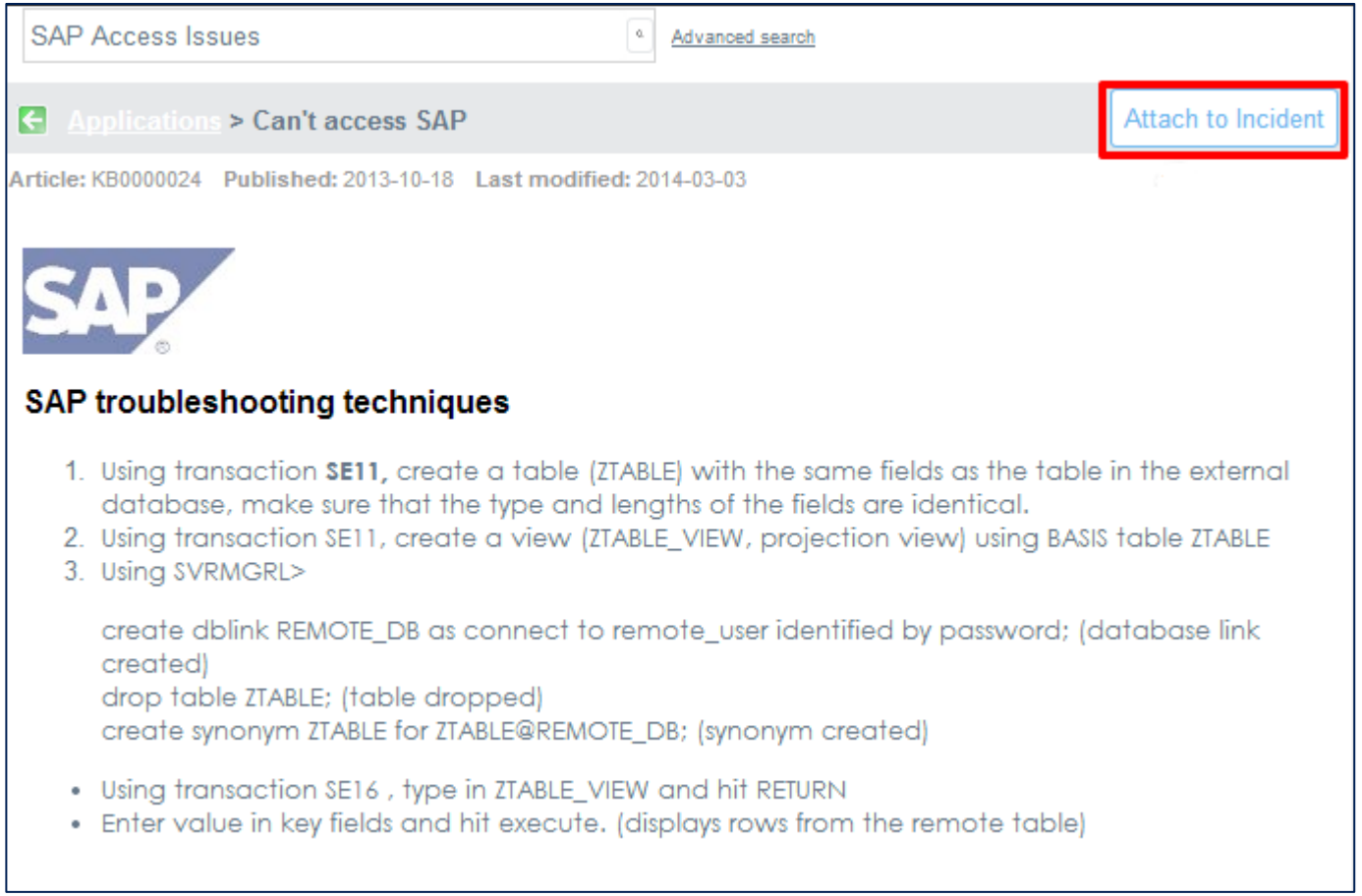
- Goal
  - Understand how the comments and work notes fields can be used to share information with the appropriate people.
- Method
  - Incident Module
- Steps
  - See Lab 6
  - Use itil/Knowledge14 credentials



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Lab 7 – Investigate and Diagnose (Knowledge)

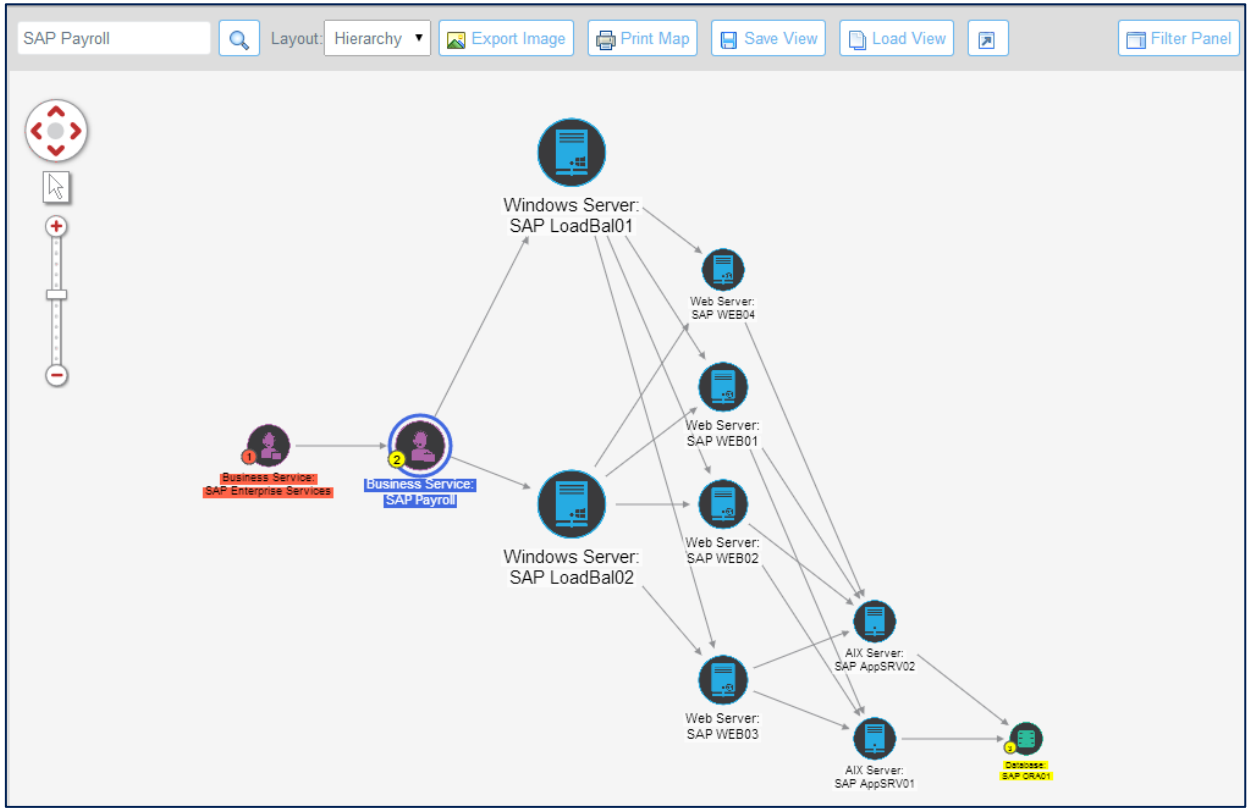
- Goal
  - Attach a Knowledge article to an Incident.
- Method
  - Incident Module
  - Knowledge Management
- Steps
  - See Lab 7
  - Use itil/Knowledge14 credentials



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Lab 8 – Investigate and Diagnose (BSM)

- Goal
  - Use the BSM Map to select the Configuration Item
- Method
  - Incident Module
  - BSM Map
- Steps
  - See Lab 8
  - Use itil/Knowledge14 credentials



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Lab 9 – Related Records

- Goal
  - Create a change requests from an Incident, and see how the records are automatically related.
- Method
  - Incident Module
  - Change Module
- Steps
  - See Lab 9
  - Use itil/Knowledge14 credentials

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Lab 10 – Resolve an Incident

- Goal
  - Learn how to resolve an incident
- Method
  - Incident Module
- Steps
  - See Lab 10
  - Use itil/Knowledge14 credentials

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Lab 11 – Configure Incident Form (Existing)

- Goal
  - Add an existing field to the incident form.
- Method
  - Incident Module
- Steps
  - See Lab 11
  - Use admin/Knowledge14 credentials

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Lab 12 – Configure Incident Form (New)

- Goal
  - Add a brand new dropdown field to the form and add choice values.
- Method
  - Incident Module
- Steps
  - See Lab 12
  - Use admin/Knowledge14 credentials

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Lab 13 – Configure Incident Form (UI Policy)

- Goal
  - Create a UI Policy to only display the Environment field if the Category is Software.
- Method
  - Incident Module
- Steps
  - See Lab 13
  - Use admin/Knowledge14 credentials

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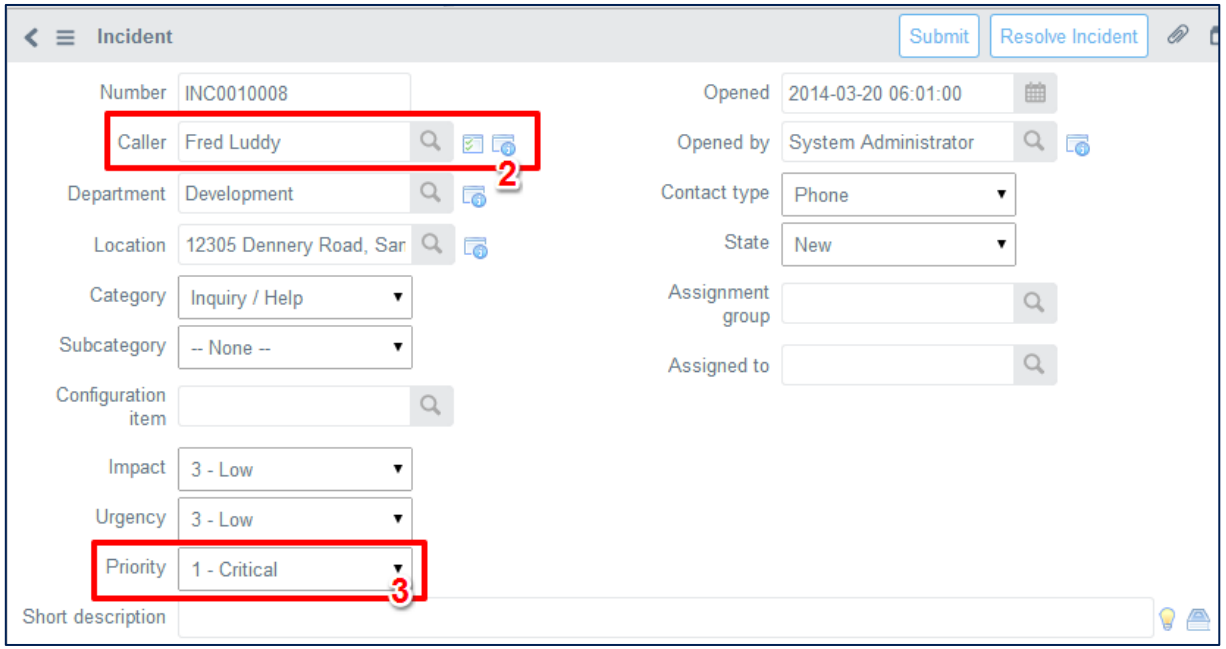
Lab 14 – Incident Automation (ESS)

- Goal
  - Automatically assign hardware incidents opened in the Employee Self Service Portal to the Hardware group.
- Method
  - Incident Module
  - ESS Portal
- Steps
  - See Lab 14
  - Use admin/Knowledge14 credentials

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Lab 15 – Incident Automation (VIP)

- Goal
  - The Service Desk wants to make sure that any incidents opened by Fred Luddy are high priority.
- Method
  - Incident Module
- Steps
  - See Lab 15
  - Use admin/Knowledge14 credentials



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Lab 16 – Incident Automation (Client Script)

- Goal
  - Create a client script that sets the Assignment Group based on the CI support group.
- Method
  - Incident Module
  - Client Scripts
- Steps
  - See Lab 16
  - Use admin/Knowledge14 credentials

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Top Takeaways

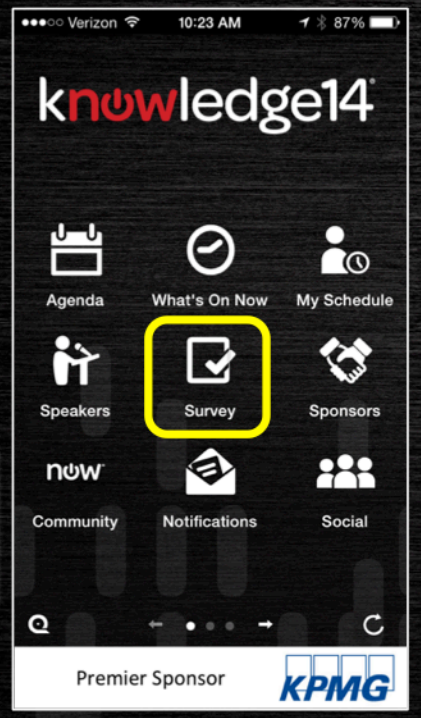
1. ServiceNow includes many methods to create incidents.

2. Incidents can be escalated or linked to other types of tasks.

3. The Incident process can be configured to follow your company's process.

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