knowledge15®
April 19–24, 2015 • Mandalay Bay • Las Vegas, NV

Lab Guide

Incident 101:

From Creation to Resolution

Michael Ritchie & Chris McGrath

Login / Passwords:

admin / Knowledge15

itil / Knowledge15

employee / Knowledge15

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Lab Goal

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

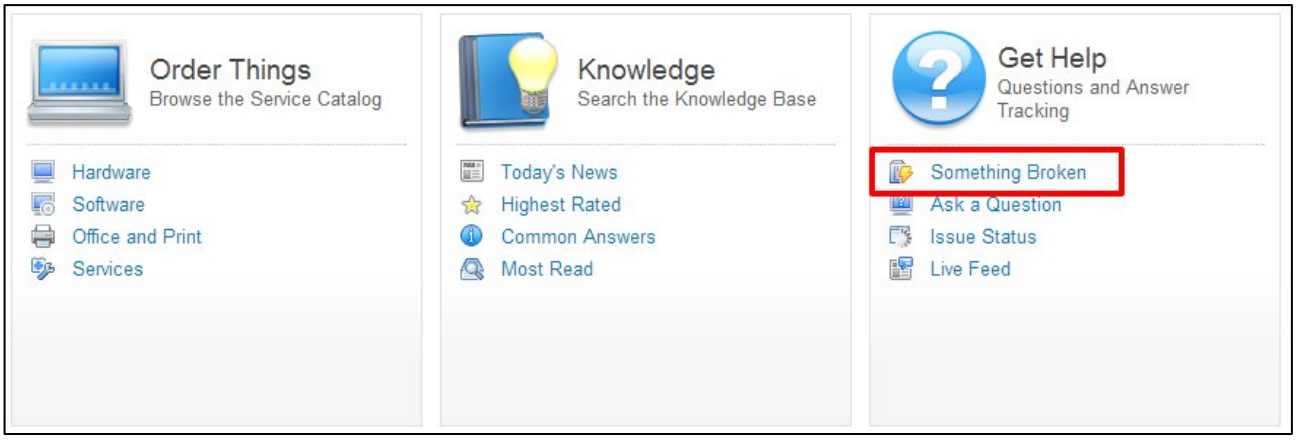
Lab 1.1 Create Incident

Create an Incident from the Self-service Portal

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

2. Log on with **employee/Knowledge15** credentials.

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



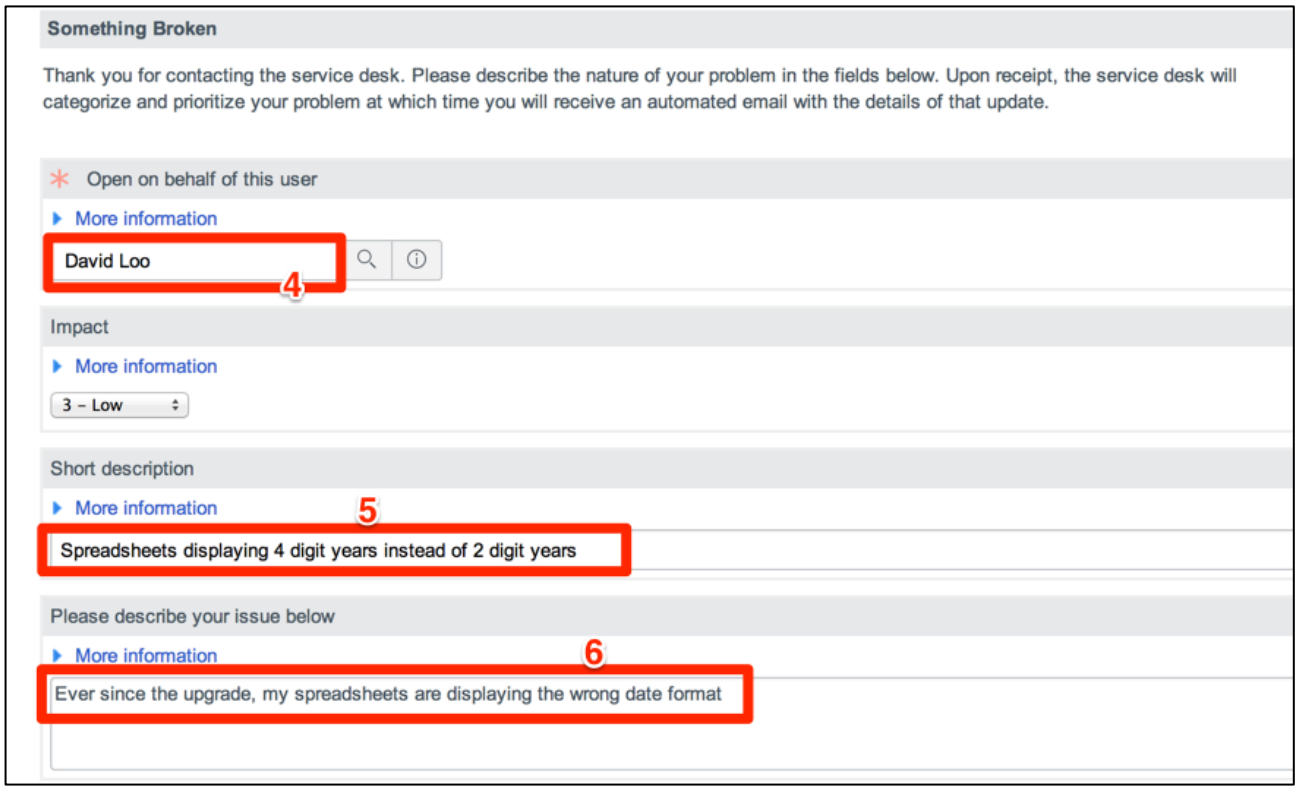
Note: The **Open on behalf of this user** is defaulted to the logged in user, but can be changed to a different user.

4. Set the Open on behalf of this user field to **David Loo**.

5. Set the Short Description to **Spreadsheets displaying 4 digit years instead of 2 digit years**.

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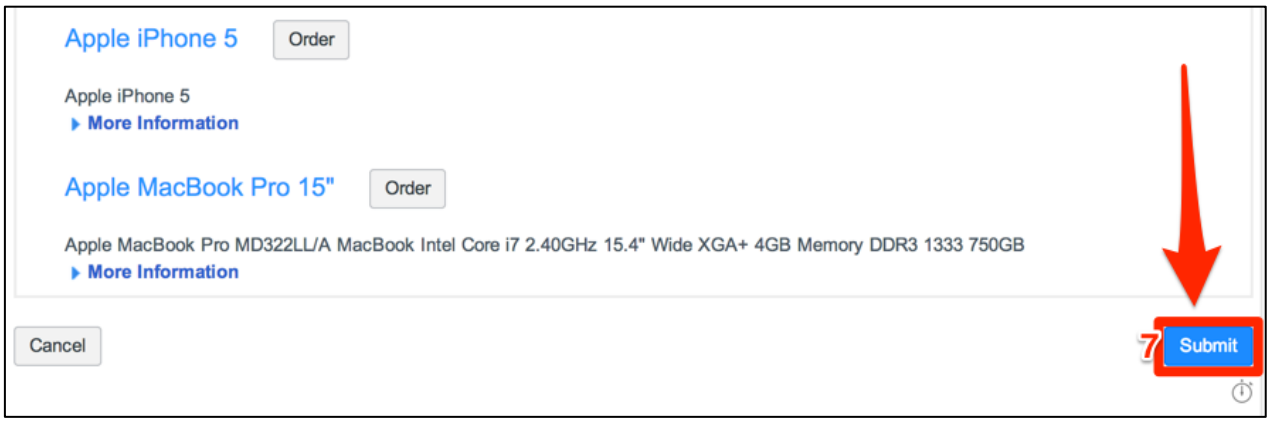
6. Type the following into the field labeled Please describe your issue below:
   Ever since the upgrade, my spreadsheets are displaying the wrong date format.



Note: Knowledge Base results display automatically at the bottom of the form based on the Short Description that the user enters. This can help to deflect incidents by enabling the end user to potentially solve their own issue.

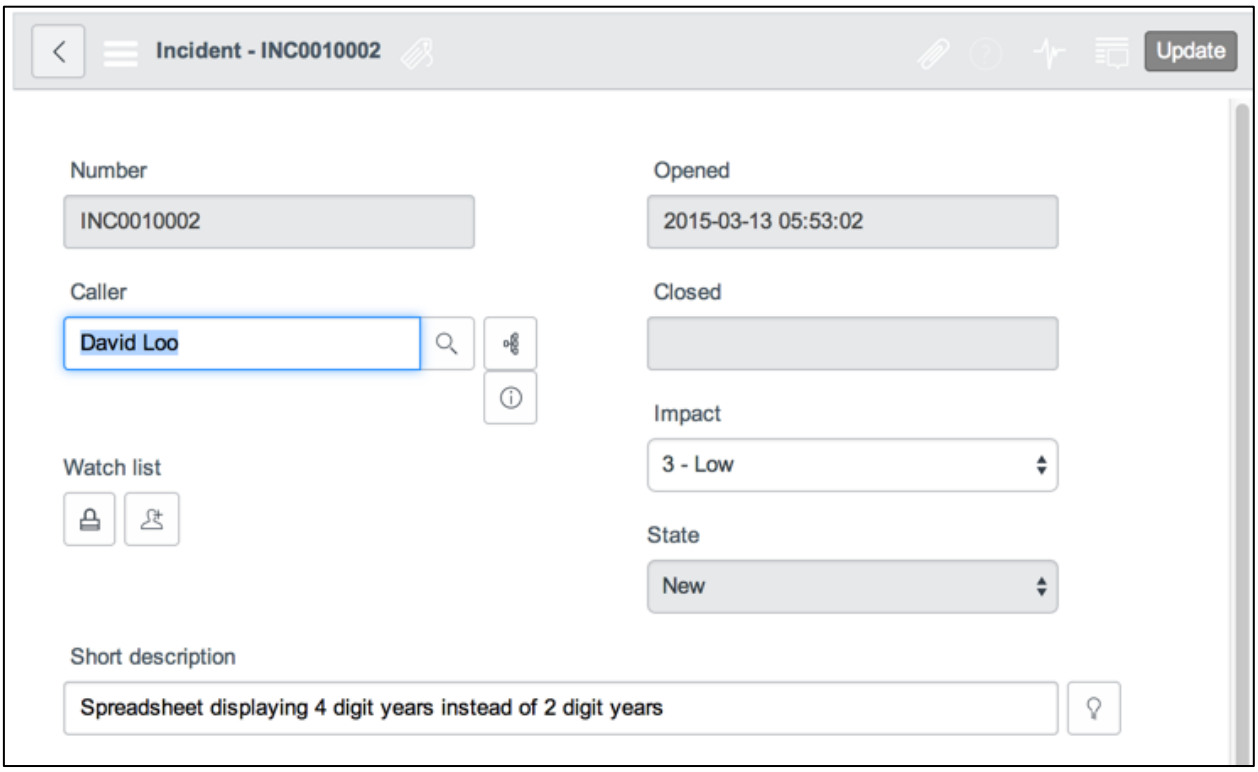
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7. Scroll to the bottom of the form, and click **Submit**.



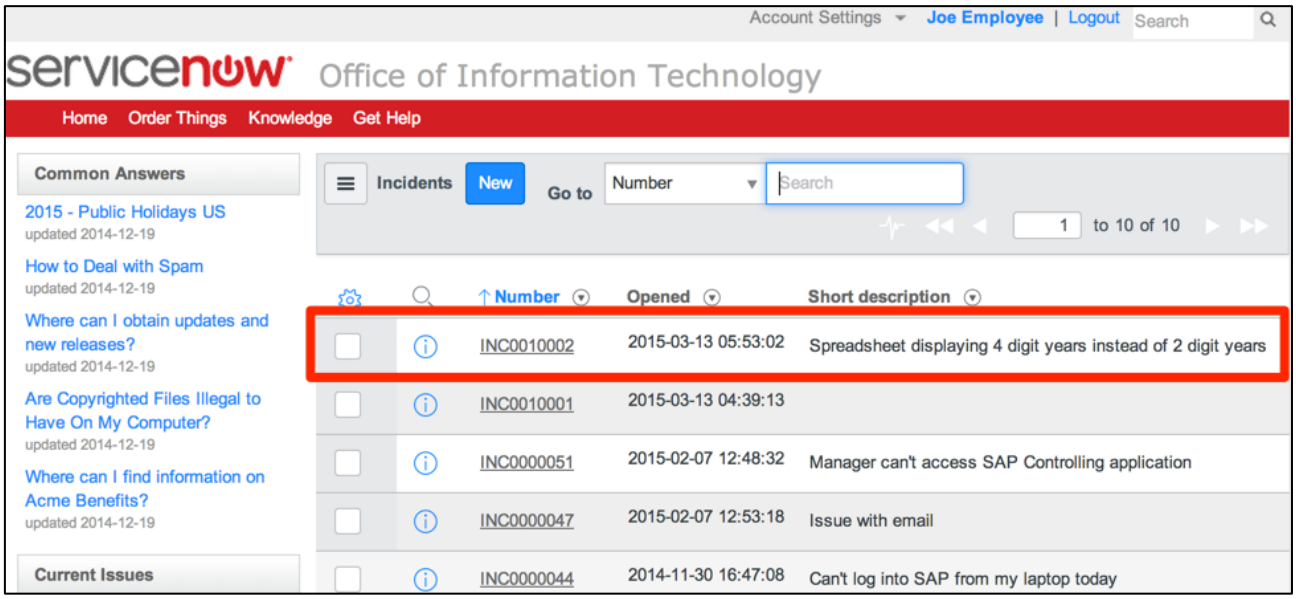
Lab Success Verification

The screen should look like the example.



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1. Click **Get Help** on the top menu bar then click **Status.** Confirm that the incident was created.



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

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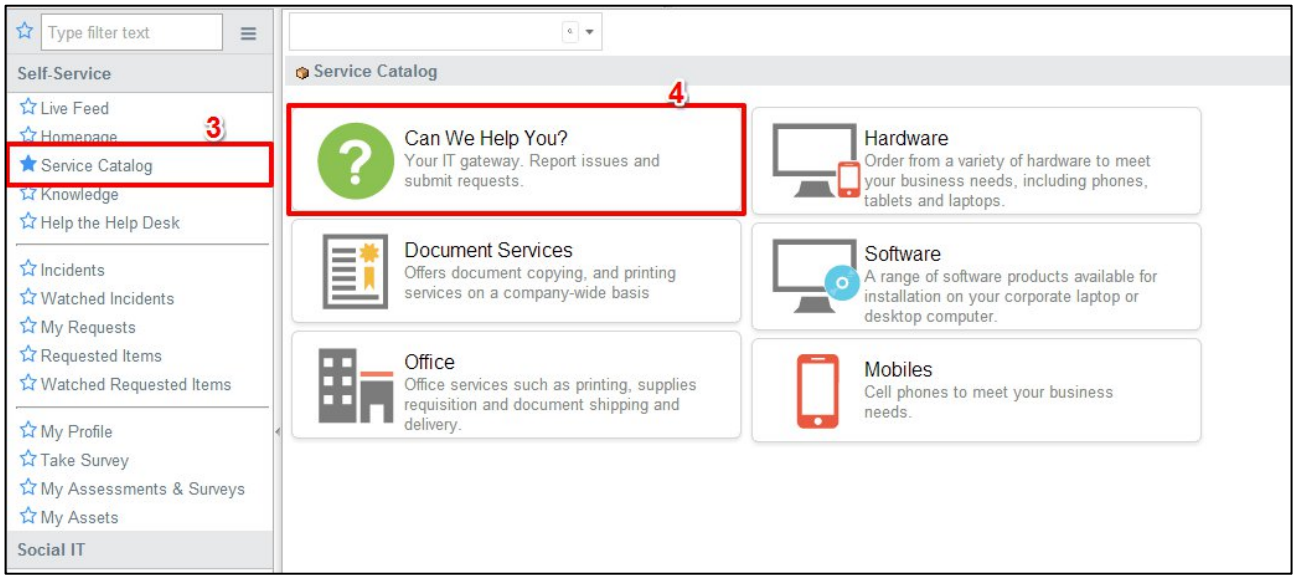
Lab Goal

This lab explains how to create an incident as an end user from the Service Catalog.

Lab 1.2 Create Incident

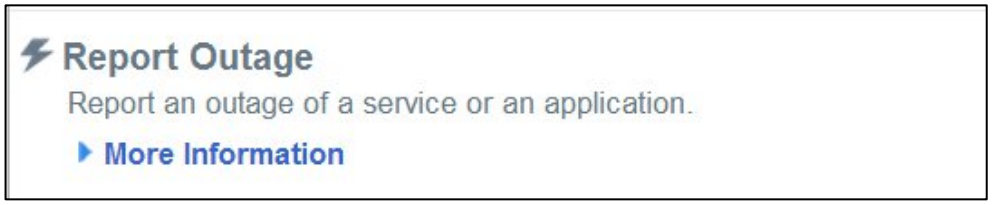
Create an Incident from the Service Catalog

1. Navigate to your training instance: **https://<<name>>.lab.service-now.com**
2. Log on with **employee/Knowledge15** credentials.
3. On the left navigation bar, under **Self-Service**, click **Service Catalog**.
   Note: In subsequent labs, these steps are abbreviated to **Application Name** > **Module Name.**
4. In the Service Catalog window, click **Can We Help You.**



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

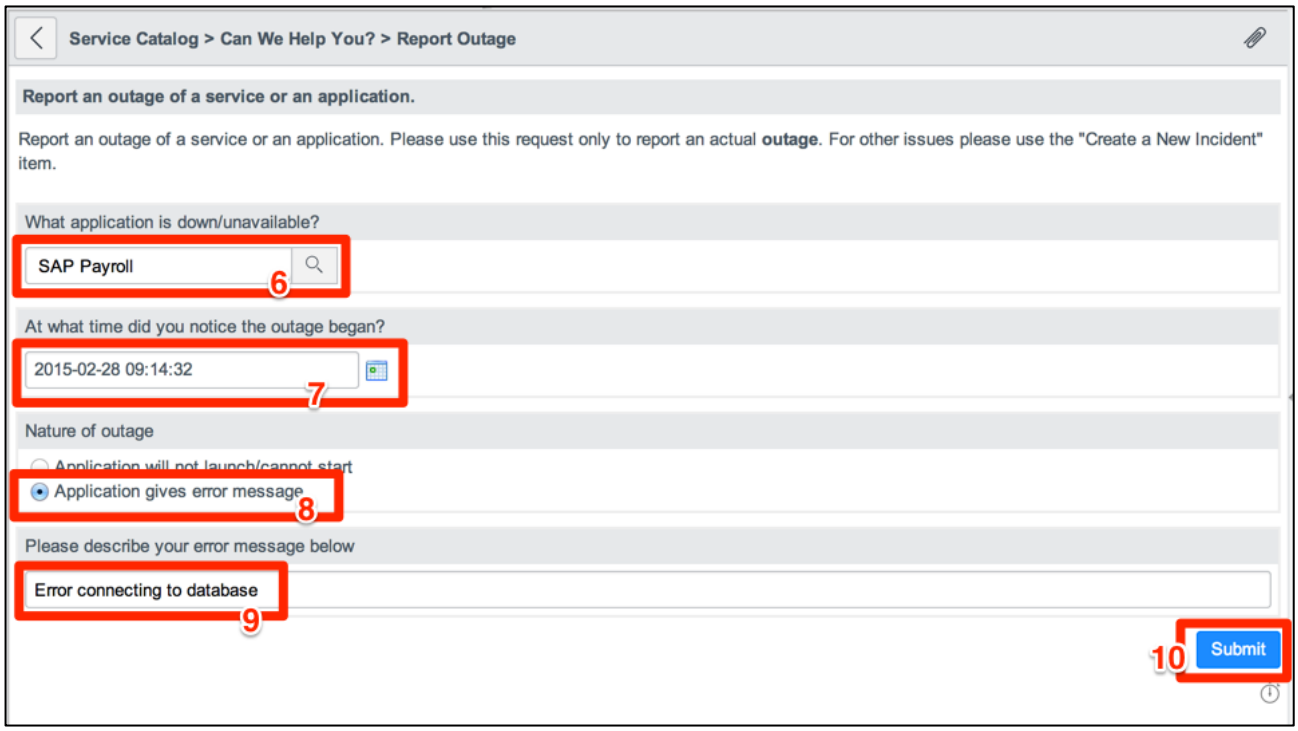


6. Select **SAP Payroll** as your Application
   Note: This field supports type-ahead, which is not case sensitive.

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 displays an extra field based on your selection.

9. Add the following error message to the error message field: **Error connecting to database.**

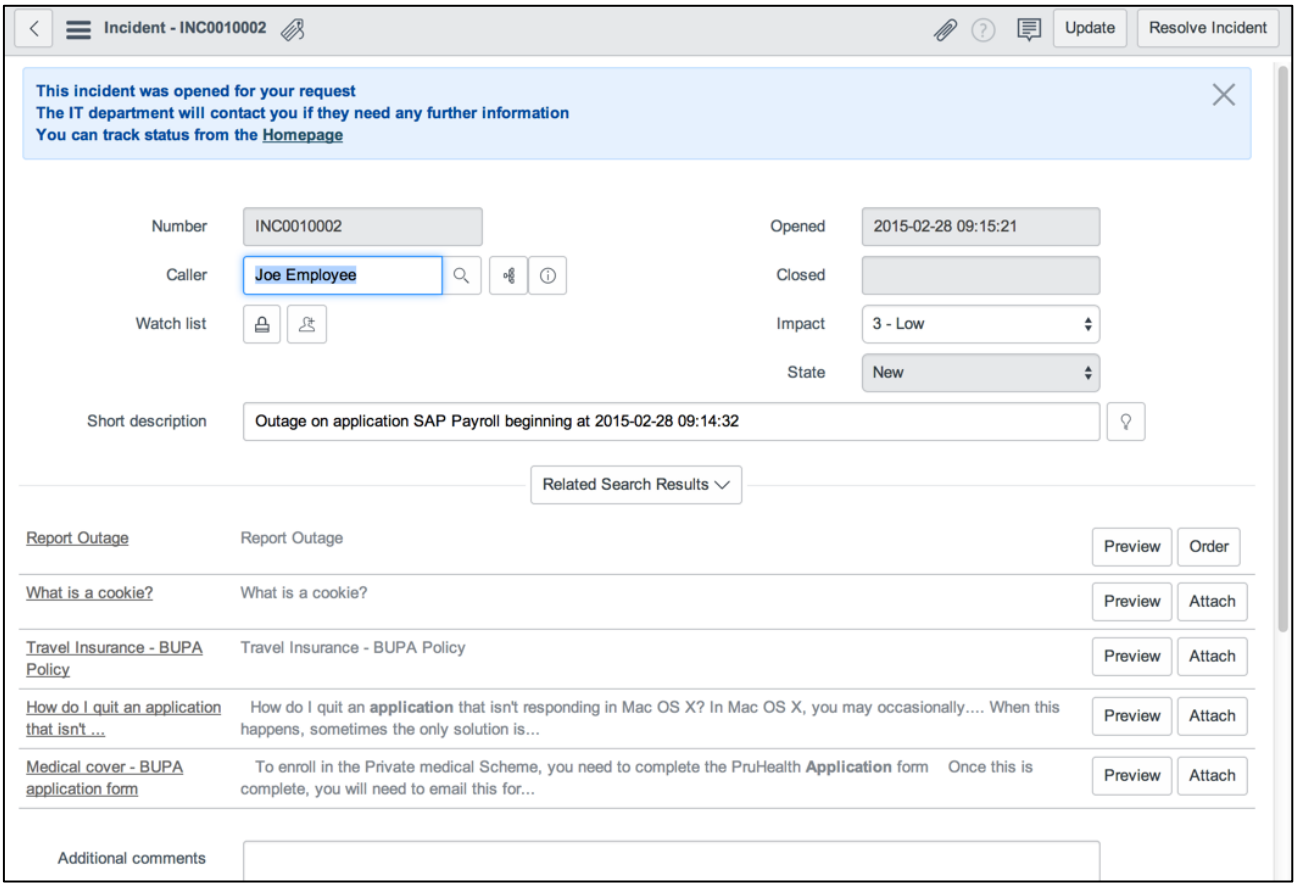


10. Click **Submit.**

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Lab Success Verification

The screen should look like the example.



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

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Lab Goal

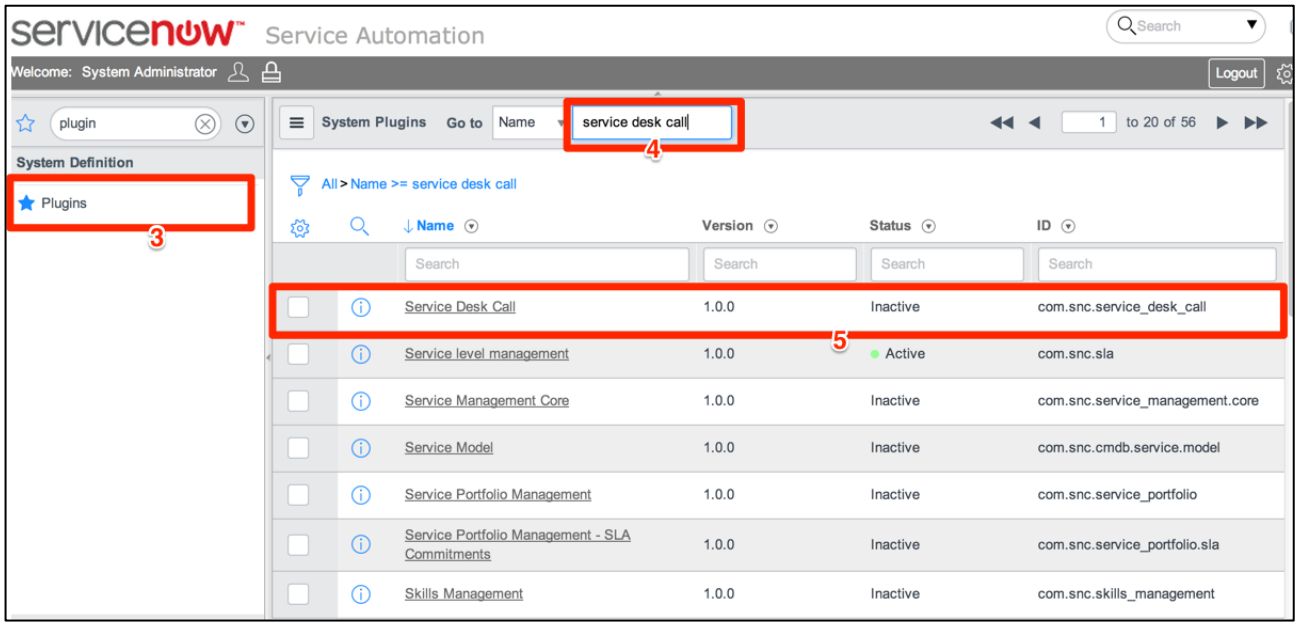
This lab explains how to create an incident as an ITIL user from the New Call form.

Lab 1.3 Create Incident

Install the Service Desk Call Plugin

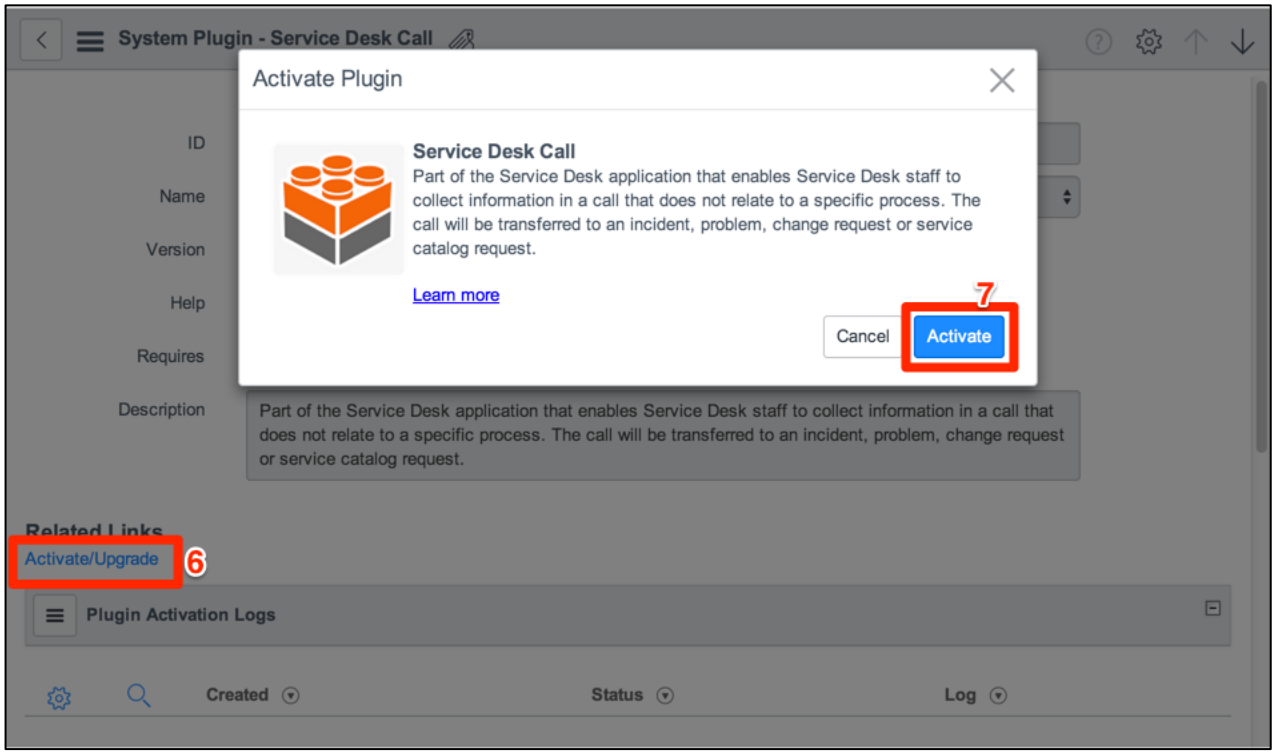
The New Call wizard is an application that is not enabled by default in a new customer instance. This is done via a plugin. Follow these steps to install the plugin.

1. Navigate to your training instance: **https://<<name>>.lab.service-now.com**
2. Log on with **admin/Knowledge15** credentials.
3. Navigate to **System Definition > Plugins**.
4. Search for **Service Desk Call**.
5. Select the **Service Desk Call** plugin.



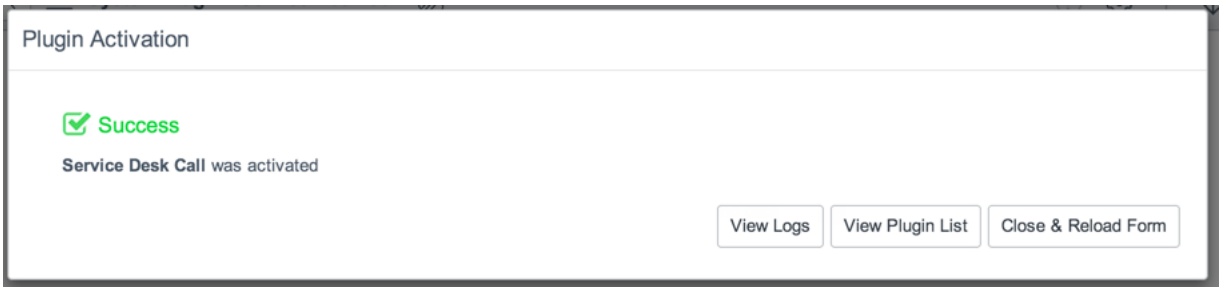
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6. Click the Related Link at the bottom of the screen to **Activate/Upgrade** the plugin.



7. A dialog box pops up to describe the plugin. Click **Activate**.

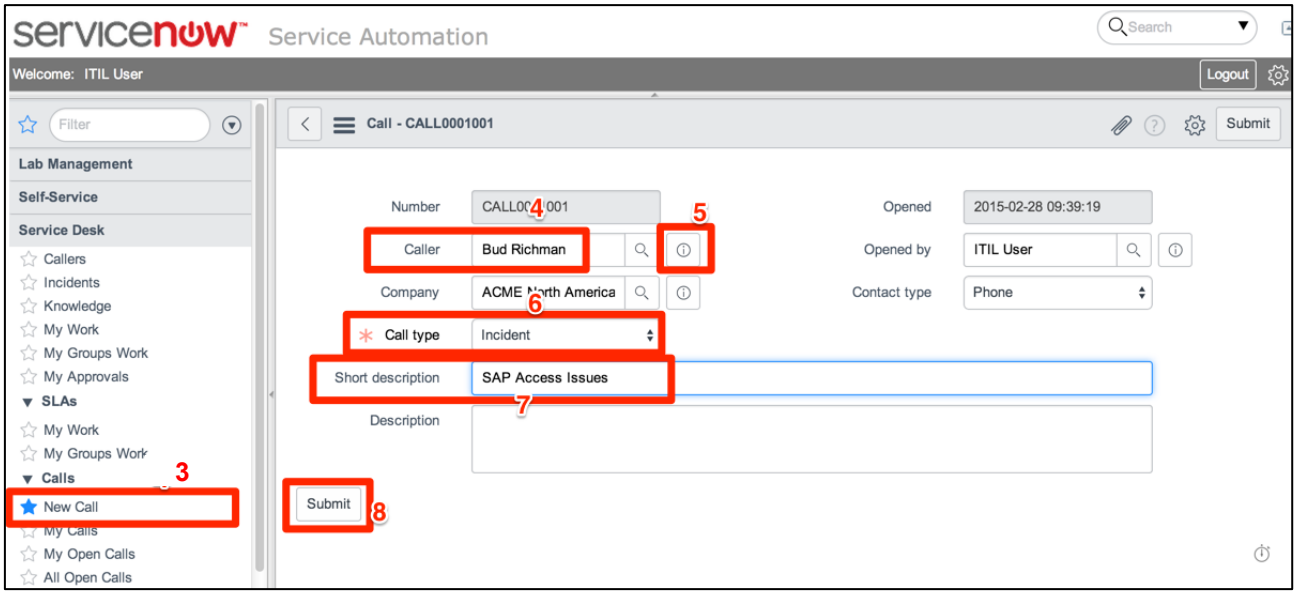
8. The activation process can take from a few to 10-15 minutes to complete. After the plugin completes, the following message should appear.



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Create an Incident from the New Call Form

1. Navigate to your training instance: **https://<<name>>.lab.service-now.com**
2. Log on with **itil/Knowledge15** credentials.
3. Navigate to **Service Desk > New Call**.
4. Set the Caller to **Bud Richman.**
   Note: When the 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 the Call Type to **Incident.**
7. Add the following Short Description: **SAP Access issues**.

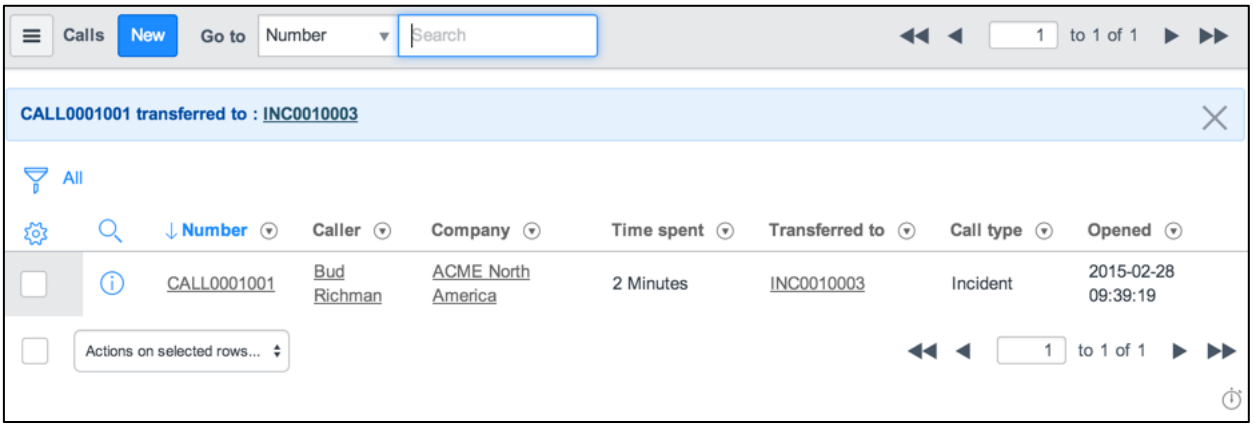


8. Click **Submit**.

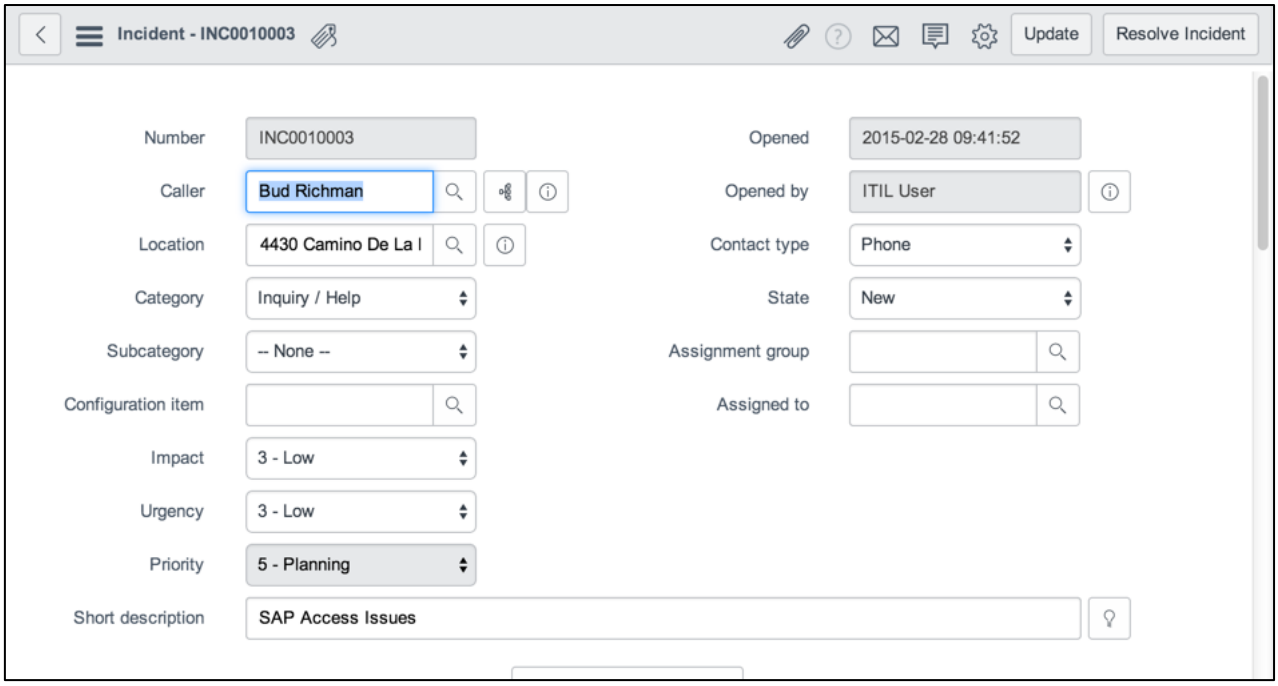
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Lab Success Verification

The screen should look like the example.



1. Click on the Incident number to bring up the new incident.



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

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Lab Goal

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

Lab 1.4 Create Incident

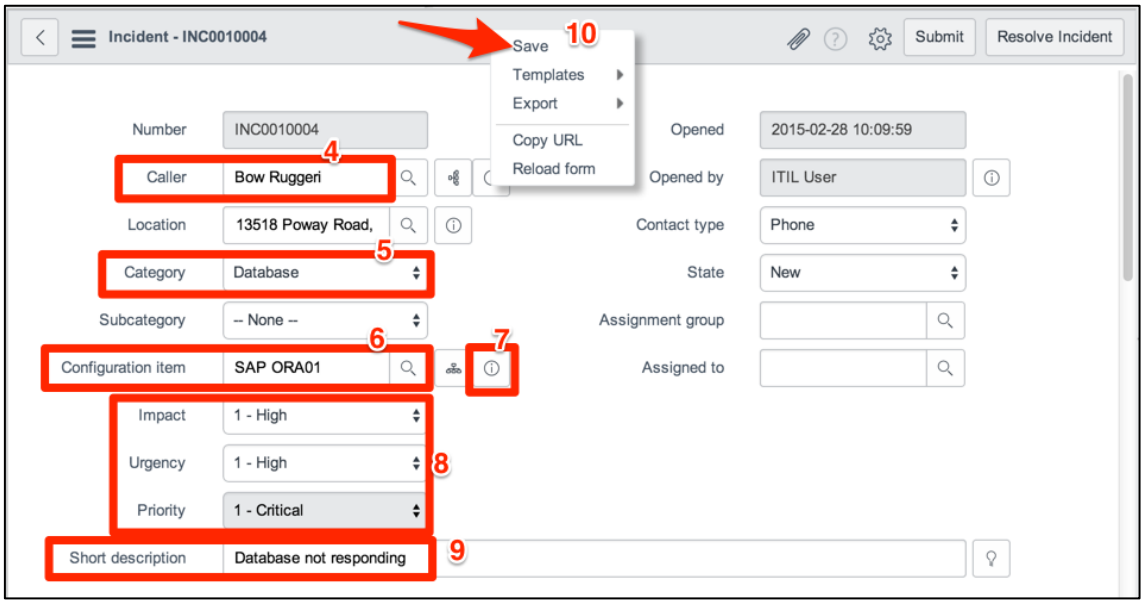
Create an Incident from the Incident Module

1. Navigate to your training instance: **https://<<name>>.lab.service-now.com**
2. Log on with **itil/Knowledge15** credentials.
3. Navigate to **Incident > Create New**.
4. Set the Caller field to **Bow Ruggeri**.
   Note: When the Caller is selected, the Location field automatically populates.
5. Set the Category to **Database**.
6. Set the 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 the Impact to **1 – High** and the Urgency to **1 – High**.
   Note: The Priority is automatically calculated based on Impact and Urgency.
9. Add the following Short Description: **Database not responding.**

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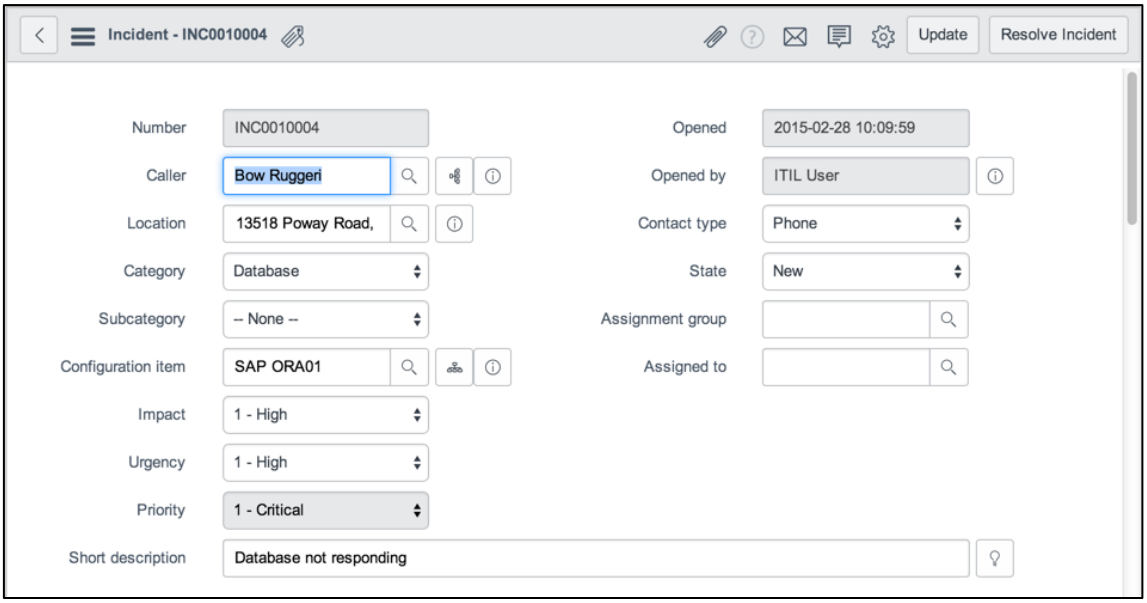
10. Right-click the header bar of the form and click **Save**.

Note: You can also access the **right-click** menu by clicking the  icon at the top of the form.



Lab Success Verification

The screen should look like the example.



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

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Challenge: List 3 other ways to create an incident

1.
2.
3.

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Lab Goal

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

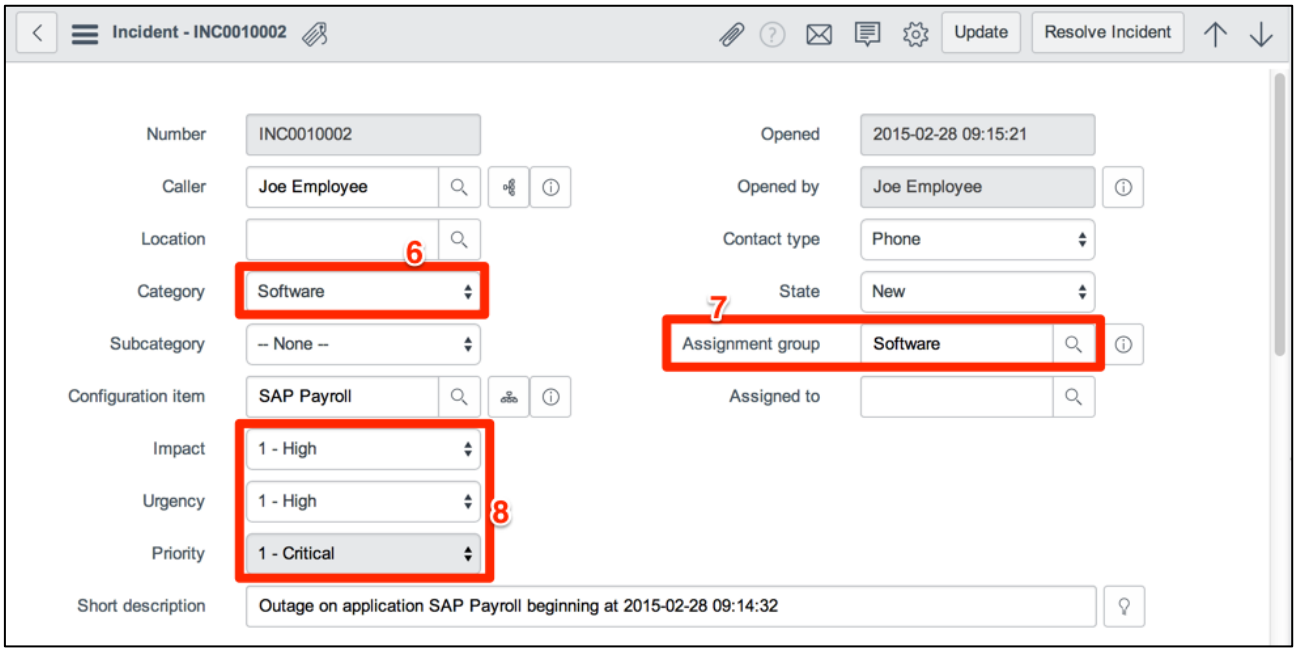
Lab 2.1 Categorize and Assign

Categorize and Assign the Incident

1. Navigate to your training instance: **https://<<name>>.lab.service-now.com**
2. Log on with **itil/Knowledge15** credentials.
3. Navigate to **Incident > Open,** and open the incident you created (the caller is **Joe Employee).**
4. Change the Category to **Hardware.**
5. Change the Subcategory to **CPU.**
6. Change the Category to **Software.**
   Note: When **Software** is selected as the Category, the choices for Subcategory change.
   Note: What is the Assignment Group set to?
7. Change the Assignment Group to **Software**.

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

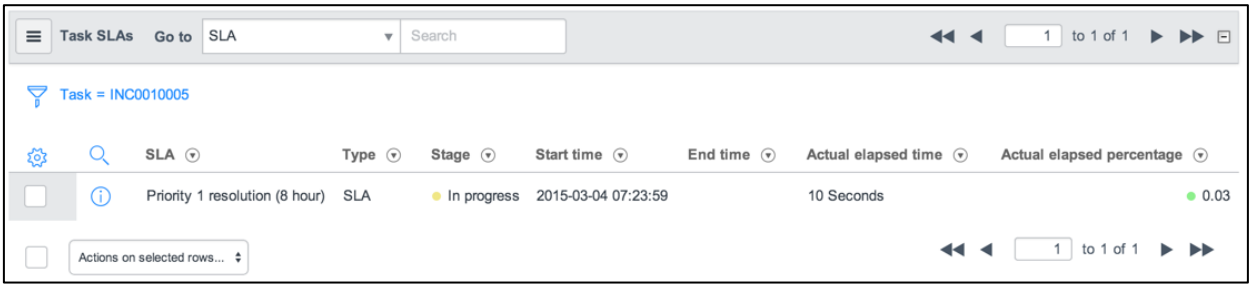


9. Click the ☰ icon at the top of the form and click **Save.**

10. Scroll to the bottom of the form and view the **Task SLAs** related list.

Lab Success Verification

The screen should look like the example.



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

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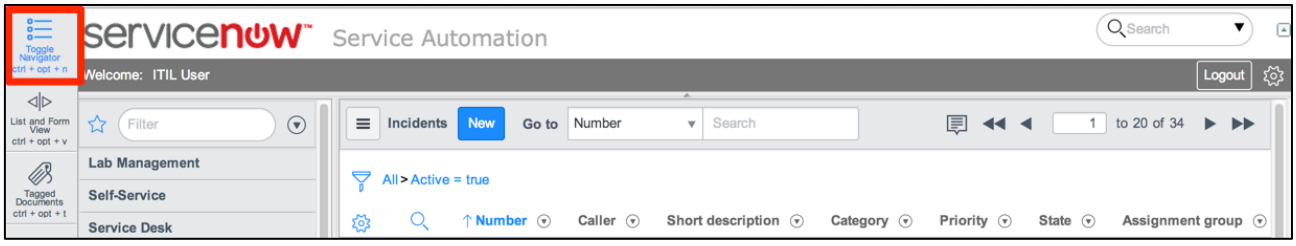
Lab Goal

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

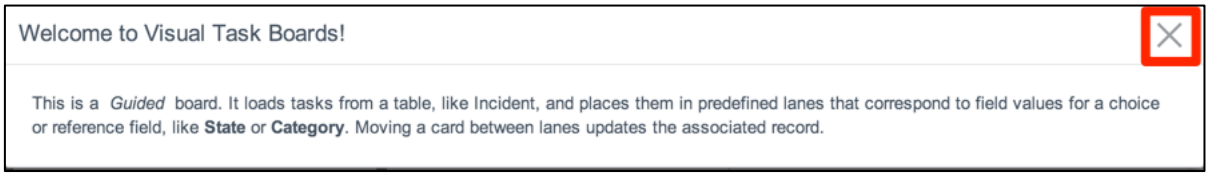
Lab 2.2
Categorize and Assign

Categorize and Assign the incident

1. Navigate to your training instance: **https://<<name>>.lab.service-now.com**
2. Log on with **itil/Knowledge15** credentials.
3. Navigate to **Incident > Open**.
4. In the list header, click on the icon next to Category and select **Show Visual Task Board.**
5. Click the **Toggle Navigator** icon in the top left of the screen to make the Visual Task Board full screen.

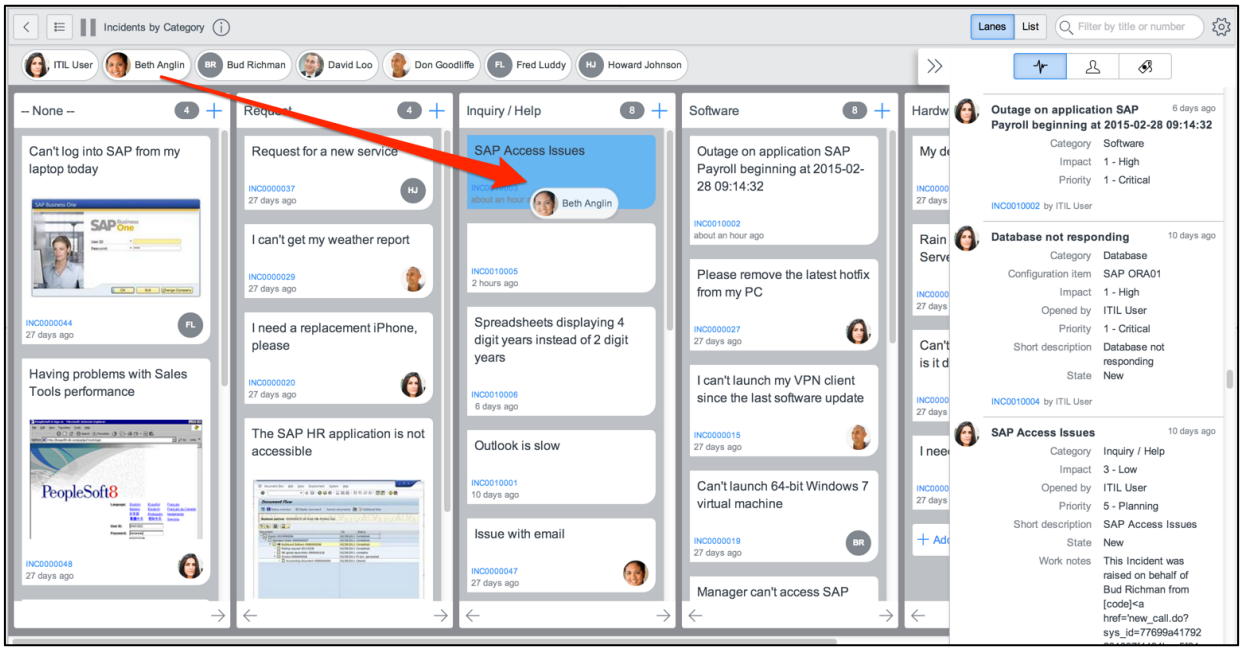


6. Click the **X** to close out the welcome message.



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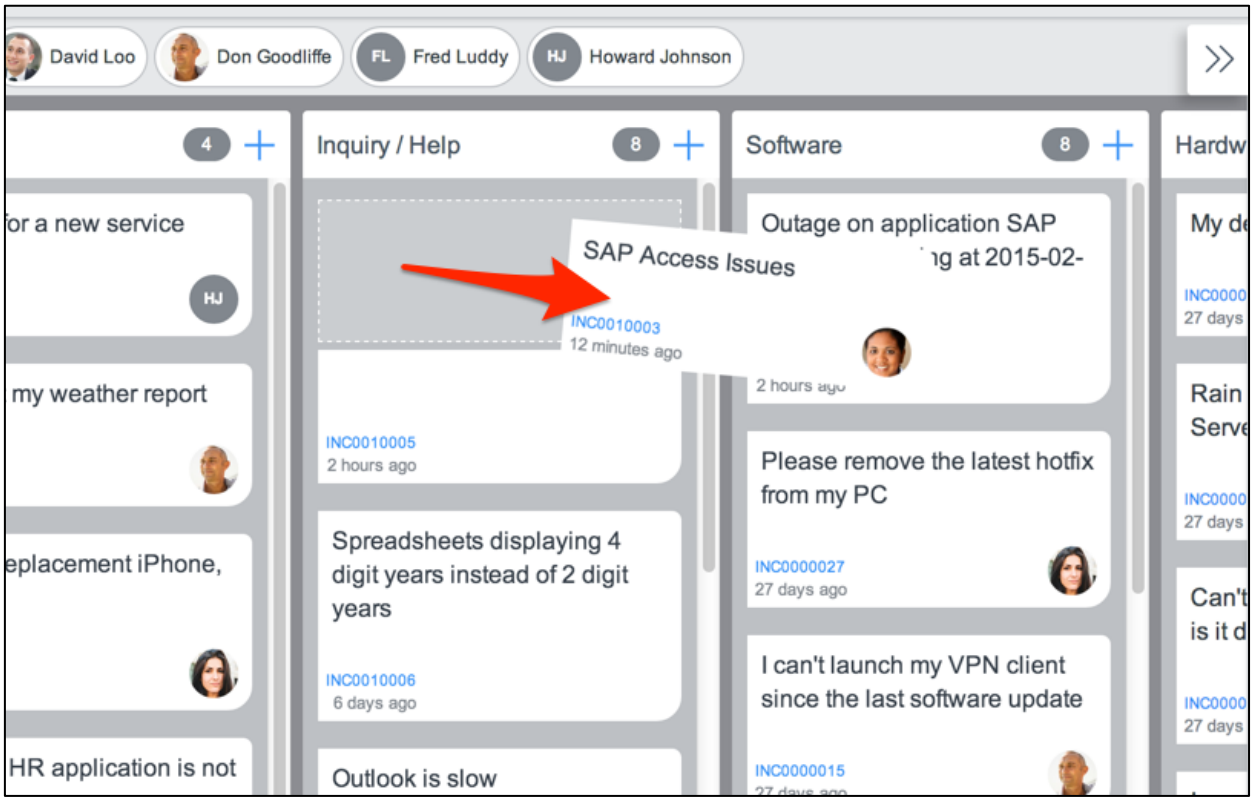
7. Click the icon for **Beth Anglin** at the top of the page and drag it over the card that says **SAP Access Issues**.



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.

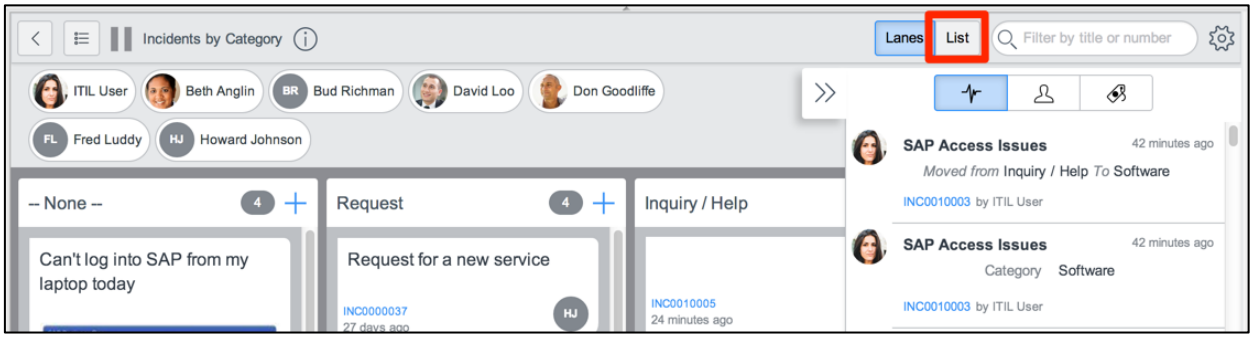
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8. Click the card for **SAP Access Issues** and drag it from the **Inquiry/Help** column into the **Software** column.



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.

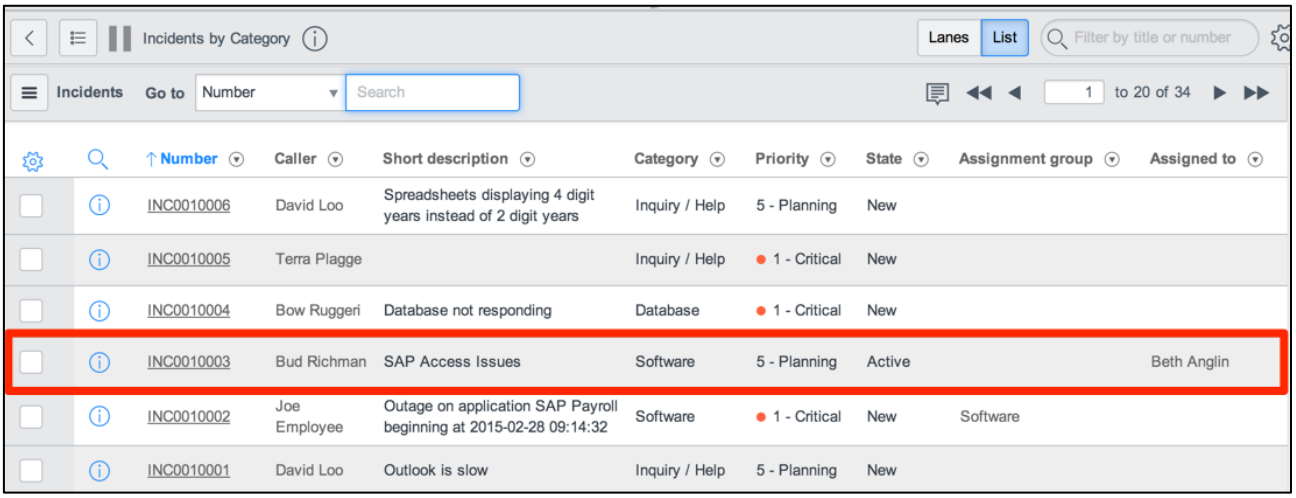
9. Click the **List** icon to return to the list view**.**



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Lab Success Verification

The screen should look like the example.



Number	Caller	Short description	Category	Priority	State	Assignment group	Assigned to
INC0010006	David Loo	Spreadsheets displaying 4 digit years instead of 2 digit years	Inquiry / Help	5 - Planning	New		
INC0010005	Terra Plagge		Inquiry / Help	1 - Critical	New		
INC0010004	Bow Ruggeri	Database not responding	Database	1 - Critical	New		
INC0010003	Bud Richman	SAP Access Issues	Software	5 - Planning	Active		Beth Anglin
INC0010002	Joe Employee	Outage on application SAP Payroll beginning at 2015-02-28 09:14:32	Software	1 - Critical	New	Software	
INC0010001	David Loo	Outlook is slow	Inquiry / Help	5 - Planning	New		

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

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Lab Goal

This lab explains how the Comments and Work Notes fields can be used to share information with the appropriate people.

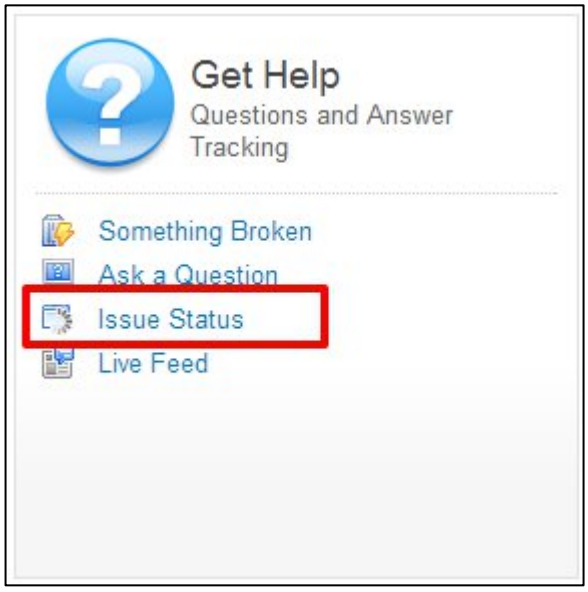
Lab 3.1 Investigate and Diagnose

Using Comments and Work Notes

1. Navigate to your training instance: **https://<<name>>.lab.service-now.com**
2. Log on with **itil/Knowledge15** credentials.
3. Navigate to **Incident > Open,** and open the incident you created (the caller is **Joe Employee)**.
4. Under the Notes Section, add the following text to the Additional Comments field: **Are you logged in to the VPN when you try to access SAP?**
5. Add the following text to the Work Notes field: **Checking to make sure this is not a networking issue.**
6. Click the  icon at the top of the form and click **Save.**
   Note: Clicking save triggers a notification to the caller informing them that their incident has been commented. The caller can either reply to the email, or log in to the instance.
7. Using a different browser, navigate to the **Employee Self-Service** portal in your training instance: **https://<<name>>.lab.service-now.com/ess**
8. Log on with **employee/Knowledge15** credentials.

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



10. Select the incident you created (the caller is **Joe Employee).**

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

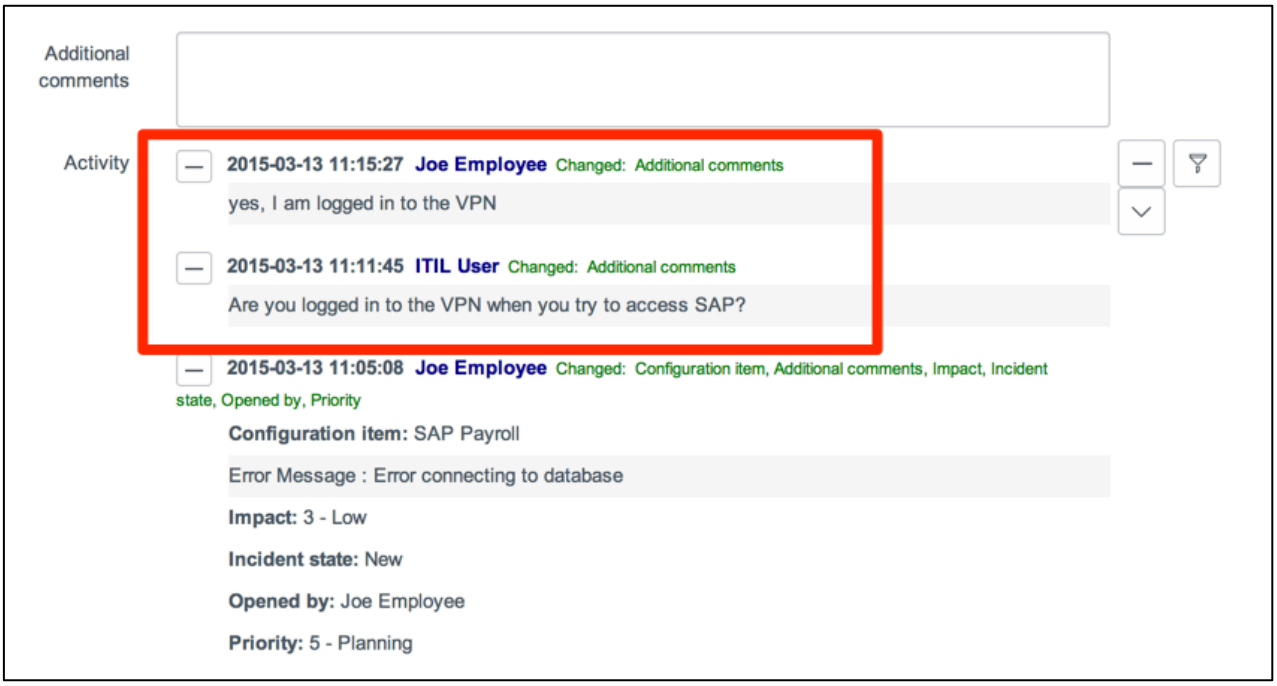
12. Enter the following text into the **Additional Comments** field: **Yes, I am logged in to the VPN**.

13. Click the  icon at the top of the form, and click **Save.**

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Lab Success Verification

The screen should look like the example:



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

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Lab Goal

This lab explains how to leverage the Knowledge Base from within an Incident.

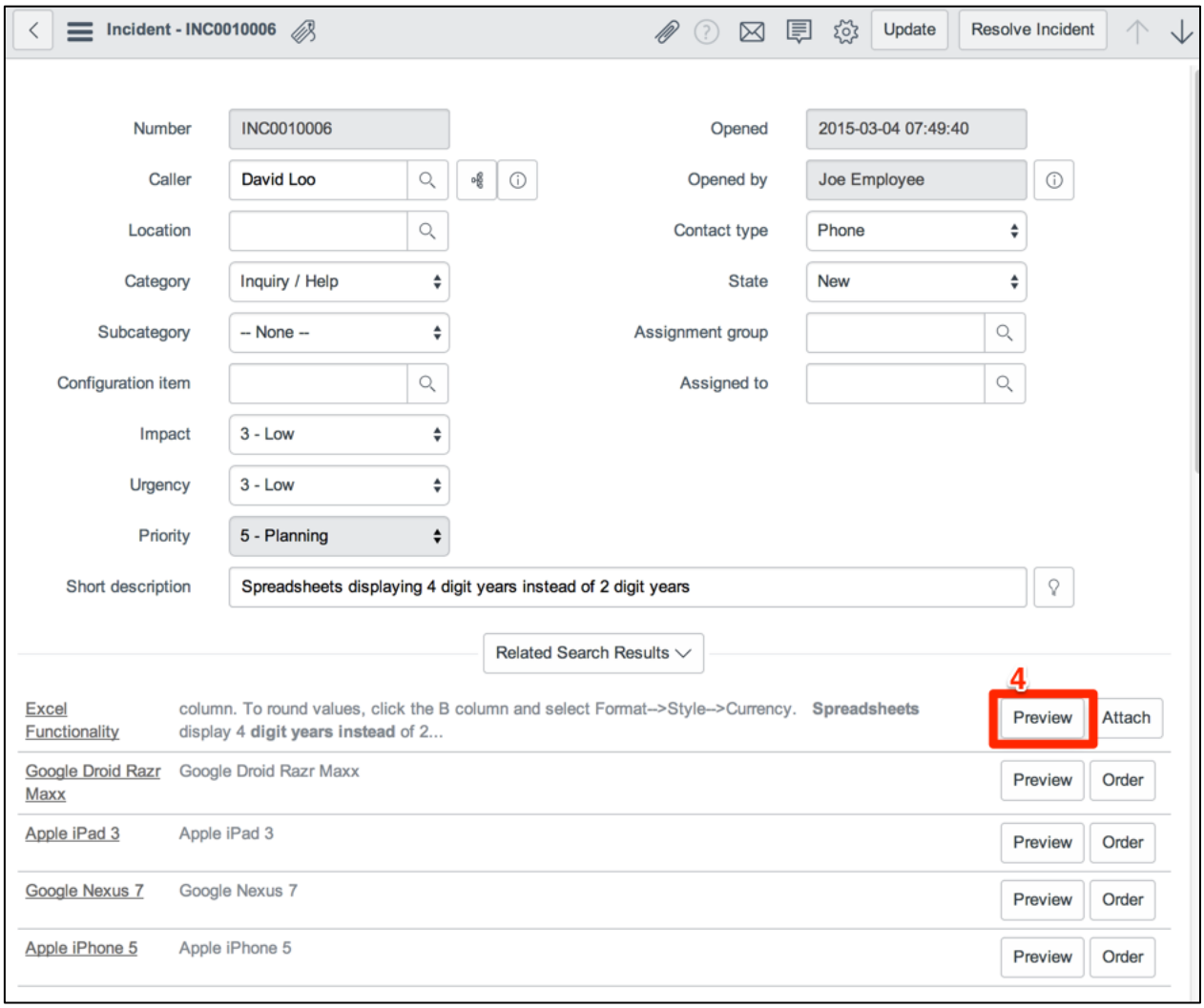
Lab 3.2 Investigate and Diagnose

Use Knowledge to help Resolve an Incident

1. Navigate to your training instance: **https://<<name>>.lab.service-now.com**
2. Log on with **itil/Knowledge15** credentials.
3. Navigate to **Incident > Open,** and open the incident you created (the caller is **Bud Richman**).

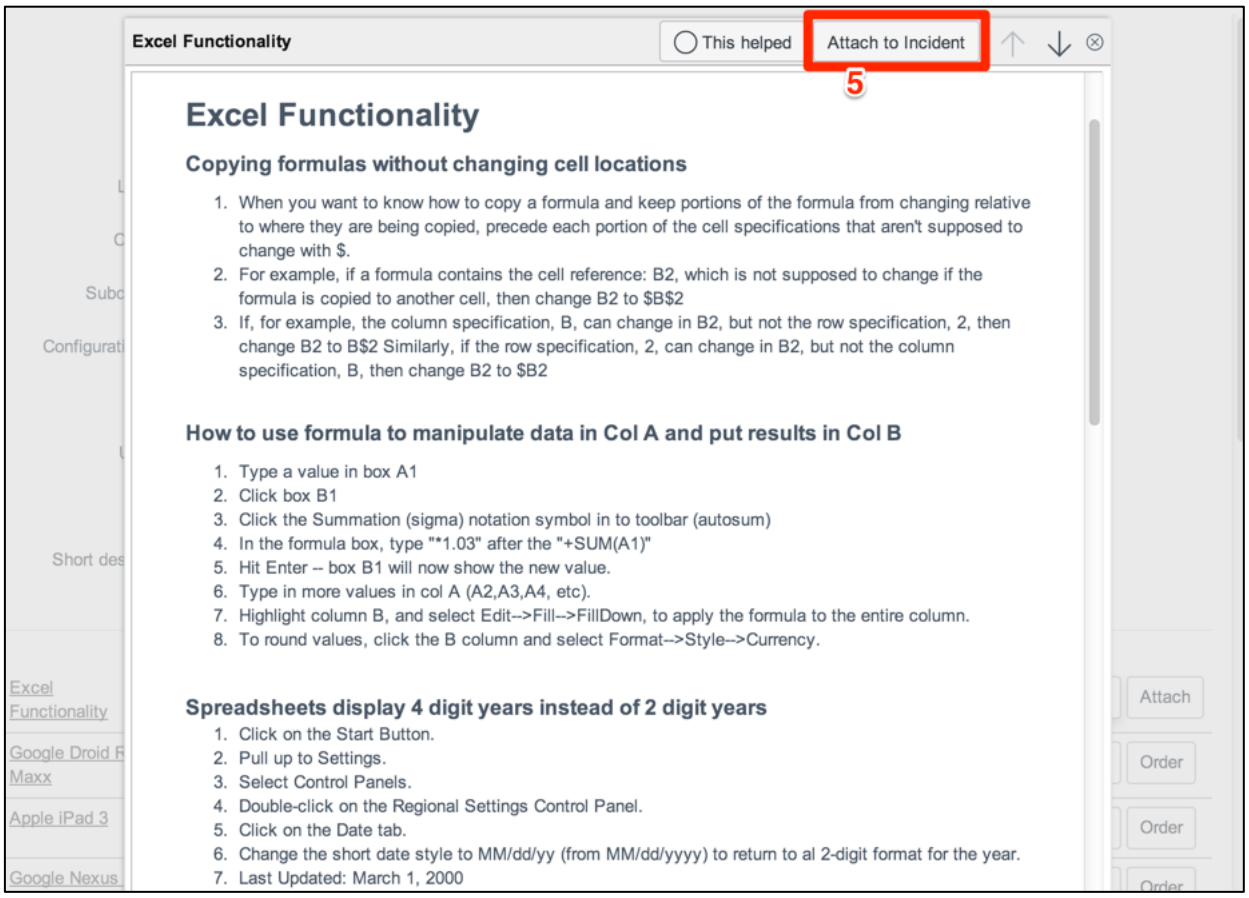
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4. Click **Preview** to view the first suggested Knowledge article under **Related Search Results**.



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



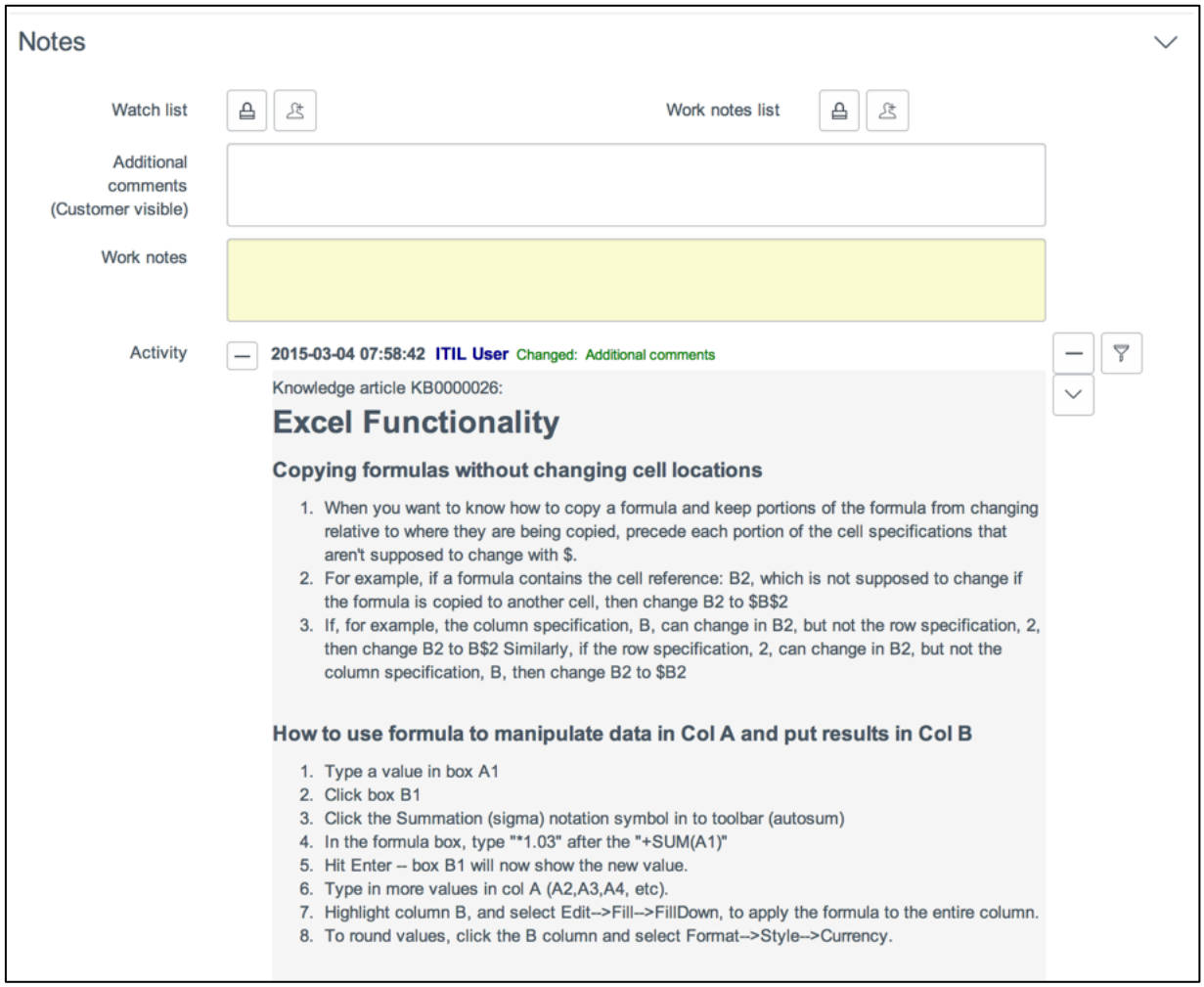
Note: The article is placed into the comments field of the incident in raw HTML format.

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

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Lab Success Verification

The screen should look like the example.



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

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Lab Goal

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

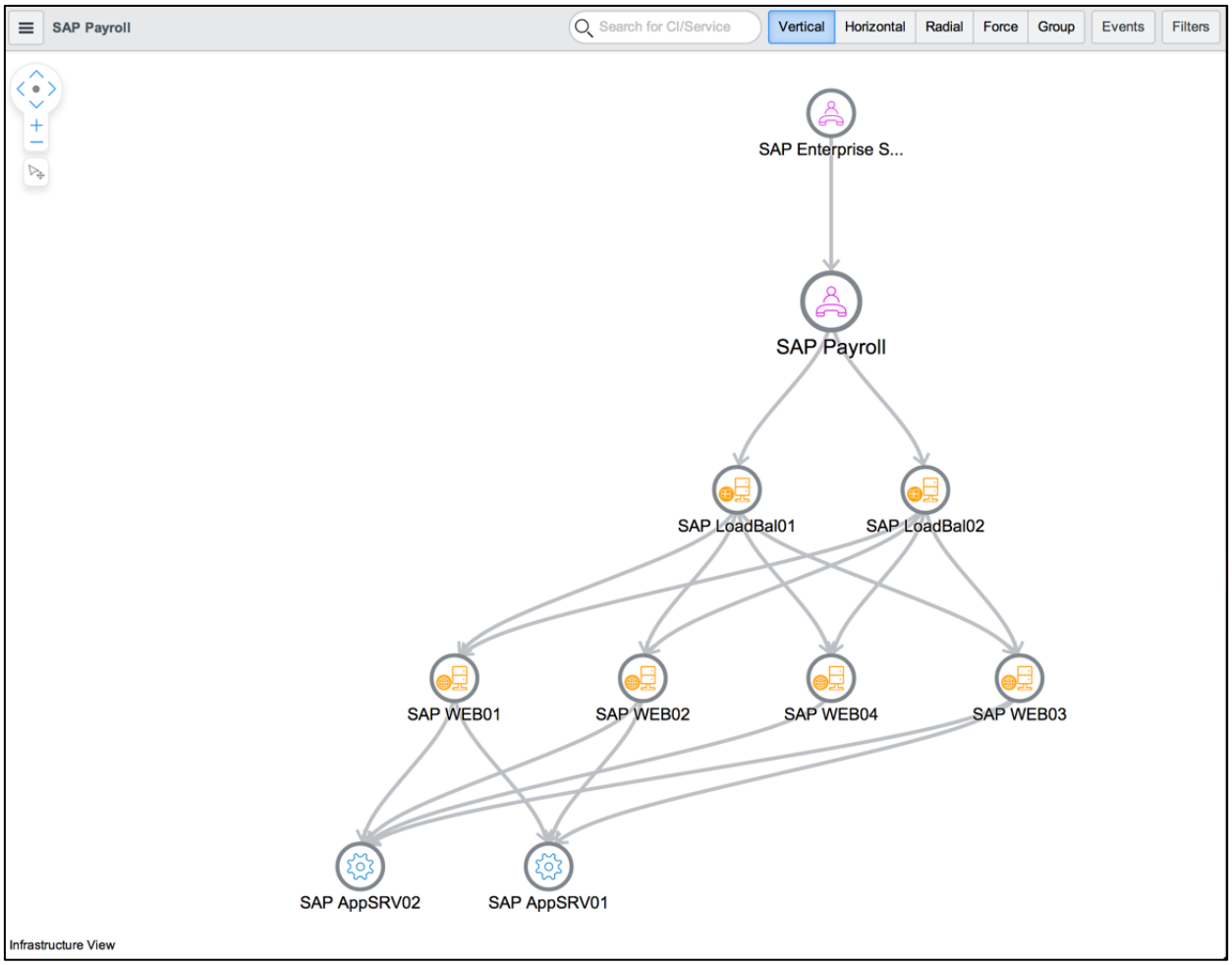
Lab 3.3 Investigate and Diagnose

Troubleshoot the Incident Using the BSM Map

1. Navigate to the **Employee Self-Service** portal in your training instance: **https://<<name>>.lab.service-now.com**
2. Log on with **itil/Knowledge15** credentials.
3. Navigate to **Incident > Open,** and open the incident you created (**Joe Employee** is the caller).
4. Hover the mouse over the **CI Map**  icon next to the **Configuration Item** field.
   Note: A list of the relationships for that CI appears.

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5. Click on the **CI Map** icon.



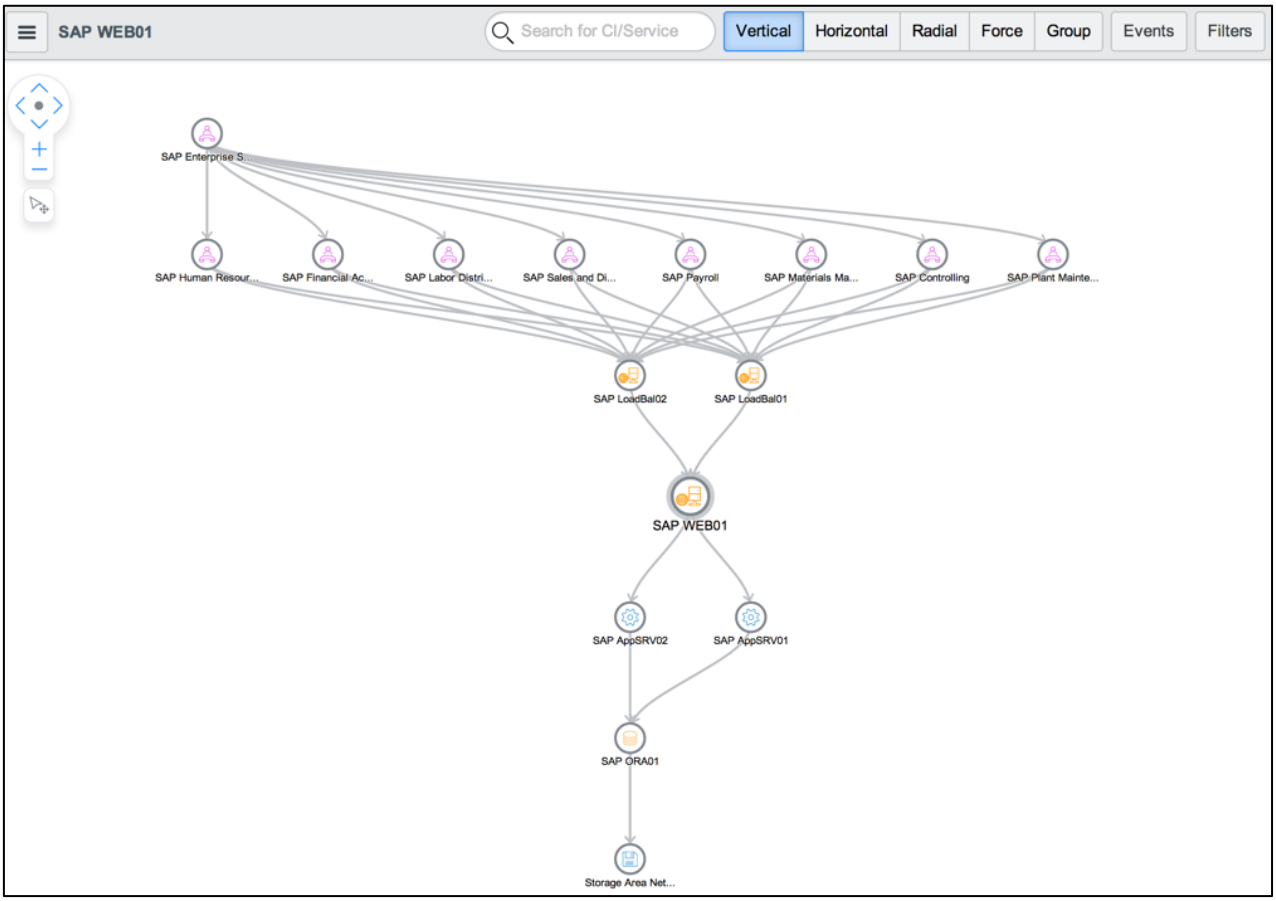
Note: What other Business Services are dependent upon SAP Payroll? What kind of infrastructure is supporting SAP Payroll?

6. Right click on SAP WEB01 and select **View Map.**
Note: SAP WEB01 now supports multiple Business Services. Also note additional infrastructure supporting SAP WEB01.

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Lab Success Verification

The screen should look like the example.



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

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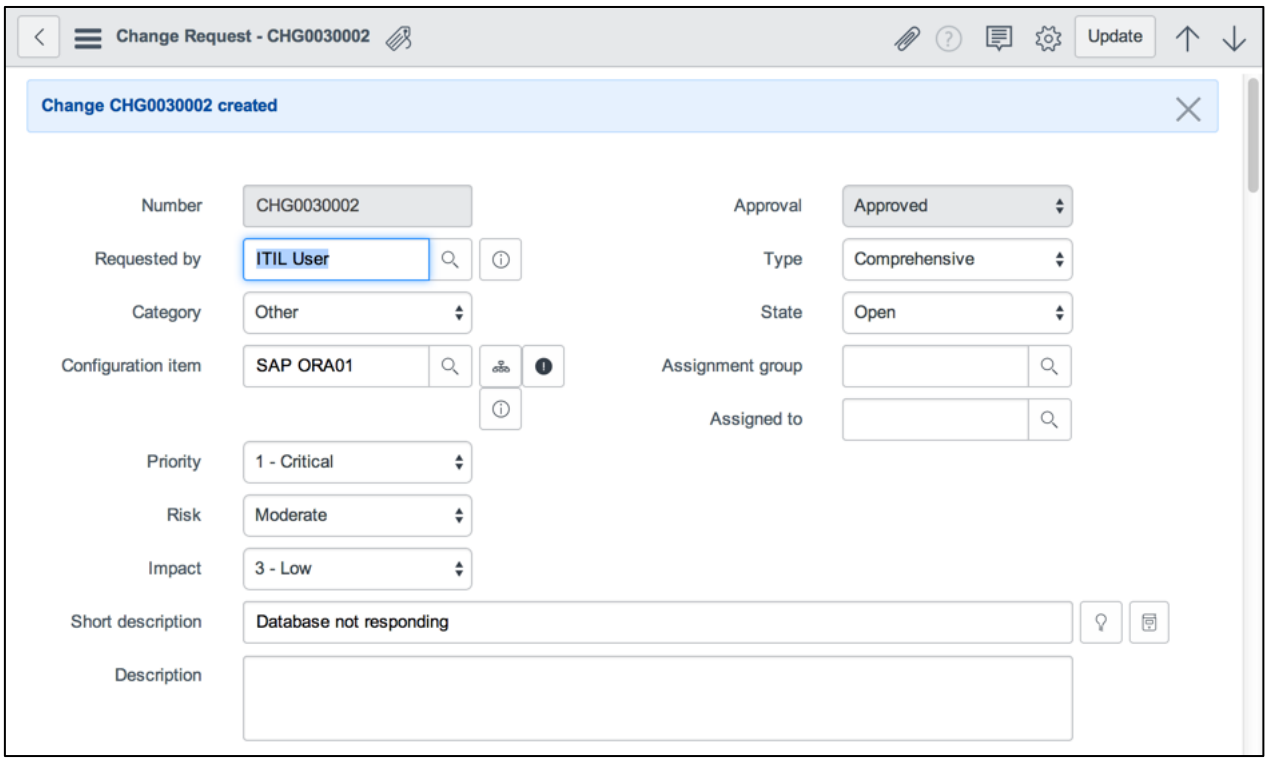
Lab Goal

This lab explains how to create a change Request from an Incident. It also shows that the records are automatically related.

Lab 4
Related Records

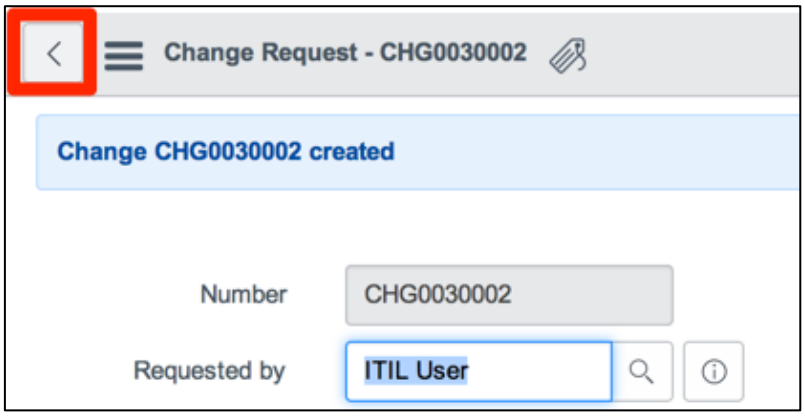
Create a Change Request

1. Navigate to your training instance:
   https://<<name>>.lab.service-now.com
2. Log on with **itil/Knowledge15** credentials.
3. Navigate to **Incident > Open,** and open the incident you created (**Bow Ruggeri** is the caller).
4. Right click on the header bar of the form and click **Create Change.**
   Note: Information from the incident record is automatically populated on the change record.



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5. Click the Back button on the top left of the form to go back to the Incident form.





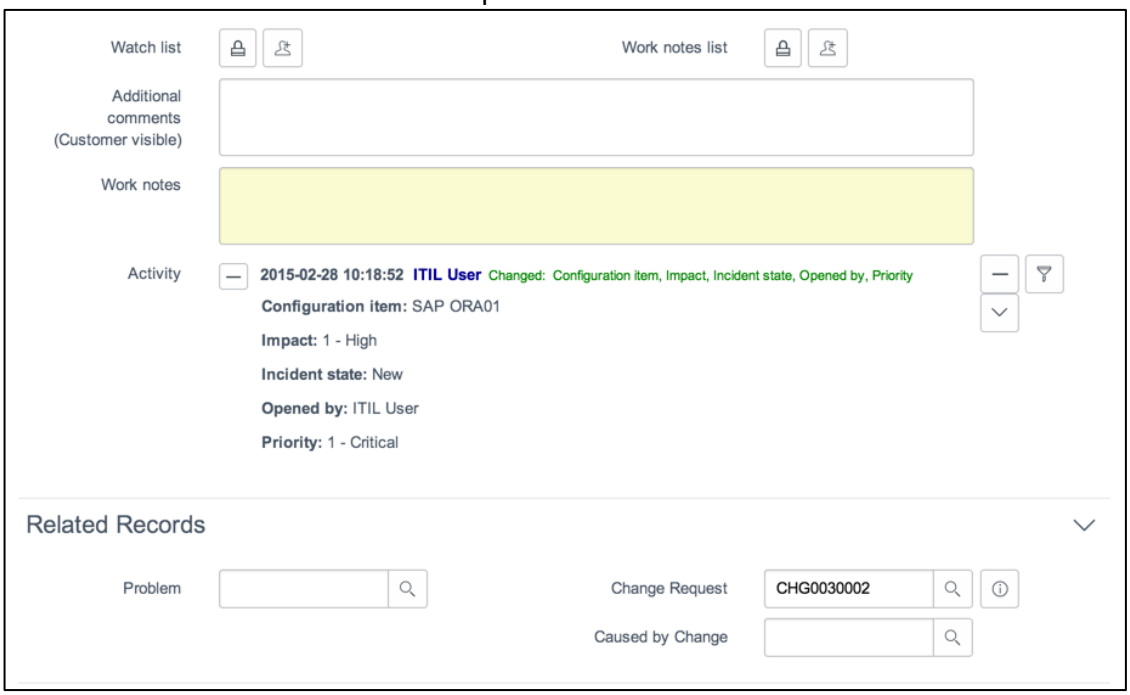
Note: The change request number is populated in the Change Request field.

6. 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

The screen should look like the example.



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

Challenge: Create a Problem record from an Incident record.

Challenge: List 3 other records can be created from an incident.

1.
2.
3.

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Lab Goal

This lab explains how to resolve an incident.

Lab 5
Resolve Incident

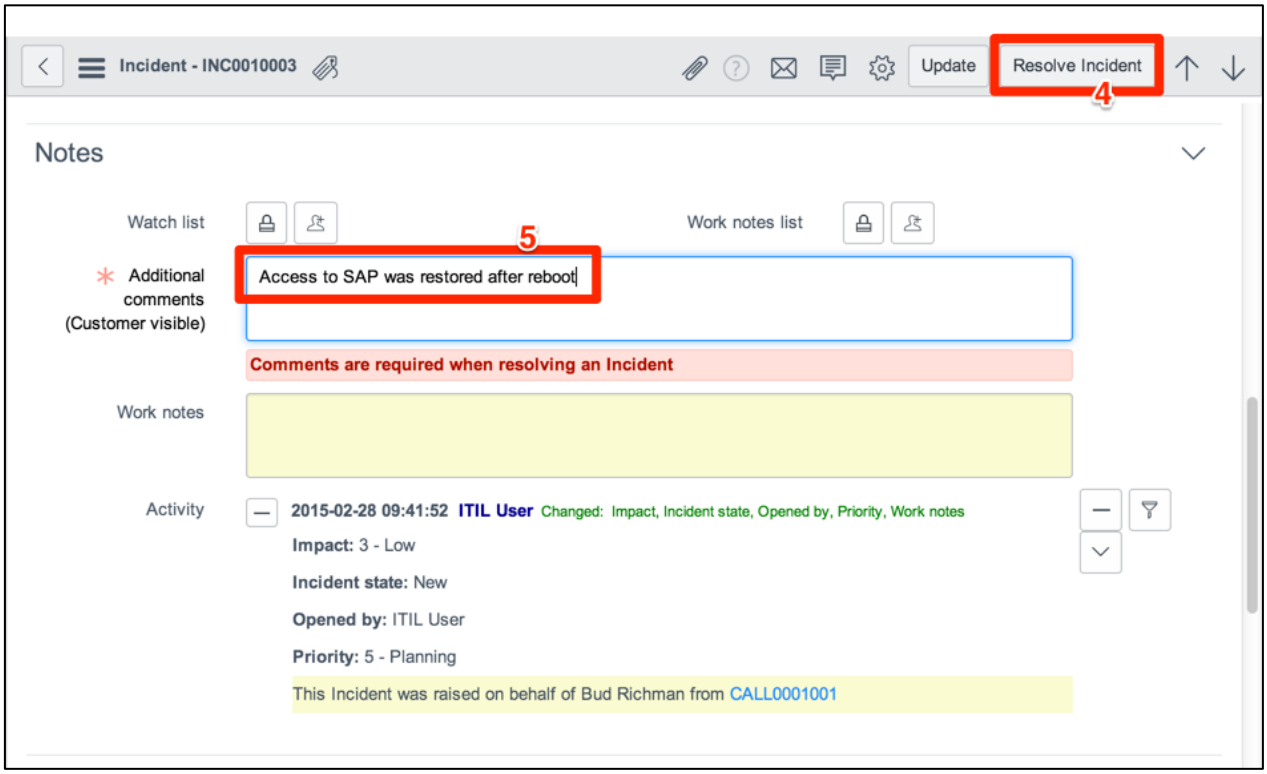
Resolve an Incident

1. Navigate to your training instance: **https://<<name>>.lab.service-now.com**
2. Log on with **itil/Knowledge15** credentials.
3. Navigate to **Incident > Open,** and open the incident you created (the caller is **Bud Richman**).

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

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



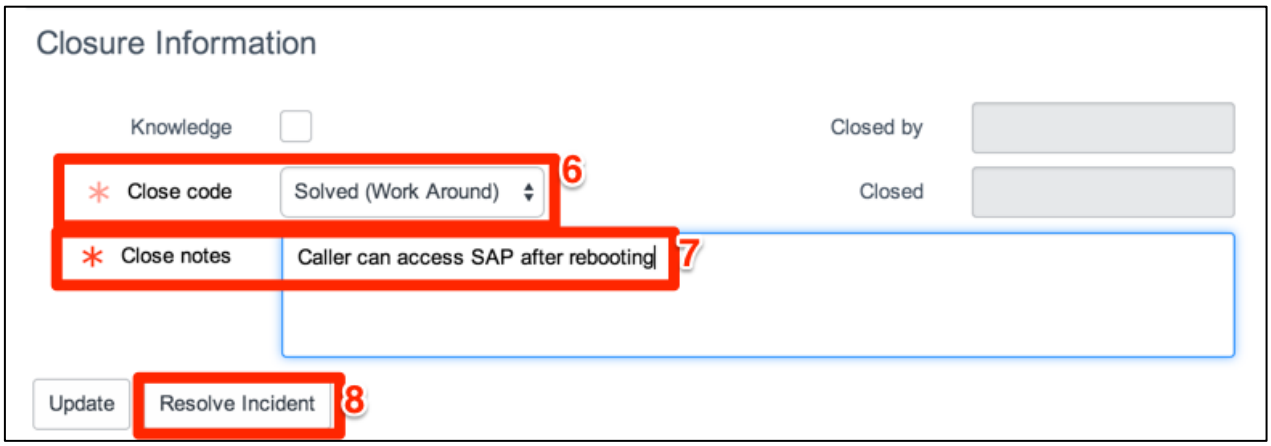
5. In the Notes section, add the following text in the Additional Comments field: **Access to SAP was restored after reboot.**

6. In the Closure Information section, set the Close Code field to **Solved (Work Around).**

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

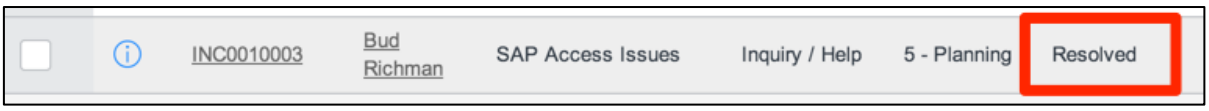
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8. Click the **Resolve Incident** button again.



Lab Success Verification

The screen should look like the example.



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

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Lab Goal

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

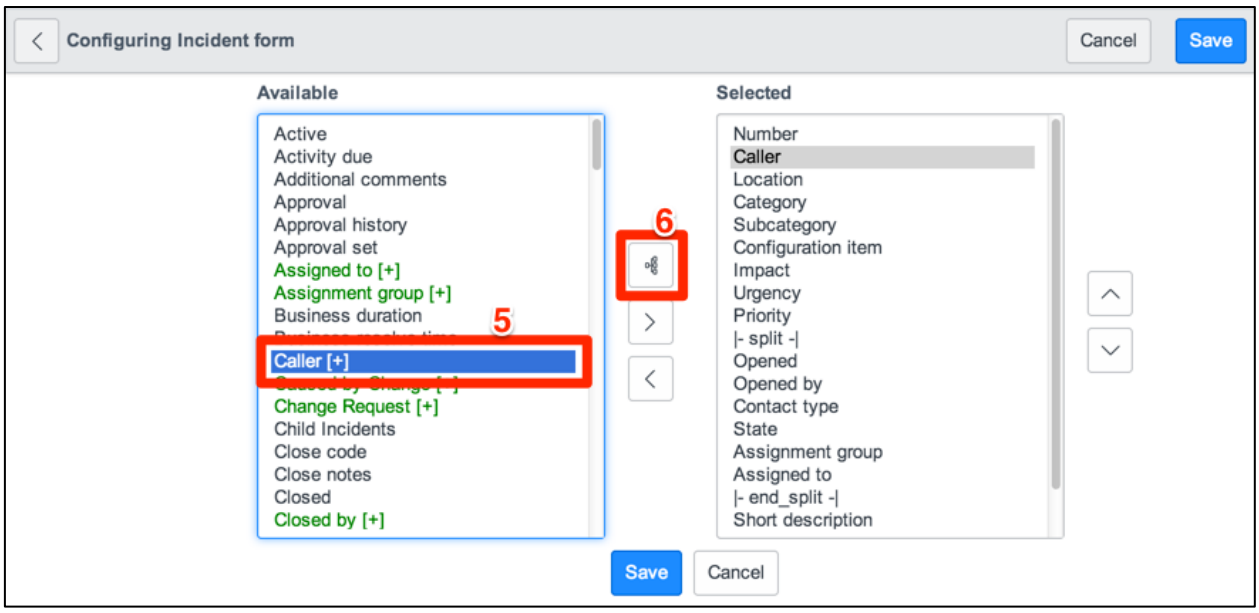
Lab 6.1 Configure Incident Form

Add an Existing Field to the Incident Form

1. Navigate to your training instance: **https://<<name>>.lab.service-now.com**
2. Log on with **admin/Knowledge15** credentials.
3. Navigate to **Incident > Open,** and open the incident you created (the caller is **Bow Ruggeri**).
4. Click on 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. On the left hand side, select **Caller**.

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6. After selecting **Caller**, click the  icon to expand the caller record.



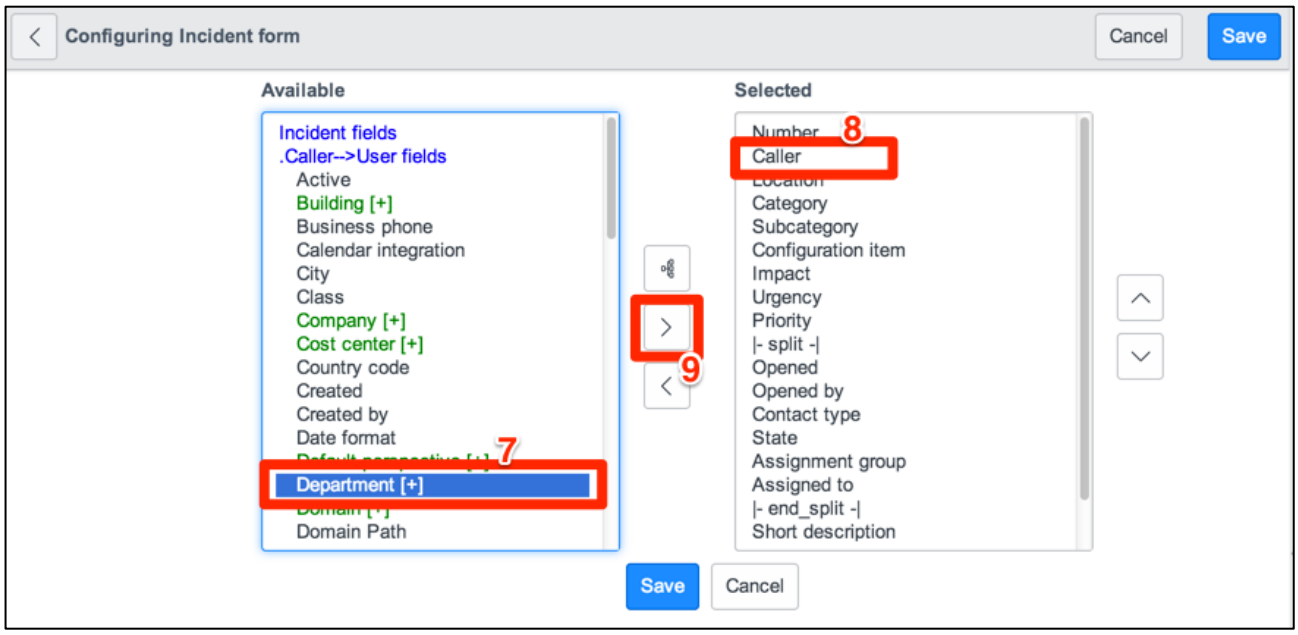
Note: When you click the plus sign, fields from the user record display on the left.

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

8. On the right side, click on **Caller**.
   Note: This determines where on the form the department field will display.

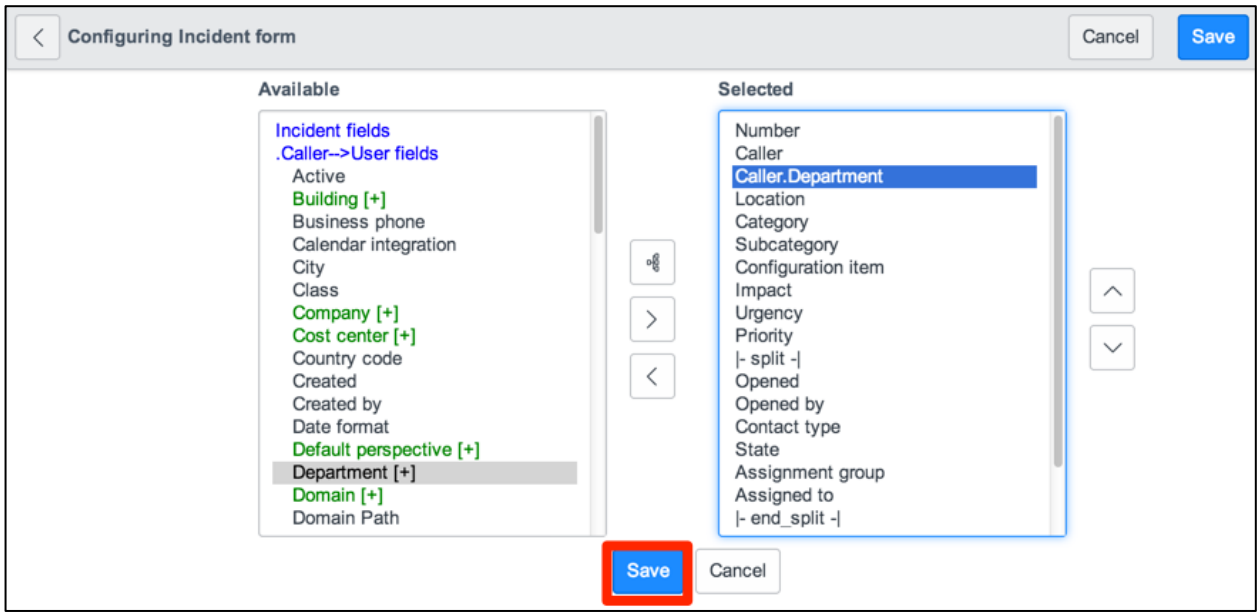
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9. Click the **Add** button.



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

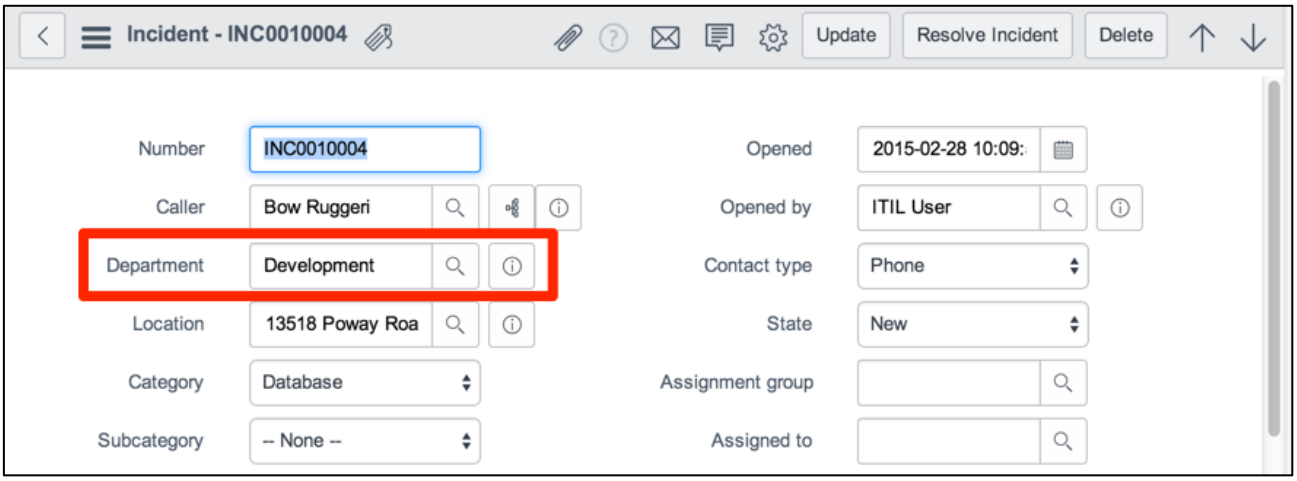
10. Click **Save**.



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Lab Success Verification

The screen should look like the example.



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

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 dropdown field to the form and add choice values.

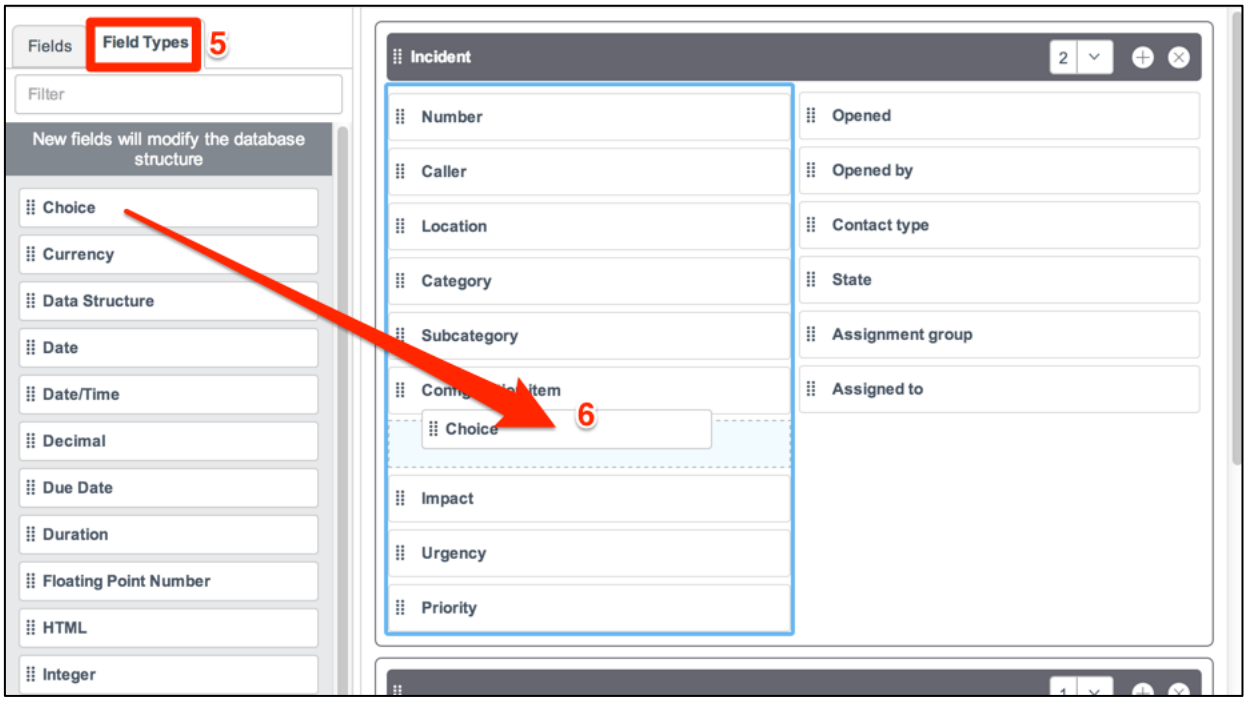
Lab 6.2 Configure Incident Form

Add a New Field to the Incident Form

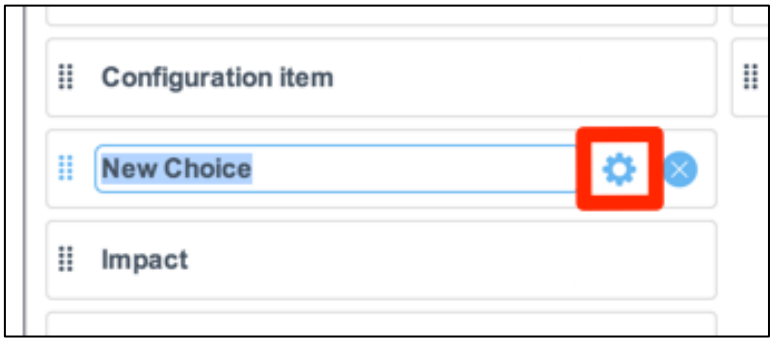
1. Navigate to your training instance: **https://<<name>>.lab.service-now.com**
2. Log on with **admin/Knowledge15** credentials.
3. Navigate to **Incident > Open,** and open the incident you created (the caller is **Bow Ruggeri**).
4. Click on the  icon and select **Configure > Form Design**.
5. On the top left, select **Field Types**. This displays a list of different field types for the new field.

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6. Select **Choice,** which is the first option in the list, and drag it onto the form beneath the **Configuration Item** field**.**

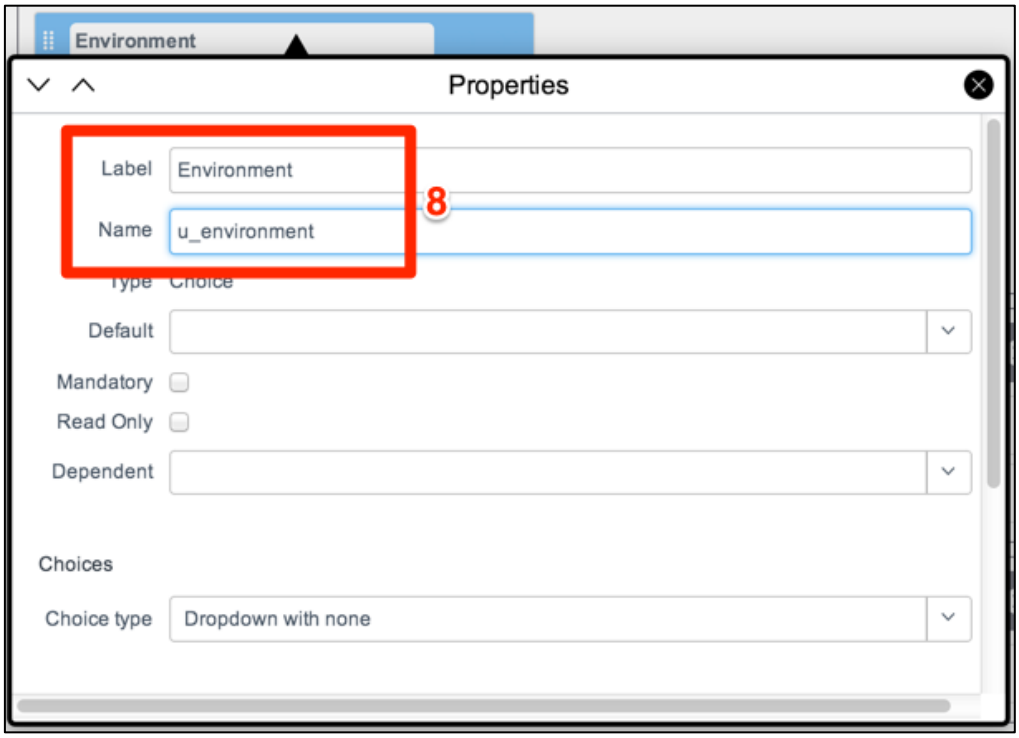


7. Hover the mouse over the **New Choice** field, and click the Gear Icon to configure the new field.



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

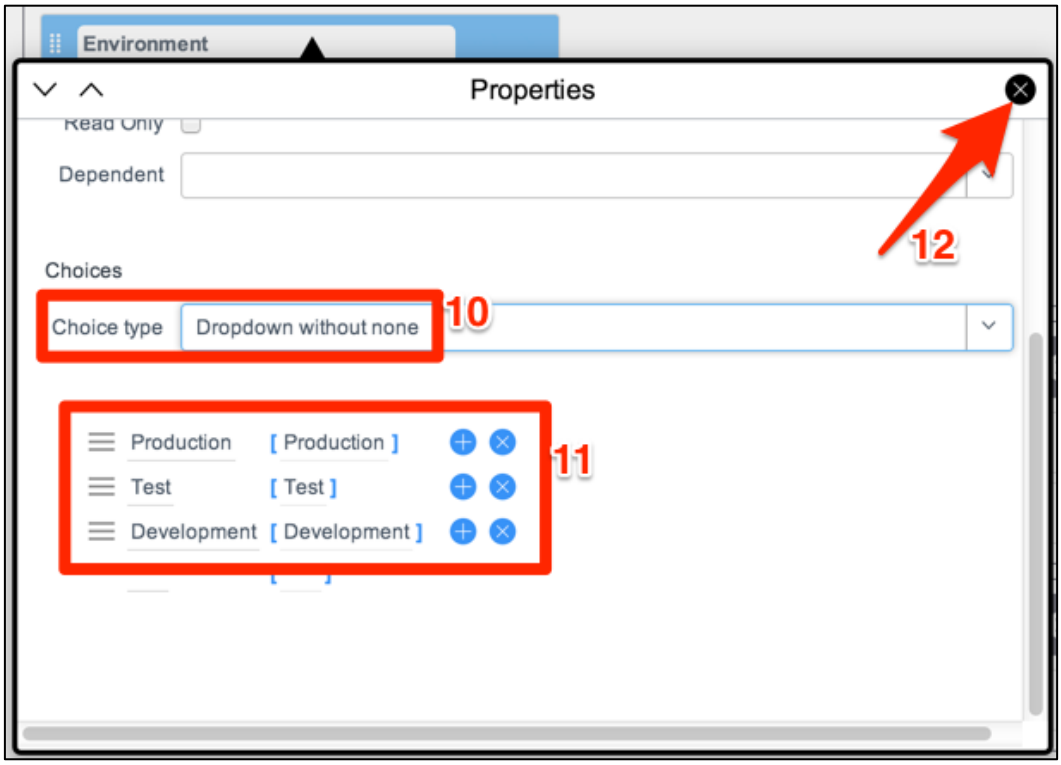


9. In the Properties window, scroll down to configure the choices for this field.

10. Change the **Choice type** to **Dropdown without none**.

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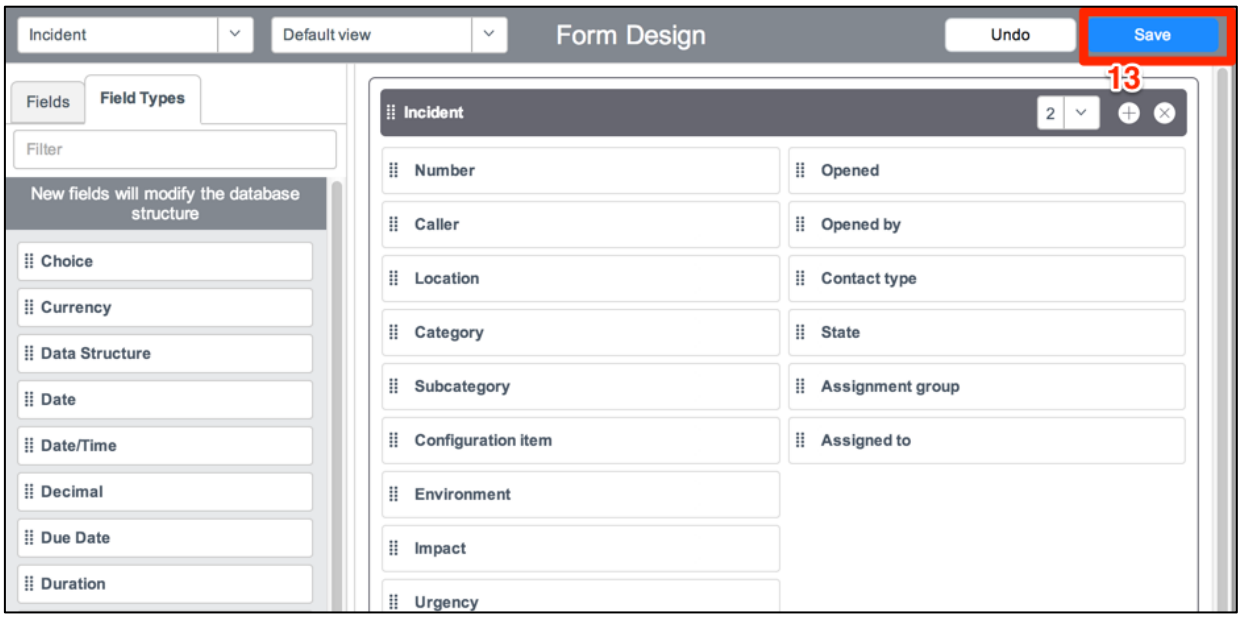
11. In the choice section at the bottom, add the following items: **Production**, **Test**, **Development.**



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

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



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



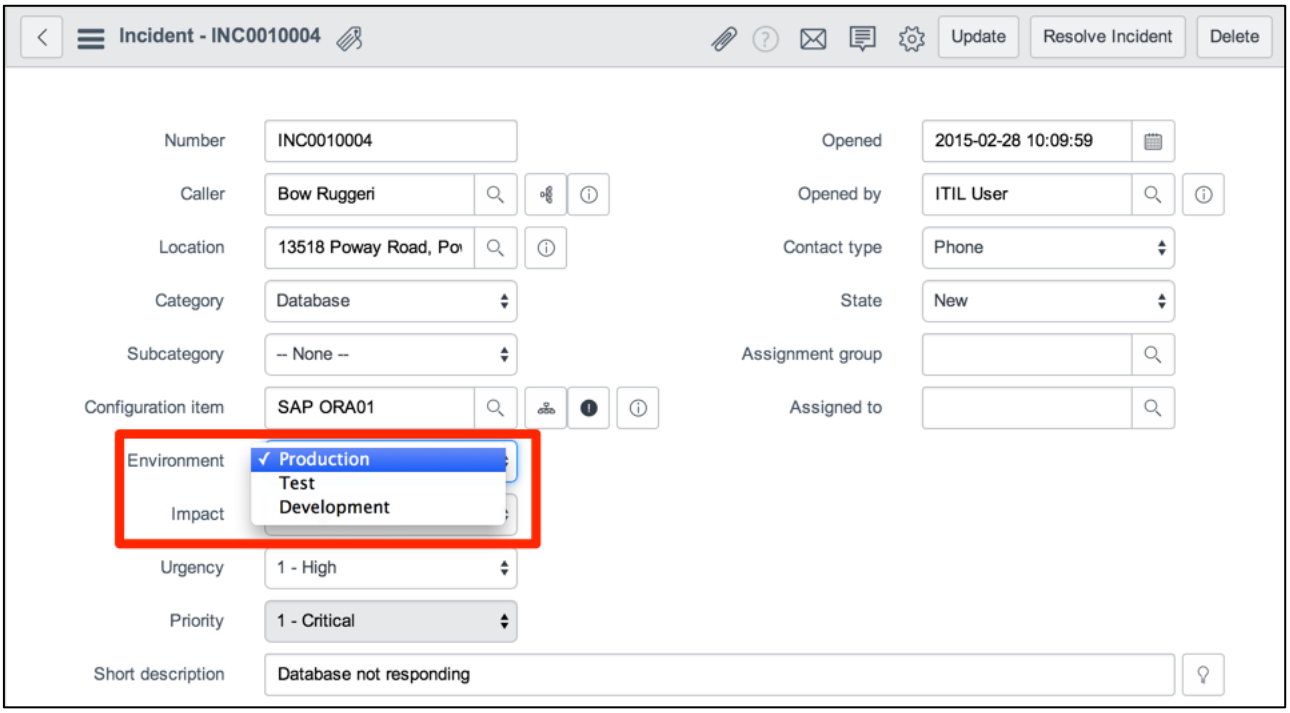
14. After the progress bar completes, close out the **Form Design** tab in the browser and return to the Incident form.

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

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Lab Success Verification

The screen should look like the example.



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

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Lab Goal

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

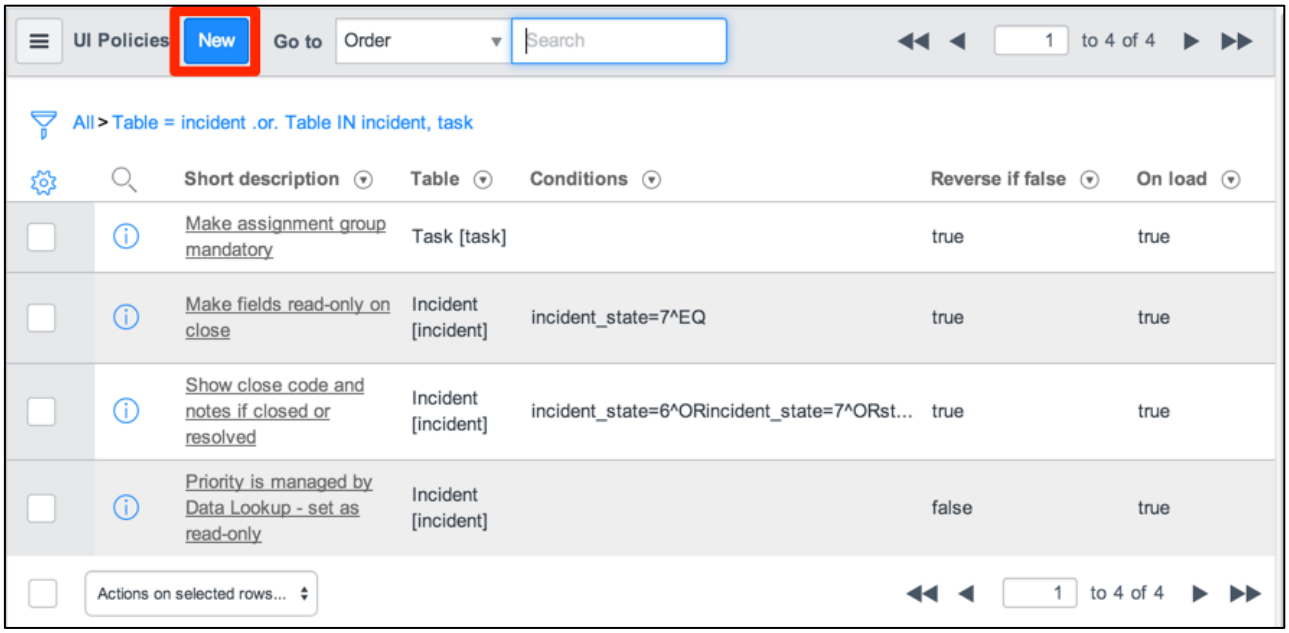
Lab 6.3 Configure Incident Form

Create a UI Policy for the New Field

1. Navigate to your training instance: **https://<<name>>.lab.service-now.com**
2. Log on with **admin/Knowledge15** credentials.
3. Navigate to **Incident > Open,** and open the incident you created (the caller is **Bow Ruggeri**).
4. Click on the  icon and select **Configure > UI Policies**.

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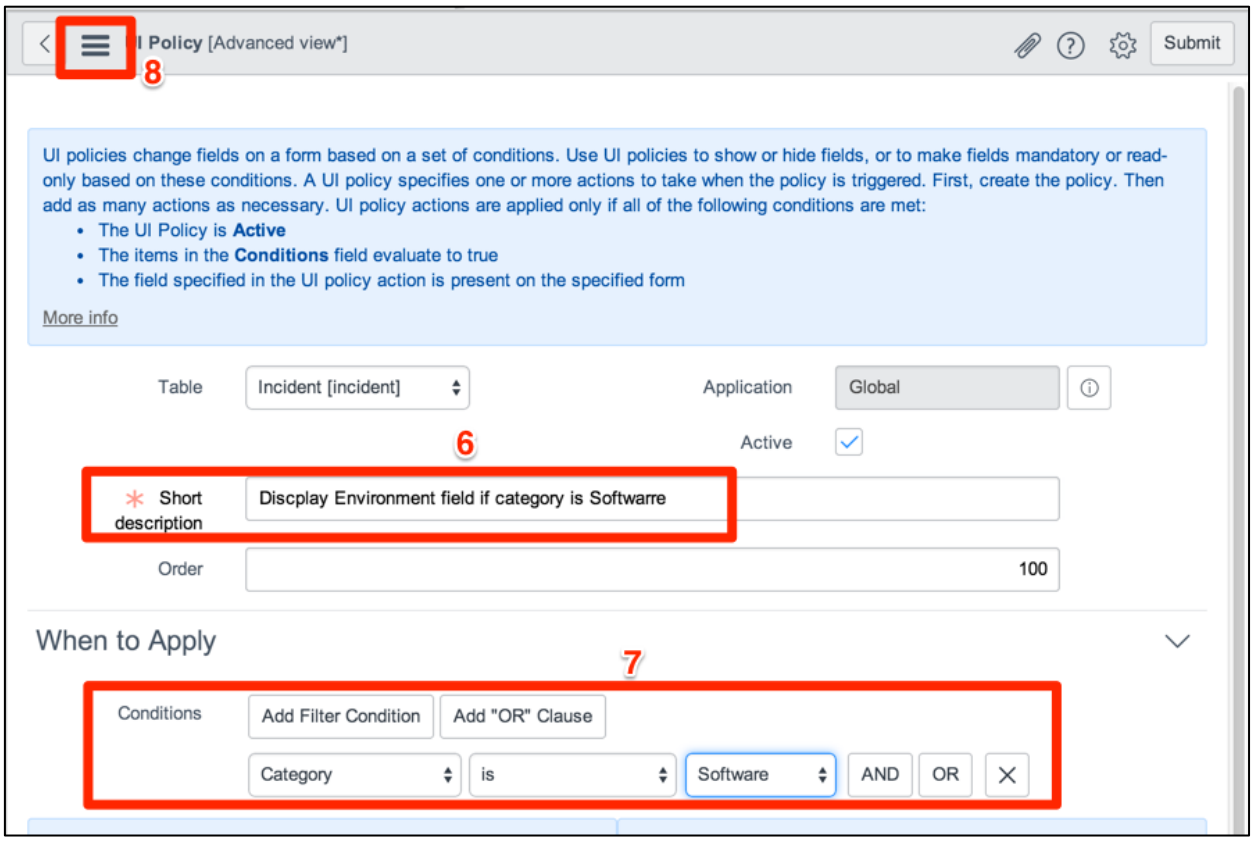
5. Click **New** to create a new UI Policy.



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

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

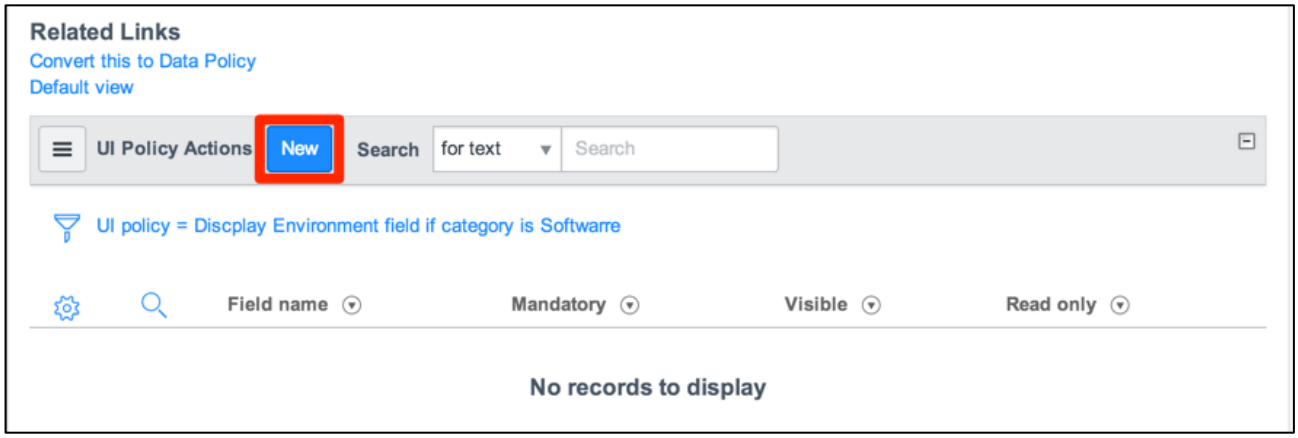


8. Click the ☰ icon at the top of the form and click **Save**.

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

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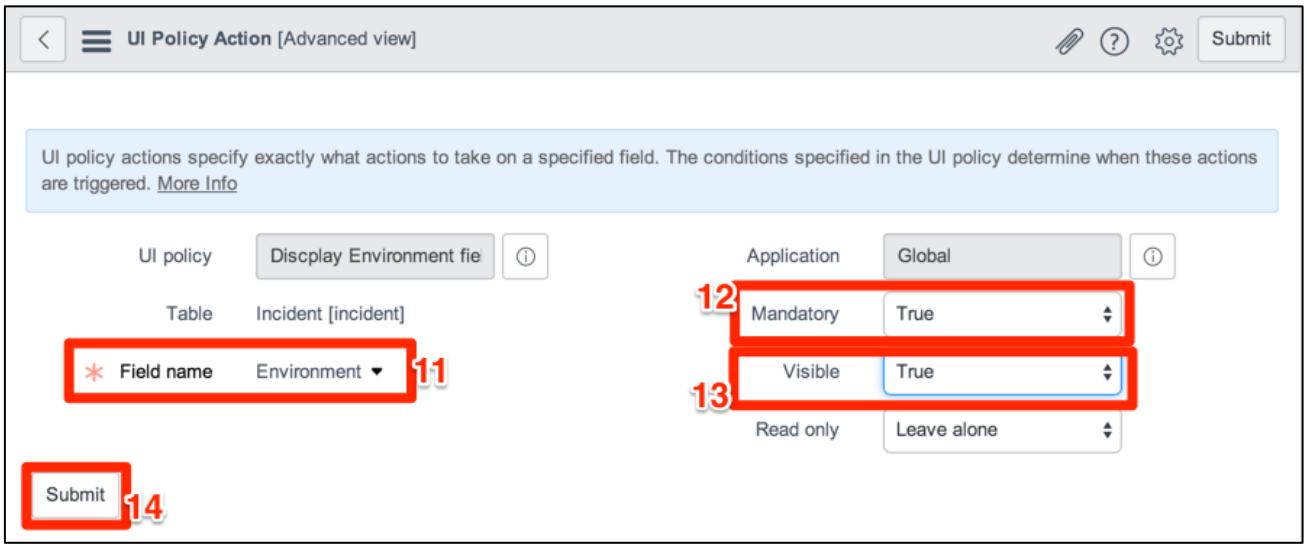
10. Click **New** to create a UI Policy Action.



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

12. Set Mandatory to **True**.

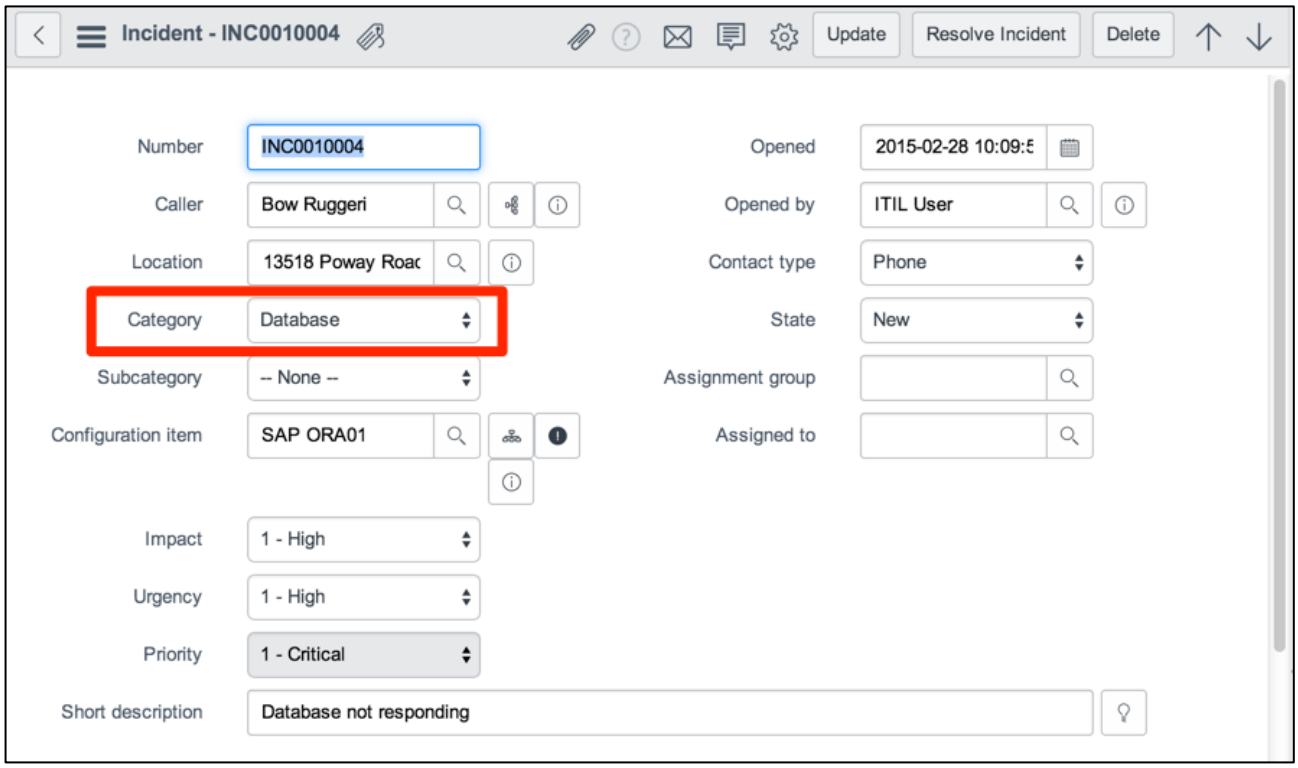
13. Set Visible to **True**.



14. Click **Submit**.

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

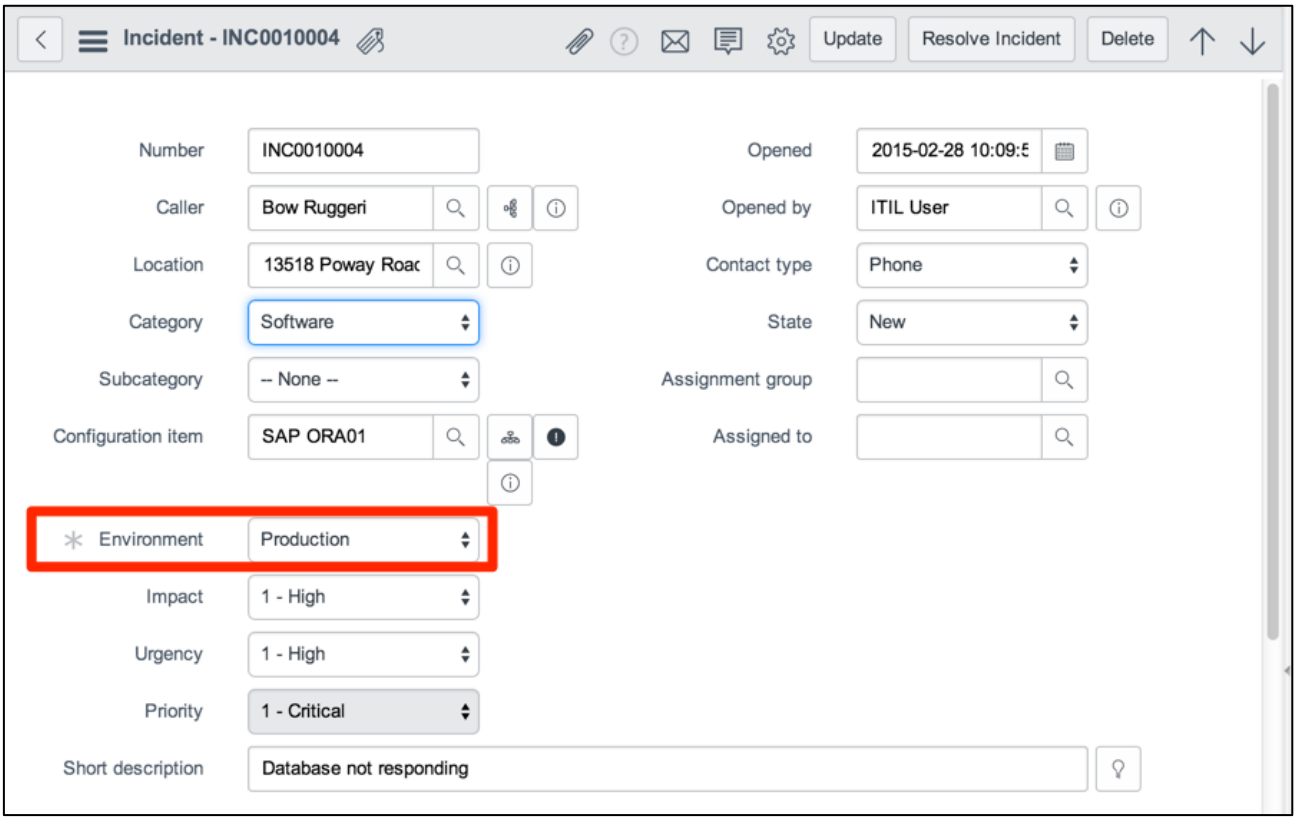


16. Change the Category to **Software**.
    Note: Since the Category is now **Software**, the Environment field is now visible and mandatory.

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Lab Success Verification

The screen should look like the example.



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

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Lab Goal

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

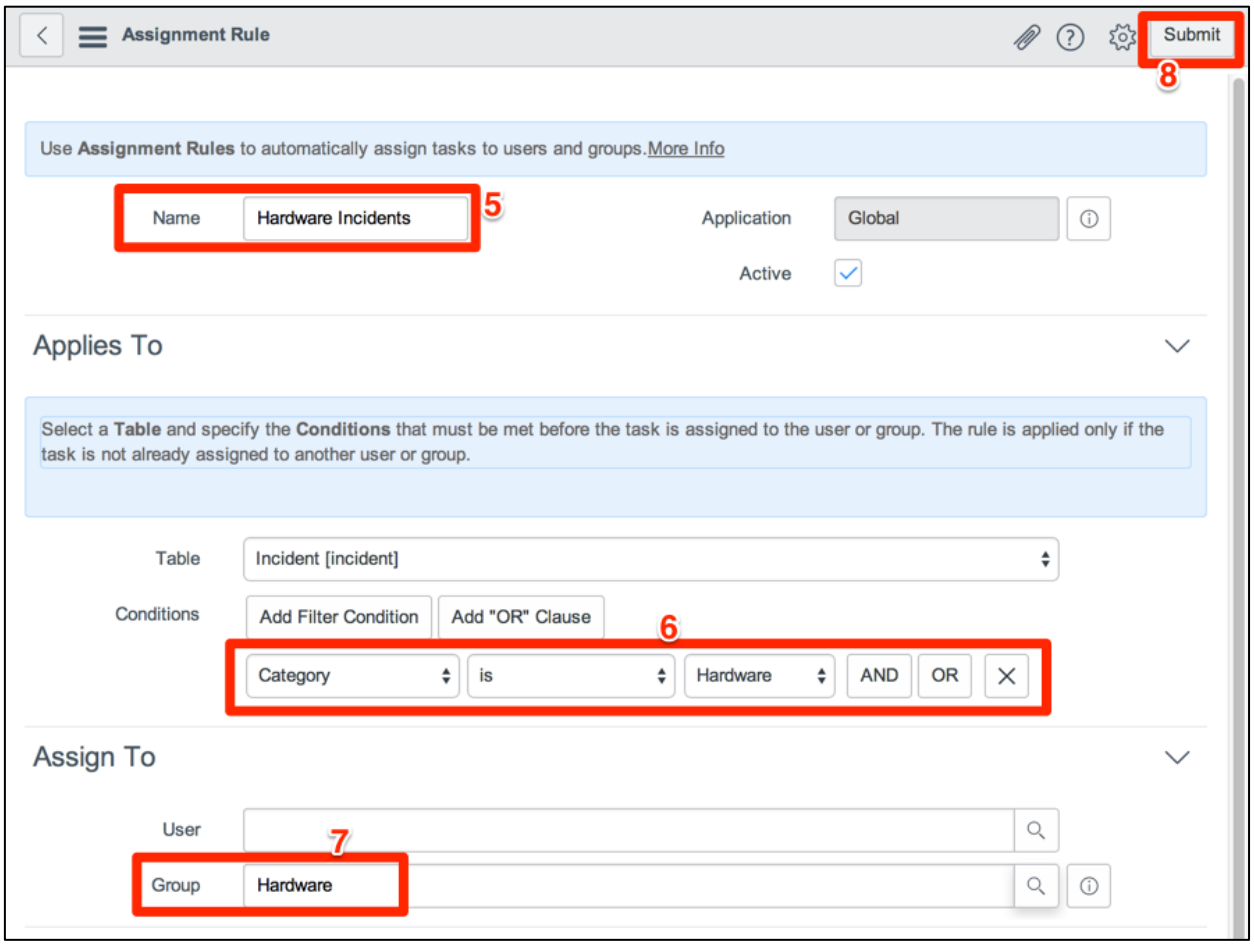
Lab 7.1
Incident Automation

Create an Assignment Rule

1. Navigate to your training instance: **https://<<name>>.lab.service-now.com**
2. Log on with **admin/Knowledge15** credentials.
3. Navigate to **System Policy > Rules > Assignment**.
4. Click **New** to create a new Assignment Rule.
5. Set the Name to **Hardware Incidents**.

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6. In the **Applies To** section, set the Condition to **Category is Hardware**.



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

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

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

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

11. Set the Category to **Hardware**.

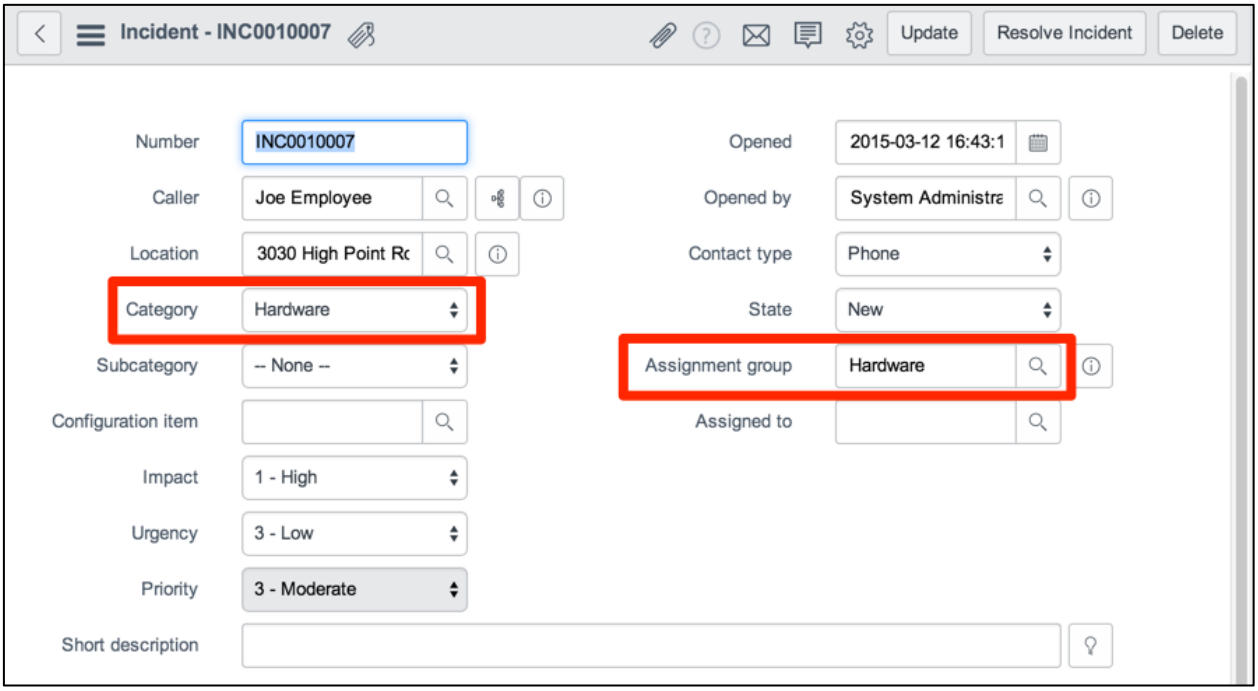
12. Click the ☰ icon at the top of the form and click **Save**.

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

Lab Success Verification

The screen should look like the example.



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

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Lab Goal

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

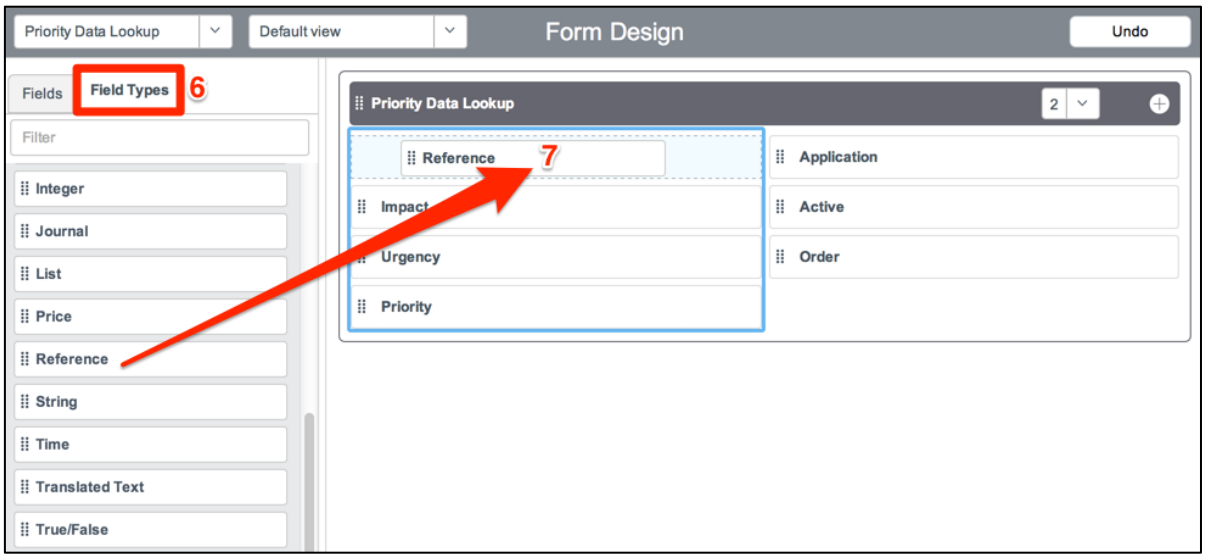
Lab 7.2
Incident Automation

Modify the Priority Lookup Rules

1. Navigate to your training instance: **https://<<name>>.lab.service-now.com**
2. Log on with **admin/Knowledge15** credentials.
3. Navigate to **System Policy > Rules > Priority Lookup Rules**.
4. Click **New** to create a new Priority Lookup.
5. Click on 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.

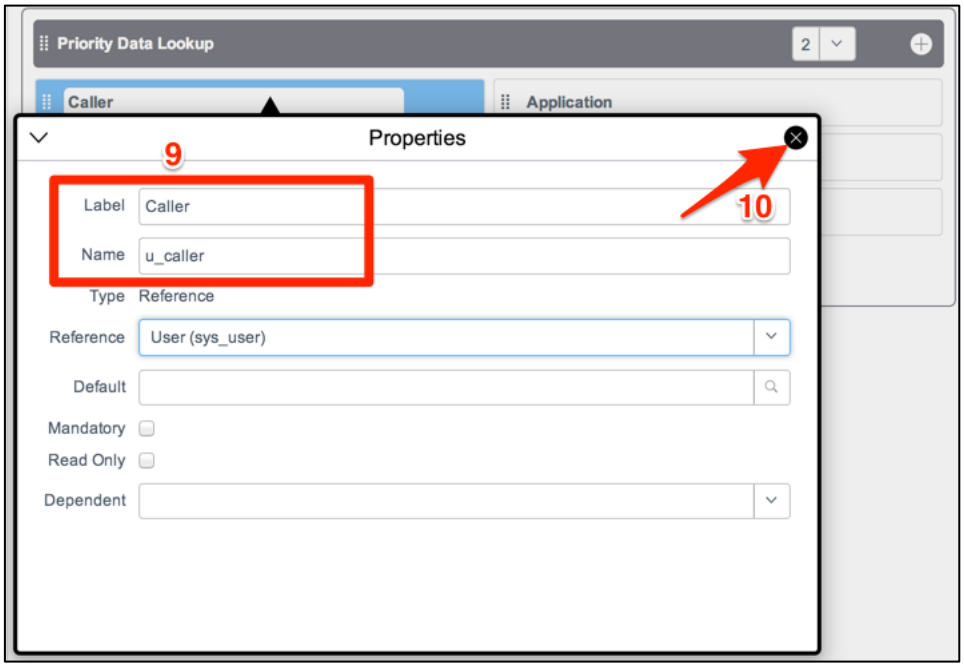
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7. Select **Reference**, and drag it onto the form above the **Impact** field.



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**, and the Name to **u_caller.**



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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.



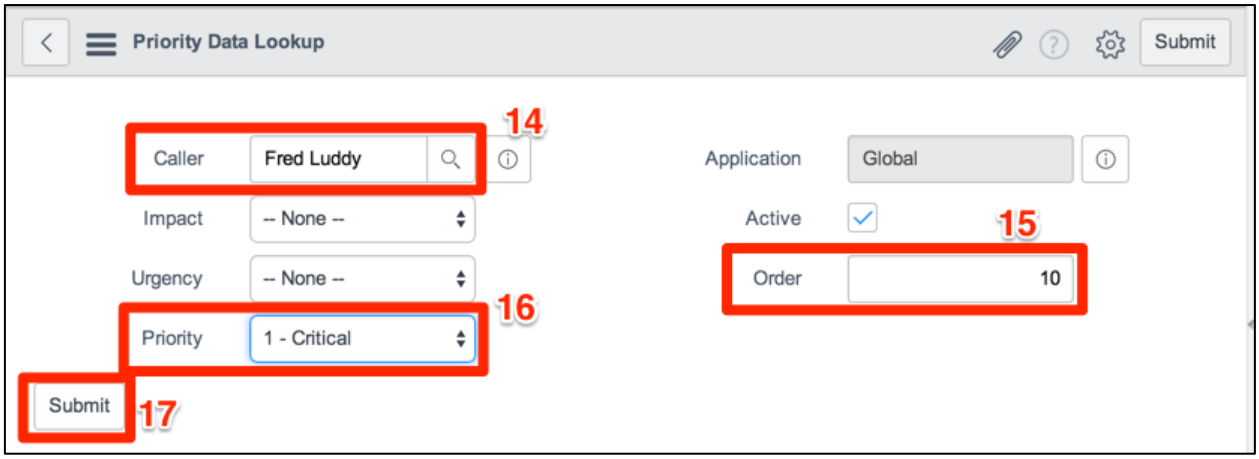
12. After the progress bar completes, close out the **Form Design** tab in the browser and return to the Priority Data Lookup form.

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**.

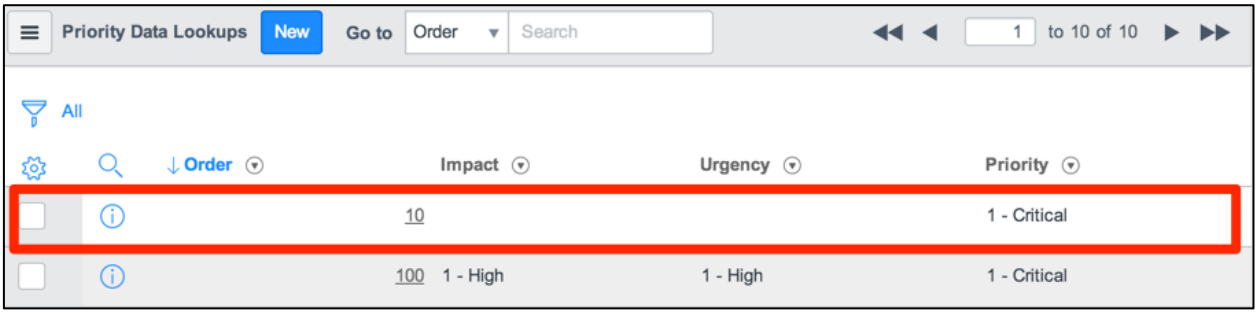
16. Set the Priority field to **1 - Critical**.



17. Click **Submit**.

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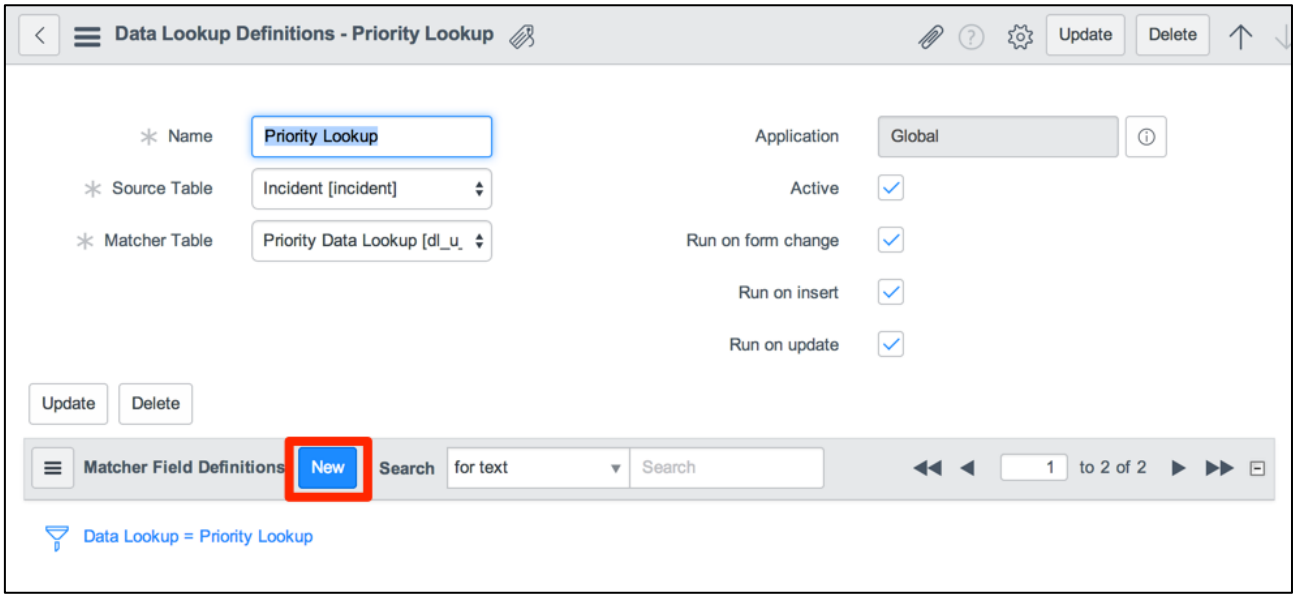
The screen should look like this example:



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

19. Click to open **Priority Lookup**.

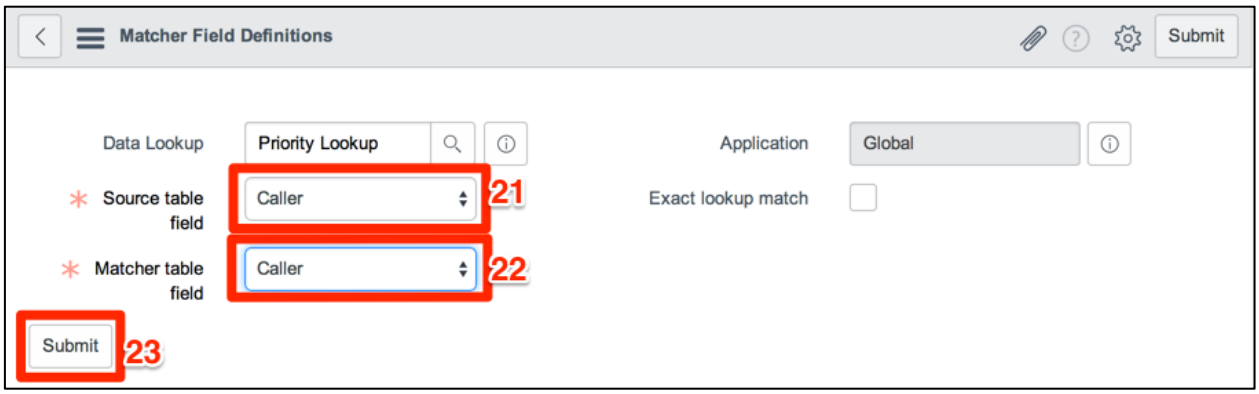
20. Under the Matcher Field Definitions section, click **New**.



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

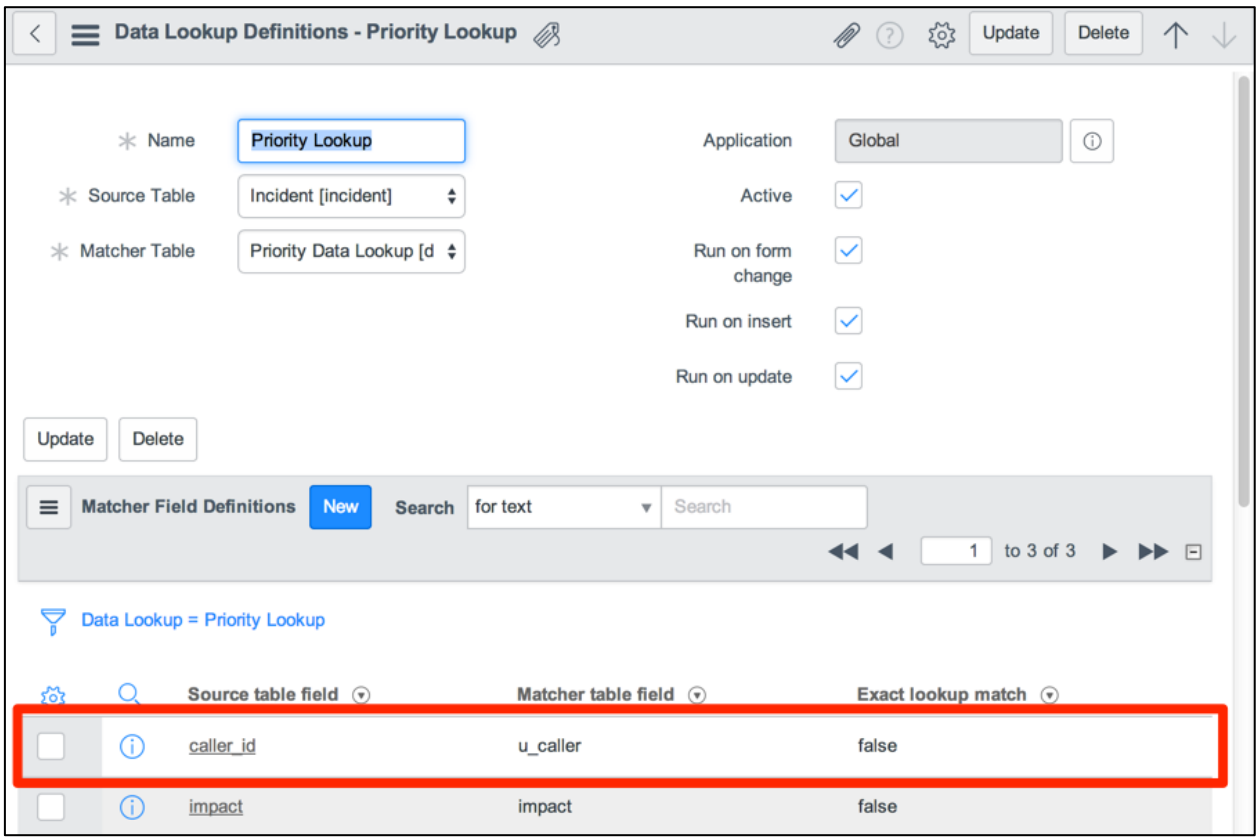
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22. Set the **Matcher** table field to **Caller**.



23. Click **Submit**.

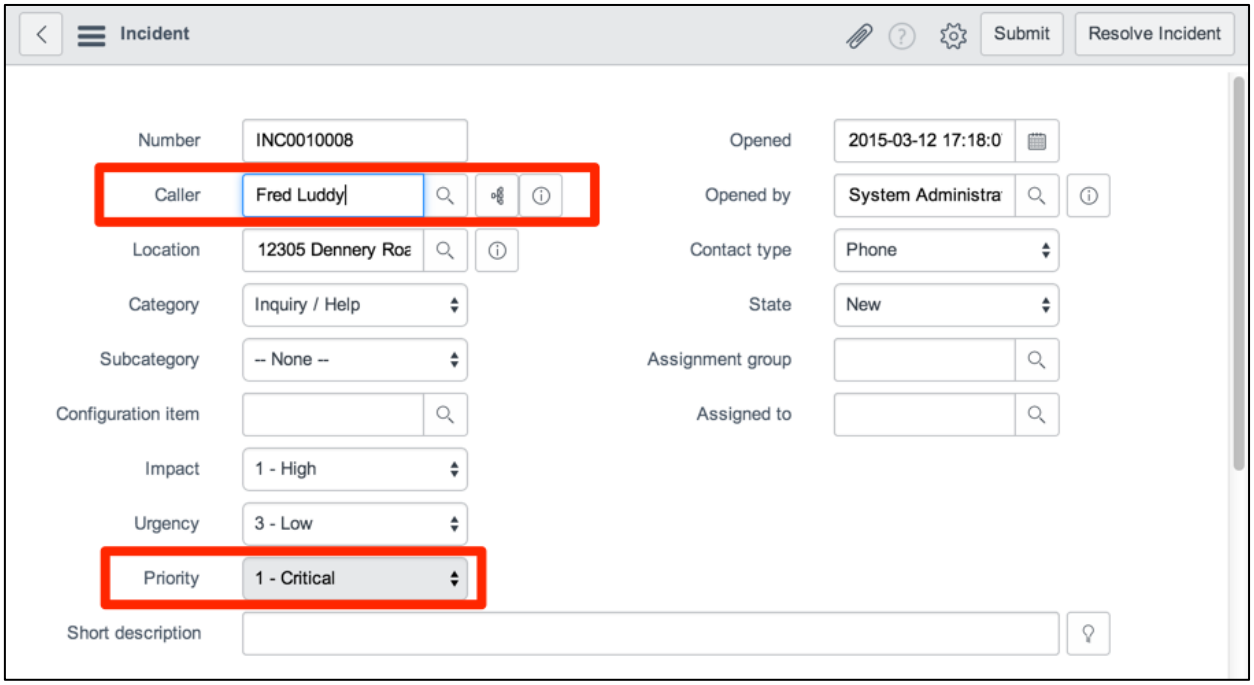
The screen should look like this example:



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Lab Success Verification

1. Create a new incident.
2. Set the caller to be **Fred Luddy**.
3. Verify that Priority is **1 – Critical.**
4. Navigate to **Lab Management > Report Lab Progress.** Click **I am done!**



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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.

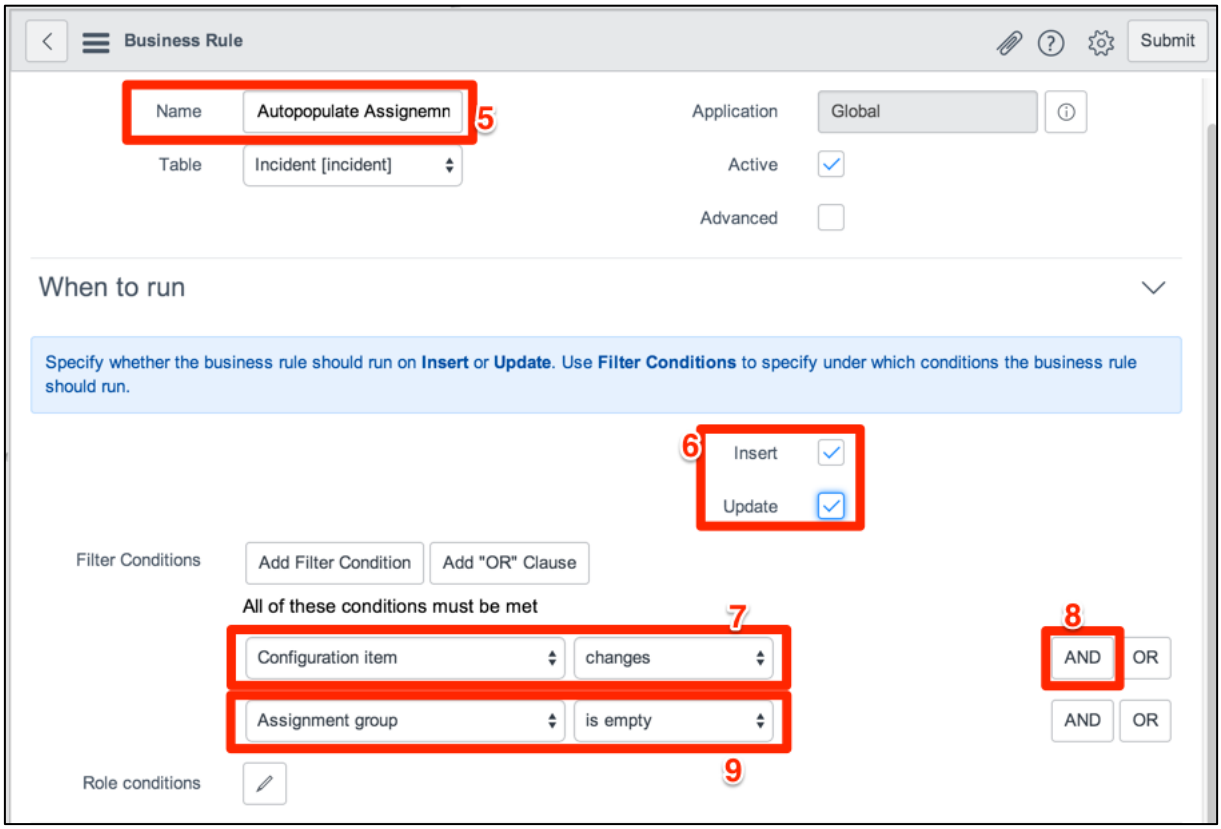
Lab 7.3
Incident Automation

Create a Client Script to Set Assignment Group

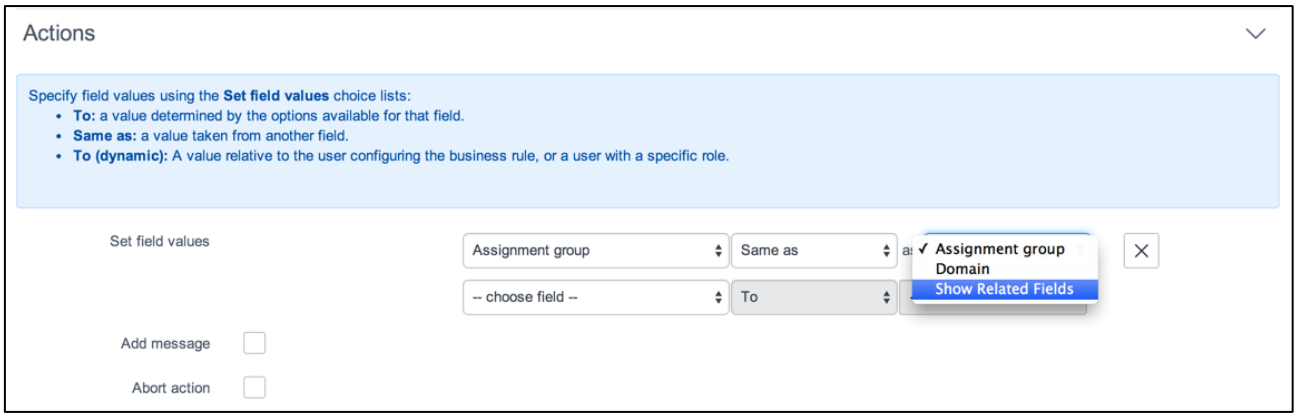
1. Navigate to your training instance: **https://<<name>>.lab.service-now.com**
2. Log on with **z** credentials.
3. Navigate to **Incident > Open**, right click on the header and select **Configure > Business Rules.**
4. Click **New** to create a new Business Rule.
   Note: The Table is already populated 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.



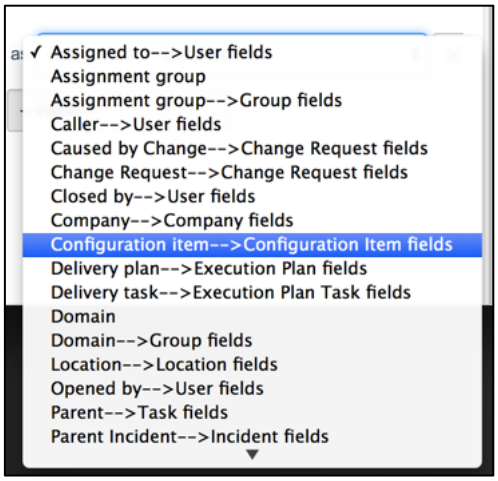
10. In the Actions section, change Set field values to **Assignment group – Same as – Show Related Fields**.



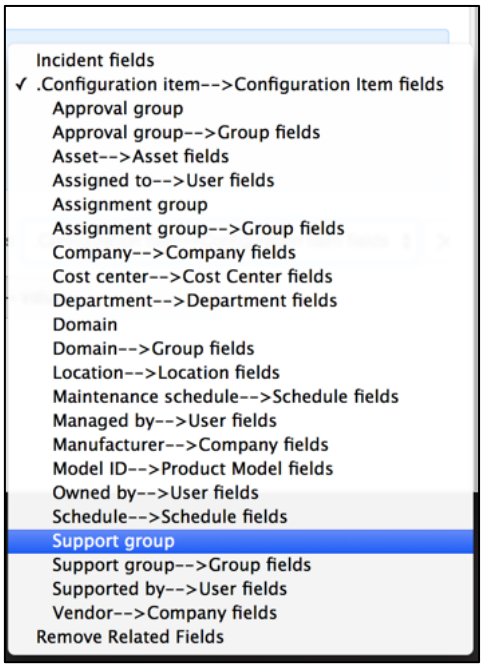
NOTE: By selecting Show Related Fields, you now have access to fields on other records. This is known as Dot-Walking

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

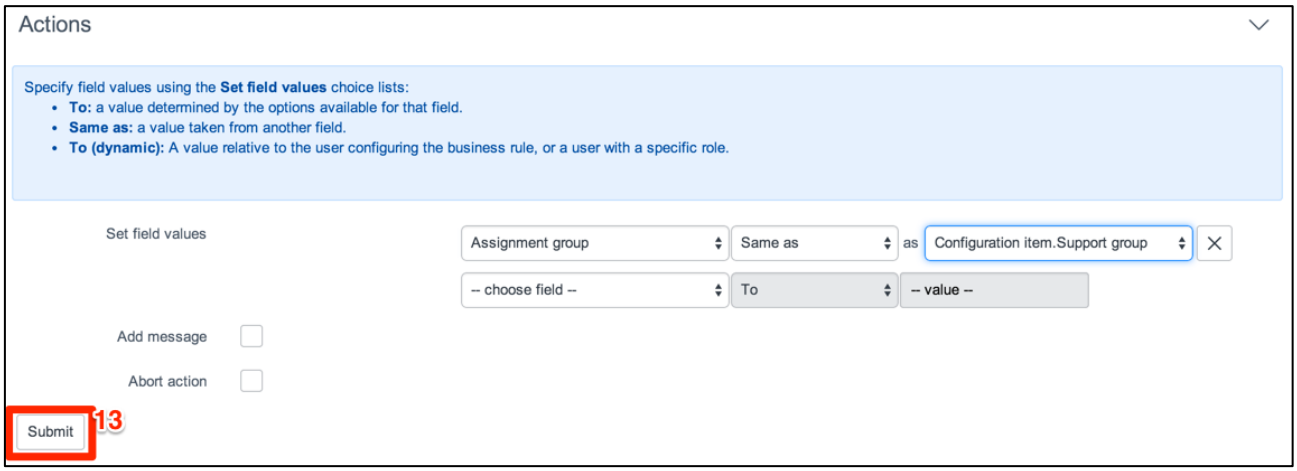


12. Click the same selection box again and select Support Group.



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13. Click Submit.



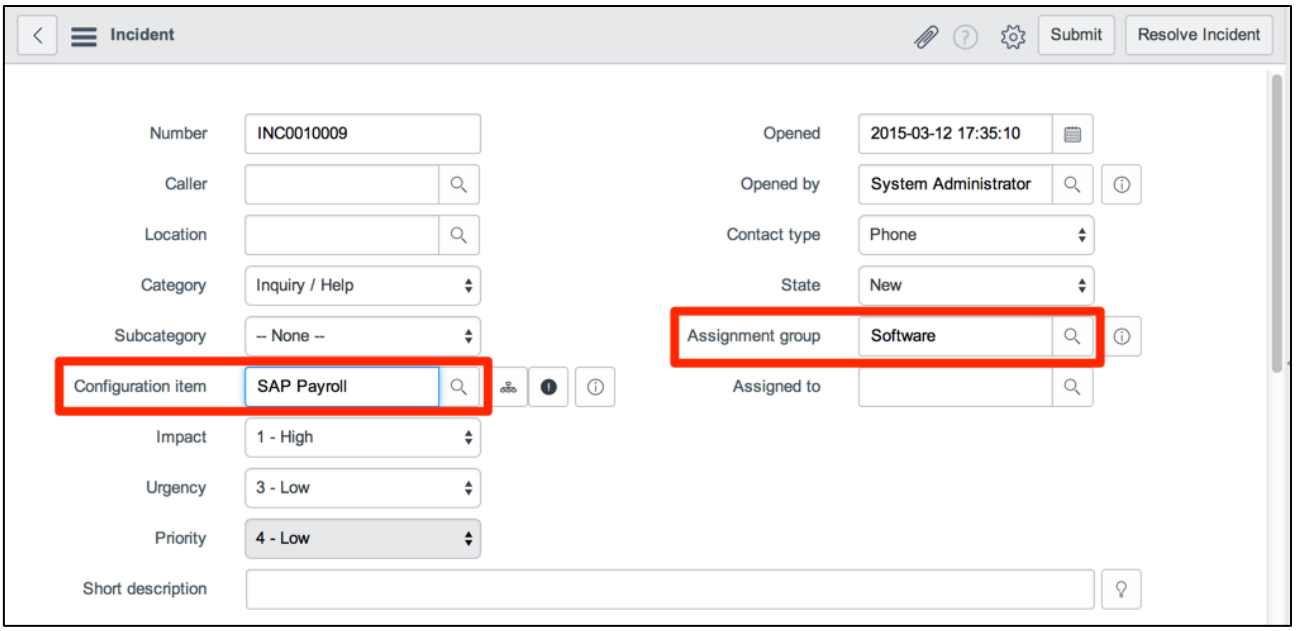
14. Click the same selection box again and select

Lab Success Verification

1. Create a new incident, and set the Configuration Item to **SAP Payroll**.

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

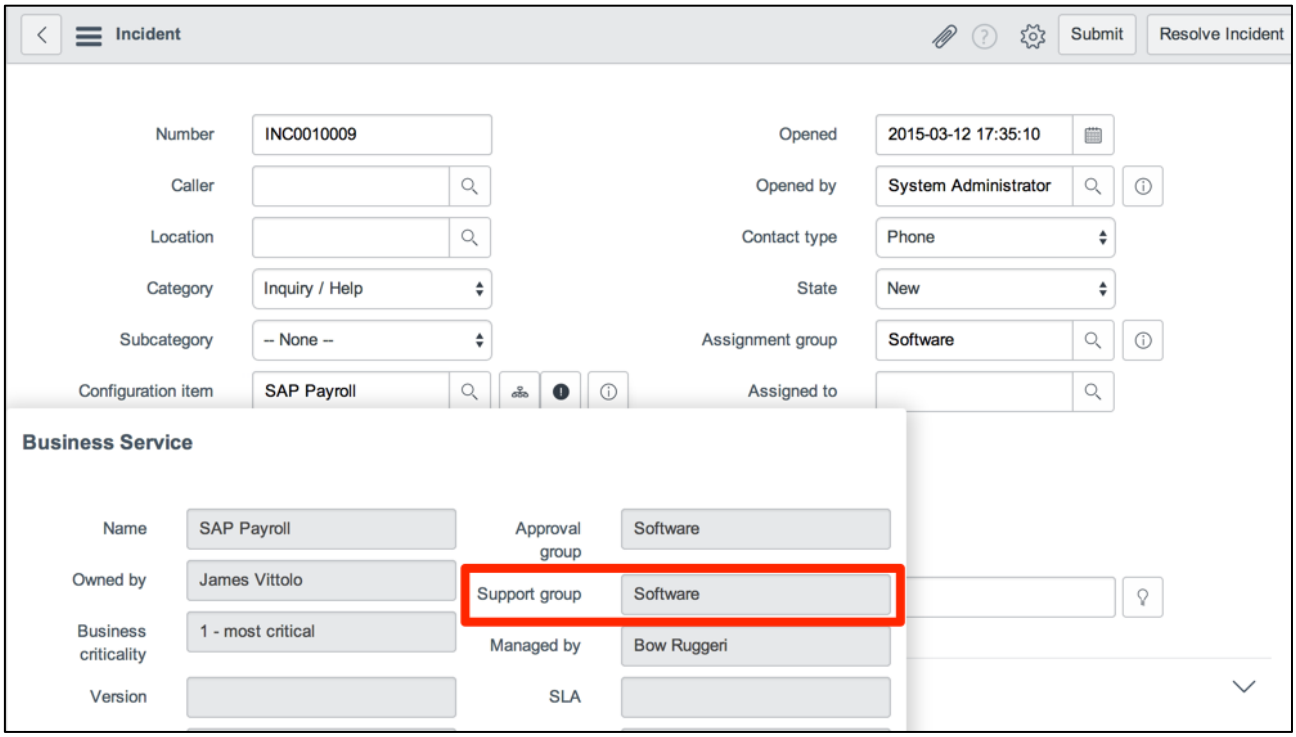
Note: The Assignment Group changes to **Software**.



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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.**



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

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