ServiceNow Training

Phase 1: August Release

August 2016

Introductions

- Rachel Manongdo, Communications Specialist, UIT
- Vesna Siracevska, Business Analyst, UIT
- Kiran Joshi, AS Tools Manager, UIT

Key Dates and Context

- **February 2016:** Incident and request (lite) management for UIT services provided to the hospital
- **July 18 – Aug. 4**: UAT (user acceptance testing) for problem, change and knowledge management
- **July 27 – July 28**: User training on knowledge management
- **Aug. 1 – Aug. 25** : User training on problem, change, JIRA
- **Aug. 18-22**: Go-live
- **December 2016:** Client portal, mobile application, incident, non-billable requests, client-facing and internal knowledge articles

Agenda

Part 1 – Introduction to ServiceNow – Rachel

Part 2 – Problem Management

- Problem Management process at Stanford – Vesna
- ServiceNow environment – Rachel
- Challenge Lab – Students

Part 3 – Change Management

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Part 4 – JIRA – Kiran

- Overview of workflow integration change
- ServiceNow integration demo

ServiceNow User Interface

BASIC SYSTEM NAVIGATION AND PERSONALIZATION

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Background

- ServiceNow manages the workflow for requests for service

- Key roles:
  - **End-User:** Someone who uses the system for Self-Service. They are not a licensed user and have limited access to the system.
  - **Fulfiller**: Someone who uses the system to fulfill requests/needs. They are a licensed user and have access to their fulfillment areas.
  - **Approver**: Someone who approves requests sent to them
  - **Administrator:** Configures and manages system-wide settings

- Your role in the system will dictate what you are able to see when you login to ServiceNow

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ServiceNow UI Demo Topics

- Screen elements:
  - Banner frame
  - Application Navigator
  - Content Frame
- User Settings
- Applications and Modules
- Application Navigator Filter
- Favorites
- Lists and personalization
- Search
- Filters
- Bookmarks
- Breadcrumbs
- Forms
  - Field types
  - Field icons
  - Form sections
  - Related lists and links
- Right-click functions

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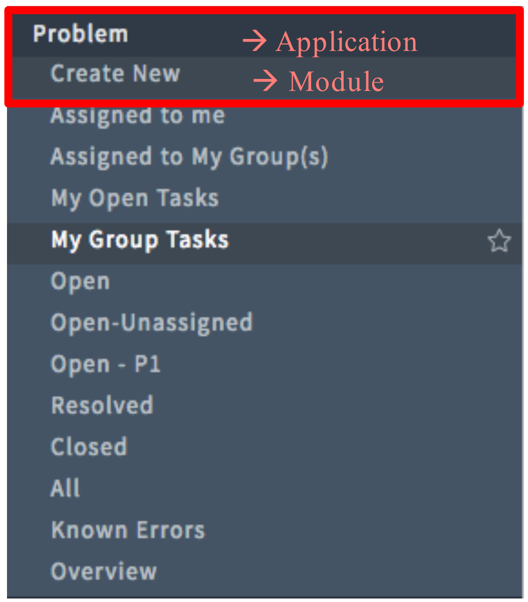
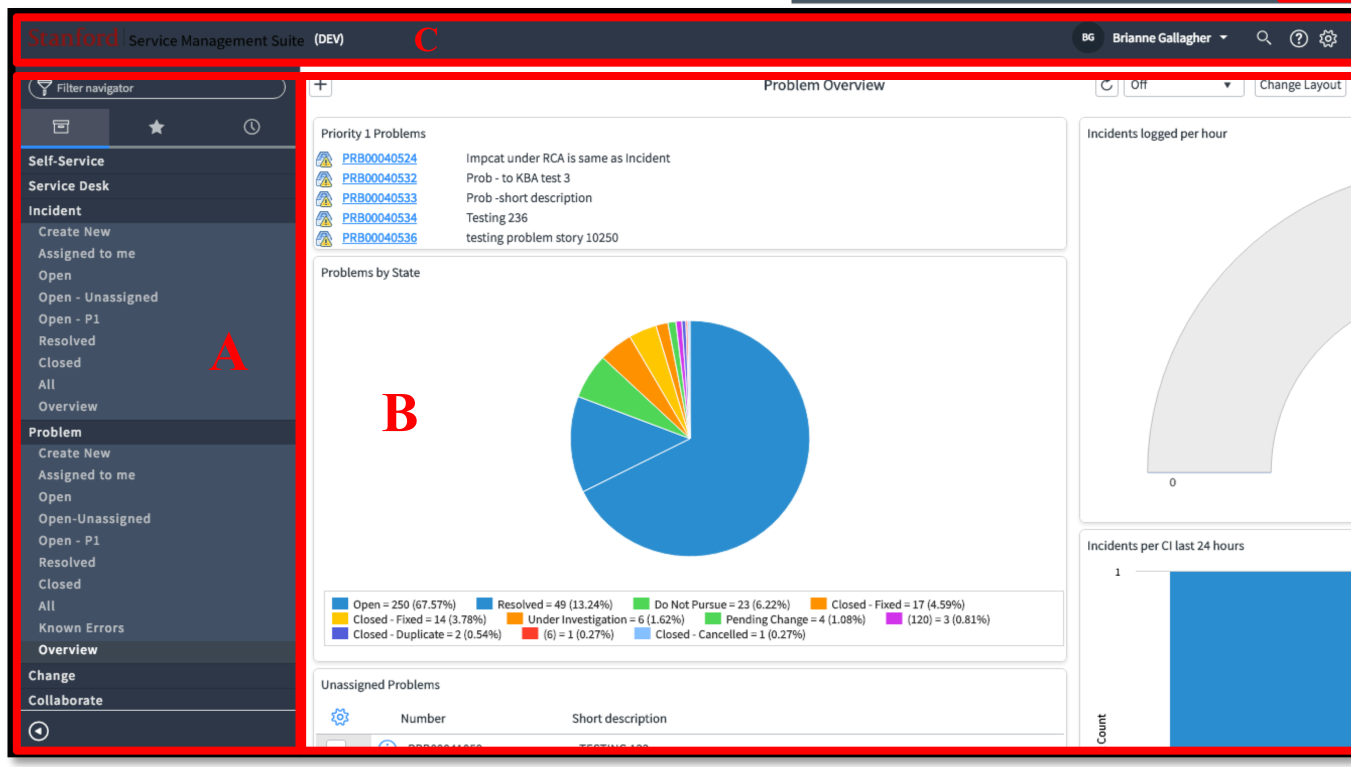
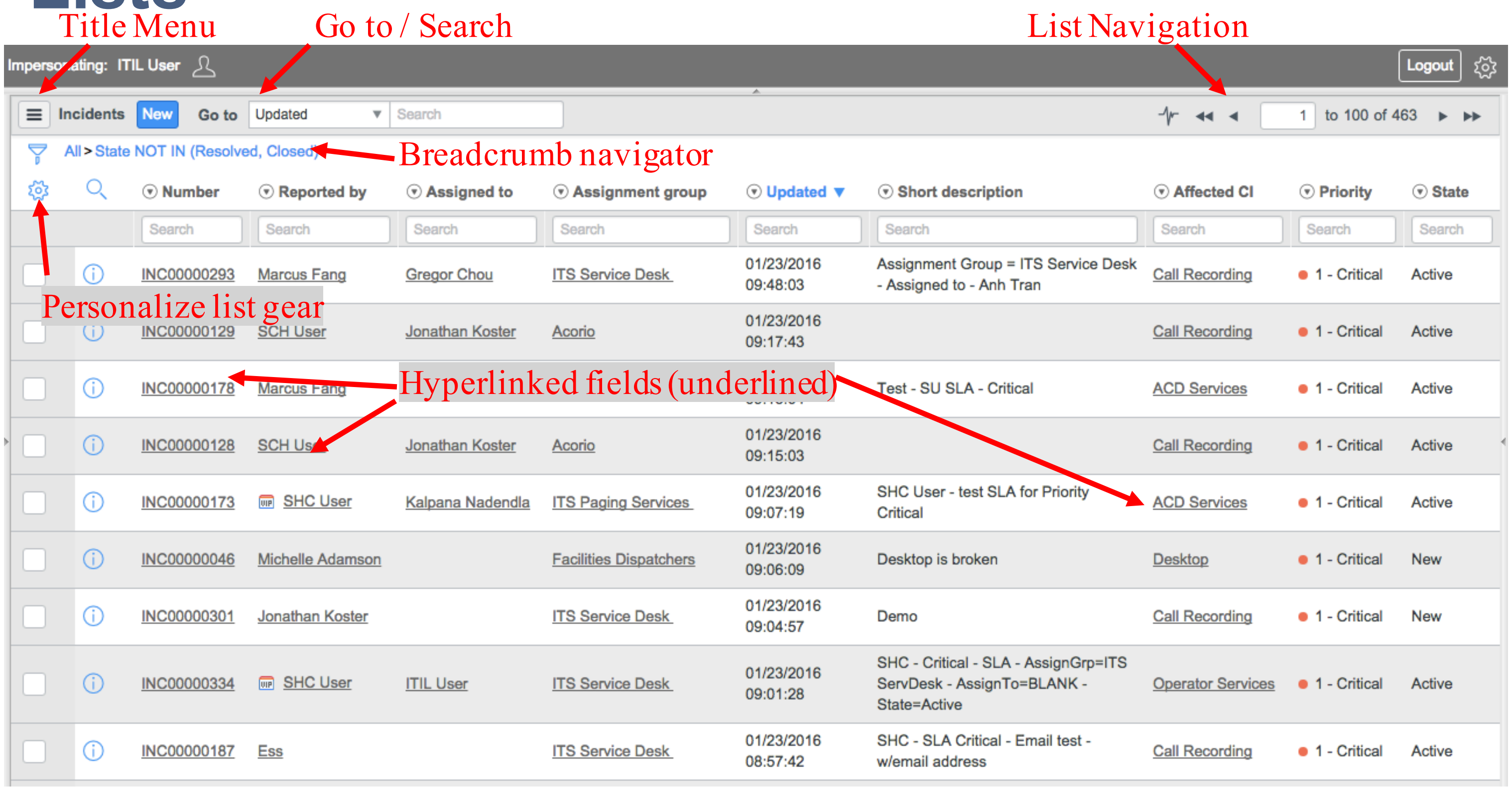
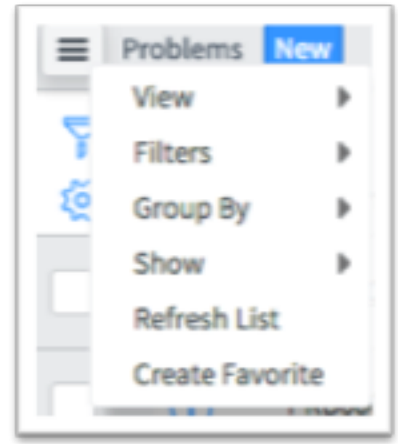
Screen Elements





Lists





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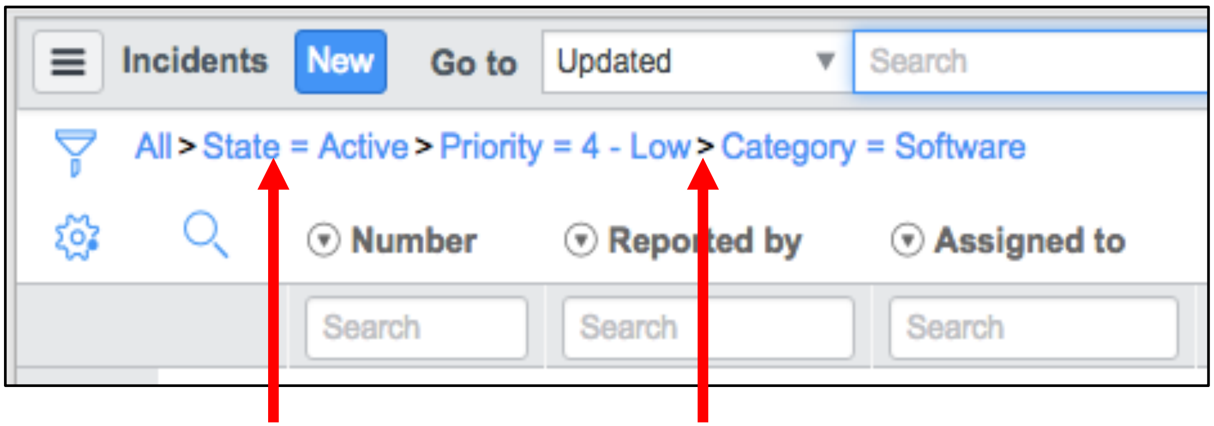
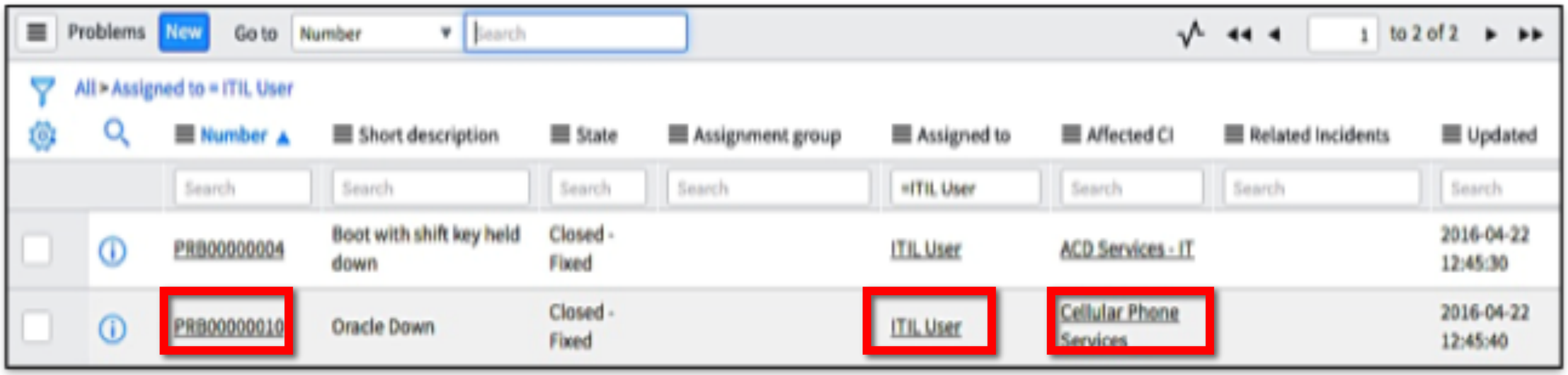
Breadcrumbs



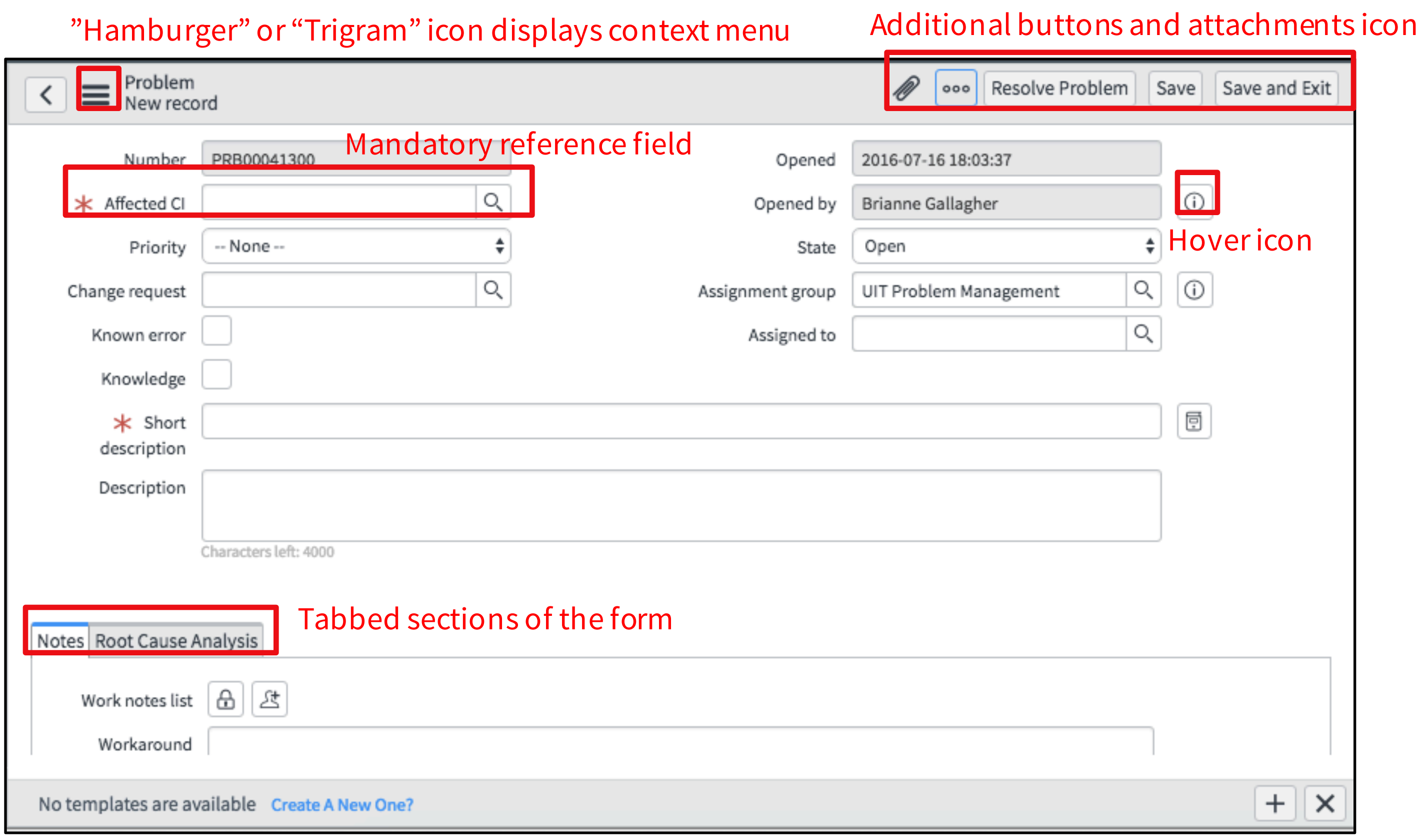
Click a breadcrumb to remove all conditions after it from your filter

Click on the ">" sign to remove just the condition "Category = Software"

Reference fields



Forms



"Hamburger" or "Trigram" icon displays context menu
Additional buttons and attachments icon
Problem
New record
Resolve Problem
Save
Save and Exit
Mandatory reference field
Number
PRB00041300
Affected CI
Opened
2016-07-16 18:03:37
Opened by
Brianne Gallagher
Hover icon
Priority
-- None --
State
Open
Change request
Assignment group
UIT Problem Management
Known error
Assigned to
Knowledge
Short description
Description
Characters left: 4000
Tabbed sections of the form
Notes
Root Cause Analysis
Work notes list
Workaround
No templates are available
Create A New One?

Navigation Challenge Lab

1. Create a filter for all **Open – P1** problems that have no **Assigned to** filled in. Save it with a name of **Unassigned P1 Problems**.

2. Create a **new favorite** to show all active Problems opened in the last week and assigned to one of your groups. After you create the favorite, **rename** it "New Problems – My Group".

3. Personalize the Problem list to add **Updated** field in between **State** and **Assignment group** fields.

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Problem Management

CREATE AND DOCUMENT A PROBLEM

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ServiceNow Problem Topics

- Key roles
- Problem application & modules
- Creating new problem records
- Problem fields
- Problem States
- Assignment
- Process Flow
- Known Errors
- Root Cause Analysis
- Notifications

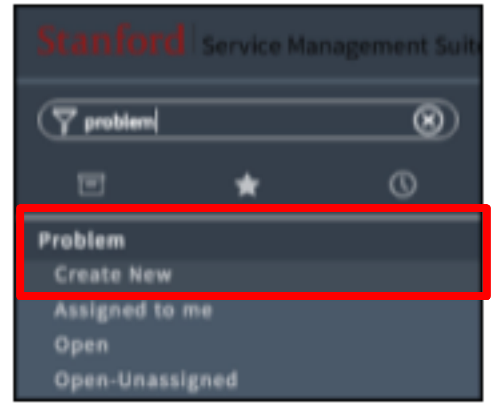
When/How to Create a Problem

- **When:**
  - Incident Support has identified a trend in incidents
  - Incident Support has identified a Priority 1 incident
  - Problem monitoring has identified potential problem

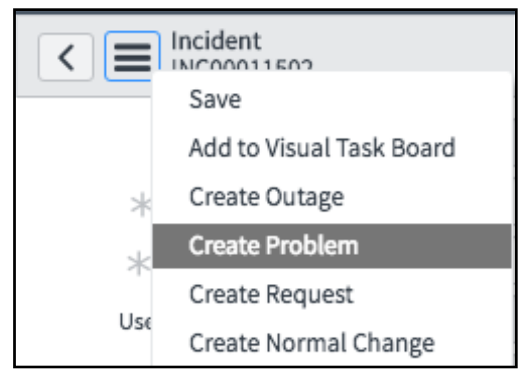
- **How:**
  - (A) Create a problem directly from module
  - (B) Create a problem from an incident**

    (*available with December 2016 release*)

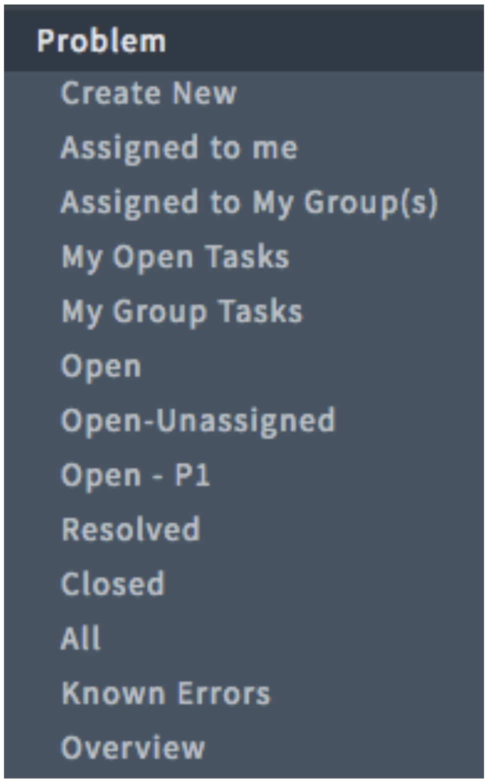
A



B

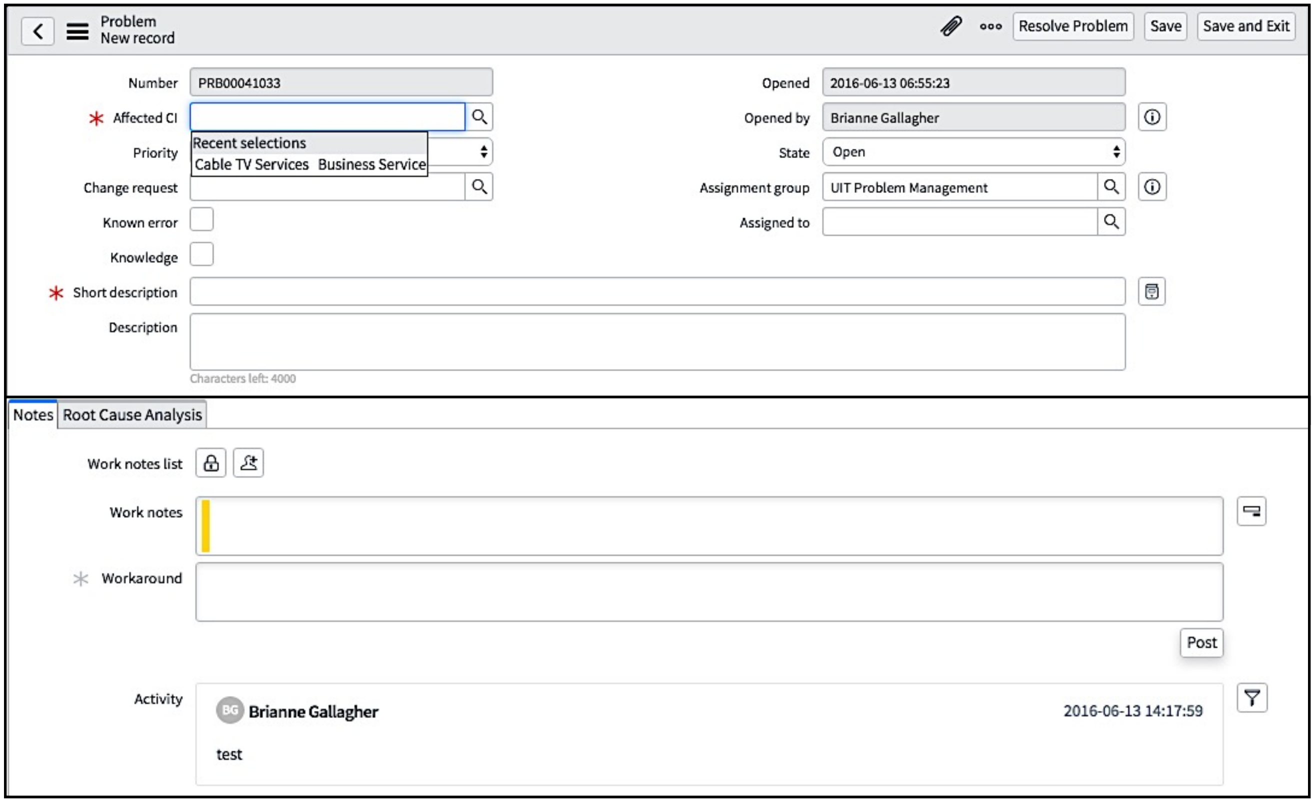


Other Problem Modules



- Use **modules** to see Problems and Problem Tasks assigned to you and your Groups
- See all **Open** and **Open – Unassigned** Problems
- **Known Errors** (problems with known root cause)
- **Overview** page for Problem reports

Documenting a Problem



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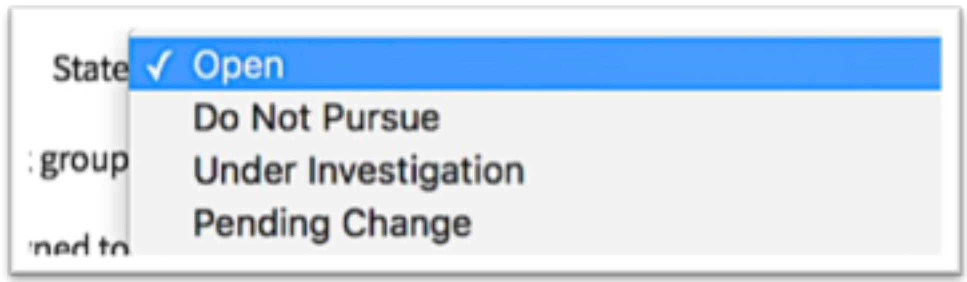
Problem States

- Open
- Do Not Pursue
- Under Investigation
- Pending Change
- Resolved
- *Closed – Fixed**
- *Closed – Cancelled**
- *Closed – Duplicate**



Only Problem Management group members may set Problem record to a* *"Closed"*** *state.*

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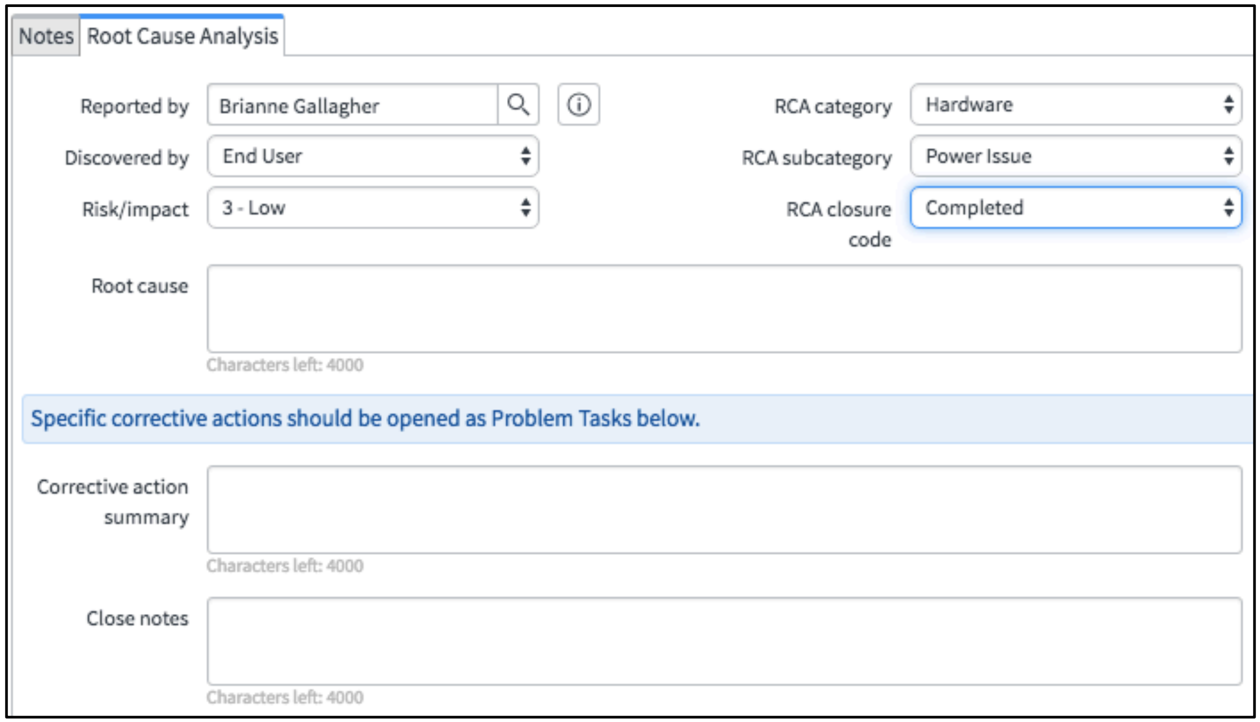
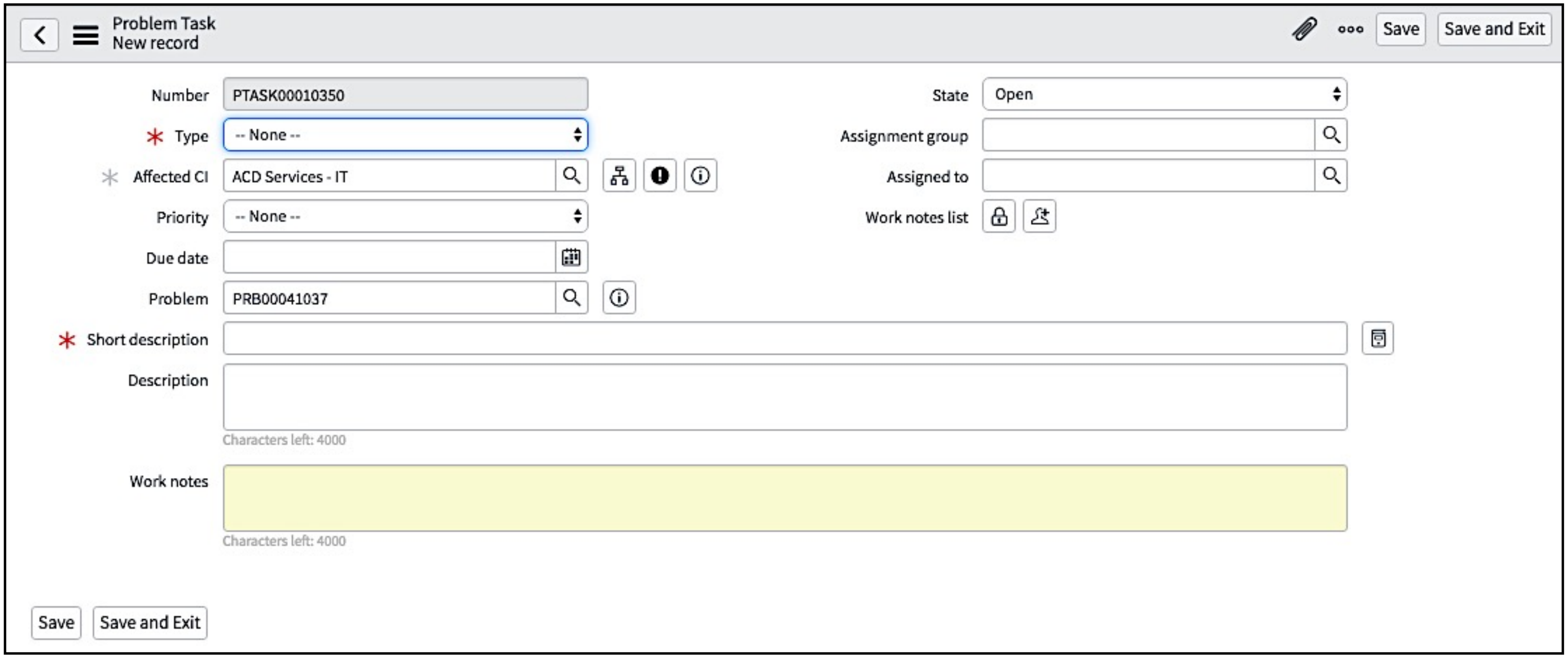
Root Cause Analysis**

- Prevent a problem from recurring by identifying the “root cause”
- One corrective action may not always be sufficient

- ***Problem records should be updated by the* ***Assigned To*** *prior to review meetings*



Creating Problem Tasks



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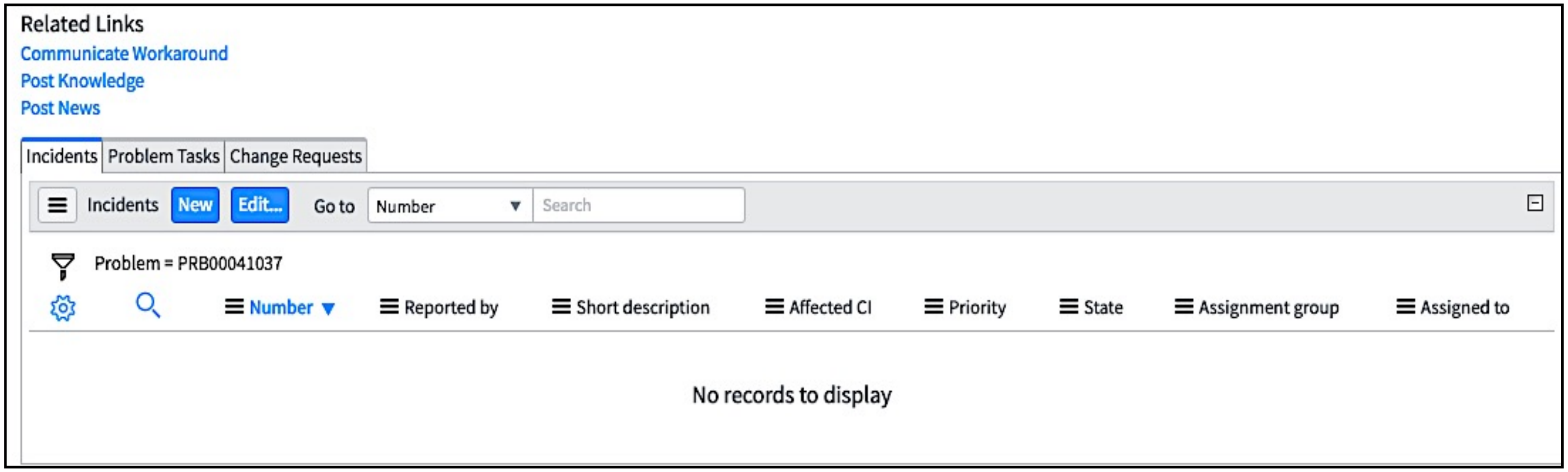
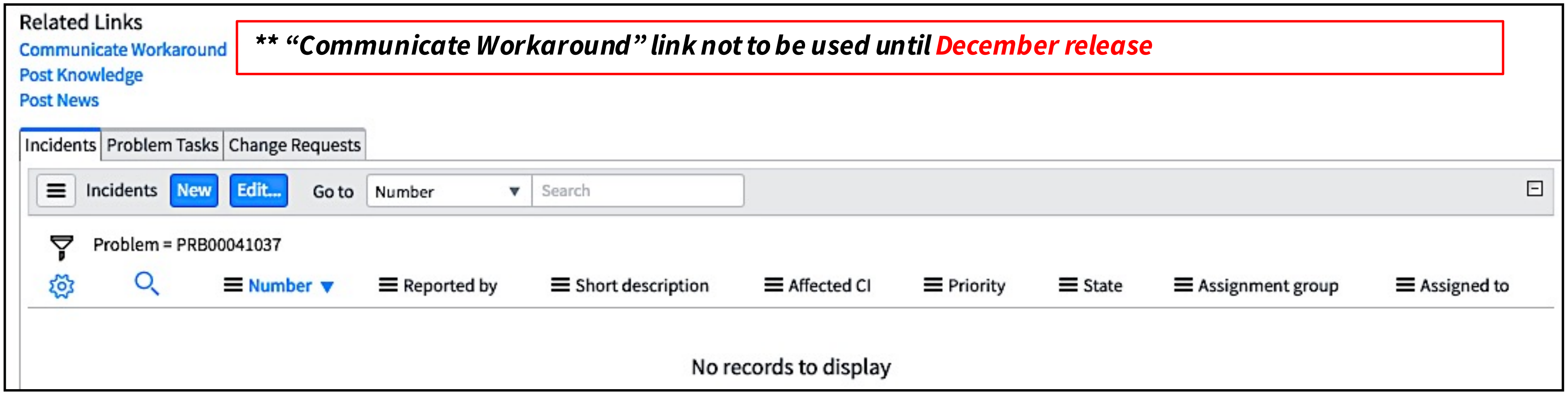
Related Links

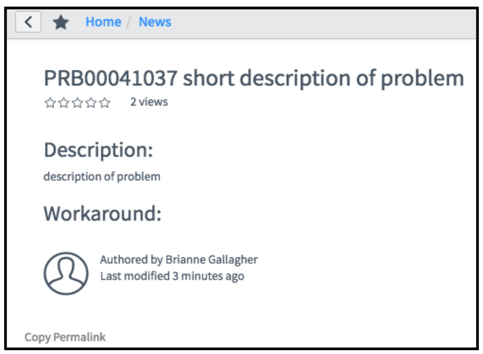


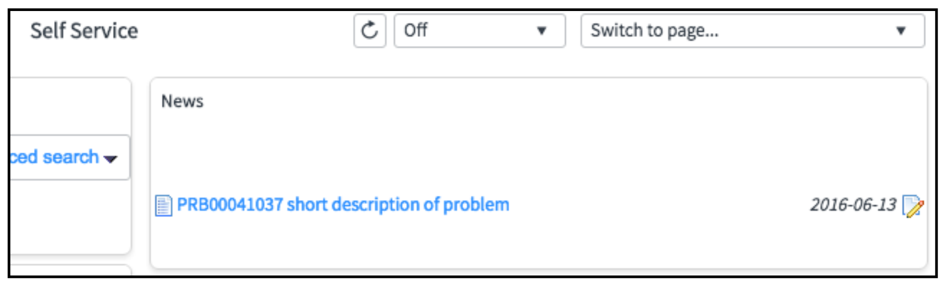
***** "Communicate Workaround" link not to be used until December release***

Creating a Knowledge Article from a Problem

** *"Communicate Workaround" link not to be used until December release*



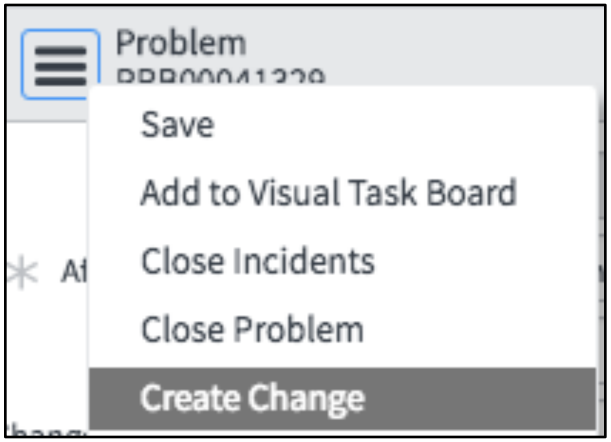




Creating a Normal Change from a Problem

Inherited by Change:

- Short description
- Affected CI
- Assignment group
- Assigned To
- Link to Problem record



Email Notifications

Notification Trigger	Sent To
Problem created against CI you own	Service Owner (Owned By) of Affected CI
Problem created or Problem has been assigned to an Assignment Group	Problem Manager Group or Assignment Group
Problem has been assigned to you	Assignee
Work note added to a problem	Assignee (if he/she didn't add note); Assignment Group, Work Notes List
Problem Task assigned to a particular group	Assignment Group
Problem task has been assigned to you	Assignee
Problem Task work noted	Assignee
Work note added to a problem task without an Assigned To.	Assignment Group
Problem State changes to Resolved	UIT Problem Management group
Problem state is to "Do Not Pursue" and is newly associated with an Incident	Assigned to or Assignment group (if no assigned to)
When Critical Incidents, Problems and/or Emergency Changes are logged against a CI	CI Subscriber

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Problem Challenge Lab

1. Create a new Problem record, fill in the mandatory fields, and **save the record**.

2. Fill in the **Root Cause Analysis** tab. Document example steps for Corrective Action Summary.

3. For each step in the Corrective Action Summary, open and assign a **Problem Task**.

4. Find all **unassigned** Problems belonging to **your group** and **assign** a Problem to yourself.

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Change Management

CREATE AND DOCUMENT CHANGE REQUESTS

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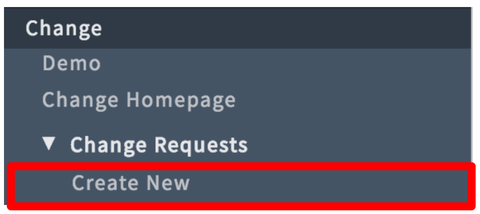
ServiceNow Change Management Demo Topics

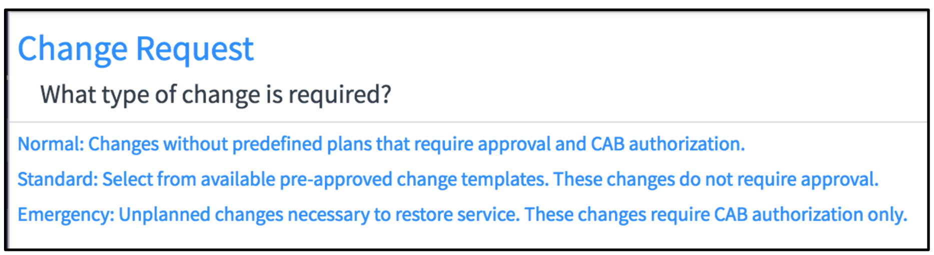
- Roles
- ITIL background
- Types of Changes
- Creating new Changes
- Process overview
- Change modules/applications
- Change form/fields
- Notifications
- Approvals
- Delegation

When to Create a new Change

When:

- There is an addition, modification or removal of anything that will affect Production environments and/or IT services



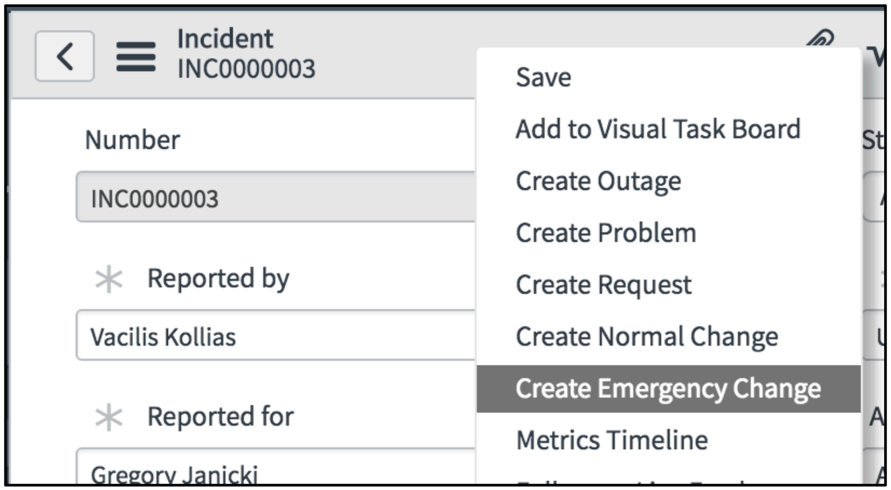


How:

- Create a Change from a **Problem**
- Create a Change from the **Change application**
- Create an Emergency Change from a Priority 1 incident** (only option for Emergency Changes with December 2016 release)

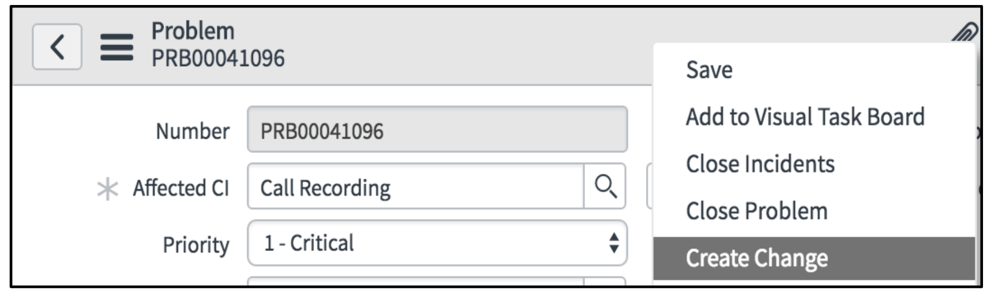
Creating a Change, cont.

From an incident:

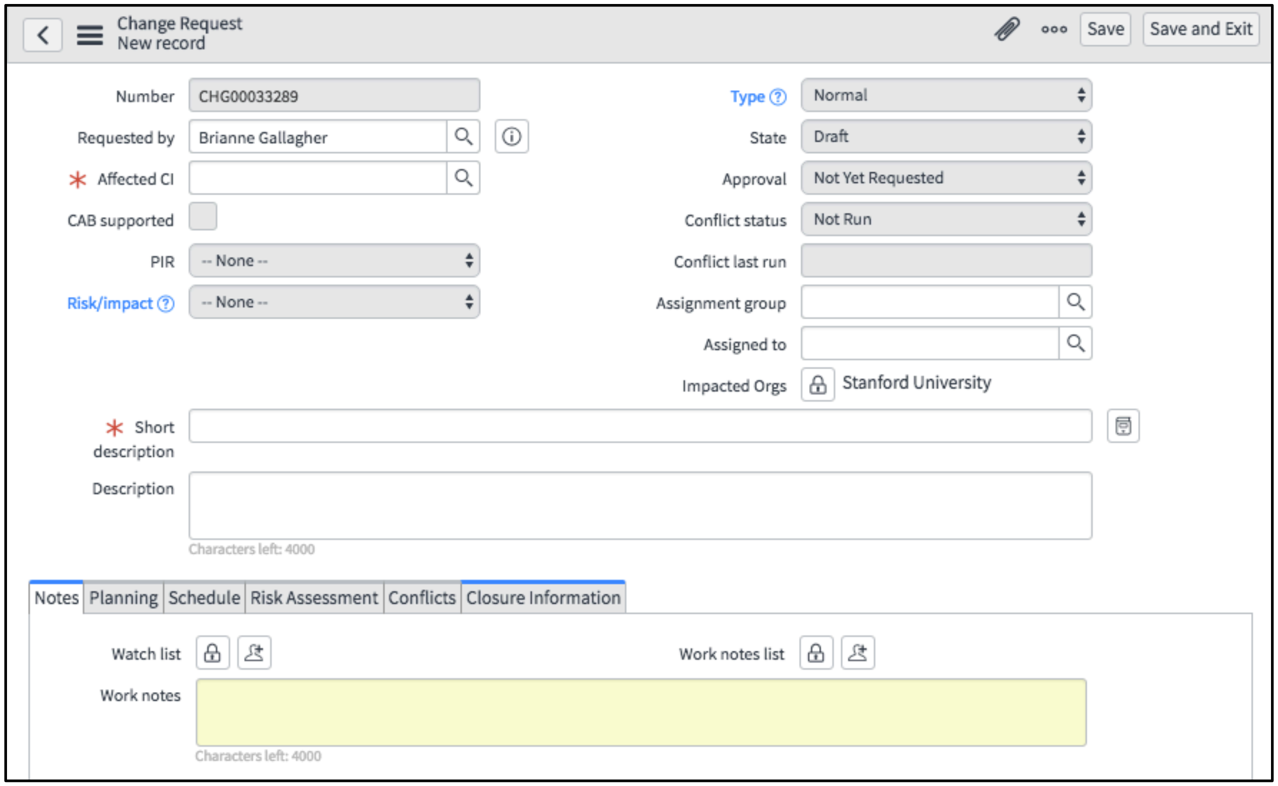


**With the December 2016 release, the only way to create an Emergency Change will be from a P1 incident

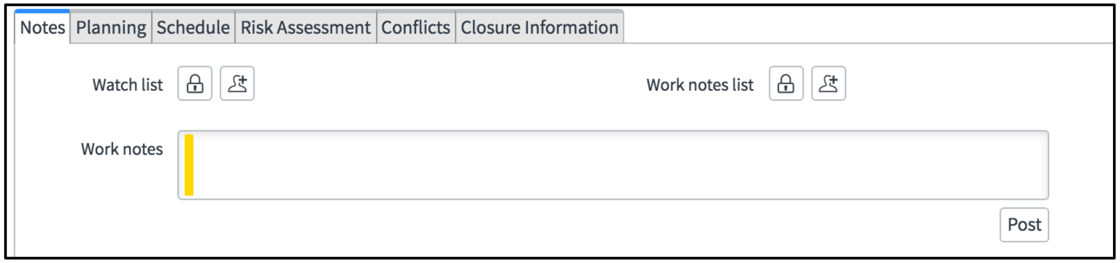
From a problem:

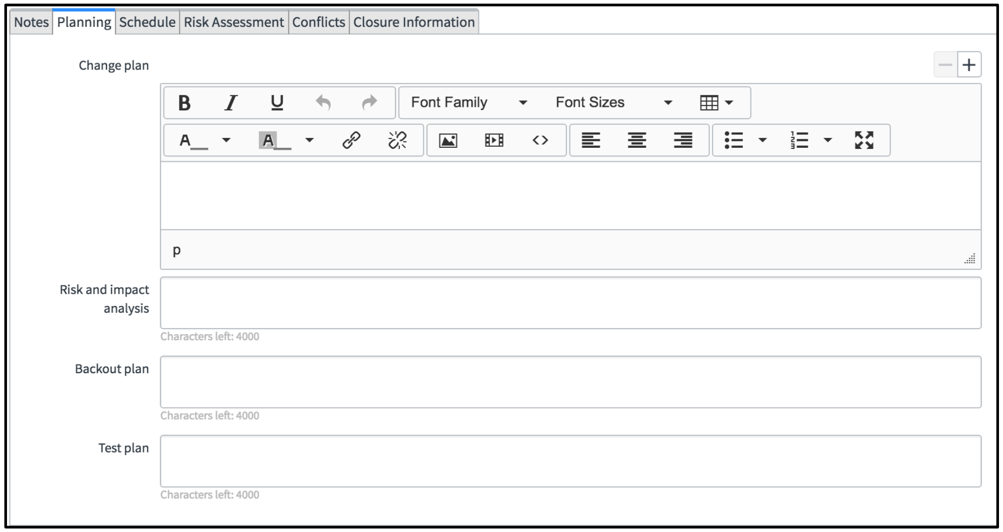


Normal Change Walk Through



Notes and Planning Tabs





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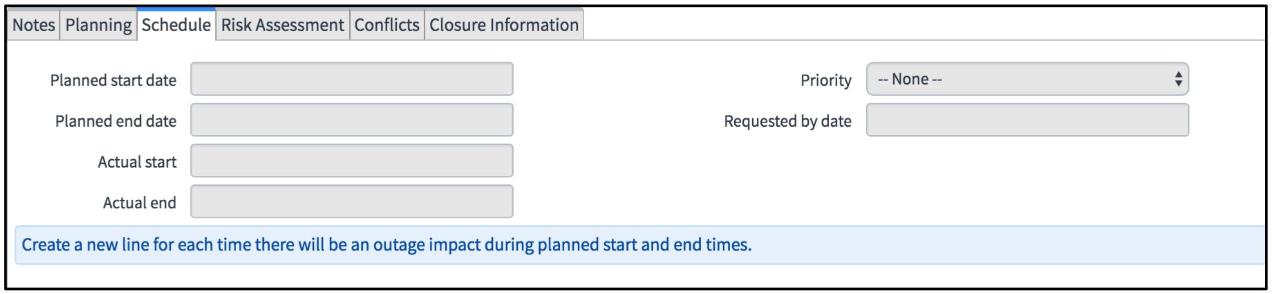
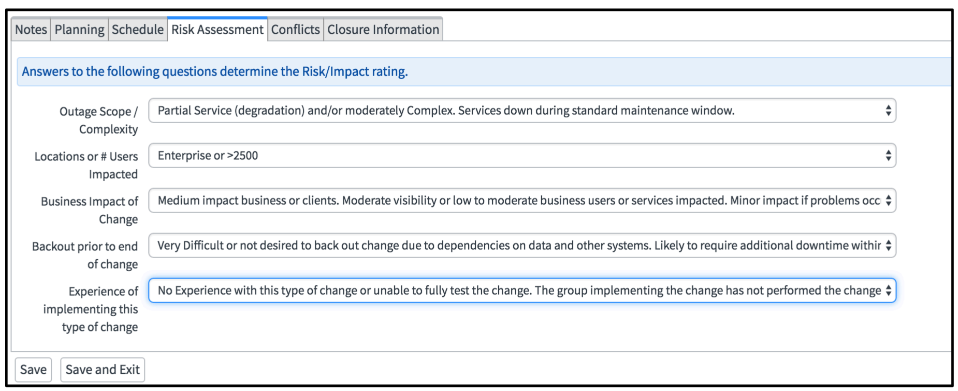
Schedule and Risk Tabs





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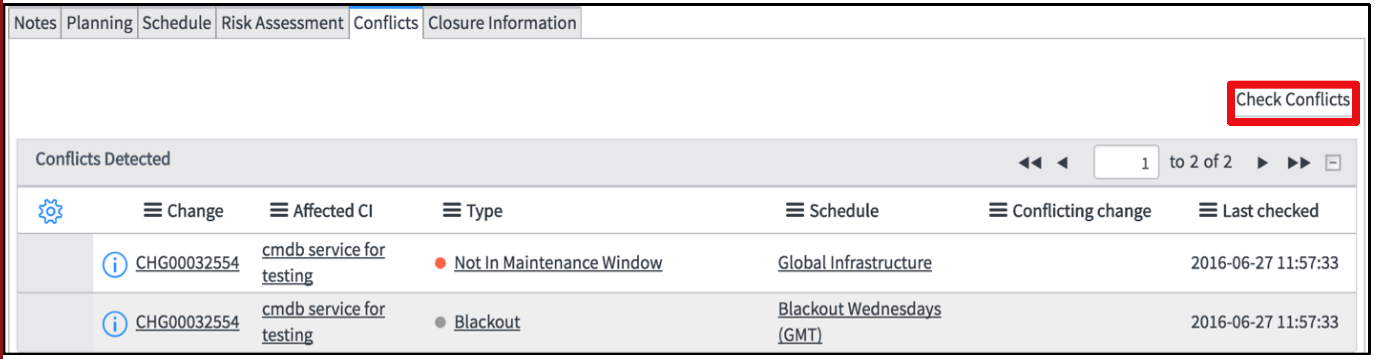
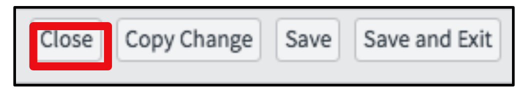
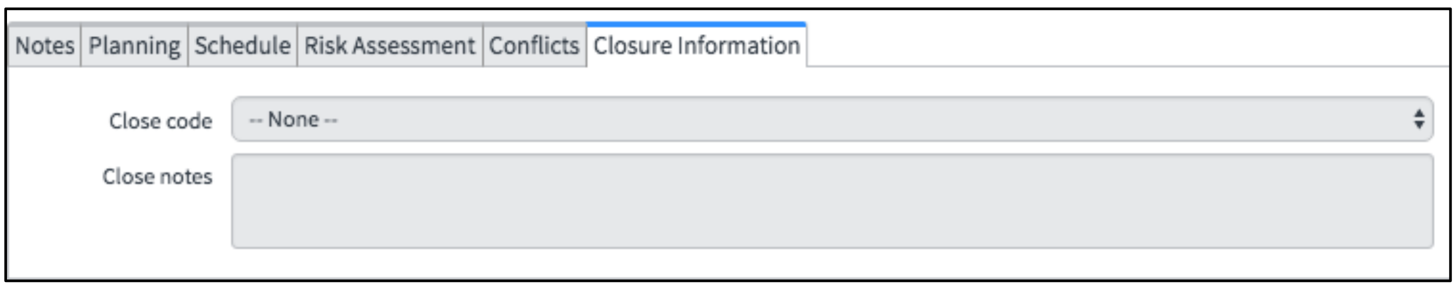
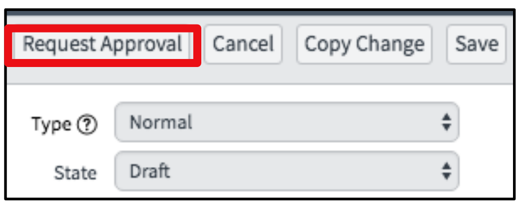
Conflicts and Closure Information Tabs

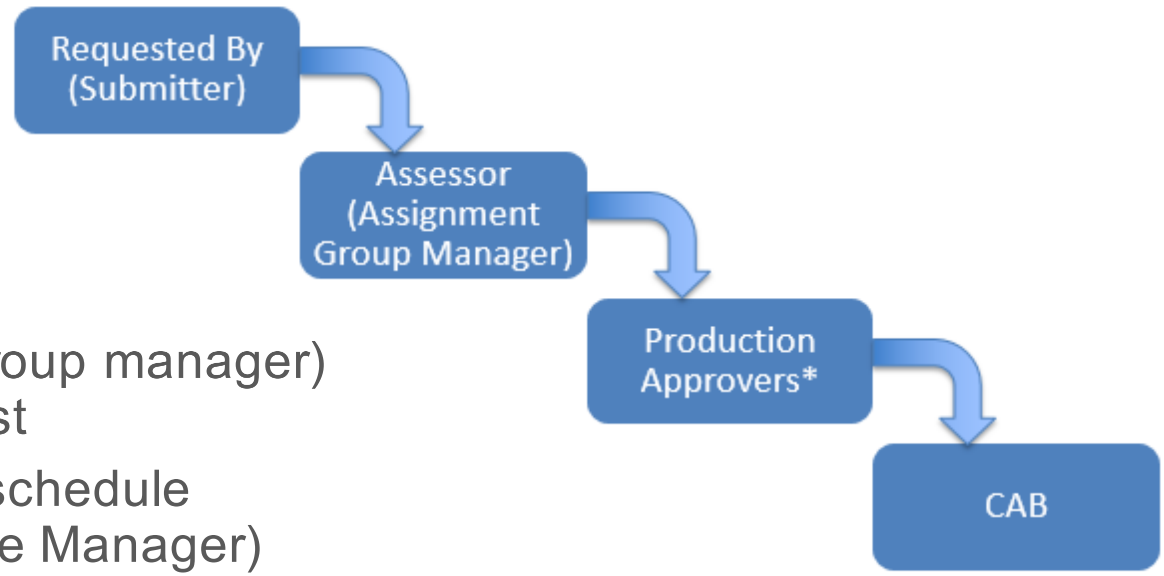






Assessment and Approvals

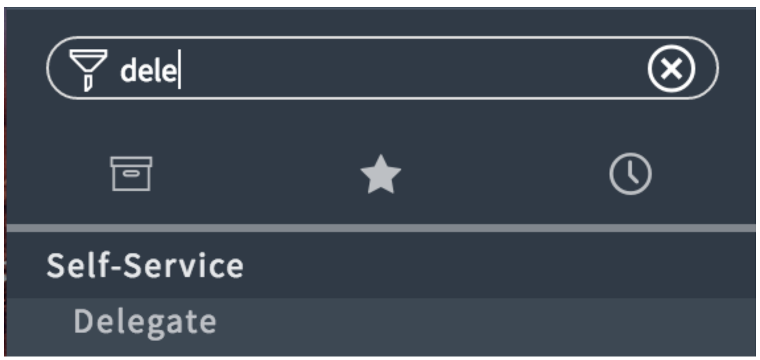


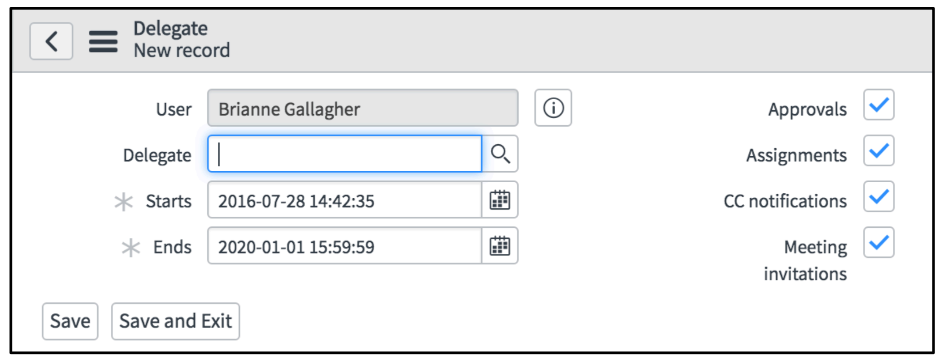


- **Assessor** (Assignment group manager) authorizes Change request
- **Approvers** approve and schedule request (CI owner, Change Manager)
- **all conflicts must be resolved prior to approval

Delegation of Approvals/Assignments

- For times you are away from work, you can set up another user to receive **notifications** for you, **approve** requests for you, and handle **assignments** for you



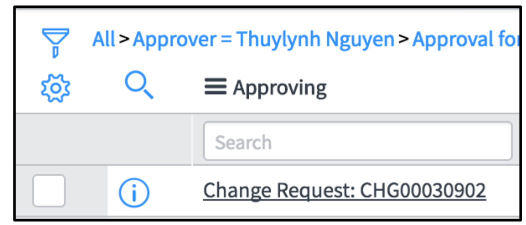


Approving Changes

- Can be done by email
- Can be done within ServiceNow (comments will be necessary if rejected)

1

2



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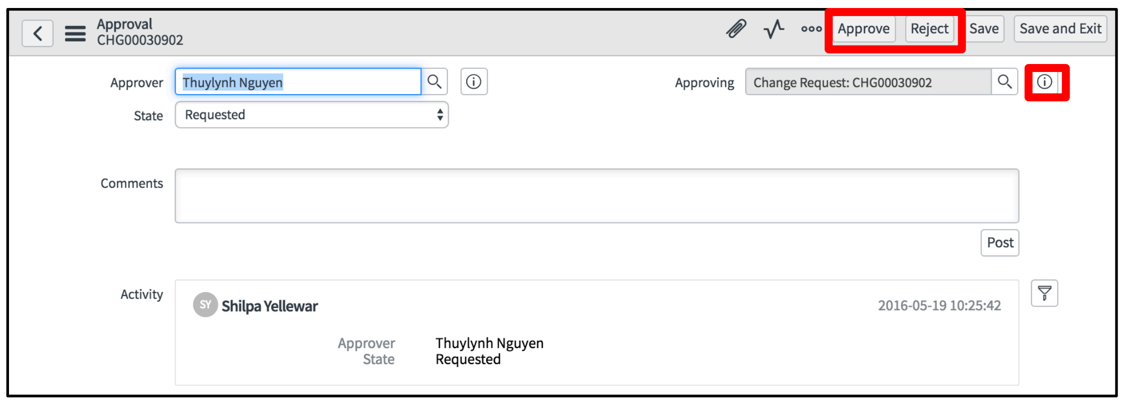
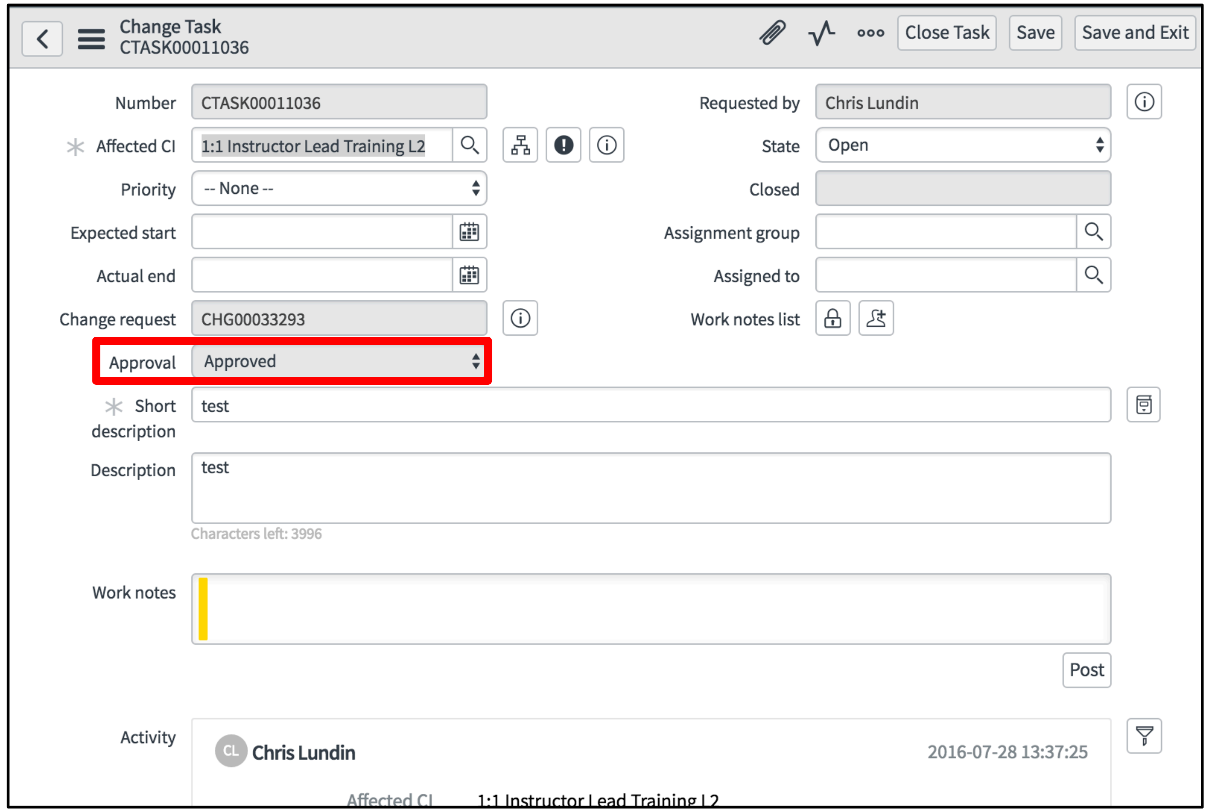


Change Tasks

The change should be approved **before** work is done on the task.

The Approval field indicates The status of the parent change request.

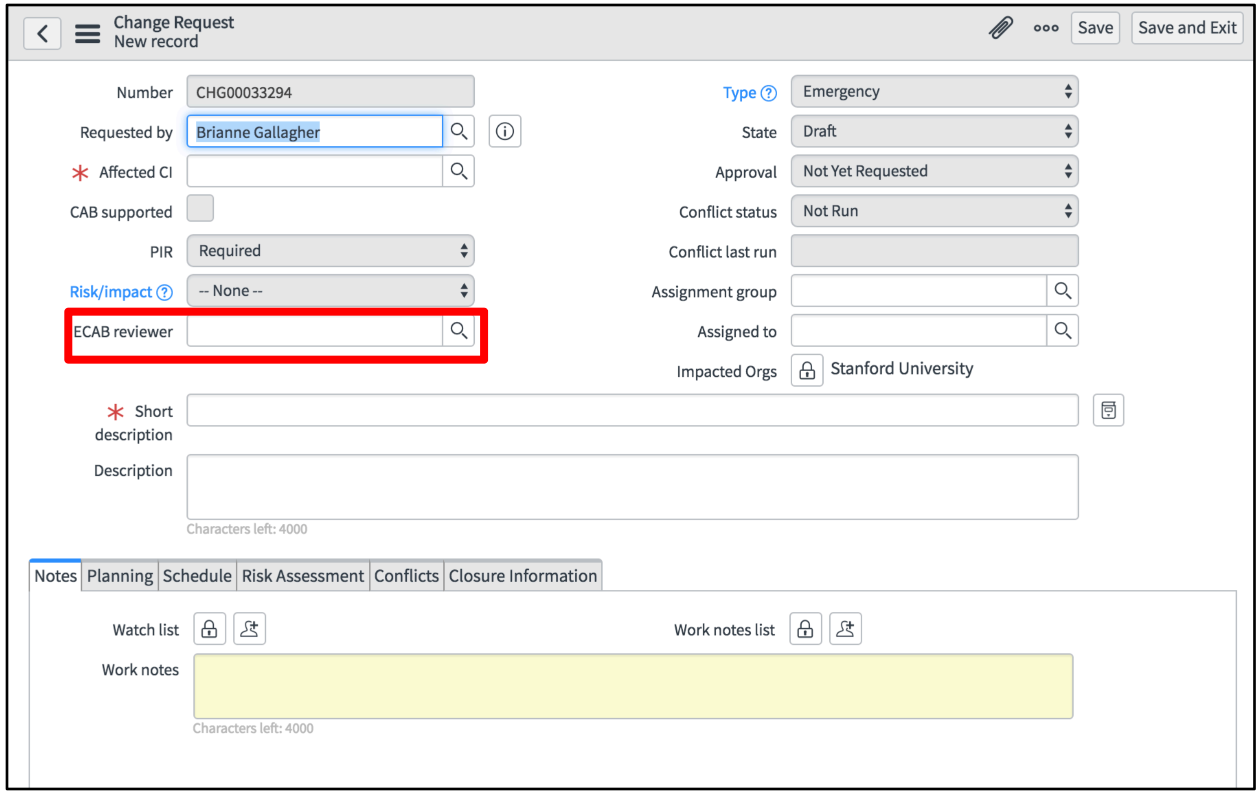


Emergency Change form

ECAB Reviewer will be your Director.

These changes are created due to **P1** incidents.

Approvers: Assignment Group Manager and ECAB reviewer



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Requesting a new Standard Change Template

1

Interceptor

Change Request

What type of change is required?

Normal: Changes without predefined plans that require approval and CAB authorization.

Standard: Select from available pre-approved change templates. These changes do not require approval.

Informational: Create a change for information purposes only.

Emergency: Unplanned changes necessary to restore service. These changes require CAB authorization only.

2

Template Management

Propose a new Standard Change Template. Modify or Retire an existing Standard Change Template.

3

Template Management

Propose a new Standard Change Template. Modify or Retire an existing Standard Change Template.

Items

Propose a new Standard Change Template

▼ Preview

Standard Changes are those with repeatable implementation steps that have a proven history of success and are considered by Change Management to be low risk. Use this request to propose a Standard Change for your Change Management team to confirm.

Service Catalog > Standard Changes > CI Management

Modify a Standard Change Template

▼ Preview

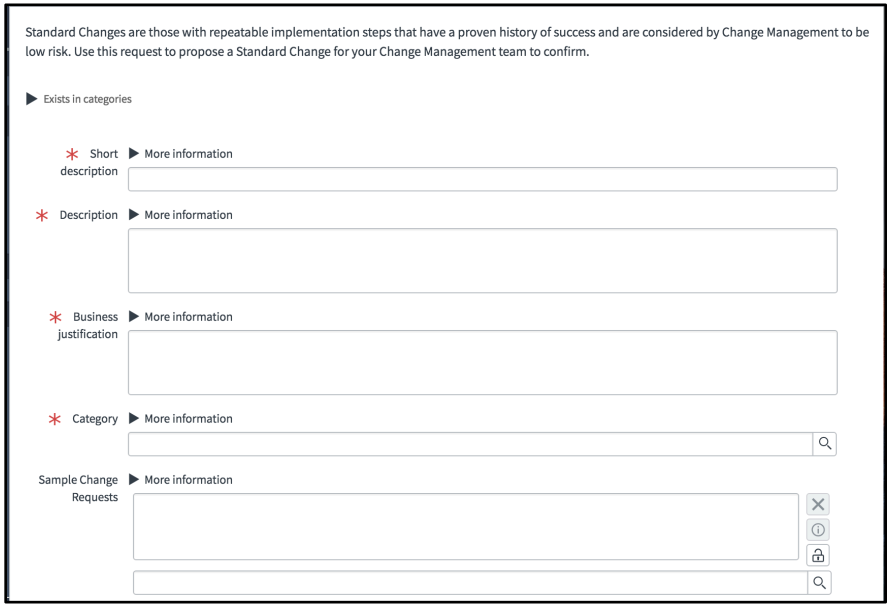
Request alterations to an existing Standard Change Template. These changes will be confirmed by your Change Management team.

Retire a Standard Change Template

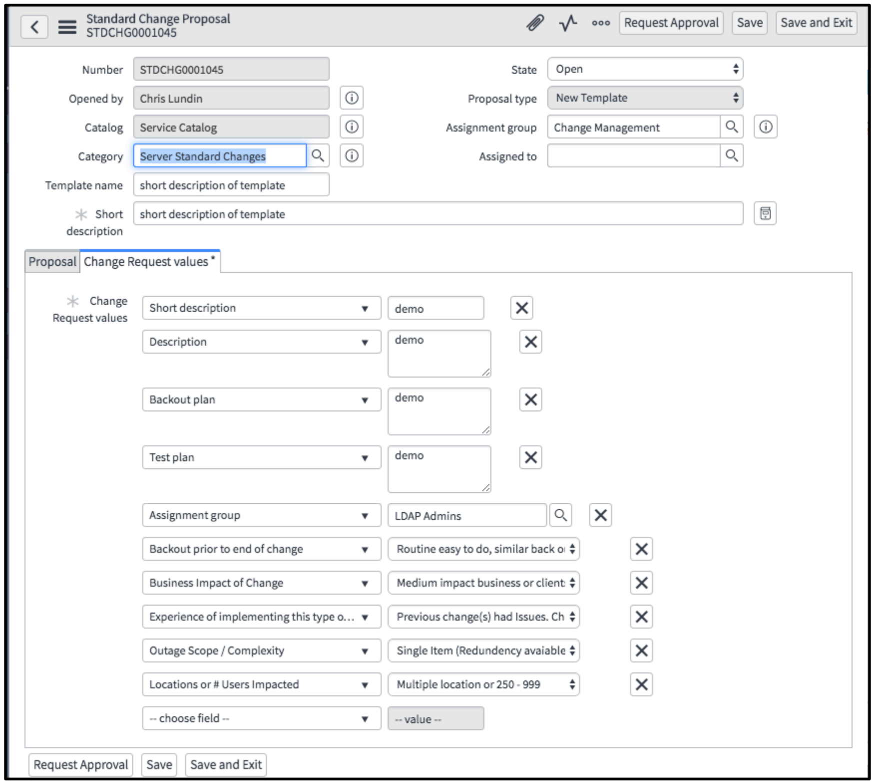
▼ Preview

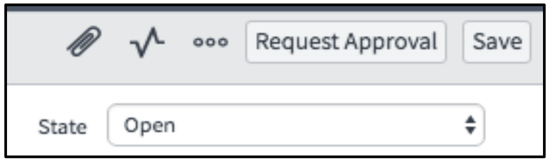
Request an existing Standard Change Template is made unavailable when it is no longer required or no longer acceptable as a Standard Change. This will be confirmed by your Change Management team.

Fill in the details of the new template



Save your template and request approval





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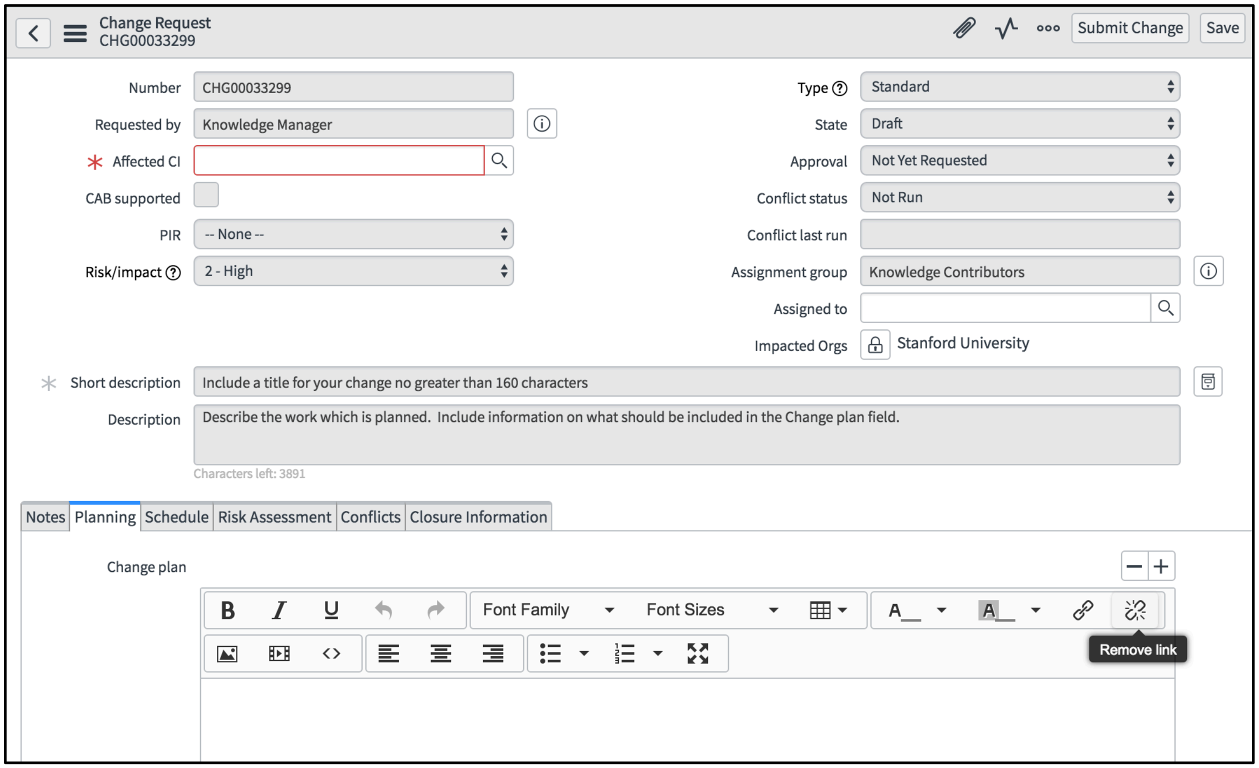
Requesting a Standard Change



Change Notifications

Notification Triggers	Sent To
A Change Request of any type requires approval	Change Approver
A Change Request of any type has been approved	Assigned To, Change Management Group
A Change Request of any type has been rejected	Assigned To, Change Management Group
A Change Request affecting a Configuration Item I subscribe to has been approved	CI Subscriber
When an Emergency Change request moves to Assessment State	Change Management Group & CAB
When a Change Request of any type has been fully approved	Change Management Group
A Change Request has been assigned to you	Assigned To
A Change Request has been assigned to your group	Assignment Group
A Change Task has been assigned to you	Assigned To
A Change Task has been assigned to your group	Assignment Group
A Change Request has been canceled	Assigned To, Change Management Group
A Change Task has been work noted (but not to Assigned To if Assigned To made the work note update)	Assigned To, Work notes list
An unassigned Change Task has been work noted	Assignment Group, Work notes list
Change Task Canceled	Assigned To
A Change Request has been work noted noted (but not to Assigned To if Assigned To made the work note update)	Assigned To, Work notes list
An unassigned Change Request has been work noted	Assignment Group, Work notes list
Standard Change proposal approved	Change Management Group
Standard Change proposal rejected	Change Management Group
Change Request has been withdrawn	Change Approvers
Change has been set to Expedited	Assigned To

Challenge Lab - Change

1. Create a high-risk, **Normal** change from the application navigator. Assign the change to yourself and one of your groups. Create two **Change Tasks** and then save the change.

2. Check to see if there are any conflicts with your Change.

3. Request **approval** for the Change and identify the approver.

4. Create a **new Problem** record. Create a **new Normal Change** from the Problem.

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JIRA Integration

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ServiceNow Support

You can submit an incident ticket directly in ServiceNow that will go immediately to our support team. To enter an issue, question, or request related to one of the new ServiceNow processes:

1. Log in to ServiceNow.
2. On the **Navigation** menu (left column), click **Incident.** Other options are displayed.
3. Click **Create New**. A new Incident form is displayed.
4. In the **Affected CI** field, type “ServiceNow” or select it from the autofill list that appears.
5. In the **Short description** field, type your question or a brief description of the issue.
6. Click the **Notes** tab (middle of form).
7. In the **Additional Comments (Customer Visible)** field, type the details of the issue.
8. Click **Save and Exit**.

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For additional information

- User guides and slides are available at:
  - **https://uit.stanford.edu/service-management/servicenow**

- Consult the ServiceNow product documentation:
  - **https://docs.servicenow.com/**

Q&A