servicenow

Quick Guide

for Incident Fulfillers

HOW TO: Create an incident form

Incident forms can be assigned to you after they are created by a user (through the Services Portal) or by another fulfiller.

However, you will usually create an Incident from a New Call Record or from the Navigator (Incident > Create New). When doing so, you will need to complete the following fields. Mandatory fields are indicated by the *. If you don't know what should be in a field, you can search by clicking the 🔍 associated with the field.

* **Reported by** — Person who reported the problem

Reported for — Person for whom the problem was reported (if not the "Reported by" person)

* **Service** — Choose the category for this problem.

Risk/Impact — Usually the auto-populated content is accurate; only change if necessary.

Assignment Group — The support group associated with the Service category you selected

Assigned to — The fulfiller who fulfills the Incident. These options are limited by the Assignment Group selection.

Secure Incident – Click this if there is confidential information in the ticket.

KCS Solution — Search for knowledge articles associated with this problem, if necessary.

Contact type — Select how the problem was reported.

* **Short description** — Briefly describe the problem.

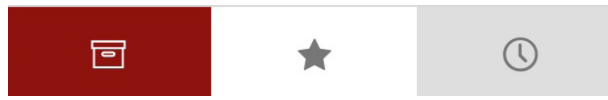
Additional Comments — Use this field to communicate with the person who reported the problem. Anything you put in this field is sent in an email to the reporter.

Work Notes — Use this field to make notes for yourself or other fulfillers who might access this ticket. The reporter will not see this content, unless they have fulfiller status in ServiceNow.

Location tab — If the problem is occurring in a specific location, use the Location tab to specifiy those details.

HOW TO: Log a call

1. From the Navigator, click the Filing Box.



2. Open the Service Desk application and click **New Call**.
3. Complete the form.
   - If the call requires that an Incident form be completed, choose **Incident** for the Call type.
4. Click **Save**.
5. If the call requires that an Incident be created, click the **Incident number** that is provided for you at the top of the form. Complete the form.

HOW TO: Attach a knowledge article

1. In an Incident, find the **KSC Solution** field.
2. Click on the 🔍 to search for a knowledge article.
3. Click on the knowledge article that includes information appropriate to the problem.
4. Click **Save**.
   The knowledge article is saved as part of the Incident and is sent by email to the reporter.

HOW TO: Resolve an incident

1. In the Status field, click **Resolved**.
2. On the **Closure Information** tab:
   - Select a **Close Code**.
   - Select a **Classification Code.**
   - Enter information about the ticket resolution in **Close notes**. *This text is sent to the user.*
3. Click **Resolve Incident**.
   The ticket remains in your open queue in a resolved state for 30 days. If it is not reopened during that time, it will automatically close and be removed from your queue.

HOW TO: Attach & Send Documents

1. Click the and attach a file.
2. Click the and click **Reload Form**.
3. Above Additional Comments, click **Show Attachment selector**.
4. Click on the checkbox(ex) next to the attachment(s) you want to send to the user.
5. Write a note to the user in the **Additional Comments** field.
6. Click **Post**.
   The email sent to the client with the attachment is secure.

You can send attachments to the Work Notes list by putting a not in the **Work notes** field instead of the Addtional

HOW TO: Fix the look of a form or a list

If you access an Incident or a list (Assigned to me, Open incidents) and the form or list looks unusual (e.g., columns out of order, fields missing), someone has probably changed the View of the form.

To fix it:

1. Click (in the upper left corner).
2. Click **View** and select **Default View.**

HOW TO: Communicate with a client

1. From within the Incident, click the **Notes** tab.
2. If not selected, Select the **Additional Comments (Customer visible)** checkbox to toggle on.
3. In the **Additional comments** field, type your note to the customer.
4. Click **Post**.
   The note will be sent by email to the requester.

HOW TO: Keep track of your work and communicate internally

1. From within the Incident, click the **Notes** tab.
2. If not selected, Select the **Work Notes** checkbox to toggle on.
3. Type your update in the Work Notes field
4. Click **Post**.

HOW TO: Customize a List

1. When viewing any list in ServiceNow, to filter the data shown in the list, click .
2. Add search criteria.
3. Click **Run**.
   The list that displays includes the data that matches your selections.
4. To customize the columns included in the list and the order in which they appear, click .
5. To add columns, click the column name under Available and click the right arrow OR to remove columns, click the column name under Selected and click the left arrow
6. To change the order of the columns, select the name of the column and then click the up or down arrow to move the column where you want it.
7. Click **Save**.
   The list now appears with the columns you've selected in the order you specified.
8. To save the list for future review, click .
9. Click **Create Favorite**.
10. Enter a name for the list, select a color and an icon.
11. Click **Done**.

WHAT IS: The Watch List

People you add to this list will receive an email when you add text to the **Additional comments** field.

WHAT IS: The Work Notes List

People you add to this list will receive an email when you add text to the **Work notes** field.