DIVISION OF INFORMATION TECHNOLOGY SERVICES

ServiceNow: IT Staff User Guide

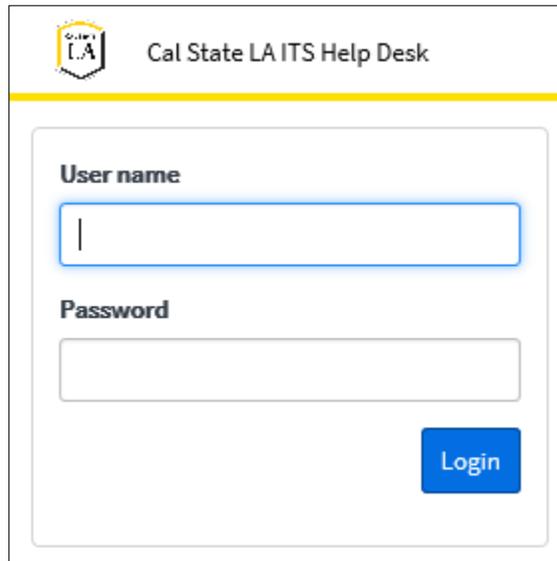Spring 2018, Version 2

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Introduction

ServiceNow is an online ticketing system that allows Cal State LA users to report IT issues and request IT services. The system keeps a log of all activities and automatically emails status updates, allowing users to track the status of an incident ticket or a service request that has been submitted. This handout provides an overview of the ServiceNow user interface and covers how to create and work on incident tickets, request and work on Service Catalog items, approve or reject requests, delegate approvals, search the knowledge bases, and get help.

Logging In

You can log in to ServiceNow from any device with an internet connection using your MyCalStateLA ID account.

To log in to ServiceNow:
1. Open a web browser and go to http://calstatela.service-now.com.
2. On the **ServiceNow** login page, enter your **MyCalStateLA ID** username and password in the corresponding fields, and then click the **Login** button (see Figure 1).

Figure 1 – ServiceNow Login Page

Overview of the User Interface

The ServiceNow user interface is composed of three main sections (see Figure 2).
1. The **Banner** frame is located at the top of the user interface and provides access to account settings, system settings, search, and help.
2. The **Navigation** bar is located on the left side of the user interface and provides access to all available applications and modules, your favorites, and recently viewed items.
3. The **Content** frame is located on the right side of the user interface and displays homepages, lists, forms, or reports.
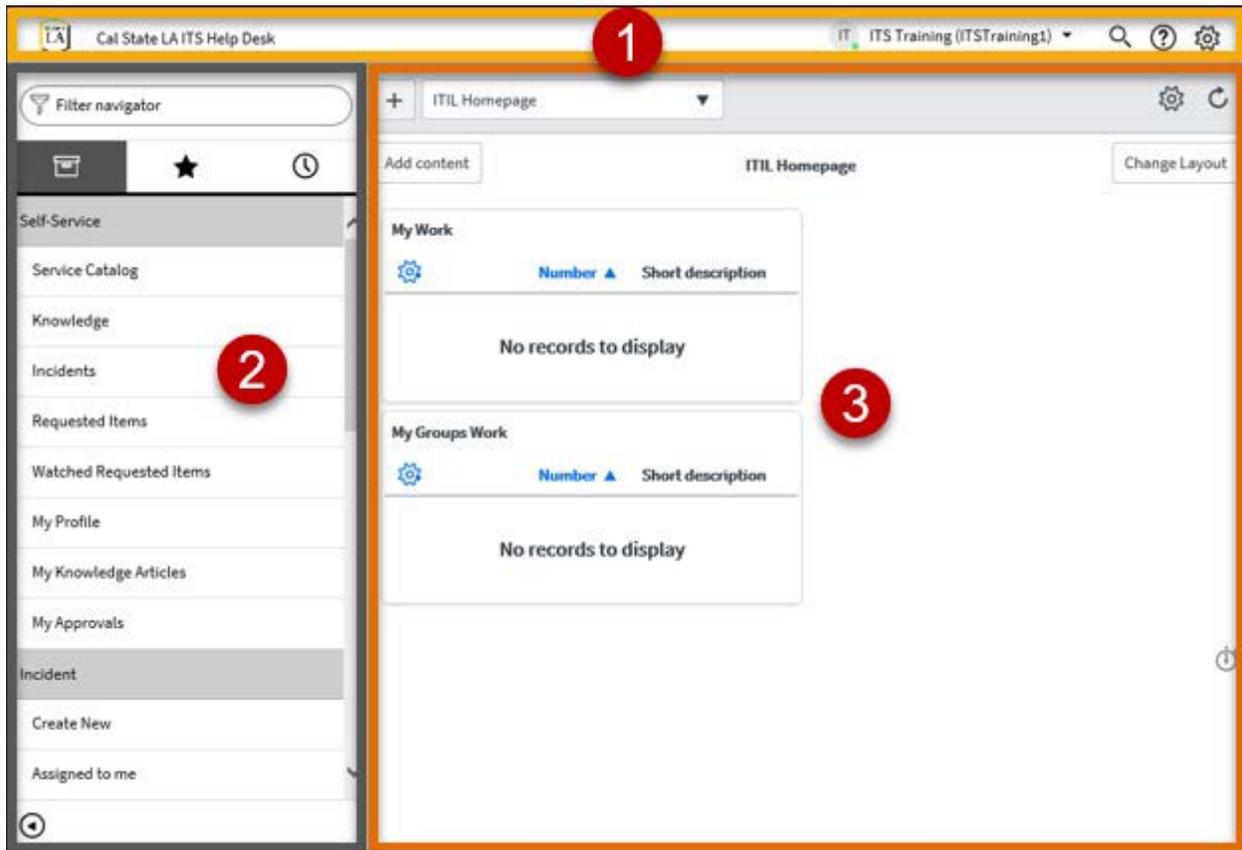
Figure 2 – ServiceNow User Interface

Banner Frame

The **Banner** frame runs across the top of every page and provides access to account settings, system settings, search, and help (see Figure 3).

1. Clicking the **Cal State LA** logo displays the last visited homepage in the Content frame.
2. The **User** menu displays the name of the logged in user. Clicking the menu provides access to the following options:
   - **Profile** displays your user profile page in the Content frame.
   - **Logout** logs you out of the system and returns to the login page.
3. Clicking the **Search** icon [Q] displays a Search box which can be used to search for text in the entire system.
4. Clicking the **Help** icon [?] opens the Help sidebar on the right side of the user interface which includes a link to the official ServiceNow product documentation.
5. Clicking the **Settings** icon [⚙] opens the System Settings pop-up window which allows you to customize the user interface and set your preferences.

Figure 3 – Banner Frame

Navigation Bar

The **Navigation** bar (also called the **Application Navigator**) provides access to all available applications and modules, your favorites, and recently viewed items (see Figure 4, Figure 5, and Figure 6). You can use the **Filter navigator** box at the top of the Navigation bar to quickly find an application or a module. As you enter text, the bar shows only matching applications and modules. You can collapse or expand the Navigation bar by clicking the **Minimize/Maximize Navigator** icon ⊙ at the bottom of the bar. In the collapsed view, only favorites are displayed and they appear as icons.

The Navigation bar consists of three tabs.

1. The **Applications** tab, represented by a **Storage Box** icon ▭, displays all available applications and modules (see Figure 4). Each application appears as a section on the tab. All modules that an application contains are listed below the application label. You can collapse or expand an application by clicking its label. Clicking a module opens it in the Content frame.

2. The **Favorites** tab, represented by a **Star** icon ★, displays items you have added as favorites (see Figure 5). Any application, module, list, or record can be marked as a favorite. By default, the Favorites tab includes a link to the homepage.

   - To add a favorite for an application or a module, click the **Applications** tab, point to the application or module, and then click the **Star** icon ☆ that appears on the right.

   - To reorder favorites in the list, click the **Favorites** tab, click the **Edit Favorites** icon ✎ at the bottom of the **Navigation** bar, drag a favorite to a new location in the list, and then click the **Edit Favorites** icon to exit edit mode.

   - To delete a favorite, click the **Favorites** tab, point to the favorite, and then click the **Remove Favorite** icon ⊖ that appears on the right.

3. The **History** tab, represented by a **Clock** icon ⊙, displays items you have recently accessed (see Figure 6). Items appear in chronological order from most to least recently accessed.
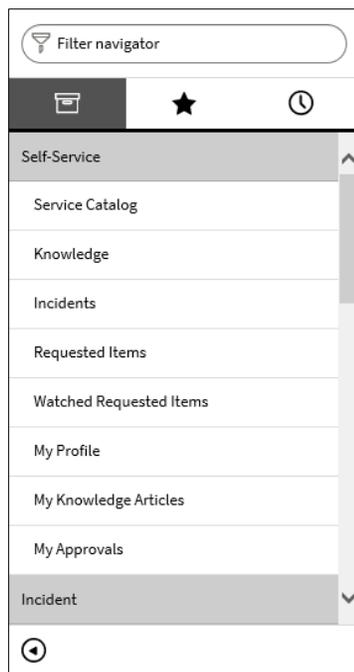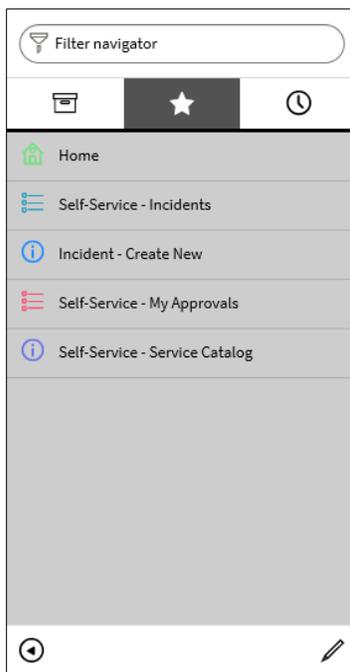

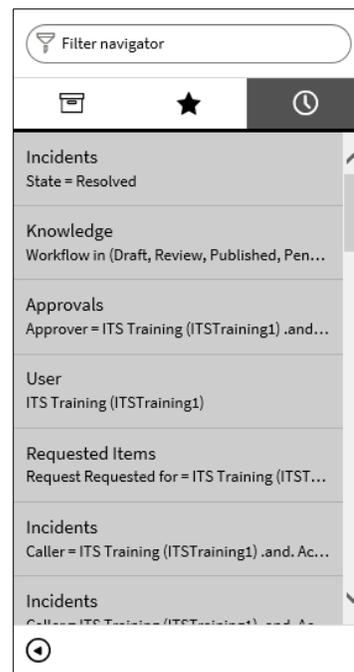| Figure 4 – Applications Tab of the Navigation Bar | Figure 5 – Favorites Tab of the Navigation Bar | Figure 6 – History Tab of the Navigation Bar |

Content Frame

The **Content** frame is the main area of the user interface and displays content such as homepages, lists, forms, or reports (see Figure 7).

Homepages

Homepages give an overview of the information you access often and provide quick access to commonly used features. Homepages include the following components (see Figure 7).

1. The **title bar** of the homepage appears at the top of the Content frame.
   - The **Switch to page** drop-down list on the left side of the title bar is used to switch to another homepage.
   - The **Refresh** icon [icon] on the right side of the title bar is used to refresh the page. You can specify a refresh interval of **5 minutes**, **15 minutes**, **30 minutes**, or **1 hour** by clicking the **Settings** icon [icon] next to the **Refresh** icon and selecting the desired option. The default is **Off** (no refresh).
2. The **title** of the homepage is centered and appears below the title bar.
3. Any **widget** that has been added to the homepage appears below the homepage title. Widgets are sections of content that provide information and links. Pointing to a widget's title bar displays editing controls on the right side of the bar (see Figure 8).
   - To move a widget, point to the widget's title bar until the mouse pointer changes to a four-headed arrow [icon], and then drag the widget to the desired location on the homepage.
   - To customize a list in a widget (e.g., add or remove columns), click the **Settings** icon [icon] on the left side of the column headers, select the desired options in the **Personalize List Columns** pop-up window, and then click the **OK** button.
   - To refresh a widget, point to the widget's title bar, and then click the **Refresh** icon [icon].
   - To edit a widget's appearance, point to the widget's title bar, click the **Settings** icon [icon], select the desired options in the **Edit Widget** pop-up window, and then click the **Done** button.
   - To remove a widget, point to the widget's title bar, and then click the **Close** icon [icon].
4. The **Add content** button on the left side of the homepage title is used to add different types of objects or widgets to the homepage.
5. The **Change Layout** button on the right side of the homepage title is used to change the layout of widgets on the homepage.

When you log in to ServiceNow, the **ITIL** homepage appears in the Content frame and includes two widgets (see Figure 7). The **My Work** widget displays a list of all tickets that are assigned to you. The **My Groups Work** widget displays a list of all tickets that are assigned to your group.

You can create a custom homepage to suit your needs.

- To create a custom homepage from scratch, click the **New page** icon [icon] on the left side of the title bar. The system automatically creates a homepage with the title **My Homepage**, indicating that it is your personal homepage. Add content as needed.
- To create a custom homepage based on an existing homepage, navigate to any homepage that you have access to, and then add new content or change the layout of the homepage as needed. The system automatically creates a homepage with the word **My** in front of the title (e.g., **My ITIL Homepage**), indicating that it is your personal homepage.

- To delete a custom homepage, navigate to the homepage that you want to delete, click the **Settings** icon ⚙ on the right side of the title bar, click the **Delete page** button, and then click the **OK** button.
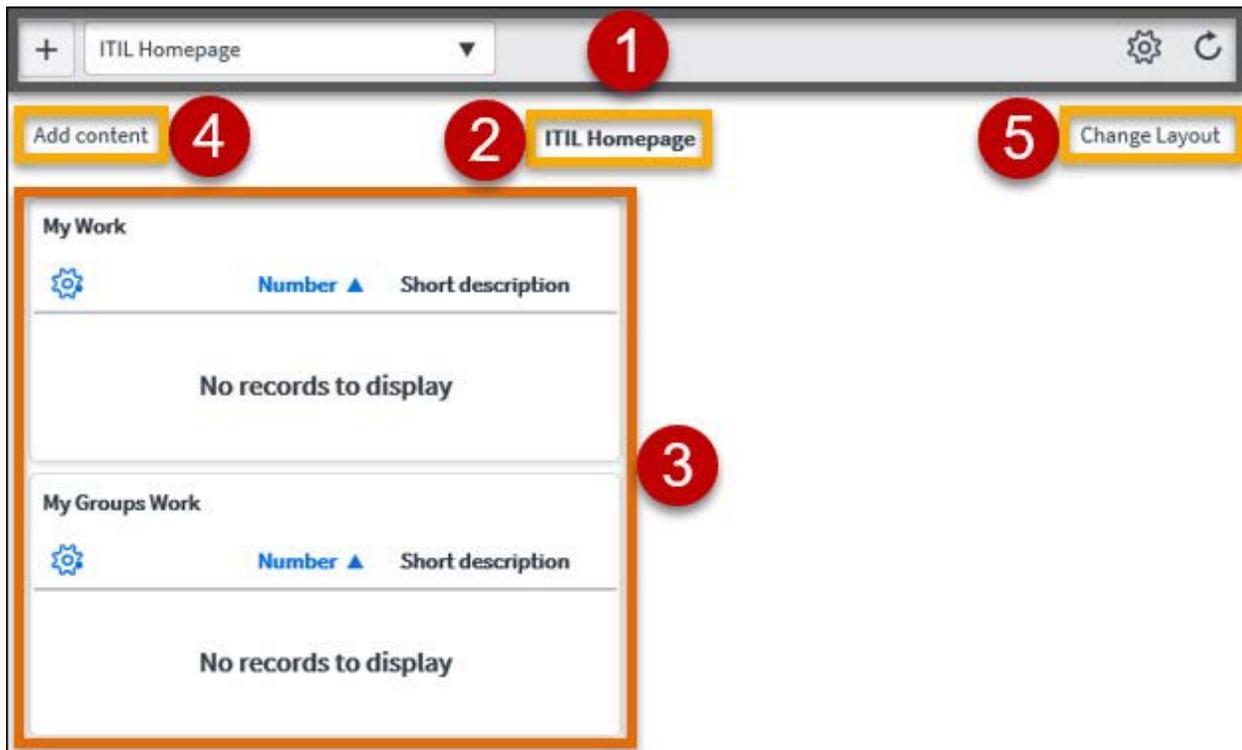

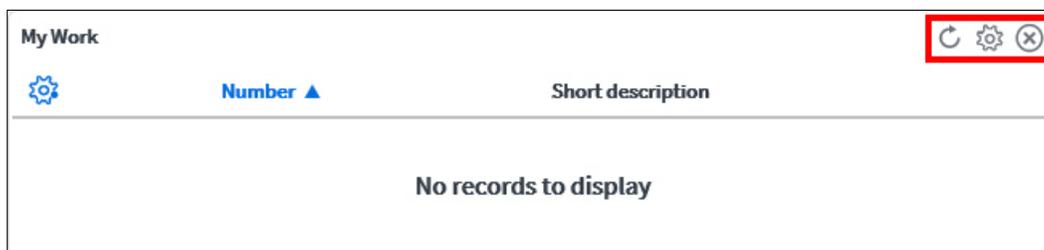Figure 7 – ITIL Homepage in the Content Frame

Figure 8 – Widget Editing Controls

Lists

Lists display a set of records from a data table. They are the most common way to view and manage data. You can search, sort, and filter data in lists to display the information you need. Lists include the following components (see Figure 9).

1. The **title bar** of the list appears at the top of the Content frame. It displays the name of the list and provides access to several controls.
   - The **Menu** icon ≡ provides access to options related to viewing and filtering the list.
   - The **New** button New opens a form which can be used to create a new record.
   - The **Go to** or **Search** box can be used to find information in the current list.
   - The **page controls** can be used to navigate to different pages in the list.
2. **Filters** and **breadcrumbs** can be used to display only the records that you need.

- A **filter** restricts what records appear in a list by providing a set of conditions each record must meet to be included in the list. To apply a filter, click the **Filter** icon ⎘ to open the condition builder, select the desired options, and then click the **Run** button.
- **Breadcrumbs** offer a quick form of filter navigation. The left condition is the most general, and the right condition is the most specific. Clicking a breadcrumb removes all the conditions to its right. Clicking the condition separator (>) before a condition removes only that condition.

3. **Column headers** appear at the top of each column and provide access to several list controls.

- To access the list column context menu, click the **Menu** icon ☰ to the left of the desired column header.
- To sort a list in ascending order, click a column header. Click it again to sort in reverse order. An arrow by the column header indicates the column currently being sorted as well as the sort direction. An upward pointing arrow indicates that the column is sorted in ascending order (A to Z). A downward pointing arrow indicates that the column is sorted in descending order (Z to A).
- To customize a list, click the **Settings** icon ⚙, select the desired options in the **Personalize List Columns** pop-up window, and then click the **OK** button.
- To search by one or more columns in a list, click the **Search** icon 🔍 to add a **Search** box below each column header, enter a search term in the **Search** box of the desired column, and then press the **Enter** key.

4. **Records** include columns of field values. Values wrap to multiple lines within the column. If underlined, the value is associated with a record. To access the related record, click the underlined value.
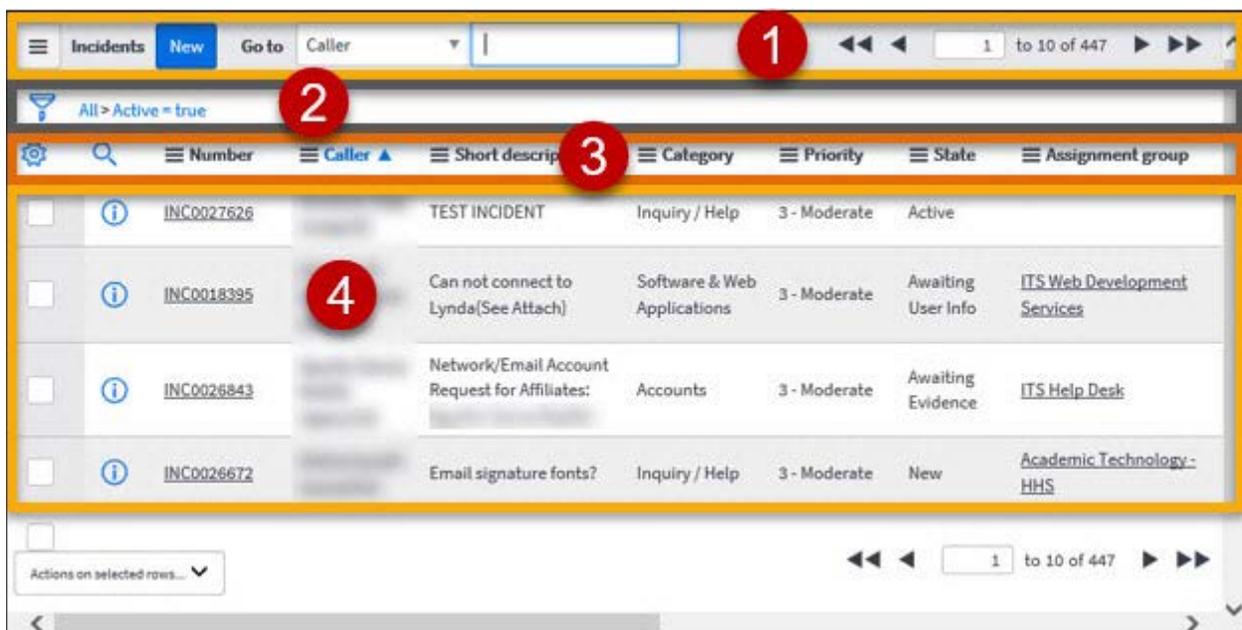

Figure 9 – Incidents List in the Content Frame

Incidents

An incident is any event which causes an interruption or a reduction of the quality of an IT service. ServiceNow allows IT staff members to log an incident, classify it according to impact and urgency, and manage it through the entire incident life cycle until the issue has been resolved.

The incident life cycle includes several states (see Table 1). As part of the process, a service level agreement (SLA) is used to ensure that an incident is resolved within a certain amount of time. The SLA timer starts counting when the incident ticket is created.

Table 1 – Incident States

State	Description	SLA Timer
New	The incident ticket is created, but it is not being worked on.	Counting
Active	The incident ticket is assigned and is being worked on.	Counting
Awaiting User Info	The user is asked to provide additional information before the incident ticket can be resolved.	Paused
Awaiting Evidence	The user is asked to confirm that the implemented resolution has fixed the issue.	Paused
Resolved	The incident ticket is resolved and the user is notified.	Stopped
Closed	The incident ticket is marked Closed after it has been in the Resolved state for 10 days.	Stopped

Creating Incident Tickets

As an IT staff member, you can create an incident ticket for yourself or on behalf of someone else.

To create an incident ticket:
1. On the **Applications** tab of the **Navigation** bar, under **Incident**, click **Create New** (see Figure 10).
2. The **Incident** form opens in the **Content** frame (see Figure 11). Fill in all relevant fields (see Table 2 for a description of each field).

   NOTE: Fields marked with a red asterisk are required. Read-only fields are gray.

3. To add an attachment (such as a screenshot of the error), click the **Attachment** icon 📎 on the form's title bar to open the **Attachments** pop-up window, select the file that you want to attach, and then click the **Close** icon ✖ . The attachment appears at the top of the form.
4. When finished, click the **Submit** button. An email notification is sent to the user and to the members of the assigned group.
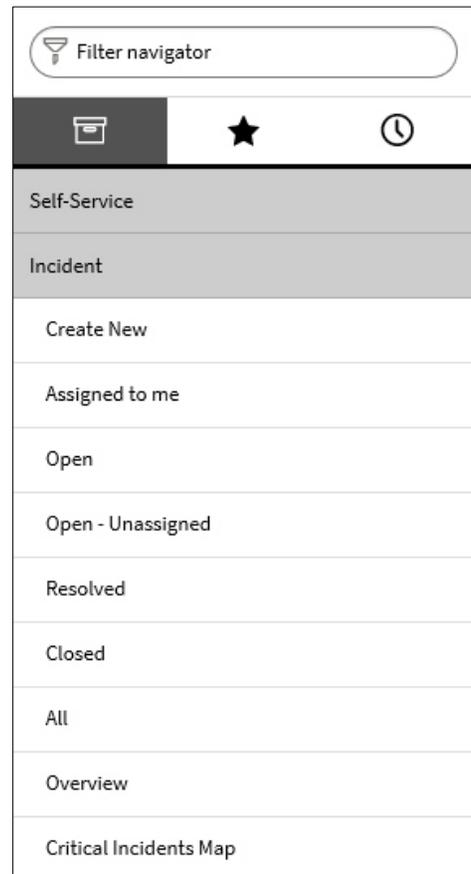

Figure 10 – Incident Application on the Applications Tab of the Navigation Bar

Figure 11 – Incident Form

Table 2 – Incident Form Fields

Field	Description
Number	This is a unique, auto-generated number for the incident ticket. Incident numbers are preceded with the **INC** prefix (e.g., INC0000001).
Caller	Enter the name of the user who is reporting or is affected by the incident. You can start typing the user's name, username, or CIN to display a list of matching users, and then select the appropriate user from the list. You can also click the **Lookup** icon 🔍 on the right side of the field and select a user from the list. Once you select a user, one or more fields autofill with the user's information.
Location	If the user is an active employee, this field is autofilled with the user's office location.
CIN/Employee ID	Enter the user's CIN or Employee ID.
MyCalStateLA ID	Enter the user's MyCalStateLA ID username.
Phone Number	Enter the user's phone number.

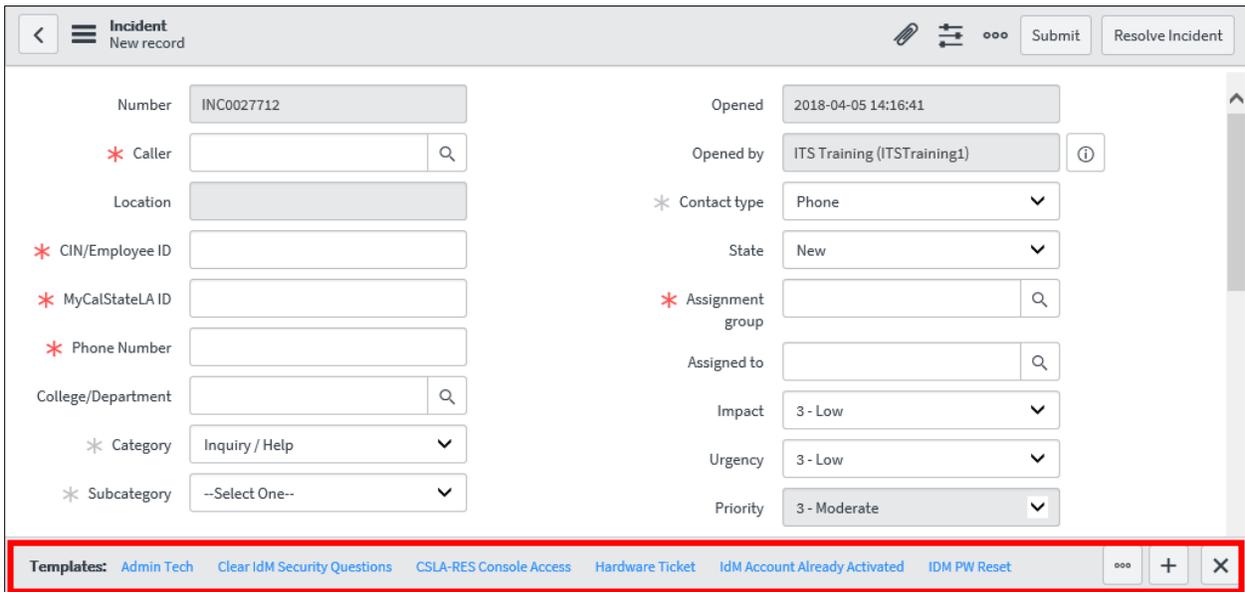| Field	Description
College/Department	Enter the user's college or department. You can also click the **Lookup** icon on the right side of the field and select a college or department from the list.
Category	Select a category based on the type of incident being reported.
Subcategory	If applicable, select a subcategory for the incident. The options available in the subcategory list are dependent on the selected category.
Opened	This field is autofilled with the date and time the incident ticket is created.
Opened by	This field is autofilled with the logged in user's name.
Contact type	Select the type of communication used to report the incident.
State	Select the current state of the incident.
Assignment group	Enter the group to assign the incident to. You can also click the **Lookup** icon on the right side of the field and select a group from the list.
Assigned to	If known, enter the group member to assign the incident to. You can also click the **Lookup** icon on the right side of the field and select a group member from the list.
Impact	Select the level of impact (**1 - High**, **2 - Medium**, or **3 - Low**) based on the number of users that are affected. The more users affected, the higher the impact.
Urgency	Select the urgency (**1 - High**, **2 - Medium**, or **3 - Low**) based on how much the incident impairs the user's ability to work.
Priority	This field is automatically set based on the selected impact and urgency.
Short description	Enter a brief description of the incident. The short description should answer **who** (type of user), **what** (issue and device), and **where** (location). You can also click the **Suggestion** icon on the right side of the field and select a description from the list of common issues.
Description	Enter a detailed description of the incident. The description should answer **who** (type of user and their contact information), **what** (issue and device information in detail), **where** (location), **when** (date, time, and frequency), and any initial troubleshooting that has been done.
Watch list	Click the **Edit Watch list** icon to add users who will receive email notifications regarding ticket updates and status changes. Click the **Add me** icon to add yourself to the list.
Work notes list	Click the **Edit Work notes list** icon to add users who will receive email notifications when work notes are added to the incident. Click the **Add me** icon to add yourself to the list.
Additional comments (Customer visible)	Enter any information that you want the user to be aware of. Anything entered in this field will be added to the **Activity** log and sent to the user via email.
Work notes	If applicable, enter information about how to resolve the incident or steps already taken to resolve it. Work notes are not seen by end-users.

Using Templates

ServiceNow includes several templates to simplify the process of creating an incident ticket. Templates automatically fill in the appropriate fields for a specific type of incident, reducing the amount of time you spend completing a form.

NOTE: Applying a template to an existing ticket will overwrite data in certain fields. Thus, it is suggested that you use templates to create a new incident or as a reference for existing tickets.

To use a template:

1. On the **Applications** tab of the **Navigation** bar, under **Incident**, click **Create New** (see Figure 10). The **Incident** form opens in the **Content** frame (see Figure 11).
2. Click the **More options** icon [ᵒᵒᵒ] on the form's title bar, and then click **Toggle Template Bar**. The **Template** bar appears at the bottom of the **Content** frame (see Figure 12).
3. On the **Template** bar, click the desired template. The selected template autofills one or more fields.
4. Fill in the remaining fields as applicable.
5. When finished, click the **Submit** button.

Figure 12 – Template Bar

Working on Incident Tickets

When an incident ticket is assigned to you or your group, you will receive an email notification that includes the incident number and some details. You should open the incident ticket and work on its resolution as soon as possible.

To work on an incident ticket:

1. Click the incident number in the email notification to open the ticket in **ServiceNow**. The **Incident** form opens in the **Content** frame.

   NOTE: You can also open incident tickets within **ServiceNow** by navigating to the **ITIL Homepage**, and then clicking the incident number in the **My Work** or **My Groups Work** widget.

2. If necessary, assign the ticket to yourself by entering your name in the **Assigned to** field.

3. Update all relevant fields and add notes as appropriate. Use the **Additional comments (Customer visible)** field to enter any information that needs to be communicated to the user (such as follow-ups with the user or work performed on the ticket).

4. To add an attachment, click the **Attachment** icon ![attachment] on the form's title bar to open the **Attachments** pop-up window, select the file that you want to attach, and then click the **Close** icon ![close] . The attachment appears at the top of the form.

5. When finished, click the **Update** button on the form's title bar (see Figure 13).

    NOTE: A history of each change is saved in the **Activity** log of the **Incident** form (see Figure 14).

Figure 13 – Update Button on the Incident Form's Title Bar
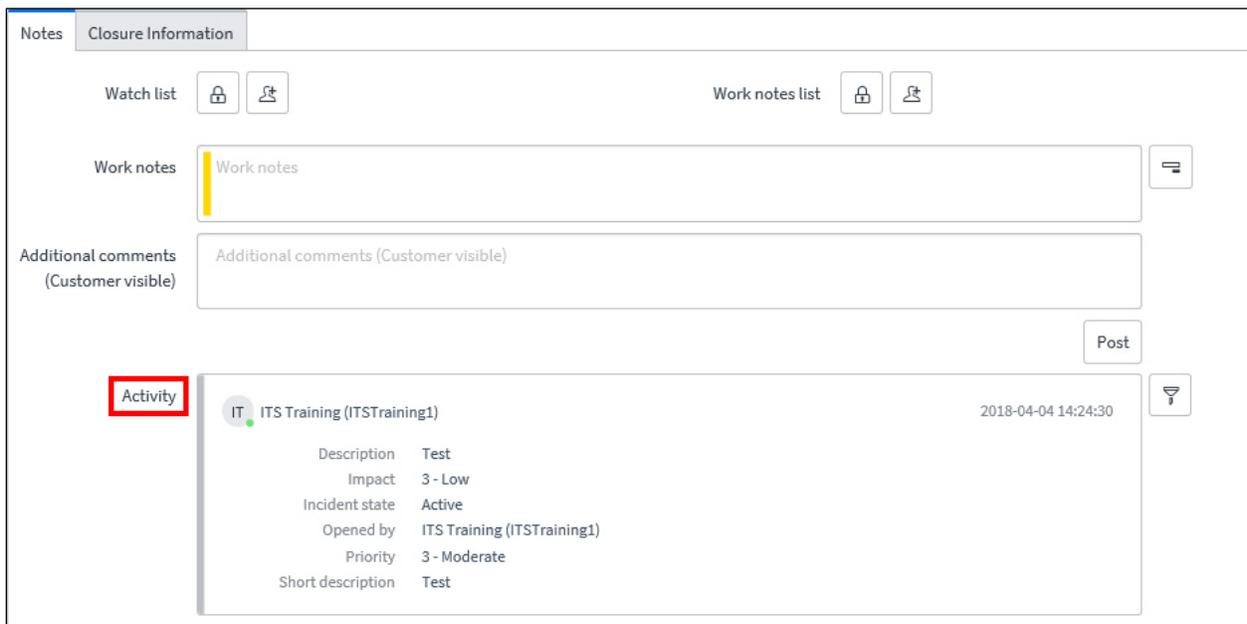
Figure 14 – Activity Log on the Notes Tab of the Incident Form

Attaching Knowledge Base Articles to Incident Tickets

ServiceNow includes knowledge base articles that may answer frequently asked questions or contain the resolution to common issues. Sending the appropriate knowledge base article to a user may provide useful information or help them resolve issues on their own.

To attach a knowledge base article to an incident ticket:

1. Open the incident ticket to which you want to attach a knowledge base article. The **Incident** form opens in the **Content** frame. The **Related Search Results** section below the **Description** field lists knowledge base articles based on text entered in the **Short description** field (see Figure 15).

    NOTE: You can preview an article by clicking its title or the **Preview** button.

2. Click the **Attach** button next to the article that you want to attach. Its content is copied to the **Additional comments (Customer visible)** field.

3. Click the **Update** button on the form's title bar. An email notification containing the knowledge base article is sent to the user.

Figure 15 – Related Search Results Section of the Incident Form

Resolving and Closing Incident Tickets

After resolving an incident, you should update the incident ticket and communicate with the user. When the ticket is placed in the **Resolved** state, the user is notified via email that the issue is resolved and to review the resolution. If needed, the user can reopen the ticket by clicking the link in the email notification. If the user is satisfied with the resolution and takes no action, the ticket is automatically closed after 10 days.

NOTE: Once an incident ticket is closed, it cannot be edited or reopened.

To resolve an incident ticket:
1. Open the incident ticket that you want to resolve. The **Incident** form opens in the **Content** frame.
2. On the **Notes** tab, in the **Additional comments (Customer visible)** field, enter comments for the user such as how the incident was resolved or what is the next step the user needs to take (see Figure 16).

Figure 16 – Notes Tab of the Incident Form

3. On the **Closure Information** tab, select the appropriate option from the **Close code** drop-down list, and then enter notes on how the incident was resolved in the **Close notes** field (see Figure 17).
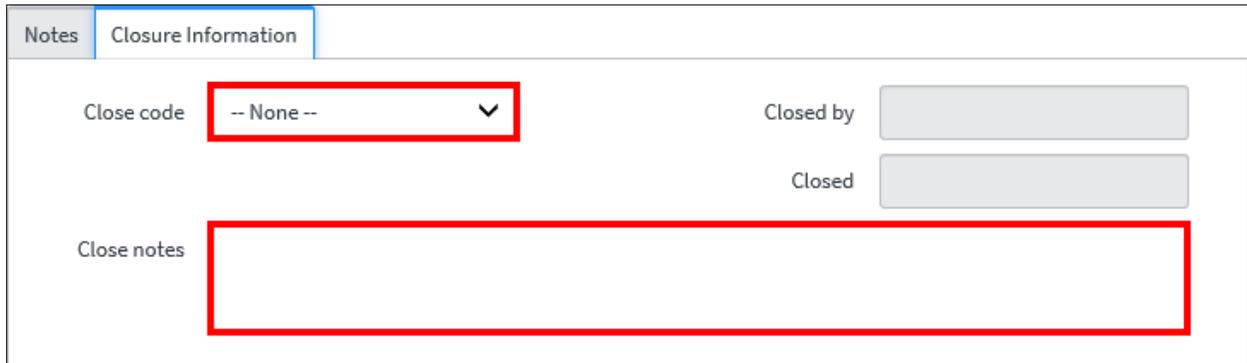

Figure 17 – Closure Information Tab of the Incident Form

4. When finished, click the **Resolve Incident** button on the form's title bar (see Figure 18). The ticket is updated and placed in the **Resolved** state, and an email notification is sent to the user indicating that the issue has been resolved.

Figure 18 – Resolve Incident Button on the Incident Form's Title Bar

Service Catalog

ServiceNow includes a **Service Catalog** that enables users to request IT products and services. Catalog items are grouped into categories and subcategories to help users quickly find the items they need. Each Service Catalog request generates an associated item and task (see Figure 19). The requested item contains the details of the request, while the task contains the actions that need to be completed to fulfill the request.

NOTE: Request numbers are preceded with the **REQ** prefix (e.g., REQ0000001). Requested item numbers are preceded with the **RITM** prefix (e.g., RITM0000001). Task numbers are preceded with the **TASK** prefix (e.g., TASK0000001).
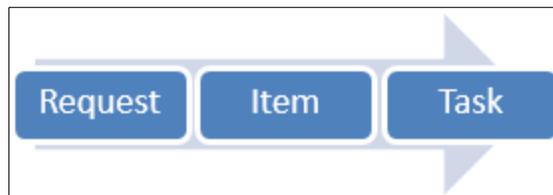

Figure 19 – Request Workflow

Requesting Service Catalog Items

The **Service Catalog** homepage lists the products and services that are available for request. As an IT staff member, you can submit a request for yourself or on behalf of someone else.

To request a Service Catalog item:

1. On the **Applications** tab of the **Navigation** bar, do one of the following:
    *   Under **Self-Service**, click **Service Catalog** (see Figure 20).
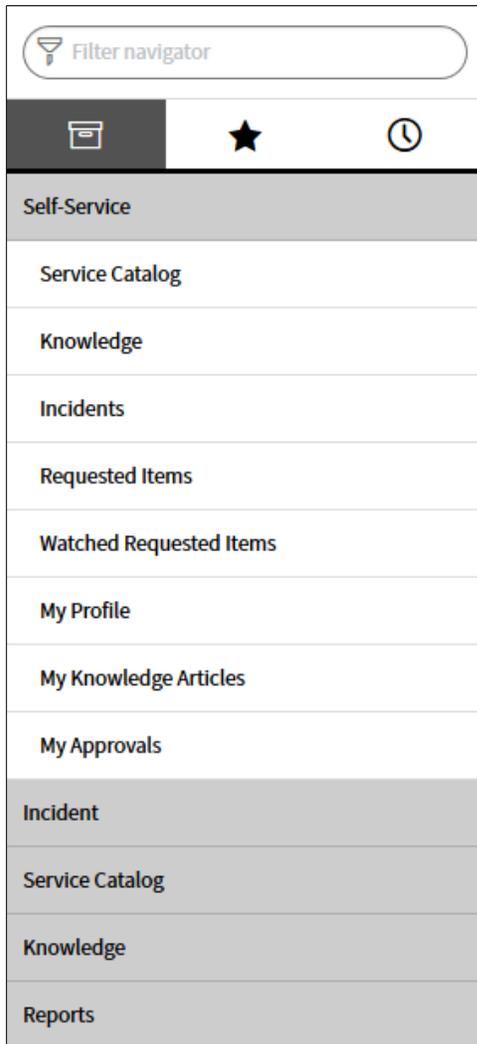   *   Under **Service Catalog**, click **Catalog** (see Figure 21).

Figure 20 – Self-Service Application on the Applications Tab of the Navigation Bar
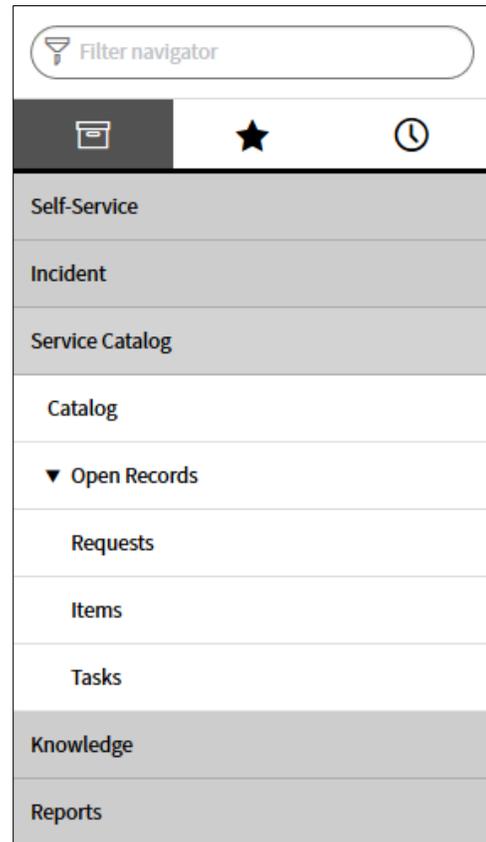

Figure 21 – Service Catalog Application on the Applications Tab of the Navigation Bar

2. The **Service Catalog** homepage opens in the **Content** frame (see Figure 22). Click the desired category (e.g., **Network Services**), and then click the item that you want to request (e.g., **Data Jack Activation**).

    NOTE: If the product or service that you want to request is not included in the available categories, click the **Can We Help You** category on the **Service Catalog** homepage, and then click **Request a Service**.
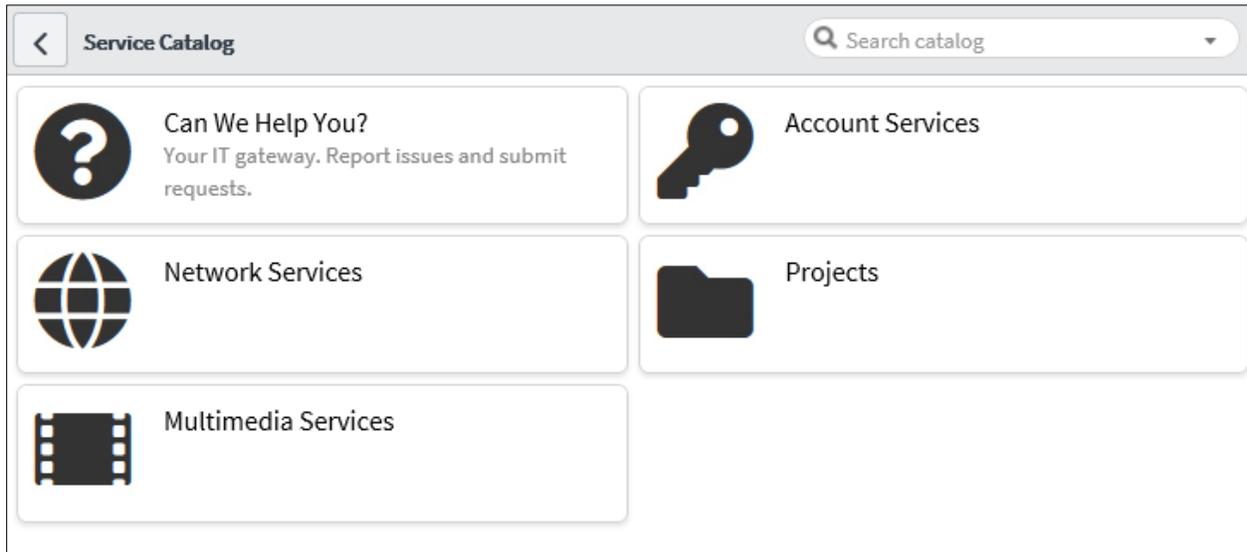
Figure 22 – Service Catalog Homepage

3. The **Service Catalog** request form for the selected item opens in the **Content** frame (see Figure 23). Fill in all relevant fields.

   NOTE: Fields marked with a red asterisk are required. Read-only fields are gray.

4. To add an attachment, click the **Attachment** icon on the form's title bar to open the **Attachments** pop-up window, select the file that you want to attach, and then click the **Close** icon . The attachment appears at the top of the form.

5. When finished, click the **Submit Request** button. A confirmation message displays in the **Content** frame and an email notification is sent to you to confirm that the request has been submitted.

Figure 23 – Service Catalog Request Form

Approving or Rejecting Service Catalog Requests

If a Service Catalog item requires approval before it can be fulfilled, the designated approver is automatically notified via email that they have an item to approve. The approver can approve or reject a requested item via email or the ServiceNow system.

To approve or reject a requested item via email:
1. In **Outlook**, open the email notification for the item that requires your approval.
2. In the **Comments** section, click the **Approve** or **Reject** link.

To approve or reject a requested item via ServiceNow:
1. On the **Applications** tab of the **Navigation** bar, under **Self-Service**, click **My Approvals** (see Figure 20).
2. The **Approvals** list opens in the **Content** frame. Locate the item that you want to approve, and then click the **Requested** link in the **State** column (see Figure 24).

Figure 24 – Approvals List

3. The **Approval** form opens in the **Content** frame. Review the request, and then click the **Approve** or **Reject** button on the form's title bar or at the bottom of the form (see Figure 25).
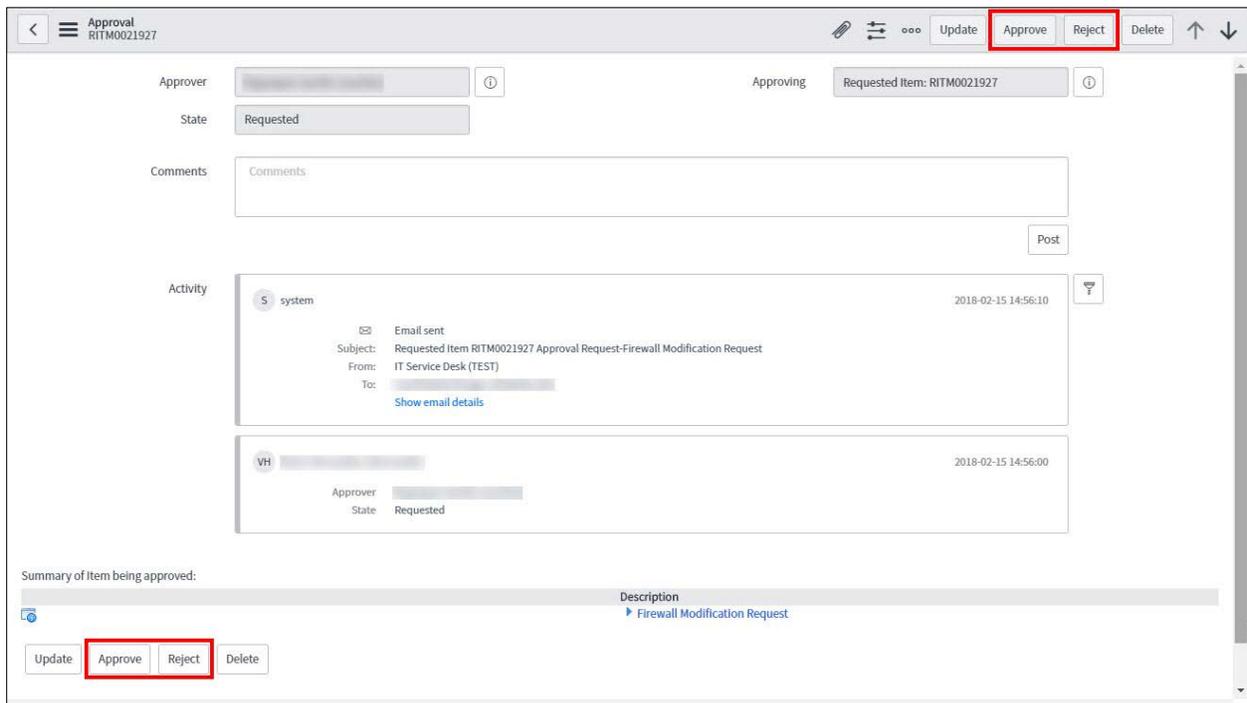

Figure 25 – Approval Form

Closing Service Catalog Tasks

When a task is assigned to you, you will receive an email notification that includes the task number and some details. Once you complete the work described in the task, you should close the task.

To close a service catalog task:
1. Click the task number in the email notification to open the task in **ServiceNow**. The **Catalog Task** form opens in the **Content** frame (see Figure 26).

    NOTE: You can also open tasks within **ServiceNow** by navigating to the **ITIL Homepage**, and then clicking the task number in the **My Work** or **My Groups Work** widget.

2. If necessary, assign the task to yourself by entering your name in the **Assigned to** field.
3. On the **Work Activity** tab, in the **Work notes** field, enter notes on how the task was completed.
4. On the **Original Request** tab, complete any required fields.
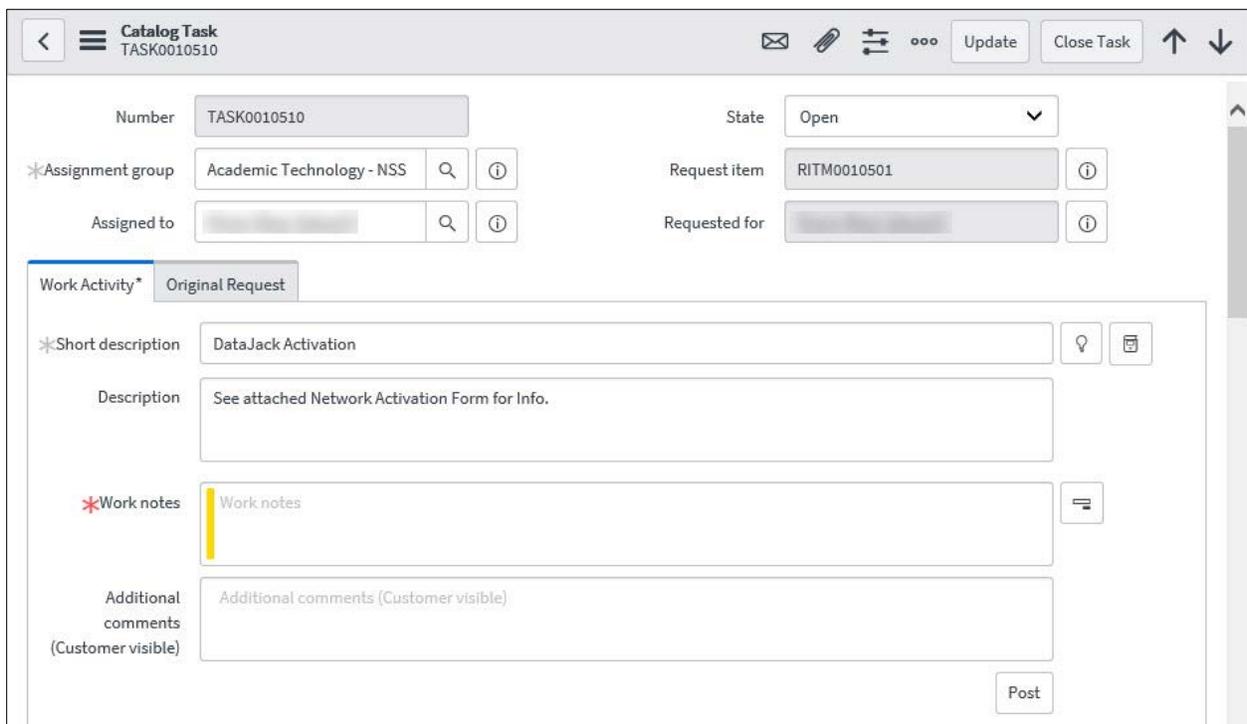5. Click the **Close Task** button on the form's title bar or at the bottom of the form.

Figure 26 – Catalog Task Form

Delegating Approvals and Tasks to Another User

If you will be out of the office for an extended period of time, you can delegate your responsibilities to another user to ensure that ServiceNow approval requests are processed and tasks are completed.

To delegate approvals and tasks to another user:
1. On the **Applications** tab of the **Navigation** bar, under **Self-Service**, click **My Profile** (see Figure 20).
2. Your profile page opens in the **Content** frame. On the **Delegates** tab, click the **New** button (see Figure 27).
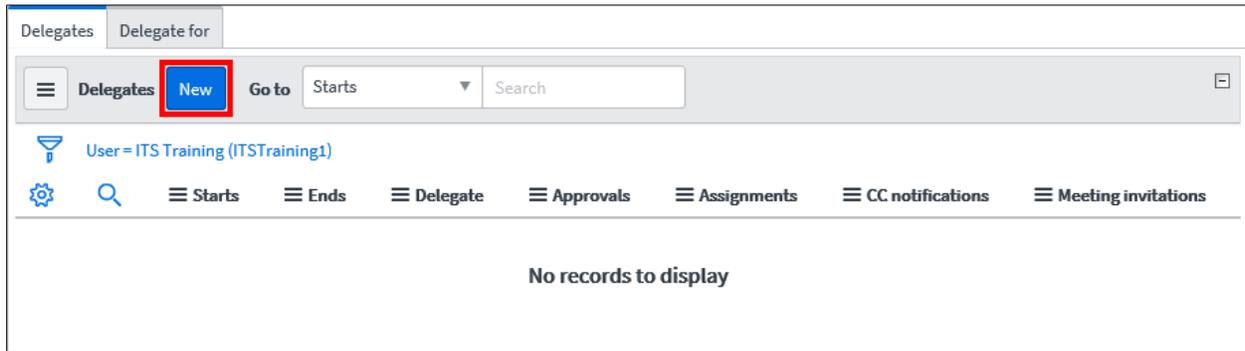
Figure 27 – Delegates Tab on the Profile Page

3. The **Delegate** form opens in the **Content** frame (see Figure 28). In the **Delegate** field, enter the name of the delegate. Or, click the **Lookup** icon [Q] on the right side of the field and select a user from the list.
4. In the **Starts** and **Ends** fields, enter the start and end dates and times.
5. On the right side of the form, select the check box for the type of responsibility that you want to delegate.
   - **Approvals** allows the delegate to approve items on your behalf.
   - **Assignments** allows the delegate to view and work on tasks assigned to you.
   - **CC notifications** copies the delegate on email notifications sent to you, except those marked Meeting Invitation.
   - **Meeting invitations** copies the delegate on email notifications sent of the type Meeting Invitation.
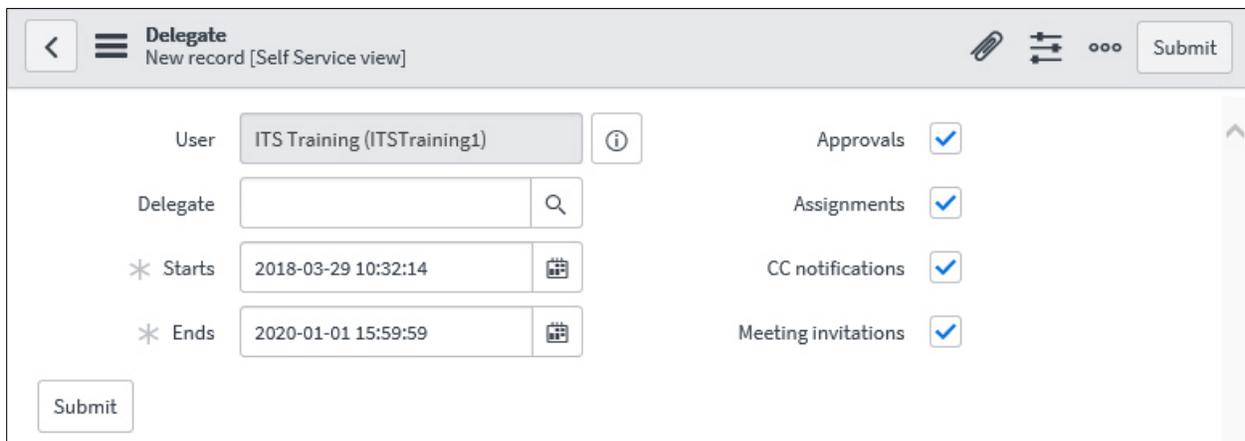6. Click the **Submit** button.

Figure 28 – Delegate Form

Self-Service

The **Self-Service** application is available to IT staff members as well as end-users (see Figure 29). It enables users to report an issue, request a service, track their requests, approve or reject requests, and access the knowledge base.
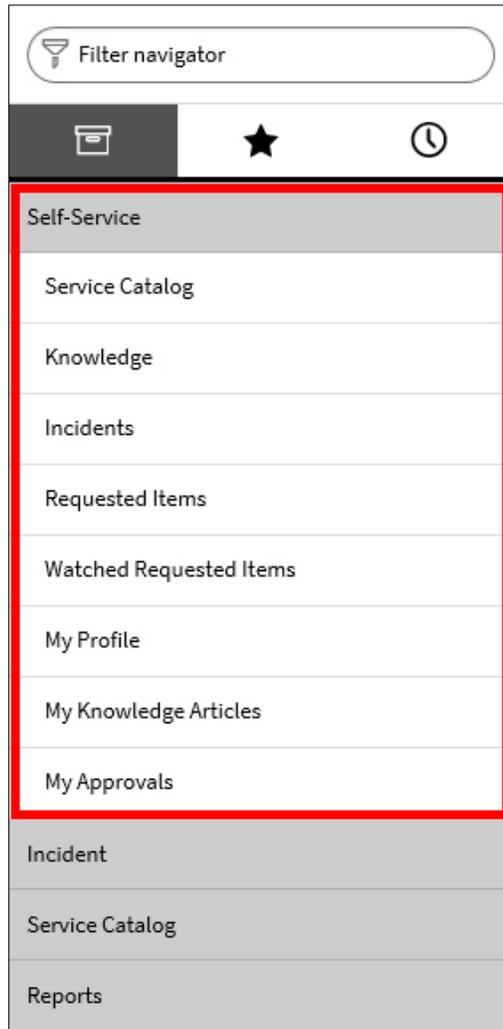
Figure 29 – Self-Service Application on the Applications Tab of the Navigation Bar

Searching the Knowledge Bases

ServiceNow includes several knowledge bases. Articles within each knowledge base are organized by category to help you quickly find the information you need. You can browse and search the knowledge bases to find information or solutions to problems.

To search the knowledge bases:
1. On the **Applications** tab of the **Navigation** bar, under **Self-Service**, click **Knowledge** (see Figure 29). The **Knowledge** homepage opens in the **Content** frame (see Figure 30).
2. Select the knowledge base that you want to search.

   NOTE: If you do not select a specific knowledge base, the search results will include articles from all knowledge bases that you can access.

3. Enter one or more keywords in the **Search** box at the top of the **Knowledge** homepage, and then press the **Enter** key. The search results display in the **Content** frame.
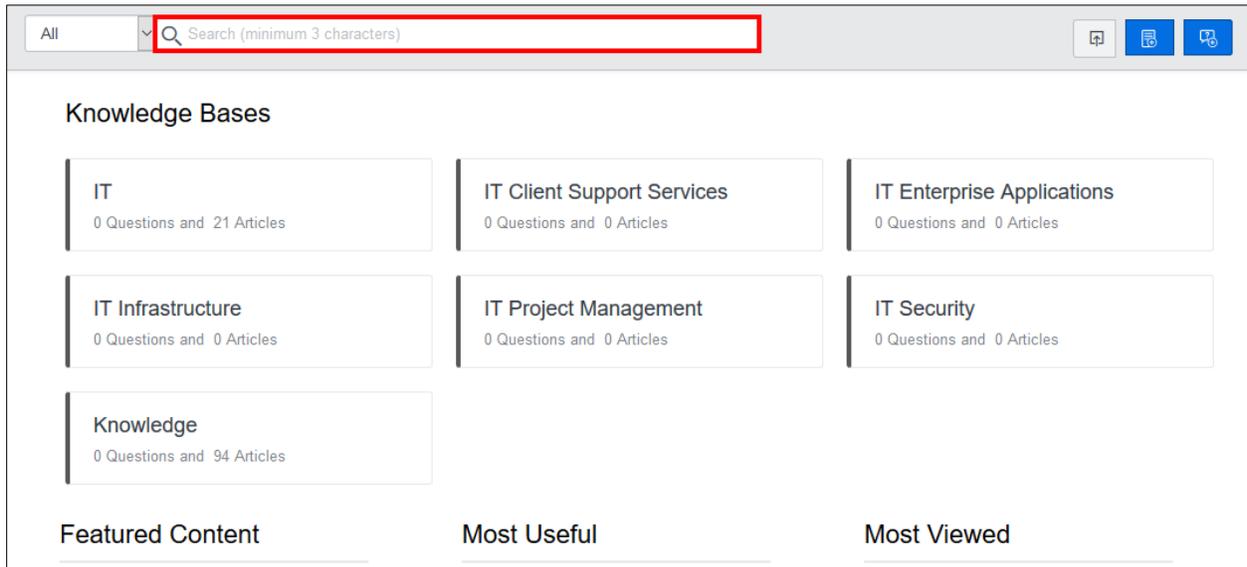4. Click an article to open it.

Figure 30 – Knowledge Homepage

Getting Help

ServiceNow includes a contextual help feature that can be used to get assistance on any topic or task.

To get help:

1. In the **Banner** frame, click the **Help** icon ⑦. The **Help** sidebar opens on the right side of the user interface (see Figure 31).
2. Click the **Search Documentation** link. The official **ServiceNow Product Documentation** website opens in a new tab.
3. Click any link to display the corresponding information or use the **Search** box in the upper-right corner of the page to search for a specific topic.
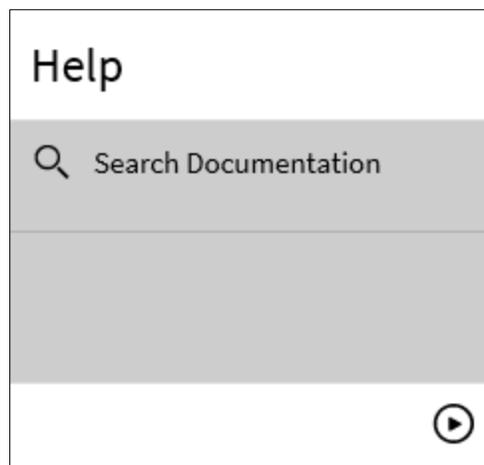

Figure 31 – Help Sidebar

Logging Out

Logging out prevents others from accessing your account. When you have finished using ServiceNow, you should log out of the system and close the web browser window.

NOTE: For security reasons, your session will time out after four hours of inactivity.

To log out of ServiceNow:

1. In the **Banner** frame, click the **User** menu, and then click **Logout** (see Figure 32).
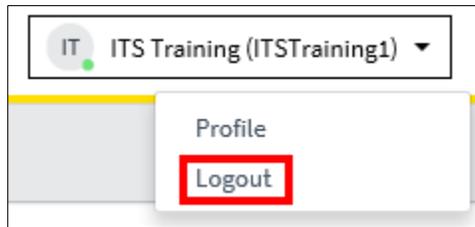2. Close the web browser window.

Figure 32 – User Menu