ServiceNow
Helsinki Upgrade
Training Session

Missie Martin
IT Service Management Office
Training Session Objectives

- New User Interface (UI)
- Knowledge Base Updates
  - Knowledge including Submission Form
  - Multiple Knowledge Bases
- Incident & Task Forms with Knowledge Integration
  - Custom Field Migration to Out-of-Box Fields
  - Incident Categorization
  - Service Level Agreements (SLAs)
- Service Portal for Self Service
  - Status on Service Outages (MIN & SIA)
  - Subscribing to Major Incident Notifications
  - Community sources QA
- Retired Fields and Migrating Data
New User Interface
New UI Bookmarks and Favorites

- Power Edge removed
- Double-click **Box Icon** to collapse or expand all applications
- **Edit Favorites** allows user to change colors, icons and re-sort list
- Close **Navigation Bar** and the **Favorite** icons stay on the edge
- **Clock** will show a listing of users activity history
New UI System Settings (gear icon)

Users can **personalize** their settings
New Feature: Quick Email Templates

• New feature under Self Service
• Pre-scripted messages that can be used when sending emails
• Note the template will overlay any message typed before it was selected
New Feature: Quick Email Templates

- If you have created a template, the Quick Message box will appear when an email is composed.
Knowledge Submission

• Used for version control and the review process
• Changes are tracked through the submission process when an article is published

Submit saves the form and generates an article

Send for Review changes state to Submitted and moves to champions queue for review
Multiple Knowledge Bases

Knowledge Bases

- Information Technology (IT)
  - 495 Articles
- Self-Service
  - 741 Articles
- Service Desk
  - 35 Articles
- Social QA
  - 0 Articles

Featured Content

There is currently no content for this section

Most Useful

- Creating/Deleting a Sponsored Account
- Testing Your Emory Account with Duo Two-Factor Authentication
- Change your Emory Unplugged password on iOS devices (iPhone/iPad)
- How To Reset or Change Your University Password
- Exchange: Configure your iOS device for Emory
- Exchange (iPhone/iPad/iPod Touch)

Most Viewed

- test
- Office365 Service Desk Reference Guide
- Blackboard Bb - Rules for Naming Files
- Blackboard Bb - Create and Add a Test Student to my Blackboard Course
- SOM Samanage Installation for Mac
Incident & Task Forms with Knowledge Integration
**Incident Form**

![Incident Form Screen](image)

- **Number**: INC02589288
- **Reported by**: MMART14
- **Name**: Missie Martin
- **Phone**: 4046862827
- **Email**: missie.martin@emory.edu
- **Reported for**: MMART14
- **Location**: 1784 N Decatur Rd
- **Reported source**: -- None --
- **Opened**: 2017-01-22 09:17 PM
- **State**: New
- **Pending Code**: -- None --
- **EHC ticket number**: 
- **Transfer to EHC**: -- None --
- **Knowledge article**: 
- **Suppress notification**: 
- **Caused by change**: 
- **RFC**: 
- **SLA due**: 2017-01-17 05:00 PM
- **Special instructions**: 
- **Sticky notes**: supported by LITS: client services

**Short description**: Laptop Monitor Busted
Related Search Results

- New feature on Incident and Incident Task forms
- **Attach** auto-populates the KB field on the incident form
- **Preview** opens article in new window
- **Order** opens Catalog Request form in new window

<table>
<thead>
<tr>
<th>Sponsored Account Access to Emory Box</th>
<th>Request Box Sponsored Account</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Related Search Results</strong></td>
<td></td>
</tr>
<tr>
<td>Sponsored Account Access to Emory Box</td>
<td>Request Box Sponsored Account</td>
</tr>
<tr>
<td>Box Service Desk Reference Guide</td>
<td>- Group Emory Box Account Request Procedures KB04114- Sponsored Emory Box Account Procedures...provided Box ...</td>
</tr>
<tr>
<td>Box Sponsored Account Access</td>
<td>Complete this form to allow a sponsored account user access to Emory Box</td>
</tr>
<tr>
<td>Listing and Renewing your Sponsored Account</td>
<td>that would ordinarily happen as the result of the account expiring, open a generic service request ticket... selected accounts whose expiration d...</td>
</tr>
<tr>
<td>Vidyo FAQ</td>
<td>. If a non-Emory person needs to host meetings, we recommend obtaining an Emory sponsored account. These can be requested through the Service Now ...</td>
</tr>
</tbody>
</table>
Public and Work Notes

- **Work Notes** visible only to ITIL users
- **Public notes** are emailed and visible to customer
- Both are tracked in the Activity Log
### Activity Log

<table>
<thead>
<tr>
<th>Activity</th>
<th>System</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Email sent</td>
</tr>
<tr>
<td></td>
<td>Subject: ASSIGNED: Incident INC02617097 has been assigned to you</td>
</tr>
<tr>
<td></td>
<td>From: ITSM System -- TEST</td>
</tr>
<tr>
<td></td>
<td>To: <a href="mailto:al.shelton@emory.edu">al.shelton@emory.edu</a></td>
</tr>
<tr>
<td></td>
<td>Show email details</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Assigned to</th>
<th>ASHELTO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reported by</td>
<td>ASHELTO</td>
</tr>
<tr>
<td>Configuration item</td>
<td>ServiceNow</td>
</tr>
<tr>
<td>Detailed description</td>
<td>This is a test This is a test This is a test This is a test This is a test</td>
</tr>
<tr>
<td>Impact</td>
<td>3 - Moderate/Limited</td>
</tr>
<tr>
<td>z_Incident state</td>
<td>Assigned</td>
</tr>
<tr>
<td>Priority</td>
<td>2 - High</td>
</tr>
<tr>
<td>Short description</td>
<td>Testing Categories</td>
</tr>
</tbody>
</table>

2017-01-22 07:02 AM

---

**Options**

- All
- Actual Resolved Date/Time
- Assigned to
- Assignment group
- Attachments
- Comments and Work notes
- Configuration item
- Detailed description
- EHC ticket number
- Impact
- Manual routing reason
- Priority
Incident Categorization: Custom vs OOB

• Categorization now utilizes the CMDB Technical and Business Services listing instead of the customized Category 1 listing

• The out-of-box "Service" field was chosen because it offered an alternative to the custom Category 1 field and it allowed us to retain three levels of categorization instead of having to use the out-of-box two levels

• There were over 36 Services and we have been able to consolidate them down to 25. We will continue to make adjustments and consolidate as needed.
## Incident Categorization: Field Mappings

<table>
<thead>
<tr>
<th>Old Categorization Fields</th>
<th>New Categorization Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configuration Item</td>
<td>Configuration Item</td>
</tr>
<tr>
<td>Record Type</td>
<td>Record Type</td>
</tr>
<tr>
<td>Category 1</td>
<td>Service <em>(list will display Service from CMDB)</em></td>
</tr>
<tr>
<td>Category 2</td>
<td>Category</td>
</tr>
<tr>
<td>Category 3</td>
<td>Subcategory</td>
</tr>
</tbody>
</table>
Categorization: Services in CMDB

Academic Course Delivery and Support
  * Application Management

Business Information Management

Classroom Technology and AV Support

Collaboration and Conferencing
  * Database Management
  * Desktop Management

Development and Alumni Relations

Document Management

Email and Messaging
  * Facilities Management

Financial Application Support

Human Resources Application Support

Identity and Access Management
  * Network Management
  * Print Management
  * Security Management
  * Server Management
  * Service Desk
  * Service Management

Staff-Faculty Technology Support

Storage Management

Student Technology

Video Technologies

Voice Service

Web Management

* Indicates Service is equivalent to a prior Category 1 option
## Categorization: Category 1 to Service Map

<table>
<thead>
<tr>
<th>Previous Category 1</th>
<th>New Service Mapping</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Management</td>
<td>Application Management</td>
</tr>
<tr>
<td>Communication &amp; Messaging</td>
<td>Email and Messaging</td>
</tr>
<tr>
<td>Course Management</td>
<td>Academic Course Delivery and Support</td>
</tr>
<tr>
<td>Database Management</td>
<td>Database Management</td>
</tr>
<tr>
<td>Desktop Management</td>
<td>Desktop Management</td>
</tr>
<tr>
<td>Facilities Management</td>
<td>Facilities Management</td>
</tr>
<tr>
<td>Knowledge Management</td>
<td>Service Management</td>
</tr>
<tr>
<td>Network Management</td>
<td>Network Management</td>
</tr>
<tr>
<td>Print Management</td>
<td>Print Management</td>
</tr>
<tr>
<td>Security Management</td>
<td>Security Management</td>
</tr>
<tr>
<td>Server Management</td>
<td>Server Management</td>
</tr>
<tr>
<td>Service Desk</td>
<td>Service Desk</td>
</tr>
<tr>
<td>Service Management</td>
<td>Service Management</td>
</tr>
<tr>
<td>Telephony Management</td>
<td>Voice Service</td>
</tr>
</tbody>
</table>
Incident Categorization: Dependencies

• **Field Dependencies**
  
  – **Category** shows values based on the **Service** selected
  
  – **Subcategory** shows values based on **Category** selected
  
  – **Assignment Group** populates based on **Auto-Routing**
    Rules calculated from one or more of the fields below
    
    • Reported For User’s Division
    • Reported For User’s Department
    • Configuration Item
    • Service
    • Category
    • Subcategory

**NOTE:** If you find the routing is incorrect, select “Routing Error” as the Manual Routing Reason and the ITSMO will review.
Service Level Agreements (SLAs)

• The previous custom fields "Response SLA Status" and "Resolution SLA Status" have been replaced by the single field "SLA Due”

• This field is visible on the Incident form and the list view

• The field will always show the next upcoming SLA due date and time
  – Typically it will show the Response SLA due date first, and once that is SLA is met, it will switch to showing the Resolution SLA due date

• The color of the field will change from ‘green > yellow > orange > red’ as the status progresses through the warning thresholds of 75%, 90%, and 100% (breached)

• From the list view, Incident tickets can now be sorted according to SLA Due date, and the thresholds will be visible as a colored dot indicator

• There will no longer be banner warning messages on the Incident form itself
  – You can still view the full SLA details on the Task SLA tab, as nothing has changed with the actual SLA functionality
SLA Email Notifications

• Email Notifications: *In progress*
  
  – Notifications to "Assigned To" person will be sent at these intervals: 75%, 90%, & 100% (Breached)
  
  – Notifications for other roles (incident coordinators, managers, and incident managers) will not be complete in time for the upgrade but will be added at a later date.
SLAs and Pending Codes

• The available *Pending Code* options have been updated:
  • User Action Required
  • Third Party Vendor Action
  • Task Completion
  • Approval
  • Change

• The *Pending Code* for "Third Party Vendor Action" will no longer pause the SLA clock
  • Cross-campus leadership made a decision to implement this change as a way to provide more visibility into our vendor relationships
Templates

- **Toggle Template Bar** option is found by clicking the *ellipsis icon (…)* in upper right-hand corner.

- The **Template Bar** is located at bottom of form.
Incident Tasks

• The previous Incident Task feature was custom built and it has been replaced with an out-of-box option.

• The old Tasks have a prefix of “TASK” and the new Tasks have prefix of “ITSK”.

• Any templates you have created for Incident Tasks will need to be rebuilt with the new fields.
Incident Tasks

• Both the OLD and NEW Incident Tasks will be shown as a related list on the Incident form.

• Users will need to complete old tasks or manually migrate them to the new tasks list.
Service Portal for Self Service
System Status on Service Portal

- A notice will appear in **System Status** section for **Major Incidents** and **Service Impacting Advisories**.
System Status on Service Portal

- **More Information** will give specific details. This information will be emailed to those subscribed to the Service.
Subscribing to Major Incident Notifications

- Users can now select for which **Service(s)** they want to receive email notices
- The envelope icon displays if subscribed

<table>
<thead>
<tr>
<th>Status History</th>
<th>Feb 3</th>
<th>Feb 4</th>
<th>Feb 5</th>
<th>Feb 6</th>
<th>Feb 7</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Business Service</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Academic Course Delivery and Support</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Application Management</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Business Information Management</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Classroom Technology and AV Support</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Collaboration and Conferencing</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Database Management</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Development and Alumni Relations</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Document Management</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Email and Messaging</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Facilities Management</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
</tbody>
</table>

Legend:
- ✔ No issues
- i Planned maintenance
- 🔴 Service degradation
- 🚨 Outage
- 🚩 Multiple issues

**Not subscribed**
Subscribing to Major Incident Notifications

• When a **Service** is selected the user will see an option to *subscribe* or *unsubscribe* to **Service** Status Updates
Retired Fields and Migrating Data
Migrating to Out-of-Box Fields

• Custom fields were replaced with OOB fields whenever possible for Incident, Incident Task and Knowledge.

• Emory field names were used in place of OOB names when appropriate.

• Approach taken for migrating custom fields to OOB fields
  – If an OOB field existed, the custom field was replaced
  – A ‘z_’ was placed in front of the field name
  – If possible, data from the custom field was imported to the OOB field
User Action Required

• Review the below locations for custom fields that are no longer in use and remove or update as needed. *Example: ‘z_Category 2’ should be updated to ‘Subcategory’*
  - Reports (Personal and Group)
  - Incident Templates
  - Filters
  - Homepage Content
  - All Incident Task Templates
    • Take a screen shot of your Task Template before go-live
    • Rebuild the template using the OOB equivalent fields

• **Global Reports** will be reviewed and updated by ITSMO

• **A Data Mapping Guide** will be posted to the SMCC website
Training Materials and Known Defects

• Training materials and links to knowledge articles are posted at smcc.emory.edu

• Known defects are posted to KB05519

• Defects you encounter after upgrade
  – Review KB KB05519 for list of known defects
  – If new defect, submit ticket through ServiceNow

• For additional questions, contact the IT Service Management Office at itsmo@emory.edu
## Training Materials: Knowledge Articles

<table>
<thead>
<tr>
<th>KB Number</th>
<th>Article Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>KB05511</td>
<td>How to create a Quick Email Template</td>
</tr>
<tr>
<td>KB02768</td>
<td>New ServiceNow Template Menu (Template Auto-fill Capability)</td>
</tr>
<tr>
<td>KB05519</td>
<td>ServiceNow Helsinki FAQ and Current Defects</td>
</tr>
</tbody>
</table>
Thank You!