



EMORY
LIBRARIES &
INFORMATION
TECHNOLOGY

ServiceNow Helsinki Upgrade Training Session

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IT Service Management Office

Training Session Objectives

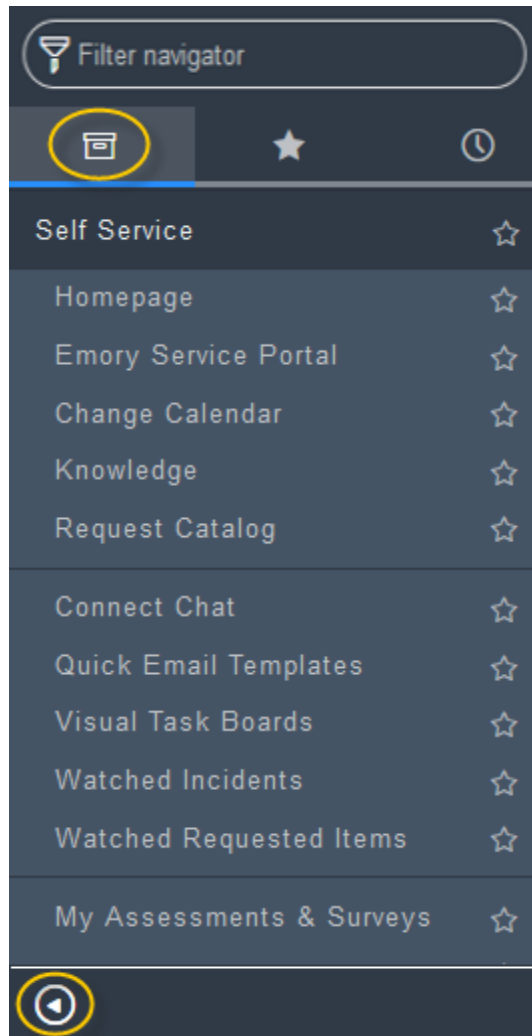
- New User Interface (UI)
- Knowledge Base Updates
 - Knowledge including Submission Form
 - Multiple Knowledge Bases
- Incident & Task Forms with Knowledge Integration
 - Custom Field Migration to Out-of-Box Fields
 - Incident Categorization
 - Service Level Agreements (SLAs)
- Service Portal for Self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



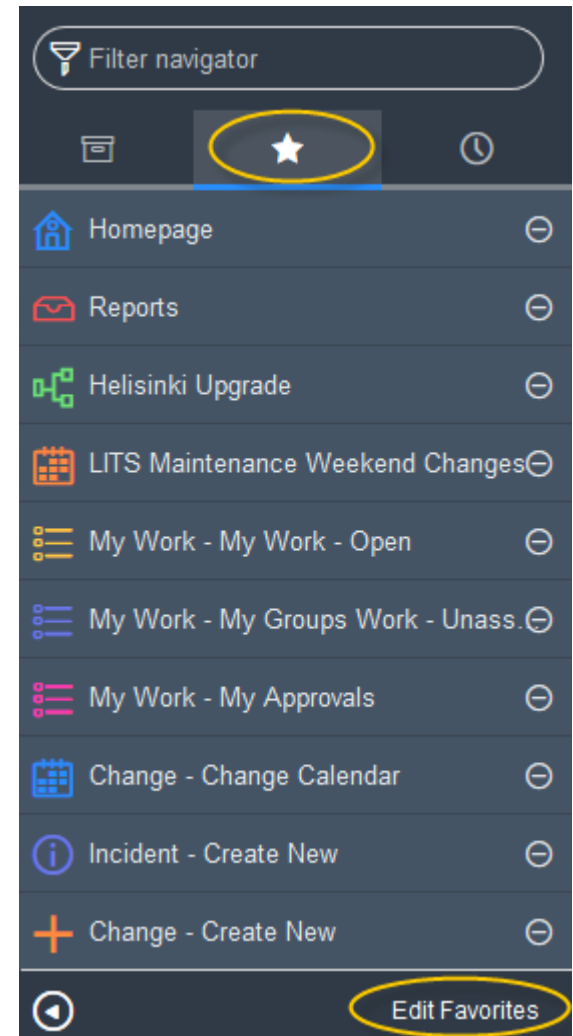
New User Interface



New UI Bookmarks and Favorites

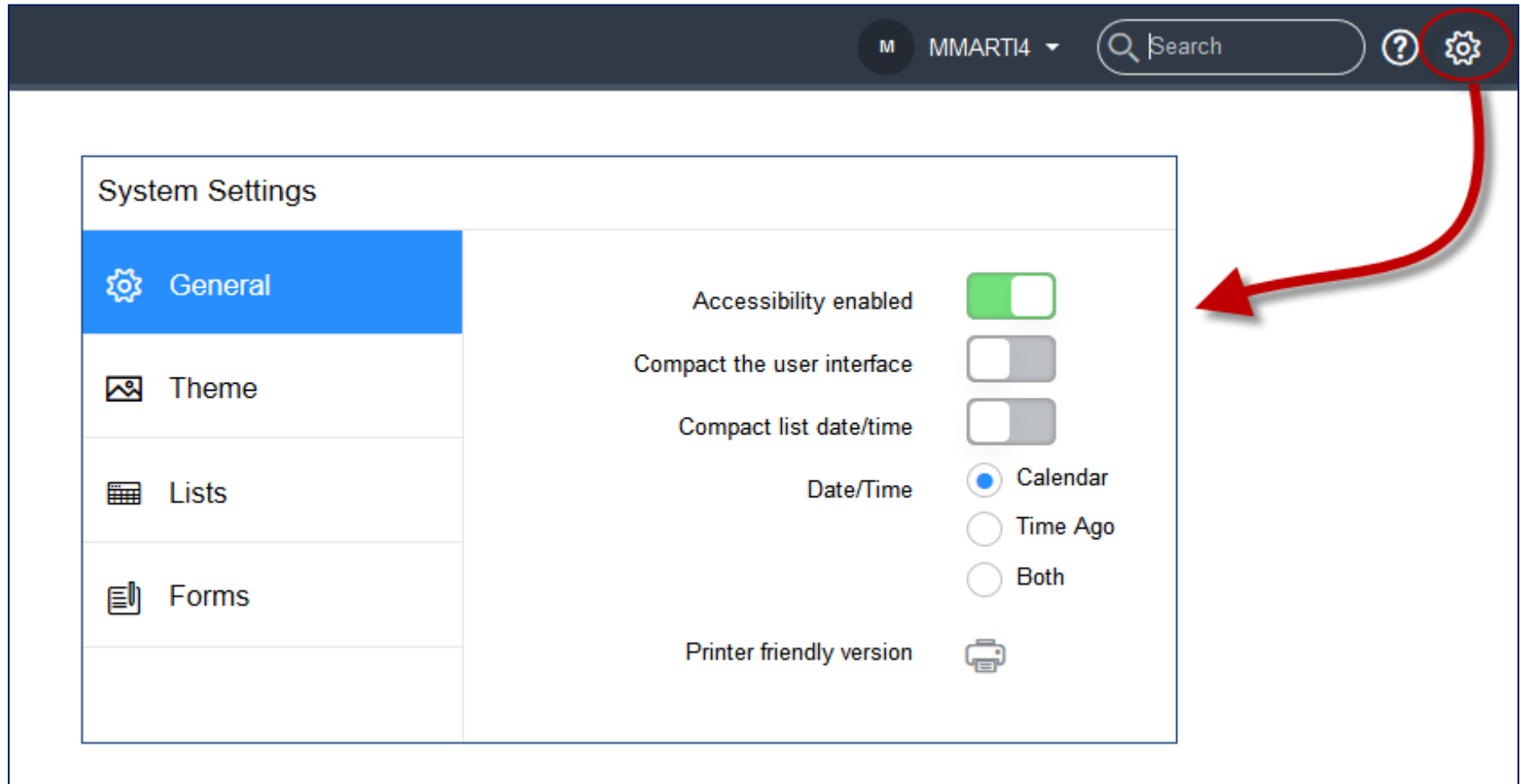


- Power Edge removed
- Double-click **Box Icon** to collapse or expand all applications
- **Edit Favorites** allows user to change colors, icons and re-sort list
- Close **Navigation Bar** and the **Favorite** icons stay on the edge
- **Clock** will show a listing of users activity history




New UI System Settings (gear icon)

Users can **personalize** their settings

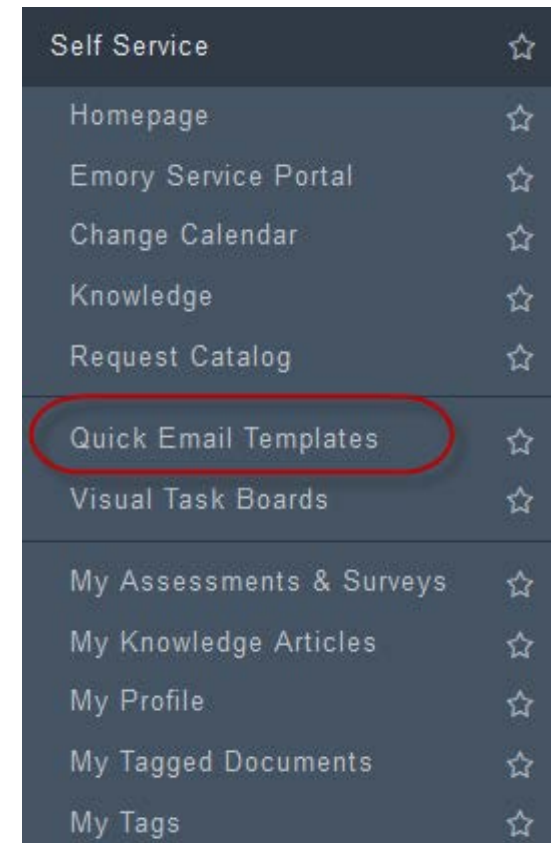


The screenshot displays the 'System Settings' interface. At the top right, a gear icon is circled in red, with a red arrow pointing to the 'System Settings' panel. The panel is titled 'System Settings' and features a sidebar with four categories: 'General' (selected), 'Theme', 'Lists', and 'Forms'. The 'General' section contains the following settings:

- Accessibility enabled:
- Compact the user interface:
- Compact list date/time:
- Date/Time: Calendar, Time Ago, Both
- Printer friendly version: 

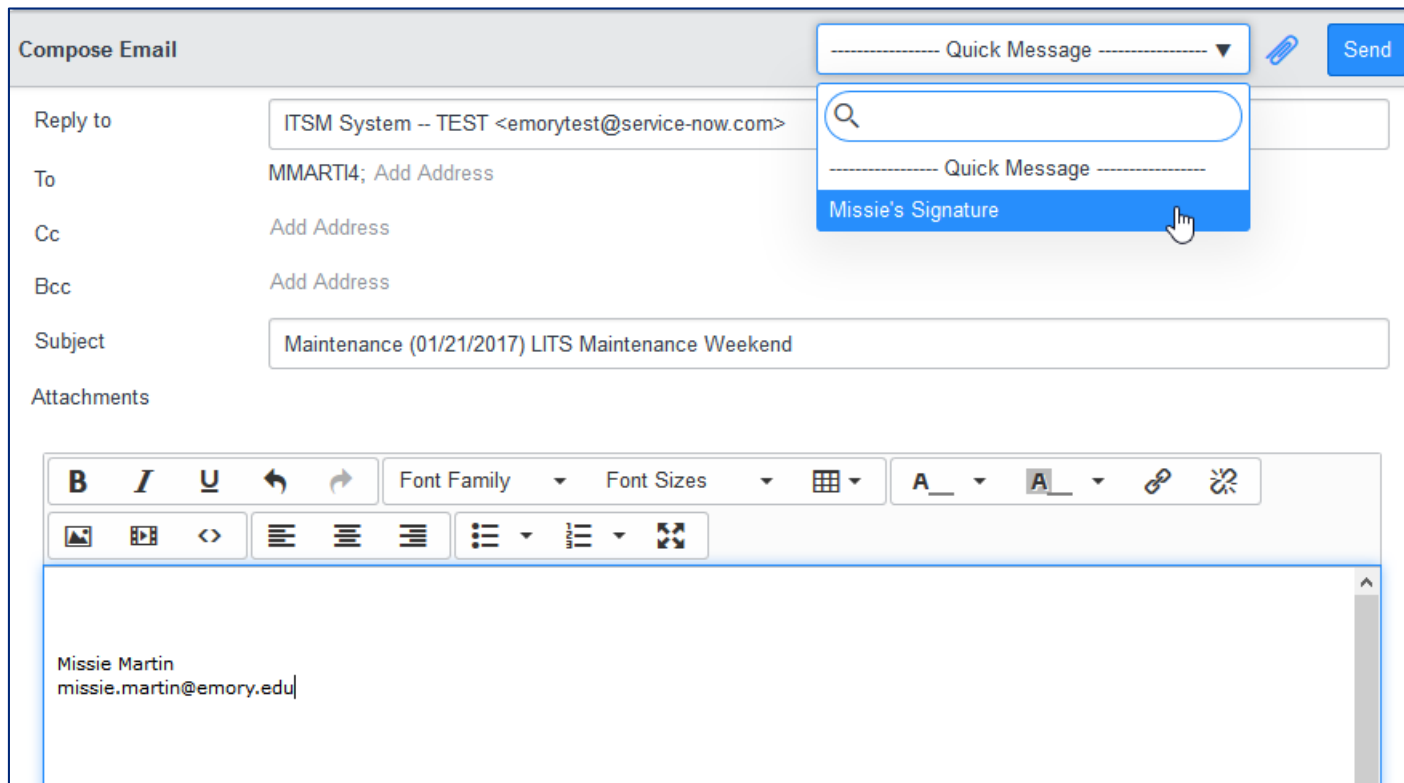
New Feature: Quick Email Templates

- 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 Base Updates



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

Filter navigator

KB Submission - SUB10082

Submit Send for Review

Number: SUB10082

Status: Draft

Author: MMART4

Knowledge article:

* Assignment group: LITS: ITSMO

Configuration item: ServiceNow

Attachment link:

Display attachments:

Knowledge champion group: LITS Knowledge Champions

* Knowledge champion: MMART4

Knowledge base: Information Technology(IT)

KB category: Process



* Short description: Test for Training

Text

This is a test article.

Multiple Knowledge Bases

All

Knowledge Bases

Information Technology(IT)
0 Questions and 495 Articles

Self-Service
0 Questions and 741 Articles

Service Desk
0 Questions and 35 Articles

Social QA
19 Questions and 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 - INC02598288 Submit Resolve Incident

Number	INC02598288	Opened	2017-01-22 09:17 PM
* Reported by	MMARTI4	State	New
Name	Missie Martin	Pending Code	-- None --
Phone	4046862827	EHC ticket number	
Email	missie.martin@emory.edu	Transfer to EHC	-- None --
Reported for	MMARTI4	Knowledge article	
Location	1784 N Decatur Rd	Suppress notification	<input type="checkbox"/>
* Reported source	-- None --	Caused by change	
		RFC	
		SLA due	2017-01-17 05:00 PM
Sticky notes (information stays with user)	supported by LITS: client services	Special instructions (only for this incident)	
* 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

* Short description Request Box Sponsored Account

Related Search Results ▾

Sponsored Account Access to Emory Box	, please refer to KB00188 for instructions on how to request a sponsored account. The Emory Box account... and functionality ...	Preview	Attach
Box Service Desk Reference Guide	- Group Emory Box Account Request Procedures KB04114- Sponsored Emory Box Account Procedures...-provided Box ...	Preview	Attach
Box: Sponsored Account Access	Complete this form to allow a sponsored account user access to Emory Box	Preview	Order
Listing and Renewing your Sponsored Acco...	that would ordinarily happen as the result of the account expiring, open a generic service request ticket... selected accounts whose expiration d...	Preview	Attach
Vidyo FAQ	. If a non-Emory person needs to host meetings, we recommend obtaining an Emory sponsored account. These can be requested through the Service Now ...	Preview	Attach

Show more


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

The screenshot displays a software interface with three tabs: 'Categorization', 'Activities' (highlighted with a red box), and 'Resolution'. Below the tabs, there are two main sections: 'Public Notes CC' and 'Work notes list', each with lock and user icons. The 'Public notes' section is labeled '(emailed to the user) (Customer visible)' and contains a large text input field. Below this, there is a toggle for 'Work notes' (unchecked) and a 'Post' button. A red dashed arrow points from the text 'Toggle between Public Notes and Work Notes' to the 'Work notes' toggle. The 'Work notes' section is highlighted with a blue box and contains a text input field, a 'Post' button, and a checked 'Work notes' toggle.

Activity Log

Activity

System 2017-01-22 07:02 AM 


 Email sent

Subject: ASSIGNED: Incident INC02617097 has been assigned to you

From: ITSM System -- TEST

To: al.shelton@emory.edu

[Show email details](#)

 Al Shelton 2017-01-22 07:02 AM

Assigned to ASHELTO

Reported by ASHELTO

Configuration item ServiceNow

Detailed description This is a test This is a test This is a test This is a test This is a test

Impact 3 - Moderate/Limited

z_Incident state Assigned

Priority 2 - High

Short description Testing Categories

- 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

Old Categorization Fields	New Categorization Fields
Configuration Item	Configuration Item
Record Type	Record Type
Category 1	Service <i>(list will display Service from CMDB)</i>
Category 2	Category
Category 3	Subcategory

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

Previous Category 1	New Service Mapping
Application Management	Application Management
Communication & Messaging	Email and Messaging
Course Management	Academic Course Delivery and Support
Database Management	Database Management
Desktop Management	Desktop Management
Facilities Management	Facilities Management
Knowledge Management	Service Management
Network Management	Network Management
Print Management	Print Management
Security Management	Security Management
Server Management	Server Management
Service Desk	Service Desk
Service Management	Service Management
Telephony Management	Voice Service

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

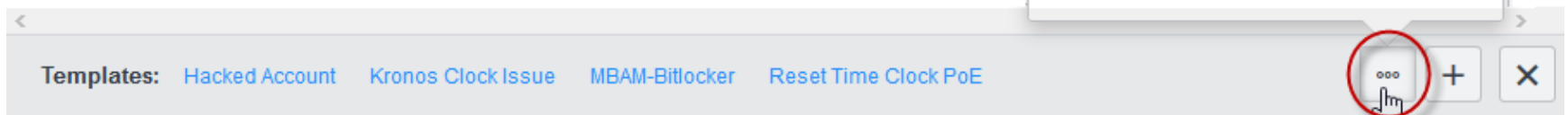
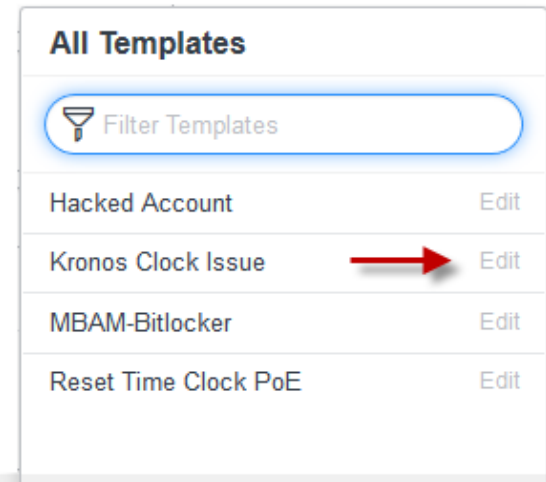
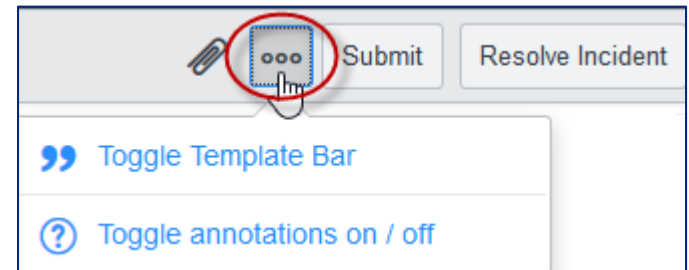
- **Email Notifications:** *In progress*
 - Notifications to "Assigned To" person will be sent at these intervals: **75%, 90%, & 100% (Breached)**
 - Notifications for other roles (incident coordinators, managers, and incident managers) will not be complete in time for the upgrade but will be added at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

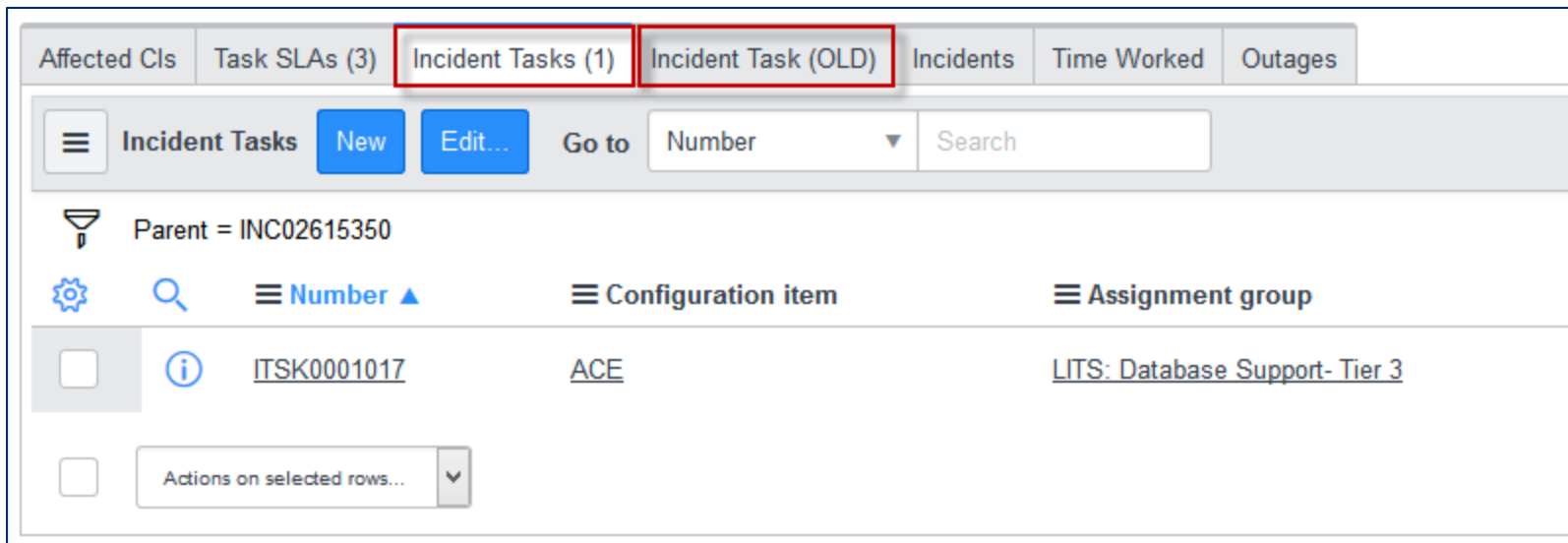


Incident Tasks

- 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.



The screenshot displays a web interface for managing incident tasks. At the top, there are several tabs: 'Affected CIs', 'Task SLAs (3)', 'Incident Tasks (1)', 'Incident Task (OLD)', 'Incidents', 'Time Worked', and 'Outages'. The 'Incident Tasks (1)' and 'Incident Task (OLD)' tabs are highlighted with red boxes. Below the tabs, there is a header section with a menu icon, the text 'Incident Tasks', and buttons for 'New' and 'Edit...'. To the right of these buttons is a 'Go to' field with a dropdown menu set to 'Number' and a search input field. Below the header, there is a filter section with a funnel icon and the text 'Parent = INC02615350'. The main content area is a table with columns for 'Number', 'Configuration item', and 'Assignment group'. The table contains one row with the following data: 'ITSK0001017', 'ACE', and 'LITS: Database Support- Tier 3'. At the bottom left of the table, there is a checkbox and a dropdown menu labeled 'Actions on selected rows...'. The table is styled with a light gray background and blue accents for the header and filter sections.



Service Portal for Self Service

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EMORY
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Office of
Information Technology



How can we help?

How can we help?



Request Something

Browse the catalog for services and items you need



Knowledge Base

Browse and search for articles, rate or submit feedback



Something's Broken

Contact support to report an incident



Community

Social QA-sourced answers to your questions

System Status

Service Impacting - ServiceNow
(started 2017-01-16 05:55 PM)

[More information...](#)

[Chat with Live Support](#)

Avg wait: 1 Minute

My Approvals

You have no pending approvals

My Open Incidents

No records found

Popular Questions

Most Viewed Articles

[Creating/Deleting a Sponsored Account](#)

183605 Views

[How to Configure a Device for](#)

[External Display](#)

My Service Requests

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**.

System Status

We constantly monitor our services and their related components. If there is ever a service interruption, a notification will be posted to this page. If you are experiencing problems not listed on this page, you can submit a request for service.

Major Incident - Wireless (started 2017-02-09 02:46 PM)
Details: EmoryUnplugged is currently unavailable. Technicians are working to resolve the issue. No ETA.
Features unavailable: All
Locations affected: All University locations
Users affected: All

Service Impacting - Voice Service (started 2017-02-09 03:08 PM)
Details: Digital faxes via the Emedius service are delivering successfully but may contain illegible lines.
Features unavailable: Digital Faxes
Locations affected: All
Users affected: All

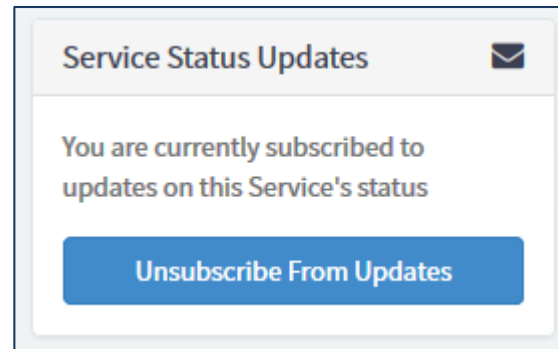
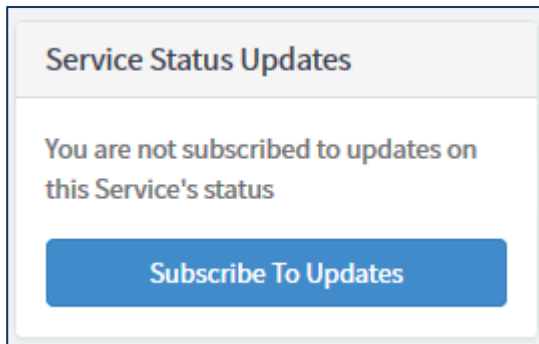
Subscribing to Major Incident Notifications

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

Status History	Feb 3	Feb 4	Feb 5	Feb 6	Feb 7	Legend
Business Service						
<input checked="" type="checkbox"/> Academic Course Delivery and Support	✓	✓	✓	✓	✓	✓ No issues
<input checked="" type="checkbox"/> Application Management	✓	✓	✓	✓	✓	i Planned maintenance
<input checked="" type="checkbox"/> Business Information Management	✓	✓	✓	✓	✓	- Service degradation
<input checked="" type="checkbox"/> Classroom Technology and AV Support	✓	✓	✓	✓	✓	! Outage
<input checked="" type="checkbox"/> Collaboration and Conferencing	✓	✓	✓	✓	✓	+ Multiple issues
<input checked="" type="checkbox"/> Database Management	✓	✓	✓	✓	✓	
<input checked="" type="checkbox"/> Development and Alumni Relations	✓	✓	✓	✓	✓	
Document Management ← Not subscribed	✓	✓	✓	✓	✓	
<input checked="" type="checkbox"/> Email and Messaging	✓	✓	✓	✓	✓	
<input checked="" type="checkbox"/> Facilities Management	✓	✓	✓	✓	✓	

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

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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

KB Number	Article Description
KB05511	How to create a Quick Email Template
KB02768	New ServiceNow Template Menu (Template Auto-fill Capability)
KB05519	ServiceNow Helsinki FAQ and Current Defects

Thank You!