

ServiceNow: IT Support Operations Guide

Covers Incident Management, Request Fulfilment, Knowledge Management and Basic Reporting

1. Introduction to ServiceNow

What is ServiceNow?

ServiceNow is a robust cloud-based platform for IT Service Management that helps organisations streamline their IT operations. By centralising and automating crucial processes such as Incident Management, Change Management and Request Fulfilment.

ServiceNow enables IT Support teams to address issues more efficiently and effectively. This not only improves the speed and quality of service delivery but also enhances communication with end-users, making it an essential tool in today's IT environments.

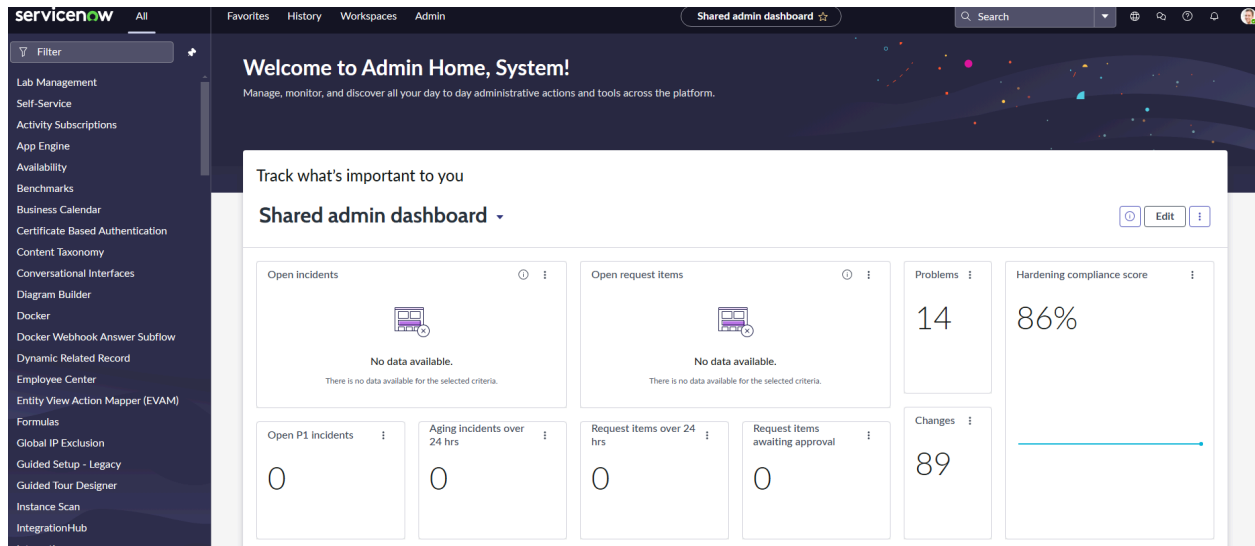
Before starting, I'd highly recommend using the NowLearning side of ServiceNow. Go through the free tutorials for the “ServiceNow: IT Support Specialist” pathway. The first main module will put you straight into an environment of ServiceNow from requesting an instance, and it's completely free! It already has some data in there for you to work with.

The screenshot displays the ServiceNow NowLearning user interface. At the top, a blue banner promotes a 'Level-Up Your Career with ServiceNow - A Now Learning Community Event'. Below this, the 'SERVICE NOW LEARNING' logo is visible alongside a search bar and user profile 'Ervin Thorpe'. The main content area is divided into a left sidebar and a central panel. The sidebar, titled 'ON-DEMAND COURSE', shows a 'Welcome to ServiceNow' course with a 'Complete' status. The central panel displays the 'Virtual Agent Lesson' content, including a 'Welcome to ServiceNow (Course)' breadcrumb, the lesson title, and a 'Virtual Agent Lesson' subtitle. Below the title, there are three informational boxes: 'INSTANCE STATUS' (Running, with 'Open My Instance' and 'Terminate Instance' links), 'Your instance will expire in...' (7 Days 15 Hours 23 Minutes, with 'Request Expiry Extension' link), and 'You have...' (2 extensions remaining, 5 instances remaining). A large green message states 'Congratulations! You have completed this content.' with a graduation cap icon and a 'Review' button. The bottom of the sidebar lists various modules and their lesson counts: 'Next Experience, Navigation, and Access Module' (3 LESSONS), 'Lists and Filters Module' (2 LESSONS), 'Forms Module' (2 LESSONS), 'Tasks Module' (2 LESSONS), 'Reporting Module' (2 LESSONS), 'Knowledge Management Module' (2 LESSONS), and 'Service Catalog Module'.

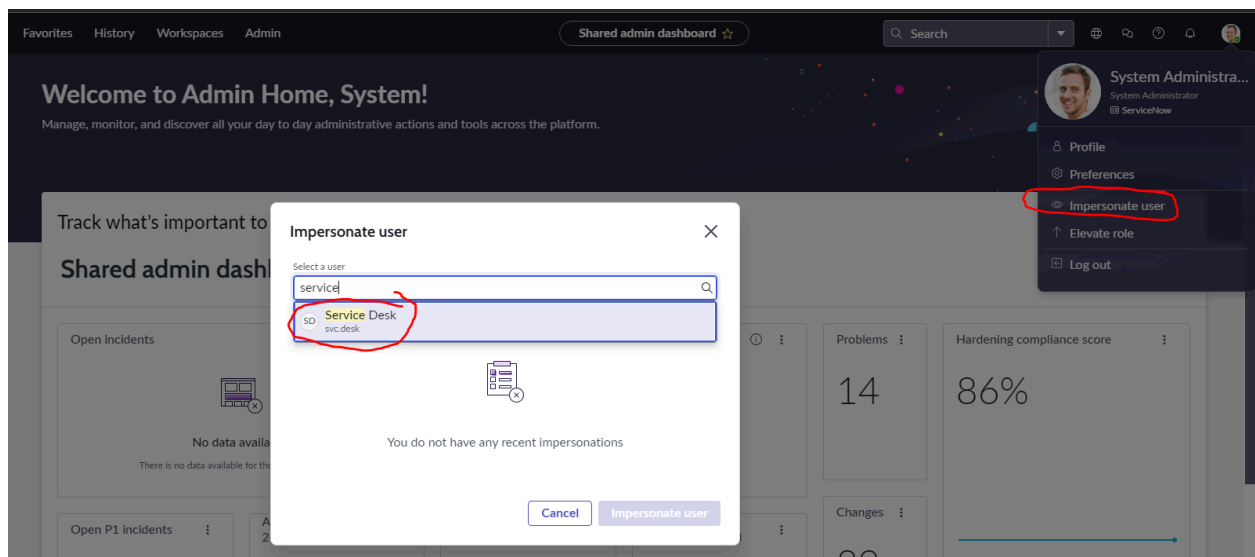
ServiceNow Interface Overview

A brief tour of the ServiceNow interface, focusing on the areas most relevant to IT Support, such as the Service Desk and Incident Management modules.

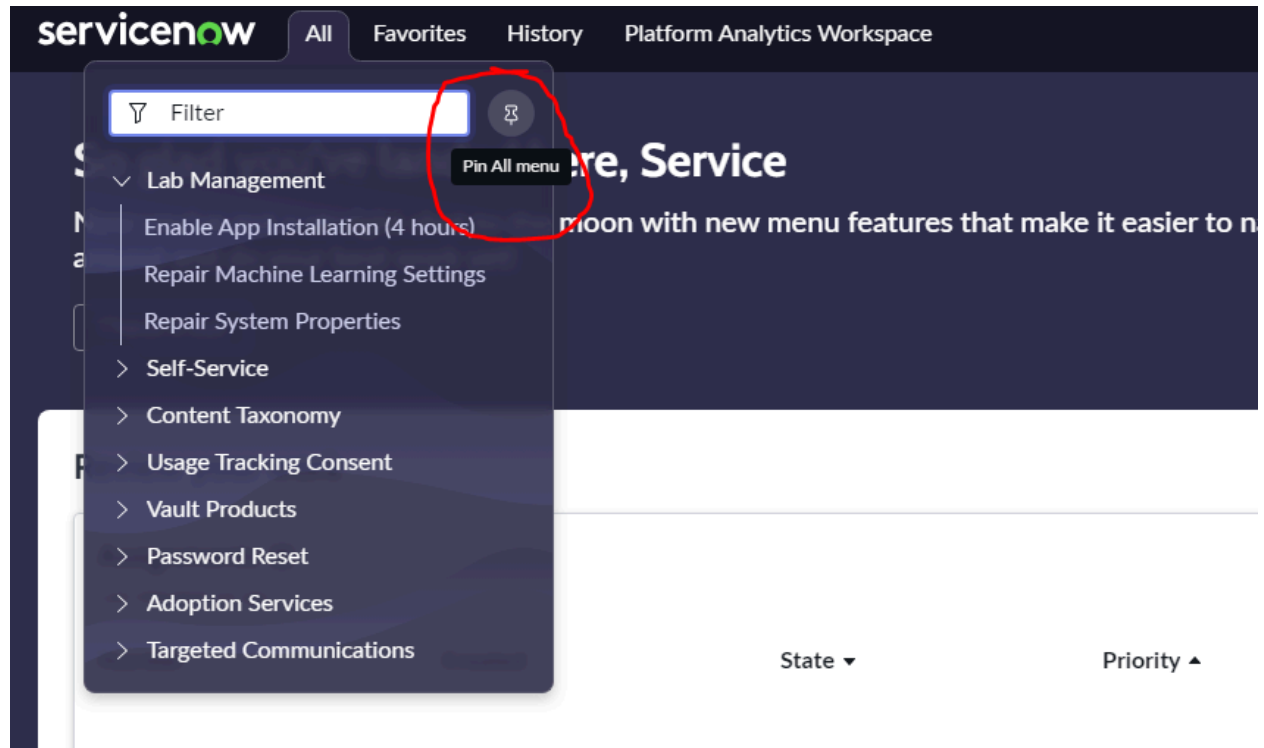
Understanding the Dashboard



- Everything is shown in this section and that's because this is the administrator role with all tools available.



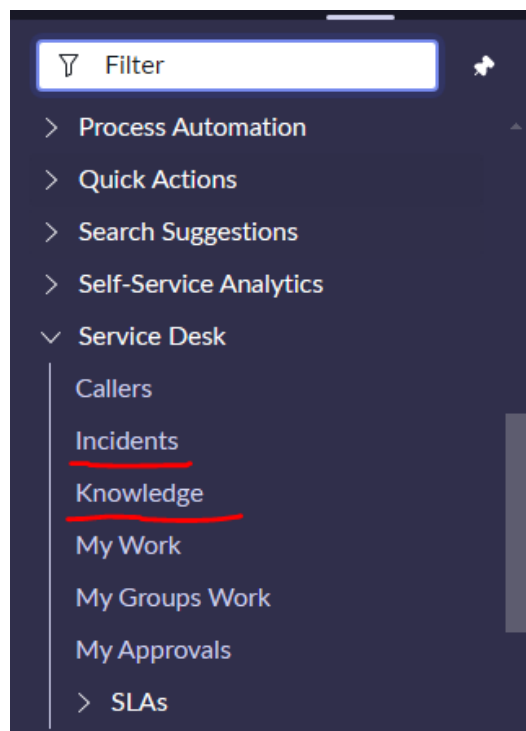
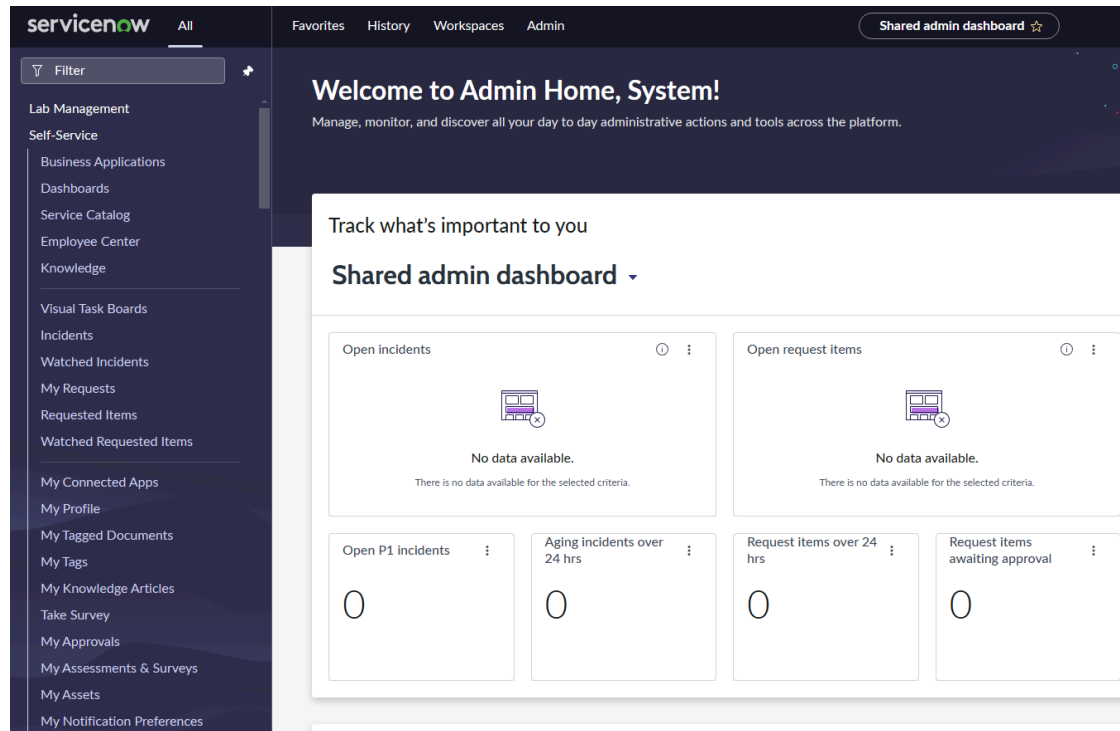
- We are also able to impersonate ourselves for a different role. In this case, I've selected Service Desk.



- As we can see, this has significantly reduced the number of tools that we can use. This is normally how it is in a real environment. You'd want certain roles to have limitations to resources to avoid accidental errors and conflicts.
- Personally, I like to "Pin All menu" to always keep this menu on the side

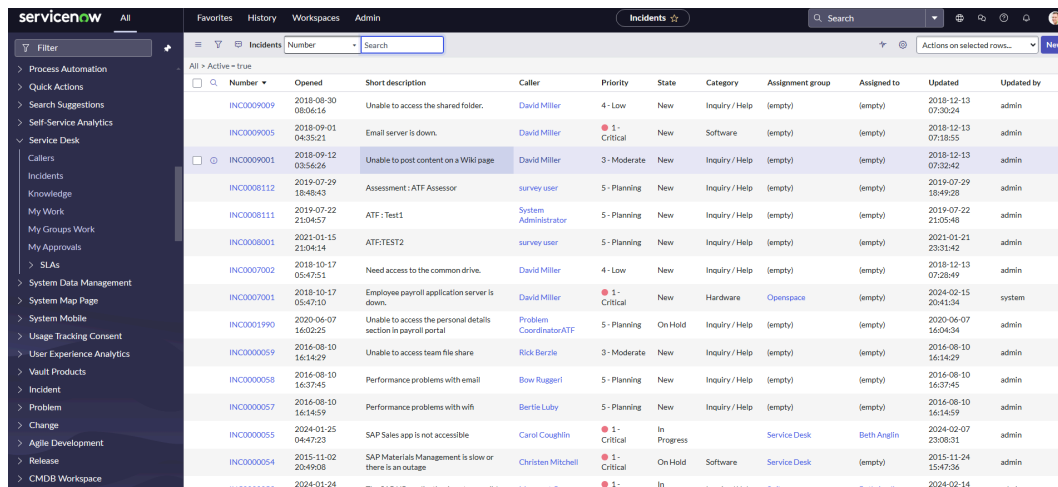
Core IT Support Functions

For this section, we'll go back to the Administrator role but focus on the Service Desk section



- We'll go over Incidents, Knowledge and also Request - even if it's not shown here. It's often covered by many companies in service desk roles.

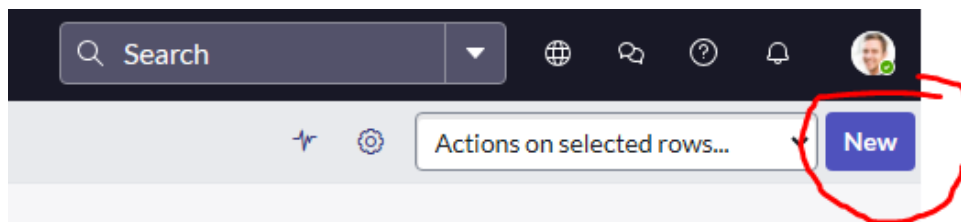
Incident Management



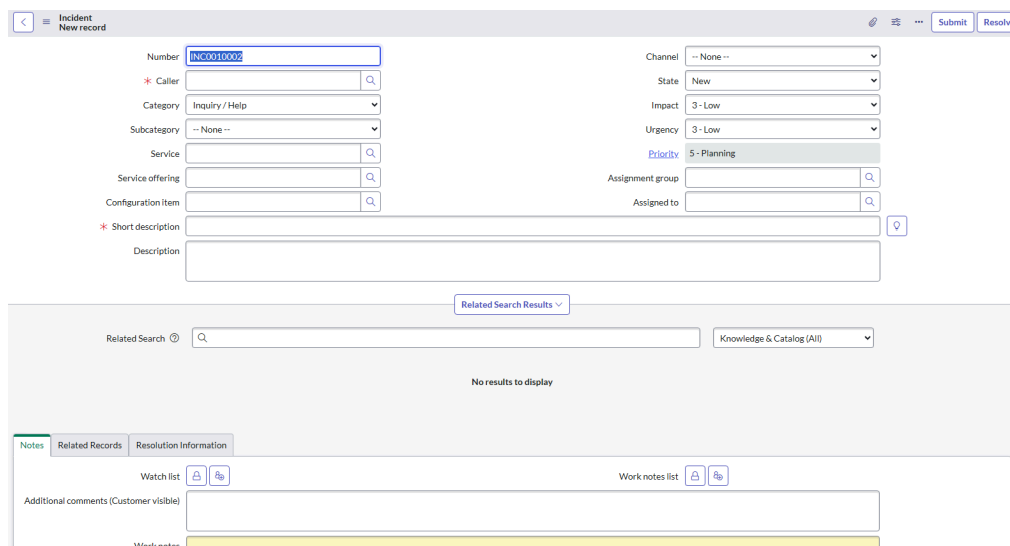
Number	Opened	Short description	Caller	Priority	State	Category	Assignment group	Assigned to	Updated	Updated by
INC0009009	2018-08-30 08:06:16	Unable to access the shared folder.	David Miller	4 - Low	New	Inquiry / Help	(empty)	(empty)	2018-12-13 07:30:24	admin
INC0009005	2018-09-01 04:35:21	Email server is down.	David Miller	1 - Critical	New	Software	(empty)	(empty)	2018-12-13 07:18:55	admin
INC0009001	2018-09-12 03:56:29	Unable to post content on a Wiki page	David Miller	3 - Moderate	New	Inquiry / Help	(empty)	(empty)	2018-12-13 07:32:42	admin
INC0008112	2019-07-29 18:48:43	Assessment : ATF Assessor	survey user	5 - Planning	New	Inquiry / Help	(empty)	(empty)	2019-07-29 18:49:28	admin
INC0008111	2019-07-22 21:04:57	ATF : Test1	System Administrator	5 - Planning	New	Inquiry / Help	(empty)	(empty)	2019-07-22 21:05:48	admin
INC0008001	2021-01-15 21:04:14	ATF:TEST2	survey user	5 - Planning	New	Inquiry / Help	(empty)	(empty)	2021-01-21 23:31:42	admin
INC0007002	2018-10-17 05:47:51	Need access to the common drive.	David Miller	4 - Low	New	Inquiry / Help	(empty)	(empty)	2018-12-13 07:28:49	admin
INC0007001	2018-10-17 05:47:10	Employee payroll application server is down.	David Miller	1 - Critical	New	Hardware	Openspace	(empty)	2024-02-15 20:41:34	system
INC0001990	2020-06-07 16:02:25	Unable to access the personal details section in payroll portal	Problem Coordinator ATF	5 - Planning	On Hold	Inquiry / Help	(empty)	(empty)	2020-06-07 16:04:34	admin
INC0000059	2016-08-10 16:14:29	Unable to access team file share	Rick Berzle	3 - Moderate	New	Inquiry / Help	(empty)	(empty)	2016-08-10 16:14:29	admin
INC0000058	2016-08-10 16:37:45	Performance problems with email	Bow Ruggeri	5 - Planning	New	Inquiry / Help	(empty)	(empty)	2016-08-10 16:37:45	admin
INC0000057	2016-08-10 16:14:59	Performance problems with wifi	Bertie Luby	5 - Planning	New	Inquiry / Help	(empty)	(empty)	2016-08-10 16:14:59	admin
INC0000055	2024-01-25 04:47:23	SAP Sales app is not accessible	Carol Coughlin	1 - Critical	In Progress		Service Desk	Beth Anglin	2024-02-07 23:08:51	admin
INC0000054	2015-11-02 20:49:08	SAP Materials Management is slow or there is an outage	Christen Mitchell	1 - Critical	On Hold	Software	Service Desk	(empty)	2015-11-24 15:47:36	admin
INC0000053	2024-01-24	This SAP QM notification is not accessible	Monica Gomez	1 - Critical	In	Insider / Vendor	Customer	Doris Raulo	2024-02-14	admin

- This is where all incidents are setup. Here you can log, manage, prioritise, categorise, and communicate with users about these incidents. We'll cover all of this:

Incidents: Logging, Prioritising & User Communication



- Select New



Number: INC0010009

Caller: *

Category: Inquiry / Help

Subcategory: -- None --

Service: *

Configuration item: *

Short description: *

Description: *

Channel: -- None --

State: New

Impact: 3 - Low

Urgency: 3 - Low

Priority: 5 - Planning

Assignment group: *

Assigned to: *

Related Search Results

Related Search: [Search] Knowledge & Catalog (All)

No results to display

Notes

Resolution Information

Watch list

Work notes list

Additional comments (Customer visible)

Work notes

- This is where you can write up a new incident. As we can see, there's a lot of blank parts. Let's fill them in.

Incident New record

Number: INC0010002

* Caller: Alene Rabeck

Category: Software

Subcategory: Email

Service:

Service offering:

Configuration item:

Channel: -- None --

State: New

Impact: 3 - Low

Urgency: 1 - High

Priority: 3 - Moderate

Assignment group:

Assigned to:

* Short description: Email Change Request - Urgently Needs to be Changed

Description: Alene has updated their email and requests for an urgent change. They need it done before the day ends due to deadlines.

Related Search Results

Related Search: Email Change Request - Urgently Needs to be Changed

Knowledge & Catalog (All)

Request email alias	Request for email alias	Order
New Email Account	New Email Creation	Order
Request Security Escort	Request a security escort	Order
International Plan Request	International Plan Request	Order
Request Knowledge Base	Request for a Knowledge Base	Order

- As you can see, we have logged this incident by assigning the caller, the category it's under, the subcategory, the description of the incident and the priority.
- We also have a knowledge base we can refer to if we need additional information

Notes

Watch list

Work notes list

Additional comments (Customer visible): Hi Alena, We've logged this incident up in our system. We will work on resolving your issue as fast as possible.

Work notes: Keep record of email changes incase for future incidents. Old email was Alena-Rabeck@WhackyMail.com.

Submit

Resolve

- We can also communicate with the user while keeping work notes - not viewable by the users.
- We can then submit.

Incidents											
Number	Opened	Short description	Caller	Priority	State	Category	Assignment group	Assigned to	Updated	Updated by	
INC0010002	2024-08-11 16:41:32	Email Change Request - Urgently Needs to be Changed	Alene Rabeck	3 - Moderate	New	Software	(empty)	(empty)	2024-08-11 16:58:58	admin	
INC0009009	2018-08-30 08:06:16	Unable to access the shared folder.	David Miller	4 - Low	New	Inquiry / Help	(empty)	(empty)	2018-12-13 07:30:24	admin	
INC0009005	2018-09-01 04:35:21	Email server is down.	David Miller	1 - Critical	New	Software	(empty)	(empty)	2018-12-13 07:18:55	admin	

- From here we can see that the incident has now been logged. Only issue is, we haven't assigned it to any group! So let's go and correct this.

Incident - INC0010002

Number: INC0010002

* Caller: Alene Rabeck

Category: Software

Subcategory: Email

Service:

Service offering:

Configuration item:

* Short description: Email Change Request - Urgently Needs to be Changed

Description: Alene has updated their email and requests for an urgent change. Requested email change is Alene-Rabeck@gmail.com. They need it done before the day ends due to deadlines.

Channel: -- None --

State: New

Impact: 3 - Low

Urgency: 1 - High

Priority: 3 - Moderate

Assignment group: Service Desk

Assigned to:

- The correct assignment group is now done. We can now update this ticket.

INC0010002	2024-08-11 16:41:32	Email Change Request - Urgently Needs to be Changed	Alene Rabeck	3 - Moderate	New	Software	Service Desk	(empty)	2024-08-11 17:04:07	admin
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Categorising & Managing Incidents

We can categorise the different incidents by filtering what we need

Incidents

Category:

Search:

Run Save... AND OR Add Sort

All of these conditions must be met

State is New AND OR

or State is In Progress

Assignment group is Service Desk AND OR

- We click on the filter button, then we setup conditions to fit it for the needs we want. In this case, I want to see all the "new" and "in progress" incidents assigned to the group "Service Desk"

	Number	Opened	Short description	Caller	Priority	State	Category	Assignment group	Assigned to	Updated	Updated by
	INC0000055	2024-01-25 04:47:23	SAP Sales app is not accessible	Carol Coughlin	1 - Critical	In Progress		Service Desk	Beth Anglin	2024-02-07 23:08:31	admin
	INC0000029	2023-11-15 00:00:44	I can't get my weather report	Charlie Whitherspoon	5 - Planning	In Progress	Inquiry / Help	Service Desk	Don Goodliffe	2024-02-14 19:50:57	admin
	INC0010002	2024-08-11 16:41:32	Email Change Request - Urgently Needs to be Changed	Alene Raback	3 - Moderate	New	Software	Service Desk	(empty)	2024-08-11 17:04:07	admin
	INC0000037	2023-11-17 00:34:56	Request for a new service	Sam Sorokin	3 - Moderate	In Progress	Inquiry / Help	Service Desk	Howard Johnson	2024-02-14 19:51:40	admin

- Now we can see all the incidents that are currently “New” or “In Progress”.

Now let's resolve this ticket by becoming a service desk worker. We'll pick Beth Anglin.

The screenshot shows the ServiceNow 'Incidents' list with columns: Short description, Caller, Priority, State, Category, Assignment group, and Assigned to. A user menu is open on the right, showing options like Profile, Preferences, Impersonate user (highlighted with a red circle), Elevate role, Printer friendly version, and Log out. A red arrow points from the 'Impersonate user' option in the menu to the 'Impersonate user' dialog box. The dialog box has a search bar with 'Beth Anglin' entered, a list of results showing 'Beth Anglin' with a profile picture and email 'beth.anglin', and a section for 'RECENT IMPERSONATIONS' showing 'Service Desk' with a profile picture and email 'svc.desk'. At the bottom of the dialog are 'Cancel' and 'Impersonate user' buttons.

The screenshot shows the ServiceNow dashboard for Beth Anglin. The dashboard has a header with 'Hello Beth!' and a sub-header 'You are on-call until Monday, Aug 12 07:00 AM as Secondary'. The main content area is divided into several sections: 'Overview' with four cards (Incidents assigned to you: 5, Incident SLAs: 1, Unassigned Incidents: 3, Catalog tasks assigned to you: No data available), 'Upcoming' with a section for '1 Incident with breached SLA', 'Quick links' with 'No quick links yet', and 'Recently Viewed' with 'No history yet'. A red arrow points to the 'P3 unassigned incidents' section, which shows a list of incidents. The first incident is 'Email Change Request - Urgently Needs to be Changed' with a priority of '3 - Moderate' and a status of 'New'. The second incident is 'Can't access SFA software' with a priority of '3 - Moderate' and a status of 'New'.

- Here we can see the Incident unassigned on Beth's dashboard

Home INCO010002 x +

Email Change Request - Urgently Needs to be Changed

Priority: 3 - Moderate State: New 2024-08-11 16:41...

Overview Details Related records

Impact 3 - Low

Affected CIs: 0

Impacted Services/CIs: 0

Assets: 0

Affected CIs 0

Last refreshed just now

☐ Configuration Item ☐ Class ☐ Support group ☐ Owned by

Compose

Comments Work notes (Private)

Type your Comments here

Everyone can see this comment

Post Comments

Activity

System Administrator

Additional comments • 2024-08-11 16:58:58

Hi Alena, We've logged this incident up in our system. We will work on resolving your issue as fast as possible.

System Administrator

Work notes • 2024-08-11 16:58:58

Keep record of email changes incase for future incidents. Old email was Alena-Rabeck@WhackyMail.com.

System Administrator

Field changes • 2024-08-11 16:58:58

Record Information

Last updated by System Administrator 2024-08-11 17:04:07

Origin

Caller

Alene Rabeck

Sales

Richmond • 10:24 am America/Los_Angeles

Contact

Response SLA 21 min 3 min

Time to respond --

Resolution SLA 23 20hr

Time to resolve --

Assigned to

This Incident has not been assigned yet

- Here we can see all the information regarding the incident.

Home INCO010002 x +

Email Change Request - Urgently Needs to be Changed

Priority: 3 - Moderate State: In Progress 2024-08-11 16:41...

Overview Details Related records

Impact 3 - Low

Affected CIs: 0

Impacted Services/CIs: 0

Assets: 0

Affected CIs 0

Last refreshed just now

☐ Configuration Item ☐ Class ☐ Support group ☐ Owned by

Compose

Comments Work notes (Private)

Type your Comments here

Everyone can see this comment

Post Comments

Activity

Beth Anglin

Field changes • 2024-08-11 17:28:38

Incident state: In Progress was New

Assigned to: Beth Anglin was Empty

System Administrator

Additional comments • 2024-08-11 16:58:58

Hi Alena, We've logged this incident up in our system. We will work on resolving your issue as fast as possible.

System Administrator

Work notes • 2024-08-11 16:58:58

Record Information

Last updated by Beth Anglin 2024-08-11 17:28:38

Origin

Caller

Alene Rabeck

Sales

Richmond • 10:28 am America/Los_Angeles

Contact

Response SLA Completed

Time to respond 29 Minutes

Resolution SLA 23 20hr

Time to resolve --

Assigned to

Beth Anglin

Reassign

- The incident is now assigned to Beth.

Compose



Comments

Work notes (Private)

Type your Comments here

Everyone can see this comment

Post Comments

Activity



Beth Anglin

Field changes • 2024-08-11 17:32:17



Resolution code Solution provided was ~~Empty~~

Incident state Resolved was ~~In Progress~~

Resolution notes Email has been updated was ~~Empty~~



Beth Anglin

Field changes • 2024-08-11 17:28:38

Incident state In Progress was ~~New~~

Assigned to Beth Anglin was ~~Empty~~

Activities: 5



Beth Anglin

Field changes • 2024-08-11 17:32:17



Incident state Resolved was In Progress
Resolution code Solution provided
Resolution notes Email has been updated



Beth Anglin

Field changes • 2024-08-11 17:28:38

Assigned to Beth Anglin
Incident state In Progress was New



System Administrator

Additional comments • 2024-08-11 16:58:58

Hi Alena,
We've logged this incident up in our system. We will work on resolving your issue as fast as possible.



System Administrator

Work notes • 2024-08-11 16:58:58

Keep record of email changes incase for future incidents. Old email was Alena-Rabeck@WhackyMail.com.



System Administrator

Field changes • 2024-08-11 16:58:58

Impact 3 - Low
Incident state New
Opened by System Administrator
Priority 3 - Moderate

- The incident is now resolved.

Requests

As ServiceNow strongly follows the ITIL framework, Requests are also a section in itself. Requests can be for password resets, software installations, hardware requests and/or more. It depends on what the company has. Most of these requests are often self-service to save time from employees to focus energy on more important tasks.

The top screenshot displays the 'Requested Items View: Self Service' table. The table has columns for Number, Catalog, Item, Approval, Quantity, and Stage. The data rows show various requests, including 'Standard Laptop' and 'Samsung Galaxy S7'.

Number	Catalog	Item	Approval	Quantity	Stage
RITM00000005	(empty)	Standard Laptop	Requested	1	1
RITM00000004	(empty)	Standard Laptop	Requested	1	1
RITM00000003	(empty)	Standard Laptop	Requested	1	1
RITM00000002	(empty)	Samsung Galaxy S7	Requested	1	1
RITM00000001	(empty)	Apple iPad 3	Approved	1	1

The bottom screenshot shows the details for a specific request (RITM00000005). The fields include Number (RITM00000005), Due date, Approval (Requested), Quantity (1), and Stage (Dept. Head Approval). The description field contains the following text:

x1 Carbon
The x1 Carbon is Lenovo's lightest ThinkPad yet. It provides a QHD display that fights glare and weighs less than three pounds. Ideal for most computing tasks, and highly mobile.
Technical Specs:
• Intel core i5 processor
• 512GB solid state drive (SSD)
• Backlit keyboard

- Here we have gone and selected a request. From here we can identify what was requested, give a deadline and resolve it if the request has been completed.
- This is a great way to keep details on the procurements of the company.

Knowledge Base

There's also a knowledge base, which is a great way to access a library of information to help resolve incidents. Depending on what permissions you may have in your company, you can also create your own for others to reference from.

The screenshot displays the 'Knowledge Homepage' in ServiceNow. It features a search bar at the top, a list of knowledge bases (IT and Knowledge), and sections for Featured Content, Most Useful, and Most Viewed.

Knowledge Bases

Knowledge Base	Number of Articles
IT	32
Knowledge	1

Featured Content

- Email Interruption Tonight at 11:00 PM Eastern
- Sales Force Automation is DOWN

Most Useful

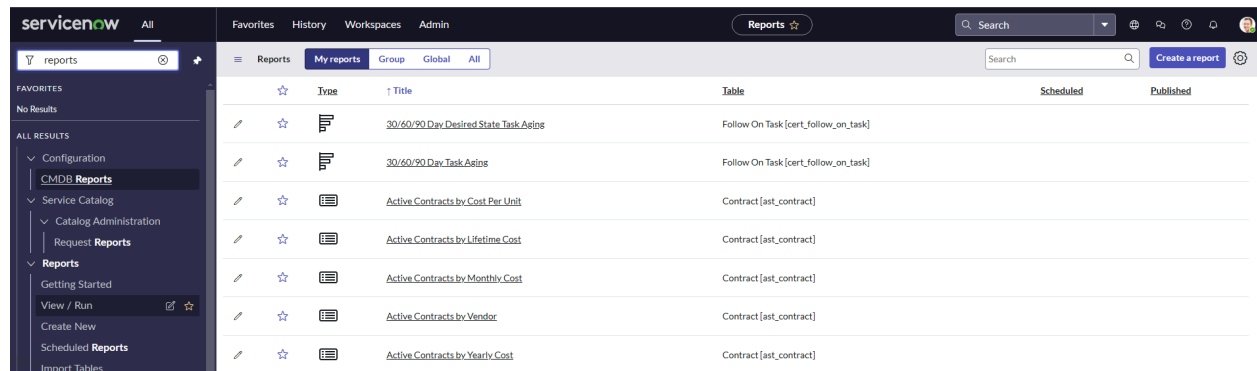
No articles to display

Most Viewed

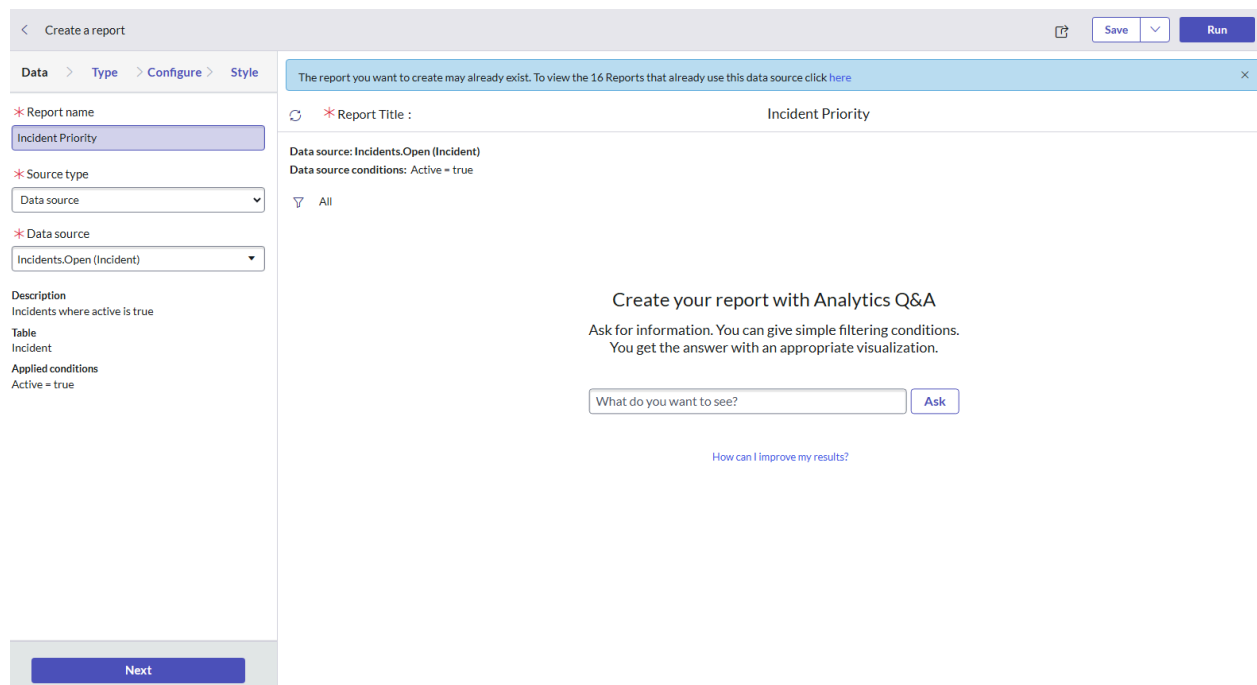
- What are phishing scams and how can I avoid them?
- Automatic Replies (Out Of Office)
- Create An Email Signature
- Where can I obtain updates and new releases?
- How do I quit an application that isn't responding?

Basic Reporting

On ServiceNow, you can also produce reports. Here we can create a simple report.



- This is what you'll see. You can create a report on the top right button



- Here you can fill out a report.
- I've set out a report name called "Incident Priority"
- Source type: Data source
- Data Source: Incidents.Open (Incidents)
- We can go to "next" or select the different tables at the top left.

Create a report

Incident Priority

Filter the visualizations

Bars

Pies and Donuts

Time series

Back Next

Report Title : Incident Priority

Type a question about your data

What do you want to see? Ask How can I improve my results?

To modify the current report, use the left panel or Edit Condition.

Data source: Incidents.Open (Incident)

Data source conditions: Active = true

All

Number	Opened	Short description	Caller	Priority	State	Category	Assignment group	Assigned to	Updated	Updated by
INC0000053	2024-01-24 20:48:46	The SAP HR application is not accessible	Margaret Grey	1 - Critical	In Progress	Inquiry / Help	Software	Beth Anglin	2024-02-14 19:42:25	admin
INC0000047	2024-01-24 20:53:18	Issue with email	Joe Employee	3 - Moderate	In Progress	Inquiry / Help	Software	Beth Anglin	2024-02-14 19:51:52	admin
INC0000051	2024-01-24 20:48:32	Manager can't access SAP Controlling application	Joe Employee	1 - Critical	In Progress	Software	Software	Don Goodliffe	2024-02-14 19:40:45	admin
INC0000046	2024-01-24 22:04:15	Can't access SFA software	Bud Richman	3 - Moderate	New	Software	Software	(empty)	2024-01-23 22:37:27	glide.maint
INC0000052	2024-01-24 20:48:40	SAP Financial Accounting application appears to be down	Bud Richman	1 - Critical	In Progress	Software	Software	Fred Luddy	2024-02-07 21:50:24	system
INC0000015	2023-10-31 23:38:46	I can't launch my VPN client since the last software update	Fred Luddy	1 - Critical	In Progress	Software	Software	Don Goodliffe	2024-02-14 19:50:33	admin
	2023-11-	Request for a new		2 -	In	Inquiry /		Edward	2024-02-	

- Here we can select the type of data visual representation we'd like.
- Select a bar chart then click "next"

Create a report

Incident Priority

Filter the visualizations

Bars

Pies and Donuts

Time series

Back Next

Report Title : Incident Priority

Type a question about your data

What do you want to see? Ask How can I improve my results?

To modify the current report, use the left panel or Edit Condition.

Data source: Incidents.Open (Incident)

Data source conditions: Active = true

All

Incident Priority

Incident Count

45

40

35

30

25

20

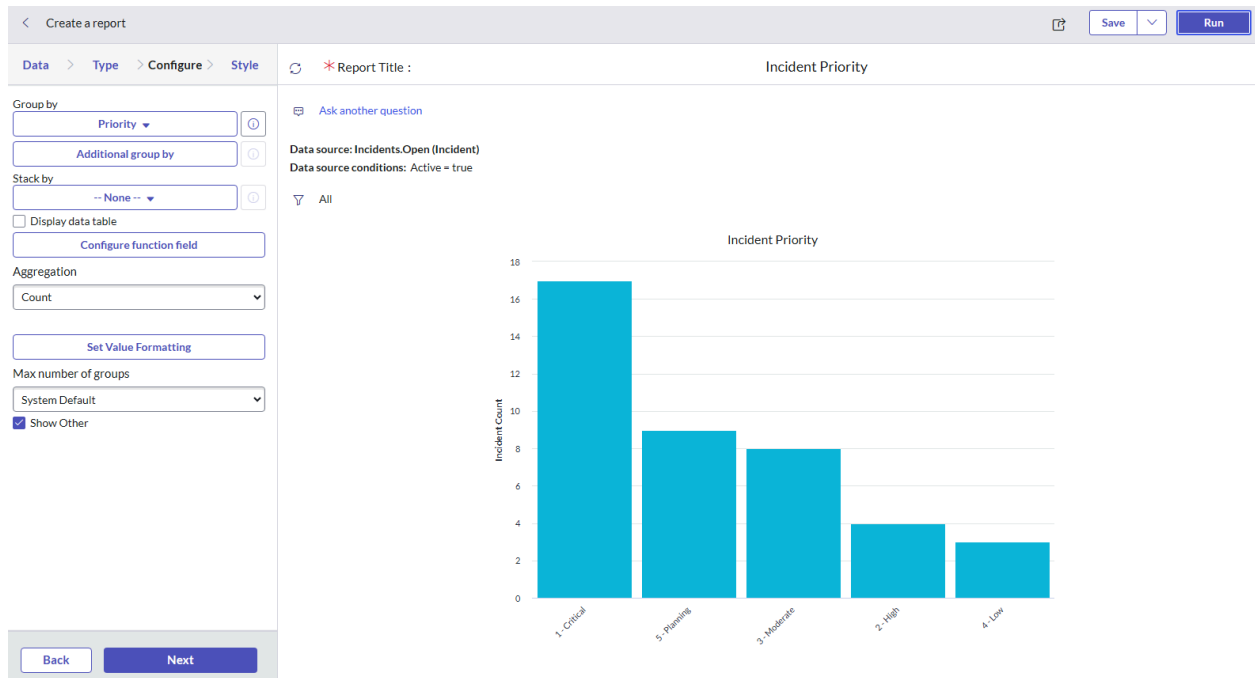
15

10

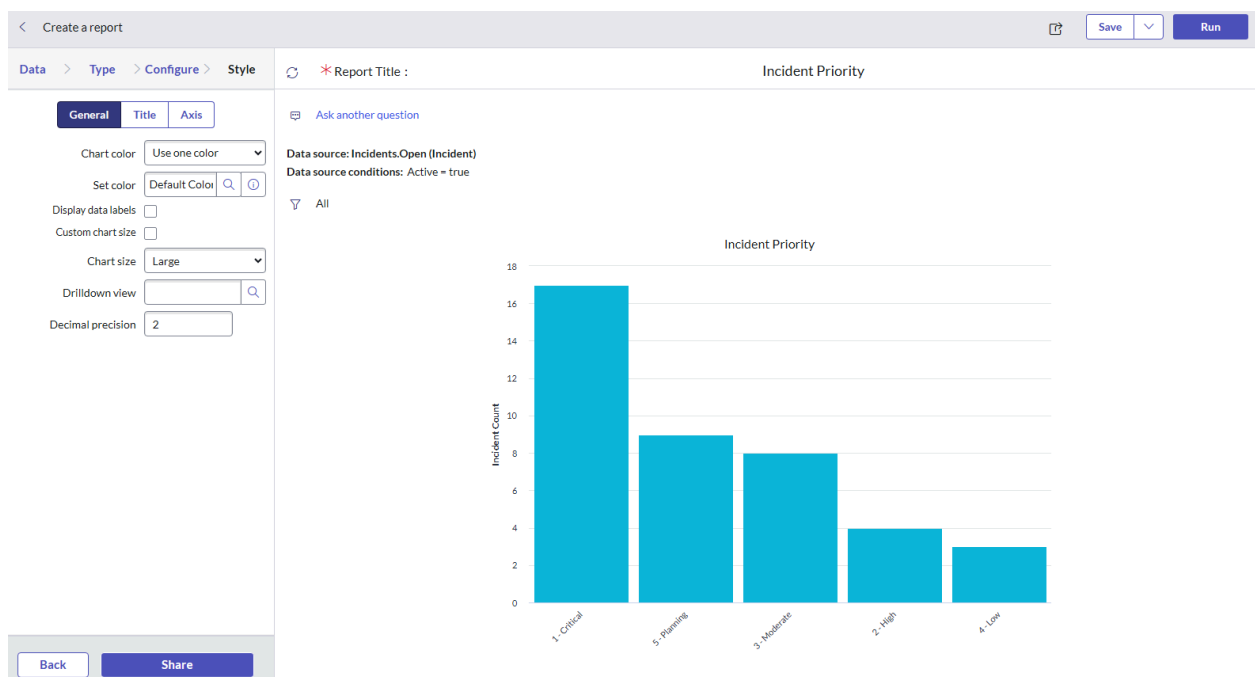
5

0

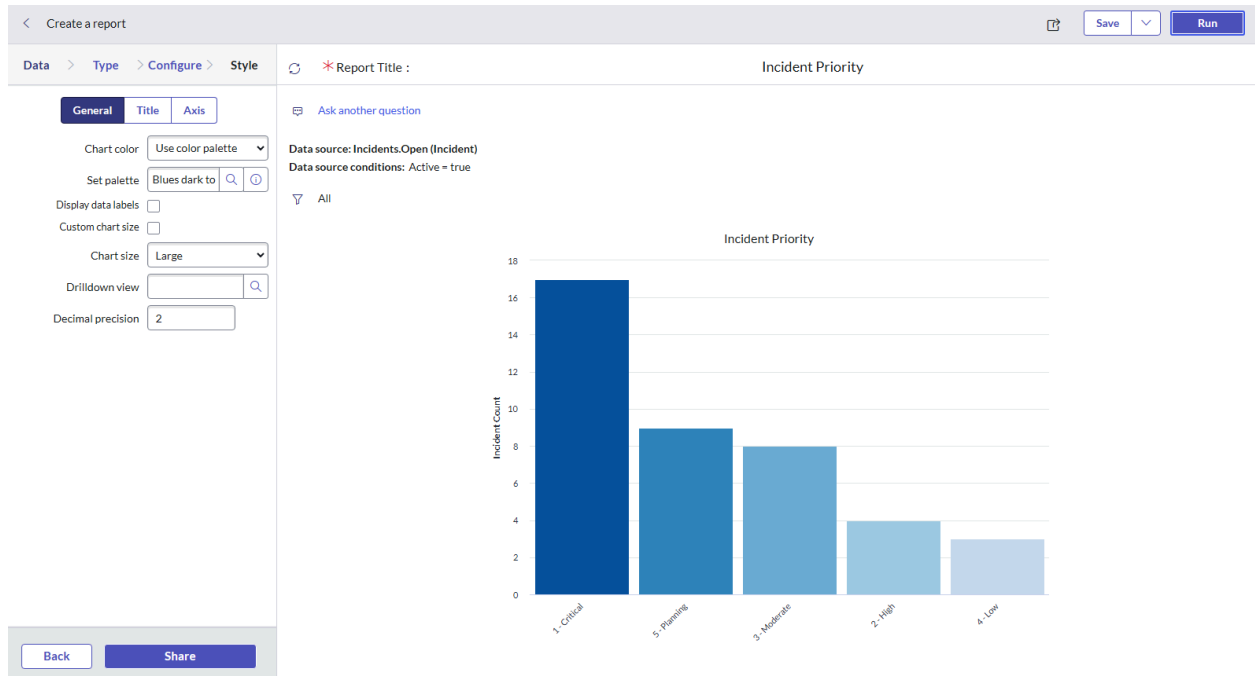
- Now we have a bar chart. Only one bar for now until we change the settings. We can see the changes by pressing run.



- It's now ordered by priority and not all joined as one data
- Click on "next"



- Here you can change the style of the data
- We'll change the colour to set the data apart



- Now the bar chart is more visually understanding.



- Now the report can be shared.

Wrapping Up

We've covered quite a bit of ground in this guide, haven't we? Our aim was to give you a thorough look at making the most of ServiceNow for IT Support. We've delved into the key areas: Incident Management, Request Fulfilment, Knowledge Management, and Basic Reporting.

1. We kicked things off with Incident Management? Explored how to log, prioritise, and categorise incidents, and shared some top tips for keeping users in the loop. It's all about sorting issues quickly and accurately, cutting down on downtime, and delivering a better service overall.
2. Then we moved on to Request Fulfilment. Here, we looked at how to handle various service requests.
3. Our Knowledge Base section highlighted why it's so valuable to have a well-maintained information library at your fingertips. It's a real game-changer for IT Support staff when it comes to problem-solving.
4. Lastly, we tackled Basic Reporting. We showed you how to create and tailor reports - a crucial skill for keeping tabs on performance and spotting areas where you could do even better.

All in all, I hope this guide helps you get to grips with ServiceNow.