Ticketing Systems — Complete End-User Guide

(ServiceNow & Jira Service Management concepts and workflows — for requesters, approvers, and agents)

> This handbook explains **how to use our IT ticketing portals correctly** so issues are resolved fast and clean. It's tool-agnostic (applies to ServiceNow *and* Jira Service Management) and uses neutral field names you'll see in both systems. Admin-only items are labeled *(Admin)*.

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0) What this covers

- What a "ticket" is and when to open one vs chat/email
- Incident vs Request vs Problem vs Change (and when to use each)
- How to file a **great** ticket (title, description, attachments, logs)
- Priority, Impact/Urgency, SLAs, and status meanings
- Using the **portal**, **email-to-ticket**, and **virtual agent**
- Approvals (for managers/owners) and change control basics
- Working a ticket: linking, watchers/request participants, comments, work notes
- Major Incidents, communications, and clean closure
- Paste-ready **templates** for common scenarios
- Escalation etiquette and what info IT needs

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1) What is a ticket?

A **ticket** is a tracked record of work. It has a unique number (e.g., `INC0001234` or `REQ-2356`) and fields like **Summary/Short Description**, **Description**, **Category**, **Priority**, **Assignment Group**, **Status**, **SLAs**, and **Attachments**. Every action is timestamped so anyone can see history.

Golden rules

1. **One issue per ticket.** Don't mix unrelated problems.
2. **Be specific.** Clear titles, concrete steps, exact errors.
3. **Attach evidence.** Screenshots, logs, filenames, timestamps.
4. **Keep it in the ticket.** Use comments instead of side emails so the whole story is visible.
5. **Close the loop.** Confirm resolution or re-open with new info.

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2) Choose the right type

2.1 Incident (something is broken)

Use **Incident** when a service used to work and now **doesn't** (outage, error, degraded performance, data mismatch).

Examples: "VPN won't connect", "Outlook stuck on 'Trying to connect…'", "Printer offline", "Report 500 error".

2.2 Service Request (you want something)

Use **Request** when you need **access, hardware, software, information, or a routine change** that follows a standard path.

Examples: new laptop, software install, distribution list change, new SharePoint site, add user to group, license request.

2.3 Problem (root cause analysis)

Use **Problem** to investigate **recurring or major issues**. Usually created by IT after multiple related Incidents. It seeks the **root cause** and a permanent fix.

2.4 Change (planned change to production)

Use **Change** for **planned production changes** (patches, config changes, deployments). Includes **Standard** (pre-approved template), **Normal** (risk assessed, CAB approval), and **Emergency** (break-fix under time pressure). See §8.

> If unsure between Incident vs Request, ask: “Did this used to work and now it doesn’t?” → **Incident**. Otherwise → **Request**.

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3) Filing a great ticket (portal/email/chat)

3.1 Before you open

- **Check service health** or announcements (if available).
- **Search knowledge** for a self-service article.
- **Gather evidence**: exact error text, screenshots, timestamps, affected users/locations, you tried what/when.

3.2 Title (Short Description)

Make it **specific and scannable**:

- Bad: “Email issue”
- Good: “Outlook on Windows: constant password prompts after password change (since 9:40 AM ET)”

3.3 Description (make it reproducible)

Include:

- **When it started** (absolute time/date & timezone)
- **Impact** (you only? team? department? % of users)
- **Environment** (device/OS; app & version; network: office/home/VPN)
- **Exact error text** (copy/paste) and **screenshots**

- **Steps tried** (reboot? relogin? different network?)
- **Business impact** (blocked from sending invoices, deadline risk, compliance impact)
- **Contact window** (times you're available for a call or remote session)

3.4 Key fields to fill

- **Category / Subcategory** (e.g., Email → Outlook; Access → Group membership)
- **Service / CI (Configuration Item)** if visible (e.g., "Corporate VPN", "M365 Exchange Online")
- **Location** (office name/home/remote)
- **Affected users** (count and representative names)
- **Impact** and **Urgency** (drives Priority)
- **Attachments** (screenshots, logs, CSVs)
- **Tags/Labels** (Jira) for easy searching
- **Request participants/Watchers** (stakeholders who need visibility)

3.5 Attachments & data hygiene

- Don't attach **passwords, secrets, or PII** unless masked/redacted.
- Prefer **plain text** logs (.txt) and **short videos** for repro (30–60s).
- If size is large, compress to ZIP.

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4) Priority, Impact/Urgency, and SLAs

4.1 Impact x Urgency = Priority

- **Impact**: scope/scale (Single user → Department → Org-wide).

- **Urgency**: time sensitivity (Workaround exists? Deadline? Regulatory risk?).
- The system maps these to **Priority P1–P5** (or High/Medium/Low). Don't over-inflate—mis-prioritization slows everyone.

Example matrix

- P1 (Critical): Org-wide outage, revenue stop, security incident.
- P2 (High): Multiple teams blocked; no workaround.
- P3 (Medium): Single team or key user; workaround exists.
- P4 (Low): Minor impact/usability issue.
- P5 (Planned/Informational): No breakage; tracking only.

4.2 SLAs (Service Level Agreements)

Common metrics:

- **First Response**: time to first human response.
- **Resolution**: time to restore service/complete request.
- **On Hold / Awaiting Customer** pauses clocks until you reply.
  Check the **SLA panel** in the ticket to see timers and pauses.

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5) Statuses & what they mean (both platforms use similar states)

- **New**: created, not yet triaged.
- **In Progress / Assigned**: owner working the ticket.
- **Awaiting Customer**: pending your response; **SLA timer paused**.
- **Awaiting Vendor/3rd Party**: waiting on outside group.

- **Resolved**: a solution/workaround provided; please **test and confirm**.
- **Closed**: verified or auto-closed after a re-open window (e.g., 3–7 days).
- **Cancelled**: no longer needed/duplicate.

Your part: respond within the re-open window if not fixed. After **Closed**, open a fresh ticket and link the old number.

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6) Communicating in tickets (public vs internal)

- **Public Comments / Customer Comments**: visible to you and watchers/participants; use for updates, questions, and results.
- **Work Notes / Internal Comments**: **agents only**; not visible to requesters.
- **@Mentions** (Jira) or **Additional comments to** (ServiceNow) to loop people in.
- Keep updates **concise and timestamped** ("11:10 AM ET: tested on Ethernet + VPN; same error 0xCAA90018").
- When resolved, include **what changed** and **how to avoid recurrence**.

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7) Using the system: three entry points

7.1 Portal (preferred)

- Navigate to the **IT portal**; choose **Report an Issue (Incident)** or **Request Something (Service Request)**.
- Use **Catalog Items** for common asks (laptop, software, access) — these ask the right questions and route to the right team automatically.

7.2 Email-to-ticket

- Email the IT address (e.g., `it@company`) with a **clear subject** and body including key details from §3.
- **Inline images** sometimes strip; attach files explicitly.
- Keep replies **in the thread** to avoid splinter tickets.

7.3 Virtual Agent / Chat

- Start with a keyword (“VPN”, “Outlook”, “printer”).
- The VA may give a solution or open a pre-filled ticket; complete any missing fields.

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8) Change Management (for planned production work)

8.1 Change types

- **Standard Change**: low-risk, pre-approved via template.
- **Normal Change**: assessed for **risk/impact**, scheduled, **CAB approval** if required.
- **Emergency Change**: urgent break-fix; post-implementation review mandatory.

8.2 Required content (Normal/Emergency)

- **Business justification** and user impact
- **Implementation plan** (step-by-step)
- **Validation plan** (how you’ll confirm success)
- **Backout/rollback plan** (how to restore)
- **Risk assessment** (likelihood/severity; mitigations)
- **Affected services/CIs** and dependencies
- **Change window** (start/end in timezone), **blackout windows** respected

- **Approvals**: technical owner, service owner, CAB (as defined)

8.3 After the change

- **Close** with actual start/end, outcome, and links to any **Incidents/Problems** created.
- Update **knowledge** if user-facing behavior changed.

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9) Problem Management (when incidents repeat)

- Create/link a **Problem** when multiple Incidents share a pattern.
- Capture **root cause, contributing factors, corrective actions**, and **preventive actions**.
- Link **Known Error Articles** and **Workarounds** so Service Desk can resolve faster next time.

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10) Major Incident (MI) flow — quick overview

- Trigger when impact reaches **P1** (safety, revenue, or many users blocked).
- **MI Manager** coordinates: bridge call, comms, updates every X minutes.
- **Incident** stays open with **broadcast updates** (status page, portal banner).
- After restoration, do a **post-incident review**: timeline, cause(s), lessons learned, follow-up actions.

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11) Approvals — for managers/owners

- You'll receive an **approval** in the portal or by email.

- Approve/Reject with a **comment** (reason).
- Approvals may be **blocking** (work won't proceed until approved). Respond promptly to keep SLAs moving.

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12) Linking, duplicates, and relationships

- **Link duplicates** to a **primary** ticket to keep history consolidated.
- In Jira, use **Issue Links** (blocks, relates to, duplicates, caused by).
- In ServiceNow, use **Related Records** (child/parent, problem, change).
- Link **Incidents** ↔ **Problems** ↔ **Changes** so reports show end-to-end flow.

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13) Clean closure & re-opening

- **Agents** move to **Resolved** with a clear **Resolution code** and **Resolution notes** (what fixed it).
- **Requesters**: verify fix; click **Accept/Close** or comment "Issue persists" to **re-open** within the window.
- After **Closed**, open a new ticket and reference the old one.

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14) Templates (paste into Description)

14.1 Incident — Outage / Not Working

Title: `<App/Service> – <symptom> since <time> <TZ>`
Description:

- When started: <10:22 AM ET, today>
- Impact: <me / team / department / org>; count: <N users>
- Environment: <Windows 11 build / macOS 14.x>, network <office/home/VPN>
- Exact error: <copy full text / code>
- Steps to repro: 1)… 2)… 3)…
- Tried already: <restart app, reboot, different network, web vs desktop>
- Business impact: <deadline, customer impact, revenue risk>
- Attachments: <screenshots/logs>

14.2 Service Request — Access to Application/Group

Title: Access request – <App/Group Name> for <User/Email>
Description:

- User(s): <name, email, employee ID>
- Access level/role: <read, write, admin>
- Environment: <prod/test/dev>
- Justification: <business reason>
- Manager approval: <name>
- Start/end date (if temporary): <dates>

14.3 Service Request — Software Install

Title: `Install <Software Name> <version> on <Device/OS>`
Description:

- Device: `<model, asset tag, OS version>`
- License type/owner: `<named user / device / team>`
- Source: `<approved catalog / vendor>`
- Dependencies/add-ins: `<if any>`
- When needed by: `<date>`

14.4 Hardware — Laptop/Peripheral Issue

Title: `<Device> – <symptom> (since <time>)`
Description:

- Device & asset tag: `<model / tag>`
- Power/LEDs/fans: `<observed>`
- Peripherals connected: `<dock, monitors, USB>`
- Error codes/lights: `<text/pattern>`
- Tried: `<different cable/port, other outlet, reset>`

14.5 Change — Normal

Title: `[CHANGE] <Service/CI>: <summary>`
Description:

- Business justification: `<why>`
- Implementation steps: `1)… 2)… 3)…`
- Validation steps: `1)… 2)…`

- Backout plan: `1) …`
- Risk assessment: `<low/med/high + mitigations>`
- Window: `<start–end, timezone>`
- Affected CIs/Services: `<list>`
- Approvals required: `<roles/names>`

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15) Escalation etiquette (fastest path to help)

- Be **polite and factual**; assume shared goals.
- Add **new evidence** when escalating (logs, timestamps), not just “any update?”.
- If business impact increased (e.g., deadline pulled forward), **update Impact/Urgency** and explain.
- For P1, use the **major incident bridge** if provided; otherwise note the **best callback number** and availability window.

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16) For agents & power users (optional but useful)

16.1 Triage checklist

- Is it **Incident** or **Request**? (convert if needed)
- Correct **Category/Subcategory**, **Service/CI**, **Assignment Group**
- Set **Impact** & **Urgency** honestly; check for **duplicates**
- Add **work notes** every meaningful step; keep **public** comments user-friendly
- Link to **Problem** if recurring; create **Known Error** or **KB** if workaround exists

- For vendor cases, set **Awaiting Vendor** and record case #

16.2 Good comments

- Replace jargon with outcomes (“Reset mailbox index; search fixed”).
- Time-stamp your actions and results.
- Offer next-step choices (“Can we remote in between 2–3 PM ET today?”).

16.3 Reporting hygiene

- Always close with a **Resolution code** and clear **Resolution notes**.
- Keep fields clean for metrics: **Root cause**, **CI**, **Related problem/change**, **SLA met?**.

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17) FAQs (quick answers)

Q: Can I open one ticket for multiple unrelated asks?
A: No. One issue per ticket keeps ownership, SLAs, and history tidy.

Q: When do I mark “High” urgency?
A: When real-time operations are blocked or deadlines are at risk and no workaround exists.

Q: The portal form asks things I don’t know.
A: Fill what you can, attach evidence, and say what you don’t know; the form routes to the right team.

Q: The ticket auto-closed but my issue persists.
A: Open a new ticket, reference the old number, state “persisting issue after closure,” and include fresh evidence.

Q: Who can see my ticket?
A: You, assignees, and any **watchers/request participants** you add; internal **work notes** are staff-only.

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18) What IT needs from you (at creation time)

- Clear **title** and **description** (see §3)
- **When it started** (absolute date/time + timezone)
- **Scope** (single user/team/department/org)
- **Environment** (device/OS, app version, network)
- **Exact error text** + **screenshots/logs**
- **Business impact** (what is blocked)
- **Contact window** for live troubleshooting

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19) Paste-able quick responses (no links)

Ask for details

> Thanks for the report — to speed this up, can you add when it started (date/time & timezone), exact error text, steps to reproduce, and whether it also fails on the web or another network?

Awaiting customer reminder

> We're waiting on your reply to continue. The SLA timer is paused while we wait. If we don't hear back by `<date>`, we'll resolve the ticket; you can re-open within `<X days>`.

Resolution note example (clear & final)

> Root cause: expired credential cached in Outlook profile. Fix: removed stale token, rebuilt profile; verified send/receive and search. Prevent: sign out/in after password changes. Monitoring for 24h.

Change window confirmation

> Your change is scheduled `<start–end TZ>`. Expected impact: `<none / brief outage>`. Rollback plan in place. We'll post start/finish updates here.

Major incident update

> We’re investigating a widespread issue impacting `<service>`. Next update by `<time TZ>`. Workaround: `<steps>`. Please follow this ticket for status.

Final Notes

- The **right ticket type**, **good evidence**, and **clear updates** solve most requests quickly.
- Keep all communication **inside the ticket**; avoid side channels.
- Use the **templates** here to standardize requests and speed up triage.
- When in doubt, **start with Incident vs Request** and provide impact/time. The IT team will convert or route as needed.