Incident Management

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Process Steps

Data Flow Overview

- ServiceNow = Add Logs based on Incidents here
- Smartsheet Intake Sheet = Logs are appended from ServiceNow
- Three Templates: Incident Template, SLA Compliance Template, Service Request Fulfillment Template, Project Solution
- Separate Three Rollups
    - Incident Rollup
    - SLA Compliance Template
    - Service Request Fulfillment
    - Project
- Feedback Tracker
- Metrics (Try to do without metrics)
- Reports, Dynamic Reports, Dynamic Views
- Dashboards for each

Essential Columns

ServiceNow

1. Incident Number = Auto Number
2. Reported Date = Date/Time
3. Reported By = Email (Pull from User's Table)
4. Name = Text/Number (Pull from User's Table)
5. Department = Text/Number (Pull from Department's Table)
6. Company
7. City = Text/Number (Pull from Location's Table)

    Create a subsection for this one

    a. Short Description = Text/Number
    b. Category = Dropdown (Hardware, Software, Network, Access, Project, Security, Cloud Service, Other)
    c. Subcategory = More Specific to which it has affected (Eg: Laptop, VPN, Email, Application Login, Server, Wi-Fi, Mobile App, Cloud Storage, Database, Firewall, USB Device, Other)

Smartsheet

Incident Template (Meant for Software, Security, Access, Cloud Service)

1. Incident Number, Reported Date, Client Name, City, Category, Subcategory -> Should be prefilled from Intake Sheet through Control Centre
2. Detailed Description
3. Configuration item: Affected Asset or service
4. Impact: Scope (single user, department wide)
5. Urgency: How quickly it needs resolution (Critical, Very High, High, Medium, Very Low, Low)
6. Priority: Auto calculated based on impact and urgency
7. Assigned Group: Team responsible for resolution
8. Assigned To: Specific technician or analyst
9. Status: New, In Progress, On Hold, Resolved, Closed
10. Resolution Code: Reason for resolution (Solved, Workaround Applied, User Error, Configuration Change, Hardware Replaced, Software Patch Applied, Cancelled, Duplicate, Not Reproducible)
11. Resolution Notes
12. Resolved Date/Time
13. Closure Code: Final status (e.g., Resolved, Cancelled, Duplicate)
14. Related Incidents: Linked incidents
15. Root Cause
16. Attachments: Screenshots, logs, etc.
17. Follow Up Required: Checkbox -> In rollup a form should be triggered which is prefilled

SLA Compliance Template

1. Incident Number, Reported Date, Client Name, City, Category, Subcategory -> Should be prefilled from Intake Sheet through Control Centre
2. SLA Type:
    a. Response SLA – Time to acknowledge or respond to the incident/request
    b. Resolution SLA – Time to fully resolve the issue
    c. Investigation SLA – Time to begin root cause analysis
    d. Escalation SLA – Time within which issue must be escalated
    e. Communication SLA – Time to update stakeholders or users
    f. Verification SLA – Time to confirm resolution with the user
    g. Closure SLA – Time to formally close the ticket after resolution

3. SLA Target Time
4. Actual Resolution Time
5. SLA Status: Breached, Met, In Progress
6. Assigned Team
7. Escalation Status Yes/No
8. Escalation Reasons

Service Request Fulfillment Template (Meant for Hardware, Network)

1. Incident Number, Reported Date, Client Name, City, Category, Subcategory -> Should be prefilled from Intake Sheet through Control Centre
2. Detailed Description
3. Configuration item: Affected Asset or service
4. Impact: Scope (single user, department wide)
5. Urgency: How quickly it needs resolution (Critical, Very High, High, Medium, Very Low, Low)
6. Priority: Auto calculated based on impact and urgency
7. Assigned Group: Team responsible for resolution
8. Assigned To: Specific technician or analyst
9. Status: New, In Progress, On Hold, Resolved, Closed
10. Resolution Code: Reason for resolution (Solved, Configuration Change, Hardware Replaced, Cancelled)
11. Resolved Date/Time
12. Closure Code: Final status (e.g., Resolved, Cancelled, Duplicate)
13. Attachments: Screenshots, logs, etc.

Project Solution

1. Incident Number, Reported Date, Client Name, City, Category, Subcategory -> Should be prefilled from Intake Sheet through Control Centre
2. Detailed Description
3. Solution Category: Dropdown
    a. Project Management – Issues related to project tracking, planning tools, timelines
    b. Business Process Automation – Workflow automation, RPA, approvals
    c. Service Delivery Optimization – Enhancing IT or business service efficiency
    d. Customer Experience Solutions – CRM, support portals, feedback systems

e. Data & Analytics – BI tools, dashboards, reporting issues
f. Digital Transformation – Cloud migration, modernization efforts
g. Compliance & Risk Management – Audit tools, policy enforcement
h. Collaboration Platforms – Microsoft Teams, Slack, SharePoint
i. Finance & Procurement Systems – ERP, invoicing, purchase requests
j. HR & Talent Solutions – Onboarding, HRMS, performance systems
k. Custom Applications – In-house developed tools or platforms
l. Integration Projects – API, middleware, system sync issues

4. Urgency: How quickly it needs resolution (Critical, Very High, High, Medium, Very Low, Low)
5. Priority: Auto calculated based on impact and urgency
6. Assigned Group: Team responsible for resolution
7. Assigned To: Specific technician or analyst
8. Status: New, In Progress, On Hold, Resolved, Closed
9. Resolution Code: Reason for resolution (Solved, Configuration Change, Hardware Replaced, Cancelled)
10. Resolved Date/Time
11. Closure Code: Final status (e.g., Resolved, Cancelled, Duplicate)
12. Attachments: Screenshots, logs, etc.

Feedback Tracker

1. Incident Number (linked to original ticket)
2. Feedback Rating (e.g., 1–5 stars or Excellent/Good/Fair/Poor)
3. Comments (optional text field)
4. Follow-up Required? (Yes/No)
5. Date Feedback Received
6. Assigned Team (for accountability)