How do I assign incidents to problems?

Article ID: KB0039469

Created: 2025-01-28 12:23:24 **Updated:** 2025-01-28 13:10:31

Author: {'link':

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There are three ways to assign incidents to a problem depending on your use case.

Incident form: Apply Knowledge Article to a new incidentIncident form: Manually add problem reference in the incident formProblem form: Link existing incidents via "Related incidents search"

Note: The third option usually is used during problem ticket creation.

Apply Knowledge Article to an incident

Within the incident form you may open the list of "Related search results" which proposes matching Knowledge Articles based on the incident short description. You may also refine the search terms used.

Note: You need to save the incident for a first time before you follow the steps below.

Enter or refine the short description of shown: Make "Related Search Results" visible required: refine the search terms used Click on preview, to open the Knowledge Article

Within the Knowledge Article preview, klick on "Apply to Incident".

This will add the links to the Knowledge Article itself but also the problem will be referenced under "Related Records", if the Knowledge Article is linked to a problem:

References:

Please also see the Knowledge Article "How can I link a problem with a Knowledge Article?".

Manually add reference to a problem in the incident form

If there is no matching knowledge article but you know the incident was caused by a particular problem, you may add the link to the problem directly in the incident form under tab "Related Records".

Link incidents via "Related incidents search"

The options above described the possibilities to create a reference from an incident to an existing problem. The other way round to create links from a problem to existing incidents is also supported and is described in this section.

To add related incidents to a problem, open the "Related incident search" in the problem form.

The list will be preset with a filter for the service offering given in the problem.

After the filter settings are adjusted to the current needs, the relevant incidents may be marked in the list.

Note:

Please remove the filter "Active=true" in order to find closed incidents as well.

The selected incidents may now be added to the problem by performing the action "Add to problem".

References:

You may also find a short video about this: Assign existing incidents to a problem