CLIENT ADMIN GUIDE

Version: San Diego
1/12/2023

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Guide Introduction

This guide introduces ServiceNow from a Client Administrator perspective. Included in this guide are topics on common administrator features along with steps and visuals for common administrator tasks performed in ServiceNow.

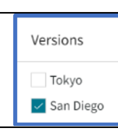
Pay attention to important messages, notes, and tips provided throughout the guide.

Initial Terms	
Terms	**Definitions**
Assignment Group	Frontline MS or Client Incident Queue
Assigned To	Analyst the incident is assigned to
Broadcast Message	Temporary knowledge base articles that are relevant for a week. If the information is relevant for more than a week a standard knowledge base article is created.
Incident	ServiceNow Ticket
Outage	A systemic issue affecting multiple users concerning slowness, service outage, or planned outage and maintenance.
QA Assessments	Leave feedback and performance ratings on incidents.
Resolve	Marking an incident as resolved does not close the incident in the system. Incidents can be re-opened while in a 'Resolve' state. If the requester does not call or email regarding the incident within 5 days after it is marked resolved, the incident automatically closes in the system. Incidents cannot be re-opened when they are in a 'Closed' state.
Special Handling Note	Critical, pop-up messages based off data fields in an incident window.
SLA	Service Level Agreement
System Scheduler	Use the System Scheduler application to create Schedule Templates for Holiday Schedules. These templates are selectable from the On-Call Scheduling application.
VIP Note	Contain important information about the requester

IMPORTANT:	ServiceNow searches based on **Starts With**. Use an asterisk * in front of search terms if no results are listed.
	Try saving if fields or buttons are missing or lists load without results.

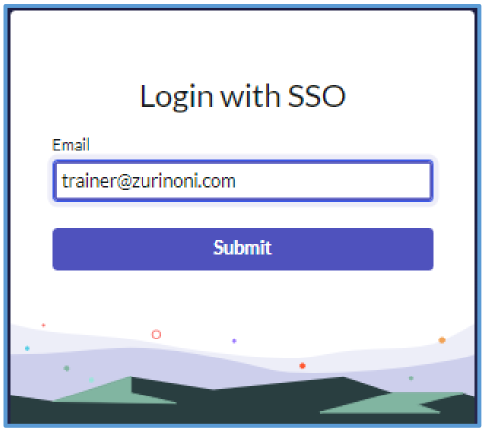
Additional ServiceNow Resource

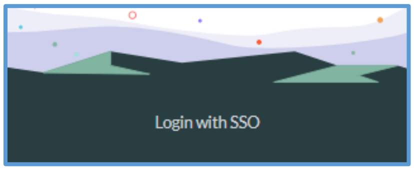
Navigate to https://docs.servicenow.com/ in a web browser for official ServiceNow documentation.

Note:	While navigating and reviewing documentation, confirm ServiceNow version is set to **San Diego** in navigation pane.	

Logging On With SSO

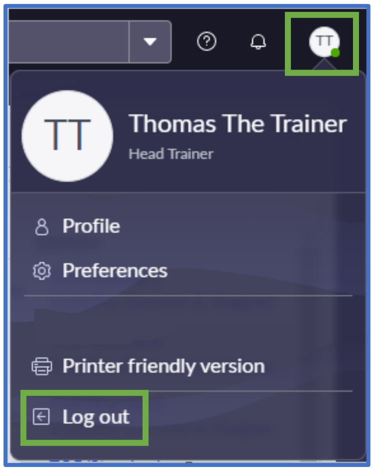
1. Open a web browser
2. Navigate to: https://intelliteach.service-now.com/login_locate_sso.do
3. Enter company email address in **Email** field
4. Click **Submit**



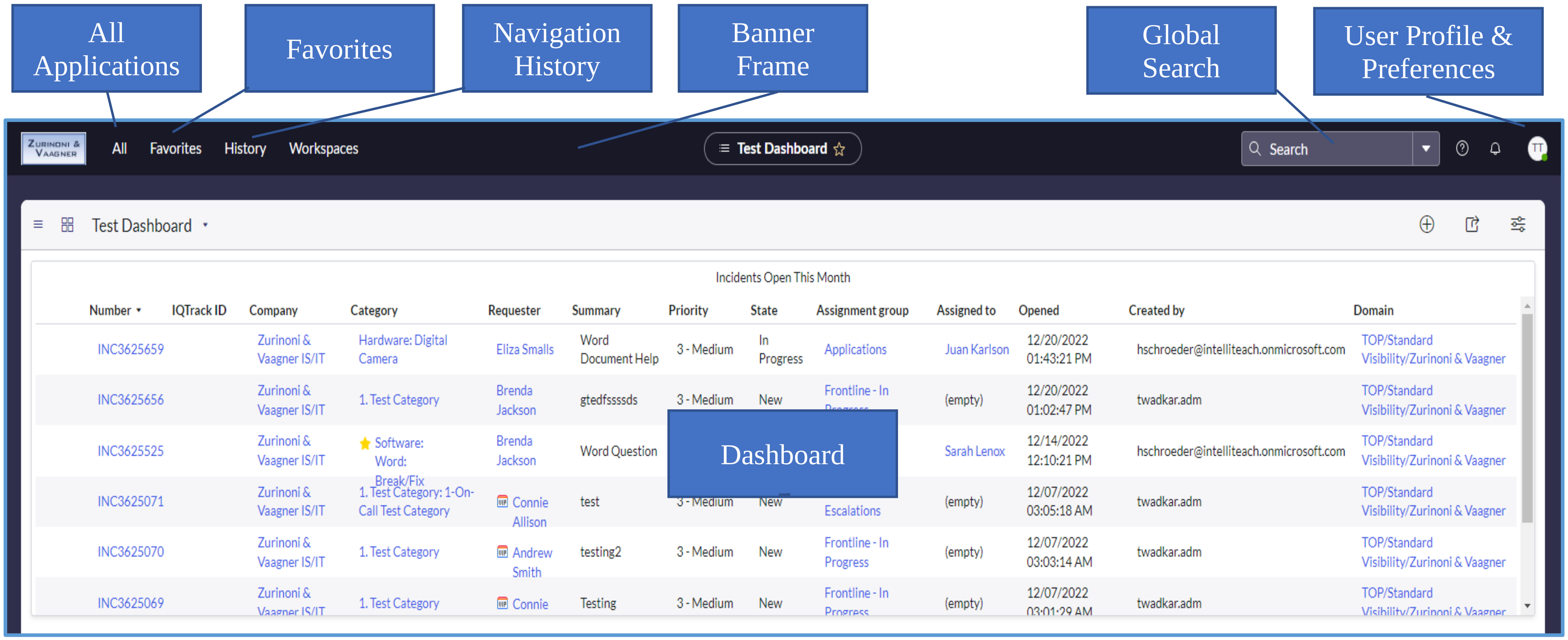
<table>
<tr><td rowspan="2">Notes:</td><td>If prompted to log on, use company email address and network password.</td></tr>
<tr><td>If prompted with Username and Password fields, click Login with SSO towards bottom.

</td></tr>
</table>

Log Out

1. Click **User Menu** drop down
2. Click **Log out**



ServiceNow Web Interface Diagram



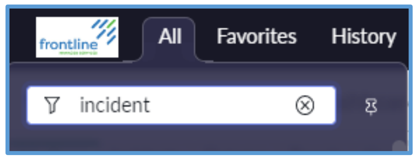
Note:	Click the **Pin All menu** button to pin the All, Favorites, or History tabs to left of the interface.

Favorites

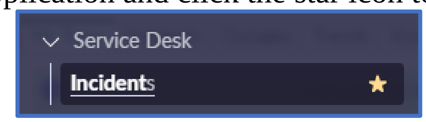
Applications found in the navigation pane can be favorited for quick access. In addition, favorites can be renamed and color-coded.

Add Favorites from Navigation Pane

1. Click the **All** tab
2. Locate the application in the navigation pane using the scroll bar or searching in the **Filter navigator** field



3. Hover the mouse over an application and click the star icon to the right



4. Click the **Favorites** tab to find favorited applications

It is recommended to favorite the following:

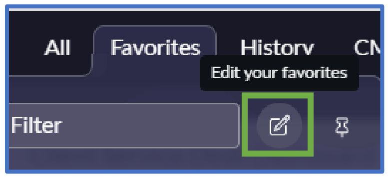
Section	Sub Section	Description
Incident	Incidents All	Displays a searchable list of all incidents (tickets)
	All QA Assessments	Quality control for internal use
	Create New	Creates a new incident (ticket)
	Assigned to me	Displays a list of incidents assigned to the logged in user
	Assigned to my groups	Displays a list of incidents assigned to group members
	My groups unassigned	Displays a list of incidents that are assigned to a group but not assigned to an analyst yet
Reports	View/Run	View or Run existing reports
	Create New	Create a new report
	Scheduled Reports	List of reports scheduled to be emailed
User Administration	Users	Manage information about users and add VIP notes
	Groups	Manage groups of users in ServiceNow
System Scheduler	Schedules	Create, modify, and view schedules
On-Call Scheduling	Create/Edit Schedule	Create and modify emergency on-call schedules

Note	Click **Hamburger** and select **Create Favorite** to favorite current page

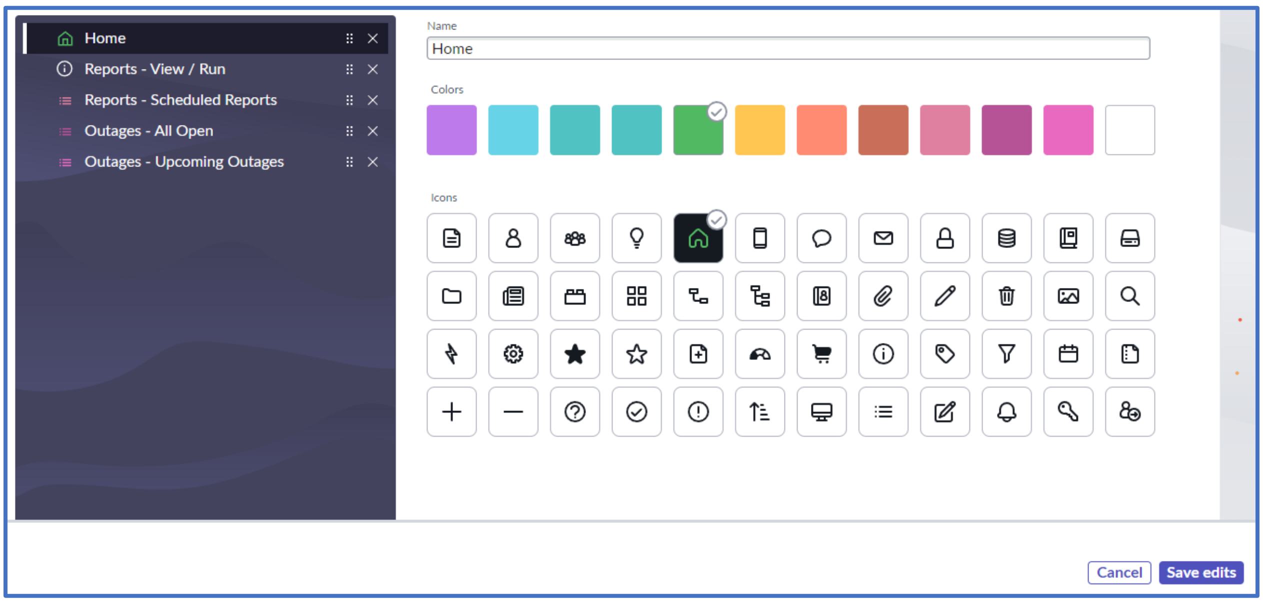
Customize and Re-order Favorites

Follow the steps below to rename and re-order favorites along with changing their icons and the color of icons.

1. Click the **Favorites** tab to find favorited applications
2. Click the **Edit your favorites** button



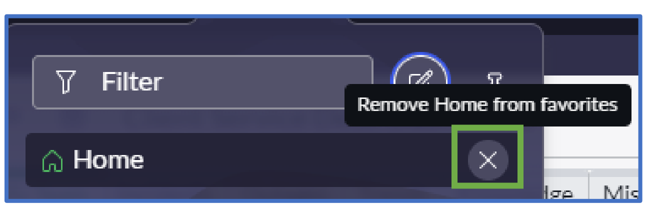
3. Drag & drop to re-order favorites
4. Make desired changes to names, colors, & icons



5. Click **Save edits**

Remove a Favorite

1. Hover over the favorite
2. Click **X** on the right

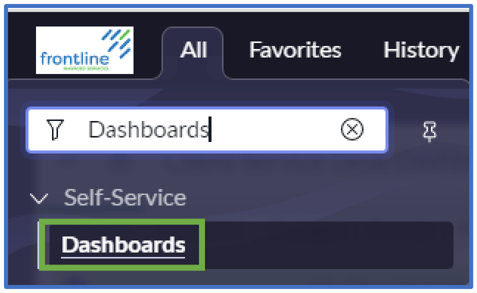


DASHBOARDS

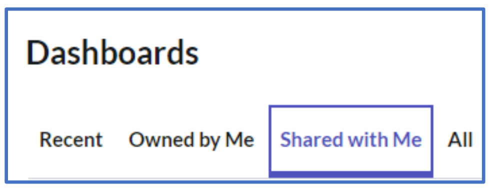
ServiceNow's Dashboard tools provide access to critical information that is revisited on a regular basis. Any variety of reports, widgets, or other resources can be added to help manage the Firm on a day to day (or minute to minute) basis.

FIND SHARED DASHBOARDS

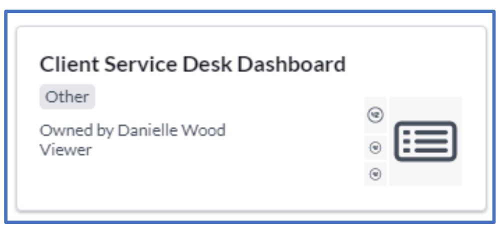
1. Click **All** tab
2. Inside of the **Filter Navigator**, search for the term **Dashboards**
3. Under the Self-Service heading, choose **Dashboards**



4. Select **Shared with Me** tab



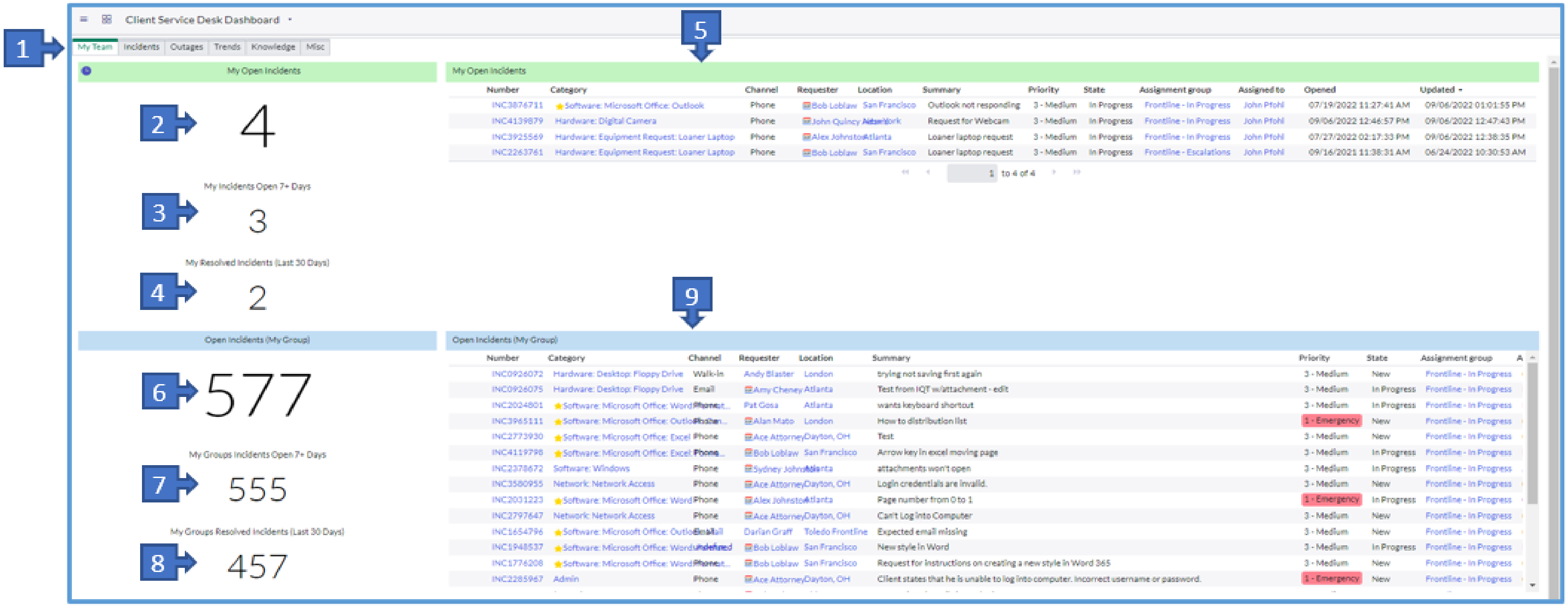
5. Select available Dashboard



Note	Clicking **Home** loads the most recently selected Dashboard.

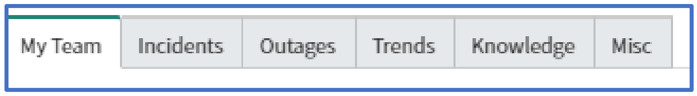
Client Service Desk Dashboard Diagram

This is the current image of the Client Service Desk dashboard. This dashboard is created by Frontline and is shared with clients by request. For fields that have a single value in it, clicking the value displays a list of that fields' current items. For example, clicking the number in "My Incidents Opened Today" opens a list of all the incidents that an analyst has opened today.



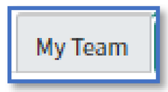
1	**Dashboard Pages**	Toggle through to access additional pages on dashboard specific processes	6	**Open Incidents (My Group)**	Number of open incidents assigned to analyst's assignment group(s)
2	**My Open Incidents**	Number of active incidents assigned to analyst	7	**My Groups Incidents Open 7+ Days**	Number of incidents that are in Follow-up and pending for the analyst
3	**My Incidents Open 7+ Days**	Number of incidents open 7+ Days	8	**My Groups Resolved Incidents (Last 30 Days)**	Number of incidents assignment group(s) has resolved last 30 days
4	**My Incidents Resolved in Last 30 days**	Number of incidents analyst has resolved last 30 days	9	**Open Incidents (My Group)**	List of open Incidents for assignment group(s)
5	**My Open Incidents**	List of all incidents currently open for analyst			

Client Service Desk Dashboard Pages



Dashboard Pages are a quick and easy way to keep track of workflow through one central location. Each tab displays a wealth of tools and lists all designed to make the dashboard a quick way to navigate from one duty to the next. Clicking each tab loads the tools recommended for each situation. **My Team** is the default and appears first.

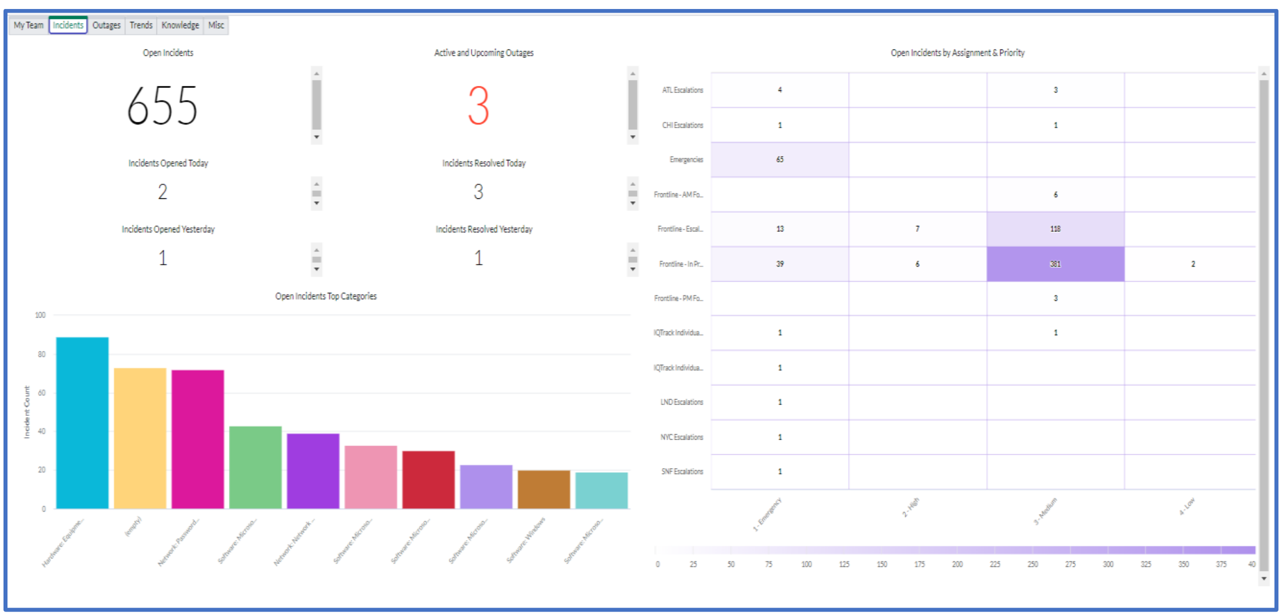
My Team



My Team houses information regarding the individual Analyst's Work and their Team/Work Group's work with lists of Open Incidents, aged Incidents and Resolved Incidents in the last 30 days.

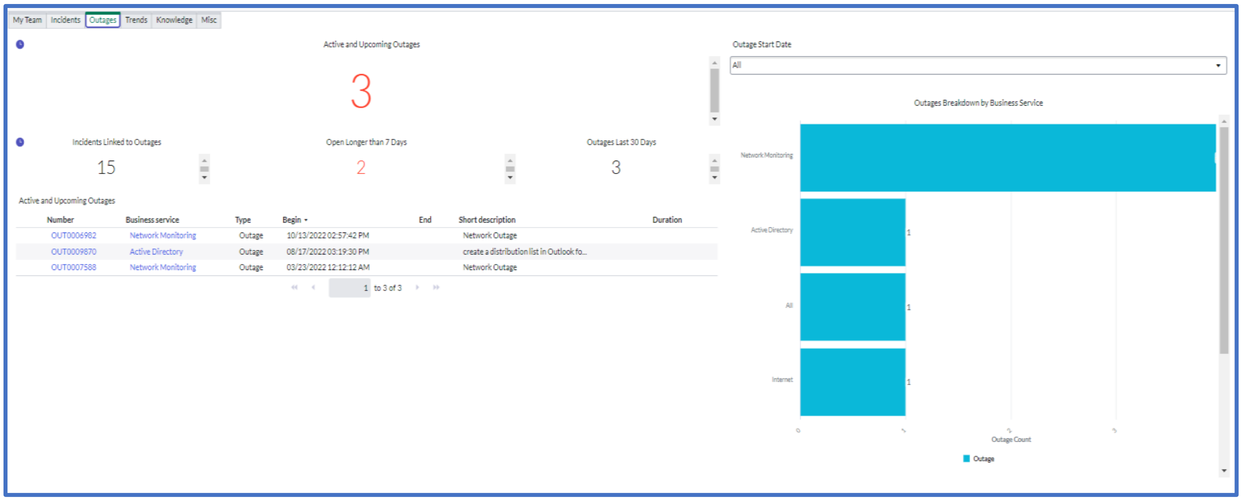
Incidents

The **Incidents** page is the go-to page regarding all things Incident Related. An analyst can see a variety of fields to obtain data regarding aspects of Open Incidents, Resolved Incidents, Outages, Incident Assignments and Top Categories.

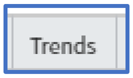


OUTAGES

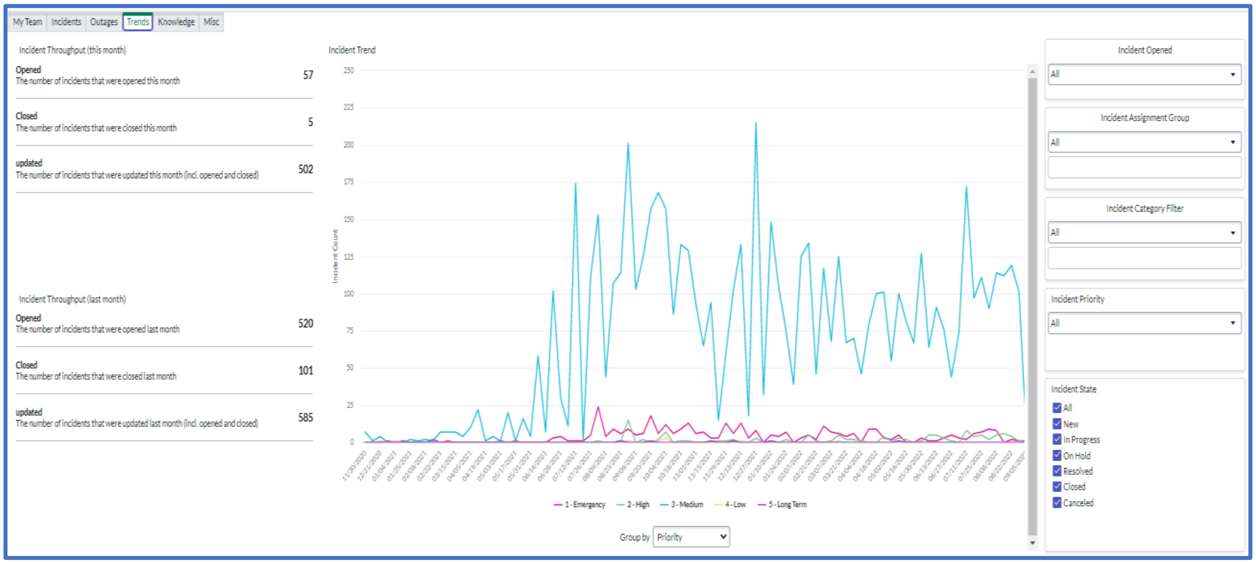
As the name suggests, **Outages** organizes outage information for the firm. This Dashboard allows the analyst to view open active outages and their age as well as a breakdown of which Business Service the Outages apply to in the system.



TRENDS

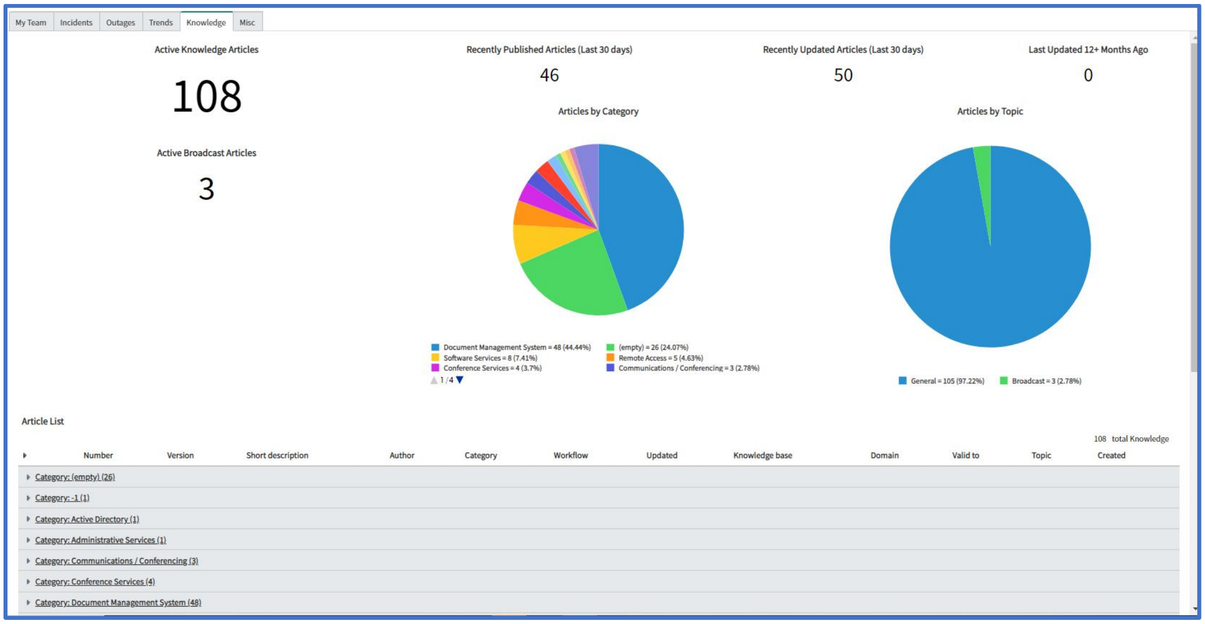


Trends displays data regarding incident trends for the month. There are filters for Grouping and reviewing incident trends under several conditions.



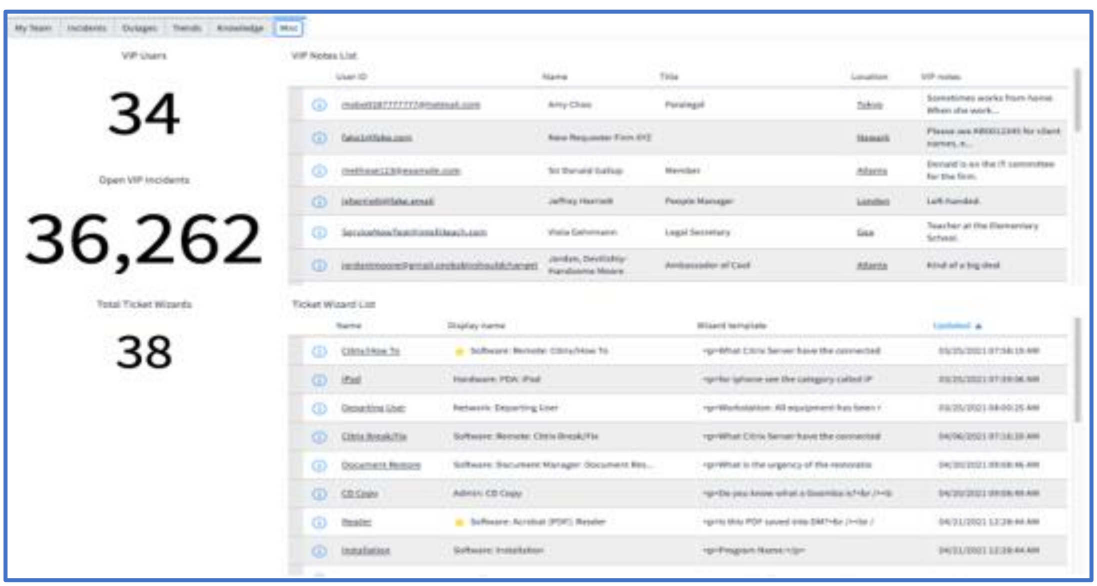
KNOWLEDGE

Knowledge is the one-stop-shop for the Team's current Knowledge Base Articles.



MISC

Misc holds lists of VIP Users, Open VIP Incidents, Total number of Ticket Wizards, VIP Notes Lists and Ticket Wizard Lists.

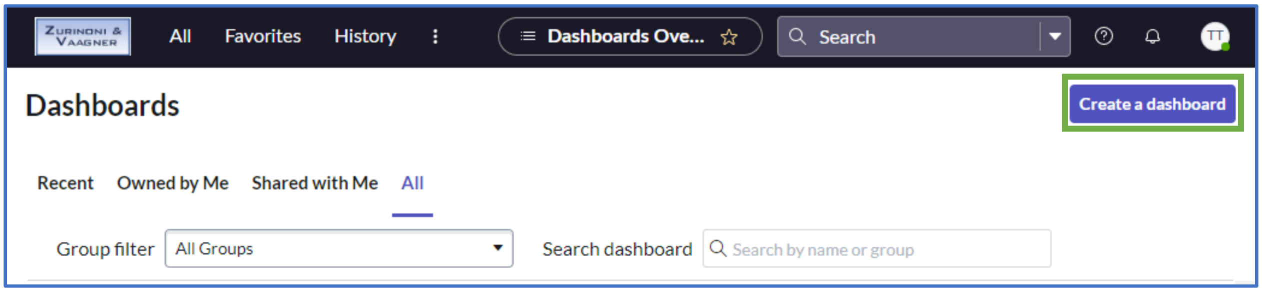


Dashboard Creator

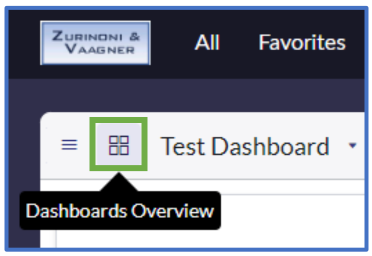
Administrators with Dashboard Creator role can create custom dashboards to share with other users.

Dashboards Overview

The **Create a Dashboard** button is located in the Dashboards Overview.

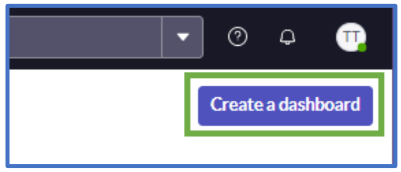


Click **Dashboards Overview** on any dashboard

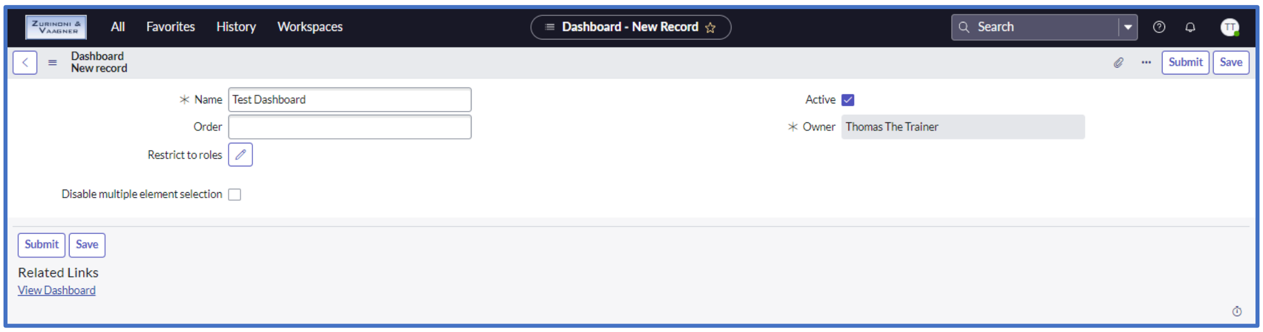


Create a Dashboard

1. On the Dashboard Overview page, click **Create Dashboard.**

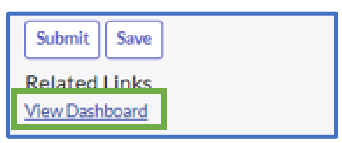


2. Name the Dashboard and fill out the desired fields.

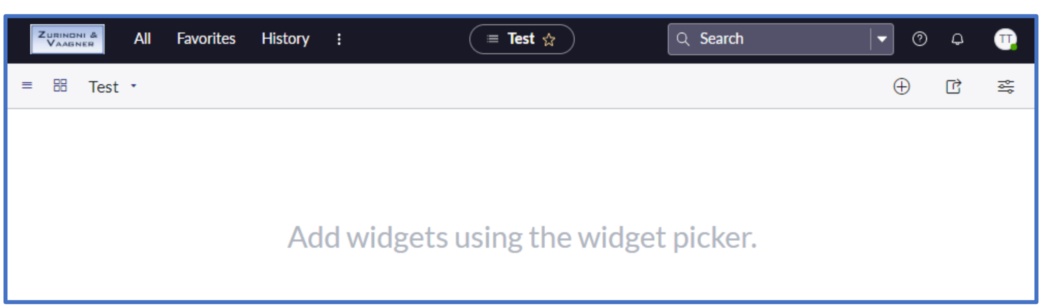


Dashboard Fields	
Order	Enter an Order number to indicate the order the dashboard appears on the dashboard picker. Dashboards display in numerical order.
Restrict to Roles	**[Optional]** Click Restrict to roles edit icon to specify roles that a user must have to access this dashboard.
Active	Clear this field to mark the dashboard **inactive**. Inactive dashboards are only visible to the owner and admins. Admins retain full view, edit, delete, and share privileges on inactive dashboards.
Owner	The dashboard owner. Only a user with the administrator role can change this value.

3. Click **Save**
4. Click **View Dashboard.**



The dashboard is created with no content.

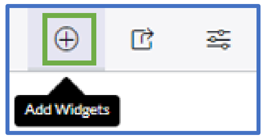


WIDGETS

Objects that can be added to dashboards are called widgets. Widget types include reports, performance analytics, filters, and content blocks.

ADDING WIDGETS

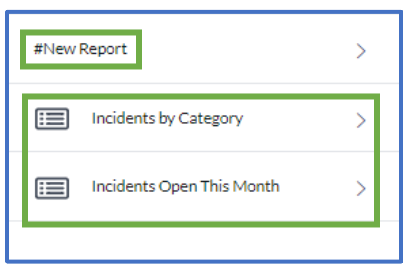
1. To add content to the dashboard, click **Add Widgets**.



2. Select a **Widget Category** from the dropdown

ADDING REPORTS

1. Select **Reports** from the Widget Category Dropdown
2. Click **#New Report** or select an existing report from the list

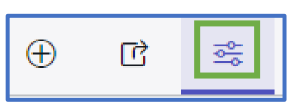


3. Click **Add.** The report is added to the Dashboard.

Important	Reports need to be shared with the user in order for them to be visible

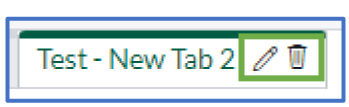
ADDING TABS

1. Click the **Configuration** button



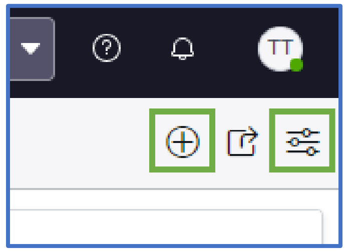
2. Click **Create Tab**

3. Hover over the tab and click the **pencil** to rename it, or the **trash can** to remove it.



Widget Configuration

To Modify the appearance of Widgets, click the **Add Widgets** or **Configuration** buttons.

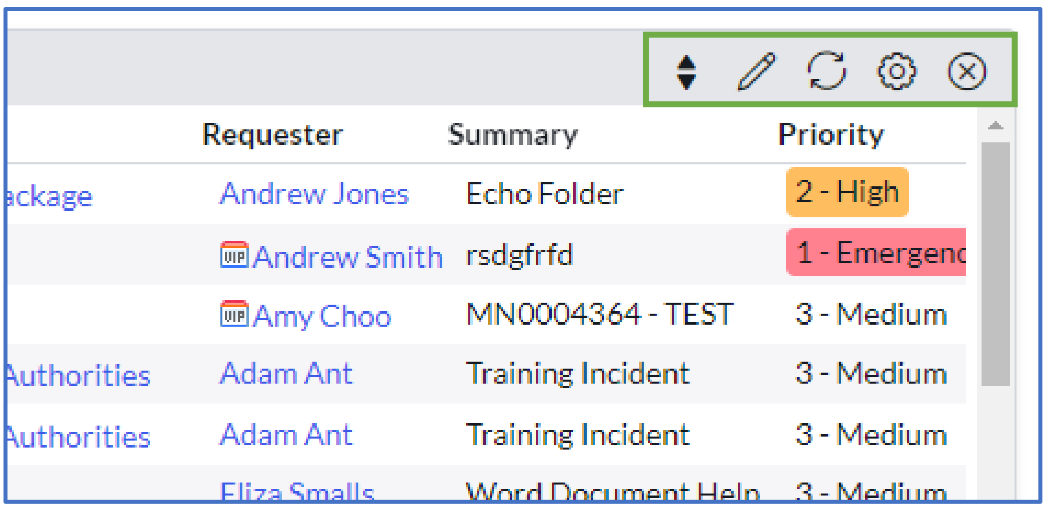


Common customization options

Resizing – Manually drag the edges of the widget to the desired size

Moving – Drag into the desired position

Widget Controls – Hover over a widget to display the widget control options



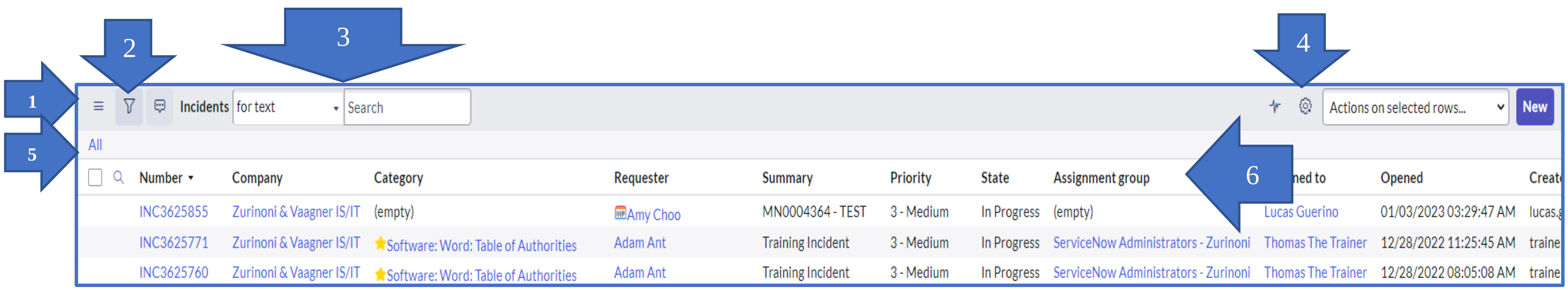
	Increase Height/ Decrease Height	Click to increase the height of the widget. Hold shift + click to decrease height
	Edit Content	Edit report criteria, filters, data source, etc
	Refresh	Refresh the widget
	Edit Widget	Edit the border, header, title, alignment, and colors
	Remove	Removed the widget from the dashboard

Searching Incidents

ServiceNow provides list views along with a variety of search criteria, filters, and groupings to help locate incidents created in the system.

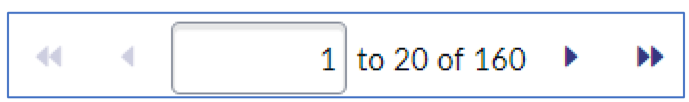
Note:	ServiceNow searches based on **Starts With**. Use an * in front of search terms if no results are listing.

List View Diagram



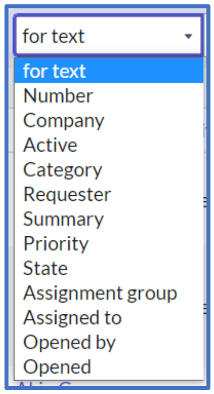
	Description		Description
1	**List controls** (Saved filters & Create Favorite)	4	**Update Personalized List** (Add/remove columns)
2	**Show/hide filter** (Create, Run, Save filters)	5	Applied filter(s)
3	Search drop-down & Search field	6	Columns (Click column header to sort ascending or descending)

For larger lists, use arrows at bottom to navigate pages.

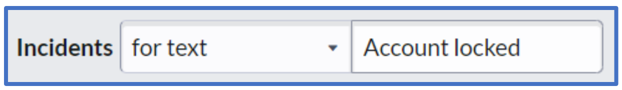


Searching Lists

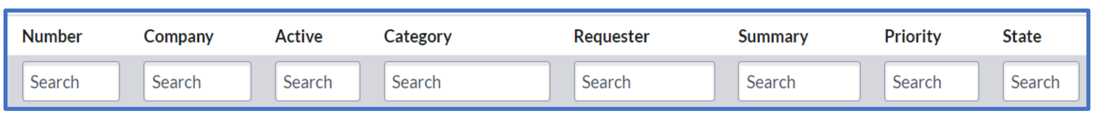
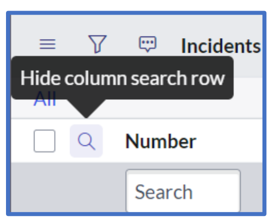
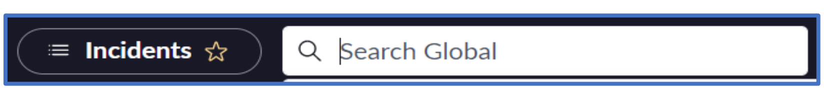
1. From All or Favorites navigation pane, click **Incident - All**
2. Select criteria from the **Search** drop-down menu



3. Enter search terms in the Search field



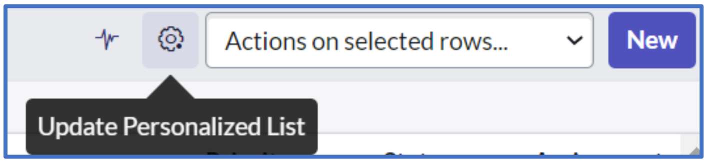
4. Press **Enter**

Notes:	Boolean operators are available to use.
	There is a column for each search criteria with their own search field. The columns can be sorted.  Click the **Show column search row** to enable the search fields. 
	Use the **Show Matching** & **Filter Out** right-click features to tailor the list of incidents
	Clicking incident numbers with the middle mouse button opens them in a separate tab.
	Utilizing the **Global Search** field on the top banner is a quick way to search on interaction, incident, and KB numbers. 

Adding and Removing Columns

Columns can be added and removed from a list view. In addition, they can be reordered.

1. Click **Update Personalized List**



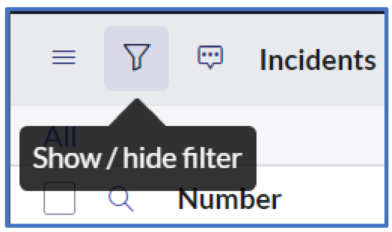
2. Use the arrows to add, remove, and reorder columns
3. Click **OK**

Filtering Lists

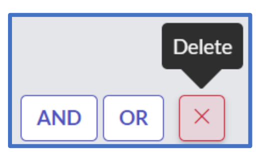
Filters restrict what records appear in a list based on a set of conditions.

ServiceNow filters can be saved, pinned, and added to favorites.

1. Click **Show / hide filter** button



2. Select the field
3. Select the operator
4. Select or enter the value
5. Click **Run**

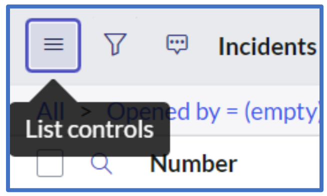
Add and Remove Conditions	
Add top-level condition	Click **New Criteria**
Add dependent condition	Click **AND** or **OR**
Remove a condition	Click the **Delete button** 

Click the **Add sort** button to specify a sort order for the listed records.

Create a Favorite Search

Searches can be saved as a favorite, and they display in Favorites on the navigation pane for quick access.

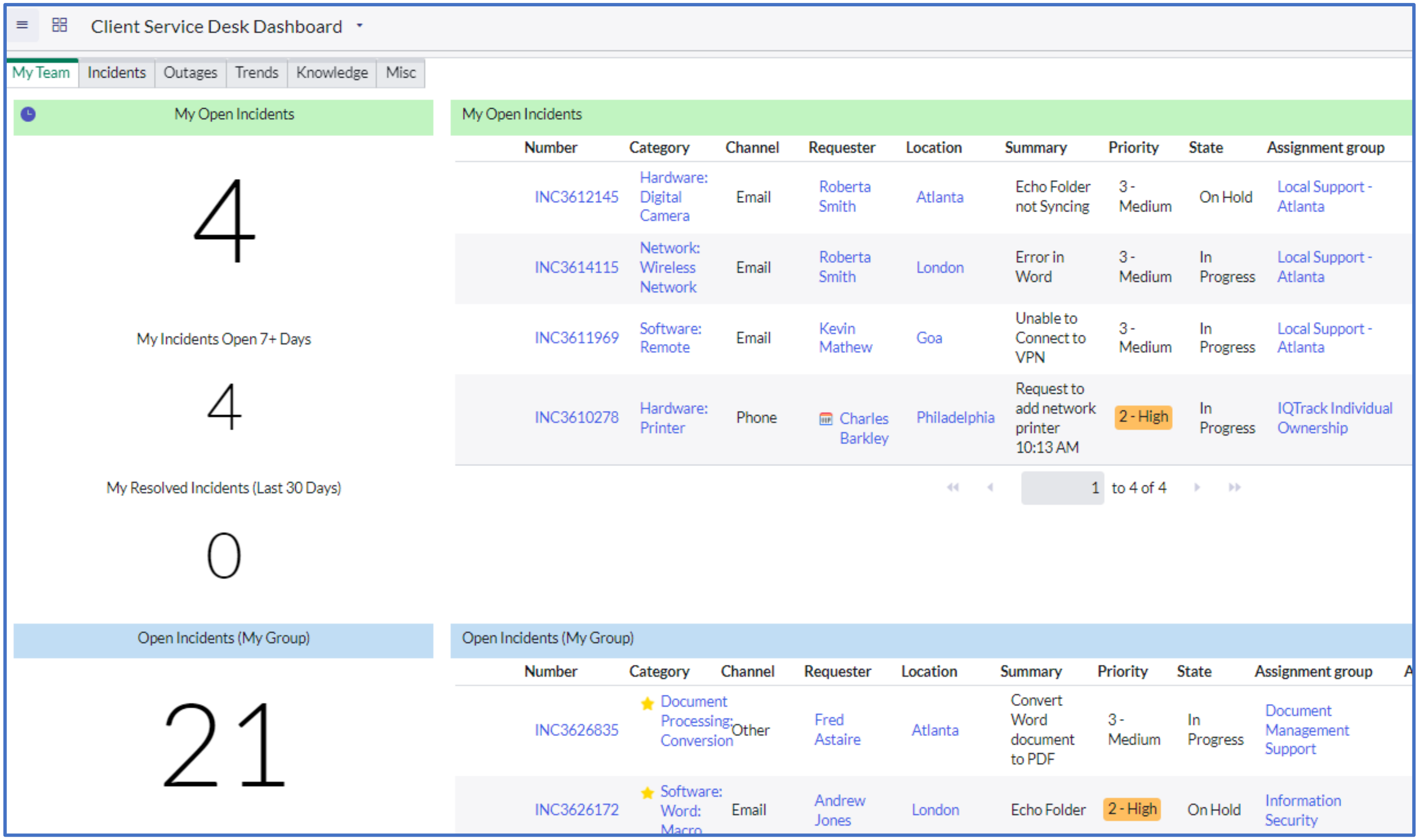
1. Click the **List controls** button



2. Select **Create Favorite**
3. Give the favorite a name
4. Click **Done**

INCIDENT OWNERSHIP

The **My Team** tab in the Client Service Desk Dashboard contains Incidents assigned to the analyst and their assignment group(s).

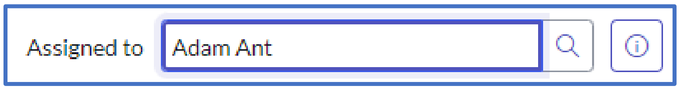


My Open Incidents contains all open Incidents assigned to the analyst.

Open Incidents (My Group) contains all open Incidents assigned to their assignment group(s).

Assign Individual Ownership From Incident Window

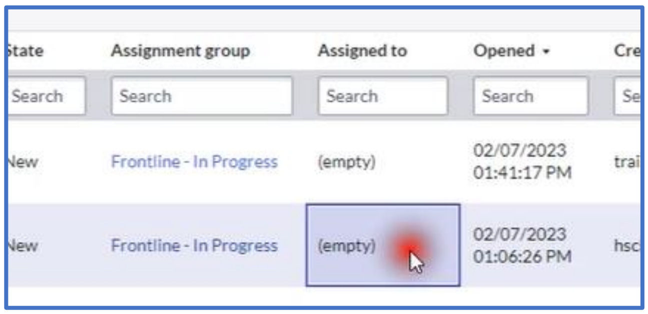
1. Open an Incident
2. Type the analyst's name in the **Assigned to** field, or click the **magnifying glass** to choose an analyst from the list



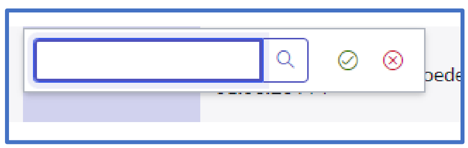
3. Click **Save**

Assign Individual Ownership From List

1. Double click the empty space in the Assigned to field



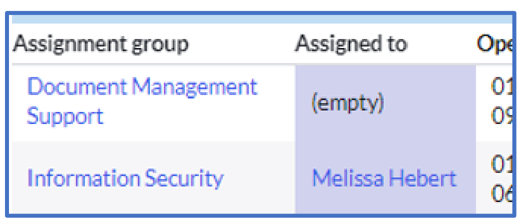
2. Type the analyst's name in the **Assigned to** field, or click the **magnifying glass** to choose an analyst from the list



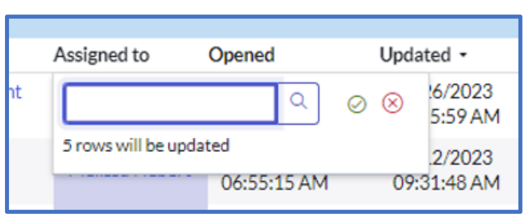
3. Click **Save**

Assign Multiple Incidents at Once

1. In an Incident list, hold **Ctrl** while selecting **Assigned to** on the desired Incidents



2. Double click the empty space in the **Assigned to** field
3. Type the analyst's name in the **Assigned to** field, or click the **magnifying glass** to choose an analyst from the list



4. Click **Save**

Knowledge Management

Knowledge Base Articles are used as a source of information and troubleshooting steps for analysts.

Draft Knowledge Base articles require review and approval by KB Managers. Administrators are assigned the KB Manager role by default.

KB Creation Standards and Guidelines

Analyst Focused

Many KBs are built from communications originally sent to users. Edit out any non-pertinent information and ensure the KB is focused on what an analyst needs during a call. A copy of the user communication can be included as an attachment.

Clear and Concise

Anything that is not relevant should be stripped out of KBs.

Follow a Standard Design

Following the template ensures consistency across KBs and makes it easier to rapidly locate information while on a call.

Searchability

A KB should never consist entirely of screenshots or attachments with no text in the body. If the origin material is a PDF, it must be transposed according to the template. For QRF and other user level documents, an Outline/TOC that states what the attachment covers is appropriate.

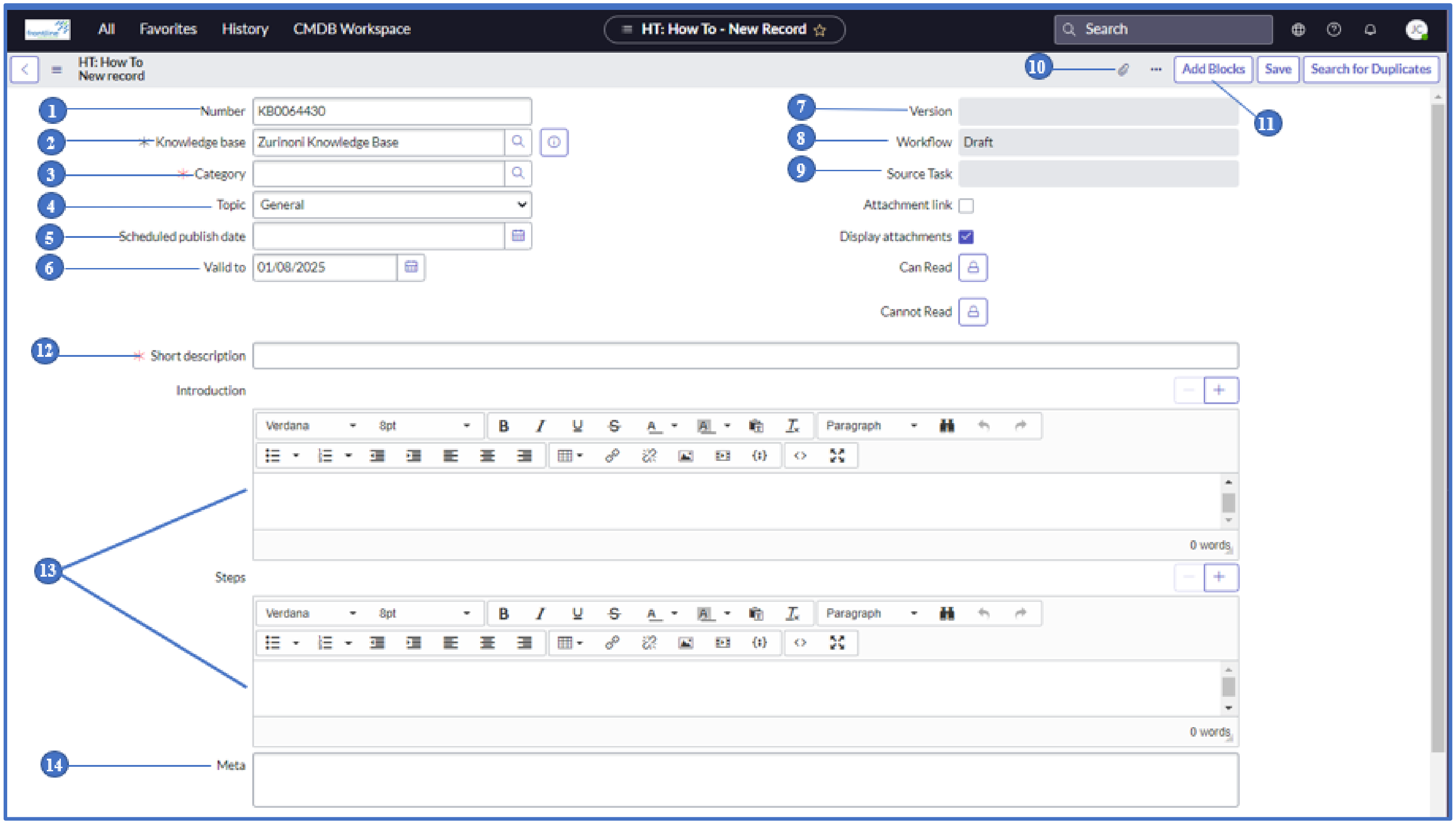
Meta

A KB needs correct keywords to come up in searches, a title that clearly indicates the contents from a search list and is assigned to the correct categories.

Standard Knowledge Base Prefixes and Templates

Knowledge Base Templates	
HT: How To	Articles intended for walking a user through steps
INF: Informational	General information articles such as document processing hours or FAQs
PF: Problem Fix	Resolution steps for specific errors and other problems
QRG: Quick Reference Guide	QRGs can be of any length with longer QRGs represented as an outline in the KB with notable highlights. Most QRGs should be shareable with users and this should be clearly documented in the KB.

Knowledge Article Creation Diagram



1	KB Number	5	Schedule Publish Date	9	Source Task	13	Article Body
2	Knowledge Base	6	Valid To	10	Attachments	14	Meta
3	Category	7	Version	11	Add Knowledge Block		
4	Topic	8	Workflow	12	Short Description		

KB Fields

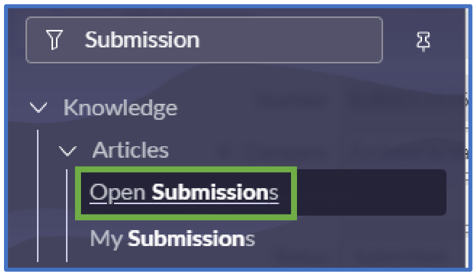
KB Number	Number of the article. This field is automatically set to a number.
Knowledge Base	The knowledge base selected for this article.
Category	The category for this article. Select a Knowledge Base before selecting a category
Topic	General – A standard KB Article Broadcast – A temporary KB Article
Scheduled Publish Date	Date in future when the article is published automatically. Approval process must be completed before this date.
Valid To	The date this knowledge article expires. Articles do not appear in search results after the Valid to date or if the Valid to date is blank.
Workflow	The publication state of the article, such as Draft, In Review, or Published.
Source Task	The task this knowledge article was created in response to, if any.
Short Description	The title of the article. Enter up to 100 characters in this field.
Article Body	Content for the article. Use the editing functions in the HTML editor to create content.
Meta	Keywords for optimizing search results

SUBMISSIONS

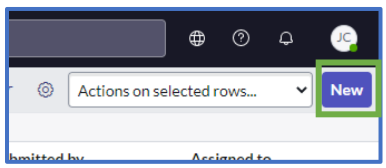
Knowledge submissions allow users to request new articles be created in the knowledge base to fill gaps or incorporate new information provided by clients. Text and attachments auto-import when creating articles. Multiple articles can be created from a single submission.

CREATE A SUBMISSION

1. Navigate to **Knowledge** > **Articles** > **Open Submissions**

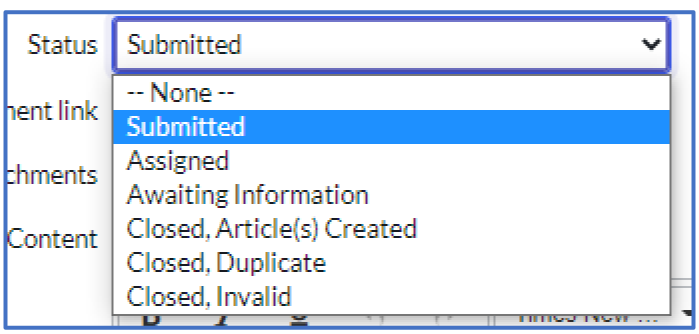


2. Click the **New** button located on the top right of the page



3. Set the status to **Submitted**
4. Enter the information in the KB Content Field
5. Add comments if needed
   a. **Additional comments (Customer visible)** – Visible to Frontline
   b. **Work notes –** A place to keep track of relevant work notes

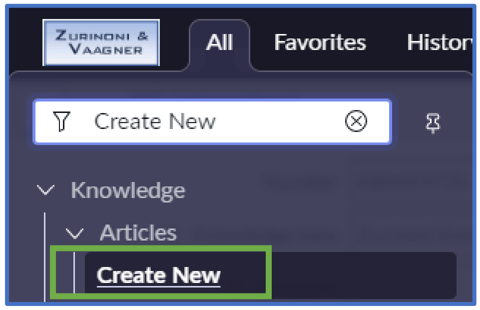
SUBMISSION STATUSES



Submitted	The submission has been created.
Assigned	The submission has been assigned for review
Awaiting Information	More information is needed before an article is created.
Closed, Article Created	A new KB article is created and submitted for publishing.
Closed, Duplicate	An article already exists with this information. The article was updated if the submission contained new information. Please fill in the parent field with the duplicate KB.
Closed, Invalid	No KB article is needed because the information is inaccurate, out of date, or irrelevant to the service desk. (ex: windows patch notes)

Creating a Knowledge Base Article

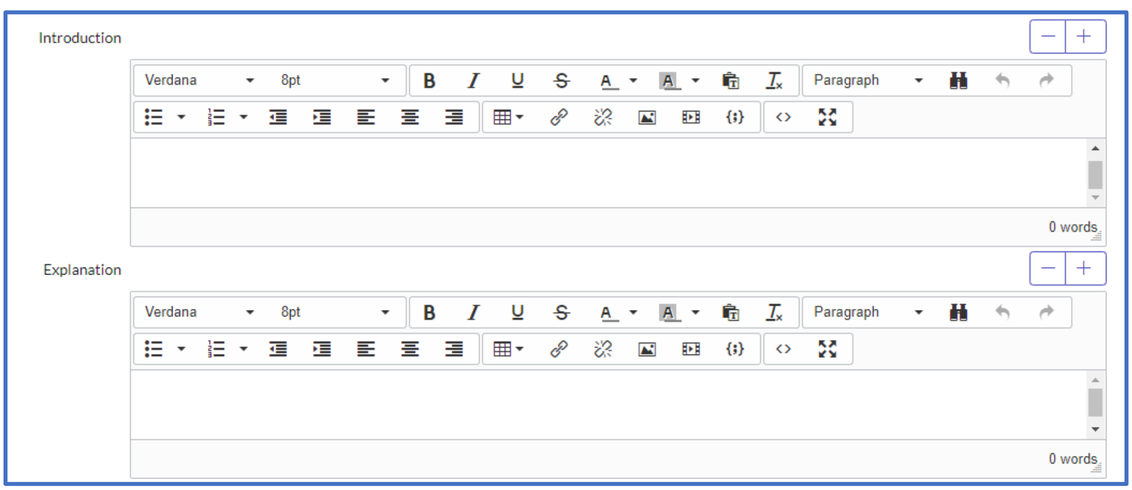
1. Navigate to **Knowledge** > **Articles** > **Create New**



2. Select the appropriate Knowledge Base
   a. **Global:** Generic KB Articles that are managed by Frontline
   b. **Client:** Client specific KB Articles
3. Select an **Article Template**

HT: How To	Articles intended for walking a user through steps
INF: Informational	General information articles such as document processing hours or FAQs
PF: Problem Fix	Resolution steps for specific errors and other problems
QRG: Quick Reference Guide	QRGs can be of any length with longer QRGs represented as an outline in the KB with notable highlights. Most QRGs are shareable with users and this must be clearly documented in the KB.

4. Click **Next**
5. Fill out all required fields and click Save
6. Create the KB in the Article Body.

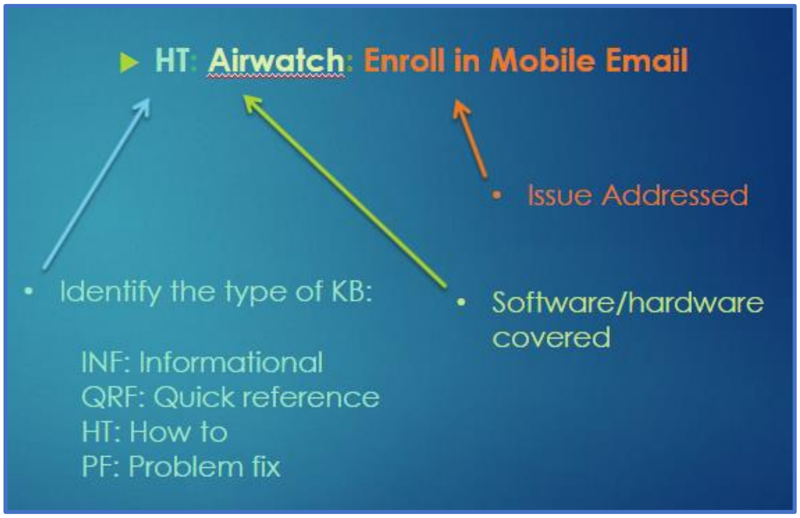


7. Enter relevant search terms in the **Meta** field
8. Attach any relevant files.
9. Click **Publish**

Short Description

Short descriptions are the titles of Knowledge Base Articles. There is 100 character limit. Short descriptions align with the following format:

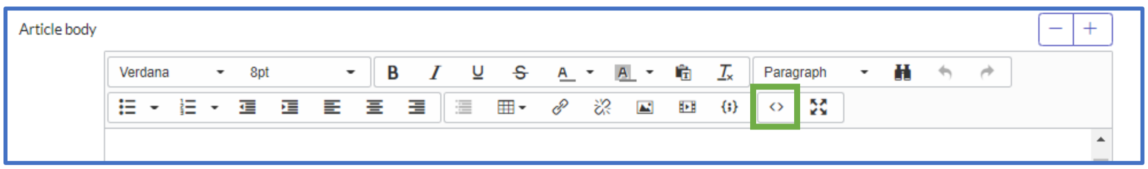
Type: Software/Hardware: Issue Addressed



Article Body

The default editor is WYSIWYG – What You See Is What You Get. It allows content to be edited in a form that resembles its appearance when printed or displayed as a finished product.

To switch to the **HTML editor**, click the **Source Code** button



META

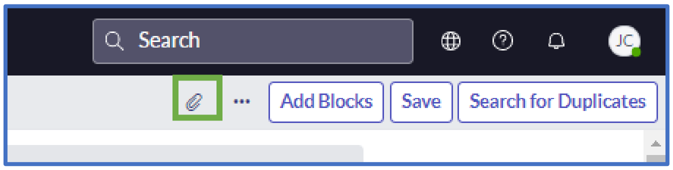
Tags for optimizing search results. These tags are alternate spellings, terms, or common typos.

ATTACHMENTS

Attachments should be clearly named. For larger attachments, include an outline of the document in the Article Body.

UPLOADING ATTACHMENTS

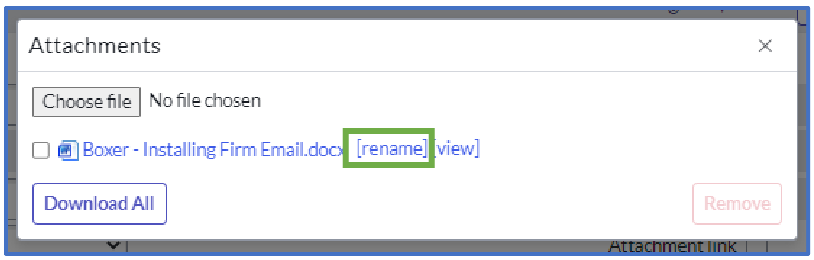
1. Click the **Paperclip**



2. Click **Choose file**
3. Select the desired file and click **Open**
4. Click **X** to close out of attachments window.

RENAMING ATTACHMENTS

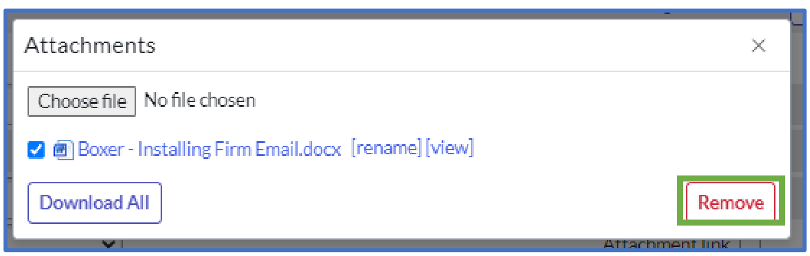
1. Click **[rename]** to the right of the attachment.



2. Place the cursor into the name field and make any necessary edits. Click Enter.

REMOVING ATTACHMENTS

1. Click the Paperclip



2. Check the box next to the attachment and click **Remove**

Knowledge Blocks

Knowledge Blocks contain a single point of information and are inserted into multiple articles. They are specific to knowledge bases, are edited and formatted like a standard KB, and need to go through the same approval process.

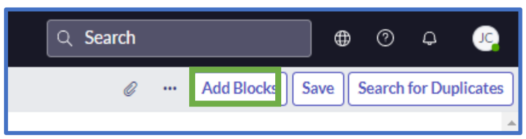
Creating Knowledge Blocks

1. Navigate to **Knowledge** > **Knowledge Blocks** > **Create New Block**

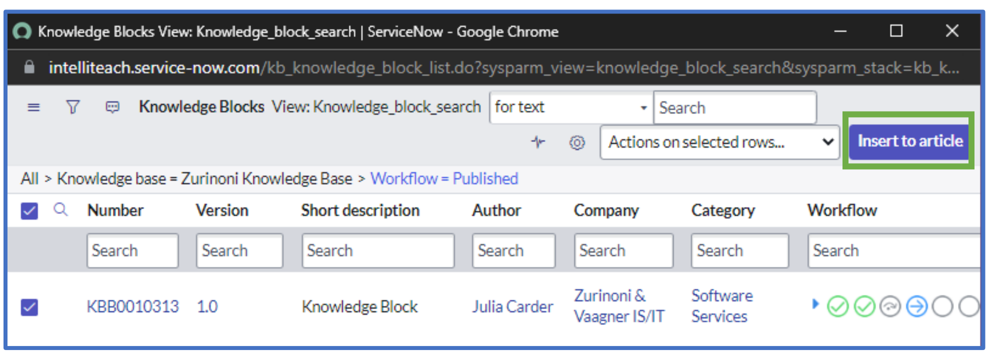
2. Edit and create the Knowledge Block as a Standard KB and go through the same approval process.

Adding Knowledge Blocks to Articles

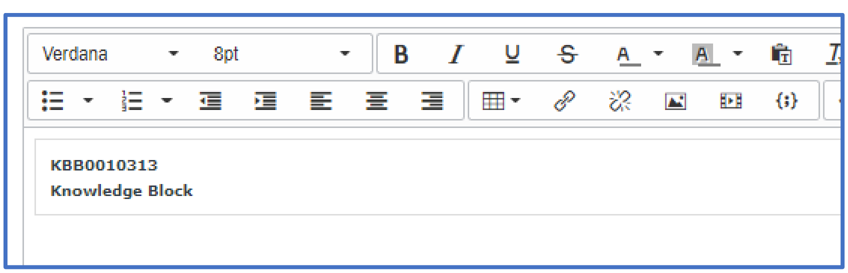
1. After clicking Save on an Article, click **Add Blocks**



2. Check the box to the left of the desired Knowledge Block and click **Insert to Article**



A placeholder is inserted into the article body.



Modifying a Knowledge Base Article

To edit an existing KB, it must be checked out. Checking out a KB creates a new draft version. Each version must go through the full approval process.

1. Click **Edit**
2. Click **Checkout**
3. Make any necessary modifications
4. Click **Publish**. The new article version is submitted for approval

Exception fields that can be modified without checking out/creating a new version:

KB Number
Valid to date
Short description

Article Versions

In ServiceNow articles have versioning. Users identify the stage of the KB article by the numbers that appear after the decimal.

#.0 – Whole numbers are published articles
#.01 – odd decimals indicate draft versions for checked out articles
#.02 – even decimals are drafts submitted for approval

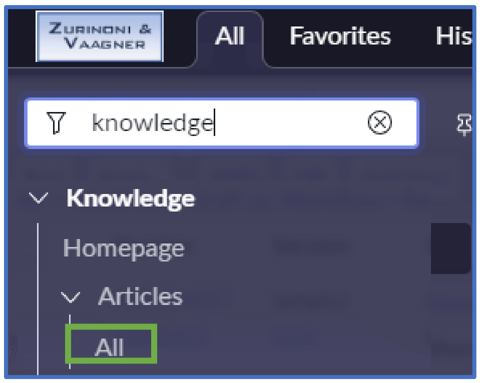
Knowledge Article Approvals

Draft Knowledge articles must be thoroughly reviewed and approved before they are published and visible to analysts.

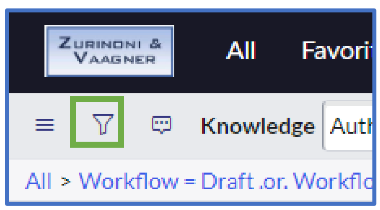
Knowledge approval requests are generated automatically whenever a draft article is submitted for publishing. A separate approval is generated for each user with KB Manager rights, but only one needs to approve for the article to be published.

Create favorite for pending KB Approvals

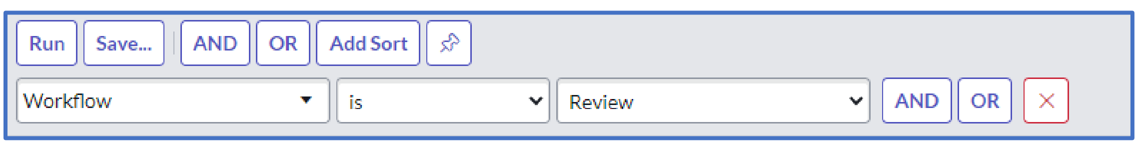
1. Navigate to **All** > **Knowledge** > **All**



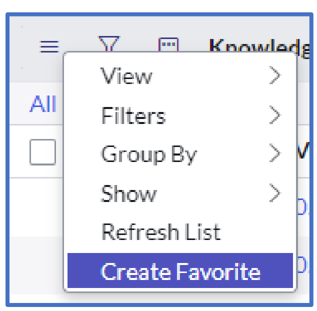
2. Click **show/hide filter**



3. Set option dropdowns to **Workflow** > **is** > **Review**



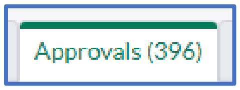
4. Click **Run**
5. Click **hamburger** and select **Create Favorite**



6. Click **Save**

APPROVE AN ARTICLE

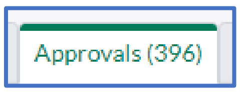
1. Navigate to the **Pending KB Approvals** favorite (see above for steps to favorite)
2. Select an article from the list by clicking the **KB Number**
3. At the bottom of the submission, click the **Approvals** tab



4. Click **Requested** next to the approver name
5. Change the state to **Approved**
6. Click Save

REJECT AN ARTICLE

1. Navigate to the **Pending KB Approvals** favorite (see above for steps to favorite)
2. Select an article from the list by clicking the **KB Number**
3. At the bottom of the submission, click the **Approvals** tab

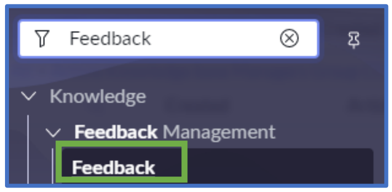


4. Click **Requested** next to the approver name
5. Change the state to **Rejected**
6. Leave a comment stating why the article was rejected
7. Click **Save**

After clicking save, the KB Creator receives a notification email containing a link to the draft article and comments made by the reviewer. After making changes and clicking publish on a draft article again, the article is re-submitted for approval.

Feedback Tasks

When a user flags a knowledge article or adds a comment, a knowledge feedback task is automatically generated. Knowledge feedback tasks are located in **Knowledge > Feedback Management > All Open Tasks**



Leaving Feedback

1. Navigate to the bottom of the KB Article
2. Enter feedback in the comment field.
3. Click **Comment**

Assign a Feedback Task

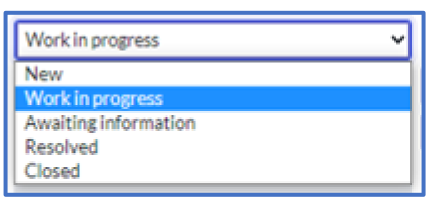
1. Open the Feedback Task
2. Change the Assignment group to **Knowledge Management**
3. Select a user in the **Assigned to** field
4. Click Save

Resolve a Feedback Task

1. Navigate to **Knowledge** > **Feedback Management** > **My Assigned Tasks**.
2. Set the State to **Work In Progress**.
3. Verify the information
   a. If the KB needs to be updated, click **Edit Article**, then **Checkout.**
   b. If a new KB needs to be created, click **Create Article.**
4. When completed, select **Publish** to submit the revised version for approval.
5. Add resolution notes and change the state of the feedback task to **Resolved**.
6. Select a **Resolution Code**

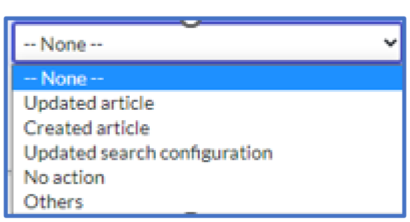
IMPORTANT	Feedback task fields can only be modified by the user in the **Assigned to** field.

Feedback States



New	The Feedback task has been created.
Work in progress	The Feedback task is currently being worked.
Awaiting Information	Further information is needed from the client
Resolved	The KB has been updated, or a new KB has been created.

Resolution Codes



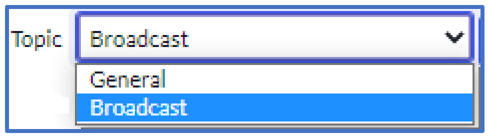
Updated Article	Feedback has been incorporated into an updated version of the article.
Created Article	A new article has been created based on the feedback.
Updated Search Configuration:	Keywords, metadata, and/or short description have been updated to improve search finding
No Action	The feedback did not require any action.
Other	Any resolution that does not fit the above criteria

Broadcasts

Broadcasts are temporary knowledge base articles that are relevant for 2 weeks. If the information is relevant past the **Valid to** date, it is recommended to convert to a General KB.

Create a Broadcast

1. Navigate to **All** > **Knowledge** > **Articles** > **Create New**
2. Select the Knowledge Base and article template, then click **Next**
3. Fill out the Required fields and change the topic to **Broadcast**

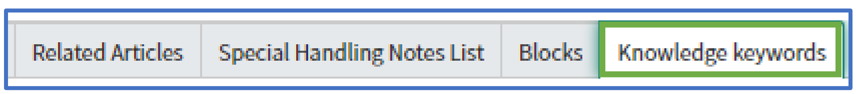


4. Click **Save**
5. Click **Publish** to submit the article for approval

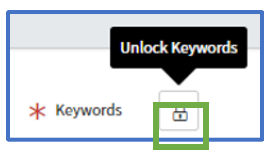
Pin Broadcast to Keyword

Pinning a broadcast to a keyword places the broadcast at the top of the list when searching the Knowledge Base.

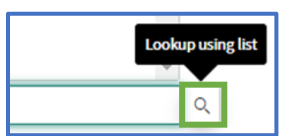
1. Click the **Knowledge keywords** tab at the bottom of the KB window



2. Click **New**
3. Click **Unlock Keywords**



4. Type in the keyword or click **Lookup using list** button for a searchable list



5. Click **Submit**
6. Click **Publish**

Update a Broadcast

1. From the KB window, click **Edit**
2. Click **Checkout**
3. Make updates
4. Click **Publish**

Retire a Broadcast

1. Open the broadcast KB
2. Set the **Valid to** field to the current date and time
3. Click **Update**

Searching the Knowledge Base

Along with past incidents, the ServiceNow Knowledge Base is another solution bank to leverage as a resource.

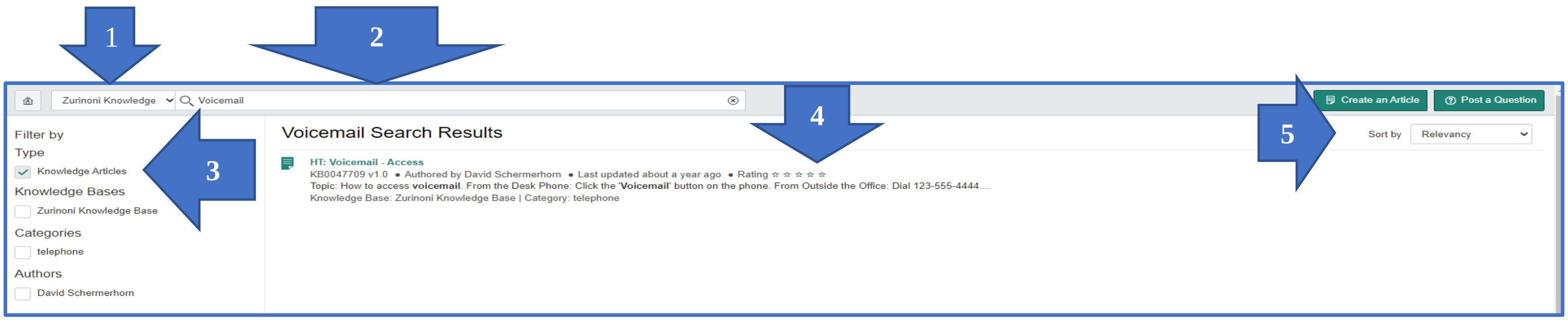
ServiceNow provides a variety of filters and “sort by” options to help locate knowledge base articles.

Subscribe to a knowledge base to receive notifications for updates and newly created knowledge base articles.

Knowledge base articles have prefixes in front of their titles indicating what type of knowledge they contain.

Prefixes	
HT	How To
INF	Informative
PF	Problem Fix
QRF	Quick Reference

Knowledge Base Diagram

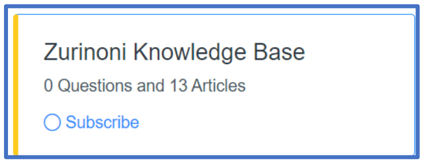


	Description
1	Selected Knowledge Base
2	Keyword search field
3	**Filter by** options
4	Listed search results
5	**Sort by** drop-down menu

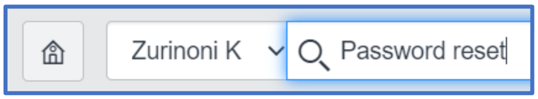
Searching the Knowledge Base

1. From the All or Favorites navigation pane, click **Knowledge - Homepage**

2. Select the company's knowledge base from the homepage or select it from the drop-down menu



3. Enter a minimum of 3 characters in the search field



4. Press **Enter**

Filters	
Knowledge Base	Category
Search Results	Type Knowledge Base Category Author
Sort by Options	
Knowledge Base	Last updated Views
Search Results	Relevancy Last updated Views

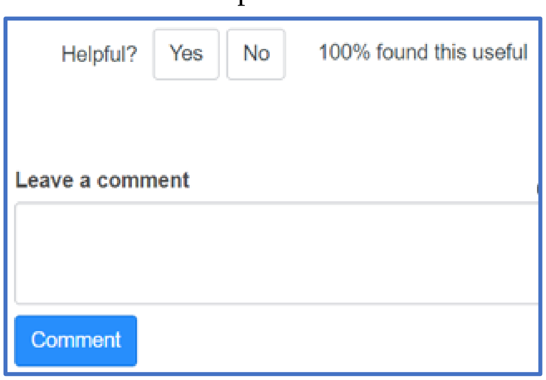
Notes:	Clicking KB links with the middle mouse button opens them in a separate tab.

Commenting on Knowledge Base Articles

Knowledge base articles contain a **Leave a comment** section towards the bottom for analysts to provide feedback on articles.

- Example: "The echo directory location has changed for Citrix users. Here is the new location."

In addition, analysts can mark if the KB is helpful or not.



OUTAGES

An outage is a systemic issue affecting multiple customers. Outage notifications are created in ServiceNow for planned and un-planned events.

There are 3 types of outages in ServiceNow:

Type	Description
Degradation	Multiple customers are experiencing slowness with a resource.
Outage	Full outage with multiple customers unable to access a critical resource.
Planned Outage	A planned outage for up-coming upgrades and maintenance.

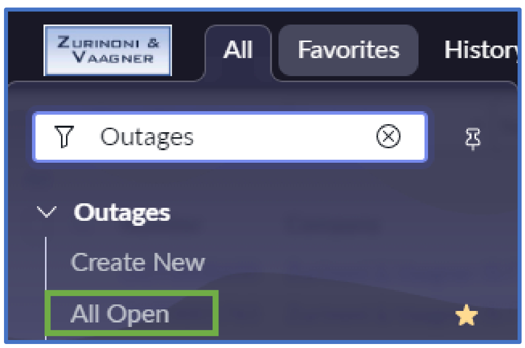
Outages must be associated with a corresponding business service.

Business Service Examples
Active Directory
Exchange
Document Management System

IMPORTANT:	If fields, buttons, or list results are missing, click **Save**

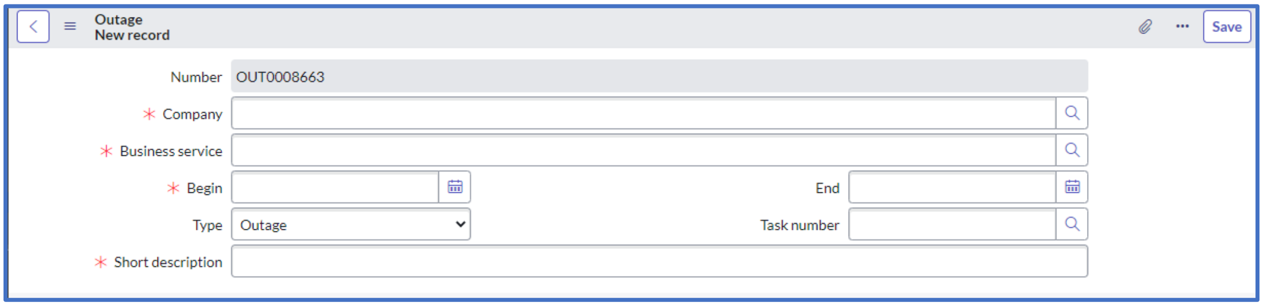
VIEWING OPEN OUTAGES

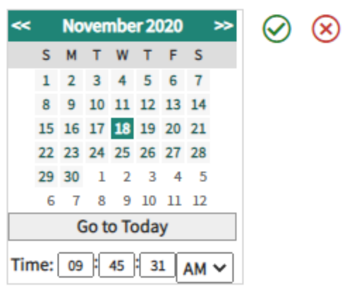
1. Navigate to **All** > **Outages** > **All Open**



Create an Outage

1. Go to **All** > **Outages** > **Create New**
2. Fill out the required fields and enter the outage information in the **Details** field.



Required Fields	
Field	**Description**
Business Service	Select the corresponding business service – Click **Save**
Begin	Set the time and date the outage started or when a planned outage begins 
Short description	Short concise description of the outage

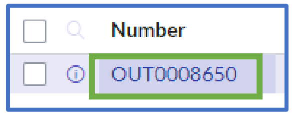
3. Click **Save**

Additional Fields	
Field	**Description**
Type	Select the type of outage
Duration	The duration of the outage. If not populated, this field automatically populates based on the difference between the begin and end values
End	Set the time and date the outage ended or is planned to end
Task Number	This field can be used for the initial incident number. The incident a TML uses when contacting local IT.
Details	Document the details of the outage

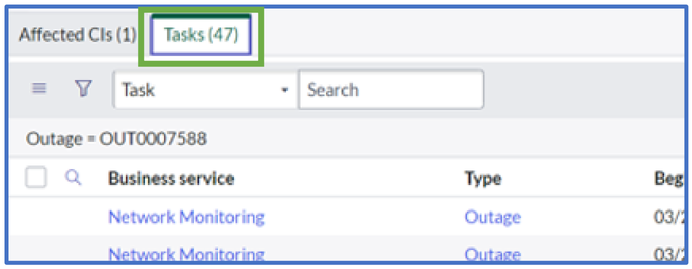
IMPORTANT:	Click **Save** after entering or changing a field to ensure that the data is fully saved to the form.

View Incidents attached to Outage

1. Click the outage number



2. Select the **Tasks** tab towards the bottom of the window

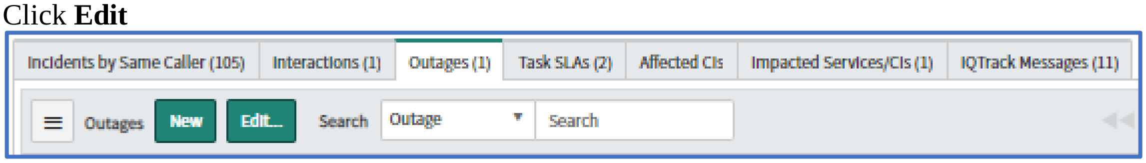


Unlink Incidents from Outages

Unlinking incidents from outages is rarely needed, but it can be done if needed. (Example: Incident is attached to the wrong outage.)

Unlink from an Incident Window:

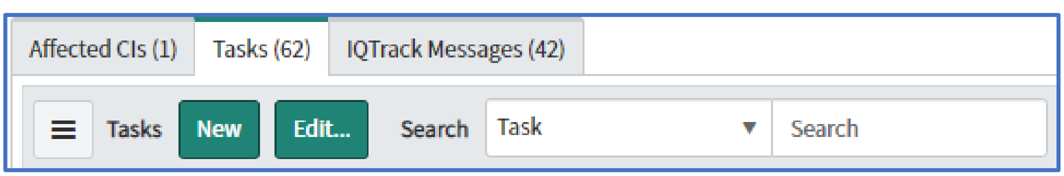
1. Click the Outages tab towards the bottom of the window
2. Click **Edit**



3. Select the outage in the list
4. Click the **Remove** button (back arrow)
5. Click **Save**

Unlink from an Outage Window:

1. Click the **Tasks** tab toward the bottom of the window
2. Click **Edit**



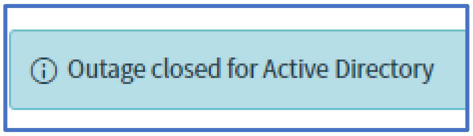
3. Select the incident number in the list
4. Click the **Remove** button (back arrow)
5. Click **Save**

CLOSE AN OUTAGE

Once an outage is resolved, the outage is ended in ServiceNow.

1. Set the **End** date field to the current date and time
2. Click **Save**

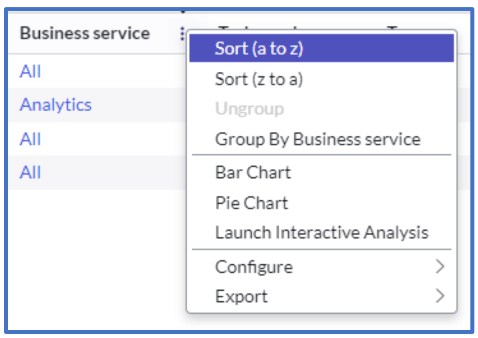
   A notification displays at the top of the window confirming the outage is closed in the system.



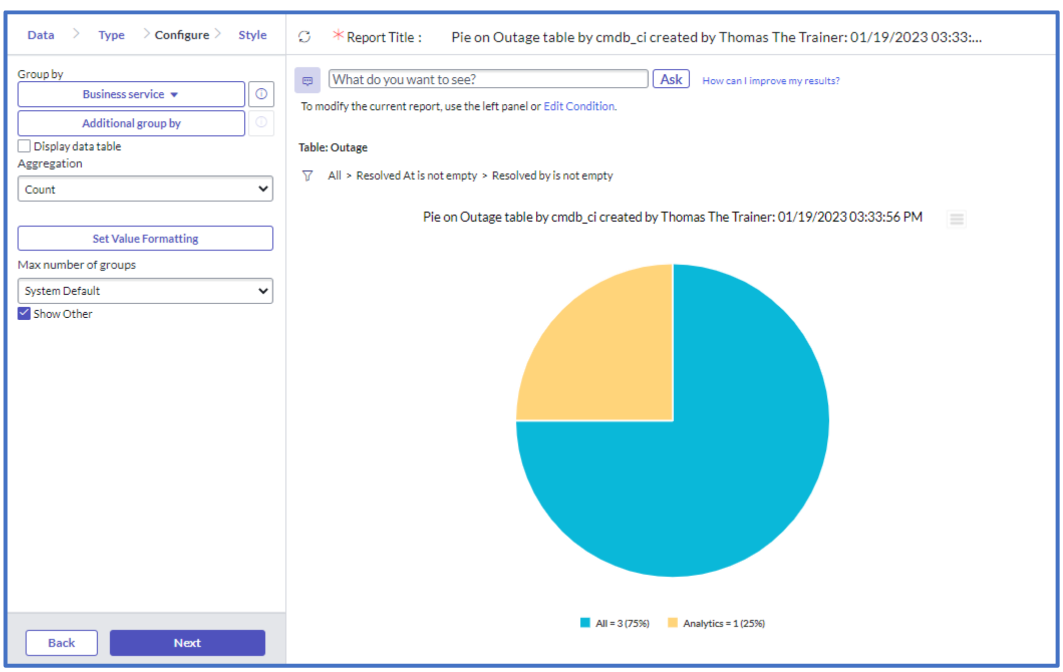
Notes:	It is not recommended to use the **Begin Outage Now** and **End Outage Now** links. Use the fields to begin and end outages.
	It is not recommended to use the **Insert** and **Insert and Say** buttons.

CREATE REPORT FROM OUTAGE LIST VIEW

Right click a column and select **Bar Chart** or **Pie Chart**

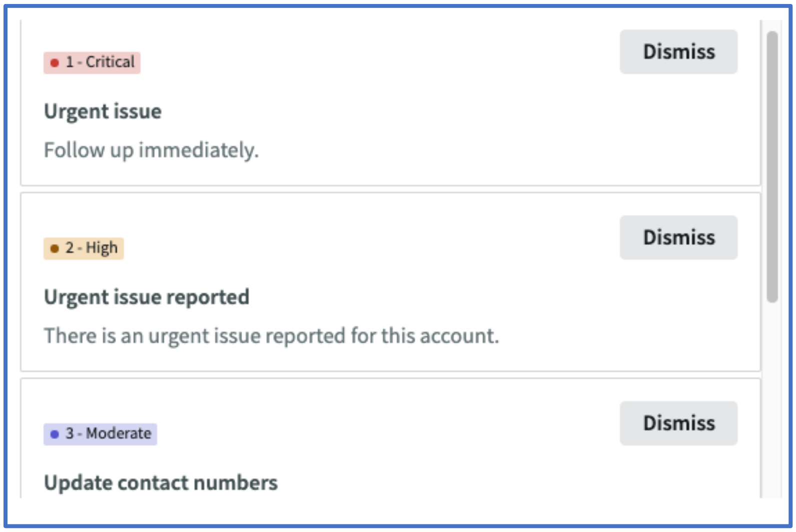


PIE CHART EXAMPLE



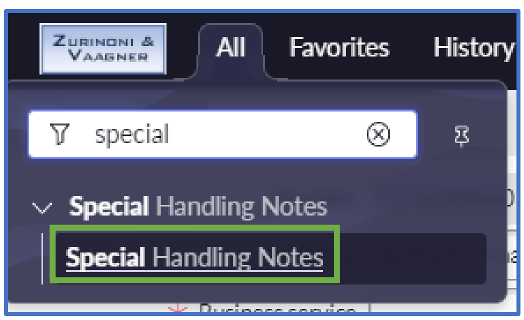
Special Handling Notes

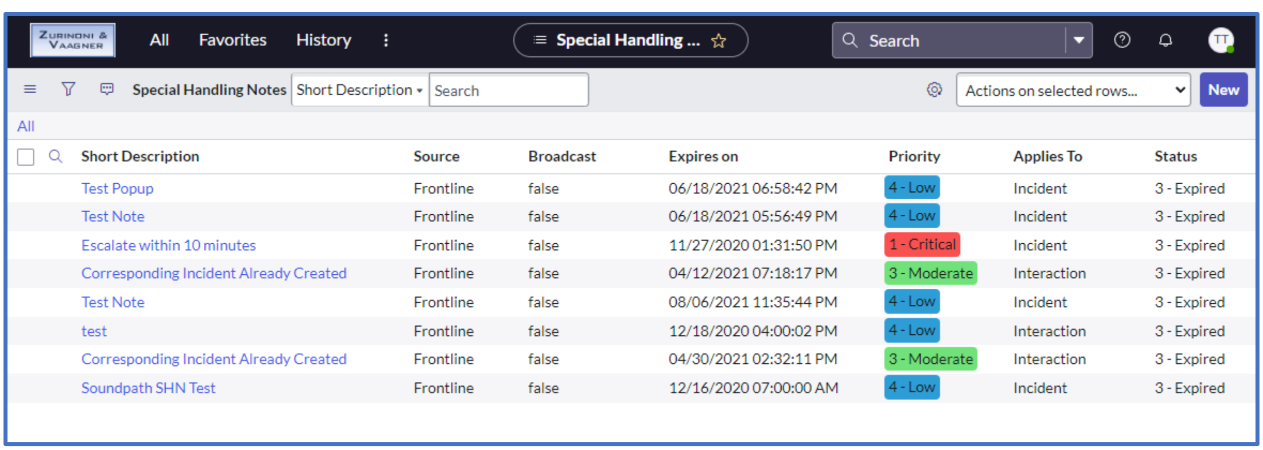
Special Handling Notes are alerts that provide concise and critical information in a pop-up when an incident window is saved. They are based on various fields in the incident window and are used to bring attention to important KB updates, changes in policy, and special handling procedures



View Special Handling Notes

1. Type **Special** in the Filter Navigator field
2. Select **Special Handling Notes**

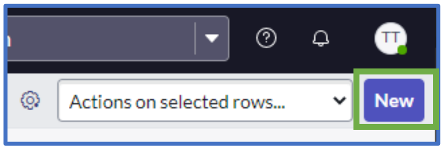




Short Description	Source	Broadcast	Expires on	Priority	Applies To	Status
Test Popup	Frontline	false	06/18/2021 06:58:42 PM	4 - Low	Incident	3 - Expired
Test Note	Frontline	false	06/18/2021 05:56:49 PM	4 - Low	Incident	3 - Expired
Escalate within 10 minutes	Frontline	false	11/27/2020 01:31:50 PM	1 - Critical	Incident	3 - Expired
Corresponding Incident Already Created	Frontline	false	04/12/2021 07:18:17 PM	3 - Moderate	Interaction	3 - Expired
Test Note	Frontline	false	08/06/2021 11:35:44 PM	4 - Low	Incident	3 - Expired
test	Frontline	false	12/18/2020 04:00:02 PM	4 - Low	Interaction	3 - Expired
Corresponding Incident Already Created	Frontline	false	04/30/2021 02:32:11 PM	3 - Moderate	Interaction	3 - Expired
Soundpath SHN Test	Frontline	false	12/16/2020 07:00:00 AM	4 - Low	Incident	3 - Expired

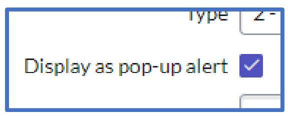
Create a Special Handling Note

1. In the Special Handling Notes list, click **New**

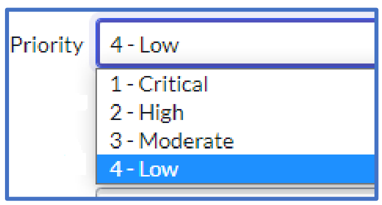


2. Fill out the **Short Description** and **Message** fields

3. Set Type field to **Standard** or **Conditional**
4. Enable **Display as pop-up alert**

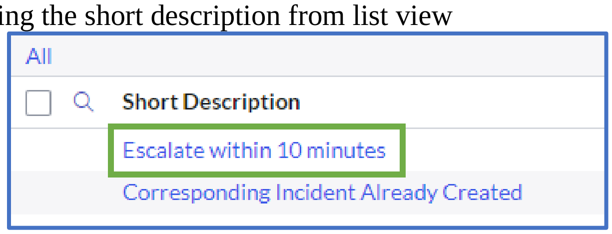


5. Set the **Priority** field



Update a Special Handling Note

1. Open the note by clicking the short description from list view



2. Make any necessary changes
3. Click **Update**

Remove a Special Handling Note

1. Open the Note by clicking the short description from list view
2. Change the expiration date on or before the current date and time.

User Admin

Client Administrators manage users, departments, and locations along with creating and assigning user groups.

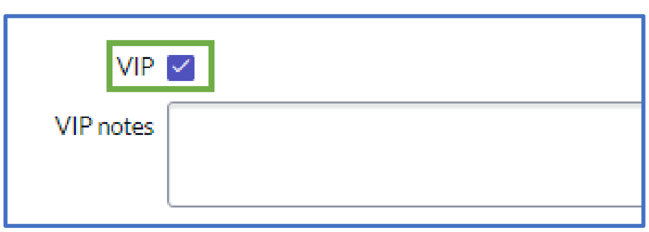
In general, user accounts sync from Azure/AD apart from VIP notes which need to be manually added.

Terms	Definitions
Users	User records store information on individuals in the client's instance of ServiceNow. Users are assigned to groups and roles to determine what records and actions they can access when logged in.
User ID	The user ID must be the user's email address to ensure a unique username is associated with their SSO. If this field is changed, the user is not able to log into ServiceNow.
Roles	Roles control access to features and capabilities in applications and modules.
Groups	A group is a set of users who share a common purpose. Members of groups perform tasks such as approving change requests, resolving incidents, receiving email notifications, or performing change request tasks. A good practice is to assign roles to groups rather than to users. If a user moves to another group, the role assigned to the new group is applied automatically.
Administrator tools	System administrators can leverage admin tools to manage user sessions, audit user roles, and impersonate user accounts. These tools enable admins to test permissions and troubleshoot access issues.
User Incidents	The incident tabs at the bottom of the user record list any incidents where the current user is in the **Assigned to, Contact,** or **Requestor** fields

IMPORTANT	Client Administrators cannot modify roles in ServiceNow. Please reach out to Frontline representative for any assistance. Frontline only adds roles to groups, not individual users.

Adding VIP Notes

1. Go to **All** > **User Administration** > **Users**
2. Click the **User ID** from the list
3. Check the box next to **VIP**
4. Enter the note in the **VIP notes** field.



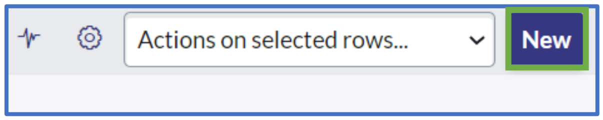
5. Click **Save**

Create Non-AD Managed User Account

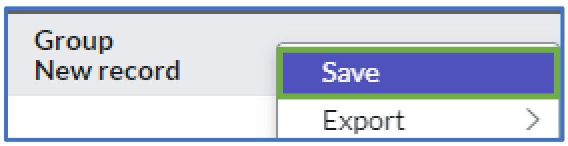
In general, user accounts sync from Azure/AD.

The user ID must be the user's email address to ensure a unique username.

1. Go to **All** > **User Administration** > **Users**
2. Click **New**



3. Complete top-level fields
4. Right-click top banner > **Save**



Modify Non-AD Managed User Account

1. Go to **All** > **User Administration** > **Users**
2. Select user from list view
3. Make desired modifications
4. Click **Save**

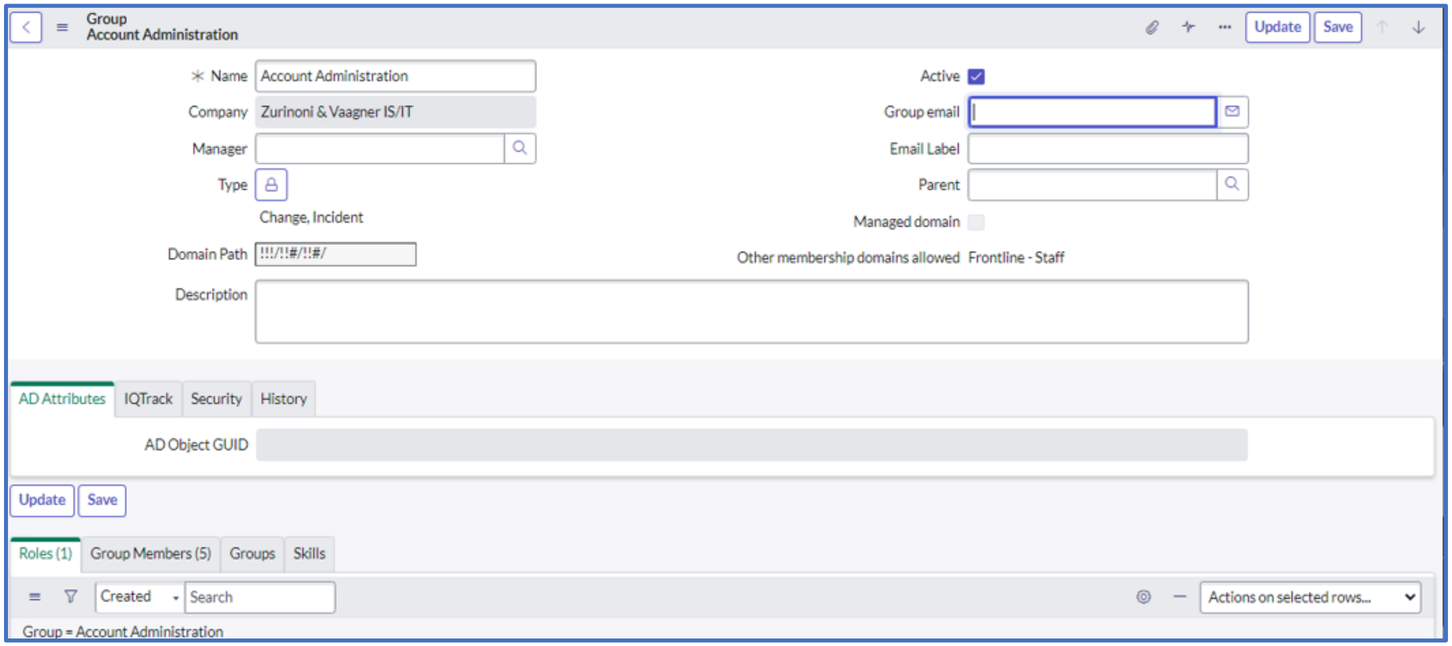
Additional ServiceNow Resource

Topic	ServiceNow URL
Create a User	https://docs.servicenow.com/bundle/sandiego-platform-administration/page/administer/users-and-groups/task/t_CreateAUser.html

Groups

Members of groups perform tasks such as approving change requests, resolving incidents, receiving email notifications, or performing change request tasks. Assign every user to at least one group. Groups can also be assigned to other groups, creating parent groups and subgroups.

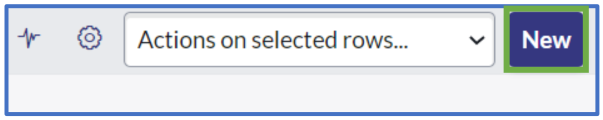
IMPORTANT	Reach out to FMS Representative for assistance in assigning Roles after creating a new group in ServiceNow.



Manager	Receives all notification from group
Group email	Sends notifications to the group email instead individual emails to all group users
Type	Select the forms that display the group i.e. Incident, Change form, problem type.
	To hide the group on any form, select **Internal_non_assignment**
	For the group to appear as an option in the escalation process, Incident must be selected
Roles	A list of roles that cannot be edited
Group Membership	Click the **Edit** button to assign a group to the user record
Groups	Contains any related Child groups

Create a Group

1. Go to **All** > **User Administration** > **Groups**
2. Click **New**

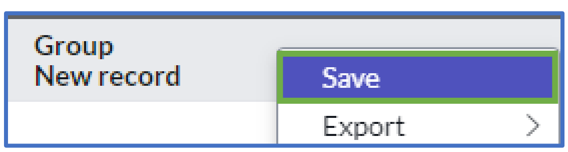


3. Complete top-level fields

Field	Description
Name	Group's name
Manager	The individual in this field receives all email notifications for group.
Type	Controls group's visibility in different types of ServiceNow forms **Note**: Select **internal_non_assigned** in **Select target record** field to suppress group from any forms in ServiceNow.
Group Email	Sends notifications to entered email address that normally sends to the members of the group. Example: Email distribution group
Parent	Group's Parent Group

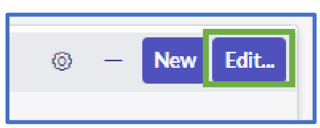
IMPORTANT	**Incident** must be added to the **Type** field if group is used by FMS ServiceDesk to refer (escalate) incidents.

4. Right-click top banner > **Save**



Group Members Tab

Click **Edit** to add and remove users.



Groups Tab

Displays a list of child groups.

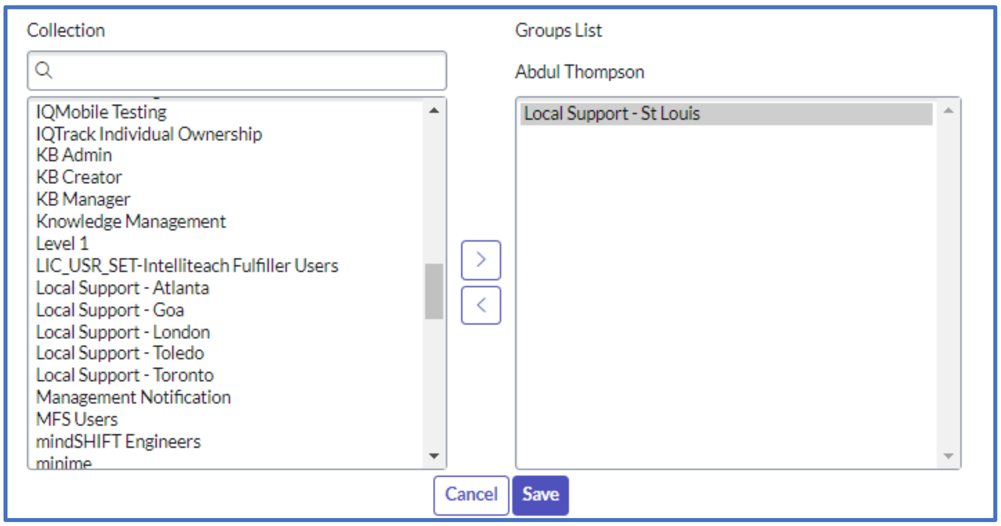
Additional ServiceNow Resource

Topic	ServiceNow URL
Create a Group	https://docs.servicenow.com/bundle/sandiego-platform-administration/page/administer/users-and-groups/task/t_CreateAGroup.html

Manually add groups to a user

1. Go to **All** > **User Administration** > **Users**
2. Click the **User ID** from the list
3. At the bottom of the record, click the **Groups** tab
4. Click **Edit**

5. Double click the desired group on the left to add it to the records **Groups List**



6. Click **Save**

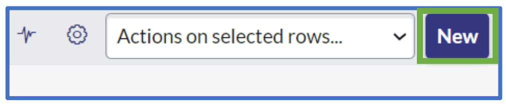
Departments

Departments provide another way to categorize users, groups, and assets.

To view a list of departments, navigate to **All > User Administration > Departments**

Create Department

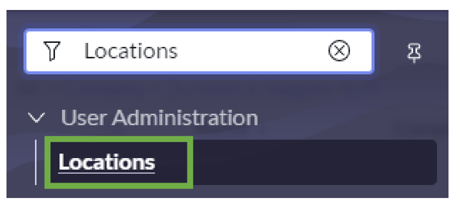
1. Navigate to **All** > **User Administration** > **Departments** and click **New**

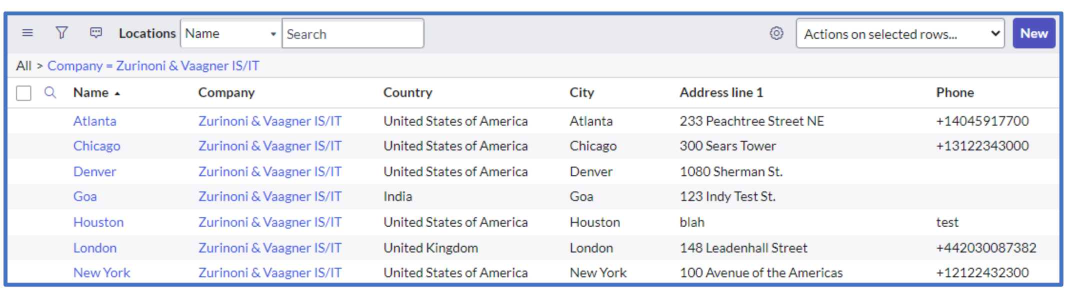


2. Enter or modify the department name, ID, and description
3. [Optional] Add a department head, primary contact, or both from list of users
4. [Optional] Add the parent department, if applicable
5. Click **Save**

Locations

To view a list of office locations, navigate to **All > User Administration > Locations**





Name	Company	Country	City	Address line 1	Phone
Atlanta	Zurinoni & Vaagner IS/IT	United States of America	Atlanta	233 Peachtree Street NE	+14045917700
Chicago	Zurinoni & Vaagner IS/IT	United States of America	Chicago	300 Sears Tower	+13122343000
Denver	Zurinoni & Vaagner IS/IT	United States of America	Denver	1080 Sherman St.	
Goa	Zurinoni & Vaagner IS/IT	India	Goa	123 Indy Test St.	
Houston	Zurinoni & Vaagner IS/IT	United States of America	Houston	blah	test
London	Zurinoni & Vaagner IS/IT	United Kingdom	London	148 Leadenhall Street	+442030087382
New York	Zurinoni & Vaagner IS/IT	United States of America	New York	100 Avenue of the Americas	+12122432300

Create Office Location

1. Navigate to **All** > **User Administration** > **Locations** and click **New**
2. Complete fields
3. Click **Save**

Impersonator

Administrators can impersonate other users for testing purposes using the Impersonator feature in ServiceNow.

When impersonating another user, the administrator has access to exactly what that user can access in the system, including the same menus and modules. The instance records what the administrator does while impersonating another user as being done by the impersonated user.

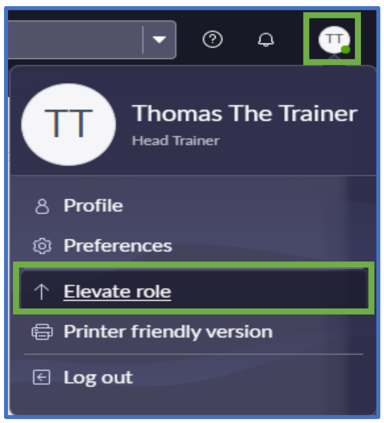
The following actions or conditions cause a user impersonation to end:

- The administrator impersonates a different user.
- The administrator session ends, for example after an administrator logs out of their instance of ServiceNow.

Enable Impersonator

This feature is enabled in administrator **User Menu** drop down.

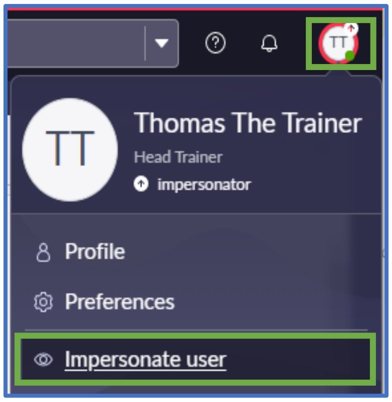
1. Click **User Menu** drop down
2. Select **Elevate role**



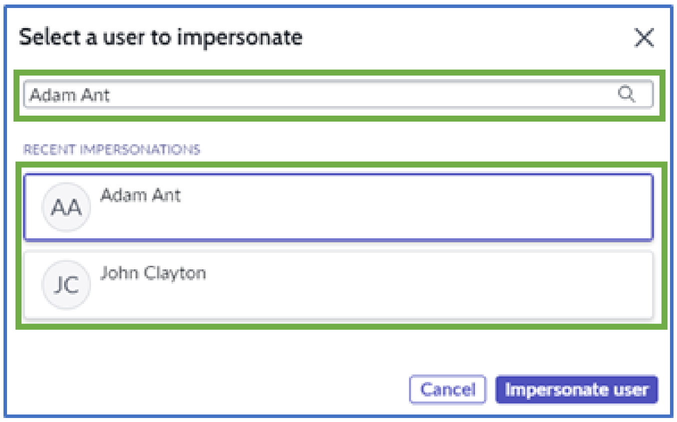
3. Enable **Impersonator** checkbox
4. Click **Update**

Impersonate Another User

1. Click **User Menu** drop down
2. Select **Impersonate user**

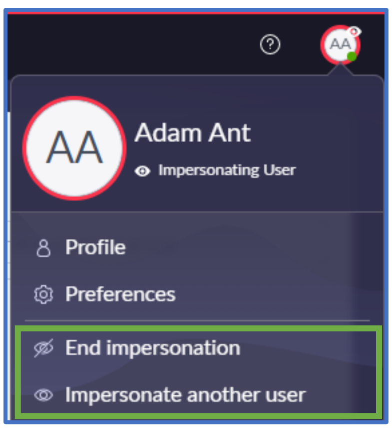


3. Search for and select user in search field **OR** select user from **Recent Impersonations** list



4. Click **Impersonate user**

To end the impersonating session or impersonate another user, select either option from **User Menu.**



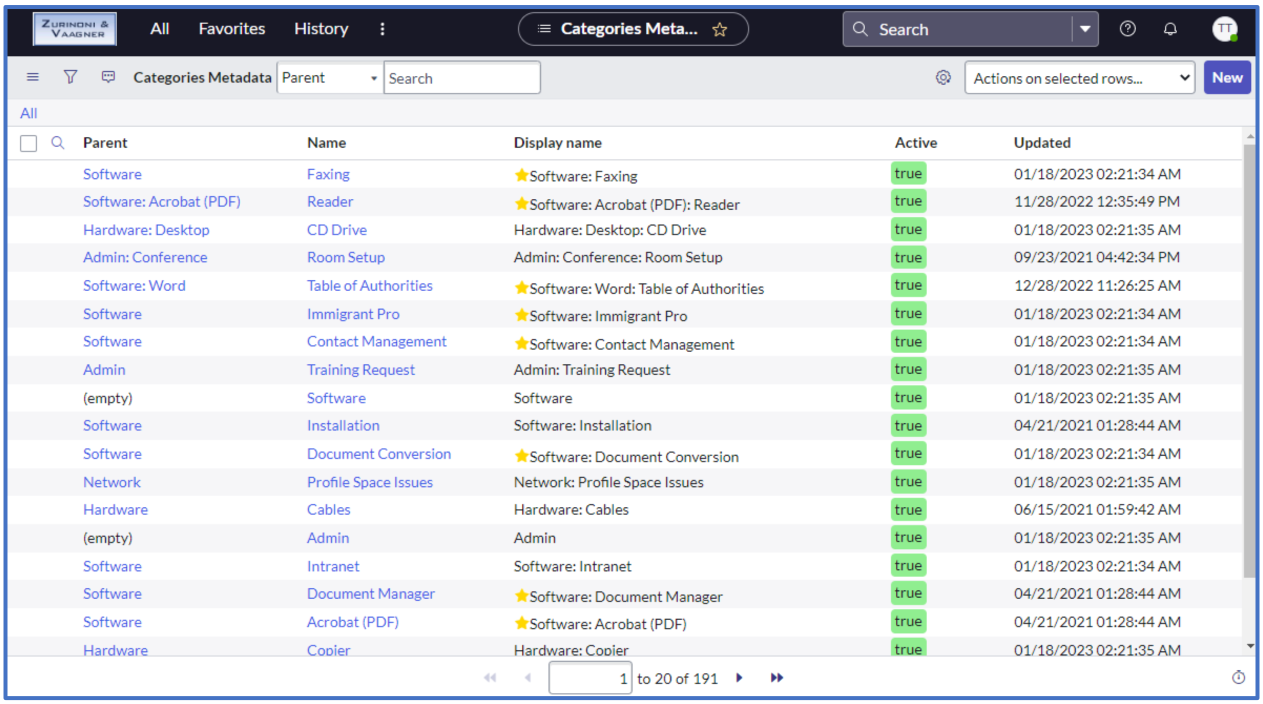
CATEGORY ADMIN

Categories can only be created or modified by users with the Administrator role. Categorization of incidents helps in routing to the appropriate team and can aid in the efficiency of troubleshooting.

Using categories and subcategories also improves the clarity and granularity of report data. An administrator can add additional categories and subcategories along with utilizing them in assignment rules and notifications.

CATEGORIES HOMEPAGE

The categories home page can be found under **All > Category Metadata > All Categories**

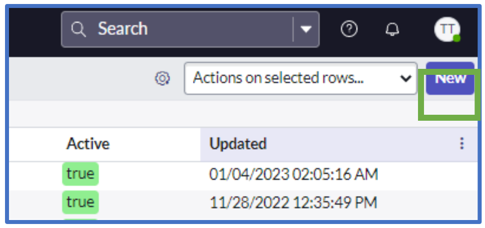


Parent	Name	Display name	Active	Updated
Software	Faxing	Software: Faxing	true	01/18/2023 02:21:34 AM
Software: Acrobat (PDF)	Reader	Software: Acrobat (PDF): Reader	true	11/28/2022 12:35:49 PM
Hardware: Desktop	CD Drive	Hardware: Desktop: CD Drive	true	01/18/2023 02:21:35 AM
Admin: Conference	Room Setup	Admin: Conference: Room Setup	true	09/23/2021 04:42:34 PM
Software: Word	Table of Authorities	Software: Word: Table of Authorities	true	12/28/2022 11:26:25 AM
Software	Immigrant Pro	Software: Immigrant Pro	true	01/18/2023 02:21:34 AM
Software	Contact Management	Software: Contact Management	true	01/18/2023 02:21:34 AM
Admin	Training Request	Admin: Training Request	true	01/18/2023 02:21:35 AM
(empty)	Software	Software	true	01/18/2023 02:21:35 AM
Software	Installation	Software: Installation	true	04/21/2021 01:28:44 AM
Software	Document Conversion	Software: Document Conversion	true	01/18/2023 02:21:34 AM
Network	Profile Space Issues	Network: Profile Space Issues	true	01/18/2023 02:21:35 AM
Hardware	Cables	Hardware: Cables	true	06/15/2021 01:59:42 AM
(empty)	Admin	Admin	true	01/18/2023 02:21:35 AM
Software	Intranet	Software: Intranet	true	01/18/2023 02:21:34 AM
Software	Document Manager	Software: Document Manager	true	04/21/2021 01:28:44 AM
Software	Acrobat (PDF)	Software: Acrobat (PDF)	true	04/21/2021 01:28:44 AM
Hardware	Copier	Hardware: Copier	true	01/18/2023 02:21:35 AM

Parent	Main category
Name	Child category
Display Name	How the category appears in incidents and records
Active	Shows if the category is active or inactive
Updated	Last updated date

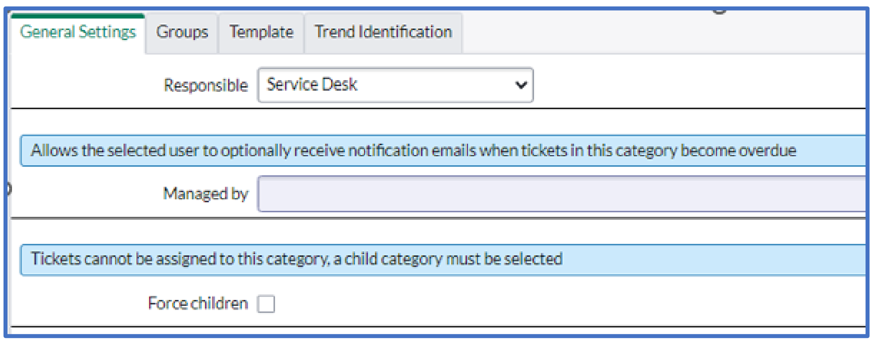
Category Creation

1. Navigate to **All** > **Categories** > **All Categories**
2. Click **New**.



3. Name the category
4. Click **Save**. The new category is added to the **All Categories** list.

General Settings Tab



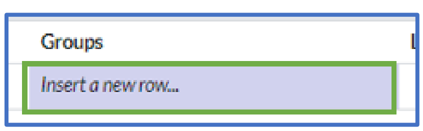
Responsible	Service Desk or Client responsible. Starred Categories are Service Desk responsibility
Managed By	Allows the selected user to optionally receive notification emails when tickets in this category become overdue,
Force Children	Tickets cannot be assigned to this category, a child category must be selected.

Groups Tab

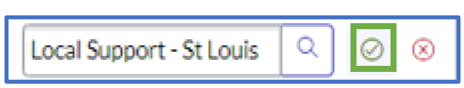
If no groups are selected for this category, the parent category's groups are used. Setting a Suggested Assignment Group overrides the parent category group.

Setting Assignment Groups

1. Double Click **Insert a new row** to bring up the search field.



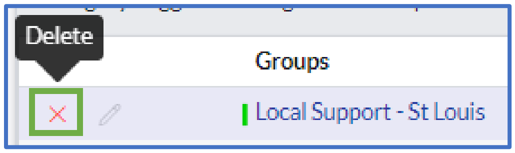
2. Enter the group name or click the **magnifying glass** to bring up a Group list.
3. Click the **green checkmark** or **press enter** to save the entry.



Notes:	The **Active** field changes to **true** upon saving. Assign multiple groups if necessary.

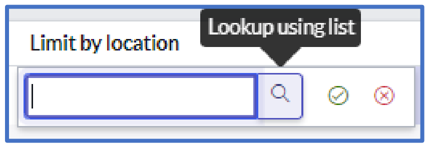
Delete an Assignment Group

Click the **X** to the right of the group name

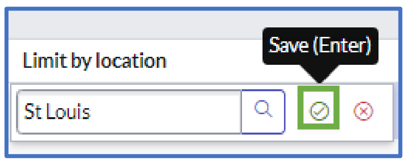


Limit by Location

4. Double click the **Limit by Location** field to bring up the search field.



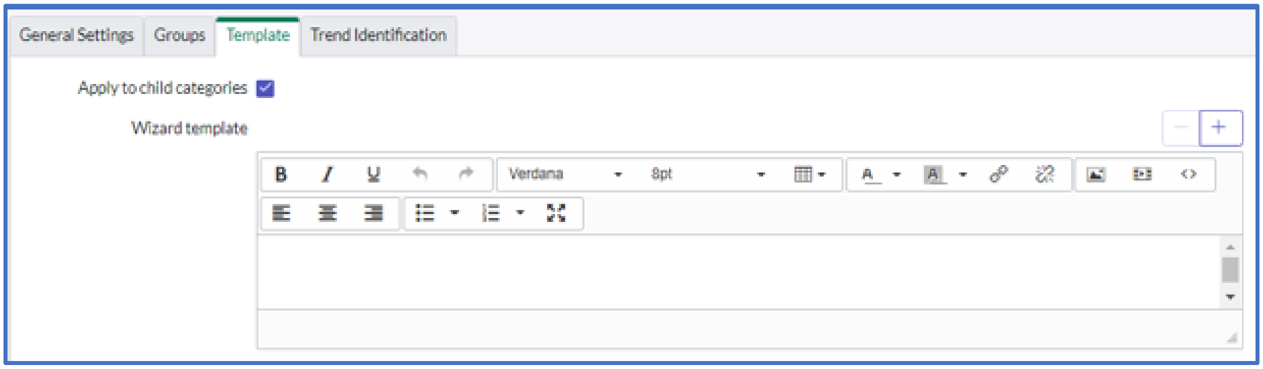
5. Enter the location or click the **magnifying glass** to bring up a list. Click the checkmark or press enter to save.



6. Set **All locations** to **False.** Click the checkmark or press enter to save.

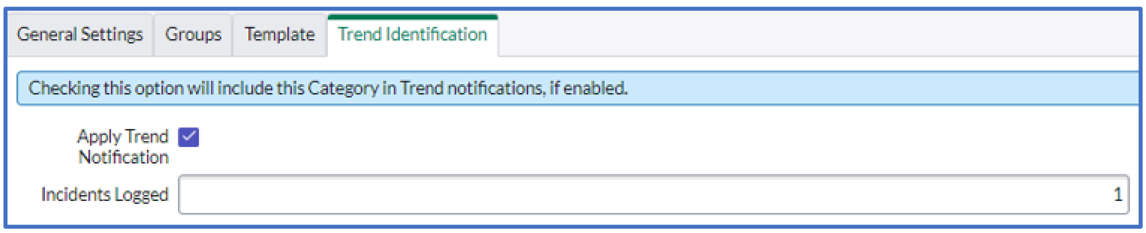
TEMPLATES TAB

Wizard templates appear in incidents and contain notes about the selected category, questions for the analyst, or can contain possible solutions.



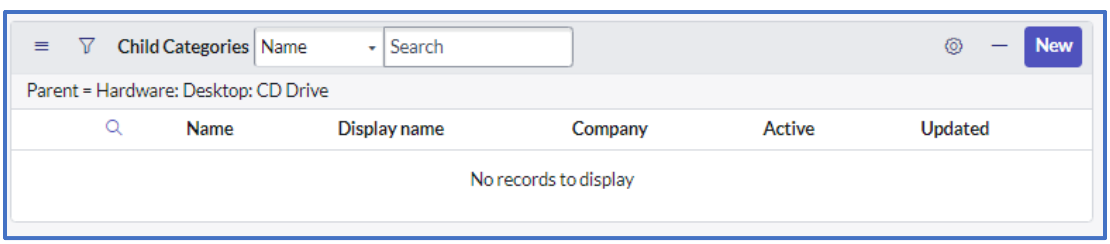
TREND IDENTIFICATION TAB

Trends can detect possible outages. Check **Apply Trend Notification** to enable email notifications to be sent to the user selected in **Managed By** field on General Settings tab.



CREATING A CHILD CATEGORY

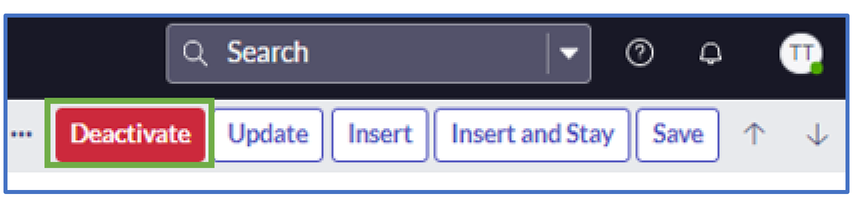
At the bottom of the Category Metadata Window in the **Child Categories** section, click **New**.



A new Category Metadata window loads.

DEACTIVATE A CATEGORY

1. Click the **Deactivate** button in the top right



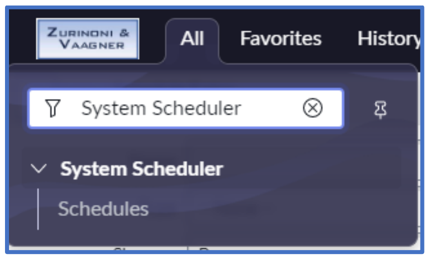
Schedules

Schedules are rules that include or exclude time on a calendar for various actions or tasks. They are used by service levels, inactivity monitor, and group on-call rotation.

Examples

- Schedules can be defined to restrict service levels to only apply to weekdays during business hours. If a service level agreement is set to an 8-5 Weekdays schedule, the SLA only counts time during those hours.
- Schedules can also be excluded from holidays in an on-call rotation.

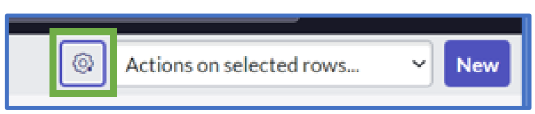
Create, modify, and view schedules in the **System Scheduler** > **Schedules** menu.



Schedule Terms & Options	Definitions
Default schedules	Default schedules are available in a base system and cannot be modified.
Holidays	Define each individual holiday as a schedule entry to create exceptions to existing schedules.
Holidays for multiple regions	Create holiday schedules for multiple regions that follow the same work schedule but have different holidays.
Parent and child schedules	Schedules can have one of two parent-child relationships with other schedules.
Define a schedule	Configure schedules using schedule and schedule entry records.
Schedule for the fifth instance of a week date	Select a date that computes to the fifth instance of a weekday for a date near the end of a month for a repeating monthly schedule,
Repeat a monthly schedule	Repeat a monthly schedule to reduce the amount of time required to define schedules and to provide consistency in scheduling.
Using schedules and calendars	Specific applications within the Now Platform generate graphical calendar displays based on schedule pages.
Schedule Domains	Default schedules appear under the **Global** domain and custom schedules list the company name as the domain.

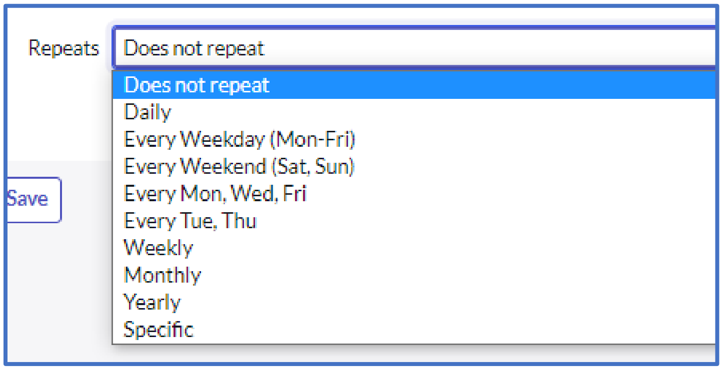
Note

Add the domain column via the gear icon at the top of the list to see if a schedule is global or firm specific.



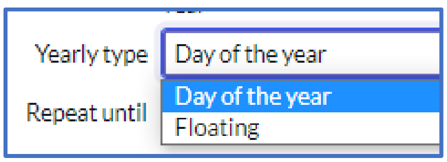
Repeating Schedules

Schedules are set up to repeat daily, weekly, monthly, yearly, every weekday, every weekend, or every other day.



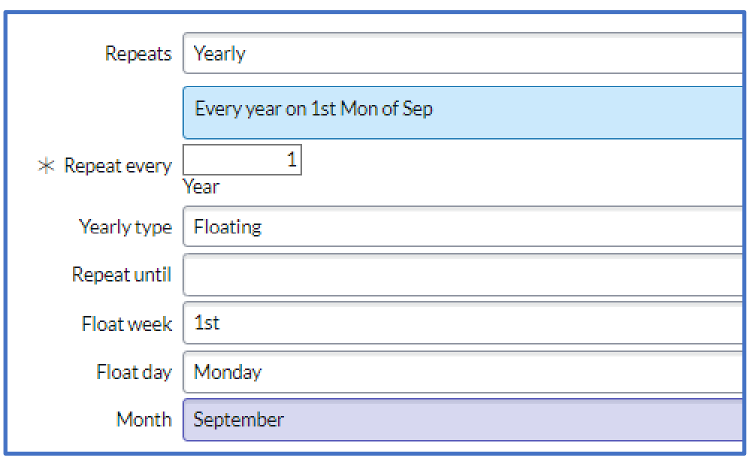
Yearly Repeat

Yearly schedule repeats are set to repeat yearly by date or on a floating schedule.



Yearly Types	
Day of the Year	The holiday falls on the same date each year
Floating	The holiday falls on a specific day of the month. Examples: Labor Day, Thanksgiving, etc.

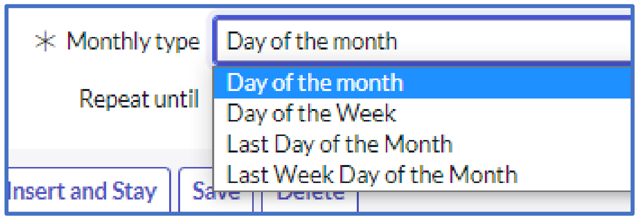
Labor Day Example



IMPORTANT	Holidays falling on a weekend and are observed on the closest weekday need to be manually changed yearly. Example: New Year falls on a Sunday yet is observed the following Monday.

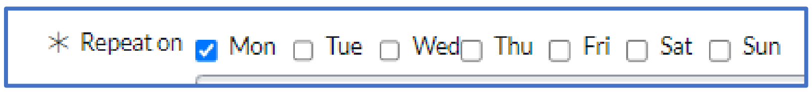
Monthly Repeat

Monthly schedule repeats are set by day of the month, day of the week, last day of the month, or last weekday of the month



Weekly Repeat

Weekly schedule repeats are set to repeat on specific days of the week



Parent and Child Schedules

Parent Field

When a schedule record lists a value for the Parent field, schedule entries from the parent schedule apply to both the parent schedule and the child schedule. By default, there are no sample schedules that use the Parent field.

Child Schedule

When a schedule record has one or more child schedules in the Child Schedules related list, schedule entries from the child schedule apply to the containing schedule. By default, there are several sample schedules that use child schedules.

- For example, see the 8-5 weekdays excluding holidays schedule that includes the U.S. Holidays schedule.

Parent and child schedules cannot contain conflicting schedule entry types.

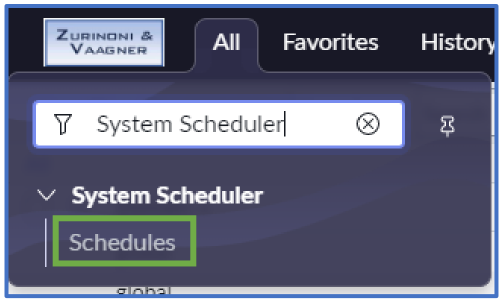
- For example, a schedule containing maintenance schedule entries cannot also contain blackout schedule entries. Nor can a maintenance schedule have a child schedule containing blackout schedule entries.

IMPORTANT	To create a Holiday schedule and include it in a parent schedule, it must be added as a child schedule and with an Include type.
	Parent schedules must have at least one entry that is not an Excluded type. If parent schedules are only exclusionary, they are invalid.

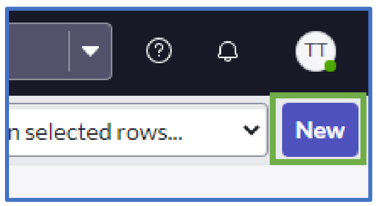
Note	The **Show Schedule** related link shows schedule entries from the current schedule and the child schedule record. For example, when showing the 8-5 weekdays excluding holidays schedule, holidays are also shown as excluded because the holiday schedule is a child schedule.

Create a Schedule

1. Navigate to **All** > **System Scheduler** > **Schedules**

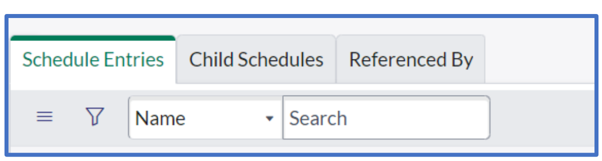


2. Click **New**



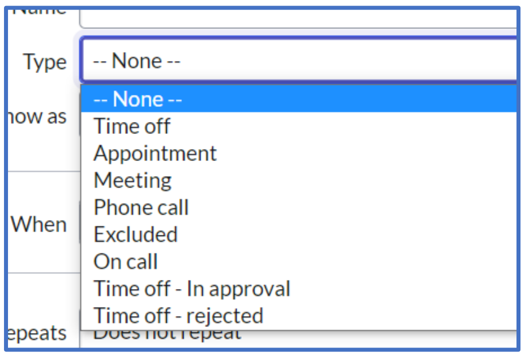
3. Complete the following fields

   a. Name the Schedule
   b. Choose a specific time zone or choose floating
      Floating – The time zone is relative to the Incident or Change Request for clients who operate out of different time zones
   c. [Optional] Enter a user defined type
   d. [Optional] Enter a description
4. Click **Save**.
   The **Schedule Entries**, **Child Schedules**, and **Referenced by** tabs appear at the bottom of the record.

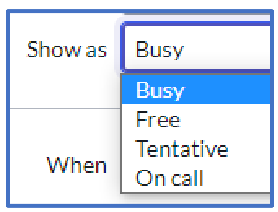


5. In the **Schedule Entries** tab, click **New**

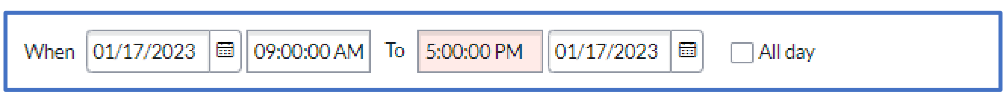
6. Name the Schedule
   a. Select a **Type**



   b. Select a **Show as** type



   c. In the **When** fields, enter the dates and times, or check the box for **All day** if applicable.



   d. Select an option in the **Repeats** field
7. [**Optional**] To set an expiration date for the schedule, enter a date into the **Repeat until** field
8. **[Optional]** Attach a child schedule via the **Edit** or **New** buttons in the **Child Schedules** tab
9. Click **Save**

On-Call Admin

This section provides tasks-based steps to create (define) an Emergency On-Call Schedule in ServiceNow for incidents set to Emergency priority outside of normal business hours.

New On-Call Schedules must be defined for each Assignment Group used in the On-Call Alerts.

Terms

Terms	Definition
Assignment Group	A group that contains emergency, on-call members.
Member	A member (user) is an emergency, on-call technician.
System Scheduler	This application is used to create Schedule Templates for Holiday Schedules.
On-Call Scheduling	This application is used to create Emergency On-Call Schedules based on a simple schedule or schedule created in System Scheduler.
On-Call Shift	A shift is the time during which the members of a roster are on-call. Each Assignment Group can have their own shifts.
On-Call Roster	A roster is a set of members that are on-call for a shift. The members of any roster are contacted in the order that is defined by the escalation policy.

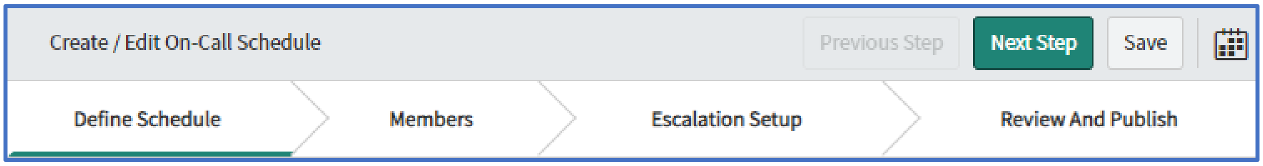
High Level Tasks

	Prerequisite Tasks
1	Create or Identify Assignment Group • Groups by Location and Departments • Add Members
2	Assign Group to Suggested Assignment Groups in Categories
3	If needed, create Holiday Schedule Template

	Final Tasks
4	Create Emergency On-Call Schedule
5	Set Notification Attempts & Types

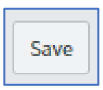
CREATE / EDIT SCHEDULE NAVIGATION

This module steps through 4 main tasks when creating an Emergency On-Call schedule.

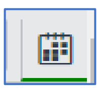


- **Define Schedule**
- **Members**
- **Escalation Setup**
- **Review And Publish**

Use **Previous Step** and **Next Step** buttons to navigate through the tasks.

Click **Save** 

to save a draft version of the Schedule before publishing.

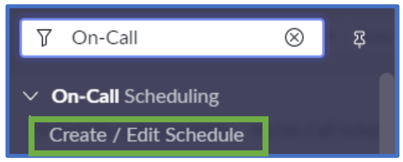
Click **Calendar**  icon to open and close Calendar Preview

SERVICENOW TRAINING VIDEO

[Create On-Call Schedule]

CREATE (DEFINE) EMERGENCY ON-CALL SCHEDULE

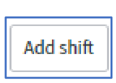
1. Click **All** and type **On-Call** in **Filter Navigator**



2. Click **Create / Edit Schedule**
3. Select appropriate Assignment Group in **Select group** drop down menu
4. Select **New** for **Create Option**
5. Select **No** in **Allow Shift Schedule overlap** drop down menu
6. Enter Shift name in **Name** field (Example: Zurinoni Business Hours On-Call Schedule)
7. Select **Yes** or **No** in **Would you like to use an existing schedule?** drop down menu
   a. Select **Yes** for an existing schedule
   b. Select **No** to bypass selecting an existing schedule

Additional Fields – Existing Schedule	
Schedule	Search for and select existing Schedule.
Start date	Enter the date on which the on-call shift is scheduled to begin.
Specify holidays	Select **Yes** to define holidays for the on-call shift. • Select existing Holiday Schedule or create one using System Scheduler. Select **No** to not specify holidays for the shift.
Additional Fields – Bypass Existing Schedule	
Time zone	Primary time zone for company or group.
Is the shift for this schedule all day?	Specify whether this shift is an all-day shift.
Start	The time of day the shift is scheduled to start. The start and end time represent one shift. The date is different only if the shift spans midnight.
End	The time of day the shift is scheduled to end. The start and end time represent one shift. The date is different only if the shift spans midnight.
Repeats	The days that the shift repeats. Example: Monday to Friday
Specify holidays	Select **Yes** to define holidays for the on-call shift. • Select existing Holiday Schedule or create one using System Scheduler. Select **No** to not specify holidays for the shift.
Reminder Communication Fields	
Send on-call reminders	Option to send on-call, email reminders to members of the roster.
Reminder lead time (days)	Lead time for email reminders. (Number of days prior to start of schedule)
Calendar Subscription Fields	
Coverage interval	Interval for updates of coverage details. Specifies whether to update the subscribed calendar with weekly or daily coverage details.
Get coverage for	Number of weeks or days to update the subscribed calendar.

8. Click **Add shift** or click **Next Step** to add members



or


Add/Remove Members to On-Call Schedule

1. Search for and select member (user) in **Available**
2. Click **Add**

Notes:	For members to list in **Available**, they must be added to the User Group selected when defining a new Emergency On-Call Schedule.
	Click **Remove** to remove a selected member from **Selected**.
	The Roster name default to the word Primary. Click **Pencil** icon to edit. 

Additional Fields	
Rotation start date	Date rotation starts.
Rotation interval	Type of the rotation interval. (Daily or Weekly)
Rotate every	Frequency of the rotation interval.
Day of week for rotation	Day of the week on which the roster rotation starts. When this field is specified, roster rotation happens based on the specified frequency and the day of the week.
Send on-call reminders	If selected, on-call reminders are sent to the members of the roster.
Reminder lead time (days)	Lead time for email reminders. (Number of days prior to start of schedule)

3. Click **Add Roster** or click **Next Step** for escalation setup

or


Escalation Setup

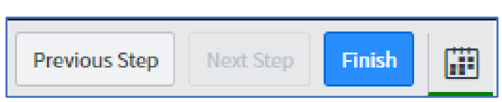
1. Select notification type in **Catch-all** drop down menu

Catch-all Types	
Notify Group Manager	Select to notify group manager.
Notify Individual	Select to specify a member of the group to notify.
Notify All	Select to specify a shift. All shift members are notified.

2. Click **Edit reminder** to change reminder intervals or add additional reminders
3. Review **Escalation Path (Preview)**
4. Click **Next Step** to review and publish

Review And Publish

1. Review settings
2. Click **Finish**



On-Call Schedule Notification Attempts and Types

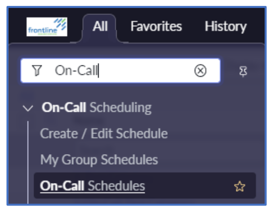
After creating a new Emergency On-Call Schedule, set notification attempts and types.

If the first on-call technician needs to be notified multiple times, multiple contact attempts must be set. For example, if the first on-call technician needs to be notified 3 times before contacting the next on-call technician in the Roster, 3 contact attempts must be set.

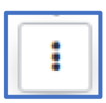
Note:	If these steps are not taken for a newly created Emergency On-Call Schedule, only a phone call is made to the mobile phone number in the member's profile.

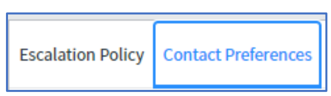
Set Notification Attempts and Types

1. Click **All** and type **On-Call** in **Filter Navigator**

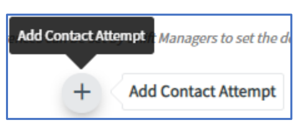


2. Click **On-Call Schedules**
3. Select desired On-Call Schedule
4. Click **Shifts** tab

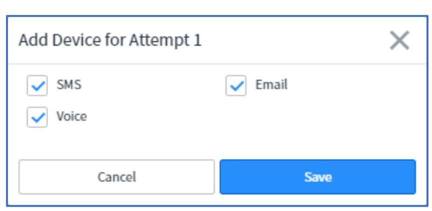
5. Click **Actions** 
6. Select **Edit Escalation and Contact Preferences**
7. Click **Contact Preferences** tab



8. Click **Add Contact Attempt**



9. Select any or all notification types (SMS, Voice, Email)



10. Click **Save**

Notification Type Examples

There are 3 types of notifications sent to on-call technicians when the on-call alert is started in ServiceNow. Each provide the option to accept or reject the assignment. The emergency incident assigns to the technician that accepts.

Phone Number that sends calls and texts: +14046206997

Phone

> Hello. This is the Frontline Service Desk calling with an emergency escalation regarding incident: INC#. The Requester is %Requester Name% and the summary is %Summary of Incident%. Hello. This is the Frontline Service Desk calling with an emergency escalation regarding incident: INC#. The Requester is %Requester Name% and the summary is %Summary of Incident%. Press 1 to accept and assign to yourself. Press 2 to reject the assignment.

Text

> This is the Frontline Service Desk notifying you of an Emergency Escalation for INC# %, Requester %, Summary Of Incident%. Reply ACC to take ownership of the ticket or REJ to reject and we will contact the next person in the escalation path. If you need to reach us please call 404-591-7731.

Email

> Subject: INC# On-Call Alert has been assigned to %Group%
> Body:
> INC# has been escalated to %Group%
>
> To assign yourself to the Incident, reply to this email with 'ACC' in the message body.
> To reject and move the Incident to the next person in the escalation path, reply to this email with 'REJ'
>
> Summary: %Summary%
> Priority: 1 - Emergency
> Requester Name: %Requester Name%
> Requester Phone: %Requester Phone Number%
> Requester Email: %Requester Email%
> Requester Location: %Requester Location%
> Category: %Category%
> Created: MM/DD/YYYY HH:MM:SS AM EDT
>
> Work notes:
>
> This message is an automated notification from the Incident referenced above. We're happy to help you with any questions about this Incident; please contact us via hdnotify@frontlinems.com, or call us 24/7 at 1-800-870-4682 or +1 404-591-7731.

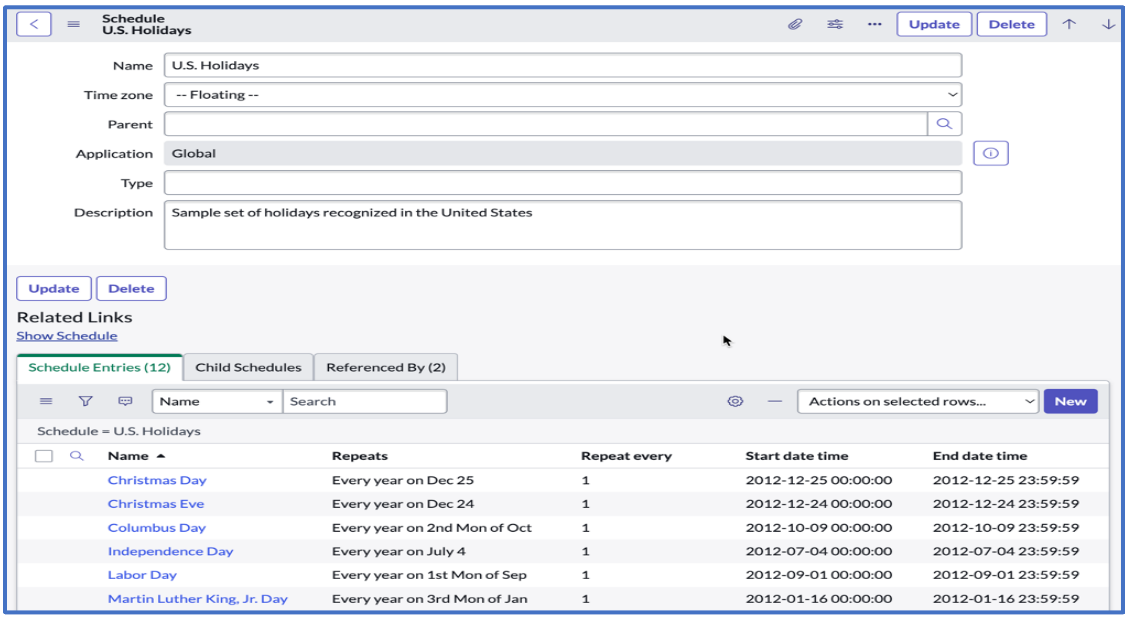
SCHEDULE TEMPLATES & HOLIDAY SCHEDULES

Use the System Scheduler application to create Schedule Templates for Holiday Schedules. These templates are selectable from the On-Call Scheduling application.

Each holiday can be defined as a Schedule Entry to create exceptions to existing schedules.

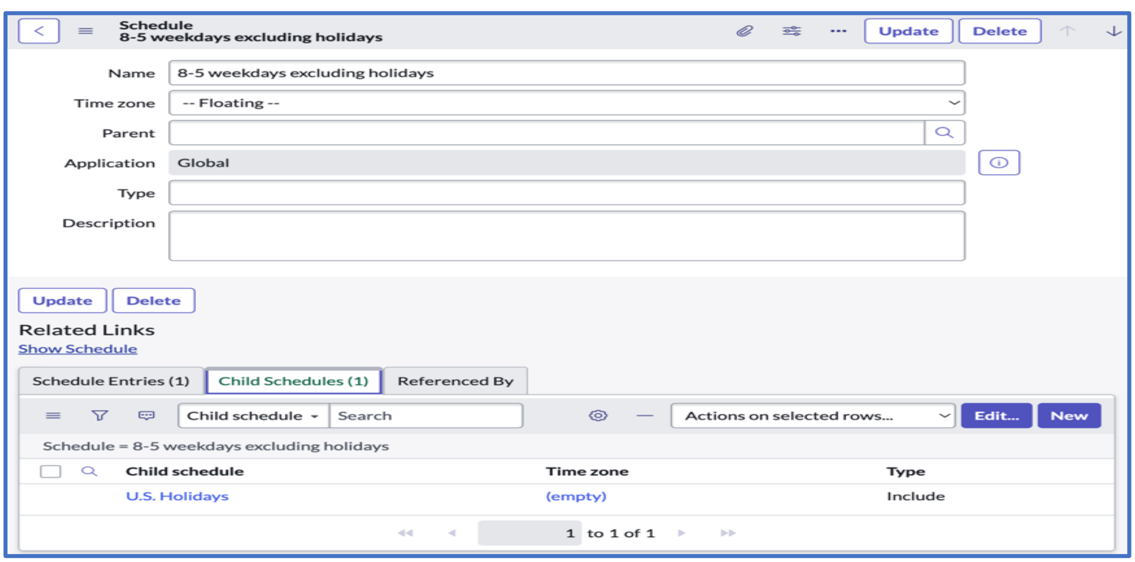
Schedules can be included in other schedules through a parent-child relationship. It is possible to create a Holiday Schedule and include it in other Schedules to keep holidays consistent.

HOLIDAY SCHEDULE EXAMPLE



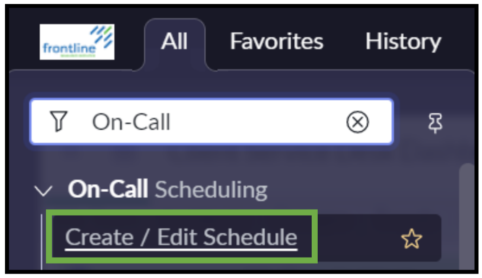
CHILD SCHEDULE EXAMPLE

The following example shows a Schedule that includes the preceding Holiday Schedule.



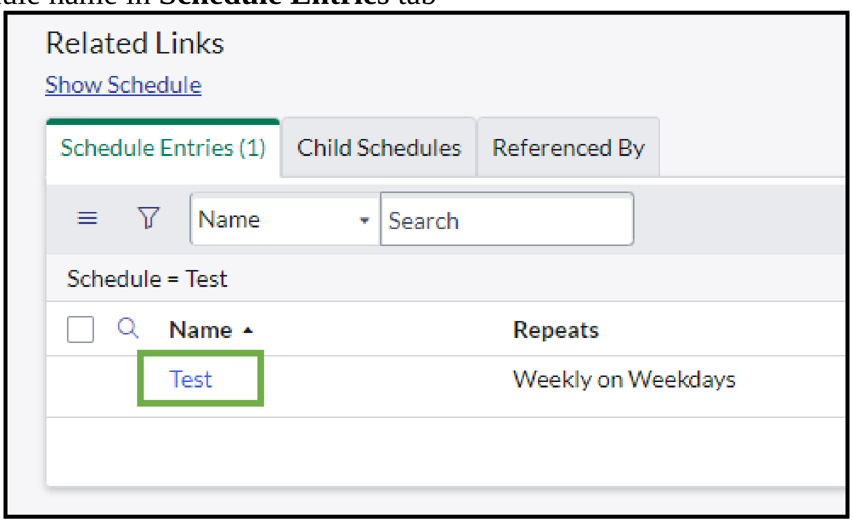
Edit On-Call Schedule

1. Click **All** and type **On-Call** in **Filter Navigator**
2. Click **Create / Edit Schedule**



3. Select appropriate Assignment Group in **Select group** drop down menu
4. Click **This schedule can be edited from form** to edit dates and times

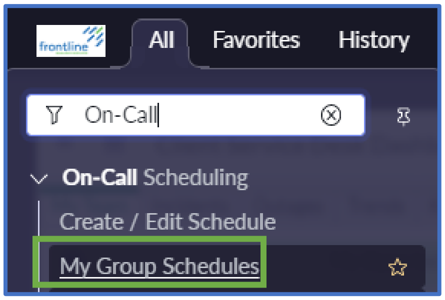
5. Click schedule name in **Schedule Entries** tab



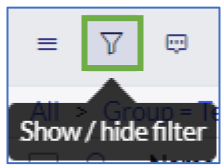
6. Make desired changes, then click **Update**
7. Navigate back to **Create / Edit Schedule** window and make any other desired changes
8. Click **Save**

Delete On-Call Schedule

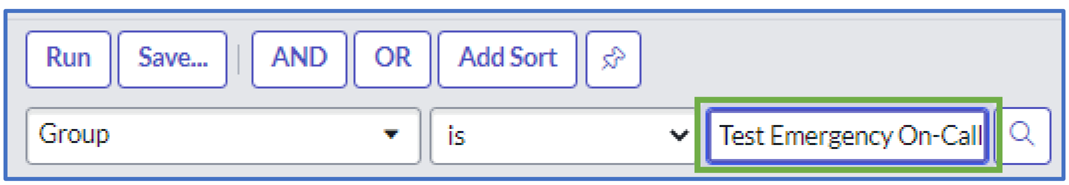
1. Click **All** and type **On-Call** in **Filter Navigator**



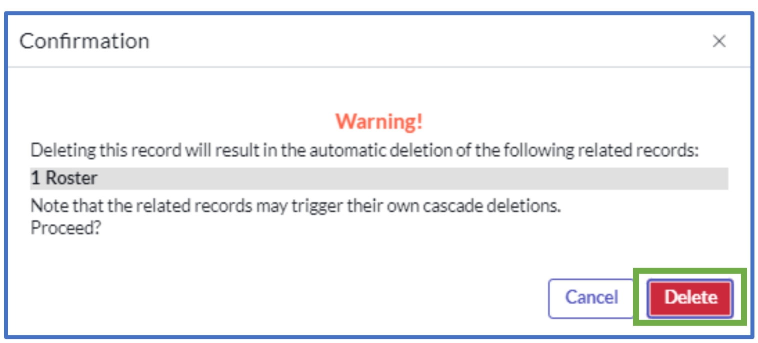
2. Click **My Group Schedules**
3. Click **Show / hide filter**



4. Enter On-Call Schedule's name in Group input field



5. Click **Run**
6. Click Schedule's name to open
7. Click **Delete**
8. Click **Delete** again to confirm deletion

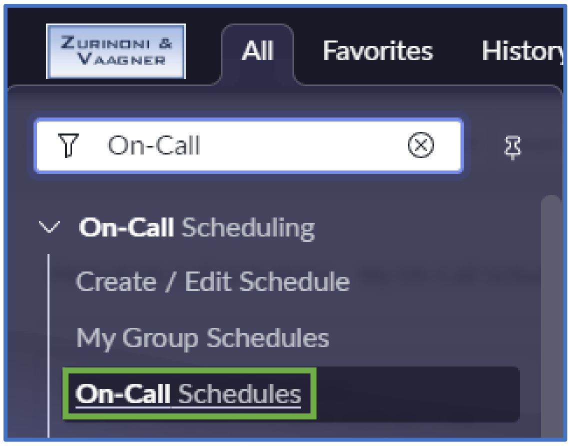


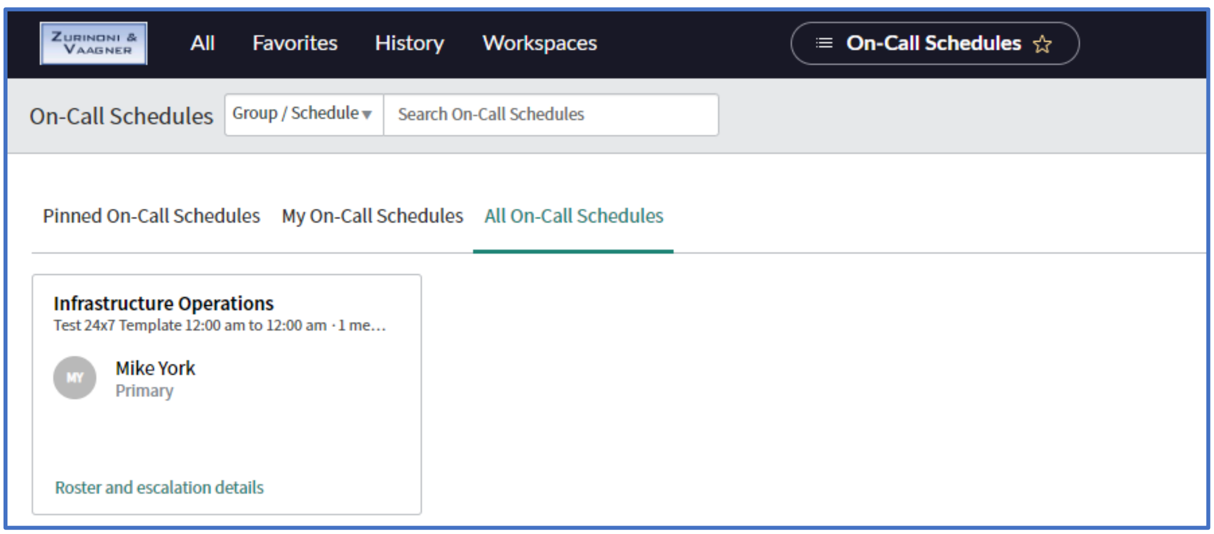
Note:	This may leave residual schedules behind, check System Scheduler > Schedules for orphaned schedules.

ON CALL SCHEDULES

Use On-Call schedules to view and modify active emergency On-Call schedules.

Navigate to **All** > **On-Call Scheduling** > **On-Call Schedules**

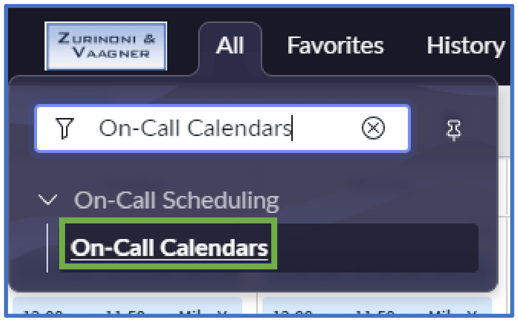




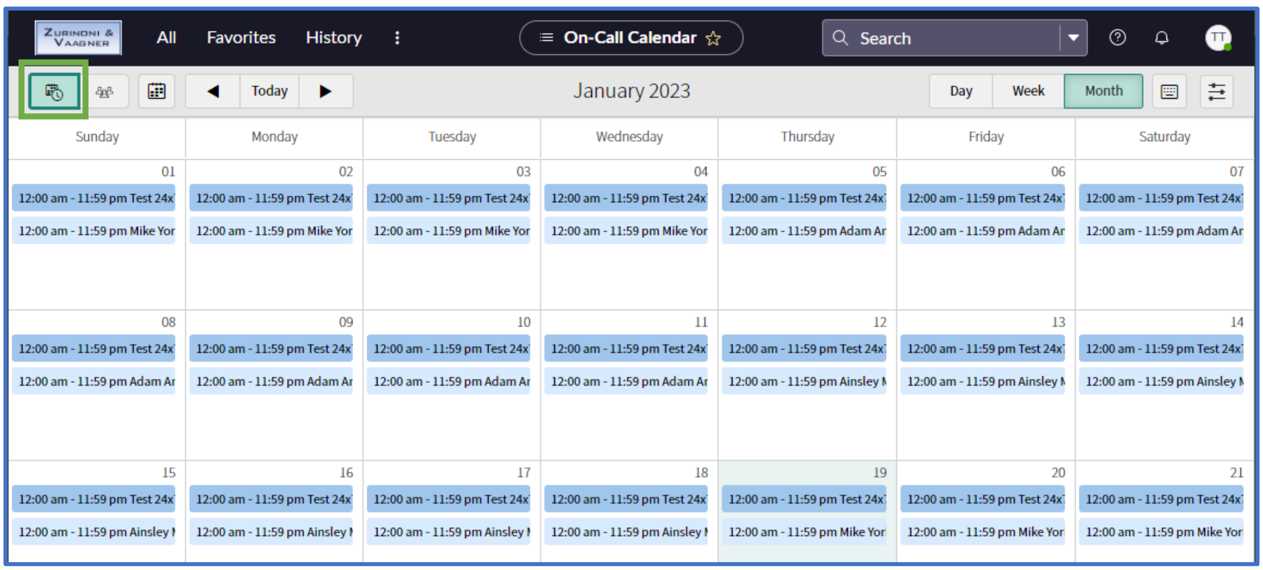
ON-CALL CALENDARS

View all active Emergency On-Call schedules in a calendar view.

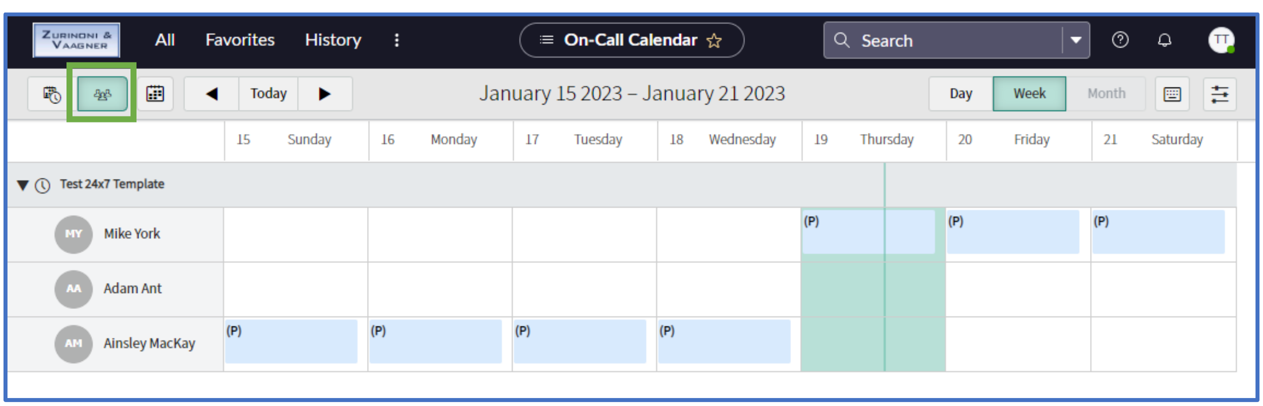
Navigate to **All** > **On-Call Scheduling** > **On-Call Calendars**



ON-CALL CALENDAR VIEW



ON-CALL CALENDAR TIMELINE VIEW



SLA Management

By default, there are 2 targets measured by SLA (Service Level Agreement) in ServiceNow.

Target Type	Definition
Resolution Target	Measures how long it takes to resolve (not close) an incident from when it was initially created. Targets can vary depending on the type of incident priority.
Response Target	Measures how long it takes for a client analyst to take ownership of an incident assigned to their assignment group in ServiceNow.

SLA runs on any table that extends from the Task table in ServiceNow. The Task table is the top-level table.

- Examples of tables that extend from the Task table are Incidents, Changes, Problems, and Service Catalogs.

For incidents, there are 4 priorities, and it is common to have SLA definitions for each priority.

Priority Level	Priority Name
1	Emergency
2	High
3	Medium
4	Low

Based off the 4 incident priorities, clients have 4 standard Resolution SLA definitions and 4 standard Response SLA definitions by default.

IMPORTANT:	SLA definitions automatically default to the **Default SLA flow**. This flow sends an email notification to the analyst in the incident Assigned To field along with their manager at 75% and 100%. If no analyst in Assigned To field, notifications are sent to the assignment group using the same intervals.

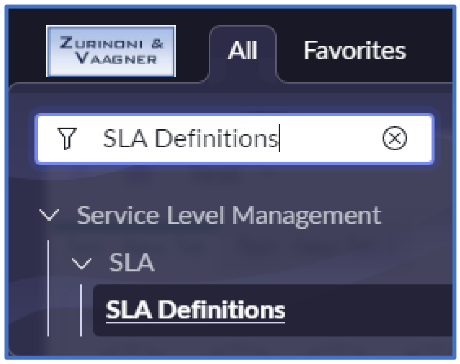
Additional ServiceNow Resources

Topic	ServiceNow URL
SLA Definitions	https://docs.servicenow.com/bundle/sandiego-it-service-management/page/product/service-level-management/concept/c_SLADefinitions.html
SLA Conditions	https://docs.servicenow.com/bundle/sandiego-it-service-management/page/product/service-level-management/concept/c_SLADefinitions.html

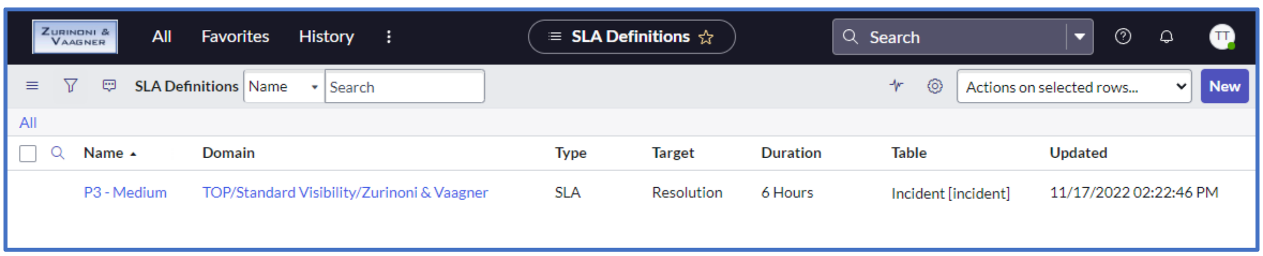
SLA Definitions

This module is used to create and modify SLA's in ServiceNow.

1. Click **All** tab
2. Search for **SLA Definitions** in **Filter** field
3. Select **SLA Definitions**

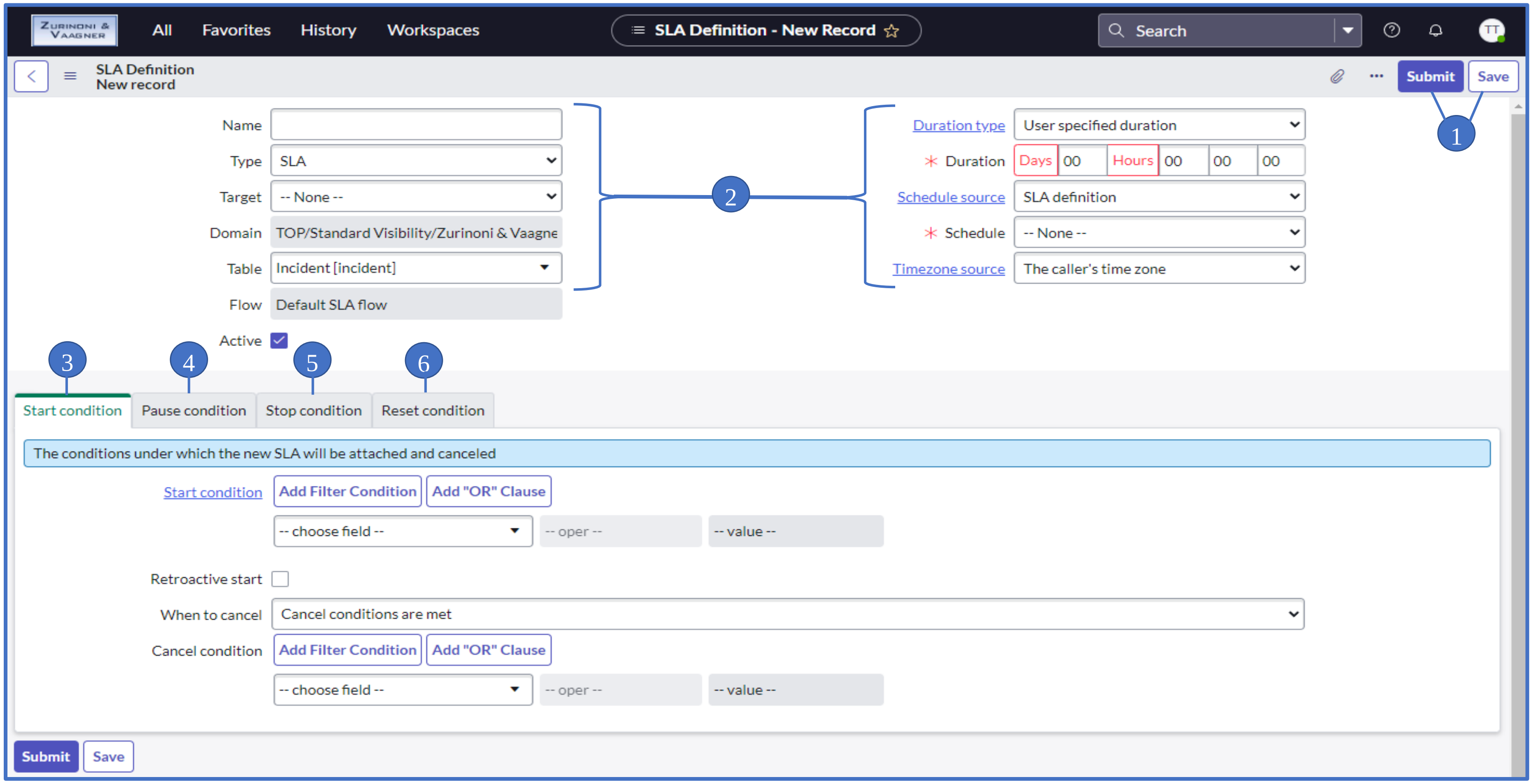


The list view window for SLA Definitions displays in ServiceNow.



Note:	Definitions assigned to global domain cannot be edited.

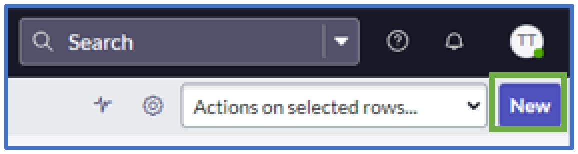
SLA Definition Window Diagram



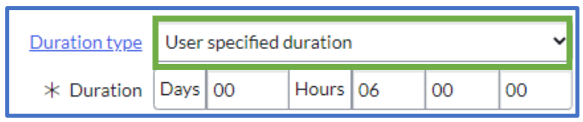
1	**Submit & Save**	Click **Submit** to save and return to previous window **OR** click **Save** and remain on current window.
2	**Top-Level Fields**	SLA definition fields located above condition tabs.
3	**Start Condition Tab**	The condition(s) met for SLA to start and for SLA to cancel.
4	**Pause Condition Tab**	The condition(s) met for SLA to pause (stop increasing elapsed time) and for SLA to resume.
5	**Stop Condition Tab**	The condition(s) met for SLA to stop (complete).
6	**Reset Condition Tab**	The condition(s) met for SLA to cancel or complete and a new SLA is started.

CREATE SLA DEFINITION

1. From **SLA Definitions** list view, click **New**

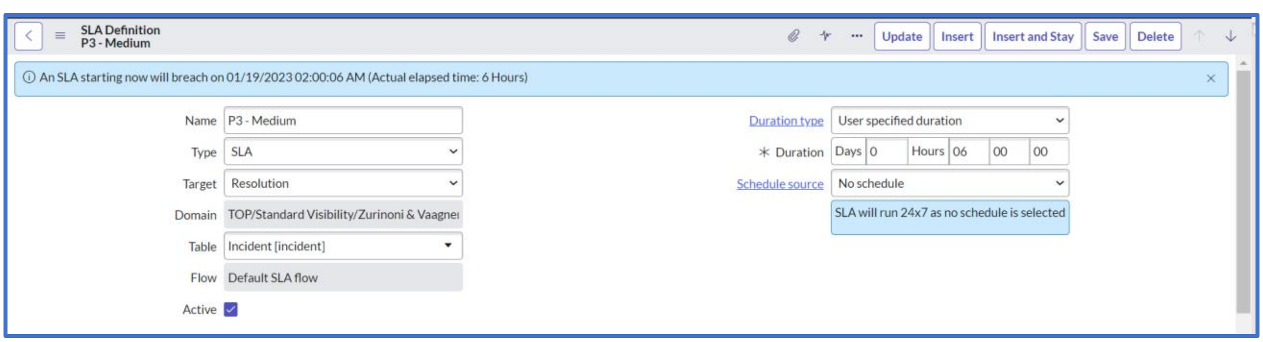


2. Complete the following top-level fields

<table>
<tr><th>Field</th><th colspan="2">Description</th></tr>
<tr><td>Name</td><td colspan="2">This field contains the SLA definition name.</td></tr>
<tr><td>Type</td><td colspan="2">This field is used to categorize what is tracked.
Example: SLA</td></tr>
<tr><td>Target</td><td colspan="2">Response or Resolution</td></tr>
<tr><td>Table</td><td colspan="2">Select from available tables
Example: Incident [incident]</td></tr>
<tr><td>Duration Type</td><td colspan="2">Select User specified duration and enter duration in Duration field

OR
Select one of the other prescribed durations</td></tr>
<tr><td rowspan="3">Schedule Source</td><td>SLA definition</td><td>Select this option to choose from available schedules. If desired schedule is not present, it may need to be created.</td></tr>
<tr><td>Incident field</td><td>Select this option to choose a specific field in the incident table.
Examples: Due date or Follow-up date fields</td></tr>
<tr><td>Note:</td><td>SLA runs 24x7 if no schedule is selected.</td></tr>
<tr><td>Timezone Source</td><td colspan="2">Select time zone source to be used</td></tr>
<tr><td>IMPORTANT:</td><td colspan="2">The Flow field automatically defaults to Default SLA flow.
This flow sends an email notification to the analyst in the incident Assigned To field along with their manager at 75% and 100%.
If no analyst in Assigned To field, notifications are sent to the assignment group using the same intervals.</td></tr>
</table>

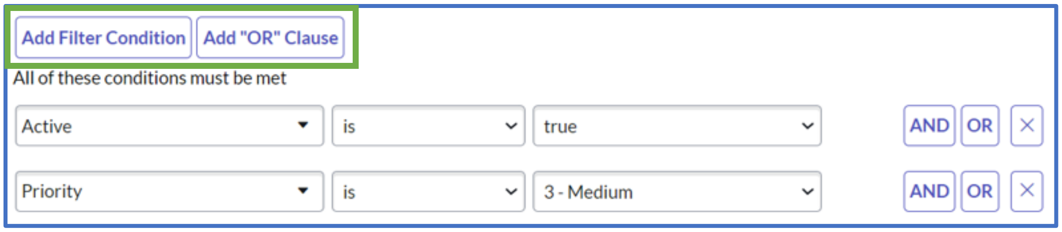
3. Click **Save**

Example for Medium Priority Incident - Resolution Target SLA



4. Click **Start condition** tab to set SLA start condition(s)
   a. Choose field, operator, & value

   b. Click **Add Filter Condition** or **Add "OR" Clause** to add additional conditions

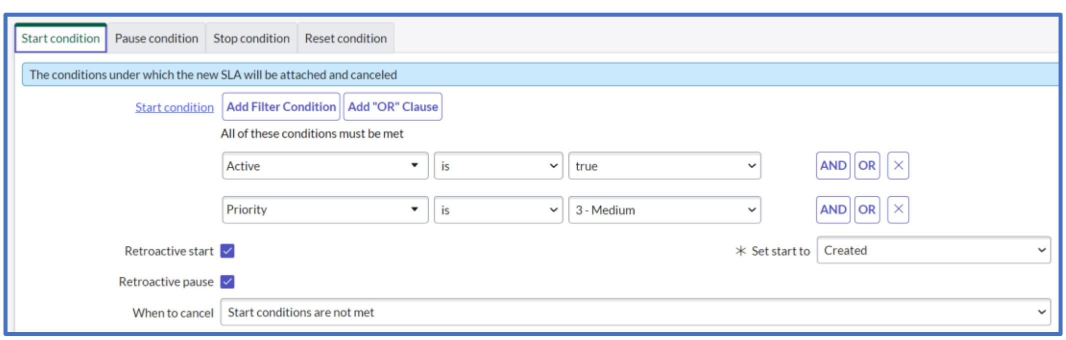


Note:	Click **Delete** button to remove condition 

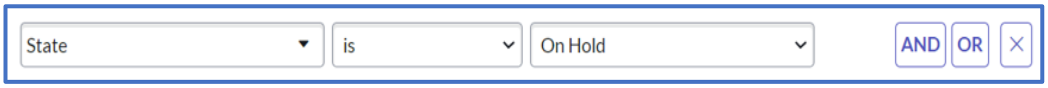
   c. Complete additional checkboxes & fields on tab

Checkbox / Field	Description	
Retroactive Start	Enable checkbox to choose a date and time field for SLA start time. After enabling this checkbox, the **Set start to** field and **Retroactive Pause** checkbox appear.	
Retroactive Pause	Select to enable calculation of retroactive pause time if Pause condition is met	
	Note:	This checkbox is available when the **Duration type** field is set to **User specified duration**.
Set start to	Select date and time field Example: Select **Created** to start SLA when incident is created	
When to cancel	Select from available options • Start conditions are not met • Cancel conditions are met • Never	

Example for Medium Priority Incident - Resolution Target SLA

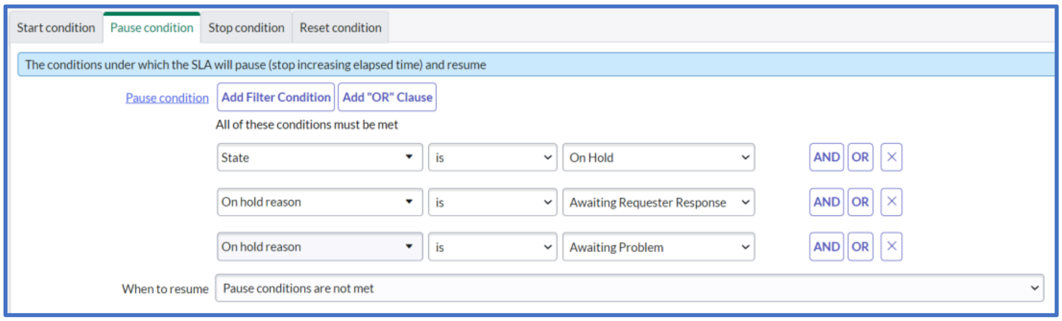


5. Click **Pause condition** tab to set SLA pause condition(s)
   a. Choose field, operator, & value



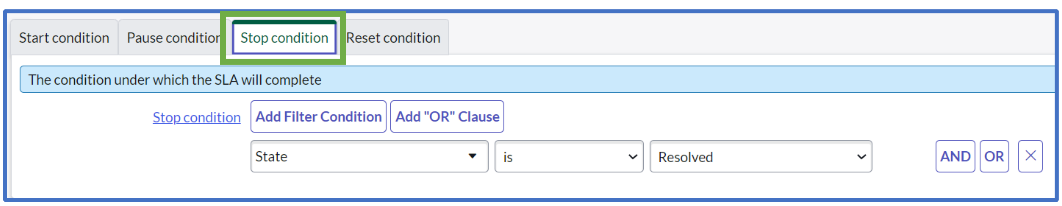
   b. Click **Add Filter Condition** or **Add "OR" Clause** to add additional conditions
   c. Select **Pause conditions are not met** or **Resume conditions are met** in **When to resume** field

Example for Medium Priority Incident – Resolution Target SLA



6. Click **Stop condition** tab to set SLA stop condition(s)
   a. Choose field, operator, & value
   b. Click **Add Filter Condition** or **Add "OR" Clause** to add additional conditions

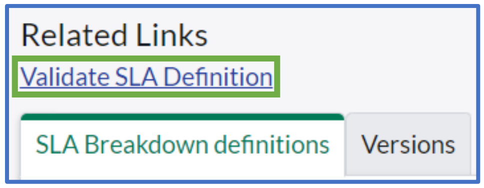
Example for Medium Priority Incident – Resolution Target SLA



7. If needed, click **Reset condition** tab to set SLA reset condition(s)
   a. Choose field, operator, & value
   b. Click **Add Filter Condition** or **Add "OR" Clause** to add additional conditions
   c. Select **Cancel existing Task SLA** or **Complete existing Task SLA** in **Reset action** field
8. Click **Save**

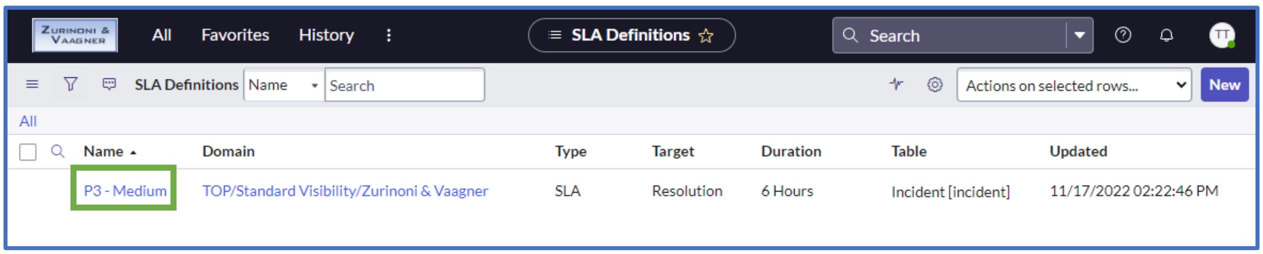
Validate SLA Definition

Within SLA definition window, click **Validate SLA Definition** link under **Related Links** to test the SLA definition on an incident.



Modify SLA Definition

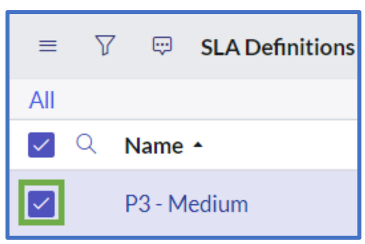
1. Click definition's name in SLA Definitions list view



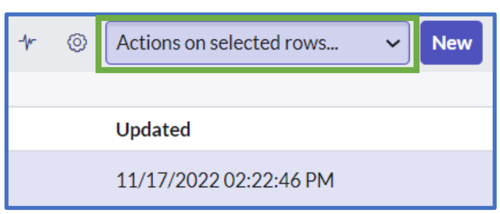
2. Make desired modifications
3. Click **Save**

Delete SLA Definition

1. Enable checkbox next to definition's name in SLA Definitions list view



2. Click **Actions on selected rows…** drop down

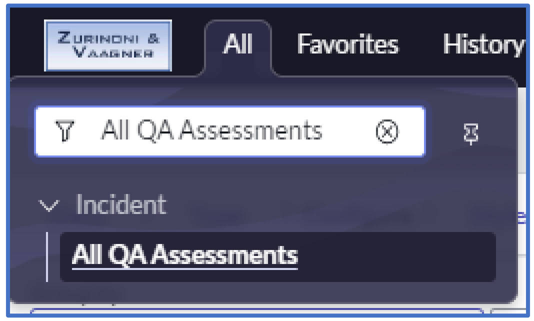


3. Select **Delete**

QA ASSESSMENTS

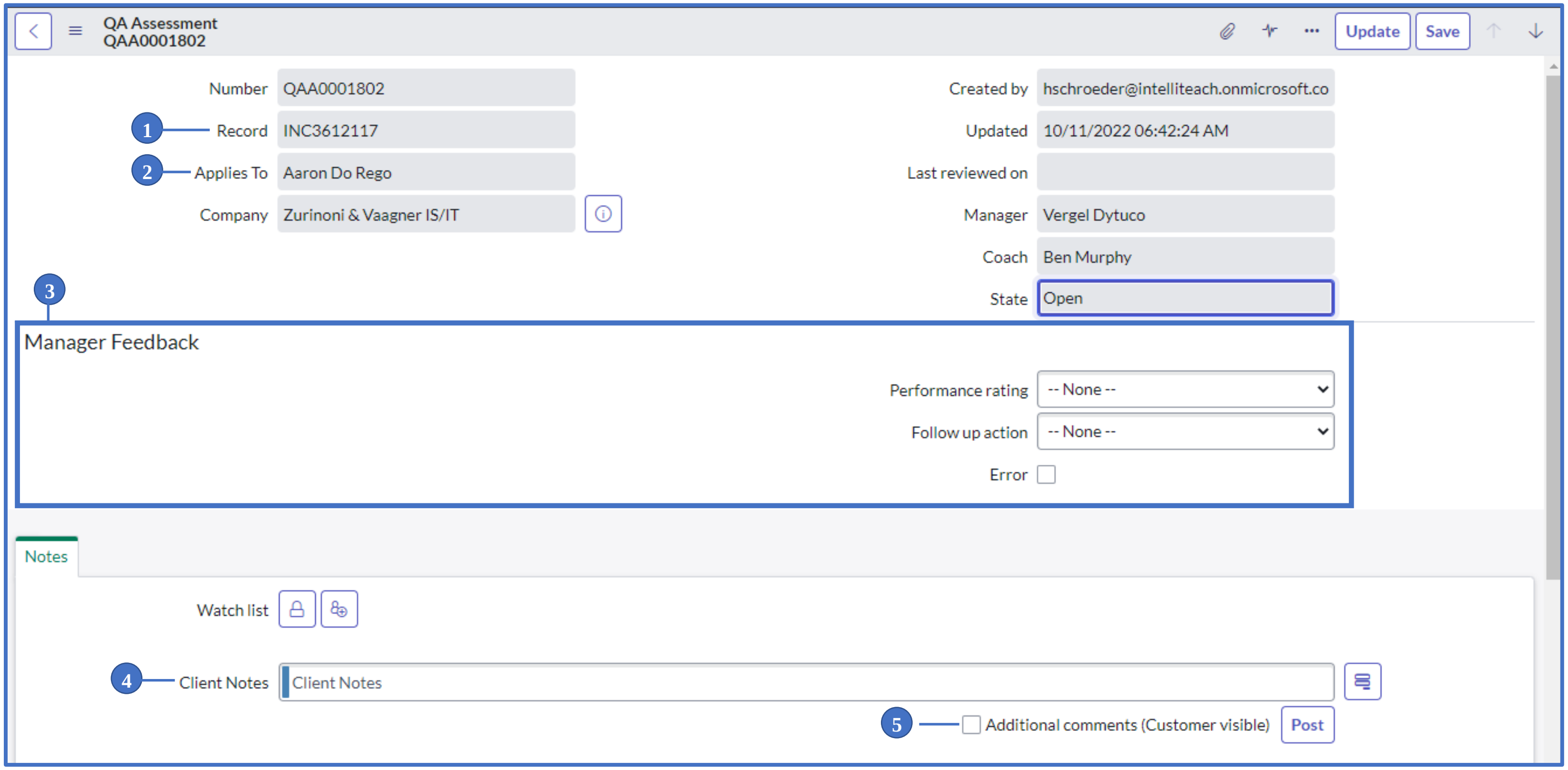
QA Assessments are used for quality assurance on open and closed Incidents.

A full list of QA assessments can be found by going to **All** > **Incident** > **All QA Assessments.**



Note:	When using the **New** button to create QA Assessments, the Incident number needs to be manually assigned.

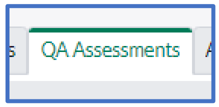
QA Assessment Window Diagram



1	**Record**	The incident associated with the QA
2	**Applies to**	The analyst the QA is directed towards
3	**Manager Feedback**	Performance ratings, follow up actions, and error categories
4	**Notes**	Notes explaining the reason for the QA
5	**Additional Comments**	Check this box to make notes visible to Frontline analysts. Leave unchecked to make notes only visible to client and system administrators

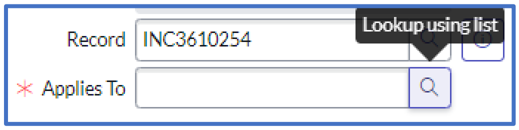
Create a QA Assessment

1. At the bottom of the Incident window, click the **QA Assessments** tab



2. Click **New** 

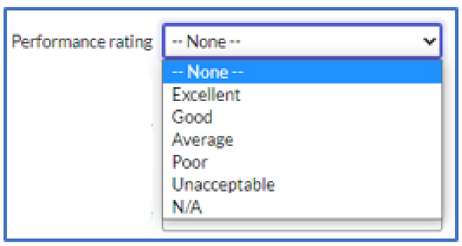
. The record field automatically populates with the Incident Number.
3. In the **Applies to** field, type the analyst's name or click **Lookup using list** for a searchable list.

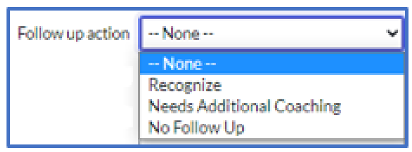


4. Enter comments into the **Notes** field.
5. Click **Save**

Manager Feedback

Performance ratings are not visible to Frontline analysts.





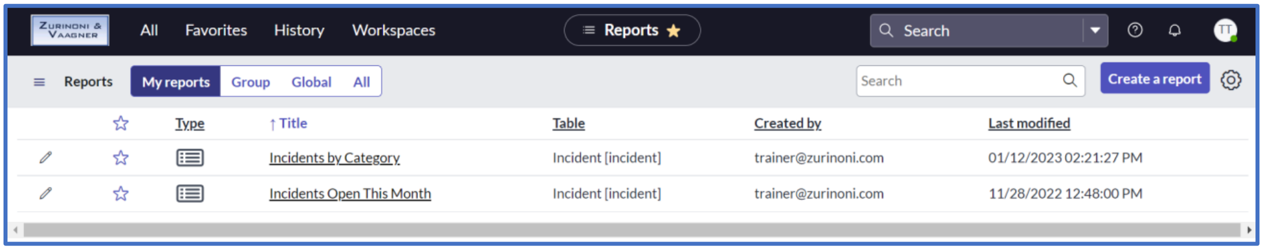
Error Categories can be selected after checking the box next to **Error**

Error Class	Error Type
Documentation	Requester
	Category
	Summary
	Ticket Wizard
	Work Notes
	Misc Documentation
Ticket Handling	Priority
	Improper Closure
	Escalation
	Not Escalated
	Follow Up
Troubleshooting	Research
	Incorrect Steps
	Security
Misc	Miscellaneous

Reports Admin

ServiceNow reports are visualizations of data that are shareable with users. Place them on dashboards and service portals, export to PDF, and email.

To access reports, navigate to **All** > **Reports** > **View/Run**



My reports	Reports created by the logged in user
Group	Reports shared specific groups or users
Global	Reports that are shared as global
All	All reports accessible by the logged in user

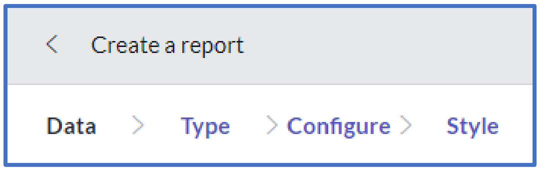
The logged in user can open and run any report that appears in their list

Additional ServiceNow Resources

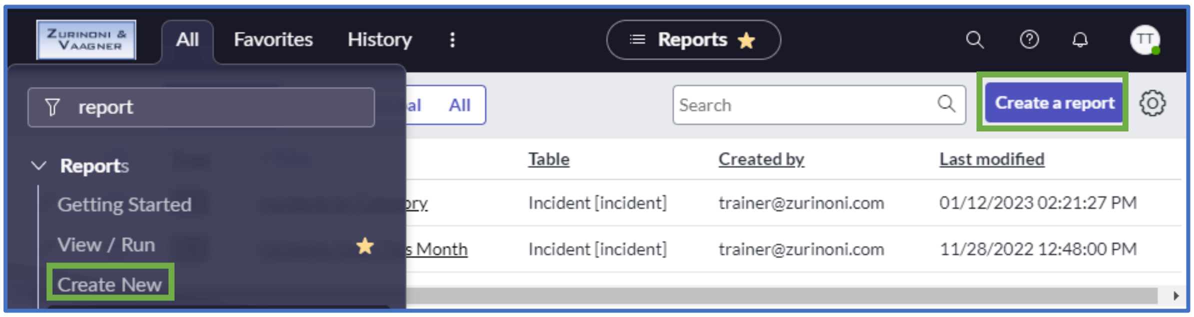
Topic	ServiceNow URL
Getting Started with Reports	https://docs.servicenow.com/bundle/sandiego-now-intelligence/page/use/reporting/concept/c_GenerateReports.html
Report Types	https://docs.servicenow.com/bundle/sandiego-now-intelligence/page/use/reporting/reference/report-types-creation-details-rd.html

Creating Reports

ServiceNow offers the ability to create reports easily from a variety of locations along with a convenient 4-step wizard.

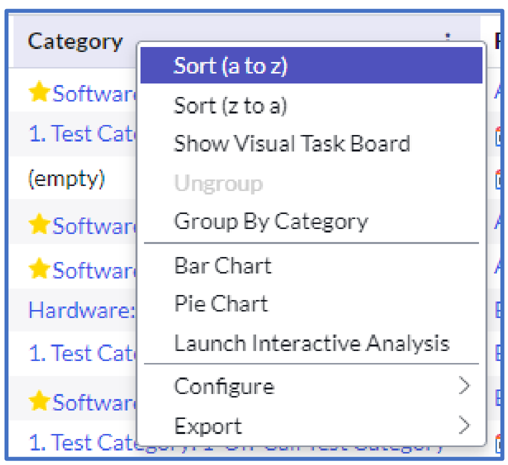


Go to **All** > **Reports**> **Create New** or click the **Create a report** button in the Reports list



OR

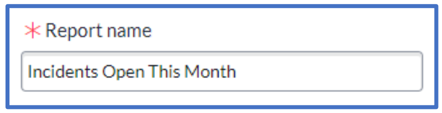
Right click a column header in any list view and choose **Bar Chart** or **Pie Chart**



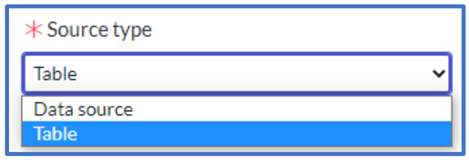
IMPORTANT	Reports need to be shared to be visible to others

Report Data Tab

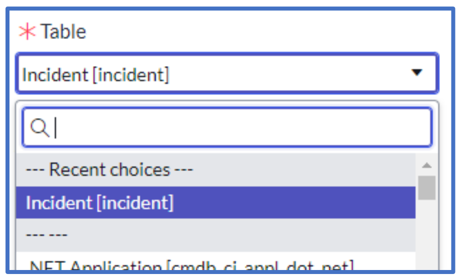
1. Enter a unique and concise name for the report



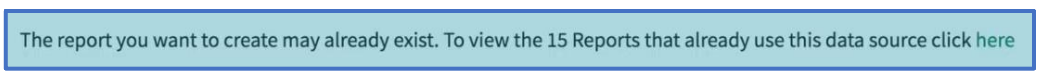
2. Choose a source type



3. Select the desired data source



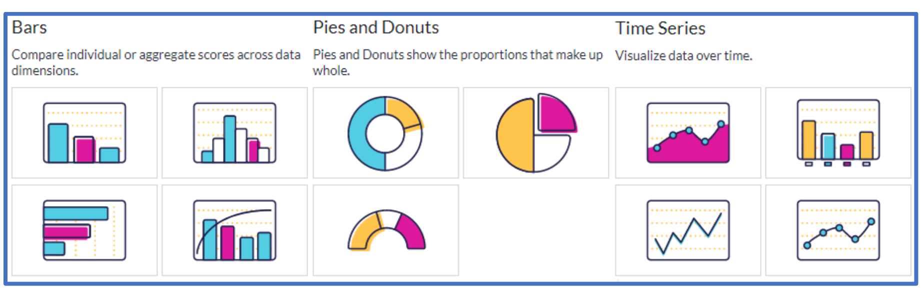
Note: If there is already a report based on the selected data source, a notification displays



Report Types Tab

Report types are visualizations that can be displayed in a variety of ways.

Click the thumbnail of the desired report visualization.



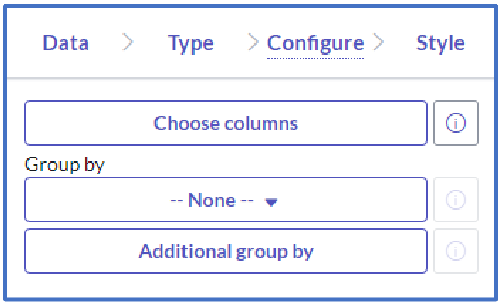
Hover over the thumbnail for a brief description of the report visualization type.

Configure Data Tab

The Configure tab contains a large variety of display and grouping options dependent on the report type selected in the previous tab. This allows for highly customized visualization of each report type.

Configure available options to desired values.

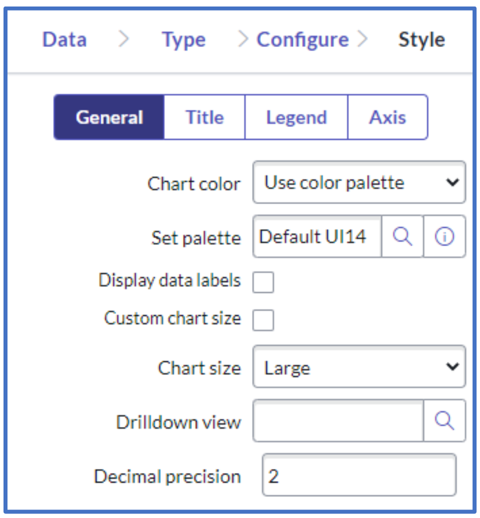
List Type Configuration example



Style Tab

The options on the Style tab are dependent on the selected report type. The Style tab contains additional tabs which may include General, Title, Legend, and Axis. From here, further visual customizations are selected.

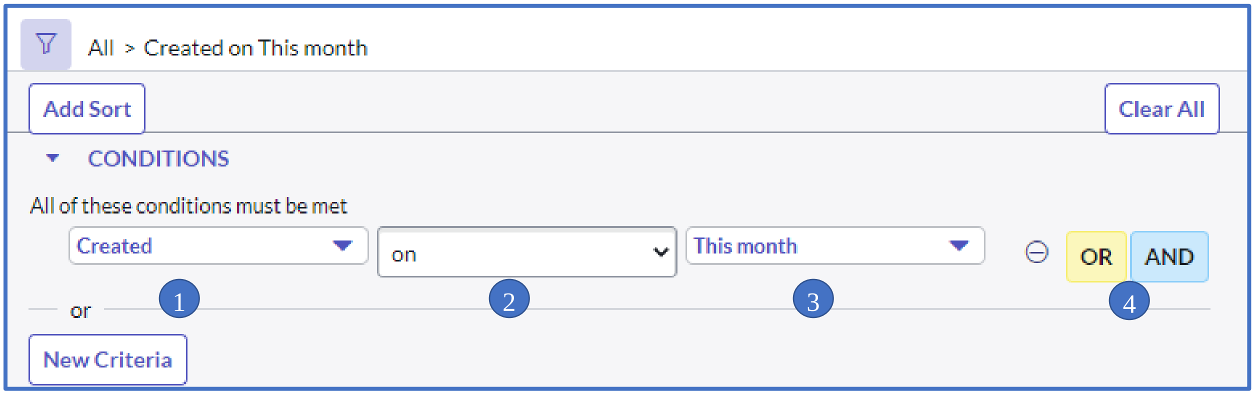
List Type Style example



Condition Builder

In addition to setting options in the 4-step wizard, the condition builder is used to filter report data or results.

Click  to open the condition builder.



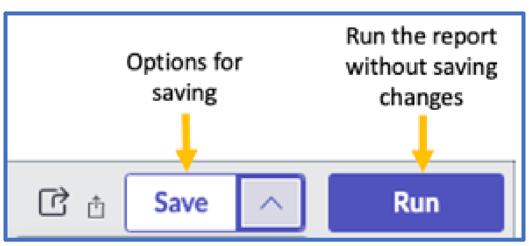
1	**Field**	Select field based on the table
2	**Operator**	Based on the field type. Select from available operators.
3	**Value**	A text entry field or a dropdown list, depending on field type.
4	**Dependent Conditions**	Additional conditions are added by clicking **OR** or **AND**

Additional ServiceNow Resource

Topic	ServiceNow URL
Condition Builder	https://docs.servicenow.com/bundle/sandiego-platform-user-interface/page/use/common-ui-elements/concept/c_ConditionBuilder.html
Values for date/time fields	https://docs.servicenow.com/bundle/sandiego-platform-user-interface/page/use/common-ui-elements/concept/c_ValuesForDateTimeFields.html

Running & Saving Reports

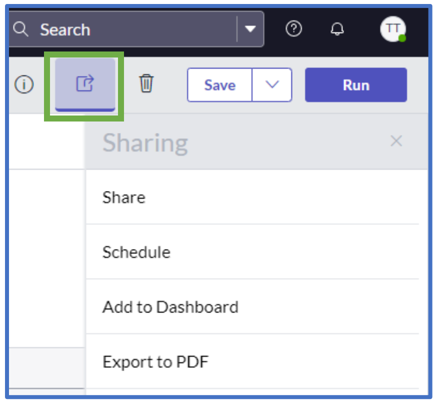
After configuring a report, click the Run button to run the report without saving the changes. To run the report and save the changes, click the Save button.



Sharing Reports

Reports need to be shared with users or groups for them to be visible to others.

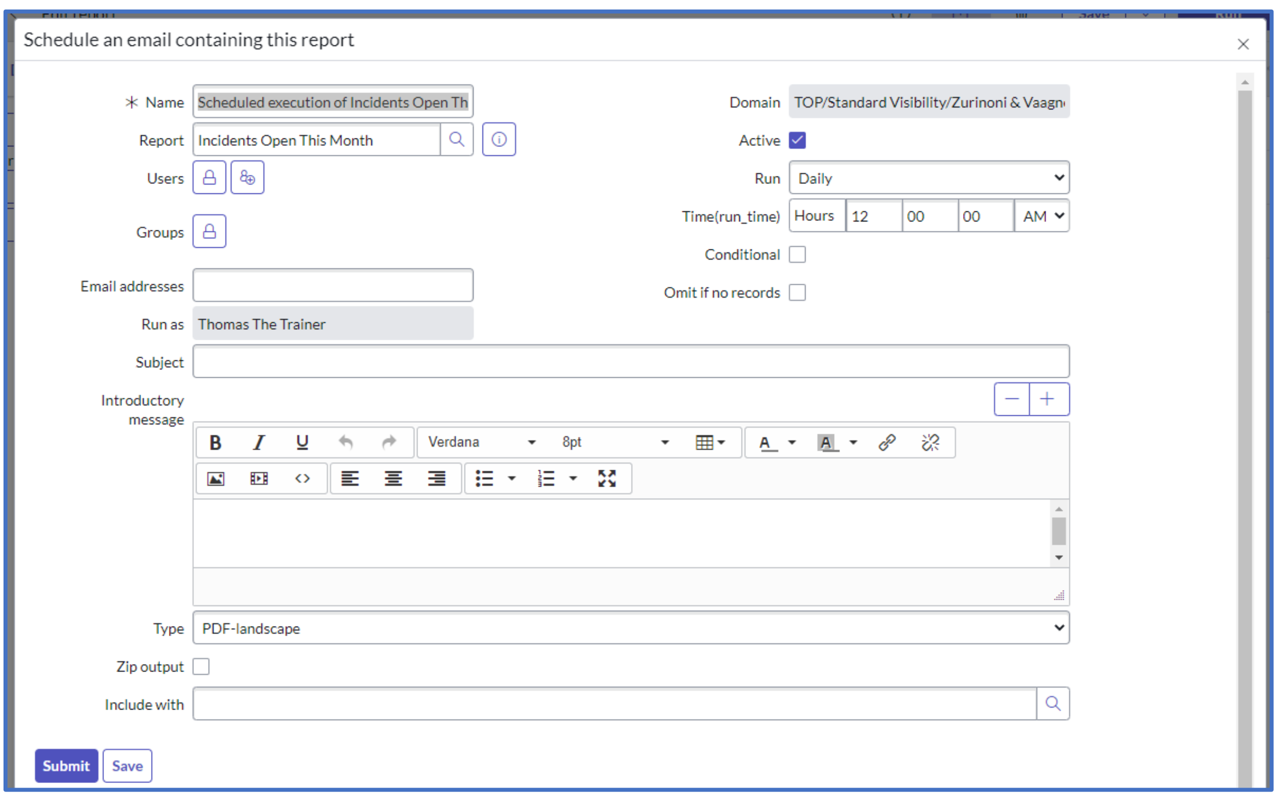
Click the **Sharing** button to bring up a list of sharing options



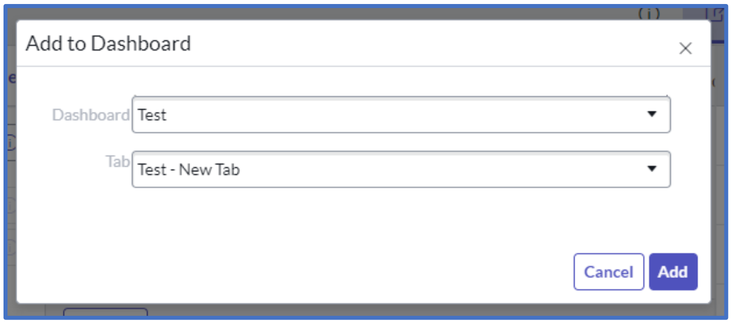
Sharing Options

Share – Share with groups or users
Schedule – Set up a schedule for reports to be emailed.

Scheduled Report Email Template Example



Add to Dashboard – Select a dashboard to display the report. If the dashboard contains multiple tabs, choose the desired tab in the dropdown.



Export to PDF – Generate a PDF for download or to send as an email.