



CLIENT ANALYST GUIDE

QRG – ServiceNow Client Analyst Guide



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INTRODUCTION

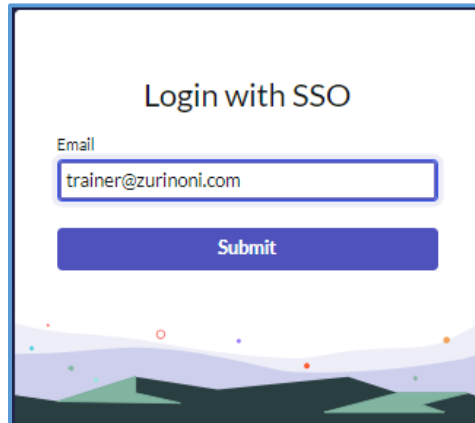
ServiceNow is an Information Technology Service Management system (ITSM) used by the IT Support Team to document and track requester incidents.

ServiceNow Terms	
Terms	Definitions
Assignment Group	IT Support Team's Incident Queue
Assigned To	Analyst the incident is assigned to
Broadcast Message	Temporary knowledge base articles that are relevant for 2 weeks. If the information is relevant for more than 2 weeks a standard knowledge base article is created.
Incident	ServiceNow Ticket window
Outage	A systemic issue affecting multiple users concerning slowness, service outage, or planned outage and maintenance.
Resolve	Marking an incident as resolved does not close the incident in the system. Incidents can be re-opened while in a 'Resolved' state. If no activity on 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 that meet one or more conditions for specific fields found in an incident window.

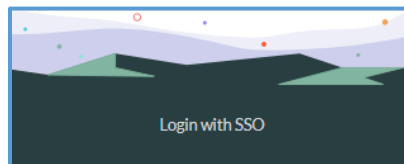
IMPORTANT:	ServiceNow searches based on Starts With . Use an asterisk * in front of search terms if no results are listed.
	Try saving if fields or buttons are missing or lists load without results.

LOG 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**

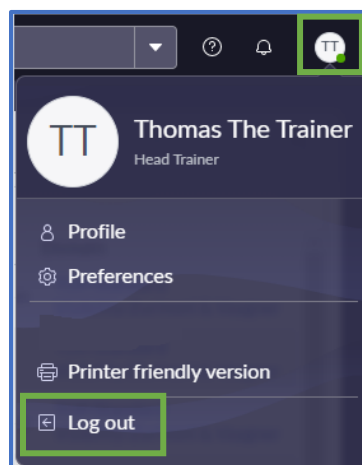


Notes:	If prompted to log on, use company email address and network password.
	If prompted with Username and Password fields, click Login with SSO towards bottom.



LOG OUT

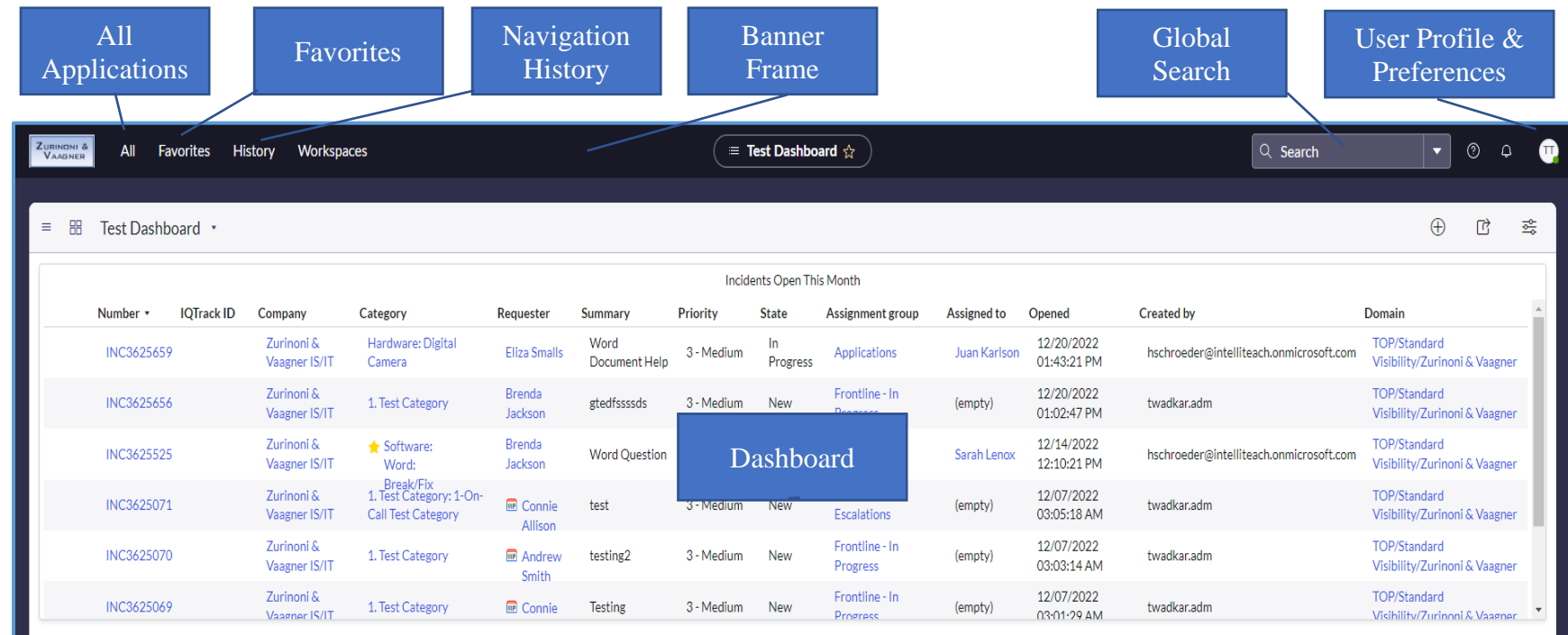
1. Click **User Menu** drop down
2. Click **Log out**



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SERVICENow WEB INTERFACE DIAGRAM



Note:

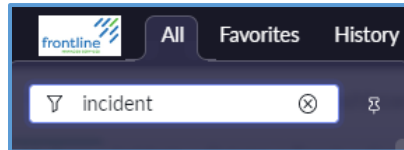
Click the **Pin All menu** button to pin the All, Favorites, or History tabs to left of the interface.

FAVORITES

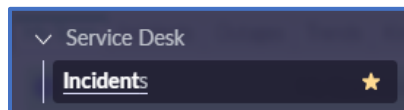
Applications found in the navigation pane can be favorited for quick access. In addition, favorites can be renamed and color-coded.

ADD FAVORITES FROM NAVIGATION PANE

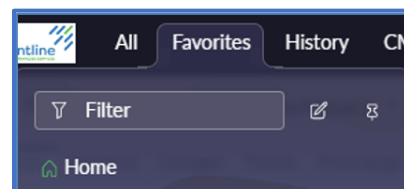
1. Click the **All** tab
2. Locate the application in the navigation pane using the scroll bar or searching in the **Filter navigator** field



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:

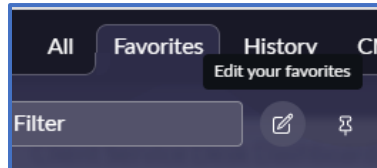
Section	Sub Section	Description
Incident	Incidents All	Displays a searchable list of all incidents (tickets)
	My QA Assessments	Quality control for internal use
	Create New	Creates a new incident (ticket)
	Assigned to me	Displays a list of incidents assigned to the analyst
	Assigned to my groups	Displays a list of incidents assigned to members of a group
	My groups unassigned	Displays a list of incidents that are assigned to a group but not assigned to an analyst yet
Knowledge	Homepage	Displays the knowledge base

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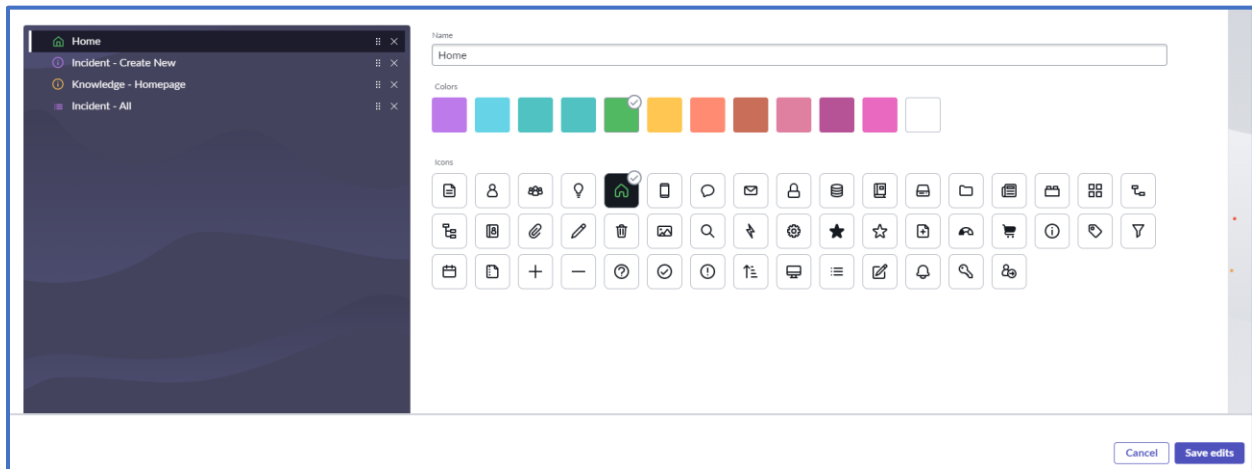
CUSTOMIZE AND RE-ORDER FAVORITES

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



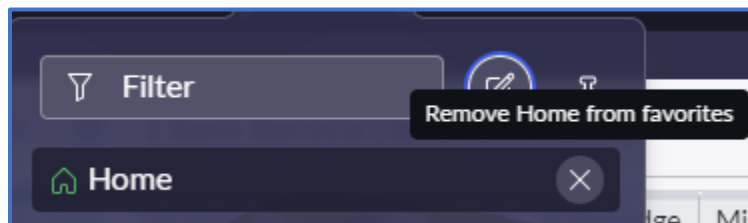
3. Drag & drop to re-order favorites
4. Make desired changes to names, colors, & icons



5. Click **Save edits**

REMOVE A FAVORITE

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



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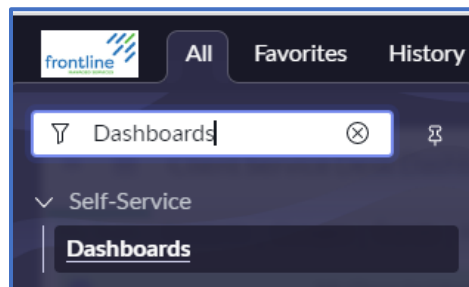


DASHBOARDS

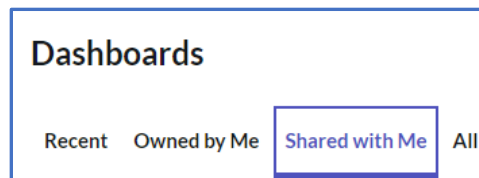
ServiceNow's Dashboard feature provides access to critical information that is revisited on a regular basis. Any variety of reports, widgets, or other resources can be added to help manage the Firm's IT Support Team on a day to day (or minute to minute) basis.

FIND SHARED DASHBOARDS

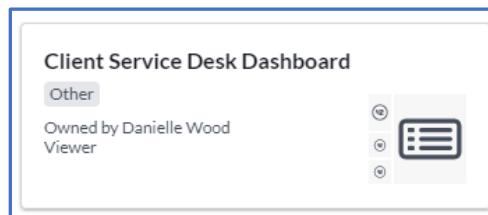
1. Click **All** tab
2. Inside of the **Filter Navigator**, search for the term **Dashboards**
3. Under the Self-Service heading, choose **Dashboards**



4. Select **Shared with Me** tab



5. Select available Dashboard



Notes:	Only dashboards made available to analysts are seen in Shared with Me tab. Clicking Home loads the currently selected Dashboard.
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CLIENT SERVICE DESK DASHBOARD DIAGRAM

This is the current image of the Client Service Desk dashboard. For fields that have a single value in it, clicking the value displays a list of that field's 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.

The screenshot shows the 'Client Service Desk Dashboard' with the following elements and callouts:

- 1**: Navigation tabs (My Team, Incidents, Outages, Trends, Knowledge, Misc).
- 2**: 'My Open Incidents' count (4).
- 3**: 'My Incidents Open 7+ Days' count (3).
- 4**: 'My Resolved Incidents (Last 30 Days)' count (2).
- 5**: 'My Open Incidents' table header.
- 6**: 'Open Incidents (My Group)' count (577).
- 7**: 'My Groups Incidents Open 7+ Days' count (555).
- 8**: 'My Groups Resolved Incidents (Last 30 Days)' count (457).
- 9**: 'Open Incidents (My Group)' table header.

The 'My Open Incidents' table contains the following data:

Number	Category	Channel	Requester	Location	Summary	Priority	State	Assignment group	Assigned to	Opened	Updated
INC3876711	Software: Microsoft Office: Outlook	Phone	Bob Loblaw	San Francisco	Outlook not responding	3 - Medium	In Progress	Frontline - In Progress	John Pfohl	07/19/2022 11:27:41 AM	09/06/2022 01:01:55 PM
INC4139879	Hardware: Digital Camera	Phone	John Quincy Adams	New York	Request for Webcam	3 - Medium	In Progress	Frontline - In Progress	John Pfohl	09/06/2022 12:46:57 PM	09/06/2022 12:47:43 PM
INC3925569	Hardware: Equipment Request: Loaner Laptop	Phone	Alex Johnston	Atlanta	Loaner laptop request	3 - Medium	In Progress	Frontline - In Progress	John Pfohl	07/27/2022 02:17:33 PM	09/06/2022 12:38:35 PM
INC2263761	Hardware: Equipment Request: Loaner Laptop	Phone	Bob Loblaw	San Francisco	Loaner laptop request	3 - Medium	In Progress	Frontline - Escalations	John Pfohl	09/16/2021 11:38:31 AM	06/24/2022 10:30:53 AM

The 'Open Incidents (My Group)' table contains the following data:

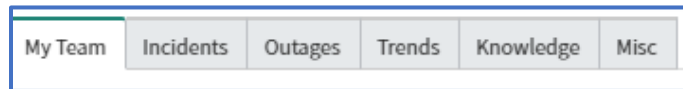
Number	Category	Channel	Requester	Location	Summary	Priority	State	Assignment group
INC0926072	Hardware: Desktop: Floppy Drive	Walk-In	Andy Blaster	London	trying not saving first again	3 - Medium	New	Frontline - In Progress
INC0926075	Hardware: Desktop: Floppy Drive	Email	Amy Cheney	Atlanta	Text from IQE w/attachment - edit	3 - Medium	In Progress	Frontline - In Progress
INC2024801	Software: Microsoft Office: Word	Phone	Pat Gosa	Atlanta	wants keyboard shortcut	3 - Medium	In Progress	Frontline - In Progress
INC3965111	Software: Microsoft Office: Outlook	Phone	Alan Mato	London	How to distribution list	1 - Emergency	New	Frontline - In Progress
INC2773930	Software: Microsoft Office: Excel	Phone	Ace Attorney	Dayton, OH	Test	3 - Medium	New	Frontline - In Progress
INC4119796	Software: Microsoft Office: Excel	Phone	Bob Loblaw	San Francisco	Arrow key in excel moving page	3 - Medium	In Progress	Frontline - In Progress
INC2378672	Software: Windows	Phone	Sydney Johns	Atlanta	attachments won't open	3 - Medium	In Progress	Frontline - In Progress
INC3580955	Network: Network Access	Phone	Ace Attorney	Dayton, OH	Login credentials are invalid.	3 - Medium	New	Frontline - In Progress
INC2031223	Software: Microsoft Office: Word	Phone	Alex Johnston	Atlanta	Page number from 0 to 1	1 - Emergency	In Progress	Frontline - In Progress
INC2797647	Network: Network Access	Phone	Ace Attorney	Dayton, OH	Can't Log into Computer	3 - Medium	New	Frontline - In Progress
INC1654796	Software: Microsoft Office: Outlook	Email	Darlan Graff	Toledo	Expected email missing	3 - Medium	New	Frontline - In Progress
INC1948537	Software: Microsoft Office: Word	Phone	Bob Loblaw	San Francisco	New style in Word	3 - Medium	In Progress	Frontline - In Progress
INC1776208	Software: Microsoft Office: Word	Phone	Bob Loblaw	San Francisco	Request for instructions on creating a new style in Word 365	3 - Medium	New	Frontline - In Progress
INC2285947	Admin	Phone	Ace Attorney	Dayton, OH	Client states that he is unable to log into computer. Incorrect username or password.	1 - Emergency	New	Frontline - In Progress

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			

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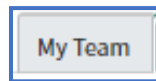


CLIENT SERVICE DESK DASHBOARD PAGES



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.

The screenshot displays the 'Client Service Desk Dashboard' with the 'My Team' tab selected. The dashboard is divided into two main sections: a summary on the left and a detailed incident list on the right.

Summary Section:

- My Open Incidents:** 4 incidents.
- My Incidents Open 7+ Days:** 3 incidents.
- My Incidents (Last 30 Days):** 2 incidents.
- Open Incidents (My Group):** 577 incidents.
- My Groups Incidents Open 7+ Days:** 555 incidents.
- My Groups Resolved Incidents (Last 30 Days):** 457 incidents.

Incident List Table:

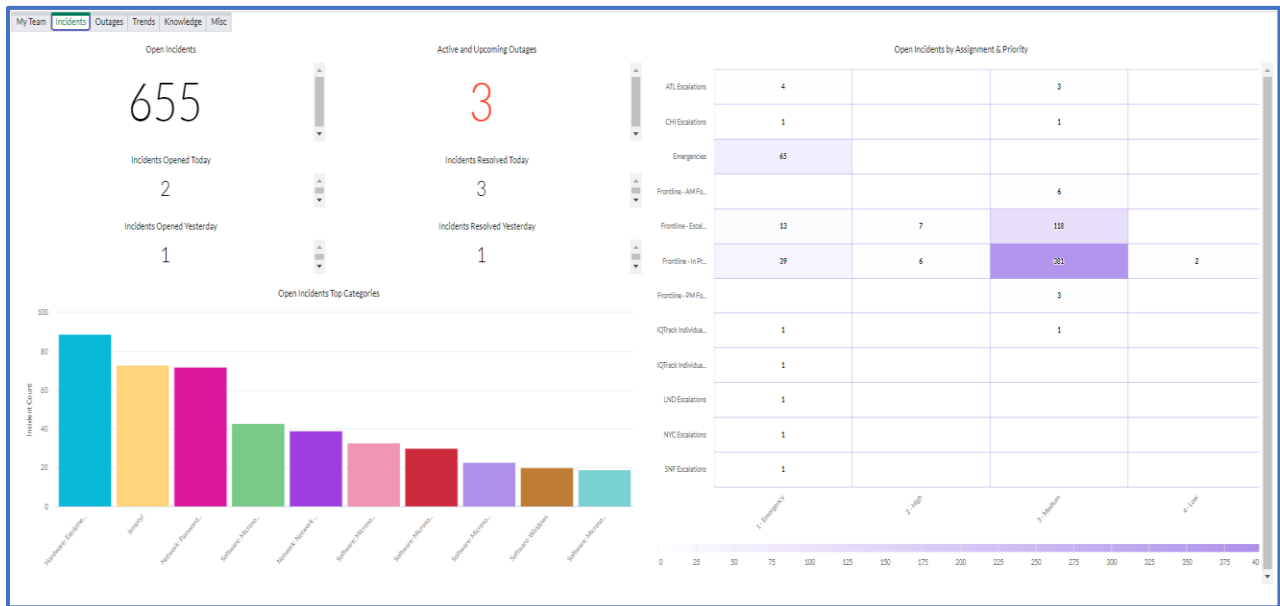
Number	Category	Channel	Requester	Location	Summary	Priority	State	Assignment group	Assigned to	Opened	Updated
INC0374711	Software: Microsoft Office: Outlook	Phone	Bob Loblaw	San Francisco	Outlook not responding	3 - Medium	In Progress	Frontline - In Progress	John Pohl	07/19/2022 11:27:41 AM	08/04/2022 01:01:55 PM
INC4139879	Hardware: Digital Camera	Phone	John Quincy McArthur		Request for Webcam	3 - Medium	In Progress	Frontline - In Progress	John Pohl	08/04/2022 12:46:57 PM	08/04/2022 12:47:43 PM
INC3925569	Hardware: Equipment Request: Loaner Laptop	Phone	Alex Johnston	Atlanta	Loaner laptop request	3 - Medium	In Progress	Frontline - In Progress	John Pohl	07/27/2022 02:17:35 PM	08/04/2022 12:38:35 PM
INC2263761	Hardware: Equipment Request: Loaner Laptop	Phone	Bob Loblaw	San Francisco	Loaner laptop request	3 - Medium	In Progress	Frontline - Escalations	John Pohl	09/16/2021 11:38:31 AM	06/24/2022 10:30:53 AM

The table continues with more incidents, including those with 'Emergency' status and various assignment groups like 'Frontline - In Progress' and 'Frontline - Escalations'.

INCIDENTS

Incidents

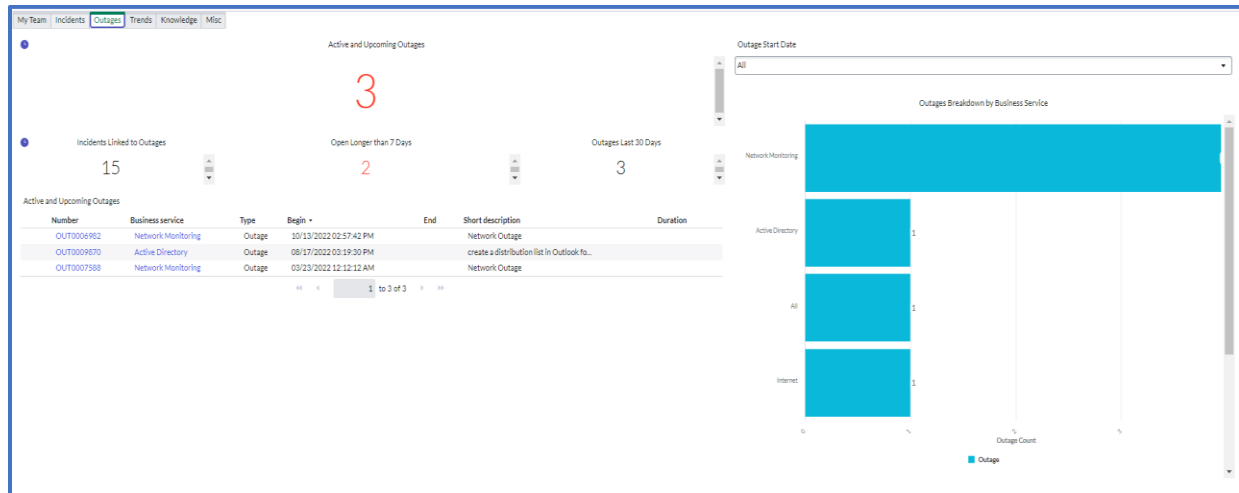
The **Incidents** page is the go-to page regarding all things Incident Related. An analyst can see a variety of fields to obtain data regarding aspects of Open Incidents, Resolved Incidents, Outages, Incident Assignments and Top Categories.



OUTAGES

Outages

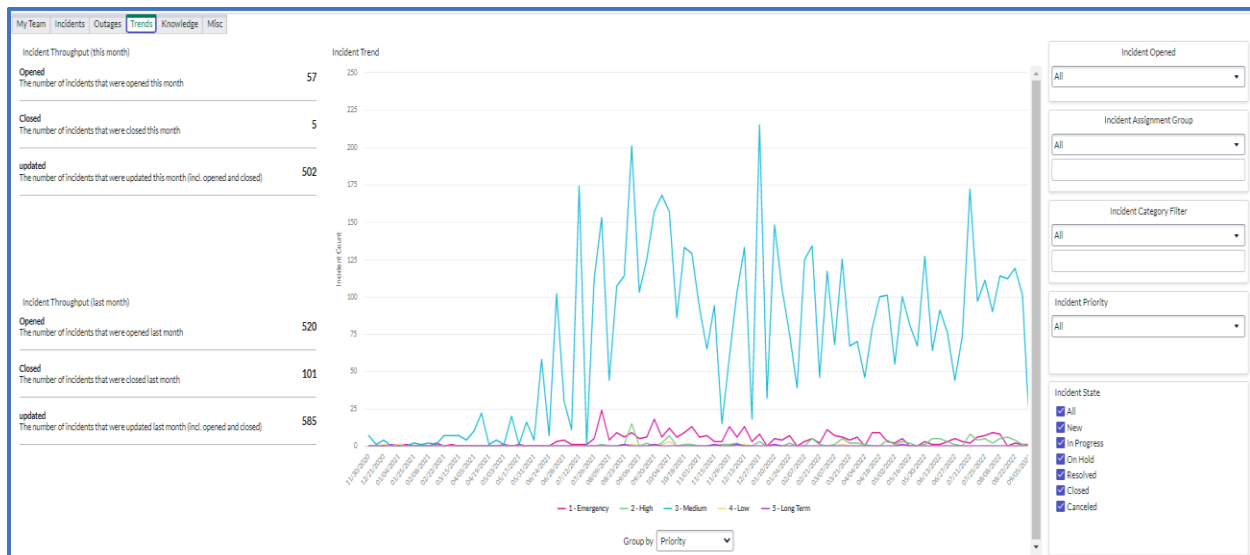
As the name suggests, **Outages** organizes outage information for the firm. This Dashboard allows the analyst to view open active outages and their age as well as a breakdown of which Business Service the Outages apply to in the system.



TRENDS

Trends

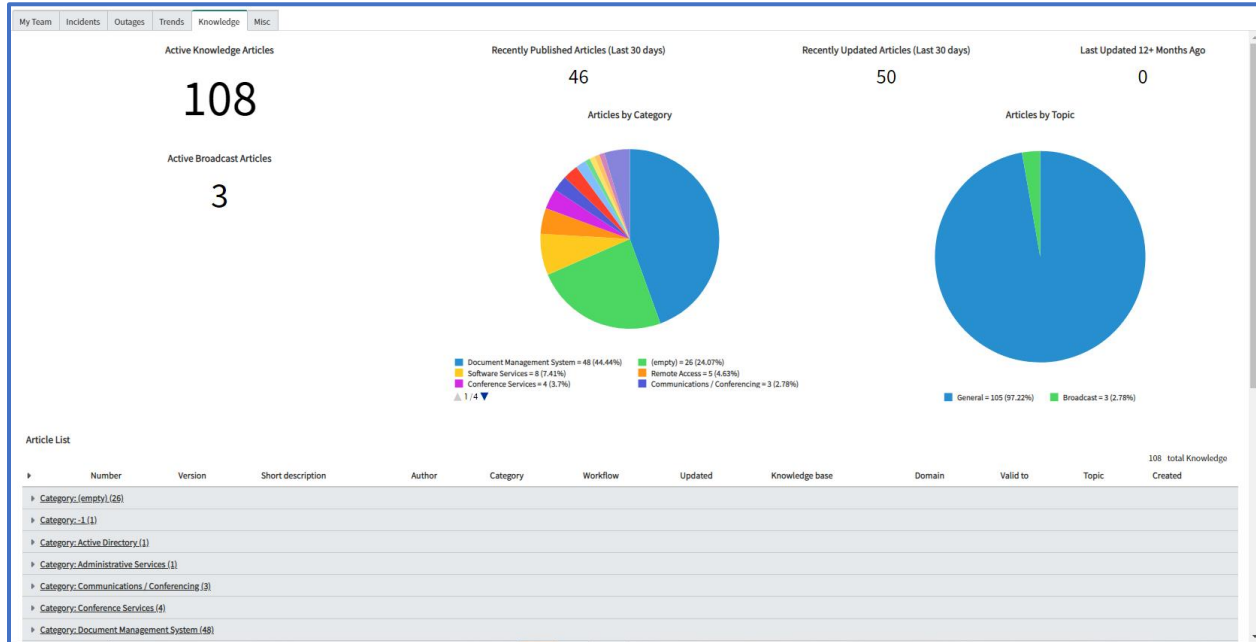
Trends displays data regarding incident trends for the month. There are filters for Grouping and reviewing incident trends under several conditions.



KNOWLEDGE

Knowledge

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



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Misc



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

My Team

Incidents

Outages

Trends

Knowledge

Misc

VIP Users

34

Open VIP Incidents

36,262

Total Ticket Wizards

38

VIP Notes List

User ID	Name	Title	Location	VIP notes
mobo928777777@hotmail.com	Amy Choo	Paralegal	Tokyo	Sometimes works from home. When she work...
fake1@fake.com	New Requester Firm XYZ		Newark	Please see KB0012345 for client names, e...
methose123@example.com	Sir Donald Gallup	Member	Atlanta	Donald is on the IT committee for the firm.
jxherriott@fake.email	Jeffrey Herriott	People Manager	London	Left-handed.
ServiceNowTest@intelliteach.com	Viola Gehrmann	Legal Secretary	Goa	Teacher at the Elementary School.
jordanmoore@gmail.com	Jordan, Devilishly- Handsome Moore	Ambassador of Cool	Atlanta	Kind of a big deal

Ticket Wizard List

Name	Display name	Wizard template	Updated ▲
Citrix/How To	★ Software: Remote: Citrix/How To	<p>What Citrix Server have the connected	03/25/2021 07:58:19 AM
iPad	Hardware: PDA: iPad	<p>for iphone see the category called iP	03/25/2021 07:59:06 AM
Departing User	Network: Departing User	<p>Workstation: All equipment has been r	03/25/2021 08:00:25 AM
Citrix Break/Fix	Software: Remote: Citrix Break/Fix	<p>What Citrix Server have the connected	04/06/2021 07:16:20 AM
Document Restore	Software: Document Manager: Document Res...	<p>What is the urgency of the restoratio	04/20/2021 09:08:46 AM
CD Copy	Admin: CD Copy	<p>Do you know what a Goomba is? <b	04/20/2021 09:08:49 AM
Reader	★ Software: Acrobat (PDF): Reader	<p>Is this PDF saved into DM? <br /	04/21/2021 12:28:44 AM
Installation	Software: Installation	<p>Program Name:</p>	04/21/2021 12:28:44 AM

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INCIDENTS (INC)

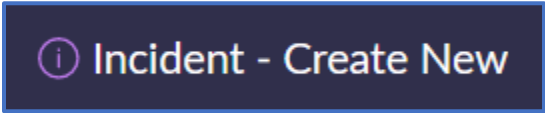
SERVICENOW INCIDENT WINDOW DIAGRAM

The diagram illustrates the ServiceNow Incident window layout with the following components and callouts:

- Outage Banner**: A red banner at the top indicating an outage for Zurlinon & Vaagner IS/IT.
- Incident Number**: The incident number, INC3625771.
- Requester Office Location**: Fields for Requester (Adam Ayl), Contact, Location (Atlanta), Service, and Configuration Item.
- Category**: Fields for Channel (Live Call), Due date, Impact (3 - Requires Further Troubleshooting), Urgency (3 - Today (Office Open)), and Priority (3 - Medium).
- Summary**: Fields for Category (Software: Word: Table of Authorities) and Summary (Training Incident).
- Wizard Answer**: The Wizard answer field.
- Resolution Information**: The Resolution information field.
- Work notes**: The Work notes field.
- Company (Client)**: The company name, Zurlinon & Vaagner IS/IT.
- State**: The incident state, In Progress.
- Assignment Group**: The assignment group, ServiceNow Administrators - Zurlinon.
- Assigned to**: The assigned user, Thomas The Trainer.
- Manage Attachments**: A button to manage attachments.
- More Options / Email**: A button to view more options or email the incident.
- Update, Resolve, Save Buttons**: Buttons to update, resolve, or save the incident.
- Related Search Results**: A link to view related search results.

CREATE AND SAVE AN INCIDENT

1. Click **Incident – Create New** from the All or Favorites navigation pane



2. Complete the required fields

Required Field	Description
Requester	Person experiencing a software issue or needing hardware assistance
Location	Office location the requester is working from
Channel	Origin of an incident (Phone Call, Email, Voicemail)
Category	General category for the incident that should match the subject of the summary
Summary	Brief and concise description of the issue or request.
Company	Client (Firm)
Assignment group	IT Support Team's incident queue

3. Click **SAVE**

Note:	Clicking Update or Submit saves any updates to the incident, closes the incident window, and returns the analyst to the page they were on before the incident window was generated.
IMPORTANT:	Clicking the Swap button swaps the requester and contact fields. The ticket must be saved after swapping the requester and contact fields, before initiating an email from the incident window. Saving an incident updates the fields. This is necessary to avoid contacting the wrong requester.

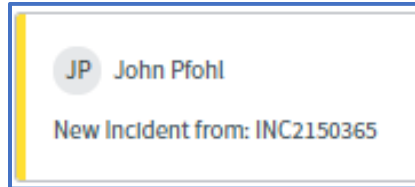
Additional Fields

Field	Description	
Contact	Person that calls on-behalf of the requester and is the primary contact (may not have this for every incident)	
Service	Used to attach incidents to outages	
Due date	Date and time the incident needs to be completed. This field has no impact on the priority field. Only use this field if there is a specific time the incident needs to be completed in the future.	
Impact	1 – Potential Outage	Overall impact for the firm as a whole or the requester
	2 – Single User Work Stoppage	
	3 – Requires Further Troubleshooting	
	4 – Not User Impacting	
Urgency	1 – Immediately	Urgency of the incident
	2 – Today (Office Closed)	
	3 – Today (Office Open)	
	4 – Next Business Day	
	5 – Future	
Priority	This field cannot be modified. The Impact and Urgency fields are used in an underlying matrix to determine the priority. That matrix is developed/customized by the client. Analysts must focus on setting the Impact and Urgency correctly, rather than selecting them to achieve a desired priority.	
State	1 – New	New incident windows default to this state
	2 – In Progress	Incident window has been saved
	3 – On Hold	Incident referred for follow-up
		Select appropriate reason in On Hold reason field.
	4 – Resolved	Incident is resolved
	5 - Canceled	Used to send duplicate incidents for cancelation Canceled incidents are not deleted from the system.
Assigned to	Analyst the incident is assigned to	
Advanced assignment	Enable to see assignment groups the analyst is not a member of	
Visit requested	Enable when a requester needs a technician to visit them	

MULTIPLE INCIDENTS FROM ONE CONTACT

Requesters may provide a new issue while working the original incident or after the analyst has given a last offer of service using the closing script.

Reference the original incident number in the new incident's work notes.

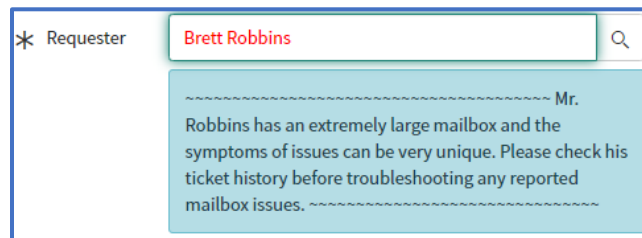


VIP NOTES

VIP notes contain important information about the requester. They provide insight on the requester's temperament or their technology setup. (Example: Bob has a left-handed mouse.)

Requesters that have VIP notes display in red font, and the note displays under the Requester field.

VIP notes have a 500-character limit.



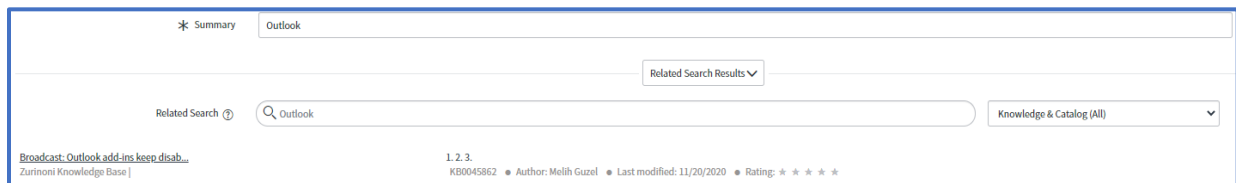
BROADCASTS

Broadcasts contain escalation procedures, fixes, and work arounds. They help save time as well.

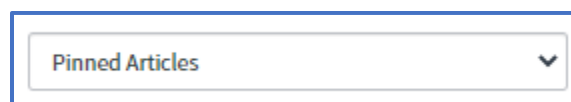
Broadcasts are more temporary than a general knowledge base article and are also referred to as Pinned KBs.

It is important to review current and future broadcasts from the Dashboard.

Broadcasts are found in **Related Search Results** on the incident window as well. They are pinned to a keyword and display at the top of the list when the keyword is used in the **Summary** or the **Related Search** field.



Selecting **Pinned Articles** from the **Related Search** drop-down menu narrows the results to Broadcast messages.

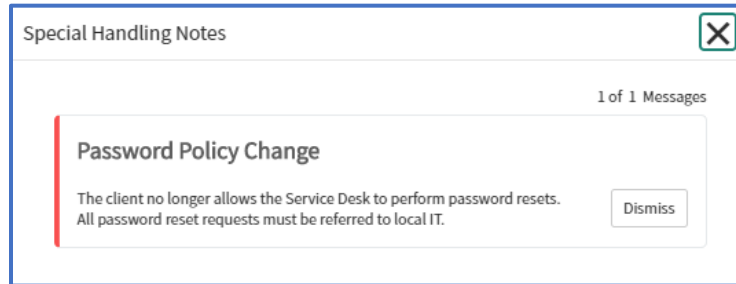


SPECIAL HANDLING NOTES

Special Handling Notes display concise, critical information in a pop-up window after opening an incident window.

They can be based on various fields on the incident window.

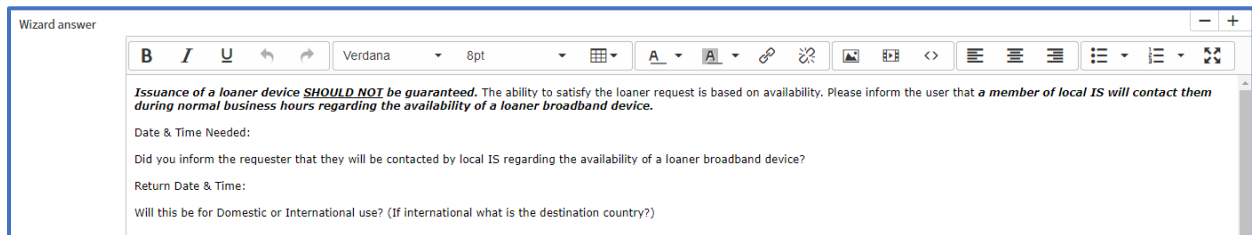
It is required to read the notes and follow the handling procedures.



INCIDENT WIZARDS

Wizards are dependent on what category is selected in the incident and inserted in the activities section of the incident window.

They contain important information to be aware of and **questions that need to be answered**. In addition, Wizards may contain possible solutions.

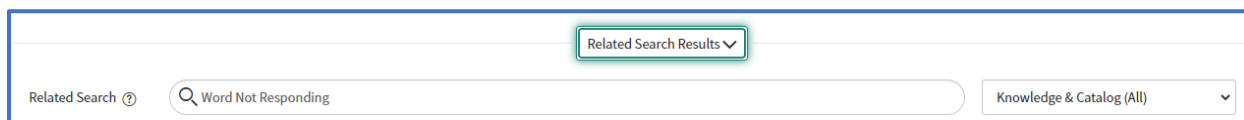


Click **Save** to store Wizard answers in the incident window's activity notes.

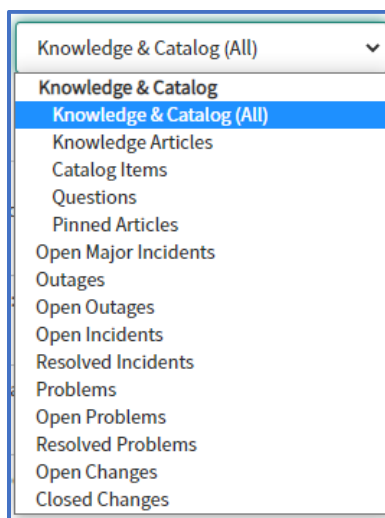
RELATED SEARCH RESULTS


Related search results are based on the summary of an incident, not the category. The initial search results are presented in the middle of the incident form and not on a separate tab. For this reason – the initial summary needs to be as accurate and concise as possible to return relevant results.

It is required to search from the ServiceNow Knowledge Base Homepage if Related Search Results does not present a useful resource.



A variety of filtering options are available to view related knowledge base articles, incidents, and outages from the incident window.

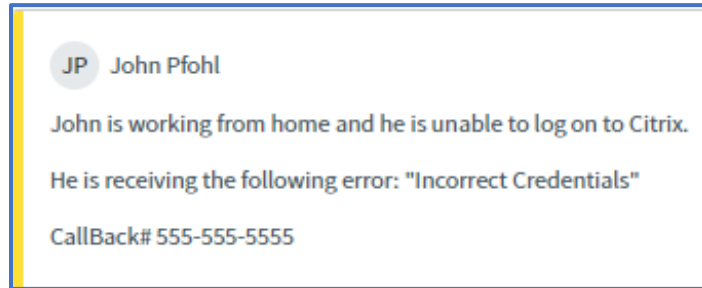


Notes:	 <p>Click the Attach button located to the right of a knowledge base article to quickly insert a hyperlink in Work notes field.</p>
	<p>Clicking on an incident that is in a “Closed” state provides the solution information. It does not display the activities. It is important to document the resolution steps in the Resolution Notes field for future analysts to use as a resource.</p>
	<p>Otherwise, the incident must be opened from an incident or global search to see the activities.</p>
	<p>Related Search Results uses an algorithm to present possible resolutions based on the summary but is limited to only displaying the top 5 such results from across ALL KBs. Best practice is to search the firm’s KB from the KB Homepage to be sure to locate all relevant results for the incident.</p>

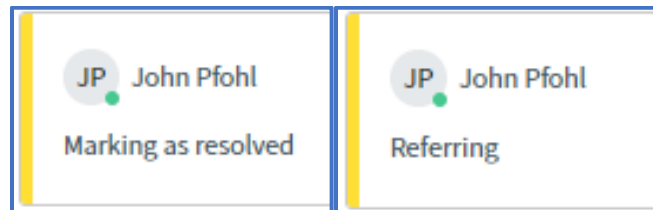
INCIDENT DOCUMENTATION STANDARDS

All relevant details must be documented in the incident. **If it is not in the incident, it did not happen.**

- Each issue gets its own incident. Do not document multiple issues in the same incident.
- Most of the documentation is entered in the **Work notes** field.
- The first work note is a more detailed version of the incident summary, and it is a full sentence starting off with the requester's name.



- Subsequent work notes are used to document the steps taken and what happened after taking the steps or what information was found. Multiple troubleshooting steps should not be documented into one work note. Step them out individually.
- The final work note states the intentions for the incident, marking as resolved or referring.



- Error messages are contained in quotation marks and a direct quote of the message.
 - Example: Error: "Microsoft Word has encountered a problem and needs to close."

DOCUMENTING A WORK NOTE

Work notes are used to document troubleshooting steps, results, site resources, and document any other details relevant to the work note.

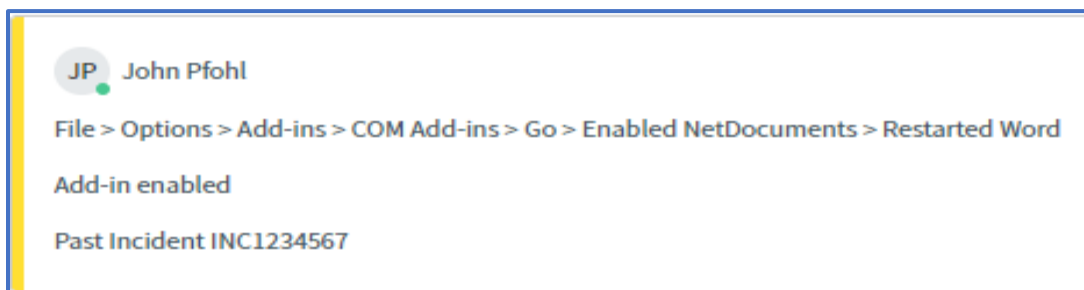
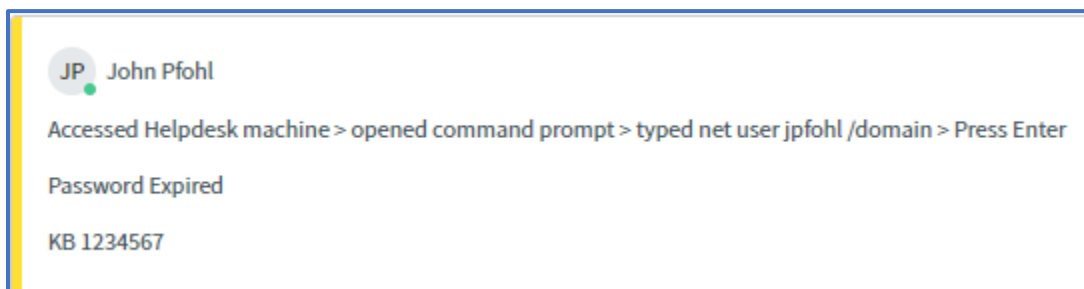
Once a work note is posted, it **cannot** be edited or removed.

Additional comments is a journal field that is visible to requesters, and requesters are emailed a copy of any information entered in this field – these are rarely used during the documentation process.

There is a standard for documenting troubleshooting steps in Work notes:

- The first line(s) are the step or consecutive steps taken.
- The second line(s) is what happened after taking the step(s) or what information was found.
- The third line is used to document resources.
- The remaining lines are used for any additional notes relevant to the work note.
- For readability, each line should be separated by pressing **Enter** twice.

Examples



Steps:

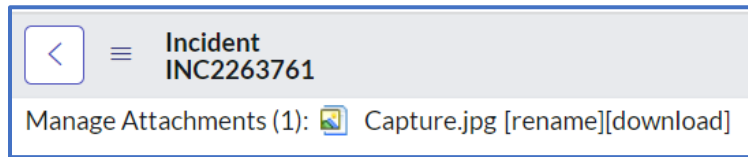
1. Click into the **Work notes** field
2. Type notes
3. Click **Post** or tab over to the button and press **Enter**

Note:

Tab three times from the **Work notes** field and press enter to post the work note quickly. After posting a work note press Shift + Tab three times to return to the **Work notes** field.

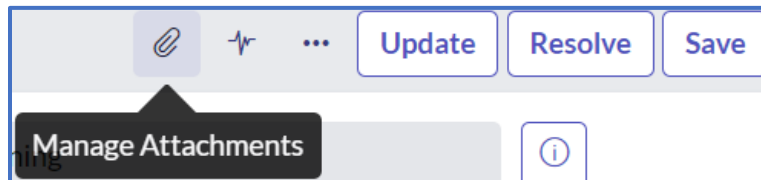
MANAGE ATTACHMENTS

Files display at the top of the incident window once they are attached.



Attach a File

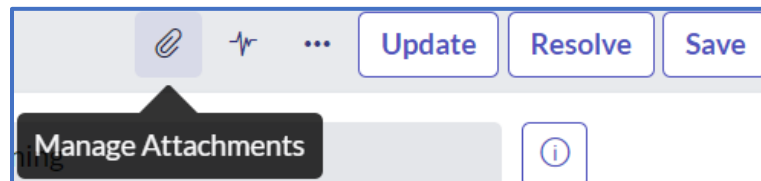
1. Click the **Manage Attachments** button



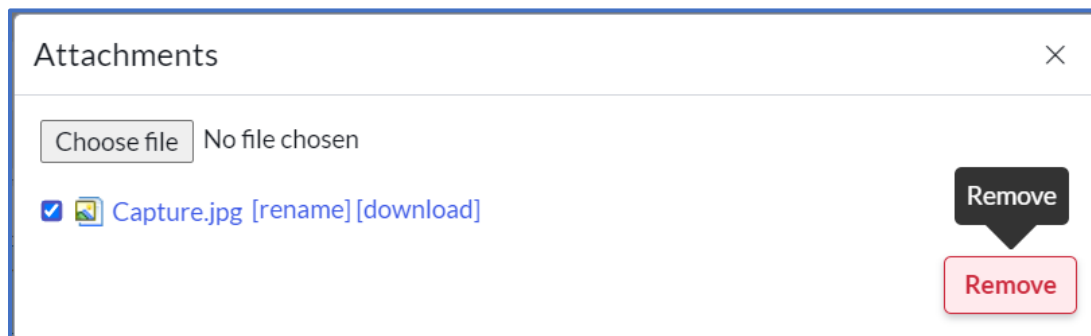
2. Click **Choose file**
3. Select the file(s)
4. Click **Open**

Remove a File

1. Click the **Manage Attachments** button



2. Check the box next to the file
3. Click **Remove**



Note: The file size limit is 50 MB.

EMAIL FROM THE INCIDENT WINDOW

Emails created and sent to the requester from the incident window in ServiceNow.

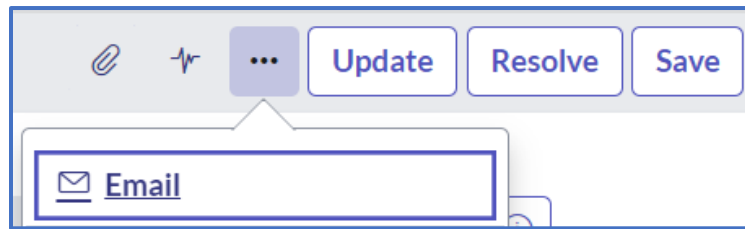
Do not email requesters URLs to solutions. Solutions are clearly stepped out within the email.

Emails start off with the word ‘Hello’ followed by the requester’s name.

Once an email is sent from the incident window, it is documented as an activity.

Files attached to emails are attached to the incident window after clicking **Send**.

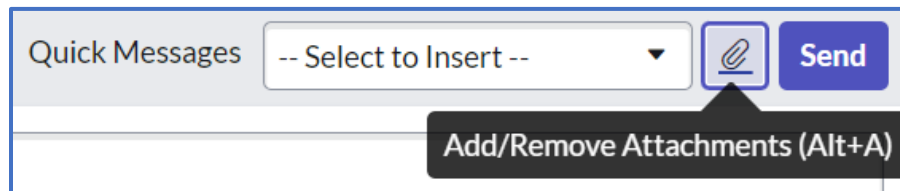
1. Click **More Options**
2. Click **Email**



3. Type out the email
4. Click **Send**

ADD AND REMOVE EMAIL ATTACHMENTS

1. Click the **Add/Remove Attachments** button or press Alt + A



2. Click **Choose file**
3. Select the file(s)
4. Click **Open**

To remove an attachment, click the check box next to the attachment and click **Remove**.

MARKING AN INCIDENT RESOLVED

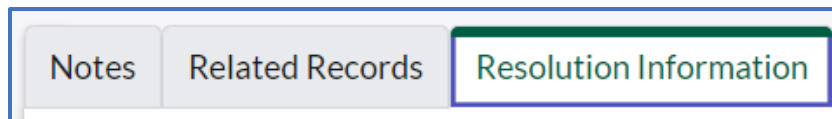
Marking incidents resolved creates a solution bank in ServiceNow. Resolved incidents can be used to find steps for solution or see how an issue was handled in the past.

If there is no activity on an incident within 5 days after it is marked resolved, the incident automatically closes in the system.

Once an incident is closed in the system, it **cannot be reopened**.

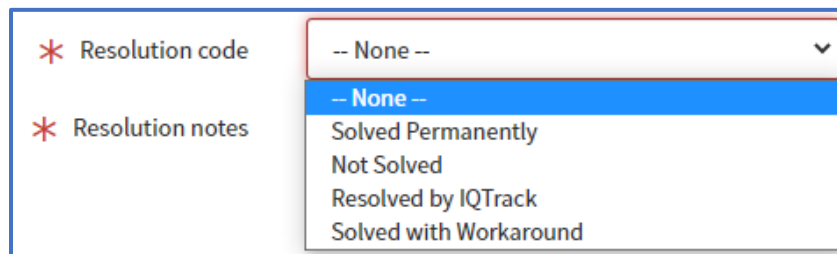
Steps:

1. Click the **Resolution Information** tab below **Related Search Results**



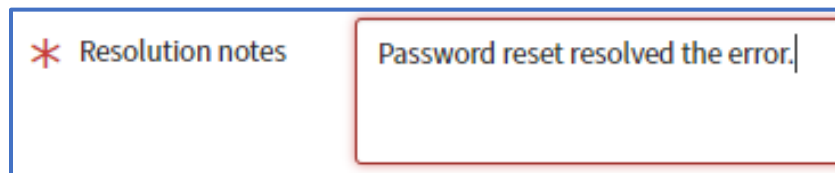
A screenshot of the ServiceNow interface showing three tabs: 'Notes', 'Related Records', and 'Resolution Information'. The 'Resolution Information' tab is selected and highlighted with a blue border.

2. Select the appropriate **Resolution code** from the drop-down menu



A screenshot of the 'Resolution code' drop-down menu. The menu is open, showing options: '-- None --', 'Solved Permanently', 'Not Solved', 'Resolved by IQTrack', and 'Solved with Workaround'. The 'Solved Permanently' option is highlighted in blue.

3. Enter the **Resolution notes** (just the steps that solved the issue)



A screenshot of the 'Resolution notes' text field. The field contains the text 'Password reset resolved the error.' and is highlighted with a blue border.

4. Click **Resolve**

Note: There is no need to document a resource in the resolution notes. Resources are documented within work notes.

ESCALATING/REFERRING INCIDENTS

If the incident needs to be worked by a different assignment group, the incident can be escalated/referred by assigning it to the appropriate group in the **Assignment Group** field.

1. Document in Work notes the reason for referral and verify that all relevant information is in the incident window. (Anything attempted troubleshooting steps and their results, resources used, etc.)
2. Change the **Assignment group** field to the appropriate group
3. Click **Update**

Notes:	If assigning to an assignment group, there is no need select an individual in the Assigned To field as they can pick it up in the queue.
	<p>If unable to find desired group in Assignment Group field, click checkbox to enable Advanced assignment.</p> <div><div>* Assignment group <input type="text"/></div><div>Advanced assignment <input checked="" type="checkbox"/></div></div>

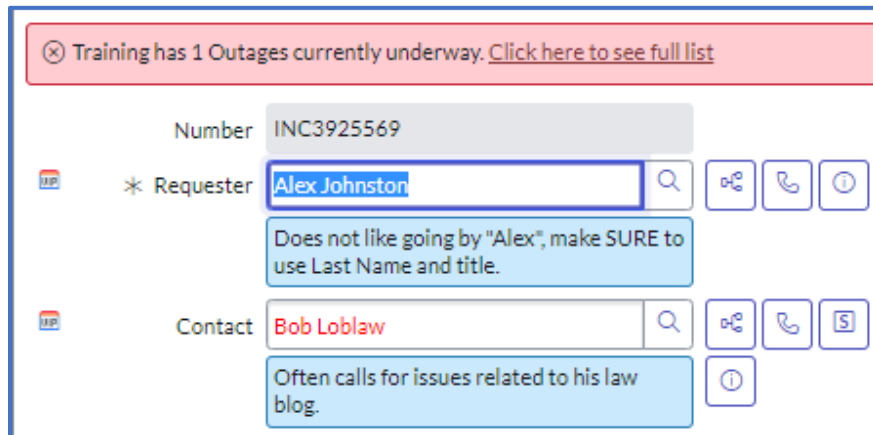
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LINKING INCIDENTS TO OUTAGES

An outage is a systemic issue affecting multiple requesters.

Once an outage has been identified, an outage notification is created in ServiceNow. Once an outage is resolved, analysts are responsible for contacting the requesters and alerting them that the outage is over.

Outage notifications display towards the top of the incident window.



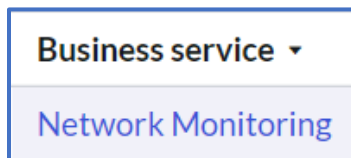
Training has 1 Outages currently underway. [Click here to see full list](#)

Number: INC3925569

* Requester: Alex Johnston
Does not like going by "Alex", make SURE to use Last Name and title.

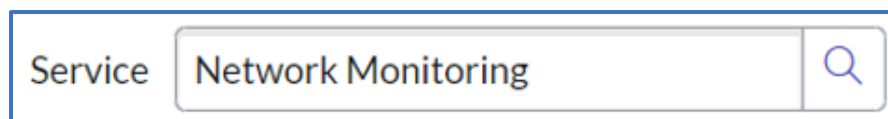
Contact: Bob Loblaw
Often calls for issues related to his law blog.

1. Click the **Click here to see full list** link
2. Locate the outage and review the **Business service** column



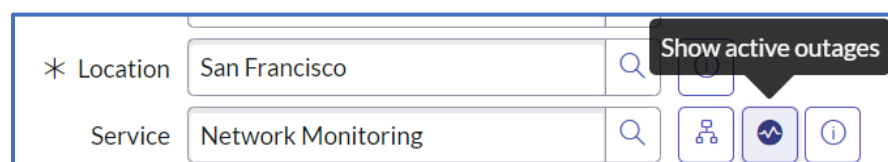
Business service ▾
Network Monitoring

3. Match the **Service** field in the incident window to the service listed in the **Business service** column



Service: Network Monitoring

4. Click **SAVE**
5. Click the **Show active outages** button to the right of the **Service** field



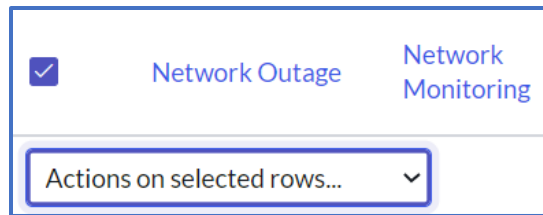
* Location: San Francisco

Service: Network Monitoring

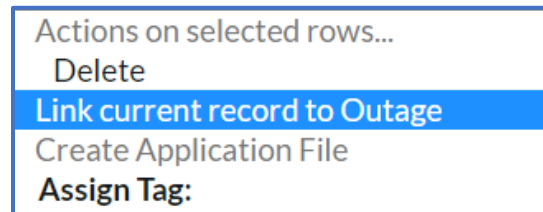
Show active outages

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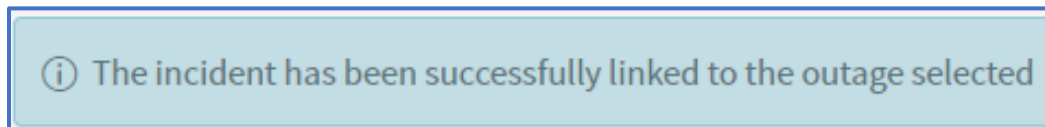
6. Click the check box next to the outage
7. Click the **Actions on selected rows...** drop down menu



8. Select **Link current record to Outage**



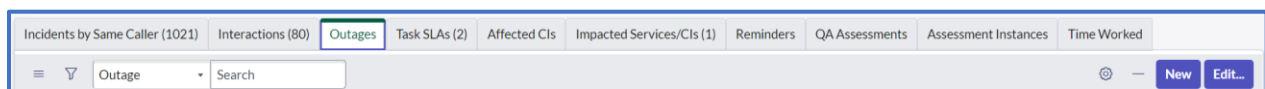
A notification displays towards the top of the incident window confirming if it was successfully linked to the outage.



Note: If outages do not list after clicking the **Show active outages** button, confirm that the incident window is saved and try again.

UNLINKING INCIDENTS FROM OUTAGES

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



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

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REVIEW TICKETS ATTACHED TO AN OUTAGE

1. Click **Click here to see full list** link

2. Click the outage number
3. Select the **Tasks** tab towards the bottom of the window

Affected CIs (1)

Tasks (47)

≡

🔍

Task

Search

⚙️

—

Actions on selected rows...

New

Edit...

Outage = OUT0007588

<input type="checkbox"/>	<input type="text" value="🔍"/>	Business service	Type	Begin	End	Duration	Task *
<input type="checkbox"/>		Network Monitoring	Outage	03/23/2022 12:12:12 AM	(empty)		INC3240834
<input type="checkbox"/>		Network Monitoring	Outage	03/23/2022 12:12:12 AM	(empty)		INC3240836
<input type="checkbox"/>		Network Monitoring	Outage	03/23/2022 12:12:12 AM	(empty)		INC3264856

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INCIDENT OWNERSHIP

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

Client Service Desk Dashboard

My Team Incidents Outages Trends Knowledge Misc

My Open Incidents

4

My Incidents Open 7+ Days

4

My Resolved Incidents (Last 30 Days)

0

My Open Incidents

Number	Category	Channel	Requester	Location	Summary	Priority	State	Assignment group
INC3612145	Hardware: Digital Camera	Email	Roberta Smith	Atlanta	Echo Folder not Syncing	3 - Medium	On Hold	Local Support - Atlanta
INC3614115	Network: Wireless Network	Email	Roberta Smith	London	Error in Word	3 - Medium	In Progress	Local Support - Atlanta
INC3611969	Software: Remote	Email	Kevin Mathew	Goa	Unable to Connect to VPN	3 - Medium	In Progress	Local Support - Atlanta
INC3610278	Hardware: Printer	Phone	Charles Barkley	Philadelphia	Request to add network printer 10:13 AM	2 - High	In Progress	IQTrack Individual Ownership

1 to 4 of 4

Open Incidents (My Group)

21

Open Incidents (My Group)

Number	Category	Channel	Requester	Location	Summary	Priority	State	Assignment group
INC3626835	★ Document Processing: Conversion	Other	Fred Astaire	Atlanta	Convert Word document to PDF	3 - Medium	In Progress	Document Management Support
INC3626172	★ Software: Word: Macro	Email	Andrew Jones	London	Echo Folder	2 - High	On Hold	Information Security

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).

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ASSIGN INDIVIDUAL OWNERSHIP FROM INCIDENT WINDOW

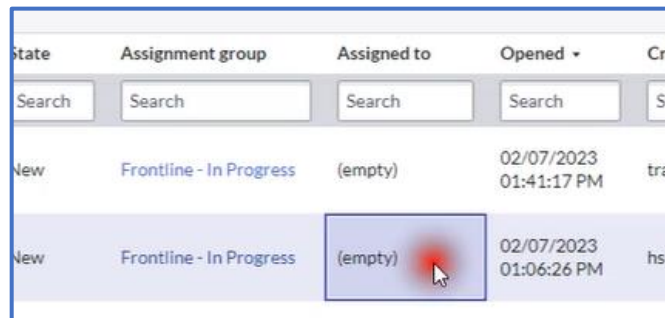
1. Open an Incident
2. Type the analyst's name in the **Assigned to** field, or click the **magnifying glass** to choose an analyst from the list



3. Click **Save**

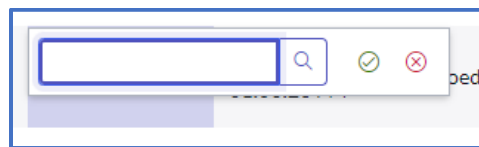
ASSIGN INDIVIDUAL OWNERSHIP FROM LIST

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



State	Assignment group	Assigned to	Opened	Created
New	Frontline - In Progress	(empty)	02/07/2023 01:41:17 PM	trail
New	Frontline - In Progress	(empty)	02/07/2023 01:06:26 PM	hsc

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**

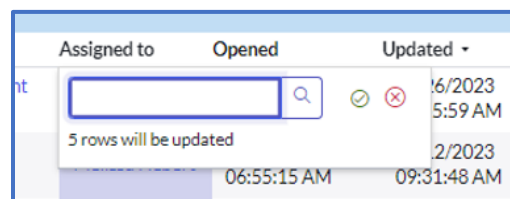
ASSIGN MULTIPLE INCIDENTS AT ONCE

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



Assignment group	Assigned to	Opened
Document Management Support	(empty)	01/09/2023
Information Security	Melissa Hebert	01/06/2023

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



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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

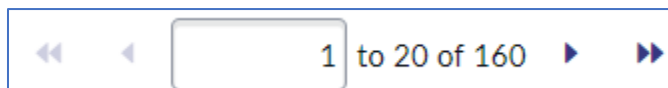
The diagram shows a screenshot of the ServiceNow interface with the following callouts:

- 1**: Menu icon (hamburger menu)
- 2**: Filter icon (funnel)
- 3**: Search bar with 'Incidents' dropdown and 'for text' input
- 4**: Actions on selected rows... dropdown menu
- 5**: 'All' filter button
- 6**: Column headers (Number, Company, Category, Requester, Summary, Priority, State, Assignment group, Assigned to, Opened, Created)

Number	Company	Category	Requester	Summary	Priority	State	Assignment group	Assigned to	Opened	Created
INC3625855	Zurinoni & Vaagner IS/IT	(empty)	Amy Choo	MN0004364 - TEST	3 - Medium	In Progress	(empty)	Lucas Guerino	01/03/2023 03:29:47 AM	Lucas.g
INC3625771	Zurinoni & Vaagner IS/IT	★ Software: Word: Table of Authorities	Adam Ant	Training Incident	3 - Medium	In Progress	ServiceNow Administrators - Zurinoni	Thomas The Trainer	12/28/2022 11:25:45 AM	traine
INC3625760	Zurinoni & Vaagner IS/IT	★ Software: Word: Table of Authorities	Adam Ant	Training Incident	3 - Medium	In Progress	ServiceNow Administrators - Zurinoni	Thomas The Trainer	12/28/2022 08:05:08 AM	traine

	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.

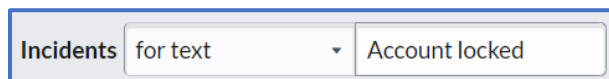


SEARCHING LISTS

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

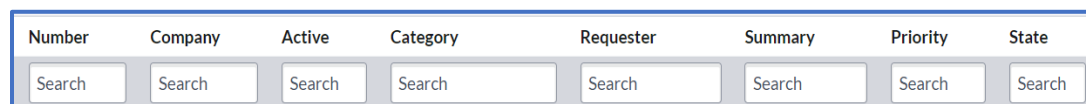


4. Press **Enter**

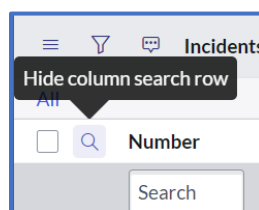
Notes:

Boolean operators are available to use.

There is a column for each search criteria with their own search field. The columns can be sorted.



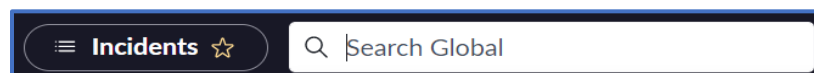
Click the **Show column search row** to enable the search fields.



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 incident and KB numbers.

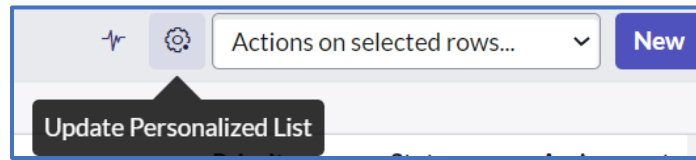


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ADDING AND REMOVING COLUMNS

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

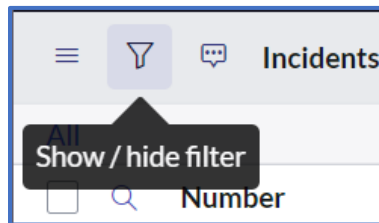
3. Click **OK**

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 

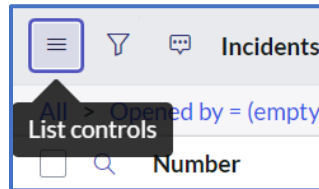
Click the **Add sort** button to specify a sort order for the listed records.

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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**

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SEARCHING THE KNOWLEDGE BASE

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

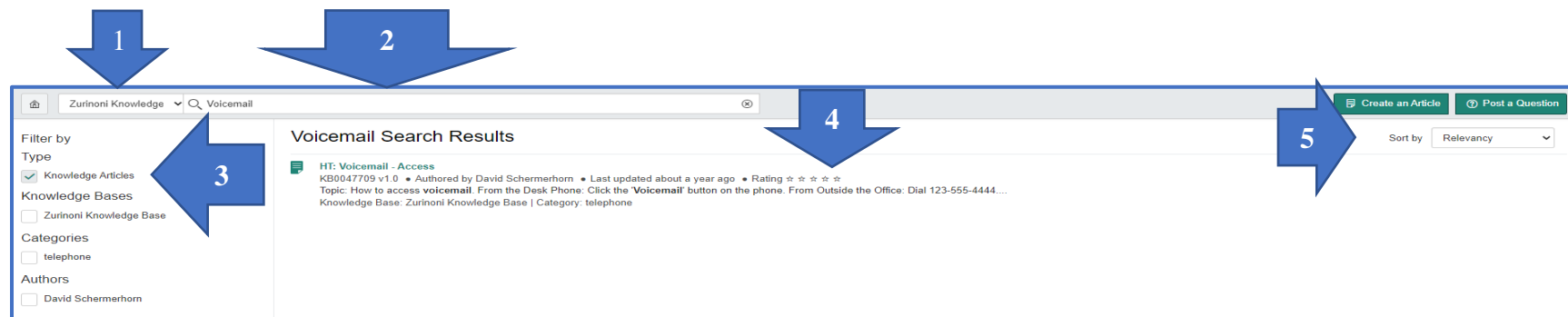
ServiceNow provides a variety of filters and “sort by” options to help locate knowledge base articles.

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

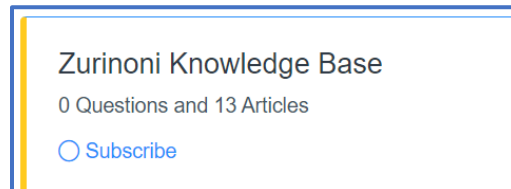
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SEARCHING THE KNOWLEDGE BASE

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
Sort by Options	
Knowledge Base	Last updated Views
Search Results	Relevancy
	Last updated
	Views

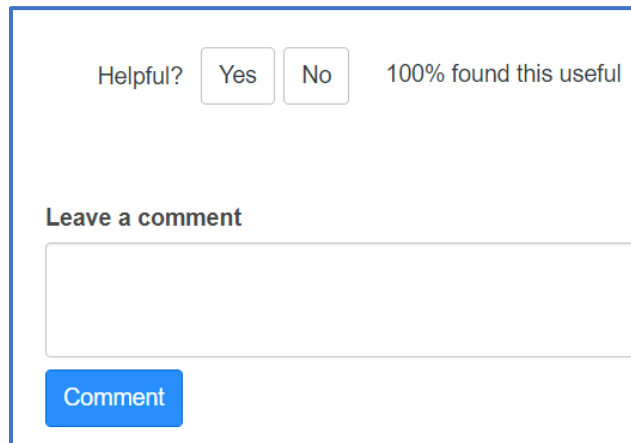
Notes:	Clicking KB links with the middle mouse button opens them in a separate tab.
---------------	--

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.



The screenshot shows a feedback form for a Knowledge Base article. At the top, it asks 'Helpful?' with two buttons: 'Yes' and 'No'. To the right of these buttons, it says '100% found this useful'. Below this is a section titled 'Leave a comment' with a large text input area. At the bottom left of the form is a blue button labeled 'Comment'.