Problem Management

Problem Management is a process that deals with solving the underlying cause of one or more Incidents while the objective of Incident Management is to restore the service as quickly as possible.

The most common mistake is a tendency to treat a Problem like a “big Incident”. The Incident ends when the customer is able to carry on with their job, regardless of whether or not the underlying cause of the Incident has been resolved. Key question to ask is “Can my customer now work?” If the answer is yes, then close the Incident and if appropriate, raise a Problem.

All ServiceNow users with an ITIL role can access Problem tickets through the Problem module.

**NOTE:** the training for the Problem Management Process can be found at https://it.ucsf.edu/pages/problem-management.

View an Existing Problem Record

Users can review open and closed Problem records to become familiar with discovered problems with applications, equipment, systems, etc.

1. From the Navigation Pane, under Problem, click **All Problems**.
2. Click on the Number of the problem record to see further details.

Create a Problem Record

Problem records are created Manually or Automatically.
Note: For information about Automatically or Manually creating Problem records from a Major Incident, please read the Quick Reference Card “QRC - Major Incident and Problem Management” found on https://it.ucsf.edu/pages/problem-management

To Manually create a Problem record from the Problem application:

View Known Errors (Work Around)

A “work around” is a temporary means of resolving and overcoming the symptoms of an Incident.

1. From the Navigation Pane, under Problem, click **Known Errors**.
2. Click on the Number of the problem record to see further details.
1. From the Navigation Pane, under Problem, click Create New Problem.
2. Set the Category (1) to label the kind of problem.
3. Set the Configuration Item (2) to specify the application, equipment, etc. that is the focus of the investigation.
4. Set the Problem State (3) (defaults to Open).
5. Set the Priority (4) [defaults to Low] depending upon a combination of the related Incidents’ severity and impact.
6. Set the Assignment Group (6) to the Technical Expert group that will work on this problem.
7. Set the Assigned To (7) to the Technical Expert person (required when Problem State is not Open or Cancelled).
8. Provide a Short Description (8) (a brief explanation).
9. Provide a Description (9) (a detailed explanation).
10. Enter Work Log (10) notes to document progress.
11. If applicable, add any relevant Attachments (11).
12. Click the Save button.

➢ A Problem record can also be created from an Incident record.

1. Open an Incident record.

2. On the Related Records tab click the “magnifying glass icon” (Lookup using list) next to the Problem ID field.

3. A pop-up window will appear listing Problem tickets. Click the New button.
4. When you complete all required fields, click the Submit and Close button. The newly created Problem record will be linked in the Incident Problem ID field.

Investigate & Diagnose a Problem Record

The Assigned To (7) person collects the Incident and Problem history needed to accurately diagnose the problem and identify a workaround or solution when possible.

1. Set the field Is there a work around? (12) to Yes if there is a known work around available.
2. Provide a Work Around (13) that details a temporary means of resolving and overcoming the symptoms of an Incident. (Required when Is there a work around? is set to Yes.)
3. Provide an Error Message (14) that users see with this problem.
4. Provide a Root Cause (15) that is the fault in the service component that makes the Incident occur.
5. Provide Solutions (16) when a work around is identified and communicated to Service Desk personnel. The Problem Record still remains open until a permanent resolution is implemented.
6. Provide Lessons Learned (17) to assist in future problem management efforts.

➢ To assist with Investigating and Diagnosing a problem, one or more Problem Tasks can be created and assigned to a group/person.

1. At the bottom of a Problem record, locate the Problem Tasks tab.
2. Click the New button to create a new task.
3. Complete required fields in the task and click Save and Close.

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### Request for Change (RFC)

When investigation of a problem leads to a permanent solution such as a patch to software, etc. then link the Change ticket to the Problem ticket.

<table>
<thead>
<tr>
<th>Problem State</th>
<th>RFC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending Change Request</td>
<td>CHG000000</td>
</tr>
<tr>
<td>Priority</td>
<td>Low</td>
</tr>
</tbody>
</table>

1. Set the **Problem State (3)** to Pending Change Request.
2. Set the **RFC (5)** with the Change number.

### Close a Problem Record

Even if a work around is identified, the Problem Record remains open until a permanent solution is implemented and a problem review has been completed.

1. Set the **Problem State (3)** to Closed/Resolved.
   - Note: All Problem Tasks must be closed before saving the Problem as Closed/Resolved.
2. Click the **Save** button.