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About This User Guide

Intended Audience

This user guide is intended for Service Desk Analysts and others who use ServiceNow to manage Incidents, Requests, Changes, and Tasks.

Contact Us

The following sections provide support information for the ServiceNow application.

Subject Matter Expert

Each department using ServiceNow has one or more Subject Matter Experts (SME) assigned. The SME is your first level contact for questions or to report problems. Check with your manager to determine the name of your ServiceNow SME.

General Support

- Enterprise IT Service Desk  
  (415) 514-4100  
  ITServiceDesk@ucsf.edu
- Rebecca Nguyen, ITSM Product Manager  
  (415) 476-6748  
  rebecca.nguyen@ucsf.edu
- Ed Martin, Deputy Director, SaaS Platforms  
  (415) 476-5400  
  MartinE@medsch.ucsf.edu
Chapter 1

Getting Started

Introduction

ServiceNow is the UCSF Enterprise IT Service Management ticketing system. The platform is provided as a Software as a Service (SaaS).

Supported Browsers

- Firefox (1.5 and up) for Windows, Mac, and Linux
  Firefox is the recommended browser for the best speed and user experience.
- Safari (3.0 and up) for Windows, Mac
- Production versions of Google Chrome for Windows, Mac
- Internet Explorer (6 and up) for Windows
- Internet Explorer 8:

  Note:

  To ensure the proper response from ServiceNow when using IE 8, you need to enable “Compatibility View”.

  1. Navigate to the UCSF ServiceNow website [see “Log In” section of this document].
  2. From the Tools menu, select “Compatibility View Settings”.

![Tools Menu with Compatibility View Settings highlighted]
3. From the “Compatibility View Settings” window, enter the domain servicenow.com (if it’s not already there) and click the Add button. Close the window.

![Compatibility View Settings](image)

Log In

ServiceNow is using the UCSF single sign-on tool MyAccess, for authentication.

Log in to ServiceNow by:

- Opening a supported browser and enter the URL [https://servicenow.ucsf.edu](https://servicenow.ucsf.edu).
- On the Login screen, type in your AD username and password or your MyAccess username and password.

Note:

If you do not want to type in your username each time, check the **Remember me** option.

Upon login, please make sure you disable your browser’s pop-up blocker for the ServiceNow site. This only needs to be done once.
Understanding the User Interface

The primary user interface is divided into three areas.

Banner Frame

The banner frame is located across the top and provides the following information and global navigation controls.

- Welcome message shows the name of the currently logged in user.
- Logout returns to the Welcome page for subsequent login.
- Homepage icon provides links to selectable application homepages.
- Print icon opens a printable version of the current content frame.
- Help icon opens the IT ServiceNow Project site (documentation) in another window or tab.
- Search text box is where you can quickly search the records of the entire active database.
- Header Expand/Collapse icon alters the amount of space the banner frame occupies.
Application Navigator

An Application is a grouping of modules, or pages, that provide related information and functionality. For example, the incident application contains modules for creating and viewing incidents; the configuration management application contains modules for configuring servers, databases, and networks.

The Application Navigator, or left-navigation bar, provides links to all applications and the modules they comprise, enabling users to quickly find information and services. The hide button icon in the banner frame can be used to hide the application navigator.

The Application Navigator header appears above the application list.

It provides these tools:

- **Navigation Filter**—filters the applications and modules that appear in the navigator based on the filter text. To filter:
  1. Click Type Filter Text in the Application Navigator header.
  2. Begin typing the filter text (for example, type inc for Incidents). The list of items available in the Application Navigator is filtered as you type.

- **Decrease Font Size** icon and **Increase Font Size** icon changes the font size on all pages and menus.

- **Refresh Navigator** icon refreshes the list of applications and modules.

- **Collapse All Applications** icon and **Expand All Applications** icon collapse all applications so that only application labels appear, or expand all applications so that all available modules underneath the application labels appear.

- **Switch Perspective** icon filters the available items by role (for example, select ITIL to show only ITIL items such as Incidents, and filter out Asset Management items such as Asset Portfolio). You must have access rights to the items to see a perspective in the list. To see all available applications, click the arrow and select All.

Content Frame

The main area of the primary user interface is the content frame. The content frame displays pages to which a user navigates. Many types of pages are displayed in the content frame, including:

- **Homepages**—provide easy access to commonly used functions or information. Users and administrators can customize homepages using the “Add content” link.

- **Lists**—display information in a table, such as Incident and Change tickets.
- **Forms**—to create or modify an individual record/ticket.

- **Service Catalog**—provides a view of the catalog items available to customers. It is similar to a homepage, where each gauge is a category of catalog items.

### Common ServiceNow Icons

Several common icons appear through the system. Become familiar with them so that you can take advantage of quick access to additional information and functionality.

- **Homepage icon** displays your primary homepage when clicked. When you point to the icon it displays a list of pages identified as homepages for different applications.

- **Reference icon** appears in lists and forms. Hover over the icon to display a pop-up box showing detailed information about the associated record. Click the icon to open the associated record in form view.

- **Reference Lookup icon** appears in forms beside reference fields (fields that contain data from a different table). Click the reference lookup icon to display a pop-up box listing records on the referenced table.

- **Choose Date icon** when clicked provides a pop-up calendar to select a date/time.

- **Previous icon** and **Next icon** appear on forms. Use these icons to move up (previous) or down (next) one record at a time.

- **Toggle Tabs icon** appears on forms with more than two sections or more than one related list. Click this icon to toggle between showing the sections and/or related lists in tabbed format or as a single, scrollable page.

### Form Elements

A form displays complete information for one record. Most forms in ServiceNow are similar in appearance, but the specific information displayed depends on the application.

**Title Bar**

The title bar displays the title of the form (table) and provides various controls.
Back ( )—navigates to the previously viewed page.

Form context menu – appears when your cursor hovers on the green back arrow ( ) beside the form title or right-clicks the title bar.

Submit and Close – saves the new record into the database and returns to the previously viewed page.

Save and Close – saves changes to an existing record and returns to the previously viewed page.

Save – saves changes and stays on the record.

Auto Assign – sets the Assignment Group based on the administrator managed routing table. Visible to service desk users on the Incident application only.

Attachments ( )—allows you to view and add attachments to the record.

Email ( )—opens an email message regarding the information in the open Incident. (Not available in all applications.)

Previous ( ) and Next ( )—open the previous and next record on the list from which the record was accessed.

Toggle tabs ( )—toggles between tabbed and sequential arrangements of related lists and form sections.

Expand/Collapse ( )—expands or collapses all sections or the current section of the form.

Form Context Menu

The form context menu appears when your cursor hovers on the green back arrow ( ) beside the form title or if you right-click on the title bar. It provides controls based on the table and your access rights.

Available options include:

- Save—saves changes without leaving form view.
- Templates—allow for creating/applying templates.
- Export—exports data to PDF.
- Copy URL—copies to the clipboard the URL for the form view of the record. Follow browser instructions if browser security measures restrict this function.
- Reload Form—reloads information from the database to refresh the form view.

**Field Types**

A field represents an individual data item on a record. You can view and modify fields on a form. Field types are described below:

- Mandatory—requires a value before saving the record.
- Read-only—field is light grey and value may not be edited.
- Standard data entry—accepts values such as numbers, text, choice lists, dates and times, and check boxes.
- Specialized data entry—accepts one or more of the following:
  - Journal – permits text entry. When the record is saved, journal field entries are listed under the Activity field, marked with the user name and timestamp (example, **Work Log** on Incident and Change).
  - Reference – lets you select a record on another table (example, in Incident, the **Customer** field references the User table). Reference fields define a relationship between two tables.
  - Duration—permits entering a length of time. The field automatically converts hours to days for values greater than 24 hours. For example, 30 hours is converted to 1 day and 6 hours.

**Field Status Indicator**

A field status indicator is a colored bar that may appear next to form fields or sections.

- Red: **Mandatory**—required field that is empty. You must enter a value to save the form.
- Light Red: **Populated Mandatory**—required field for which a value has already been saved in the database.
- Green: **Modified**—contains data that has not been saved.
- Orange: **Read-only**—user cannot edit this field on the form.

**Field Features and Action Buttons**

Some fields have special features or action buttons as described below:
- Type-ahead suggestions – Any field that has a magnifying glass next to it (Lookup/reference) may have a value entered using **Type-ahead**. Place the cursor in the field and start typing a value. A list of values begins to appear.

```
App/Business Service: b
Big Fix
Bindview
BIS
```

- Incorrect Value – When typing a value in a Lookup/reference field, if you type a value that does not exist in the reference table, the field will display with a red dash underline. You will not be able to save the record until this field is filled with a correct value.

```
Assigned to: Barack Obama
```

- Lookup using List (Reference) – ( ) Any field with a magnifying glass next to it is a Lookup (reference) field. This field value is set based on values that exist in a related table (User, Assignment, Work Site, etc.). Clicking the Lookup icon will display a List view of the reference table. You may sort the list (click column name) and search the list by typing in the Go to field. Clicking a value in the list will populate it in the corresponding field.

```
Configuration Items
Name | Device Type
--- | ---
Access | Application
Access Point | Business Service
accessANYwhere | Application
Account Fund Profile (APP) | Application
Account Request Form (ARF) | Application
Accreditation DB | Application
```

- Hover Icon – ( ) Placing the cursor over the Hover icon will display a pop-up of more detailed information about the value of that field.
Note:
Clicking on the Hover icon will take you to the record of the referenced field value.

Sections (Tabs)
Sections provide headers for a group of related fields.

- To expand or collapse a section or journal field, click expand (.expand) or collapse (.-) in the section or field header.
- To toggle between viewing tabbed or a sequential arrangement of sections, click Toggle tabs (.-) in the title bar.

Understanding Roles and Homepages

Roles
A Role is a category that can be assigned to a group or user, and can be granted access to particular parts of the system. Once access has been granted to a role, all of the groups or users assigned to that role are granted the same access. Roles can also contain other roles, and any access granted to one role will be granted to any role that contains it.

ServiceNow offers multiple roles that fall into three general classifications:

1. **Administrator** - ServiceNow administrators can configure the system in many different ways to address an organization's business needs. They can set up any of the processes provided with ServiceNow, as well as assigning the roles with access to each.

2. **ITIL User** - IT support staff uses ServiceNow to track the processes that fulfill service requests. Depending on your specific role and system setup, additional functionality and processes may also be available. Users granted the ITIL role can perform standard actions for an IT helpdesk technician.

3. **Employee Self-Service User** - Most employees are self-service users, also called ESS users. They can make requests such as ordering a computer, log incidents such as a service interruption, search the knowledge base, and view articles through a user-friendly website called the Employee Self-Service Portal (ESS Portal) or through the self-service application in ServiceNow.
**Homepages**

When a user logs into ServiceNow, they’ll see the default homepage for their role (admin, itil, etc.). If the user has a personalized homepage, they’ll be taken immediately to their homepage instead.
Chapter 2

Using Lists

Lists display information from a data table. Users can search, sort, filter, and edit data in lists. Lists also may be embedded in forms and may be hierarchical (have sublists).

The list interface contains four main elements:

- Title bar
- Breadcrumbs
- Column headings
- Fields

A response time indicator ($) may appear at the bottom right of some lists to indicate the processing time required to display the list.

![List Interface Diagram]

Title Bar

The title bar displays the title of the list (table) and provides the following controls:

- Title menu – appears when you click the arrow beside the list title. It provides the following list controls:
- **Refresh List** – refreshes the list to show changes immediately.
- **View** – changes the columns and order of the list to a predefined layout.
- **Filters** – applies a saved filter.
- **Group By** – aggregates records by a field.
- **Show** – changes the maximum number of records per page
- **New** – opens a blank form that allows user to create a new record in the list.
- **Go to** or **Search** – finds information in the current list. To learn more, see the “Finding Information in Lists” section of this document.

**Breadcrumbs**

Breadcrumbs offer a quick form of filter navigation. A filter is a set of conditions applied to a table in order to find and work with a subset of the data in that table. The current filter is indicated by a hierarchical list of conditions-breadcrumbs-at the top of the table. To learn more, see “Using Filters and Breadcrumbs” section of this document.

**Column Headings**

Column headings display column names and provide the following controls:

- **Sorting** – Click the column name to sort the list in ascending order. Click again to sort in reverse order. Sorting is not available on time fields such as Duration.
- **Right-click menu**, also called **context menu** – offers these controls:
  - **Sort (a to z) and (z to a)** – sort in ascending and descending order.
  - **Group By** – aggregates records by a field. To learn more, see the “Finding Information in Lists” section of this document.
- Bar and Pie Chart—create quick bar and pie chart reports based on the filter criteria of the list. You can modify these reports or create gauges (depending on access rights).
- Personalize (requires access rights)—provides administrative functions related to the information displayed and how it is controlled.
- Export—exports data to Excel, CSV, XML (administrators only), or PDF.
- Update Selected and Update All (administrators only)—change applicable field values.
- Import XML (administrators only)—import data from an XML file.
- **Personalize List (🌟)**—customize the list layout for the current user. To learn more, see “Creating Personal Lists” section of this document.

**Fields**

Fields display data and provide the following functionality:

- **Links** – Click the reference icon or first column field to open the record in form view. Links to related records are also available.
- **Editing** – changes the information in one or more records. To learn more see the “Editing Lists” section of this document.
- **Reference Icon 🌟** - provides detailed information about the record. Point to the reference icon to open a pop-up window, or click it to open the record in form view.
- Right-click menu, also called context menu – offers the following options:
  - **Show Matching** and **Filter Out** – provide quick filter options.
  - **Copy URL to Clipboard** – copies to the clipboard the URL for the form view of the record. Follow browser instructions if browser security measures restrict this function.
  - **Assign to me, Approve, and Reject** – provide quick edit options.
Using Filters and Breadcrumbs

Breadcrumbs

Breadcrumbs offer a quick form of filter navigation. They are ordered from left to right, with the leftmost condition being the most general and the rightmost condition being the most specific. Clicking a breadcrumb removes all of the conditions to its right. Clicking the condition separator (>) before a condition removes only that condition.

In the example, clicking *Priority = 2* removes the condition *Category = Software* and returns all active incidents with a priority of 2. By contrast, clicking the condition separator (>) before *Priority = 2* removes the condition *Priority = 2* and returns all active incidents in the software category. In both cases, removing a condition returns a larger result set.

Finally, clicking *Incidents* goes to the top of the hierarchy, removing all conditions and returning all incidents in the system.

Additional navigational functions are available. Right-click a breadcrumb and select:

- **Open new window** – opens the results list for the breadcrumb in a new tab or window.
- **Copy URL** – copies to the clipboard the URL for the results list of the breadcrumb. Follow browser instructions if browser security measures restrict this function.
- **Copy query** – copies to the clipboard the encoded query for the breadcrumb. This selection is not available for All breadcrumb. Follow browser instructions if browser security measures restrict this function.

Quick Filters

To quickly filter a list by a value in a field, right-click and select **Show Matching** of **Filter Out** (for date fields choose from **Show Before**, **Show After**, and **Filter Out**). These functions add a condition as a rightmost breadcrumb of the current filter.
In this example, right-clicking **Active** and select **Show Matching** adds the condition \( \text{Incident state} = \text{Active} \) as the most specific condition of the filter. By contrast, right-clicking **Active** and selecting **Filter Out** adds the condition \( \text{Incident state} \neq \text{Active} \) as the most specific condition of the filter.

### Creating Filters

When a filter is applied, only items that meet the conditions are returned. A condition consists of three parts: a field, an operator, and a value. The illustration shows a filter with two conditions: **Active is true** and **Priority is high**. This filter displays all active incidents with a high priority.

To create a filter:

1. Open the Smart Filter condition builder by clicking the arrow ( mạch) beside the breadcrumbs.

Select a **field** from the drop-down list.

The field type determines the available operators and values. For example, the Priority field may have a value of Critical, High, Moderate, or Low, while a text field may have many different values. Similarly, the “greater than” operator does not apply to the Assigned to field, but it does apply to the Priority field.

Select an **operator** from the drop-down list.

Select or enter a **value**, if appropriate.

Add or remove conditions until the desired filter is constructed:
To add a top-level condition, click **Add AND condition** (>Add<) or **Add OR condition** (>+<) on the Smart Filter tool bar, above the conditions.

To add a dependent condition, click **Add AND condition** or **Add OR condition** beside the condition.

To remove a condition, click **Delete** (>Trash<) beside the condition.

To specify the sort order of the results, click **Add Sort** (>Add<), then select a field to sort by and a sort order.

Click **Save Filter** to keep the filter for future use. To learn more, see **Saving Filters** in the next section below.

Click **Run** (>Run<) to apply the filter.

**Saving Filters**

Depending on your role, you may save filters for everyone, a user group, or yourself.

1. Create or modify a filter.

Click **Save Filter**.

Enter a name for the filter in the **Save as** field.

Select who the filter is **Visible to**:

- To create a personal filter (available to all roles), select **Me**.
- To create a global filter (role-based availability), select **Everyone**.
- To create a filter for a specific user group (role-based availability), select **Group** and then enter or search for the group name.

Click **Save**.

**Using Saved Filters**

To apply a saved filter, select the filter name in the title menu. The filter runs and the breadcrumbs appear.
To edit your personal filters, select **Edit personal filters** from the title menu. The Filter table (with the filter *User = [current user]*) opens. Filters created from this view are saved as personal filters for the current user.

**Deleting Filters**

To delete a personal saved filter:

1. Navigate to **System Definition > Filters**.
   - To see who created the filter and when, personalize the list to add the *created_by* and *created* fields.
   - To see who has access to the filter, personalize the list to add the *user*, *group*, or *domain* fields. Filters that are not assigned to a user or group are global.

   Click the filter name and click **Delete**, then confirm the request.

**Creating Personal Lists**

Personal lists modify a specific list view according to individual preferences. Users can create personal lists. Administrators can manage the personal lists function.

Personal list layout options include:

- Column selection and order
- Row spacing
- Text wrapping
- List editing
**Personalizing a List**

To personalize a list:

1. Open the list.

Click **Personalize List** ( ) in the upper left corner.

Use the slushbucket to select the columns and the order in which you wish them to appear.

   The first non-reference field automatically links to the form view of the record. For this reason, consider using the record number as the first column in your personal list layout.

Select display options.

   - To display long text on more than one line, select the **Wrap column text** check box. Clear the check box to display text on one line.
   - To condense the vertical space between rows, select the **Compact rows** check box. Clear the check box to use standard row spacing.

Select list editing options (requires setup).

   - To allow the list editor to open for the list, select the **Enable list edit** check box. Clear the check box to prevent the list editor from opening for the list.
   - To open the list editor with a double-click, select the **Double click to edit** check box. Clear the check box to open the list editor using a single click.

**Note:**

If you do not want to type in your username each time, check the **Remember me** option.

   - To reset a list to the default layout, click **Personalize List** ( ) and select the **Reset to column defaults** check box.
   - If a list is personalized, an indicator ( ) appears in the upper left corner.
Finding Information in Lists

Users can quickly find information in a list by searching, sorting, and grouping the list.

Searching a List

The list title bar includes options for searching the list. A drop-down list lets you indicate whether to search a specific field only (Go to), or to search all fields in the record (Search).

To use the Go to or Search field on the title bar:
1. Select a field (for Go to) or select for text (for Search).
2. Enter the search text and press Enter or click Search ( ).

- **Go to** - for most fields, sorts by the selected field and returns records where the field value is equal to or greater than the search term. For Number fields, finds the records where the field value ends with the value entered.

- **Search** - returns records that contain the search term in any field.

List searches support wildcard searches. To learn more, see “Wildcard Searches” section of this document.

Sorting a List

To sort a list, use one of the following methods:
1. Click a column name to sort the list in ascending order. Click again to sort in reverse order.
2. Right-click a column name and select Sort (a to z) or Sort (z to a) to sort in ascending or descending order, respectively.
3. Specify a sort order with a filter. Filters provide for sorting by more than one column (for example, by Category and then Subcategory). To learn more, see the “Using Filters and Breadcrumbs” section of this document.
The current sort order is indicated by an arrow next to the column name (▲, up for ascending and down for descending). Only the primary sort order is indicated.

**Grouping Items in a List**

Grouping aggregates a list by a field and displays the record count per group. Grouping can help users find data quickly by organizing and providing a summary of search or filter results. For example, this picture shows active incidents grouped by caller.

To group items in a list, use one of these methods:

- On the title bar, click the title menu and select Group By. Select the field by which to group the list. To remove a grouping, select -- None --.
- Right-click the column name and select Group By. To remove a grouping, select Ungroup.

To use a grouped list:

- Groups are named the values of the field selected for grouping.
- Record count per group appears next to the group name.
- (Lists original) The total number of items in the list (all groups) appears next to the list name at the top of the list.
- To expand or collapse a group, click the arrow (▲) next to the group name.
- To expand or collapse all groups, click the arrow at the top of the list.
- To open the full list for a group, click the group name.
- The maximum number of records shown per group is the number of records per page in list view.
  - To see all records for a given group, open the full list.
  - To change the number of records per page, click the title menu and select Show.
- The maximum number of groups shown is 100 by default, but may be configured by an administrator.

### Editing Lists

Users can edit data in lists using a variety of methods:
- **Quick edit functions** - change applicable field values using the right-click menu.
- **List editor** - edit field values in a list without opening a form.
- **Multiple records** - edit more than one record at the same time using the list editor or an editing form.

### Quick Edit Functions

To edit a record in a list using quick edit functions, right-click a field and select the appropriate function:
- **Assign to me** - for records that use assignments, adds the logged in user's name into the Assigned to field
- **Approve** - for records that use approvals, changes the record's approval state to Approved
- **Reject** - for records that use approvals, changes the record's approval state to Rejected

### Using the List Editor

The list editor allows users to edit field values directly from a list without navigating to a form. The list editor is only available on fields and tables configured by the Administrators.

To use the list editor:

1. Double-click in an empty area of the field. The appropriate editor for the field type opens.
   - Before the list editor opens, access rights to edit the field are verified. A loading indicator appears if this process takes longer than expected.
   - If the field has a dependency relationship (for example, Category and Subcategory), then a composite editor opens to allow editing of all dependent fields. You must have rights to edit all dependent fields to use the list editor.

Enter the appropriate values and click **Save** (✔), or click **Cancel** (✘) to retain the original value.
Editing Multiple Records

Users can edit multiple records at the same time using the list editor. If you wish to update a single field on multiple records to have the same value, the list editor is the quickest method.

To edit multiple records in a list using the list editor:

1. Select the records you wish to edit:
   - To select multiple consecutive fields, hold **SHIFT** and **drag** in the desired fields, or select a cell and then press **SHIFT + UP ARROW** or **SHIFT + DOWN ARROW**.
   - To select multiple non-consecutive fields, press **SHIFT** and click in one of the desired fields, then hold **SHIFT + CTRL** (**SHIFT + Command**, Mac), and **click** in the desired fields.

Open the list editor by double-clicking (or clicking, depending on setup) in an empty area of the field.

- The number of selected rows that will be edited is indicated. If any rows cannot be edited (due to security constraints), that is indicated.

Enter the appropriate values and click **Save**.
Chapter 3:

Search in ServiceNow

Searching in ServiceNow can be performed in several places, depending on your current needs and the type of search. Use any of the following searches to find information in ServiceNow:

- **Global Text Search** - find records in multiple tables from a single search field.
- **Knowledge base Search** – find knowledge articles.
- **Lists Search** – find records in a list; search in a specific field (Go to) or in all fields (Search).
- **Navigation filter** – filter the items in the application navigator.

Using Global Text Search

Global text search finds records in the multiple tables from a single search field. To perform a global text search, click in the search box (located in the upper right of the banner frame).

Search results are grouped into logical collections called search groups. Users can search the groups for which they have access rights. Within each search group, results are divided by table. The default search groups are:

- **Tasks**: e.g., Incidents, Change Requests, Problems, Requests
- **People & Places**: e.g., Users, Groups, Locations
- **Knowledge & Catalog**: Knowledge Base and Service Catalog

Knowledge and Service Catalog results are displayed as they are in their respective applications, while other results are displayed in list format.
Search Suggestions

The knowledge base and global text searches provide suggestions as you type. Type-ahead suggestions appear under the search box in the upper right of the banner frame. Suggestions are based on similar searches that begin with the same characters.

Deselect Results

If you do not want to search some groups or tables, you can deselect a search group or table on a per-user basis. Your preference is saved for subsequent searches. To deselect a search group, uncheck its checkbox on the search result page:
If you click a search group’s link (e.g., the blue “Tasks” link in the above screenshot), you will get a dialog where you can deselect specific tables in each group:

**Searching the Knowledge Base**

You can search the knowledge base for specific articles or topics. Using the knowledge base text search, you can filter, organize, and refine search results. Using advanced search, you can filter your search results by topic, category, search location. You can also search the knowledge base directly from forms by using the knowledge icon.

To search the knowledge base:

1. X
2. Xx

**Finding Information in Lists**

Users can quickly find information in a list by searching, sorting, and grouping the list. More information about list can be found in “Using Lists” section of this document.
Using the Navigation Filter

The navigation filter helps users quickly access information and services by filtering the items in the application navigator. More information about Navigation Filter can be found in the “Application Navigator” section of this document.

Advanced Searching Options

Use any of the following advanced search options for more specific queries:

- **Wildcards**: use symbol to represent zero or more characters.
- **Phrase searches**: find a phrase with multiple terms.
- **Go to options**: control the query for lists searches of a specific field.
- **Boolean operators**: refine searches with operators such as AND and OR.
- **Attachment searches**: search in files that are attached to records.

Wildcard Searches

Wildcards are available for three types of searches.

To perform a single character wildcard search, use the percent (%) symbol. This wildcard finds terms that contain any one character to replace the question mark. For example, to find text or test, search for:

t*e?t

To perform a multiple character wildcard search, use the asterisk (*) symbol. This wildcard finds terms that contain 0 or more characters to replace the asterisk. For example, to find planned or placed, search for:

pl*d

Note:

You cannot use an asterisk (*) or question mark (?) symbol as the first character of a search.

Phrase Searches

Use quotation marks to search for a phrase with multiple terms. Phrase Searches finds only matches that contain the exact words in the exact order you specify, ignoring stop words (common words that are excluded from searches) and punctuation. For example, the following searches return the same results because the stop word a is ignored:
“email password”
“email a password”

Note:

Wildcards do not work within quoted phrases; they are ignored as punctuation.

Go To Options

You can use Go to for list searches of a specific field. For most fields, Go to uses a greater than query by default, meaning that it first sorts the records on the selected field, then finds the first record that starts with the text and all following records. For Number fields, Go to uses an ends with query by default, meaning that the search finds all records where the number field ends with the entered number.

Use the following options to control the Go to query:

- *searchterm or %searchterm%: use a CONTAINS filter for "searchterm"
- %searchterm: use an ENDSWITH filter for "searchterm"
- searchterm%: use a STARTSWITH filter for "searchterm"
- =searchterm: use an EQUALS filter for "searchterm"

Boolean Operators

Boolean operators combine search terms with logic operators. The following searches support boolean operators:

- Global text search
- Knowledge base
- Lists (text searches of all fields)

For these searches, the AND operator is applied by default, which means if no Boolean operator is entered between two terms, the AND operator is used. For knowledge base searches, if the AND search returns poor results, the search is automatically re-run with the OR operator.

<p>| OR or vertical bar symbol (|) | Finds a match if either of the terms exist in a document (a union using sets). For example, to find documents that contain either &quot;email password&quot; or just &quot;email&quot;, search for: |
|---|---|
|    | &quot;email password&quot; OR email |
|    | or |</p>
<table>
<thead>
<tr>
<th><strong>AND</strong></th>
<th>Finds a match if both terms exist in a document (an intersection of sets). For example, to find documents that contain &quot;CPU load&quot; and &quot;10 minutes&quot;, search for:</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;email password&quot;</td>
<td>email</td>
</tr>
<tr>
<td>&quot;CPU load&quot; AND &quot;10 minutes&quot;</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>NOT, minus (-), or exclamation point (!)</strong></th>
<th>Excludes documents that contain the term after NOT (a difference of sets). For example, to find documents that contain &quot;CPU load&quot; but not &quot;10 minutes&quot;, search for:</th>
</tr>
</thead>
<tbody>
<tr>
<td>NOT, minus (-), or exclamation point (!)</td>
<td>&quot;CPU load&quot; NOT &quot;10 minutes&quot;</td>
</tr>
<tr>
<td>&quot;CPU load&quot; -&quot;over 10&quot;</td>
<td></td>
</tr>
</tbody>
</table>

The NOT operator cannot be used with just one term. For example, the following search returns no results:

NOT "10 minutes"

NOT must be a stand-alone word. For example:

atom NOT ion excludes the term ion

NOTION searches for the term notion

Minus and exclamation point must immediately precede the excluded term. For example:

email !Joe Excludes Joe

e-mail ! Joe Includes Joe.

### Searching for Attachments

Searches return matches in attachments when the attachment indexing option is enabled for the table you are searching. By default, this option is enabled for the knowledge base. Administrators can enable or disable this option for any table.
Chapter 4:

Reports

Reports allow users to generate charts from any data in the database. Reports can be used as homepage or content gauges, published to a visible URL, or scheduled to be run and distributed at regular intervals. Generate reports from Reports > View / Run.

You can generate pie and bar charts directly from a list by right-clicking a column header. For example, in the Incident list, right-click Category and select Bar Chart. A chart displaying the distribution of categories for incidents in the list appears.

Running Reports

Reports can be accessed through the left navigation bar. Use one of the following methods to navigate to reports:

- In the application navigation (left side) expand the application “Reports” and click the module “View / Run”; or
- In the navigation filter (“Type filter text” box), type the application name “rep” and click the module “View / Run”.

![Bar Chart Example](image-url)
View / Run Module

The View / Run module takes you to the main Reports window. Reports are grouped by:

- **Global Reports** - Certain common reports are stored as global reports, accessible from the View / Run module under the Reports application. Selecting any of the global reports will open the Run Report page with the global report's information already filled in. Selecting 'new' report also displays the Run Report page, but with the fields blank.

- **My Saved Reports** - If you modify an existing Global or Group report (and Save with “Visible to” = Me), your saved report will save under the My Saved Reports section.

- **My Groups Reports** - The reports listed here are visible to only your group. The Parent group may be used (such as ITS or Medical Center IT) or a specific assignment group.

Run Report
The run report page allows you to tailor reports of different types, using different data. From here, the report can be scheduled to be re-run and emailed at regular intervals, published to a visible URL, transformed into a homepage or content gauge. For more information, view “Report Types” section of this document.

Report Types

These are the most common types of reports that are generated:

- Pie Charts
- Bar Charts – Vertical and Horizontal
- Lists
- Pivot Tables

Other types of available reports are: Box Charts; Calendars; Control Charts; Histograms; Line Charts; Pareto Charts; Trend Charts; Trendbox Charts

Creating Reports

It is recommended that you consider creating a new report by just modifying an existing report. To create a new report:

1. From the left navigation pane, select Reports > View/Run.
2. Click the button at the top of the list
3. Define the parameters of the report
4. Click the Save or Insert Button
**Note:**

When saving a report, avoid characters such as `&`, `;`, or `,'.

**Editing an Existing Report**

To edit an existing report:

1. From the left navigation pane, select **Reports > View/Run**
2. Open a report from the list
3. Adjust any parameters as needed
4. Save the report, and then return to the report list
   - **Update** - Overwrite initial report, returning to the report list
   - **Save** - Overwrite initial report, staying on the report form
   - **Insert** - Create a new report. Be sure to change the name

**Creating a Reports from a List**

You can generate adhoc style reports directly from a List:

1. Navigate to the list for which you want to create a report
2. Right click on the column header you want to group your report by
3. Select **Pie Chart** or **Bar Chart** from the drop-down menu
4. Click the `X` icon to the left of the **Reports** link
5. Save the report:
   - **Update** - Overwrite initial report, staying on the report form
   - **Save** - Overwrite initial report, returning to the report list
   - **Insert** - Create a new report. Be sure to change the name, and then return to the report list

**Exporting and Saving Reports**

**List** reports may be exported in three formats Excel, CSV, PDF. Right-click on a column header and select Export.

**Pie, Bar, Pivot** reports may be saved by:

- Right-clicking on the image and selecting “Save Image as”; or
- Copy to a screen capture program; or
- Highlight values (pivot) and copy to Excel.
Chapter 5:

User Notification Preferences

ServiceNow will, by default, send you email notifications of ticket assignments. You can add a Pager notification as well as turn off/on the standard email notifications.

Navigating to My Profile

You can navigate to your User Profile, using one of these methods:

- In the application navigation (left side) expand the application “Service Desk” and click the module “My Profile”; or
- In the navigation filter (“Type filter text” box), type the application name “prof” and click the module “My Profile”.

Setting your Notification Preference

You can turn on or off a notification. To turn on or off a notification:

1. Navigate to your User Profile. From the left navigation pane, select Service Desk > My Profile.

Select the Notification Preferences link under Related Links.
Select the radio buttons to turn your subscriptions on or off and click Save.

**Setting up a Pager Notification**

To add a Pager notification:

1. Navigate to your User Profile. From the left navigation pane, select Service Desk > My Profile.

2. Locate the Notification Devices tab and select New. The Notification Device form will open.

3. In the Name field, enter “USAM – <your name>”.

4. In the Type field, select Email.

5. In the Email address field, enter the email address for your pager (e.g., 415443xxxx@archwireless.net).

6. Click the Submit and Close button. You will return to your User record.
7. Locate the Notification Messages tab and select New. The Notification Messages form will open.

8. In the Name field, enter “USAM – Inc Assignment”.

9. In the Notification Message field, select Incident assigned to me.

10. In the Device field, select USAM - <your name>.

11. In the Advanced filter field, select the checkbox.

12. In the Conditions field, configure the condition in which you want the notification to be sent. For example, Priority is one of 1-Critical and 2-High.

13. Click Submit and Close button.
Chapter 6:

Working with Incidents

The ServiceNow platform supports the Incident Management process with capabilities to record incidents, classify according to impact and urgency, assign to appropriate groups, escalate, and manage through to resolution and reporting.

Navigating to Incident Application

To work with Incident, you will use the Service Desk application. Use one of the following methods to navigate to the Service Desk application:

- In the application navigation (left side) expand the application “Service Desk”.
- In the navigation filter (“Type filter text” box), type the application name “Service Desk”.

Service Desk Modules

The Service Desk application provides commonly used modules for users to manage their work:

- **Homepage** – Opens the ITIL Homepage.
- **Create New Incident** – Opens a new Incident Ticket Form.
- **Customers** – Opens the Users table listing customer user records.
- **Incidents** – Opens the Incident table in list view. Displays all Incidents.
- **My Queue** – Opens the base Task table in list view. Displays all open tickets [incident, change, request items] that are assigned to you.
- **My Team Queue - All** – Opens the base Task table in list view. Displays all open tickets [incident, change, request items] that are assigned to your assignment group(s).

- **My Team Queue - Unassigned** – Opens the base Task table in list view. Displays all open tickets [incident, change, request items] with no “Assigned to” value that are assigned to your assignment group(s).

- **Dashboard** - Opens the Incident Overview.

- **My Approvals** – Displays all approvals assigned to you as approver.

- **My Profile** – Opens your User record.

### Create a New Incident

To create a new Incident:

14. Perform one of the following options to navigate to the Incident form.

- In the application navigation (left side) expand the application **Service Desk** and click the module **Create New Incident**; or

- In the navigation filter (“Type filter text” box), type the application name “inc” and click the module **Create New Incident**

15. In the **Customer** field:

- Type a few letters of the customer’s name to display a list of possible matches. Press Tab or Enter to select a name.

- Alternatively, search for a name by clicking the reference lookup icon.

**Note:**

If you are creating an Incident for a customer that is outside the UCSF customer base, you can use the customer name **External Customer**.

- Using External Customer adds two required fields Actual Name and Callback number. A third optional field Non-UCSF Email is also available.

- If an email is entered into the Non-UCSF Email field, notifications will be sent, however, the customer will not be able to use the Employee Self Service (ESS).
In the **Work site** field:

- Type a few letters of the work site name to display a list of possible matches. Press Tab or Enter to select a work site.
- Alternatively, search for a work site by clicking the reference lookup icon 📜.

**Note:**

This field may be required based on the value selected in the App/Business Services field.

In the **App/Business Services** field:

- Type a few letters of the application or business service to display a list of possible matches. Press Tab or Enter to select a work site.
- Alternatively, search for an application or business service by clicking the reference lookup icon 📜.

In the **Symptom** field, select a symptom that best describes the affected application or business service.

**Note:**

There are nine global symptoms available. However, there may be additional symptoms available based on your selection in the App/Business Services field.

In the **Impact** and **Urgency** fields:

a. Select an impact that best represents the impact of the Incident on the end user.

b. Select an urgency that best represents the end user’s tolerance for delay.

**Note:**

These two fields set the Priority field. More information about Priority can be found in the “Priority Matrix” section of this document.

In the **Assignment group** and **Assigned to** field, select the group and (optionally) an individual who will work on the Incident.

**Note:**

For the **Assigned to** field, users can only assign tickets to an individual only if you are a member of the group selected in the **Assignment group** field. This restriction does not apply to the Service Desk staff.

In the **Short Description** field, type a short description of the Incident.
Click the **Save** button.

**Creating an Incident Using a Template**

Templates can quickly populate certain fields with specific values. Initially, some templates have been created for use by Service Desk staff.

![Screenshot of Incident form with options to apply templates]

To create an Incident using a template:

16. Right-click in the Title Bar.

From the Form Context Menu, select Templates → Apply Template.

Select the template; the template populates the form with pre-defined values such as App/Business Service and Symptom.

**Note:**

If you select a template on a non-blank form, the template will overwrite existing field values.

**Managing Incidents**

**Incident Priority Matrix**

The value of the Impact field AND the value of the Urgency field will automatically set the Priority field. The value set in the Priority field directly affects SLA metrics (response and resolution times), notifications, etc.
- **Impact** - defines the scope of the problem and is determined by the ITIL user. Options are 1-High (everyone), 2-Medium (one group), 3-Low (one person). Default is 3-Low.

- **Urgency** – Value may be populated by customer from the ESS. The best practice to not change this field if value is set from ESS. Options are 1-High (emergency), 2-Medium (immediate), 3-Low (future schedule). Default is 3-Low.

- **Priority** – Read only. Urgency + Impact calculate priority. See the matrix below.

![Impact-Urgency-Priority Matrix](image)

### First Call Resolve

Service desk staff has the ability to mark a ticket as “First Call Resolved”. This button displays on the Title Bar when a ticket has been opened but not yet saved. For reporting purposes, most service desks want to calculate the number of tickets that are resolved on the customer’s first call.

- Required fields Customer, App/Business Service, [possibly Work site], Symptom, Short Description, must have appropriate values.

- Resolution Notes field must also contain a value [emailed to customer].

- Click the “First Call Resolved” button and the following happens:

  - **The Incident State is changed to Completed.Resolved.**
  - **The First Call Resolve checkbox on the System Info tab is checked [for reporting purposes].**
  - **The Incident form is saved and closed, returning you to your previous location.**

### Incident States

The Incident State field indicates where in the lifecycle the Incident is at. The drop-down values are groupings of WIP (Work In Progress), Pending, and Closed.
When creating a new Incident, the Incident State defaults to WIP.Open. If the Incident is assigned to the group level only (no Assigned to), the value stays WIP.Open.

When the Incident is assigned to an individual (Assigned to), the state automatically changes to WIP.Assigned.

When the individual assignee opens the ticket, the value auto-changes to WIP.Acknowledged.

Once the ticket is saved at least once, the Pending and Complete.Resolved state becomes available.

**Auto Assignment**

Service Desk staff see a button called **Auto Assign** near the Save button. Pressing the Auto Assign button will select the appropriate Assignment group based on a combination of values from the fields: Customer Company, Desktop Service Type, Work site, Symptom, App/Business Service.

**Work Info**

**Work Log and INTERNAL Work Log**

The Work Log and INTERNAL Worklog fields are journal fields that provide a space to document the work being performed. These fields are *entry fields only*. Once you save the ticket, these values are copied to the journal and visible in the Activity log [see below].

- **Work Log**: The work log entries may be seen by customers from the ESS. Providing details and status updates on the issue here.

- **INTERNAL Worklog**: These entries are more sensitive and will not be seen by customers from the ESS (*Reminder: No SSN or identifying patient info should be captured here*).

<table>
<thead>
<tr>
<th>Work Log:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Computer issue: Desktop PC fan makes intermittent noise. Scheduled to take apart PC on Tuesday.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>INTERNAL Worklog:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check PC: clean out dust, oil fan.</td>
</tr>
</tbody>
</table>

**Resolution Notes**

Resolution notes field is a standard data entry field and is required. Enter essential information regarding the resolution of the ticket here.
**Note:**

This information will be copied to the customer in their ticket resolution email. Please use care when entering this information.

**Activity**

The Activity log captures field value changes, worklog entries, and email notifications. This log serves as the in-ticket audit trail.

**Related Records**

Related records display records in another table that have a relationship with the Incident record. The related records are located at the bottom of the ticket.
- **Incident** - View related Incidents; Can create a “child” Incident here.
- **Approvers** - View Approvers. [Used in limited circumstances.]
- **Task Surveys** - View Survey for this record.
- **Task SLAs** - View existing SLAs for this record.
- **MC Computer Asset** - Used by Medical Center IT
- **Requests** - View related Requests (base form of Service Request)
- **Requested Items** (Service Request items) - View related Requested Items (Service Request order items)
- **MC Computer Parts Lists** - Used by Medical Center IT
- **Change Requests** - View related Change Requests; Can create a related Change here.

**Selecting an Existing Record to Relate**

To select records for a related list:

1. From the record for which you are selecting related records (example, an Incident); Locate the related list (example, Change Request).
2. Click Edit....
3. Using the slush bucket, select the records to associate with the current record.
4. Click the **Save** button.

**Creating a New Related Record**

To create a new related record to list:
1. From the Incident record, locate the **Related Records** located at the bottom of the form.

2. Select one of the **Related Records**, for example, Incident and Click the **New** button. A new form for the related record opens.

3. Complete the new record.

4. Click **Submit and Close**. The new related record is added to the related record list for the Incident.
Chapter 7:

Working with Requests

Request Fulfillment delivers the goods and services that customers request through the Service Catalog. The Service Catalog application is a way for customers to order pre-defined, goods and services. It offers a consistent and intuitive online ordering experience with as much flexibility as you need. The catalog is a structured commodity with its own description, fields, price, and execution schedule.

Customers will see all the goods and services they can order (Campus AD Email Enable, Network Port Request, Pager, etc.), grouped into categories (Email, Calendar & Collaboration, Network & Wireless, Voice, Video & Pager Services, etc.) and a General Request.

Once an order is placed, the customer can track its progress from the Employee Self Service (ESS) using the link “My Orders”. Approvers will authorize the order (if necessary), and Fulfillment Groups perform any tasks related to item/service delivery, based on the Request Items and Request Tasks generated by the order.

Note:

Only certain service catalog order forms have been developed at this time. More items will be added in stages. If a customer does not see a specific form, they may use the General Request form.

Navigating to Service Catalog

Customers will use the Service Catalog from the Employee Self Service (ESS). For more information, go to the “Employee Self Service” section of this document. ITIL users can navigate to the Service Catalog within the tool. To navigate to the Service Catalog:

1. Perform one of the following options to navigate to the Service Catalog.
   - In the application navigation (left side) expand the application “Service Catalog” and click the module “Open Requested Items”; or
   - In the navigation filter (“Type filter text” box), type the application name “cat” and click the module “Open Requested Items”.

Select the Catalog module under the Service Catalog application.
Catalog Items

A Catalog Item is the actual good or service the customer can order. Each catalog item has unique fields and questions for the customer to complete and submit. Shown below is the Pager Request catalog item example.
Requests

When a customer submits a catalog item, a parent Request is generated. The parent Request is not assigned to anyone.

⚠️ Note:

As an ITIL user, you will not need to manage the parent Request, but only work on the child Request Item (see below).

Request Items

When a parent Request is generated, a child Request Item is created and assigned to a group. The Request Item contains the catalog item variables (order details).
Catalog Tasks

Catalog Task is one or more tasks that together must be executed in order to determine how the good or service is going to be procured, configured, and installed. A Catalog Task may be auto-generated and assigned based on the Catalog Item submitted or can be manually created.
Chapter 8:

Employee Self Service (ESS)

A separate training document for our customers called “ServiceNow ESS User Guide” is located on the ESS portal. Please review this document to better understand how to assist customers with the ESS.

The Employee Self-Service (ESS) portal enables customers to submit requests for hardware and software, log incidents, such as unresponsive software or network errors, and view the status of open orders and incidents. In the future, users will be able search the knowledge base and view articles. Individuals who use these features are called Employee Self-Service (ESS) users.

This Chapter provides an overview of the ESS from the support staff perspective.

Understanding the Employee Self Service

Navigating to Employee Self Service (customer)

Customers will navigate to the Employee Self Service using one of the following methods:

- [https://servicenow.ucsf.edu/ess](https://servicenow.ucsf.edu/ess)
- [http://help.ucsf.edu](http://help.ucsf.edu) and clicking on Submit an IT ticket.

<table>
<thead>
<tr>
<th>Online Customer Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>New! <a href="http://help.ucsf.edu">Submit an IT ticket</a></td>
</tr>
</tbody>
</table>

Now tickets for Medical Center IT, SFGH IT, School of Medicine ISU, and ITS are all handled by the same system!

Navigating to Employee Self Service (ITIL User)

You can navigate to Self Service, using one of the following methods:

- In the application navigation (left side) expand the application “Self Service” and click the module “Homepage”; or
- In the navigation filter (“Type filter text” box), type the application name “self” and click the module “Homepage”.

---

UCSF ServiceNow User Guide
Employee Self Service Homepage

The Self Service Homepage is a landing page for customers to submit Service Catalog requests and Incidents.

- Clicking the Homepage link under Self Service from the standard UI (ITIL version) opens the ESS in a new tab. It is available here to be used as a reference or guide for ITIL users to assist customers if they have questions about the ESS.

Order Things

This section provides a selection of service catalog request items such as: Campus AD Email Enable request; Listserv Mailing List request; DNS request; Network Port request; Pager Request; and Telephone Hardware and Voice Services request. There is also a link: “Don’t see what you are looking for, click here” which submits a general request. Additional service catalog items will be added in stages.
Knowledge
This section is “coming soon” and will provide knowledge base items for customers, announcements, outage notices, etc. This section will be built out soon.

Get Help
This section submits an Incident ticket with the options being “Something Broken” or “Ask a Question”.

ESS User Guide Link
A User Guide link, located at the top of the ESS homepage provides a tutorial document for customers who have questions on how to use the ESS.
Chapter 9:

**Working with Change Requests**

Effective Change Management involves the proper processing of Change Requests. In other words, Change Management is the process of assessing any impact or potential risk a proposed change could have on your organization before it is introduced. Control of the lifecycle of all the changes, ensures that Changes are made with as little disruption to the organization as possible. A change is an action resulting in a new status for one or more configuration items (CIs).

The goal of Change Management is to ensure the use of standardized methods and procedures for handling change requests, minimizing the impact of change-related issues and improving daily operations.

**Change Process**

The creation and implementation of changes generally take the following steps. Each of these steps will be described in this document:

1. Create a New Change Request.
2. Plan and Schedule the Change.
3. Change Approval.
4. Implement Change.
5. Post Implementation Review.
High Level Change Process Workflow

Change Roles

There are six types of Change Management roles:

- **Requester** – A requester is a business user who submits a Change Request to the support staff. While any Change Management user can enter change requests into the system, change requests are likely initiated by a change manager or manager.

- **Change Coordinator (Assignee)** – The Change Assignee is responsible for planning and implementing assigned changes. The Change Assignee might be working actively on the change, or coordinating the efforts of other groups or individuals.

- **Task Implementer** – The Task Implementer is responsible for executing the change and ensuring they are completed according to the implementation plan.

- **Change Manager** – The Change Manager is responsible for reviewing risk assessment and the implementation plan of the Change Request. The Change Manager checks the plan to ensure that appropriate precautions have been planned to minimize both the risk of failure and the impact on the user(s), and that timing of the implementation does not conflict with other planned outages or planned events.

- **Peer Reviewer** – The Peer Reviewer is responsible for inspecting the technical aspect of the change as defined by the supporting IT department.
- **Approvers** – Approvers are responsible for reviewing the Change Request and Approving or Rejecting the request. There are three approver roles and the level of approval required is based on Change Type and Risk. For more information, see the “Change Approval” section of this document.

**Type of Changes**

Change requests are divided up into the four Types described below:

- **Emergency** – An emergency change is the highest priority change that can be defined in an organization. Emergency changes are defined as changes that need to be implemented to resolve a Critical or High (Priority) Incident. Emergency changes are preapproved, but require a Group Manager review after implementation.

- **Comprehensive** – A Comprehensive change requires CAB review and approval

- **Comprehensive Expedited** – A Comprehensive Expedited change refers to changes that require implementation before review can take place at the regularly scheduled CAB meetings. These changes are reviewed and approved by the Expedited CAB

- **Routine** – A routine change refers to pre-approved changes. Pre-approved changes can be defined for a variety of tasks and are typically low risk, low effort changes. Routine changes are created using a template.
Navigating to Change Application

You can navigate to Change, using one of the following methods:

- In the application navigation (left side) expand the application “Change”; or
- In the navigation filter (“Type filter text” box), type the application name “ch”.

Change Modules

The Change application provides a set of commonly used modules. The modules have been organized to allow users to easily manage their work:

- **Overview** – Displays Change related gauges and reports.
- **My Approvals** – Displays in a list view, the last 30 days of approval requests that have been assigned to you.

**Change**

- **Create New** – Opens a new Change ticket form.
- **Changes** – Displays a list of all Change tickets.
- **Open – My Assignments** – Displays all open change tickets that are assigned to you.
- **Open – My Groups** – Displays all open change tickets that are assigned to your group(s).
- **Closed & Cancelled – My Groups** – Displays all the closed and cancelled tickets assigned to your group(s).
**Change Task**
- **Change Tasks** – Displays all open change tasks.
- **Open Tasks – My Assignments** - Displays all open change task tickets that are assigned to your group(s).
- **Open Tasks – My Groups** - Displays all the closed and cancelled task tickets assigned to your group(s).

**SDLC Task**
- **SDLC Tasks** – Displays all open change SDLC tasks.
- **Open SDLC Tasks – My Assignments** - Displays all open change SDLC task tickets that are assigned to your group(s).
- **Open SDLC Tasks – My Groups** - Displays all the closed and cancelled SDLC task tickets assigned to your group(s).

**Scheduling**
- **XXX Forward Schedule of Change** – Displays a calendar view of changes sorted by Planned Start Date and filtered to only include changes from your affiliated IT organization (XXX= ITS, ISU, MC).
- **Maintenance Schedules** – Displays maintenance schedules
- **Blackout Window** – Displays all change Blackout Schedules for ITS, ISU and MC.
- **XXX Blackout Window** – Displays a list of view of all blackout schedules for your IT organization, (XXX =, ITS, MC or ISU).
Search for Change Records

There are four pre-defined modules for searching change records:

- **Changes** – Displays all change tickets.
- **Open – My Assignments** – Displays all open change tickets that are assigned to you.
- **Open – My Groups** – Displays all open change tickets that are assigned to your group(s).
- **Closed & Cancelled – My Groups** – Displays all the closed and cancelled tickets assigned to your group(s).

To customize your search:

1. Click the module **Open – My Assignments**.
2. Open the Smart Filter condition builder by clicking the arrow (↑) beside the breadcrumbs.
3. Modify the search filter. For more information on filters, see “Creating Filters” section of this document 19.
4. Click **Run (Run)** to apply the filter.
Create a New Change Request

All requests for change will be documented within ServiceNow by creating a new change record. The completion of a new request for change will be completed by the Change Coordinator with input from the Change Requester. A business justification will be documented and screened by the Assignment Group Manager who determines whether to authorize or deny the change based on the information in the new change record.

To create a new Change Request:

1. Perform one of the following options to navigate to the Change form:
   - In the application navigation (left side) expand the application Change and click the module Create New; or
   - In the navigation filter (“Type filter text” box), type the application name “ch” and click the module Create New.

2. In the Requested by field (defaults to user creating the Change):
   - Type a few letters of the requester’s name to display a list of possible matches. Press Tab or Enter to select a name.
   - Alternatively, search for a name by clicking the reference lookup icon.

3. The Type field will automatically default to Comprehensive.

   **Note:**
   - Expedited Comprehensive is auto populated when the Planned Start Date is before the CAB Date.
   - Routine changes are created using a template. For more information, see the “Creating a Routine Change” section of this document.
   - Emergency changes are created by entering a high or critical priority incident ticket number in the Parent Incident field.

4. In the Category field, select a category.

5. In the Configuration item field:
   - Type a few letters of the application or business service to display a list of possible matches. Press Tab or Enter to select a work site.
   - Alternatively, search for an application or business service by clicking the reference lookup icon.

6. In the Assignment group field, select the group. You may optionally complete the Assigned to field.
Note:

For the Assigned to field, users can only assign tickets to an individual only if you are a member of the group selected in the Assignment group field.

7. In the Work Info tab:
   - In the Short Description field, type a short description of the Change.
   - In the Why is this Change being implemented? Field, type a reason why this change is being implemented.

8. Click the Save button.

Creating a Routine Change

A routine change refers to pre-approved change. Pre-approved changes can be defined for a variety of tasks and are typically low risk, low effort changes. Routine changes can only be created using a template.

To create a Routine Change:

1. Perform one of the following options to navigate to the Change form.
   - In the application navigation (left side) expand the application Change and click the module Create New; or
   - In the navigation filter (“Type filter text” box), type the application name “ch” and click the module Create New.

2. Right-click in the Title Bar.

3. From the Form Context Menu, select Templates → Apply Template.
4. Select the template; the template populates the form with pre-defined values such as Type, Configuration item, Risk, Short Description, etc.

**Note:**

If you select a template on a non-blank form, the template will overwrite existing field values.
Plan, Schedule, and Request Approval

The Change Coordinators work with the change requester to identify how the change may impact the infrastructure, business operations, and end user productivity. The Change Coordinator uses this information to further research and develops an extensive risk and impact analysis. When completing the analysis of the change, the Change Coordinator must ensure they consider the business as well as the technical impacts and risks.

The following steps must be complete in order to request approval for a Comprehensive or Expedited Change Request:

1. Enter a Peer Reviewer.
2. Enter a Group Manager Approver.
3. Select “Planning” from the State drop down list.
4. In the Assigned To field, select the individual who will be coordinating the Change.
5. In the Schedule tab, complete all required fields.

**Note:**

The Why is this Change being Expedited? field is required only when the Planned Start date is before the CAB. When this occurs the Type field will be set to “Expedited Comprehensive”.

If the planned Start Date is set to occur during a Blackout Period, the IT Director Approver field will be required.

6. In the Change, Backout, and Test Plan tab, complete all the required fields.
7. In the Change Impact tab complete all the required fields.
8. Click the Save button to save the change updates.
9. Upon saving the change updates the Request Approval button will be displayed at the top of the Change ticket. Click the Request Approval button to initiate the approval workflow.
Change Approval

The Change Coordinator uses ServiceNow to record an efficient process for routing to approvers for approval or rejection of the change. There is one reviewer and three approver roles. The level of approval required is based on Change Type and Risk.

- **Peer Reviewer** – Peer reviews are the last step of the Change Planning Phase. This step ensures that all the technical components have been completed. This review can be completed by anyone in the IT business unit implementing the change. Peer reviews are informal and completed using a text name reference field that is filled out by the Change Coordinator.

- **Group Manager** – The Group Manager is responsible for reviewing risk assessment and the implementation plan of the Change Request. The Group Manager checks the plan to ensure that appropriate precautions have been planned to minimize both the risk of failure and the impact on the user(s), and that timing of the implementation does not conflict with other planned outages or planned events. The Group Manager is typically an IT business unit manager and a single organization can have several Group Managers. The IT business unit manager may delegate this role to another member of their team. The Group Manager approves all comprehensive change tickets.

- **IT Director** – The Director Approver is a member of Senior Management and is responsible for ensuring that high risk changes to the environment fit in with the overall mission of the organization’s IT Strategic Plan. Approval requests are only forwarded to the IT Director after the Group Manager has approved the Change.

- **CAB** – The Change Advisory Board (CAB) is the change management decision-making authority for the IT organization. A single organization can have several CABs, one for each department (ex. ITS, Medical Center, etc.).

- **Expedited CAB** – The Expedited Change Advisory Board (CAB) serves the same purpose as the regular CAB, except that review and approval is accelerated since it must occur before the regularly scheduled CAB meeting. A single organization can have several Expedited CABs, one for each department (ex. ITS, Medical Center, etc.).

Approval Workflow

The process of authorizing a Change Request depends upon the type and risk level of the change and will be handled in the following manner:

- **Emergency changes** are pre-approved and do not require a formal approval process. All emergency changes will be entered into ServiceNow as soon as possible and will be tracked and reviewed by the Group Manager and the CAB.

- **Routine changes** are pre-approved and do not require a formal approval process in ServiceNow.
**Note:**

Any Changes that you would like to be considered as Routine will require an initial review and approval by the CAB. Once the Routine change is approved, a template will be created in ServiceNow for use as a pre-approved Change and will not require formal approval going forward.

- **Comprehensive and Expedited Comprehensive changes** requires a formal approval process and the Change must be approved by all approval authority as identified in the change record.

- Required levels of approvals are based on the Change Risk Level. The required review and approvals are shown in the table below.

<table>
<thead>
<tr>
<th>Risk Level</th>
<th>Comprehensive</th>
<th>Comprehensive Expedited</th>
</tr>
</thead>
</table>
| High       | Peer Reviewer (informal)  
Group Manager  
IT Director  
CAB            | Peer Reviewer (informal)  
Group Manager  
IT Director  
Expedited CAB via email |
| Moderate    | Peer Reviewer(informal)  
Group Manager  
CAB            | Peer Reviewer (informal)  
Group Manager  
Expedited CAB via email |
| Low         | Peer Reviewer (informal)  
Group Manager  
CAB            | Peer Reviewer (informal)  
Group Manager  
Expedited CAB via email |

**Approving the Change**

To approve or reject the Change Request:

1. Perform one of the following options to navigate to the **My Approval** module.

   - In the application navigation (left side) expand the application **Change** and click the module **My Approval**; **or**
   - In the navigation filter (“Type filter text” box), type the application name “ch” and click the module **My Approval**.

2. Select the reference icon of the Change record you would like to approve or reject. This will open the Approval record.

3. Click the **Approve** button to approve the Change; or click the **Reject** button to reject the Change.

   - If you **Reject** the Change, the **Comments** field will be required.
Note:

- If the approver rejects the Change and is requiring additional information, you will need to move the Change back to the Planning state. After you have updated the Change with additional information, you will need to request approval again.
Implement Change

Once the Change Request is approved, the State changes to “Scheduled”. When the Change is ready for implementation, the State can be changed to “Work in Progress”. The “Work in Progress” State is concerned with the steps necessary to successfully implement the change:

- Complete final planning
- Complete required notifications
- Complete the change implementation
- Test, validate and accept the change
- Complete final change documentation

To start implementation of the Change Request:

1. In the State field, select “Work in Progress”.
2. In the Work Info tab, Worklog field, enter any necessary notes.
3. Click the Save button.

After you have completed the Change implementation:

1. In the State field, select “Closed Pending Review”.
2. In the Change Result field, select a value that best describes the result of the Change.
3. In the Work Info tab, Worklog field, enter any necessary notes.
4. In the Schedule tab, enter dates in the Actual Start Date and Actual End Date fields.
   Select a date using the date icon.
5. Click the Save button.
Post Implementation Review

Once the Change is implemented, a Post Implementation Review (PIR) task may be required. A PIR task is automatically created for any Emergency change ticket. For emergency changes, a Post-Implementation Review is completed by the Group Manager. A PIR is also created for all other change types, comprehensive, expedited comprehensive and routine, when the Change Result field value is not equal to “Successful”. The findings of the PIR are documented within the Change Ticket.

To complete the PIR:

1. From the Change record, locate the Change Tasks tab located at the bottom of the form.

   **Note:**
   The Change Tasks tab will only appear after a change ticket has been saved.

2. Select the Change Tasks tab and click the reference icon of the PIR Task. This will open the Change Task record.

3. In the Task State field, select “Work in Progress” (if PIR is in progress) or “Closed Complete” (if PIR has been completed).

4. In the Assigned to field, select an individual who conducted the PIR. For emergency changes, this field is prefilled with the Group Manager Approver.

5. In the Work Log field, enter any necessary notes.

6. Click the Save and Close button.

Close Change

The final phase of the Change Request is to close the ticket. This phase may occur after the Post Implementation Review, if one was conducted.

To close the Change Request:

1. In the State field, select “Closed”.

2. In the Work Info tab, Worklog field, enter any necessary notes.

3. Click Save and Close button.
Change Tasks

You can create Change Tasks for a Change Request. All Change Tasks must be completed before the Change Request can be closed.

To create a new Change Task related record for a Change Request:

1. From the Change record, locate the Change Tasks tab located at the bottom of the form.

   ![Note:
   The Change Tasks tab will only appear after a change ticket has been saved.

2. Select the Change Tasks tab and click the New button. A new form for the Change Task record opens.

3. Complete the new Change Task record and click Submit and Close. The new related Change Task record is added to the Change Tasks related record list.

<table>
<thead>
<tr>
<th>Change Tasks (1)</th>
<th>Approvers (5)</th>
<th>Affected CIs</th>
<th>Impacted Sets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Tasks</td>
<td>New</td>
<td>Go to Number</td>
<td></td>
</tr>
<tr>
<td>Change request = CHG0030742</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number</th>
<th>Short Description</th>
<th>Task State</th>
</tr>
</thead>
<tbody>
<tr>
<td>CTASK0010289</td>
<td>Post Implementation</td>
<td>Closed</td>
</tr>
</tbody>
</table>
SDLC Release Task

You can create SDLC Release Tasks for a Change Request. All SDLC Release Tasks must be completed before the Change Request can be closed.

To create a new SDLC Release Task for a Change Request:

1. From the Change record, locate the SDLC Release Tasks tab located at the bottom of the form.

   **Note:**
   The SDLC Release Tasks tab will only appear after a change ticket has been saved and if the “Application Software” is selected in the Category field.

2. Select the SDLC Release Task tab at the bottom of the change form and click the New button. A new form for the SDLC Release Task record opens.

3. In the Phase field, select a value.

4. Complete the SDLC Release Task record and click Submit and Close. The new related SDLC Release Task record is added to the SDLC Release Tasks related record list.

To create a SDLC Release Task for Change-L migration:

Complete steps 1-2 above.

3. In the Phase field, select “Release”.

4. Complete remaining necessary fields.

5. Add attachments by clicking the Paperclip icon in the title bar.

6. Click the Save button.

7. Click the email icon in the title bar. An email preview will open.
   - Review the email for accuracy. If any fields are incorrect, close the email and enter the correct values on the SDLC Release Task form and click the Save button.

8. Click the Send icon. An email will be sent to the Change-L listserv.
# Appendix A: Incident Form Field Definitions

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Field Definition</th>
</tr>
</thead>
</table>
| Customer                 | Records the customer who is reporting the Incident.  
|                          | This is a reference field. You can use type-ahead or use the reference lookup.  
|                          | Value entered will populate the following fields:  
|                          | • The VIP icon (VIP icon) indicates a VIP customer  
|                          | • Customer Employee number  
|                          | • Customer Department  
|                          | • Callback number  
|                          | • Customer Email Address  
|                          | • Default Location  
|                          | • Room Number  
|                          | Clicking the “Show incident for this customer” button (Show incident for this customer) will open a new browser tab and display a list view of all Incidents for this customer. |
| Customer Employee number | Displays the customers UCSF ID number.  
|                          | This field is populated by Customer field value.  
|                          | The Customer Employee number automatically updated when the Customer field is updated. |
| Customer Department      | Displays the customer’s Department name.  
|                          | This field is populated by Customer field value.  
|                          | The Customer Employee number automatically updated when the Customer field is updated. |
| Callback number          | Displays the customer’s phone number.  
|                          | This field is populated by Customer field value.  
|                          | The field can be modified for a specific ticket. |
| Customer Email Address   | The address to be used for communication with the customer.  
|                          | This field is populated by Customer field value.  
|                          | The email icon (Customer Email Address) will open a new email addressed to the customer using your default email client (e.g. Outlook). The email message will not be documented in the ServiceNow worklog or activity log. |
| Do Not Notify            | Documents notification option for customer.  
|                          | This is a checkbox field. If the box is checked the customer notifications will not be sent.  
|                          | Please follow your department’s guideline when using this feature. |
| Default Location         | Customer’s location.  
|                          | This field is populated by Customer field value.  
|                          | This field can be modified for a specific ticket. |
| Room Number              | Defines further the customer’s location.  
|                          | This field is populated by Customer field value.  
<p>|                          | This field can be modified for a specific ticket. |</p>
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent work site</td>
<td>A high level designation of the location where the customer work will be performed. This is a reference field. You can use type-ahead or use the reference lookup. It can also be prepopulated by entering the Worksit field.</td>
</tr>
<tr>
<td>Work site</td>
<td>This is the actual location where the customer work will be performed. This is a reference field. You can use type-ahead or use the reference lookup. The value entered will populate the Parent work site field. This field may be required based on the value selected in the App/Business Service field. Categories of CIs that require Work Site are: Networking, Desktop, and Telecom.</td>
</tr>
<tr>
<td>Division</td>
<td>Used to further define a customer’s department information. This is a reference field. You can use type-ahead or use the reference lookup. This field is currently only being used by SFGH.</td>
</tr>
<tr>
<td>Categorization Fields</td>
<td>These fields are used to evaluate, manage and resolve incidents efficiently and effectively.</td>
</tr>
<tr>
<td>Number</td>
<td>Unique number assigned to the incident. This is a system generated field. The Incident number is displayed immediately when the ticket is opened, this allows customer service to quickly provide the number to their customer. Note: If the ticket is closed prior to clicking SAVE the ticket will not be recorded in the ServiceNow database.</td>
</tr>
<tr>
<td>Incident state</td>
<td>The status of the ticket. This is a drop down field. Initially one of the following states may be selected: WIP.Open, WIP Assigned, WIP Acknowledged, Complete Resolved. For more details on Incident states see Chapter 6 Work with Incidents, Incident States.</td>
</tr>
<tr>
<td>App/Business Service</td>
<td>A concise list of configuration items used for categorization and routing of the incident. This is a reference field. You can use type-ahead or use the reference lookup. This is a required field. For example: Applications (Eclipse, STOR, MyAccess, etc.) and Business Services (Desktop Support, Exchange, Landline, Keyboard, etc.)</td>
</tr>
<tr>
<td>Configuration Item</td>
<td>A detailed list of IT products and services, such as software or desktop support. This is a reference field. You can use type-ahead or use the reference lookup. This is an optional field; it is not a required field. It can be used to provide more information about the incident being reported. For example: If the value in App/Business Service is “Desktop Support” you can then select the CI “Outlook”.</td>
</tr>
<tr>
<td>Symptom</td>
<td>Description of the incident that is being reported. This is a drop-down field. This is a required field. There are nine common symptoms available for selection; additional symptoms may be displayed depending on the App/Business Service selected. For example: The App/Business Service value “APEX (EPIC)” provides several specific Symptoms including, “InBasket Issue” and “Encounter Issue”.</td>
</tr>
<tr>
<td>Impact</td>
<td>The effect that the incident has on the business. This is a drop-down field. Options are 1-High, 2-Medium, 3-Low. Default is 3-Low. Impact combined with Urgency calculates the value set in the Priority field.</td>
</tr>
<tr>
<td>Urgency</td>
<td>The extent to which the incident’s resolution can bear delay. This is a drop-field. (ESS customers can select an urgency of Medium or Low) Options are 1-High, 2-Medium, 3-Low. Default is 3-Low. Impact combined with Urgency calculates the value set in the Priority field.</td>
</tr>
<tr>
<td><strong>Priority</strong></td>
<td>Determines how quickly the service desk should address the incident. This is a read only field. Impact combined with Urgency calculates the value set in the Priority field. For more details on Priority see Chapter 6 Work with Incidents, Priority Matrix.</td>
</tr>
</tbody>
</table>
| **Incident Type** | Describes the kind of issue being reported. This is a read only, which is auto-set by Symptom value. There are 3 types of Incidents:
- Interruption – a break/fix affecting one person. *For example:* A single computer does not boot.
- Event – a break/fix affecting a large group of people. *For example:* Network is unavailable for an entire floor (Symptom=Major Outage).
- Request - a simple request *(not* a service catalog request). *For example:* An account creation/modification, an add/install/update configuration, or a how-to/inquiry. |
| **Assignment group** | The functional/technical group responsible for the ticket. This is a reference field. |
| **Assigned to** | The individual assigned to the ticket. This is a reference field. *Note: The Assign to field can only be updated by a member of the Assignment group or by the Customer Support Service Desk.* |

**Work Info tab fields:** The Work Info tab contains the primary information about the issue being reported.

| **Short Description** | A brief descriptive statement of the incident. This is a text field. The value may be populated by the customer from the ESS. |
| **Description** | Detailed descriptive statements summarizing the incident being reported. This is a text field. The value may be populated by customer from the ESS. |
| **Hostname** | A label assigned to a device connected to a computer network. This is a text field |
| **MRN** | Medical Record Number. This is a text field This field is used by the Medical Center. |

**Work Log**
Documents the work that has been done in support of the ticket. This is a journal field.

When the record is saved, journal field entries are listed in the Activity field next to the icon with the user name and timestamp. Non-ITIL customer can see Work Log entries from the ESS.

**INTERNAL Worklog**
Documents sensitive information regarding the incident. This is a journal field.

When the record is saved, journal field entries are listed in the Activity field next to the icon with the user name and timestamp. Non-ITIL customer cannot see Internal Work Log entries from the ESS. *Note: Do not enter SSN or any identifiable patient information in the Internal Worklog.*

**Resolution Notes**
Essential information regarding how the incident was handled and corrected. This is a journal field. *Note: This information will included in the customer resolution email, use care when entering resolution notes.*

**System Info tab:** The System Info tab contains fields set by the system.

| **Active** | The ticket has a status of WIP (Work In Progress) or Pending. This is a read only check-box field. |
| **First Call Resolve** | Used for reporting the number of calls that were resolved by the Service Desk at the time the ticket was created. |
This is a read only check-box field. For more details see Chapter 6 Work with Incidents, First Call Resolve.

**ApexNow Link Off**
Denotes that an APEX ticket in ServiceNow is no longer linked to the ApexNow ticket, the ticket has been reassigned to a group other than APEX.
This is a checkbox field.
This field is primarily used by the Medical Center.

**Opened**
Indicates the date/time the Incident form was opened.
This is a date and time field and is read only.
*Note:* The Created value documents the date and time the ticket was first saved to the database.

**Opened by**
The name of the person submitting the ticket.
This is a read only text field.
This field is populated based on the user's login information.

**Updated**
The date/time the ticket was last modified.
This is a date and time field and is read only.

**Updated by**
The UCSF ID of the person who last modified the ticket.
This is a read only text field.

**Closed**
The date/time the ticket state was marked as Complete.
This is a date and time field and is read only.

**Closed by**
The name of the person who marked the ticket as Complete.
This is a read only text field.

**TemplateName**
Indicates the template used to create the incident. This field is only populated if a template was used in the creation of the ticket.
This is a text field.

**Duration**
The length of time the ticket was opened.
This field is Days and Hours.
ServiceNow auto-calculates the duration (from opened to closed) in days, hours, minutes and seconds.

**Contact type**
Indicates the method used to report the incident.
This field is a drop-down.
The default value is **Phone** when ticket is submitted from the standard ITIL interface.
When the ticket is submitted from the ESS, the value is **Self-Service**.

**Reassignment count**
Designates the number times a ticket has been assigned at the group level.
This is a number field.

**UCSF Company Code**
Currently not in use

**About Financials tab:** The Financials tab contains fields relevant to re-charge (if applicable).

**DPA-Fund**
The account number used to define a funding source.
This is a reference field. You can use type-ahead or use the reference lookup.
Value entered will populate the following fields:
- DPA-Fund Cost Center Name
- DPA-Fund Cost Center Number

**DPA-Fund Cost Center Name**
The Cost Center Name associated with a particular DPA-Fund.
This field is populated by the DPA-Fund field value.

**DPA-Fund Cost Center Number**
The Cost Center Number associated with a particular DPA-Fund.
This field is populated by the DPA-Fund field value.

**Recharge Time**
Documents the billable time spent to resolve a ticket.
This is a Days and Hours field.
Each user enters their rechargeable time spent in days, hours, minutes and seconds. Users must do their own simple math. **Example:** If you need to add 15 minutes, and the value already says
00:10:00, you will need to adjust the value to 00:25:00 to capture your additional 15 minutes. **Note**: If the hour value is set to 24 or greater, the system will translate it to 1 Day.

**Recharge Flag**
- Checkbox that allows tickets to be marked for recharge.
- This is a checkbox field.
- The recharge flag is manually set.

**Recharge Complete**
- Checkbox that indicates that the ticket has been processed for recharge.
- This is a checkbox field.
- Recharge complete is manually set.

**Desktop Service Type**
- Displays the desktop provider and a corresponding service level. Based on the Customer
- This field is auto-populated from the customer field.
- The field has a drop-down list to allow users to update the ticket.
- The Desktop Service field is used for SLA and reporting purposes.

**Program Code**
- A unique number used to further define the accounting source.
- This is a reference field. You can use type-ahead or use the reference lookup.
- Value entered will populate the following fields:
  - Program Code Program Name
  - Program Code Program Year

**Program Code Program Name**
- The Program Name associated with a particular program code.
- This field is populated by the Program Code field value.

**Program Code Program Year**
- The Program Year associated with a particular program code.
- This field is populated by the Program Code field value.

**ARF tab**: The ARF tab contains fields relevant to the Medical Center’s Account Request Form system.

**Link to ARF**
- Displays the URL to the ARF request.
- This is a system field.

**Requested For**
- The name of the individual that the account request is for.
- This is a text field, populated by the system.

**Role**
- The business role associated with account requested.
- This is a text field, populated by the system.

**Original Incident ID**
- Lists the original Incident number.
- This is a text field, populated by the system.

**Bulk**
- Denotes a bulk request.
- This is a checkbox field, populated by the system.

**Watch list**
- A list of additional names that require updates on the ARF request.
- This is a reference field.
- The user can select names from the customer reference table and must provide a valid email address for notifications.

**Follow-up Info tab**: The Follow-up Info tab fields allow a user to create a follow-up email to be sent to the “Assigned to” of the Incident on a specified date/time.

**Follow up (date)**
- Indicates date/time that a follow-up note will be sent to tickets “Assigned to”.
- This is a date-time field.
- Click the date/time icon ( ) to set the delivery time.

**Follow up note**
- The text of the note to be emailed to the “Assigned to”.
- This is a journal field.
- **Note**: If no “Follow up (date)” is entered, the note will never be sent.

**Related Records tab**: The Related Records tab fields display the parent ticket number of either the Incident or Change that created the Incident ticket you are viewing.
| **Parent Incident** | Displays the Incident number of the Incident (parent) that created the Incident you are viewing (child).  
This field is automatically populated when the child ticket is created.  
Click the hover icon ( ) to see information about the parent ticket. |
| **Caused by Change** | Displays the Change number of the Change (parent) that created the Incident you are viewing (child).  
This is reference field.  
Click the hover icon ( ) to see information about the Change. |
## Appendix B: Change Form Field Definitions

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Field Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Upper Left Section</strong></td>
<td></td>
</tr>
<tr>
<td>Number</td>
<td>Unique number assigned to the change ticket. This is a system generated field. The Change number (CHG) is displayed immediately when the ticket is opened. Note: If the ticket is closed prior to clicking SAVE the ticket will not be recorded in the ServiceNow database.</td>
</tr>
<tr>
<td>Requested By</td>
<td>Records the requester of the Change. This is a reference field. You can use type-ahead or use the reference lookup. The field is automatically populated based on the logged in user. Click the hover icon ( roam ) to see information about the requester.</td>
</tr>
<tr>
<td>Requested By Date</td>
<td>The preferred completion date. This is date/time field. Click the date/time icon ( ) to set the Request by date.</td>
</tr>
<tr>
<td>Peer Reviewer</td>
<td>Records the individual responsible for inspecting the technical aspects of the change as defined by the supporting IT department. This is a reference field. You can use type-ahead or use the reference lookup. No approval workflow is initiated from this field.</td>
</tr>
<tr>
<td>Group Manager Approver</td>
<td>Typically the IT business unit manager responsible for reviewing the risk assessment and implementation plan for the Change. The manager may delegate this role to a member of their team. This is a reference field. You can use type-ahead or use the reference lookup. An approval workflow is initiated when this field is populated.</td>
</tr>
<tr>
<td>IT Director Approver</td>
<td>A member of senior management responsible for approving high risk changes to the environment, ensuring they fit in the overall mission of the IT strategic plan. This is a reference field. You can use type-ahead or use the reference lookup. This field is required when the Planned Start or Planned End date and time of a change is set to occur during a Blackout period. An approval workflow is initiated when this field is populated.</td>
</tr>
<tr>
<td>CAB Group</td>
<td>Change Advisory Board group is made up of individuals with stakeholder interest in the IT production environment. This field is automatically populated based on the entry in the Assignment Group field. There are three CAB Groups:</td>
</tr>
<tr>
<td></td>
<td>• ITS CAB</td>
</tr>
<tr>
<td></td>
<td>• Medical Center CAB</td>
</tr>
<tr>
<td></td>
<td>• School of Medicine – ISU CAB (includes SFGH)</td>
</tr>
<tr>
<td>CAB Date</td>
<td>Displays the next CAB meeting. This field is automatically set based on the assignment group. This field is a time and date field. Click the date/time icon ( ) to change the default CAB date.</td>
</tr>
<tr>
<td>Watch List</td>
<td>A list of additional names that require updates on the Change request. This is a reference field. You can use type-ahead or use the reference lookup. The user can select names from the customer reference table and must provide a valid email address for notifications. An Email notification is sent when certain change events occur. For example: A Change ticket is closed or a Change Task is opened.</td>
</tr>
<tr>
<td><strong>Upper Right Section</strong></td>
<td></td>
</tr>
<tr>
<td>-------------------------</td>
<td></td>
</tr>
<tr>
<td><strong>Back to Planning button</strong></td>
<td>This button appears when a change ticket advances past the Planning state and disappears when the state is Work in Progress, Closed Pending Review or Closed. By clicking this button, the state of the ticket is changed to Planning. This unlocks fields and allows users to make changes. For Comprehensive and Expedited Comprehensive tickets, a user must click the Request Approval button to reinitiate approval requests.</td>
</tr>
</tbody>
</table>
| **State** | The status of the ticket. This is a drop-down field. The following status values are found in the drop-down list:  
- Open – default upon creation  
- Planning – selected manually when entering the planning state  
- Pending Approval – automatically updated when the required fields are completed and the Request Approval button is clicked  
- Scheduled – automatically updated when all approvers have approved the request. (When the change type is Emergency or Routine, this state can manually be selected)  
- Rejected – automatically updated when any of the approvers reject the change ticket  
- Work in Progress – manually selected when work begins  
- Closed Pending Review – manually selected when this state is selected, a Post Implementation Review Task is automatically created if required.  
- Closed – manually selected  
- Cancelled – manually selected |
| **Approval State** | The status of approval of the change. This is a system field. Updates are based on the results of the approval workflow. The following values can be found in this field:  
- Not yet requested – default upon creation  
- Requested - automatically updated when the Approval request button has been clicked  
- CAB Requested – automatically updated when the Group Manager Approver and, if required, the IT Director Approver have approved the change.  
- Approved – automatically updated when all approvals have been documented  
- Rejected – automatically updated when one approver rejects the change |
| **Type** | Denotes the various change workflows that can be used to implement a change request. This field is automatically set.  
- Comprehensive – default value for change.  
- Emergency – set when the Parent incident field contains an incident ticket with a Critical or High priority.  
- Expedited Comprehensive – set when the Planned Start date is set to occur before the CAB date.  
- Routine - set when a change template is applied. For more information on the Type field see Chapter 9 Working with Change Request, Types of Changes section. |
| **Parent Incident** | Denotes that the change ticket was initiated as incident. This is a reference field. You can use type-ahead or use the reference lookup. This field displays all active Incident tickets. |
| **Category** | A concise list of items used to categorize a Change request. This drop-down field. |
| **Action** | Describes the change, based on the Category selected a unique set of actions are presented for selection. Drop down list. |
| **Reason** | Describe why the change is being requested. Drop down list. |
| **Configuration Item** | A detailed list of IT products and services, such as software or desktop support. This is a reference field. You can use type-ahead or use the reference lookup. |
| **Risk** | Denotes the level of exposure derived from the assessment phase of the process. The risk level is chosen from the following drop down list: |
• High
• Moderate
• Low

Assignment Group
The functional/technical group responsible for the ticket. This is a reference field.

Assigned to
The individual assigned to the ticket. This is a reference field.
Note: The Assign to field can only be updated by a member of the Assignment group or by the Customer Support Service Desk.

Work Info Tab - The Work Info tab contains the primary information about the change.

Short Description
A brief descriptive statement of the change. This is a text field.

Why is the Change being implemented?
Records the business justification for the change. This is a journal field.

Worklog
Documents the work that has been done in support of the ticket. This is a journal field.
When the record is saved, journal field entries are listed in the Activity field next to the icon with the user name and timestamp.

Schedule Tab – The Schedule Tab documents planned and actual dates related to the change.

Planned Start Date
Denotes the anticipated begin date of the work. This is a date/time field.

Implementation Time
Denotes the length of time required to complete the change request. Hours: Minutes: Seconds: field.

Backout Time
Denotes the length of time required to remove the change from production if a problem is encountered that cannot be resolved. Hours: Minutes: Seconds: field.

Validation Time
Denotes the length of time required to confirm that the change has been successful. Hours: Minutes: Seconds: field.

Duration
This is the sum of the Implementation time, Backout time and validation time fields. At least one of these fields must be completed in order to advance the change past the planning state. Calculated field.

Planned End Date
Denotes the anticipated completion date of work. This field is automatically calculated based on the Duration and the Planned Start field. This is a date/time field.

Why is the Change being expedited?
Records the business justification for advancing the change outside the normal process. This is a journal field. This field is required when the change type is comprehensive expedited.

Actual Start Date
Denotes when the work was begun. This is a date/time field.

Actual End Date
Denotes when the work ended. This is a date/time field.

Change, Blackout, and Test Plan Tab – Documents all of the plans related to the change.

Change Plan
Documents the steps leading to the implementation of the change. This is a journal field.

Backout Plan
Documents the recovery steps that will be taken in the event that the change fails.
| **Test Plan** | Documents the steps that will be taken to ensure that the change is working. This is a journal field |
| **Change Impact Tab** – *Documents the impact of the change on the enterprise.* |
| **Does this change impact the enterprise?** | Records impact on the enterprise. When the value is set to Yes the Planned Start Date and Planned End Date is checked against all Blackout calendars. If the change ticket is set to occur during a blackout period, the IT Director Approver is required for Comprehensive, Expedited Comprehensive, and Routine change types. This is a Yes/No field. |
| **What systems are the target of the proposed change?** | Records the systems impacted by the change. This is a journal field. |
| **What systems are dependent on this change?** | Records the systems that are depending on the change. This is a journal field. |
| **What services will be unavailable during the Change?** | Records systems that will be down during the change. This is a journal field. |
| **Are notifications to stakeholders required?** | This is a Yes/No field. |
| **Who will send notification?** | Indicates the group or individual responsible for the change notification. This is a drop-down field. This field is required when the question, “Are notifications to stakeholders required?” field is marked Yes. |
| **Change Manager Tab** - *The Change Manager tab contains field set at CAB by the Change Manager* |
| **Reviewed by CAB:** | Denotes that the CAB has reviewed the ticket. Checkbox |
| **CAB Work Notes** | Used to document any information pertinent to the change that came up during the CAB review. Journal field |
| **System Info Tab** - *The System Info tab contains fields set by the system* |
| **Active** | The ticket has a status of Active. This is a read only check-box field. |
| **Opened** | Indicates the date/time the Incident form was opened. This is a date and time field and is read only. *Note:* The Created value documents the date and time the ticket was first saved to the database. |
| **Opened By** | The name of the person submitting the ticket. This is a read only text field. This field is populated based on the user’s login information. |
| **Updated** | The date/time the ticket was last modified. This is a date and time field and is read only. |
| **Updated By** | The UCSF ID of the person who last modified the ticket. This is a read only text field. |
| **Closed** | The date/time the ticket state was marked as Complete. This is a date and time field and is read only. |
| **Closed By** | The name of the person who marked the ticket as Complete. This is a read only text field. |
| **Template Type** | Denotes the template that was used to create the Change ticket  
This is a read only text field. |
## Appendix C: Change State Transition Rules

<table>
<thead>
<tr>
<th>State From / State To</th>
<th>Open</th>
<th>Planning</th>
<th>Pending Approval</th>
<th>Scheduled</th>
<th>Work In Progress</th>
<th>Closed Pending Review</th>
<th>Closed</th>
<th>Cancelled</th>
</tr>
</thead>
<tbody>
<tr>
<td>New ticket (not yet submitted)</td>
<td>All Change Types</td>
<td>All Change Types</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>All Change Types</td>
</tr>
<tr>
<td>Open</td>
<td></td>
<td>All Change Types</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>All Change Types</td>
</tr>
<tr>
<td>Planning</td>
<td></td>
<td>Routine or Emergency only</td>
<td>All Change Types</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>All Change Types</td>
</tr>
<tr>
<td>Pending Approval</td>
<td>Comp or Exp Comp Only</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Comp or Exp Comp Only</td>
</tr>
<tr>
<td>Scheduled</td>
<td>All Change Types</td>
<td></td>
<td>All Change Types</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>All Change Types</td>
</tr>
<tr>
<td>Work In Progress</td>
<td></td>
<td></td>
<td></td>
<td>All Change Types</td>
<td></td>
<td></td>
<td></td>
<td>All Change Types</td>
</tr>
<tr>
<td>Closed Pending Review</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>All Change Types</td>
</tr>
</tbody>
</table>
