Ticket management in the ITSM tool user guide

Overview

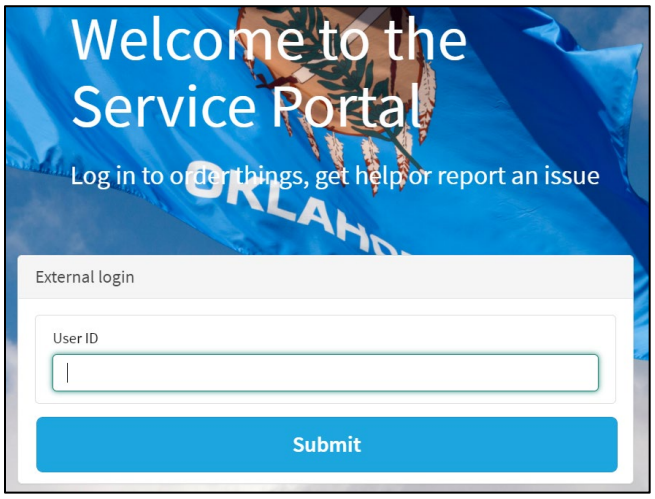
OMES IS uses the ITSM tool to work incidents and requests for customers. This guide is meant to familiarize employees who work incident and request tickets in the ITSM tool.

Steps

Login

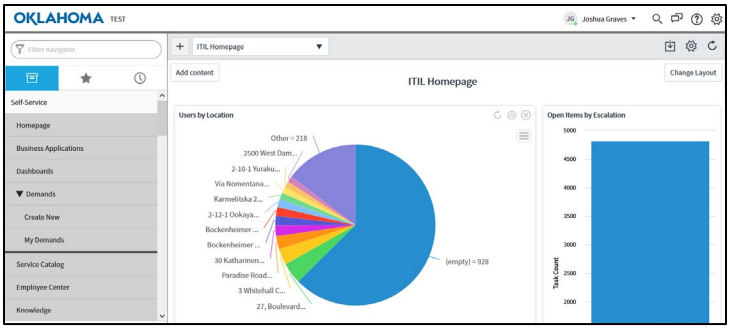
Step 1: Go to https://oklahoma.service-now.com.

Step 2: The ServiceNow login page will appear. Enter your state email address and select the **Submit** button.



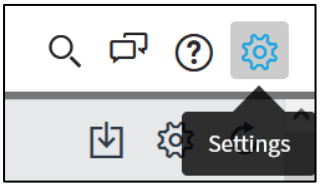
Step 3: Login with your organizational account.

The ITIL Homepage appears. The **Oklahoma** link in the top left corner is a home button that will return you to this page.

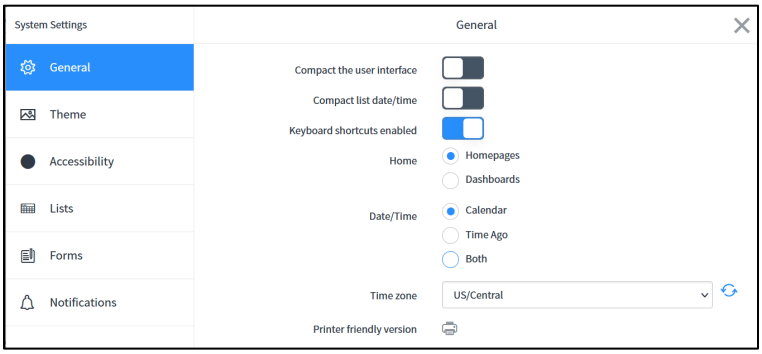


IT Agent dashboard

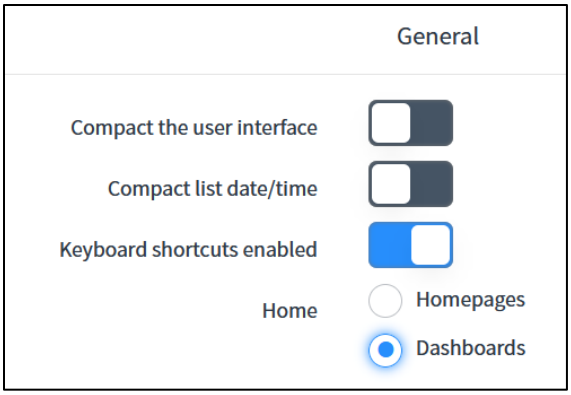
Step 1: Employees who work IT tickets will want to navigate to the IT Agent dashboard. Select the **Settings** icon in the top right corner.



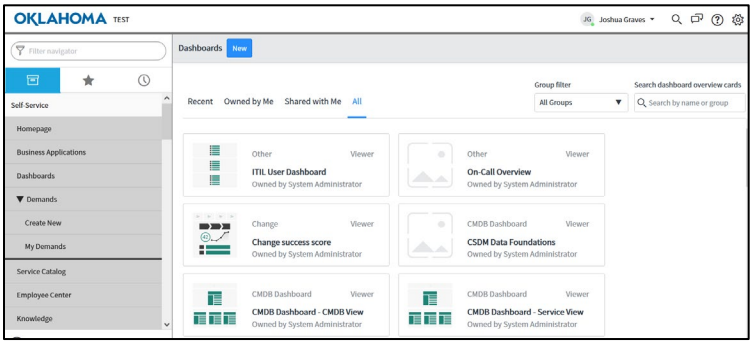
The System Settings screen appears.



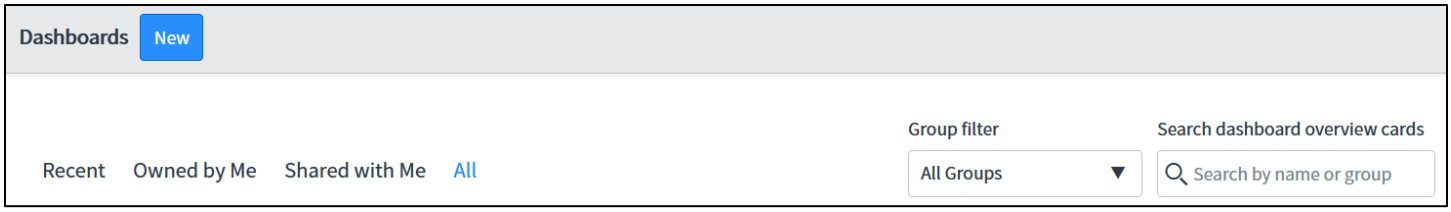
Step 2: In the General tab, select **Dashboards** for the Home option. Then select the **X** in the top right corner of the window to close System Settings. In the ITIL Homepage, select **Oklahoma** in the top left corner to refresh the page. You can also refresh your browser.

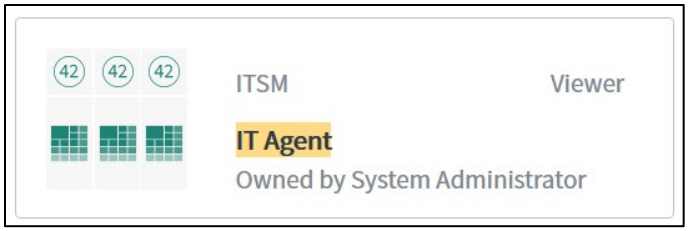


The homepage should now appear different, appearing in Dashboards view.

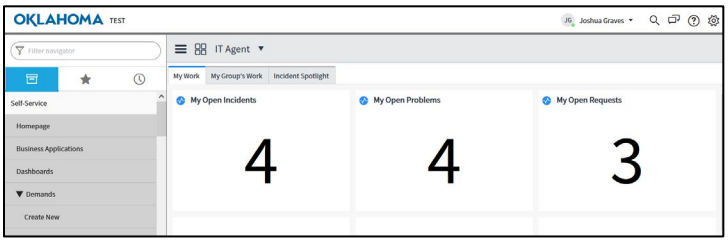


Step 3: In the Dashboards window, ensure that the **All** tab is selected. Then type **IT Agent** in the Search dashboard overview cards field. The options will populate as you type. Select the **IT Agent** dashboard.

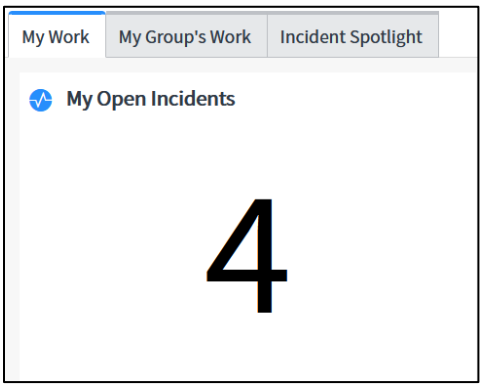


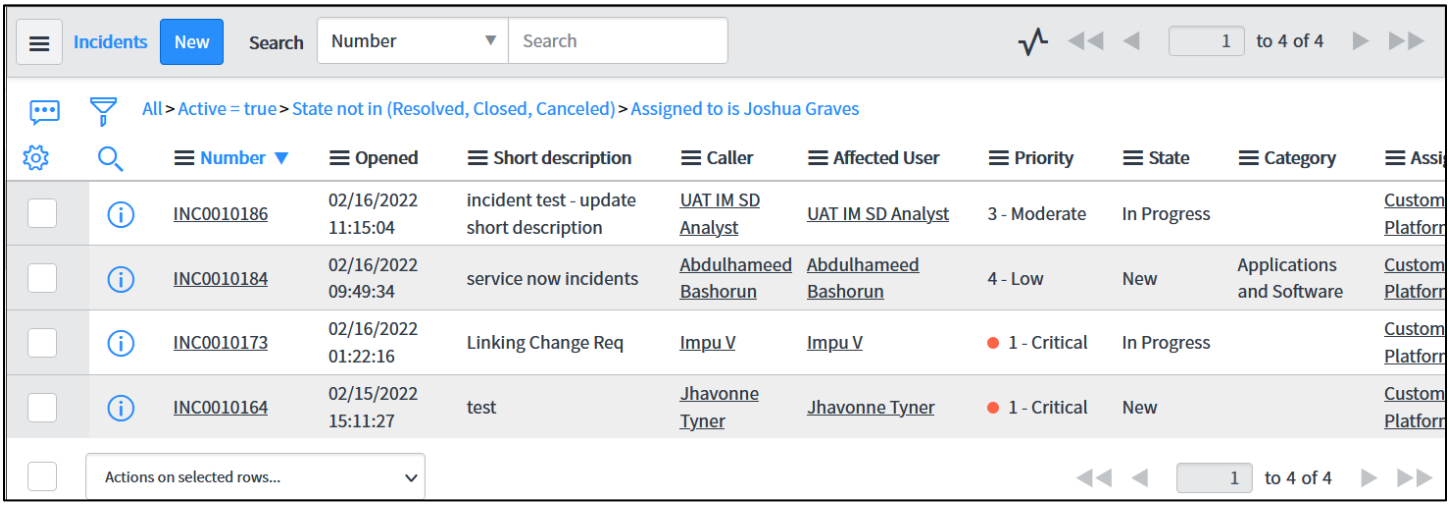


The IT Agent dashboard appears. This dashboard allows you to see open incidents, problems and requests assigned to you, as well as those assigned to your team(s).

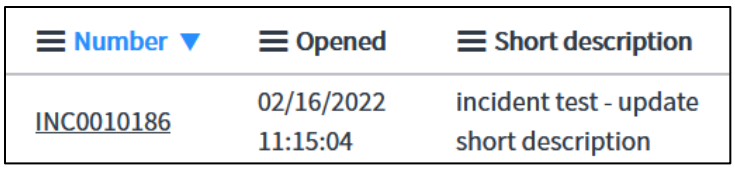


Step 4: In the My Work tab, select the number in the My Open Incidents box to view your open incidents. This displays all of the user's open incidents, including their incident numbers, the date and time they were opened, a short description of the incident, the name of the caller, the incident's priority, etc.



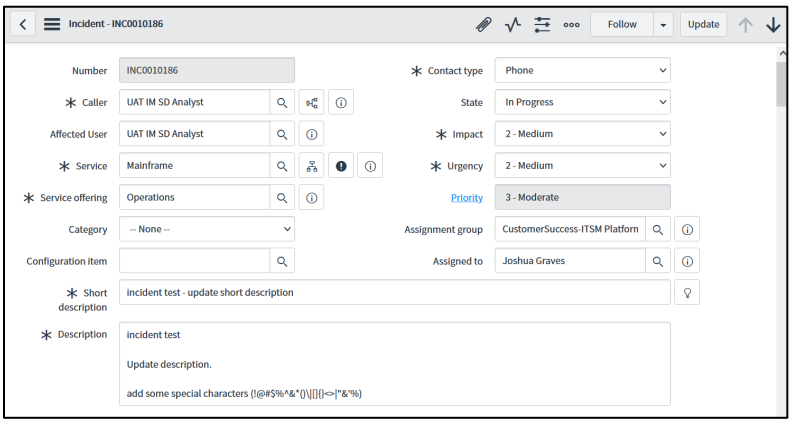


Step 5: Select the incident number to open the incident.

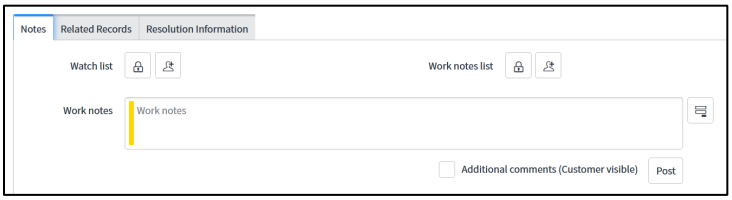


The incident window appears. You can update the fields by typing or by selecting the magnifying glass. Fields with an asterisk are required.

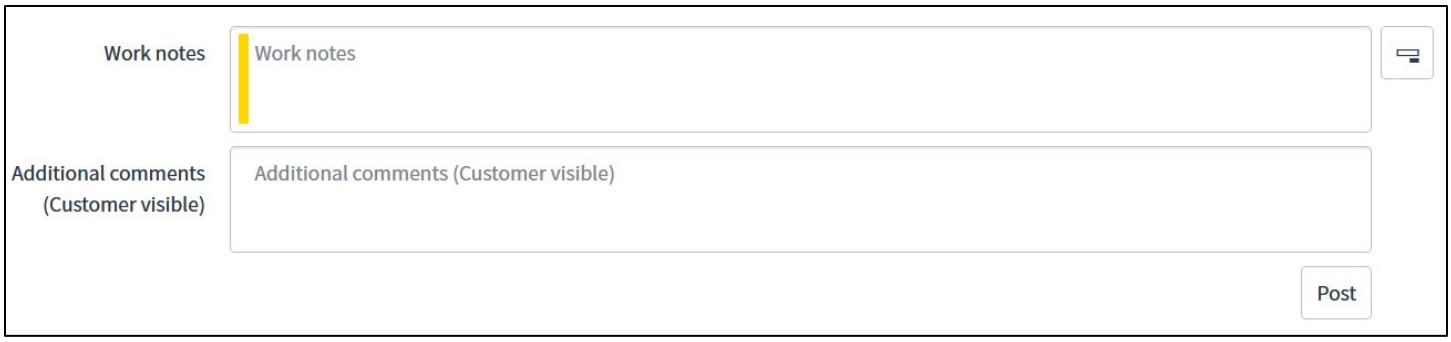
Ticket fields are locked to the assignment group, except for the Assignment group field, the Assigned to field and the Notes.



Step 6: Scroll down to the Notes section. There are two types in most incidents, internal notes and notes that are visible to the customer. To enter an internal note, type in the Work notes field and select **Post**.

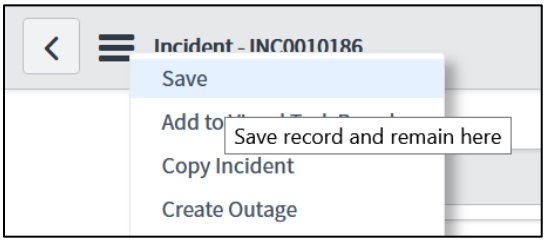


Step 7: You also have the option to email the customer a note. To do this, select the **Show all journal fields** icon to the right of the Work notes field. This adds the Additional comments (Customer visible) field below the Work notes field. Any note posted in this field is emailed to the customer from the Service Desk. **If you use this field, use appropriate language and avoid technical jargon or acronyms that could be unfamiliar to a customer.**

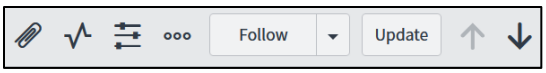


When saving a record, you have two options. You can either **Save** a record and remain on that record, or you can **Update** a record and return to the list view.

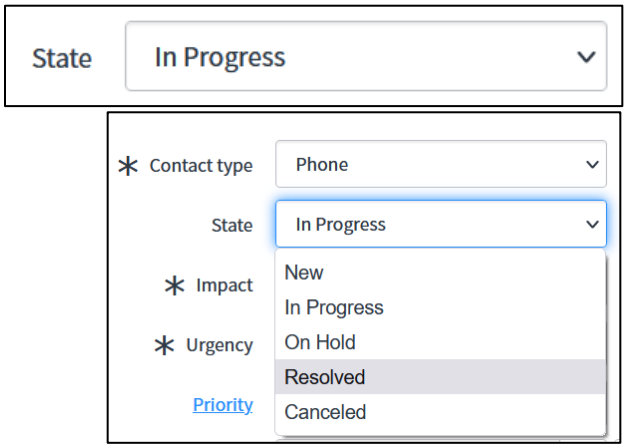
Step 8: Select the **Hamburger** icon in the top left corner and then select **Save** to save the record and remain on that record.



When you want to save any updates made to a record and return to the list view, select **Update** in the top right corner.



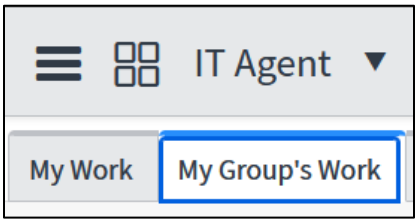
Step 9: When an incident is ready to be resolved, update the **State** of the incident to **Resolved**.



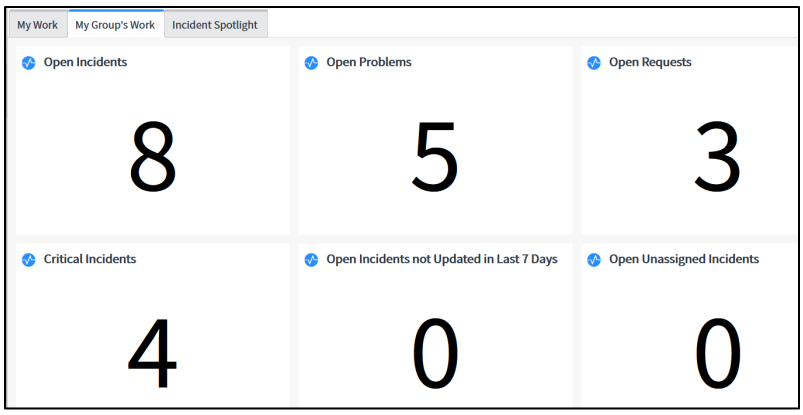
Step 10: Once the State has been updated to Resolved, scroll down to the Notes section. You will notice an asterisk next to the Resolution Information tab. This indicates there are fields that need to be updated to resolve the incident. Update the **Resolution code** field to the appropriate code. Then update the **Resolution notes** field with a detailed note of the resolution. Make sure this note is useful as the resolution of the incident. When completed, be sure to either **Save** and/or **Update** the incident.

Step 11: Select **Oklahoma** in the top left corner to return to the IT Agent dashboard. You can select the numbers in the My Open Problems and My Open Requests boxes to see detailed information for those as well. When finished looking, return to the IT Agent dashboard.

Step 12: In the IT Agent dashboard, select **My Group's Work**.



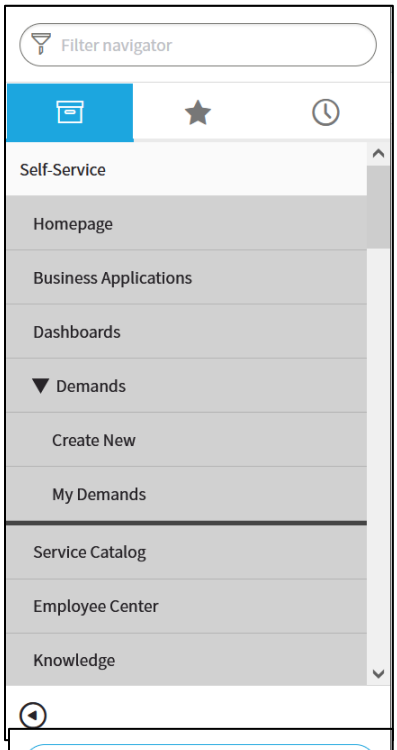
The My Group's Work view appears. This displays your team's open incidents, open problems, open requests, critical incidents, open incidents not updated in the last seven days and open unassigned incidents. You can select the number in each box to view detailed information about the open tickets.



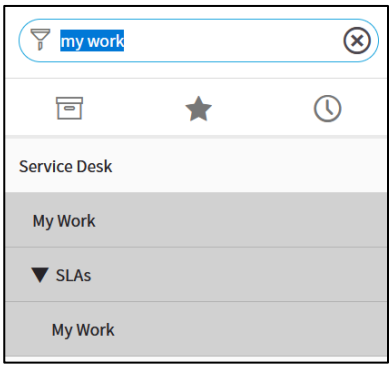
Navigator

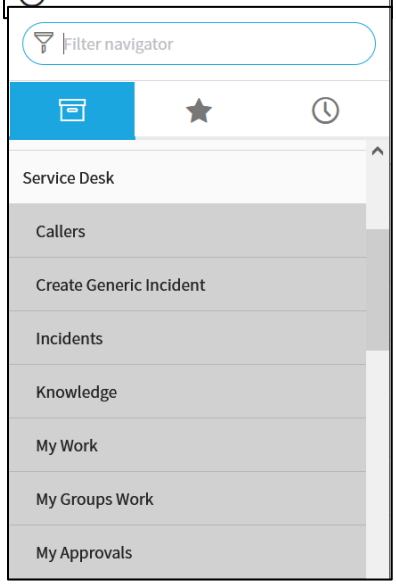
The menu on the left side of the screen is called the Navigator. It has three tabs at the top: All applications, Favorites and Your history. The Navigator can be used for easier navigation within the ITSM tool.

- All applications features a list of all available applications.
- Favorites features a list of the applications selected as a favorite by the user.
- Your history features a list of the user's most recently visited applications.

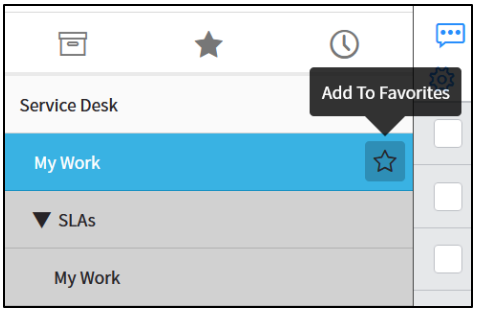


Step 1: Locate **My Work** in the Navigator. You can do this one of two ways. One way is to type **my work** in the Filter navigator field at the top of the Navigator. The other is to select **Service Desk** in the Navigator and locate **My Work** beneath Service Desk.

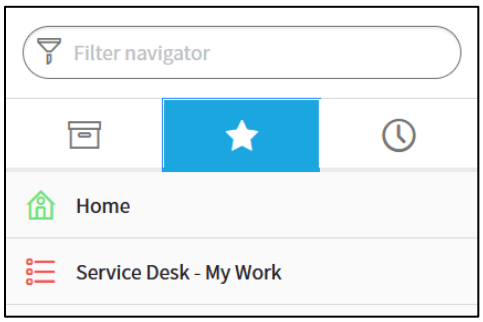




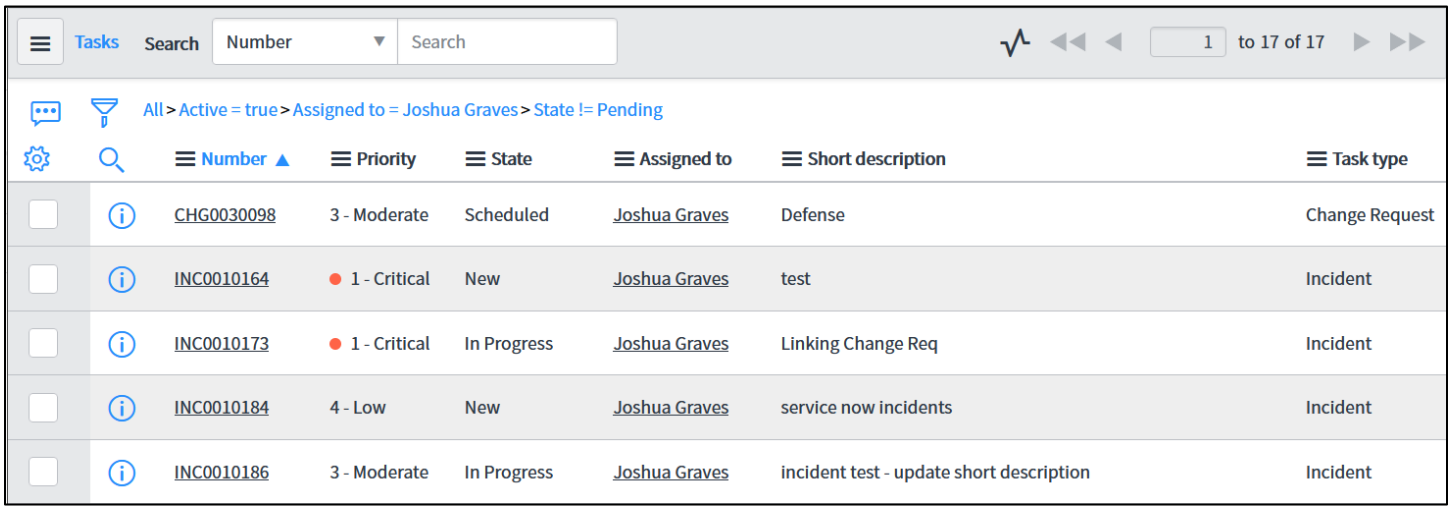
Step 2: Select the **Add To Favorites** star icon to add My Work to the Favorites tab.



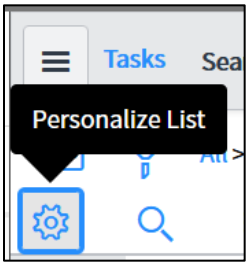
Step 3: Select the **Favorites** tab at the top of the Navigator. You should now see **Service Desk – My Work** listed in the Favorites tab. Select **Service Desk – My Work**.

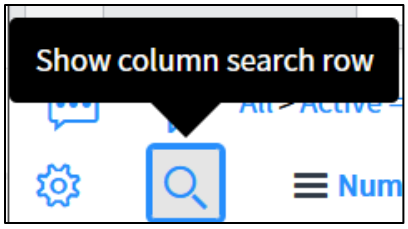


- The screen right of the Navigator now displays all of the items assigned to you. This may include items not shown on the IT Agent dashboard, such as change requests and problem tasks.



- The icons in the top left corner of the window provide extra functionality:
    - The **Personalize List** icon allows the user to personalize which columns are shown.



    - The filter icon allows the user to adjust the filter conditions.

- The magnifying glass allows the user to search the fields displayed for specific criteria.