

# Service Operations Workspace

## Productivity and Getting Started Tips

Created 07/04/2023

Last modified: July 2023

## Table of Contents

Introduction .....	3
Basic Features.....	3
<b>Dashboard:</b> .....	<b>3</b>
<b>Incident Management:</b> .....	<b>3</b>
<b>Problem Management:</b> .....	<b>3</b>
<b>Change Management:</b> .....	<b>3</b>
<b>Service Catalog:</b> .....	<b>3</b>
<b>Knowledge Management:</b> .....	<b>3</b>
<b>Reporting and Analytics:</b> .....	<b>3</b>
Process Scope .....	4
Starting your Day: Service Operations Workspace.....	4
ITSM Ticket Management Life Cycle .....	5
<b>Ticket Creation:</b> .....	<b>5</b>
<b>Manage Ticket Categorization and Prioritization:</b> .....	<b>5</b>
<b>Assignment and Ownership:</b> .....	<b>6</b>
<b>Ticket Tracking and Updates:</b> .....	<b>7</b>
<b>Escalation and SLA Management:</b> .....	<b>7</b>
<b>Collaboration and Communication:</b> .....	<b>7</b>
<b>Resolution and Closure:</b> .....	<b>7</b>
<b>Ticket Analysis and Reporting:</b> .....	<b>7</b>
Quick links .....	8
<b>Quick Link Setup</b> .....	<b>8</b>
Templates in Service Operations Workspace.....	9
<b>Templates Setup</b> .....	<b>9</b>
<b>Template Example Starters:</b> .....	<b>9</b>
<b>Sample Acknowledge Template:</b> .....	<b>10</b>
<b>Sample Good News Knowledge Solution:</b> .....	<b>11</b>
Other Service Operations Workspace ITSM References .....	12

# Introduction

ServiceNow Service Operations Workspace provides a centralized and comprehensive platform for managing service operations, enabling organizations to optimize their IT service management processes, enhance productivity, and deliver high-quality services to their users and customers.

## Basic Features

### Dashboard:

The dashboard is the central interface of Service Operations Workspace. It provides a customizable and intuitive view of key metrics, KPIs, and real-time data related to service operations. Users can personalize their dashboard to display the information and visualizations most relevant to their role and responsibilities.

### Incident Management:

This component focuses on the management and resolution of incidents. It allows users to create, track, and prioritize incidents, assign them to appropriate teams or individuals, and ensure timely resolution. Incident Management in Service Operations Workspace provides features such as incident categorization, assignment rules, SLA management, and collaboration tools for efficient incident resolution.

### Problem Management:

Problem Management addresses the root causes of incidents to prevent their recurrence. It helps identify and investigate underlying issues, initiate corrective actions, and manage the problem resolution process. Service Operations Workspace includes capabilities for problem identification, prioritization, investigation, and collaboration to facilitate effective problem management.

### Change Management:

Change Management ensures that changes to IT services and infrastructure are implemented in a controlled and coordinated manner. It helps minimize disruptions, mitigate risks, and ensure compliance with organizational policies and procedures. Service Operations Workspace includes features for creating, reviewing, approving, and tracking change requests, as well as managing change workflows and communication.

### Service Catalog:

The Service Catalog component allows users to request IT services and resources through a user-friendly and self-service portal. It provides a catalog of available services, along with relevant information, descriptions, and options for users to select from. Service Catalog in Service Operations Workspace streamlines the service request process, automates fulfillment workflows, and provides transparency to users regarding their service requests.

### Knowledge Management:

Knowledge Management enables the creation, organization, and sharing of knowledge articles to support incident resolution and self-service. It allows users to access a centralized knowledge base to find solutions, workarounds, and best practices. Service Operations Workspace incorporates Knowledge Management to improve the efficiency of incident resolution and empower users with self-help resources.

### Reporting and Analytics:

Reporting and analytics capabilities are integral to Service Operations Workspace. They provide insights into service performance, trends, and areas for improvement. Users can generate reports, visualize data through charts and graphs, and leverage analytics tools to make data-driven decisions and optimize service operations.

## Process Scope

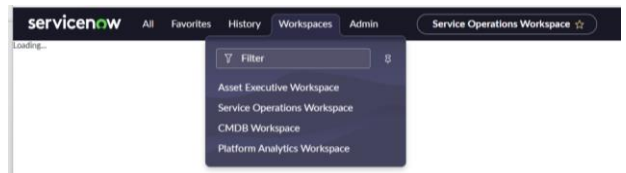
The scope of Service Operations Workspace includes centralized IT Service Management functionality for: Incident Management

- Problem Management
- Change Management
- Request Management
- Priority based Actionable ITSM view / reporting.
- Team Service Delivery Analytics

## Starting your Day: Service Operations Workspace

Navigate to the Service Operations application. Usually it is the default window, or in the workspaces menu bar at the top of your navigation screen.

Once in the Service Operations application, begin workday planning from the Service Operations Workspace homepage.



1. Review the dashboard widgets and charts for an overview of service operations, including open incidents, major incident status, response time, and relevant KPIs.
2. Identify critical incidents or tasks highlighted in widgets or separate lists.
3. Prioritize work based on immediate attention or specific deadlines.
4. Access incident or task details, update status, assign to teams, provide resolutions, or collaborate with stakeholders.
5. Regularly check for new incidents, updates, or requests using filtering and search.
6. Use collaboration features to communicate, document progress, and share information.
7. Continuously update incident/task status, progress, and resolution for clear records and effective communication.
8. Utilize ServiceNow knowledge base and resources for solutions and troubleshooting.
9. Monitor and update dashboard widgets to track service operations performance.
10. Review pending incidents/tasks for the next day and update status or assignment.
11. Log out of ServiceNow instance when finished.

# ITSM Ticket Management Life Cycle

## Ticket Creation:

New ITSM tickets can be created by the “bulleted” list view icon from the Service Operations Workspace, allowing new tickets to be created for IT personnel raise an Interaction, Walk Up Tickets, Incident, Problem, or Request or Service Catalog Tasks, Changes, Tasks, CMDB, Knowledge.

You can use or [Configure your own customized filtered list in Service Operations Workspace](#)

To create [Incident Management Tickets in Service Operations Workspace](#) from the list view in Service Operations Workspace, follow these steps:

1. Navigate to the Service Operations Workspace in ServiceNow.
2. Access the list view of tickets by selecting the appropriate module or navigating to the desired ticket list type from the list view, such as "Incidents" or "Service Requests."
3. Review the list of existing tickets and identify if there is an option to create a new ticket directly from the list view. Look for a button or link that allows ticket creation.
4. Click on the "Create New" or similar button/link associated with ticket creation.
5. A new ticket form will appear, containing fields and information required to create a ticket. Fill in the necessary details, such as the ticket description, priority, category, and any other relevant information.
6. Once you have provided all the required information, click the "Submit" or "Create" button to create the new ticket.
7. The system will generate a new ticket with a unique identifier and store it in the appropriate module or list. The ticket will now be available for further actions, assignment, and tracking.

Note: The specific steps may vary depending on the configuration and customization of your ServiceNow instance. If you cannot find a direct option to create a new ticket from the list view, you may need to navigate to the ticket creation form through alternative means, such as using the application navigator or accessing the ticket module directly.

## Manage Ticket Categorization and Prioritization:

When a ticket is created, it is categorized based on the type of issue or request, such as software, hardware, network, or access related. The ticket is then prioritized based on its impact and urgency, determining the order in which it should be addressed.

Working on the highest priority and greatest impact in a constantly changing environment can be tricky, but here is how to use Service Operations Workspace to improve your work prioritization with current state tickets.

1. Familiarize yourself with the dashboard widgets and charts available such as the number of open tickets, their priority status, due dates, tickets due today, unassigned tickets for my team, and tickets nearing SLA breach.
2. Review the widgets and identify the ones that are most relevant to your ticket management responsibilities. For example, you may focus on widgets displaying high-priority incidents, overdue tickets, or tickets assigned to you.
3. Prioritize your ticket management work based on the information provided by the widgets. Identify critical or high-priority tickets that require immediate attention or have specific deadlines.
4. Use the filtering and search capabilities of the workspace to narrow down your view and focus on specific types of tickets or criteria. For example, you can filter by ticket status, priority, assignment group, or specific categories.

5. Click on a ticket to access its details and take necessary actions. This may involve updating the ticket status, assigning it to the appropriate team or individual, adding comments or attachments, or collaborating with stakeholders.
6. Continuously monitor the workspace for new tickets, updates, or requests that require your involvement. Regularly refresh the workspace or use the auto-refresh feature if available to stay up to date with ticket changes.
7. As you work on tickets, use the collaboration features within ServiceNow to communicate with your team members, document progress, and share relevant information.
8. Update the ticket status, progress, and resolution details as you work on them to maintain a clear record of actions taken. This helps in effective communication with stakeholders and tracking the ticket's lifecycle.
9. Regularly review and update the dashboard widgets to track the overall performance of your ticket management work. Pay attention to any trends, areas of improvement, or potential bottlenecks indicated by the metrics.
10. Prioritize your ticket management tasks based on their urgency, impact, and alignment with business priorities. Allocate your time and effort accordingly to ensure critical tickets are addressed promptly.
11. At the end of your work session, review any pending tickets that need to be carried forward to the next day and update their status or assignment accordingly.
12. Log out of your ServiceNow instance when you have completed your work.

### **Assignment and Ownership:**

The ticket is assigned to the appropriate support team or individual based on their skills, expertise, and workload. This ensures that the ticket is handled by the most suitable resource who can address the issue effectively.

1. Access the Service Operations Workspace and navigate to the incident ticket list view.
2. Prioritize incidents ownership based on their impact and urgency, ensuring critical incidents receive immediate attention.
  - a. Collaborate effectively by leveraging the communication and collaboration features within ServiceNow, such as comments, attachments, or group chats.
  - b. Regularly check for updates or new comments on the incident ticket to stay informed of any changes or additional information.
  - c. Be proactive in sharing knowledge and documenting the incident resolution process to contribute to the organization's knowledge base and facilitate future incident management.
  - d. Communicate transparently and provide timely updates to users, customers, or other stakeholders affected by the incident.
3. Identify the incident ticket assigned to you or requiring your attention based on filters or search criteria.
  - a. Click on the incident ticket to access its details and take ownership of it.
  - b. Review the ticket information, including the description, priority, impacted services, and any available notes or comments.
  - c. Familiarize yourself with the incident ticket's history, including previous actions taken and related communications.
4. Ticket Acknowledgement: Acknowledge the incident ticket promptly to communicate your awareness of the issue and your commitment to addressing it.
  - a. Update the ticket status or add an acknowledgement comment to indicate that you have taken ownership and are actively working on it.
5. Quick Templates:
  - a. If there are predefined acknowledgement templates or actions in your organization's processes use them to streamline communications or make your own.
6. Knowledge Sharing
  - a. Search for existing relevant knowledge base articles or resources exist for the incident or similar incidents, search and review them to gather insights or potential solutions.

- b. When you do not find knowledge to solve a problem [Create a knowledge article from an incident](#) or by [importing Word documents](#), to document the incident and its resolution for future reference.

### **Ticket Tracking and Updates:**

Throughout the ticket lifecycle, updates and progress are tracked in real-time. Support agents document their actions, including troubleshooting steps taken, communication with the user, and any solutions implemented. Users can also track the status of their tickets and receive notifications about updates.

1. Keep the ticket current with progress and next steps:
  - a. Share knowledge and collaborate with your team members or other stakeholders involved in the incident resolution process.
  - b. Add comments or notes to the incident ticket to provide updates, document progress, or share relevant information.
  - c. Next Steps for Managing the Incident Ticket:
2. If you cannot resolve on your own, and there is no knowledge solution, analyze the incident ticket and its impact to determine appropriate next steps.
  - a. Collaborate with other support teams or subject matter experts as needed to investigate and diagnose the issue further.
  - b. Follow incident management best practices, such as adhering to predefined response and resolution timeframes.
  - c. Communicate with the affected users or customers, providing updates on the progress and expected resolution time.
  - d. Take necessary actions to resolve the incident, which may involve troubleshooting, implementing workarounds, or engaging other resources.
  - e. Regularly update the incident ticket's status, progress, and resolution details as you work on it.
  - f. Communicate with stakeholders involved in the incident ticket, keeping them informed of any changes or updates.

### **Escalation and SLA Management:**

If a ticket is not resolved within the defined timeframe or if it requires higher-level intervention, it can be escalated to the next level of support or management. Service level agreements (SLAs) are monitored to ensure that tickets are resolved within the agreed-upon timeframes.

### **Collaboration and Communication:**

Service Operations Workspace facilitates collaboration and communication among support teams, enabling them to work together to resolve tickets efficiently. Internal chat systems, comments, and notifications help streamline communication and keep all stakeholders informed.

### **Resolution and Closure:**

Once the issue or request has been resolved, the ticket is marked as resolved or closed. This includes validating the solution with the user, ensuring their satisfaction, and obtaining any necessary approvals.

### **Ticket Analysis and Reporting:**

Service Operations Workspace provides analytics and reporting capabilities to analyze ticket data, identify trends, measure performance metrics, and generate insights for continuous improvement.

# Quick links

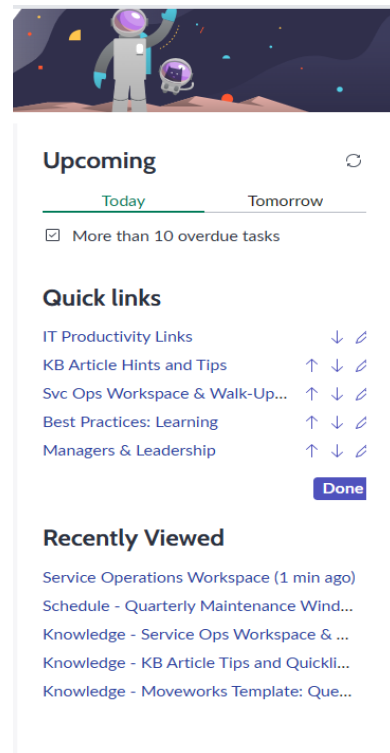
## Quick Link Setup

Quick links are customizable shortcuts that provide direct access to frequently used links within the ServiceNow platform. They eliminate the need to navigate through menus and enable users to quickly access specific records, forms, or applications. Personalized for each user's role, Quick links enhance productivity by streamlining navigation and allowing for tailored workflows.

[Add a quick link on the ITSM landing page](#)

## Quick Links: Useful ServiceNow References

- System User:** To view system users in ServiceNow, you can navigate to the following URL:
  - URL: `https://[instance_name].service-now.com/sys_user_list.do`
  - Replace [instance\_name] with your ServiceNow instance name.
- Category and Subcategory Lists:** To access the list of categories and subcategories in ServiceNow, you can use the following URLs:
  - Category List: `https://[instance_name].service-now.com/sc_category_list.do`
- Subcategory List:** `https://[instance_name].service-now.com/sc_category_subcategory_list.do`
  - Replace [instance\_name] with your ServiceNow instance name.
- Knowledge:** The URL for accessing the Knowledge Dashboard in ServiceNow may vary depending on your specific instance and configuration. However, a common URL pattern for the Knowledge Dashboard is:
  - `[instance_name].service-now.com/nav_to.do?uri=%2F$pa_dashboard2.do%3Fsysparm_stack%3Dno`
  - Replace [instance\_name] with your actual ServiceNow instance name to access the Knowledge Dashboard.
- Dashboards:** To access the Dashboards in ServiceNow, you can use the following URL pattern:
  - `[instance_name].service-now.com/nav_to.do?uri=%2Fdashboards.do`
  - Replace [instance\_name] with your actual ServiceNow instance name to access the Dashboards.
- Reporting:** The Reporting module in ServiceNow can be accessed using the URL:
  - `[instance_name].service-now.com/sys_report_home.do`
  - Replace [instance\_name] with your actual ServiceNow instance name to access the Reporting module.
- User Lookup:** To perform a user lookup in ServiceNow, you can use the following URL:
  - `[instance_name].service-now.com/nav_to.do?uri=%2Fsys_user.do`
  - Replace [instance\_name] with your actual ServiceNow instance name to access the User Lookup feature.
- Task Routing:** Task routing can vary depending on the task type and process. The URL to determine routing for tasks can be specific to the task table. For example:
  - Incident Tasks: `[instance_name].service-now.com/nav_to.do?uri=%2Fincident_task.do`
  - Change Tasks: `[instance_name].service-now.com/nav_to.do?uri=%2Fchange_task.do`
  - Replace [instance\_name] with your actual ServiceNow instance name and the appropriate task table URL to access the task routing functionality.





## Templates in Service Operations Workspace

ServiceNow offers various workspace templates designed for different aspects of IT service management. These templates help organizations streamline their processes and enhance productivity within the ServiceNow platform.

Your ServiceNow Platform Administrator can create shared templates using widgets and look ups; however it is also possible to create your own custom templates for streamlining your communications.

- “ALL” includes the system templates if they exist. “
- My Templates” is a list of your created and available templates. If you do not have any templates created, consider using this tip to create some time saving templates you can share to create an effortless and positive customer experience.

### Templates Setup

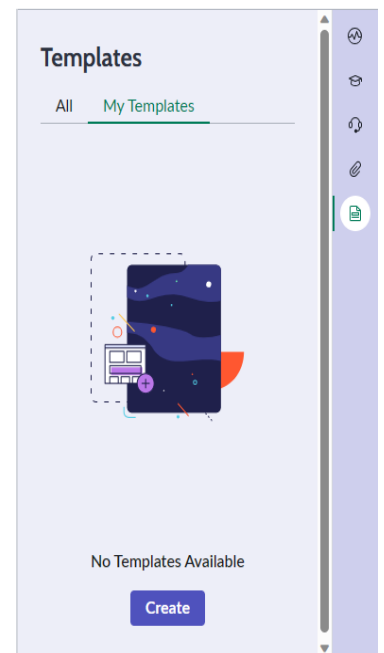
- a. Log in to your ServiceNow instance with appropriate administrative privileges.
- b. From within your ticket, for example: in an Incident Ticket, Navigate to the Workspace Templates widget that is in the “right hand icon” in your active ticket and appears as a “document” icon.
- c. Click on "Create New" or a similar option to start creating a new workspace template.
- d. Provide a name and description for the template to help identify its purpose.

### Template Example Starters:

Keep a well-formatted list of templates, if they are yours, you can customize them. If developing them for the platform, you can include basic information like “System Contact information” and “System URL to Database” and keep the information that needs to be populated in the template, click the template to apply it to the Incident, then customize it.

Some Examples during the life cycle might include templates for:

- Acknowledging and introducing your self
- Known Knowledge Solution for your request.
- What you validated in a ticket, why you are transferring, and what the next steps are
- Closure protocol to include what was reported, how you confirmed resolution, general knowledge base reference.



## Sample Acknowledge Template:

Short Description: Incident Quick Templates for Incident Ticket Management

Description:

Dear [User's Name],

Thank you for reaching out to our support team regarding the incident you reported. This email serves as an acknowledgment that we have received your ticket and are actively working on resolving the issue. Your incident has been assigned the following reference number: [Incident Number].

Our team is dedicated to providing timely assistance and will make every effort to resolve the incident as quickly as possible. We understand the impact this issue may have on your work, and we assure you that we are prioritizing it accordingly.

Here are a few key details regarding your incident:

Incident Number: [Incident Number]

Incident Description: [Brief description of the incident]

Date and Time Reported: [Date and time the incident was reported]

Please note that our support team may contact you for additional information or updates regarding the incident. If you have any further details or have experienced any changes in the situation, please feel free to reply to this email or contact our support line at [Support Contact Details].

We will keep you informed of any progress made on the incident. In the meantime, if you have any urgent concerns or questions, please do not hesitate to reach out.

Thank you for your patience and understanding as we work towards resolving this incident. We apologize for any inconvenience caused and appreciate your cooperation.

Best regards,

[Your Name]

[Your Role/Title]

[Your Organization Name]

[Contact Information]

\* Check our Knowledgebase at: Knowledge Base URL: [instance\_name].service-now.com/nav\_to.do?uri=%2F\$pa\_dashboard2.do%3Fsysparm\_stack%3Dno

## Sample Good News Knowledge Solution:

Short Description: Good News Knowledge for your Incident Ticket - [Incident Number]

Description:

Dear [User's Name],

We would like to provide you with an update regarding the incident you reported. Our team has successfully resolved your request by utilizing a known solution from our knowledge base. We appreciate your patience and cooperation throughout the process.

Here are the details of the incident:

Incident Number: [Incident Number]

Incident Description: [Brief description of the incident]

Date and Time Reported: [Date and time the incident was reported]

Resolution Method: Knowledge Base Item

We have utilized the following knowledge base item to address your request:

Knowledge Base Item: [Knowledge Base Item Title/Reference]

Solution Description: [Brief description of the solution]

By following the instructions provided in the knowledge base item, we were able to resolve the issue effectively and efficiently. We encourage you to consult our knowledge base in the future, as it contains a wealth of information and troubleshooting guides to assist with similar incidents.

If you have any further questions or encounter any issues related to this incident, please don't hesitate to reach out to our support team. We are here to assist you and ensure a seamless experience.

Thank you for your cooperation, and we apologize for any inconvenience caused. We greatly appreciate your understanding and the opportunity to resolve your request promptly.

Best regards,

[Your Name]

[Your Role/Title]

[Your Organization Name]

[Contact Information]

\* Check our Knowledgebase at: Knowledge Base URL: [instance\_name].service-now.com/nav\_to.do?uri=%2F\$pa\_dashboard2.do%3Fsysparm\_stack%3Dno

## Other Service Operations Workspace ITSM References

See Other related Documented Service Operations Workspace Concepts:

- [Change Management in Service Operations Workspace](#)
- [Incident Management in Service Operations Workspace](#)
- [Interaction Management in Service Operations Workspace](#)
- [Knowledge Management in Service Operations Workspace](#)
- [On-Call Scheduling in Service Operations Workspace](#)
- [Problem Management in Service Operations Workspace](#)
- [Recommendation Framework in Service Operations Workspace](#)
- [Request Management in Service Operations Workspace](#)
- [ServiceNow integrations with Microsoft Teams in Service Operations Workspace](#)
- [Service Level Management in Service Operations Workspace](#)
- [Walk-up Experience management in Service Operations Workspace](#)
- [Workforce Optimization for ITSM in the Service Operations Workspace](#)