

Title: UCF IT Problem Management – Problem Record Procedure	Effective: 05/11/2018
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Approved By: Michael Sink, Associate VP & COO, UCF IT	Page 1 of 28

		R	evision Histor	y
	Revision (Rev)	Date of Rev	Owner	Summary of Changes
	Section I; Updated title & body	10/31/2018	Scott Baron	Updated title and paragraph body verbiage
I.	DOCUMENT CONT	ROL AND API	PROVALS	
II	. OBJECTIVES			2
Π	I. DEFINITIONS		•••••	
IV	/. SCOPE OF PROBLE	EM RECORD P	ROCEDURI	E DOCUMENT 4
V	. STEPS TO RECORD	PROBLEM RI	ECORD – R	EACTIVE W/ WORKAROUND 4
V	I. STEPS TO RECORD	PROBLEM RI	ECORD – R	EACTIVE W/OUT WORKAROUND12
V	II. STEPS TO RECORD	PROBLEM RI	ECORD – Pl	ROACTIVE 19
V	III. STEPS TO RECORI	PROBLEM RI	ECORD – R	ETRO 20
IХ	K. APPENDIX			
	A. RELATING ACTIV	E (OPENED) IN	ICIDENTS 7	ГО PROBLEM RECORDS 24
	i. From the Pr	oblem Record		
	ii. From the Ind	cident Record –	OneSearch.	
	B. RELATING INACT	IVE (CLOSED)	INCIDENT	S TO PROBLEM RECORDS
	i. From the Pr	oblem Record		
	C. DEFERRING A PRO	BLEM RECOF	RD (HOW T	0)
	D. GENERATING (RU	NNING) A PRO	OBLEM REF	PORT

I. DOCUMENT CONTROL AND APPROVALS

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II. OBJECTIVES

This document is intended to define and describe a consistent process for creating and managing a problem record within the IT service management (ITSM) application (ServiceNow). This document will also walkthrough the root cause analysis (RCA) approval workflow as part of the problem record procedure. The sections below (starting on page four) identify all steps required.

III. DEFINITIONS

Problem Management: Process that investigates the cause of incidents and, wherever possible, implements a permanent solution to prevent recurrence. Until a permanent resolution is applied, the process will attempt to provide a workaround to enable the service to be restored and the incident(s) to be resolved

Problem: A cause of one or more incidents. The cause is not usually known at the time a problem record is created, and the Problem Management process is responsible for further investigation

Reactive Problem Management: Resolving problems in response to one or more active (opened) incidents

Proactive Problem Management: Identifying problems based on periodic scheduled reviews and an analysis of closed incident patterns

Retro Problem Record: If for any reason an Emergency change is implemented without a related ServiceNow incident record, then the accountable UCF IT department is <u>STILL</u> <u>REQUIRED</u> to create a problem record after IT services are restored. The retro problem record will ensure a root cause analysis is completed for historical reference, management review and communication (that may be required)

Incident Management: The process responsible for managing the lifecycle of all incidents. Ensures that normal service operation is restored as quickly as possible (often by means of a temporary workaround)

Incident: Implies something is broken or functioning in a degraded manner. Inquiry from a user to fix something that is broken, not working or needs repair. Also known as a break/fix issue

Workaround: A workaround is a temporary solution to restore service to normal operation while the underlying issue is being investigated. The workaround does not resolve the problem, it resolves the incident

Known Error: The root cause of the problem is established and the affected configuration item (CI) is identified. <u>A temporary workaround/permanent fix may or may not exist</u>



Root Cause Analysis (RCA): The activity that identifies the root cause of a problem

Problem Report: An executive summary report often used when departments inside or outside of UCF IT are requesting a summary report containing the details of the problem

Request for Change (RFC): A request for change is a submitted request within the ITSM application (ServiceNow) for a proposed change to be made to fix the problem

UCF IT (as of May 2018): College of Arts and Humanities, College of Business Administration, College of Education and Human Performance, College of Health and Public Affairs, College of Sciences, Computer Services and Telecommunications, Student Development and Enrollment Services, Center for Distributed Learning, College of Undergraduate Studies, Office of Instructional Resources, Regional Campuses, University Libraries, Human Resources, Graduate Studies and Office of Research & Commercialization

Information Technology Infrastructure Library (ITIL): A set of best practice publications for IT service management. Owned by the Cabinet Office (part of HM Government), ITIL gives guidance on the provision of quality IT services and the processes, functions and other capabilities needed to support them

UCF IT Departments: Sub departments within Enterprise Application Development, Enterprise Systems & Operations, Information Security Office, Program Management and Planning, Technology Sales, Service & Support and Telecommunications

Deferred Problem: The problem record was closed without root cause and workaround determination (e.g., costs are too high to diagnose, value to remove is too low, etc.)

IT Service Management (ITSM) application: This is the application (ServiceNow) used by UCF IT to record incidents, problems, requests and changes

Problem States:

- <u>Open</u> Problem record created. Workaround may or may not be identified
- <u>Known Error</u> Root cause determined and problem record raised as a known error
- <u>Pending Change</u> When the related change record (Normal or Emergency) is created off of the problem record to permanently fix the underlying issue
- <u>Change Successful</u> The related change record to the problem record was implemented successfully
- <u>Closed</u> The related change record was implemented successfully AND the related incidents are in a resolved, closed or in a canceled state
 Or, the problem was deferred
- <u>Canceled</u> At any point, the Problem Owner can cancel the problem record. The problem record cannot be canceled if the problem is already in a closed state



OneSearch: Provides the UCF IT Service Desk and incident assignees insight into relevant knowledge articles, open problems, open incidents, recommended services from the service catalog, changes implemented within the last seven days and changes that are currently in progress

	OneSearc	ch example in	nage that rest	ides on the Ne	w Call and Incid	lent Forms
_	Knowledge Articles	Open Problems 0	Open Incidents 0	Service Catalog 0	Changes Last 7 Days 7	Changes in progress 2

Problem Manager – UCF IT department manager accountable for the problem record resolution assigned to their department (ServiceNow "Assignment group"). The Problem Manager will be required to review and approve the completed root cause analysis within the problem record before the problem record can be closed

Problem Owner – The UCF IT resource responsible for creating a problem record within the ITSM application (ServiceNow) after determining an incident or trend of incidents requires a problem record

IV. SCOPE OF PROBLEM RECORD PROCEDURE DOCUMENT

This procedure document is only intended for ServiceNow users that have an ITIL role (also known as a ServiceNow fulfiller license). The below sections only represent the user interface per the ITIL role.

V. STEPS TO RECORD PROBLEM RECORD – REACTIVE W/ WORKAROUND

This example will walk a Problem Owner through the lifecycle of a problem record using the reactive Problem Management process *with* a workaround identified.

In this scenario, two incidents have been triaged from the UCF IT Service Desk over to the Service Management Solutions Team for a ServiceNow ODBC issue.

With the trend of incidents, the incident assignee determines there is an underlying issue that needs further investigation. The incident assignee creates a problem record from one of the two active (opened) incident records to start the Problem Management process.

1. From the incident record, right click on the grey Incident header bar and select Create Problem

< Incident INC0076387								Save	1	Ø v	± ۱	000	Follow -	Update	Cancel Incide	ent	Print	Lab	el
Number	INC0076387						П	Add to Visual Task Board Create Problem			Priori	ty	3 - Normal			•			
User	Scott Baron Q		н ^а	۲	0	D		Create Request Create Normal Change	I		Opene	ed	03/23/2018 03:59:29	PM					
Preferred Contact Method	Email	•						Create Emergency Change	1		Opened b	у	Scott Baron			Q	۲	0	D
* Email	Scott.Baron@ucf.edu							Metrics Timeline Follow on Live Feed	1	* 6	ntact typ	e	Email			•			
Location	Q							Show Live Feed	1		Sta	te	Active			•			
Department	AA-INFO TECHNOLOGIES & RES		۲	1				Insert Insert and Stay	4	Assignr	nent grou	ıp	Service Managemen	t Solutions	s Team	Q	۲		D
Configuration item	ServiceNow ODBC Driver		å	0		۲		Configure >	2	,	ssigned	to	Chris Martineau			Q	۲		D
	[]	Û					Export > View >	5	Ci	talog Ite	m							



A problem record will be created off the incident record. The Configuration item (CI), Short description, Description, Assignment group and Assigned to fields from the incident record will be carried over to the newly created problem record.

The Short description and Description fields should be modified to summarize the problem: (Short description ~ one sentence) & (Description - high-level overview). **NOTE**: The Problem Owner (Assigned to field) of the problem may be different from the incident assignee(s) and can be adjusted accordingly.

< Problem PRB0040129			pdate Problem Report Request Approval	Show Workflow Delete	\uparrow
Number	PRB0040129	Opened	03/23/2018 04:29:59 PM		
Configuration item	ServiceNow ODBC Driver Q. 50 0	Opened by	Scott Baron	0, 10 (j	
	0	Approval	Not Yet Requested		
Change request		State	Open		
Known error		:)⊱ Assement group	Service Management Solutions Team	Q 🗶 🕕	
Workaround	2	* Assigned to	Chris Martineau	Q, 🗶 🛈	
Problem Description Notes Root Cause Analys	sis Workaround Closure Information				
* Short description	ServiceN w ODBC Driver Issue Reported			8	
>ic Description	Driver er pr stating unable to connect. Multiple users impacted. College of Excellence i	s unable to perform month end tasks.			
d	handers left: 3076				
Update Problem Report Request Approval	al Show Workflow Delete				

2. After the problem record is created, relate all other applicable incidents to the problem record. Reference Appendix A. Sections i. or ii. for instruction on how to relate incident(s) to problems records.

NOTE: After relating the incident(s), the state(s) on the incidents automatically change to Awaiting Problem. Per the UCF IT Incident Management Policy (located at <u>http://it.ucf.edu/policies-and-standards/it-service-management/</u>), if the underlying issue is outside of UCF IT's control to fix, then the incident states should be changed to Awaiting Vendor from Awaiting Problem to stop the incident SLA clock.

				<u> </u>							
Incidents (2)	Approvers	Change Requests									
	ents Edit	Search for text	▼ Search						4	• • 1	to 2 of 2 🕨 🍽 🖻
Prob	olem = PRB0040	29									
🏟 Q	≡ Numi	er 🔳 User	■ Short description	≡ Category	\equiv Priority	≡ State	■ Assignment group	\equiv Assigned to	\equiv Resolved	\equiv Closed	≡ Change Request
	D INC0076	88 Scott Baron	ServiceNow ODBC Driver Issue	Software	3 - Normal	Awaiting Problem	Service Management Solutions Team	Chris Martineau	(empty)	(empty)	
	i) <u>INC0076</u>	87 Scott Baron	ServiceNow ODBC Driver Issue Reported	Software	3 - Normal	Awaiting Problem	Service Management Solutions Team	Chris Martineau	(empty)	(empty)	
Ac	ctions on selected r	ws •								•• •	1 to 2 of 2 🕨 🕨

3. The next step of the Problem Management process is to identify a workaround (if one exists) to restore services to the customer(s) while the root cause of the problem is being investigated.

This scenario will cover identifying a workaround. Section V. of this procedure document covers the scenario of a Problem Owner being unable to identify a workaround using reactive Problem Management.



a. Workaround Identified

The Problem Owner is responsible to document the workaround in the problem record. This will provide the information necessary to resolve the existing incident(s) related to the problem record without relying on a change to be implemented in order to resolve the incident(s).

Within the Workaround section/tab (1.), document the details of the workaround within the Workaround Details field (2.) and click the Save button. After the problem has been saved with a workaround specified, the Workaround checkbox (3.) on the problem record will automatically be checked.

To communicate the workaround to all of the related incidents, select the Communicate Workaround link (4.) within the Related Links section. <u>It is best</u> <u>practice to communicate the workaround when any of the incident assignee(s)</u> <u>are different from the Problem Owner</u>.

(i) Workaround communicated								
Number	PRB0040129		Opened	03/23/2018 04:29:59 PM				
Configuration item	ServiceNow ODBC Driver	• 0	Opened by	Scott Baron	٩	۲	0	
		0	Approval	Not Yet Requested				
Change request			State	Open				
Known error			* Assignment group	Service Management Solutions Team	٩	۲	(1)	
3. Workaround			* Assigned to	Chris Martineau	٩	۲	(1)	
Problem Description Notes Root Cause Ana	ysis Workaround Closure Information							
Workaround Details	This is the Workaround to resolve the ODBC driver issu	h.						
	Characters left 2414							
Update Problem Report Request Appro	oval Show Workflow Delete							
Related Links								
Communicate Workaround								

Following the Communicate Workaround link being selected, the incident assignee(s) will be notified via a ServiceNow email notification that a workaround is now available for use to resolve the incident(s). The incident record(s) are also updated within the Work Notes stating the workaround details.



NOTE: The workaround identified will also be available to the UCF IT Service Desk members (agents) to be able to resolve any related incidents that may be reported after the fact. <u>The UCF IT Service Desk agents are</u>



responsible to relate the incident(s) to the problem record even though they are able to resolve the incident(s) with the provided workaround.

Since the incident(s) have a workaround identified, the incidents are able to proceed to be resolved without a change needing to be implemented and the problem record being closed.

Per the UCF IT Incident Management Policy (located at <u>http://it.ucf.edu/policies-and-standards/it-service-management/</u>), the incident assignee must get confirmation from the customer that their issue is resolved before moving an incident to resolved.

NOTE: The workaround does not resolve the problem; it resolves the <u>incident(s)</u>. For the problem record to be closed, a root cause is required to be determined and a corresponding change to be implemented successfully to prevent incident recurrence.

4. After the workaround is identified, the next step for the Problem Owner is to determine the root cause of the problem.

Within the Root Cause Analysis (RCA) section/tab of the problem record, fill out all required fields that have an asterisk in red. As a reference, the section titles are highlighted blue and defined below.

Problem Description Note: Root Cause Ana	lysis" Workaround Closure Information
* Summary	
	Ounders left: 200
* Chronology of Events	
	Chardens left: 200
* Scope of Impact	
	Characters Mill 2009
Communications	
	Chanders left: 200
★ Root Cause Analysis	
Lessons Learned	Chancim Mit 200
LESSONS LEATING	
* Corrective Action Plan	Characters left: 200
	Characters left: 2500
Update Problem Report Request Appro	val Show Workflow Delete

Summary: Provide the summary of the problem
Chronology of Events: Provide the timeline of the problem
Scope of Impact: Provide summary of impact/affected systems and users
Communications: Optional field. Provide how the problem was communicated
Root Cause Analysis: Provide the root cause of the problem
Lessons Learned: Optional field. Provide the lessons learned
Corrective Action Plan: Provide both short-term and long-term action items



5. After completing the RCA section/tab in its entirety, select Request Approval to send the RCA to the Problem Manager (ServiceNow "Assignment group" Manager) for approval. The UCF IT Problem Management Policy requires the Problem Manager to approve the RCA before the problem record can be raised as a known error. Email notifications will be sent to the Problem Manager and Problem Owner for RCA requests, rejections and approvals.

< Problem PRB0040129		⁄⁄ √	‡ ‡ ∞∞	Follow	• Upd	ate Problem	Repo Request Approval	Show Workflow	Delete	\uparrow
	L Characters left: 2499									
Root Cause Analysis										
	Characters left: 2499									
Lessons Learned										
	Characters left: 2499									
Corrective Action Plan										
	Characters left: 2499									
Update Problem Report Request Approx	Show Workflow Delete									

The Approvers section/tab located on the problem record will indicate there is an Approval Requested. The Approval field in the top section of the problem record will also indicate the Approval has been Requested/Rejected.

			_					
Incidents (2) Approvers (1)	Change Requests		-					
Approvers Go to Sta	te 🔻 Search							
Approval for = PRB0040	129	\mathbf{i}						
🔅 🔍 = State	≡ Approv	er						
i equester	d <u>Scott Baro</u>	n						
Actions on selected rows								
< Problem PRB0040129			@ √ ≣ ∞	Follow 👻	Update Problem Report Request Approval	Show	w Workfl	ow Delete
Number	PRB0040129		\sim	Opened	03/23/2018 04:29:59 PM			
Configuration item	ServiceNow ODBC Driver Q			Opened by	Scott Baron	Q	۲	()
		0		Approval	Requested			
Change request				State	Open			
Known error			*	Assignment group	Service Management Solutions Team	Q	۲	0
Workaround	 Image: A start of the start of			* Assigned to	Chris Martineau	Q	۲	0



After the Problem Manager reviews and approves the RCA, the problem record will be raised as a known error. The State of the problem will change to Known Error and the Known error checkbox (1.) will be selected.

< = Problem PRB0040129		∅ ∿ 昔 ∞∞	Follow 👻 Update Create Normal Change	Create Emergency Change Problem Report	Show Workflow	Delete 🛧 🗸
Number	PRB0040129		Opened	03/23/2018 04:29:59 PM		
Configuration item	ServiceNow ODBC Driver	० ह 0 🔹	Opened by	Scott Baron	۹ 🖲 🛈	
		0	Approval	Approved		
Change request			State	Known Error		
1. Known error			* Assignment group	Service Management Solutions Team	۹ 🖲 🛈	
Workaround			* Assigned to	Chris Martineau	۹	
Problem Description Notes Root Cause Ana	lysis Workaround Closure Information]				
* Short description	ServiceNow ODBC Driver Issue Reported				8	
* Description	Driver error stating unable to connect. Mul	Itiple users impacted. College of Excelle	nce is unable to perform month end tasks.			
	Characters left: 3876					
Update Create Normal Change Create B	mergency Change Problem Report	Show Workflow Delete				

NOTE: If the Problem Manager rejects the RCA, the Problem Owner should make the necessary updates per the Problem Manager's rejection comments and resubmit for approval by selecting Request Approval again.

The known error raised will allow the UCF IT Service Desk agents to be able communicate problem status and the known error to any customer that contacts the UCF IT Service Desk with the same related issue.

6. Next, to fix the underlying issue, a change is justified to be implemented in this scenario.

Notice the problem record now has three buttons that appeared after the RCA was approved by the Problem Manager: Standard Change, Create Normal Change and Create Emergency Change. For this scenario, a Normal change is to be submitted.

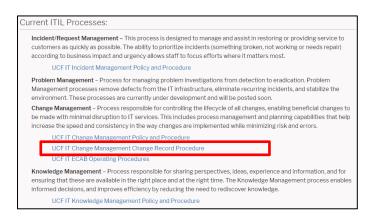
NOTE: If a Standard Change is applicable to prevent the incident from recurring, then skip to step #9.

Click "Create Normal Change"

· · · · · · · · · · · · · · · · · · ·					
< Problem PRB0040205		Follow 👻 Save Update	Standard Change Create Normal Change	Create Emergency Change Problem Report Sho	w Workflow Delete
Number	PRB0040205		Opened	04/17/2018 01:39:29 PM	
Configuration item	ServiceNow ODBC Driver	Q	Opened by	Scott Baron Q,	•
		(j)	Approval	Approved	
Change request			State	Known Error	



- **7.** In its entirety, follow the UCF IT Change Management Change Record Procedure document to submit the related change record.
 - a. http://it.ucf.edu/policies-and-standards/it-service-management/



The problem record will be updated with the change record relationship and the problem record State will change to Pending Change.

< = Problem PRB0040129	1	@ √	ŧ	000	Follow	•	Update	Create Nor	rmal Change	Create Emergency Change	Problem Report	Show	Workflo	Delete
Number	PRB0040129								Opened	03/23/2018 04:29:59 PM				
Configuration item	ServiceNow ODBC Driver Q	÷	0 .	,					Opened by	Scott Baron		Q	۲	0
		1			-				Approval	Approved				
Change request	CHG0030910	۲	()		J			<u>г</u>	State	Pending Change			٦	
Known error	\checkmark							* Assignr	ment group	Service Management Soluti	ons Team	Q	۲	0
Workaround								* /	Assigned to	Chris Martineau		Q	۲	0

Problem Description Notes Root Cause	Analysis Workaround Closure Information	n					
* Short description	ServiceNow ODBC Driver Issue Reporte	d					8
* Description	Driver error stating unable to connect.	Multiple users impacted. College of	Excellence is unable to p	perform month end tasks.			
	Characters left: 3876						
Update Create Normal Change Create	ate Emergency Change Problem Report	Show Workflow Delete					
Related Links							
Communicate Workaround							
Show Workflow							
Incidents (2) Approvers (1 Change Req	uests (1)						
E Change Requests Search for text	Search					44 4	1 to 1 of 1 ► ►► Ξ
Parent = PR80040129							
		≡туре	\equiv Close code	≡ State	Planned start date	Planned end date	■ Assigned to
() <u>CHG0030910</u>	ServiceNow ODBC Driver Issue Reported	Normal		Authorize	03/27/2018 09:30:20 AM	03/28/2018 09:33:50 AM	Chris Martineau
Actions on selected rows						44 4	1 to 1 of 1 🕨 🍽





8. In this scenario, there was a workaround identified, therefore the problem record is <u>NOT</u> dependent on the related incidents to be resolved after the change is implemented (**NOTE:** there are no change records related to the incidents after the change was created). For this particular example, the incidents were resolved well before the related change was implemented when the Problem Owner communicated the workaround to the incident records.

Inciden	ts (2) Aj	oprovers (1) Cha	nge Requests (:	1)								
	Incidents	Edit Searc	h for text	▼ Search							• 1	to 2 of 2 🕨 🍽 🖻
Y	Problem	= PRB0040129										
\$	Q	\equiv Number	≡User	\equiv Short description	\equiv Category	\equiv Priority	≡ State		\equiv Assigned to	\equiv Resolved	\equiv Closed	≡ Change Request
	G	INC0076388	Scott Baron	ServiceNow ODBC Driver Issue	Software	3 - Normal	Resolved	Service Management Solutions Team	Chris Martineau	03/27/2018 10:20:41 AM	(empty)	
	U											

NOTE: The Problem Owner cannot close a problem record until all related incidents are in a resolved/closed state AND the change record is closed with one of the three Close codes.

- Successful
- Successful with issues
- Unsuccessful (with the checkbox selected "Was this change successfully implemented outside of the planned change window?")
- **9.** After the change record is closed with the applicable Close code (Successful, Successful with issues, Unsuccessful with the checkbox selected "Was this change successfully implemented outside of the planned change window?") or a Standard Change was implemented/selected, the problem record state will change to "Change Successful".

If a Standard Change was implemented, a Standard Change section/tab will appear on the problem record that is required to be filled out before the problem record can be closed.

Problem Description Notes Root Cause Anal	rsts Workaround Standard Change" Closure Information
Standard Change	2
* Actual Change Start Date	😰 🔆 Actual Change End Date
* Standard Change Details	
	Ounsetwork Ide 4000
Save Update Problem Report Show	Workflow Close Problem Delete

Due to the fact there are no incidents that have to be confirmed resolved (because of the workaround), the Problem Owner can move forward to close the problem record since the change was implemented successfully and the underlying issue was removed with the change.



10. The Problem Owner is to close out the problem record by navigating to the Closure Information section/tab, select the Close Code of Closed, fill out the Close notes and select the Close Problem button.

< = Problem PRB0040129		<i>●</i> √	‡ ∞	Fo	low	• Update	Create Normal Chang	e Create Emergenc	y Change Problem Report Show Work	N Clos	se Probl	lem	elete 🛧
Number	PR80040129							Opened	03/23/2018 04:29:59 PM				
Configuration item	ServiceNow ODBC Driver		٩.	ā 0	۰			Opened by	Scott Baron	Q	۰	٢	
				Ð				Approval	Approved				
Change request	CHG0030910			۵ (State	Change Successful				
Known error	 	1					*	Assignment group	Service Management Solutions Team	Q,	۲	0	
Workaround	 Image: A start of the start of							⇒ Assigned to	Chris Martineau	٩	۲	0	
Problem Description Notes Root Cause An	alysis Workaround Closure	Information											
Close Code	Closed									•			
Close notes	The Problem has been remov	red.											
	Characters left: 3971												

11. Once the state reflects "Closed", the UCF IT Problem Management process is complete for the reactive Problem Management process w/ a workaroud.

< = Problem PRB0040129			∥ √ ‡ ∞	Follow Update Problem Report	Show Wo	rkflow Delete
Number	PRB0040129		Opened	03/23/2018 04:29:59 PM		
Configuration item	ServiceNow ODBC Driver	Å 0 •	Opened by	Scott Baron	Q, @	١
		0	Approval	Approved		_
Change request	CHG0030910		State	Closed		
Known error	 Image: A start of the start of		* Assignment group	Service Management Solutions Team	Q, (8	0
Workaround	✓		* Assigned to	Chris Martineau	0, 6	0

VI. STEPS TO RECORD PROBLEM RECORD – REACTIVE W/OUT WORKAROUND

This example will walk a Problem Owner through the lifecycle of a problem record using the reactive Problem Management process *without* the Problem Owner being able to identify a workaround.

In this scenario, two incidents have been triaged from the UCF IT Service Desk over to the Service Management Solutions Team for a ServiceNow ODBC issue.

With the trend of incidents, the incident assignee determines there is an underlying issue that needs further investigation. The incident assignee creates a problem record from one of the two incident records to start the Problem Management process.

1. From the incident record, right click on the grey Incident header bar and select Create Problem

							_	Save							
Number	INC0076387					Г		Create Problem	I.	Priority	3 - Normal				
User	Scott Baron	٩	14	۲	d			Create Normal Change	1	Opened	03/23/2018 03:59:29	м			
Preferred Contact Method	Email							Create Emergency Change		Opened by	Scott Baron		Q	4	•
* Email	Scott.Baron@ucf.edu							Metrics Timeline Follow on Live Feed	Ŀ	Contact type	Email				
Location		Q						Show Live Feed Insert		State	Active				
Department	AA-INFO TECHNOLOGIES & RES	Q,	۰	0				Insert and Stay	c Ar	signment group	Service Management	Solutions Team	Q,	4	•
Configuration Item	ServiceNow ODBC Driver	Q,	ñ	0		Ð		Configure 3		Assigned to	Chris Martineau		0,	9	۶T
			٢					Export 2 View 2		Catalog Item					



A problem record will be created off the incident record. The Configuration item (CI), Short description, Description, Assignment group and Assigned to fields from the incident record will be carried over to the newly created problem record.

The Short description and Description fields should be modified to summarize the problem: (Short description ~ one sentence) & (Description - high-level overview).

NOTE: The Problem Owner (Assigned to field) of the problem may be different from the incident assignee(s) and can be adjusted accordingly.

< Problem PRB0040129		<i>₽</i> √ <u>+</u>	Follow • Upo	date Problem Report Request Approval	Show Wor	rkflow	elete
Number	PR80040129	\sim	Opened	03/23/2018 04:29:59 PM			
Configuration Item	ServiceNow ODBC Driver	•	Opened by	Scott Baron	۹. ۵	0	
	٥		Approval	Not Yet Requested			
Change request			State	Open			
			⇒ Assignment grou	Service Management Solutions Team	۹ ۵	0	
Workaround	v		* Assigned to	Chris Martineau	0, @	0	
Problem Description Notes Root Cause Ana	lysis Workaround Closure Information						
>k Short description	ServiceNow ODBC Driver Issue Reported				Ŷ		
>/< Description	Driver error stating unable to connect. Multiple users impacted. Co	college of Excellence is unable to perform month en	id tasks.				
	Characters left: 3876						
Update Problem Report Request Appro	val Show Workflow Delete						

2. After the problem record is created, relate all other applicable incidents to the problem record. Reference Appendix A. Sections i. or ii. for instruction on how to relate incident(s) to problems records.

NOTE: After relating the incident(s), the state(s) on the incidents automatically change to Awaiting Problem. Per the UCF IT Incident Management Policy (located at <u>http://it.ucf.edu/policies-and-standards/it-service-management/</u>), if the underlying issue is outside of UCF IT's control to fix, then the incident states should be changed to Awaiting Vendor from Awaiting Problem to stop the incident SLA clock.

	_							/				
Incident	ts (2) Ap	provers Chang	ge Requests									
	Incidents	Edit Sear	ch for text	▼ Search						•	• • 1	to 2 of 2 🕨 🍽 🖻
P	Problem	= PRB0040129										
\$	Q	\equiv Number	≡ User	≡ Short description	■ Category	■ Priority	🗏 State 🗡	■ Assignment group	\equiv Assigned to	\equiv Resolved	\equiv Closed	≡ Change Request
	(i)	INC0076388	Scott Baron	ServiceNow ODBC Driver Issue	Software	3 - Normal	Awaiting Problem	Service Management Solutions Team	Chris Martineau	(empty)	(empty)	
	i	INC0076387	Scott Baron	ServiceNow ODBC Driver Issue Reported	Software	3 - Normal	Awaiting Problem	Service Management Solutions Team	Chris Martineau	(empty)	(empty)	
	Actions	on selected rows	•								•• •	1 to 2 of 2 🕨 🕨

3. The next step of the Problem Management process is to identify a workaround (if one exists) to restore services to the customer(s) while the root cause of the problem is being investigated.

In this scenario, the Problem Owner is unable to identify a workaround.

4. With no workaround identified, the Problem Owner is to determine the root cause of the problem next.



Within the Root Cause Analysis (RCA) section/tab of the problem record, fill out all required fields that have an asterisk in red. As a reference, the section titles are highlighted blue and defined below.

Problem Description totes Root Cause Anal	holar tookaround Closure information
* Summary	
	Diameters bit 200
* Chronology of Events	
	Dasdan kit. 260
* Scope of Impact	
	Daradim leh 200
Communications	
	Chandra Mc 2009
* Root Cause Analysis	
Lessons Learned	Chandras Milt 2000
* Corrective Action Plan	Ölusstari filt 200
	Candon leit 700
Update Problem Report Request Approv	Show Workflow Delete

Summary: Provide the summary of the problem
Chronology of Events: Provide the timeline of the problem
Scope of Impact: Provide summary of impact/affected systems and users
Communications: Optional field. Provide how the problem was communicated
Root Cause Analysis: Provide the root cause of the problem
Lessons Learned: Optional field. Provide the lessons learned
Corrective Action Plan: Provide both short-term and long-term action items

5. After completing the RCA section/tab in its entirety, select Request Approval to send the RCA to the Problem Manager (ServiceNow "Assignment Group" Manager) for approval. The UCF IT Problem Management Policy requires the Problem Manager to approve the RCA before the problem record can be raised as a known error. Email notifications will be sent to the Problem Manager and Problem Owner for RCA requests, rejections and approvals.

< = Problem PRB0040129		Ø	\checkmark	‡ °	 Follow	•	Update	Problem Repo	Request Approval	Show Workflow	Delete	\uparrow
	L Characters left: 2499											
Root Cause Analysis												
	Characters left: 2499											
Lessons Learned												
	Characters left: 2499											
Corrective Action Plan												
	Characters left: 2499											
Update Problem Report Request Appro	val Show Workflow Delete											



The Approvers section/tab located on the problem record will indicate there is an Approval Requested. The Approval field in the top section of the problem record will also indicate the Approval has been Requested/Rejected.

Incidents 2) Approvers (1) change Requests	
Approvers Go to State	
Approval for = PRB0040129	
(i) • Requested Scott Baron	
Actions on selected rows	
<	🖉 🔨 🛱 👓 Follow 👻 Update Problem Report Request Approval Show Workflow Delete
Number PR80040129	Opened 03/23/2018 04:29:59 PM
Configuration Item ServiceNow ODBC Driver Q, 🖧 🕢 👁	Opened by Scott Baron Q 👁 🛈
٥	Approval Requested
Change request	State Open
Known error	* Assignment group Service Management Solutions Team Q (
Workaround	* Assigned to Chris Martineau Q 🗶 💿

After the Problem Manager reviews and approves the RCA, the problem record will be raised as a known error. The state of the problem will change to Known Error and the Known error checkbox (1.) will be selected.

NOTE: If the Problem Manager rejects the RCA, the Problem Owner should make the necessary updates per the Problem Manager's rejection comments and resubmit for approval by selecting Request Approval again.

The known error raised will allow the UCF IT Service Desk agents to be able communicate problem status and the known error to any customer that contacts the Service Desk with the same related issue.

< Problem PRB0040129		@ ∱ ∄ …	Follow 🔹 Update	Create Normal Change	Create Emergency Change	Problem Report	Show Wo	rkflow	Delete] ↑ ↓
Number	PRB0040129			Opened	03/23/2018 04:29:59 PM					
Configuration item	ServiceNow ODBC Driver	Q _ A _ O (*)		Opened by	Scott Baron		0, @	0		
		0		Approval	Approved					
Change request				State	Known Error					
1. Known error				* Assignment group	Service Management Solution	ons Team	۹ .	0		
Workaround				* Assigned to	Chris Martineau		Q @	0		
Problem Description Notes Root Cause Ar	alysis Workaround Closure Information									
* Short description	ServiceNow ODBC Driver Issue Reported						8			
* Description	Driver error stating unable to connect. Multi	ple users impacted. College of Excelle	ence is unable to perform month er	ıd tasks.						
	Linaracters left: 3876									
Update Create Normal Change Create	Emergency Change Problem Report SI	now Workflow Delete								



6. Next, to fix the underlying issue, a change is justified to be implemented in this scenario.

Notice the problem record now has three buttons that appeared after the RCA was approved by the Problem Manager: Standard Change, Create Normal Change and Create Emergency Change. For this scenario, a Normal change is to be submitted.

NOTE: If a Standard Change is applicable to prevent the incident from recurring, then skip to step #8.

Click "Create N	ormal Change"				
< = Problem PRB0040205		Save Update Standard Change	Create Normal Change	Create Emergency Change	Problem Report Show Workflow Delete
Number	PRB0040205		Opened	04/17/2018 01:39:29 PM	
Configuration item	ServiceNow ODBC Driver		Opened by	Scott Baron	Q, 🗶 🕕
	٢		Approval	Approved	
Change request			State	Known Error	

- **7.** In its entirety, follow the UCF IT Change Management Change Record Procedure document to submit the related change record.
 - a. <u>http://it.ucf.edu/policies-and-standards/it-service-management/</u>

Current ITIL Processes:
Incident/Request Management – This process is designed to manage and assist in restoring or providing service to customers as quickly as possible. The ability to prioritize incidents (something broken, not working or needs repair) according to business impact and urgency allows staff to focus efforts where it matters most.
UCF IT Incident Management Policy and Procedure
Problem Management – Process for managing problem investigations from detection to eradication. Problem Management processes remove defects from the IT infrastructure, eliminate recurring incidents, and stabilize the environment. These processes are currently under development and will be posted soon.
Change Management – Process responsible for controlling the lifecycle of all changes, enabling beneficial changes to be made with minimal disruption to IT services. This includes process management and planning capabilities that hel increase the speed and consistency in the way changes are implemented while minimizing risk and errors.
UCF IT Change Management Policy and Procedure UCF IT Change Management Change Record Procedure UCF IT ECAB Operating Procedures
Knowledge Management – Process responsible for sharing perspectives, ideas, experience and information, and for ensuring that these are available in the right place and at the right time. The Knowledge Management process enable informed decisions, and improves efficiency by reducing the need to rediscover knowledge.
UCF IT Knowledge Management Policy and Procedure

The problem record will be updated with the change record relationship and the problem record State will change to Pending Change.



Related Links

=

≡ Number

Actions on selected rows... •

(i) <u>CHG0030910</u>

Short description

ServiceNow ODBC Driver Issue Reported

University of Central Florida Information Technology (UCF IT)

1 to 1 of 1 🕨 🍽

Assigned to

OAM <u>Chris Martineau</u>

Planned end date

03/28/2018 09:33:50 AM

< Problem PRB0040129			∥ √ ∄ …	Follow 👻 Update	Create Normal Change	Create Emergency Change	Problem Report	Show Wo	orkflow	Delete
	Number	PRB0040129			Opened	03/23/2018 04:29:59 PM				
Config	guration item	ServiceNow ODBC Driver	Q & Ø		Opened by	Scott Baron		Q, (4	•	
_			()	-	Approval	Approved				
Ch	nange request	CHG0030910	۰ (J	State	Pending Change				
	Known error	 Image: A start of the start of			* Assignment group	Service Management Solution	ons Team	٩ ٩	•	
	Workaround				\ast Assigned to	Chris Martineau		0,	•	
Problem Description Notes	Root Cause Analy	sis Workaround Closure Information								
* Short	t description	ServiceNow ODBC Driver Issue Reported						8		
*	Description	Driver error stating unable to connect. Multiple users i	mpacted. College of Excellenc	e is unable to perform month end	tasks.					
		haracters left: 3876								

NOTE: Due to there not being a workaround identified, when the change record is created off the problem record, the related incidents will be brought over to the change record as Incidents Pending Change. In the scenario where the workaround was identified above, the correlating change record did not have any Incidents Pending Change because the related incidents could be resolved without depending on the change to be implemented.

≡ Close code

≡ State

Authorize

E Planned start date

03/27/2018 09:30:20 AM

≡ Туре

Normal

Affected	d CIs (1)	Impacted Services/CIs	Approvers (8	3) Change Tasks	Incidents Pending Change (2)	Incidents Caused E	By Change	Resource Plans	Problems (1
	Incidents	Pending Change New	W Search	for text	Search				
Ţ	Change	Request = CHG0030912							
袋	Q	■ Number	≡ User	≡ Short descrip	ion	■ Category	\equiv Priority	≡ State	
	i	INC0076388	Scott Baron	ServiceNow ODB	C Driver Issue	Software	3 - Normal	Awaiting	Problem
	i	INC0076387	Scott Baron	ServiceNow ODB	C Driver Issue Reported	Software	3 - Normal	Awaiting	Problem

8. After the change record is closed with the applicable Close code (Successful, Successful with issues, Unsuccessful with the checkbox selected "Was this change successfully implemented outside of the planned change window?") or a Standard Change was implemented/selected, the problem record state will change to Change Successful. The related incidents on the problem record will be automatically updated to a state of Awaiting User Confirmation.





If a Standard Change was implemented, a Standard Change section/tab will appear on the problem record that is required to be filled out before the problem record can be closed.

Problem Description Notes Root Cause Analy	ysis Workaround Standard Change*	Closure Information		
Standard Change	 Image: A start of the start of			
* Actual Change Start Date		<u>2</u> 9	* Actual Change End Date	(P)
* Standard Change Details				
	Characters left: 4000			
Save Update Problem Report Show	Workflow Close Problem Delete			

In this scenario, a workaround could not be identified, therefore to close the problem record; the related incidents **must** be verified resolved following the change being implemented.

NOTE: The Problem Owner cannot close a problem record until all related incidents are in a resolved/closed state AND the change record was closed with one of the three Close codes.

- Successful
- Successful with issues
- Unsuccessful (with the checkbox selected "Was this change successfully implemented outside of the planned change window?")
- **9.** After the incidents are confirmed by the customer(s) that their issue is resolved (and the incident states are changed to Resolved), the Problem Owner is to close out the problem record by navigating to the Closure Information section/tab, select the Close Code of Closed, fill out the Close notes and select the Close Problem button.

< Problem PRB0040129	@ ~ :	• ooo Follow	• Update	Create Normal Change	Create Emergency (Change Problem Report Show Workflo	v Clo	ose Prot	olem	elete 🛧 -
Number	PRB0040129				Opened	03/23/2018 04:29:59 PM				
Configuration item	ServiceNow ODEC Driver	Q A 0 6	>		Opened by	Scott Baron	Q	۲	0	
		١			Approval	Approved				
Change request	CHG0030910	۵ (State	Change Successful				
Known error				* Assig	gnment group	Service Management Solutions Team	Q	۲	(
Workaround				*	< Assigned to	Chris Martineau	Q	۲	0	
Problem Description Notes Root Cause And	alysis Workaround Closure Information									
Close Code	Closed						Ŧ			
Close notes	The Problem has been removed.						_			

10. Once the state reflects "Closed", the UCF IT Problem Management process is complete for the reactive Problem Management process w/out a workaroud.



< Problem PRB0040129			∅ ∿ 昔 ∞	Follow Update Problem Report	Show	Work	low Dele
Number	PRB0040129		Opened	03/23/2018 04:29:59 PM			
Configuration item	ServiceNow ODBC Driver Q	å 0 🔹	Opened by	Scott Baron	Q,	۲	0
		٢	Approval	Approved			
Change request	CHG0030910		State	Closed			
Known error	✓		* Assignment group	Service Management Solutions Team	Q	۲	(i)
Workaround			* Assigned to	Chris Martineau	Q	۲	()

VII. STEPS TO RECORD PROBLEM RECORD – PROACTIVE

Identifying problems based on periodic scheduled reviews and analyses of closed incident patterns is referred to as proactive Problem Management. A problem record can be created as a standalone record with or without relating incident records.

It is up to the discretion of each UCF IT department to create a problem record proactively.

NOTE: With proactive Problem Management, a problem record will <u>ALWAYS</u> be created from scratch as a new problem record. Related incident(s) to the problem record will always be in a closed state in ServiceNow. Refer to the Appendix (Section B.) for instruction on how to relate inactive (closed) incident(s) to a problem record.

There is one way to create a proactive problem record:

1. Type "Problem" in the navigator/application menu search bar within ServiceNow and select Create New

G UCF	Welcome to You	ır IT Service Manaş
Problem		\otimes
	*	\odot
Problem		
Create New]	

- 2. The newly created problem record will require an Assignment group, a Problem Owner (Assigned to), Short description (~ one sentence) & Description (high-level overview). The Configuration item is optional.
- **3.** Submit the problem record by selecting the Submit button.

✓ ≡ ^{Problem} _{Newrecord}	1	Submit	Problem Report Show Workflow
---	---	--------	------------------------------





4. After the proactive problem record is created, follow the same steps of Section VI. or Section V. starting with Step 2. <u>Relating the incident(s) will be based off the direction of Section B. of the Appendix.</u>

VIII. STEPS TO RECORD PROBLEM RECORD – RETRO

There may be occasions when the UCF IT Problem Management process cannot be followed in its entirety/order due to Emergency changes that must to be introduced as soon as possible to restore services. If an Emergency change is not implemented as soon as possible, the identified issue could create significant risk to the university.

If for any reason an Emergency change is implemented without a related ServiceNow incident record, then the accountable UCF IT department is STILL REQUIRED to create a problem record after IT services are restored. This is known as a retro problem record.

The retro problem record will ensure a root cause analysis (RCA) is completed for historical reference, management review and communication (that may be required). The Problem Owner is responsible to relate the problem record to the Emergency change record.

There is one way to create a retro problem record:

1. Type "Problem" in the navigator/application menu search bar within ServiceNow and select Create New

G UCF	Welcome to You	ur IT Service Mana
Problem		\otimes
	*	٩
Problem		
Create New]	

- **2.** The newly created problem record will require an Assignment group, a Problem Owner (Assigned to), Short description (~ one sentence) & Description (high-level overview). The Configuration item is optional.
- **3.** Submit the problem record by selecting the Submit button.
- **4.** Next, because this is a retro problem record, identifying a workaround or relating incidents to the problem record is not applicable. However, as indicated above "<u>The</u>



Problem Owner is responsible to relate the problem record to the Emergency change record."

Within the Root Cause Analysis (RCA) section/tab of the problem record, fill out all required fields that have an asterisk in red. As a reference, the section titles are highlighted blue and defined below.

Problem Description Potes Root Cause An	alysis* forkaround Closure Information
* Summary	
	Chanacters Inft 2509
* Chronology of Events	
	Janaders ME 200
* Scope of Impact	
	Guaraters left 200
Communications	
	Characters Mit 2000
★ Root Cause Analysis	
	Chaucters left: 2509
Lessons Learned	
	Consistent kille 2000
* Corrective Action Plan	
	Gausters left 250
Update Problem Report Request Appre	Show Workflow Delete

Summary: Provide the summary of the problem
Chronology of Events: Provide the timeline of the problem
Scope of Impact: Provide summary of impact/affected systems and users
Communications: Optional field. Provide how the problem was communicated
Root Cause Analysis: Provide the root cause of the problem
Lessons Learned: Optional field. Provide the lessons learned
Corrective Action Plan: Provide both short-term and long-term action items

5. After completing the RCA section/tab in its entirety, select Request Approval to send the RCA to the Problem Manager (ServiceNow "Assignment group" Manager) for approval. The UCF IT Problem Management Policy requires the Problem Manager to approve the RCA before the problem record can be raised as a known error. Email notifications will be sent to the Problem Manager and Problem Owner for RCA requests, rejections and approvals.

< Problem PRB0040129		Ø	\checkmark	‡‡ °°	o F	Follow 👻	Update	Problem Repo	Request Approval	Show Workflow	Delete	\uparrow
	L Characters left: 2499											
Root Cause Analysis												
Lessons Learned	Characters left: 2499											
	Characters left: 2499											
Corrective Action Plan												
	Characters left: 2499											
Update Problem Report Request Appro	val show Workflow Delete											



The Approvers section/tab located on the problem record will indicate there is an Approval Requested. The Approval field in the top section of the problem record will also indicate the Approval has been Requested/Rejected.

Incidents (2) Approvers (1) Chang	ge Requests					
Approvers Go to State	▼ Search					
Approval for = PRB0040129		\mathbf{n}				
	■ Approver					
(j) • <u>Requested</u>	Scott Baron					
Actions on selected rows V						
< = Problem PRB0040129				Update Problem Report Request Approval	Show Wo	rkflow Delete
Number PRB0	040129		Opened	03/23/2018 04:29:59 PM		
Configuration item Service	ceNow ODBC Driver Q	A O (*)	Opened by	Scott Baron	Q @) (i)
		0	Approval	Requested		
Change request			State	Open		
Known error			* Assignment group	Service Management Solutions Team	Q @	•
Workaround			* Assigned to	Chris Martineau	Q. (8)	• •

After the Problem Manager reviews and approves the RCA, the problem record will be raised as a known error. The state of the problem will change to known error and the Known error checkbox will be selected.

NOTE: If the Problem Manager rejects the RCA, the Problem Owner should make the necessary updates per the Problem Manager's rejection comments and resubmit for approval by selecting Request Approval again.

< = Problem PRB0040129	∥ ∿ ‡ ∞	Follow Update Create Normal Change	Create Emergency Change Problem Report	Show Workflow Delete 1
Number PRB0040129		Opened	03/23/2018 04:29:59 PM	
Configuration item ServiceNow ODBC Driver	<u>्</u> र्ह् 0 ७	Opened by	Scott Baron	Q 🗶
	0	Approval	Approved	
Change request		State	Known Error	
Known error		* Assignment group	Service Management Solutions Team	Q @ ()
Workaround		* Assigned to	Chris Martineau	Q. 🖲 🕕
Problem Description Notes Root Cause Analysis Workaround Closure Information				
* Short description ServiceNow ODBC Driver Issue Reported				8
* Description Driver error stating unable to connect. Mu	Itiple users impacted. College of Excell	ence is unable to perform month end tasks.		
Characters left: 3876				
Update Create Normal Change Create Emergency Change Problem Report	Show Workflow Delete			

6. Following the Problem Manager approving the RCA, the Emergency change record is required to be related to the retro problem record



Go to the Change Requests section/tab of the problem record and click Edit

Related Li	Related Links									
Communicate Workaround Show Workflow										
SHOW WORKIN	ow									
Incidents	Approvers (1) Change	Requests							
E Cha	ange Requests	Edit	Search	for text	•					
Pa	arent = PRB004	0196								
 4 4	Q =	■ Number		≡ Short o	description					

7. Find (highlight) the associated Emergency change record, select the right arrow and then select Save

- choose field	▼ - oper	▼ value	
llection		Change Requests List	
2		PRB0040196	
		CHG0030958	
CHG0030953		CHG0030958	
CHG0030954 CHG0030955			
CHG0030956			
	>	1	
	<		
	Car	ce Save	

8. After relating, the change record will show in the Change Requests section/tab and the State of the problem record will change to "Change Successful"

< Problem PRB0040196			∥ √ ≟ …	Follow • Save	Update Problem Repr	ort Norkflow C	lose Problem Delete
Number	PRB0040196			Opened	04/16/2018 03:40:37 PM		
Configuration Item	ServiceNow Q	5 0 0		Opened by	Scott Baron	0	
		D		Approver	Approved		_
Change request		•		State	Change Successful		
Known error				* Assignment group	Service Desk	٩	
Workaround				* Assigned to	Ruben Lopez	٥	
Problem Description Notes Root Cause Ana	alysis Workaround Closure Information						
* Short description	Retro Problem Record	/					Q
* Description	Retro Problem Record	/					
	Characters left: 2002						
	w Workflow Close Problem Delete						
Related Links Communicate Workaround							
Show Workflow							
Incidents Approvers (1 Change Requests ()	0						
Edit Search	for text v Search					44 4	1 to 1 of 1 🕨 🍽 🖃
Parent = PRB0040196							
Q ≡ Number ≡ :	Short description	≡туре	\equiv Close code	≡ State ≡ Plane	ned start date	Planned end date	\equiv Assigned to
() <u>CHG0030958</u> Eme	ergency Change: Retro Emergency Change	Emergency	Successful	Closed 04/16/20	18 03:06:20 PM	04/16/2018 03:06:21 PM	Felicia Kendall



9. Lastly, the Problem Owner is to close out the problem record by navigating to the Closure Information section/tab, select the Close Code of Closed, fill out the Close notes and select the Close Problem button.

< Problem PRB0040129	🖋 🔨 芸 🚥 Follow 🔹 Update Create Normal Change Create Emergen	ncy Change Problem Report Show Workflor C	lose Problem elete
Number PR80040129 Configuration Item ServiceNow ODBC Driver	Opened Opened by	03/23/2018 04:29:59 PM Q	
Change request CHG0030910	Approval Approval State	Approved Change Successful	
Known error 🗸	* Assignment group * Assigned to		
Problem Description Notes Root Cause Analysis Workaround Closure Close Code Closed Close notes The Problem has been remov	ed.		

IX. APPENDIX

A. RELATING ACTIVE (OPENED) INCIDENTS TO PROBLEM RECORDS

There are two recommended ways to relate active (opened) incidents to a problem record.

i. From the Problem Record

To relate applicable incident(s) to the problem record. Go to the Incidents section/tab



Click on Edit

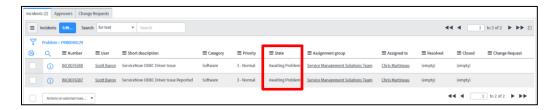
Search on the incident number(s) you are relating and then select the right arrow to bring them over to the Incidents List



Collection			Incidents List	
Q			PRB0040129	
INC0076351 INC0076352 INC0076353 INC0076354 INC0076355 INC0076360 INC0076361 INC0076361 INC0076363 INC0076363 INC0076363 INC0076376 INC0076381 INC0076384 INC0076384 INC0076385		< <	INC0076387 INC0076388	
		Cancel	Save	
Number	INC0076388			
Assigned to	Chris Martineau			
Priority	3 - Normal			
Assignment group	Service Management Solution	ns Team		
Short description	ServiceNow ODBC Driver Issue	e		

Click Save and the record will be added to the Incidents section/tab. To remove incidents from the relationship, just click the Edit button and select the left arrow from the incidents List.

NOTE: If an incident is removed from the problem relationship, the state of the incident will remain "Awaiting Problem". It is up to the incident assignee to update the state accordingly.



ii. From the Incident Record – OneSearch

When an incident assignee opens up an incident record, they will see the OneSearch section that reflects all relevant knowledge articles, open problems, open incidents, service catalog suggestions, etc.

The Open Problems section reflects all relevant open problems for the incident assignee to review. If there is an incident that should be related to an open problem, the incident assignee can select the Link icon.



Kn	nowledge Articles 50	Open Problems 1	Open Incidents	Service Catalog (8)	Changes Last 7 Days 🚺	Changes in progress 2
S Link PRB0040129 - ServiceNow ODBC Driver Iss	ssue Reported					
Visit th Link Problem to Incident						

Once selecting the Link icon, the incident record will prompt to save the record to finalize. The incident assignee can either right click on the grey header bar and select Save, select the Update button or select the Save button

< ≡ Incident INCOOTG388	Save	P 🔨 👬 000 Follow 🔹 Update Cancel I
"Problem" field updated - Save record to finalize.	Ado to visual rask Board Create Problem	
Number INC0076388	Create Request Create Normal Change	Priority 3 - Normal
User Scott Baron	Create Emergency Change Metrics Timeline	Opened 03/23/2018 04:02:43 PM

B. RELATING INACTIVE (CLOSED) INCIDENTS TO PROBLEM RECORDS

There is one recommended way to relate inactive (closed) incident(s) to a problem record.

i. From the Problem Record

To relate applicable incidents to the problem record. Go to the Incidents section/tab

Incider	ts (1) Ap	pprovers Change	e Requests									
≡	Incidents	Edit Searc	h for text	▼ Search						4	• • 1	to 1 of 1 🕨 🍽 🖻
7	Problem	= PR50140129										
-	Q	≡ Number	≡User	\equiv Short description	■ Category	\equiv Priority	E State	≡ Assignment group	Assigned to	\equiv Resolved	\equiv Closed	
	i	INC0076387	Scott Baron	ServiceNow ODBC Driver Issue Reported	Software	3 - Normal	Awaiting Problem	Service Management Solutions Team	Chris Martineau	(empty)	(empty)	
	Actions	on selected rows	ł								(4 4	1 tolof1 🕨 🕨

Click on Edit

The default filter needs to be modified to return inactive (closed) incidents.

Select the "X" (Delete) from the State condition row to remove the condition.

Add Filter Run filter	K		
Active	▼ is	▼ true	▼ AND OR X
State	▼ is not one of	Canceled New	
		Active Awaiting Problem	Delete

Then modify Active is true to Active is false and select Run Filter.



A	dd Filter 🕅					
	Active 🔻	is	•	true 🔻]	AND OR X
Collection			Incid	Q.		
Q		PRBO				
				false		

Search on the incident number(s) you are relating and then select the right arrow to bring them over to the Incident List

Collection			Incidents List	
Q			PRB0040129	
INC0076351 INC0076352 INC0076353 INC0076354 INC0076355 INC0076356 INC0076360 INC0076361 INC0076362 INC0076363 INC0076369 INC0076370	Ŷ	> <	INC0076387 INC0076388	*
INC0076376 INC0076381 INC0076384 INC0076385	T			•
		Cancel	Save	
Number	INC0076388			
Assigned to	Chris Martineau			
Priority	3 - Normal			
Assignment group Service Management Solutions Team				
Short description	ServiceNow ODBC Driver Issue	e		

Click Save and the record will be added to the Incidents section/tab. To remove incidents from the relationship, just click the Edit button and select the left arrow from the Incidents List.

C. DEFERRING A PROBLEM RECORD (HOW TO)

A problem record can be deferred ONLY if the Problem Owner deems there is no root cause and workaround determination (e.g. costs are too high to diagnose, value to remove is too low, etc.)". Once a problem record is raised as a known error or a workaround is identified, the Problem Owner is no longer able to defer the problem record. The Deferral button will be removed as an option on the form.



To defer a problem record, click the Deferral button and then input the Close notes (reason why the problem is being deferred).

< = Problem PRB0040132				Jpdate Defferal Problem Report Reques	t Approval Show Workflow Delete
Number	PRB0040132		Opened	03/28/2018 01:38:48 PM	
Configuration item	ServiceNow Q,	A 0 *	Opened by	Scott Baron	9
		0	Approval	Not Yet Requested	
Change request			State	Open	
Known error			* Assignment group	Service Management Solutions Team	9 9 0
Workaround			>/< Assigned to	Chris Martineau	Q 🗶
Problem Description Notes Root Cau	ise Analysis Workaround Closure Information*	1			

* Close Code	Deferred	•
* Close notes		
	Characters feit 4000	

Following the problem deferral, a ServiceNow email notification will be sent out to the related incident assignees notifying them that there is no longer a related problem to the incident.

Attention incident assignee. Problem record PRB0 was deferred without root cause and workaround determination. You are receiving this notification because you are the incident assignee of an incident that was related to this problem record. Please continue to manage this incident using the UCF IT Incident Management Policy and Procedure.	
Thank you.	

D. GENERATING (RUNNING) A PROBLEM REPORT

A problem report is an executive summary report often used when departments inside or outside UCF IT are requesting a summary report of the problem.

This report can be generated at any time during the life of the problem record.

To generate a "Problem Report", click on the Problem Report button located on the problem record.

By clicking this button, ServiceNow generates a PDF, which is downloaded to the clients browsers default location.