

Title: UCF IT Problem Management – Problem Record Procedure	Effective: 05/11/2018
	Revised: 08/12/2019
Approved By: Michael Sink, Associate VP & COO, UCF IT	Page 1 of 36

Revision History			
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
Sections V. & VI.	03/18/2019	Scott Baron	Awaiting Vendor Checkbox & Vendor Change button
Section III.	03/18/2019	Scott Baron	Revised UCF IT members
Section IX. Appendix E.	08/12/2019	Scott Baron	Added how to cancel a problem record
Section IX. Appendix F.	08/12/2019	Scott Baron	Added how to update self-service portal from record

I.	DOCUMENT CONTROL AND APPROVALS	2
II.	OBJECTIVES	2
III.	DEFINITIONS.....	2
IV.	SCOPE OF PROBLEM RECORD PROCEDURE DOCUMENT	4
V.	STEPS TO RECORD PROBLEM RECORD – REACTIVE W/ WORKAROUND	4
VI.	STEPS TO RECORD PROBLEM RECORD – REACTIVE W/OUT WORKAROUND	13
VII.	STEPS TO RECORD PROBLEM RECORD – PROACTIVE.....	20
VIII.	STEPS TO RECORD PROBLEM RECORD – RETRO	21
IX.	APPENDIX.....	27
A.	RELATING ACTIVE (OPENED) INCIDENTS TO PROBLEM RECORDS.....	27
i.	From the Problem Record.....	27
ii.	From the Incident Record – OneSearch.....	28
B.	RELATING INACTIVE (CLOSED) INCIDENTS TO PROBLEM RECORDS.....	29
i.	From the Problem Record.....	29
C.	DEFERRING A PROBLEM RECORD (HOW TO)	30
D.	GENERATING (RUNNING) A PROBLEM REPORT.....	31
E.	CANCELING A PROBLEM RECORD	31
F.	SELF-SERVICE PORTAL (SSP) COMMUNICATION - ALERT/UPDATE	32
i.	Initial Post Instruction:.....	32
ii.	Updating Service Alert Post from the Problem Record:.....	36

I. DOCUMENT CONTROL AND APPROVALS

This document is authored, managed and governed by UCF IT Strategy and Planning. Final published versions have been approved by the UCF IT AVP & COO and ITSM Governance Committee members. No other parties have the authority to modify or distribute a modified copy of this document. For any questions related to the content of this document, please contact the UCF IT Performance and Service Management department.

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 STILL REQUIRED 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. A temporary workaround/permanent fix may or may not exist

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 March 2019): College of Arts and Humanities, College of Business Administration, College of Community Innovation and Education, College of Health Professions and Sciences, College of Sciences, Computer Services and Telecommunications, Student Development and Enrollment Services, Digital Learning, College of Undergraduate Studies, Office of Instructional Resources, UCF Connect, University Libraries, Human Resources, UCF Foundation, Student Health Services

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:

- Open – Problem record created. Workaround may or may not be identified
- Known Error – Root cause determined and problem record raised as a known error
- Pending Change – When the related change record (Normal or Emergency) is created off of the problem record to permanently fix the underlying issue

- Change Successful – The related change record to the problem record was implemented successfully
- Closed – 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
- Canceled – At any point, the Problem Owner can cancel the problem record (Reference Appendix E. on how to cancel a 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

OneSearch example image that resides on the New Call and Incident Forms

Knowledge Articles 0	Open Problems 0	Open Incidents 0	Service Catalog 0	Changes Last 7 Days 7	Changes in progress 2
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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.

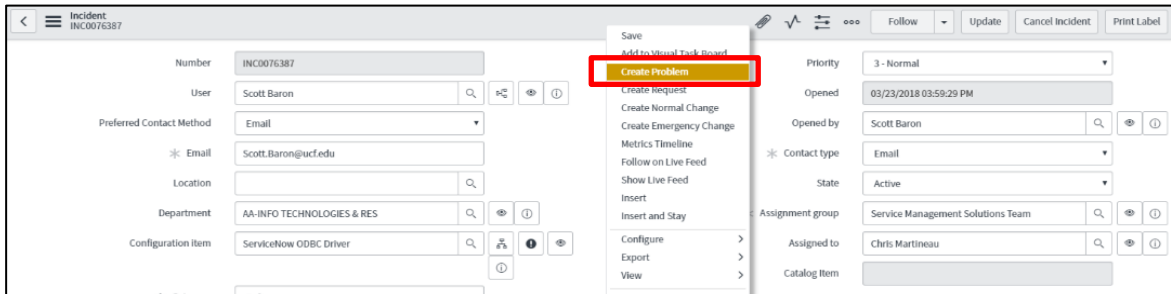
V. STEPS TO RECORD PROBLEM RECORD – REACTIVE W/ WORKAROUND

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

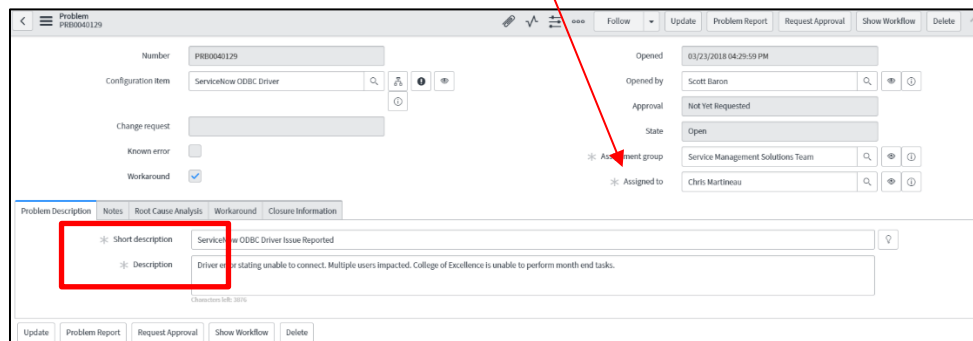


The screenshot shows the 'Incident' record for INC0076387. A right-click context menu is open over the incident header bar, with the 'Create Problem' option highlighted in yellow. The menu also includes options like 'Save', 'Add to My Work Item Board', 'Create Request', 'Create Normal Change', 'Create Emergency Change', 'Metrics Timeline', 'Follow on Live Feed', 'Show Live Feed', 'Insert and Stay', 'Configure', 'Export', and 'View'. The incident details on the left include Number (INC0076387), User (Scott Baron), Preferred Contact Method (Email), Email (Scott.Baron@ucf.edu), Location, Department (AA-INFO TECHNOLOGIES & RES), and Configuration Item (ServiceNow ODBC Driver). The right sidebar shows fields for Priority (3 - Normal), Opened (03/23/2018 03:59:29 PM), Opened by (Scott Baron), Contact type (Email), State (Active), Assignment group (Service Management Solutions Team), and Assigned to (Chris Martineau).

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.



The screenshot shows the 'Problem' record for PRB0040129. The 'Short description' field is highlighted with a red box and contains the text 'ServiceNow ODBC Driver Issue Reported'. The 'Description' field is also highlighted with a red box and contains the text 'Driver error stating unable to connect. Multiple users impacted. College of Excellence is unable to perform month end tasks.' The problem details on the left include Number (PRB0040129), Configuration Item (ServiceNow ODBC Driver), Change request, Known error (unchecked), and Workaround (checked). The right sidebar shows fields for Opened (03/23/2018 04:29:59 PM), Opened by (Scott Baron), Approval (Not Yet Requested), State (Open), Assignment group (Service Management Solutions Team), and Assigned to (Chris Martineau). A red arrow points from the 'Assigned to' field in the incident record screenshot to the 'Assigned to' field in this problem record screenshot.

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

Incidents (2)

Approvers

Change Requests

Incidents

Edit...

Search for text

Search

1

to 2 of

2

◀◀

▶▶

Problem = PR80040129

	Number	User	Short description	Category	Priority	State	Assignment group	Assigned to	Resolved	Closed	Change Request
<input type="checkbox"/>	INC0075388	Scott Baron	ServiceNow ODBC Driver Issue	Software	3 - Normal	Awaiting Problem	Service Management Solutions Team	Chris Martineau	(empty)	(empty)	
<input type="checkbox"/>	INC0075387	Scott Baron	ServiceNow ODBC Driver Issue Reported	Software	3 - Normal	Awaiting Problem	Service Management Solutions Team	Chris Martineau	(empty)	(empty)	

Actions on selected rows...

◀◀

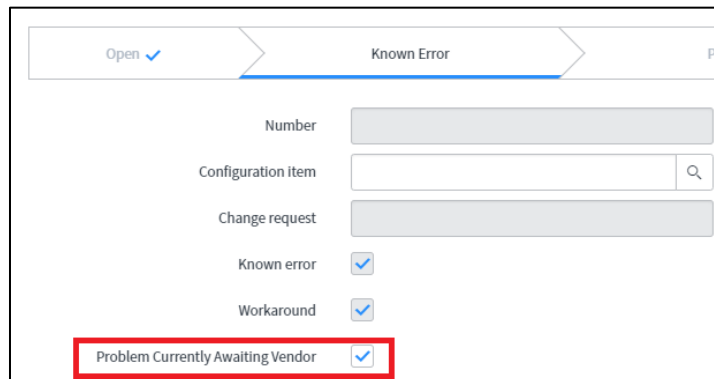
▶▶

1

to 2 of

2

The Problem Owner can select the “Problem Currently Awaiting Vendor” checkbox which will change ALL related incident(s) to the Awaiting Vendor state.



Open ✓

Known Error

Pe

Number

Configuration item

Change request

Known error

Workaround

Problem Currently Awaiting Vendor

- 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 VI. of this procedure document covers the scenario of a Problem Owner being unable to identify a workaround using reactive Problem Management.

a. Workaround Identified

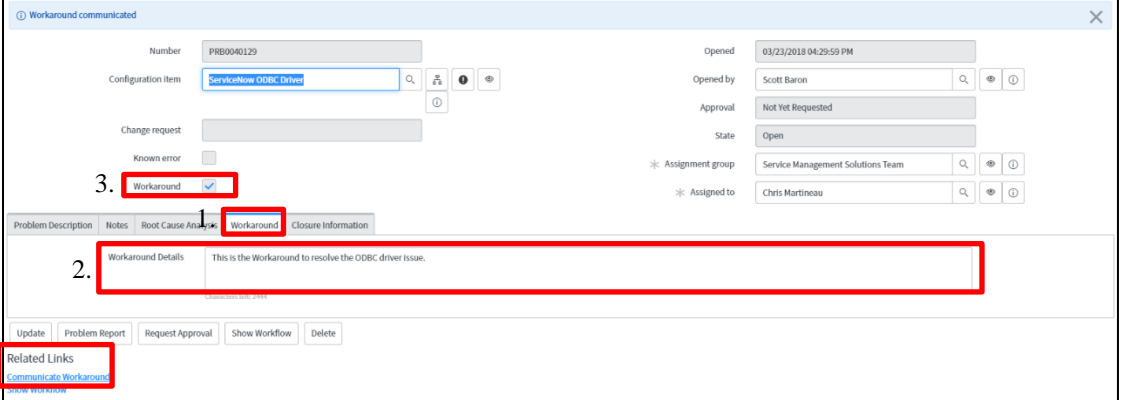
The Problem Owner is responsible to document the workaround in the problem record. This will provide the information necessary to resolve the existing incident(s) related to the problem record without relying on a change to be successfully implemented in order to resolve the incident(s).

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.

It is best practice to communicate the workaround when any of the incident assignee(s) are different from the Problem Owner.



Workaround communicated

Number: PRB0040129

Configuration Item: ServiceNow ODBC Driver

Change request:

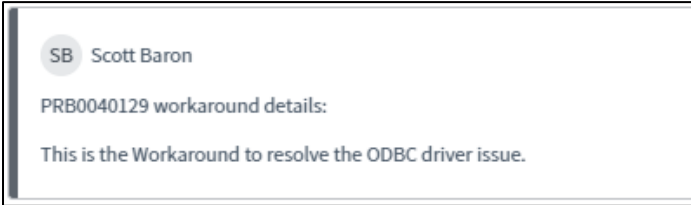
Known error:

3. Workaround: ☒

Workaround Details: 2. This is the Workaround to resolve the ODBC driver issue.

4. 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.



SB Scott Baron

PRB0040129 workaround details:

This is the Workaround to resolve the ODBC driver issue.

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. The UCF IT Service Desk agents are responsible to relate the incident(s) to the problem record even though they are able to resolve the incident(s) with the provided workaround.

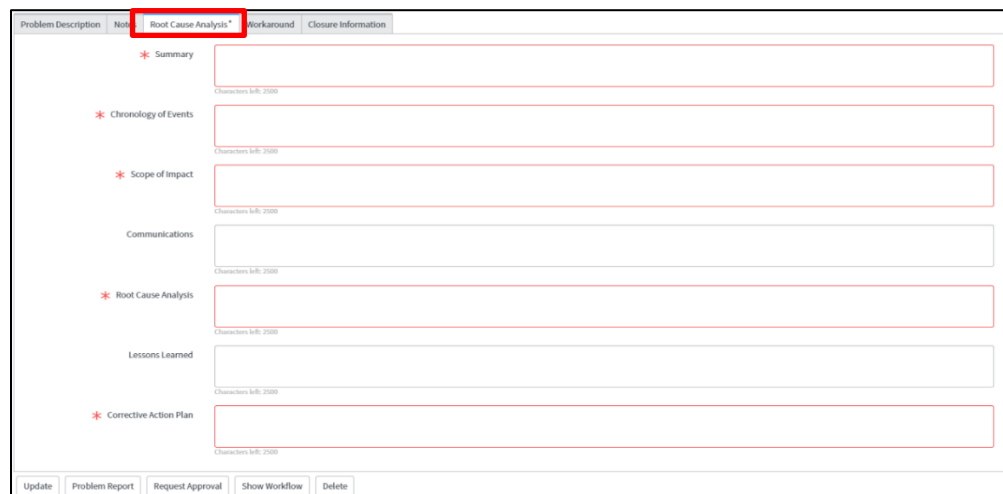
Since the incident(s) have a workaround identified, the incidents are able to proceed to be resolved without a change needing to be implemented and the problem record being closed.

Per the UCF IT Incident Management Policy (located at <http://it.ucf.edu/policies-and-standards/it-service-management/>), 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 incident(s). 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.



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

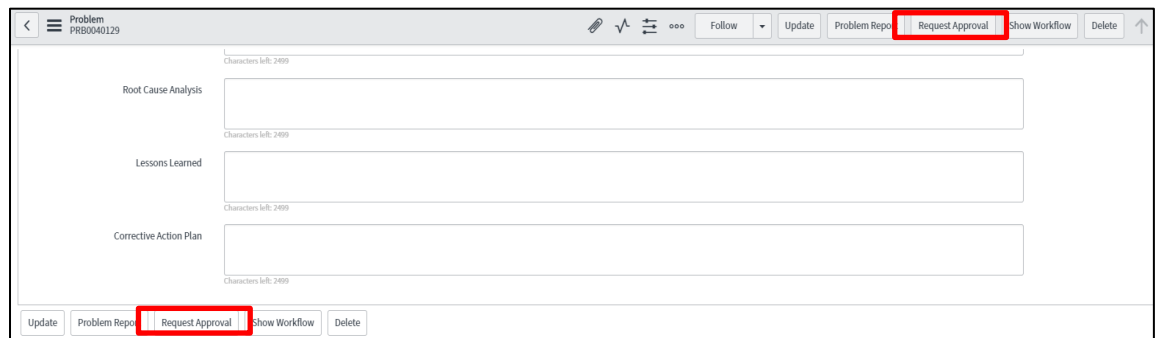
Communications: Optional field. Provide how the problem was communicated

Root Cause Analysis: Provide the root cause of the problem

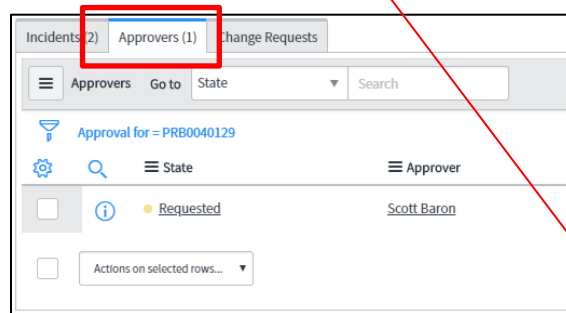
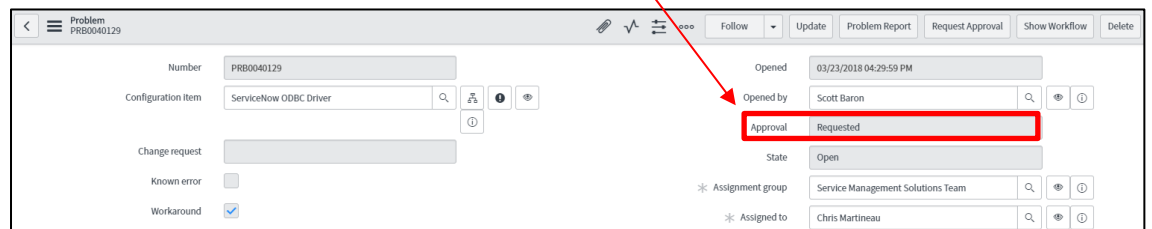
Lessons Learned: Optional field. Provide the lessons learned

Corrective Action Plan: Provide both short-term and long-term action items

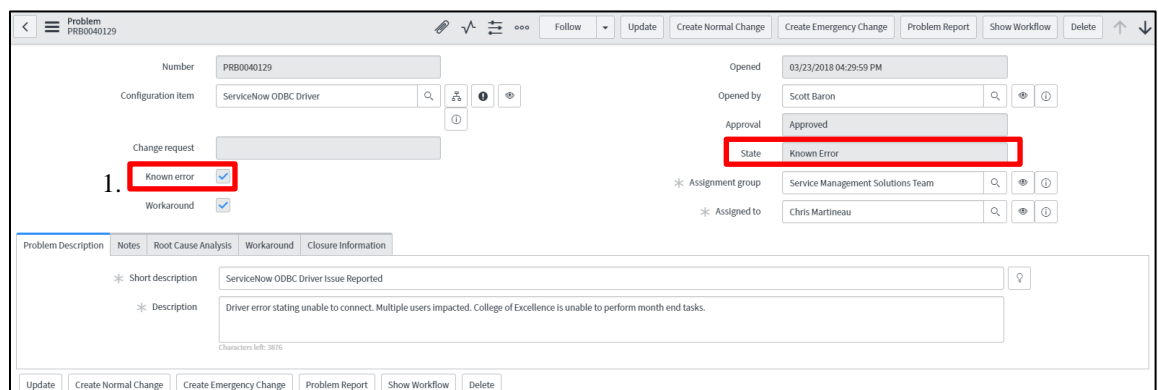
5. After completing the RCA section/tab in its entirety, select Request Approval to send the RCA to the Problem Manager (ServiceNow "Assignment group" Manager) for approval. The UCF IT Problem Management Policy requires the Problem Manager to approve the RCA before the problem record can be raised as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



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.

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.

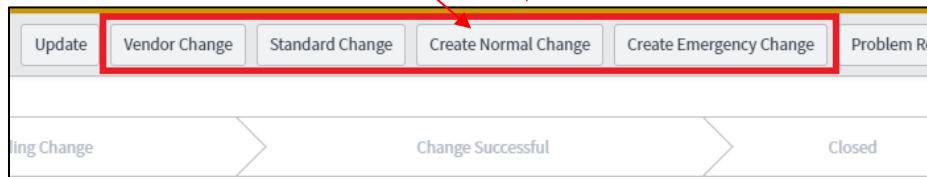
The known error raised will allow the UCF IT Service Desk agents to be able communicate problem status and the known error to any customer that contacts the UCF IT Service Desk with the same related issue.

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

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

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

Click "Create Normal Change"



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/>

Current ITIL Processes:

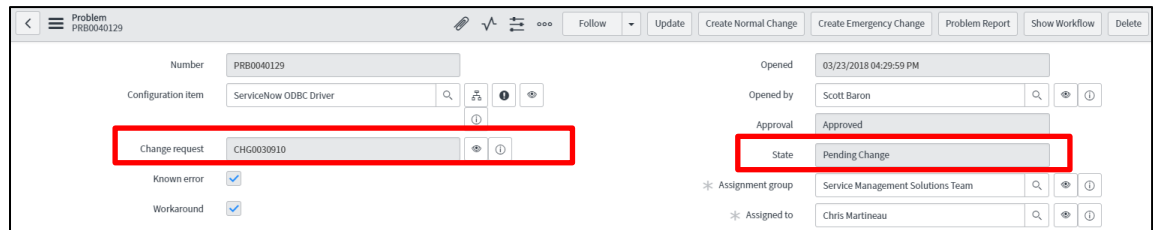
Incident/Request Management – This process is designed to manage and assist in restoring or providing service to customers as quickly as possible. The ability to prioritize incidents (something broken, not working or needs repair) according to business impact and urgency allows staff to focus efforts 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 help 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 enables 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.



Problem PRB0040129

Number: PRB0040129

Configuration item: ServiceNow ODBC Driver

Change request: CHG0030910

Known error: ☒

Workaround: ☒

Opened: 03/23/2018 04:29:59 PM

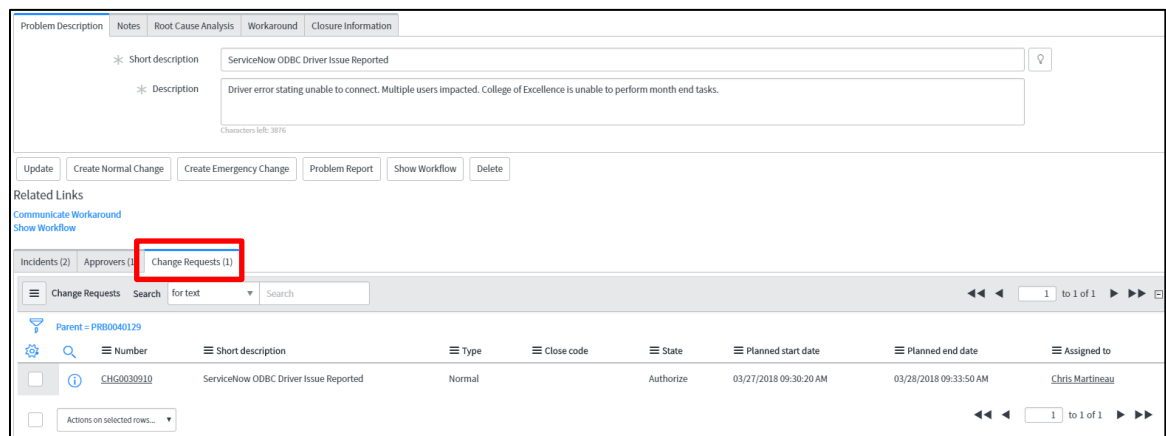
Opened by: Scott Baron

Approval: Approved

State: Pending Change

Assignment group: Service Management Solutions Team

Assigned to: Chris Martineau



Problem Description

Short description: ServiceNow ODBC Driver Issue Reported

Description: Driver error stating unable to connect. Multiple users impacted. College of Excellence is unable to perform month end tasks.

Update Create Normal Change Create Emergency Change Problem Report Show Workflow Delete

Related Links

Communicate Workaround Show Workflow

Incidents (2) Approvers (1) Change Requests (1)

Change Requests Search for text Search

Parent = PRB0040129

Number	Short description	Type	Close code	State	Planned start date	Planned end date	Assigned to
CHG0030910	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...

8. In this scenario, there was a workaround identified, therefore the problem record is NOT 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.

Incidents (2)

Approvers (1)

Change Requests (1)

Incidents

Edit

Search

for text

Search

1

to 2 of 2

Problem = PRB0040129

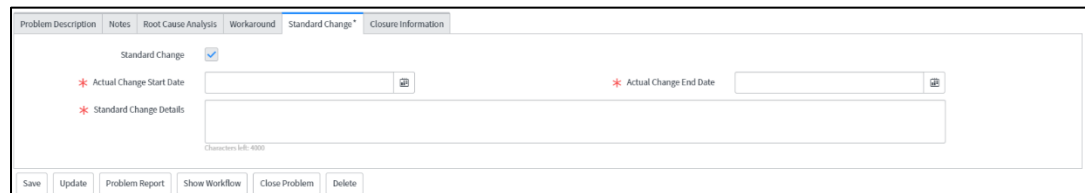
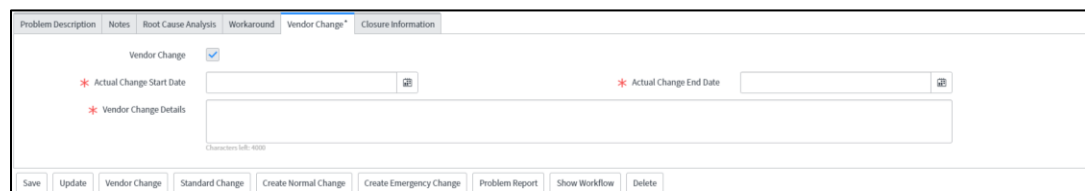
	Number	User	Short description	Category	Priority	State	Assignment group	Assigned to	Resolved	Closed	Change Request
<input type="checkbox"/>	INC0076388	Scott Baron	ServiceNow ODBC Driver Issue	Software	3 - Normal	Resolved	Service Management Solutions Team	Chris Martineau	03/27/2018 10:20:41 AM	(empty)	
<input type="checkbox"/>	INC0076387	Scott Baron	ServiceNow ODBC Driver Issue Reported	Software	3 - Normal	Resolved	Service Management Solutions Team	Chris Martineau	03/27/2018 10:20:45 AM	(empty)	

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?”)

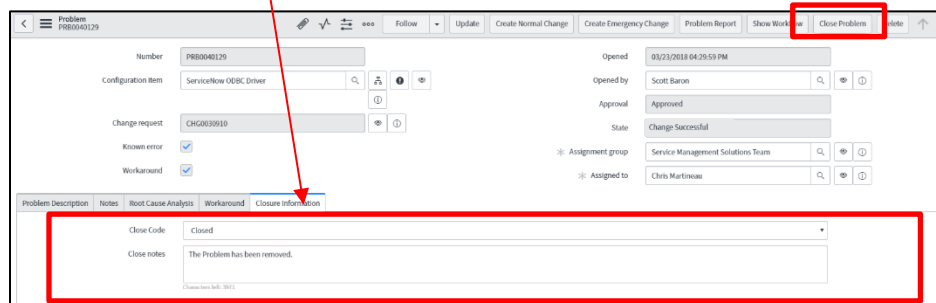
9. After the change record is closed with the applicable Close code (Successful, Successful with issues or Unsuccessful with the checkbox selected “Was this change successfully implemented outside of the planned change window?”) or a Vendor/Standard Change was implemented/selected, the problem record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

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





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.



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



The screenshot shows the UCF IT Problem Management interface for problem record PRB0040129. The record is titled "ServiceNow ODBC Driver". The state is "Closed", which is highlighted with a red box. Other fields include "Opened" (03/23/2018 04:29:59 PM), "Opened by" (Scott Baron), "Approval" (Approved), "Assignment group" (Service Management Solutions Team), and "Assigned to" (Chris Martineau). The "Change request" field is set to CHG0030910. The "Known error" and "Workaround" checkboxes are both checked.

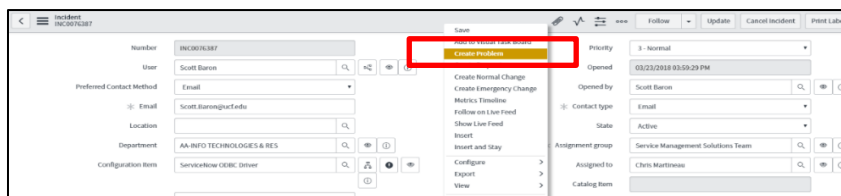
VI. STEPS TO RECORD PROBLEM RECORD – REACTIVE W/OUT WORKAROUND

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

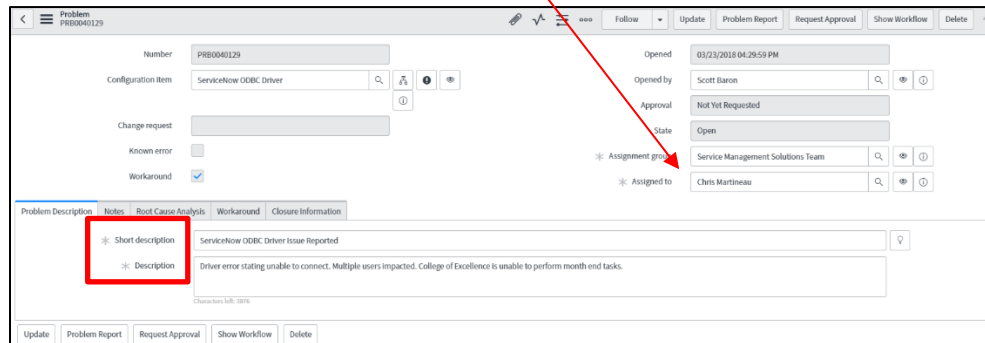


The screenshot shows the UCF IT Incident Management interface for incident record INC0076287. The incident is titled "ServiceNow ODBC Driver". The right-click context menu is open, and the "Create Problem" option is highlighted with a red box. Other fields include "User" (Scott Baron), "Preferred Contact Method" (Email), "Location" (Scott Baron@ucf.edu), "Department" (AA-INFO TECHNOLOGIES & RES), "Configuration item" (ServiceNow ODBC Driver), "Priority" (Normal), "Opened" (03/23/2018 03:59:29 PM), "Opened by" (Scott Baron), "Contact type" (Email), "State" (Active), "Assignment group" (Service Management Solutions Team), and "Assigned to" (Chris Martineau).

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

Number: PRB0040129

Configuration item: ServiceNow ODBC Driver

Change request: [Empty]

Known error: ☐

Workaround: ☒

Problem Description: Notes Root Cause Analysis Workaround Closure Information

Short description: ServiceNow ODBC Driver Issue Reported

Description: Driver error stating unable to connect. Multiple users impacted. College of Excellence is unable to perform month end tasks.

Opened: 03/23/2018 04:29:59 PM

Opened by: Scott Baron

Approval: Not Yet Requested

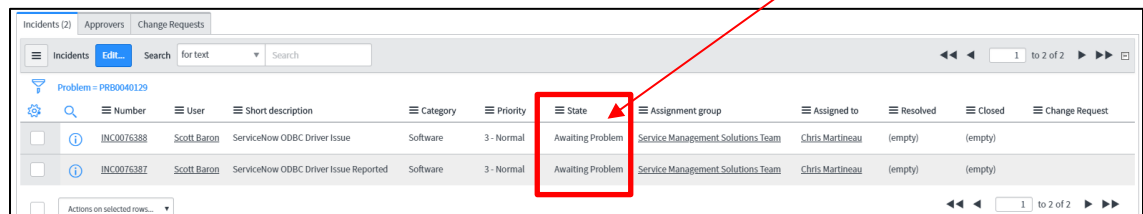
State: Open

Assignment group: Service Management Solutions Team

Assigned to: Chris Martineau

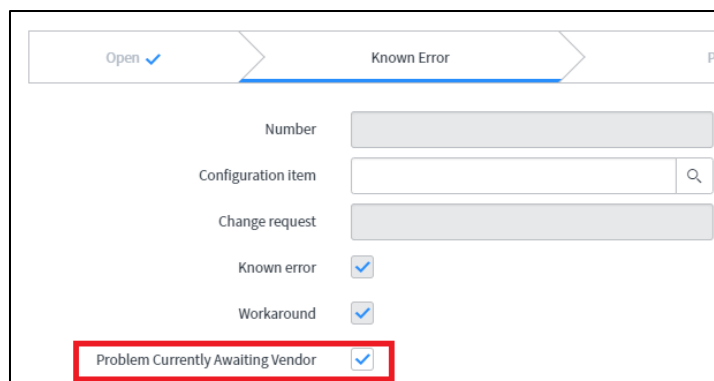
2. After the problem record is created, relate all other applicable incidents to the problem record. Reference Appendix A. Sections i. or ii. for instruction on how to relate incident(s) to problems records.

NOTE: After relating the incident(s), the state(s) on the incident(s) automatically change to Awaiting Problem. Per the UCF IT Incident Management Policy (located at <http://it.ucf.edu/policies-and-standards/it-service-management/>), 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.



Incidents (2)	Approvers	Change Requests
Problem = PRB0040129		
Number	User	Short description
INC0076388	Scott Baron	ServiceNow ODBC Driver Issue
INC0076387	Scott Baron	ServiceNow ODBC Driver Issue Reported
Category	Priority	State
Software	3 - Normal	Awaiting Problem
Software	3 - Normal	Awaiting Problem
Assignment group	Assigned to	Resolved
Service Management Solutions Team	Chris Martineau	(empty)
Service Management Solutions Team	Chris Martineau	(empty)

The Problem Owner can select the “Problem Currently Awaiting Vendor” checkbox which will change ALL related incident(s) to the Awaiting Vendor state.



Open ☒ Known Error ☐

Number: [Empty]

Configuration item: [Empty]

Change request: [Empty]

Known error: ☒

Workaround: ☒

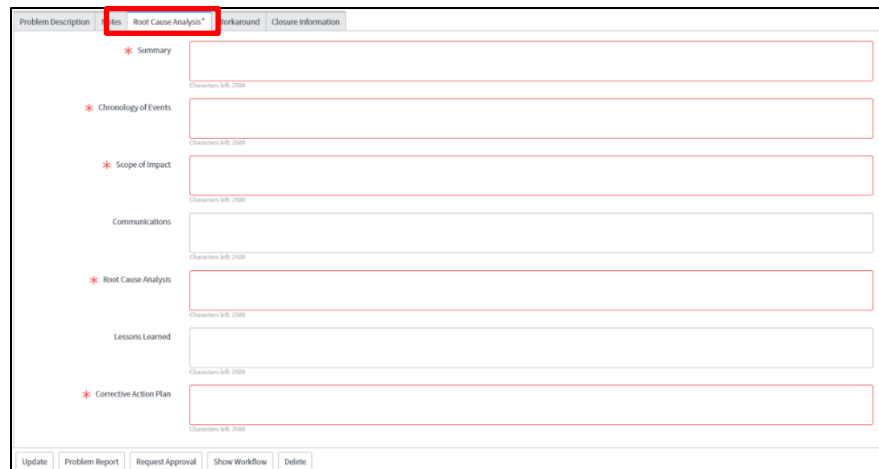
Problem Currently Awaiting Vendor: ☒

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.



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

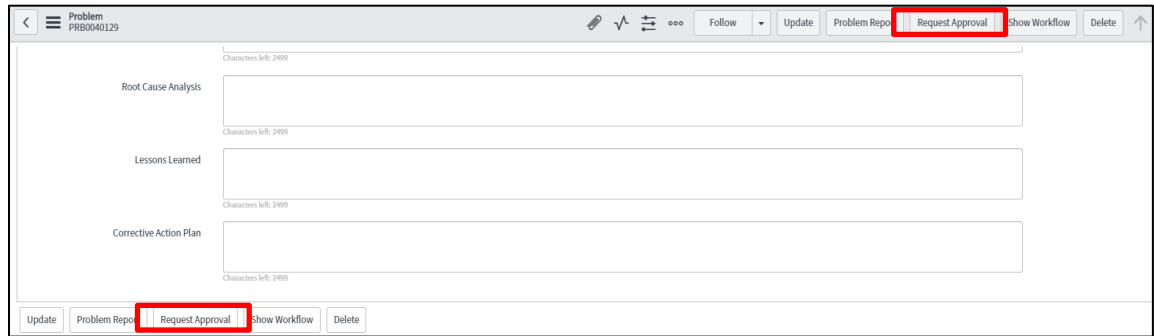
Communications: Optional field. Provide how the problem was communicated

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

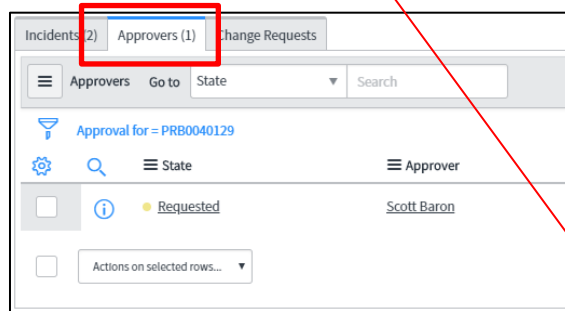
Root Cause Analysis

Lessons Learned

Corrective Action Plan

Update Problem Report Request Approval 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.

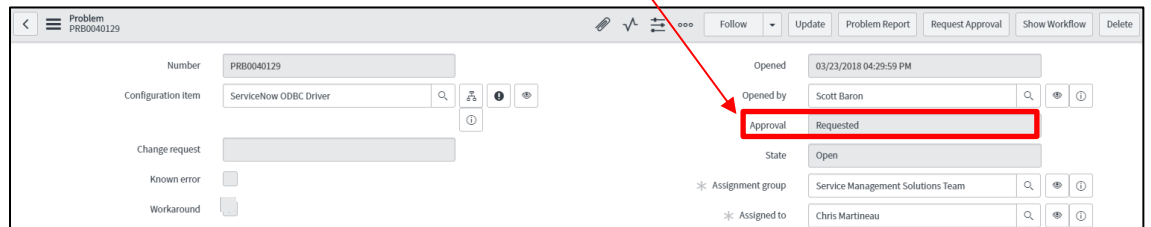


Incidents (2) Approvers (1) Change Requests

Approval for = PRB0040129

Requested

Scott Baron



Problem PRB0040129

Number PRB0040129

Configuration Item ServiceNow ODBC Driver

Change request

Known error

Workaround

Opened 03/23/2018 04:29:59 PM

Opened by Scott Baron

Approval Requested

State Open

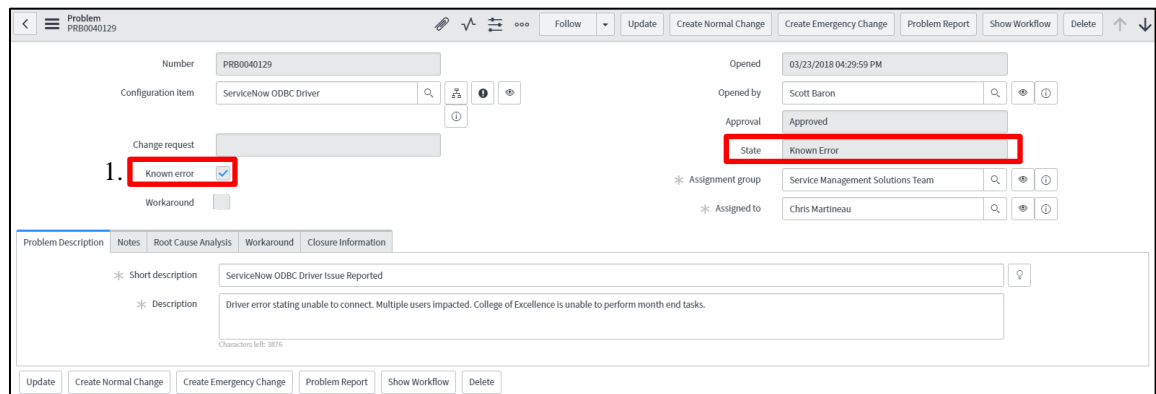
Assignment group Service Management Solutions Team

Assigned to Chris Martineau

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

Number: PRB0040129

Configuration Item: ServiceNow ODBC Driver

Change request: 1. Known error

Workaround: ☐

Opened: 03/23/2018 04:29:59 PM

Opened by: Scott Baron

Approval: Approved

State: Known Error

Assignment group: Service Management Solutions Team

Assigned to: Chris Martineau

Problem Description

Short description: ServiceNow ODBC Driver Issue Reported

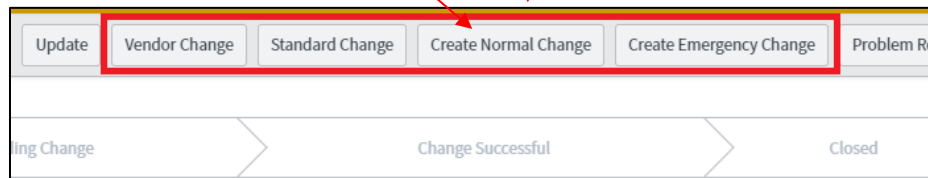
Description: Driver error stating unable to connect. Multiple users impacted. College of Excellence is unable to perform month end tasks.

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

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

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

Click “Create Normal Change”



Update Vendor Change Standard Change Create Normal Change Create Emergency Change Problem Report

ing Change Change Successful Closed

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/>

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 help increase the speed and consistency in the way changes are implemented while minimizing risk and errors.

[UCF IT Change Management Policy and Procedure](#)

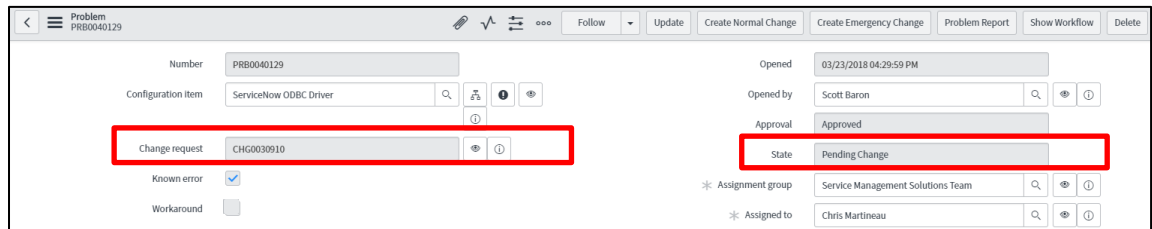
[UCF IT Change Management Change Record Procedure](#)

[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 enables 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.



Problem PRB0040129

Number: PRB0040129

Configuration Item: ServiceNow ODBC Driver

Change request: CHG0030910

Known error: ☒

Workaround: ☐

Opened: 03/23/2018 04:29:59 PM

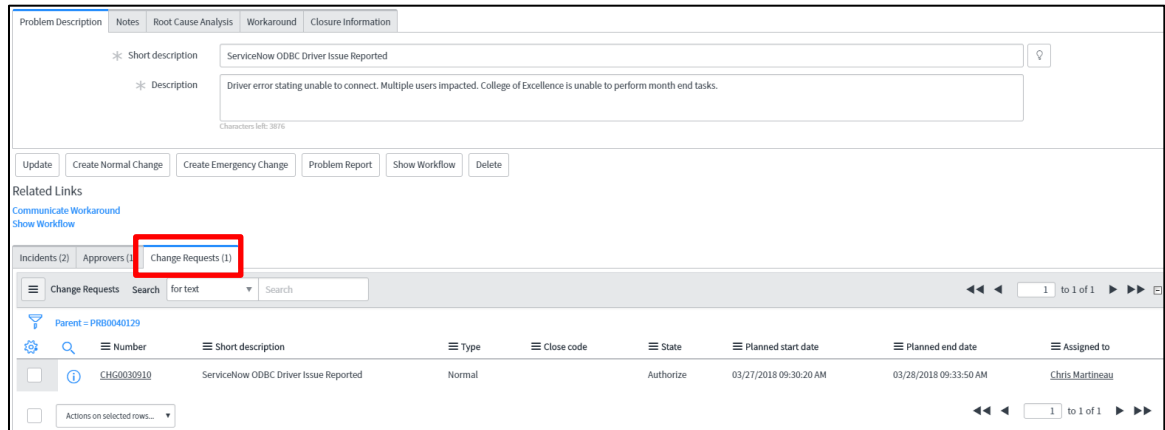
Opened by: Scott Baron

Approval: Approved

State: Pending Change

Assignment group: Service Management Solutions Team

Assigned to: Chris Martineau



Problem Description

Short description: ServiceNow ODBC Driver Issue Reported

Description: Driver error stating unable to connect. Multiple users impacted. College of Excellence is unable to perform month end tasks.

Update | Create Normal Change | Create Emergency Change | Problem Report | Show Workflow | Delete

Related Links

Communicate Workaround

Show Workflow

Incidents (2) | Approvals (2) | **Change Requests (1)**

Change Requests Search for text Search

Parent - PRB0040129	Number	Short description	Type	Close code	State	Planned start date	Planned end date	Assigned to
<input type="checkbox"/>	CHG0030910	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...

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.

Affected CIs (1)	Impacted Services/CIs	Approvers (8)	Change Tasks	Incidents Pending Change (2)	Incidents Caused By Change	Resource Plans	Problems (1)
<div>Incidents Pending Change New Search <input type="text" value="for text"/> Search</div>							
Change Request = CHG0030912							
		Number	User	Short description	Category	Priority	State
<input type="checkbox"/>		INC0076388	Scott Baron	ServiceNow ODBC Driver Issue	Software	3 - Normal	Awaiting Problem
<input type="checkbox"/>		INC0076387	Scott Baron	ServiceNow ODBC Driver Issue Reported	Software	3 - Normal	Awaiting Problem

8. After the change record is closed with the applicable Close code (Successful, Successful with issues or Unsuccessful with the checkbox selected “Was this change successfully implemented outside of the planned change window?”) or a Vendor/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 Vendor or Standard Change was implemented, a Vendor or 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 Analysis | Workaround | **Standard Change*** | Closure Information

Standard Change ☒

* Actual Change Start Date

* Actual Change End Date

* Standard Change Details

Characters left: 4000

Save | Update | Problem Report | Show Workflow | Close Problem | Delete

Problem Description | Notes | Root Cause Analysis | Workaround | **Vendor Change*** | Closure Information

Vendor Change ☒

* Actual Change Start Date

* Actual Change End Date

* Vendor Change Details

Characters left: 4000

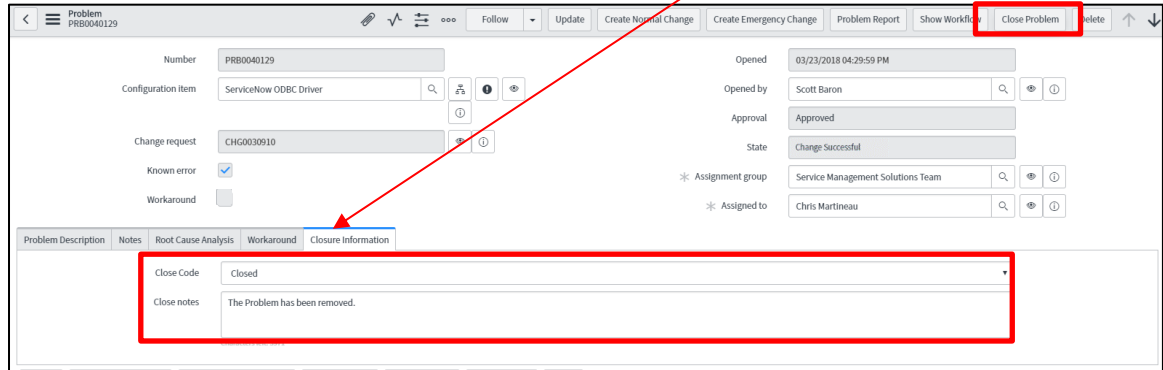
Save | Update | Vendor Change | Standard Change | Create Normal Change | Create Emergency Change | Problem Report | Show Workflow | Delete

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

Number: PRB0040129

Configuration item: ServiceNow ODBC Driver

Change request: CHG0030910

Known error: ☒

Workaround: ☐

Opened: 03/23/2018 04:29:59 PM

Opened by: Scott Baron

Approval: Approved

State: Change Successful

Assignment group: Service Management Solutions Team

Assigned to: Chris Martineau

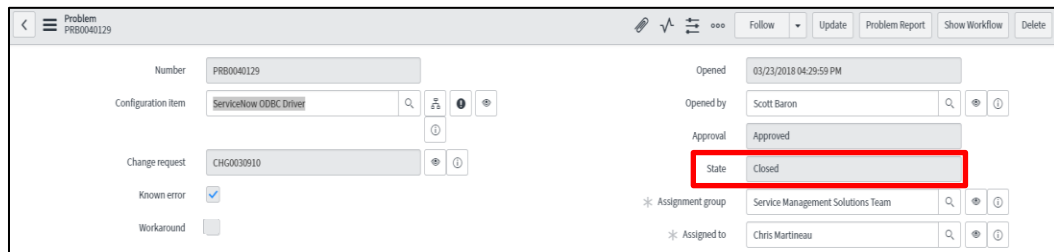
Problem Description | Notes | Root Cause Analysis | Workaround | **Closure Information**

Close Code: Closed

Close notes: The Problem has been removed.

Close Problem

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



Problem PRB0040129

Number: PRB0040129

Configuration item: ServiceNow ODBC Driver

Change request: CHG0030910

Known error: ☒

Workaround: ☐

Opened: 03/23/2018 04:29:59 PM

Opened by: Scott Baron

Approval: Approved

State: Closed

Assignment group: Service Management Solutions Team

Assigned to: Chris Martineau

Problem Description | Notes | Root Cause Analysis | Workaround | Closure Information

VII. STEPS TO RECORD PROBLEM RECORD – PROACTIVE

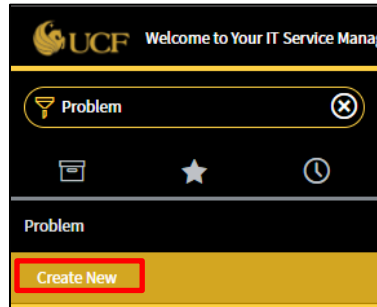
Identifying problems based on periodic scheduled reviews and analyses of closed incident patterns is referred to as proactive Problem Management. A problem record can be created as a standalone record with or without relating incident records.

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 ALWAYS 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



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. After the proactive problem record is created, follow the same steps of Section VI. or Section V. starting with Step 2.

Relating the incident(s) will be based off the direction of Section B. of the Appendix.

VIII. STEPS TO RECORD PROBLEM RECORD – RETRO

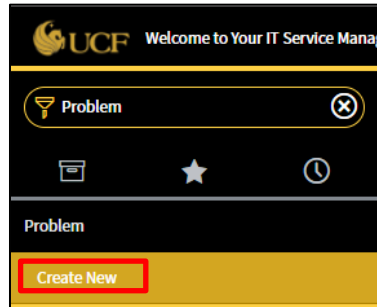
There may be occasions when the UCF IT Problem Management process cannot be followed in its entirety/order due to Emergency changes that must to be introduced as soon as possible to restore services. If an Emergency change is not implemented as soon as possible, the identified issue could create significant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

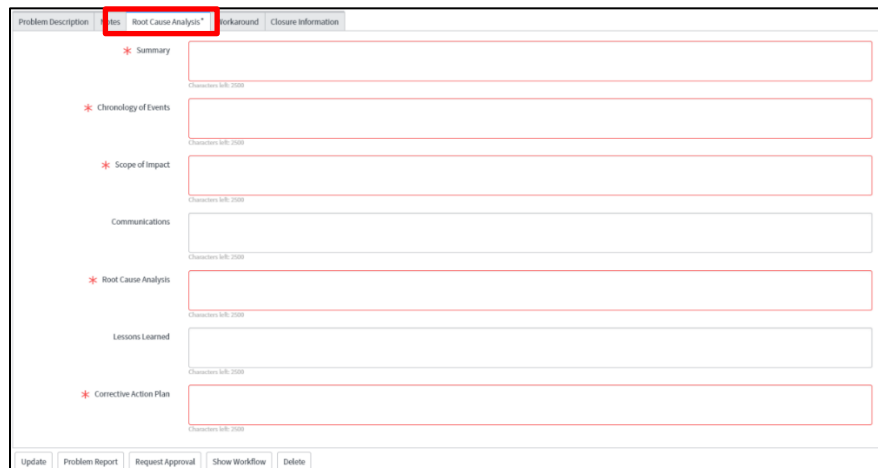
There is one way to create a retro problem record:

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



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 “The 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.



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

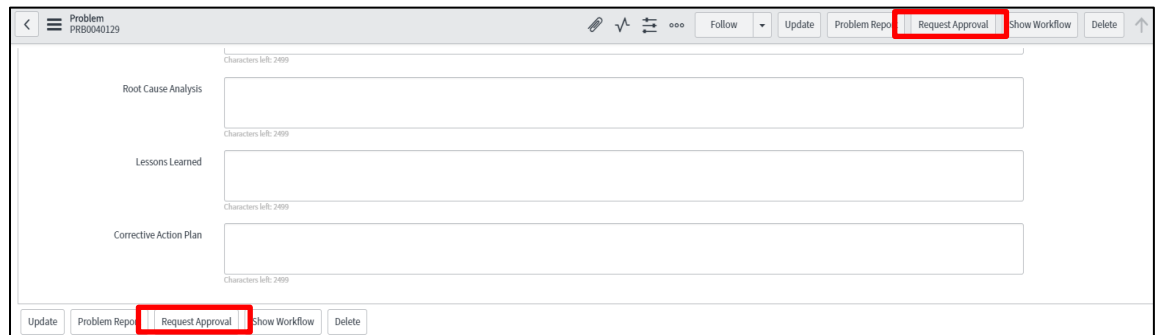
Communications: Optional field. Provide how the problem was communicated

Root Cause Analysis: Provide the root cause of the problem

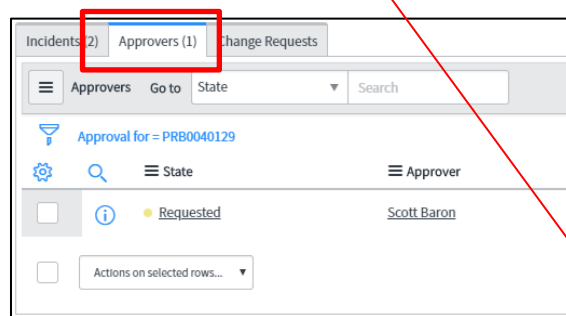
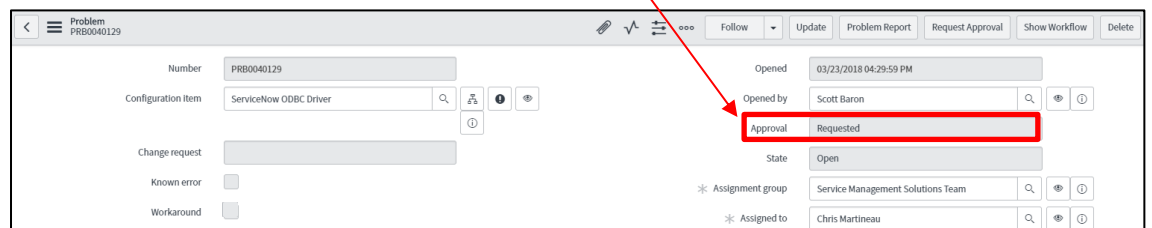
Lessons Learned: Optional field. Provide the lessons learned

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.

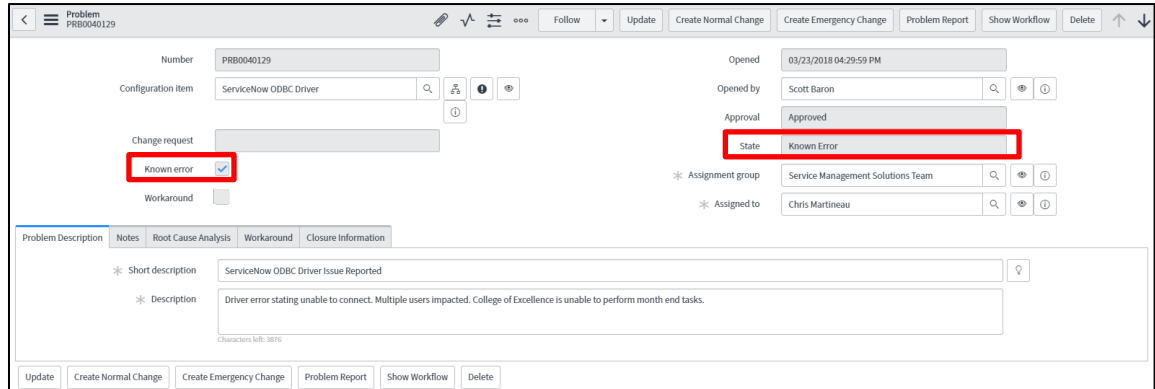


The Approvers section/tab located on the problem record will indicate there is an Approval Requested. The Approval field in the top section of the problem record will also indicate the Approval has been Requested/Rejected.

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

Number: PRB0040129

Configuration Item: ServiceNow ODBC Driver

Change request: [Redacted]

Known error: ☒

Workaround: [Redacted]

Opened: 03/23/2018 04:29:59 PM

Opened by: Scott Baron

Approval: Approved

State: Known Error

Assignment group: Service Management Solutions Team

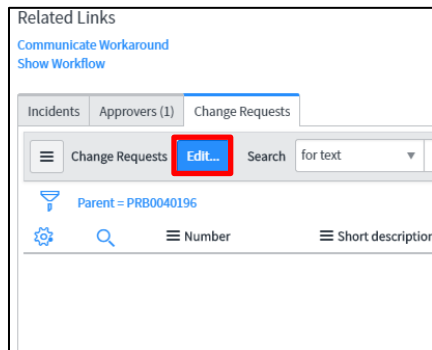
Assigned to: Chris Martineau

Problem Description: ServiceNow ODBC Driver Issue Reported

Description: Driver error stating unable to connect. Multiple users impacted. College of Excellence is unable to perform month end tasks.

- 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 Links

[Communicate Workaround](#)

[Show Workflow](#)

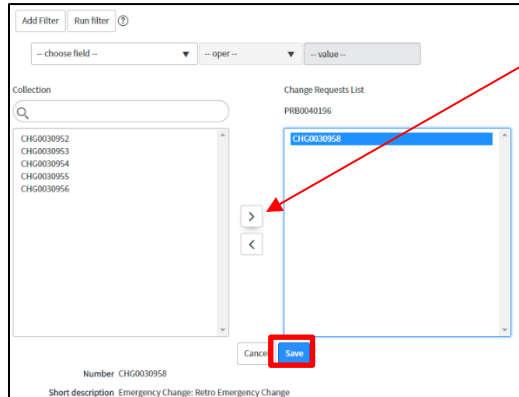
Incidents Approvers (1) Change Requests

Change Requests **Edit...** Search for text

Parent = PRB0040196

Number Short description

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



Collection

Change Requests List

PRB0040196

CHG0030952

CHG0030953

CHG0030954

CHG0030955

CHG0030956

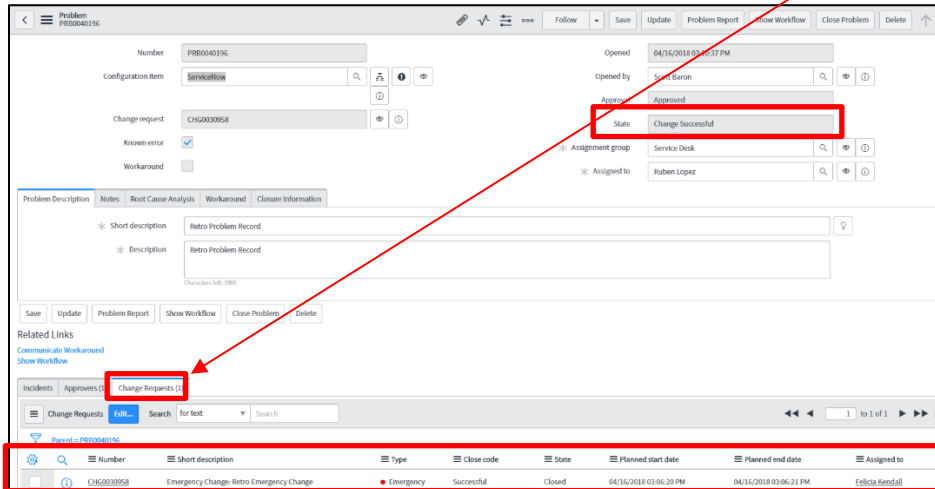
CHG0030958

Number CHG0030958

Short description Emergency Change: Retro Emergency Change

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

Number PRB0040196

Configuration Item ServiceDesk

Change request CHG0030958

Known error ☒

Workaround ☐

Opened 04/16/2018 03:10:17 PM

Opened by Scott Baron

Approved

State Change Successful

Assignment group Service Desk

Assigned to Ruben Lopez

Problem Description

Notes Root Cause Analysis Workaround Closure Information

Short description Retro Problem Record

Description Retro Problem Record

Save Update Problem Report Show Workflow Close Problem Delete

Related Links

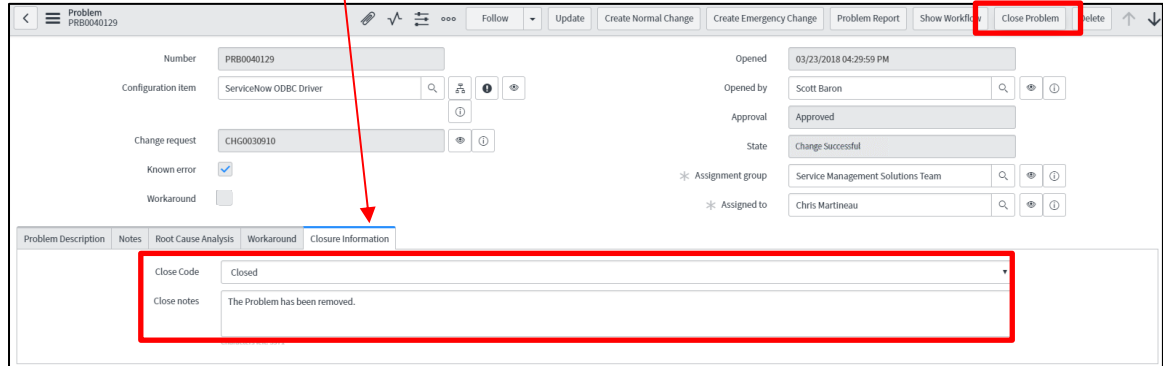
Communicate Workaround Show Workflow

Change Requests

Change Requests (1)

Number	Short description	Type	Close code	State	Planned start date	Planned end date	Assigned to
CHG0030958	Emergency Change: Retro Emergency Change	Emergency	Successful	Closed	04/16/2018 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.



The screenshot displays the UCF IT Problem Management interface for problem PRB0040129. The 'Close Problem' button in the top right corner is highlighted with a red box. A red arrow points from this button to the 'Closure Information' tab in the bottom navigation bar. The 'Closure Information' tab is also highlighted with a red box. Within this tab, the 'Close Code' dropdown is set to 'Closed', and the 'Close notes' field contains the text 'The Problem has been removed.'.

Field	Value
Number	PRB0040129
Configuration item	ServiceNow ODBC Driver
Change request	CHG0030910
Known error	<input checked="" type="checkbox"/>
Workaround	<input type="checkbox"/>
Opened	03/23/2018 04:29:59 PM
Opened by	Scott Baron
Approval	Approved
State	Change Successful
* Assignment group	Service Management Solutions Team
* Assigned to	Chris Martineau
Close Code	Closed
Close notes	The Problem has been removed.

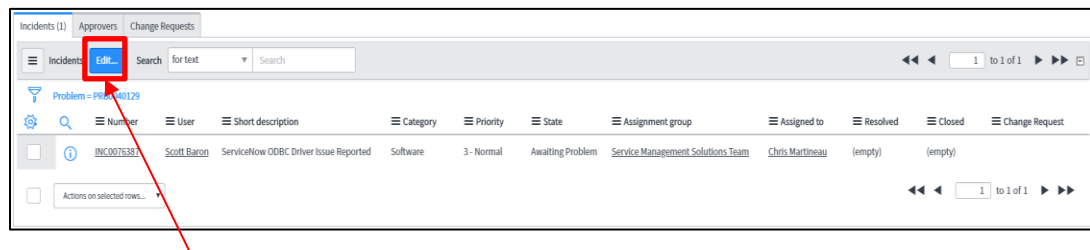
IX. APPENDIX

A. RELATING ACTIVE (OPENED) INCIDENTS TO PROBLEM RECORDS

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

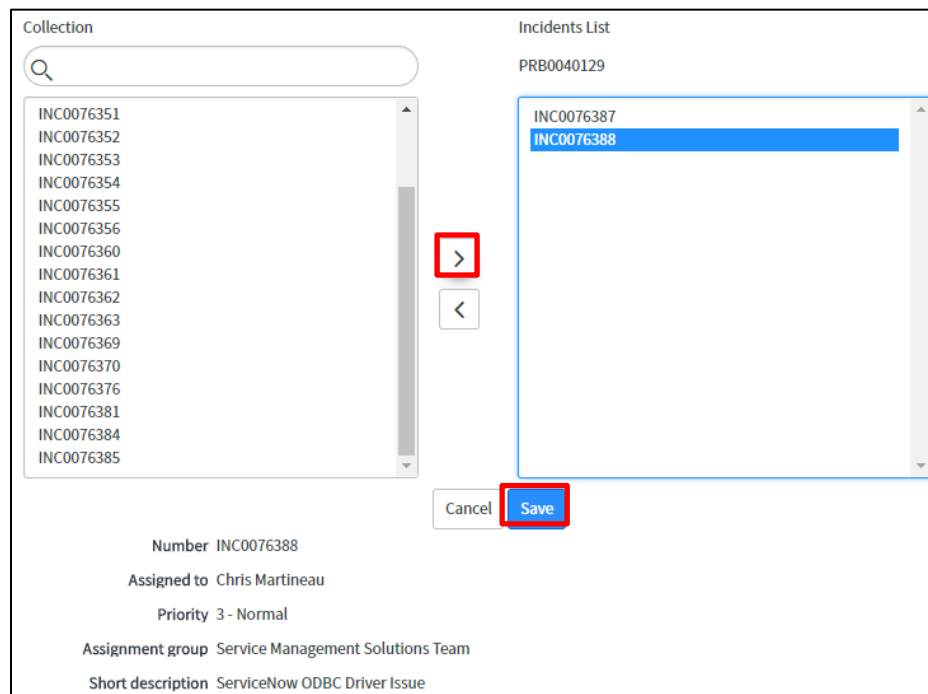
i. From the Problem Record

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



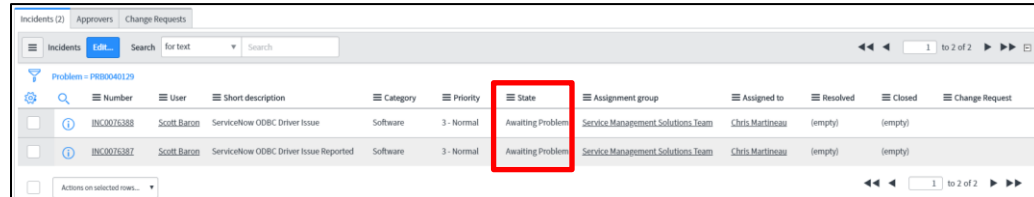
Click on Edit

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



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.

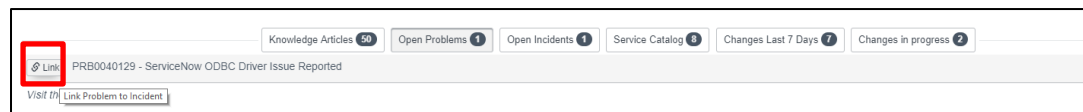


Incidents (2)	Approvers	Change Requests
Incidents	1 of 1	Search for text
Problem - PRB0040129		
Number	User	Short description
INC0076388	Scott Barton	ServiceNow ODBC Driver Issue
INC0076387	Scott Barton	ServiceNow ODBC Driver Issue Reported
Category	Priority	State
Software	3 - Normal	Awaiting Problem
Software	3 - Normal	Awaiting Problem
Assignment group	Assigned to	Resolved
Service Management Solutions Team	Chris Martineau	(empty)
Service Management Solutions Team	Chris Martineau	(empty)
Closed	Change Request	
(empty)	(empty)	

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.

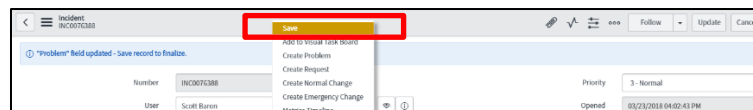


Knowledge Articles	Open Problems	Open Incidents	Service Catalog	Changes Last 7 Days	Changes in progress
50	1	1	1	7	2

Link PRB0040129 - ServiceNow ODBC Driver Issue Reported

Visit the 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



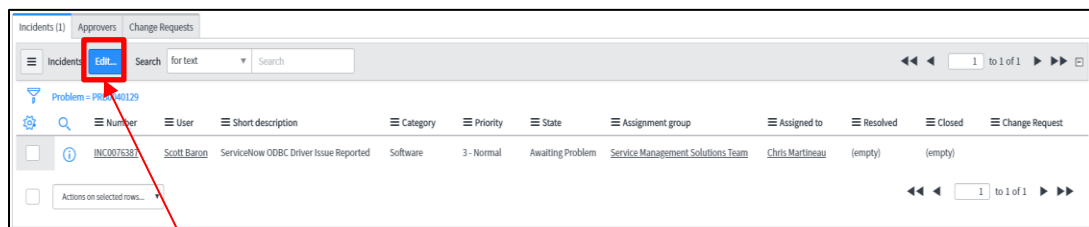
Incident	INC0076388	Save	Follow	Update	Cancel
Add to your save history					
Create Problem					
Create Request					
Create Normal Change					
Create Emergency Change					
Metrics Timeline					
Number	INC0076388	Priority	3 - Normal		
User	Scott Barton	Opened	8/23/2018 04:00:43 PM		

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

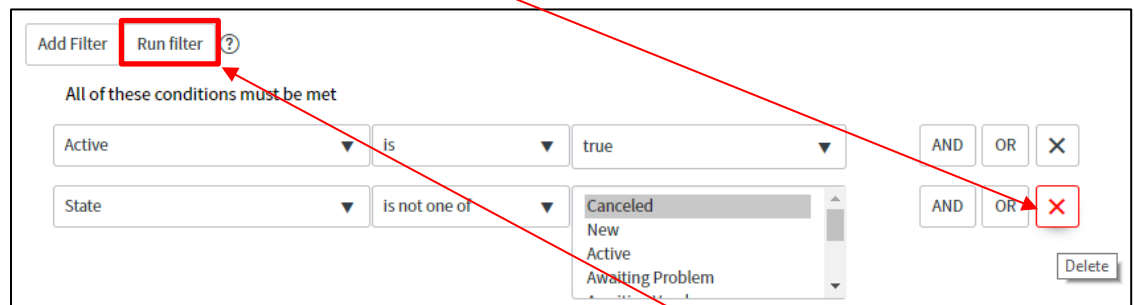
To relate applicable incidents to the problem record. Go to the Incidents section/tab



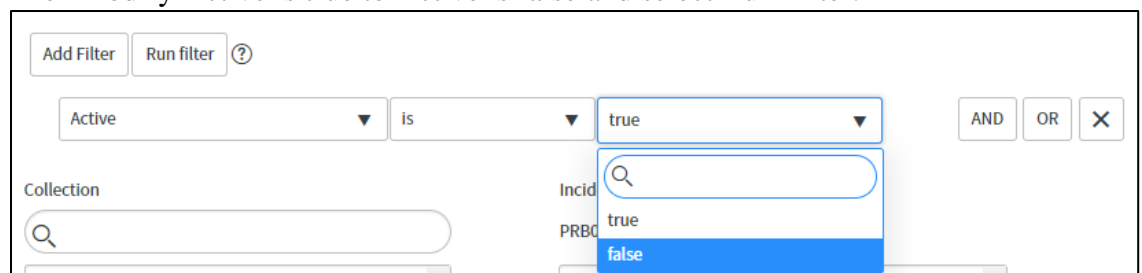
Click on Edit

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

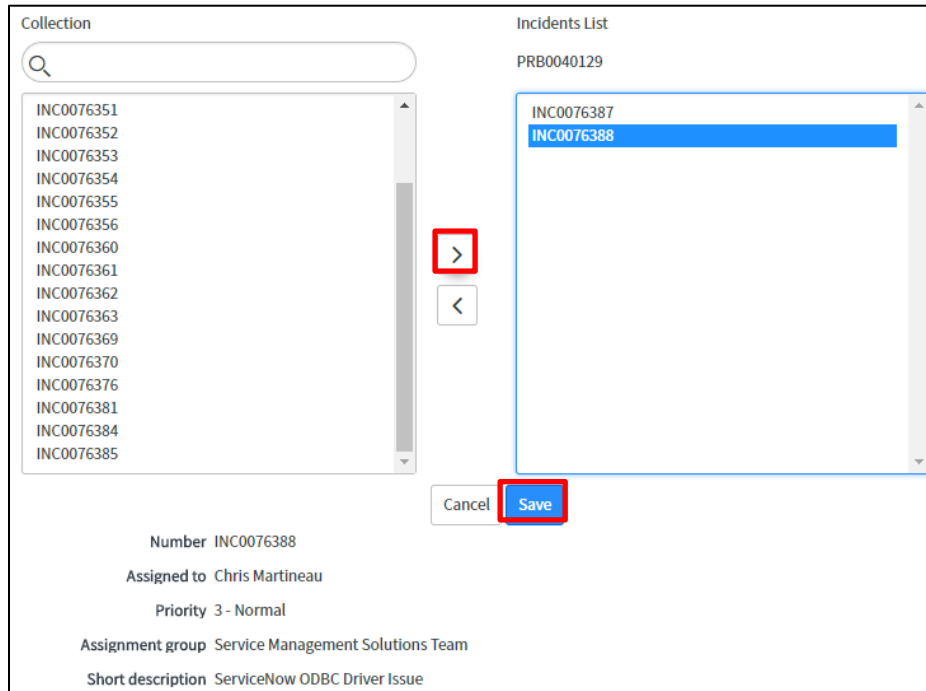
Select the “X” (Delete) from the State condition row to remove the condition.



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



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

PRB0040129

INC0076351
INC0076352
INC0076353
INC0076354
INC0076355
INC0076356
INC0076360
INC0076361
INC0076362
INC0076363
INC0076369
INC0076370
INC0076376
INC0076381
INC0076384
INC0076385

INC0076387
INC0076388

Cancel Save

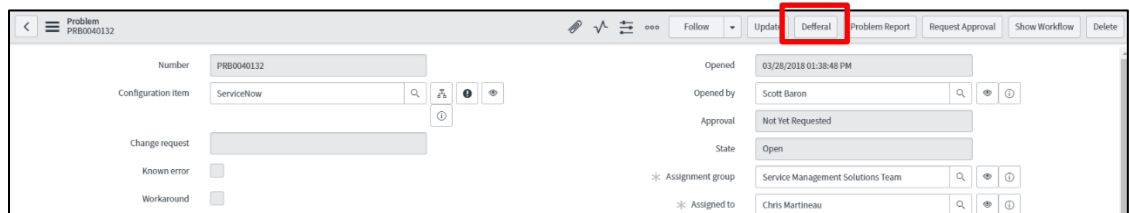
Number INC0076388
Assigned to Chris Martineau
Priority 3 - Normal
Assignment group Service Management Solutions Team
Short description ServiceNow ODBC Driver Issue

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

Follow Update Deferral Problem Report Request Approval Show Workflow Delete

Number PRB0040132

Configuration Item ServiceNow

Change request

Known error

Workaround

Opened 03/28/2018 01:38:48 PM

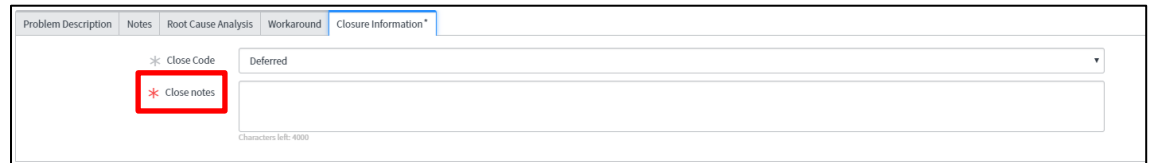
Opened by Scott Baron

Approval Not Yet Requested

State Open

* Assignment group Service Management Solutions Team

* Assigned to Chris Martineau



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 PRB00040132 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.

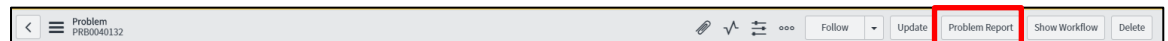
Thank you.

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.

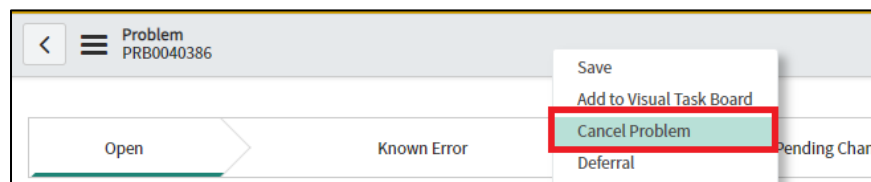


By clicking this button, ServiceNow generates a PDF, which is downloaded to the client's browser's default location.

E. CANCELING A PROBLEM RECORD

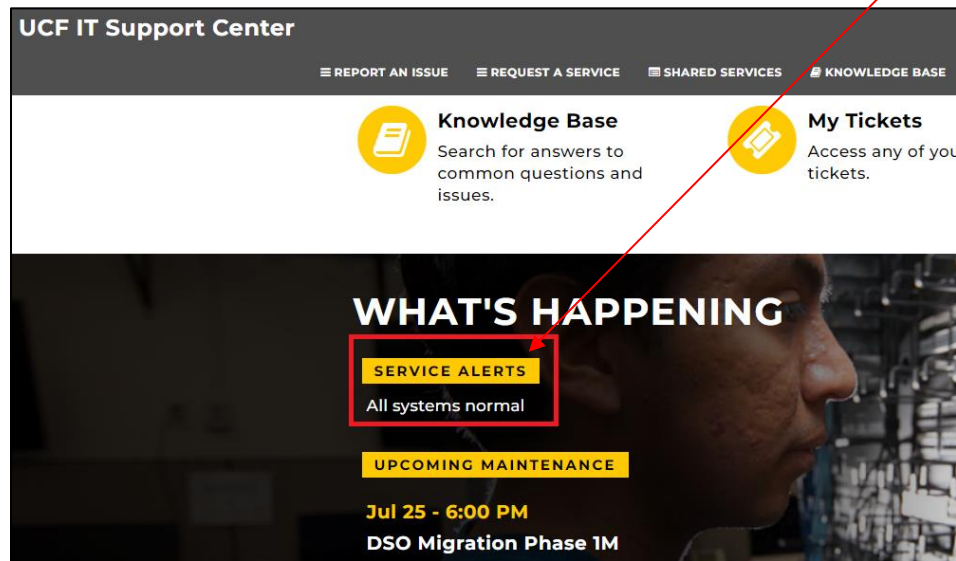
At any point, the Problem Owner can cancel the problem record. The problem record cannot be canceled if the problem is already in a closed state.

To cancel a problem record, right click on the grey Problem header bar and select “Cancel Problem”.



F. SELF-SERVICE PORTAL (SSP) COMMUNICATION - ALERT/UPDATE

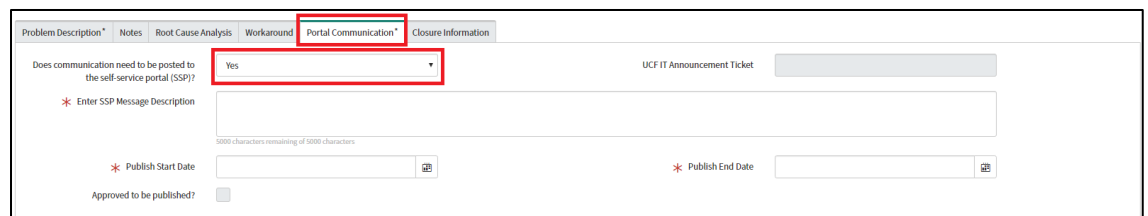
After the problem record is created (following the steps within Sections V., VI. or VII. of this document), the Problem Owner is able to submit and post external communication to the self-service portal (SSP) if deemed necessary. This functionality allows the Problem Owner to post and routinely update service alerts (problem status) directly from the problem record.



i. Initial Post Instruction:

To initially post a service alert to the SSP from the problem record, you will need to fill out the “Portal Communication” section/tab.

For the question “Does communication need to be posted to the self-service portal (SSP)?” select “Yes”.



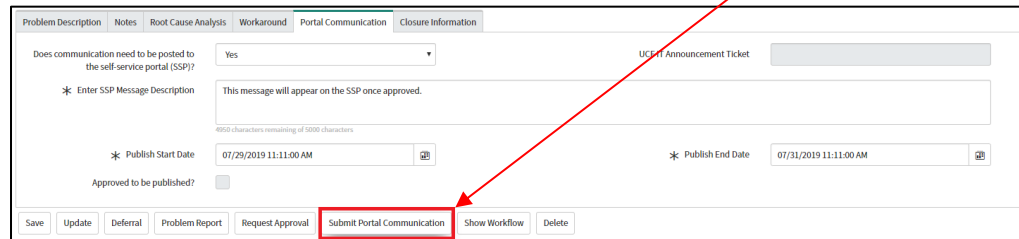
After selecting “Yes”, you will need to fill out the remaining fields.

- * Enter SSP Message Description
 - o The text entered will be the exact message that will be submitted for approval to the Assignment Group Manager and then UCF IT Communications. If approved, the message will post to the service

alerts section of the SSP within the publish start and end dates defined.

- * Publish Start Date – This date is chosen for when the service alert should appear on the SSP
- * Publish End Date – This date is chosen for when the service alert should be taken down from the SSP

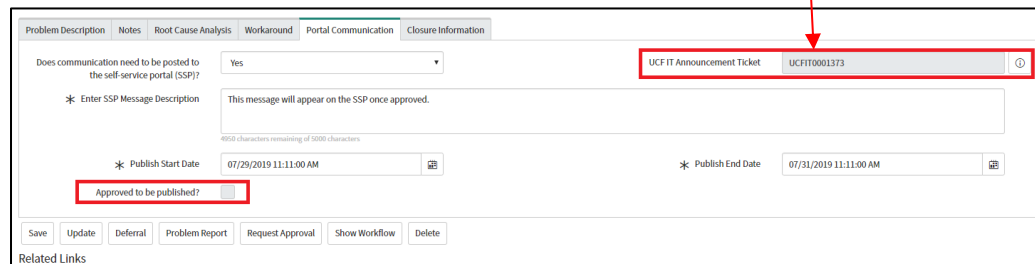
Once the fields are filled out, you will need to select Submit Portal Communication.



The screenshot shows the 'Portal Communication' tab with the following fields: 'Does communication need to be posted to the self-service portal (SSP)?' (Yes), 'Enter SSP Message Description' (This message will appear on the SSP once approved.), 'Publish Start Date' (07/29/2019 11:11:00 AM), 'Publish End Date' (07/31/2019 11:11:00 AM), and 'Approved to be published?' (unchecked). The 'Submit Portal Communication' button is highlighted with a red box and a red arrow pointing to it from the text above.

After submitting, you will see a UCF IT Announcement Ticket ID appear.

The Approved to be published? Checkbox will not be checked until the two required approvals are complete.



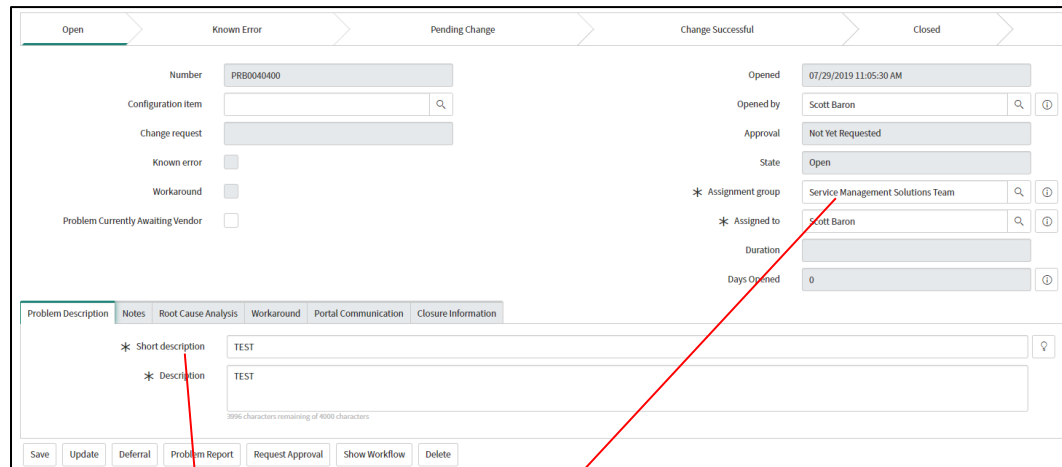
The screenshot shows the 'Portal Communication' tab after submission. The 'UCF IT Announcement Ticket' field now displays 'UCFIT0001373'. The 'Approved to be published?' checkbox remains unchecked. A red box highlights the 'UCF IT Announcement Ticket' field and the 'Approved to be published?' checkbox, with a red arrow pointing to the ticket ID from the text above.

After the Submit Portal Communication button is selected, a UCF IT Announcement service alert request is generated automatically. The problem record Short description comes across as the Announcement Title and the SSP Message Description is the Announcement Details.

The Assignment Group Manager will be notified to approve a service alert request and then UCF IT Communications will be notified for approval following the Assignment Group Manager. Both approvals are required for the first initial SSP message to post.

Following selecting the Submit Portal Communication button:

- Problem record to UCF IT Announcement Service Alert record relationships:



Open > Known Error > Pending Change > Change Successful > Closed

Number: PRB0040400

Configuration Item: [Search]

Change request: [Text Area]

Known error: ☐

Workaround: ☐

Problem Currently Awaiting Vendor: ☐

Opened: 07/29/2019 11:05:30 AM

Opened by: Scott Baron

Approval: Not Yet Requested

State: Open

* Assignment group: Service Management Solutions Team

* Assigned to: Scott Baron

Duration: [Text Area]

Days Opened: 0

Problem Description | Notes | Root Cause Analysis | Workaround | Portal Communication | Closure Information

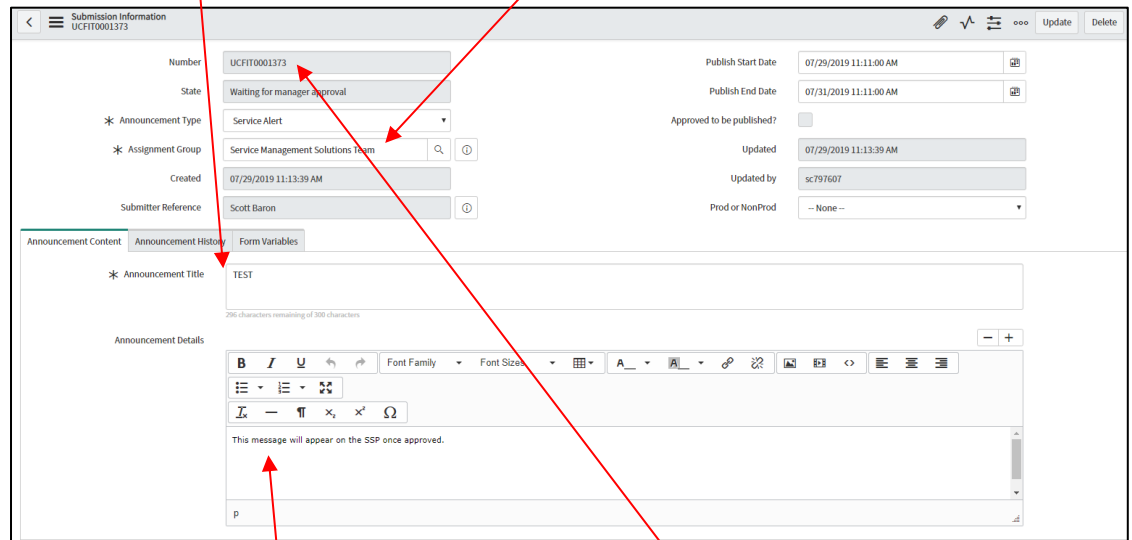
* Short description: TEST

* Description: TEST

3996 characters remaining of 4000 characters

Save | Update | Deferral | Problem Report | Request Approval | Show Workflow | Delete

- UCF IT Announcement Service Alert record:



Submission Information UCFIT0001373

Number: UCFIT0001373

State: Waiting for manager approval

* Announcement Type: Service Alert

* Assignment Group: Service Management Solutions Team

Created: 07/29/2019 11:13:39 AM

Submitter Reference: Scott Baron

Publish Start Date: 07/29/2019 11:11:00 AM

Publish End Date: 07/31/2019 11:11:00 AM

Approved to be published?: ☐

Updated: 07/29/2019 11:13:39 AM

Updated by: sc797607

Prod or NonProd: -- None --

Announcement Content | Announcement History | Form Variables

* Announcement Title: TEST

295 characters remaining of 300 characters

Announcement Details

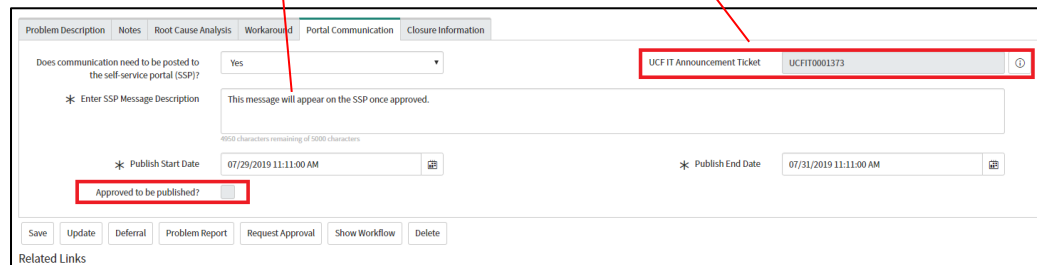
B I U [Icons] Font Family Font Size [Icons] A_ [Icons]

This message will appear on the SSP once approved.

P

Update | Delete

- Problem record/Portal Communications section/tab:



Problem Description | Notes | Root Cause Analysis | Workaround | Portal Communication | Closure Information

Does communication need to be posted to the self-service portal (SSP)? Yes

* Enter SSP Message Description: This message will appear on the SSP once approved.

4950 characters remaining of 5000 characters

* Publish Start Date: 07/29/2019 11:11:00 AM

* Publish End Date: 07/31/2019 11:11:00 AM

Approved to be published?: ☐

UCF IT Announcement Ticket UCFIT0001373

Save | Update | Deferral | Problem Report | Request Approval | Show Workflow | Delete

Related Links

UCF IT Announcement Service Alert record:

- Two approvals (Assignment Group Manager and UCF IT Communications):

Update

Delete

Announcement Approvals (2)

Attachments

Audit History (14)

Audit Records (4)

Certification Elements

Announcement Approvals

Now

Search

State

Search

1

to 2 of 2

Approvals

		State	Approver	Comments	Approval for	Task type	Created
<input type="checkbox"/>		Approved	Scott Baron		(empty)		07/29/2019 11:13:39 AM
<input type="checkbox"/>		Approved	Craig Froehlich		(empty)		07/29/2019 11:22:14 AM
<div>Actions on selected rows...</div>							

1

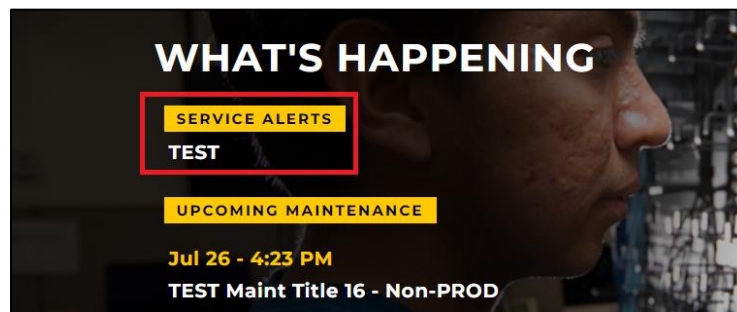
to 2 of 2

Problem record/Portal Communications section/tab:

- Approved to be published

Problem Description	Notes	Root Cause Analysis	Workaround	Portal Communication	Closure Information
Does communication need to be posted to the self-service portal (SSP)?		Yes		UCF IT Announcement Ticket: UCFIT0001373	
* Enter SSP Message Description		This message will appear on the SSP once approved.			
* Publish Start Date		07/29/2019 11:11:00 AM		* Publish End Date	
* Approved to be published?		Yes			
Save	Update	Deferral	Problem Report	Request Approval	Show Workflow
Delete					

SSP view once approved:

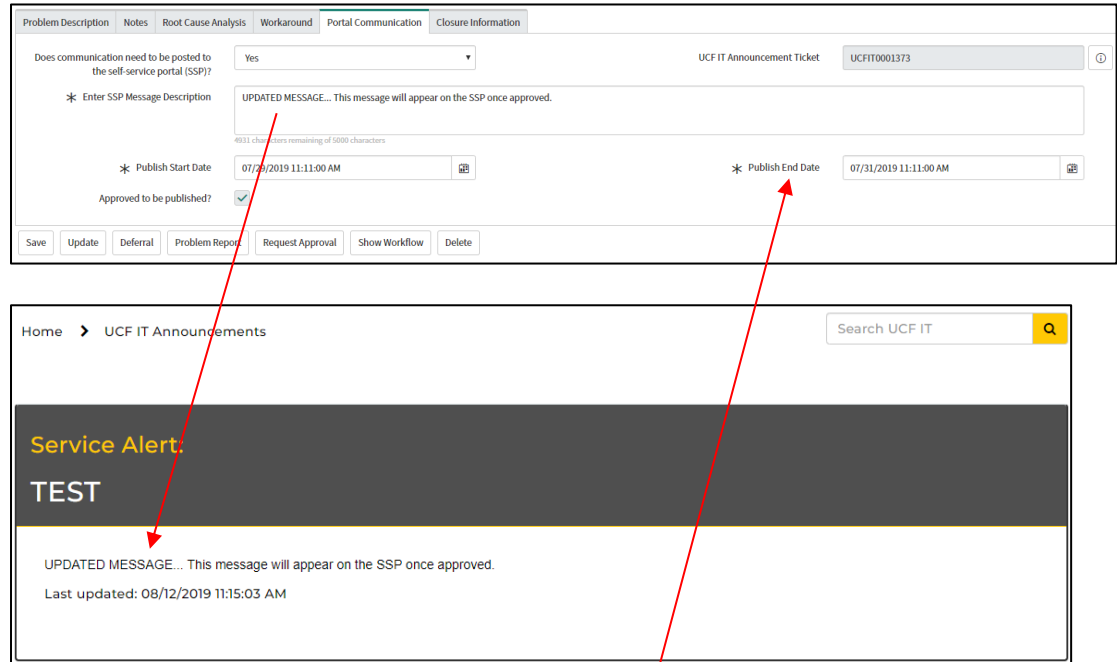


Clicking into the service alert matches SSP Message Description.

Home > UCF IT Announcements	Search UCF IT <input type="text"/>
Service Alert:	
TEST	
This message will appear on the SSP once approved.	
Last updated: 08/12/2019 11:13:23 AM	

ii. Updating Service Alert Post from the Problem Record:

Following the initial post, the Problem Owner can update the SSP Message Description directly from the problem record without approvals required. Once the text is modified, the Problem Owner can Save or Update the problem record.



The screenshot displays the 'Portal Communication' tab of a problem record. The 'Enter SSP Message Description' field contains the text 'UPDATED MESSAGE... This message will appear on the SSP once approved.' The 'Publish Start Date' is set to 07/26/2019 11:11:00 AM and the 'Publish End Date' is set to 07/31/2019 11:11:00 AM. The 'Approved to be published?' checkbox is checked. Below the form, the 'UCF IT Announcements' list shows a 'Service Alert: TEST' post with the same description and a 'Last updated' timestamp of 08/12/2019 11:15:03 AM. Red arrows indicate the flow from the 'Enter SSP Message Description' field to the 'Service Alert: TEST' post in the 'UCF IT Announcements' list.

NOTE: UCF IT Communications will be systematically notified on every SSP message update following the initial post.

To take down the SSP post, modify the Publish End Date to a past date and time and then Save or Update the record.