

Title: UCF IT Problem Management – Problem Record Procedure	Effective: 05/11/2018
	Revised: 02/02/2022
Approved By: Matthew Hall, VP of IT and CIO	Page 1 of 42

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
All sections requiring updates	02/02/2022	Scott Baron	Pertinent updates; Appendix F replaced - Statuspage

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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 VP of IT & CIO 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.

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.

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.

Statuspage: External web page displaying UCF service status (<https://status.ucf.edu>).

Major Incident: Incident that results in significant disruption to the business and demands a response/communication beyond the routine Incident Management process. Major incidents have a separate procedure ([UCF IT Outage Communication Checklist](#)). The UCF IT services listed on [Statuspage](#) will drive the Major Incident process inclusive of Problem Management.

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 Interaction 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.

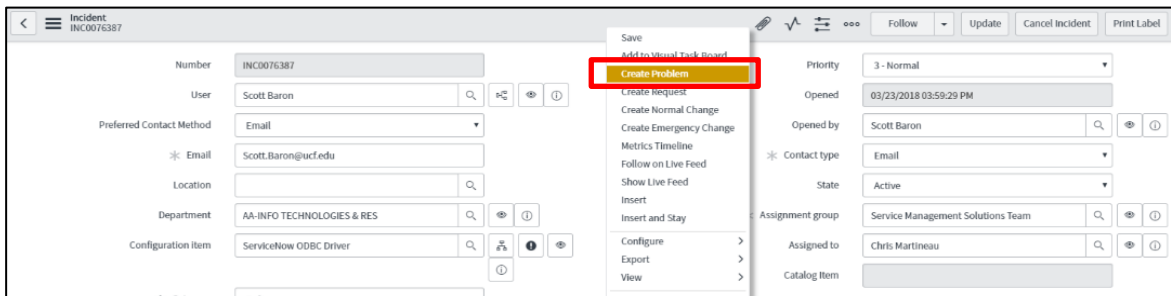
V. STEPS TO RECORD PROBLEM RECORD – REACTIVE W/ WORKAROUND

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

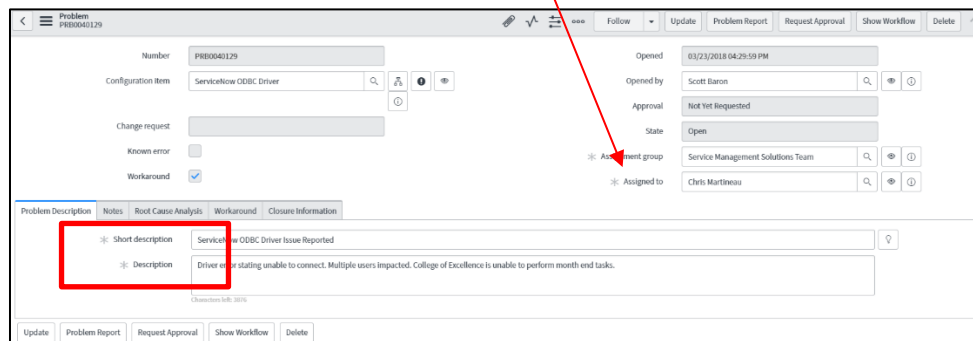


The screenshot shows the 'Incident' record for INC0076387. A right-click context menu is open over the incident header bar, with the 'Create Problem' option highlighted in yellow. The incident details on the left include: Number (INC0076387), User (Scott Baron), Preferred Contact Method (Email), Email (Scott.Baron@ucf.edu), Location, Department (AA-INFO TECHNOLOGIES & RES), and Configuration Item (ServiceNow ODBC Driver). The right sidebar shows: 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 right include: 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 problem record to the 'Assigned to' field in the incident record from the previous 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 = PRB0040129

	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)	

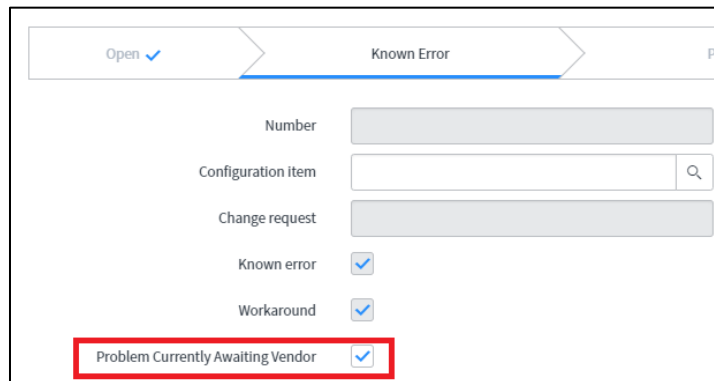
Actions on selected rows...

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

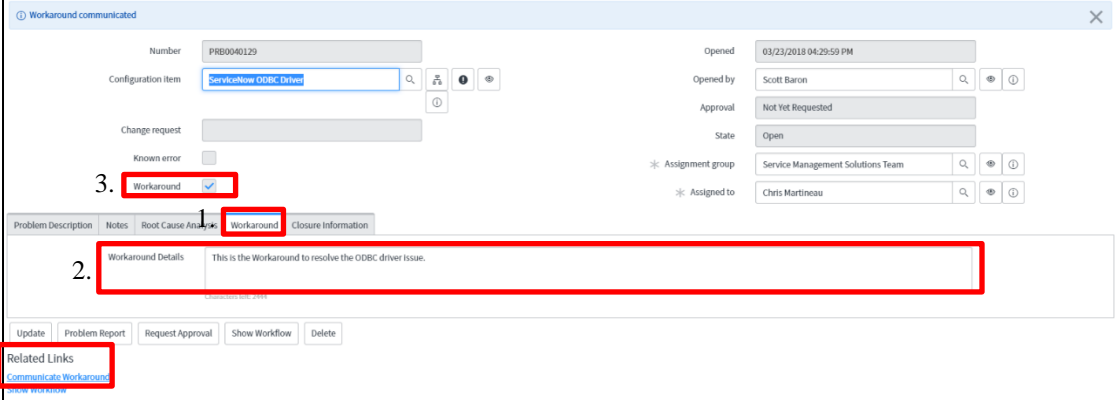
The Problem Owner is responsible to document the workaround in the problem record. This will provide the information necessary to resolve the existing incident(s) related to the problem record without relying on a change to be successfully implemented in order to resolve the incident(s).

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.

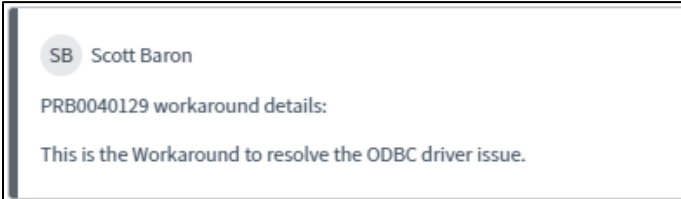
To communicate the workaround to all of the related incidents, select the Communicate Workaround link (4.) within the Related Links section.

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



The screenshot shows a ServiceNow problem record for PRB0040129. The interface includes fields for Number, Configuration Item (ServiceNow ODBC Driver), Change request, Known error, and Workaround (checked). The Workaround Details section contains the text: "This is the Workaround to resolve the ODBC driver issue." The Related Links section at the bottom shows the "Communicate Workaround" link highlighted. Red boxes and numbers 1 through 4 indicate the steps: 1. Workaround checkbox, 2. Workaround Details text area, 3. Workaround checkbox (repeated), and 4. Communicate Workaround link.

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.



The screenshot shows an email notification from Scott Baron (SB) regarding the PRB0040129 workaround details. The text of the email states: "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.

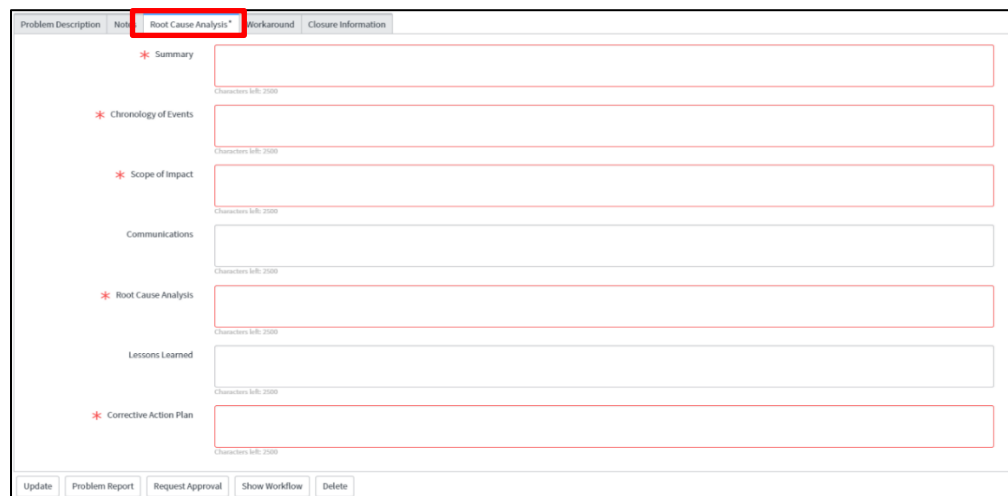
Since the incident(s) have a workaround identified, the incidents are able to proceed to be resolved without a change needing to be implemented and the problem record being closed.

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

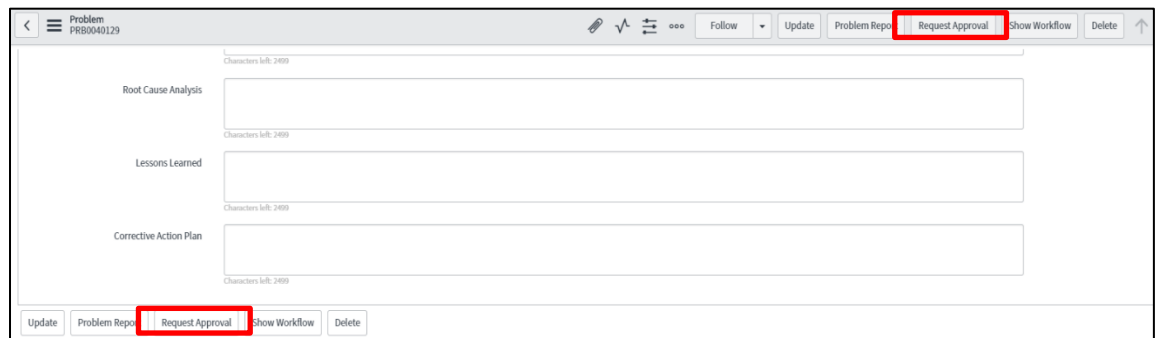
Communications: Optional field. Provide how the problem was communicated

Root Cause Analysis: Provide the root cause of the problem

Lessons Learned: Optional field. Provide the lessons learned

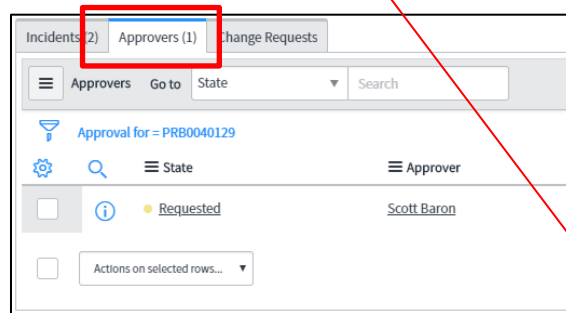
Corrective Action Plan: Provide both short-term and long-term action items

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.

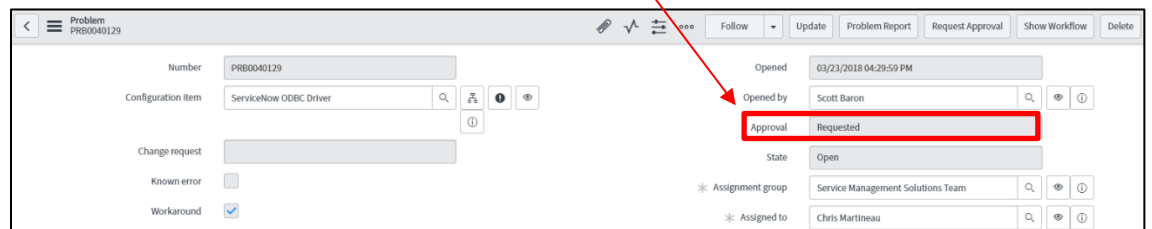


Problem Record (PRB0040129) interface showing the 'Request Approval' button highlighted in red. The interface includes fields for Root Cause Analysis, Lessons Learned, and Corrective Action Plan, each with a 2400 character limit. The bottom navigation bar includes buttons for Update, Problem Report, Request Approval, Show Workflow, and 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.

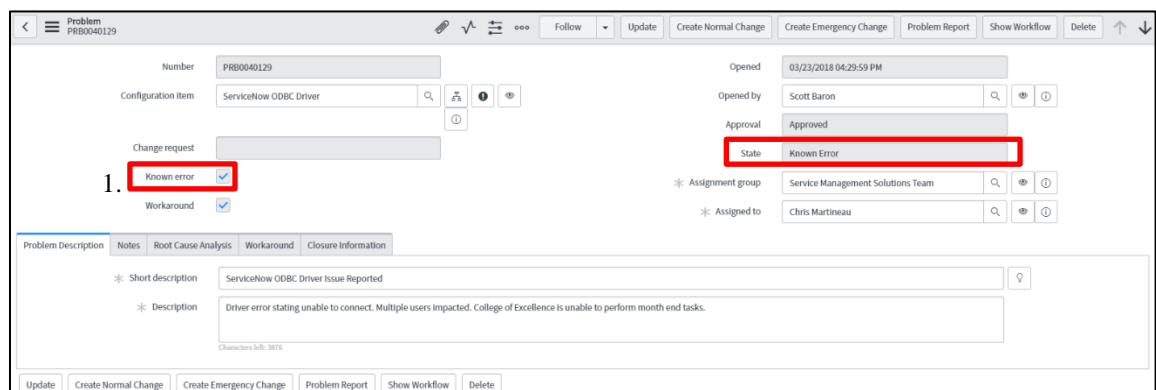


Approvers (1) tab showing the 'Requested' status for Scott Baron. The interface includes a search bar, a list of approvers, and a dropdown for actions on selected rows.



Problem Record (PRB0040129) interface showing the 'Approval Requested' status highlighted in red. The interface includes fields for Number, Configuration Item, Change request, Known error, and Workaround. The right side shows metadata such as Opened date, Opened by, State, Assignment group, and Assigned to.

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 Record (PRB0040129) interface showing the 'Known Error' checkbox selected (1.) and the 'State' changed to 'Known Error'. The interface includes fields for Number, Configuration Item, Change request, Known error, and Workaround. The right side shows metadata such as Opened date, Opened by, Approval, State, Assignment group, and Assigned to. The bottom section includes tabs for Problem Description, Notes, Root Cause Analysis, Workaround, and Closure Information.

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.

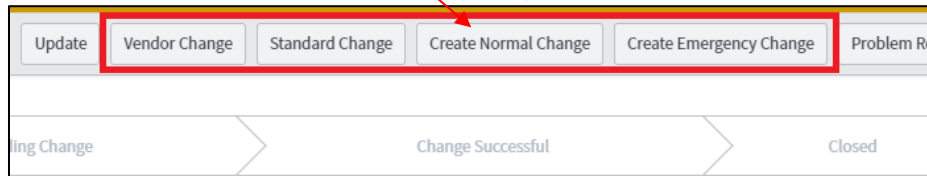
The known error raised will allow the UCF IT Service Desk agents to be able to communicate problem status and the known error to any customer that contacts the UCF IT Service Desk with the same related issue.

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:

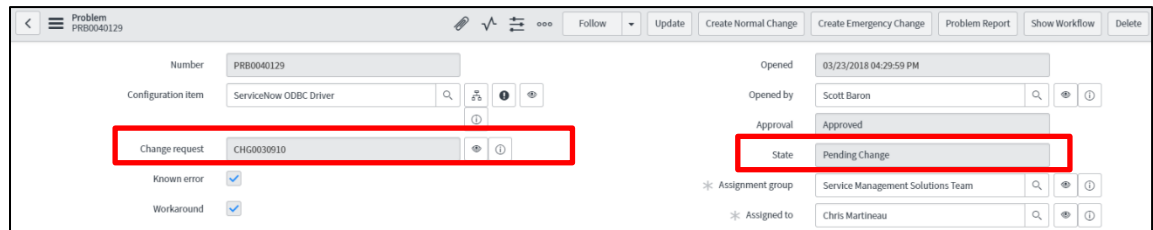
Incident/Request Management – This process is designed to manage and assist in restoring or providing service to customers as quickly as possible. The ability to prioritize incidents (something broken, not working or needs repair) according to business impact and urgency allows staff to focus efforts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

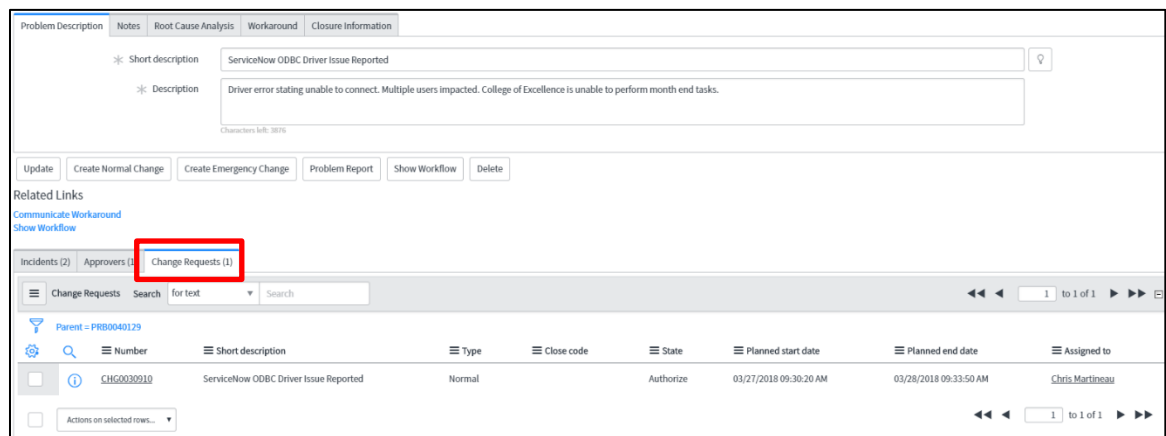
Opened by: Scott Baron

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)

IncidentsEditSearchfor textSearch

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?”)

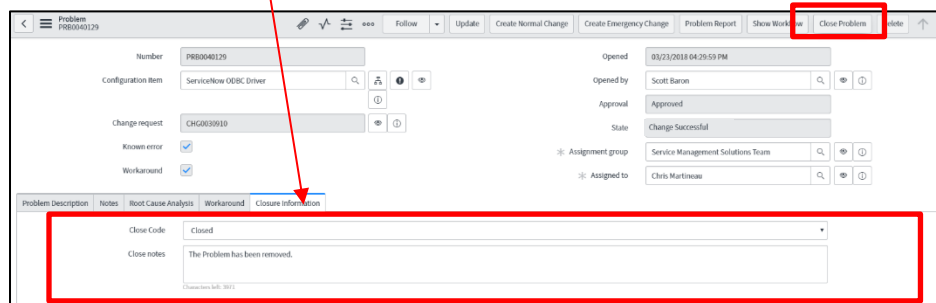
9. After the change record is closed with the applicable Close code (Successful, Successful with issues or Unsuccessful with the checkbox selected “Was this change successfully implemented outside of the planned change window?”) or a Vendor/Standard Change was implemented/selected, the problem record 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 'State' field is highlighted with a red box and contains the value 'Closed'. Other fields include 'Number' (PRB0040129), 'Configuration item' (ServiceNow ODBC Driver), 'Change request' (CHG0030910), 'Known error' (checked), 'Workaround' (checked), '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).

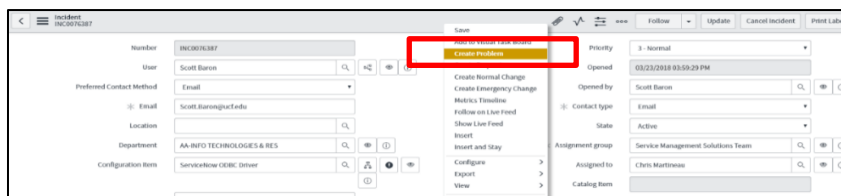
VI. STEPS TO RECORD PROBLEM RECORD – REACTIVE W/OUT WORKAROUND

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

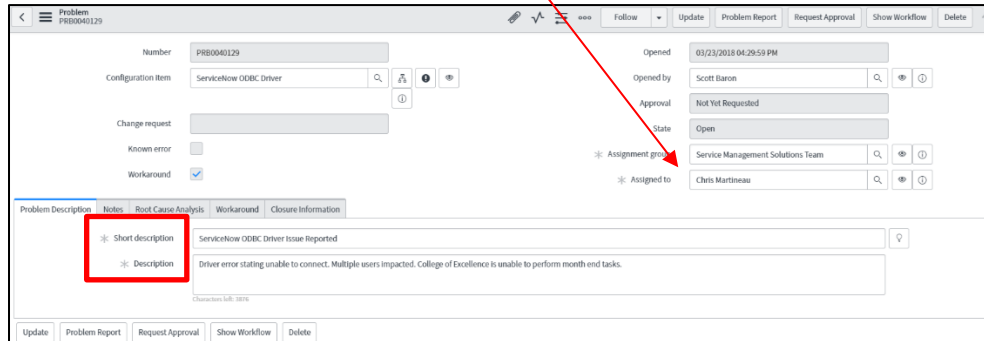


The screenshot shows the UCF IT Incident Management interface for incident record INC0076287. A right-click context menu is open over the incident header bar, and the 'Create Problem' option is highlighted. Other options in the menu include 'Create Normal Change', 'Create Emergency Change', 'Metrics Timeline', 'Follow on User Feed', 'Show Log Feed', 'Insert', 'Insert and Edit', 'Configure', 'Export', and 'View'. The incident details on the left include 'Number' (INC0076287), 'User' (Scott Baron), 'Preferred Contact Method' (Email), 'Location' (Scott Baron@ucf.edu), 'Department' (AA-INFO TECHNOLOGIES & RES), and 'Configuration item' (ServiceNow ODBC Driver). The right panel shows '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: ☒

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

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.

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)ApproversChange Requests

Incidents

Edit...

Search for text

Search

Problem - PRB0040129

NumberUserShort descriptionCategoryPriorityStateAssignment groupAssigned toResolvedClosedChange Request

INC0076388

Scott Baron

ServiceNow ODBC Driver Issue

Software

3 - Normal

Awaiting Problem

Service Management Solutions Team

Chris Martineau

(empty)

(empty)

INC0076387

Scott Baron

ServiceNow ODBC Driver Issue Reported

Software

3 - Normal

Awaiting Problem

Service Management Solutions Team

Chris Martineau

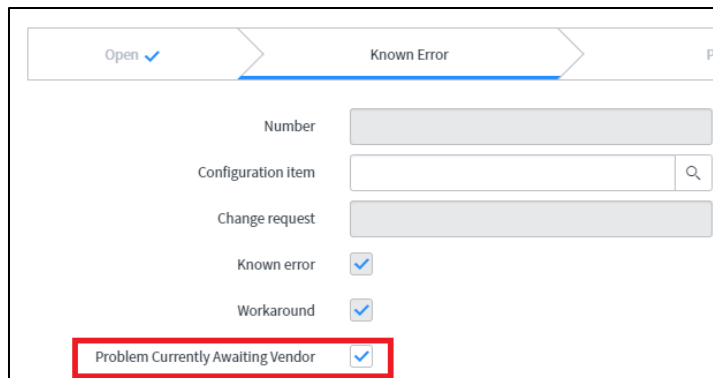
(empty)

(empty)

Actions on selected rows...

1 to 2 of 2

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: ☒

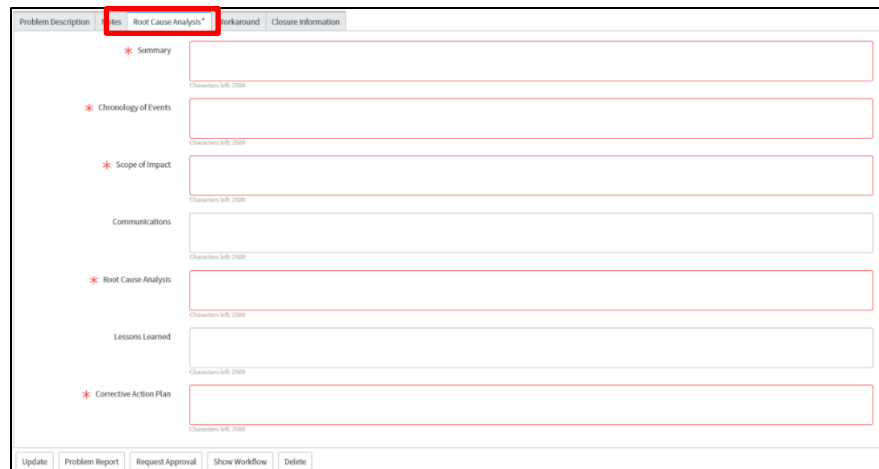
Problem Currently Awaiting Vendor: ☒

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

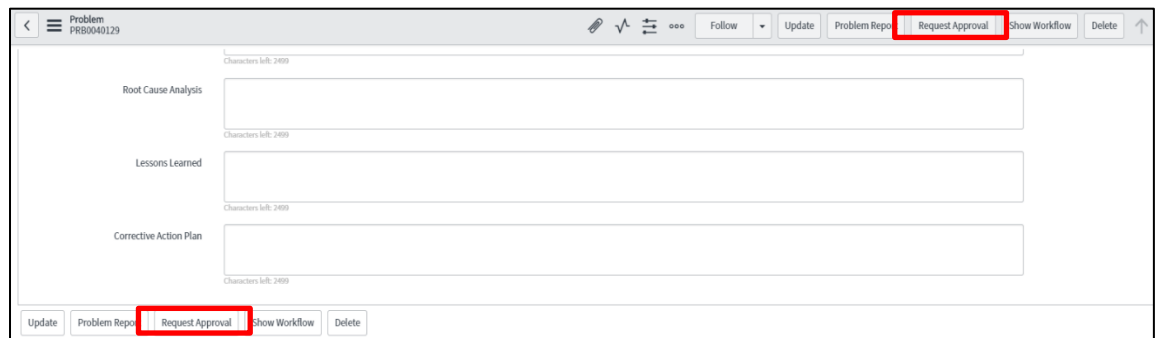
Communications: Optional field. Provide how the problem was communicated

Root Cause Analysis: Provide the root cause of the problem

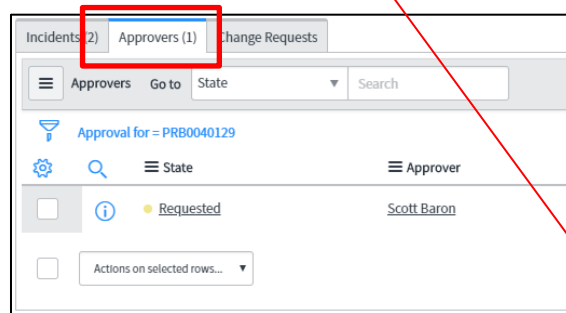
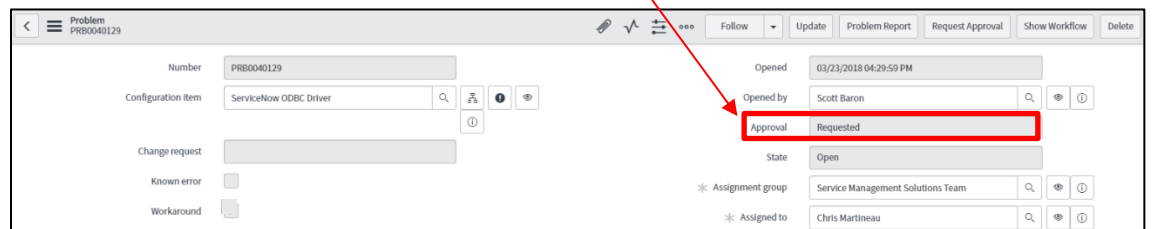
Lessons Learned: Optional field. Provide the lessons learned

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.



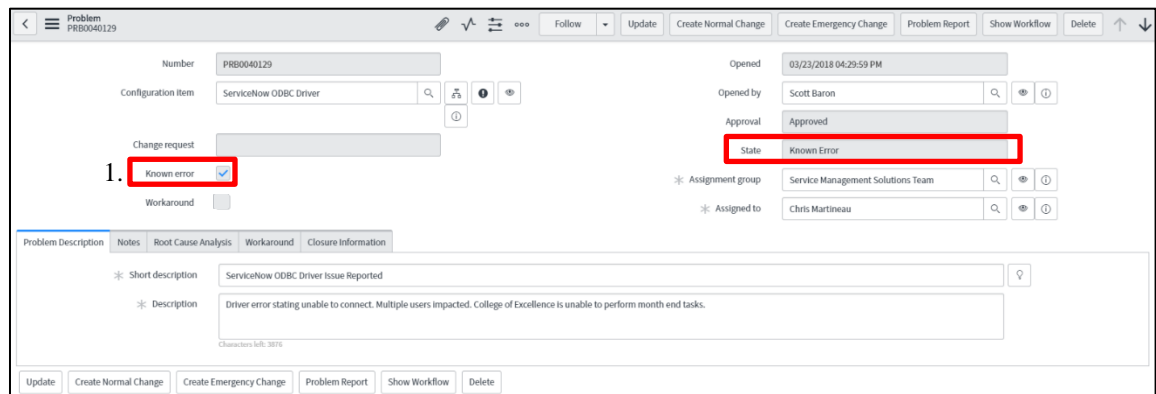
The Approvers section/tab located on the problem record will indicate there is an Approval Requested. The Approval field in the top section of the problem record will also indicate the Approval has been Requested/Rejected.

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 Service Desk with the same related issue.

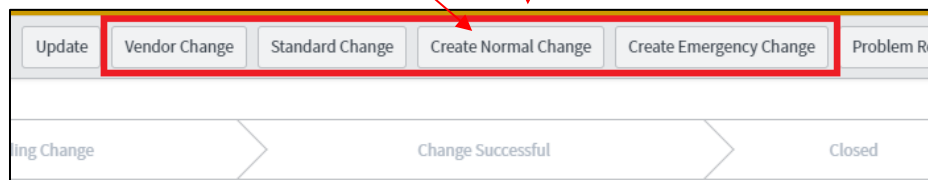


6. Next, to fix the underlying issue, a change is justified to be implemented in this scenario.

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 #8.

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](#)

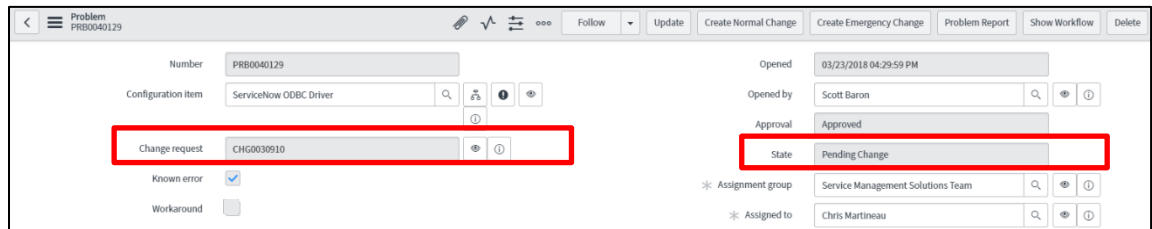
[UCF IT Change Management Change Record Procedure](#)

[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

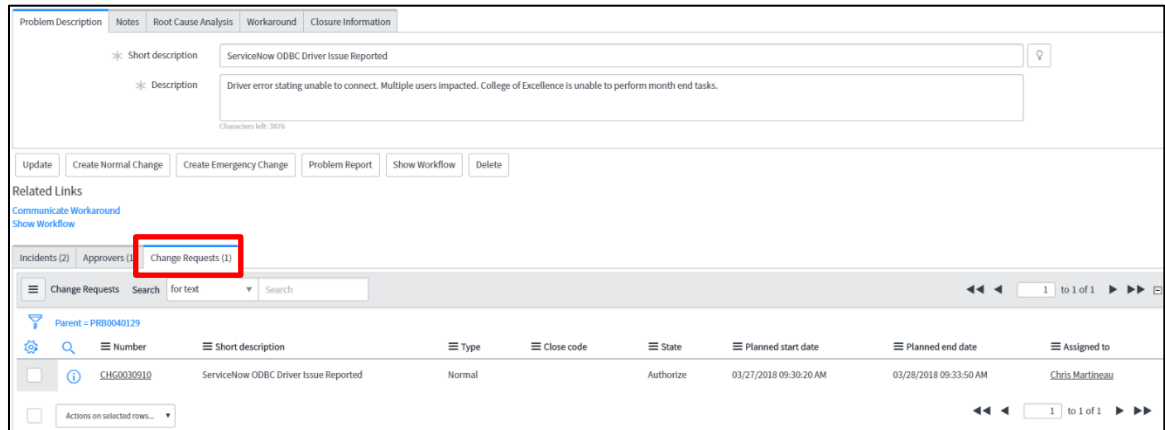
Opened by: Scott Baron

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 (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

Character Limit: 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

Character Limit: 4000

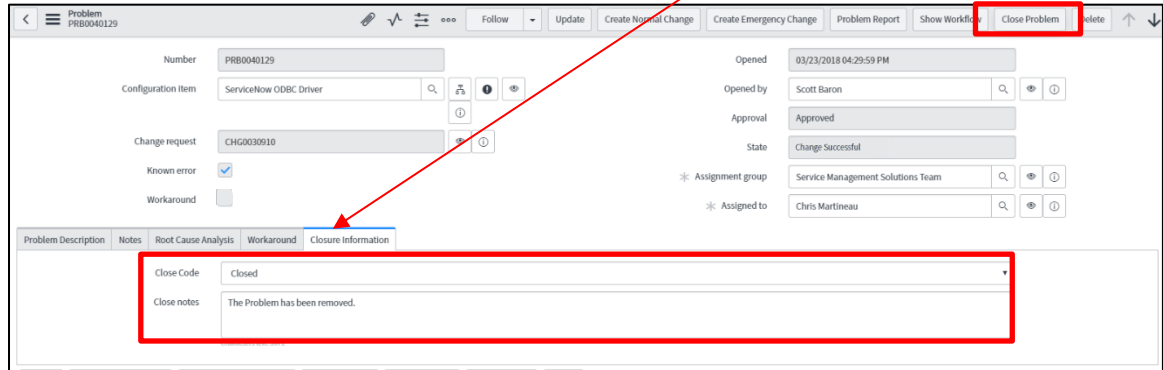
Save | Update | Vendor Change | Standard Change | Create Normal Change | Create Emergency Change | Problem Report | Show Workflow | Delete

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

VII. STEPS TO RECORD PROBLEM RECORD – PROACTIVE

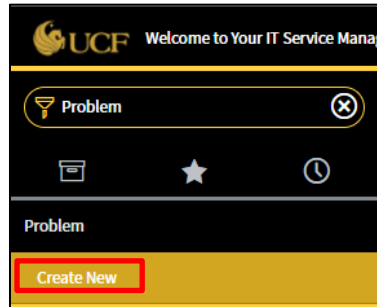
Identifying problems based on periodic scheduled reviews and analyses of closed incident patterns is referred to as proactive Problem Management. A problem record can be created as a standalone record with or without relating incident records.

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

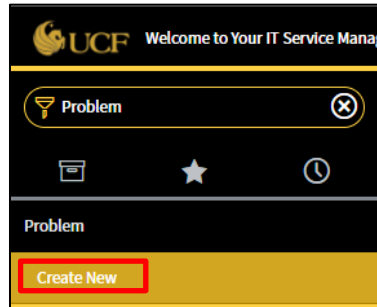
There may be occasions when the UCF IT Problem Management process cannot be followed in its entirety/order due to Emergency changes that must be introduced as soon as possible to restore services. If an Emergency change is not implemented as soon as possible, the identified issue could create significant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

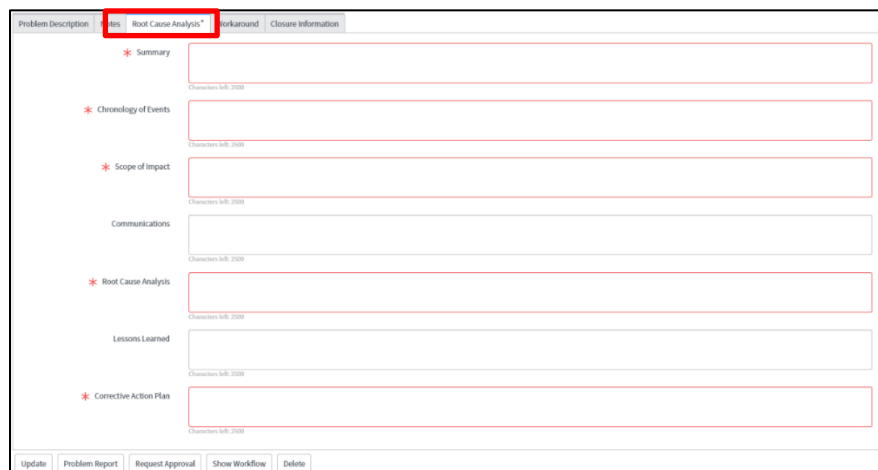
There is one way to create a retro problem record:

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

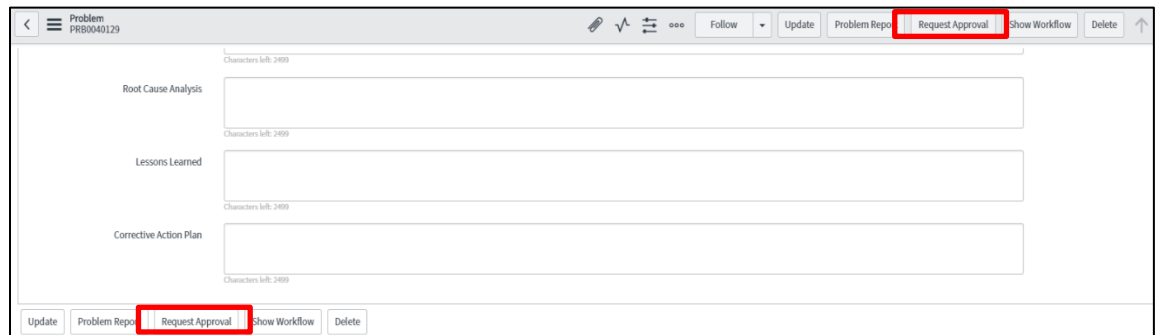
Communications: Optional field. Provide how the problem was communicated

Root Cause Analysis: Provide the root cause of the problem

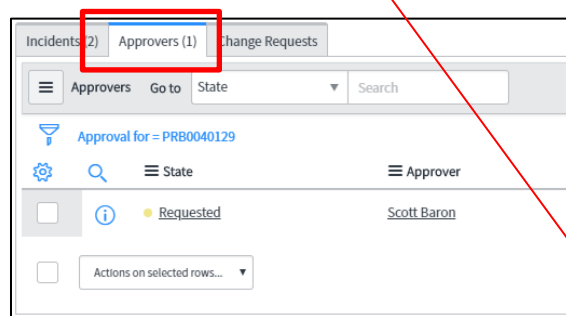
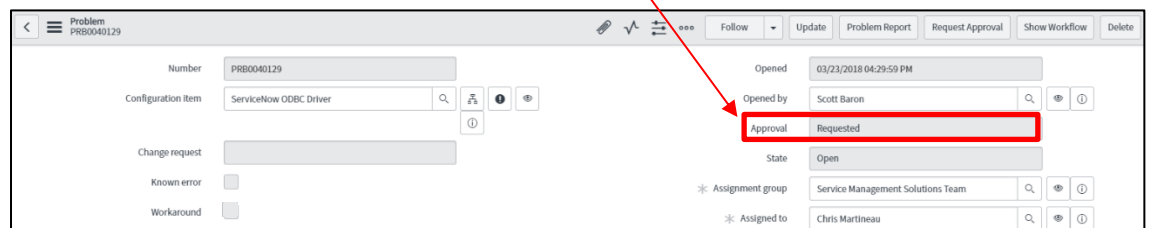
Lessons Learned: Optional field. Provide the lessons learned

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.

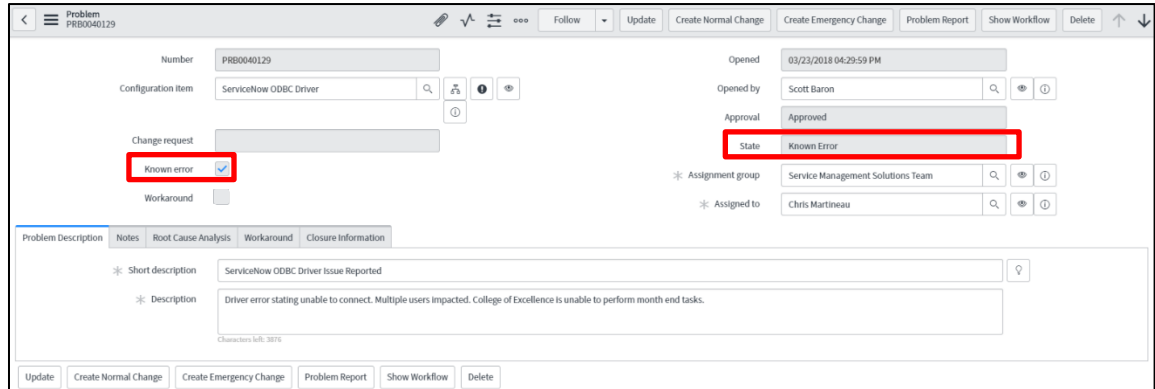


The Approvers section/tab located on the problem record will indicate there is an Approval Requested. The Approval field in the top section of the problem record will also indicate the Approval has been Requested/Rejected.

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.

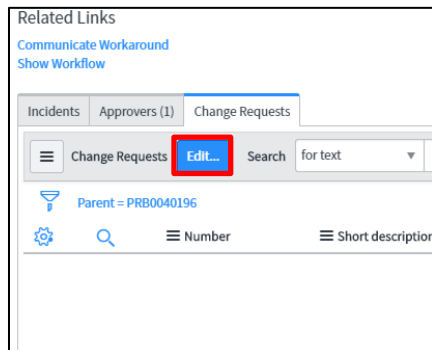
NOTE: If the Problem Manager rejects the RCA, the Problem Owner should make the necessary updates per the Problem Manager's rejection comments and resubmit for approval by selecting Request Approval again.



The screenshot shows the Problem Manager interface for problem PRB0040129. The 'Known error' checkbox is checked, and the 'State' dropdown is set to 'Known Error'. The 'Configuration item' is 'ServiceNow ODBC Driver'. The 'Opened' date is 03/23/2018 04:29:59 PM. The 'Opened by' is Scott Baron. The 'Approval' status is 'Approved'. The 'Assignment group' is 'Service Management Solutions Team' and the 'Assigned to' is Chris Martineau. The 'Problem Description' tab is active, showing a 'Short description' of 'ServiceNow ODBC Driver Issue Reported' and a 'Description' of 'Driver error stating unable to connect. Multiple users impacted. College of Excellence is unable to perform month end tasks.'

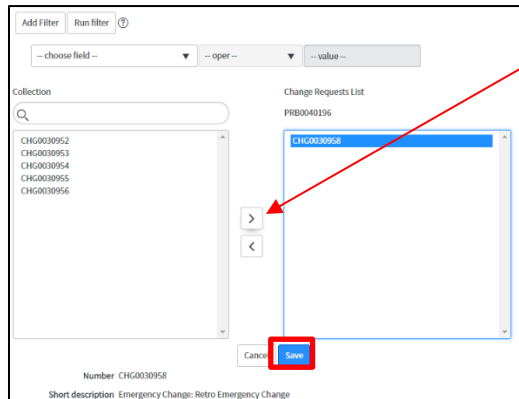
- Following the Problem Manager approving the RCA, the Emergency change record is required to be related to the retro problem record

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



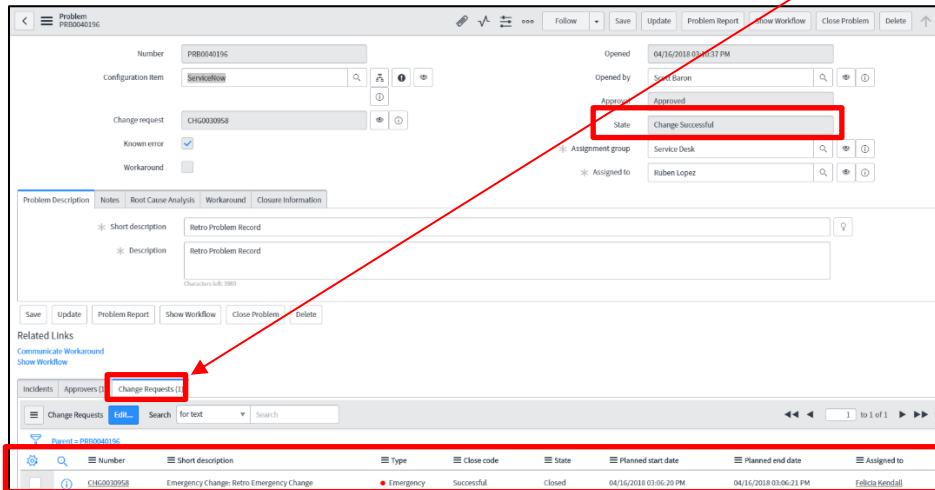
The screenshot shows the 'Related Links' section in the Problem Manager interface. The 'Change Requests' tab is selected, and the 'Edit...' button is highlighted. The 'Parent' is PRB0040196. The 'Number' and 'Short description' fields are visible.

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



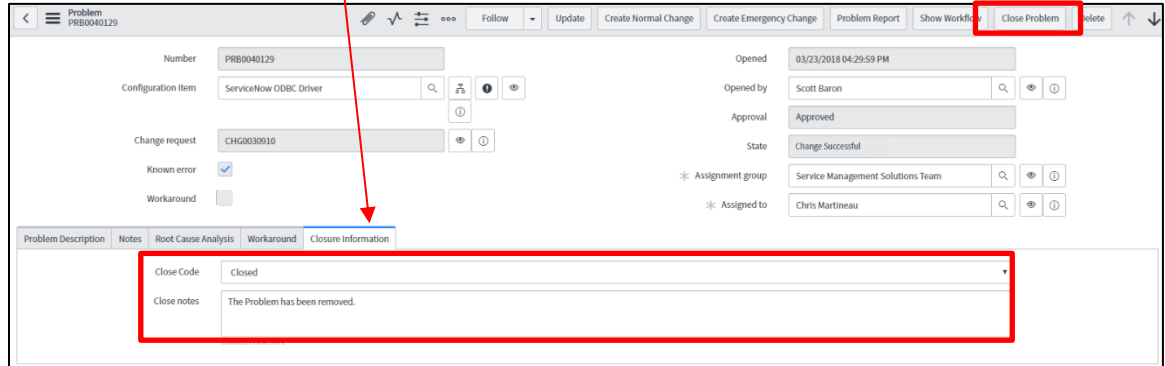
Number: CHG0030958
Short description: Emergency Change: Retro Emergency Change

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”



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 section. 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.'

Problem	PRB0040129
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

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

Close Code	Closed
Close notes	The Problem has been removed.

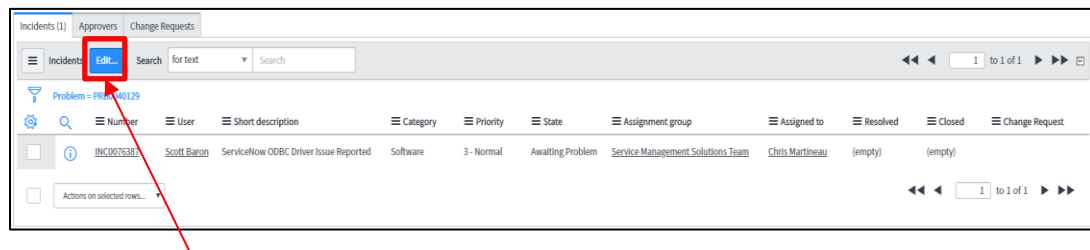
IX. APPENDIX

A. RELATING ACTIVE (OPENED) INCIDENTS TO PROBLEM RECORDS

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

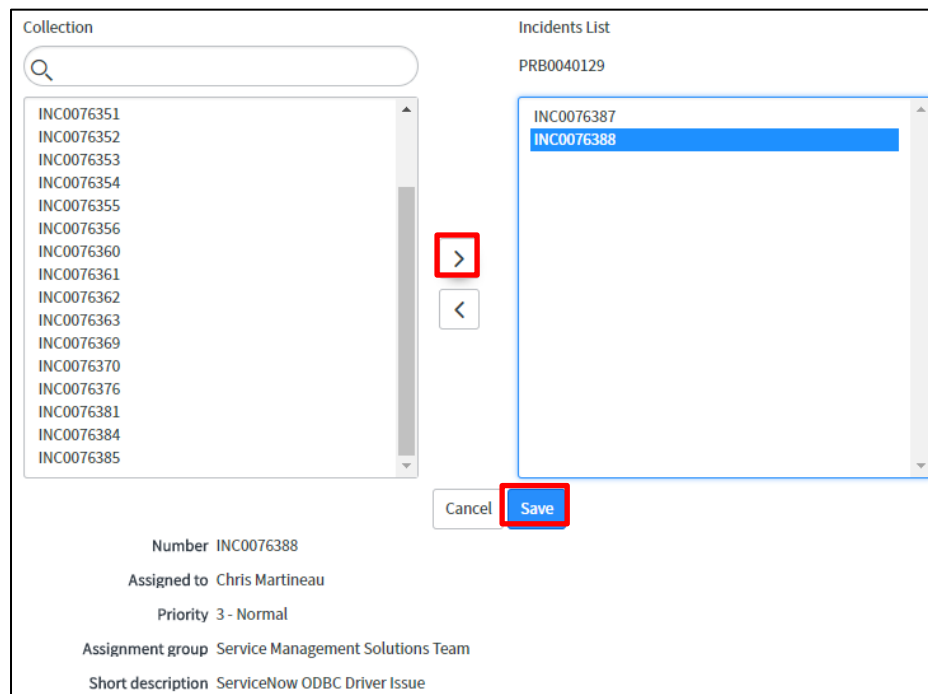
i. From the Problem Record

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



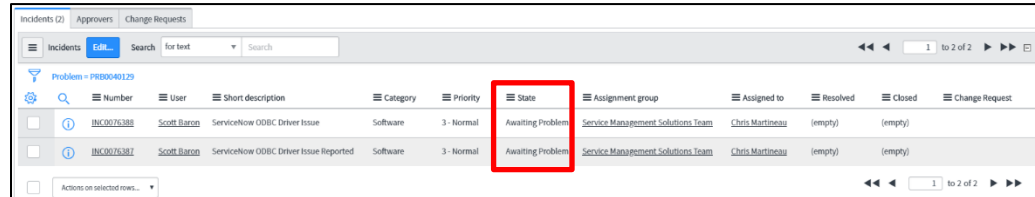
Click on Edit

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.

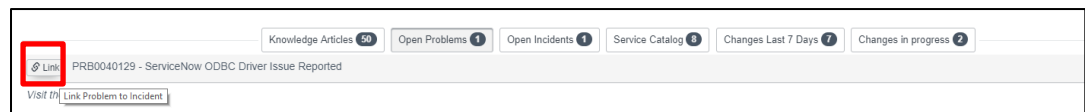


Incidents (2)	Approvers	Change Requests
Incidents	Edit	Search for text
Problem - PRB0040129		
Number	User	Short description
INC0076388	Scott Barron	ServiceNow ODBC Driver Issue
INC0076387	Scott Barron	ServiceNow ODBC Driver Issue Reported
Category	Priority	State
Software	3 - Normal	Awaiting Problem
Software	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 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.

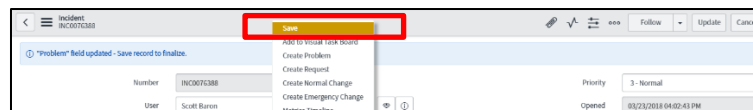


Knowledge Articles	Open Problems	Open Incidents	Service Catalog	Changes Last 7 Days	Changes in progress
50	1	1	1	7	2

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



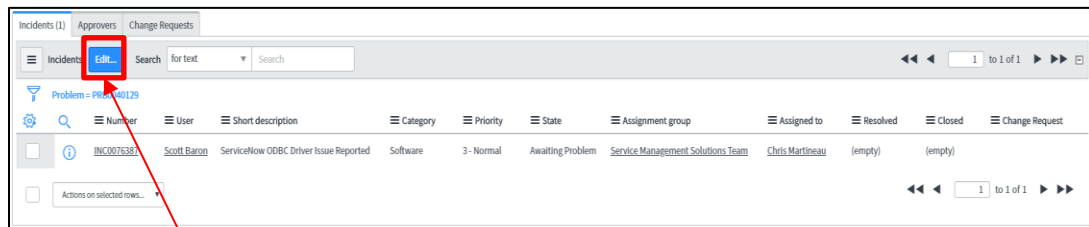
Incident	INC0076388	Save	Follow	Update	Cancel
Add to your save items					
Create Problem					
Create Request					
Create Normal Change					
Create Emergency Change					
Metrics Timeline					
Number	INC0076388	Priority	3 - Normal	Opened	8/23/2018 04:00:43 PM
User	Scott Barron				

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

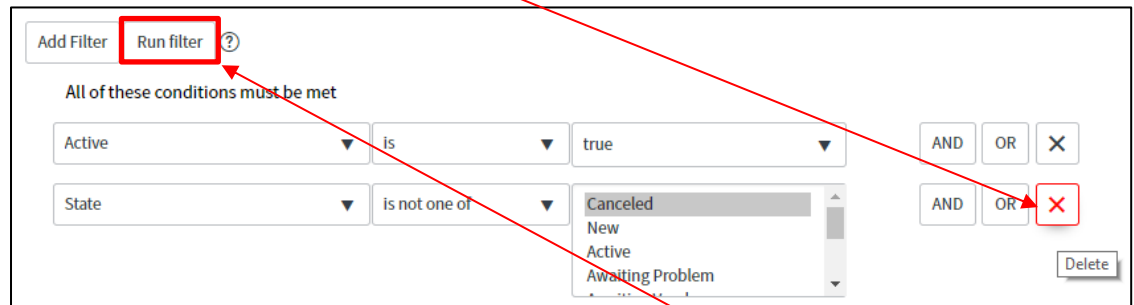
To relate applicable incidents to the problem record. Go to the Incidents section/tab



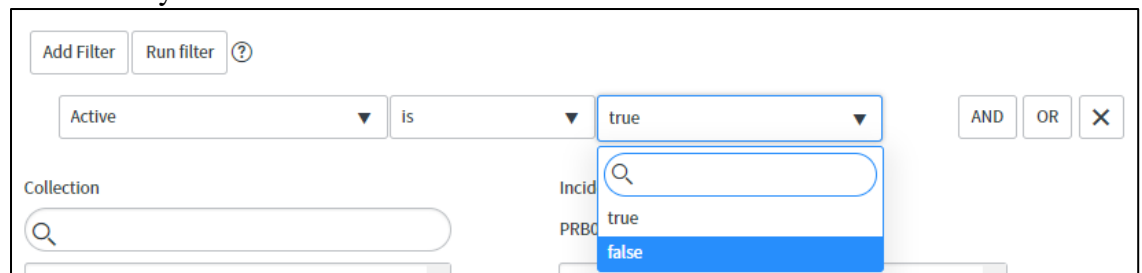
Click on Edit

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

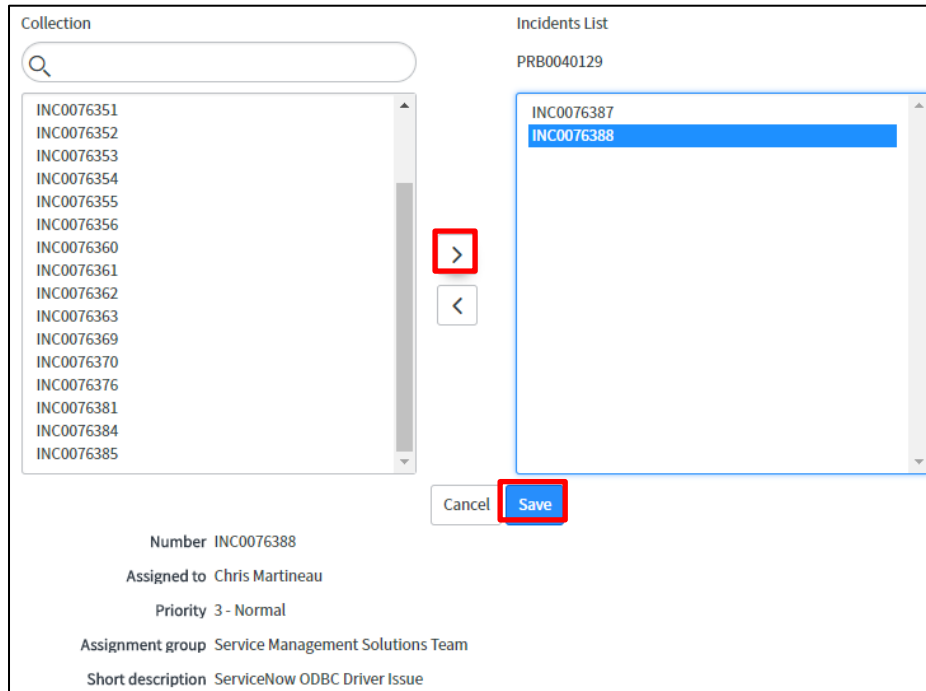
Select the “X” (Delete) from the State condition row to remove the condition.



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

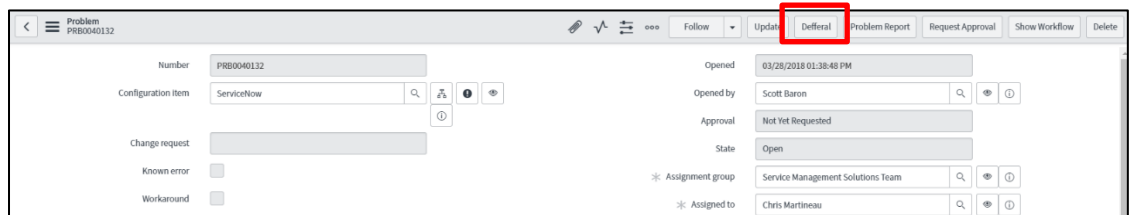
Number INC0076388
Assigned to Chris Martineau
Priority 3 - Normal
Assignment group Service Management Solutions Team
Short description ServiceNow ODBC Driver Issue

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

Problem Description	Notes	Root Cause Analysis	Workaround	Closure Information *
		<div>* Close Code: Deferred</div> <div>* Close notes: <input type="text"/></div> <div>Characters left: 4000</div>		

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.

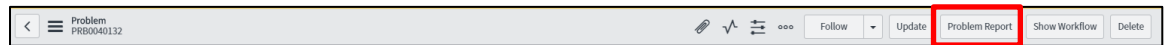
Thank you.

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.

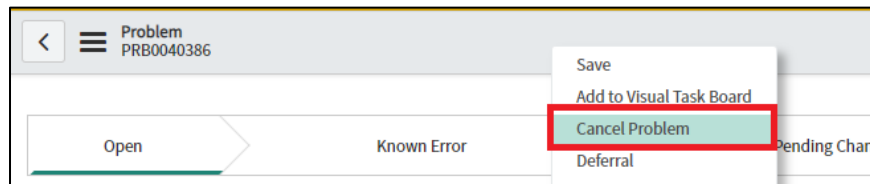


By clicking this button, ServiceNow generates a PDF, which is downloaded to the clients browsers default location.

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”.



NOTE: DO NOT CANCEL A PROBLEM RECORD THAT IS TIED TO AN ACTIVE INCIDENT IN STATUSPAGE DURING THE OUTAGE COMMUNICATION PROCESS.

F. OUTAGE COMMUNICATION (COMMUNICATION MEDIUMS)

After the problem record is created (following the steps within Sections V. or VI. of this document), the Communication tab/section of the Problem record enables communication about the underlying issue/service(s) impacted to be sent across multiple mediums.

NOTE: If the service impacted is a Statuspage service, then some communication mediums by default will be selected.

Communication mediums include:

- Statuspage
 - o Statuspage will systematically update through the process defined below
- CITC Channel in Teams
 - o Teams will systematically update through the process defined below
- 3-5117 Status Line
- Campus Wide or Mass Email Listserv Distribution
 - o For any questions on Listserv distribution groups, contact the Support Center
- Additional Users/Emails
 - o Emails to individuals or groups will be systematically sent through the process defined below
- Social Media
- Self-Service Portal
 - o The self-service portal will systematically update through the process defined below

Problem Description	Notes	Root Cause Analysis	Workaround	Communication	Closure Information
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Here are step by step instructions if a Statuspage Service:

i. **Send Initial Communication (If a Statuspage Service):**

If a problem is related to a Statuspage service (deemed a Major Incident), then the [UCF IT Outage Communication Checklist](#) should be followed in its entirety. Within the Problem record, the question “Is this a Statuspage Service?”, select Yes and services are degraded or services are unavailable.

Is this a Statuspage Service?

Post Outage Communication to CITC Channel in Teams

Update 3-5117 Status Line

No

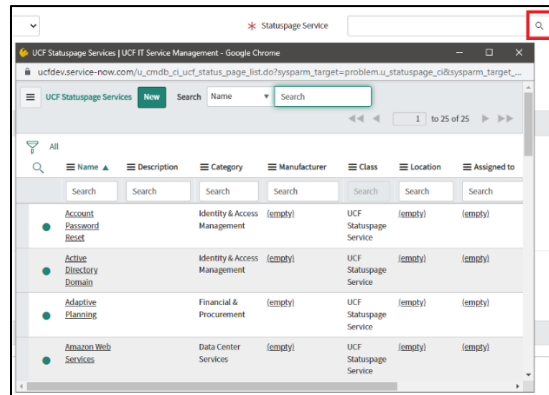
-- None --

Yes and services are degraded

Yes and services are unavailable

No

Select the Statuspage Service impacted by selecting the magnifying glass.



UCF Statuspage Services

Name	Description	Category	Manufacturer	Class	Location	Assigned to
Account Password Reset	Identity & Access Management	(empty)	UCF Statuspage Service	(empty)	(empty)	(empty)
Active Directory (Domain)	Identity & Access Management	(empty)	UCF Statuspage Service	(empty)	(empty)	(empty)
Adaptive Planning	Financial & Procurement	(empty)	UCF Statuspage Service	(empty)	(empty)	(empty)
Amazon Web Services	Data Center Services	(empty)	UCF Statuspage Service	(empty)	(empty)	(empty)

NOTE: This prompt will appear if a problem record has already been created and has an active Statuspage incident associated to it (Enterprise VPN is just an example of a Statuspage Service selected). This prompt will also appear if someone incorrectly created a Statuspage incident outside of a problem record.

Unable to Select Statuapage Service

Enterprise VPN has an active Statuspage Incident already associated to it. The current status is set to Degraded Performance.

Ok

By default (read-only), if Yes and services are unavailable is selected, the CITC Channel in Teams, Status Line and Self-Service Portal will all be updated as communication mediums.

Problem Description	Notes	Root Cause Analysis	Workaround	Communication	Closure Information
<p>Outage Communication - Immediate To-Do Items</p> <p><small>Please note: If you select a medium and just save the record, this action will not trigger any communication mediums to be sent. You must click the red Send Communication button to trigger the selected communication mediums to be sent.</small></p>					
Is this a Statuspage Service?		<input type="text" value="Yes and services are unavailable"/>		* Statuspage Service: <input type="text" value="Cisco IPT Phone System"/> Operational	
Post Outage Communication to CITC Channel in Teams		<input checked="" type="checkbox"/>			
Update 3-5117 Status Line		<input checked="" type="checkbox"/>			
<p>Outage Communication - Other Communication Mediums</p>					
Send Campus Wide or Mass Email Listserv Distribution		<input type="checkbox"/>			
Send Email Communication to Additional Users/Emails		<input type="checkbox"/>			
Update Social Media		<input type="checkbox"/>			
<p>ServiceNow Customer Portal Announcement</p>					
Post to Self-Service Portal		<input checked="" type="checkbox"/>			

By default (read-only), if Yes and services are degraded is selected, the CITC Channel in Teams and Self-Service Portal will all be updated as communication mediums.

Problem Description	Notes	Root Cause Analysis	Workaround	Communication	Closure Information
<p>Outage Communication - Immediate To-Do Items</p> <p><small>Please note: If you select a medium and just save the record, this action will not trigger any communication mediums to be sent. You must click the red Send Communication button to trigger the selected communication mediums to be sent.</small></p>					
Is this a Statuspage Service?		<input type="text" value="Yes and services are degraded"/>		* Statuspage Service: <input type="text" value="Cisco IPT Phone System"/> Operational	
Post Outage Communication to CITC Channel in Teams		<input checked="" type="checkbox"/>			
Update 3-5117 Status Line		<input type="checkbox"/>			
<p>Outage Communication - Other Communication Mediums</p>					
Send Campus Wide or Mass Email Listserv Distribution		<input type="checkbox"/>			
Send Email Communication to Additional Users/Emails		<input type="checkbox"/>			
Update Social Media		<input type="checkbox"/>			
<p>ServiceNow Customer Portal Announcement</p>					
Post to Self-Service Portal		<input checked="" type="checkbox"/>			

Other communication mediums (optional) that can be chosen include:

- Status Line (if not “services are unavailable”)
- Send Campus Wide or Mass Email Listserv Distribution
- Send Email Communication to Additional Users/Emails
- Update Social Media

After all the mediums are selected, the Outage Communication Details section needs to be filled out. For the initial communication to be sent, the only required field to be filled out is “What are we doing about it?”. By default, the text of “We are currently investigating this issue.” is populated. The other fields can be filled out now or wait until communication is updated.

Outage Communication Details	
What is happening?	<p>Explain the situation in terms students, faculty and staff can easily understand.</p> <p>2500 characters remaining of 2500 characters</p>
Who is impacted?	<p>Note here who is impacted - include relevant scope, buildings, user base, staff roles, etc.</p> <p>2500 characters remaining of 2500 characters</p>
* What are we doing about it?	<p>We are currently investigating this issue.</p> <p>2500 characters remaining of 2500 characters</p>
What happens next?	<p>Note here when we plan on providing the next update, estimated time for resolution or update, etc.</p> <p>2500 characters remaining of 2500 characters</p>
What do I need to do?	<p>Note here if there are specific actions that need to be taken by users. Keep the 'Stay Updated' and 'Contact us' text for every communication.</p> <p>2500 characters remaining of 2500 characters</p>

Select the red button “Send Initial Communication”.

Problem PRB0040793	
Update Social Media <input checked="" type="checkbox"/>	<p>ServiceNow Customer Portal Announcement</p> <p>Post to Self-Service Portal <input checked="" type="checkbox"/></p>

A prompt will pop up to confirm that you want to send the initial communication to the mediums selected.

Please Confirm
<p>Please confirm that you want to send the initial communication to the following mediums.</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Statuspage Service <input checked="" type="checkbox"/> CITC Teams Channel <input checked="" type="checkbox"/> 3-5117 Status Line <input checked="" type="checkbox"/> Campus/Mass Listserv Distribution <input checked="" type="checkbox"/> Additional Email Recipients <input checked="" type="checkbox"/> Social Media <input checked="" type="checkbox"/> ServiceNow Self-Service Portal <p><input type="button" value="Cancel"/> <input type="button" value="Ok"/></p> <p><small>ACTION REQUIRED: The Communications Lead is required to contact Operations (407-823-2908) to inform them that outage communication is required or may be required soon.</small></p>

ii. Send Communication Update (If a Statuspage Service):

NOTE: After the initial communication is sent, any mediums that were selected will now be read-only to ensure the mediums are updated to resolution.

The Outage Communication Details section should be completed/updated at this time.

Outage Communication Details

Issue resolved ☐

* What is happening?

* Who is impacted?

* What are we doing about it?

* What happens next?

* What do I need to do?

Explain the situation in terms students, faculty and staff can easily understand.

2500 characters remaining of 2500 characters

Note here who is impacted - include relevant scope, buildings, user base, staff roles, etc.

2500 characters remaining of 2500 characters

We are currently investigating this issue.

2458 characters remaining of 2500 characters

Note here when we plan on providing the next update, estimated time for resolution or update, etc.

2500 characters remaining of 2500 characters

Note here if there are specific actions that need to be taken by users. Keep the 'Stay Updated' and 'Contact us' text for every communication.

2500 characters remaining of 2500 characters

After completing or updating the Outage Communication Details section, click the Send Communication Update button.

Follow

Save

Update

Deferral

Problem Report

Request Approval

Show Workflow

Send Communication Update

A prompt will pop up to confirm the mediums to send the update to.

Please Confirm

Please select the medium(s) you would like to send the communication update to. If the checkbox is greyed out and you would like to send to that medium, click Cancel and select the medium from the form.

- ☒ Statuspage Service
- ☒ CITC Teams Channel
- ☒ 3-5117 Status Line
- ☒ Campus/Mass Listserv Distribution
- ☒ Additional Email Recipients
- ☒ Social Media
- ☒ ServiceNow Self-Service Portal

Cancel

Select All

Ok

iii. Send Resolved Communication (If a Statuspage Service):

After 30 minutes of verifying services are fully restored, toggle the “Issue resolved” checkbox. Complete the “Brief Explanation for Customer” and “Date/Time resolved” fields.

37

Outage Communication Details

Issue resolved ☒





* Date/Time resolved


* Brief Explanation for Customer

Provide brief explanation of what happened.

2500 characters remaining of 2500 characters

Click the “Send Resolved Communication” button.



Follow 

Save

Update

Deferral

Problem Report

Request Approval

Show Workflow

Send Resolved Communication

The listed mediums will receive the resolved communication.

Please Confirm

The below mediums will receive the resolved communication.

☒ Statuspage Service

☒ CITC Teams Channel

☒ 3-5117 Status Line

☒ Campus/Mass Listserv Distribution

☒ Additional Email Recipients

☒ Social Media

☒ ServiceNow Self-Service Portal

Cancel

Ok

Here are step by step instructions if not a Statuspage Service:

i. Send Initial Communication (If not a Statuspage Service):

If a problem is not related to a Statuspage service; Within the Problem record, the question “Is this a Statuspage Service?”, select No.

A prompt will popup. Complete the Short Description.

Please Confirm

To ensure consistent communication, please identify the exact and concise service name that is unavailable or degraded. This will be used as your new short description on the problem record as well as reflected in the communication medium(s) identified.

Cancel Ok

Choose mediums. One or many.

Outage Communication - Immediate To-Do Items

Please note: If you select a medium and just save the record, this action will not trigger any communication mediums to be sent. You must click the red Send Communication button to trigger the selected communication mediums to be sent.

Is this a Statuspage Service?
No

Post Outage Communication to CITC Channel in Teams
☐

Update 3-5117 Status Line
☐

Outage Communication - Other Communication Mediums

Send Campus Wide or Mass Email Listserv Distribution
☐

Send Email Communication to Additional Users/Emails
☐

Update Social Media
☐

ServiceNow Customer Portal Announcement

Post to Self-Service Portal
☐

After all the mediums are selected, the Outage Communication Details section needs to be filled out. For the initial communication to be sent, the only required field to be filled out is “What are we doing about it?”. The other fields can be filled out now or wait until communication is updated.

Outage Communication Details	
What is happening?	<p>Explain the situation in terms students, faculty and staff can easily understand.</p> <p>2500 characters remaining of 2500 characters</p>
Who is impacted?	<p>Note here who is impacted - include relevant scope, buildings, user base, staff roles, etc.</p> <p>2500 characters remaining of 2500 characters</p>
* What are we doing about it?	<p>Note what we are actively doing to address the situation - investigating, identified, addressed the issue, monitoring, working with a cloud vendor on resolution, etc.</p> <p>2500 characters remaining of 2500 characters</p>
What happens next?	<p>Note here when we plan on providing the next update, estimated time for resolution or update, etc.</p> <p>2500 characters remaining of 2500 characters</p>
What do I need to do?	<p>Note here if there are specific actions that need to be taken by users. Keep the 'Stay Updated' and 'Contact us' text for every communication.</p> <p>2500 characters remaining of 2500 characters</p>

Select the red button “Send Initial Communication”.

Problem PRB0040793	
Update Social Media	<input checked="" type="checkbox"/>
ServiceNow Customer Portal Announcement	
Post to Self-Service Portal	<input checked="" type="checkbox"/>

Follow Save Update Deferral Problem Report Request Approval Show Workflow **Send Initial Communication**

A prompt will pop up to confirm that you want to send the initial communication to the mediums selected.

Please Confirm

Please confirm that you want to send the initial communication to the following mediums.

☒ ServiceNow Self-Service Portal

Cancel **Ok**

ACTION REQUIRED: The Communications Lead is required to contact Operations (407-823-2908) to inform them that outage communication is required or may be required soon.

ii. Send Communication Update (If not a Statuspage Service):

NOTE: After the initial communication is sent, any mediums that were selected will now be read-only to ensure the mediums are updated to resolution.

The Outage Communication Details section should be completed/updated at this time.

Outage Communication Details

☐ Issue resolved

* What is happening?

Explain the situation in terms students, faculty and staff can easily understand.

2500 characters remaining of 2500 characters

* Who is impacted?

Note here who is impacted - Include relevant scope, buildings, user base, staff roles, etc.

2500 characters remaining of 2500 characters

* What are we doing about it?

We are currently investigating this issue.

2468 characters remaining of 2500 characters

* What happens next?

Note here when we plan on providing the next update, estimated time for resolution or update, etc.

2500 characters remaining of 2500 characters

* What do I need to do?

Note here if there are specific actions that need to be taken by users. Keep the 'Stay Updated' and 'Contact us' text for every communication.

2500 characters remaining of 2500 characters

After completing or updating the Outage Communication Details section, click the Send Communication Update button.

Follow

▼

Save

Update

Deferral

Problem Report

Request Approval

Show Workflow

Send Communication Update

A prompt will pop up to confirm the mediums to send the update to.

Please Confirm

Please select the medium(s) you would like to send the communication update to. If the checkbox is greyed out and you would like to send to that medium, click Cancel and select the medium from the form.

- ☒ Statuspage Service
- ☒ CITC Teams Channel
- ☒ 3-5117 Status Line
- ☒ Campus/Mass Listserv Distribution
- ☒ Additional Email Recipients
- ☒ Social Media
- ☒ ServiceNow Self-Service Portal

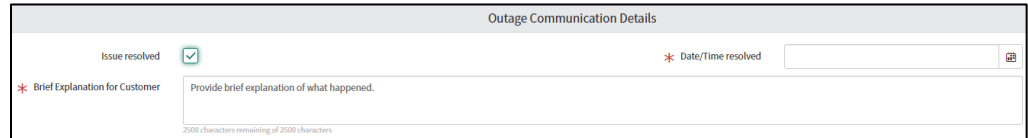
Cancel

Select All

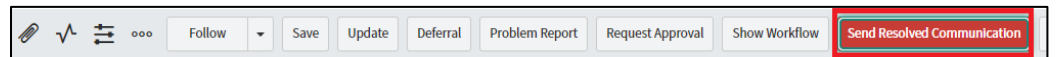
Ok

iii. **Send Resolved Communication (If not a Statuspage Service):**

After 30 minutes of verifying services are fully restored, toggle the “Issue resolved” checkbox. Complete the “Brief Explanation for Customer” and “Date/Time resolved” fields.



Click the “Send Resolved Communication” button.



The listed mediums will receive the resolved communication

