CalSAWS | Utilizing ServiceNow and Jira for CalSAWS Ticketing Process

Fact Sheet

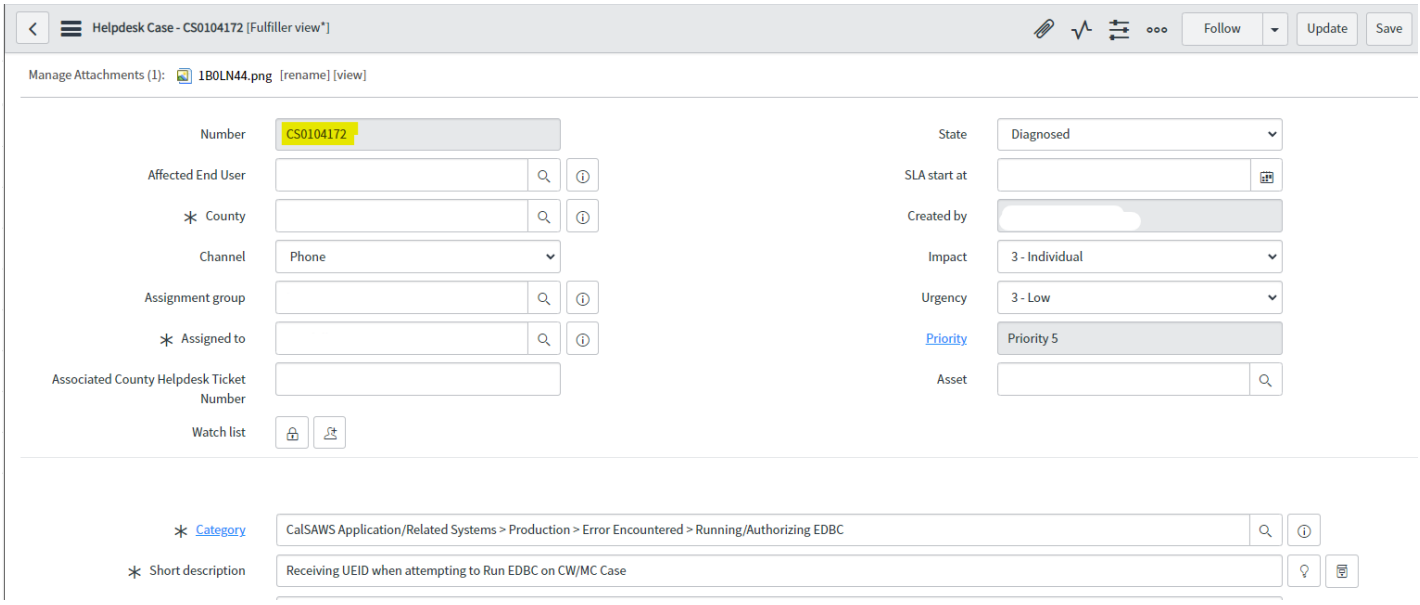
Purpose

To provide an overview of the ServiceNow ticketing process and the Jira tool to help Counties monitor ticket progression from incident to defect and Service Change Request (SCR).

Case

When a worker encounters an issue in CalSAWS and escalates the issue through the help desk a ticket is logged into ServiceNow. This ticket is known as a ***Case***. Once the issue is added in ServiceNow a *Case* is created, and the worker is given a case number, for example: CS0123456.

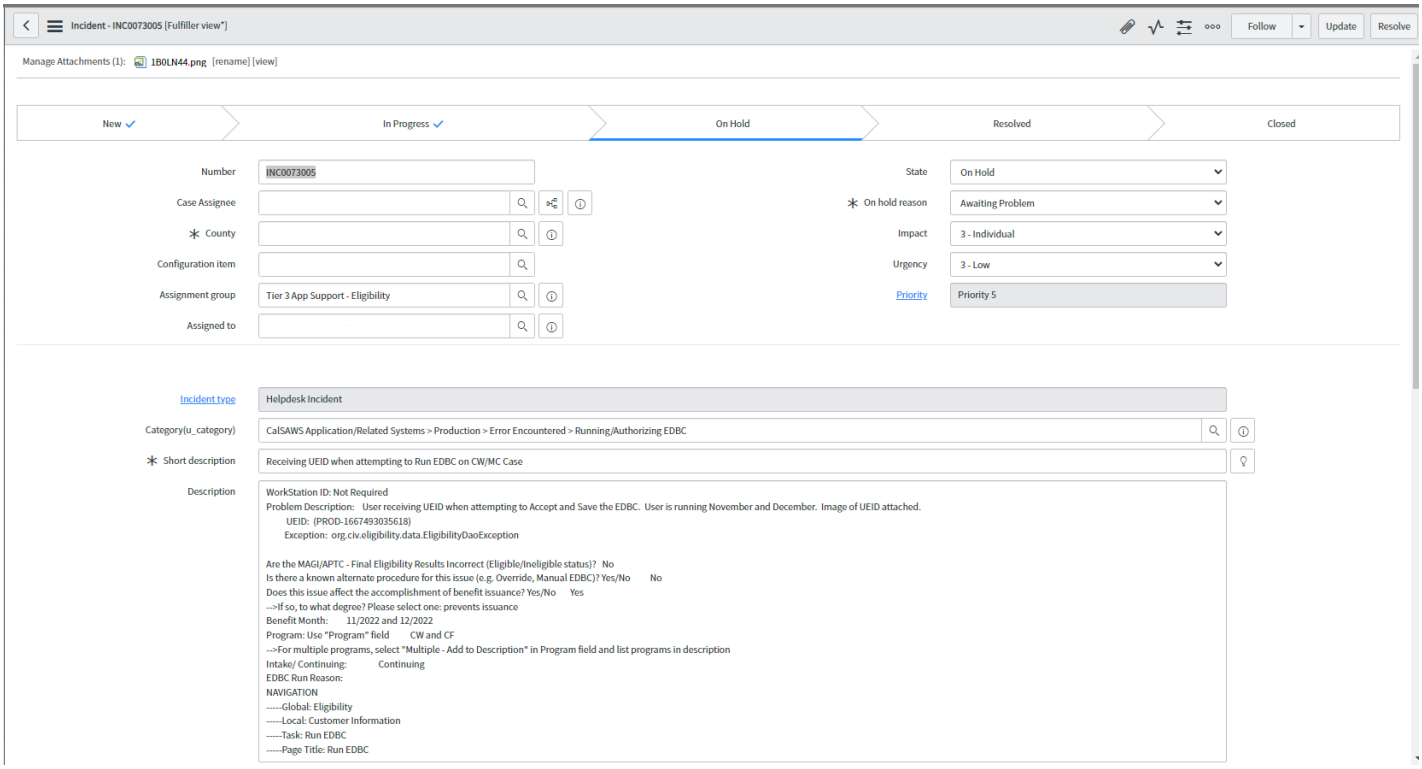
The ServiceNow screen shot below indicates the case number.



The case is researched by Level 1 staff (designated members of Virtual Support) and if a resolution is not feasible, the Case is escalated to Level 2 through an ***Incident***. The Level 2 is the CalSAWS Central Help Desk.

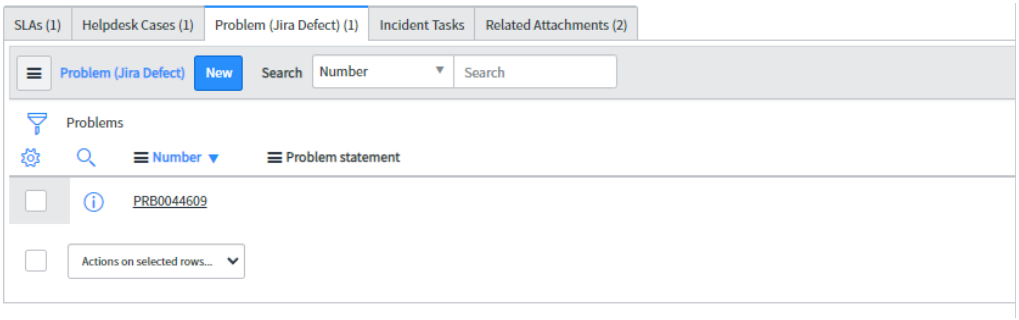
Note: Virtual Support is only available during each counties post-implementation support period. After the post implementation, counties would follow their Level 1 help desk process.

Incident



The CalSAWS Central Help Desk reviews the Incident to determine if this is a known issue in the system that is attached to a Problem or System Change Request (SCR). If there is a known Problem or an SCR, the Central Help Desk will associate the Incident to the known Problem or SCR. Associating the Incident to the Problem does not mean the issue has been resolved but that the project team can research the Problem (through more incidents and examples).

If required, CalSAWS Central Help Desk will escalate the Incident to the required Level 3 team at the CalSAWS Help Desk to review the Incident and determine if this a new Problem and if the new Problem will require an SCR. Once Level 3 makes a determination to create a Problem with an SCR or Database Change Request (DCR) and/or provide a resolution for the End User. The Incident and the Case are then put in a Resolved Status and an email will be sent out to the person who was originally assigned the ServiceNow Case.



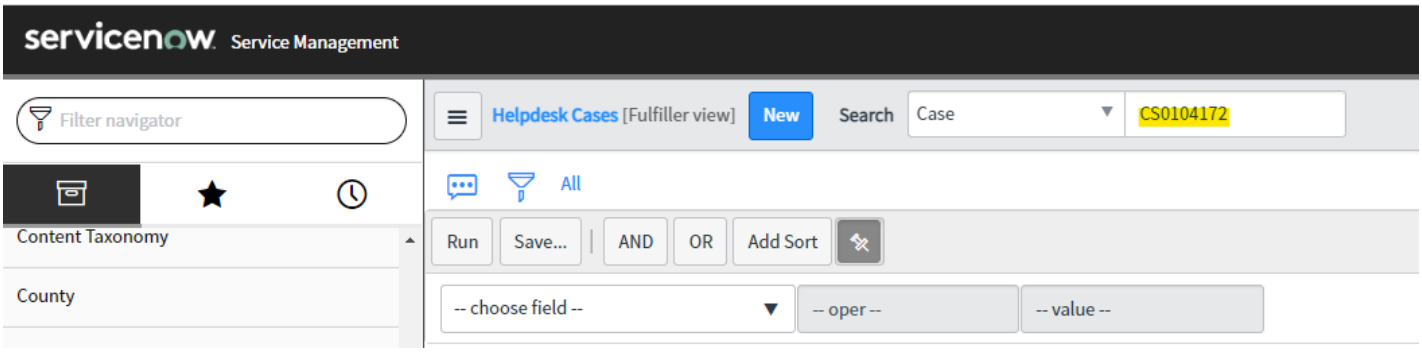
My ticket has been associated to an SCR, now what?

Once an SCR has been created, the CalSAWS team will determine if the Problem is a system defect. The SCR will then go through the CalSAWS project prioritization process and be updated with a tentative release date, if applicable; known as a Fix in Jira.

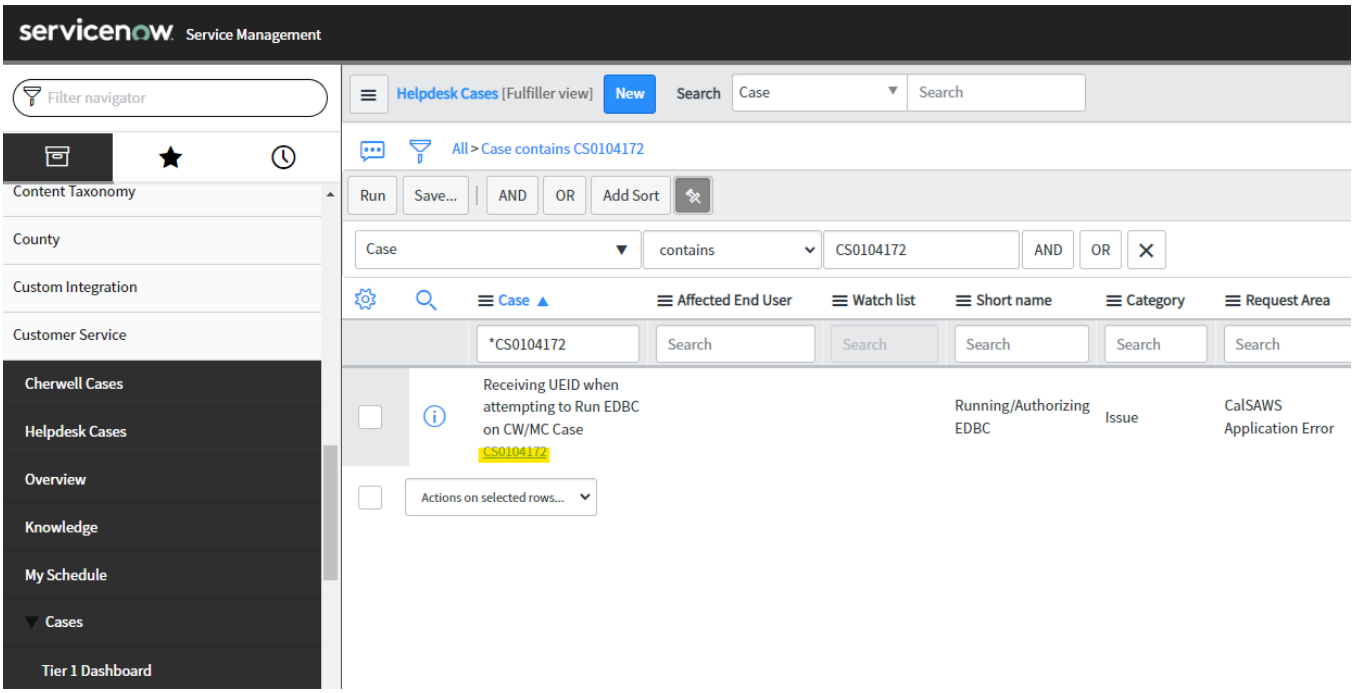
Note: Designated County Staff will have access to view the SCR through the Jira tool.

How do I know what the Status of my ticket is?

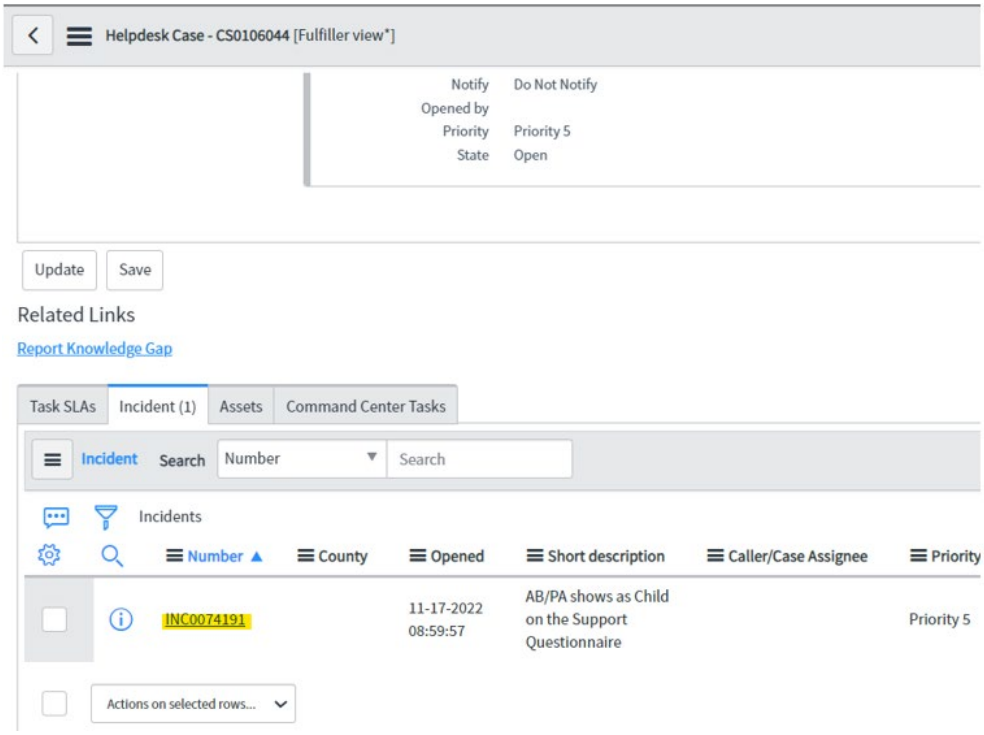
Pending access to ServiceNow, workers can log into ServiceNow, navigate to the Customer Service area, select All, change the Search Criteria to Case, enter the CS number provided and hit enter. The ServiceNow system will provide a listing of applicable CS-numbers based on the search criteria entered.



After completing the Case Search, the worker will click on the *CS hyperlink* to open the Case.



Once in the Case, the worker scrolls to the bottom for the *Incident hyperlink*. The worker will select the *Incident hyperlink* which is highlighted in the example below.

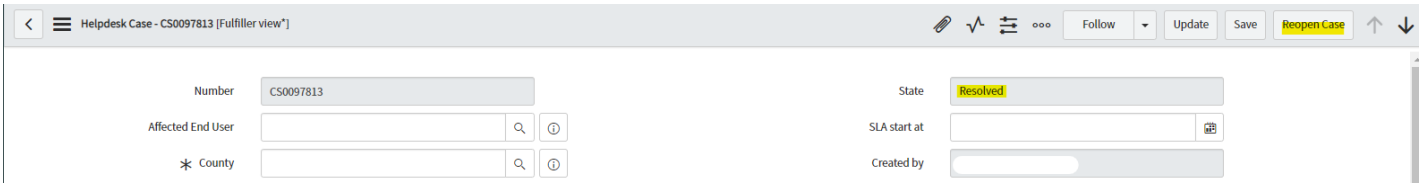


Once in the Incident the worker views the notes and reviews the status of the ticket; if the incident has been related to a Problem, SCR, or DCR.

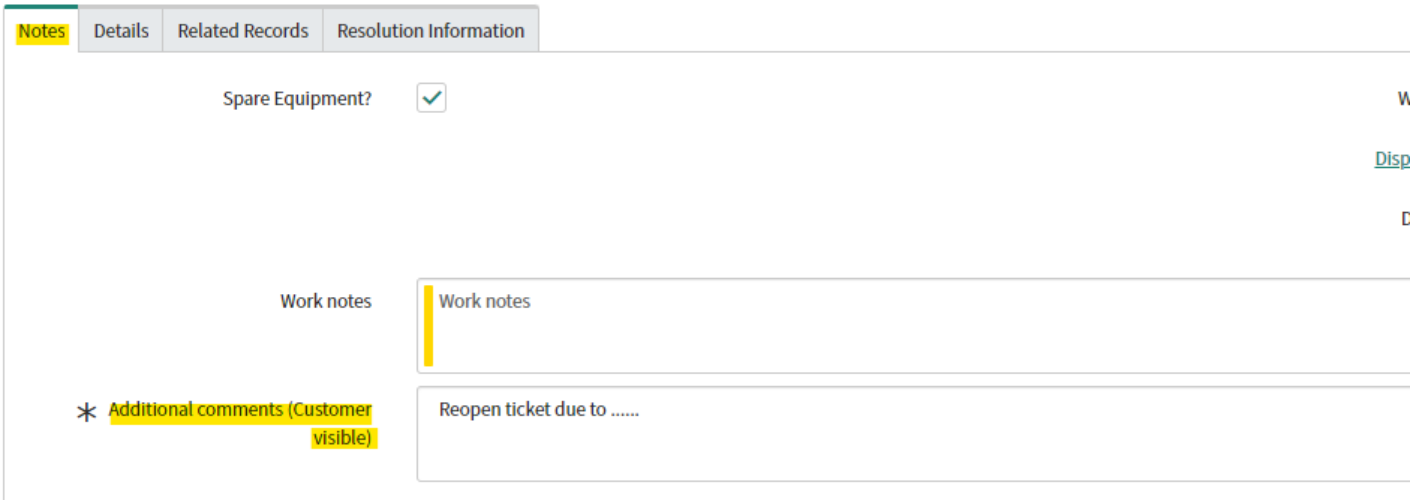
My ticket has been closed, how do I reopen it?

Once a ticket is in the **Resolved** state, it has 15 calendar days before it is automatically closed by the system; during which time it can be reopened. A ServiceNow worker with Fulfiller rights will select the **Reopen Case** button on the top right of the helpdesk case record.

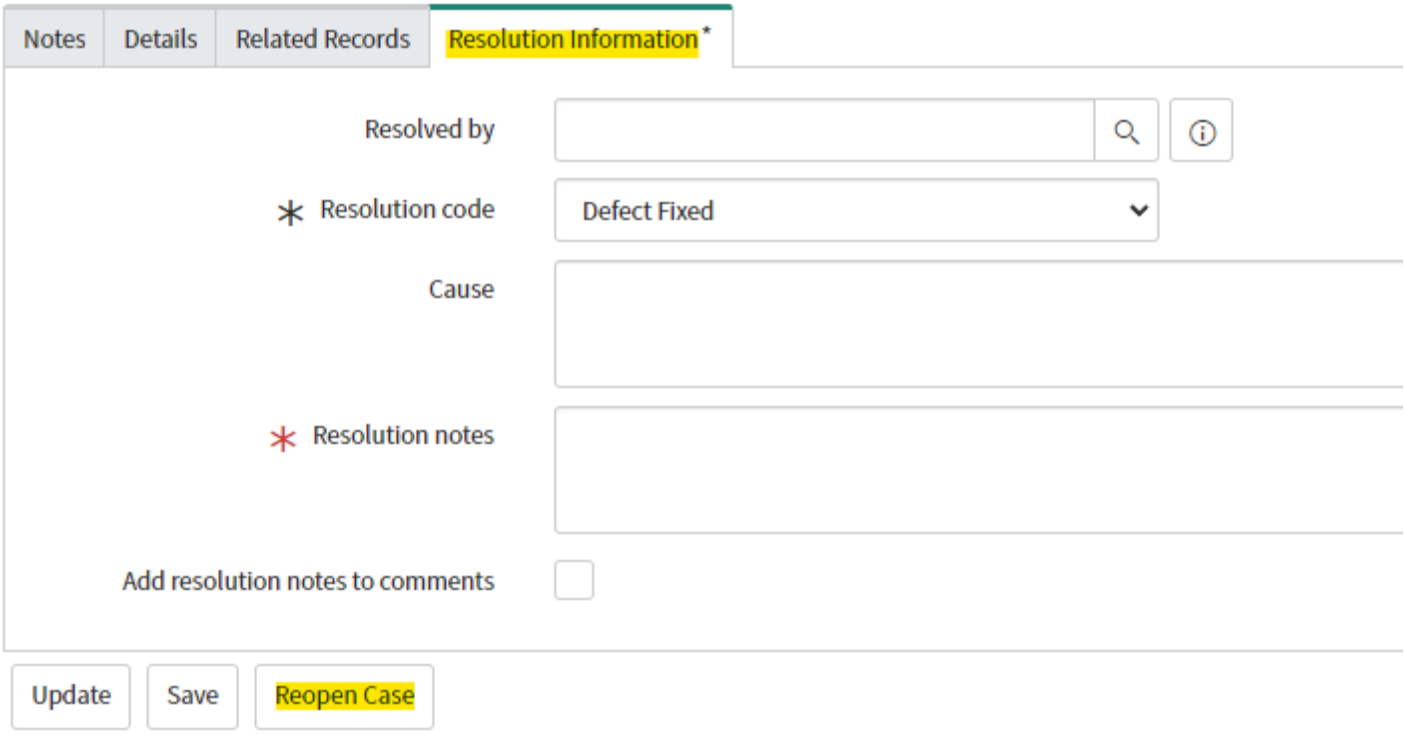
Note: Once the 15 calendar days after it has been marked as **Resolved** is elapsed, the ticket is **Closed**, and cannot be reopened and will need to have a new ticket created.



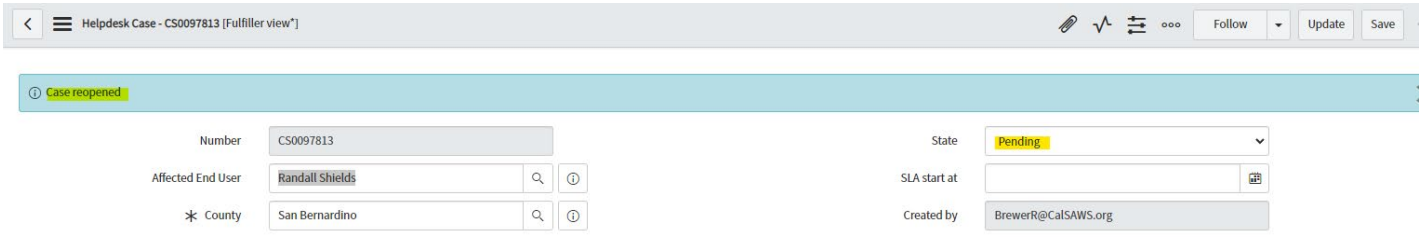
Navigate to the **Notes** tab and enter the reason for reopening the ticket in the **Additional comments (Customer visible)** area.



The worker would then navigate to the Notes/Details/Related Records/Resolution Information tabs area, select the **Resolution Information** tab and then the **Reopen Case** button.



The ticket will now have been moved from Resolved to Pending.

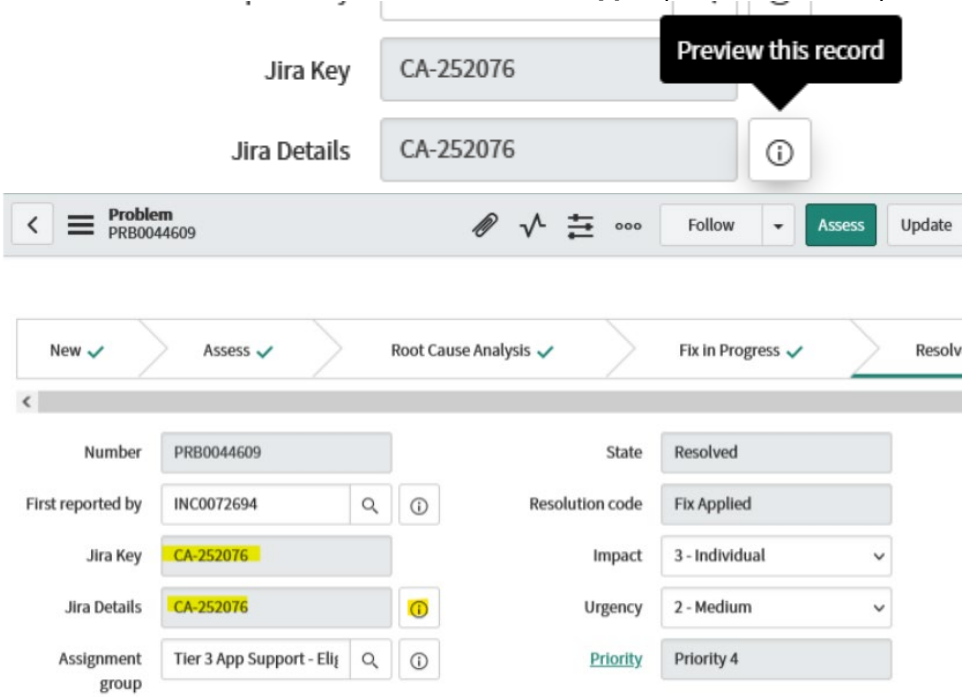


Note: If the ticket was associated to an Incident, the Incident will now also be Pending and reflect the notes entered into the ticket.

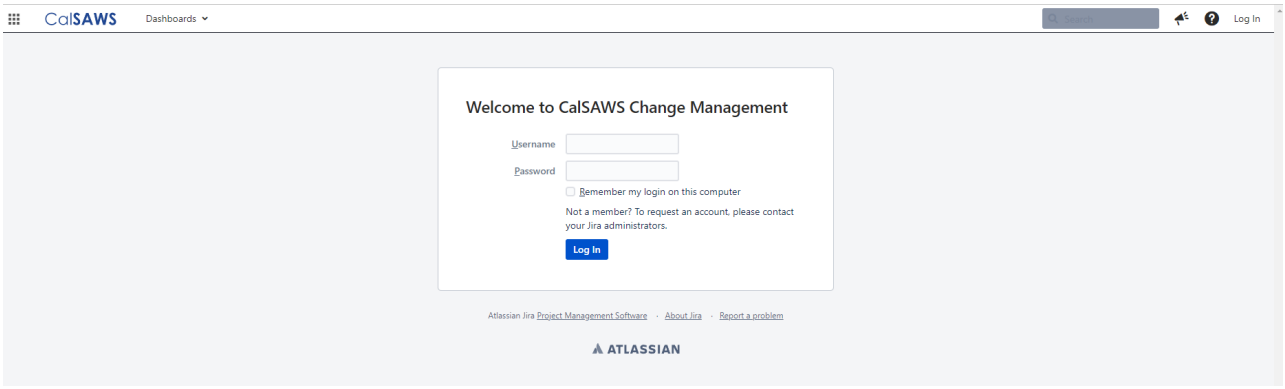
Jira

From the Problem in ServiceNow there are two places to get the SCR number: **Jira Key** and **Jira Details**.

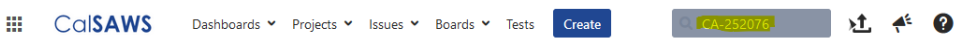
- **Jira Key** is what the system uses to link up to records in Jira
- **Jira Details**, if populated, indicates the linkage to Jira is successful.
    - Click the circle (i) button next to Jira Details to view more Jira info in ServiceNow, such as **Jira status, release, issue type** (defects vs SCR), and more.



1. The designated county staff that have been given access to Jira can then login to Jira and view the SCR.



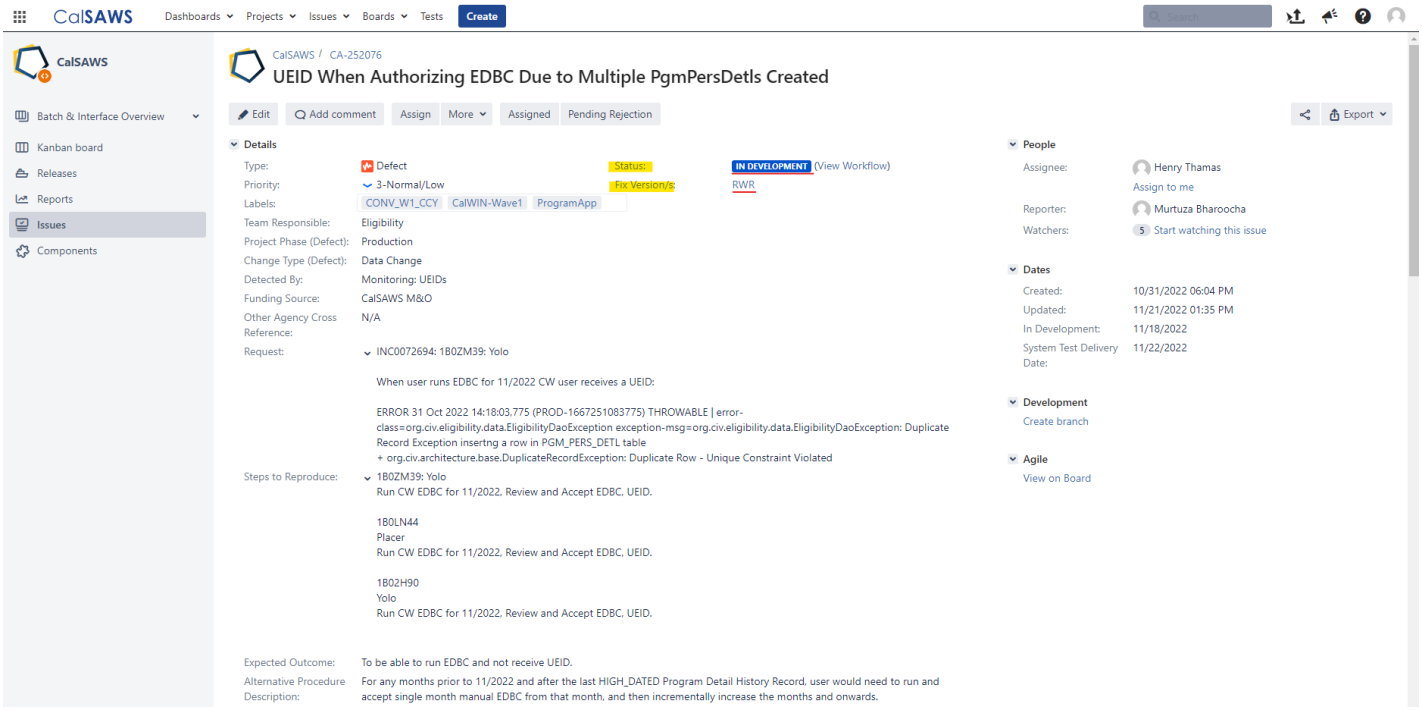
2. Once logged into Jira type in the SCR number and hit enter. The screenshot below illustrates the search function (top right corner).



3. Jira will display the SCR entered.

Note: Look for the **Status** update to understand where in the Jira workflow the SCR is, and the **Fix Version/s**, which highlights the expected date the SCR will go into CalSAWS production.

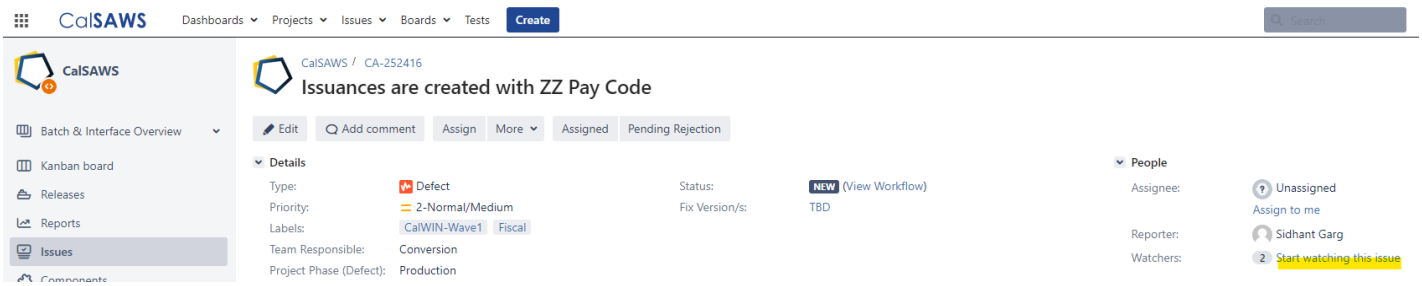
The screenshot below illustrates the details of the SCR in Jira.



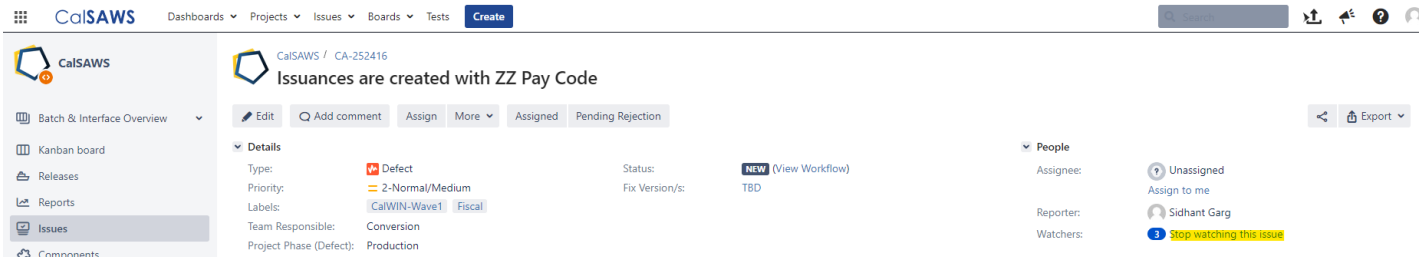
4. For this SCR the current Status is **In Development** and the Fix Version/s is **RWR** (Release When Ready). If the Fix Version/s is **RWR** that means once a Fix has been tested and accepted that it will be in the next Release that is available.

How to Watch an SCR/Defect in Jira.

Once you have found the SCR/Defect that you are looking for sometimes you want to keep track of the SCR/Defect and be notified when any changes occur on the SCR/Defect. To do this the worker would select the **Start watching this issue** link on the SCR/Defect.



Once an SCR/Defect has been selected to Start Watching, the system will send email notifications out on **EVERY** change made to the SCR/Defect, not just when the Status of the SCR/Defect changes. The SCR/Defect can be removed from being watched by selecting the **Stop watching this issue** link.



Who and how are Defects prioritized?

When a defect is found by Level 3 CalSAWS Help Desk, the CalSAWS team will look at how the defect is affecting the CalSAWS system and assign a Priority level. They will then begin work on the highest priority first as it affects the most users or leads to large scale data corruption or data integrity issues.

There are four levels of defect prioritization:

Level 4 - This is a cosmetic or minimal impact change to CalSAWS functionality or its usage. These are defects against functionality that are clearly wrong, but do not materially impact business usage. These defects do not impact the workload of users or cause incorrect benefits to be issued. There is no data corruption or data integrity issue.

Level 3 – These are Features that are not working correctly in CalSAWS, but they are not stopping progress. These defects have an acceptable workaround available. Workload impacts to the users at large are isolated to the functionality tied to the identified defect. Data corruption or data integrity is not an issue with a Level 3 defect (it may exist, but is only isolated to a single case, or other single data related instance identified through the defect).

Level 2 – These are defects that lead to non-working features where a workaround is cumbersome, or there is no workaround, but the defect is not in the critical path of normal

business. There may be a workload issue to an office, or there may be data corruption or data integrity, but neither is severe or widespread.

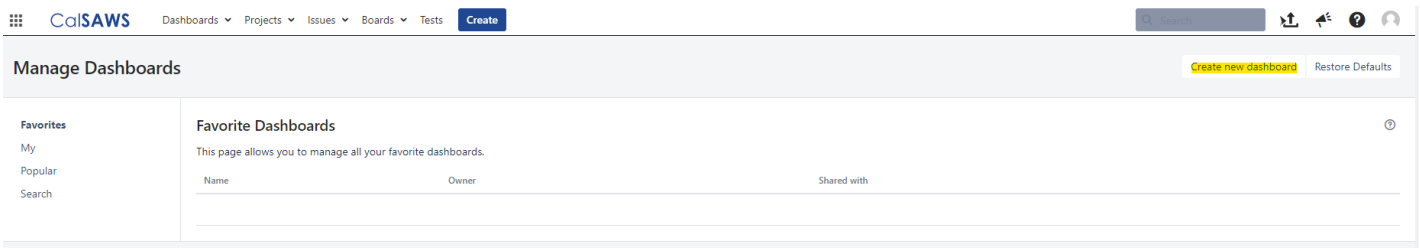
Level 1 – These are defects that cause the system or significant portions of the system to be unavailable. They are problems that do not permit work to proceed and there is no workaround. Additionally, they must be found in a critical path, meaning one affecting a large number of users and in which normal business needs to continue unabated. A defect may also be designated as Level 1 defect if it creates a severe workload impact to an office or leads to large scale data corruption or data integrity issues.

Building a Jira Dashboard

Jira provides the ability to create a dashboard to keep track of SCR's that share a common theme (e.g., County created).

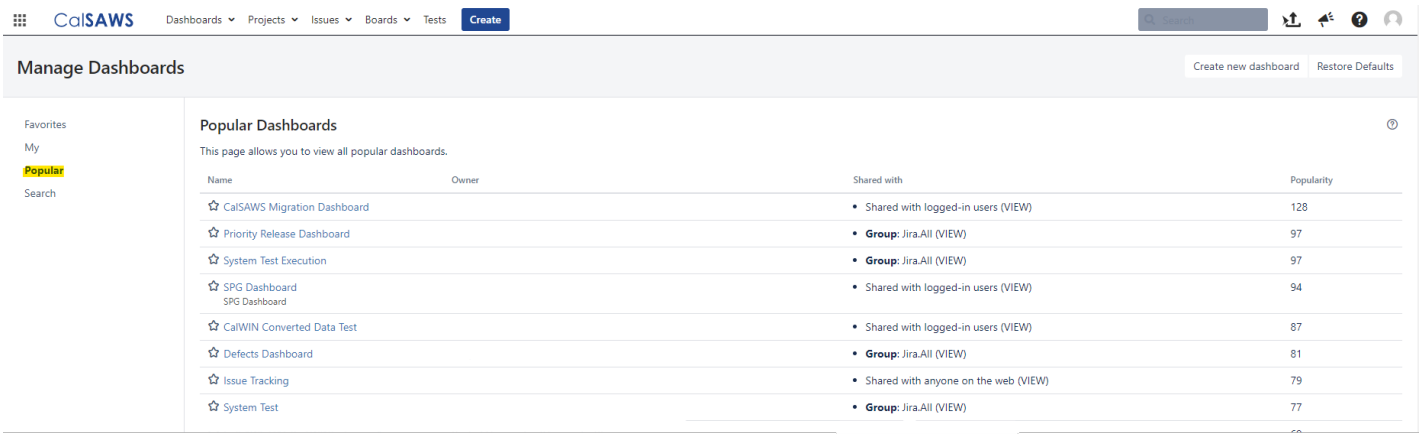
Note: Counties have designated access to Jira. Questions regarding permissions or Jira licenses should be directed to the County's Regional Manager.

1. To create a custom dashboard, select the Dashboards drop down and then the Manage Dashboards. From the **Manage Dashboards** page click on the **Create New Dashboard** button.



2. Jira also provides the option to add an existing dashboard to a user's 'Favorites' by selecting **Popular** (which brings back the most used Dashboards in Jira) or by performing a search based on criteria entered.

The Jira screenshot below illustrates the 'Popular' search.



The Jira screenshot below illustrates the 'Search' dashboards functionality.

Adding a Dashboard as a 'Favorite'

1. To add a dashboard as favorite, select the **Star** symbol.

Note: Once the Dashboard has been added as a favorite it is available in the Dashboard drop down at the top of the navigation toolbar.