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Introduction

ServiceNow is an online ticketing system that allows Cal State LA users to report IT issues and request services. The system keeps a log of all activities and automatically emails status updates, allowing users to track the status of a service request or ticket that has been submitted. This handout provides an overview of the ServiceNow user interface and covers how to create and work on incident tickets, request and work on Service Catalog items, approve requests, delegate approvals, search the knowledge bases, and get help.

Logging In

You can log in to ServiceNow from any device with an internet connection using your myCSULA Identity account.

To log in to ServiceNow:

1. Launch a web browser and visit the ServiceNow login page (see Figure 1).
2. Enter your myCSULA Identity username and password in the corresponding fields, and then click the Login button.

![ServiceNow Login Page](image1.png)

**Figure 1 – ServiceNow Login Page**

**NOTE:** You can quickly navigate to the ServiceNow login page from any page within the Information Technology Services website by clicking Quick Links on the horizontal menu, and then clicking ServiceNow (see Figure 2).

![Horizontal Menu of the Information Technology Services Website](image2.png)

**Figure 2 – Horizontal Menu of the Information Technology Services Website**

User Interface Overview

The ServiceNow user interface is divided into the following four areas (see Figure 3).

1. The Banner pane contains global navigation controls and tools.
2. The Edge toolbar provides quick access to commonly used features and pages.
3. The Navigator pane provides access to all available applications and modules.
4. The Content pane displays lists, forms, homepages, or reports.
Banner Pane

The Banner pane is located at the top of the user interface and contains the following global navigation controls and tools (see Figure 4).

1. The Welcome message shows your name and provides a link to your profile.
2. The Global Search box can be used to search for text in the entire system.
3. The Collapse/Expand Banner icon changes the amount of space the Banner pane occupies.
4. The Settings icon displays the Settings menu which allows you to set your preferences.
5. The Logout button logs you out of the system and returns to the login page.

Edge Toolbar

The Edge toolbar is located on the left side of the user interface and provides quick access to commonly used features and pages (see Figure 5). By default, the toolbar includes the following five buttons.

1. The Toggle Navigator button shows or hides the Navigator pane.
2. The List and Form View button splits the Content pane into two panes, a List pane and a Form pane.
3. The Tagged Documents button displays the Tagged Documents page.
4. The All Bookmarks button provides a list of all bookmarks on the Edge toolbar.
5. The Home button displays the last visited homepage in the Content pane.
Bookmarks

You can add **bookmarks** to the Edge toolbar to items that you use frequently. Each bookmark includes an image and a title, both of which can be customized. You can create bookmarks from any of the following links: modules in the Navigator pane, breadcrumbs, links in lists, and reports. You can also edit and delete bookmarks.

**To create a bookmark:**

1. Drag a link to the **Edge** toolbar. The new bookmark appears on the toolbar (see Figure 6).

---

**Figure 5 – Edge Toolbar**

**Figure 6 – Bookmark Created from a Link in a List**
To edit or delete a bookmark:

1. On the Edge toolbar, point to the bookmark that you want to edit or delete, and then click **Edit Bookmark** on the menu that appears (see Figure 7).

![Figure 7 – Bookmark Menu](image)

2. In the **Bookmark Settings** dialog box, do one of the following (see Figure 8):
   - To delete the bookmark, click the **Delete** button.
   - To edit the bookmark, make the desired changes, and then click the **Update** button.

   **NOTE:** It is recommended to change the bookmark title to something more meaningful so that you can easily identify it.

![Figure 8 – Bookmark Settings Dialog Box](image)

**Navigator Pane**

The **Navigator** pane is located on the right side of the Edge toolbar (see Figure 9). It provides access to all available applications and modules, enabling you to quickly find information, report issues, and request services.

1. An **application** is a group of modules that provide related information and functionality. Each application appears as a section in the Navigator pane, denoted by an application label. You can collapse or expand an application by clicking its label.

2. All **modules** that an application contains are listed below the application label.Clicking a module opens it in the Content pane.

3. Each module has a **Star** icon to the left of its name that can be selected or deselected. You can mark a frequently used module as a favorite by clicking its Star icon. Clicking the **Favorites** icon at the top of the Navigator pane toggles between showing only the favorite modules and showing all modules.

4. You can use the **Filter** box at the top of the Navigator pane to quickly find an application or a module. As you enter text, the pane shows only matching applications and modules.
Content Pane

The **Content pane** is located on the right side of the Navigator pane and is the main area of the user interface (see Figure 10). It displays lists, forms, homepages, or reports.

Homepages

**Homepages** give a quick overview of the processes you are involved in. They are comprised of widgets which are sections of content that provide information and links. Homepages include the following elements (see Figure 10).

1. The **title** of the homepage appears at the top of the Content pane.
2. Any **widget** that has been added to the homepage appears below the title.
   - You can customize a list in a widget (e.g., add or remove columns) by clicking the **Settings** icon on the left side of the column headings, selecting the desired options in the **Personalize List Columns** dialog box, and then clicking the **OK** button.
   - You can move a widget by hovering over its title bar until the mouse pointer changes to a four-headed arrow, and then dragging the widget to the desired location on the homepage.
   - You can remove a widget by hovering over it, and then clicking the **Close** icon that appears on the right side of its title bar.
3. The **Add content** icon in the upper-left corner of the homepage is used to add new widgets to the page.
4. The **Refresh** icon on the right side of the homepage title is used to refresh the page. You can also use the drop-down list next to the icon to specify a refresh time of 5, 15, 30, or 60 minutes. The default is Off (no refresh).
5. The **Switch to page** drop-down list in the upper-right corner of the homepage is used to switch to another homepage.
When you log in to ServiceNow, the default homepage (ITIL Homepage) appears in the Content pane and includes two widgets (see Figure 10). The **My Work** widget displays a list of all tickets that are assigned to you. The **My Groups Work** widget displays a list of all tickets that are assigned to your group.

You can create a custom homepage to suit your needs. When you start customizing the **ITIL Homepage**, the system automatically creates a new homepage with the word **My** in front of the title (e.g., **My ITIL Homepage**), indicating that it is your personal homepage. If you no longer need a custom homepage, you can delete it by clicking the **Delete page** link in the lower-right corner of the page.

---

**Lists**

In ServiceNow, data is organized into **lists** of records (see Figure 11). You can search, sort, filter, and customize lists. The list interface consists of a title bar, filters and breadcrumbs, and columns of data.

1. **The title bar** displays the name of the list and provides access to several controls.
   - The **Menu** icon provides access to options related to viewing and filtering the list.
   - The **New** button opens a form which can be used to create a new record.
   - The **Go to** or **Search** box can be used to find information in the current list.
2. **Filters** and **breadcrumbs** can be used to display only the records that you need.
   - A **filter** restricts what records appear in a list by providing a set of conditions each record must meet to be included in the list. You can apply a filter by clicking the **Filter** icon to open the condition builder, selecting the desired options, and then clicking the **Run** button.
   - **Breadcrumbs** offer a quick form of filter navigation. The left condition is the most general and the right condition is the most specific. Clicking a breadcrumb removes all the conditions to its right. Clicking the condition separator (>) before a condition removes only that condition.
3. **Column headings** appear at the top of each column and provide access to several list controls.
   - You can quickly find information in a list by sorting the list. Clicking a column heading sorts the list in ascending order; clicking it again sorts the list in descending order. The current sort order is indicated by an arrow next to the column heading. A downward pointing arrow indicates that the column is sorted in descending order.
   - You can customize a list by clicking the **Settings** icon to open the **Personalize List Columns** dialog box, selecting the desired options, and then clicking the **OK** button.
   - You can search a single column by clicking the **Search** icon to add a **Search** box below each column heading, entering the search term in the **Search** box of the desired column, and then pressing the **Enter** key.
Incidents

An incident is any event which causes an interruption or a reduction of the quality of an IT service. ServiceNow allows IT staff members to log an incident, classify it according to impact and urgency, and manage it through the entire incident life cycle until the issue has been resolved.

The incident life cycle includes several states (see Table 1). As part of the process, a service level agreement (SLA) is used to ensure that an incident is resolved within a certain amount of time. The SLA timer starts counting when the incident ticket is created.

Table 1 – Incident States

<table>
<thead>
<tr>
<th>State</th>
<th>Description</th>
<th>SLA Timer</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>The incident ticket is created, but it is not being worked on.</td>
<td>Counting</td>
</tr>
<tr>
<td>Active</td>
<td>The incident ticket is assigned and is being worked on.</td>
<td>Counting</td>
</tr>
<tr>
<td>Awaiting User Info</td>
<td>The user is asked to provide additional information before the incident ticket can be resolved.</td>
<td>Paused</td>
</tr>
<tr>
<td>Awaiting Evidence</td>
<td>The user is asked to confirm that the implemented resolution has fixed the issue.</td>
<td>Paused</td>
</tr>
<tr>
<td>Resolved</td>
<td>The incident ticket is resolved and the user is notified.</td>
<td>Stopped</td>
</tr>
<tr>
<td>Closed</td>
<td>The incident ticket is marked Closed after it has been in the Resolved state for 10 days.</td>
<td>Stopped</td>
</tr>
</tbody>
</table>

Creating Incident Tickets

As an IT staff member, you can create an incident ticket for yourself or on behalf of someone else.

To create an incident ticket:
1. In the Navigator pane, under Incident, click Create New (see Figure 12).
2. The Incident form opens in the Content pane (see Figure 13). Fill in all relevant fields (see Table 2 for a description of each field).

   NOTE: Fields marked with a red asterisk are required. Fields marked with a gray asterisk are recommended, but are not required. Read-only fields have a gray background.
3. To add an attachment, click the Attachment icon on the form’s title bar to open the Attachments dialog box, select the file that you want to attach, click the Attach button, and then click the Close button. The attachment appears at the top of the form.
4. When finished, click the Submit button. An email notification is sent to the user and to the members of the assigned group.

Figure 12 – Create New Module in the Navigator Pane

Figure 13 – Incident Form in the Content Pane
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td>This is a unique, auto-generated number for the incident ticket. Incident numbers are preceded with the INC prefix (e.g., INC00000001).</td>
</tr>
<tr>
<td>Caller</td>
<td>Enter the name of the user who is reporting or is affected by the incident. You can start typing the user’s name, username, or CIN to display a list of matching users, and then select the appropriate user from the list. You can also click the Lookup icon on the right side of the field and select a user from the list. Once you select a user, one or more fields autofill with the user’s information.</td>
</tr>
<tr>
<td>Location</td>
<td>If the user is an active employee, this field is autofilled with the user’s office location.</td>
</tr>
<tr>
<td>CIN/Employee ID</td>
<td>Enter the user’s CIN or Employee ID.</td>
</tr>
<tr>
<td>myCSULA Identity Username</td>
<td>Enter the user’s myCSULA Identity username.</td>
</tr>
<tr>
<td>Phone Number</td>
<td>Enter the user’s phone number.</td>
</tr>
<tr>
<td>College/Department</td>
<td>Enter the user’s college or department. You can also click the Lookup icon on the right side of the field and select a college or department from the list.</td>
</tr>
<tr>
<td>Category</td>
<td>Select a category based on the type of incident being reported.</td>
</tr>
<tr>
<td>Subcategory</td>
<td>If applicable, select a subcategory for the incident. The options available in the subcategory list are dependent on the selected category.</td>
</tr>
<tr>
<td>Opened</td>
<td>This field is autofilled with the date and time the incident ticket is created.</td>
</tr>
<tr>
<td>Opened by</td>
<td>This field is autofilled with the logged in user’s name.</td>
</tr>
<tr>
<td>Contact type</td>
<td>Select the type of communication used to report the incident.</td>
</tr>
<tr>
<td>State</td>
<td>Select the current state of the incident.</td>
</tr>
<tr>
<td>Assignment group</td>
<td>Enter the group to assign the incident to. You can also click the Lookup icon on the right side of the field and select a group from the list.</td>
</tr>
<tr>
<td>Assigned to</td>
<td>If known, enter the group member to assign the incident to. You can also click the Lookup icon on the right side of the field and select a group member from the list.</td>
</tr>
<tr>
<td>Impact</td>
<td>Select the level of impact (3 - Low, 2 - Medium, or 1 - High) based on the number of users that are affected. The more users affected, the higher the impact.</td>
</tr>
<tr>
<td>Urgency</td>
<td>Select the urgency (3 - Low, 2 - Medium, or 1 - High) based on how much the incident impairs the user’s ability to work.</td>
</tr>
<tr>
<td>Priority</td>
<td>This field is automatically set based on the selected impact and urgency.</td>
</tr>
<tr>
<td>Short description</td>
<td>Enter a brief description of the incident. The short description should answer who (type of user), what (issue and device), and where (location). You can also click the Suggestion icon on the right side of the field and select a description from the list of common issues.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a detailed description of the incident. The description should answer <strong>who</strong> (type of user and their contact information), <strong>what</strong> (issue and device information in detail), <strong>where</strong> (location), <strong>when</strong> (and frequency), and any initial troubleshooting that has been done.</td>
</tr>
<tr>
<td>Watch list</td>
<td>Click the <strong>Edit Watch list</strong> icon to add users who will receive email notifications regarding ticket updates and status changes. Click the <strong>Add me</strong> icon to add yourself to the list.</td>
</tr>
<tr>
<td>Work notes list</td>
<td>Click the <strong>Edit Work notes list</strong> icon to add users who will receive email notifications when work notes are added to the incident. Click the <strong>Add me</strong> icon to add yourself to the list.</td>
</tr>
<tr>
<td>Additional comments</td>
<td>Enter any information that you want the user to be aware of. Anything entered in this field will be added to the <strong>Activity</strong> log and sent to the user via email.</td>
</tr>
<tr>
<td>Work notes (Customer visible)</td>
<td>If applicable, enter information about how to resolve the incident, or steps already taken to resolve it. Work notes are not seen by end-users.</td>
</tr>
</tbody>
</table>

**Using Templates**

ServiceNow includes several templates to simplify the process of creating an incident ticket. Templates automatically fill in the appropriate fields for a specific type of incident, reducing the amount of time you spend completing a form.

**NOTE:** Applying a template to an existing ticket will overwrite data in certain fields. Thus, it is suggested that you use templates to create a new incident or as a reference for existing tickets.

**To use a template:**

1. In the **Navigator** pane, under **Incident**, click **Create New** (see Figure 12). The **Incident** form opens in the **Content** pane (see Figure 13).

2. Click the **Menu** icon on the left side of the form’s title bar, point to **Templates**, point to **Apply Template**, and then click the desired template (see Figure 14). The selected template autofills one or more fields.

3. Fill in the remaining fields as applicable.

4. When finished, click the **Submit** button.

![Figure 14 – Incident Form Context Menu](image-url)
Working on Incident Tickets

When an incident ticket is assigned to you or your group, you will receive an email notification that includes the incident number and some details. You should open the incident ticket and work on its resolution as soon as possible.

To work on an incident ticket:

1. Click the incident number in the email notification to open the ticket in ServiceNow. The Incident form opens in the Content pane.

   NOTE: You can also open incident tickets within ServiceNow by navigating to the ITIL Homepage, and then clicking the incident number in the My Work or My Groups Work widget.

2. If necessary, assign the ticket to yourself by entering your name in the Assigned to field.

3. Update all relevant fields and add notes as appropriate. Use the Additional comments (Customer visible) field to enter any information that needs to be communicated to the user (such as follow-ups with the user or work performed on the ticket).

4. To add an attachment, click the Attachment icon on the form’s title bar to open the Attachments dialog box, select the file that you want to attach, click the Attach button, and then click the Close button. The attachment appears at the top of the form.

5. When finished, click the Update button on the form’s title bar (see Figure 15).

   NOTE: A history of each change is saved in the Activity log (see Figure 16).

![Figure 15 – Update Button on the Incident Form Title Bar](image)

![Figure 16 – Activity Log Section of the Incident Form](image)

Attaching Knowledge Base Articles to Incident Tickets

ServiceNow includes knowledge base articles that may answer frequently asked questions or contain the resolution to common issues. Sending the appropriate knowledge base article to a user may provide useful information or help them resolve issues on their own.
To attach a knowledge base article to an incident ticket:

1. Open the incident ticket to which you want to attach a knowledge base article. The Incident form opens in the Content pane. The Related Search Results section below the Description field lists knowledge base articles based on text entered in the Short description field (see Figure 17).

   **NOTE:** You can preview an article by clicking its title or the Preview button.

2. Click the Attach button next to the article that you want to attach. Its content is copied to the Additional comments (Customer visible) field.

3. Click the Update button on the form’s title bar. An email notification containing the knowledge base article is sent to the user.

![Figure 17 – Related Search Results Section of the Incident Form](image)

**Resolving and Closing Incident Tickets**

After resolving an incident, you should update the incident ticket and communicate with the user. When the ticket is placed in the Resolved state, the user is notified via email that the issue is resolved and to review the resolution. If needed, the user can reopen the ticket by clicking the link in the email notification. If the user is satisfied with the resolution and takes no action, the ticket is automatically closed after 10 days.

**NOTE:** Once an incident ticket is closed, it cannot be edited or reopened.

To resolve an incident ticket:

1. Open the incident ticket that you want to resolve. The Incident form opens in the Content pane.

2. On the Notes tab, in the Additional comments (Customer visible) field, enter comments for the user such as how the incident was resolved or what is the next step the user needs to take (see Figure 18).
3. On the **Closure Information** tab, select the appropriate option from the **Close code** drop-down list, and then enter notes on how the incident was resolved in the **Close notes** field (see Figure 19).

4. When finished, click the **Resolve Incident** button on the form’s title bar (see Figure 20). The ticket is updated and placed in the **Resolved** state, and an email notification is sent to the user indicating that the issue is resolved.

**Service Catalog**

ServiceNow includes a **Service Catalog** that enables users to request IT products and services. Catalog items are grouped into categories and subcategories to help users quickly find the items they need. Each Service Catalog request generates an associated item and task (see Figure 21). The requested item contains the details of the request, while the task contains the actions that need to be completed to fulfill the request.

**NOTE:** Request numbers are preceded with the **REQ** prefix (e.g., REQ0000001). Requested item numbers are preceded with the **RITM** prefix (e.g., RITM0000001). Task numbers are preceded with the **TASK** prefix (e.g., TASK0000001).
Requesting Service Catalog Items

The Service Catalog homepage lists the products and services that are available to request. As an IT staff member, you can submit a request for yourself or on behalf of someone else.

To request a Service Catalog item:

1. In the Navigator pane, do one of the following:
   - Under Self-Service, click Service Catalog (see Figure 22).
   - Under Service Catalog, click Catalog (see Figure 23).

2. The Service Catalog homepage opens in the Content pane (see Figure 24). In the Request for field, enter the name of the user for whom you are requesting the item.
   
   **NOTE:** By default, this field is autofilled with the logged in user’s name.

3. Click the desired category (e.g., Network Services), and then click the catalog item that you want to request (e.g., Data Jack Activation).

   **NOTE:** If the product or service that you want to request is not included in the available categories, click the Can We Help You category on the Service Catalog homepage, and then click Request a Service (see Figure 24).
4. The Service Catalog request form for the selected item opens in the Content pane (see Figure 25). Fill in all relevant fields.

**NOTE**: Fields marked with a red asterisk are required. Fields marked with a gray asterisk are recommended, but are not required. Read-only fields have a gray background.

5. To add an attachment, click the Attachment icon on the form’s title bar to open the Attachments dialog box, select the file that you want to attach, click the Attach button, and then click the Close button. The attachment appears at the top of the form.

6. When finished, click the Submit Request button. An email notification is sent to the user submitting the form as well as the user who will be receiving the requested item.
Approving or Rejecting Service Catalog Requests

If a Service Catalog item requires approval before it can be fulfilled, the designated approver is automatically notified via email that they have an item to approve. The approver can approve or reject a requested item via email or ServiceNow.

To approve or reject a requested item via email:
1. In Outlook, open the email notification for the item that requires your approval.
2. Click the Approve or Reject link.
3. Click the Send button.

To approve or reject a requested item via ServiceNow:
1. In the Navigator pane, under Self-Service, click My Approvals (see Figure 26).

![Figure 26 – My Approvals Module in the Navigator Pane](image)

2. The Approvals list opens in the Content pane. Locate the item that you want to approve, and then click the link in the State column (see Figure 27).

![Figure 27 – Approvals List in the Content Pane](image)
3. The Approval form opens in the Content pane. Review the request, and then click the Approve or Reject button on the form’s title bar (see Figure 28).

![Figure 28 – Approval Form in the Content Pane](image)

**Closing Service Catalog Tasks**

When a task is assigned to you, you will receive an email notification that includes the task number and some details. Once you complete the work described in the task, you should close the task.

**To close a service catalog task:**
1. Click the task number in the email notification to open the task in ServiceNow. The Catalog Task form opens in the Content pane (see Figure 29).

   **NOTE:** You can also open tasks within ServiceNow by navigating to the ITIL Homepage, and then clicking the task number in the My Work or My Groups Work widget.

2. If necessary, assign the task to yourself by entering your name in the Assigned to field.
3. In the Work notes field, enter notes on how the task was completed.
4. Click the Close Task button on the form’s title bar.

![Figure 29 – Catalog Task Form in the Content Pane](image)
Delegating Approvals and Tasks to Another User

If you will be out of the office for an extended period of time, you can delegate your responsibilities to another user to ensure that ServiceNow approval requests are processed and tasks are completed.

To delegate approvals and tasks to another user:

1. In the Navigator pane, under Self-Service, click My Profile (see Figure 30).

![Figure 30 – My Profile Module in the Navigator Pane](image)

2. Your profile page opens in the Content pane. On the Delegates tab, click the New button (see Figure 31).

![Figure 31 – Delegates Tab in the Content Pane](image)

3. The Delegate form opens in the Content pane (see Figure 32). In the Delegate field, enter the name of the delegate. Or, click the Lookup icon on the right side of the field and select a user from the list.

   **NOTE:** Fields marked with a red asterisk are required. Read-only fields are gray.

4. In the Starts and Ends fields, set the period of time for the delegation.
5. On the right side of the form, select the check box for the type of responsibility that you want to delegate.
   - The **Approvals** option allows the delegate to approve items on your behalf.
   - The **Assignments** option allows the delegate to view and work on tasks assigned to you.
   - The **CC notifications** option copies the delegate on email notifications sent to you, except those marked Meeting Invitation.
   - The **Meeting invitations** option copies the delegate on email notifications sent of the type Meeting Invitation.

6. Click the **Submit** button.

![Delegate Form in the Content Pane](image)

**Figure 32 – Delegate Form in the Content Pane**

**Self-Service**

The **Self-Service** application is available to IT staff members as well as end-users (see Figure 33). It enables users to report an issue, request a service, track their requests, and access the knowledge bases.

![Self-Service Application in the Navigator Pane](image)

**Figure 33 – Self-Service Application in the Navigator Pane**
Searching the Knowledge Bases

ServiceNow includes two knowledge bases. The IT knowledge base can only be accessed by IT staff members; Knowledge can be accessed by all users. Articles within each knowledge base are organized by category. You can browse and search the knowledge bases to find information or solutions to problems.

To search the knowledge bases:

1. In the Navigator pane, under Self-Service, click Knowledge (see Figure 33). The Knowledge homepage opens in the Content pane (see Figure 34).
2. Select the knowledge base that you want to search (IT or Knowledge).
   
   **NOTE:** If you do not select a specific knowledge base, search results include articles from all knowledge bases that you can access.
3. Enter one or more keywords in the Search box at the top of the Knowledge homepage, and then press the Enter key. The search results display in the Content pane.
4. Click an article to open it.

Getting Help

ServiceNow includes a contextual help feature that can be used to get assistance on any topic or task.

To get help:

1. Click the Settings icon on the right side of the Banner pane, and then click the Help icon at the top of the Settings menu (see Figure 35). The ServiceNow Wiki website opens in a new tab.
2. Click any link to display the corresponding information, or use the Search box in the upper-right corner of the page to search for a specific topic.
Logging Out

Logging out prevents others from accessing your account. When you have finished using ServiceNow, you should log out of the system and close the web browser window.

**NOTE:** For security reasons, your session will time out after four hours of inactivity.

**To log out of ServiceNow:**
1. Click the **Logout** button in the **Banner** pane (see Figure 36).
2. Close the web browser window.

![Logout Button in the Banner Pane](image-url)