How to Create an Incident in ServiceNow

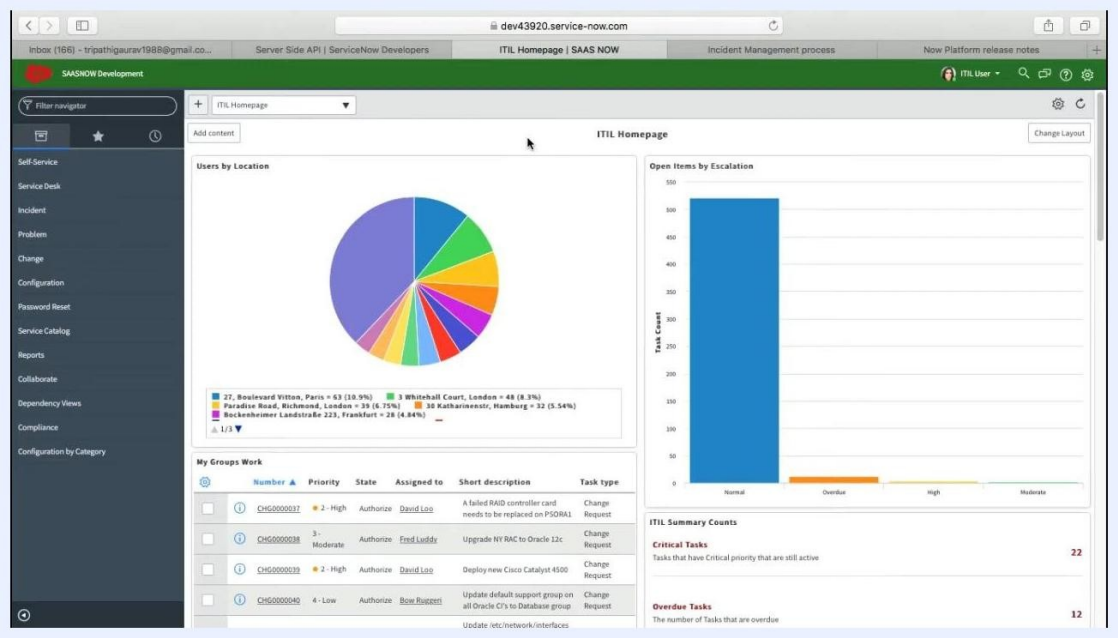
This guide walks you through how to create an incident in ServiceNow, from opening the dashboard to filling in the required fields and saving the record. Follow these steps to ensure your incident is logged with complete information and routed to the correct support group.

Prerequisites

- Access to your organization's ServiceNow instance
- Valid login credentials to reach the main dashboard

Step 1: Access the ServiceNow dashboard

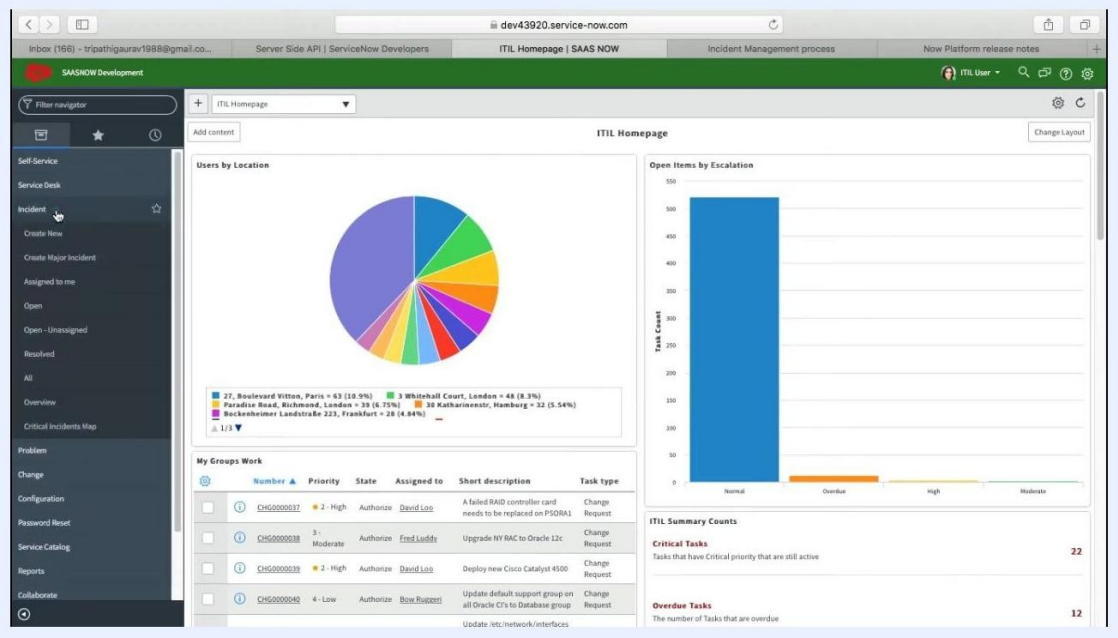
Open your web browser and navigate to your ServiceNow instance. Log in and confirm you are on the main dashboard, where widgets such as Users by Location and Open Items by Escalation are visible.



ServiceNow dashboard with charts and navigation menu on the left

Step 2: Navigate to the Incident application

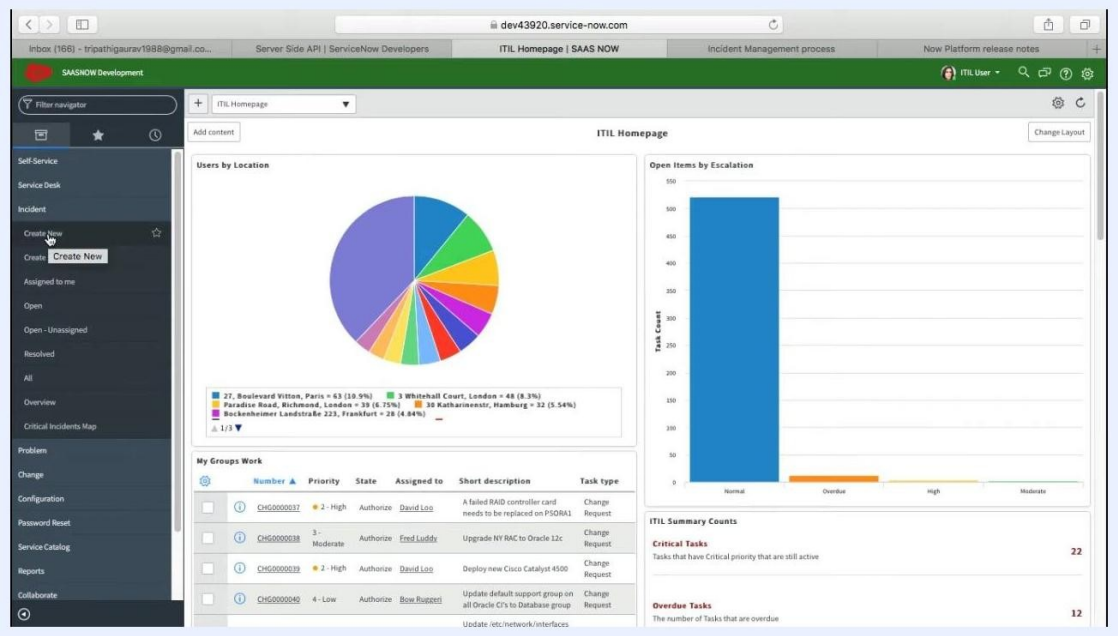
In the left-hand navigation pane, scroll down to find the Incident section under the Service Desk category. Click Incident to expand its sub-options.



Navigation menu expanded to show the Incident section with sub-options

Step 3: Open a new incident form

Under the expanded Incident section, click Create New. This opens a blank incident form where you can enter the details of your issue.



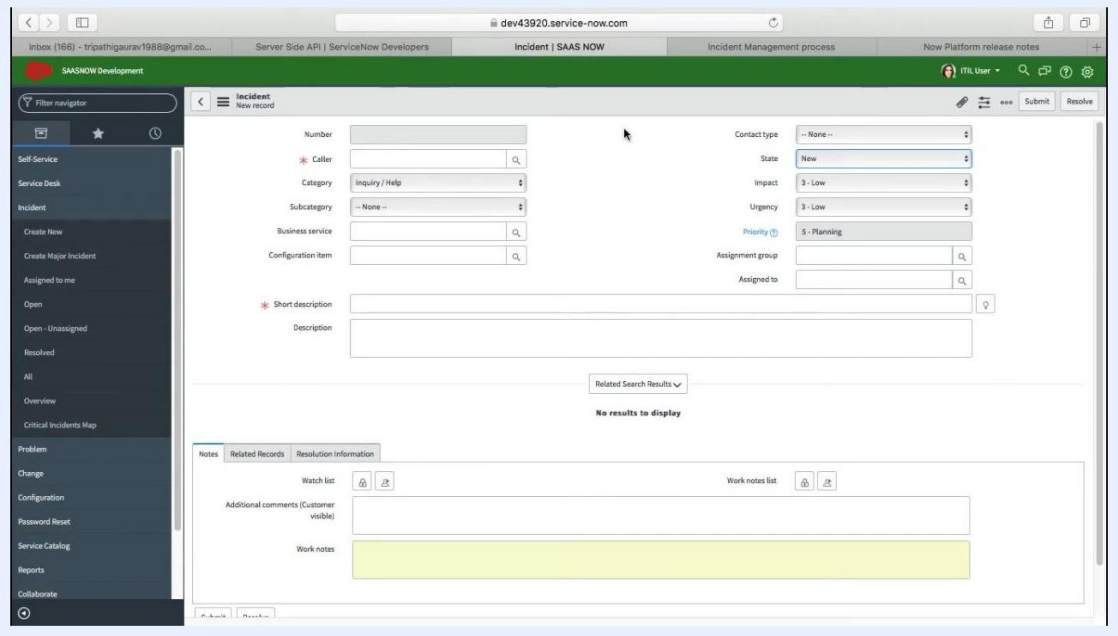
Cursor hovering over 'Create New' under Incident in the navigation menu

Step 4: Review the incident form fields

The form displays several fields, including:

- Number (auto-generated)
- Caller (mandatory)
- Category (default: Inquiry / Help)
- Subcategory
- Business service
- Configuration item
- Short description (mandatory)
- Description
- Additional fields such as Contact type, State, Impact, Urgency, Priority, Assignment group, and Assigned to

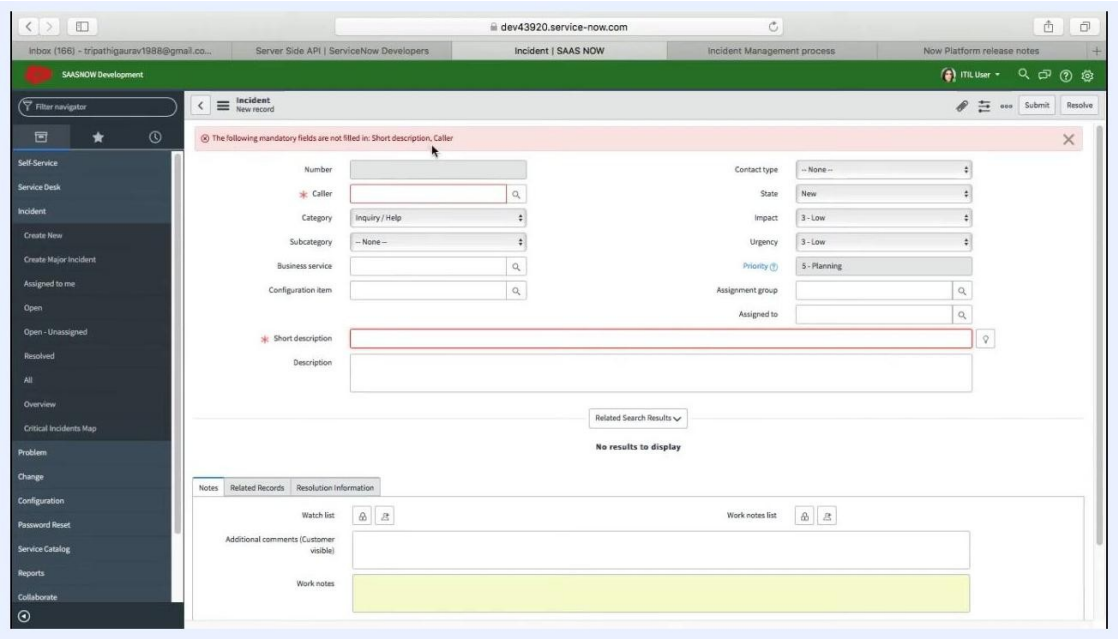
Fields marked with a red asterisk (*) are mandatory.



Blank incident form with all fields visible, including mandatory Caller and Short Description

Step 5: Understand mandatory field validation

If you click Submit without entering values for the mandatory fields (Caller and Short description), an error message appears at the top of the form: "The following mandatory fields are not filled in: Short description, Caller." Fill in these fields before submitting.

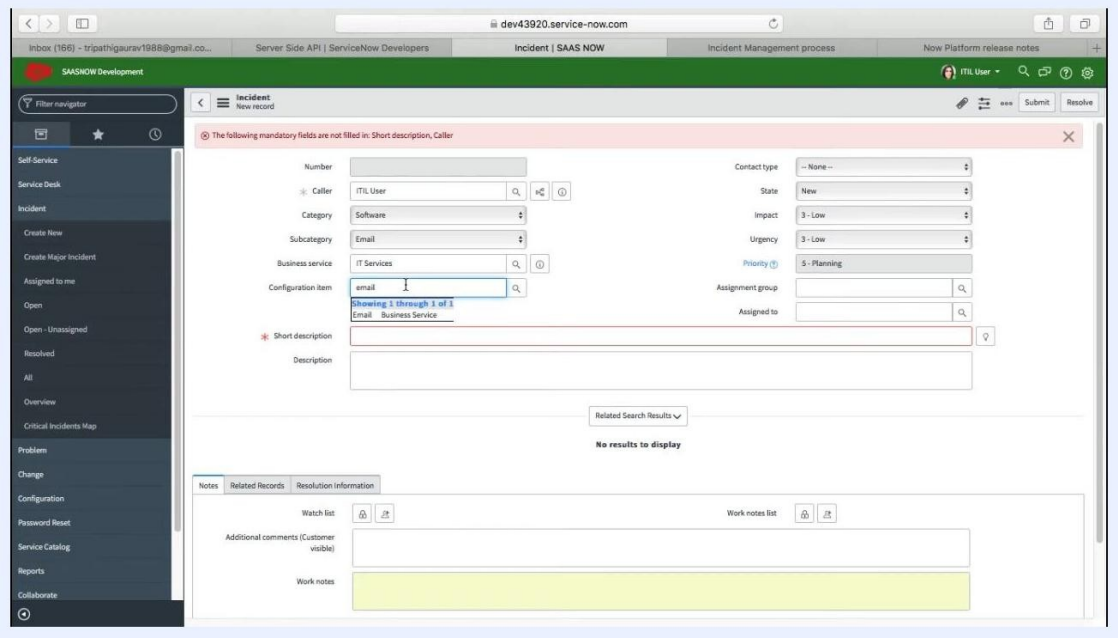


Incident form showing an error message for missing mandatory fields

Step 6: Fill in the caller and classification fields

- In the Caller field, enter your name or select your user account (for example, "ITIL User").
- In the Category dropdown, select the appropriate category (for example, "Software").
- In the Subcategory dropdown, select the relevant subcategory (for example, "Email").
- In the Business service field, type and select the relevant service (for example, "IT Services").

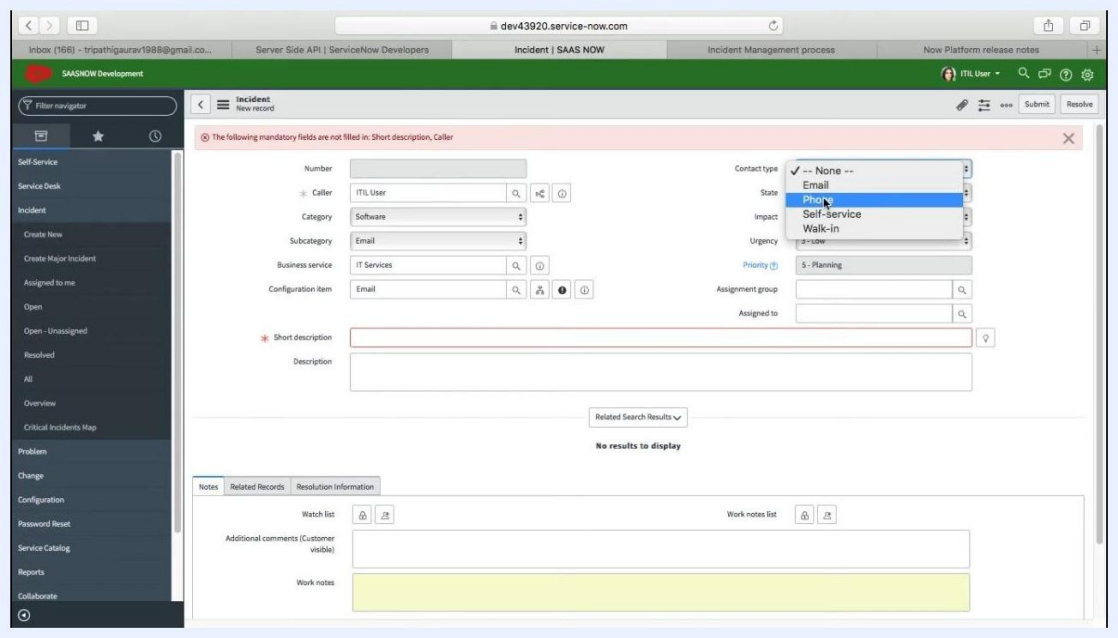
- In the Configuration item field, type and select the relevant item (for example, "Email").



Incident form being filled in: Caller, Category (Software), Subcategory (Email), Business Service (IT Services), Configuration Item (Email)

Step 7: Specify the contact type

In the Contact type dropdown, select how the incident was reported. For example, choose "Phone" if you were contacted by phone. Other available options include "Email," "Self-service," and "Walk-in."



Incident form with the 'Contact type' dropdown expanded, showing options: None, Email, Phone, Self-service, Walk-in

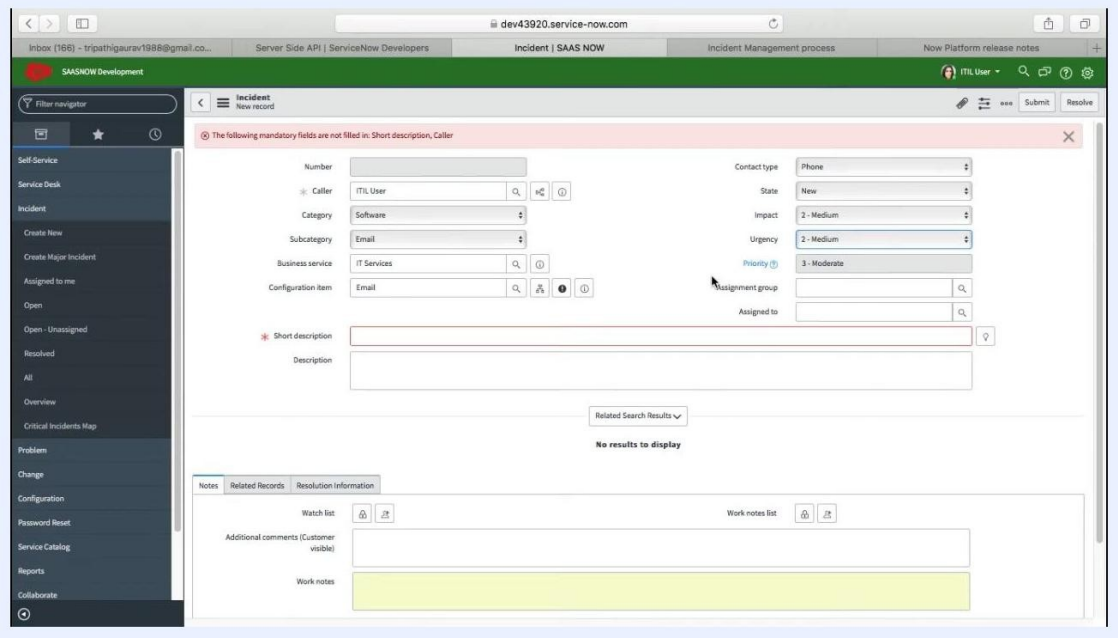
Step 8: Leave the State field as default

Do not modify the State field. It remains set to "New" by default and does not require any action from you.

Step 9: Set impact and urgency

- In the Impact dropdown, select the level of business criticality. For example, select "2 - Medium" if the issue affects a single team, such as the database team being unable to send emails.
- In the Urgency dropdown, select the urgency level. For example, select "2 - Medium" if the issue is important but not critical.

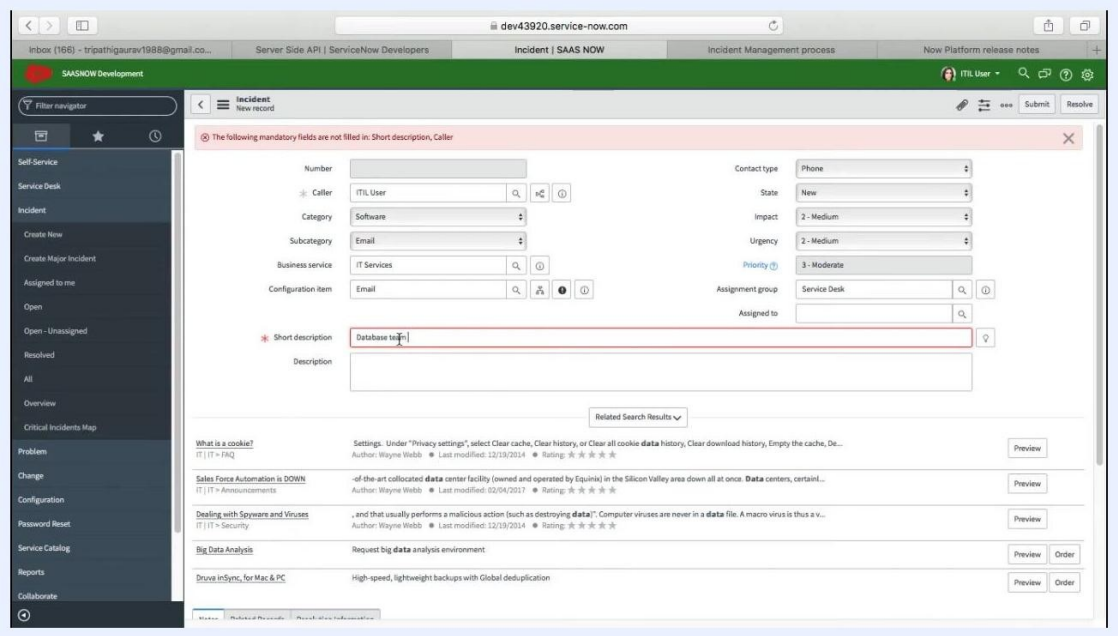
- The Priority field updates automatically based on your Impact and Urgency selections. You cannot edit Priority directly, as it is system-calculated.



Incident form with Impact and Urgency set to '2 - Medium', and Priority auto-updated to '3 - Moderate'

Step 10: Assign the incident (optional)

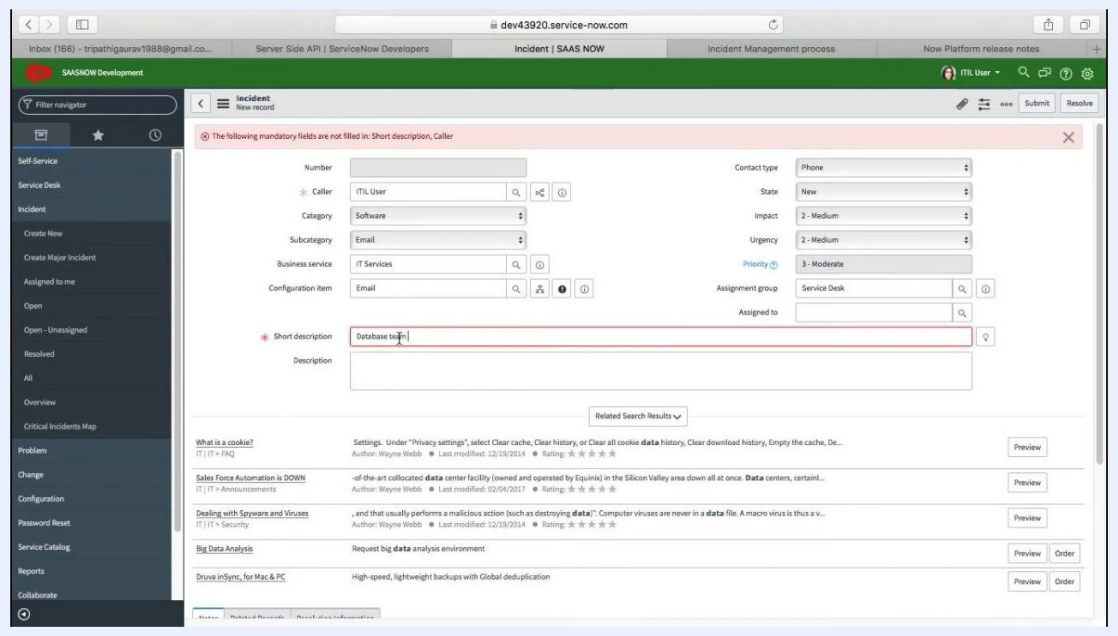
In the Assignment group field, type and select the appropriate group, such as "Service Desk." If you know the specific person to assign the incident to, enter their name in the Assigned to field; otherwise, leave it blank.



Assignment group field being filled in with 'Service Desk'

Step 11: Enter a short description

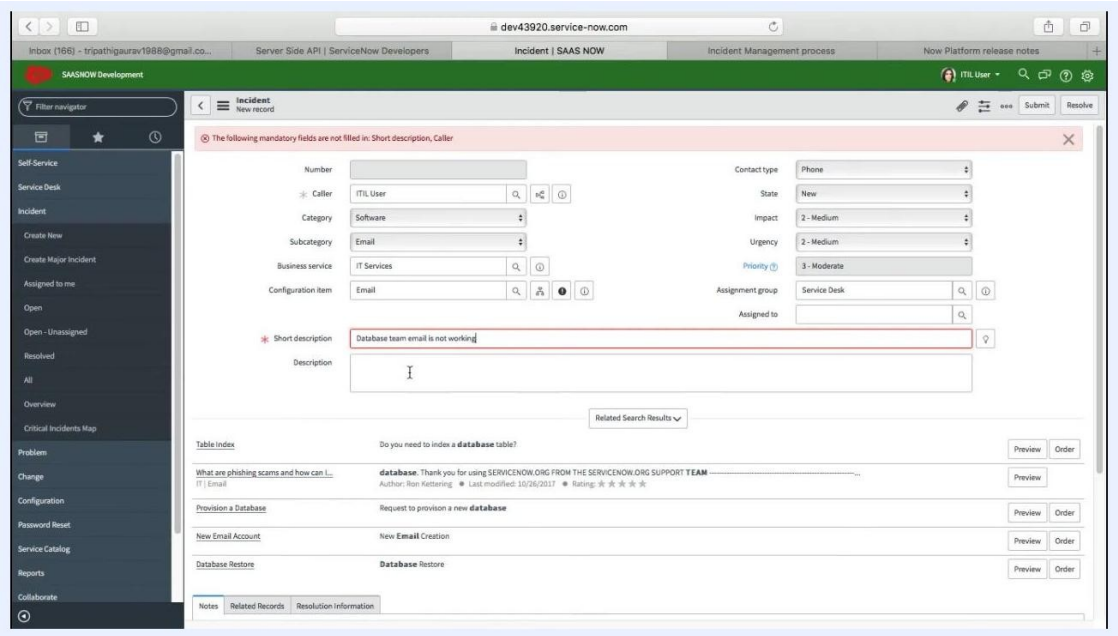
In the Short description field (mandatory), enter a concise summary of the issue. For example: "Database team email is not working."



Short description field filled in with 'Database team email is not working'

Step 12: Provide a detailed description

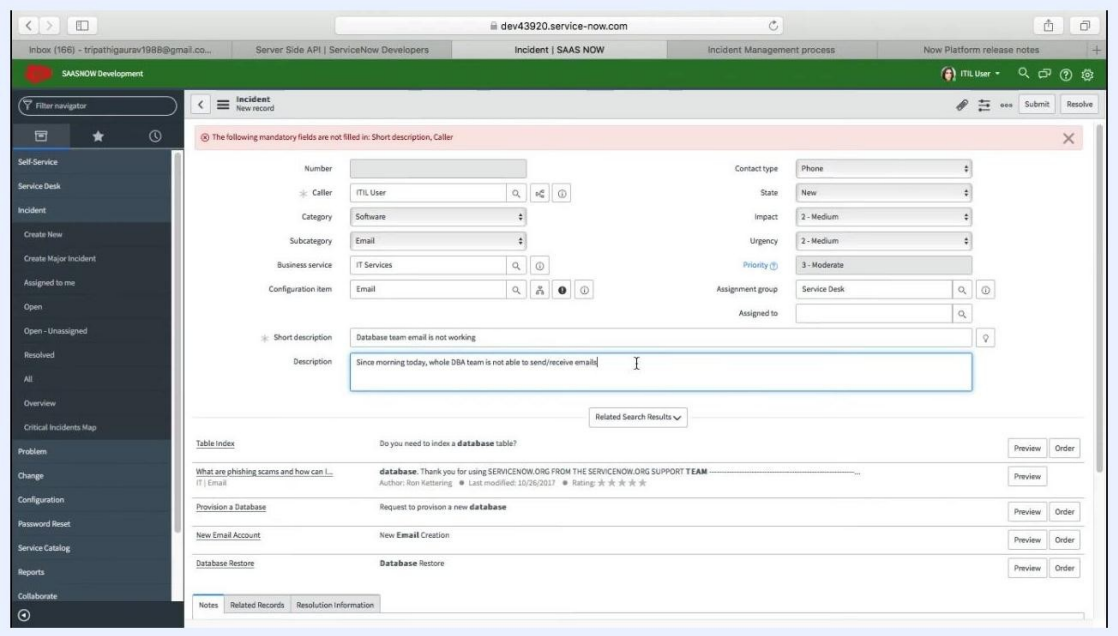
In the Description field, explain the issue in detail, including any error messages or symptoms observed. For example: "Database team is unable to send or receive emails. Error message: 'Unable to connect to mail server.' Issue started this morning and affects all team members."



Description field ready for input, with the short description already filled in

Step 13: Refine the detailed description

Expand on the description with clear details, including the timeframe and affected users. For example: "Since morning today, whole DBA team is not able to send/receive emails."



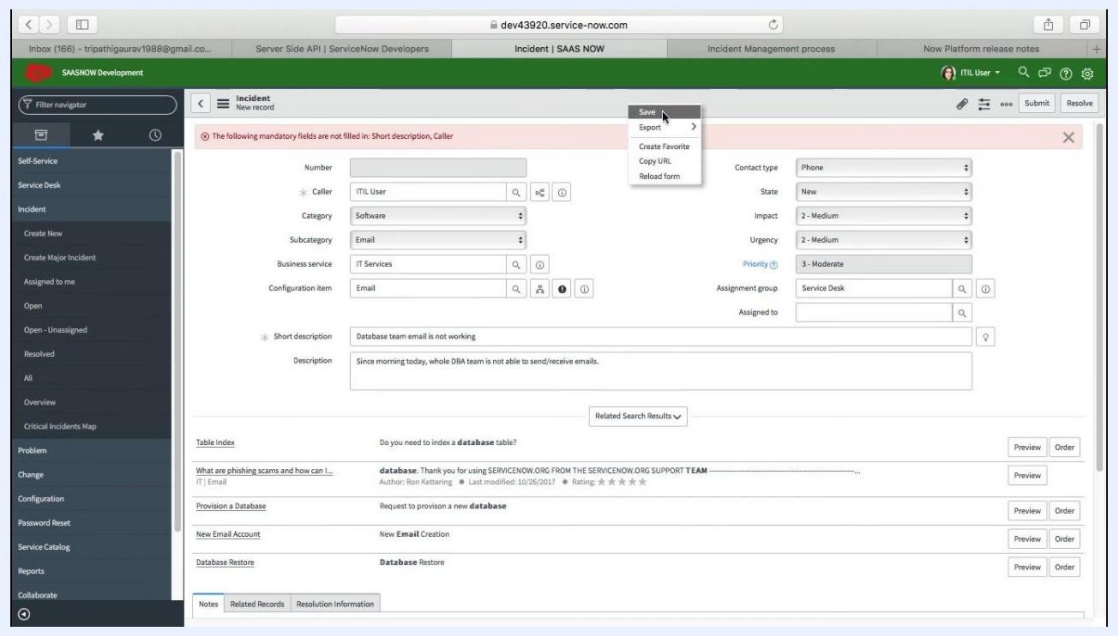
Incident form with the Description field filled in: 'Since morning today, whole DBA team is not able to send/receive emails.'

Step 14: Review related search results

Below the description field, the Related Search Results section automatically searches for knowledge base (KB) articles and solutions related to keywords in your short description, such as "database." Review any suggested articles and preview or order them directly from this section if they help resolve the issue.

Step 15: Save the incident

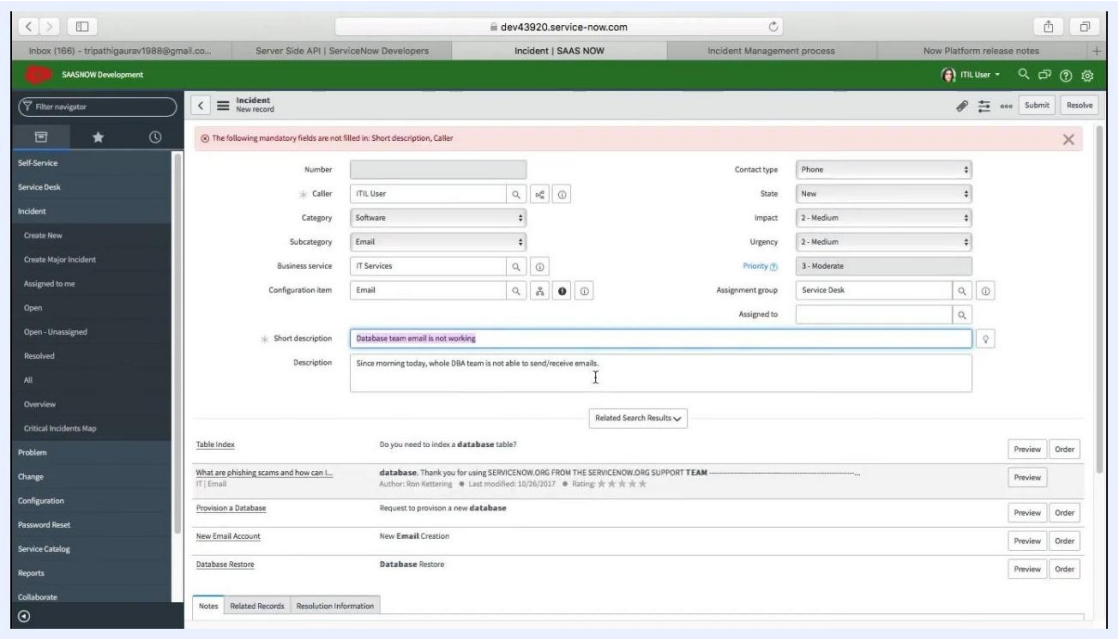
Click the menu icon (three horizontal lines) at the top right of the form, then select Save from the dropdown menu to save the incident record.



User selecting 'Save' from the menu to save the incident form

Step 16: Confirm incident creation

After saving, verify that the system has assigned a unique incident number (for example, "INC0010007") and confirm that the incident is assigned to the correct group, such as "Service Desk." Check that all entered details are correct and visible on the record.



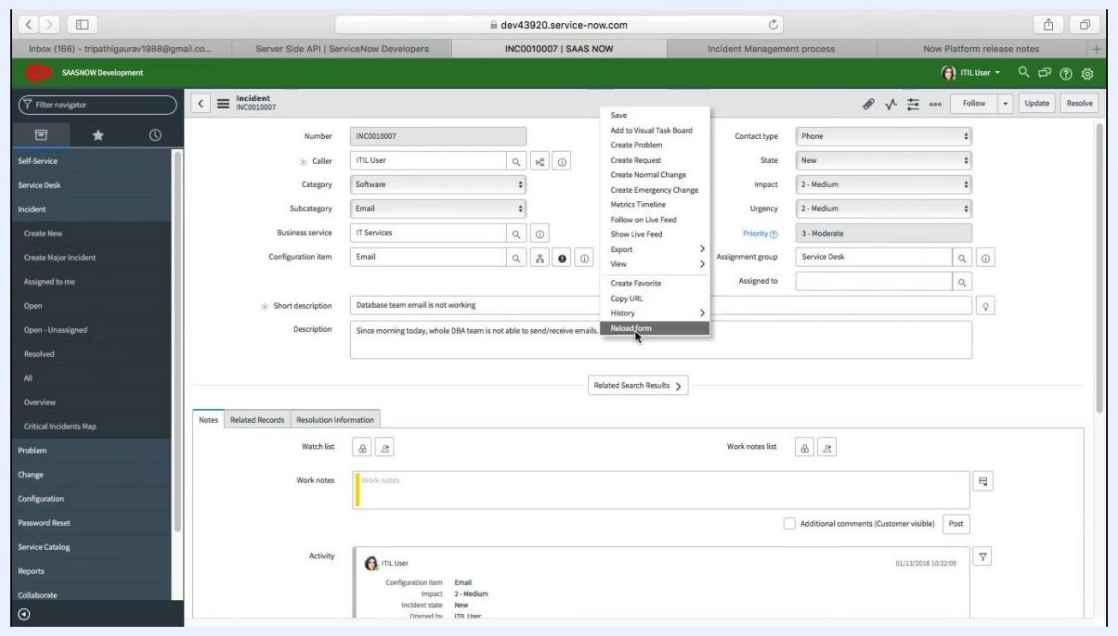
Incident record showing the assigned number INC0010007 and assignment group 'Service Desk'

Step 17: Check for email notification (optional)

Depending on your organization's ServiceNow configuration, check whether the system has sent an email notification regarding the incident creation or assignment.

Step 18: Confirm submission is complete

Your incident is now logged and assigned for resolution. You can follow up or update the incident as needed using the incident number provided.



Final incident record view with all details filled in and the assignment group set

What's next

With your incident submitted, the support team can begin triage using the information you provided. Use the incident number to track progress or add updates as the issue is resolved.