



ZENworks Service Desk 7.5 User Guide

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1 User Guide

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1.1 Welcome

Thank you for choosing our service management solution. Your decision guarantees your service organization’s ability to deliver a comprehensive customer support service that meets, and even exceeds, your customer expectations.

Easy to configure and customize, our service management solution has been developed to offer the very best experience to users via the Web. This all-in-one support solution enables service issues to be readily created, managed, monitored and solved, with minimal impact to your customer's organization, allowing them to focus on their core business.

Your customers have access to a user-friendly portal that offers an easy-to-use Knowledge Base and request tracking system. Your technicians are provided with the tools that allow them to offer effective and efficient service. Supervisors have access to comprehensive management and reporting of the service desk, its technicians and all support issues.

For assistance with set-up and configuration of the application, access the [Configuration Steps](#) section of this guide. The configuration process requires the User to switch between the Administrator Role and Supervisor Role, so in the first instance it is advisable that the person customizing the application have both User Roles and this can be set for their account within the User tab of the Administrator screen.

The User Guides have sections relevant to the various User Roles within the application, including:

- ◆ [Administrator](#)
- ◆ [Supervisor](#)
- ◆ [Technician](#)
- ◆ [Partner](#)
- ◆ [Finance User](#)
- ◆ [Manager](#)
- ◆ [Customer](#).

To start using this User Guide, click on the User Guide link within the Contents tab. Or, to use the step-by-step guide to assist with the application set-up, see [Configuration Steps](#).

Use single clicks within the guide to open topic information.

1.2 What's new

Version 7.0 includes major performance improvements, user interface updates, refinement of existing application features and numerous Customer requests. Following is a summary of 7.0 inclusions. To view a more complete list of new functionality in version 7.0 refer to the Release Notes.

- ◆ [Section 1.2.1, “Request functionality across all Processes,” on page 8](#)
- ◆ [Section 1.2.2, “Service Desk Configuration & Use,” on page 8](#)
- ◆ [Section 1.2.3, “Service Asset & Configuration Management,” on page 8](#)
- ◆ [Section 1.2.4, “Customization and Setup,” on page 9](#)
- ◆ [Section 1.2.5, “Web Services,” on page 9](#)

1.2.1 Request functionality across all Processes

When working with requests, Users will find the following additional functionality:

- ◆ Ability to convert a Service Request to an Incident, and vice versa
- ◆ Customer and Line Manager Approval capability
- ◆ Ability to scroll through lists
- ◆ Request streams automatically updated and available in the Dashboard
- ◆ Visual request type indicators within the Summary Information screen
- ◆ Updated SLA progress bar with percentage displays
- ◆ Ability to limit Quick Call access to a per Team base
- ◆ Problem Teams can be configured to work from a queue.

1.2.2 Service Desk Configuration & Use

Supervisors will find updates in the following parts of the system:

- ◆ New look Dashboard with customizable widgets and automatically updated request streams
- ◆ Ability to set the Dashboard as the User Home tab
- ◆ Capability to synch Calendar events with external calendaring tools
- ◆ Ability to import Knowledge Base content using a .CSV file
- ◆ New look Workflow and Asset Relationship maps
- ◆ Access to Workflow State information via rollover functionality
- ◆ Capability to queue support contracts
- ◆ Access to an extended data model when building reports.

1.2.3 Service Asset & Configuration Management

Enhancements to Service Asset & Configuration Management functionality of v7.0 include:

- ◆ Extended Relationship Map capability including a new look
- ◆ Ability to create Outages that cover multiple Items and trigger Item Status changes
- ◆ FSC dates applied to requests based on Outage windows

- ♦ Enhanced Customer notification capability for Outages
- ♦ Ability to duplicate Item Types.

1.2.4 Customization and Setup

Administrators have access to improved functionality in the following areas:

- ♦ Multiple LDAP sources can be synchronized with the system
- ♦ Ability to configure and automatically send scheduled reports across User Groups
- ♦ Updated Setup screens
- ♦ Ability to set the Subject field to required for Technician Users
- ♦ Capability to set Password Security questions
- ♦ Localization capability has been extended to Team Signatures and Email Messages.

1.2.5 Web Services

The following change has been made to the Web Services functionality:

- ♦ When authenticating via Web Services with LDAP, the Web Service call must specify the authentication source as part of the request.

1.3 Getting Started

- ♦ [Section 1.3.1, “Configuring Your System,” on page 9](#)
- ♦ [Section 1.3.2, “Active Directory Integration,” on page 10](#)
- ♦ [Section 1.3.3, “Configuration Steps,” on page 24](#)
- ♦ [Section 1.3.4, “Setup,” on page 26](#)

1.3.1 Configuring Your System

Before using the service management system, please read the following important recommendations:

Logging In

The system includes a default Supervisor and Administrator account to initially access the application. To log in with the Supervisor account, enter the User name: super, Password: super. This User also has the Administrator Role that allows the User to switch easily between the Administrator and Supervisor interfaces when configuring the system.

Setting the Time Zone

It is strongly recommended that each User set the Time Zone (in the My Account tab) during their initial login. A default Time Zone can also be configured system-wide by the Administrator within the Setup>Privileges>Customer tab.

Browser Buttons

Use the hyperlinks and buttons within the application screens, in preference to the forward and back browser buttons. This ensures the application maintains control of the session and the data is refreshed appropriately.

Active Directory Server Integration

When using Active Directory for User authentication, the server-side User group definitions and subgroups must be of type 'Universal Distribution'. The 'Domain User' group or any other security group cannot be added to any User group. For more information about working with directory servers, see [Active Directory Integration](#) within the Administrator Guide.

Setting Up Billing

If Billing is to be used to manage Contracts, it is recommended that this be enabled before other configuration is set, to prevent system disruptions.

To enable Billing:

1. Login as the Administrator
2. Select the Setup tab
3. Go to the Billing sub-menu option
4. Select Yes for Contracts
5. Complete required information (Refer to the [Setup>Billing](#) section of the Administrator Guide for further information.)
6. Click Save.

Deleting Records

Before you begin to populate the database and use the system, it is important to note that records for Customers, Technicians, Items, Item Types and Knowledge Base Categories or Articles are only disabled within the application when the Delete option is selected. The records are not deleted from the database. This preserves the integrity of your data whilst maintaining audit trails, should they ever be required.

It is strongly advised that records are not manually deleted from the database as this may invalidate existing relationships in the application, and cause the system to crash.

1.3.2 Active Directory Integration

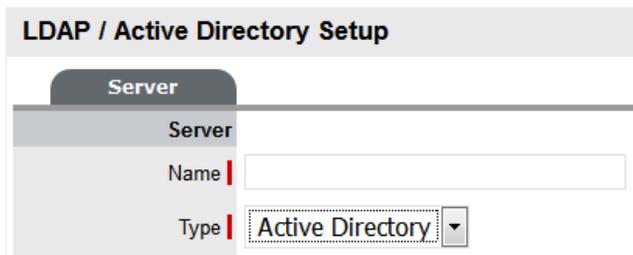
Active Directory Integration

Active Directory is a unique implementation of the LDAP standard, as the requirements for communication need to conform to the Microsoft™ Windows Authentication protocols. To meet this need, it is necessary to enter all domains from which Users will authenticate. Multiple sources of Active Directory can be synchronized with the system, if required.

Configuring the Active Directory Integration

To configure the Active Directory integration:

1. Select Setup>LDAP
2. Click New
The LDAP/Active Directory Server screen tab is displayed.
3. Enter the Server Name
4. Select Active Directory within the Type drop down list



LDAP / Active Directory Setup

Server

Server

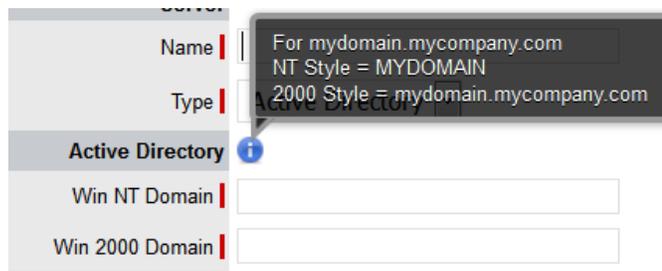
Name |

Type | Active Directory ▾

5. Define all the Domains from which Users will be authenticated

Domains will need to be entered in both NT and Windows 2000 domain naming systems formats. This is because Active Directory conforms to Microsoft™, Windows NT and Windows 2000 authentication protocols.

Make entries with care, as they are not validated against the Directory Server by the system Domain Editor.



Name |

Type |

Active Directory ⓘ

Win NT Domain |

Win 2000 Domain |

For mydomain.mycompany.com
NT Style = MYDOMAIN
2000 Style = mydomain.mycompany.com

- a. Here is an example of both the naming conventions for the domain:
 - b. mydomain.mycompany.com
 - c. NT Style = MYDOMAIN
 - d. 2K Style = mydomain.mycompany.com
6. To import LDAP Groups, select Import Groups and specify Group Admin DN, Password and Group Node/Base DN.
 7. Click Save
 8. Using the drop-down arrow, select the Default Domain, which is used in the following three ways:
 - ◆ on the login page
 - ◆ to authenticate against, when synchronizing with the Directory Server
 - ◆ where the system expects to find the User Groups.
 9. Enter all other required fields to configure the Directory Server

Settings	Description
Security	Determines how the integration layer will authenticate. For Active Directory this should be set to Cleartext– Username + Password. Anonymous connections to Active Directory are rarely enabled.
Server Host	Enter the hostname or IP address of the Active Directory Server. On a Windows NT domain this will be the primary domain controller.
Server Port	The default Active Directory Server Port is 389. This is rarely changed.
Username	Used by the system to authenticate against the Active Directory Server when reading account information. The domain prefix/suffix will be appended, based on the default domain, when connecting to the Server.
Password	Enter the Password for the Username account.
Users Node	<p>The component of the base domain name that refers to the location of the User Groups .For example, if the location of the User Groups is the following:</p> <p>ou=UserGroups, ou=MIS, dc=myoffice, dc=mycompany, dc=com (See LDAP/Active Directory Advanced Settings for information on Group configuration.)</p> <p>Groups must be in the default domain, in this case myoffice.mycompany.com. The Users Node only needs the location of the Groups within the default domain, so the Users Node in this example will be: ou=UserGroups, ou=MIS.</p>
Group Admin Details	<p>Group Admin DN: Specify the group admin DN.</p> <p>Example: cn=user, cn=users, dc=domain, dc=com</p> <p>Password: Specify the password of the DN.</p> <p>Group Node/Group Based DN: If this field is not specified, then it considers the value specified in Users Node/Base DN.</p> <p>NOTE: The above options are enabled only when you select Import Groups check-box in the Groups section.</p>
<i>Locale</i>	
Default Timezone	Select the default Timezone to be applied to all User accounts imported via Active Directory.

10. Click Save.

Repeat the above process to add more than one authentication server for authorizing User access.

Test Button

Test

The Test button creates a connection to the Active Directory Server, applying the configuration settings. If successful, it will attempt to determine how many Users are in each group and display a Results Screen.

NOTE: If the test fails, an error message will display the cause.

Sync Button

Sync

The Sync button runs the synchronization process to import all Users from the Server Directory. If new Active Directory Accounts have been created and those Users require immediate access to the system, a manual synchronization would be used.

Only one synchronization can run at a time. When multiple Users need access, create the accounts, then run a single manual synchronization.

A manual synchronization may take some time as it depends on the connection speed with the external service. The manual synchronization works best for small directories. Larger Active Directory implementations can take some time to propagate the changes, so account information may not be immediately available.

Importing Customers

Customer details can be imported using Active Directory by enabling the option, if required. When the system is setup to synchronize with Active Directory, move to the Setup>Privileges>Customer tab and enable the Include Customers option.

LDAP/AD	
Include Customers	<input checked="" type="radio"/> Yes <input type="radio"/> No
Mixed Mode	<input type="radio"/> Yes <input checked="" type="radio"/> No

If there is a need to create Customers using Active Directory and the system's internal authentication capability, Mixed Mode authentication can also be enabled. After the option to Include Customers is set to Yes in the Customer Privilege tab, the Mixed Mode field is displayed. Set this option to Yes to allow Customers to be created directly in the system and using Active Directory.

Imported Account Usernames

Accounts imported from Active Directory use the UPN as the Username, as opposed to the NT style login. The domain component of the UPN is derived from the selected domain in the popup on the login page, which means Users need to enter their login name only to connect to the support application.

Login details are passed directly to the directory server for authentication and are not retained within the service management system.

LDAP/Active Directory Advanced Settings

LDAP/Active Directory Advanced Settings

Before setting up the LDAP/ADS configuration within the system, the Advanced settings should be revised. The default setup assumes that the User Groups that the system uses to authenticate match what is on the server, and that the User information imported matches the attributes available on the server.

LDAP/Active Directory Advanced Options Set-up

To configure the Advanced options within the LDAP/Active Directory Setup window:

1. Select Setup>Authentication
 - The LDAP /Active Directory Setup screen appears.
2. Click Edit
3. Move to the Advanced tab of the selected Authentication Server

Active Directory Advanced Setup

Server **Advanced** [Revert to defaults](#)

Update Schedule

Interval:

Commencement Time: @

User Groups

Administrator Role:

Supervisor Role:

Technician Role:

Partner Role:

Manager Role:

Finance Role:

Customer Role:

Settings

Include Disable Accounts: Yes No

Include Customers: Yes No

Default Date Style: ⓘ

Attribute Mapping

First Name: Standard Custom

Last Name: Standard Custom

Primary Email: Standard Custom

Email Alias: Standard Custom

Phone: Standard Custom

Mobile: Standard Custom

Fax: Standard Custom

Pager: Standard Custom

Address: Standard Custom

City: Standard Custom

Zip: Standard Custom

Country: Standard Custom

GUID: Standard Custom

Customer Orgs: Yes No

Line Managers: Yes No

4. Enter the relevant details for the fields, as required

Field	Description
<i>Revert to Defaults</i>	<i>Resets</i> the installation defaults.
<i>Update Schedule</i>	<i>Sets</i> a routine synchronization to update the system with current AD/LDAP accounts. Select the required Daily, Weekly or Monthly intervals and Commencement details.
Commencement Time	<i>Set the day of the week and time the system is to start automatically synchronizing with the directory server.</i>
<i>User Groups</i>	<p>Provides imported Users Roles. (The system will look for these groups by default)</p> <p>The User Group names can be customized, only requiring a unique name for each group. The group names on the Directory Server must be identical to the User Group names entered here. Customize or use the default User Group names as necessary.</p> <p>Members of each group will be assigned the appropriate Role within the system. To assign multiple Roles to a User, make sure they are members of each of the required groups. Users can have only one of the Supervisor, Technician or Partner Roles but they can also have any other Role or combination of Roles.</p>
Attribute Mapping	<p>Maps attributes from the directory server to corresponding fields in the system. Native system fields are First Name, Last Name, Email (A unique Email Address must be included for a User account to be created), Phone, Mobile, Pager, Address, City, Zip and Country.</p> <p>NOTE: Mandatory User information for new and existing User accounts include the First Name, Last Name and Email address. If these details are not available, the application will not validate an existing User account and automatically reassign any open or active requests to another valid User.</p> <p><i>Standard:</i> Next to each field is a drop-down menu containing the list of default fields specific to either LDAP or ActiveDirectory server type. For each native name, the default fields are selected. Use the default mapping or select the mapping attribute as required.</p> <p><i>Custom:</i> Select the Custom option to manually enter an Attribute Field.</p>

Field	Description
GUID	Global Unique Identifier For ADS select objectGUID For OpenLDAP select entryUUID For eDirectory select GUID.
LDAP User fields/ Mixed Mode User Fields	The LDAP User field headings will be replaced with any custom LDAP/ADS Accounts fields created by the Administrator in Setup>Custom Fields (See Custom Fields .), or Mixed Mode User Fields if the Mixed Mode option is enabled in the Server tab. Use the drop-down list to select the appropriate mapping to the matching directory server field or select Custom to manually enter a Field.
Customer Orgs	Organizational Unit relationships can also be mapped from the authentication server. By default this is not enabled. To activate Customer Organizational Unit mapping, select Yes for the Import Customer Organizational Units option and define where the Company and Department information is to be derived.
Line Managers	LDAP attribute that defines a Customer's line manager, which is used for processing approvals on Service and Change Requests. Only system users with the Customer Role can be assigned as Line Managers.

5. Click Save.

Mapping Fields to the Matching Directory Server Field

The LDAP User field headings will be replaced with any custom LDAP/ADS fields created by the Administrator in Setup>Custom Fields. See [Custom Fields](#). Use the drop-down list to select the appropriate mapping to the matching directory server field or select Custom to manually enter a Field.

User details are imported when synchronization with the Active Directory/LDAP server takes place. Imported fields cannot be modified through the service management tool directly, the appropriate authentication server console must be used.

Import Customer Org Units

Organizational Unit relationships can also be mapped from the authentication server. By default this is not enabled. To activate Customer Organizational Unit mapping, select Yes for the Import Customer Organizational Units option.

Customer Orgs	<input checked="" type="radio"/> Yes <input type="radio"/> No
Company	<input checked="" type="radio"/> Standard <input type="radio"/> Custom
	company
Department	<input checked="" type="radio"/> Standard <input type="radio"/> Custom
	department

NOTE: The details of the Org. Units are not populated upon this synch, only the Org. Unit names.

For the Org. Unit details to be assigned to Customer or User Information, create the Org. Unit in the Supervisor>User>Organizational Units tab and ensure the Org. Unit name is identical to what is stored in the authentication server. If the details are not identical, the system will create another Org. Unit.

Billing

The Billing module allows Users to create Invoices, Purchase Orders and manage Customer support Contracts. Billing allows support organizations to charge Customers for support services provided, and manage Items purchased with Service Contracts.

When the Billing module is enabled by the system administrator, the Invoices and Purchase Orders sub-menu options are available within the application Finance tab. Purchase orders can simplify the tracking of where and when new Items are purchased or leased. This feature is not meant to replace an organization's original PO system, it is designed to easily link a specific PO number (and its associated vendor and date information) with an Item.

The Invoices section allows Customers to be billed for products (Items) or support services (Contracts) provided by the organization. An Invoice can be created when an Item and Service Contract is ordered by a Customer. Alternatively, Invoices can be created for Service Contracts alone, as the Item may already exist in the system.

Invoices can be generated through the following screens:

- ◆ Within the Invoices section
- ◆ When a request is created against an out-of-contract Item
- ◆ When an Item, Customer or Organizational Unit is created, or edited to assign a new SLA.

The Billing options include:

- ◆ [Purchase Orders](#)
- ◆ [Contracts](#)
- ◆ [Invoices.](#)

Billing	Description
Purchase Orders	Allow Users to track Items from the moment an order is placed to its delivery and implementation. POs cover leased and purchased Items.
Contracts	Within Contracts, Users can manage Customer Service agreements over a specific time period.

Billing	Description
Invoices	Allow Users to charge Customers for contracts. When Invoices are activated, Contracts are automatically enabled
Display SLA Prices	Enables SLA Price fields to be visible in the SLA Editor screen. This allows the Supervisor to allocate costs to SLAs and assists with the calculation of Break Even Point costs for Service Items. See: SLAs .
Email Notifications	(This option is visible when Contracts are enabled.) Enables the system to update Finance Users via automated emails, regarding Invoice and/or Contract related matters.
Global Settings	
Currency	Defines the currency that is to be automatically applied by the system for all financial transactions.

NOTE: Invoices and Contracts will not work when Global Items are in use. If Billing is enabled after the application has been in use, a Supervisor will need to assign owners to Global Items before Billing can be activated.

Purchase Orders

Purchase Orders

Purchase Orders can simplify the tracking of where and when new Items are purchased or leased. This feature is not meant to replace an organization's original PO system, it is designed to easily link a specific PO number (and its associated vendor and date information) with an Item.

Enabling Purchase Orders

To enable Purchase Orders:

1. Select Setup>Billing
2. Set the option Enable Purchase Orders to Yes

Billing

Setup **Contracts**

Billing Module

Enable Purchase Orders Yes No

Enable Contracts Yes No

Enable Invoices Yes No

Display SLA Prices Yes No

Tax Rate (Percentage)

Email Notifications Enabled Disabled

Purchase Order Company Details

Global Settings

Currency

Save

3. Set the default tax rate
The percentage amount entered here is applied by default to all POs.
4. Enter the Company Details to be used on the PO
5. In Global Settings, select the preferred currency
6. Click Save.

NOTE: A logo can be applied to system generated POs by adding the graphic within the [Setup>Customize](#) tab. (This option is only displayed when the Purchase Orders functionality is enabled within the Setup>Billing tab.)

The Purchase Order sub-menu option is made available within the Finance tab for Finance, Supervisor and Technician Users, when enabled.

Contracts

A Contract is made up of a Service Level Agreement (SLA) and a Service Delivery Period (start and end time). They can be used to manage an entitlement to service from a start date, through to an end date.

Contracts and Invoices are used together when the Service Desk needs to charge its Customers for any support provided. Billing within the system is on a per Contract basis, and is enabled automatically when Invoices are activated.

Contracts can be created for different elements to suit organizational needs. Contracts can cover the individual elements:

- ◆ Items
- ◆ Customers
- ◆ Organizational Units
- ◆ Requests.

Pending Contracts are contracts that have a start date set in the future. They automatically become active on the contract start date or can be enabled manually.

Enabling Contracts

To enable a Contract:

1. Select Setup>Billing
2. Click Yes to enable Contracts
A Contracts tab will be visible.

The screenshot shows the 'Billing' setup window with the 'Contracts' tab selected. The 'Billing Module' section includes five toggle options: 'Enable Purchase Orders' (Yes/No), 'Enable Contracts' (Yes/No), 'Enable Invoices' (Yes/No), 'Display SLA Prices' (Yes/No), and 'Email Notifications' (Enabled/Disabled). The 'Global Settings' section includes a 'Currency' dropdown menu set to 'United States Dollar'. A 'Save' button is located at the bottom right.

Section	Option	Value
Billing Module	Enable Purchase Orders	Yes
	Enable Contracts	Yes
	Enable Invoices	Yes
	Display SLA Prices	Yes
	Email Notifications	Enabled
Global Settings	Currency	United States Dollar

3. Define the Email Notifications option for Finance Users
When enabled, automated emails are sent to Finance Users regarding matters relating to POs, Invoices and/or Contracts.
4. Set the Currency for all financial transactions managed by the system
5. Move to the Contracts tab to define parameters for Contracts

Billing

Setup
Contracts

Subscription

Contract Renewal Time days

Default Contract Duration months

Time

Low Time Alert Yes No

Threshold % Elapsed

Low Time Email Yes No

Threshold % Elapsed

Expiration

Time Expired Complete Request Purchase Time

Overtime Rollover Ignore

Save

Options	Description
Subscription	
Contract Renewal Time	<p>The system can automatically send a Contract Renewal Invoice before a contract expires. Enter the number of days prior to the contract expiration date for the system to send the renewal invoice.</p> <p>For Contracts not to be automatically created, leave this field blank.</p> <p>(The information for the invoice can be configured in the InvoiceSummary link within the Setup>Email>Templates>Email Summary Templates filter screen. This template is sent with the InvoicePrefix email that can be edited in Setup>Email>Templates>Full Email Templates list.)</p>
Default Contract Duration	<p>The system sets the default contract renewal period to 12 months, adjust or delete the entry as required.</p>
Time	
Low Time Alert	<p>The system can automatically create an alert within the Customer Portal for customers that have Time-based contracts (i.e., purchased a quantity of support hours.) The Alert can be sent based on the percentage of hours that have been used.</p>

Options	Description
Low Time Email	<p>The system can automatically send an email to a Customer that is getting close to using all their support hours in their Time-based contracts. The Email can be sent based on the percentage of hours that have been used.</p> <p>The Email content is set in the ContractTimeLow option of Setup>Email>Templates.</p>
Expiration	
Time Expired	<p>When a Customer's contract is expired when a User is working on a request, this option specifies if the User can Complete the request although the Contract has expired and if the system will lock out the User until the Customer has purchased additional time.</p> <p>When Complete Request is selected, the following options are displayed:</p> <ul style="list-style-type: none"> ◆ Rollover - means the time used to resolve the issue will be subtracted from the Customer's renewed contract. ◆ Ignore - means the time used to resolve the issue, although the Customer contract has expired, is not allocated to a future contract. <p>(The subject line and content for the automated emails sent on contract expiration is configured in the ContractTimeElapsed and ContractTimeElapsed of Setup>Email>Templates.)</p>

- Enter the Contract Renewal Time, if required
For contracts not to be automatically created, leave this field blank.
- Set Notifications and Thresholds
- Set Time Expired option

Expiration	
Time Expired	<input checked="" type="radio"/> Complete Request <input type="radio"/> Purchase Time
Overtime	<input type="radio"/> Rollover <input checked="" type="radio"/> Ignore

- Click Save.

1.3.3 Configuration Steps

These configuration steps are recommended as a guide to assist with customizing the application to suit the service environment. These steps are what is required at a minimum to enable your system. It should be noted that these steps require access to the Administrator and Supervisor views.

The following procedure covers editing the logged in User account details and ensuring this User has all the relevant privileges to achieve what is required to configure the system. It then details the steps to enable the system to work with Email, setting the privileges for how Customers and Technicians can interact with the system, and how requests and the system will behave. This is defined within the Setup>Privileges tabs.

The User then has the option to customize the look and feel of the system, although this can be done later, if preferred. The next step is to create Customers and Users in the system.

Moving to the Supervisor Role, the User then configures the day-to-day elements within the application, which are part of creating and managing requests. This includes setting the timeframes for managing requests and defining trigger points for escalations by configuring SLAs; detailing the steps a request will move through, by customizing Workflows, which includes setting the stages of the Workflow where timers will trigger automatic warnings and escalations; defining the Team(s) of Technicians who will be associated with the customized Workflows and SLAs.

With the basic elements in the system now in place, the User then moves to the Configuration tab to customize the Configuration Management Database (CMDB). This part is often considered the most complex part of configuring the system, as this is where the service environment, including physical and service Items, is mapped into the system with associated relationships. When designing the CMDB, first the templates for all the different Item Categories are created. These are refined as Item Type templates, with these two templates used to define the information recorded against each Item and classification of issues that can be associated with each Item when requests are logged by Customers.

After the CMDB structure is defined, Items are imported via AMIE or .csv file. This is when the Items are associated with Customers or Organizational Units, who can log requests against the assigned Items.

In the *Administrator* (Setup) view:

1. Customize the default Supervisor access

Include Incident, Service Level Management and if applicable, Request Fulfillment, Problem and Change Management. Adjust the User Timezone, if applicable. (See: [User](#))

2. Configure Email Setup and Email Messages (See:[Setup>Email](#))

This step allows the system to manage requests via email. After completing the information in the Server and Setup tabs, the content for automated emails sent by this system can be customized. This does not have to be all done at this point, however, it is suggested that within the last page of the Templates tab, the Signature be updated to reflect the service organization name.

3. Enable System Privileges (See: [Setup>Privileges](#))

At this stage, it is suggested that each option be reviewed in the [User](#), [Customer](#), [Request](#) and [System](#) tabs within the Privileges sub-menu option. Although it should be noted, these can be adjusted in the future. If you are unsure about what an option refers to, select the Help button on the system UI, to display the relevant page of the User Guide. Be sure to set the appropriate Time Zone within the Customers Privilege tab, as this needs to be set before importing Customers and Users via an authentication server to ensure it is set correctly on all newly created accounts.

4. Customize Banners and Welcome Page Message (See:[Setup>Customize](#))

This can be done now if the images are available. Alternatively, return to this step at a later stage.

5. Create Customers and Users, which include Supervisor, Technician and Partner accounts

Note, to associate Organizational Unit information with Customers or Users, this can be configured at this point within the Supervisor>User>[Organizational Unit](#) tab. Should the import include the name of the Org Unit that matches what is recorded in the system, the details from the information recorded internally will be applied to the Customer or User.

If using an authentication server, move to the Setup>Authentication tab.(See:[Setup>Authentication](#);[Active Directory Integration](#) or [LDAP Integration](#))

If creating accounts directly in the system (i.e., using internal authentication), go to the User tab. (See: [Customers](#) and [Users](#).)

6. Set up Service Level Agreements (See: [Service Level Management](#))

Move to the *Supervisor view* by clicking the User link, next to the logged in User Name.

If these are unknown at this time, the system includes a default SLA that can be used.

7. If applicable, create Operational Level Agreements and/or Underpinning Contracts (See: [OLAs](#) or [UCs](#))

This is more than likely an advanced system configuration step at this point, or may not be relevant to the service organization. However, if OLAs or UCs are in place in the service organization, they can be mapped into the system now. Alternatively, they may be added later.

8. Customize or create Workflows (See: [Incident & Problem Workflows](#) and [Service Request & Change Workflows](#))

The system includes default Workflows across all Processes. At this point, the default Workflows may be sufficient, or they can be customized to suit the service organization requirements. Alternatively, new Workflows can be created from scratch.

9. Create Teams (See: [Teams](#))

By default the system includes one Process Team and the Unknown Team. Edit the existing Process Team, including defining the way it works, assigning the relevant Technicians, associating the Workflows that the Team will support, and setting the Technicians to work in the appropriate Escalation Layer(s). Teams are to be created for all Processes that are to be managed by the system (i.e., Incident, Problem, Change, Service Request.), although it may be relevant to finish one Process first, and return to do the other Processes at a later date.

10. Assign Default Teams and SLAs within Request Privileges (See: [Setup>Privileges>Requests](#))

Move to *Administrator view* by clicking the Setup link, next to the logged in User Name

These settings will be applied to all newly created Items and Item Types that result from an AMIE import.

11. Configure the CMDB, by first customizing Configuration Categories:

Return to the *Supervisor view* by clicking the User link, next to the logged in User Name.

The system includes a number of default Categories, which should be more than enough for most organizations. Within the Category, the attributes of an Item that are to be recorded in the system, are defined by customizing the field labels. The stages that an Item can move through in its lifecycle are defined within the Life Cycle tab (i.e., Installed>Pending Configuration>Pending Test,etc). The types of issues reported against an Item are then created in the Classifications tab.

Configure the Category Details Fields (See: [Configuration Categories](#))

Define the Category's Life Cycle (See: [Category Life Cycle](#))

Create Category Classifications (See: [Category Classifications](#))

12. Create Service Type templates and Service Items

For service organizations wanting to fast-track the capability to manage requests in the system, it is advised to create Service Items in the [Service Catalog](#) to allow Customers and Technicians to log and manage requests within the application. Create a Type using the Service Category for each Service being offered, then create the Service Item with the newly created Type template. For the Service to be available in the Catalog, be sure the Service Item status is set to an Active, non Pre-production State. If the Customers are to access a Service on the Customer Portal, the Service Item Lifecycle State should also be set to Customer Visible.

13. Create Item Types (See: [Item Types](#))

If the Types are not to be automatically created as part of an AMIE or .csv import, this is done in the Configuration>Types tab. This is where the Category template is associated with the Type template, the default Teams and SLA are set, and the Classifications for issues reported against Items are refined.

If Items are to be imported via a .csv file or AMIE proceed to Step 14.

14. Within the *Admin>Setup* tab, complete the Item Import (See: [AMIE Import](#) or [CSV Import](#)).

After the Items are successfully imported, a Supervisor User will need to refine the Type templates created as part of the import, if the default settings do not apply to a newly created Item Type. This task does not need to be completed immediately, and can be done on an ad hoc basis (i.e., whenever a Type template is opened in Edit mode, before saving, the system will prompt the User to set any required information.)

15. Within the *Supervisor>Configuration* tab, create Items. (See: [Items](#))

If Items are to be created directly within the system, this is completed in the Configuration>Items tab. An Item Type template is selected for the new Item, which applies all the default information set within the Categories and Types tabs, then ownership of the Item is assigned to the new Item. Ownership can be Everyone (i.e., a Global Item), one or more specific Customers or Organizational Units. The specific attributes of the Item are recorded in the Details tab, and any relationships with other Items in the system can be created within the Relationships tab, now or at some point in the future.

Items can be mapped to Services, if required. (See: [Service Catalog](#).)

Implementing the Processes

For information and steps for implementing for the following Processes, refer to:

- ♦ [Request Fulfillment](#)
- ♦ [Incident Management](#)
- ♦ [Problem Management](#)
- ♦ [Change Management](#)
- ♦ [Release & Deployment Management](#).

1.3.4 Setup

Setup

The Email Setup tab allows the Administrator to define the behavior of the email polling functionality.

To set the email functionality details:

1. Select Setup >Email > Setup

Email

Server Setup Templates SMS Log

General Settings

Email Polling Yes No

Include Banner Yes No

Copy Type CC BCC

Requests

Create/Update via Email (Uses Team emails aliased to this account)

Notify Alternate Team Yes No

Self Mail Yes No

Include Request Status Yes No

Include Request Priority Yes No

Include Request Subject Yes No

Notes

Parse Instance Prefix Yes No

Default Recipients Customers Technicians

Default Locale English

Save

2. Define the settings in line with your organizational requirements:

General Settings

Email Polling	<p>Enable Email Polling to allow the application to check for new email received in the mailbox on the incoming server defined within the Server tab.</p> <p>For new messages that are received, the system will send a message to the sender acknowledging their message. System generated messages are customized within the Setup>Email>Templates tab.</p> <p>NOTE: This option will be locked down if the Create via Email option is selected.</p>
Interval	<p>Enter the time period the system will use to check the incoming server for any messages sent to the support system.</p>
Include Banner	<p>Select Yes to include a banner within emails sent from the system.</p> <p>The banner will be derived from: Setup>Customize>Setup>Public Banner.</p>
Email Errors	<p>When enabled, details of any system errors occurring while the application is running will be sent to the development lab.</p>
Copy Type	<p>For emails sent within requests, define if the Technician is to be copied or blind copied the correspondence.</p>
Requests	
Create/Update via Email	<p>Select this option to enable requests to be created from emails addressed to the support system and Team addresses aliased on the email server. (See: Email Polling.)</p> <p>NOTE: Email Polling will be locked down to Yes when this option is selected and the Accept Anonymous option is displayed.</p>
Accept Anonymous	<p>When enabled, the system will create requests from emails received from email addresses that do not exist in the application's database. (Refer below for more information regarding this setting.)</p>
Notify Alternate Team	<p>When enabled, and if there is more than one Team created for a Process, within the Summary tab of a request the Alternate Team field is displayed. Members of the Alternate Team will be notified relative to the settings defined for the Current Team, and for New Notes, if Technicians is selected in the New Notes screen.</p>
Self Mail	<p>When set to Yes, new Notes created by a Technician or Customer are also sent to them when they save the Note.</p>

General Settings

Include Request Status	When enabled, the system will include the request Status within the Email Subject line of any correspondence sent from the system, regarding a request.
Include Request Priority	When enabled, the system will include the request Priority within the Email Subject line of any correspondence sent from the system, regarding a request.
Include Request Subject	When enabled, the system will include the content from the Subject line of a request within the Email Subject line of any correspondence sent from the system, regarding a request.
Notes	
Parse Instance Prefix	The Instance prefix is used to process email correspondence from multiple instances. If this is not required, set the option to No.
Default Recipients	Within the new Notes editor of requests, the default email settings can be defined for the recipient groups. Define the groups who are more likely to be sent every New Note created related to a request.
Default Locale	Set the default language file to be used for email correspondence. The option set is applied to the Email Locale field in the Customer and User Information screens and can adjusted on a per account basis, as required. NOTE: The content for automated emails sent from the system for languages other than English, is defined within the Localization>Content tab.

3. Click Save.

Receiving emails from anonymous email addresses

When the Accept Anonymous option is enabled, the system will create requests from emails received from email addresses not recorded in the application. This process is managed by the System User being assigned as the Customer, and the original sender being added to the email address list, in the Notify section.

It should be noted, that enabling this option increases the likelihood of spam emails being converted into unwanted requests in the system. Email administrators should ensure that spam filtering is performed prior to the request being received in the inbox polled by the application. It is not the function of the service management tool to monitor, parse or filter emails prior to the creation of records based on the contents of the target inbox.

System Privileges

The System Privileges screen allows an Administrator to control the following options:

- ◆ Knowledge Base
- ◆ Surveys

- ◆ Forums
- ◆ Chat
- ◆ Outages
- ◆ Other general settings.

Enable System Privileges

To enable System Privileges:

1. Select Setup>Privileges>System

The System Privileges tab is displayed.

Privileges

User	Customer	Requests	System
General Settings			
Host Address	<input type="text"/>		
Edit Item Numbers	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	
Public Knowledge Base	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	
Public Surveys	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	
Public Alerts	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	
Public Requests	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	
Passwords	<input type="checkbox"/> Random	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> Manual
Password Questions	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	
Session Timeout	<input type="text" value="30"/> <input type="button" value="v"/>	(minutes)	
Terminate Active Session	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	
Default Name Pattern	<input type="text" value="[First name] [Last name]"/> <input type="button" value="v"/>		
Outbound Web Services	<input type="checkbox"/> On	<input checked="" type="checkbox"/> Off	
OpenID Provider	<input type="checkbox"/> On	<input checked="" type="checkbox"/> Off	
OpenID Consumer	<input type="checkbox"/> On	<input checked="" type="checkbox"/> Off	
ZENworks Integration Options			
Enable ZENworks Integration	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	
Forum Options			
Use Forums	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	
Default Sort Order	<input checked="" type="checkbox"/> Ascending	<input type="checkbox"/> Descending	
Public Forums	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	
Chat Options			
Enable Chat	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	
Outages Options			
Planned Outages Page	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	
Outages Page	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	
Minimum Criticality	<input type="text" value="Low"/> <input type="button" value="v"/>		
Show Affected Relationships	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	
Show Affected Users	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	
Show Inactive Items	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	
Show Change Requests	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	
Search Outages	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	
KBA Review Options			

Customer Privileges	Description
Host Address	To be completed with details of the machine hosting the application, if required.
Edit Item Numbers	Allows users to edit the identification number of an Item.
Public Knowledge Base	Allows access to the Public Knowledge Base on the Login Page.
Public Surveys	Provides access to Public Surveys on the Login Page.
Public Alerts	Alerts with the visibility defined as "Everyone" will be made available on the Login Page.
Passwords	<p>When LDAP or Active Directory Authorization is not used internal authentication is used. To define the password type to be used by the system select:</p> <p><i>Random:</i> the system will generate a random string whenever a password is reset.</p> <p><i>Email:</i> The Users Email Address will be used as the password.</p> <p><i>Manual:</i> Allows the User to manually create a password.</p>
Password Questions	Enables the ability to set security questions within the My Account screen for Customers and Users, which are referenced when resetting or re-sending login credentials.
Session Timeout	<p>The number of minutes the system waits before terminating idle sessions.</p> <p>NOTE: Ensure that the session timeout on the server hosting the application, is equal to or greater than the Timeout option defined in the System Privileges.</p>
Terminate Active Session	When enabled, if a User attempts to log into the system when they already have an active session, they will be prompted to end the active session to allow for the new login.
Default Name Pattern	Select the order for names being displayed in the system, when the First and Last Name are shown together on a screen.
Outbound Web Services	When enabled, request Workflow States and Item Lifecycle States can be assigned a 'listener', which allows these details to be updated in external systems. (Refer to the Extend section of the LiveTime website for details on how to develop a listener.)

Customer Privileges	Description
OpenID Provider	<p>Enables the system to function as an OpenID Provider for User authentication across network resources, as the user authentication source.</p> <p>The OpenIDProvider URL should be:</p> <p><PROTOCOL>://<SERVER>/LiveTime/WebObjects/LiveTime.woa/wa/providerLookup</p> <p>The Protocol should be set to http or https and the server details should include where the system is hosted.</p>
OpenID Consumer	<p>Enables the system to delegate authentication of Users and/or Customers to one or more OpenID Providers (i.e., Google, Yahoo). OpenID Providers that are to be used as delegates are configured in the Setup>Authentication>Social tab.</p>
Forum Options	
Use Forums	<p>This option enables and disables all Forums within the system.</p>
Default Sort Order	<p>Sets the default Forum Topic sort order to either ascending or descending.</p>
Public Forums	<p>This option enables Public Forums to be viewed from the login page and does not require an account to view.</p>
Chat Options	
Enable Chat	<p>Select 'Yes' to activate Chat facility within the application.</p>
Chat Request Assignment	<p>Set to Technician if Customers are to be restricted to chatting only with the Technician assigned to their Request. Set to 'Team' to allow Customers to chat with any member of the Team assigned to their request.</p>
Default Technician Availability	<p>Sets the default availability for chat status in newly created Technician Account information screens.</p>
Outages Options	
Planned Outages Page	<p>A link to the Planned Outages page is displayed on the Login Screen. Outages can be set within Configuration Item properties to schedule when the item will be off-line.</p>
Outages Page	<p>A link to the Outages Page is displayed on the Login Screen.</p>
Minimum Criticality	<p>Defines the Minimum Criticality required for Items to be displayed on the Outages pages.</p>
Show Affected Relationships	<p>Enables Item from the Outages page to show the Item's Relationships.</p>

Customer Privileges	Description
Show Affected Users	Allows Item owner's details to be displayed on the Outages page.
Show Inactive Items	Displays inactive Items on the Outages page. An inactive Item is an Item that is currently not in use by the organization.
Show Change Requests	Allows Customers to view Change Requests related to Outages displayed in the Customer Portal.
Search Outages	Enables Outages to be searched using the Customer email addresses or Item number.
KBA Review Options	
Review KBA	When enabled a Review date field is displayed in the KBA Information screen. The default number of days between reviewing KBAs should be set and the number of days before the review date for an Alert Reminder, should also be entered.

2. Click Yes to enable, or No to disable a Privilege option
3. Click Save.

NOTE: Note: All Outages options apply to Service Manager only.

Re-Index Button



Re-index

The Re-Index button at the base of the System Privileges page is used to re-build the system index. If the search engine appears to be failing text searches, this process will re-create the index. The indexing rebuild runs as a background process.

The following content and attachments is re-indexed:

- ◆ Knowledge Base
- ◆ Forums
- ◆ All requests
- ◆ Items.

User Privileges

Within the User tab, privileges for Users with the Technician and Partner Role can be configured by customizing the options within the Technicians options list. This also includes enabling functionality related to all User work hours and public holidays. Defaults can also be adjusted for Users across the Knowledge Management and Configuration Management processes.

Specific to Technician Users, the following privileges include the ability to:

- ◆ Create new Customers
- ◆ Create new Items

- ◆ Reassign requests
- ◆ Edit other Technicians' requests
- ◆ Create, edit, publish and delete Knowledge Base Articles by default.

NOTE: Privileges assigned to the Technician Role are also applied to the [Partner Role](#).

Enabling User Privileges

To configure User Privileges:

1. Select Setup>Privileges

The User tab is displayed.

Privileges

User	Customer	Requests	System
Technicians			
Create Customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
View All Requests	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Add Notes to Any Request	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Reassign Requests	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Duplicate Requests	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Update Closed Requests	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Search All Items	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Subject Required	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Technician Alerts	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Assignment Control	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Edit Customer Partner	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Create Outage	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Create Quick Request	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Force Analysis	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Work Hours			
Define Work Hours	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Scheduled Vacations	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Vacation Reassign	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Login during Vacation	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Observe Public Holidays	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Configuration			
Supervisors	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Technicians	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partners	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Finances	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Knowledge			
Supervisors	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Technicians	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partners	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Managers	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

User Privileges

Technicians

Create Customers	Allows Technicians to create Customer Accounts.
Reassign Requests	Allows Technicians to reassign requests to another Technician within the same Team. When disabled, requests can only be reassigned through Escalation or changing the status of the request by the Supervisor.
Duplicate Requests	Allows Technicians to copy requests to fast track request creation. Supervisors have this privilege by default.
Manual Request Time	Disables the timer that automatically monitors and records the time when a request is in Edit Mode. NOTE: This option is not available when Contracts are enabled in the Setup>Billing tab, as time worked on a request must be added to Notes manually by Users.
View All Requests	Allows Technicians to view all the requests, regardless of Team assignment, logged in the system for the Processes they are assigned. It also allows Technicians to edit requests that are assigned to fellow Team members.
Update Closed Requests	Set to Yes to enable Technicians to add Notes to requests that are assigned a Workflow Exit State.
Search All Items	Within the Items tab of a request, the All Items option is displayed in the Find Item box for Technician Users, if this option is enabled.
Include Globals Default	By enabling this option, the "Include Global* Options" is ticked by default in the Find Item field, when a User is creating a request.
Subject Required	To make the completion of the Subject field mandatory for Users during the request creation process, set the option to Yes.
Technician Alerts	Allows Technicians to create system Alerts.
Define Work Hours	Allows the Technician's availability to be configured within the Users>Schedule tab. This ensures that Requests are only forwarded to the User during the Defined Work hours, unless there are no other Users available. *If this option is enabled, the Users Work Hours must be defined for each User, otherwise the built-in technician assignment logic will be ignored and all new requests will be assigned to the Team Lead.

User Privileges

Assignment Control	When enabled provides the Assignment option within the User Information screen. This allows a Supervisor or Administrator to turn request assignment off for a User who is available in the system.
Scheduled Vacations	Allows leave to be scheduled for Users, within the Users>Schedule tab. This allows vacations to be planned and automatically detected by the System when the User commences leave. The System will not assign the User new Requests when they are on vacation.
Vacation Reassign	This option becomes available when the 'Schedule Vacations' option is active. When enabled, this option ensures active requests of the User commencing leave are automatically re-assigned to available Technicians within the User's Team.
Observe Public Holidays	This option ensures the System gives consideration to public holidays when calculating SLA times, escalations and breaches. NOTE: When enabled, the Public Holidays sub-menu option is visible within the Admin>Localization>Holidays tab.
Edit Customer Partner	Allows Customers to be assigned to Partners within the Customer Information tab.
Create Outage	Enables a Technician to create outages for Items.
Force Analysis	The system will propose relevant Solutions within the Analysis tab, during the request creation process.
Configuration	
Roles	Set the default privileges for the User Roles' ability to create, edit and delete Item information in the CMDB.
Knowledge	
Roles	Configure the default Knowledge Base authoring permissions for each User Role.

2. Click Yes to enable, or No to disable a Privilege option
3. Click Save.

Customer Privileges

Customer Privileges specify the options that are available to Customers within the Customer Portal.

Enabling Customer Privileges

To enable Customer Privileges:

1. Select Setup>Privileges>Customer

The Privileges screen is displayed.

Privileges

User

Customer

Requests

System

Customers

Create Account	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Default Web Access	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Generic Request	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Generic Request Type	Incidents <input type="button" value="v"/>
Incidents	Create And Edit <input type="button" value="v"/>
Change Requests	Off <input type="button" value="v"/>
Service Requests	Create And Edit <input type="button" value="v"/>
Service Incidents	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Default Request	Generic Request <input type="button" value="v"/>
Items	View <input type="button" value="v"/>
Show Only Active Items	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Show Subject Field	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Show Status Field	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Show Notify Field	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Subject Required	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Show Priority	<input checked="" type="checkbox"/> Priority <input type="checkbox"/> Urgency <input type="checkbox"/> Off
Item ID Search	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Force Search	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Create Forum Topics	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Display Room	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
View Technician	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Show Services	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Show All Services	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Show Service Targets	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Enable RSS	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Enable Titles	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Enable Item Shadow	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Customer Defined Contact	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Record GPS	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Default Date Style	mm/dd/yy <input type="button" value="v"/>

Customer Privileges	Description
Create Account	Allows Customers to create their own account from the Login screen.
Default Web Access	Define the default setting for Web Access on newly created Customer Accounts.
Incidents	Define if Customers can view, create or edit Incidents in the Customer Portal.
Change Requests	Define if Customers can view, create or edit Change Requests in the Customer Portal.
Service Requests	Define if Customers can view, create or edit Service Requests in the Customer Portal.
Service Incidents	<p>If the option to create Incidents in the Customer Portal is enabled, this can be refined by defining if Incidents can be logged against Service Items. If this option is disabled then Services are not displayed in the Category drop-down list during the Incident creation process.</p> <p>Also, if a Customer attempts to log an Incident against a Service via email by including the Item# in the Subject line, and this option is disabled, the system will send an error message. The "NoServiceIncidentContent" error message can be customized in the Admin>Setup>Email>Templates>Error Message filter.</p>
Items	Define if Customers can view, create or edit their own Item details within the Customer Portal.
Show Only Active Items	Allows Customers to only view Items that are marked as Active in the system.
Show Subject Field	Displays the Subject field above the Description field in the Customer Portal.
Show Priority	Enables Customers to view and set the Priority of their requests. Alternatively, the Urgency can be shown, which will be associated with the Item Criticality to set the Priority. Select "Off" to disable this functionality completely.
Item ID search	Allows Customers to search by an Item's ID when creating a new request.
Force Search	When enabled, proposes solutions for Incidents based on the Item Type, Classification and Description provided.
Create Forum Topics	Allows Customers to create a new Forum topic through the Customer Portal.
Display Room	Displays the Room for an Item when creating a request.

Customer Privileges	Description
View Technician	Yes allows Customers to view the details of Technician assigned to their request in the Customer Portal.
Show All Services	Enables the Service Catalog link in the Services tab of the Customer Portal. This allows Customers to view and log requests against all Services offered by the support organization (i.e., request access to a service). Services listed here are not assigned an Exit Item Lifecycle State.
Show Service Targets	Displays the Response, Restoration and Resolution targets for the SLA assigned to the request in the Customer Portal.
Enable RSS	When enabled, provides the RSS Requests Menu option in the Customer Portal.
Enable Titles	When enabled, displays the Titles Tab within the Setup, which can be customized. This list is then displayed in the Title field in the User and Customer Information screen.
Enable Item Shadow	When enabled, if requests are logged against an Item on the Customer Portal, Technicians can amend the Item assigned to the request without the Customer seeing the change.
Customer Defined Contact	When enabled, this option allows the Customer to define their preferred method of contact in their Profile or My Account screen. Their preference applies when a Team has the Customer Notification option set to Customer Defined.
Record GPS	When enabled, the Customer's GPS location when they last logged into the Customer Portal, is recorded within their Customer Information screen.
Default Date Style	Sets the default Date format to be used across the application.
Default Timezone	Sets the default time zone across the application. This can be overridden on a per User basis, by a User who sets their time zone for their log in account
LDAP/AD	(Visible when an LDAP/AD connection is configured.)
Include Customers	Set to Yes if the system is to import Customer details when synched with an LDAP/AD server.
Mixed Mode	Allows Customer accounts to be created directly through the system, as well as being imported via LDAP/AD.
View Shared Requests	(Request visibility options for the Customer Portal.)

Customer Privileges	Description
By Ownership	Allows requests to be viewed by all Owners of the Item, when logged against a Shared or Global Item. (See the table below for toggle option outcomes.)
By Org Unit	(This option is visible when the By Ownership is enabled.) Allows requests to be viewed by all Customers of an Org Unit assigned to the Item, when logged against a Shared or Global Item.

2. Click Yes to enable, or No to disable a Privilege option
3. Click Save.

Setting the View Shared Requests options

When setting the visibility of requests logged against shared Items, refer to the table below to ensure the correct visibility option is configured for your organizational requirements:

By Ownership	By Org Unit	Shared Request Visibility
No		Only visible to the Customer who logged the request.
Limited	No	Visible to the Customer who logged the request and other Owners in the same Org Unit, assigned to the Item.
Limited	Limited	Visible to Customer who logged the request and members of Org Unit they belong to, if the Org Unit is also assigned to the Item.
Limited	Yes	Requests visible to Owners within all Org Units assigned to the Item.
Yes	No	Visible to Customer who logged the request and other assigned Owners.
Yes	Limited	Visible to Customer who logged the request, other members of the Org Unit the Customer logging the request belongs to and other Owners assigned to the Item .
Yes	Yes	Visible to everyone who share the Item assigned to the request.

Requests Privileges

Requests Privileges allows the Administrator to control the functionality available for requests and set default requirements. These privileges are applied system-wide.

Enabling Requests Privileges

To enable Requests Privileges:

1. Select Setup>Privileges>Requests

The Requests Screen appears.

Privileges

User Customer Requests System

Requests

Enable Escalation Control Yes No

Queues On Off

Control Deployments via RFC On Off

Control CMS via RFC Yes No

Customer CMS via RFC Yes No

Minimum Solution Relevance %

Enable Quick Calls Yes No

Request Priority Derived Selected

Handshaking Yes No

Handshaking Close Action Days

Approval Reminder Yes No

Default Notes Visibility Public Private

Allow Unknown Yes No

Archive Requests Yes No

Default SLA

Default Incident Team

Default Problem Team

Default Change Team

Default Request Team

Review Options

Review SLA Yes No

Review RFC Yes No

KBA Options

Control KBA via Request Yes No

Save

Request Options

Enable Escalation Control

Enables escalation to be enabled or disabled on a per request basis. This option is only available to Supervisor Users.

Request Options

Queues	Allows Teams to use a holding bay for requests that are received via email or the Customer Portal. The Queues can be enabled within the Team Information screen, on a per Team basis.
Control Deployments via RFC	When enabled, Change Requests are automatically created from newly entered Deployments, and will require approval before work commences on the Deployment.
Control CMS via RFC	When enabled, changes made within the CMDB by a Technician will generate a Change Request requiring approval before the change is implemented.
Customer CMS via RFC	When enabled, Customers creating Items via the Customer Portal generate a Change Request that requires approval before the change is implemented in the CMDB.
Minimum Solution Relevance	Define the minimum degree of relevancy for content included in the Description field of a request, when the system automatically searches the Knowledge Base to propose solutions.
Enable Quick Calls	Enables the functionality that allows the Supervisor to profile Requests using Quick Call Templates. These can be used by other system Users when creating new requests.
Request Priority (Derived/Selected)	Enable Derived to allow the system to derive the Priority based on Urgency and Impact of the request . Enable 'Selected' to manually apply the Priority from a list of options.
Default Priority	**This option is displayed when the Incident Priority is set to Selected. The selection made from the drop-down menu, is automatically applied as the default Priority for newly created requests.
Handshaking	<p>Enables notifications to be sent to a Customer using the Propose button within an Incident or Request, stating the Incident/Request will be closed if no reply is received from them within a set number of days.</p> <p>NOTE: Note: The Solution button within an open Incident/Request is not accessible when the Handshaking facility is enabled.</p> <p>When enabled, if Problems or Changes are closed, any related Incidents or Requests are moved to the Pending - Approval State not to the default Closed State.</p>

Request Options

Handshaking Close Action	<p>Sets the system default number of days to lapse before an Incident or Request will close if the Customer does not respond to the handshake email notification. This can be adjusted on a per Org Unit basis.</p> <p>NOTE: Note: To allow Customers to re-open an Incident or Request using the link in the handshake email, the web server must be using Port 80.</p>
Approval Reminder	<p>To automatically send Managers reminder emails regarding Requests requiring their approval, set this option to Yes. When Yes is selected, define the number of days to lapse before a reminder will be sent.</p> <p>The content of the reminder email is drawn from the ApproveChange or ApproveServiceRequest template. These are configured within Setup>Email>Templates tab.</p>
Default Notes Visibility	<p>Sets the system default visibility of Notes, when added to requests. If it is expected that the majority of Notes are to be emailed to Customers, select Public.</p>
Allow Unknown	<p>When set to No and a User opens a request that is assigned the Unknown Service Item, the User will be prompted to update the Item before saving the request.</p>
Archive Requests	<p>When enabled, the number of days a request is closed before being removed from the List View and archived is to be set.</p> <p>Requests that are archived have attachments removed and they are no longer included in the full text index for searching. They are still accessible for reporting purposes and attribute based searches.</p>
Default SLA	<p>Is used as the Default SLA when a new request is created without an SLA defined for the Item, Customer or Org Unit.</p>
Default Incident* Team (required if using AMIE)	<p>Set the Default Incident Team, which is used for AMIE integration and also set as a default Support Team for Item Types.</p>
Default Problem* Team (required if using AMIE)	<p>Set the Default Problem Team, which is used for AMIE integration and also set as a default Support Team for Item Types.</p>
Default Change* Team (required if using AMIE)	<p>Set the Default Change Team, which is used for AMIE integration and also set as a default Support Team for Item Types.</p>
Default Request Team* (required if using AMIE)	<p>Set the Default Request Team, which is used for AMIE integration and also set as a default Support Team for Item Types.</p>
Review Options	

Request Options

Review SLA	When enabled will display the Review date field in the Service Level Information screen. The default number of days between reviewing SLAs should be set and the number of days before the review date for an Alert Reminder, should also be entered.
Review RFC	When enabled the system will display a Review date in the RFC Information tab. The default number of days between reviewing RFCs should be set and the number of days before the review date for an Alert Reminder, should also be entered.
KBA Options	
Control KBA via Request	When enabled, a Request is generated when the KBA is created, deleted or amended and can only be published to the KB by a User with publishing privileges.
Request Type	Specify the type of request to be generated when new or amended KB content is moved to a "Pending Publication" state. (The options are based on the ownership of Change and Service Request licenses.)
Default SLA	Set the default SLA to be used for when requests are logged regarding updates in the knowledge base. Applying an SLA here, determines which workflow and team will receive the requests for approval, as with any other request logged in the system.

* To be set after Teams have been configured.

1. Click Yes to enable, or No to disable a Privilege option
2. Click Save.

Customize

The *Customize* menu allows the Administrator to brand the application where system banners can be replaced with the appropriate organizational banners. Graphics included should be . PNG images. The Application Banner should be 200 x 60 pixels and all other banners should be 500 x 70 pixels.

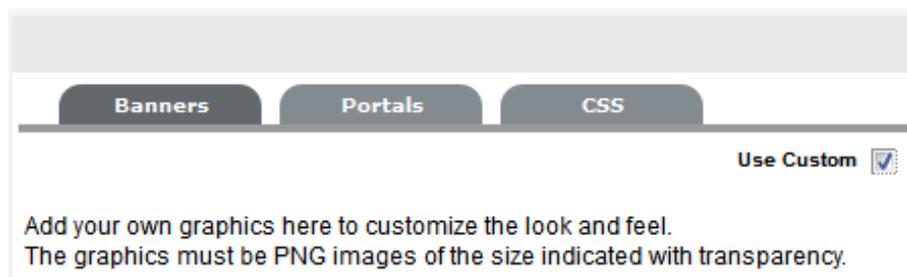
Adding a Customized Banner

To add a customized banner:

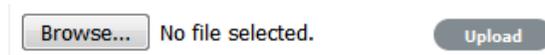
1. Select Setup>Customize

Banner Type	Displayed
Application	Visible on the Log in page of the system.
User	Visible in the portals for Supervisor, Technician, Administrator, Partner, Finance and Manager Users
Public/Email	Displayed on public portals for Knowledge, Outages, Surveys and Forums. This banner is also included in emails when the Setup>Email>Setup option of Include Banner is set to Yes.
Customer	Visible in the Customer Portal. NOTE: Banners for Partner Organizations can be uploaded in the Banners tab of the User>Partner Organization screen. This will override the system Customer Portal banner for Customers associated with the Partner Organization.

- To use *Custom Banners*, select the *Use Custom* checkbox at the top of the *Customize Banners* screen



- To upload a new banner, click *New*
A window with a browse function appears.



- Browse* to the location of the image and click .
The image will be uploaded.
- Repeat the process until all banners have been replaced
- Click Save.*

NOTE: When the Purchase Orders functionality is enabled within the Setup>Billing tab, the option to upload a logo that will be used for system generated POs is displayed. The graphic should be saved as 150x150 PNG file.

Portals Tab

All Public Access home page messages can be fully customized under the Portals tab. Links to documents and downloads may be added. The home page messages can be customized for:

- ♦ Alerts

- ◆ Forums
- ◆ Knowledge Base
- ◆ Login Page
- ◆ Public Outages
- ◆ Planned Outages
- ◆ Surveys
- ◆ Customer Portal welcome message.

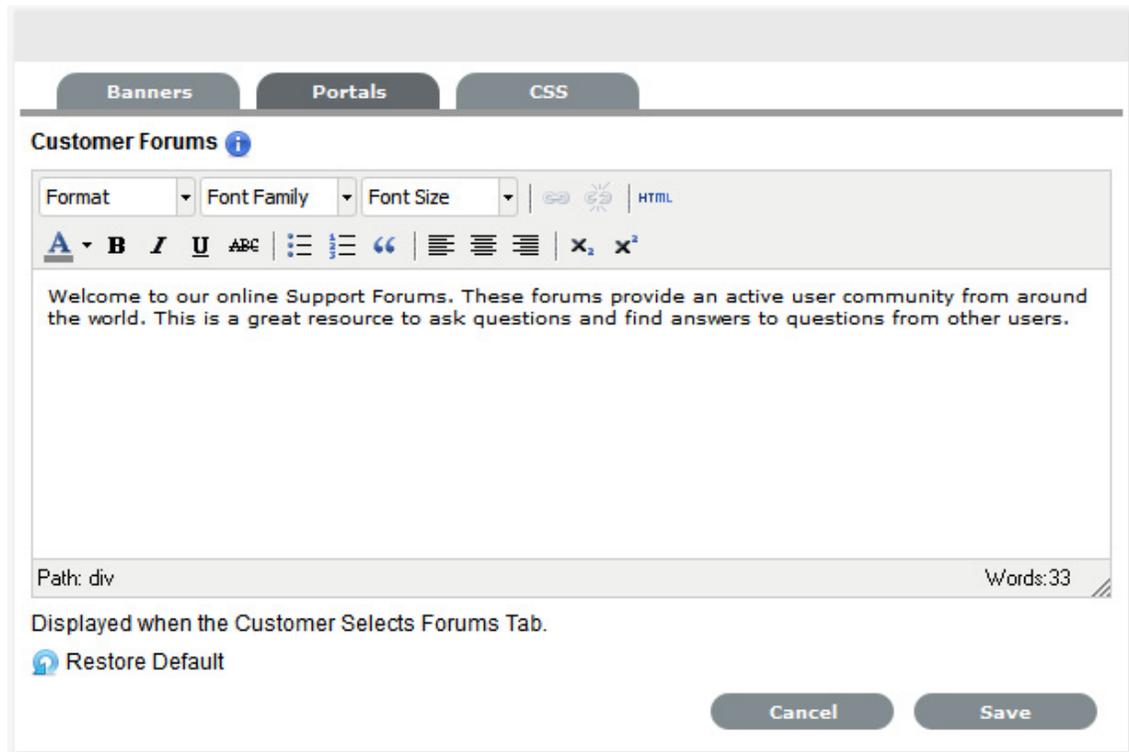
NOTE: Outage Home and Planned Home Messages apply in Service Manager only.

To customize a Public Access message:

1. Select Setup > Customize
2. Click the Portals tab

Name	Title
AlertHome	Public alerts page.
AllServices	Displayed when the Customer selects Service Catalog page under Services Tab .
CustomerForums	Displayed when the Customer Selects Forums Tab.
ForumsHome	Public forums page.
Items	Displayed when the Customer Selects Items Tab.
KnowledgeHome	Public knowledge page.
Login	Displayed on the main login page.
Logout	Displayed when the user logs out.
OutagesHome	Public outages page.
PlannedHome	Public planned outages page.
Requests	Displayed when the Customer Selects Requests Tab.
SelfHelp	Displayed when the Customer Selects Self Help Tab.
Services	Displayed when the Customer Selects Services Tab.
Sspr	Displayed on the main login page.
SurveyHome	Online surveys page.
Welcome	Displayed when the Customer has logged in.

3. Select the Name hyperlink
The HTML editor appears.



4. Edit the message as required
5. Click Save.

Cascading Style Sheets

The system can be further customized using cascading style sheets (CSSs) to amend:

- ♦ Color
- ♦ Fonts
- ♦ Tabs
- ♦ Graphics.

See: [CSS Tab](#).

Cascading Style Sheets (CSS)

Cascading Style Sheets (CSS)

The CSS tab allows Users to customize the look and feel of banner backgrounds and tabs within the system. Knowledge of working with cascading style sheets is recommended when making changes to these settings.

The options available for configuration include:

CSS Editor

Application Banners

CSS Editor

div.login-panel div.login-header div.login-title-custom	This controls the style of the customized banner on the Login page.
div.login-panel div.login-header div.login-title-container	This controls the style of the default banner on the Login page.
div.login-panel div.login-header span.login-app-logo	This controls the helpdesk icon graphic on the Login page.
#header .customPngBanner	This controls the style of the customized banner within the User portal.
#header .defaultBanner	This controls the style of the default banner graphic within the User portal.
#header .customPngBanner	This controls the style of the customized banner within the Customer & Public portals.
#pageHeader .defaultBanner	This controls the style of the default banner within the Customer & Public portals.
Menu Options (User Portal)	
#menu a.active	This controls the highlight on the active (main) menu selection.
submenu a:hover	This (in tandem with the span extension) controls the mouseover (hover) on the submenu tabs.
#submenu a:hover span	This (in tandem with the hover default above) controls the mouseover (hover) on the submenu tabs.
#submenu a.active	This controls the highlight applied to the selected submenu options.

If unwanted changes are made to the system Style Sheets, use the Default button to return the system to the out-of-the-box format.

LDAP Authentication

There are several ways to authenticate users of the service management application. By default the system uses its internal authentication mechanism but there is also the option to authenticate against one or more Directory Servers or use OpenID Providers.

Internal Authentication

Using internal authentication requires the Administrator or Supervisor to create accounts for all User types by entering the contact information, access levels and password. This information is then saved to the system database. The typical case for using Internal Authentication is where there are few Users, or in an environment that has no pre-existing directory server. Usually, the Administrator would configure the User accounts prior to announcing the system is operational, and from that point on, maintain the accounts as necessary. (See: [Create Customers](#) or [Create Users](#).)

OpenID Providers

OpenID is a decentralized process to verify a Customer's or User's online identity. It addresses the single sign-on issue by not relying on a centralized website to confirm a User's identity. The system can be enabled to be an OpenID consumer, which provides seamless authentication between third

party authentication utilities and the service management system. OpenID Providers are configured within the Social tab, and Customers or Users that have accounts with the configured OpenID Providers can log into the system by selecting the relevant icon on the Login page.

Directory Server Authentication

The system allows the Administrator to connect to one or more Directory Servers for User authentication purposes. This removes the need to create User accounts as it allows the application to synchronize User accounts and access levels with the existing Directory Server. It has the added benefit of allowing the Administrator to work with existing infrastructure. (See: [AD Authentication](#) or [LDAP Authentication](#).)

Directory Server Groups (External Authentication)

[Roles](#) are used to grant access within the application. Users must be assigned to Groups on the directory server that correspond to the Roles within the support system. Group members are assigned Roles and access levels within the service management tool.

The default group names the system expects to find on the directory server are:

- ◆ Administrators
- ◆ Supervisors
- ◆ Technicians
- ◆ Partners
- ◆ Managers
- ◆ Finance
- ◆ Customers.

The Group names can be customized in the [LDAP/Active Directory Advanced tab](#). Users can belong to more than one group, for example if a User holds the Roles of Technician and Manager, they would belong to the Technicians and Managers groups.

NOTE: Users can have only one of the Partner, Supervisor and Technician Roles. Therefore, they can belong to only one of these groups. However, they may also belong to any other group, or combination of groups.

The following fields may or may not be mapped, depending on the options set by the system Administrator:

- ◆ First Name
- ◆ Last Name
- ◆ Email
- ◆ Phone
- ◆ Mobile
- ◆ Pager
- ◆ Address
- ◆ City
- ◆ Zip
- ◆ Country.

Email Address

All User accounts must include an email address to be successfully imported into the system. If additional fields have been mapped from the authentication server to corresponding fields in the application, a drop-down menu containing all the optional values for the field will be available beside the mapped field. Choose the correct value from each list.

Mixed Mode Authentication

The application can use a combination of internal and external authentication. This means, the service management tool can be synchronized with a Directory Server to import User and Customer details as well as allowing Customer Accounts to be created directly within the system. Such a feature is useful, if the service and support solution is being used for internal and external customer support.

To enable Mixed Mode authentication, after the system has connected to the Directory Server, move to the Setup>Privileges>Customer tab and enable the Include Customers option to display the Mixed Mode field. Set the Mixed Mode option to Yes.

NOTE: If authenticating against a Directory Server, all User accounts will validate against the server except for the application default Administrator User. The default Administrator User account details can be modified within the My Account tab of the application.

Creating a Customer (Internal Authentication)

Creating a Customer (Internal Authentication)

Use the Customer Information Tab to view and edit Customer details. It is also possible to set Customer Roles, line managers and default login details.

Creating a Customer Account

When creating a Customer, the following four tabs are available:

- ◆ Contact
- ◆ Aliases
- ◆ Items
- ◆ Contracts.

Information Tab

This tab is used to enter contact information for a Customer, when creating a new customer account.

NOTE: If Custom Fields are to be created for Customer Information it is recommended that the Administrator complete the configuration prior to creating Users. See [Custom Fields](#).

To create a Customer account using internal system authentication:

1. Select User>Customers
2. Select New

3. The Customer Information screen appears, with the following fields:

Customer Information Fields

Access

Title If enabled, select the appropriate title from the drop-down options. (This field is displayed if the Enable Titles option is set to Yes in the Admin>Setup>Setup>Privileges>Customer tab.)

First Name* Customer's First Name.

Last Name* Customer's Last Name.

User Name* The login User name credentials for the User. If this is imported via LDAP or Active Directory, it can not be edited. Otherwise, enter a Username. Note that the value must be unique.

Password/ Confirm Password The Default Password is set to the Customer's email address or a random string can be enabled by the Administrator in Setup>Privileges>System. See [Authentication](#).

Customers can reset their password from the Customer Portal, or a Service Desk User can reset it in the customer account details using the Reset Password button through the Customer>Information tab.

Web Access Web Access allows Customers to view their account information and Incidents via the Customer Portal.

Contact

Primary Email* The Customer's Email address. System messages are sent to this address.

Send To This field becomes when alternate email addresses are entered on the Aliases tab.

Select the most appropriate email address to be set as the default address applied to Customer correspondence. When the Send To field is set to an alias address, the Primary Email address is not included in the cc list, unless specified in the request Information tab cc list.

Org. Unit The Organizational Unit, be it a Company or Department with which the Customer is associated.

(Organizational Units are created by the Supervisor, in Users >Organizational Units.)

Line Manager If relevant, assign a system user with the Customer Role who can approve/reject requests made by this Customer, as part of the Change Management or Service Request approval process. (This information can not be edited if the line manager details are set by the LDAP synch.)

Customer Information Fields

Room	This field is visible if the Display Rooms option is set to Yes in the Setup>Privileges>Customer screen and there are Room details configured in Organizational Units.
Address 1	First line of Customer's address.
Address 2	Second line of Customer's address.
City	Customer's city details
State	Customer's State details. Options will be displayed for the State, once the Country is selected, if Regions are configured for the Country in the system.
Zip/Postcode	Customer's area code.
Country	Customer's country. The country selected will determine the time zone and state options for the Customer.
Email Locale	Set the default language for email correspondence.
Phone	Enter Phone details.
Fax	Enter the Customer's fax number, if relevant.
Pager	Enter the Customer's pager details, if relevant.
Mobile	<p>A mobile number can be entered as a contact number or for use with SMS (Short Mail Service message). An SMS can be sent to notify the assigned Technician when a request is created.</p> <p>SMS Messaging options:</p> <ol style="list-style-type: none">1. From the drop-down list, select the SMS Service Provider.2. Override SMS Address. If your service provider does not appear in the list, click this checkbox and enter an alternate Service Provider.
SMS Override	Enter SMS Gateway override details for the Customer, if a number other than the one entered in the Mobile field is to be used to send/receive updates via SMS. Enter the complete SMS details in email address format, i.e., 000777891@smsgateway.provider.com.
Partner	
Customer of	<p>Nominate the Partner Organization associate with the Customer. This is an external service provider who manages the Customer's request.</p> <p>(The option is enabled by the Administrator in Setup Privileges> Use >Edit Customer Partner. The Partner Organizations are defined by the Supervisor in the User>Partner Organizations tab.)</p>

Customer Information Fields

Locale	
Time zone	The Customer automatically adopts the default Timezone set for the system. However, the Timezone can be manually adjusted here for the specific Customer.
Last Login	Auto-populated with the date the Customer last logged into the system.
Host	The IP address of the last login for the Customer
GPS	The GPS coordinates of the last known address for the Customer. (This field is displayed when the Record GPS option is enabled in Admin>Setup>Setup>Privileges>Customer tab.)
Roles	
Current*	Multiple Roles can be assigned to a User. Select other Roles the Customer will use, by ticking the check boxes. Note: If the Technician Role is selected, a Supervisor must be allocated.
Default Portal	The Default Portal is the user interface a Customer, who is assigned multiple Roles, accesses by default when they log into the system. NOTE: If the Users Default Portal is set to Customer, the User details will not be accessible in the Users list, but included in the list within the User>Customer tab.
Details	
Notes	Click on the field to enter any Customer relevant information.

* Denotes mandatory fields

1. Click Done.

Emailing Customers Credentials



To email a newly created Customer details regarding their system log in details, click the Email button within the Customer Information screen. If Random Passwords is enabled, selecting Email will reset the Password and forward the details to the Customer. If Password Questions is enabled in Setup>Privileges>System, selecting Email will send a link to the Customer directing them to a page that includes the security questions set for their account and reset the password based on the answers provided. Customers must complete this process within an hour of the email being sent.

vCard Button



Select this option to download and open the Customer's information in an electronic business card format, to email or save outside the system.

Aliases Tab

The Aliases tab is used to enter additional email addresses. Email addresses in the Aliases tab allow the Customer to send emails to the System or Team support addresses from more than one address. The system creates requests from these emails. Notifications for requests created using an address in the Aliases tab, are sent to the main email address and cc'd to the alias address that was used to create the request.

When one or more alias email addresses have been created for a Customer, a Send To field is displayed on the Customer Information screen, which allows the most appropriate email address to be set as the default address applied to Customer correspondence. When the Send To field is set to an alias address the Primary Email address is not included in the cc list, unless specified in the request Information tab cc list.



To add an alias email address:

1. Select User>Customers
2. Click on the Customer name
The Customer Information screen appears.
3. In the Information tab, click Edit
4. In the Aliases tab, click Add
5. Enter an alias email address
6. Click Save
7. Select Done.

When an alias email address has been created for a Customer, a Send To field is displayed on the Customer Information screen, which allows the alias email address to be set as the default address applied to Customer correspondence.

To remove an alias email address, in Edit mode, tick the checkbox next to the relevant email address and then click Remove.

Items Tab

The Items tab defaults to list of Items assigned to the Customer. To view Shared Items, tick the Include Shared option. To view the Item details, select the Item Number hyperlink. Select the Excel button to output the Item List to Excel format.

Customer Information

Contact Aliases **Items** Requests Contracts

Add Remove Excel Jason Blackett

Include Shared Display: 10

<input checked="" type="checkbox"/> Item No.	Item Type	Team
<input type="checkbox"/> srm-tst-nsd-222	Dell Latitude E6430	Device-Incident Team
<input type="checkbox"/> Notepad++	Windows Bundle	Device-Incident Team
<input type="checkbox"/> Jason-Iphone6	Iphone 6	Device-Incident Team
<input type="checkbox"/> Microfocus - eLearning	Website Services	Device-Incident Team
<input type="checkbox"/> Email Service	Email Services	Device-Incident Team

1 - 5 of 5 Results

Cancel Save

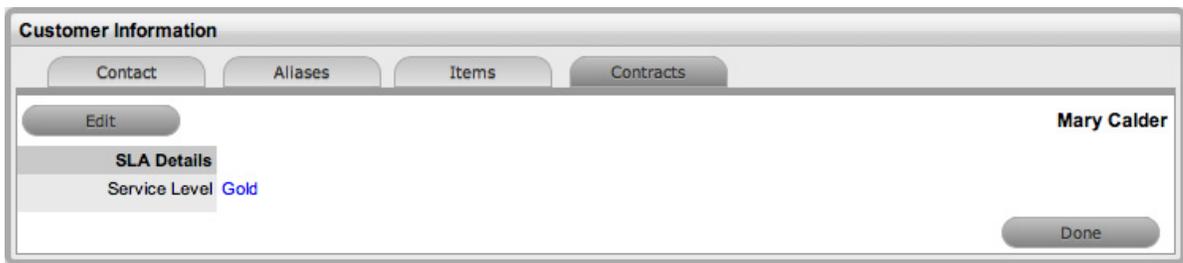
To add an Item:

1. Select User>Customers
2. Click on the Customer name
The Customer Information screen appears.
3. In the Information tab, click Edit
4. In the Item tab, click Add
The Find Item editor is displayed.
5. Search for the relevant Item
For details regarding an advanced Item search see: [Advanced Search](#).
6. Select the Item # hyperlink
The selected Item will be associated with the Customer.
7. Click Save
8. Select Done.

To remove an Item, in Edit mode, tick the checkbox next to the relevant Item and then click Remove.

Contracts Tab

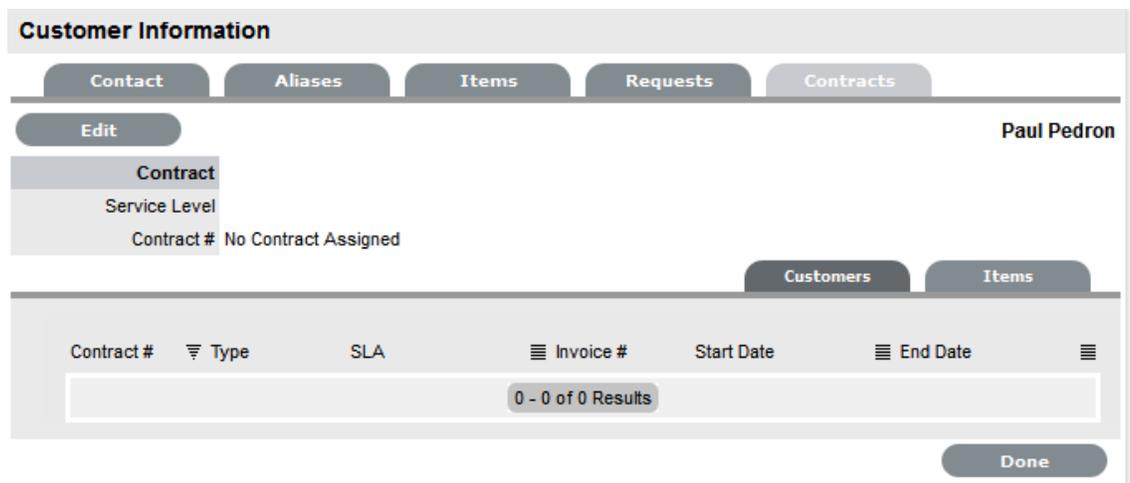
The Contracts tab displays a Customer's current contract status. A Customer can be assigned an SLA or Contract when Billing>Contracts is enabled. A Customer can only have one active Contract.



To create a new Contract for a Customer:

1. Select User>Customers
2. Select the Customer Name
3. Move to the Contracts tab
4. Click Edit

The system will display the Add button in the Customers tab



5. Click Add
The SLA options are displayed.
6. Select a Service Level from the list
When selected, the screen expands to display the Time, Start and End date fields.

Customer Information

Contact Aliases Items Requests Contracts

Contract

Invoice Number 100032

Service Level SLA

Incident

Priority	Response Time	Restoration Time	Resolution Time	24 x 7 support	Alert
Urgent	6 Hours	12 Hours	24 Hours	Yes	None
High	12 Hours	24 Hours	48 Hours	Yes	None
Medium	18 Hours	36 Hours	72 Hours	Yes	None
Low	24 Hours	48 Hours	96 Hours	Yes	None

Contract Type Per Customer

Time Support Hours

Support Hours

Start Date 01/06/16 14:15

End Date 01/06/17 23:59

Notes

Price \$100.00

Tax \$0.00

Taxable

Total Cost \$100.00

Cancel Save

7. Define the Contract Time period

For the Per Customer Contract Type the Time Period for the Contract can be defined:

If *Subscription* is selected, the Start and End Dates are automatically completed by the system, but can be edited if required.

If *Time Limited Subscription* is selected, the Support Hours field is displayed and the number of support hours purchased by the Customer should be entered. Also, the Start Date and End Date fields should be completed manually, entering the length of time for the subscription period.

If *Support Hours* is selected, the number of support hours purchased by the Customers should be entered

If *Support Hours By Month* is selected, define the number of Support Hours covered per month and on which day of the month the Contract is designated as the Rollover Day. The Start Date and End Date fields are automatically completed as an annual contract subscription but can be edited, as required.

If the Start Date is set as a future date, the Pending Contract status is assigned. See [Pending Contracts](#).

8. Click Save

9. Click Next to continue

The system reverts to the Contracts summary screen.

The screenshot shows the 'Customer Information' interface. At the top, there are tabs for 'Contact', 'Aliases', 'Items', 'Requests', and 'Contracts'. The user's name 'Michael Angelo' is displayed in the top right. The 'Contract' tab is active, showing details for a contract with Service Level 'Warranty', Contract # '2' (with a red 'x' icon), Contract Type 'Subscription', Invoice # '100002', Start Date '01/05/16', End Date '01/05/17', and Expires '1 Year 0 Day'. Below this, there are tabs for 'Customers', 'Items', and 'Audit'. The 'Customers' tab is active, displaying a table with columns: Contract #, Type, SLA, Invoice #, Start Date, End Date, and buttons for 'Add' and 'Delete'. The table contains one row with Contract # '2', Type 'Per Customer', SLA 'Warranty', Invoice # '100002', Start Date '01/05/16 11:59', and End Date '01/05/17 23:59'. Below the table is a pagination bar showing '1 - 1 of 1 Results'. At the bottom right, there are 'Cancel' and 'Save' buttons.

10. Click Save. Click Done.

To delete a current Contract select next to the Contract Number. Alternatively, to delete a current or queued Contract, within the Contract>Customers tab check the field next to the relevant Contract # and select the Delete button.

The Items tab within the Customer>Contracts screen is used to list all the Items with a Contract that are owned by a Customer.

The list of requests with the time recorded against the Contract is displayed within the Audit tab. The Summary view displays the list of requests with total number of Notes and Time allocated to the Contract, while the Detail view includes a breakdown of all Notes and the associated time related to each request.v

Searching for Customers

To search for Customers within the Users>Customers tab:

1. Go to Users>Customer
2. Click



3. Enter any known Customer details
Or, for a complete Customer list enter a before or after date for Customer creation
4. Click Search

The results will be displayed in a table with the Customer Name and contact information.

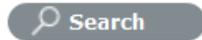
5. Click on the Customer Name to open the Customer Information module or select the Email Address to send an email.

Re-enabling Deleted Accounts

Administrators have the ability to reactivate deleted Customer accounts.

To enable a deleted account:

1. Within the User > Customers tab select



2. Toggle the Account Status option to Deleted
3. Click Search

A list of deleted Customers is displayed.

4. Select a Customer to re-enable

The Customer information page appears.

5. Click the Enable button, to reactivate the account.

The Customer account becomes active and is available within the system.

LDAP Server Integration

Multiple types and sources of directory servers can be synchronized with the system at any one time. Among the several LDAP servers supported by the system, and which this section discusses, are the following:

- ◆ Open LDAP
- ◆ Netscape Directory Server
- ◆ Novell eDirectory.

It should, however, be noted that LDAP does follow a standard and as such the settings detailed herein should also apply to other implementations.

Configuring LDAP Server Integration

To configure LDAP Server integration:

1. Select Setup>LDAP
2. Click New

The LDAP /Active Directory Server tab is displayed.

3. Enter the Server Name

(If the system is to synch with Zenworks, ensure the Server Name matches the User Source Name used by Zenworks.)

4. Select LDAP within the Type drop down list

LDAP Setup

Server

Server

Name

Type **LDAP Server** ▼

Settings

Security **LDAP Server**
Active Directory + Password ▼

5. Complete the Settings fields

Fields	Description
<i>Security</i>	<p>Secure Socket Layering (SSL) encryption is provided for Active Directory and LDAP server integration. Details entered here determines how the integration layer authenticates.</p> <p>User authentication can be with Secure Socket Layering (SSL) or Clear Text. Select Anonymous or User name and Password.</p> <p>If Anonymous is selected, ensure anonymous access to the directory is available.</p>
Server Host	Enter the host name or IP Address of the LDAP Server.
Server Port	This is the LDAP Server Port. The default is 389.
User name	<p><i>The system authenticates the</i> user name against the LDAP Server. Leave this blank for anonymous connections.</p> <p>Where a user name is provided, Netscape allows the internal users to connect as the account name, so using 'cn=Directory Manager' is acceptable.</p> <p>Open LDAP expects the fully qualified Domain Name for the user, regardless of access level, so at the very least 'cn=Manager,dc=example,dc=com'.</p> <p>For other accounts the user BaseDN is required. Users logging in need only enter their login name, it is assumed the login name will be unique across the entire directory.</p>
Password	If a User account is specified in the User name field, enter the account password.
BaseDN	<p><i>The</i> Base Domain Name refers to the domain location of the User Groups. For example, assume that the location of the User Groups is the following:</p> <p>ou=UserGroups,ou=MIS,dc=myoffice,dc=mycompany,dc=com</p> <p>The above String would be the BaseDN.</p>
Locale	

Fields	Description
Default Timezone	Select the default Timezone to be applied to all User accounts imported using the authentication server.

6. Enter all required fields to configure the Directory Server

LDAP Setup

Server
Advanced

Server

Name

Type

Settings

Security

Server Host

Server Port

Username

Password

Base DN
(e.g. ou=Groups,DC=example,DC=com)

Locale

Default Timezone

Test
Sync
Delete
Cancel

Save

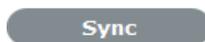
Test Button



The Test button will create a connection to the LDAP Server using the configuration settings. If successful, it will attempt to determine how many Users are in the top level of each group and display a Results screen.

NOTE: If the test fails, an error message will display the cause.

Synch Button



The Synchronization button runs the synchronization process manually. It is most useful for the initial deployment, and when new directory server accounts have been created for Users who require immediate access to the system.

If using Certificates ensure the certificate details are entered in the Certificates tab before synchronizing.

Only one synchronization can run at a time. For multiple users needing access, create the accounts on the LDAP server then run a single manual synchronization.

A manual synchronization may take some time as it depends on the connection speed with the external service. The manual synchronization works best for small directories, as larger directories take more time to propagate changes.

Importing Customer Details

Customer details can be imported using LDAP by enabling the option, if required. When the system is setup to synchronize with LDAP, move to the Setup>Privileges>Customer tab and enable the Include Customers option.

LDAP/AD	
Include Customers	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Mixed Mode	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

If there is a need to create Customers using LDAP and the system's internal authentication capability, Mixed Mode authentication can also be enabled. After the option to Include Customers is set to Yes in the Customer Privilege tab, the Mixed Mode field is displayed. Set this option to Yes to allow Customers to be created directly in the system and using LDAP.

Category Classifications

A list of Classifications used to define issues are created within this tab and used as the generic Classification for requests logged against Items that apply the Item Type Category being configured. The Classifications are also used by the system for proactive Incident analysis and Problem groups.

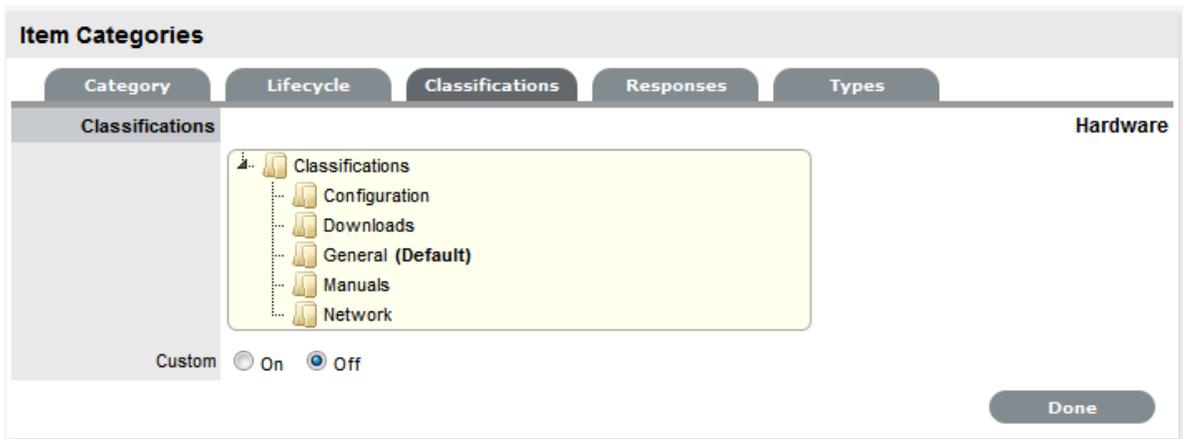
Supervisor Users can define additional Classifications for specific Item Types, within the Configuration>Categories>Item Categories>Classification tab.

The system is installed with several default Classification Type Categories, which can be edited if required.

NOTE: The General Classification is owned and used by the system and cannot be deleted. It is also advised that this Classification not be renamed, as this is the Classification assigned to requests when they are created via email.

Classification Tab

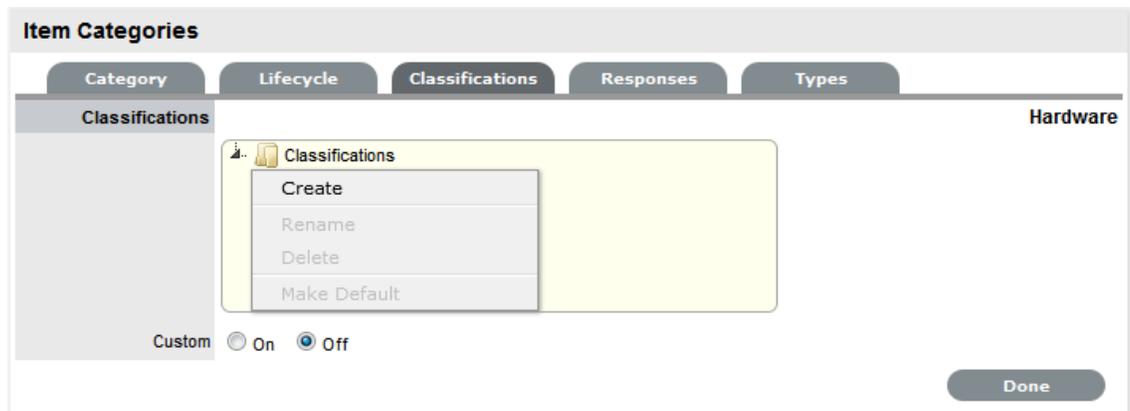
Additional Classifications can be created for each Item Category, while the system provided Classifications can be renamed or deleted. The Custom facility, when enabled, allows Users to add Classifications during the request creation process.



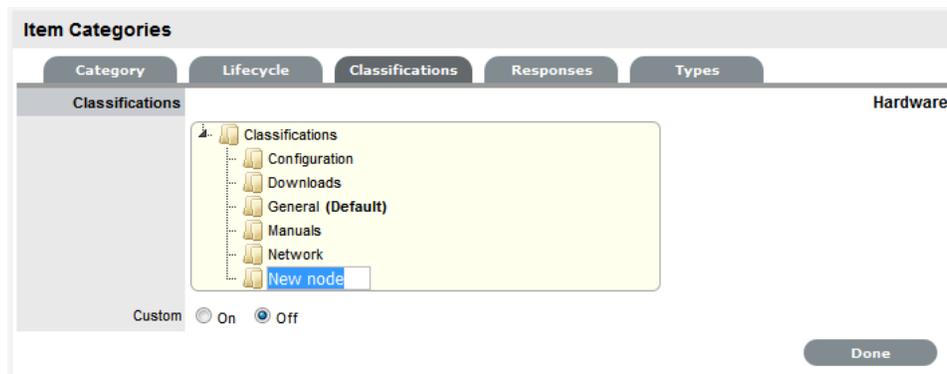
Creating a New Item Category Classification

To add a new Classification:

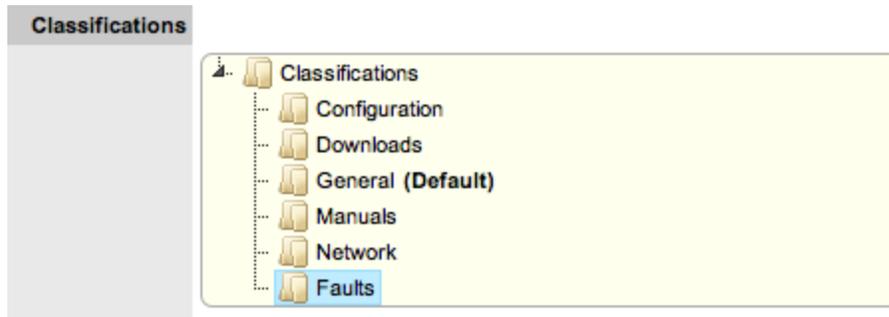
1. Select the Classification tab of an Item Category
2. Right-click on the Classifications header
3. Select Create



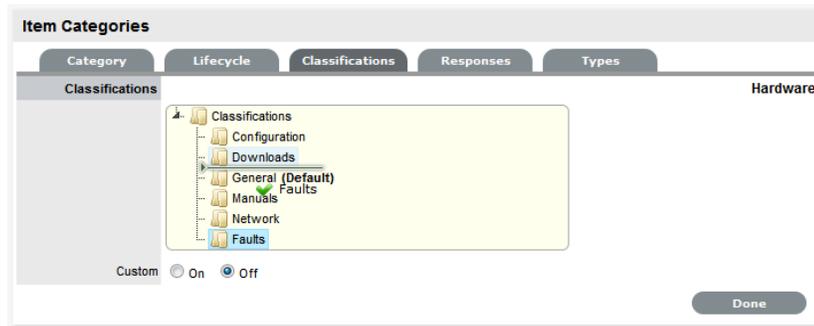
4. Enter the details in the newly created node



5. Click outside the text box to commit the entry listing



6. Repeat the above process to create all required list entries
7. Move an existing Classification to a new position, if required
Select the entry, then drag and drop the entry into its new location.



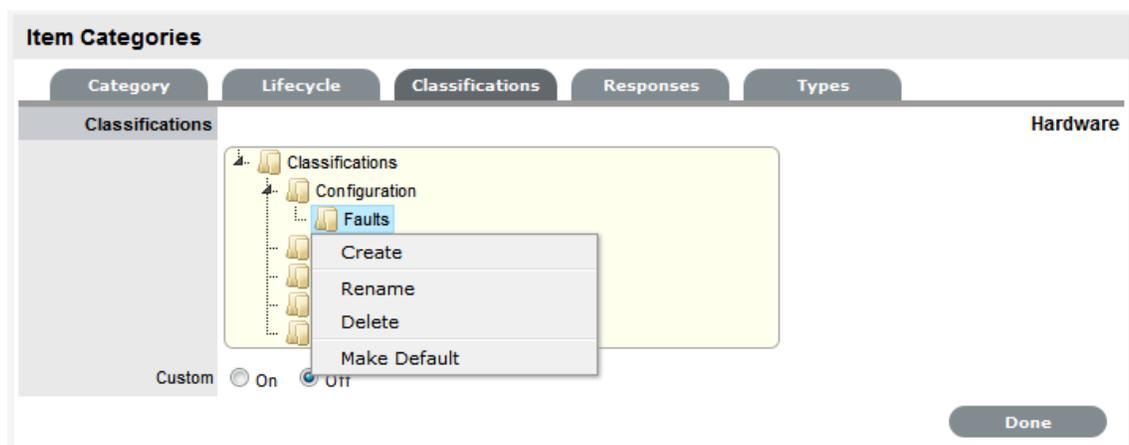
8. Click Save.

Creating Sub-Classifications

Classifications can be expanded to include nested Classifications.

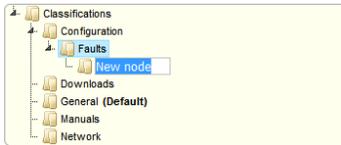
To create Sub-Classifications:

1. Right-click the relevant Classification header
The Create, Rename, Delete and Make Default options are displayed.

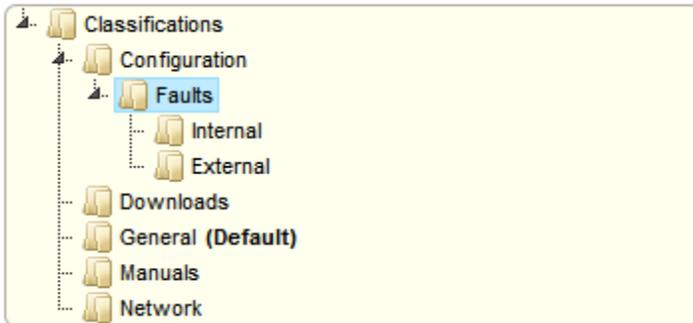


2. Select Create

A text box will appear under the Classification.



3. Enter the name for the list entry
4. Click away from the text box to commit and save the change
5. Move an existing Classification to a new position, if required
Select the entry, then drag and drop the entry into its new location
6. The above steps can be repeated until the sub-category list is completed.

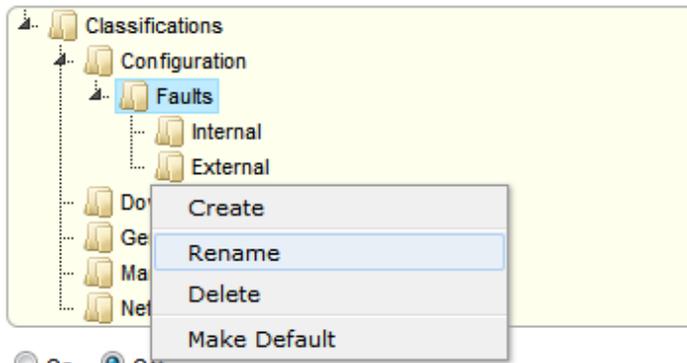


Renaming a Classification

Any Item Category classification can be renamed.

To rename a Classification:

1. Right-click the Classification



2. Click Rename
3. Edit the field content
4. Click away from the text field to save the change.

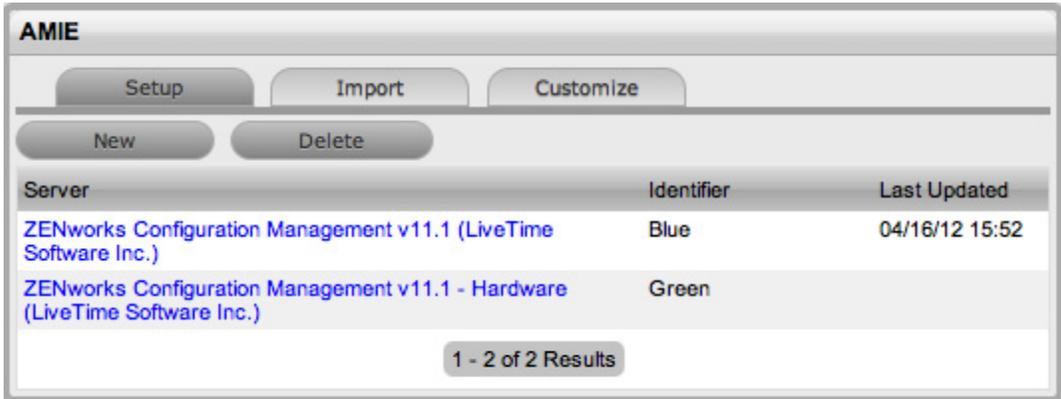
Deleting a Classification

To delete a Classification:

1. Right-click the relevant list entry
2. Click Delete
3. Click Done when the Classification Categories are complete.

Managing Items using Database Mapping (AMIE)

Within the CMDB Import screen multiple asset management datasources can be synchronized with the service management system. When one or more applications are configured within AMIE, a list is displayed within the AMIE Setup tab.



The screenshot shows the AMIE Setup tab with three sub-tabs: Setup, Import, and Customize. The Setup tab is active, showing a 'New' button and a 'Delete' button. Below these buttons is a table with three columns: Server, Identifier, and Last Updated. The table contains two entries for ZENworks Configuration Management v11.1 (LiveTime Software Inc.). The first entry has an Identifier of 'Blue' and a Last Updated date of '04/16/12 15:52'. The second entry has an Identifier of 'Green'. Below the table is a button labeled '1 - 2 of 2 Results'.

Server	Identifier	Last Updated
ZENworks Configuration Management v11.1 (LiveTime Software Inc.)	Blue	04/16/12 15:52
ZENworks Configuration Management v11.1 - Hardware (LiveTime Software Inc.)	Green	

Importing Items Using Database Mapping

To import Items using Database Mapping, the following configuration steps need to be completed:

1. Select Setup>AMIE
2. Click New

The Server, Database, Ownership and Synchronization fields appear.

AMIE

Setup Import Customize

Server

Type ZENworks Asset Management v6.5+ ▼

Identifier

Database

Type SQLServer ▼

Host

Port 1433

Name ZENworks

Username NCSYSTEM

Password ●●●●●●●●

Schema dbo

Catalog ZENworks

Ownership

Default Customer Unassigned (Import Items as Global)
 System User
 Selected Customer:

Ignore Domain Info

Synchronization

Auto Create New Items Yes No

Frequency Never ▼

Test Cancel Save

Configuration

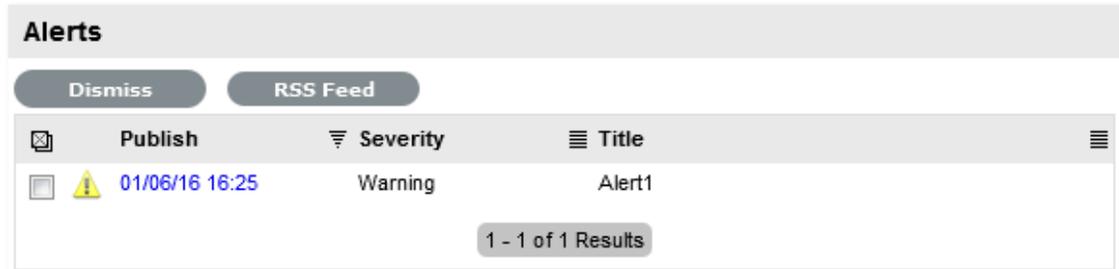
System Type	Define the system type as Database Mapping.
Identifier	An identifying label that is used in List Views to inform Users regarding the Source of an Item.
Server	
Type	Select the Type of inventory management product.
Database	
Type	Select the Database Type.
Host	Enter the Host name or IP Address.

Configuration

Port	Enter the Port Number for the database server.
Name	Enter the Database name.
Username	Complete User name details.
Password	Complete Password details.
Schema	Enter the Schema type.
Catalog	Enter the Catalog name. Typically this would be the name of the Database.
Notification (Only If 'Control CMS via RFC' is enabled)	
Email RFC's to Tech?	Select this option if technicians are to be notified of generated change requests.
Ownership	
Unassigned (Import Items as Global)	Select this option if Items are to be globally owned.
System User	Select this option to assign imported Items to the System User.
Selected Customer	Select this option to assign imported Items to a specific Customer.
Ignore Domain Info	Tick this field if the system is to disregard domain details attached to the User Name inside the AMIE source when assigning an owner.
Synchronization	
Auto Create New Items	This option is only visible when a single AMIE source is defined within AMIE. When enabled, Items are automatically created upon synchronization, relative to the Control CMS via RFC setting within the Setup>Privileges>Requests tab . If disabled, a snapshot of imported asset information is listed within the Super>Configuration>AMIE Snapshots tab.
Frequency	Choose a synchronization interval. This can be left as Never if the database will be synchronized manually. NOTE: Synchronization times will vary depending on the connection speed with the external service and the database size.

3. Click Test, to initiate a connection and test the setup
If a connection is not made, a system message will advise which part of the configuration was not successful.
4. Click Save
5. To execute the import, click the Import button
6. After the import is complete, an Alert appears providing results of the import.

Click on the Publish link to read the Alert details.



AMIE Import Alert

Alerts are generated for the Admin User after the AMIE synch is completed. The import alert summary displays:

- ♦ the details of the system that the synchronization was run against, as it is possible to import from multiple sources.
- ♦ the number of assets found in the datasource.
- ♦ the number of assets automatically created if a single datasource is configured in AMIE and the auto-create option is enabled; or if the Auto-Create option is disabled and Items already exists in the system, the number of Items that were updated.
- ♦ the number of AMIE Snapshots successfully imported, with a breakdown of new Items added and number of Items updated.

Delete Options and AMIE

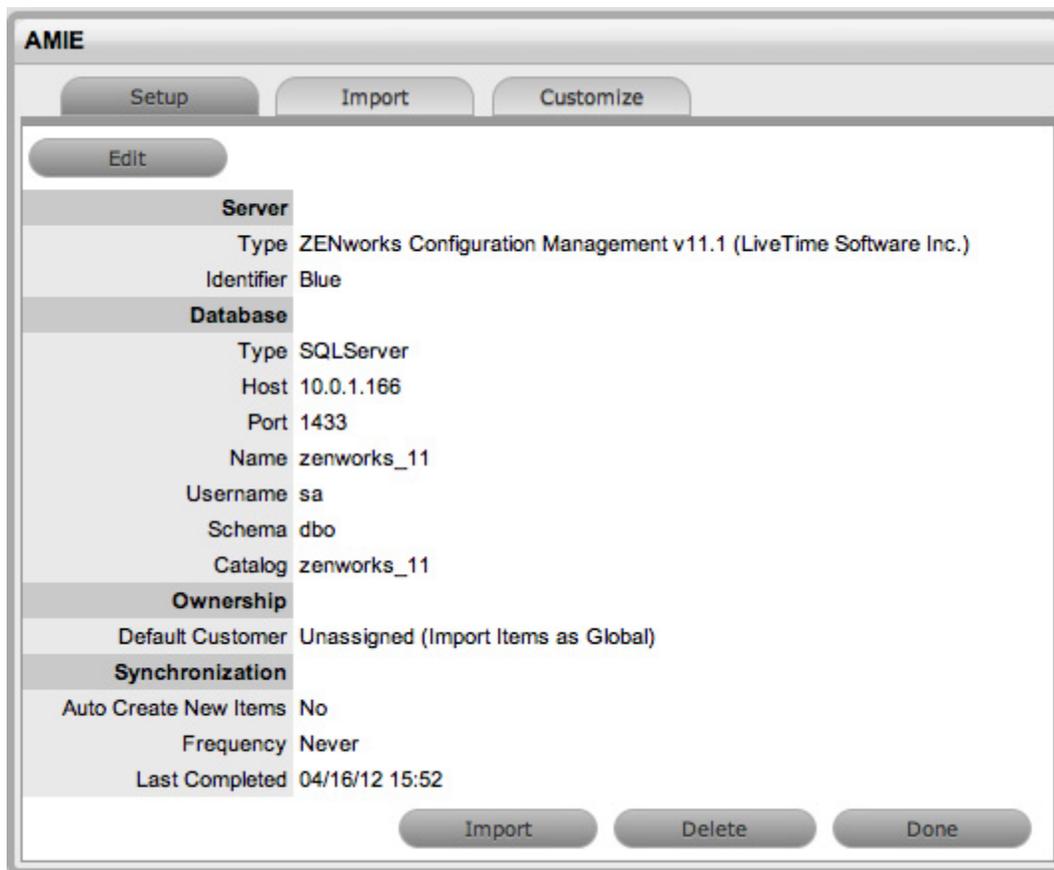
The options to delete AMIE configurations can be achieved through the List View on the AMIE Setup tab, or by clicking on the a hyperlink within the Server column within the List View, which displays the expanded Setup view for the specific asset management tool.

The Delete button clicked in the AMIE>Setup tab>List View results in Global level "delete" flags being applied to all AMIE-managed Items stored in the system, however it retains the server details configured in AMIE and their associated snapshots.

The imported Items that are deleted are not completely removed from the database but are flagged as not available . By not erasing the Items completely, the historical data is maintained and allows these Items to be re-enabled in the future. It should be noted that the Item Types associated with the deleted imported Items are not disabled in the application.

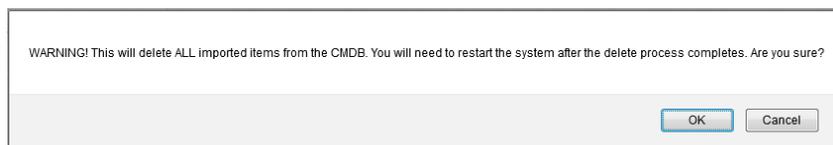
The Delete button selected within the expanded Setup tab view for the specific asset management datasource, results in Configuration level deletion of the configured server and any related AMIE snapshots.

NOTE: The application must be restarted after the performance of either deletion operation, to allow the changes to take effect and prevent unpredictable behavior of the system.

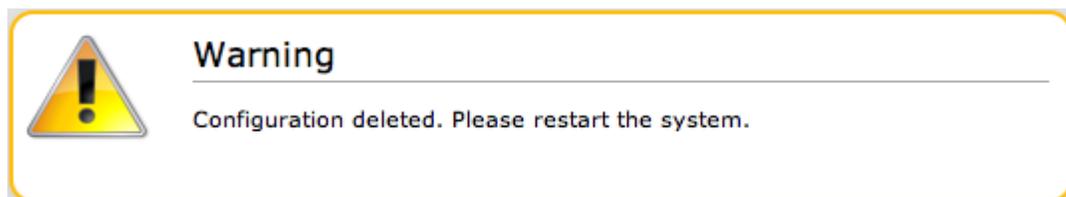


To delete the server configuration within AMIE and related snapshots:

1. Select Setup>AMIE>Setup
2. Select the Server link option within the AMIE list view
The expanded Setup screen is displayed with the Delete button.
3. Select the Delete button
A pop-up message is displayed asking your to confirm the deletion action.



4. Click OK.
A warning message is displayed informing you to restart the application server to complete the deletion process.



Re-enabling Deleted Items

To re-enable Deleted Items, initiate an Item search on deleted Items within the Configuration>Items screen of the Supervisor view.

Within the Supervisor view to search for a deleted Item:

1. Select Configuration>Items
2. Click the Search button

A simple search page will be displayed

Search Items

Global Options Attributes Full Text

Item No.

Team

Description

Notes

Manufacturer

Search Globals

Deleted Items Only

Owner Options

First Name

Last Name

User Name

Org. Unit

Purchase Order Option

Purchase Order No

Type Options

Item Category

Item Type

Status All Active Inactive

3. Enter a search term
 4. Select the Deleted Item Only option
 5. Click Search
- A list of Items is displayed.
6. For the Item to be re-enabled, select the Item ID#
 7. Click .

NOTE: Service desk now uses service name of the Oracle database configured with ZENworks. While using the Oracle database, if you are unable to connect to ZENworks, see ZENworks Core Admin for the service name.

Importing Items using a .CSV File

To import Items using a .CSV file, a .CSV template, containing all available fields, can be downloaded and populated. The service management system uses a field mapping Wizard to match fields in the template to those in the system. To download the template go to Setup > Item Import > Import. See [Downloading an Item .CSV Template](#) for more information on configuring the .CSV file.

Before Importing a CSV File

For an Item to be successfully imported, the following fields must be mapped:

- ♦ Team/s
- ♦ Status.

The Teams within the .CSV file must be created in the system before they can be associated with an Item as part of a .CSV import. Teams are created by a Supervisor under the User>Teams tab.

Items are imported based on Category (i.e. Hardware, Software, etc.), which must be configured by the Supervisor within the Configuration>Categories tab before conducting a .CSV import. The Categories configuration defines the Details recorded in the Item to be imported into the system. The Administrator must create separate .CSV files based on the Categories configured, that are then individually uploaded into the application.

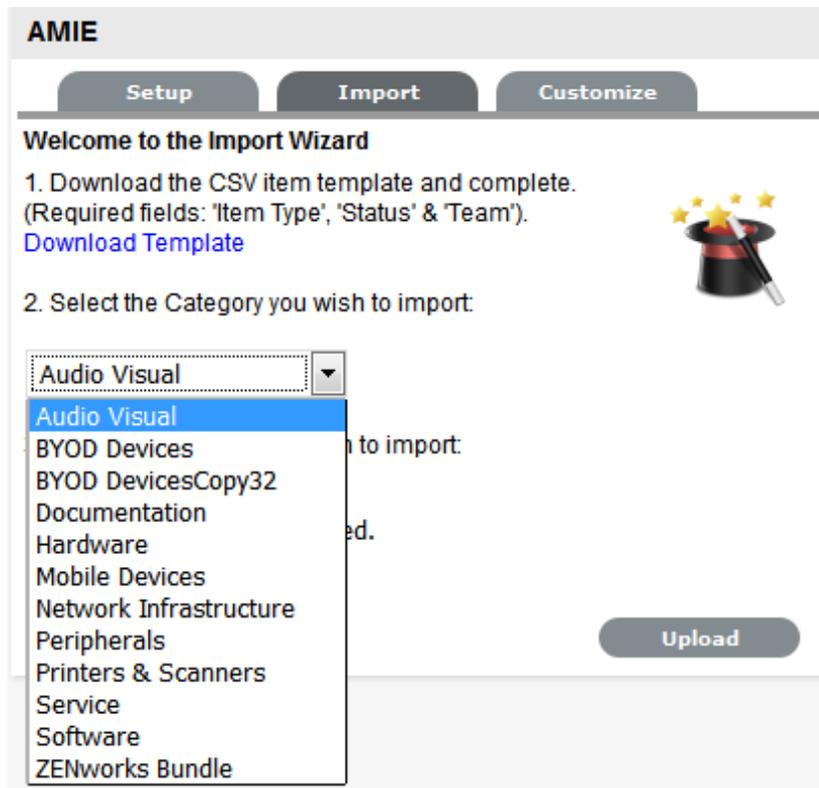
For Items imported with owners, the Username in the .CSV file must match the Username within the support system. If the owner does not exist in the system, the imported Item will become a Global Item.

NOTE: If relationships are to be created between Items upon import, Parent Items should be imported first. If the system generated Item Number is to be used for the Parent Item, it needs to be included in the Parent Item Number field of the Related Items when they are imported.

Importing Items

To import a CSV File using the Import Wizard:

1. Select Setup>AMIE
2. Select the Import tab



To access a template that illustrates the fields the application maps and the data types (see below), click the Download Template link on the Item Import Wizard screen within the Setup>AMIE>Import tab.

The following fields should be visible:

Item Number(Unique char 64),Item Type(char 128),Manufacturer(char 128),Incident Team(char 64),Problem Team(char 64),Change Team(char 64),Request Team(char 64), Company(char 128),Department(char 128),Room(char 64),Username (char 64),Status(char 128),Criticality(char 64)Purchase Date(datetime),Cost(decimal),Field1(char 256),Field2(char 256),Field3(char 256),Field4(char 256),Field5(char 256),Field6(char 256),Field7(char 256),Field8(char 256),Field9(char 256), Field10(char 256),Field11(char 256),Field12(char 256),Field13(char 256),Field14(char 256),Field15(char 256),Field16(char 256),Field17(char 256),Field18(char 256),Field19(char 256),Field20(char 256),Notes(CLOB),Relationship Name(char 256),Parent Item Number(char 64)

The char ### designation in parentheses after each field name signifies what type of data the import utility expects to see in each field. For instance:

- ◆ Item Type (char 128) means that the first name field cannot exceed 128 characters.
- ◆ Fields marked as Unique must be unique in the system.
- ◆ Note the Room details MUST be in the following format: COMPANY-DEPARTMENT;Room

When creating a .CSV file for a Category, to determine the Field number of a configured Custom Field, within the [Category](#) tab of an Item Category select the System defined Ordering option. The field labels will then be listed in sequential order from one to twenty.

3. To import, select the Item Category

The drop-down list consists of all Categories created by the Supervisor in Configuration>Categories.

4. Enter the file location, or use the Browse button

5. Select Upload

The Field Mapping Wizard appears. Fields that can be mapped to the CSV file are available in the drop-down list.

AMIE

Setup Import Customize

Field Mapping Wizard 

Select the fields you wish to map to the internal database records.

General		General	
Item Number	[0] Item Number (Unique char 64)	Company	[8] Company (char 128)
Username	[11] Username (char 128)	Department	[9] Department (char 128)
Item Type	[1] Item Type (char 128)	Room	[10] Room (char 64)
Manufacturer	[2] Manufacturer (char 64)	Service Level	[7] Service Level (char 256)
Incident Team	[3] Incident Team (char 64)	Date Format	MM/dd/yy HH:mm
Problem Team	[4] Problem Team (char 64)	Contract Start Date	[14] Contract Start Date (datetime)
Change Team	[5] Change Team (char 64)	Contract End Date	[15] Contract End Date (datetime)
Request Team	[6] Request Team (char 64)	Purchase Date	[16] Purchase Date (datetime)
Criticality	[13] Criticality (char 64)	Cost	[17] Cost (decimal)
Status	[12] Status (char 64)	Monthly Cost	[18] Monthly Cost (decimal)
		Notes	[59] Notes (CLOB)

Details		Details	
Resolution	[19] Field 1 (char 128)	Serial Number	[22] Field 4 (char 128)
Interface	[20] Field 2 (char 128)		
Display Warranty	[21] Field 3 (char 128)		

Relationships	
Relationship Name	[60] Relationship Name (char 256)
Parent Item Number	[61] Parent Item Number (char 64)

Options Ignore First Line
 Verbose Errors

Fields that do not contain matching system records automatically create new records.

Cancel Import

6. Review and map the fields within the .CSV

Field Mapping Wizard

General

Field Mapping Wizard

Item Number	Unique Item number of the Configuration Item, this can be generated by the system or defined in the .CSV file.
Username	Customer owning the Configuration Item, imported by entering their user name.
Item Type II	Item Type of the Configuration Item.
Manufacturer I	Sets the manufacturer details of the Item.
Incident Team I	Incident Team assigned to the Configuration Item.
Problem Team I	Problem Team assigned to the Configuration Item.
Change Team I	Change Team assigned to the Configuration Item.
Request Team I	Request Team assigned to the Configuration Item
Criticality	Sets the default Criticality (i.e. critical, high, moderate, low, very low) for the Item. Optional.
Status I	Default Configuration Item Status.
Company I	Company owning the Configuration Item.
Department I	Department owning the Configuration Item.
Room I	The location of the Item. The .csv file data format to import this information MUST be: COMPANY-DEPARTMENT;Room
Service Level	Configuration Item assigned SLA.
Date Format	Displays the date format required for the contract details to be imported successfully.
Contract Start Date	Sets the start date of a contract associated with an Item.
Contract End Date	Sets the end date of a contract associated with an Item.
Purchase Date	Date the Item was purchased.
Cost	The cost of the Item.
Monthly Cost	Sets the monthly Service Cost on per month basis for the Item.
Notes	Free text to add notes to the Item. Optional.
Details	
Fields 1 to 20	Custom fields created for the Category are displayed and can be mapped to the Item based on information included in the .CSV file.
Relationships	
Relationship Name	Defines the description of the relationship between the Item set in the following field.

Field Mapping Wizard

Parent Item Number	Identifies the Item with which an Item is related using the Item Number.
Options	
Ignore First Line	Option to ignore first row upon import.
Verbose Errors	Detailed description of any errors that occur during the import process.

/ = Information that needs to exist in the system before the import

/ = Fields that are mandatory

NOTE: If relationships are to be created between Items upon import, Parent Items should be imported first. If the system generated Item Number is to be used for the Parent Item, it needs to be included in the Parent Item Number field of the Related Items when they are imported.

Relationships

Relationship Name [60] Relationship Name (char 256) ▼

Parent Item Number [61] Parent Item Number (char 64) ▼

Fields that do not contain matching system records automatically create new records.

Cancel Import

1. Select the Ignore First Line checkbox if the first line of the imported CSV file has field headings
Leave the checkbox clear if the CSV file begins with usable data.
2. Click Verbose Errors to record a detailed description of any errors that occur during the import
Leaving the box unchecked will return a summarized error report.
3. Select Import to bring into the system the mapped field data
The Item Import screen displays the results of the import.
4. Select Done.

Configuring Items after the Import

During the Item Import, elements that do not exist in the database are created. These are the fields marked with a blue line within the Field Mapping Wizard:

- ◆ Item Type
- ◆ Warranty
- ◆ Organizational Units.

After an import, all Item Types that have been created will need to be further configured.

To complete Item Type configuration:

1. Log in to the Supervisor Portal
2. Select Configuration>Types
3. In the Item Types screen, click on the newly created Item

The Type Information screen appears.

4. Complete the following fields:

Item Type	
Name	Name of the Item Type.
Manufacturer	The manufacturer of the Item Type. New manufacturers can be created and existing manufacturers can be edited and deleted by using the Edit and New buttons that appear beside the drop-down menu of manufacturers.
Item Category	This signifies the type of Item. (Hardware, Software or Service are the default Types, but Users with the Supervisor Role can create more if required).
Identifier	The drop-down list that appears is drawn from the fields defined for the Item Category selected. Although this information is not required, the Identifier is used to differentiate similar Items that may be in use throughout an organization. For example, if an organization uses the same printers for all departments, an Item Category field of "Location" could be configured for the Item Details and this could also be used as a secondary Identifier for Printer Item.
Criticality	<p>Rates the degree of importance of an Item Type within an organization, which can be adjusted on a per Item basis. The 'Impact' of a Request is initially pulled from the Criticality of the Item, but can be adjusted within the request Information screen if required. Requests logged through the Customer Portal, use the Criticality of the Item to set the Priority of the request.</p> <p>The Incident Analyzer, if enabled by the Administrator in Setup>CMS>Incident Analyzer, can apply the Criticality to automatically detect Problems.</p> <p>The minimum Criticality level can also be used to determine the off-line Items that appear on Outages pages, if the Outages pages are enabled by the Administrator in Setup>Privileges>System.</p>
Icon	When the Type details are saved, the Icon selected for the Item Category will be displayed. To customize the icon for the specific Item Type, select the Icon to access the Upload <input type="button" value="Upload"/> or Cancel <input type="button" value="Cancel"/> options.
Unit Price	The per-unit price of the Item Type.
Instance Total	Number of instances owned by the organization.
Assigned	Number of instances assigned to Customers as Items.

Item Type	
Hidden	<p>Select 'On' to ensure Customers cannot view this Item Type within the list in the Customer Portal. If all Item Types use this selection, the Item Type list will be completely removed from the Portal.</p> <p>Items created using Item Types with Hidden enabled, will not allow Customers to generate requests against them in the Customer Portal, nor will they be able to view or receive updates about requests logged by the User against Items with this functionality enabled.</p>
Creation	<p>Enabling this option gives Customers using the portal the ability to create new Items using this Item Type (if they have been granted the ability to create Items by the Administrator in Setup>Privileges>Customer>Create Item. (This option is not displayed when the Hidden option is enabled.)</p>
Ignore Share	<p>Enabling this option overrides the system level option for sharing requests raised against Items of this Type. Requests raised against Items of this Type will not appear in the customer portal when viewing shared requests is enabled.</p>
Add Forum Topic	<p>Create a forum topic using the Item Type Name. This option is only displayed when a new Type is being created.</p>
Incident Default	<p>The Team of Technicians assigned to support Incidents received related to the Item Type. See: Teams</p>
Problem Default	<p>The Team of Technicians assigned to support Problems received related to the Item Type. See: Teams</p>
Change Default	<p>The Team of Technicians assigned to support Change Requests received related to the Item Type. See: Teams</p>
Request Default	<p>The Team of Technicians assigned to support Service Requests received related to the Item Type. See: Teams</p>
Service Level Default	<p>The default service level for the Item Type. When Billing is enabled, service levels without a cost are listed as an option. The service level with an associated cost can be applied when the Item created, this ensures Item contract payment is processed.</p>
Support Levels	<p>All Service Level Agreements assigned to the Item Type, which will be displayed as options when a request is created applying Item that uses this Type template. SLAs listed here, are used within the Costs tab of Service Types to forecast break even points on the Service relative to the number of Users.</p>

Item Type

Find SLA (Name)

To assign multiple SLAs use this option. Click  to view all SLAs or refine the search by entering a specific name. Select the SLA hyperlink to assign the SLA to the Type Information. Click  to clear the search field.

5. Enter the Unit Price for the Item Type. This is an optional field that is used for asset management
See [Finance Role](#).
6. Set the Customer options
7. Assign the default support Teams
8. Assign one or multiple SLAs, as required
9. Click Save
10. Move to the Classification tab to create problem classification for this Item Type.
Click on the Item Type name to continue configuration.

Assigning multiple Companies and Departments to an Item

The .CSV file import facility can also be used to assign more than one Company and Department to an Item, if required. To assign multiple companies within the Company column of the .CSV file, enter the company names separated by a semi-colon (;) If the Company or Companies do not exist in the system, or have been deleted, a new Company will be created.

When importing multiple Departments related to the multiple Companies, the Department related to the Company must be listed in the same order as the Companies and separated by a semi-colon. For example:

Company Field: comp1;comp2

Department Field: dept1:depart2 or ;dept2 or dept1;

Any departments that do not exist in the database or have been deleted, will be created as a result of the .CSV import.

To assign rooms to one of the locations of this multiple Company/Department assignment, the full details of the Company and Department must be entered into the column followed by a semi-colon and the Room number. An example of the Room import format is:

Company Field:CompName1;CompName2

Department Field:Dept1;Dept2

Room Field: CompName1 - Dept1;Room1

Updating Item Information via .CSV

To easily update multiple Items that already exist within system, information can be imported using a .CSV file. For the update to be successful, the Item number in the .CSV file must match the Item number in the system.

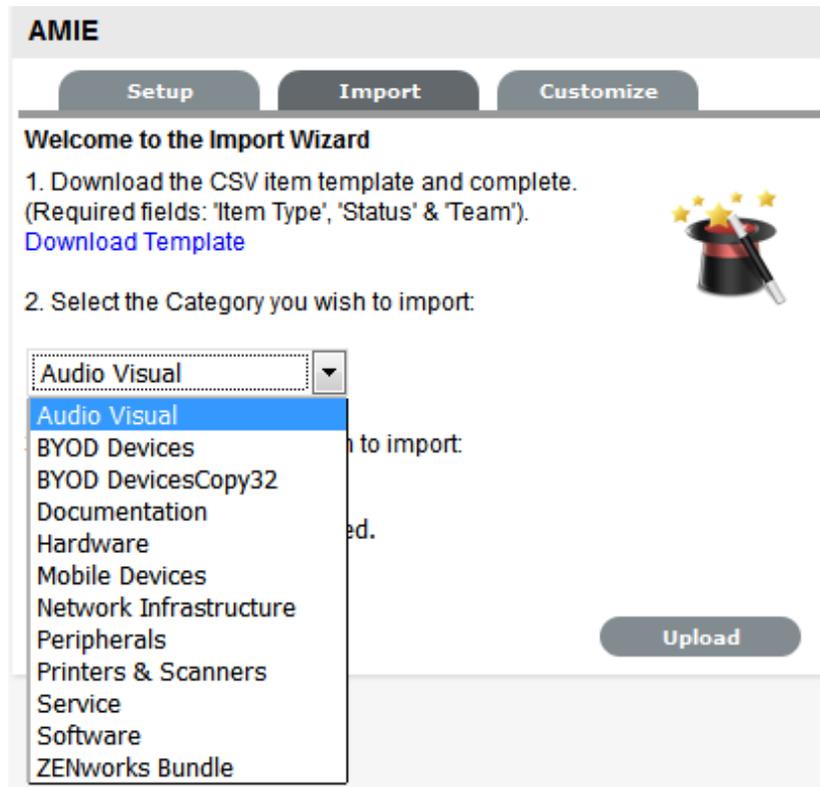
Follow the above *Importing Items* procedure and ensure the Item Number field is mapped correctly. If an Item Number is not included in the .CSV file, a new Item will be created.

Downloading an Item .CSV Template

Downloading an Item .CSV Template

To download and populate the CSV Template for the CMDB Item Import process:

1. Select Setup>AMIE
2. Select the Import tab



To view a template that illustrates the fields the application is looking for and the data types (see below), click the Download Template link on the Item Import Wizard screen within Import tab of Item Import in the Setup tab.

The following fields should be visible:

Item Number(Unique char 64),Item Type(char 128),Manufacturer(char 128),Incident Team(char 64),Problem Team(char 64),Change Team(char 64),Request Team(char 64), Company(char 128),Department(char 128),Room(char 64),Username (char 64),Status(char 128),Criticality(char 64)Purchase Date(datetime),Cost(decimal),Field1(char 256),Field2(char 256),Field3(char 256),Field4(char 256),Field5(char 256),Field6(char 256),Field7(char 256),Field8(char 256),Field9(char 256), Field10(char 256),Field11(char 256),Field12(char 256),Field13(char 256),Field14(char 256),Field15(char 256),Field16(char 256),Field17(char 256),Field18(char 256),Field19(char 256),Field20(char 256),Notes(CLOB),Relationship Name(char 256),Parent Item Number(char 64)

The char ### designation in parentheses after each field name signifies what type of data the import utility expects to see in each field. For instance:

- ♦ Item Type (char 128) means that the first name field cannot exceed 128 characters.

- ♦ Fields marked as Unique must be unique in the system.
 - ♦ Note the Room details MUST be in the following format: COMPANY-DEPARTMENT;Room
- To import, select the Item Category
The drop-down list consists of all Categories created by the Supervisor in Configuration>Categories.
 - Enter the file location, or use the Browse button
 - Select Upload
The Field Mapping Wizard appears. Fields that can be mapped to the CSV file are available in the drop-down list.

AMIE

Setup
Import
Customize

Field Mapping Wizard



Select the fields you wish to map to the internal database records.

<div style="background-color: #f0f0f0; padding: 2px; border-bottom: 1px solid #ccc; margin-bottom: 5px;">General</div> <table style="width: 100%; border-collapse: collapse;"> <tr><td style="padding: 2px;">Item Number</td><td style="padding: 2px;">[0] Item Number (Unique char 64) ▼</td></tr> <tr><td style="padding: 2px;">Username</td><td style="padding: 2px;">[11] Username (char 128) ▼</td></tr> <tr><td style="padding: 2px;">Item Type</td><td style="padding: 2px;">[1] Item Type (char 128) ▼</td></tr> <tr><td style="padding: 2px;">Manufacturer</td><td style="padding: 2px;">[2] Manufacturer (char 64) ▼</td></tr> <tr><td style="padding: 2px;">Incident Team</td><td style="padding: 2px;">[3] Incident Team (char 64) ▼</td></tr> <tr><td style="padding: 2px;">Problem Team</td><td style="padding: 2px;">[4] Problem Team (char 64) ▼</td></tr> <tr><td style="padding: 2px;">Change Team</td><td style="padding: 2px;">[5] Change Team (char 64) ▼</td></tr> <tr><td style="padding: 2px;">Request Team</td><td style="padding: 2px;">[6] Request Team (char 64) ▼</td></tr> <tr><td style="padding: 2px;">Criticality</td><td style="padding: 2px;">[13] Criticality (char 64) ▼</td></tr> <tr><td style="padding: 2px;">Status</td><td style="padding: 2px;">[12] Status (char 64) ▼</td></tr> </table> <div style="background-color: #f0f0f0; 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Cancel
Import

6. Review and map the fields within the .CSV

Field Mapping Wizard

General

Item Number	Unique Item number of the Configuration Item, this can be generated by the system or defined in the .CSV file.
Username	Customer owning the Configuration Item, imported by entering their user name.
Item Type II	Item Type of the Configuration Item.
Manufacturer I	Sets the manufacturer details of the Item.
Incident Team I	Incident Team assigned to the Configuration Item.
Problem Team I	Problem Team assigned to the Configuration Item.
Change Team I	Change Team assigned to the Configuration Item.
Request Team I	Request Team assigned to the Configuration Item
Criticality	Sets the default Criticality (i.e, critical, high, moderate, low, very low) for the Item. Optional.
Status I	Default Configuration Item Status.
Company I	Company owning the Configuration Item.
Department I	Department owning the Configuration Item.
Room I	The location of the Item. The .csv file data format to import this information MUST be: COMPANY-DEPARTMENT;Room
Service Level	Configuration Item assigned SLA.
Date Format	Displays the date format required for the contract details to be imported successfully.
Contract Start Date	Sets the start date of a contract associated with an Item.
Contract End Date	Sets the end date of a contract associated with an Item.
Purchase Date	Date the Item was purchased.
Cost	The cost of the Item.
Monthly Cost	Sets the monthly Service Cost on per month basis for the Item.
Notes	Free text to add notes to the Item. Optional.
Details	
Fields 1 to 20	Custom fields created for the Category are displayed and can be mapped to the Item based on information included in the .CSV file.

Relationships

Field Mapping Wizard

Relationship Name	Defines the description of the relationship between the Item set in the following field.
Parent Item Number	Identifies the Item with which an Item is related using the Item Number.
Options	
Ignore First Line	Option to ignore first row upon import.
Verbose Errors	Detailed description of any errors that occur during the import process.

/ = Information that needs to exist in the system before the import

/ = Fields that are mandatory

NOTE: If relationships are to be created between Items upon import, Parent Items should be imported first. If the system generated Item Number is to be used for the Parent Item, it needs to be included in the Parent Item Number field of the Related Items when they are imported.

Relationships

Fields that do not contain matching system records automatically create new records.

Relationship Name [60] Relationship Name (char 256) ▼

Parent Item Number [61] Parent Item Number (char 64) ▼

Cancel Import

1. Select the Ignore First Line checkbox if the first line of the imported CSV file has field headings. Leave the checkbox clear if the CSV file begins with usable data.
2. Click in Verbose Errors for detailed descriptions of any errors that may occur during the import. Leaving the box unchecked will return abbreviated errors.
3. Select Import to bring into the system the mapped field data. The Item Import screen displays the results of the import.
4. Select Done.

Configuring Items after the Import

During the Item Import, elements that do not exist in the database are created. These are the fields marked with a blue line within the Field Mapping Wizard:

- ◆ Item Type
- ◆ Warrantly
- ◆ Organizational Units.

After an import, all Item Types that have been created will need to be further configured.

To complete Item Type configuration:

1. Log in to the Supervisor Portal

2. Select Configuration>Types
3. In the Item Types screen, click on the newly created Item
The Type Information screen appears.
4. Complete the following fields:

Item Type	
Name	Name of the Item Type.
Manufacturer	The manufacturer of the Item Type. New manufacturers can be created and existing manufacturers can be edited and deleted by using the Edit and New buttons that appear beside the drop-down menu of manufacturers.
Item Category	This signifies the type of Item. (Hardware, Software or Service are the default Types, but Users with the Supervisor Role can create more if required).
Identifier	The drop-down list that appears is drawn from the fields defined for the Item Category selected. Although this information is not required, the Identifier is used to differentiate similar Items that may be in use throughout an organization. For example, if an organization uses the same printers for all departments, an Item Category field of "Location" could be configured for the Item Details and this could also be used as a secondary Identifier for Printer Item.
Criticality	<p>Rates the degree of importance of an Item Type within an organization, which can be adjusted on a per Item basis. The 'Impact' of a Request is initially pulled from the Criticality of the Item, but can be adjusted within the request Information screen if required. Requests logged through the Customer Portal, use the Criticality of the Item to set the Priority of the request.</p> <p>The Incident Analyzer, if enabled by the Administrator in Setup>CMS>Incident Analyzer, can apply the Criticality to automatically detect Problems.</p> <p>The minimum Criticality level can also be used to determine the off-line Items that appear on Outages pages, if the Outages pages are enabled by the Administrator in Setup>Privileges>System.</p>
Icon	When the Type details are saved, the Icon selected for the Item Category will be displayed. To customize the icon for the specific Item Type, select the Icon to access the Upload <input type="button" value="Upload"/> or Cancel <input type="button" value="Cancel"/> options.
Unit Price	The per-unit price of the Item Type.
Instance Total	Number of instances owned by the organization.

Item Type	
Assigned	Number of instances assigned to Customers as Items.
Hidden	<p>Select 'On' to ensure Customers cannot view this Item Type within the list in the Customer Portal. If all Item Types use this selection, the Item Type list will be completely removed from the Portal.</p> <p>Items created using Item Types with Hidden enabled, will not allow Customers to generate requests against them in the Customer Portal, nor will they be able to view or receive updates about requests logged by the User against Items with this functionality enabled.</p>
Creation	<p>Enabling this option gives Customers using the portal the ability to create new Items using this Item Type (if they have been granted the ability to create Items by the Administrator in Setup>Privileges>Customer>Create Item. (This option is not displayed when the Hidden option is enabled.)</p>
Ignore Share	<p>Enabling this option overrides the system level option for sharing requests raised against Items of this Type. Requests raised against Items of this Type will not appear in the customer portal when viewing shared requests is enabled.</p>
Add Forum Topic	<p>Create a forum topic using the Item Type Name. This option is only displayed when a new Type is being created.</p>
Incident Default	<p>The Team of Technicians assigned to support Incidents received related to the Item Type. See: Teams</p>
Problem Default	<p>The Team of Technicians assigned to support Problems received related to the Item Type. See: Teams</p>
Change Default	<p>The Team of Technicians assigned to support Change Requests received related to the Item Type. See: Teams</p>
Request Default	<p>The Team of Technicians assigned to support Service Requests received related to the Item Type. See: Teams</p>
Service Level Default	<p>The default service level for the Item Type. When Billing is enabled, service levels without a cost are listed as an option. The service level with an associated cost can be applied when the Item created, this ensures Item contract payment is processed.</p>

Item Type

Support Levels

All Service Level Agreements assigned to the Item Type, which will be displayed as options when a request is created applying Item that uses this Type template. SLAs listed here, are used within the Costs tab of Service Types to forecast break even points on the Service relative to the number of Users.

Find SLA (Name)

To assign multiple SLAs use this option. Click  to view all SLAs or refine the search by entering a specific name. Select the SLA hyperlink to assign the SLA to the Type Information. Click  to clear the search field.

5. Enter the Unit Price for the Item Type. This is an optional field that is used for asset management
See [Finance Role](#).
6. Set the Customer options
7. Assign the default support Teams
8. Assign one or multiple SLAs, as required
9. Click Save
10. Move to the Classification tab to create problem classification for this Item Type.
Click on the Item Type name to continue configuration.

Assigning multiple Companies and Departments to an Item

The .CSV file import facility can also be used to assign more than one Company and Department to an Item, if required. To assign multiple companies within the Company column of the .CSV file, enter the company names separated by a semi-colon (;) If the Company or Companies do not exist in the system, or have been deleted, a new Company will be created.

When importing multiple Departments related to the multiple Companies, the Department related to the Company must be listed in the same order as the Companies and separated by a semi-colon. For example:

Company Field: comp1;comp2

Department Field: dept1:dept2 or ;dept2 or dept1;

Any departments that do not exist in the database or have been deleted, will be created as a result of the .CSV import.

To assign rooms to one of the locations of this multiple Company/Department assignment, the full details of the Company and Department must be entered into the column followed by a semi-colon and the Room number. An example of the Room import format is:

Company Field:CompName1;CompName2

Department Field:Dept1;Dept2

Room Field: CompName1 - Dept1;Room1

Updating Item Information via .CSV

To easily update multiple Items that already exist within system, information can be imported using a .CSV file. For the update to be successful, the Item number in the .CSV file must match the Item number in the system.

Follow the above *Importing Items* procedure and ensure the Item Number field is mapped correctly. If an Item Number is not included in the .CSV file, a new Item will be created.

1.4 Basic Procedures

- ◆ Section 1.4.1, “Mandatory Fields,” on page 91
- ◆ Section 1.4.2, “Creating an Element,” on page 92
- ◆ Section 1.4.3, “Editing an Element,” on page 92
- ◆ Section 1.4.4, “Deleting an Entry,” on page 92
- ◆ Section 1.4.5, “Exporting to PDF and Excel,” on page 93
- ◆ Section 1.4.6, “Formatting Print Views,” on page 93
- ◆ Section 1.4.7, “List Views,” on page 94
- ◆ Section 1.4.8, “List View Options for all Request Types,” on page 97
- ◆ Section 1.4.9, “List Filters,” on page 112
- ◆ Section 1.4.10, “Changing Roles,” on page 112
- ◆ Section 1.4.11, “Buttons,” on page 113
- ◆ Section 1.4.12, “Online Help,” on page 118
- ◆ Section 1.4.13, “Remember Login,” on page 118
- ◆ Section 1.4.14, “Working on requests,” on page 119

All sections throughout the application use a uniform system for creating, editing and deleting elements. Whether you are working with requests, Customers, Items or Item Types, the procedure for creating, editing or deleting existing elements is the same.

1.4.1 Mandatory Fields

When entering details relating to any element throughout the system, required information is marked with a *I*.

The screenshot displays a web form titled "Customer Information" with three tabs: "Contact", "Aliases", and "Items". The "Access" section is active, showing a "Title" dropdown menu. Below it are three text input fields: "First Name", "Last Name", and "Username". Each of these three fields has a red vertical bar to its left, indicating it is a mandatory field. The "First Name" field also has the text "Mandatory field" written in red to its right.

/ Denotes Mandatory fields

1.4.2 Creating an Element

To create an element:

1. Navigate to the appropriate section

For example, if you want to create a Customer, navigate to the User>Customers section.

2. Click **New** in the upper left-hand corner of the list of Customers
This will open a new Customer window.
3. Fill in the appropriate details
4. Click **Save**.

The new Customer now exists in the system and will appear in the list of Customers.

1.4.3 Editing an Element

To edit an element:

1. Navigate to the appropriate section
2. Click the Entry link in the list

For instance, to edit a Customer, navigate to the User>Customers section and click on the Customer name hyperlink. This will open up the Customer's details screen.



Customer Name	Email Address	Phone	Org. Unit	Country	Roles	Web Access
Michael Angelo	michael@nsd.com		Micro Focus - Head Office		Customer	Enabled
Jason Blackett	jason@nsd.com		Micro Focus - Information Technology		Customer	Enabled

3. Click **Edit** in the upper-left corner of the window to enter Edit mode
4. Update the necessary information
5. Click **Save**.

The changes will now take effect and the User will be returned to the list.

1.4.4 Deleting an Entry

To delete an entry:

1. Navigate to the appropriate section

NOTE: Technicians do not have the ability to delete requests or Customers

1. Click the link in the list corresponding to the entry to be deleted

For instance, to delete a Customer, navigate to the User>Customers section and click on the Customer you want to delete. The Information screen opens.



2. Click **Edit** in the upper-left corner of the window to enter Edit mode
3. Click **Delete** at the bottom of the section.
The entry is now deleted and the User will be returned to the list.

1.4.5 Exporting to PDF and Excel

Most lists within the system can be exported to PDF and/or Excel. This functionality is available wherever the PDF and/or Excel buttons are visible.

NOTE: To customize the view of an Excel export, create a list view with the preferred columns, use the view and select the Excel button. See [List Views](#) for more information on customizing a list.

1.4.6 Formatting Print Views

Enable the print background setting on your web browser for better formatted and more User-friendly hard copies of request summary screens print views. Using Internet Explorer this setting is found in: Tools>Internet Options>Advanced>Printing>Print background colors and images.

1.4.7 List Views

Application List Views are pre-sorted by ID #, and default to display ten Incidents per batch. A List can be re-sorted by clicking on a column header, and the number of elements displayed per batch can be changed using the Display pop-up option.

List Views allow Users to customize the list displayed for each screen within the application. When a List View is created, the screen editor will display only the relevant columns for the module being customized. For example, when creating an Item List View, the available columns will include only Item information.

The system includes at least one default List View for each screen within the application. These Views cannot be edited, however additional Views can be created.

To access details regarding the List View field options throughout the application, refer to:

- ◆ [Home, Operations and Change tab](#)
- ◆ [Configuration tab](#)
- ◆ [Users tab](#)
- ◆ [Knowledge tab.](#)

Create a List View:

As an example we will create a List View for the Incident screen.

1. Select Operations>Incident
The Incidents screen appears
2. Select  available on the far right of the screen
3. Click New

Views Editor

Name	<input type="text"/>
Shared	<input checked="" type="radio"/> No <input type="radio"/> By Role <input type="radio"/> By Team
Column 1	<input type="text" value="Request #"/>
Column 2	<input type="text" value="Not Included"/>
Column 3	<input type="text" value="Not Included"/>
Column 4	<input type="text" value="Not Included"/>
Column 5	<input type="text" value="Not Included"/>
Column 6	<input type="text" value="Not Included"/>
Column 7	<input type="text" value="Not Included"/>
Column 8	<input type="text" value="Not Included"/>
Column 9	<input type="text" value="Not Included"/>
Column 10	<input type="text" value="Not Included"/>
Column 11	<input type="text" value="Not Included"/>
Column 12	<input type="text" value="Not Included"/>
Column 13	<input type="text" value="Not Included"/>
Column 14	<input type="text" value="Not Included"/>
Column 15	<input type="text" value="Not Included"/>

4. Enter the View Name and specify if the View is to be shared by other Users or between Team members
 Shared Views allow other Users to apply the List View to their screen but does not permit them to edit it.
5. Select at least 8 columns
 This only applies to the request list screens, all other screens require at least 6 columns.
6. Click Save.

NOTE: Create a List View that includes New Tasks and New Notes to use as the default request screen in order to have a visual cue when new Notes and requests are created.

List Views						
New		Duplicate		Done		
<input type="checkbox"/> View Name	<input type="checkbox"/> Columns	Owner	Shared	Default	Use View	<input type="checkbox"/>
<input type="checkbox"/> System Incident View	12	System User			System Incident View	
<input type="checkbox"/> Service Delivery View	12	System User			Service Delivery View	

1 - 2 of 2 Results

Selecting a List View as the Default View

To use the same List View each time a screen is displayed, select the List View to be the default view. To do this:

1. Select , displayed on the far right of the screen
2. Click the button in the Default column
3. The icon will then change to a , indicating that it has become the default
4. Select Done to view this List.

From this point, this will be the default List View for the selected screen.

Displaying a Different List View

To use a different List View:

1. Select , displayed on the far right of the screen
2. Select the link in the Use View column.

Editing a List View Column

To edit a List View, and change the columns:

1. Select , displayed on the far right of the screen
2. Select the link in the View Name column
3. Make the required changes
4. Click Save.

Duplicating a List View

To fast-track the creation of similar List Views, a List View can be duplicated. To duplicate a List View:

1. Select , available on the far right of the screen
2. Click the checkbox beside the View Name to duplicate
3. Click the Duplicate button

The List View Editor appears with the columns of the original List View.
4. Complete the List View name

5. Modify the columns as required
6. Click Save.

To access details regarding the List View information options throughout the application, refer to:

- ♦ [Home, Operations and Change tab](#)
- ♦ [Configuration tab](#)
- ♦ [User tab](#)
- ♦ [Knowledge tab.](#)

1.4.8 List View Options for all Request Types

List View Options for all Request Types

The List View options are derived from the database fields and can be customized by selecting  within the My Tasks Home tab, Service Request, Incident or Problems screens within the Operations tab and the Change tab list view.

The options within the Home, Operations and Change tabs are detailed in the following table:

	Description
# Attachments	Displays the total number of Attachments assigned to the request.
# Notes	Displays the total number of Notes assigned to the request.
% SLA Remaining	Displays the percentage of time available before the SLA expires.
Classification	Shows the Classification assigned to the request.
Client Room	Displays the Room where the Customer can be located.
Close Date	Specifies when the request was first moved into an Exit State of the Workflow.
Created	The date when the request was first logged with the system.
Customer	The name of the person for whom the request was logged in the system.
Customer Item	The identification number of the Configuration Item associated with the Customer. (This is especially relevant when Item Shadowing is enabled for the Customer Portal and a request is logged against an Item that is different to the Customer's Item.)
Customer Item Type	The Item Type associated with the Customer Item.
Customer Solution	Shows the Customer Note when they use the Close option on the Customer Portal.
Description	Displays the initial information logged for the Customer's request.

	Description
Due Date	Typically based in the SLA and Priority assigned to the request, but in some cases may be manually overwritten.
Escalation	 is visible when the Escalation option is On for the request.
Group	Displays the Group identification number, if the request is assigned to a request group.
IP	Shows the ITIL process that the request belongs to:  Incident Management;  Problem Management;  Change Management;  Request Fulfillment
Identifier	Shows the Identifier field information of the Item assigned to the request.
Impact	Shows the Impact associated with the request. This is usually derived from the Criticality of the Item, but can be adjusted manually on a request.
Item	Shows the identifying number of the Item assigned to the request.
Item Category	Shows the Category name of the Item assigned to the request.
Item Criticality	States the Criticality of the Item as defined in the CMDB.
Item Room	Displays the Room details to which the Item is assigned.
Item Status	Displays the stage of the Item Lifecycle that the Item is assigned.
Item Type	Shows the Type name of the Item assigned to the request.
Last Action	Details the date that action was last recorded against the request.
Layer	Details the Escalation Layer/level or work group assigned to the request.
Logged Time (mins)	Shows the total time recorded against the request.
Logged by	Shows the name of the person logged the request with the system.
New Note	 is visible when a new Note is added to a request and has not been opened by the assigned Technician.

	Description
New Task	 is displayed when a new request is added to the List View.
Number of Affected Users	Displays the number of Customers associated with the Item assigned to the request.
Open Date	Details the date the request was first logged in the system.
Open Time	Details the time the request was first logged in the system.
Org. Unit	The name of the Organizational Unit to which the Customer is assigned.
Priority	Shows the Priority setting for the request.
Request#	The identifying number for the request.
Restore Date	Shows the date the request was moved into a Workflow State where the SLA Restoration option is set to Yes.
SLA	Displays the Service Level Agreement assigned to the request.
Source	Displays if the request was created via Email, Portal, Widget, Phone (Technician) or Web Service.
Status	Shows the stage of the request Workflow that the request is assigned.
Subject	Shows content entered in the Subject field of a request. Usually derived for the Subject line of requests created via email, if not populated manually.
Team	Shows the Team assigned to the request.
Technician	Displays the name of the Technicians assigned to the request.
Urgency	Shows the Urgency associated with the request.
Warning Sent	 is visible if an SLA Warning has been sent to the Technician assigned to the request.
Workflow	Details the Workflow assigned to the request.

If Custom Fields have been enabled for a Request Type in Admin>Setup>Custom Fields, they will also be available in the Views Editor drop-down list options.

List View Options: Configuration Tab

The List View options are derived from the database fields and can be customized by selecting  within the Configuration tab.

The options within the Configuration Tab are outlined in the following table.

	Description
# Users	Displays the number of Users assigned to the Item.
% SLA Uptime	Displays the percentage uptime expectation of the SLA assigned to the Item.
% Uptime	Shows the actual uptime of the Item, based on the time the Item is associated with Active Lifecycle States.
Avg Repair Time	Entries displayed here are automatically calculated based on the average length of time an Item is offline.
Avg Time to Fail	Figures displayed here are automatically calculated based on the average time between an Item being offline.
Change Team	Shows the Change Team assigned to the Item.
Child R'Ships	Displays the number of Child Relationships associated with the Item.
Contract	Displays the Contract Number associated with the Item.
Contract End Date	Displays the date a Service Contract period ended.
Contract Expiry	Shows the date that a Service Contract is due to expire.
Cost	Displays the value entered in the Costs field.
Criticality	States the Criticality of the Item as defined in the CMDB.
Current Month Costs	Uses the Charges figure within the Service Item Costs tab, multiplied by the number of Users and days of month passed, to calculate the month to date cost figure.
Current Month Revenue	Uses the Revenues figure within the Service Item Costs tab, multiplied by the number of Users and days of month passed, to calculate the month to date revenue figure.
Customers	Lists Customers assigned to the Item.
Deleted Date	Shows the date the Item was deleted from the CMDB.
Depreciated Value	Displays the figure entered in the Depreciated Value.
Identifier	Shows the Identifier field information of the Item assigned to the request.
Incident Team	Shows the Incident Team assigned to the Item.
Item Category	Shows the Category associated with the Item.
Item No.	Displays the identifying number for the Item.
Item Type	Shows the Item Type associated with the Item.
Manufacturer	Displays the Manufacturer name.

	Description
Open Requests	Shows the number of requests assigned an Active Status, associated with the Item.
Org. Units	Lists the Org. Units associated to the Item.
Parent R'Ships	Displays the number of Parent Relationships associated with the Item.
Previous Month Costs	A reference figure for an average monthly cost, based on the previous months costs for the Service Item.
Previous Month Revenue	A reference figure for an average monthly revenues, based on the previous months revenue for the Service Item.
Problem Team	Shows the Problem Team assigned to the Item.
Purchased	Displays the date entered in the Purchased field.
Request Team	Shows the Service Request Team assigned to the Item.
Room	Displays the Room associated with the Item.
Service Components	For Service Items, the Item Number and Type is displayed for other Service Items related as Children for this Item.
Service Level	Shows the Service Level Agreement assigned to the Item.
Status	Displays the stage of the Item Lifecycle that the Item is assigned.

List View Options: Users Tab

The List View options are derived from the database fields and can be customized by selecting  within the Customers, Organizational Units, Partner Organizations and Users tab.

The options within the Users Tab are outlined in the following tables:

Customers List View options:

Customers	Description
Contract #	Displays the Contract Number associated with the Customer.
Country	Shows the Country assigned to the Customer's account.
Custom 1 to 5	Shows the Custom Fields that have been configured in the Admin>Setup>Custom Fields tab for Customer Information.
Customer Name	Displays the Customer's name.
Date Added	Displays the date the Customer account was first created.

Customers	Description
Email Address	Shows the Customer's email address as a link that can be clicked to open a New Message email window.
Email Locale	Displays the language file associated with the Customer for automated system correspondence.
FAX	Includes the Customer's facsimile number.
Last Login	States the time and date when the Customer last logged into the system.
Last Logout	States the time and date when the Customer last logged out of the system.
Ldap Source	When multiple LDAP servers are synchronized with the system, this will display the LDAP details from where the Customer information is sourced.
Line Manager	Shows the name of Manager User associated with the Customer, which maybe relevant when seeking approvals for Service or Change Requests.
Local Time	Displays the local time for the Customer.
Mobile	Includes the Customer's mobile number.
Notes	Displays information recorded in the Notes field of the Customer Information screen.
Open Requests	Shows the number of requests assigned an Active Status, logged by the Customer.
Org. Unit	Displays the Organizational Unit assigned to the Customer.
Owned Items	Lists the Item's assigned to the Customer by showing the Item Numbers.
Pager	Includes the Customer's pager details.
Phone	Includes the Customer's telephone number.
Roles	Lists the Roles the Customer has been assigned within the system
Room	Displays the Room assigned to the Customer.
User Name	Displays the User Name access credentials for the Customer's account.
Web Access	Shows the Customer setting for the Web Access option.

Organizational Units and Partner Organizations List View options:

Org. Units	Description
# Customers	Shows the number of Customers associated with the Org. Unit.
City	Shows the City details for the Org. Unit.

Org. Units	Description
Contract #	Displays the Contract Number associated with the Org. Unit.
Country	Shows the contact telephone number for the Org. Unit.
Custom 1 to 5	Shows the Custom Fields that have been configured in the Admin>Setup>Custom Fields tab for Org. Unit Information.
Name	Details the Organizational Unit's name.
Org Unit Email	Shows the Org Unit's email address as a link that can be clicked to open a New Message email window.
Phone	Shows the contact telephone number for the Org. Unit.
Primary Contact	Shows the name of the Customer who has been assigned as the point of contact for the Organizational Unit.
Primary Contact Email	Shows the Primary Contact's email address as a link that can be clicked to open a New Message email window.
Service Level	Displays the Service Level Agreement assigned to the Org. Unit.
State	Displays the State information for the Org. Unit.
Website	Displays the Org. Unit's Website details.
Zip	Shows the contact telephone number for the Org. Unit.

Users List View options:

Users	Description
Active Requests	Shows the number of requests assigned an Active Status, allocated to the User.
Available	<p>Includes a visual icon to easily identify if the User is available within the system for request allocation:</p> <p> : The User is not on leave and is available for request assignment based on their assigned work hours.</p> <p> : The User is not on leave but is not available for request assignment based on their assigned work hours.</p> <p> : The User has the On Vacation option enabled.</p>
Classifications	Lists any Item Classifications that have been assigned to the User within the Skills tab.
Custom 1 to 5	Shows the Custom Fields that have been configured in the Admin>Setup>Custom Fields tab for User Information.

Users	Description
Date Added	Displays the date the Customer account was first created.
Default Items	Lists any Items that have been assigned to the User within the Skills tab.
Default Portal	For Users assigned multiple Roles within the system, this field will display which Portal the User accesses by default when they log into the system.
Email Address	Shows the User's email address as a link that can be clicked to open a New Message email window.
FAX	Includes the User's facsimile number.
Last Login	States the time and date when the User last logged into the system.
Last Logout	States the time and date when the User last logged out of the system.
Ldap Source	When multiple LDAP servers are synchronized with the system, this will display the LDAP details from where the User information is sourced.
Line Manager	Shows the name of Manager User associated with the User, which maybe relevant when seeking approvals for Service or Change Requests.
Mobile	Includes the User's mobile number.
Name	Shows the User's name.
Pager	Includes the User's pager details.
Phone	Shows the contact telephone number for the User.
Processes	Lists the ITIL processes the User has access to within the system.
Roles	List the Roles the User has been assigned within the system.
Supervisor	Shows the assigned Supervisor for Users assigned a Technician or Partner Role.
Teams	Lists the service Teams the User has been assigned to.
Username	Displays the User Name access credentials for the User's account.

Custom Fields

Custom Fields

The Custom Fields function allows screens in the system to be adapted to meet specific requirements of an organization, as additional fields can be created for different parts of the application.

Custom fields can be set for different system screens and include the option to select:

- ◆ Data type
- ◆ Style
- ◆ Defining if the field is required or includes a description
- ◆ Determining whether it can be viewed or edited by the Customer (Incident, Change and Service Request Custom fields only.)

NOTE: A maximum of 5 fields is allowed for each option.

Enabling a Custom Field

To enable a Custom Field:

1. Select Setup>Custom Fields

The Custom Fields screen appears.

2. From the Category Filter drop-down list select the screen option

The displayed list includes all screens where custom fields can be added.

Field	Data Type	Style
Custom 1	String	Text
Custom 2	String	Text
Custom 3	String	Text
Custom 4	String	Text
Custom 5	String	Text

Custom Fields

Custom Field Locations

Articles	Additional field for Articles in the Knowledge Base.
Change Requests	Additional field for a Change Request.
Customers	Additional field for Customer Information.

Custom Fields	Custom Field Locations
Groups	Additional field for Service Request, Incident, Problem and Change Groups.
Incidents	Additional field for Incident Information.
Invoices	Additional field for Invoices. (Option visible when Billing>Invoices have been enabled for the system.)
Org Units	Additional field for an Organizational Unit.
Partner Orgs	Additional field for Partner Organization.
LDAP/ADS Accounts	Customized LDAP/ADS fields can be used to map to a Directory Server when importing user account details. See Authentication .
Problems	Additional field for Problem details.
Releases	Additional field for Release Management details.
Service Requests	Additional field for Service Request information.
SLAs	Additional fields for Service Level Agreement Information screen.
Users	Additional field for the Users Information screen.
Purchase	Additional field for Purchase Orders. (Option visible when Billing>Purchase Orders have been enabled for the system.)

NOTE: Problem, Change, Release and Service Requests are in Service Manager only

- To define a custom field, click on the appropriate field label hyperlink
An editable window appears.

- Toggle the Active field to Yes
Once activated, a list of options is displayed.

Custom Fields

Custom Field

Field Label i

Category

Active Yes No

Required Yes No

Data Type ▼

Style Text List

Unique Value

Default Value

Input Validation Yes No

Enable Description Yes No

Options	Description
Field Label	<p>Edit the Field Label by entering the relevant name. (Required.)</p> <p>NOTE: The label entered within this field is applied to the English UI. For it to appear in another language, configure this label in the Setup>Localization>Content tab.</p>
Active	<p>Defines the Custom Field visibility.</p>
Required	<p>Defines if the field is mandatory when displayed.</p>
Data Type	<p>The format required for the field.</p> <p>Select the data type from the following:</p> <ul style="list-style-type: none"> ◆ String (Text or List) ◆ Number-Custom Field that requires a number ◆ Boolean (Radio Buttons) ◆ Date-Custom Field that requires a value in a date format ◆ Currency- A currency can be defined for the Field ◆ Hyperlink - A URL can be included in the field.
Style	<p>From the options provided, the way the data type will be displayed.</p> <ul style="list-style-type: none"> ◆ String custom field - either an open text field or a list, or ◆ Boolean custom field - uses radio buttons to define Yes/No or True/False.

Options	Description
Unique Value	When active, the system prevents the duplication of data within the customized field.
Input Validation	When enabled the Input Mask and User Mask can be defined. <i>Input Mask</i> : A regular expression to use for data validation of values entered by a User (i.e., Zip/Post Code, telephone no.) <i>User Mask</i> : A User Friendly representation of the Input Mask that Customers can understand should it appear in a validation error message.
Enable Description	When enabled, a Description field appears that allows the User to enter details of what information the field is expected to capture. These details are accessible next to the custom field on the relevant screen.

Data Type - List

When the Data Type String - List is selected the List Contents field is displayed, which provides the facility to create a drop down list to be created as options within the field.

To create a new list entry within the List Contents field:

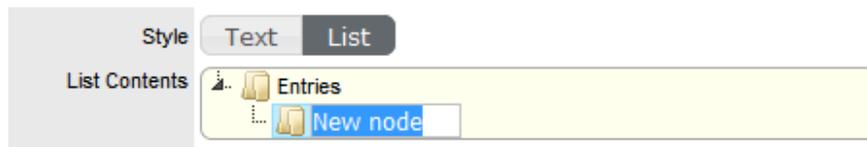
1. Right click the Entries link

The Create option is displayed



2. Click Create

A New node link displayed

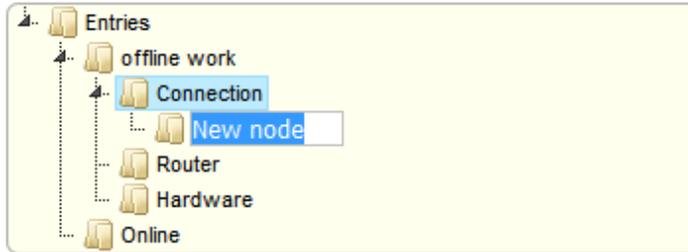


3. Enter the name of the field
4. Click outside the field to save the entry

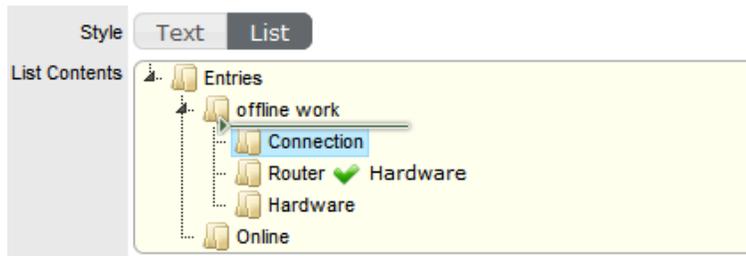


5. Repeat this process until all list entries have been added

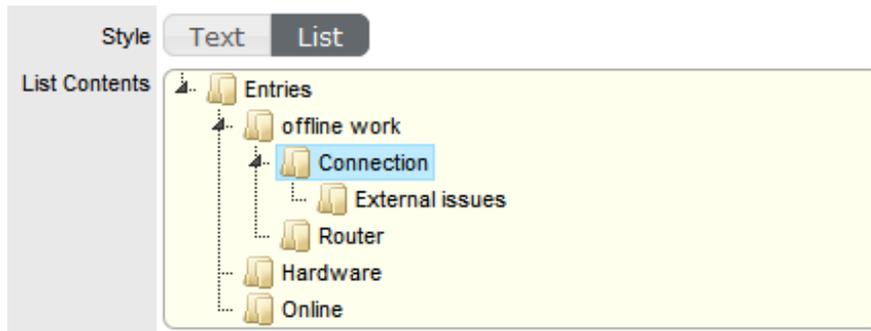
To create a nested list, right click on the relevant list entry and repeat the above process.



6. To move an existing entry to a new position, select the entry, then drag and drop the entry into its new location



7. When all the relevant details have been defined for the custom field, click Save.



Custom Fields for Incidents, Change and Service Requests

If a custom field is enabled for an Incident, Change or Service Request, additional options are displayed. These include:

	Description
Customer Visible	The custom field is visible in the Customer Portal, otherwise it can only be viewed via Technician access.
Customer Editable	Allows the Customer to edit the content within this field.
Default Value	The custom field will automatically be populated with the value entered here when a request is created. This value can be edited within the request screen, if required.

Custom Fields

Custom Field

Field Label ⓘ

Category

Active Yes No

Required Yes No

Customer Visible Yes No

Customer Editable Yes No

Data Type ▼

Style Text List

Unique Value

Default Value

Input Validation Yes No

Enable Description Yes No

Description

NOTE: If Customer Visibility is set to No for a required field, then a Default Value must be defined. This will enable the Customer to save a new request without seeing the relevant field.

LDAP/ADS Accounts Custom Fields

The LDAP/ADS custom fields are used to define specific Customer and User fields configured within LDAP/ADS. The custom fields for Customers and Users are completed when Users and Customers are entered manually or imported using a .CSV file.

If Mixed Mode LDAP is applied, the same set of custom fields are used. These are listed with the label Mixed Mode within the Custom Field Category filter list.

List View Options: Knowledge Tab

The List View options are derived from the database fields and can be customized by selecting  within the Knowledge Tab.

The options within the Knowledge Tab are outlined in the following table:

	Description
Age	Based on when the content was created, shows the age of the Article or FAQ.
Article No.	The identifying number for the Article or FAQ.
Classification	Shows the Item Classification assigned to the Article or FAQ.
Created	Displays the date when the Article or FAQ was created.
Custom 1 to 5	Shows the Custom Fields that have been configured in the Admin>Setup>Custom Fields tab for Customer Information.
Item Type	Shows the Item Type assigned to the Article or FAQ.
Last Updated	Displays when the Article or FAQ was last updated.
Mean Rating	Displays the mean score rating for helpfulness of the Article or FAQ.
Owner	The User who created the Article or FAQ.
Status	Details the stage of publication the Article or FAQ is assigned (i.e., In Development, Pending Publication, Published or Archived.)
Summary	Shows the information recorded in the Summary field of the Article, or the Question field of an FAQ.
Title	Displays the Article Title.
Type	Shows the Item Type assigned to the Article or FAQ.
View Date	Displays when the Article or FAQ was last viewed.
Views	Details the number of times the Article or FAQ has been viewed by a Customer.
Visibility	Shows who can access the Article or FAQ in the Knowledge Base.
Votes	Shows the total number of votes recorded against an Article or FAQ.

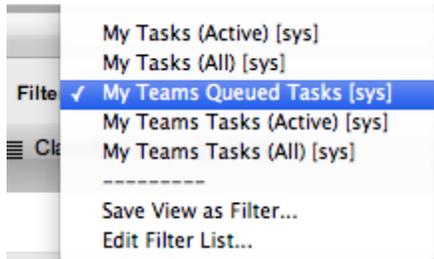
If Custom Fields have been enabled for a Articles in Admin>Setup>Custom Fields, they will also be available in the Views Editor drop-down list options.

1.4.9 List Filters

Data within the system can be searched when the Search button appears at the top of the sub-menu screen, next to the New button. Searches that are conducted on a regular basis can then be saved as a List Filter, for easy reference at a later date.

The system includes at least one system defined List Filter for all screens.

To change a List Filter view, select the relevant option from the drop-down menu next to the Filter option. This selection will persist, which allows you to move to another screen or log out and when you return to that screen, it will render with the previously selected Filter view.



To create a List Filter

1. Click the Search button on the relevant screen
2. Define the search parameters
3. Select Search
The search results will be displayed.
4. Go to the Filter drop-down menu that is visible in the sub-menu bar
5. Select Save View as Filter
6. Enter the Filter Name
7. If the filtered view is to be used by other Users, tick the Shared option
8. Select the Roles or Team that will share the saved search
9. Click Save.

The saved List Filter is saved within the Filter drop down options.

List Views can be edited and deleted by selecting the Edit Filter List option from the pop-up menu in the Filter option. See: [List Views](#).

1.4.10 Changing Roles

If a User is assigned more than one Role in the application, they can switch to another Role after logging into the system that provides the User access to their assigned Default Portal.

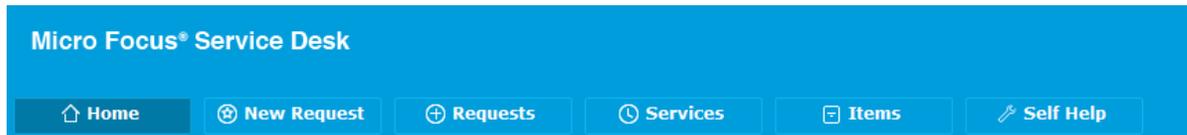
The User Roles of Supervisor or Technician, Finance and Manager are consolidated within one User view. Therefore, if a User is assigned Finance, Manager and Supervisor/Technician access, they can view all functionality related to these Roles within the User view. If the User is also assigned Admin and Customer access, next to their login name, the options of Setup and Customer will be displayed.

A screenshot of a user interface showing role selection options. The text is: '[setup] [Customer] System Supervisor'. The 'System Supervisor' text is in a larger font and appears to be the current role, while '[setup]' and '[Customer]' are in smaller font and appear to be clickable options.

The Administrator can access the administrator functionality within the Setup view. If the Administrator is also assigned User and Customer access, next to their login name, the options of User and Customer will be displayed.

[user] [Customer] System Supervisor

Users or Administrators who are also assigned Customer access can view the Customer Portal through the Customer link displayed in the sub-menu bar. Whilst logged in as the Customer, the options of User and Admin Portal will be displayed within the Customer Portal sidebar Menu.



To move to another User Role portal:

1. Log in using the credentials for the default User Role
2. Click on the Setup/User/Customer link, as required.

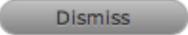
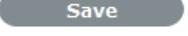
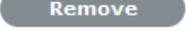
The screen defaults to the selected functionality.

1.4.11 Buttons

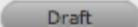
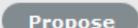
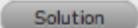
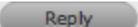
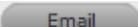
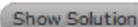
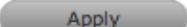
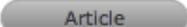
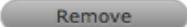
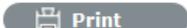
Common Buttons

	Create a new request, Item, Customer, etc.
	Search option provided in List Views across the system.
	Search button within activities across the system.
	Add button allows User to add Customers, etc
	Print screen.
	Closes the pop-up window.
	Create a PDF document from screen information.
	Create an Excel document from screen information.

Common Buttons

	Allows User to subscribe to RSS feeds for information updates.
	Display a received alert. Click to open the Alert information screen.
	Remove an Alert.
	Create a personalized screen list view for all Request Types, Items, Customers and Knowledge tabs.
	Open object in Edit mode.
	Delete object when the screen is in edit mode.
	Rebuilds full text indexes across the application for efficient searching.
	Move an object between list boxes.
	Save changes and move out of the edit mode screen.
	Cancel, not save changes and close screen.
	Close screen and return to the list view.
	Add elements to a list- User skill sets, team memberships, email aliases, SLA Workflows.
	Remove elements from a list- User skill sets, Team memberships, email aliases, SLA Workflows.
	Apply Spell Checker, after selecting from the drop-down list the relevant language.
	Indicates a Customer's request to Chat.
Request Buttons	
	Indicates an Incident.
	Indicates a Problem.
	Indicates a Change Request.
	Indicates a Service Request.
	Indicates a Deployment Task.
	Display the calendar for easy reference.
	Manually escalate or de-escalate a request.

Common Buttons

	Scroll over to display pop-up information regarding the Item or Status Notes.
	Add new information when a screen is in Edit mode (i.e., a new Incident Note).
	Save entry when a screen is in Edit mode.
	Allows the User to save a Note as a draft, which they can continue working on at a later date.
	Send a handshake email and move a request to On Hold Pending state.
	Move a new Note to the Solution tab and convert status to a Pending Approval or Closed Resolved State. For requests with an assigned Solution, a Show Solution button will display the Solution to the User.
	Allows the User to reply to a Note within the Notes Editor screen.
	Email saved Notes and login credentials to a Customer/User.
	Displays Solution Article screen when clicked within the Summary tab of a request that has an assigned Solution.
	In the Analysis tab, assigns a Solution Article to a request.
	In the Analysis tab, converts a Solution associated with a request to a Knowledge Base Solution Article.
	In the Analysis tab, removes the association of a request with an applied Solution.
	Indicates a Note is private and not visible on the Customer Portal. Toggle to make Public.
	Indicates a Note public and visible on the Customer Portal. Toggle to make Private.
	Duplicate creates a copy of the request and links the copy to the original request. The User can then amend the Customer or Item details, if required.
	Opens the request details and history in a print screen.
	Allows the User to create an Alert for the request, which is then visible within the Analysis tab.
	Group requests.
	Removes a request from a group.

Common Buttons



Moves the request to the closed accept state and publishes the new Knowledge Base content.

Revise

Moves the request to the KBA - Rework state and moves the related Knowledge Base content to a In Development state.



Moves the request to the closed rejected state and moves the related Knowledge Base content to a In Development state to allow the author to delete.

Item Buttons

Duplicate

Copy selected Item details when creating a new Item.

Bulk

Allows User to update the ownership status for multiple Items in one transaction.



Add a manufacturer or vendor.

Merge

Information from multiple Snapshots of an Item are to be stored as a single Item record in the CMDB.



Cancel icon upload for use in a Relationship map.



Upload an icon for use in a Relationship map.



Modify a manufacturer or vendor.



Remove an owner from an Item.

Rollback

Revert an Item to a previous state.

Group Buttons

Add

Add the selected request to the Group.

Remove

Remove the selected request from the Group.

Project

Outputs the Change Groups List View in a Projects document format.

Forum Buttons

Forum

Return to the Forums list.



Edit a Forum details.

Topics

Returns User to topics list.



Hides posts from the User or Customer.



Delete a topic post.



Move a topic post.

Common Buttons



Show a Topic post that has been hidden.

Bookmarks

Mark the current topic for quick access as a bookmark.

New

Reply to a Forum topic.

Reports Buttons

Create

Generate a report.

Logging Buttons

Login

Enter login details to access application.

Logout

Close out of the application.

Setup Buttons

Import

Import CSV file of Items, Customers or KBAs.

Test

Test email and authentication server set-up.

Enable

Re-enable a deleted Customer, User or Item.

Sync

Synchronize the system with LDAP /AD server.



Reset password.

Advanced

Open extended database options (i.e. Upgrade, Create and Drop options).

Create

Generate a script to create a new database.

Upgrade

Migrate database.

Test

Tests the connection to the database, based on the details entered.

Drop

Generate a script to delete a database.

Customer Portal Buttons



Remove content in search fields.



Search content in search fields

Resolved

Close the request in the Customer Portal.



Create a new Item through the Customer Portal.

Rate

Evaluate the usefulness of an Article.

Common Buttons

	Save a request Note.
	Cancel a request Note.
	Collapse the request View.
	Displays the contents of all Notes.
	Closes the expanded Notes read-only view.
	Add a new Note or upload an Attachment.

1.4.12 Online Help

To assist Users when using the system, online help is available throughout the application.

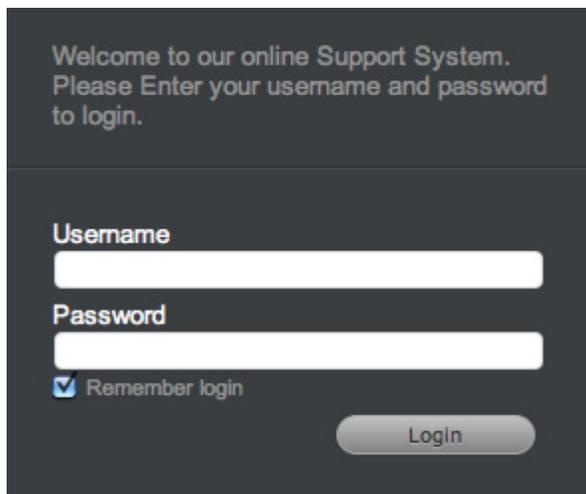
To access information relevant to an opened screen, click the Help button located in the top right corner of the screen, next to the Logout button.



A Help Page is displayed containing information related to the application page that is open. Navigate through the help information as necessary, or click Show to view the entire User Guide.

1.4.13 Remember Login

The Remember login option on the Login Page allows the User to save their login details for when they next access the system. By saving login details, the User can instantly access their Home Page without repeating the login process, if they exit the system without using the Logout button. It should be noted that after 30 days, the User will be prompted to re-enter their login credentials.



To use Remember login functionality:

1. Enter User Name and Password.

2. Tick the Remember Login box.
3. Click Login.

If the User ends a session without using the Logout button, they will gain immediate access to the application when they return to the URL. To prevent the immediate login, end the session using the Logout button.

1.4.14 Working on requests

When a request is created a Customer and Item, be that an actual object or service, are associated with the request. The Customer's concern or query is classified based on a list derived from the Category and Type of the Item assigned to the request. Then based on the system configuration, the request is assigned to a Technician in a Team associated with the SLA and Workflow assigned to the request.

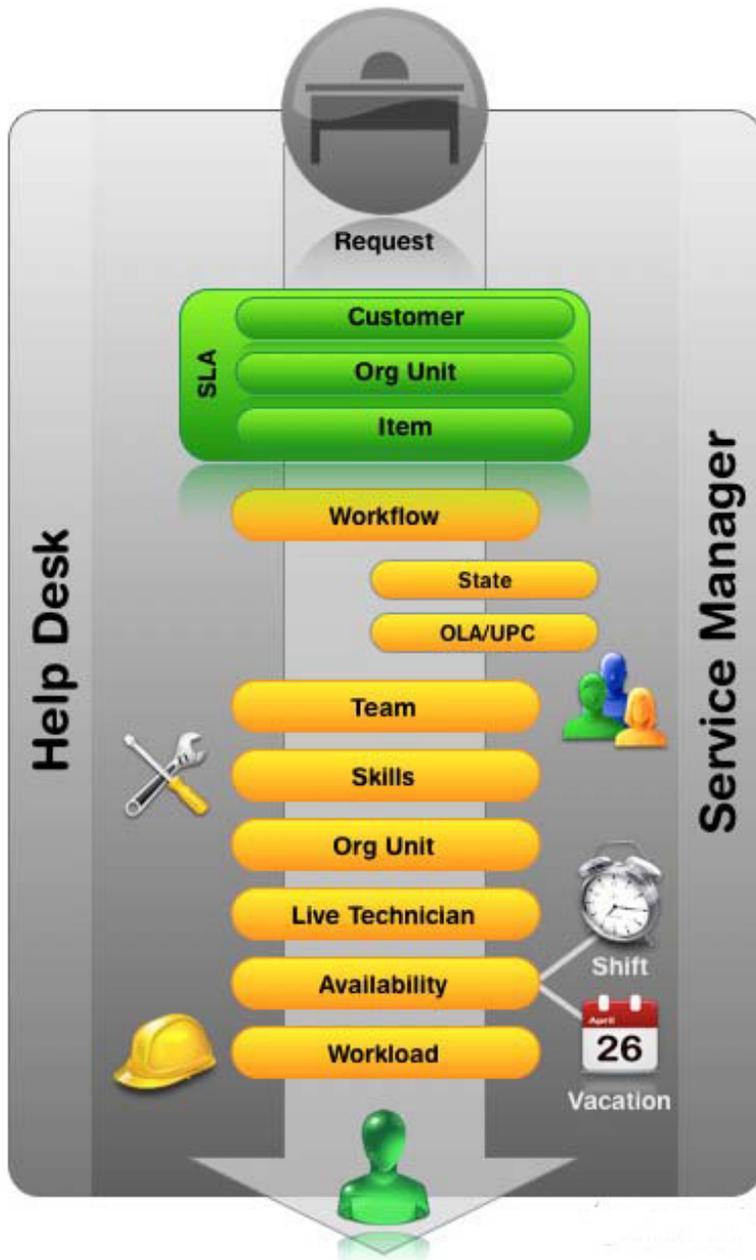


Figure 1: Request assignment logic

After the Team has been assigned to the request, the application goes through the following steps:

1. Checks if the Team has escalation layers and validates the capability of Technicians in Layer One
2. To make an assignment within the layer, the system checks if Technicians are assigned areas of specialty - Skills or Classifications. If so, the system matches the Classification of the Incident with the Classifications supported by the Technician
3. If multiple Technicians are assigned the relevant Classification, or if specific Classifications are not assigned to the Technicians within the Team, then the system verifies if Team members have been assigned to support specific Organizational Units. If so, the application will match the Organizational Unit of the Customer to the Technician
4. If the Team Live Priority feature has been enabled, the system checks for Team Technicians logged into the application. If multiple matches have been made between the Technician Skills and the Incident's Classification, and the Org Unit of the Customer and Technician, the system checks for technicians logged into the application. However, if no match is made between the Skills and Organizational Unit, it will still check for the logged in User if the Live Priority Team functionality is active
5. If there are multiple valid Technicians based on Skill, Org Unit and/or Logged In User, the application will allocate the request to a Technician with the lightest request load.

To work on a newly created or existing request, within the Summary tab you can:

- ◆ Review a [Request](#) or [Incident](#) and associated Item details
- ◆ [Add a Note](#)
- ◆ Move a [Request](#) or [Incident](#) from open to closed, and any State in between
- ◆ Escalate a Request or Incident
- ◆ [View request activity](#)
- ◆ [Manage requests as a group](#).

To access a complete summary of Notes in one screen, along with the associated request details

select  **Print** .

1.5 User Roles

- ◆ [Section 1.5.1, "Default Portal," on page 121](#)
- ◆ [Section 1.5.2, "User Processes," on page 122](#)
- ◆ [Section 1.5.3, "User Roles & Privileges," on page 122](#)
- ◆ [Section 1.5.4, "Administrator Role," on page 130](#)
- ◆ [Section 1.5.5, "Supervisor Role," on page 130](#)
- ◆ [Section 1.5.6, "Technician Role," on page 131](#)
- ◆ [Section 1.5.7, "Partner Role," on page 131](#)
- ◆ [Section 1.5.8, "Manager Role," on page 132](#)
- ◆ [Section 1.5.9, "Finance Role," on page 132](#)
- ◆ [Section 1.5.10, "Customer Role," on page 133](#)

There are seven access levels in the system that determine the functionality and privileges. These include the Administrator and Customer Roles, plus five User Roles:

- ◆ Supervisor
- ◆ Technician
- ◆ Partner
- ◆ Manager
- ◆ Finance.

A Default Role is assigned if multiple Roles are allocated to an individual.

A User can have more than one Role but only one of the licensed Roles of:

- ◆ Supervisor
- ◆ Partner
- ◆ Technician.

1.5.1 Default Portal

Individuals can be allocated more than one Role. For Users assigned more than one Role, define a Default Portal within their Information screen. When they log into the system, the Default Portal is displayed and they can move to other Portals using the links provided next to their login name.

The Default Portal options include Customer, Setup for system Administrators and User, for those assigned a Supervisor/Technician/Partner, Finance and Manager Role(s).

When a person has multiple Roles, the Default Role is used to log into the system and the privileges of multiple User Roles are consolidated in one view. For example, if a User is assigned Finance, Manager and Supervisor/Technician access, they can view all functionality related to these Roles within the User view.

When the User is also assigned Admin and Customer access, next to their login name, the options of Setup and Customer will be displayed.



[setup] [Customer] System Supervisor

The Administrator can access the admin functionality within the Setup view. If the Administrator is also assigned User and Customer access, next to their login name, the options of Setup and Customer will be displayed.



[user] [Customer] System Supervisor

Users or Administrators who are also assigned Customer access can view the Customer Portal through the Customer link displayed in the sub-menu bar. Whilst logged in as the Customer, the options of User and Admin Portal will be displayed within the Customer Portal sidebar Menu.



To move to another User Role portal:

1. Log in using the credentials for the default User Role
2. Click on the Setup/User/Customer link, as required.

The screen defaults to the selected functionality.

1.5.2 User Processes

The service management application includes processes to manage the different types of requests:

- ◆ Service Requests
- ◆ Incidents
- ◆ Problems
- ◆ Change Requests
- ◆ Release and Deployment
- ◆ Service Level Management.

◆ **NOTE:** Service Requests, Problem, Change, Release and Deployment Management apply based on installed license.

When User accounts are created, access to Incident, Problem, Change, Release, Deployment, Request, Service Level, Configuration and Knowledge Management processes are allocated to the Roles. Allocating processes gives the User access to requests and information within each assigned process.

Providing access to the licensed processes of Incident, Problem, Change and Service Requests means the User can be assigned as a member of support Teams within that process.

Setting access to the support process of Service Level Management displays the Service Tab for the User when they log into the application. This allows the User to create and edit SLAs, OLAs and Underpinning Contracts.

When the privileges of Configuration and Knowledge are selected, the options to define control at a more granular level are displayed in the User Information screen, and Users can be assigned permission to create, edit, delete and publish elements within these processes.

The following User Roles have limitations for the processes they are assigned:

- ◆ The Finance Role can only be assigned Configuration and Service Level Management
- ◆ The Management Role can be allocated all processes but with 'Read Only' access.

1.5.3 User Roles & Privileges

Service Manager 7.0 User Roles and Privileges

Modules & Features	Administrator	Supervisor	Technician	Partner	Finance	Manager	Customer
Setup							
Email Setup and email customization	Yes						
Create Custom Fields	Yes						

Service Manager
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Set User, Customer & System Privileges	Yes						
UI customization	Yes						
Dynamic database switching	Yes						
Schedule LDAP/ ADS Integration	Yes						
Item import via AMIE or .CSV file	Yes						
Customer Import	Yes						
Scheduled Reports	Yes						
Incident Analyzer for Problem Management	Yes						
Enable Billing module	Yes						
Customize Workflows		Yes					
Customize System Messages and Keywords	Yes						
Chat		Yes	Yes	Yes			Yes
Context Sensitive Help	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Create Users	Yes	Yes					
Assign User Roles & Processes	Yes	Yes					
Create Teams, Escalation layers & Workgroups		Yes					
Create Customers	Yes	Yes	Setup	Setup	Setup	Setup	
Enable Customer access	Yes	Yes	Yes	Yes	Yes	Yes	
View/ Edit Customer	Yes	Yes	Yes	Yes	Yes	Yes	

**Service Manager
7.0 User Roles
and Privileges**

Search Customers	Yes	Yes	Yes	Yes	Yes	Yes
Re-enable deleted Users & Customers	Yes					
Create Organizational Units		Yes	Yes	Yes	Yes	Yes
Assign Contracts to Cust Org. Units	Yes	Yes	Yes	Yes	Yes	Yes
Incident Management						
Create/Edit Incidents		Yes	Yes	Yes		
Delete Incidents		Yes				
View/ Edit other Technicians' Incidents		Yes	Setup			
Re-assign Incidents		Yes	Setup	Setup		
Escalate Incidents		Yes	Setup	Setup		
View all Incidents		Yes	Setup			
Handshaking		Yes	Yes	Yes		
Incident Groups		Yes	Yes	Yes		Yes
Impact analysis		Yes	Yes	Yes		Yes
View Proposed Solutions		Yes	Yes	Yes		
Incident analysis		Yes	Yes	Yes		
Subscribe to RSS feeds		Yes	Yes	Yes		
Request Fulfilment						
Create/Edit Service Requests		Yes	Yes	Yes		
Delete Service Requests		Yes				
View/ Edit other Technicians' Service Requests		Yes	Setup	Setup		

**Service Manager
7.0 User Roles
and Privileges**

View all & re-assign Service Request	Yes	Setup	Setup		
Approve Service Request				Yes	Yes
Escalate Service Request status	Yes	Yes	Yes	Yes	
Handshaking	Yes	Yes	Yes		
View Proposed Solutions	Yes	Yes	Yes		
Service Request Groups	Yes	Yes	Yes	Yes	
Impact analysis	Yes	Yes	Yes	Yes	
Update Workflow State	Yes	Yes	Yes		
Problem Management					
Create/Edit Problems	Yes	Yes	Yes		
Delete Problems	Yes				
View/ Edit other Technicians' Problems	Yes	Setup			
Re-assign Problems	Yes	Setup	Setup		
Escalate Problems	Yes	Setup	Setup		
View all Problems	Yes	Setup			
Create Known Errors	Yes	Yes	Yes	Yes	
Impact analysis	Yes	Yes	Yes	Yes	
View Proposed Solutions & Workarounds	Yes	Yes	Yes		
Problem analysis	Yes	Yes	Yes		
Create Workarounds	Yes	Yes	Yes		
Change Management					

**Service Manager
7.0 User Roles
and Privileges**

Create/Edit Change Requests	Yes	Yes	Yes		
Delete Change Requests	Yes				
View/ Edit other Technicians' Change Requests	Yes	Setup	Setup		
View all & re-assign Change Request	Yes	Setup	Setup		
Escalate Change Request/Change CR status	Yes	Yes	Yes	Yes	
Approve Change Request				Yes	Yes
Change Groups	Yes	Yes	Yes	Yes	
Impact analysis	Yes	Yes	Yes	Yes	
Create Back Out procedure	Yes	Yes	Yes		
Update Workflow State	Yes	Yes	Yes		
Release & Deployment					
Create/Delete Tasks	Yes				
Edit Tasks	Yes	Yes	Yes		
View/ Edit other Technicians' Tasks	Yes	Setup	Setup		
View all & Re-assign Tasks	Yes	Setup	Setup		
Define a Release	Yes			Yes	
Define a Deployment Package	Yes			Yes	
Control Release Lifecycle	Yes			Yes	
Create and Modify Workflow	Yes				

**Service Manager
7.0 User Roles
and Privileges**

Service Asset &
Configuration,
Service Portfolio
& Service Catalog
Management

Create/Edit/ Delete Items	Yes	Setup	Setup	Setup	Setup	Setup
------------------------------	-----	-------	-------	-------	-------	-------

View/Edit Items	Yes	Yes	Yes	Yes	Yes	
-----------------	-----	-----	-----	-----	-----	--

Search Items	Yes	Yes	Yes	Yes	Yes	Yes
--------------	-----	-----	-----	-----	-----	-----

Re-enable deleted Items	Yes					
----------------------------	-----	--	--	--	--	--

Create Item Categories, Types & Classifications	Yes					
---	-----	--	--	--	--	--

Create Outages	Yes	Setup		Yes	Yes	
----------------	-----	-------	--	-----	-----	--

View Outages	Yes	Yes	Yes	Yes	Yes	Yes
--------------	-----	-----	-----	-----	-----	-----

Assign Contracts	Yes	Yes	Yes	Yes	Yes	
------------------	-----	-----	-----	-----	-----	--

Service Level
Management

Define SLAs	Yes	Yes		Yes	Yes	
-------------	-----	-----	--	-----	-----	--

Define Underpinning Contracts	Yes	Yes		Yes	Yes	
-------------------------------------	-----	-----	--	-----	-----	--

Define OLAs	Yes	Yes		Yes	Yes	
-------------	-----	-----	--	-----	-----	--

Create Vendors	Yes	Yes		Yes	Yes	
----------------	-----	-----	--	-----	-----	--

Create SLA Breach Codes	Yes					
----------------------------	-----	--	--	--	--	--

View SLA breaches	Yes	Yes		Yes	Yes	
----------------------	-----	-----	--	-----	-----	--

Financial
Management

Create Purchase Orders				Yes		
---------------------------	--	--	--	-----	--	--

Process Purchase Orders				Yes		
----------------------------	--	--	--	-----	--	--

Create and Assign Contracts				Yes		
--------------------------------	--	--	--	-----	--	--

Process Contracts				Yes		
----------------------	--	--	--	-----	--	--

**Service Manager
7.0 User Roles
and Privileges**

Create and Process Invoices						Yes	
Create, Manage & View Item Costs						Yes	
Forecast Service Item Costs						Yes	
Knowledge Management							
Create Articles/ FAQs	Setup	Setup	Setup			Setup	
Publish Articles	Setup	Setup	Setup			Setup	
Create Article Groups	Yes	Setup	Setup				
Search Articles	Yes	Yes	Yes			Yes	Yes
Administer Forums	Setup	Setup	Setup				
Create/Modify/ Reply to topic threads	Setup	Setup	Setup				Setup
Create Surveys	Setup	Setup	Setup			Setup	
Complete Surveys	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Reports							
KPI Reports	Yes	Yes				Yes	
Incident Reports	Yes	Yes				Yes	
Problem Reports	Yes	Yes				Yes	
Change Request Reports	Yes	Yes				Yes	
Configuration Reports	Yes				Yes	Yes	
Service Agreement Reports	Yes				Yes	Yes	
Contract Reports	Yes				Yes	Yes	
Organization Reports	Yes				Yes	Yes	
Technician Reports	Yes					Yes	

**Service Manager
7.0 User Roles
and Privileges**

Knowledge Reports		Yes	Yes				Yes	
Finance Reports		Yes				Yes	Yes	
Login Reports	Yes	Yes					Yes	
System Reports	Yes	Yes						
Build Reports		Yes				Yes	Yes	
Custom Reports		Yes					Yes	
Home								
Create Alerts	Yes	Yes	Setup					
View Alerts	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Enable Quick Calls	Yes							
Create Quick Call Templates		Yes						
Set User Preferences	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Disable receiving personal email	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
Dashboard across Processes		Yes	Yes	Yes			Yes	
Customer Portal								
Create/View/Edit requests								Yes
Edit & close existing requests								Setup
View Proposed Solutions								Yes
Search Knowledge Base								Yes
View FAQ's								Yes
View Service Catalog								Setup
Create Items								Setup
View Outages								Yes
Chat Technician regarding request								Setup
Search Forums								Setup

**Service Manager
7.0 User Roles
and Privileges**

Complete Surveys	Yes
Subscribe to RSS feeds	Yes

1.5.4 Administrator Role

The Administrator Role performs System Configuration and Setup tasks including:

- ◆ Customizing the application and automated messages
- ◆ Configuring the interaction between external systems, including the authentication servers and asset management tools
- ◆ Enabling Customer, User, Request and System Privileges
- ◆ For systems with Problem Management, set parameters for automatic Problem identification and creation.

NOTE: Multiple Administrator Roles can be created within the system

It is recommended that organizations create only one or, at maximum, two Administrators. Only an existing Administrator can create other Administrator accounts.

If a User is assigned multiple Roles, the privileges are consolidated within a single User view. See: [Changing Roles](#).

1.5.5 Supervisor Role

The Supervisor Role provides maximum access to the system for day-to-day management of the service desk and configuration control.

Supervisor Users can:

- ◆ Create User and Customer accounts
- ◆ Assign Roles & Processes
- ◆ Build workflows
- ◆ Configure the CMDB
- ◆ Allocate Technicians to Teams and Escalation Layers
- ◆ Define Service and Operational Level Agreements (SLAs and OLAs) for the organization.

The Configuration Management Database (CMDB) is the central data repository for the support tool. The CMDB allows centralized management of IT infrastructure through Configuration Items (Items). Within the application, everything is tied to Items in the CMDB. Supervisors control the configuration of the CMDB, which includes:

- ◆ Item Categories
- ◆ Lifecycle Templates
- ◆ Item Types

- ♦ Classifications
- ♦ Configuration Items.

NOTE: The ability to create Items can also be assigned to other Roles, if the Administrator has enabled the option

If a User is assigned multiple Roles, the privileges are consolidated within a single User view. See: [Changing Roles](#).

1.5.6 Technician Role

The Technician Role is assigned to service desk staff who work on requests.

Technicians are allocated support Processes and can then be assigned to Teams and Escalation Layers. Technicians can belong to any number of Teams within Processes.

When enabled by the Administrator, Technicians can:

- ♦ Create new Customers
- ♦ Create new Items
- ♦ Reassign requests
- ♦ Edit other Technicians' requests
- ♦ Create Alerts
- ♦ Create, edit, publish and delete Knowledge Base Articles by default.

NOTE: Every Technician must be assigned to a Supervisor

If a User is assigned multiple Roles, the privileges are consolidated within a single User view. See: [Changing Roles](#).

1.5.7 Partner Role

A Partner User is assigned to a Partner Organization and has the same privileges as a Technician User, but can only view and support Customers associated with their assigned Partner Organization.

A Partner Role gives a User the ability to:

- ♦ Manage their Customers
- ♦ Manage their Customers' requests
- ♦ Create and maintain their Customers' Items
- ♦ View reports.

Users who are assigned the Partner Role must be associated with a Partner Organization, and this is done manually within the User Information screen or within the Partner Organization > Technician tab. Partner Organizations are used in the management of requests between Customers/ Organizational Units and external service providers within the support system. It allows multiple Partner Users to be available within a Team, and assigned at relevant levels of escalations for working on requests.

If a Partner User is created and not associated with a Partner Organization, they cannot be assigned to a Team and therefore cannot be assigned to work on requests.

When a request is created for a Partner Organization's Customer it is automatically allocated to the Partner User within the Partner Organization.

1.5.8 Manager Role

The Manager Role is a User who can oversee the activities of the service desk or specific Processes. Managers have access to most parts of the system, primarily on a *read-only* basis.

The Manager access can be provided to Users who do not actively participate in the day-to-day happenings of service and support Teams, but may require detailed information about the actions and status of requests.

As a Manager, the User can:

- ◆ Create Customers
- ◆ View requests within their allocated Processes
- ◆ Access the full range of reports
- ◆ Create and modify Items
- ◆ Approve Service and Change Requests. (Based on licenses for Service Manager product.)

Users who manage the service desk and are to be included in Teams with edit access to requests, should be allocated a Supervisor Role.

NOTE: If a User is assigned multiple User Roles, the privileges are consolidated within a single User view. See: [Changing Roles](#).

1.5.9 Finance Role

Users with the Finance Role are assigned Service Level Management and Configuration Management by default. Their Role is primarily for driving the service costing models and, if relevant, maintaining the Billing module that uses system Contracts and Purchase Orders.

A Finance User can:

- ◆ Create Customers and Items
- ◆ Project end to end Service costs
- ◆ Complete access to SLA's and OLA's
- ◆ Access reports
- ◆ Bill for services
- ◆ Process payment for Invoices
- ◆ Cancel Maintenance Contracts
- ◆ Manage IT and Service Assets.

NOTE: A User assigned the Finance Role is the only User with the privilege to process the payment of Invoices

This is relevant for systems that have the Invoice option enabled in the Billing Setup.

If a User is assigned the Supervisor and Finance Role, the privileges are consolidated within a single User view. See: [Changing Roles](#).

1.5.10 Customer Role

The Customer Role is for users who submit Service Requests, Incidents and possibly Change Requests to the service desk.

Within the system, based on the system configuration, Customers can:

- ♦ Create and manage requests via email
- ♦ Create, view or edit their requests through the Customer Portal
- ♦ Self-diagnose issues using the Knowledge Base
- ♦ Access proposed Solutions during the request creation process
- ♦ Participate in a live chat with Technicians to discuss their issues
- ♦ Subscribe to RSS feeds for the latest information on their requests
- ♦ Access the Knowledge Base, Forums and FAQs
- ♦ Customers have access to their Items' Outages information
- ♦ View all Services offered by the Service Organization, if enabled for the system
- ♦ Approve Service and Change Requests. (Based on licenses for Service Manager product.)

2 Supervisor Guide

- ◆ Section 2.1, “Supervisor View,” on page 135
- ◆ Section 2.2, “ITIL,” on page 136
- ◆ Section 2.3, “Home,” on page 137
- ◆ Section 2.4, “Operations,” on page 167
- ◆ Section 2.5, “Change,” on page 409
- ◆ Section 2.6, “Configuration,” on page 521
- ◆ Section 2.7, “Service,” on page 613
- ◆ Section 2.8, “User,” on page 691
- ◆ Section 2.9, “Knowledge,” on page 762
- ◆ Section 2.10, “Reports,” on page 815
- ◆ Section 2.11, “Finance,” on page 848

2.1 Supervisor View



The Supervisor Role provides maximum access to the system and includes the capability to configure the structure of the Configuration Management Database (CMDB), Workflows, Service Level Agreements, Teams, Customer and User details.

The Supervisor view has the following tabs to populate and use the system:

- ◆ [Home](#) - Provides the User with a list of their active requests, dashboard reports and survey responses. Allows the User to create Alerts and Quick Call templates, and edit their account details.
- ◆ [Operations](#) - Allows the User to view, create and edit all [Service Requests](#), [Incidents](#) and [Problems](#).
- ◆ [Change](#) - Allows the User to view, create and edit all Change Requests, and if relevant Release and Deployment tasks.
- ◆ [Configuration](#) - Allows the User to configure the CMDB including the setup of Item Categories, Item Types and Configuration Items.
- ◆ [Service](#) - Allows the User to define Service Level Agreements, create Operation Level Agreements and Underpinning Contracts and view all Maintenance Contracts.
- ◆ [User](#) - Enables the User to create other User accounts, Customer accounts, Organizational Units, Partner Organizations and define support Teams.
- ◆ [Knowledge](#) - Allows the User to view, create and edit Knowledge Base Articles, FAQ's, and Article groups. Users can also create and manage [Surveys](#) and [Forums](#) within this tab, if enabled within their account information screen.
- ◆ [Reports](#) - Provides the User access to all Reports generated by the system.
- ◆ [Finance](#) - Allows the User to view, edit and create Invoices and Purchase Orders (if enabled).

NOTE: If a Supervisor User is also assigned Finance and/or Manager privileges, the functionality of all Roles is accessible through the Supervisor User view.

2.2 ITIL

The objective of ITIL Service Management is to provide IT services to business customers that are fit for purpose, stable and reliable to the point of a business trusting them as a utility. This is achieved by encouraging service providers to adapt a common framework of practices across all areas of IT with the single aim of delivering value to the business.

An ITIL approach to service management protects an organization's IT investment. It ensures organizations baseline services and build capabilities to learn in one area of the organization while providing improvements elsewhere. ITIL delivers service management functionality with sound structure, stability and strength that is built on principles, methods and tools.

The essence of ITIL core practice is captured by the Service Lifecycle that demonstrates an iterative and multidimensional approach to providing services. The phases of the Service Lifecycle include:

- ♦ *Service Strategy*: sets the objectives and performance expectations for IT Services and IT Service Management in line with the organizational needs.
- ♦ *Service Design*: focuses on designing new or changed services for introduction into the production environment.
- ♦ *Service Transition*: plans and manages the capacity and resources needed to package, build, test and deploy a release into production, while establishing the service within the customer and stakeholder requirements.
- ♦ *Service Operations*: coordinates and conducts activities and processes needed to deliver and support services at agreed levels to business users and customers.
- ♦ *Continual Service Improvement*: constantly aligns and realigns IT service to the evolving business requirements by identifying and implementing to the IT services that underpin the business processes.

Our service management application offers the following capabilities:

- ♦ [Financial Management](#) (Service Strategy)
- ♦ [Service Portfolio](#) (Service Strategy)
- ♦ [Service Catalog](#) (Service Design)
- ♦ [Service Level Management](#) (Service Design)
- ♦ [Change Management](#) (Service Transition)
- ♦ [Service Asset & Configuration Management](#) (Service Transition)
- ♦ [Release & Deployment](#) (Service Transition)
- ♦ [Knowledge Management](#) (Service Transition)
- ♦ [Incident Management](#) (Service Operation)
- ♦ [Problem Management](#) (Service Operation)
- ♦ [Request Fulfillment](#) (Service Operation)

2.3 Home

- ◆ [Section 2.3.1, “My Tasks,” on page 138](#)
- ◆ [Section 2.3.2, “Searching for an Item,” on page 140](#)
- ◆ [Section 2.3.3, “Dashboard,” on page 144](#)
- ◆ [Section 2.3.4, “Alerts,” on page 147](#)
- ◆ [Section 2.3.5, “Chat,” on page 152](#)
- ◆ [Section 2.3.6, “Calendar,” on page 154](#)
- ◆ [Section 2.3.7, “My Account,” on page 154](#)
- ◆ [Section 2.3.8, “Quick Calls,” on page 157](#)
- ◆ [Section 2.3.9, “Group Templates,” on page 163](#)
- ◆ [Section 2.3.10, “Feedback,” on page 166](#)



When a User logs into the application, the system defaults to the Home tab. This allows the User to instantly access requests that have been allocated to them and their Teams, which are currently active. Alternatively to default to the Dashboard, a User can update the Default Home option in their My Account screen.

As a Supervisor, Alerts and Quick Call templates can be created for system-wide use within the Home tab. Personal Account information can be accessed and modified in the My Account screen. Service metrics can be displayed graphically within the fully configurable Dashboard tab.

The Home tab gives access to the following tabs:

- ◆ [My Tasks](#) - Provides the User with a list of their active requests and their Team's active request. Queued requests, if enabled, are also available in the Home tab.
- ◆ [Dashboard](#) - The Dashboard can be configured to provide the User with the real time service desk data
- ◆ [Alerts](#) - Allows the User to view, create or edit alerts
- ◆ [Chat](#) - Allows the User to view and accept Customer's chat requests (when enabled in the system Setup)
- ◆ [Calendar](#) - Displays an event calendar for User's requests and due dates, along with Resource and Outages calendars
- ◆ [My Account](#) - Allows the User to edit their personal information including email preferences, password resets, if enabled, and set their time zone
- ◆ [Quick Calls](#) - Allows the User to create Quick Call templates, for all Users of the application
- ◆ [Group Templates](#) - Allows the User to define Group Templates used when creating Request, Incident and Change groups
- ◆ [Feedback](#) - Allows the User to access published Surveys that are ready for completion.

2.3.1 My Tasks

- ◆ “Creating a new request” on page 138

My Tasks displays current active requests allocated to the logged in User. They can also view a list of active or all tasks assigned to the Team(s) the User is associated with, by selecting the relevant My Teams Tasks Filter. If the Queue option is enabled for the User's Teams, My Teams Queued Tasks is also accessible in the Filter drop down list.

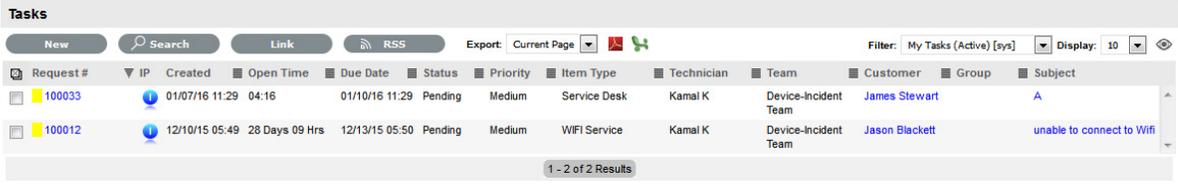
The [List View](#) can also be customized by clicking .

From this screen requests can be:

- ◆ Created
- ◆ Searched
- ◆ Grouped
- ◆ Exported to PDF or Excel
- ◆ Subscribed to for updates via RSS feeds.

If the User is a member of a Service Request, Change, Deployment, Problem or Incident Team, the list will contain all active requests assigned to them for each Process.

To view a request details, select the Reference # hyperlink.



The screenshot shows a web interface titled "Tasks". At the top, there are buttons for "New", "Search", "Link", and "RSS", along with an "Export" button and a "Current Page" dropdown. A filter is set to "My Tasks (Active) [sys]" and the display is set to "10". Below this is a table with columns: Request #, IP, Created, Open Time, Due Date, Status, Priority, Item Type, Technician, Team, Customer, Group, and Subject. Two rows of data are visible:

Request #	IP	Created	Open Time	Due Date	Status	Priority	Item Type	Technician	Team	Customer	Group	Subject
100033		01/07/16 11:29	04:16	01/10/16 11:29	Pending	Medium	Service Desk	Kamal K	Device-Incident Team	James Stewart		A
100012		12/10/15 05:49	28 Days 09 Hrs	12/13/15 05:50	Pending	Medium	WiFi Service	Kamal K	Device-Incident Team	Jason Blackett		unable to connect to Wifi

At the bottom of the table, it says "1 - 2 of 2 Results".

Creating a new request

To create a new request:

1. Select Home>My Tasks
The Tasks screen appears.
2. Click New
The Request Information screen appears.

Request Information

Customer Details

Find Customer

First Name: Email:

Last Name: Phone:

Username: Org. Unit:

Supported Org. Units Only

Name	Phone	Org Unit
Andy Fair		Micro Focus - Head Office
Anil K		Micro Focus - Accounts Dept
Cust1 Cust		
First Last		Micro Focus
Guruprasad S		Micro Focus - Electrical Engg
James Stewart		Micro Focus - Information Technology
Jason Blackett		Micro Focus - Information Technology
Jeff Lag		Micro Focus - Head Office
Michael Angelo		Micro Focus - SMG
Paul Pedron		Micro Focus - Head Office

1 - 10 of 14 Results

Cancel

3. Search and select a Customer
See: Searching for Customers or [Creating a New Customer](#).
4. Search and select an Item
See: [Searching for an Item](#).
5. Select the Service Type, Classification and enter in the task Description
Selecting the Service Type defines the task as an Incident, Problem, Change or Service Request.
6. Click Save.

NOTE: Refer to the specific Process section of the User Guide, for more detailed information about working with the newly created task.

Request Search Tips:

Search results displayed within the Home tab include requests associated with the logged in User or their associated Teams. To access a search results list across all Users in the system, perform the search within the relevant Process tab.

- ◆ The request search option has a default Status to search only Active Requests. To ensure search success, select the relevant Incident Status, if unsure, select All
- ◆ To search across multiple Processes, leave the Type field blank
- ◆ To search for multiple requests numbers at once, insert a comma separator between ID numbers
- ◆ To search based on a request Status, select the request Workflow option from the Workflow drop-down list. Once selected, a list of States is displayed
- ◆ To search by Classification, select an Item Category from the Category drop-down list. After the Category is chosen, a list of Classifications is displayed

- ◆ To search based on the content of a request Description, select the Full Text option within the Search and enter a relevant term (See: [Full text searches.](#))
- ◆ To search using an Item's Custom field information, select the Item Category to display any Custom Fields enabled for that Item.

NOTE: For information regarding request assignment, reviewing a request, adding notes or updating the status, refer to [Working on a Request.](#)

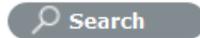
2.3.2 Searching for an Item

- ◆ [“Tips on searching for an Item:” on page 142](#)
- ◆ [“Full Text Search Options” on page 143](#)

To search for Items in the CMDB use the Search button on the Configuration>Items screen.

To search for an Item:

1. Click



A search page is displayed with the options to search across the Team, Item Status, Manufacturers, Global Items, Item Ownership, Item Categories and Types. There is also the option for the search results to return deleted Item information.

Search Items

Global Options
 Attributes
 Full Text

Item No.

Team

Description

Notes

Manufacturer

Search Globals

Deleted Items Only

Owner Options

First Name

Last Name

User Name

Org. Unit

Purchase Order Option

Purchase Order No

Type Options

Item Category

Item Type

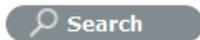
Status
 All
 Active
 Inactive

Cancel
Clear
Search

2. Define any Item Attributes

To complete a Full Text search select that option and then enter relevant text in the Term field. (See: [Full text searches.](#))

3. Click



A list of Items will be displayed.

For an advanced search on specific Item details, it is necessary to enter the Item Category. When this is selected the Item search page will expand:

Search Items

Global Options Attributes Full Text

Item No.

Team

Description

Notes

Manufacturer

Search Globals All

Deleted Items Only

Owner Options

First Name

Last Name

User Name

Org. Unit

Purchase Order Option

Purchase Order No

Type Options

Item Category Hardware

Item Type

Status All
 Active
 Inactive
 Selected

CPU

RAM

MAC Address

Network Address

Network Name

Platform Macintosh
Unix
Windows

OS Version Free BSD
MacOS 9.x
MacOS X.0
MacOS X.1

Version

Licenses

Serial Number

Platform String

Cancel
Clear
Search

Tips on searching for an Item:

- ◆ Select the Deleted Items Only option to return a list of all Items that have been deleted in the system. To re-enable these deleted Items, once the search is executed, select the Item ID# followed by

Enable

- ◆ To search on an Item's Status, first select the Item Category
- ◆ To search on attribute fields of an Item, first select the Item Category
- ◆ To return a list of Items that are allocated to Customers or Org Units, select the Assigned Only option from the Search Globals drop-down list.

Full Text Search Options

A variety of search options, including the ability to search using terms or phrases, can be used to find information in the Knowledge Base or using any full text search fields included in system search screens. Search options include:

- ♦ A single character wildcard search using the ? symbol
- ♦ A multiple character wildcard search using the * symbol
- ♦ A fuzzy search using the tilde, ~, symbol at the end of a single word. For example, to find words similar to roam, enter roam~ and this will return terms like foam and roams.

When searching using a phrase, the group of words need to be entered in the Text field within double quotation marks, for example, "user account access". Complex searches can be conducted using a combination of phrases or terms with boolean operators and all search results are relative to the Team assignment of the User or Item ownership for a Customer.

The boolean operators (i.e., AND, NOT, OR, +) must be entered as uppercase letters. For example:

- ♦ "user" OR "account" returns results related to either word
- ♦ "user" AND "account" returns results with both words
- ♦ "user" NOT "account" returns results including "user" but not "account"
- ♦ +user account returns results that must contain "user" and may contain "account"
- ♦ "user" -"account" returns results that contain "user" but not "account". (Same results as using NOT.)

To further control the boolean logic, more complex searches can be conducted. For example, to search for either "user" or "account" and "access", the search words would be entered as: (user OR account) AND access. This will return results where "access" must be included, while either term of "user" or "account" is found.

Fuzzy logic searches using the '~' (tilde) can be performed on a single word term with the '~' at the end of the word. A value between 0 to 1 can also be applied to the search, where the value closer to 1 ensures terms with higher similarity are matched. If a value is not defined, the default of 0.5 is applied to the search. For example, roam~ should return results with similar spelling, like foam and roams. The search term of roam~0.8 might return words like roams, roamed.

Wildcards can be used to replace single character '?' and multiple characters '*' in search terms. For example, te?t, test* or te*t. Wildcards can not be used as the first character of a search.

Proximity searches can be used to find words in a phrase within a specific distance away from the entered search term. To conduct a proximity search use "~" at the end of the phrase. For example, "user account"~10 will search for results where the word user and account are within 10 words of each other.

Escape character searches are also supported in the system and include: + - & || ! () { } [] ^ " ~ * ? : \

An example of using escape characters when searching for (1+1):2, requires the search syntax of \ (1\+1\) :2 to be entered. It should be noted that the '\' must be entered before the escape characters.

Field Searches

Within the system full text searches can be conducted on specific fields, these include:

Search Screen	Fields
Request	Subject, description, notes, attachments and solution.
Item	Number, itemtype, category, attachments and notes.
Knowledge Base	Title, summary, body, attachments, itemtype, classification, and custom1-5.
Forum	Title, content and author (last name).

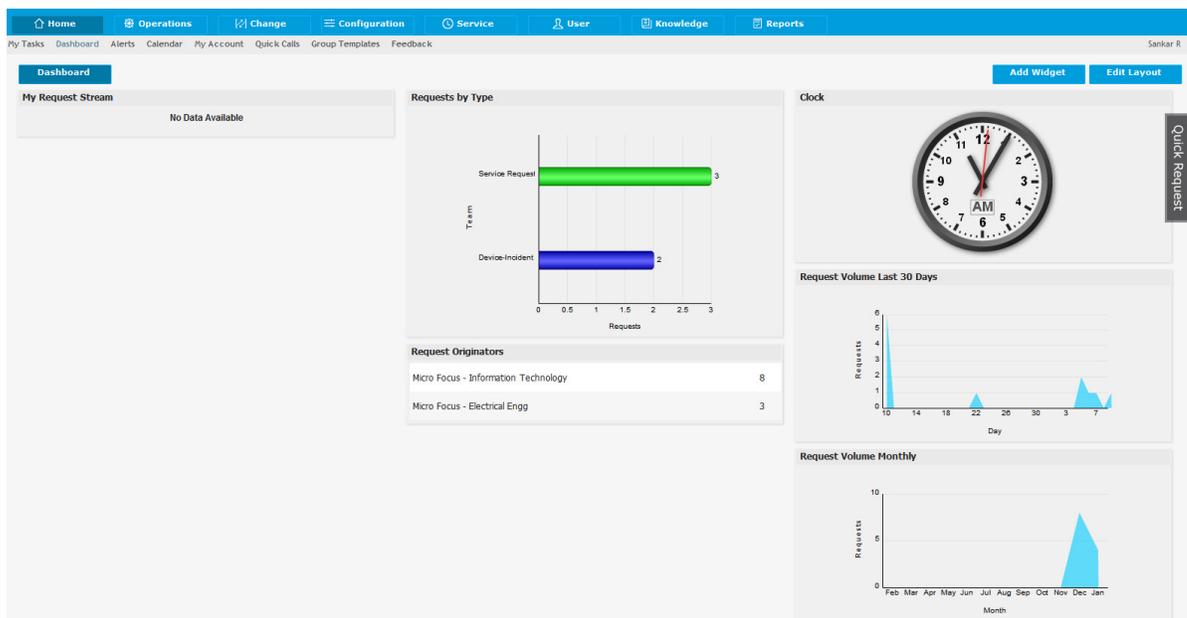
To search on a specific field, within the Term or All Text field enter the name of the field to be searched on followed by a colon and the term or text. For example, if searching for a specific Title, the Term or All Text search field would be completed as follows for the various search types:

- ◆ single word search - title:canceled
- ◆ phrase search - title:"canceled ticket"
- ◆ multiple word search - title:canceled OR title:ticket.

2.3.3 Dashboard

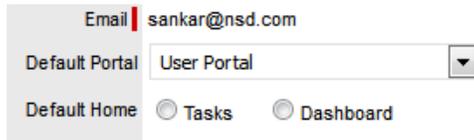
- ◆ [“Dashboard as default Home Tab” on page 145](#)
- ◆ [“Customizing the Dashboard” on page 145](#)
- ◆ [“Widget Menu Options” on page 145](#)

The Dashboard can be customized to display automatically updating request lists, system reports and information using widgets. The Request Stream widget provides Users with a list of requests that automatically updates without requiring a screen refresh, as is required in the My Tasks tab.



Dashboard as default Home Tab

Users can set the Dashboard as their default landing page upon logging into the system, by adjusting the Default Home option within the My Account screen.



The screenshot shows a user profile section with the email 'sankar@nsd.com'. Below the email, there is a 'Default Portal' dropdown menu currently set to 'User Portal'. Underneath, there are two radio button options for 'Default Home': 'Tasks' and 'Dashboard'. The 'Dashboard' option is currently selected.

Select Dashboard, if the you want to set dashboard as the home page.

Customizing the Dashboard

Information displayed on the Dashboard can be adjusted according to the Layout defined and the widgets selected.

To customize the Dashboard Layout, within the Home tab:

1. Select the Dashboard tab

The Add Widget and Edit Layout buttons are visible on the right side of the screen.

2. Click



The Edit Layout window is displayed.



3. Click the image for the required Layout option

The screen will default to the selected option. To move any existing widgets to another location on the screen, click on the widget heading and drag to the preferred location.

Widget Menu Options

To access the Minimize, View Data, Refresh and Delete widget menu options, scroll over the widget header.



Menu Option	Description
Minimize/Maximize	Select Minimize to reduce the view of the widget to the Widget Header. When minimized, the Maximize option becomes available. Click Maximize to display the widget in full.
View Data	Available within the Request Stream widget menu option. Select to view the request details that make up the widget content.
Refresh	Select to manually refresh the data displayed.
Delete	Click to remove the widget from the dashboard. A warning message will be displayed, select OK to continue with the deletion process.

To add widgets to the Dashboard, within the Home tab:

1. Select the Dashboard option

The Add Widget and Edit Layout buttons are visible on the right side of the screen.

2. Click



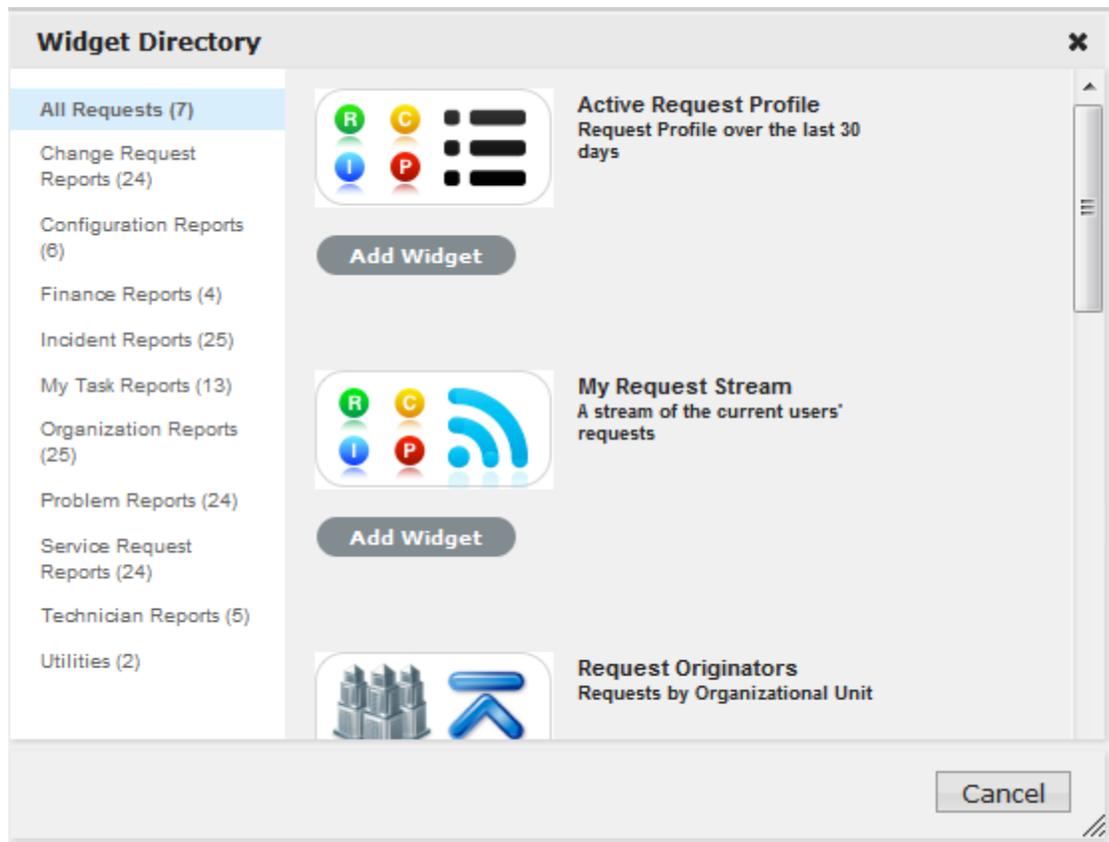
The Widget Directory is displayed with the categories across request types, Configuration Management, Finance and Utilities.

3. Select a widget category

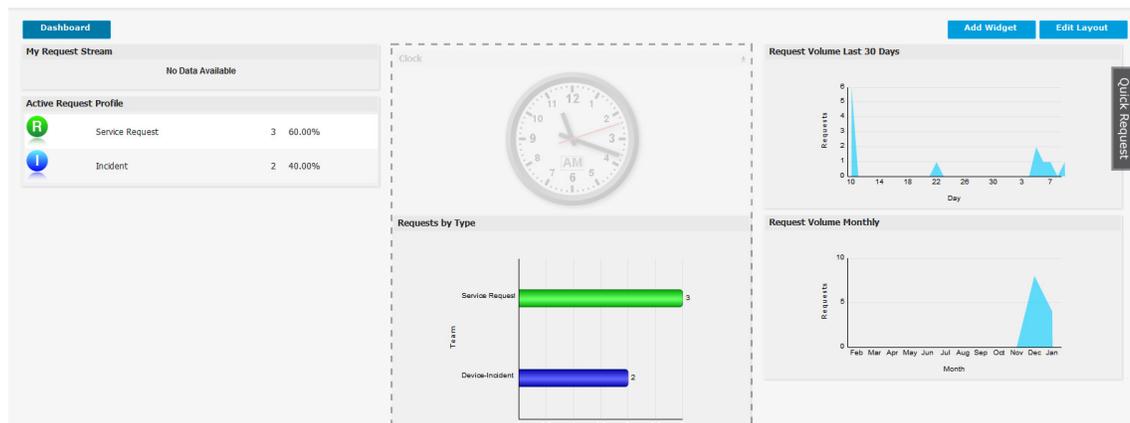
The list of available widgets is refreshed based on the category selected.

4. Click the Add Widget button for the widget to be included on the Dashboard

The widget is applied to the Dashboard and the Directory screen is closed automatically.



- To move the widgets to another location on the screen, click the widget heading to engage the drag icon and move the widget to the preferred place on the dashboard.



2.3.4 Alerts

- ◆ [“Creating Alerts” on page 149](#)
- ◆ [“Deleting Alerts” on page 151](#)

Alerts are an internal mechanism used by Administrators, Supervisors and Technicians to notify Users and Customers about important issues relevant to them or their environment.

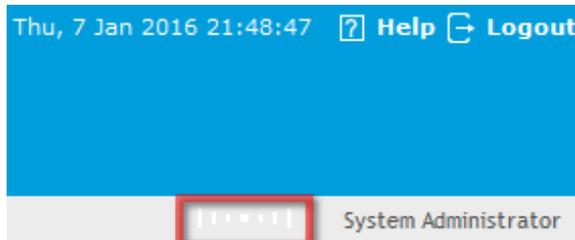
NOTE: It should be noted that Technicians can only create Alerts if enabled by the Administrator in Setup>Privileges>Users.

Alerts generated within the Home tab or within a request can act as reminders or notifications for personal use, for a specific User, or for Users of a particular Role. Alerts can be scheduled to be published and dismissed. Automatically generated Alerts result from SLA warnings and breaches.

System generated Alerts are created for Administrator Users when ADS/LDAP sync and AMIE Item import tasks are completed.

Viewing Alerts

When an Alert is received, the Alert icon flashes in the top right corner, next to the login name:



To view a received Alert:

1. Click on the icon

The Alert screen opens with all current Alerts. The icon in the first column indicates whether the Alert is Information, a Warning or Urgent.



2. Click on the date in the Publish column to view the details of the Alert

The default window displayed will include a Click Here link to access related information such as Incident or Solution details.

3. Click Done to close and keep the Alert, or Dismiss to delete it from the pop-up window and disable the flashing icon
4. To dismiss one or multiple Alerts within the Alerts list, check the boxes next to the relevant Alerts and then select the Dismiss option



5. To subscribe to RSS feeds for Alert updates, select the RSS button.

Creating Alerts

To create an Alert:

1. Select Home>Alerts
2. Select New
The Alerts editor appears.
3. Enter a Publish and Dismiss date

Alert Details	Description
Created	The current date and time.
Publish	The date the Alert is published. Use the calendar icon to the right of the field, to select a Publish date. Set to a date in the future, or use the default to publish the Alert immediately.
Dismiss	The date the Alert ceases to be available. Use the calendar icon to the right of the field, to select a Publish date. On this date, the Alert will disappear from a User's Alert list.
Severity	The type of Alert to be published. The choices are: <ul style="list-style-type: none"> ◆ Information – for general Alerts ◆ Warning – to warn Users of potential issues ◆ Urgent – to publish an urgent actionable message. The icon appearing with the message will depend on the type of Alert.

Alert Details	Description
User	<p>The User type to receive the Alert, which include:</p> <ul style="list-style-type: none"> ◆ Specific Customer or User - In the Find User or Customer list, click search to select the recipient from the drop-down list. ◆ User Role - An Alert sent to a User Role will go to all Users with that Role. ◆ Personal Alert - A personal Alert appears on the User's own screen at the Publish date. ◆ Organizational Units - In the Find Org. Unit field, search and select the recipients. ◆ Public - A Public Alert appears when the Public Alert link is selected on the Login Page.
Title	Enter the title of the Alert.
Message	Enter the main content of the Alert.

4. Select the Severity for the Alert message

5. Select the User

Options include selecting User Roles, a specific User or personal.

6. Enter a Title for the Alert

7. Enter the Message content for the Alert

8. Click Save

Alerts with current Publish dates will be sent immediately.

Alert Editor

Created 01/08/16 11:21

Publish | 01/08/16 11:21 

Dismiss | 01/15/16 00:00 

Severity Information 

User User Role 

Supervisor Technician Partner
 Manager Finance Customer

Title | user alert update 

Message |

Format  Font Family  Font Size  |   HTML

A **B** *I* U ABC |       |  

To receive alert updates on RSS feed.

Path: p Words: 7

9. Click Done.

Deleting Alerts

Alerts can be deleted within the List View by selecting one or more Alert checkboxes and clicking the Delete button. Alternatively, they can be deleted individually within the Alert Editor information screen by selecting the Delete button.

SLA Breach Alerts

Alerts are also used by the system to inform Users about SLA breaches. The Alert will be addressed to the User and assigned to the request that has failed to reach an SLA target. The breach will contain information such as the affected Request ID, and how the SLA has been breached.

Administrator Alerts

The system will generate an Alert for the system Administrator when the system has been synchronized with directory servers or an external asset management tool. Active system Alerts can be viewed by the Administrator in My Accounts>Alerts.

2.3.5 Chat

- ◆ “Enable User Availability” on page 152
- ◆ “Accept a Customer Chat” on page 153
- ◆ “Email Chat Button” on page 153
- ◆ “End Chat Button” on page 153
- ◆ “Request Note” on page 153

Chat allows Customers and Technician Users to interact in real-time, regarding Customer requests. When the system Chat facility has been activated for the application, and if a User has enabled their availability for chat sessions, Customers with an active request can initiate a chat with the User assigned to the Customer’s request. Or, if the Privilege is selected within the application Setup, the Customer can chat with any Technician within the Team assigned to their request.

The Administrator can enable the system Chat facility for the application within Setup>Privileges>System.

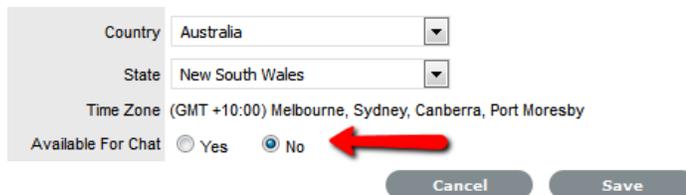
Enable User Availability

If the Chat feature is active for the application, a User must set their availability to Available for Chat, in order for a Customer to access the functionality within the Customer Portal. A Customer can only initiate a chat with the User, if the User is logged into the application and the Available for Chat option is active.

If the User is Available For Chat and the Customer logs onto the Customer Portal to access a request update, the Customer is able to initiate a chat session with the User from within the Chat menu.

To activate the User availability:

1. Select the Home tab
2. Move to the My Account Option
3. Select Edit



The screenshot shows a user profile edit form. It includes dropdown menus for 'Country' (Australia) and 'State' (New South Wales). Below these is the 'Time Zone' field, which is set to '(GMT +10:00) Melbourne, Sydney, Canberra, Port Moresby'. The 'Available For Chat' section has two radio buttons: 'Yes' and 'No'. The 'No' radio button is selected, and a red arrow points to it. At the bottom of the form are 'Cancel' and 'Save' buttons.

4. Select Yes within the Available For Chat option
When the option is set to No, Customers will not be able to initiate a chat with them, from the Customer Portal.
5. Click Save.

With the availability option enabled, Customers can initiate chat sessions with the User from the Customer Portal.

Accept a Customer Chat

When a Customer has initiated a chat, their chat request is placed within a User's chat queue.  is displayed next to the logged in User Name (on the right hand side of the sub-menu bar) to alert the User that a Customer has requested a chat session.

For Users to accept a chat session initiated by a Customer:

1. Click the icon

Or, go to Home > Chat to view the chat queue



Request	Description	Customer	Created	Accept	Remove
100012	unable to connect to Wifi	Jason Blackett	01/08/16 17:03		

1 - 1 of 1 Results

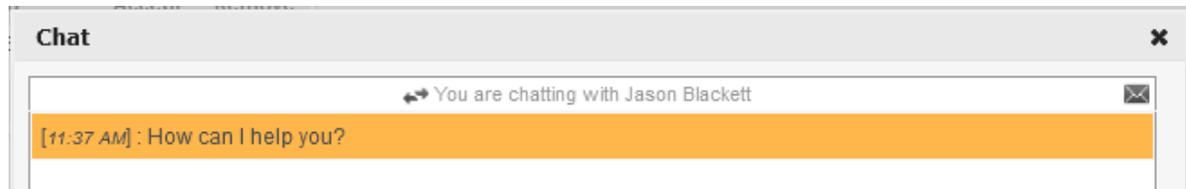
2. At the chat queue, select a chat request by clicking the Accept icon

The chat window opens.

3. The User/Customer chat can commence.

Email Chat Button

A copy of the chat transcript can be emailed to the Customer by selecting the Email button within the chat window.



End Chat Button

To end a chat session, close the chat window. When the window is closed a message is displayed to notify the User that the chat transcript was saved as a request Note.

Request Note

A chat session request Note is created when a chat commences. The Note is continually updated as messages are posted by chat members. When the chat ends, a chat transcript is accessible to Users and the Customer within the Notes tab of the request.

NOTE: It is advised that a chat session *not* be refreshed, as refreshing a chat window will effectively close the chat.

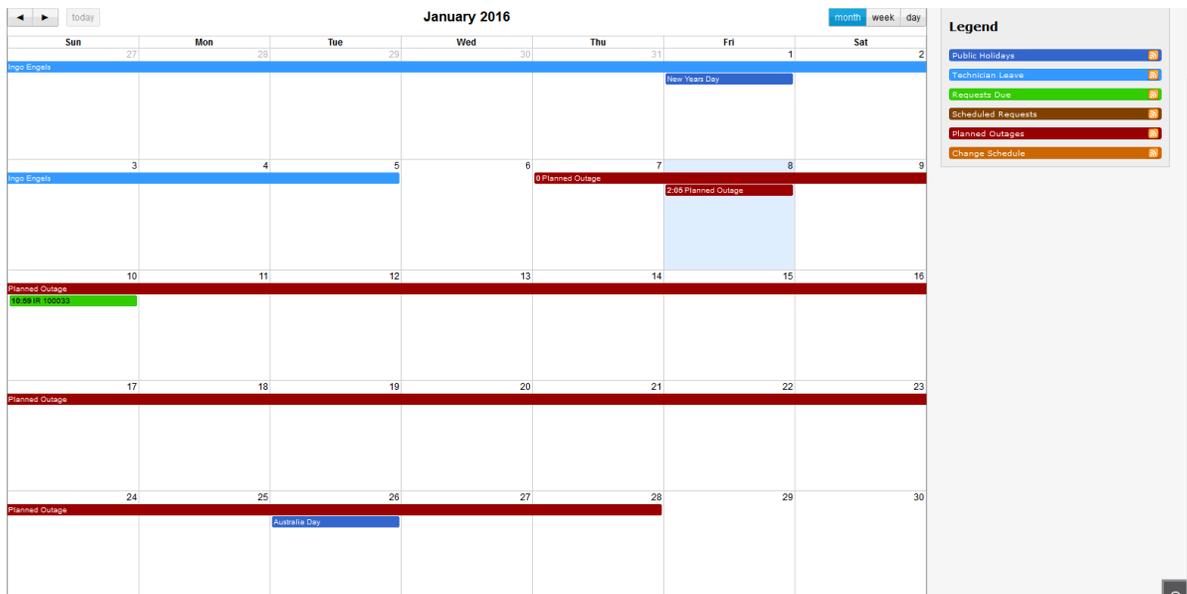
2.3.6 Calendar

- ◆ [“Subscribe to Calendars” on page 154](#)

The Calendar provides Users with information regarding request due dates, planned outages, scheduled vacations and requests. Within the Calendar screen Users of Google Calendar, Microsoft Outlook, Apple iCal or any calendar application that supports the iCalendar format can subscribe to the system's calendar and updates to their schedule are automatically applied to their personal calendar application. The system provides separate Feeds for outages, requests, holidays, vacations and scheduled requests.

Subscribe to Calendars

To subscribe to a calendar feed, select the required calendar in the Legend view and the calendaring tool will display a message wanting confirmation of the subscription. Alternatively, use the calendar application's Subscribe menu option and complete the URL details for the required feed.



To filter the dates displayed in the calendar view, use the month, week and day tab. To view request details, click on the relevant Request ID hyperlink.

2.3.7 My Account

- ◆ [“Editing Account Information” on page 155](#)

The My Account tab allows the User to:

- ◆ Edit personal information and notification preferences
- ◆ Reset their Username and password
- ◆ Set Password questions, if enabled in the system
- ◆ Select the Default Portal and Home tab landing page
- ◆ Set a Time Zone and Date Format.

NOTE: Fields imported through an LDAP or Active Directory server cannot be changed.

Editing Account Information

To edit account information:

1. Select Home>My Account

The Account Information screen appears.

The screenshot shows the 'Account Information' screen for user Sankar R. The screen has a header with 'Account Information' and 'Vacation' tabs, and the user's name 'Sankar R' in the top right. Below the header is an 'Edit' button. The main content area displays the following information:

First Name	Sankar
Last Name	R
Username	sankar@epm.blr.novell.com
Email	sankar@nsd.com
Default Portal	User Portal
Default Home	Tasks
Receive Notifications	On
Notify On	<input checked="" type="checkbox"/> New <input checked="" type="checkbox"/> Update <input checked="" type="checkbox"/> Escalation
Phone	
Mobile	
Fax	
Pager	
Custom 1	
Date Format	mm/dd/yy
Country	
Time Zone	(GMT +5:30) New Delhi

2. Click Edit
3. Make the required changes

Account Information

First Name	First name of the Account User. If account information is imported via LDAP or Active Directory, First Name will not be editable.
Last Name	Last name of the Account User. If account information is imported via LDAP or Active Directory, Last Name will not be editable.
Username	Username name of the Account User.
Password	Password reset.
Confirm Password	Re-enter the password to confirm correct entry of the selected password.
Password Question One/Two	Select questions that are to be asked when the Lost Password link is selected in the Login Page and the challenge questions are required to verify Users details before re-sending the system password. (These fields are displayed when Password Questions option has been enabled in Setup>Privileges>System.)
Answer One/Two	Enter the answers to the questions.
Default Portal	Where a User has more than one Role, the Default Role will be the Role used at login.
Default Home	The User can define the tasks Home tab or the Dashboard tab as the default landing page when they log into the system.
Preferred Communication	Select Email or SMS as the preferred method of receiving updates from the system. This field is visible if the User also has a Customer Role in the system and the Customer Defined Contact option is enabled in Setup>Privileges>CustomerTab. It only applies, when the Team has the Customer Notification option set to Customer Defined.
Email	Email address for the Account User.
<i>Receive Notification</i>	When set to No the User will not receive system-generated emails when requests are created or updated. Irrespective of the setting in this field when a request is escalated to a User, an email notification will be sent.
Phone, Mobile, Pager	Telephone, mobile and pager details. If these fields are imported via LDAP or Active Directory they will not be editable.
Date Format	Preferred date format.

Account Information

Country	When Country details are entered, if the Country has States, a States list will be displayed. (If the option is not available is the displayed list, additional options can be configured by the Administrator in Setup>Localization> Regions.)
Time Zone	User's Time zone
Available for Chat	Using this option Users can select whether they are available for a Chat request, when the Chat facility is enabled.

4. Click Save.

Receiving Email

If a User does not wish to receive email notifications when they are assigned a new request, or when changes are made to a request (i.e., a new request Note has been logged by the Customer) set the Receive Email option to No.

It should be noted that regardless of what is selected for the Receive Email option, if a request is escalated to the User, a notification email is forwarded to them by the system.

2.3.8 Quick Calls

- ◆ [“Scheduled Quick Calls” on page 158](#)
- ◆ [“Creating Quick Call Templates” on page 158](#)
- ◆ [“Applying Time Estimates to Workflow States” on page 162](#)
- ◆ [“Assigning a Solution Article to a Quick Call” on page 162](#)

A Quick Call is a commonly created request that uses a template. Creating a template saves time and effort because the details of commonly created requests can be customized as part of a template that is automatically applied when the request is logged with the system.

If Quick Calls have been enabled by the Administrator in Setup>Privileges>Requests, the Quick Calls sub-menu option is available within the Home tab of the Supervisor screen.

Supervisors create the Quick Calls or Templates for frequently received requests that are used by other Users during the request creation process. Access privileges for Quick Call templates can be set for Supervisors', Technicians', Partners' and Customers' use.

Quick Calls										
New		Filter: QuickCalls [sys] <input type="button" value="v"/> Display: 10 <input type="button" value="v"/>								
Name	Process	Duration	Status	Priority	Requests	Supervisors	Technicians	Partners	Customers	
Laptop not booting	Incident	10	Open	High	1	Yes	Yes	Yes	Yes	
Need Access to E-Learning	Service Request	10	Open	Medium	2	Yes	Yes	Yes	Yes	
Need Email Access	Service Request	10	Open	Medium	2	Yes	Yes	Yes	Yes	
Unable to login in Intranet	Incident	10	Open	High	0	Yes	Yes	Yes	Yes	

1 - 4 of 4 Results

Scheduled Quick Calls

Regularly logged requests can use the Quick Call functionality to automatically create requests in the system when the Supervisor pre-sets the content of the request and customizes a timetable. The system can automatically apply Quick Call templates to create requests on a Daily, Weekly, Monthly, Bimonthly, Quarterly, Bi-Annually, Annually, Bi-Weekly, set Day of Week or on a One Time basis.

Schedule

Status On Off

Customer

Interval

Generation

To access the list of Scheduled Quick Call Templates for use in the system, use the Filter option within the Quick Call sub-menu.

Quick Calls

New Filter: QuickCalls [sys] Display: 10

Name	Process	Duration	Status	Priority	Requests	Next	Date
Laptop not booting	Incident	10	Open	High	1	N/A	N/A
Need Access to E-Learning	Service Request	10	Open	Medium	2	N/A	N/A
Need Email Access	Service Request	10	Open	Medium	2	N/A	N/A
Unable to login in Intranet	Incident	10	Open	High	0	N/A	N/A

1 - 4 of 4 Results

Creating Quick Call Templates

To create a Quick Call Template:

1. Select Home>Quick Calls
2. Click New

The Quick Call editor appears.

Quick Calls

Quick Call

Type

Details

Name

Process

Item

Default SLA

Impact

Urgency

Priority

Access By Role By Team

Supervisors

Technicians

Partners

Customers

Estimate Mins

Schedule

Status On Off

Notification

Customer

Customer CCs

Technician

Technician CCs

Description

Subject

Description

Format Font Family Font Size HTML

A **B** *I* U ABC

Path: p Words: 0

3. Enter template information

Options	Description
Details	
Name*	Enter a name for the template. This will appear in the drop-down list of templates available when creating a request.
Process*	Select the Process in which the template will be used (Incident/Problem/Change/Service Request).
Item	<p>If relevant, select an Item to assign to a Quick Call. This option is not visible when Contracts are enabled.</p> <p>NOTE: If no Item or the Unknown Item is assigned to the template, the Quick Call will be made available in the Request Type drop-down list of the Details tab, after an Item has been assigned to the request.</p>

Options	Description
Classification*	If an Item has been assigned to a Quick Call, the Classification option is displayed. Select the relevant Classification for the Quick Call template.
Default SLA*	Select a default SLA to be assigned to the request. This is applied if the Item, Customer, or Organizational unit does not have a valid maintenance contract. The Default SLA selected determines the Workflow options displayed at Default Workflow.
Default Workflow*	The Workflow list is populated based on the default SLA selected. Select the default Workflow to assign to the request. If the required Workflow is not displayed, move to the Service tab and select Workflows to assign the selected Default SLA to that Workflow. See: Workflows .
Default Status*	<p>Use the drop-down menu to select the Status for the template. This list will be based on the default Workflow selected for the Quick Call.</p> <p>For example, if a template is created for a Password Reset it may be effective to set the status to Closed-Resolved as the request can be solved in one step.</p> <p>NOTE: Select an Exit Point State to access the Solution Tab within the Quick Call Template screen.</p> <p>For Change Request Quick Call Templates, it is possible to set a State that allows the RFC to be pre-approved when created in the system.</p>
Team*	Select the Team to manage the request. The Teams list will be populated according to the Teams who support the Workflow assigned to the Quick Call.
Technician	Select the Technician responsible for the request. The Technician list is based on the Team selected. If System Assigned is selected, the system's logic uses skill set/classification, Org Unit and workload to select the technician for the request.
Impact*	<p>The proposed impact the request has to a Customer or Organizational Unit.</p> <p>(This option is only visible if the Admin>Setup>Privileges>Request>Incident Priority is set to "Derived".)</p>
Urgency*	<p>The proposed urgency to have the request resolved for the Customer or Organizational Unit.</p> <p>(This option is only visible if the Admin>Setup>Privileges>Request>Incident Priority is set to "Derived".)</p>

Options	Description
Priority	If this field is editable, select the Priority that reflects the degree of impact and urgency of the issue. Alternatively, if the Admin>Setup>Privileges>Request>Incident Priority is set to "Derived" the Priority will be automatically calculated based on Impact and Urgency selected in the above two fields.
Access*	<p>The template access can be restricted based on User Role or Team Membership. If By Role is selected, indicate the Users types who can see and use the template in the application (Supervisors, Technicians and Partners). To enable Customers to use the Quick Call template within the Customer Portal, also tick the Customer option.</p> <p>If the Quick Call is to only be accessible Users within a specific Team, select the By Team option to remove the Roles list options and assign the Team from the list displayed. (A Process must be assigned to the template for list of Teams to become visible.)</p>
Estimate*	Is an estimation of the time accrued for the request at the point of creation. This is useful for scheduled requests created in Workflow Exit State, as it records the amount of time taken to complete the automatically generated task.
Description*	A description of the request.
Schedule	
Status	Indicates if the template is a Scheduled Quick Call and if it is to be automatically generated at the times specified in the Interval field.
Customer	Allows the template to be automatically associated with a Customer upon creation.
Interval	Nominates the time interval that the Quick Call is to be created. Select from the options of Daily, Weekly, Monthly, Bi-Monthly, Quarterly, Bi-Annually, Annually, Bi-Weekly, specific day of the week or on a one-off basis.
Generation	Based on the Interval selected, define the month/ day/ time to generate the Quick Call.
Notification	
Customer	If relevant, set the type of Notification and define if updates are to be sent just to the Customer related to the request, or if all Owners of the Item are to be also updated.
Customer CCs	If relevant, enter the email details of any other Customers who must be notified regarding activity related to the request.

Options	Description
Technician	If relevant, set the type of Notification, and select if the Technician, Layer or Team is to be notified about the request activity when it is logged in the system.
Technician CCs	If relevant, enter the email details of any other Users who must be notified regarding activity related to the request.

* Indicates mandatory fields

4. Click Save.

NOTE: When using a Quick Call template with [Billing](#) enabled, the Items available in the Add Item list will be limited to those that belong to the selected Customer and have a valid maintenance contract in place.

Applying Time Estimates to Workflow States

Workflow State time estimations can be defined for a Quick Call template, within the Impact tab. This allows each Status to be assigned with an estimated time frame for a request to remain in that state. This facility is especially relevant for requests created for Change Management and indicating the length of time to complete each stage of a change.

The screenshot shows a configuration window for a Quick Call template. At the top, there are two tabs: 'Description' and 'Impact', with 'Impact' being the active tab. Below the tabs, the 'Status' is set to 'Open'. The 'Estimated Time' field is set to '30' minutes. There are 'Cancel' and 'Save' buttons on the right side of the window.

Assigning a Solution Article to a Quick Call

A Solution Article can be assigned to a Quick Call if the template has been allocated an Exit Point status. Once an Exit Point has been assigned, a Solution tab will become visible. Within this tab, the User can search for a Solution Article and assign it to the Quick Call. When the Quick Call is applied to an Incident or Service Request, the Solution is automatically attached.

The screenshot shows a configuration window for a Quick Call template. At the top, there are three tabs: 'Description', 'Impact', and 'Solution', with 'Solution' being the active tab. Below the tabs, the text 'No solution has been selected' is displayed. There is a 'New' button on the right side of the window.

2.3.9 Group Templates

- ◆ [“Creating a Group Template” on page 163](#)
- ◆ [“Applying Group Templates” on page 166](#)

Project or Group Templates are created by Supervisors as a means to group related Quick Call templates. For example, a Group Template could be created for when a new employee begins work at an organization. The new employee will need a new PC, an email account, a Username and password etc. Rather than creating a separate request for each task, a Group Template could be created including all the Quick Call requests.

Group Templates are available to any User within the system.

Creating a Group Template

To create a new Group Template:

1. Select Home>Group Templates
2. Click New

The Group Template editor appears.

New Group Template

Group Details | **Group Analysis**

Group Name |

Item Type Find Item Type (Name)

Priority

Status

Notification

Access Customers

Custom 1

Custom 2

Custom 3

Description |

Format | Font Family | Font Size | | |

Path: p Words: 0

3. Enter the Group Name
4. Search and select an Item Type the group will be based on, if required
5. Select the Priority for the template
6. Select a default Status (Open or Closed- Resolved) and Notification method
7. Tick the Customers Access option, if Customers are to be enabled to use the Group Template in the Customer Portal.

If this option is selected, the On Save and In Sequence options are displayed, which defines how the individual tasks will be created when the Template is saved by the Customer.

If the In Sequence option is used, the first task within the Group Template is created when the template is selected and saved by the Customer. When the first task is Closed, the next task within the template is automatically created and so goes the auto-creation process until all tasks within the template have been created and closed in sequence.

When the On Save option is selected, all tasks included in the Template are created in the system when the Customer saves the Group Template in the Customer Portal.

8. Enter a Description
9. Click Save

The Group Analysis tab is displayed. The User is required to create Task templates or Quick Calls for the Group Template

The screenshot shows a user interface for managing a Group Template. At the top, there is an 'Information' banner with a blue 'i' icon and the text 'The Group Template has been saved successfully.' Below this, the main section is titled 'Group Template - G1' and has two tabs: 'Group Details' and 'Group Analysis'. The 'Group Analysis' tab is active. On the right side of the tab, there is a 'G1' label and two arrow icons (up and down). On the left, there is a dropdown menu with 'Select...' at the top, followed by a list of options: 'Select...', 'New Quick Call' (highlighted in blue), a dashed line, 'Laptop not booting', 'Unable to login in Intranet', 'Need Access to E-Learning', and 'Need Email Access'. To the right of the dropdown is a 'Cancel' button. Below the dropdown is a table with the following data:

Status	Priority	Classification	Duration
In Progress	Medium	Question	12

Below the table, there is a '1 - 1 of 1 Results' indicator. At the bottom right, there are 'Cancel' and 'Save' buttons.

10. Assign a pre-existing Quick Call by selecting options displayed beneath the dashed line and selecting the Add button
11. Create new templates by selecting New Quick Call in the drop down list.
The Quick Call editor is displayed.

12. Enter Quick Call details and Save

For more information about configuring Quick Call templates, see: [Quick Calls](#).

NOTE: If the system requires an Item to be assigned to a Quick Call template, assign the Unknown Item and the new Item details can be further refined when the Task becomes active in the system.

13. Continue to create additional Task templates, as required
14. When all relevant Quick Call templates have been created for the Group Template, click Done.

Group Template - G1

Group Details Group Analysis

Edit G1

<input type="checkbox"/>	Order	Template	Status	Priority	Classification	Duration
<input type="checkbox"/>	1	G1	In Progress	Medium	Question	12
<input type="checkbox"/>	2	Qc1	In Progress	Medium	Question	12

1 - 2 of 2 Results

Done

NOTE: To change the order of requests in the Tasks list, select the checkbox beside the Order ID and use the   buttons.

Applying Group Templates

See: [Incident Groups](#) or [Change Groups](#) for more information on applying a Group Template.

2.3.10 Feedback

- ♦ [“Completing a Survey” on page 166](#)

Within the Feedback tab, Users can complete published surveys in order to provide useful feedback relating to service and support activities. This information is then collated and available within the Knowledge Base tab.

Completing a Survey

When a Survey is published, it can be completed by Users and Customers. To complete a Survey as a Supervisor or Technician User:

1. Select Home > Feedback
2. Select the Take Survey hyperlink

Survey List

General Surveys

Title	Description	
Reviewing procedures	Reviewing the current change management procedures	Take Survey

1 - 1 of 1 Results

3. Complete the Survey

Reviewing procedures

Reviewing the current change management procedures

Response Details

1- Do you approve of the current updating process for customer details

Yes No Undecided

2- If not, how could the process be improved?

Clear Cancel Done

4. Click Done.

2.4 Operations

- ◆ [Section 2.4.1, “Request Fulfillment,” on page 167](#)
- ◆ [Section 2.4.2, “Incident Management,” on page 284](#)
- ◆ [Section 2.4.3, “Problem Management,” on page 358](#)
- ◆ [Section 2.4.4, “Problem Assignment and Escalation,” on page 401](#)
- ◆ [Section 2.4.5, “Billing/Contracts,” on page 405](#)
- ◆ [Section 2.4.6, “Known Errors,” on page 406](#)

2.4.1 Request Fulfillment

- ◆ [“Overview” on page 168](#)
- ◆ [“Creating a User Account \(Internal Authentication\)” on page 170](#)
- ◆ [“Service Requests” on page 182](#)
- ◆ [“Service Request Groups” on page 274](#)
- ◆ [“Creating a New Group via the Request Groups Tab” on page 275](#)
- ◆ [“Creating a Service Request Group using a Group Template” on page 276](#)
- ◆ [“Analysis Tab” on page 280](#)
- ◆ [“Elements Tab” on page 281](#)
- ◆ [“Merging Service Request Groups” on page 281](#)
- ◆ [“Closing a Request Group” on page 282](#)
- ◆ [“Duplicated Service Requests” on page 283](#)

Overview

- ♦ [“Implementing Request Fulfillment” on page 168](#)

The goal of Request Fulfillment is to manage the lifecycle of all Service Requests.

A Service Request is a generic term that describes the numerous and varied demands placed on the service and support organization. Many are small changes, which are considered to be low risk, frequently occurring and low cost in nature, such as change a password or install a software application request. Alternatively, it may simply be a Customer asking for information. It is the scale, frequency and low-risk nature of the Service Requests that require that they be handled by the Request Fulfillment process, and not Incident or Change Management.

The frequent recurrence of Service Requests requires a predefined process Workflow be set with the support Technicians, service targets and escalation paths in place. To cater for the diverse nature of Service Requests, at minimum two Workflows should be customized for Request Fulfillment, one to handle simple requests for information and the other to deal with standard changes.

In the system, Service Requests are logged against Service Items in the Service Catalog and follow Workflows that ensure that each Request is handled with consistency. The Workflows define the actions required to correctly implement any changes to the Service and define the responsibilities, authorization and timeframe expected to manage the changes that may result from a Service Request.

Once a Workflow is assigned to a Service Request, it is routed to an appropriate Technician based on Service Request Workflow State. After a Technician completes their assignment, the Request is forwarded to the next User based on the configuration of the next State for a standard change or closed, if it is a simple request for information.

When Service Requests are raised for Service Item breakdowns, the system allows them to be easily associated with an Incident within the Analysis tab of the Request. Or, if the Service Request results in a change to an Item that is not in the Service Catalog, a Change Request can easily be generated within the Service Request.

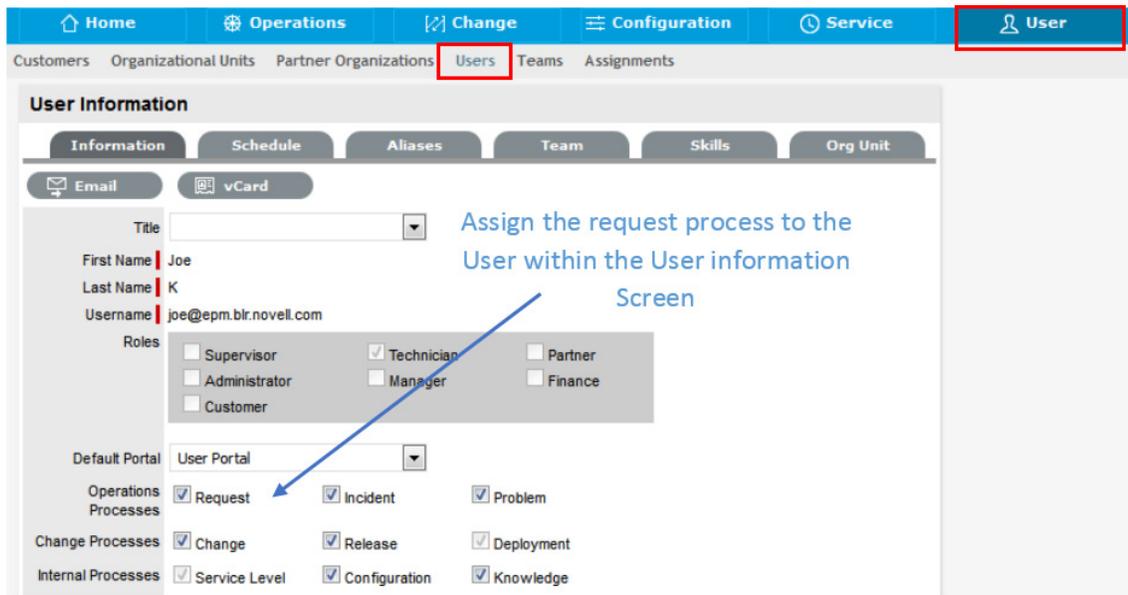
If a Service Request is related to an Incident, Problem or Change Request and that related request in the other Process is closed, the Service Request is automatically closed. The system views the request hierarchy from low to high as Service Request, Incident, Problem and Change Request, and if a related request of a higher type is closed, all the lesser type requests are automatically closed, or if the handshaking facility is enabled for the system, moved to the Pending-Approval State.

See: [Service Catalog](#).

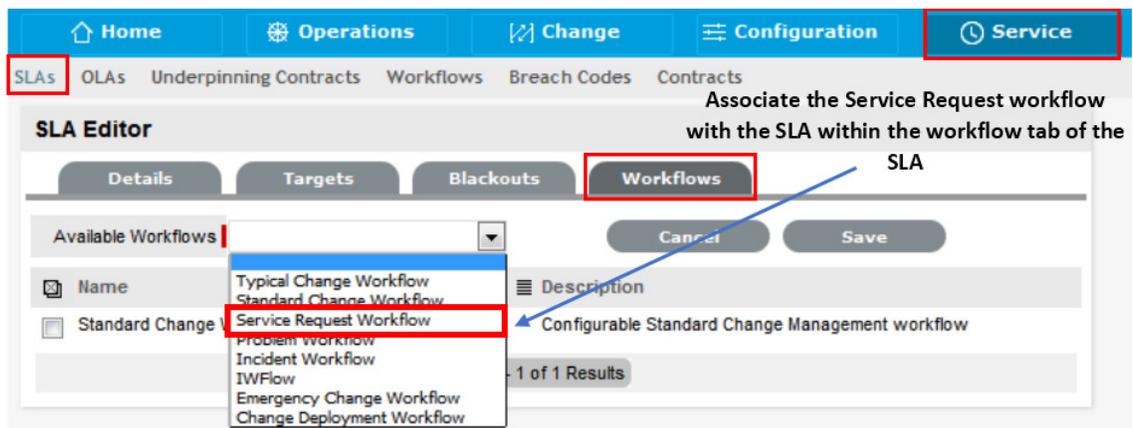
Implementing Request Fulfillment

To set up the Request Fulfillment Process in the system, the following steps are to be completed:

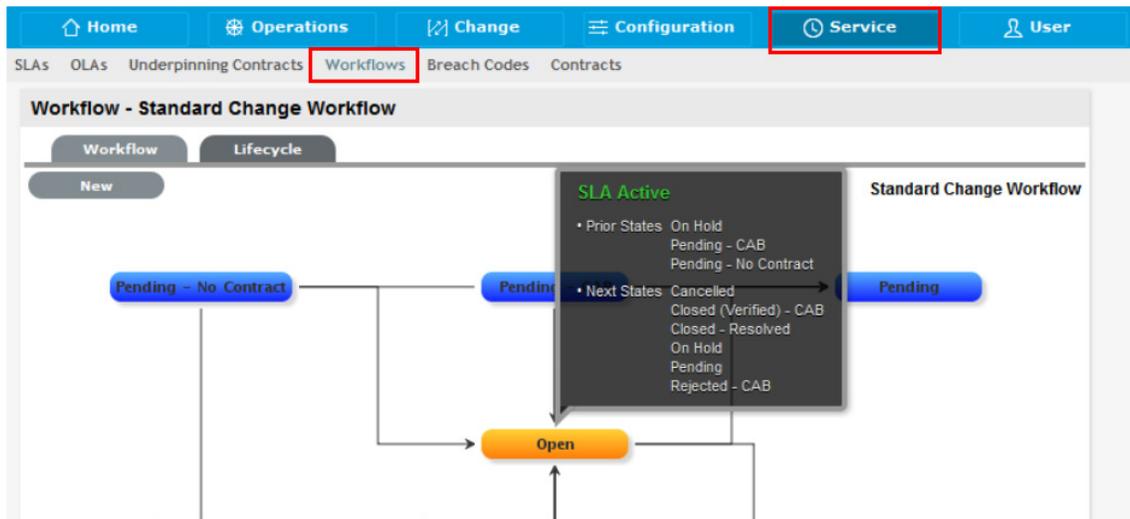
1. Assign the Request Process to the relevant Users within the User Information screen under the User>Users tab. (See: [Create a User](#).)



2. Create or review the SLA within the Service>SLAs tab, and associate the Incident Service Request Workflow to the SLA in the SLAs Workflow tab. (NB: The Supervisor User setting up the SLA must be assigned the Internal Process of Service Level in their User Information screen to complete this action.)



3. Review the Service Request Workflow within the Service>Workflows tab. (See: [Service Request Workflow](#).)



4. Create a Service Request Team within the User>Teams screen.

5. Associate the SLA to an Item or Customer or Org Unit. This final step ties all the elements together when a Service Request is created, as the SLA associated with the Item, Customer or Org Unit assigned to the Request determines the Workflow, Team and Technicians that are made available within the Service Request Information screen.

Creating a User Account (Internal Authentication)

Users within the system that are to be assigned to support Teams must be allocated one of the following Roles:

- ◆ Technician
- ◆ Supervisor
- ◆ Partner.

The above User Roles can work on requests. The About Roles section of the User Guide provides more information regarding specific User Roles in the system.

Creating a User Account

When creating a new User, the following four tabs are available:

- ◆ Information
- ◆ Schedule
- ◆ Aliases
- ◆ Team
- ◆ Skills
- ◆ Types.

Information Tab

Within the User Information tab, User details can be created, viewed and edited. User Roles, Process assignment and default logins can all be customized within this tab.

To create a new User:

1. Select User>Users
2. Click New

The User Information screen appears.

User Information Fields

Title	Select a title from the drop-down menu options. (This field is displayed if the Enable Titles option is set to Yes in the Admin>Setup>Setup>Privileges>Customer tab.)
First Name*	Enter the User's First Name.
Last Name*	Enter the User's Last Name.
User Name*	Enter a LiveTime User Name (unique).
Password*	Enter a User Password. Note: Passwords can be changed under the Users Tab or reset by the User under their My Account tab.
Roles*	Assign a Role for the User. Each Role has associated permissions. See User Roles . Every Technician Role assigned also needs a Supervisor assigned. NOTE: Note: More than one Role can be assigned but only one of Supervisor, Partner or Technician can be allocated per User.
Default Portal*	The Default Portal is the User Interface accessed by default when a User with multiple Roles logs into the system. NOTE: If the Users Default Portal is set to Customer, the User details will not be accessible in the Users list, but included in the list within the User>Customer tab.

User Information Fields

Assignment Template	<p>This option is visible in a new User Information screen if Job Assignment Templates are configured in the User> Assignments tab.</p> <p>Select a template to assign the new User to multiple Teams, Escalation layers and Processes.</p>
Operations Processes	<p>Assign the licensed access for Request Fulfilment, Incident and Problem Management.</p> <p>Assigning Processes to the User gives them access to support those Processes and enables them to be assigned as Team members for those Processes' Teams.</p> <p>See User Processes.</p>
Change Processes	<p>Assign the licensed access for Change, Release and Deployment Management. Note, Users assigned Release are automatically assigned Deployment.</p>
Internal Processes	<p>Enable the Users privilege to maintain Service Level, Configuration and Knowledge Management.</p> <p>Selecting the Configuration and Knowledge options displays the relevant fields that enable granular controls to be set for those processes.</p> <p>NOTE: The Finance Role is limited to the processes of Configuration and Service Level Management.</p>
Knowledge	<p>If the User is assigned the Knowledge Management process, their privilege to create, edit, delete and/or publish KBAs can be configured.</p>
Configuration	<p>If the User is assigned the Configuration Management process, their privilege to create, edit and/or delete Items within the CMDB can be configured on a per task basis.</p>
Customer Org Unit	<p>If the User is also allocated a Customer Role within the system, this field is displayed. Enter Company or Department details that apply to the User in their Customer Role.</p>
Line Manager	<p>(This field is visible if the User is also assign a Customer Role within the system. The information can not be edited if the line manager details are set by the LDAP synch.)</p> <p>If relevant, assign a system user with the Customer Role who can approve/reject requests made by this Customer.</p>
Primary Email*	<p>Enter the User's email address. System messages are sent to this address.</p>

User Information Fields

Send To	<p>This field becomes available for Users that have the Customer Role and have alternate email addresses entered on the Aliases tab.</p> <p>Select the most appropriate email address to be set as the default address applied to Customer correspondence. When the Send To field is set to an alias address the Primary Email address is not included in the cc list, unless specified in the request Information tab cc list.</p>
Phone	Enter telephone details.
Mobile	<p>A mobile number can be entered as a contact number or for use with SMS (Short Mail Service message). An SMS can be sent to notify the assigned Technician when a Service Request is raised.</p> <p>SMS Messaging options:</p> <ul style="list-style-type: none">♦ From the drop down list, select the SMS service provider.♦ Override SMS Address. If your service provider does not appear in the list, click this checkbox and enter an alternate Service Provider.
SMS Override	<p>Enter SMS Gateway override details for the User, if a number other than the one entered in the Mobile field is to be used to send/receive updates via SMS. Enter the complete SMS details in email address format, i.e., 000777891@smsgateway.provider.com.</p>
Fax	Enter known fax details.
Pager	Enter pager details.
Salary	An annual salary can be entered. This value is used for reporting.
Forum Moderator	Select this checkbox to designate this User as a forum moderator. See Forums.
Survey Manager	Select this checkbox to enable this User to create and manage surveys in the system.
Supervisor*	Select a Supervisor, if the User has a technician role. Users with the Technician Role must be allocated a Supervisor.
Partner For	When a User is assigned the Partner Role, their associated Partner Organization must be assigned within this field.
Partner	If the User is also assigned a Customer Role, this field allows the Customer to be associated with a Partner Organization who will handle their requests when they are logged in the system.

User Information Fields

Available	Shows if the User is available for requests to be assigned to them. This is based on work hours configured in the Schedule tab of the User and their Vacation Status. If no hours are set within the Schedule tab when the "Define Works Hours" is enabled within Admin>Setup>Privileges>User screen and the User is not on vacation, the system will consider them to be unavailable.
Assignment	**Visible when the Assignment Control is enabled in Admin>Setup>Privileges>User. Set to Off if the User is not to be assigned new requests, irrespective of their Availability status.
On Vacation	Placing a Technician on vacation excludes them from being assigned new requests automatically. When On Vacation is activated a Technician's existing requests are not reassigned.
Training	This option is only visible for Technician Users, and when enabled allows the User to be included in Teams to view requests but does not allow them to put the request in edit mode or add Notes.
Email Locale	Adjust the default language for email correspondence, if required.
Country	The User automatically adopts the default Country set for the system. However, the Country can be manually adjusted here for the specific User.
State	Set the State information based on the Country selected, if required.
Timezone	The User automatically adopts the default Timezone set for the system. However, the Timezone can be manually adjusted for the specific User.
GPS	The GPS coordinates of the last known address.

* Denotes Mandatory Fields

1. Complete the User detail information
2. Click Done.

Emailing User Details



To email a User regarding their system log in credentials, click the Email button within the User Information screen. If Random Passwords is enabled, selecting Email will reset the Password and forward the details to the User. If Password Questions is enabled in Setup>Privileges>System, selecting Email will send a link to the User directing them to a page that includes the security questions set for their account and reset the password based on the answers provided. Customers must complete this process within an hour of the email being sent.

vCard Button



Select this option to download and open the User's information in an electronic business card format, to email or save outside the system.

Schedule Tab

By default the Schedule tab includes the On Vacation option, which can be set to Yes when the User takes leave. The system will automatically reassign the User's active requests, if the Vacation Reassign option has been enabled in the Admin>Setup>Privileges>User tab. If this option has not been enabled, a Supervisor User will need to manually reassign the requests, if required.

If the system Setup has been configured to Define Work Hours and Schedule Vacations, this additional functionality is available within the Schedule tab.

The screenshot shows the "User Information" interface for "Ingo Engels". The "Schedule" tab is active. Under "Working Hours", the time zone is "(GMT +5:30) New Delhi". The "Apply Template" dropdown is empty. The working hours are defined as follows:

Day	Start Time	End Time
Sunday	<unavailable>	<unavailable>
Monday	09:00	17:00
Tuesday	09:00	17:00
Wednesday	09:00	17:00
Thursday	09:00	17:00
Friday	09:00	17:00
Saturday	<unavailable>	<unavailable>

Under "Holidays", the "On Vacation" option is set to "No". There are "+" and "-" buttons for the "Schedule" section. Below this is a table with columns: Purpose, Start Date, End Date, and Active. The table is currently empty, showing "0 - 0 of 0 Results". At the bottom right, there are "Cancel" and "Save" buttons.

Define Work Hours

Use the drop-down lists to set the hours of work when the User is available for the week. Based on what is set here, the system will assign requests to the User during their available hours. However, if no other Technician is available for requests based on their defined work hours, the system will assign the User new requests outside of their set work hours.

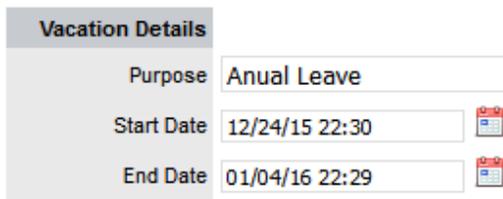
NOTE: If the Technician Define Work Hours option has been enabled, the hours of work **MUST** be defined, otherwise the system will ignore the Technician Assignment logic and automatically allocate new requests to the Team Lead.

Schedule Holidays

The Schedule Holidays functionality allows the Supervisor to pre-book leave in the system for Users. There are no restrictions on the number of days that can be set, and based on the configuration, when a leave period is activated, the system will automatically reassign active requests to other available Users applying the Technician Assignment logic. If the request was initially drawn from an Incident Queue, it will not return to the Queue but be reassigned to the most relevant Technician based on the Technician Assignment logic.

As a Supervisor User, to schedule User leave:

1. Go to the Users>User option
2. Select the hyperlink name of the User
3. Move to the Schedule tab
4. Click Edit
5. Select 
The Vacation Details window is expanded.
6. Enter the reason for leave in the Purpose box

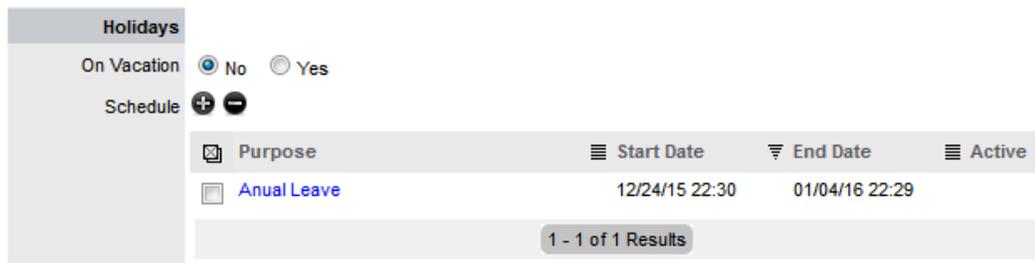


The screenshot shows a 'Vacation Details' form with the following fields:

Purpose	Annual Leave
Start Date	12/24/15 22:30
End Date	01/04/16 22:29

7. Complete the Start and End date details
8. Click Save

The details are recorded in the database and when the Start Date is reached, new requests will not be assigned to the User. After the scheduled End Date, the User account will be automatically re-activated.



The screenshot shows the 'Holidays' section with the following details:

On Vacation: No Yes

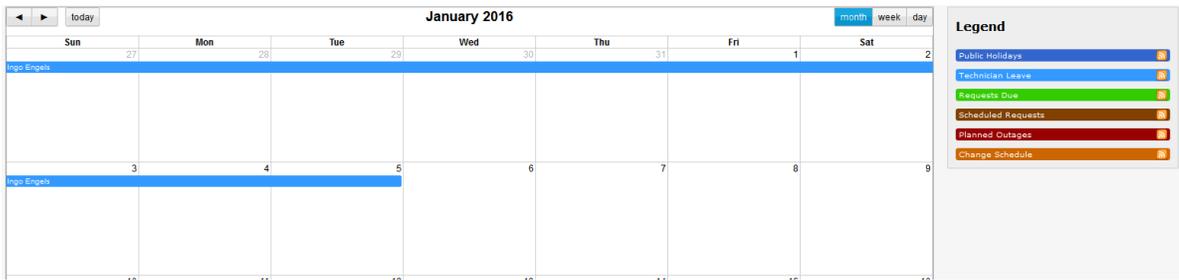
Schedule:  

Purpose	Start Date	End Date	Active
Annual Leave	12/24/15 22:30	01/04/16 22:29	

1 - 1 of 1 Results

It should be noted that if the User on vacation is a Team Lead for any Teams where there are no Technicians available for new request assignment, the system will allocate new requests to the Team Lead, regardless of their vacation status.

The Supervisor Events calendar in the Home Tab shows when Users on vacation:



Aliases Tab

NOTE: Use the Aliases tab to enter additional email addresses. Email addresses in the Aliases tab allow the User to send emails to the System or Team support addresses from more than one address. The system creates requests from these emails. Notifications for requests created using an address in the Aliases tab, are sent to the main email address and cc'd to the alias address that was used to create the request.

This is only applicable if the User has the Customer Role.

When one or more alias email addresses have been created for a Customer, a Send To field is displayed on the Customer Information screen, which allows the most appropriate email address to be set as the default address applied to Customer correspondence. When the Send To field is set to an alias address the Primary Email address is not included in the cc list, unless specified in the request Information tab cc list.



To add an alias email address:

1. Select User>Users
2. Click on the User name
The User Information screen appears.
3. In the Information tab, click Edit
4. Select the Aliases tab
5. Enter an alias email address
6. Click Save.

When an alias email address has been created for a Customer, a Send To field is displayed on the Customer Information screen, which allows the alias email address to be set as the default address applied to Customer correspondence.

An alias will only be used if the User has a Customer Role.

Team Tab

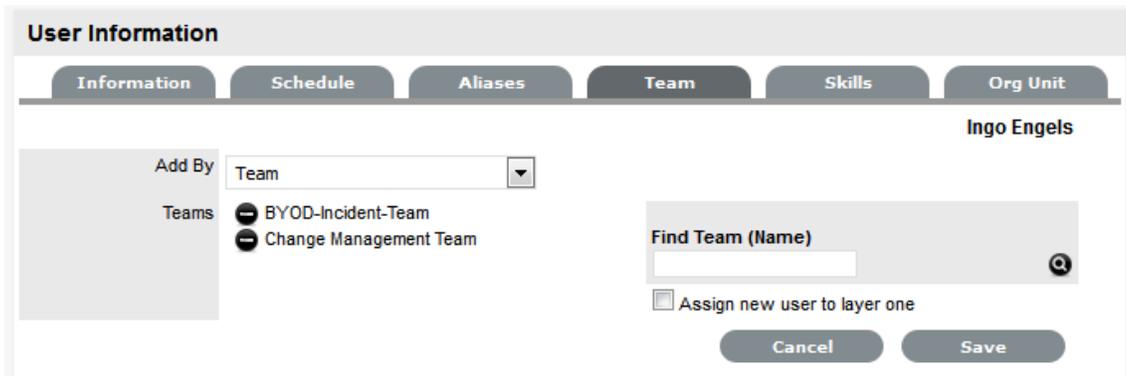
The User Team tab lists Teams associated with the selected User. Use this section to assign the User to one or more support Teams, making the additions by Team or job Assignment templates that have been configured in the system. Processes selected in the Information Tab for the User determine the Teams available in the Team tab.

Once a User is assigned to the Team, the Supervisor must configure the escalation layers for the Team to include the new User. However, the User can easily be added to Layer One of escalation when associated with a new Team by ticking the "Assign new users to layer one option" when assigning the Team within this tab. Also, if Assignment templates are created in the system, by selecting the Team template, the User will automatically be added to Teams, Escalation Layers and Work Groups configured within the selected template.

NOTE: The User must be assigned the relevant Processes for Support Teams to be shown in Team search results. If an Assignment template is selected and includes Teams for Processes the current User is not allocated, those Teams will not be included on the template.

To add a User to a Team within the Team tab:

1. Click Edit



The screenshot shows the 'User Information' interface with the 'Team' tab selected. The user 'Ingo Engels' is shown. The 'Add By' dropdown is set to 'Team'. Under 'Teams', two options are listed: 'BYOD-Incident-Team' and 'Change Management Team'. A search box labeled 'Find Team (Name)' is present, along with a checkbox for 'Assign new user to layer one'. 'Cancel' and 'Save' buttons are at the bottom.

2. Using Add By Team, enter a Team Name in the Find Team field and click 
Or, leave the field empty and click . The Teams for Processes that the User is assigned are displayed in the search results.
3. Tick "Assign new user to layer one", if relevant
4. Select a Support Team link
The User is assigned to the Team and layer one of escalation if appropriate.
5. Click Save.

To add a User to a Team within the Team tab using Assignment templates:

1. Click Edit
2. Within the Add By field, select Team Template
Job Assignment Templates that have been configured in the User>Assignments tab are displayed, but only including Teams consistent with the Processes assigned to the User.

User Information

Information Schedule Aliases **Team** Skills Org Unit

Ingo Engels

Add By: Team Template

Templates:

Cancel Save

3. Select one or more Template options
4. Click Save.

The User is automatically included in the Teams, Escalation Layers and Work Groups configured in the Template.

User Information

Information Schedule Aliases **Team** Skills Org Unit

Ingo Engels

Add By: Team Template

Templates: New Template

Team Name	Layer
Portfolio	Management

1 - 1 of 1 Results

Cancel Save

To remove a User from a Team:

1. Select User>Users
 - The User Information screen appears.
2. Click on the name of the User
3. Select the Team Tab
4. Click Edit
5. Select  to remove a Team assignment
6. Click Save
7. Click Done.

NOTE: If a User is the Team Lead or the only person assigned to an escalation layer they cannot be removed from a Team under this tab.

Skills Tab

Use this section to assign any specific Classifications that are to be handled by a Supervisor, Technician or Partner. This assignment assumes areas of expertise for Users assigned to these Classifications. This allows the system to automatically route requests logged against these Classifications to the most appropriate User.

NOTE: Prior to using the Skills tab, the Supervisor should configure Items and Classifications.

Assigning a Classification

To assign a Classification:

1. Select User>Users>Skills
2. Click Edit to display the Add button
3. Click Add
4. Select the Item Category

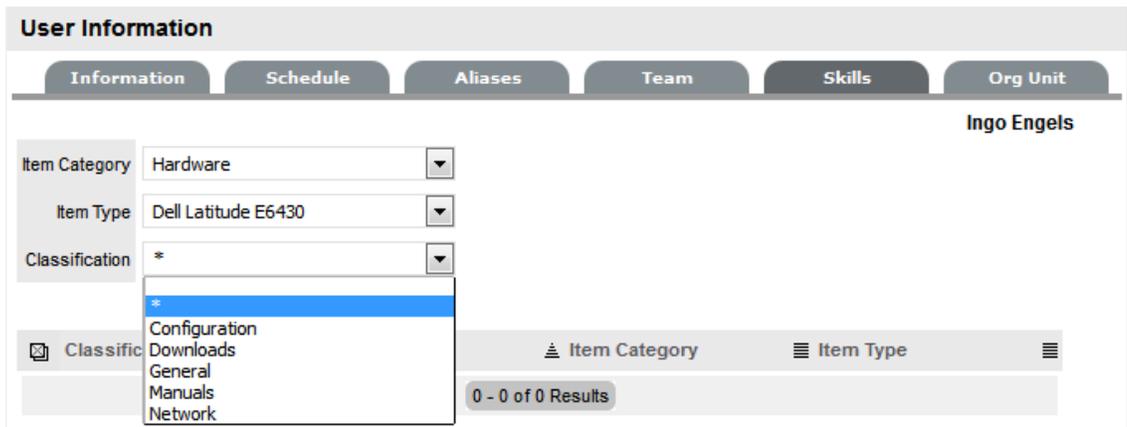
The Item Type and Classification Type drop-down list is displayed.



The screenshot shows the 'User Information' interface for 'Ingo Engels' in the 'Skills' tab. The 'Item Category' dropdown is empty. Below it are 'Cancel' and 'Save' buttons. A table header is visible with columns for 'Classification', 'Item Category', and 'Item Type'. The table currently shows '0 - 0 of 0 Results'.

5. Choose an Item Type, if relevant
6. Select * to assign all Classifications as Skills or choose a specific Classification

The list displayed will include all Classifications configured for the Item Category and the Item Type, if an Item Type is selected.



The screenshot shows the 'User Information' interface for 'Ingo Engels' in the 'Skills' tab. The 'Item Category' is set to 'Hardware', 'Item Type' is 'Dell Latitude E6430', and 'Classification' is set to '*'. A dropdown menu is open under 'Classification', showing options: '*', 'Configuration', 'Downloads', 'General', 'Manuals', and 'Network'. The table header and '0 - 0 of 0 Results' are also visible.

7. Click Save
8. Click Done.

NOTE: The Classification assigned to the User is either based on the Classifications of an Item Category or Item Type, hence displaying two columns. However, the Item Type column will only include information when the Classification selected is specific to that Item Type, and not directly related to the Item Category.

To remove a Classification:

1. Select User>Users

The User Information screen appears.

2. Click on the name of the User

3. In the Skills tab, click Edit

The Delete button appears at the bottom right.

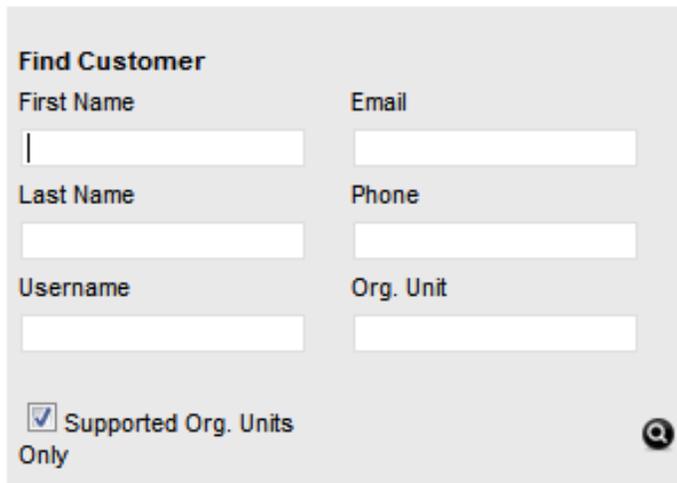
4. Click the checkbox next to the Classification. Multiple Classifications can be checked

5. Click Remove

6. Click Done.

Org Unit Tab

Use this section to assign one or more Org Units to a Supervisor, Technician or Partner, which will result in requests that are logged by these Org Units being routed to the assigned Users. When Users are assigned to support Organizational Units, the Find Customer option during the request creation process displays the "Supported Org. Units Only" option. This limits the Customer search results to those Customers who belong to the Org. Units the logged in Technician is assigned to support.



The screenshot shows a search form titled "Find Customer". It contains six input fields arranged in two columns. The left column has fields for "First Name", "Last Name", and "Username". The right column has fields for "Email", "Phone", and "Org. Unit". Below the input fields, there is a checkbox labeled "Supported Org. Units Only" which is checked. A magnifying glass icon is located to the right of the checkbox.

Assigning an Org Unit

To assign an Org Unit:

1. Select User>Users>Org Units
2. Click Edit to display the Find Org. Unit search field
3. Enter any known Org. Unit details or leave the field blank to return the full list of Org. Units recorded in the system

4. Click 
5. Click on the Org. Unit name hyperlink to associate it with the User
Multiple selections may be made, if required.
6. Click Save.

Removing an Org Unit

To remove the association between a User and an Org Unit:

1. Select User>Users
The User Information screen appears.
2. Click on the name of the User
3. In the Org Units tab, click Edit
4. Select  next to the relevant Org Unit/s
The Org Unit/s details are removed from the tab
5. Click Save
6. Click Done.

Re-enabling Deleted Accounts

Administrators have the ability to reactivate deleted User accounts.

To enable a deleted account:

1. Within the User>Users tab, select the Search button
2. Select Deleted as the Account Status search option
3. Click Search
A list of deleted Users is displayed.
4. Select a User to re-enable
The User information page appears.
5. Click the Enable button, to reactivate the account.
The User account becomes active and is available within the application.

Service Requests

- ◆ [“Creating a Service Request:” on page 184](#)
- ◆ [“Service Request Queue” on page 184](#)

- ◆ “Service Request Search Tips:” on page 184
- ◆ “RSS Feeds” on page 185
- ◆ “Queues for requests” on page 185
- ◆ “Customer Tab” on page 190
- ◆ “Advanced Search Option” on page 192
- ◆ “Item Information” on page 193
- ◆ “Creating an Item during request creation” on page 195
- ◆ “Quick Calls” on page 214
- ◆ “Contract Tab” on page 216
- ◆ “Details Tab” on page 217
- ◆ “Analysis Tab” on page 218
- ◆ “Summary Tab” on page 239
- ◆ “Notes Tab” on page 246
- ◆ “Attach Tab” on page 252
- ◆ “Impact Tab” on page 253
- ◆ “Audit Tab” on page 257
- ◆ “Item Relationships” on page 258
- ◆ “Related Requests” on page 263
- ◆ “Managing Related Requests” on page 265
- ◆ “Billing: Contracts and Invoices” on page 269



Service Requests are customer requests logged against Items that use the Service Category.

The Request Filter displayed by default in the Request tab is the All Service Requests, which lists all Service Requests logged in the system regardless of their status or assignment. The available List Filters include:

Filter	Description
All Service Requests	Displays all Service Requests logged in the system regardless of their Status or Assignment.
My Service Requests (Active)	Displays all Requests in an active Workflow State that are assigned to the logged-in User.
My Service Requests (All)	Displays all Requests, in active and inactive Workflow States, that are assigned to the logged-in User.
My Teams Service Requests (Active)	Displays all Requests in an active Workflow State, allocated to the Teams with which the User is associated.
My Teams Service Requests (All)	Displays all the Requests, in active and inactive Workflow States, allocated to the Teams with which the User is associated.

Filter	Description
Pending Approvals	Provides the User with quick access to a list of Service Requests that require Manager approval. (This is only available if the User has Manager access.)
Service Request Queue	Displays Requests assigned to the System User by default, which Technicians can reassign after viewing (This is only available if the functionality is enabled for the system and Team.)

The default display is ten Requests per batch. The list can be re-sorted by clicking on a column header and the number of Requests displayed per batch can be altered using the Display pop-up option.

Creating a Service Request:

To create a Service Request the following information is required:

- ♦ [Customer Details](#)
- ♦ [Item Details](#)
- ♦ [Contracts Details](#)

Service Request Queue

Service Requests that are created by Customers through the Customer Portal or via email, can be forwarded to a holding bay or queue, if this functionality is required by the Service Desk. The capability can be enabled system-wide but applied on a per Service Request Team basis, as needed.

When a Service Request is assigned to the Queue, the name applied in the Technician field is System User.

See: [Queues](#).

Service Request Search Tips:

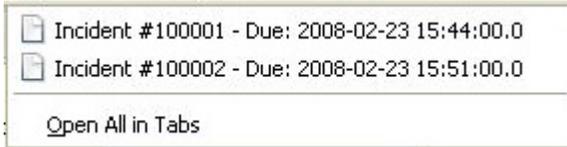
- ♦ The Request search option has a default status to search only Active Requests. To ensure search success, select the relevant Incident status, if unsure, select All
- ♦ To search for multiple Requests numbers at once, insert a comma separator between ID numbers
- ♦ To search based on a Request status, select the Service Request Workflow option from the Workflow drop-down list. Once selected, a list of States is displayed
- ♦ To search by Classification, select an Item Category from the Category drop-down list. After the Category is chosen, a list of Classifications is displayed
- ♦ To search based on the content of a Service Request Description, select the Full Text option within the Search and enter a relevant term (See:[Full text searches](#).)
- ♦ To search using an Item's Custom field information, select the Item Category to display any Custom Fields enabled for that Item.

NOTE: For information regarding request assignment, reviewing a request, adding notes or updating the status, refer to [Working on a Request](#).

RSS Feeds

To easily access up to the minute details regarding Service Request activity within an RSS feed browser bookmark, Users can subscribe to RSS feeds by selecting the RSS button within the Service Request list. When the RSS button is selected, Users are presented with the application options for subscribing to receive the information and where the Recent Activity information is to be accessed. To readily access the information through a browser window, save the feed the to the Bookmark Bar.

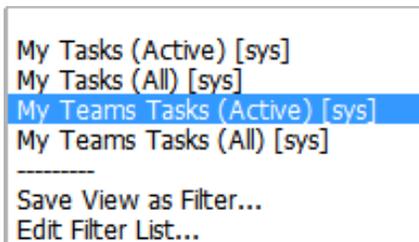
The following is an example of the information obtained by clicking on the RSS bookmark:



Queues for requests

The Queues functionality allows for requests, Incidents, Service Requests or Problems, to be assigned to the System User as part of a Team holding bay. Users within the Team with the Queue option enabled can select relevant requests they decide to work on, or manually assign the System User assigned requests to an appropriate User.

Requests that are assigned to the Queue are allocated to the System User, until they are manually reassigned to a specific User. The unassigned requests are located within the Home tab My Teams Queued Tasks, or the Operations>Incidents tab Filter option called Incident Queue for new Incidents, the Service Requests within the Service Request Queue in the Operations>Service Requests tab and the Operations>Problems tab Filter option called Problem Queue for new Problems .



When the Queue feature is enabled for the application, it can be applied on a Team by Team basis. This means some Teams can be configured to use the business logic of the application for assigning requests to specific Users. While other Teams can use the Queue to select the requests they want to work on, or allows other Users to manually assign the request to a relevant User.

When the Self Assign and Queue options are enabled for a Team and a request is created by a Technician User, the Self Assign option will override the Queue assignment and allocate the request to the User creating the request, if they are in the first layer of escalation. The User can assign the request to the Queue by selecting the System User in the Technician list.



Enabling the Queue

By default, the Queue functionality is disabled in the application Setup. To enable the Queue:

1. Log in as an Administrator
2. Select Setup>Privileges
3. Select the Request tab



4. Enable the Queues option
5. Click Save.

To enable the Queue for a Team:

1. Log in as a Supervisor
2. Select the User>Teams option
3. Select the relevant Team link

Team Information

Information Service Layers

Duplicate BYOD-Incident-Team

Details

Team Name

Process

Team Lead

Incoming Email

Email Display Name

Customer Notification

Technician Notification

Live Priority On Off

Self Assign On Off

Notify on New Technician Layer Team

Notify on Update Technician Layer Team

Notify on Escalate Technician Layer Team

Incident Queue On Off

Queue Visibility Entry States All States

Edit Assign Yes No

Close Assign Yes No

Location

Address

City

State

Zip

Country

Phone

Members

Technicians

Available Technicians

- Craig Wilson
- Kamal K
- Sankar R
- Vaibhav Jain

▶

◀

▶

◀

Selected Technicians

- Ingo Engels
- Joe K

Delete Cancel Save

4. Click Edit

5. Enable the Queue option

The following options can then be applied to the Queue:

Options	Description
Service Request /Incident/Problem Queue	<p>Allows the Team to use a holding bay for Incidents that are received via email or the Customer Portal. (This option is visible if it has been enabled by the Administrator.)</p> <p>If the Team has only one Technician assigned to Layer One of Escalation, new Incidents are automatically assigned to that Technician and that Technician is notified of the new Incident assignment.</p> <p>If the Team has multiple Technicians assigned to Layer One of Escalation, the new Incident is placed in the Queue (i.e., it is assigned to the System User) and all members of the Team are notified that a new Incident has been assigned to the Incident Queue. See: Queues.</p>
Queue Visibility	<p>When the Incident Queue is enabled, the option can be refined to allow the Queue to be available for assigned Workflow entry points, or all stages of the assigned Workflow. If All States is enabled, Users can move requests back to the Queue throughout the request lifecycle. See: Queues.</p>
Edit Assign	<p>When set to Yes and a request assigned to the System User (i.e., Queue) is opened in Edit Mode, the system will automatically assign the request to the User editing the request if they are in the Escalation Layer associated with the request.</p>
Close Assign	<p>When set to Yes and a request assigned to the System User (i.e., Queue) is moved to an Exit State of the Workflow, the system will automatically assign the request to the User who prompted the close action.</p>

6. Set the Queue Visibility

Select All States if Team members are to be allowed to return a request to the Queue regardless of the assigned Workflow State.

7. Set the Edit Assign option

Select Yes, if a request that is assigned to the System User/Queue is to be automatically assigned to a User in the first layer of escalation who opens the request in Edit mode.

8. Set the Close Assign option

Select Yes, if a request that is assigned to the System User/Queue is to be automatically assigned to the User who initiates an action that results in the request being moved to an Exit State.

9. Select Save.

Assigning requests from a Queue

All requests displayed within a Queue list are assigned to the System User. To reassign the request to an appropriate User:

1. Select the Request # hyperlink
2. Click Edit
3. Select an appropriate User from the Technician list

The request will now be assigned to the new User and removed from the Queue.



4. Click Save.

Reassign a request to the Queue

When the All States option has been enabled for the Queue within the Team Information screen, the System User will be retained in the Technician drop-down list for the first layer of escalation after it has been assigned to a User. This allows the assigned User to re-assign the request back to the Queue.

To reassign the request to the Queue/System User:

1. Select the Request # hyperlink
2. Click Edit
3. Select System User within the Technician drop-down list

The request should be at layer one of escalation within the assigned Team.

The request will now be assigned to the System User and returned to the Queue.



4. Click Save
5. Click Done.

The system returns to the request list view.

Queue Filter

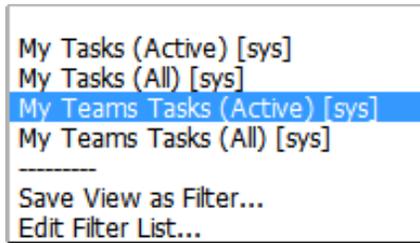
Teams that use the Queue method for request assignment can view and allocate requests using the My Teams Queued Tasks within the Home tab list filter, or within the Service Request, Incidents or Problems tab Queue list filter. They can also see Queued Tasks within the My Teams Tasks filters.

To view all types of requests assigned to the Queue within one list, use the My Teams Queued Tasks within the Home tab:

1. Select the Home tab

2. Go to the Filter List
3. Select the My Teams Queued Tasks option from the drop down list.

The screen will list all of the Service Requests, Incidents and Problems that are currently assigned to the System User.



To view the Queue within the Service Requests tab:

1. Select the Operations>Service Requests tab
2. Go to the Filter List
3. Select the Service Request Queue option from the drop down list.

The screen will list all of the Service Requests that are currently assigned to the System User.

To view the Queue within the Incidents tab:

1. Select the Operations>Incidents tab
2. Go to the Filter List
3. Select the Incident Queue option from the drop down list.

The screen will list all of the Incidents that are currently assigned to the System User.

To view the Queue within the Problems tab:

1. Select the Operations>Problems tab
2. Go to the Filter List
3. Select the Problem Queue option from the drop down list.

The screen will list all of the Problems that are currently assigned to the System User.

Customer Tab

- ◆ [“Create a Service Request for an existing Customer” on page 190](#)
- ◆ [“Create a Request for a new Customer” on page 191](#)
- ◆ [“Requests for Partner Organization Customers” on page 191](#)
- ◆ [“Supported Org Units Only option” on page 192](#)

The first step in creating a new Service Request requires that a Customer be assigned to the Request. There are two ways to assign a Customer to a Request, either search and select an existing Customer, or create a new Customer.

Create a Service Request for an existing Customer

To search and assign a Customer who already exists in the system:

1. Go to Operations>Service Requests
2. Click New

3. Search and select a Customer

Within the Find Customer field, enter any known Customer details or leave the search field blank to access the complete Customer List. If Custom Fields have been enabled in the Customer Information screen, the Advanced Search option can be used to search on data recorded within these fields.

Name	Phone	Org Unit
James Stewart		Micro Focus - Information Technology
Jason Blackett		Micro Focus - Information Technology

4. Click to search the Customer database

5. Select the relevant Customer Name hyperlink to assign the Customer details to the Request.

The screen will open the Find Item field.

See: [Advanced Search Options](#)

Create a Request for a new Customer

If the Customer does not exist within the system, an account can be created when entering the Request:

1. Select Operations>Service Requests

2. Click New

3. Within the Find Customer field, select New

An expanded editable Customer details form is displayed.

4. Enter the Customer details

5. Click Save

The form will revert to a non-editable screen of the newly entered details.

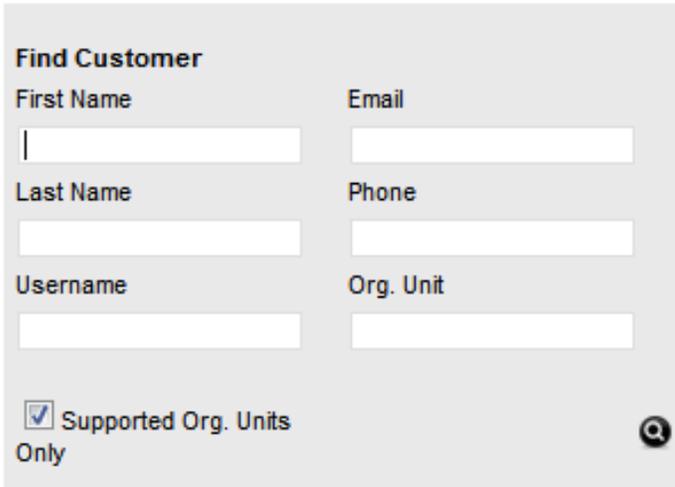
6. Click Next to assign an Item to the Request. Or select Quick Call if a Quick Call template is to be used.

Requests for Partner Organization Customers

NOTE: When a Request is created for a Customer of a Partner Organization it is automatically allocated to the Partner User associated with the Partner Organization.

Supported Org Units Only option

This option is visible within the Find Customer search field, if the logged in User has been assigned to support specific Organizational Units. Uncheck the option, if search results are to include Customers belonging to all Organizational Units recorded in the system.



Find Customer

First Name Email

Last Name Phone

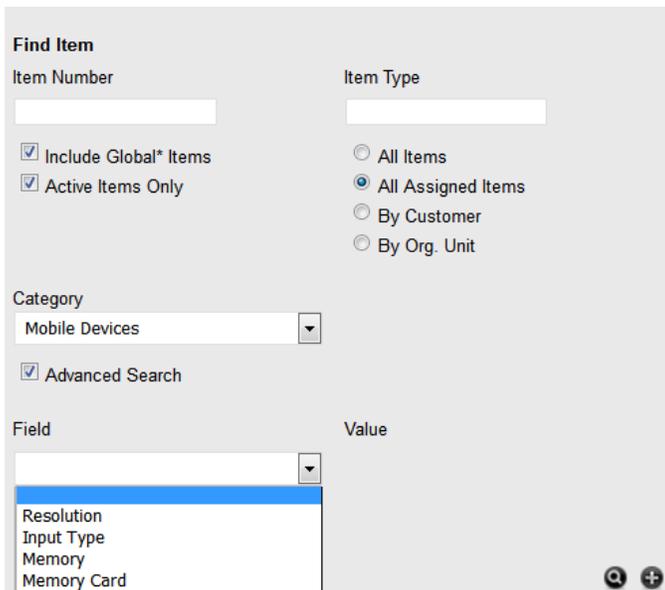
Username Org. Unit

Supported Org. Units Only

Advanced Search Option

To search for a Customer or an Item based on custom field information, use the Advanced Search option. The Advanced Search enables the User to search on Customer or Item custom fields, if they have been enabled.

During request creation the option Advanced Search will be visible within the Find Customer and Find Item screens.



Find Item

Item Number Item Type

Include Global* Items All Items

Active Items Only All Assigned Items

By Customer By Org. Unit

Category

Advanced Search

Field Value

Resolution
Input Type
Memory
Memory Card

To use the search option:

1. Tick the Advanced Search option

For the Find Customer, a custom field list will appear. For Find Item, an Item Category drop-down list is displayed.

2. For Find Item, select the Category. Two custom field lists appear
3. Select the custom field/s to search on

Find Item

Item Number

Item Type

Include Global* Items

Active Items Only

All Items

All Assigned Items

By Customer

By Org. Unit

Category

Mobile Devices

Advanced Search

Field Value

Memory Card

IMEI Number

4. In the Value field, enter the details to be searched
5. Click to return a list of Customers/Items based on the custom field value entered
6. Click the relevant Customer Name or Item number to assign it to the request.

Item Information

- ◆ [“Multi-Item Requests” on page 194](#)
- ◆ [“Request Item Assignment” on page 194](#)

After the Customer details are assigned to the Request, an Item or Items are assigned to the Request. This assignment associates all the relationships of the Item(s), including service level agreements and assigned support Team, to the Request.

If the Customer assigned to the Request owns any Items they will be listed below the Find Item search box. By default, the list is defined by the All Assigned Items option. It is also possible to search by:

- ◆ All Items
(Only visible if the Search All Items option is enabled within Admin>Setup>Privileges>User tab.)
- ◆ All Assigned Items (Customer and Organizational Unit)
- ◆ Assigned Items by Customer

- ◆ Assigned Items by Organizational Unit.

The screenshot shows the 'Request Information' interface with two tabs: 'Customer' and 'Details'. The 'Customer' tab is active, displaying the following information for James Stewart:

- Title
- Name: James Stewart
- Org. Unit: Micro Focus - Information Technology
- Room
- Email: james@nsd.com
- Phone
- Mobile
- Fax
- Pager
- Address 1
- Address 2
- City
- State
- Zip
- Country

The 'Details' tab is partially visible, showing a 'Find Item' section with the following options:

- Item Number: [Input field]
- Item Type: [Input field]
- Include Global* Items
- Active Items Only
- Item Type filters:
 - All Items
 - All Assigned Items
 - By Customer
 - By Org. Unit
- Category: Mobile Devices
- Advanced Search
- Field: Memory Card
- Value: [Input field]
- Field: IMEI Number
- Value: [Input field]

Below the search filters is a table of results:

Item #	Item Type	Identifier	Status
Service Desk	Service Desk		Available
Wifi Service	WIFI Service	Type:	Available

At the bottom of the results, it says '1 - 2 of 2 Results' and there is a 'Cancel' button.

The list can be filtered using the Include Global* Items option. This will display Items that are available to all Users in the system, as they have not been assigned to a specific Customer or Organizational Unit. It can also be filtered using the Active Items Only option, which means only Items that are assigned an active lifecycle state are displayed if the option is checked.

Multi-Item Requests

The system also allows for multiple Items to be assigned to a Request during the Request creation process, if relevant. This results in separate Requests being created for each Item assigned to the initial Request, which are then displayed within the Related Requests window within the Service Request Information screen.

The Requests are managed as individual Requests to cater for any special requirements relative to each Item. For example, consider a situation where a Team rolls-out an update in an organization. In this instance, during the Request creation process multiple Items are assigned to a single Request, which the system automatically allocates to separate Requests that are then managed on an individual basis. This allows appropriate Teams/ Technicians to be assigned to the Requests relative to their skill-set or departmental assignments. The implementation process more effectively differentiates between the tasks and Items being modified and ensures each Item has its own Audit Trail, Attachments and Notes for future reference.

Multi-Item Requests are listed as separate Requests within the Request List View, and can be accessed as a group with the Service Request Groups List View.

Request Item Assignment

To assign an Item to the Request:

1. Click the relevant Item link if listed below the Find Item search box

Or, [Search for an Item](#) or click to [Create an Item](#).

The option to create an Item is only available to Technicians if the system Administrator has enabled the Create Items option within the Setup>Privileges>User screen.

The screenshot shows a 'Request Information' form with two tabs: 'Customer' and 'Details'. The 'Customer' tab is active, displaying the following information:

Customer	
Title	
Name	James Stewart
Org. Unit	Micro Focus - Information Technology
Room	
Email	james@nsd.com
Phone	
Mobile	
Fax	
Pager	
Address 1	
Address 2	
City	
State	
Zip	
Country	

The 'Item' tab is also visible, displaying the following information:

Item	
Item Number	Wifi Service
Category	Service
Item Type	WIFI Service
Identifier Type:	
Team	Change Management Team
Room	
Service	Warranty

At the bottom of the form are three buttons: 'Cancel', 'Add', and 'Next'.

2. Click Next to move to the Details tab if only one Item is to be assigned to the Request
Or, select Add to assign additional Items. If Add is selected, a Request Selections window will be displayed that lists all the current Items assigned to the Request.

The screenshot shows a 'Selections' window with a table of items assigned to the request:

Customer	Item No.	Item Type
James Stewart	Wifi Service	WIFI Service

Below the table, it indicates '1 - 1 of 1 Results'.

3. Continue to add all the relevant Items to the Request and then select Next to move to the [Details tab](#).
Within the Details tab the Request is profiled by assigning a Classification and Description.

Creating an Item during request creation

To create a new Item for the Customer after they have been assigned to the request:

1. Move to the Find Item field

Find Item

Item Number

Item Type

Include Global* Items

Active Items Only

Category
Mobile Devices

Advanced Search

Field Value

Memory Card

IMEI Number

Click to open Item information screen

- Click **⊕** to add a new Item using the Find Item Type field
An expanded Item information screen appears, with the Item number field completed.

Item Information

Information Details Costs Requests Relationships Outages AMIE Snapshots

Number

Category
Type

Request Team

Incident Team

Problem Team

Change Team

Criticality

Service Level

Ownership

Customers Everybody

Org. Units All

Affects **13 Users**

Find Item Type (Name)

Find Customer (Last Name)

Find Org. Unit (Name)

- Enter the Item Type Name in the Find field, or leave empty and click **🔍**
- Select the Item Type hyperlink to assign the details to the new Item
- Enter other required information
- Click Next
The Item Details tab is displayed.

7. Enter any known Item details

8. Select Save.

The Item details are saved, select Next to complete the request creation process.

NOTE: This option is only available to Technicians if the system Administrator has enabled the Create Items option within the Setup>Privileges>User screen of the application.

Item Information

Item information allows the User to configure the basic information for the Item, most of which is pre-populated based on the Item Type selected for the Item. Within this screen the owners of the Item are also assigned.

To create an Item:

1. Select Configuration > Items

2. Click New

The Item Information screen appears.

The screenshot displays the 'Item Information' screen with the following elements:

- Navigation Tabs:** Information (selected), Details, Costs, Requests, Relationships, Outages, AMIE Snapshots.
- Form Fields:**
 - Number:
 - Category:
 - Type: (with a search icon)
 - Request Team: (dropdown)
 - Incident Team: (dropdown)
 - Problem Team: (dropdown)
 - Change Team: (dropdown)
 - Criticality: (dropdown)
 - Service Level: (dropdown)
- Ownership Section:**
 - Customers: (with search icon) - Value: Everybody
 - Org. Units: (with search icon) - Value: All
- Summary:** Affects 13 Users
- Buttons:** Cancel, Next

Item	Description
Item Number*	<p>If the Administrator has set the Item Numbers Editable option in Setup> Privileges> System to Yes, the User will have the option of entering a customized Item number. It may contain numbers and/or letters, and be between 1 and 64 characters in length.</p> <p>As no two Item Numbers can be the same, the User will be prompted to change the value they have entered if it is already in use. If the Item Number field is left blank, the system will automatically create an Item Number.</p> <p>If the Administrator has set the Item Numbers Editable option to No, an Item Number will be generated automatically and cannot be edited.</p>
Category*	This is auto-filled, based on the assigned Item Type.
Type*	This is the Item Type that the Item represents. Click the Search button to view the list of available Item Types.
Team*	This is the Technician Team that will be assigned to support the Item.
Status*	Select the status from the drop-down options displayed after the Item Type has been assigned.
Criticality*	Rates the degree of importance of an Item Type within an organization. The 'Impact' of a request is initially pulled from the Criticality of the Item, but can be adjusted within the request Information screen if required. Requests logged through the Customer Portal, use the Criticality of the Item to determine the Priority of the request. (See additional information below.)
Service Level	Select the Service Level Agreement from the drop-down list, if required.
Ownership	
Customers	<p>These are the Customers who own the Item. A single Customer, a group of Customers or all Customers in the application can be assigned to an Item.</p> <ol style="list-style-type: none"> 1. Enter a Customer last name, or leave blank then click the Search button to view a list of all available Customers. 2. Click on the hyperlink for the relevant Customer name or names to assign them to the Item. <p>If no specific Customer is allocated to the Item, it becomes a Global Item and is assigned to Everyone.</p>

Item	Description
Org Units	<p>These are the Org Units who own the Item. The Item can be assigned to one or multiple Organizational Units.</p> <p>To assign an Org Unit:</p> <ol style="list-style-type: none"> 1. Enter an Org Unit name, or leave blank then click the Search button to view a list of available Org Units. 2. Click on the hyperlink for the relevant Org Unit name or names to assign them to the Item. <p>NOTE: If Billing is enabled an owner must be assigned to the Item. The owner can be either a Customer or an Org Unit, but only Org Units that have a Primary Contact, will be displayed in the Org Unit Search list. (See: Primary Contact.)</p>
Notification	
Method	<p>This field is visible when an active Item moves into an offline State and allows the User to define who (Primary Contact or All Owners of the Item) and how (Email or SMS), Customers will be notified that the Item is not available.</p>

*Denotes mandatory fields

3. Search and select an Item Type
4. Select a support Team for each process
5. Select the Item's Status and Criticality
6. Assign a Service Level

If Contracts are enabled for the system, the assignment of an SLA will result in an annual service contract automatically being applied to the Item. If an SLA is not assigned, a Contract can be created for the Item within the Costs tab.

7. Search and select a Customer and/or an Organizational Unit owner
8. Click Next to view the Details tab.

Item Criticality

The Item Criticality is used to identify the degree of importance of an Item to an Organization.

When the Incident Priority is set to Derived in the Administrator Setup, the Impact of a request is mapped from the Criticality of the Item associated with the request and then combined with the selected Urgency, which derives the Priority of the request. If required, the Impact can be manually adjusted within the request Information screen. Requests logged through the Customer Portal, use the Criticality of the Item to determine the Priority of the request, which can be manually adjusted by the Technician User.

The following table displays the calculations applied by the system to the Item Criticality, which is mapped to a request's Impact to determine a request's Priority:

Impact / Urgency	Urgent	High	Moderate	Low	Very Low
Critical	1.000	0.850	0.700	0.550	0.410
High	0.850	0.723	0.595	0.468	0.349
Moderate	0.700	0.595	0.490	0.385	0.287
Low	0.550	0.468	0.385	0.303	0.226
Very Low	0.410	0.349	0.287	0.226	0.168

The above calculations result in the following Priorities:

Priority	Upper	Lower
Urgent	1	0.83
High	0.83	0.58
Medium	0.58	0.34
Low	0.34	0

The Incident Analyzer, if enabled by the Administrator in Setup>CMS>Incident Analyzer, can apply the Criticality to automatically detect Problems. The minimum Criticality level can also be used to determine the off-line Items that appear on Outages pages, if the Outages pages are enabled by the Administrator in Setup>Privileges>System.

Create an Item with Contracts Enabled

When Contracts are enabled with Billing, Items, Customers and Organizational Units can be linked together using a service contract. To automatically apply the system default support contract when creating an Item, simply select an SLA and an annual contract is applied. However, if an SLA is not required but a service contract is, the contract can be created within the Costs tab of the Item. See: [Costs Tab](#).

Details

Once the basic information for an Item has been completed, additional details can be defined for the Item. The Details tab displays a list of custom fields set for the Item's Category. The information to be completed within this section is configured by the Supervisor when customizing the Item Type templates in Configuration > Categories. Fields marked as Required, must be completed for the Item Details of the Item to be saved successfully.

For more information about Item custom fields, see: [Categories](#).

Clicking Save at the far bottom of the page after the Details tab has been completed, will create the Item and save it to the database.

NOTE: Items can be duplicated at any time by clicking the Duplicate button. A new Item is created with properties that are identical to the original Item (with the exception of the Item Number, as this must be unique and is generated automatically).

Item Description

Content entered in the Description field is made available on the Customer Portal in the expanded information window for an Item. For Service Items, where a description of the Service may be required within the Customer Portal, details about the Service can be completed within the Item Description field. The Item and Service information can be expanded by completing Item attribute fields that are marked as Customer Visible and therefore displayed in the Customer Portal.

To add an Item Description, within the Item's Details tab:

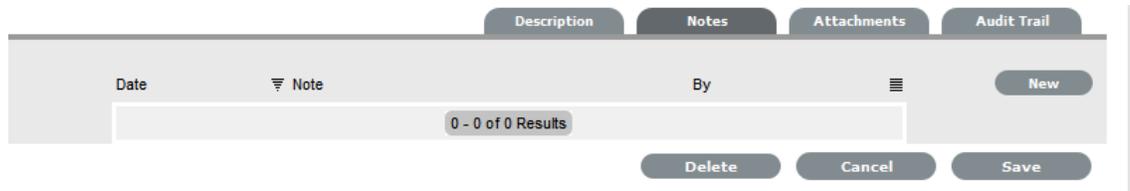
1. Click Edit
2. Move to the Description tab
3. Add information in the Description field

4. Click Save.

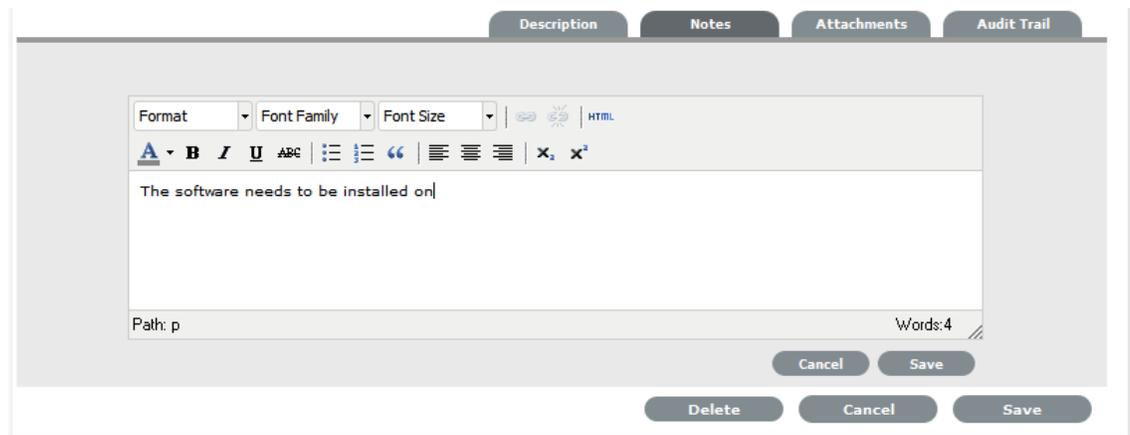
Item Notes

To add Notes to an Item, under the Item's Details tab:

1. Click Edit
2. Select the Notes tab



3. Click New
4. Enter details in the Notes field

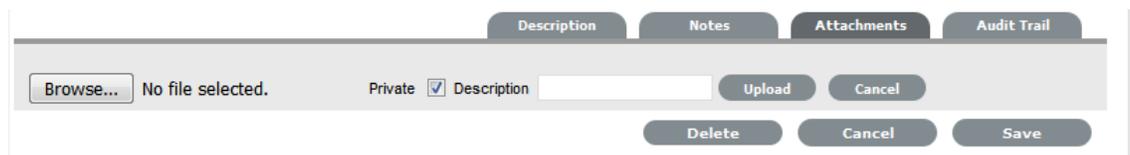


5. Click Save.
The Note will be allocated an identification number hyperlink for access. It will also be time and date-stamped.

Item Attachments

To add Attachments to an Item, within the Item's Details tab:

1. Click Edit to display the Attachment tab New button
2. Click New



3. Browse and select a file
4. Enter a Description, if required
5. Adjust Private and Public option, if relevant

Selecting Public will make it accessible on the Customer Portal, when the Item is in a Customer Visible state.

6. Click .

Item Outages

Planned outages can be created for an Item under the Outages tab. This is a period of time an Item will not be available for a Customer's use.

If an Item has an SLA with a specified Blackout Period, Outages should be planned to fall within this time. The Blackout Period is an agreement between the Customer and the Service Desk regarding a period of time when the Customer has no service expectations. This can also be the preferred time for Item upgrades and maintenance without affecting service availability.

When an Outage is being created, the Blackout Periods times are displayed to ensure the User creates a new Outage that does not breach the Item's SLA.

Creating an Outage

To create an Outage:

1. Select Configuration > Items
2. Select the Item Number
3. Go to the Details tab
4. Click Edit
5. Go to the Outages tab



6. Click New

The screenshot shows the 'Item Information' form with the 'Details' tab selected. The form contains the following fields and controls:

- Interval:** A dropdown menu set to 'One Time'.
- Start Date:** A date input field with a calendar icon.
- End Date:** A date input field with a calendar icon.
- Notification:** A dropdown menu set to 'None'.
- Offline Status:** A dropdown menu set to 'Offline'.
- Online Status:** A dropdown menu set to 'Deployed'.
- Reason:** A large, empty text area for providing details.
- Buttons:** 'Cancel' and 'Save' buttons are located at the bottom right of the form.

The screen will expand to display the Outage Editor screen including the Blackout Period, if defined for the Item associated SLA. Within the table the start and end time is displayed as Local Time and Actual Time:

- ◆ Local Time is based on the time zone of the logged in User
- ◆ Actual Time is based on the SLA time zone.

7. Define the Interval for the Outage

Select One Time if the Outage is a one off, or set regular outages based on a weekly or monthly basis.

8. Enter the Outage details

Select the Start/End Date within the calendar, and modify the Time accordingly inside the calendar pop-up.

9. Set the Notification method and recipients, for when the Outage is saved.

10. Tick the Reminder Email field, if a reminder is to be emailed to defined recipients prior to the Outage time

11. Define the length of time before the Outage occurs that the reminder is to be sent

The screenshot shows the notification settings section of the form:

- Notification:** A dropdown menu set to 'Email' and a text input field containing 'Primary Contacts'.
- Reminder:** A checked checkbox, a dropdown menu set to '24 hours', and the text 'before outage.'

12. Complete the Reason for the Outage

13. Click Save.

The Outage notification is sent to the defined recipients upon save.

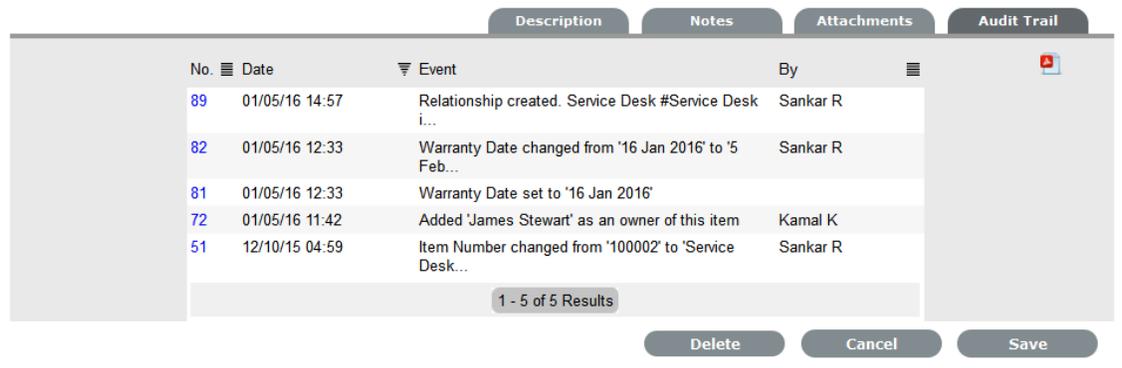
See [Outages](#) for more information on setting up and viewing Item Outages.

Item Audit Trail

The Audit Trail tab records all changes that are made to fields within the Item Information and Details screens. These entries are made to record all the alterations made to Items and the CMDB.

To view an audit trail entry, under the Item Details tab:

1. Select the Audit Trail tab
2. Click on the identification number hyperlink to display the entry details.



No.	Date	Event	By
89	01/05/16 14:57	Relationship created. Service Desk #Service Desk i...	Sankar R
82	01/05/16 12:33	Warranty Date changed from '16 Jan 2016' to '5 Feb...	Sankar R
81	01/05/16 12:33	Warranty Date set to '16 Jan 2016'	
72	01/05/16 11:42	Added 'James Stewart' as an owner of this item	Kamal K
51	12/10/15 04:59	Item Number changed from '100002' to 'Service Desk...	Sankar R

1 - 5 of 5 Results

Delete Cancel Save

Rollback Option

All changes recorded in the Audit Trail can be rolled back to reinstate information recorded against an Item.

To return to Item details to previously saved information:

1. Click Edit
2. Select the identification number hyperlink of the entry to be reversed
3. Click the Rollback button
4. Save the Item.

The Item details will revert to information recorded before an update was made.

Costs

For Users who are not assigned the Finance Role, the Costs Tab displays SLA Details and Item Availability information. Users who are assigned the Finance Role, also have access to the Item's financial and contractual details. The following Item Costs details include:

- ♦ Base cost
- ♦ Purchase date and related information
- ♦ Depreciation data
- ♦ Inherited costs
- ♦ SLA and Contract details
- ♦ Availability statistics.

Completing the Depreciate Over field causes the application to automatically keep track of the Item depreciation over the specified number of years. The current value of the Item after depreciation is displayed at Depreciated Value. The Audit Date field is used to record the date when the Item was last audited.

For Service Items see: [Service Item Costs Tab](#)

The Financial Costs and Inherited Costs fields allow the support organization to assign costs across related Items and charge Users and/or Organizational Units appropriately.

Financial	Description
Cost	The financial investment made to purchase the Item. This figure is also used when the Delegate Costs is enabled for allocating costs across related Items.
Monthly Cost	The amount invested on a monthly basis to maintain the running of an Item. This figure is also used when the Delegate Costs option is enabled for allocating costs across related Items.
Purchase Date	The date the Item was purchased.
Depreciate Over	Enter the number of years the Item is to be depreciated over, if required.
Depreciated Value	The system calculates the current value of the Item based on the Purchase Date and the number of years the Item is to be Depreciated Over.
Audit Date	Set the date the Item is next to be audited.
PO Number	If Purchase Orders are enabled for the system, the field is visible and automatically populated with the PO number generated by a User within the Finance>Purchase Orders tab, when the Item order was recorded in the system.
Inherited Costs	
Inherited Capital	Total infrastructure costs of parent CI's that directly contribute to the cost of the current CI. This figure is derived from all the Cost fields within the Item Information>Costs tab of related Parent Items.

Financial	Description
Inherited Ongoing	Running costs of all associated Items that enable the current CI to continue to function. This figure is derived from all the Monthly Cost fields within the Item Information>Costs tab of related Parent Items.
Delegate Costs	<p>To enable cost delegation across the relationship map allowing associated Items to inherit the costs of the current CI, select Yes. This will take the figures from the Cost and Monthly Cost fields for the Item and spread them across related Child Items.</p> <p>Define the technique to be used to evaluate the cost split:</p> <p><i>Child Count:</i> Costs are split by percentage based on the number of child CI's the costs are being delegated across.</p> <p><i>User Count:</i> Costs are split proportionally based on the number of users of the child CI's the costs are being delegated across.</p> <p><i>Custom %:</i> The relationship itself allows for the % cost to be assigned</p>

The figures displayed within the Availability fields are automatically calculated by the application, using the Item Lifecycle as it moves between online and offline States:

Availability

Avg Repair Time	Entries displayed here are automatically calculated based on the average length of time an Item is offline.
Avg Time To Fail	Figures displayed here are automatically calculated based on the average time between an Item being offline.

Billing Enabled

When Billing is enabled, a Service Level hyperlink is available within the Costs screen. This provides access to the Service Level Agreement details that govern the lifecycle for Requests logged against the Item.

Item Information

Information Details Costs Requests Relationships Outages AMIE Snapshots

Edit Duplicate Print Item # Wifi Service (WIFI Service)

Contract

Service Level [Warranty](#)

Contract # 9

Contract Type Subscription

Invoice # [100019](#)

Start Date 01/07/16

End Date 02/09/17

Expires 1 Year 28 Days

Warranty

Expires 02/03/16

Availability

Avg Repair Time N/A

Avg Time To Fail N/A

Contracts

Contract #	Type	SLA	Invoice #	Start Date	End Date
9	Per Item	Warranty	100019	01/07/16 12:09	02/09/17 23:59

1 - 1 of 1 Results

Done

If Invoices are also enabled, an Invoice Number hyperlink is available and when selected, will display the invoice details for the Contract that covers the Item. The Start Date and End Dates stipulate the contract length covered for the Item. It is summarized by the days or hours recorded in the Expires field.

The Contract tab within the Item Information Costs tab summarizes the contract details that cover the Item. Further Contract details can be found within the relevant Contract Number within the Finance>Invoices screen.

Create a Contract

Through the Item Costs tab, Contracts with an associated Invoice Number (if relevant) can be generated for an Item, after it has been logged in the system.

To add a Contract to an Item, within the Configuration>Item screen:

1. Select the Item Number
2. Move to the Costs tab

The Contracts tab is visible in the bottom right corner of the screen

3. Click Edit

The Add and Delete buttons are made available within the Contracts tab

Contracts

Contract #	Type	SLA	Start Date	End Date
0 - 0 of 0 Results				

Add Delete

Delete Cancel Save

4. Click Add

(If Invoices are enabled in the system, an Invoice number will be automatically generated and assigned to the Contract).

5. Select an SLA from the drop-down option

The screen will display the SLA details and the Contract Type locked to Per Item.

Priority	Response Time	Restoration Time	Resolution Time	24 x 7 support	Alert
Urgent	6 Hours	12 Hours	24 Hours	Yes	None
High	12 Hours	24 Hours	48 Hours	Yes	None
Medium	18 Hours	36 Hours	72 Hours	Yes	None
Low	24 Hours	48 Hours	96 Hours	Yes	None

6. Assign the Time period to be covered by the Contract:

If *Subscription* is selected, the Start and End Dates are automatically completed by the system, but can be edited if required.

If *Time Limited Subscription* is selected, the Support Hours field is displayed and the number of support hours purchased by the Customer should be entered. Also, the Start Date and End Date fields should be completed manually, entering the length of time for the subscription period.

If *Support Hours* is selected, the number of support hours purchased by the Customers should be entered.

If *Support Hours by Month* is selected, set the number of hours purchased per month and define which day of the month contract is to rollover to start the new month. The Total Support Hours will automatically be calculated based on the Start and End Dates set for the Contract.

(If a Contract is forward dated with a Start Date set in the future, the Pending Contract status is assigned. See [Pending Contracts](#).)

7. Add any relevant Invoice Notes
8. Check the Taxable box, if the Contract is to be taxed
9. Click Save.

If Invoices are enabled in the system, an Invoice number will be automatically generated for the Contract and made available within Finance>Invoices. Payment will need to be processed by a Finance User before the Contract can be enabled in the system. If invoice payment is required before the contract can be enabled in the system the following Warning message is displayed:



Warning

The invoice has been generated against this item with status "Pending Unpaid". Technicians will not be able to work with this item until the invoice has been paid.

10. Click Next

The Contracts information is only populated after the Invoice has been processed. To process the Invoice, as a Finance User move to the Finance>Invoices tab. Once the relevant Invoice payment has been processed the Contract details will be visible in the Costs >Contracts tab.

Item Information

Information Details Costs Requests Relationships Outages AMIE Snapshots

Edit Duplicate Print Item # srm-tst-nsd000c29485caa (Dell Latitude E6430)

Contract

Service Level [Warranty](#)

Contract # 7

Contract Type Subscription

Invoice # 100016

Start Date 01/05/16

End Date 01/05/17

Expires 1 Year 1 Day

Warranty

Expires

Availability

Avg Repair Time N/A

Avg Time To Fail N/A

Contracts

Contract #	Type	SLA	Invoice #	Start Date	End Date
7	Per Item	Warranty	100016	01/05/16 12:23	01/05/17 23:59
6	Per Item	Warranty	100013	01/05/16 12:19	01/05/16 12:19

1 - 2 of 2 Results

Done

Requests

This section lists all the requests that have been logged against an Item. For Technician Users, this tab is only visible to when the View All Requests option is enabled in the Setup>Privileges>User tab.

Use the system list filter to display the relevant type of request or task. To expand and view the request in full, select the Task # or Problem Report hyperlink.

Item Information													
Information		Details		Costs		Requests		Relationships		Outages		AMIE Snapshots	
Item #Wifi Service (WIFI Service)													
Incidents [sys] ▼													
Task #	Process	Date	Status	Technician	Problem Report								
100015	Incident	12/10/15 09:01	Closed - Resolved	Vaibhav Jain	Not able to get wifi access								
100014	Incident	12/10/15 05:53	Closed - Resolved	Kamal K	Not able to connect to Wifi								
100013	Incident	12/10/15 05:50	Closed - Resolved	Kamal K	Connect to Wifi								
100012	Incident	12/10/15 05:49	Pending	Kamal K	unable to connect to Wifi								
1 - 4 of 4 Results													
Done													

Item Relationships

This Relationship Tab allows Users to view and/or create a Relationship Map for the current Item, with other Items within the CMDB.

The Relationship direction can be defined as:

- ◆ Service Oriented - Parent-Child Relationship
- ◆ Component Oriented - Child-Parent Relationship.

Within each view the Relationship Class can be defined as:

- ◆ Hierarchical Relationship
- ◆ Connection - an association between the selected Items.

For a Service, such as the Email or Web Site Service, it is recommended that the Hardware be defined as the Parent for the Software Items and the Software be defined as the Parent of the Email or Web Site Service.

Create a Relationship

To create a new Item Relationship:

1. Select Configuration>Items
2. Select an Item
3. Select the Item's Relationship tab
4. Click Edit
5. Click New
6. Select the Relationship Direction and Class from the drop-down menus
7. Define the Relationship by selecting a description from the drop-down list

Item Information

Information Details Costs Requests Relationships Outages AMIE Snapshots

Print Item # Microfocus - Intranet (Website Services)

Direction Parent - Child

Type

Related Item

Hierarchical Connection

Item Number Item Type Org. Unit

Item #	Item Type	Identifier	Status
jdk-7u60-windows-x64	Windows Bundle		Installed
Wordweb7	Windows Bundle		Installed
Firefox 1.0	Windows Bundle		Installed

If the Relationship Type has the Inherit Parent Ownership option enabled, Child Items that use this relationship will inherit the Parent Item's owners. The ownership will not be editable and no other Parent Item can be assigned to the Child Item. A warning will be displayed if a relationship type has the Inherit Parent Ownership option enabled.

8. Use the Find Item field to locate the relevant Item
9. Click on the Item Number hyperlink to create the Relationship
10. Click Save to default to the Relationship Map view.

Relationship Map

Within the Relationships tab of the Item Information screen, a Relationship Map visually displays the connections that have been defined for an Item. All Item Relationships are listed in the Relationships Table beneath the Map. The Relationship Map can display up to 48 Child Items and 16 Parent Items in the one diagram.

The central icon of a Map is a visual representation of the selected Item. Scroll over an Item label to view any information recorded on the Information and Details tabs of the Item. To drill-down through the relationships, click on an Item label. To change the focus of the Relationship Map to another Item, click on the Item label and the system will request that OK be selected before updating the central node of the Map.

The Relationship Table data displayed at the base of the map can be filtered using the Direction filter view of Parent-Child or Child-Parent.

New Delete Print Item # Service Desk (Service Desk)

Direction: Child - Parent Display: 10

Current Item	Relationship	Related Item	Item #	Identifier	Category
Service Desk	is a child of	Windows Bundle	Microsoft 2010		Service

1 - 1 of 1 Results

The map displays the relationship between each Lifecycle State by using different colors to represent the type of Lifecycle State.

Color

- | | |
|---------------|---|
| Green Circle | CI is assigned an online status. |
| Red Square | CI is assigned an offline status. |
| Blue Triangle | Service CI is assigned a pre-production status. |
-

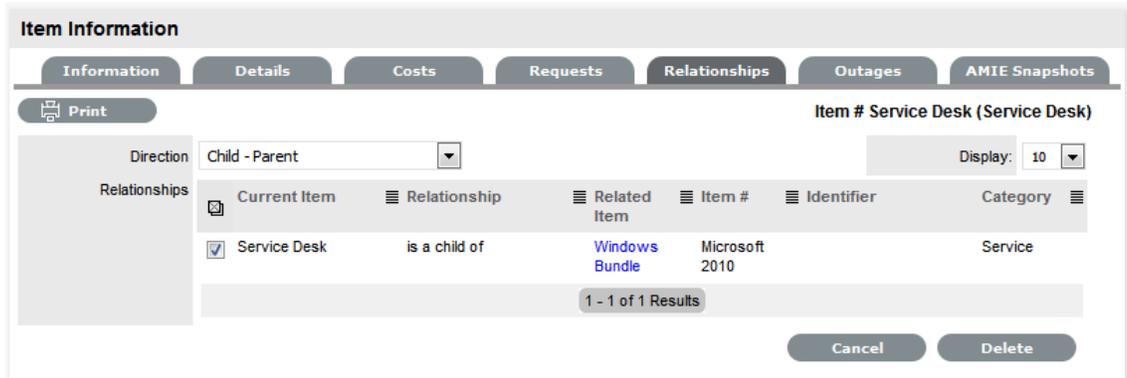
The Lifecycle State name can be accessed by scrolling over the Item icon within the Map.

To delete a Relationship:

To remove the Relationship between Items:

1. Select the relevant Item within the Configuration tab
2. Move to the Relationships tab
3. Click Edit
4. Select Delete

A table with the Relationship details is displayed.



5. Select the Relationship Direction to display the relevant Relationship table
6. Mark the checkbox next to the Relationship that is to be removed
7. Select Delete
8. Click Done to return to the Item list.

Users can view and create relationship maps for current Item with other Items within the CMDB within the Relationships tab to define the infrastructure that underpins Services within the Service Catalog. For more information about creating a Service catalog and relationship mapping, see: [Service catalog](#).

AMIE Item Imports and Relationships

Items with Item relationships that have been imported using the AMIE engine, retain the relationships that exist within the Asset Management Tool. A visible map of the relationships is recorded within the Relationships tab.

Quick Calls

- ♦ [“Quick Calls and Item Assignment” on page 215](#)

Quick Calls are used for common Requests that are logged using a template during the Request creation process.

If the Quick Call functionality is enabled for the system, after the Customer and, if relevant, Item details are assigned to a

Request, within the Details tab the Quick Call options are displayed below the dashed line in the Request Type drop-down list.

NOTE: Quick Call Templates also define the stage of the Workflow for the Request being created, which enables pre-approved Requests to be created in the system.

Quick Calls and Item Assignment

When creating a Quick Call, an Item can be assigned after the Customer information has been set or when the Quick Call template is applied to the Request.

If the Item is to be assigned to the Request using the Quick Call Template configuration, the User simply selects the Next button after assigning the Customer information to the Request. The application moves to the Details tab and within the Request Type options, the list displayed only includes Templates that have Items preset.

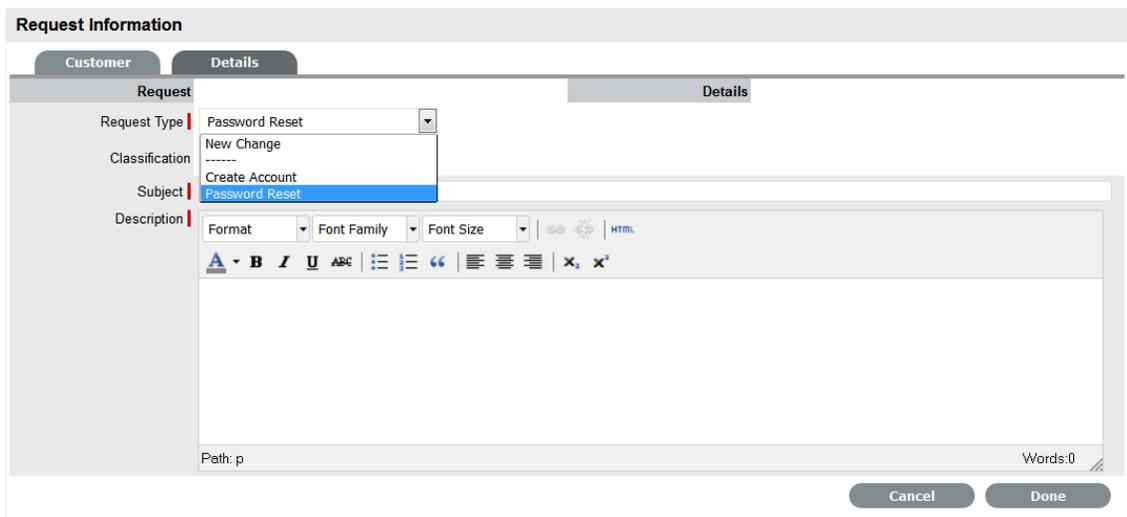
NOTE: The Next button will only be visible after the Customer has been assigned to the Request, if Quick Call templates that have Items assigned are configured in the system.

If a specific Item is associated with the Quick Call Request within the Customer tab, the options displayed within the Request Type drop-down list will include Quick Call templates associated with the Item Type already assigned to the Request, and templates assigned the Unknown Item.

For Requests created with multiple Items assigned that use different Items, Quick Call templates with no Items assigned are displayed. For Requests where the same Item is assigned on multiple occasions, Quick Call templates that have the matching Item and no Items assigned are made available in the Request Type drop-down list.

To create a Request using a Quick Call:

1. After allocating a Customer and Item(s), click Next to move to the Details tab



The screenshot shows the 'Request Information' form with the 'Details' tab selected. The 'Request' section has a 'Request Type' dropdown menu open, displaying a list of options: 'Password Reset', 'New Change', a dashed line '-----', 'Create Account', and another 'Password Reset' option. Below the dropdown, the 'Classification' field is empty, and the 'Subject' field contains 'Password Reset'. The 'Description' field is empty and features a rich text editor toolbar with options for Format, Font Family, Font Size, and various text formatting icons. At the bottom of the form, the 'Path' field contains the letter 'p' and the 'Words' count is 0. 'Cancel' and 'Done' buttons are visible at the bottom right.

2. Within the Request Type drop-down list, select the relevant Quick Call template displayed below the dashed line
 3. Assign the Classification
- The list displayed will be based on the Item assigned to the Request.

4. Click Done.

All Request details will be populated according to the Quick Call template. Any amendments can be made through the Request Summary screen.

NOTE: When saved, the Request created using the Quick Call template can be duplicated, to minimise data entry requirements for multiple similar Requests.

Contract Tab

When Contracts are enabled for the system, the Contract tab is visible within the Service Request Information screen.

The Contract tab of a Request includes the details of the Contract Type and SLA assigned to the Request. If a valid contract is active for the Customer, Item or Organizational Unit assigned to the Request, then the details of the contract will be displayed. If an SLA is not assigned to the Customer, Item or Org Unit and the Billing functionality is not enabled, the system automatically applies a default SLA based on the Item Type or the system default SLA.

Priority	Response Time	Restoration Time	Resolution Time	24 x 7 support	Alert
Urgent	6 Hours	12 Hours	24 Hours	Yes	None
High	12 Hours	24 Hours	48 Hours	Yes	None
Medium	18 Hours	36 Hours	72 Hours	Yes	None
Low	24 Hours	48 Hours	96 Hours	Yes	None

When Billing is enabled and the Contracts or Invoices functionality is active, the system verifies the service entitlement status of the Customer assigned to the Request, and if a valid contract is not in place, the Request is assigned a status of Pending-No Contract and locked until a valid contract is associated with the Request. The Customer is automatically sent the NoContractCreateRequestSummary email when the Request is saved with this Status.

Item Information

Information Details Costs Requests Relationships Outages AMIE Snapshots

Duplicate Print Item # 10000101 (Iphone 6)

Contract

Service Level [SLA](#)

Contract # 16 

Contract Type Subscription

Invoice # [100039](#)

Start Date 01/12/16

End Date 01/24/16

Expires 11 Days

Pending Contract # 17



A reminder email can be sent to the assigned Customer by the Technician from within the Summary tab by clicking .

For more detailed information about contracts and billing, see [Contracts](#).

Details Tab

- ◆ [“Entering a Request Description” on page 217](#)
- ◆ [“Request Subject” on page 218](#)

To successfully create a Service Request, the Request must be profiled by completing the Request Type, Classification and Description details. Within the Details tab there is also the option to select any relevant Quick Call Templates that have been configured for the Item Type assigned to the Request.

Entering a Request Description

To profile the Request:

1. Define the Request Type

The New Service Request option is locked in if there are no Quick Call templates available for the Item or Process.

2. Select a Classification

If multiple Items are assigned to the Request, the option to assign a specific Classification for each Item Request is provided.

3. Complete any required customized fields

4. Define the Subject content, if desired or required

(The Subject field can be set as a required field by the Administrator in the Setup>Privileges>User tab.)

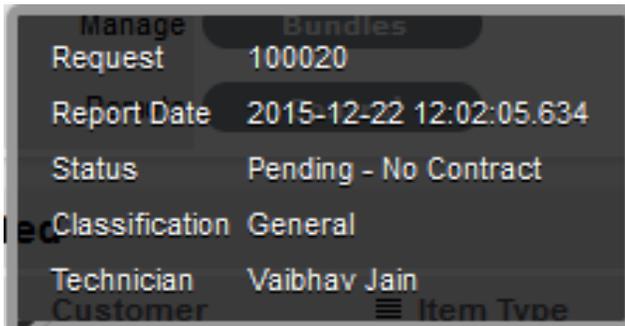
5. Enter all relevant information within the Description field
This is a mandatory field.

6. Click Done to enter the new Request into the database.

When a Request is submitted successfully, the Request [Summary Tab](#) is displayed. If the Force Analysis functionality is enabled in the application's Setup, the system will move to the [Analysis tab](#).

Request Subject

It is recommended that a summary be included in the Subject field, as the details recorded in the Subject field are displayed in scroll-over summaries throughout the application. For example, when a new Request is being entered for a Customer, a Recent Customer Requests list is displayed during the Request creation process for all Items the Customer owns either directly or via shared ownership. The Requests list includes a scroll-over summary where Subject content is displayed, if the Subject is completed for a Request. Subject information can also be included within a column in the List View, for a quick glance summary of a Request.



NOTE: The system Administrator can make the Subject field mandatory by enabling the Subject Required option in the Setup>Privileges>User tab.

Analysis Tab

- ◆ [“Analysis Tab during Request Creation” on page 219](#)
- ◆ [“Proactive Solution Analysis” on page 220](#)
- ◆ [“Analysis” on page 220](#)
- ◆ [“Searching for a Solution” on page 222](#)

- ◆ “Proactive Analysis during Request Creation” on page 223
- ◆ “Converting a Service Request to an Incident” on page 224
- ◆ “Linking Service Requests” on page 224
- ◆ “Creating an Incident, Problem or Change Request within a Service Request” on page 224
- ◆ “Creating an Alert” on page 224
- ◆ “Article Button” on page 225
- ◆ “Remove Button” on page 226
- ◆ “Solution Article” on page 226
- ◆ “Creating a Solution Article” on page 227
- ◆ “Requests Tab” on page 228
- ◆ “Closing Requests within Groups” on page 228
- ◆ “Status” on page 230
- ◆ “Updating a Service Request's Workflow and Status” on page 230
- ◆ “Requests with a Pending-No Contract Status” on page 231
- ◆ “Viewing a Status Note” on page 231
- ◆ “Service Request Reminders” on page 231
- ◆ “SLA Triggers and Request Status” on page 232
- ◆ “Priority” on page 232
- ◆ “Setting Request Priority” on page 233
- ◆ “Request Assignment and Escalation” on page 233
- ◆ “Request Assignment” on page 234
- ◆ “Automated Escalation” on page 234
- ◆ “Manual Escalation” on page 234
- ◆ “Escalation Control” on page 235
- ◆ “Notification” on page 235
- ◆ “Workflow” on page 237
- ◆ “Moving through the Workflow” on page 237
- ◆ “Approval State” on page 237
- ◆ “Assigning a State with an Underpinning Contract” on page 238
- ◆ “OLA Status Due” on page 238
- ◆ “Team Assignment during the Workflow Lifecycle” on page 239
- ◆ “Pending - No Contract Status” on page 239

Analysis Tab during Request Creation

When the Force Analysis option is enabled by the Administrator, the Analysis tab is automatically displayed after the Description is entered during the Request creation process. Within this tab the User can:

- ◆ Convert a Service Request to an Incident
- ◆ Create or search for a Solution
- ◆ Create or apply a Workaround
- ◆ Link the Request to other requests prior to saving the Request.

(This option is not available to Incidents created with Multiple Items assigned during the Incident creation process.)

- ◆ Create an Alert related to the Request.

NOTE: To include analysis during Request creation, ensure the Administrator>Setup>Privileges>Requests>Force Analysis option is set to Yes.

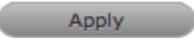
The screenshot shows the 'Service Request Information' interface for 'Service Request # 100034'. The 'Analysis' tab is active. A dropdown menu for 'Proposed Solutions' is open, listing various actions. The main content area is a table with columns 'Primary', 'Type', and 'Relevance'. A status bar indicates '0 - 0 of 0 Results'. A 'Done' button is located at the bottom right of the table area.

NOTE: If analysis is not required during the request creation process, click Done to continue to the Summary tab.

Proactive Solution Analysis

During Request creation after the Description is completed, the system automatically searches the Knowledge Base for possible Solutions that may be related to the Request. This search is based on the Item Type, Classification and text matching of existing Articles with the Incident Description content. Proposed Solutions will be visible when the Proposed Solution filter is selected within the Analysis tab.

To assign a proposed Solution to a Request:

1. Select the Article ID number
2. Click  to assign the Solution or select Cancel to revert to the Proposed Solution list.

If the Resolved option is selected, the Request is automatically closed and the selected Article is assigned as the Solution.

Analysis

Within the Service Request Analysis tab other requests can be created, similar Service Requests can be viewed and the current Service Request can be related to other requests. It also allows the User to convert a Service Request to an Incident.

To assign a Solution to a Service Request, the User can apply Proposed Solutions presented by the application or use the Search Solution facility. If a Solution Article does not exist, a Service Request solution can be created within this screen. Once a Solution is applied to the Service Request, the application automatically closes the Request.

The options with the Service Request Analysis tab include:

Analysis Tab Drop-down Options

Proposed Solution	Displays a list of all solutions with a search based on Request Description, Item Type and Classification. To assign a Solution, select the Solution ID number to display the solution in full. Click Resolve if the Solution is relevant. This will close the Request and update the Customer.
Search Solution	Allows User to enter full text or ID number to search for possible Solution Articles. To assign a Solution, select the Solution ID number to display the Solution in full. Click Resolve if the Solution is relevant. This will close the Request and update the Customer.
New Solution	Displays Knowledge Base editor to allow the User to enter a new Solution. Solution Articles are used as Proposed Solutions for future Requests. See: Solution Article .
New Incident	Creates a new Incident and automatically links the Request to the Incident. The Request status will move to 'On Hold - Process Escalated'.
Convert to Incident	Allows the User to make the current Request an Incident and maintain the current identification number for Customer correspondence purpose, while recording the action in the Audit Trail.
Link Incident	Allows the User to enter full text or ID number to search on Incidents. Select a No. link to immediately link the current Request to Incidents.
Similar Service Requests	Displays similar Requests based on Item Category, Classification and Description.
New Problem	Creates a new Problem and automatically links the Request to the Problem.
Link Problem	Allows the User to enter full text or ID number to search on Problems. Select a Problem ID number to immediately link the current Request to other Problems. The Request status will move to 'On Hold - Process Escalated'.
New Change Request	Creates a new RFC and automatically links the Request to the RFC. The Request status will move to 'On Hold - Process Escalated'.
Link Change Request	Allows the User to enter full text or ID number to search on Change Requests. Select a Change Request ID number to immediately link the current Request with other Change Requests.
Alerts	Allows the User to create an Alert directly related to the Request. Displays any reminder alerts that have been created in the Summary tab of the Request. Select the Alerts option to view Alerts list, and click on an Alert Publish Date to view Alert Content.

Searching for a Solution

To Search for a Solution:

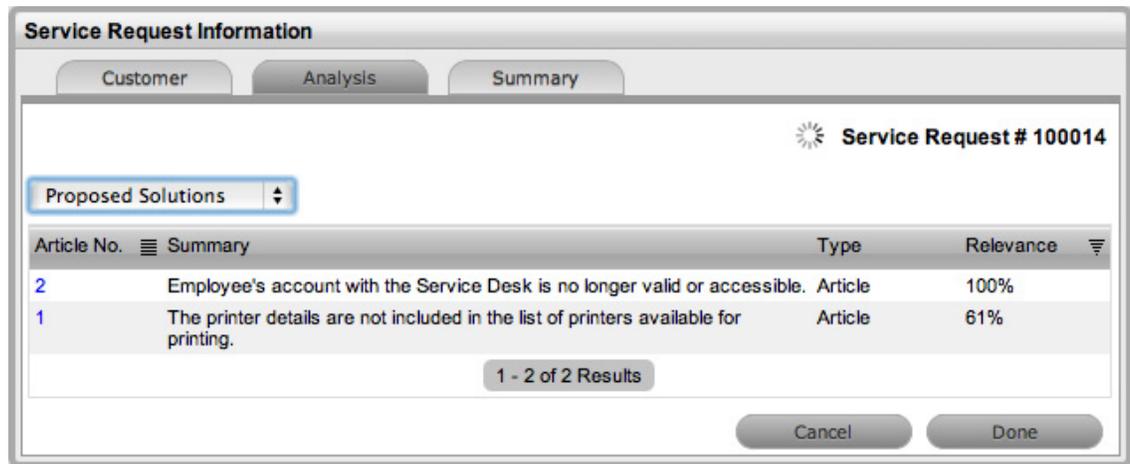
1. Click on the number of the required Request

The Request Information screen appears.

2. Select the Analysis tab

3. Click Edit

The drop-down list will become active.



4. Select from the available options, as follows:

Analysis Tab Drop-down Options

Proposed Solution	Displays a list of all solutions with a search based on Request Description, Item Type and Classification. To assign a Solution, select the Solution ID number to display the solution in full. Click Resolve if the Solution is relevant. This will close the Request and update the Customer.
Search Solution	Allows User to enter full text or ID number to search for possible Solution Articles. To assign a Solution, select the Solution ID number to display the Solution in full. Click Resolve if the Solution is relevant. This will close the Request and update the Customer.
New Solution	Displays Knowledge Base editor to allow the User to enter a new Solution. Solution Articles are used as Proposed Solutions for future Requests. See: Solution Article .
Alerts	Shows details of the Alerts that have been created within the Incident.

5. Click Save.

Proactive Analysis during Request Creation

During Request creation after the Request Description is completed, the system automatically searches the Knowledge Base for possible Solutions that may be related to the Request. This search is based on the Item Type, Classification and text matching of existing Articles with the Request Description content. Proposed Solutions are visible when the Proposed Solutions filter is selected within the Analysis tab.

To assign a proposed Solution to a Request:

1. Select the Article ID number

The system will display the Solution details screen.

The screenshot displays the 'Analysis' tab for Service Request # 100014. The interface includes tabs for 'Customer', 'Analysis', and 'Summary'. A top bar contains an 'Edit' button and the service request number. The main content area is divided into sections: 'Flags' (ID 2, Type Article, Visibility Technicians & Customers, Status Published, Item Category Service, Classification New User, Review Date), 'Item Types' (Service Desk), and 'Content' (Title: Need to log requests but do not have Service Desk Account; Summary: Employee's account with the Service Desk is no longer valid or accessible.; Content: Please email the employee details to john@servicesupport.com and an account will be created or re-enabled.). Below the content are 'Created' (08/01/11 13:35) and 'Revised' (08/03/11 12:15) timestamps, and a 'Direct Link' to the article. A 'Statistics' section shows 'Views:0 Last: Votes: Rating:'. At the bottom, there are tabs for 'Related', 'Attachments', and 'History', a search bar with '0 - 0 of 0 Results', and 'Apply' and 'Cancel' buttons. A red arrow points from the 'Apply' button to the 'Direct Link' text.

2. Select the Apply button.

The Service Request is automatically closed when a Proposed Solution is applied.

Converting a Service Request to an Incident

Service Requests are logged against Service Items and can be converted to Incidents within the Analysis tab. This action results in the Incident maintaining the same request identification number and audit trail that records the conversion.

To convert a Service Request to an Incident:

1. Select Edit within the Analysis tab
2. Select the Convert to Incident option.

The Service Request ID # is associated with a new Incident and the Incident is assigned the Entry State of a relevant Incident Workflow. The audit trail of the Incident records the conversion time and date. The customer is not notified about the Process amendment.

Linking Service Requests

Within the Analysis tab, Service Requests can be linked to other Service Requests, Incidents, Problems and RFCs.

To link a Service Request to a Group:

1. Select Edit within the Analysis tab
2. Search for a Request Group using the full text or ID option
3. Select the relevant search result ID number.

This automatically adds the current Request with the existing group.

Creating an Incident, Problem or Change Request within a Service Request

A Service Request can prompt the creation of an Incident, Problem or RFC and this can be achieved within the Analysis tab. This will move the Service Request status to On Hold - Process Escalated, and link it to the new Incident, Problem or Change Request group.

To escalate a Service Request to another Process:

1. Select Edit within the Analysis tab
2. Select the New Incident, New Problem or New Change Request option.

The Service Request is automatically escalated and its status changed to On Hold - Process Escalated.

NOTE: When the related Incident, Problem or Change is moved to an Exit State, the Service Request is automatically moved to the default Exit State, if not already closed.

Creating an Alert

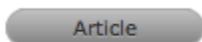
Within the Analysis tab, an Alert that is associated with the Request can be created by:

1. Select Edit within the Analysis tab
2. Select the Alerts option in the drop-down list
The New button is made accessible.
3. Click New
4. Refine the content for each required field:

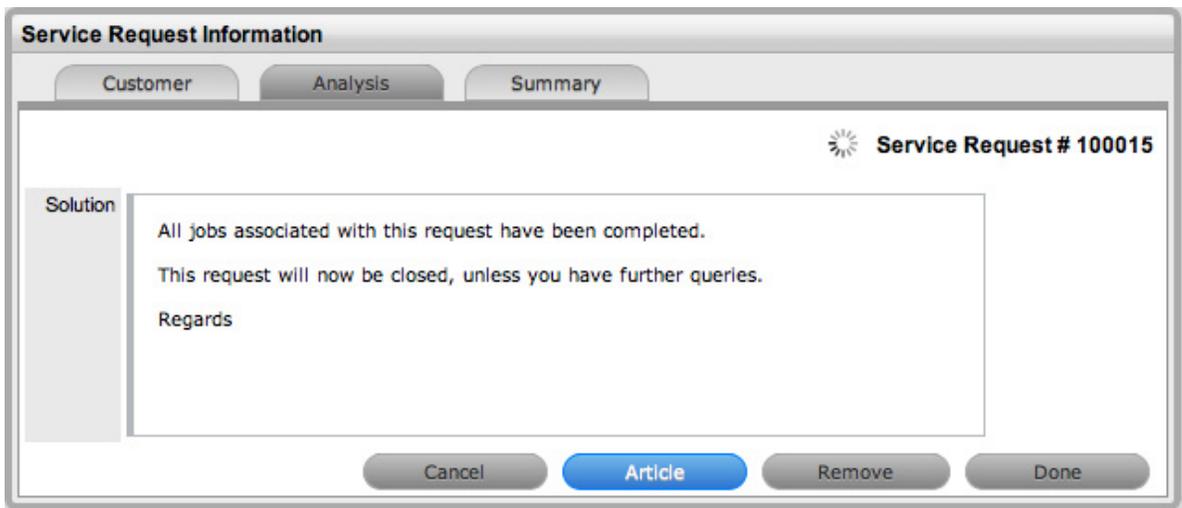
Alert Details	Description
Created	The current date and time.
Publish	The date the Alert is published. Use the calendar icon to the right of the field, to select a Publish date. Set to a date in the future, or use the default to publish the Alert immediately.
Dismiss	The date the Alert ceases to be available. Use the calendar icon to the right of the field, to select a Publish date. On this date, the Alert will disappear from a User's Alert list.
Severity	The type of Alert to be published. The choices are: <ul style="list-style-type: none"> ◆ Information – for general Alerts ◆ Warning – to warn Users of potential issues ◆ Urgent – to publish an urgent actionable message. <p>The icon appearing with the message will depend on the type of Alert.</p>
User	The type of Users to receive the Alert, which include: <ul style="list-style-type: none"> ◆ Specific Customer or User ◆ User Role ◆ Personal Alert ◆ Organizational Units ◆ Public. <p>In the Find User or Customer list, click search to select the recipient from the drop-down list.</p> <p>An Alert sent to a User Role will go to all Users with that Role.</p> <p>A personal Alert appears on the User's own screen at the Publish date.</p> <p>A Public Alert appears when the Public Alert link is selected on the Login Page.</p>
Title	Enter the title of the Alert.
Message	Enter the main content of the Alert.

5. Click Save.

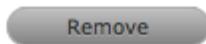
Article Button



When a Solution has been applied or proposed for a request with the Create Knowledge option set to No, the Solution is visible within the Analysis tab and not available within the Knowledge Base. To manually escalate a request Solution to a Knowledge Base Solution Article, with the Analysis tab in Edit mode, select the Article tab.



Remove Button



When a Solution has been applied or proposed for a request, the Solution or Knowledge Base Solution Article is visible within the Analysis tab. To disassociate a Solution from a request, with the Analysis tab in Edit mode, click the Remove button. The Analysis tab will now only display the default drop-down list options.

Solution Article

Solution Articles are Knowledge Base Articles generated as fixes for Incidents and Service Requests made available within the Analysis tab of requests. For similar requests that are logged in the future, they can be used as Proposed Solutions.

The Solution options available within the Analysis tab of a request include:

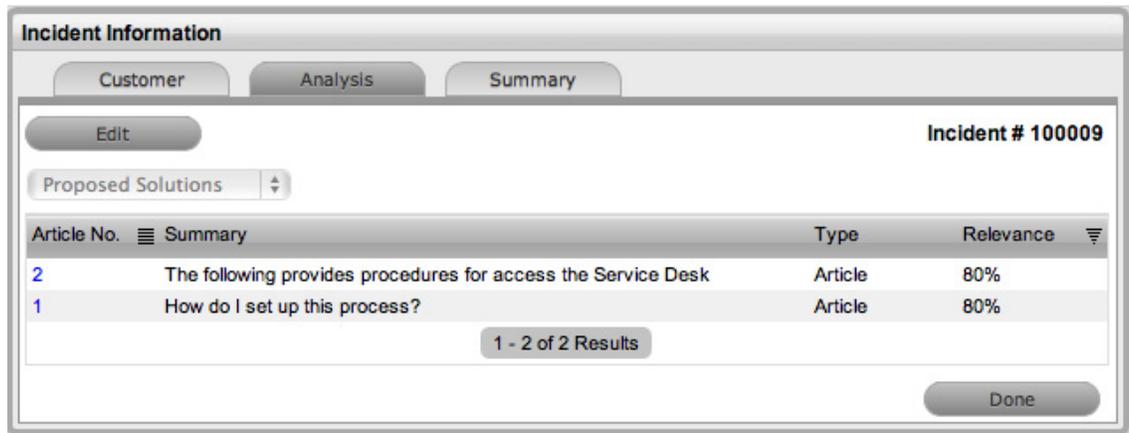
Analysis Tab Options

Proposed Solution	Displays a list of all Solutions with a search based on the Problem Description, Item Type and Classification. To assign a Solution, select the Solution ID number to display the Solution in full. Click Resolve if the Solution is relevant. This will close the Problem and notify the Customer.
Search Solution	Allows User to enter full text or ID number to search for possible Solution Articles. To assign a Solution, select the Solution ID number to display the Solution in full. Click Resolve if the Solution is relevant. This will close the Problem and notify the Customer.
New Solution	Displays Knowledge Base editor to allow User to enter a new Solution. Define visibility, enter a Summary, a Description and Save.

Creating a Solution Article

Within a request:

1. Select the Analysis tab



2. Click Edit
3. Select New Solution in the drop-down list options

The screen defaults to the expanded Solution Article editor with the Visibility and Status locked down.

Visibility Options	Description
Assigned Request	The default visibility. This means that the solution is only visible relative to the request through which it was created.
Users	Visible by internal Users only (i.e., not Customers).
Users & Customers	Visible to internal Users and Customers logged into the application.
Everyone	Available publicly, without logging into the system.

4. Enter a Review Date or leave blank for the field to be automatically populated when saved
The Item Category, Classification and Item Type are all drawn from the related request.
5. Edit the Problem content if required

Incident Information

Customer Contract Analysis Summary Notes [1] Attachments Impact Audit Trail

Incident # 100012

Flags
 ID 20
 Type Article
 Visibility: Everyone
 Status: In Development
 Item Category: BYOD Devices
 Classification: General

Please select at least one Item Type or Item.

Item Types
 Iphone 6

Items

Details
 Custom 1
 Custom 2
 Custom 3

Content
 Title: KB Article

Summary
 Format Font Family Font Size
 KB Article
 Path: p Words:2

Content
 Format Font Family Font Size
 KB Article
 Path: p Words:2

Created 01/05/16 16:05
 Revised 01/05/16 16:06

6. Enter the Solution content
7. Upload an relevant attachments within the Attachments tab
8. Click Save.

Requests Tab

Solution Articles generated from requests include a Requests tab. This tab enables the User to view details of the request related to the Article. For detailed information about Knowledge Base Articles see: [Articles](#).

Closing Requests within Groups

Requests within the Related sidebar can be closed individually by moving the Workflow State to a Exit (Closed) State within the Information Summary tab Screen. Grouped Requests can also be closed as a group, by changing the Request Status to a Exit (Closed) State as part of a Bulk update. (See Bulk Updates above.)

Editing Multiple Requests

Customer Contract Analysis Summary

Details

Priority: Medium

Impact: Moderate

Urgency: Moderate

Workflow: Incident Workflow

Status: [Dropdown]

Team: [Dropdown]

Notification

Customer: [Dropdown]

Customer CCs: [Dropdown]

Technician: [Dropdown]

Technician CCs: [Dropdown]

Classifications

Account Details: [Dropdown]

Item

Vamsi Krishna (100026)

Electrical Engg

Alternatively, all Requests can be closed by using the Solution button within the Notes tab of a Request. This option is available if the Handshaking facility has not been enabled for the system, within the Administrator>Setup>Privileges>Requests tab.

To close related Requests using this method:

1. Go to Operations>Requests

Or, within Operations>Request Groups select the Group Number and move to the Elements tab.

2. Select the Request # hyperlink of a Request in the relevant Group
3. Click



4. Enter the Note details of the Solution

The Visibility option must be set to Public to access the Solution or Propose button.

5. Check the Apply to Group option

If relevant, add Note Time across the Group.

Group Options Apply to Group

Add Note Time to Group

Create Knowledge Yes No

6. If relevant, enable Create Knowledge

This will move the content of the Note field to a Solution Knowledge Base Article with the Visibility of Assigned Request.

7. Click **Solution**

The related Requests are automatically closed and the Note content is also made available in the Knowledge Base if the Create Knowledge was enabled.

Status

Service Request Workflows are a combination of any number of stages or States that cover the lifecycle of a Request for a Service Category Item. A Supervisor creates new Workflow States for the default Service Request Workflow or builds new Workflows in the Service >Workflows tab. See [Workflows](#) for more information.

Within the Service Request Information Summary tab, the assigned stage of the Workflow is displayed within the Status field, with the Next Action field displaying the options of where the Request can move to. To view an assigned Workflow in its entirety select , and scroll over the State fields within the map to view State details.

The system provides the following States for the Service Request Workflow:

Status	Description
SLA Timers On	
Open	The Request is open. Request timers are running and the automated SLA triggers fire when appropriate.
Pending	Work on the Request has not commenced. The Response-time SLA trigger will fire for Requests with this status.
SLA Timers Off	
On Hold - Pending Approval*	When the Request is manually moved to this State, SLA triggers will not fire for the Request.
On Hold - Process Escalated*	A Request moves into this state when a related Request has been created within the Analysis Tab of the Request. The timer stops and there are no future States as the request will be closed when the related Request is closed.
Pending- No Contract*	Request has been created without a Contract. The Contract must be processed before work on the Request can commence .
Closed (Verified)- CAB	Request has been resolved and verified by the CAB.
Closed Resolved	The issue has been resolved and the Request has been closed. SLA triggers will not fire for Requests with this status.
Cancelled	The Request has been cancelled. SLA triggers will not fire for Requests with this status.
Cancelled- Unpaid*	The contract for a Request has not been paid. The Request is cancelled.

*Denote System States that cannot be deleted but can be renamed.

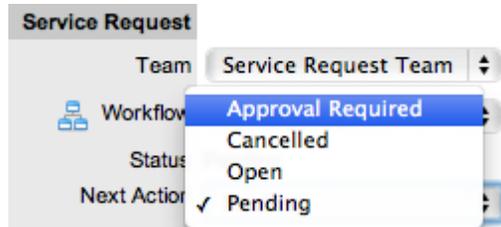
Updating a Service Request's Workflow and Status

The list of available Workflows is derived from the associated SLA. To manually change a Request's Workflow or Status:

1. Select Operations > Service Requests
2. Select a Request #

3. Click Edit
4. Within the Workflow list, modify the Workflow as required.
5. From the Next Action drop-down list select the Request's next Status.

The States listed in Next Action are based on the Service Request Workflow selected. To view the complete Workflow lifecycle click .



6. Click Save.

The system can automatically move a Request into another State through the following actions:

- ◆ Using the Handshaking feature when a Note is added
- ◆ Closing an Incident when adding a Note using the Solution button
- ◆ Escalating a Request to an Incident, Problem or Change Request
- ◆ When Billing is enabled and payment is not received.

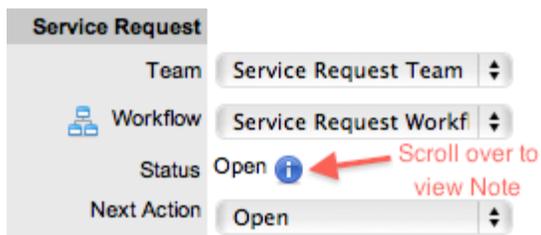
Requests with a Pending-No Contract Status

Requests logged with the system that do not have a valid Contract are assigned the Pending - No Contract status. These Requests are locked until a valid Contract is applied, and if relevant, paid.

Viewing a Status Note

As Requests move into a State with a Status Note, a Note icon is displayed beside the Status field within the Summary tab of the Request. Scroll over , to view the contents of the Status Note. If the Status Note includes an attachment, click the attachment name link in the pop-up window to

download it. Click  to close the window.



Service Request Reminders

When Requests move into a Customer, Line Manager or Team Manager Approval State, Technicians who are part of the Request Team have access to the Send a Reminder option. Clicking  emails a reminder email to the Manager and records the action in the Request's Audit tab. (The message is customized by the Administrator in the Setup>Email>Templates, Approve Service Request link.)

Service Request	
Team	Service Request Team
 Workflow	Service Request Workflow
Status	Approval Required 

SLA Triggers and Request Status

SLA Triggers fire for Requests that are in a Workflow State that has the Service Timer Active option set to Yes. The default Timer Active set for systems States can be changed if relevant for the organization. For example, it may not be appropriate for an organization to have SLA Triggers fire when a Request is moved to the system default "On Hold" State.

The following icons displayed in the Service Terms box, visually indicate how the Request is tracking against the SLA and if the SLA timers are active:

Current SLA Status

	Workflow is in an SLA paused State. Triggers will not fire.
	Workflow is in an SLA timers on State. Triggers will fire.
	Workflow is in an Exit State and the SLA has been successfully met.
	Assigned SLA has been breached and Workflow is in an Exit State.

Supervisor Users can verify the Timer Active status of a Workflow by scrolling over the Status in the Workflow map available in the Summary Information screen, or within the Service>Workflows>selected Workflow> Lifecycle>selected Status screen.

Service	
SLA Active	<input checked="" type="radio"/> Yes <input type="radio"/> No
SLA Restoration	<input type="radio"/> Yes <input checked="" type="radio"/> No
SLA Resolution	<input type="radio"/> Yes <input checked="" type="radio"/> No

Priority

The Priority determines the timeframe in which a Request should be handled and sets the service level targets adopted by the Request that drive the SLA triggers and actions. It represents the degree of importance of the Service Request to the Customer and also indicates the urgency of the Request to the Technician.

A Request can have one of four possible Priorities:

- ◆ Urgent
- ◆ High
- ◆ Medium
- ◆ Low.

Setting Request Priority

The Administrator configures the options for determining the Priority within the Setup>Privileges>Request tab. The Priority options include:

- ♦ Selected Priority - where the system configured default Priority is applied to the Request but can be manually adjusted by the User
- ♦ Derived Priority - where the Impact is derived from the Item Criticality and the User enters the Urgency, enabling the system to calculate the Priority.

Urgency: The value selected reflects how quickly a resolution is required

Impact: The value selected indicates the impact the Request has on the User and Organization. The higher the Impact the higher the Priority to resolve the Request.

If the Administrator has set the Request Priority option to Derived, the Priority of a Request results from the Impact being mapped from the Criticality of the Item and then combined with the selected Urgency. However, if required, the Impact can be manually adjusted within the Request Information screen to affect the Priority.

The following table displays the calculations applied by the system using the Item Criticality mapped directly to the Request Impact, to determine a Request's Priority:

Impact / Urgency	Urgent	High	Moderate	Low	Very Low
Critical	1.000	0.850	0.700	0.550	0.410
High	0.850	0.723	0.595	0.468	0.349
Moderate	0.700	0.595	0.490	0.385	0.287
Low	0.550	0.468	0.385	0.303	0.226
Very Low	0.410	0.349	0.287	0.226	0.168

The above calculations result in the following Priorities:

Priority	Upper	Lower
Urgent	1	0.83
High	0.83	0.58
Medium	0.58	0.34
Low	0.34	0

Request Assignment and Escalation

When a Request is logged within the system, it is allocated to the Team that is associated with the SLA and Workflows used by the Request or to the default Team assigned to a Workflow State. The Request Status is automatically set to the default Entry State of the Workflow.

The appropriate Request Workflow is assigned within the Request Summary tab, by selecting an option from the Workflows drop-down list. This list is derived from the SLA assigned to the Customer, Organizational Unit and Item. Once the Workflow is selected, the associated Teams are available for assignment. Based on the Team assigned, a Technician in the Group associated with the first State of the selected Workflow is allocated to work on the Request. This can be adjusted manually, if required. As the Request moves through the Workflow, it is allocated to an Assigned Technician within the Group associated with the assigned State.

Note, that if the Technician assigned to the Request is also included in the Group associated with the next Workflow State, the system will by default reassign the Request to the same Technician when it moves to that next State.

It should also be noted that for each Service Request Team, there is an over-arching layer of escalation above the Technicians assigned to each Workflow State. This means that throughout the Workflow Lifecycle, in addition to changing the Technician by moving Workflow States, the Request can be escalated to a higher level of support if required.

The Request is automatically escalated according to the SLA assigned to the Request and the triggers configured within the Priority of the SLA. A Request is escalated if the assigned User exceeds the Escalation trigger point defined for the Response, Restoration or Resolution time of the assigned SLA, when the assigned Workflow State is an SLA Active State. Or, it can be manually escalated by a User, if required.

Request Assignment

When a Request is assigned to a User, the system follows a series of steps to look for the most appropriate Technician for the job, based on skill set, location and workload. The order of business logic is as follows:

1. The system will identify the Team associated with the Service Request's SLA and associated Workflows
2. The system will find Technicians/Supervisors assigned to the Team
3. If Users are assigned to an Organizational Unit, the system will identify the Users that belong to the same Organizational Unit as associated with the Request by the Customer assignment
4. If Classifications/Skills are assigned to Users, the system will find Technicians/Supervisors assigned to the Request's selected Classification
5. Based on the Team configuration, if the Live Priority option is enabled for the Team, the system will look for a User who is logged into the system
6. The system verifies Work Hours/Availability of Users within the Team for appropriate Request assignment
7. The system will assign the Request to the User who has the lowest workload, i.e., the fewest number of Open or Pending Requests
8. If there is a tie, the system randomly allocates the Request to a User in the tie.

If a more appropriate Team member is available, the User assigned to the Request can re-assign it manually by selecting a Technician from the drop-down Technician list in the Request Information screen.

Note, if the Self Assign option is enabled for the Team, the system assignment logic is ignored and the User creating the request is automatically assigned the Request.

Automated Escalation

A Request's Service Level Agreement includes trigger points that set the rate at which automated escalations will occur for a Request. Auto-escalation is triggered when the number of support hours specified for either a Request's Service Level Response, Restoration or Resolution time is exceeded and the SLA Trigger action is set to Escalate. When it is escalated, the Service Request is assigned to a Technician in the over-arching escalation layer for the assigned Service Team.

Manual Escalation

The Escalate button next to the Technician name in the Service Request Screen, escalates the Request to an over-arching escalation layer for the Service Team. Any Technician or Supervisor assigned within the escalation layer can be allocated to the Request.

Escalation On Off

Escalation Layer Layer 2

Technician Neil Green

Escalation Control

If the Escalation Control functionality is enabled in Admin>Setup>Privileges>Requests, the option to enable or disable Escalation within the Service Request Information Summary screen is available to Supervisor Users.

NOTE: This option is only visible to Supervisor Users. Once a Request is created, a Supervisor can elect to switch the Escalation option to Off. This means all SLA timers stop, which prevents escalation. Switching the option back to On will re-start the timer and reactivate the SLA triggers.

Notification

The Notify option sets the method of messaging used by the application to notify Customers and Technicians of the following changes to a Service Request:

- ◆ Request created
- ◆ Request closed
- ◆ Request deleted
- ◆ Request Note added
- ◆ Request escalated (Technician only).

The default notification status of Requests is set on a per Team basis, within the Users>Teams>Team Information screen, with the default recipients of new Notes being configured by the Administrator in the Setup>Email>Setup tab. However, these settings can be adjusted on a per Request basis within the Notification Method field and on a per Note basis, when new Notes are created.

The methods of Notification can be set for Technicians and Customers, and include:

- ◆ None, which ensures that no messages are sent
- ◆ Email, which means an email is sent containing the Service Request detail updates
- ◆ SMS notifications, which sends an SMS message about the Request update. This is only available to Users who have a mobile number and a service provider entered in their User and Customer Information screen.

Notification	
Customer	Email <input type="text"/> Customer <input type="text"/>
Customer CCs	<input type="text"/>
Technician	Email <input type="text"/> Technician <input type="text"/>
Technician CCs	<input type="text"/>
Alternate Team	<input type="text"/>

Notifications can be sent to:

- ◆ Customer - the Customer who logged the Request
- ◆ All Owners - all Customers who share the Item assigned to the Request

- ♦ Customer CC's - email addresses to receive Customer email correspondence when the CC field is selected in the New Notes screen
This field may be automatically populated by the system with email addresses included in the CC list of the original email used to create the Request. Multiple addresses should be separated by a comma.
- ♦ Technician - notifications can be sent to the Technician assigned the Request, to all members within the Team assigned to the Request, or restricted to members within the Group to which the Request is assigned
- ♦ Technician CC's - enter email addresses that are to be sent Request Notifications when the Technician CC option is selected in the New Notes screen
Multiple addresses should be separated by a comma.
- ♦ Alternate Team - this option is visible if the Notify Alternate Team option is enabled in the Admin>Email>Setup tab and other Teams assigned to the same Process are configured in the system. Notifications can be sent to a Team within the related Process, by the User selecting an option within the drop-down list.

The following is a sample email sent by the system to the Customer and assigned Technician, confirming the creation of a Request. The message sent can be customized by the system Administrator:

Email Sample

Thank you for contacting our support department.

Your problem has been received and allocated to a technician. You will be notified via email of the progress, or you may login to our support site at any time to check the status of your incident.

Incident Information	
Incident #:	100053
Date Opened:	08/18/06 15:24 (mm/dd/yy hh:mm)
Classification:	Printing
Technician:	Supervisor User
Item #:	100005
Item Type:	word
Identifier:	
Customer:	Bob Samson
Company:	Sales
Due Date:	08/21/06 15:24
Description:	Whenever I try to print in Word, nothing happens.

Workflow

When a Service Request is created it is assigned a Workflow that governs the lifecycle of the Request. The SLA allocated to the Request determines the Workflow options made available for the Request. Before saving the Request, the User can adjust the system assigned Workflow, if more than one Workflow option is available.

After the Workflow is assigned to the Request, all stages of the assigned Workflow can be viewed by selecting . The Workflow map displays the entry points (blue boxes), transitional States (yellow boxes) and exit points (red boxes).

The User moves the Request through the Workflow Lifecycle by adjusting the options displayed in the Next Action field.

Moving through the Workflow

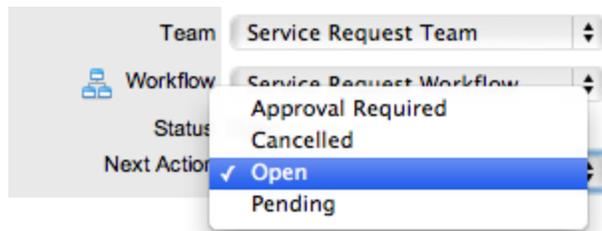
To move a Service Request through the stages of the Workflow, in the Summary tab of the Service Request Information screen:

1. Click Edit

The Next Action field with a drop down list of Status options is displayed below the Status field.

2. Click on the Next Action field

The Status options are displayed. This list is based on the configuration of the assigned Workflow.



3. Select a State

4. Click Save.

The selected Status is assigned to the Service Request with the updated logic applied (i.e., the SLA Timers may now be active or inactive based on the newly assigned State configuration or an alternative Work or Manager Group may have been assigned to the Request).

Approval State

Approval States in Service Request Workflows provide the facility to approve or reject Request activity to Manager Groups, Customers and Line Managers. When a Request moves into an Approval State, the Edit button is only visible to Manager Users within the Manager Group or the Team Lead when the Request is in a Customer or Line Manager Approval State. For Manager Approval States, Users who are not Managers within the Team, can send a reminder to action a Request, by selecting .



Managers who are assigned a Request for approval can 🗑️ (approve) or 🚫 (reject) the Request, which automatically moves the Request to the next pre-configured stage of the Workflow. Requests assigned a Customer or Line Manager Approval State can be processed via the Customer Portal or email.

Service Request	
Team	Service Request Team
Workflow	Service Request Workflow
Status	Approval Required
Next Action	🗑️ 🚫

Assigning a State with an Underpinning Contract

Each State of a Workflow can be customized for either internal support contract management that is monitored by an OLA, or out-sourced to an external support provider, which is monitored by an Underpinning Contract.

When a Service Request moves into a State that is governed by an Underpinning Contract, for internal contract control the Service Request can be assigned to the Service Level Manager, if configured in the Workflow. This allows the Manager to maintain control of the Service Request, and to easily follow up with the external service provider, if required. The assigned SLM will be able to adjust the current Status, add Notes and update the Contract Monitor information in the Impact tab.

Service Request Information

Customer | Analysis | Summary

Service Request # 100062

Details

- Title
- Customer: Jason Blacklett
- Item Number: Email Service
- Type: Email Services
- Classification: Question
- Urgency: Moderate
- Impact: High
- Priority: High

Assignments

- Escalation: On
- Escalation Layer: Layer 1
- Technician: Craig Wilson (Service Level Manager)

Notification

- Customer Email: Customer
- Customer CCs
- Technician Email: Team
- Technician CCs

Service Request

- Custom 1
- Custom 2
- Custom 3
- Type Custom 1
- Type Custom 2
- Team: Service Request Team
- Workflow: Service Request Workflow
- Status: Pending
- Status Due: 3/20/16 14:50

Assigned to Service Level Manager because "Assign SLM" option set to "Yes" within the Outsourced State of the Workflow configured in the Service > Workflow tab.

Due date is calculated based on the Underpinning Contract assigned to the Workflow state

Alternatively, the Workflow State can be configured for the Technician assigned at the time the Request is moved to the Underpinning Contract State to maintain Request editing privileges and manage adherence to the assigned service agreement. If the Workflow is configured for the responsibility of the Request to be maintained by the Technician when the Request is in an external contract state the Technician will be able to adjust the current Status, add Notes and, if the Technician is assigned the Internal Process of Service Level Management amend the Contract Monitor information in the Impact tab.

OLA Status Due

Within the Summary screen, the Status Due field is visible when a Workflow status is monitored by an OLA. The time, date and percentage remaining information displayed is calculated using the OLA's Target Resolution time.

Service Request	
Team	Service Request Team
 Workflow	Service Request Workflow
Status	Investigating
OLA	Problem OLA
Status Due	03/30/12 16:56 (82% Remaining)

Team Assignment during the Workflow Lifecycle

To ensure that all Requests are managed throughout the Workflow, the Team assigned to the Request when it is first logged within the system is set as the default Team. If a Request moves to a State that has an OLA assigned with a Team, the Request is re-assigned to that OLA's Team. When the Request moves out of the OLA State to a State where no OLA or Team is assigned, the Request is re-assigned to the default Team.

Pending - No Contract Status

When the Contracts or Invoices functionality is enabled and a Request is created, the system will verify the service entitlement status of the Customer and if a valid contract is not in place, the new Request is assigned a Status of Pending-No Contract and locked until a valid contract is associated with the Request.

In a Request Group where the Customer and Organizational Unit does not have a Contract, if an Item applied to a Request has a Contract and another does not, a relevant Status will be applied to each Request. The User will be able to edit the Request with a valid Contract, but the Request without a Contract will be locked down to a Pending - No Contract Status, until a valid Contract is applied to the Request.

Incident	
Team	Device-Incident Team
 Workflow	Incident Workflow
Status	Pending - No Contract

The Customer is automatically sent the NoContractCreateRequestSummary email when the request is saved with the Status. A reminder email can be sent by the Technician from within the Summary tab by clicking , when the Request maintains this Workflow Status assignment. See: [Contracts](#).

Summary Tab

- ◆ [“Summary” on page 239](#)
- ◆ [“Changing the Customer of a Request or Item” on page 243](#)
- ◆ [“Converting a Service Request to an Incident” on page 244](#)
- ◆ [“Item Relationship Map and Assignment” on page 245](#)
- ◆ [“Updating the Item associated with the Request” on page 245](#)

Summary

The Summary tab provides comprehensive details related to a Service Request. In addition, it also gives access to the tabs that are required to work on the Request.

IMPORTANT: In the Summary page, you can view or update the available details:

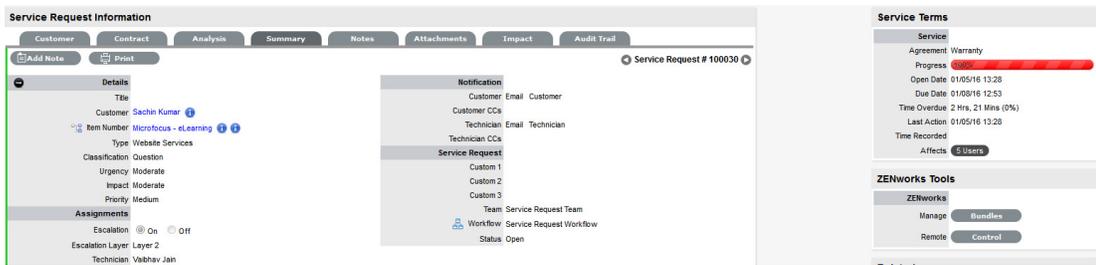
- ◆ To view details of a Customer, select the Customer name link within the Service Request Information screen.
 - ◆ To update details of the **Customer** and the **Item** assigned to the Service Request, click  within the Summary tab when the request is in Edit mode.
-

The Service Request Information Summary tab screen includes the following:

Summary Tab	Description
<i>Details</i>	<p>The following details are displayed:</p> <ul style="list-style-type: none">◆ Customer: The customer assigned to the request. Click on the customer name link to view customer information. Scroll over the information icon  next to the Customer for quick information such as Username, Org.Unit, Phone and Local Time.◆ Item: An item assigned to the request. Select the Item Number link for more information about the Item. Scroll over the information icon  next to the Item Number to view Item information recorded on the Details tab. <p>Click  to view the Item Relationship map. Any Item displayed in the map can be set as the Item associated with the Request, by making it the central node of the Relationship map and clicking on the centralized map icon to confirm the Item assignment change.</p> <p>To update the Item assigned to the request, click on the Customer tab and ensure the Request is in edit mode, or use the Update Item facility in the Relationships filter view of the impact tab.</p> <ul style="list-style-type: none">◆ Type: Service request type such as Internet Explorer◆ Classification: Request Classification that was selected when the Request was created. This can be updated, if required.◆ Urgency: Indicates if the service request is to be taken up on priority.◆ Impact: Displays the progress of a Service Request in relation to agreed Service Level targets and Workflow time estimates. Impact could be critical, high, moderate, low or very low.◆ Priority: Shows the priority of the Request, which determines the Service Level triggers applied to the Request. <p>If the Derived option is enabled in the applications Setup, then the Urgency and Impact drop-down lists are displayed. The User is required to select the corresponding Urgency and Impact for the Request to alter the Priority assigned.</p>

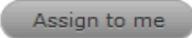
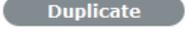
Summary Tab	Description
<i>Assignments</i>	<p>The following details are displayed:</p> <ul style="list-style-type: none"> ◆ Escalation: This is visible if the Escalation Control option is enabled in the application Setup. This is only available to the Supervisors, and allows them to disable the escalation timers. ◆ Escalation Layer: The name of the current Group of Users assigned to the Request. When the Workflow State is updated, this could also result in an update of the assigned Group of Users. ◆ Technician: The name of the Technician assigned to the Request. When a Service Request is assigned to the Queue, the name applied in the Technician field is System User. ◆ Subject: The details recorded in the Subject field are displayed in scroll-over summaries throughout the application. For example, when a new Request is being entered for a Customer, a Recent Customer Requests list is displayed during the Request creation process for all Items that the Customer owns either directly or via shared ownership. ◆ Description: The Request report entered during the Request creation is recorded and displayed as description. Amendments can be made to the Request report if required, but it should be noted that an Audit Trail is <i>not</i> maintained for alterations made within this screen. Therefore, it is recommended that any Request report amendments be entered as a Request Note.
<i>Notification</i>	<p>The following details are displayed:</p> <ul style="list-style-type: none"> ◆ Customer: This displays how updates regarding the Request are sent to the Customer who logged the Request, or to all Owners of the Item associated with the Request. ◆ Customer CCs: <i>Customer CCs</i> is a free text field for any additional notification recipients, these can be divided into Customer and Technician CC lists. ◆ Technician: Allows the User to adjust the default Technician notification between None, Email or SMS for updating the assigned Technician, all Technicians in the Team or Layer of Escalation assigned to the Request. ◆ Technician CCs: <i>Technician CCs</i> is a free text field for any additional notification recipients. These can be divided into Customer and Technician CC lists.

Summary Tab	Description
<i>Service Request</i>	<p>The following details are displayed:</p> <ul style="list-style-type: none"> ◆ Team: Displays the default support Team assigned to the Incident. This can be changed by selecting another option within the drop-down list. The Team list is derived from the Workflow and Workflow State ◆ Alternate Team: This information is visible if the Notify Alternate Team option is enabled in the Admin>Email >Setup tab and another Team within the same Process is included in the system. This allows the User to define another Team to be notified about updates regarding the Request. ◆ Workflow: Displays the default Workflow assigned to the Incident. This can be changed by selecting another option within the drop-down list. The Workflow list is derived from the SLA assigned to the Incident. Select  to view the Workflow in its entirety. ◆ Status: Shows the current Workflow State of the Request. ◆ Next Action: Lists all the States available after the current Request State. This is based on the Workflow assigned to the Request. To move the Service Request through the Workflow, select a Status included in the list displayed. By assigning a different Workflow State, the Work or Manager Group assigned to the Request may also be automatically updated, based on the Workflow and Team Configuration. Refer to the Escalation Layer and Technician fields to view if an assignment change is made as part of the Status update. ◆ Status Due: Displays details of the expiry time for the current Workflow State if the State has an OLA assigned.
<i>Service Terms</i>	<p>The following details are displayed:</p> <ul style="list-style-type: none"> ◆ Agreement: This is the Service Level Agreement assigned to the Request. The service level is derived from either the Customer, Organizational Unit or Item. ◆ Service Manager: Displays the name of the Service Level Manager responsible for overseeing Requests related to the assigned service agreement. ◆ Progress: Visually displays how the Request is tracking against the assigned SLA and displays the percentage of SLA used when greater than 10%. The grey progress bar is gradually filled in based on the status: <ul style="list-style-type: none"> ◆  - Workflow is in an SLA paused state. Triggers will not fire. ◆  - Workflow is in an SLA timers on state. Triggers will fire. ◆  - Workflow is in an Exit state and the SLA has been successfully maintained. ◆  - Assigned SLA has been breached and Workflow is in an Exit state. ◆ Dates: Summarizes the important date details for the Request. The Due Date is automatically calculated based on the Service Level assigned to the Request. ◆ Time Recorded: Displays the amount of time the Service Request has been open and worked on. ◆ Affects: Displays the number of Users assigned to the Item.



NOTE: Only Technicians assigned to the Workflow Group of the Request can edit the Request.

Summary Tab Buttons

	Edit opens the Request in edit mode. This allows the Request details to be amended, Notes to be added and time is automatically recorded against the Request whilst in edit mode.
	Changes the default assignee of the request to a different technician. This right is available only for technicians belonging to the same layer or team.
	Opens the Request in edit mode and moves directly to the New Note editor.
	Duplicate creates a copy of the Request and links the copy to the original Request. The User can then amend the Customer or Item details, if required.
	Print opens a summary of the Request in a Print View window. This includes a Description and all Notes added to the Request. It is a good alternative for viewing Request information within one window when adding a new Note.
	Allows the User to create or view reminders related to the Request. When published, it will be displayed like the normal alert icon.
	This option is visible next to the Item Type, if the Request is in a Workflow State with the Item Editable option is set to Yes. Click the icon to edit the Item details.
	The escalation buttons allow the User to escalate the Request to the next layer within the Team, or de-escalate the Request to the lower level, if required.

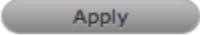
Changing the Customer of a Request or Item

After a Request is created, it may be necessary to change the assigned Customer or Item. This may be the case when the Unknown Item is associated with a Request, or a Service Item has been assigned to the Request and the relevant hardware, software or network Item needs to be associated with the request. When the "Allow Unknown" option is disabled in the Setup>Privileges>Requests tab and a Request that is assigned to the Unknown Item is opened in Edit mode, the User will be prompted to update the Item assigned to the Request before the Save button action can successfully record changes to the Request.

NOTE: This option is required when a Request is created through email, as the Item assigned may be the system's default Unknown Item or the Org Unit's default Item.

To change the Customer:

1. Click the Request's Edit button
2. Select the Request's Customer tab
3. Click  next to the Customer Name
4. Search and select a Customer
5. Click

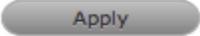
 Apply

If the Request's Item needs to be altered as a result of the Customer change the Find Item field appears. Search and select the appropriate Item using the Find Item search.

6. Select the Summary tab, to continue working on the Request
7. Click Save.

To change the Item:

1. Click the Request's Edit button
2. Select the Request's Customer tab
3. Click the Item Number 
The Find Item option appears.
4. Search and select a new Item
5. Click

 Apply

The Request is updated.

6. Select the Summary tab to continue working on the Request, or click Cancel and Done to close the Request with the newly assigned Item.

NOTE: Technicians do not have the ability to delete Requests or Customers.

Converting a Service Request to an Incident

Service Requests are logged against Service Items and can be converted to Incidents within the Analysis tab. This action results in the Incident maintaining the same request identification number and audit trail that records the conversion.

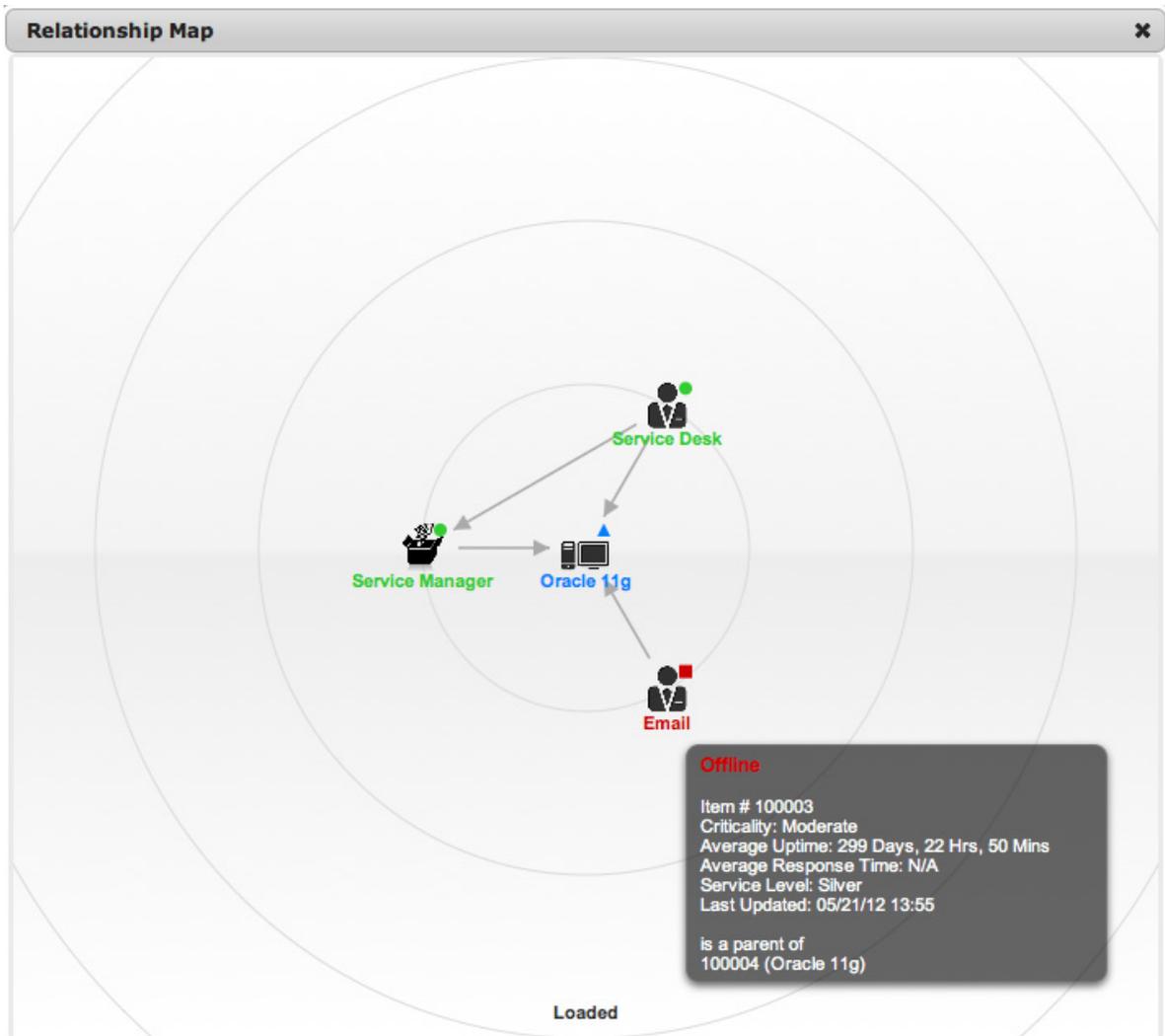
To convert a Service Request to an Incident:

1. Select Edit within the Analysis tab
2. Select the Convert to Incident option.

The Service Request ID # is associated with a new Incident and the Incident is assigned the Entry State of a relevant Incident Workflow. The audit trail of the Incident records the conversion time and date. The customer is not notified about the Process amendment.

Item Relationship Map and Assignment

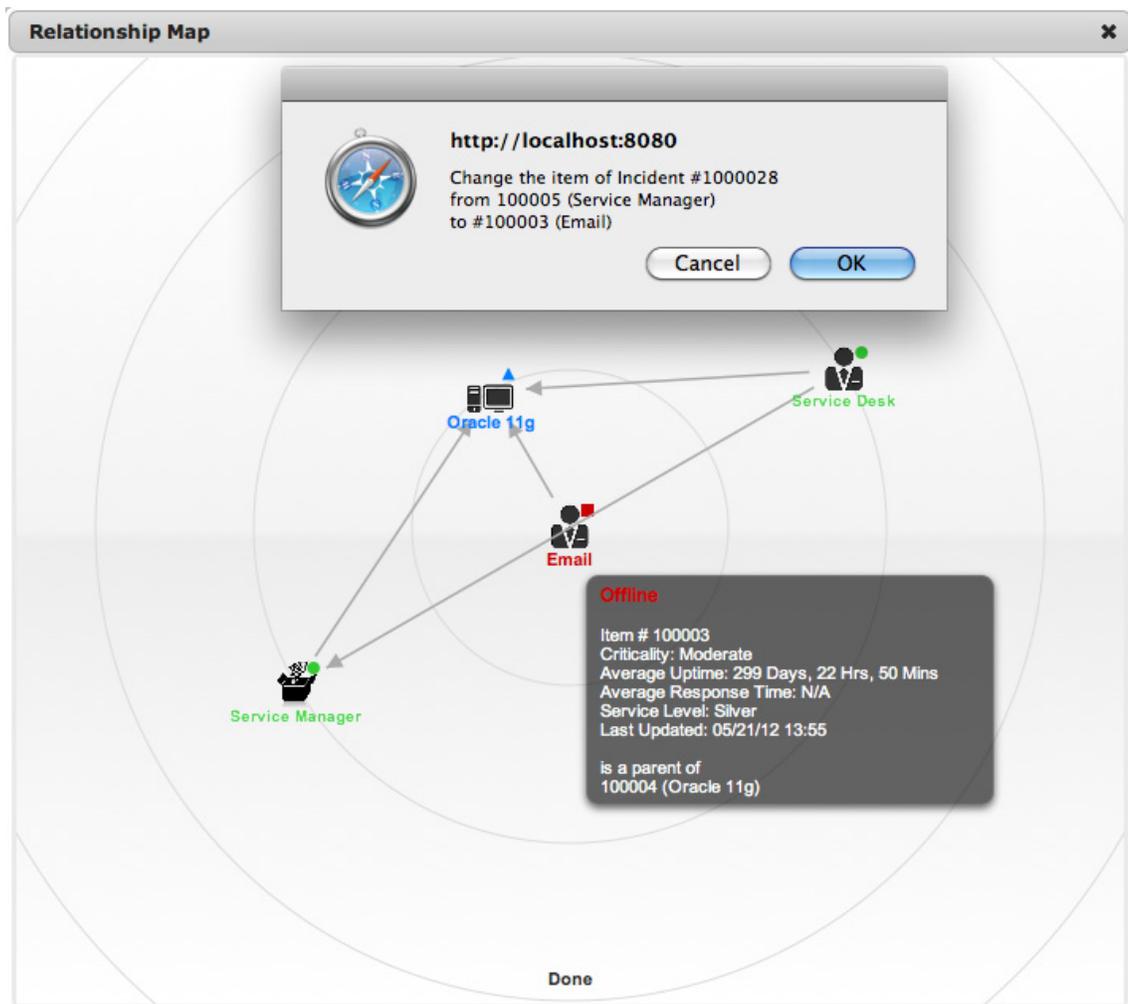
Selecting  opens a pop-up window that displays a map of Items that are related to the Request Item that can be navigated by clicking on the icons within the map. To view related Item information, scroll over the relevant Item icon.



Updating the Item associated with the Request

The Item associated with the Request can be updated when in the request is in Edit mode:

1. Select 
2. Navigate the map to move the relevant Item icon to the central point of the map
Select the Item icon label in the Map to move it to the central node.
3. Click the icon label when it is in the middle of the map
A warning message is displayed, prompting the confirmation of the Item change.



4. Select OK and the Item association will be updated
(If the Enable Item Shadow option is enabled by the Administrator in the Setup>Privileges>Customer tab, the change of Item information will not be visible on the Customer Portal.)
5. Select  to close the window.
The Item assignment change is recorded in the Audit tab.

See: [Item Relationships](#).

Notes Tab

- ◆ [“Notes” on page 247](#)
- ◆ [“Add Note Button” on page 247](#)
- ◆ [“Viewing All Notes” on page 247](#)
- ◆ [“Adding a Note” on page 247](#)
- ◆ [“Create Knowledge” on page 249](#)
- ◆ [“Solution” on page 249](#)
- ◆ [“Propose Handshake” on page 249](#)

- ◆ “Draft Note” on page 250
- ◆ “Changing the Status of a Note” on page 250
- ◆ “Viewing a Note” on page 250
- ◆ “Replying to a Note” on page 251
- ◆ “Emailing Saved Request Notes” on page 251
- ◆ “Adding Notes to Groups” on page 251

Notes

The Request Notes tab displays entries made by a User regarding the Request. New Notes are date-stamped automatically and associated with the User logging the Note.

The number of Notes recorded against a Request is displayed in brackets on the Notes tab, and if a Note has been added by a Customer or a Technician other than the Technician assigned to the Request, an asterisk will also be visible on the Notes tab until the assigned Technician opens the Note.

Add Note Button



The Add Note button can be used to open the Request in Edit mode and automatically access a new Note window, as shown in Step 4 below.

Viewing All Notes



Use a Request's Print button to access a list of all Request Notes in one screen. To hide Private Notes in the Print output, remove the tick from the Show Private Notes box.

Adding a Note

When the first Note is created for a Request, the Request Description automatically populates the New Note editor allowing the Technician to enter their response.

To add a Note:

1. Click the Request ID Number

The Service Request Information>Summary tab appears.

2. Click Edit
3. In the Notes tab, click New
4. Enter the Note details

Or, select a Template if a relevant pre-configured response has been set for the Item or Type Category for the Item assigned to the Request.

5. Enter Note Time

The time entered represents the amount of time accumulated to formulate the Note's content or time spent working on a request away from the system. If no additional time has been spent on the Request away from the application this field will be automatically populated with the Logged Time when the Request is in Edit mode, if the Manual Request Time option is disabled in the

Setup>Privileges>User tab. When this option is disabled,  is visible next to the Service Request number in the top right corner of the Summary Tab screen when the Request is in Edit mode. (See: [Contracts Logged Time](#).)

6. Adjust the time and date work was completed, if relevant

7. Add attachments to be sent with the Note, if required, by clicking  to search and upload the attachment

A maximum of two attachments can be added per Note.

8. Adjust the Note visibility, if relevant

The default Private or Public visibility for Email Notes is set within Admin>Setup>Privileges>Requests, and can be adjusted on a per Note basis.

9. Refine the Email Recipient options as required

The default Request Notifications for Notes is set within the Team assigned to the Request, and can be adjusted on a per Note basis.

Vendors, as Email Recipients, is displayed as an option if the Request is in a State associated with an Underpinning Contract.

10. Click .

The Note editor screen will close and the Note will be emailed to recipients, if defined.

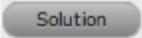
NOTE: A Technician can only add Notes if they belong to the work group associated with the current Request status.

Create Knowledge

NOTE: This option is only visible for Public Notes

When a new Note is created for a Request it can be added to the Knowledge Base by selecting the Create Knowledge option. By selecting this option and then clicking the Propose or Solution button, the system automatically moves the Request to the default Closed State for the Workflow and creates a Solution Knowledge Base Article with a visibility of Assigned Request. This visibility allows Customers of a shared Request to view the Solution. For the Solution to be available to other Customers of the same Item Type, the visibility must be adjusted to Technicians and Customers within the Analysis tab of the Request or the Knowledge Tab.

Solution

A rectangular button with rounded corners and a light gray background, containing the word "Solution" in a dark gray font.

If a Request Note resolves the Customer issue, the Note can be saved as the Solution. This Solution can be converted to a Solution Article, found under Request Information>Analysis tab and available in the Knowledge Base, by enabling the Create Knowledge option before selecting the Solution button. Clicking the Solution button will automatically move the Request to the default Closed State. If a Solution is applied to a Request containing attachments, the attachments are included in the Solution email.

To save a Note as the Solution:

1. Enter the Note details
2. Select Create Knowledge, if the Note content is to be available in the Knowledge Base
3. Click Solution.

For Create Knowledge enabled Notes the content will be recorded as the solution under the Analysis tab. The Status of the Request will change to default Exit State of the assigned Workflow.

NOTE: This option is not available if the Handshaking facility is enabled in Admin>Setup>Privileges>Requests.

Propose Handshake

A rectangular button with rounded corners and a light gray background, containing the word "Propose" in a dark gray font.

If a Note is a possible solution to a Request, it can be sent to the Customer with a notice stating the Request will be closed in a set number of days if no correspondence is received from the Customer. (The time span, in days, is specified by the Administrator in Setup>Privileges>Requests, or adjusted on a per Org Unit basis). This Note can be converted to a Solution Article, found under Request Information>Analysis tab and available in the Knowledge Base, by enabling the Create Knowledge option before selecting the Propose button.

When the Propose button is selected with the Create Knowledge option enabled, the Create Knowledge field is visible when the Summary tab is in edit mode and the Request is waiting to close. If the option is disabled and the Request moves to the Closed State, the proposed Note will not be available in the Knowledge Base.

To send a Note with a Handshake Notification:

1. Within the Notes Editor, enter the possible solution
2. At the bottom of the Notes field, click the Propose button. The proposed solution and handshake notification will be sent to the Customer. The Request will automatically change status to On Hold - Pending Approval.

NOTE: For a Customer to re-open a Request using the link in the handshake email, the web server must be using Port 80.

Draft Note

Draft

Use the Draft button to save an incomplete Note entry, which will be displayed in the Notes list. When a Note is saved as a draft, the Status will be displayed as . If the Add Note button is selected when a draft Note has been recorded against a Request, a warning will be displayed. To continue working on a draft Note, open the request in Edit mode and select the Note No. hyperlink.

Changing the Status of a Note

- ◆ When the Note is created, it can be either public or private. After the Note is saved, it is possible to switch visibility
- ◆ If a Note is marked Private, a padlock graphic is visible. To change the status to Public, click  to display 
- ◆ To change the Public Note to Private, click  to display .

Viewing a Note

An asterisk is visible on the Notes tab when the Technician assigned to the Request is yet to view a Note added to the Request.

To view a Note:

1. Select a Request ID Number
2. Select the Notes tab
3. Click on the Request Note Number hyperlink.

No.	Date	Note	By	Public	Status	Minutes
12	01/12/16 11:43	---- Initial Description ---- Please enroll my name in the E-Learning Portal. Name ...	Sankar R			0

Click to view

1 - 1 of 1 Results

When Notes are viewed without opening the Request in Edit mode by clicking the Note No. link, the User can scroll through the Notes list by selecting   inside the top right corner of the Notes window.

Replying to a Note

Reply

To reply to a Note, which will include the Note as part of the email:

1. Click the required Request ID number
The Service Request Information screen appears.
2. Select Edit
3. Select Notes tab
4. Click on the Note number
The Note is displayed.
5. Click Reply
The new Notes editor is opened and includes the existing Customer Note.
6. Enter the Note content
7. Adjust the Visibility and Recipients settings, accordingly
8. Select Add Note to send the Note, or click Draft to finish the Note later.

Emailing Saved Request Notes

Email

To email a Customer after a Note has been saved:

1. Click the required Request ID number
The Service Request Information screen appears.
2. Select Edit
3. Select Notes tab
4. Click on the Note number
The Note is displayed.
5. Click Email to send the Note to the Customer and any other Users added to the Notification list.

Adding Notes to Groups

When a Note is created for a Request that belongs to a Group, the Apply to Group option is visible within the Notes tab. If the new Note is to be assigned to all Requests within the Group, select the Apply to Group option.

NOTE: Any new Requests added to the Group at a later date will also have all pre-existing Notes, with this option selected, applied to the newly Grouped Request.

When the Apply to Group option is selected, the Add Note Time to Group option is displayed. Select this checkbox to also apply the Note Time to each of the Requests.

Visibility Private Public
 Message Recipients Customers CCs
 Technicians CCs
 Create Knowledge Yes No

Selecting the Apply to Group option and then clicking the Solution button, closes all Requests within the Group.

Attach Tab

- ◆ [“Attach” on page 252](#)
- ◆ [“Adding an Attachment” on page 252](#)
- ◆ [“Deleting an Attachment” on page 253](#)

Attach

The Attachments tab displays all attachments recorded against a Request, including ones attached via an emailed Request, attachments added to new Notes created by Technicians and attachments uploaded directly through this tab.

All Users can attach any type of file to a Service Request.

Adding an Attachment

To add an Attachment:

1. Select a Request number ID
2. Click Edit
3. Select the Attachment tab
4. Click

New

No file selected.
 Private

5. Browse and select a file
6. Mark Private, if the attachment is not to be available on the Customer Portal
7. Enter a file description, if necessary
8. Select to upload the file or to cancel the process.

The uploaded attachment is automatically date stamped and shown as a File Name link with its file size.

To open an Attachment, select the file name hyperlink.



NOTE: Requests that are part of a Request Group and have attachments uploaded within the Request Group Details Screen and are shared within the Group display  within the Share Column.

Deleting an Attachment

To delete an Attachment, select the checkbox beside the File Description then click Delete. The addition or removal of Attachments is recorded within the Audit Trail of the Request.

Impact Tab

- ◆ [“Impact” on page 253](#)
- ◆ [“Service Targets” on page 254](#)
- ◆ [“Service Level Breaches” on page 254](#)
- ◆ [“Services Affected” on page 255](#)
- ◆ [“Estimates” on page 255](#)
- ◆ [“Contract Monitor” on page 256](#)

Impact

The Impact tab provides the capability to measure the progress of a Service Request relative to agreed Service Level targets and Workflow time estimates. It also includes a quick reference for identifying other Services or Items affected by the Request. This tab displays a summary of the following:

- ◆ Service targets
- ◆ Workflow estimates
- ◆ The impact of the current Service Request on related infrastructure.

The drop-down filter options within the Impact tab include:

Options	Description
Service Targets	Displays the target response, restoration and resolution times based on the Service Level Agreement/OLA assigned to the Request.
Service Level Breaches	Displays service level breaches that have occurred and allows Users to assign a breach code and explanation for the breach.
Services Affected	Displays the Service Item Number, the Service SLA and number of Affected Users for any Services related to the Item associated with the Request.
Estimates	Provides a summary of the time estimated for each state of the Workflow based on the OLA assigned to the Request.

Options	Description
Planned Outages	Provides a list of all the Planned Outages for the Item assigned to the Request.
Contract Monitor	If the current Service Request Workflow State is assigned an Underpinning Contract or OLA, a table is displayed outlining the response, restoration and resolution milestones. When a milestone is met, the User is required to check the relevant checkbox. The application will automatically calculate the actual time accrued to achieve the milestone. The value displayed here is used for the Contract reports.
Purchases	When Purchase Orders are enabled in the system, any Purchase Orders associated with Items assigned to the Request are accessible through this option.

Service Targets

The details displayed here are drawn from the Service Level assigned to the Request. These include the target Response, Restoration and Resolution times for a Request, based on the Priority assigned. If an Underpinning contract or OLA has been assigned to the Request's current state then the targets for that contract will also be listed.

The screenshot shows a table titled "Problem Information" with tabs for Customer, Contract, Analysis, Summary, Notes, Attachments [2], Impact, and Audit Trail. The table has a "Display:" dropdown set to "Service Targets" and a "24 x 7 support" column. The data row shows:

	Name	Priority	Response Time	Restoration Time	Resolution Time	24 x 7 support
SLA	SLA	Medium	18 Hours	36 Hours	72 Hours	Yes

For more information on Service Targets, see: [Service Level Agreements](#).

Service Level Breaches

When a Request Service Level Agreement is violated, a service level breach is recorded against the Request. The User assigned to the Request will be notified and asked to provide a reason for the breach, and assign a Breach Code.

The screenshot shows a table titled "Service Level Breaches" with tabs for Description, Notes, Attachments, Impact, and Audit Trail. The table has a "Display:" dropdown set to "Service Level Breaches" and an "Edit" button. The data row shows:

SLA breached	Warranty
SLA priority	Warranty - Low
Phase breached	Response
Event date	05/09/11 23:25
Technician responsible	Simone Supervisor
Breach code	
Additional Info	SLA Breached - Response Time Exceeded (24 hrs)

To assign a Breach Code:

1. Click the Request number
2. Click Edit

3. Select Impact > Service Level Breaches
4. Select the Phase of the SLA that was breached
If more than one SLA Phase has been breached, multiple options will be available in the Phase breached field.
5. Click Edit
The breached Phase is locked down and the Additional Info field is opened in Edit mode.
6. Assign a Breach Code
(The available codes are created by the Supervisor within the Service tab.)
7. Add any additional information, if required
8. Click Save.

All breach information is used for reporting on Service Level Agreements.

Services Affected

When the request is logged against an Item that is associated with Services within the Item Relationships tab, the Services Affected option displays the following:

- ◆ Service Item Number
- ◆ Service SLA
- ◆ Number of affected Users

Estimates

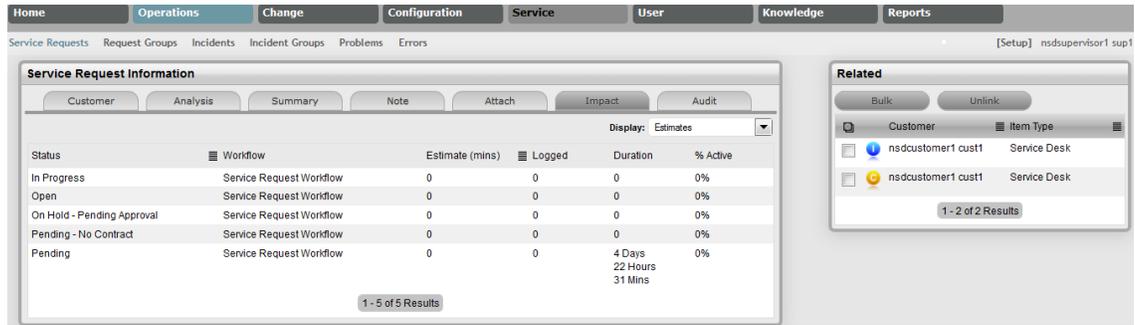
The Estimates option allows Users to view an indication of the approximate time a Request should remain in each State of the Service Request Workflow, the amount of time logged in each State and the length of time the Request resided in each State.

Options	Description
Estimate	Indicates the approximate length of time the Request will spend in the Workflow State. This field is automatically completed if an OLA or UC is assigned to the Workflow State.
Logged	Is a combination of time accrued against the Request when in edit mode with the automatic timers enabled, and the sum total of Note Times manually entered by Users.
Total	The total time a Request has resided in the Workflow State.
% Active	The percentage of the Total time that the Request was actively worked on when in the State. The calculation is, (Logged Time divided by Total Time) x 100.

The Estimate Times are drawn from the OLA and Underpinning Contract assigned to the current State. However, these can also be adjusted manually for each Request. To manually adjust the estimated time for a Workflow State:

1. Select a Request number ID
2. Click Edit
3. Move to the Impact tab, select Estimates from the drop-down list
4. Select the State hyperlink within the Status column of the Estimate Time to be adjusted
An editor box is displayed.
5. Enter the adjusted time in the available field
6. Click Save within the editor box

7. Make any other time adjustments, if required
8. Select Save to record all manually entered time adjustments against the Service Request.



Contract Monitor

When a Workflow State with an OLA or Underpinning Contract is assigned to the Request, the Contract Monitor displays the details of the Contract. The information is used for reporting purposes and includes:

Details	Description
Contract Type	Specifies if the Contract Type is an OLA or Underpinning Contract.
Start Time	Auto-generated time the request moved to the current Workflow State.
Milestones	
Expected Response Time	Response Time calculated using the Contract target parameters.
Responded	Actual Response Time auto-calculated when the User checks the box.
Expected Restoration Time	Restoration Time calculated using the Contract target parameters.
Restored	Actual Restoration Time auto-calculated when the User checks the box.
Expected Resolution Time	Resolution Time calculated using the Contract target parameters.
Resolved	Actual Resolution Time auto-calculated when the User checks the box.
Comments	Allows for additional comments, if required.

Details

Underpinning Contract: Canton Services
Start Time: 05/11/11 21:21

Milestones

Expected Response Time: 05/12/11 21:21 | ← Breached Response Time

Responded:

Expected Restoration Time: 05/13/11 21:21

Restored: ←

Expected Resolution Time: 05/15/11 21:21

Resolved: ←

Comments:

Check when the Service Provider meets the Restoration or ResolutionTime

NOTE: If Milestones are breached the Response, Restoration and Resolution times are assigned a red marking.

Audit Tab

- ◆ “Audit” on page 257
- ◆ “Audit Trail” on page 258
- ◆ “Resource Utilization” on page 258
- ◆ “Item Audit Trail” on page 258
- ◆ “Request Approvals” on page 258

Audit

The Audit tab lists all activities that occur within the lifetime of a Request, the resources used and the history of the Request’s Item. It provides access to information relating to Approval activities that are logged against the Request.

Home Operations Change Configuration Service User Knowledge Reports

Service Requests Request Groups Incidents Incident Groups Problems Errors

Service Request Information

Customer Analysis Summary Note Attach Impact Audit

Display: Audit Trail

Date	Status	Action	By
02/26/15 20:49	Pending	SLA Resolution breached (100% elapsed)	System User
02/26/15 20:48	Pending	SLA Restoration breached (100% elapsed)	System User
02/26/15 20:47	Pending	SLA Response Time: Escalated from Default Group to...	System User
02/26/15 20:47	Pending	SLA Response breached (100% elapsed)	System User
02/26/15 02:46	Pending	Service Request Created by Customer	nsdcustomer1 c

Description: ...

1 - 5 of 5 Results

Audit Trail

The Audit Trail option records all the activity related to a Request. The recorded activity, which can be exported to PDF includes:

- ◆ Date and time the Request was assigned and/or reassigned to Users
- ◆ When the Request moved to a new state, or had its Priority or Due Date changed
- ◆ Details of Notes added
- ◆ Attachments activity
- ◆ Classification change
- ◆ Logged time.

Resource Utilization

The Resource Utilization option displays a breakdown of the time a Request was worked on at each level of support. It details the User's name, the escalation layer they belong to, and the amount of time they spent on the Request.

Item Audit Trail

The history of the Item associated with the Request is detailed within Item Audit Trail. To access more information regarding an Item Audit Trail entry, select the ID number hyperlink.

Request Approvals

For Requests that are assigned an Approval State, the details, including the time and date the Request entered and exited the Approval State, are recorded within this tab. Select the Date hyperlink to view the Approval Action information. The complete list and details can be exported using the PDF option.

Item Relationships

Infrastructure Items that have a connection can have the relationships mapped within the CMDB. Items that are linked display the related Item details under the Relationship tab.

Users can view and create relationship maps for an Item opened in Edit mode with other Items within the CMDB within the Relationships tab to define the infrastructure that underpins Services within the Service Catalog. For more information about creating a Service Catalog and relationship mapping also refer to [Service catalog](#).

NOTE: Items imported using AMIE automatically have the relationships mapped within the system.

To create a new Relationship:

1. Select Configuration>Items
2. Select an Item
3. Select the Item Relationship tab
4. Click New
5. Select the Direction from the drop-down menu

The options are:

Parent-Child: A Service Oriented view describes relationships top-down with the Service at the top. For example, the Service Email Provision, would be at the top level with relationships between Configuration Items described, ending at an individual User.

Child-Parent: A Component Oriented view starts from the bottom up, with the Service being the top layer.

For a Service, such as the Email or Web Site Service, it is recommended that the Hardware be defined as the Parent for the Software Items and the Software be defined as the Parent of the Email or Web Site Service.

The screenshot shows the 'Item Information' page for 'Item # Microfocus - Intranet (Website Services)'. The 'Direction' is set to 'Parent - Child'. The 'Type' dropdown menu is open, showing 'Hierarchical' and 'Connection' as options. Below this, there is a search field for 'Item Number' and a table of related items.

Item #	Item Type	Identifier	Status
jdk-7u60-windows-x64	Windows Bundle		Installed
Wordweb7	Windows Bundle		Installed
Firefox 1.0	Windows Bundle		Installed

6. Select the Type
Hierarchical or Connection.
7. Select the Relationship description from the drop-down list
8. Use the Find Item field to locate the relevant Item
9. Click on the Item Number hyperlink to create the Relationship.
10. Click Save to display the newly created Relationship map.

To navigate any connections that may exist within the Relationship map, click on the Item icon and this will automatically move the User to the Information details of the selected Item.

New
Delete
 Print

Item # Service Desk (Service Desk)

Loaded

Direction
Child - Parent
Display: 10

Current Item	Relationship	Related Item	Item #	Identifier	Category
Service Desk	is a child of	Windows Bundle	Microsoft 2010		Service

1 - 1 of 1 Results

The map displays the relationship between each Lifecycle State by using different colors to represent the type of Lifecycle State.

Color

- Green Circle CI is assigned an online status.
 - Red Square CI is assigned an offline status.
 - Blue Triangle Service CI is assigned a pre-production status.
-

The Lifecycle State name can be accessed by scrolling over the Item icon within the Map.

AMIE Item imports and relationships

Items with Item relationships that have been imported using the AMIE engine retain the relationships that exist within the Asset Management Tool. A visible map of the relationships is recorded within the Relationships tab.

To delete a Relationship:

1. Select Configuration>Items
2. Select an Item
3. Select the Item > Relationship tab
4. Click Edit
5. Select the Delete button

A list of all the Item relationships are displayed.

6. Select the direction of the relationship
The options are Parent - Child or Child - Parent.
7. Use the checkbox beside the Current Item to select the relationship for deletion

Item Information

Information Details Costs Requests Relationships Outages AMIE Snapshots

Print Item # srm-tst-nsd-223 (Dell Latitude E6430)

Direction: Parent - Child Display: 10

Current Item	Relationship	Related Item	Item #	Identifier	Category
<input type="checkbox"/> Dell Latitude E6430	is a parent of	Windows Bundle	Notepad++		ZENworks Bundle
<input type="checkbox"/> Dell Latitude E6430	is a parent of	Windows Bundle	Firefox 1.0		ZENworks Bundle
<input type="checkbox"/> Dell Latitude E6430	is a parent of	Windows Bundle	Microsoft 2010		ZENworks Bundle

1 - 3 of 3 Results

Cancel Delete

8. Click the Delete button.

The relationship between the Current and Related Item is removed.

Service Terms

The Service Terms sidebar displays the Service Level Agreement (SLA) assigned to the Service Request and provides details of key dates.

Service Terms

Service	
Agreement	Warranty
Progress	<div style="display: inline-block; border: 1px solid #ccc; padding: 2px;"> Paused  </div>
Open Date	
Due Date	01/11/16 14:59
FSC Date	
Last Action	01/08/16 14:59
Time Recorded	
Affects	<div style="display: inline-block; border: 1px solid #ccc; border-radius: 10px; padding: 2px 5px; background-color: #f2f2f2;"> 1 Users </div>

By default the application calculates the Due Date based on the Priority of the SLA assigned to the Customer, Organizational Unit or Item. The email reminders and escalations are then managed accordingly. If an SLA is not associated with the Service Request via the Customer, Org Unit or Item, the system default SLA will be automatically assigned to the Service Request but can be manually adjusted by the Technician. Once the Workflow is moved from the default Open State, the SLA can no longer be edited.

Service Terms

Agreement	<p>Displays the Service Level Agreement assigned to the Request. The service level is derived from either the Customer, Organizational Unit or Item.</p> <p>When Contracts are not enabled, the Agreement field can be edited, when the Request is in edit mode.</p>
Service Manager	<p>Displays the User assigned as the Service Manager for the assigned SLA.</p>
Progress	<p>Visually displays how the Request is tracking against the assigned SLA. The grey progress bar is gradually filled in based on the status of the SLA:</p> <p> - Workflow is in an SLA paused State. Triggers will not fire.</p> <p> - Workflow is in an SLA timers on State. Triggers will fire.</p> <p> - Workflow is in an Exit State and the SLA has been successfully maintained.</p> <p> - Assigned SLA has been breached and Workflow is in an Exit State.</p>
Open Date	<p>The open date field is automatically populated when the Request is created.</p>
Due Date	<p>By default the application calculates the Due Date based on the SLA Target for the Priority assigned to the Request, and email reminders are sent accordingly.</p>
Fix Date	<p>Auto-filled when the Request moves into a Workflow State that is defined as meeting the SLA Resolution Time.</p>
Remaining	<p>Auto-filled and visible when there is SLA time remaining.</p>
Time Overdue	<p>Auto-filled and visible when the SLA is overdue.</p>
Close Date	<p>Auto-filled when the status of a Request is set to Closed. This date is fixed.</p>

Service Terms

Resolution Time	Auto-filled with the number of minutes it took for the Request to move from the first SLA active state to a Workflow State that is defined as meeting the SLA Resolution Time.
Last Action Date	Auto-filled when Done or Save is selected after the Request has been modified or opened in edit mode. As changes may be made to a Request after it has been Closed, this date may fall after the Close Date.
Time Recorded	Displays the sum total of automatically logged time, when the Request is in edit mode plus any manually entered Note Times.
Affects	Number of Customers assigned to the Item associated with the Request.

NOTE: Each User can customize the date format within the My Account sub-menu option. To change the date format go to Home > My Account, click Edit and select the preferred format.

Time Recorded

Time Recorded uses a combination of auto-timing and manual Note Time entries to measure and monitor the time spent working on a Request.

The Auto-timer is activated when a Request is opened in edit mode, if enabled by the Administrator in the Admin>Setup>Privileges>User>Manual Incident Time. When the Request is saved after any amendments have been made, the timer stops and records the length of time the Incident has been worked on. This total is added to the sum total of any manual Note Time entries made by Technicians when they are adding Notes.

The Time Recorded is used by the system when the Contracts functionality is in use. See: [Contracts](#).

Related Requests

The Related Requests sidebar is automatically displayed when a Service Request is linked to other requests.

- ◆ [“Managing Related Requests” on page 264](#)
- ◆ [“Bulk Options” on page 264](#)
- ◆ [“Remove Related Requests” on page 265](#)

Requests can be linked in the following ways:

- ◆ Using the Group option within the Service Request list
- ◆ Using the Service Request Groups feature under the Request tab
- ◆ Linking requests within the Request's Analysis tab

- ◆ A result of multi-Item Request creation.

Related	
Customer	Item Type
<input type="checkbox"/>  Sachin Kumar	Website Services
<input type="checkbox"/>  Guruprasad S	Website Services
<input type="checkbox"/>  James Stewart	Service Desk

1 - 3 of 3 Results

Any Requests that belong to a Group can be viewed within the Related sidebar window, inside the Service Request Information screen. Within this window, all related Service Requests are listed and can be controlled as one. For example, Notes can be applied to all related Requests or the entire Group can be closed.

Managing Related Requests

The details of a Related Request can be viewed by hovering the mouse over the colored Icon. Click on the same Icon, and the system moves to the Request Information screen of that associated request.

Related	
Request	Item Type
100034	
Report Date 2016-01-08 14:45:37.342	
Customer	
Status Pending	
Sachin Kumar	Website Services
Classification Question	
Technician Vaibhav Jain	Website Services
Guruprasad S	
<input type="checkbox"/>  James Stewart	Service Desk

1 - 3 of 3 Results

Bulk Options

The Bulk option allows one or more linked Requests to have the following information updated simultaneously:

- ◆ Priority, Workflow, Status, Team, Escalation Layer & Technician
- ◆ Notification method and recipients
- ◆ Request Classification
- ◆ Items
- ◆ Description, Attachments and Notes.

To complete a Bulk update for any of the above elements:

1. Go to Operations>Service Requests
2. Click on the Request # link of the relevant Grouped Request

3. Tick the checkboxes of the appropriate requests in the Related Requests sidebar that are to be updated
4. Select

Bulk

The system displays the Bulk Editor screen.

The system does not allow Requests with a status of Pending-No Contract to be updated

NOTE: If the Bulk update is only associated with Requests of this Status, an error message is displayed noting that one or more Requests need to be selected.

5. Amend the appropriate element as per the above list
6. Click Save.

Remove Related Requests

To remove a request from a Group:

1. Go to Operations> Service Requests
Or, within Operations>Request Groups select the Group # link and move to the Elements tab
2. Click on the Request # hyperlink of a Grouped Request
3. Click

Edit

The Request opens in Edit mode and checkboxes become available next to the requests in the Related sidebar.

4. Tick the checkboxes of the requests to be removed
5. Select

Unlink

The marked requests are removed from the Group.

Managing Related Requests

- ◆ [“Grouping Service Requests” on page 265](#)
- ◆ [“Creating a New Group via the Service Request Tab” on page 266](#)
- ◆ [“Adding Requests to an Existing Group” on page 266](#)
- ◆ [“Merging Request Groups” on page 266](#)
- ◆ [“Grouping Service Requests” on page 267](#)
- ◆ [“Multi-Item Requests” on page 267](#)
- ◆ [“Multi-Item Request Item Assignment” on page 268](#)

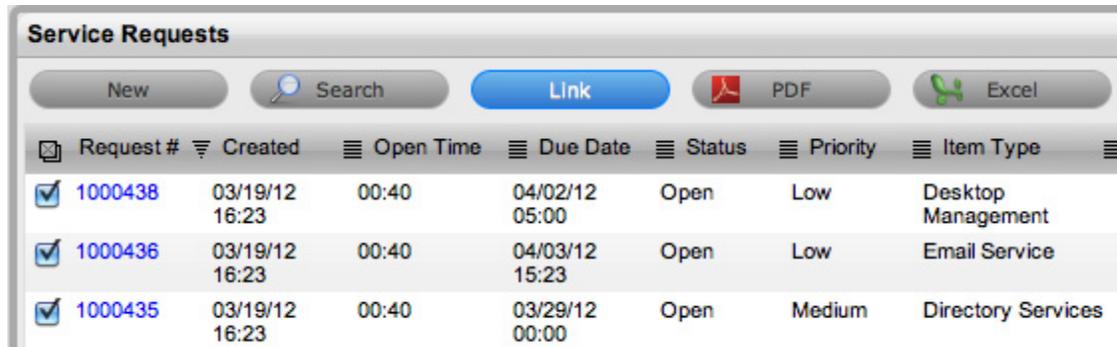
Grouping Service Requests

Service Requests can be linked to form project Groups when Requests are related in some way (e.g., Requests that have the same solution). New Groups must consist of Requests that are not already linked.

Creating a New Group via the Service Request Tab

Within the Service Requests List View:

1. Select Operations>Service Requests tab
2. Tick check boxes in the far left column of unlinked Requests

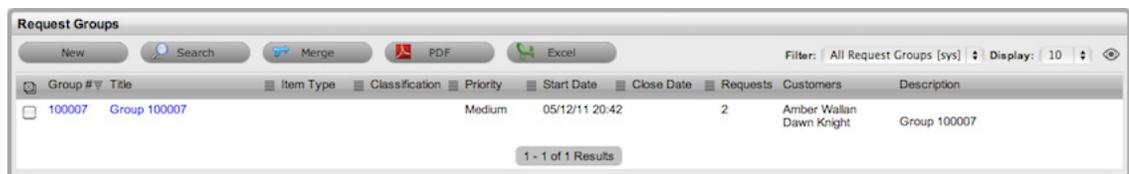


The screenshot shows the 'Service Requests' interface. At the top, there are buttons for 'New', 'Search', 'Link', 'PDF', and 'Excel'. Below these is a table with the following columns: Request #, Created, Open Time, Due Date, Status, Priority, and Item Type. Three requests are listed, each with a checked checkbox in the far left column.

Request #	Created	Open Time	Due Date	Status	Priority	Item Type
<input checked="" type="checkbox"/> 1000438	03/19/12 16:23	00:40	04/02/12 05:00	Open	Low	Desktop Management
<input checked="" type="checkbox"/> 1000436	03/19/12 16:23	00:40	04/03/12 15:23	Open	Low	Email Service
<input checked="" type="checkbox"/> 1000435	03/19/12 16:23	00:40	03/29/12 00:00	Open	Medium	Directory Services

3. Click Link to group the Requests.

A Group Number will be assigned and an instant Group hyperlink will appear under the Group column.



The screenshot shows the 'Request Groups' interface. At the top, there are buttons for 'New', 'Search', 'Merge', 'PDF', and 'Excel'. Below these is a table with the following columns: Group #, Title, Item Type, Classification, Priority, Start Date, Close Date, Requests, Customers, and Description. One group is listed with a checked checkbox in the far left column.

Group #	Title	Item Type	Classification	Priority	Start Date	Close Date	Requests	Customers	Description
<input checked="" type="checkbox"/> 100007	Group 100007			Medium	05/12/11 20:42		2	Amber Wallan Dawn Knight	Group 100007

Requests that are included in a Request Group are listed within the Elements tab of the Request Group. See: [Request Groups](#).

Adding Requests to an Existing Group

To add Requests to an existing Group:

1. From the Service Request list, check the boxes of the new Requests and at least one existing member of the Group to which you wish to add the Requests
2. Click Link.

NOTE: This will not work if Requests representing more than one group are included. For instance, if you have two Groups (A and B) each with two Requests (A1, A2, B1 and B2), and you want to add two unlinked Requests to Group A, click the check boxes for the unlinked Requests and either A1 or A2 or both. If B1 or B2 is also clicked, the linking process will fail because it will not know which group to add the two new Requests to.

Merging Request Groups

Existing Request Groups can be merged within the Request Groups tab, to allow all related Requests within the Groups to be managed as one. To combine Request Groups:

1. Go to Operations>Request Groups
2. Check the fields next to the relevant Group #'s
3. Click Merge

The screen defaults to the Details tab for the Merge Group.

4. Set the Name, Item Type, Classification, Status, Priority and Description that best defines all associated Service Requests
5. Click Save.

The History tab records details of the Groups merged to form the new Group. Click the No. hyperlink to view the details. The Impact tab records the Type and Number of requests associated with the Group.

Grouping Service Requests

Service Requests can be grouped by selecting the checkboxes next to the Request #, followed by the Link button.

NOTE: The type of Request Group created is based on the Service Request type assigned to the Group.

- ◆ If the Group contains Service Requests, it is a Service Request Group
- ◆ If the Group contains Service Requests and Incidents, it is an Incident Group
- ◆ If the Group contains Service Request and Problems, it is a Problem Group
- ◆ If the Group contains Service Request/Incidents/Problem/Change, it is a Change Group.

If a Service Request is related to an Incident, Problem or Change Request and that related request in the other Process is closed, the Service Request is automatically closed. The system views the request hierarchy from low to high as Service Request, Incident, Problem and Change Request, and if a related request of a higher type is closed, all the lesser type requests are automatically closed, or if the handshaking facility is enabled for the system, moved to the Pending-Approval State.

Multi-Item Requests

Also displayed within the Service Request Groups List View are Groups of Requests that are created as Multi-Item Requests. These Requests allow for multiple Items to be assigned during the Service Request creation process and result in separate Requests being created for each Item assigned to the initial Request, which are then displayed within the Related window of the Service Request Information screen.

The Requests are managed as individual tasks, although they may be updated in bulk. This allows for the specific requirements of Items being modified to be managed effectively, ensuring each Item has its own Audit Trail, Attachments and Notes for future reference.

Multi-Item Requests are also listed as separate Service Requests within the Service Requests List View.

Service Request Information

Customer | Analysis | Summary

Duplicate | Print | Alerts

Service Request # 100001

Contact

Title

Customer: Francis Young

Org Unit: MyCompany - Azure

Phone

Local Time: Fri, 27 Apr 2012 15:53:15

GPS

Item

Type: Email

Number: 100003

Status: Available

Criticality: Moderate

Details

Classification: Permission Denied

Urgency: Moderate

Impact: Low

Priority: Medium

Escalation: On Off

Escalation Layer: Implement Group

Technician: Scott Daly

Notification

Customer: Email | Customer

Customer CCs

Technician: Email | Technician

Technician CCs

Service Request

Team: Service Request Team

Workflow: Service Request Workflow

Status: Open

Next Action: Open

Service Terms

Service

Agreement: Silver

Service Manager: Simone Supervisor

Progress: 83%

Open Date: 04/19/12 16:36

Due Date: 05/02/12 10:36

Remaining: 4 Days, 18 Hrs, 42 Mins (17%)

Last Action: 04/27/12 15:51

Time Recorded: 1 Mins

Affects: 19 Users

Related

Bulk | Unlink

Customer | Item Type

Carla Parsons | Service Desk

1 - 1 of 1 Results

Multi-Item Requests are created like a single Item Request, but have more than one Item assigned during the Service Request creation process. See: [Create a Request - Item Information](#).

Multi-Item Request Item Assignment

After assigning a customer to a Request move to the Find Item field to assign Items to the Request:

1. Click the relevant Item link if listed below the Find Item search box

Or, [Search for an Item](#) or click to [Create an Item](#).

The option to create an Item is only available to Technicians if the system Administrator has enabled the Create Items option within the Setup>Privileges>User screen.

Request Information

Customer | Details

Customer

Title

Name: James Stewart

Org. Unit: Micro Focus - Information Technology

Room

Email: james@nsd.com

Phone

Mobile

Fax

Pager

Address 1

Address 2

City

State

Zip

Country

Item

Item Number: Wifi Service

Category: Service

Item Type: WIFI Service

Identifier Type:

Team: Change Management Team

Room

Service: Warranty

Cancel | Add | Next

2. Click Next to move to the Details tab if only one Item is to be assigned to the Request

Or, select Add to assign additional Items. If Add is selected, a Request Selections window will be displayed that lists all the current Items assigned to the Request.

Selections		
Customer	Item No.	Item Type
James Stewart	Wifi Service	WIFI Service

1 - 1 of 1 Results

- Continue to add all the relevant Items to the Request and then select Next to move to the Details tab

Within the Details tab the Request is profiled by assigning a Classification and Description.

- Select the Classification, enter the Subject and Description
- Click Done to enter all Requests simultaneously.
The Requests are created individually and automatically applied to a Group.

Billing: Contracts and Invoices

- ◆ [“Contract Validation Process” on page 270](#)
- ◆ [“Create & Process a Request with Contracts enabled” on page 271](#)
- ◆ [“Request with Per Item Contract” on page 271](#)
- ◆ [“Request with Per Request Contract” on page 272](#)
- ◆ [“Grouped Requests and Contracts” on page 273](#)
- ◆ [“Processing an Invoice” on page 273](#)
- ◆ [“Invoice Cancellation” on page 273](#)
- ◆ [“Time Recorded” on page 274](#)
- ◆ [“Recording Time against Contracts” on page 274](#)

Billing within the system allows support organizations to manage their Customers' service and support contracts. This can be achieved by the system Administrator enabling the preferences of Contracts, with or without the preference of Invoices, within the Billing option of the Setup tab.

Billing

Setup **Contracts**

Billing Module

Enable Purchase Orders Yes No

Enable Contracts Yes No

Enable Invoices Yes No

Display SLA Prices Yes No

Email Notifications Enabled Disabled

Global Settings

Currency United States Dollar

Save

When Contracts are enabled without Invoices, system contracts can be created without the need for charging Customers for the support provided. Whereas, the Contracts option combined with Invoices allows the application to manage service contracts and process payment within the one facility.

There are a number of Contract Types available within the system, and these include:

IMPORTANT: Per Request - covers the period of time for which the request is open and work completed

Per Item - covers the Item, regardless of the number of requests logged against the Item but can be created for the following:

Subscription - a contract that covers a specified period of time

Time Limited Subscription - a contract that covers either a specific time period or number of support hours, whichever limit is reached first

Support Hours - a contract that defines the number of support hours covered

Support Hours by Month - a contract that covers a total number of support hours purchased for a defined timeframe and allocated on a per month basis.

When Billing is enabled in the application's Setup, a maintenance contract must exist for either a Customer, Organizational Unit or Item, before a request can be processed.

Contract Validation Process

When a request is created and Contracts are enabled with Invoices, the system validates the contract status for a Customer, Organizational Unit or Item. As part of the contract validation process, the application selects the first element found on this list:

1. Customer (with a valid contract)
2. Org. Unit (with a valid contract)

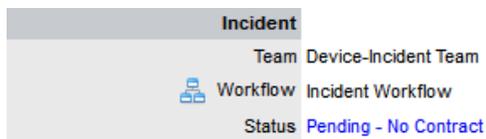
3. Item (with a valid contract)
4. Customer (with a pending contract)
5. Org. Unit (with a pending contract)
6. Item (with a pending contract)
7. No contract found, then either a Per Request or Per Item contract is created through the request.

NOTE: When a Pending Contract is selected, the Contract must be processed before work can be undertaken on the request.

Create & Process a Request with Contracts enabled

When the Contracts or Invoices functionality is enabled and a request is created, the system will verify the service entitlement status of the Customer and if a valid contract is not in place, the new request is assigned a status of Pending - No Contract and locked until a valid contract is associated with the request.

In a Request Group where the Customer and Organizational Unit does not have a Contract, if an Item applied to a request has a Contract and another does not, a relevant status will be applied to each request. The User will be able to edit the request with a valid Contract, but the request without a Contract will be locked down to a Pending - No Contract status, until a valid Contract is applied to the request.



The Customer is automatically sent the NoContractCreateRequestSummary email when the request is saved with the Status. A reminder email can be sent to the assigned Customer by the Technician from within the Summary tab by clicking .

Two types of Contracts are used by the system, these include Per Item or Per Request Contracts. They are defined as follows:

- ◆ Per Request - covers the period of time for which the request is open and work is done
- ◆ Per Item - covers the Item, regardless of the number of requests logged against the Item and can be defined as:

Subscription - a contract that covers a specified period of time

Time Limited Subscription - a contract that covers either a specified period of time or number of support hours, whichever limit is reached first

Support Hours - a contract that defines the number of support hours covered

Support Hours by Month - a contract that covers a total number of support hours purchased for a defined timeframe and allocated on a per month basis.

Request with Per Item Contract

To create a *Per Item* Contract for a request within the Summary tab of the request:

1. Click the Pending - No Contract link

The Contract tab is displayed with Contract Type and Service Level drop-down options.

The screenshot shows a web interface titled "Service Request Information" with a "Contract" tab selected. Below the tab are two dropdown menus: "Contract Type" and "Service Level". A "Cancel" button is located in the bottom right corner of the form area.

2. Select the Contract Type of Per Item

For the Per Item Contract Type the Time Period for the Contract can be defined as one of the following:

Subscription if selected, the Start and End Dates are automatically set to a year from the date of creation, but can be edited if required

Time Limited Subscription if selected, the Support Hours field is displayed and the number of support hours purchased by the Customer should be entered. Also, the Start Date and End Date fields should be completed manually by entering the length of time for the subscription period, or the system will default to entering a year from the date of creation

Support Hours if selected, the number of support hours purchased by the Customers should be entered

Support Hours by Month if selected, set the number of hours purchased per month and define which day of the month the contract is to rollover to start the new month. The Total Support Hours will automatically be calculated based on the Start and End Dates set for the Contract.

(If a Contract is forward dated with a Start Date set in the future, the Pending Contract status is assigned.)

3. Click Save

The maintenance contract is created.

4. Click Next to continue to create the request by defining the Classification and Description.

NOTE: If Invoices are enabled, a new invoice is automatically saved within the Finance>Invoices screen for the newly created Contract.

Request with Per Request Contract

To create a *Per Request* Contract for a request within the Summary tab of the request:

1. Click the Pending - No Contract link

The Contract tab is displayed with Contract Type and Service Level drop-down options.

2. Select the Per Request Contract Type

(The SLA Price and Tax option box is displayed, if Invoices are enabled for the system.)

3. Select the SLA

(If required, check the box to indicate if tax is to be applied to the Invoice, which will be applied to the Invoice that is automatically saved within the Finance>Invoices screen when the newly created Contract is saved.)

4. Click Save

(If the Service Level selected for the request has a cost associated with it, the request will be assigned with the status Pending - No Contract. Work cannot commence on the request until payment for the invoice is received.)

5. If the Service Level has no cost i.e., Warranty, the maintenance contract is created and work can commence on the request immediately

6. Click Done.

The screen defaults to the Summary tab.

Grouped Requests and Contracts

Contracts can be applied to all requests within an Incident Group when a *Per Request* contract is created within the Contract tab of a grouped request. The following options are available:

- ◆ Per Group - applies the Contract to the Request Group as a whole and assigns a single charge for the Contract. On the associated Invoice, if relevant, the SLA Price is distributed evenly across each Request line-item
- ◆ Per Request - applies the Contract to the Request Group but assigns the SLA Price as an individual charge to each request within the Group. On the associated Invoice, if relevant, the SLA Price is applied to each request line-item.

The screenshot shows the 'Incident Information' dialog box with the 'Contract' tab selected. The 'Contract Type' is set to 'Per Request', 'Service Level' is 'Bronze', and 'Apply to uncontracted' is checked. The 'Charge base' dropdown menu is open, showing 'Per Group' selected. Below the form is a table of targets.

Priority	Response Time	Restoration Time	Resolution Time	24 x 7 support	Alert
Urgent	12 Hours	24 Hours	36 Hours	No	Action
High	24 Hours	26 Hours	60 Hours	No	Action
Medium	30 Hours	48 Hours	84 Hours	No	Action
Low	36 Hours	60 Hours	108 Hours	No	Action

Processing an Invoice

If invoice payment for the SLA contract is required before the User can commence work on the request, the following system message is displayed:



Warning

The Service Request has been flagged as "Pending - No Contract". Technicians will not be able to work on this Service Request until the invoice has been paid.

When a request is flagged with this status, the Edit button will not be available within the Summary tab and a User assigned the Finance Role must process invoice payment before the request can be edited.

To process payment for an invoice see: [Invoice Payment and Delivery](#)

Invoice Cancellation

To cancel an Invoice for a request:

1. Select the Request # id
2. Select the Request with the Status Pending - No Contract

3. Click the Cancel hyperlink in the Summary tab.

This will cancel the Invoice and change the request Status to Cancelled - Unpaid.

Time Recorded

Although it is important for organizations to know exactly how much time is spent working on requests for internal reasons, it is crucial for organizations using Time Based Subscription contracts and Support Hours contracts. These Contract types rely on the amount of time worked on requests to be subtracted from the number of hours a Customer has purchased as part of their service contract.

Recording Time against Contracts

To give organizations greater control and more accurate data regarding time used to work on a request, the system records the time in two areas:

- ◆ When a Note is added, the User has the option to complete the Note Time field, for the time they spent working on the request away from the application



The image shows a user interface element for recording time. It consists of the text 'Note Time' followed by a plus sign, a vertical double-headed arrow icon, a text input box containing the number '15', and the text '(minutes)'.

- ◆ When a request is opened in Edit mode, the system clock monitors the point at which it was placed in Edit mode until it is Saved and moved out of Edit mode. (This functionality is applied if the Admin>Setup>Privileges>User>Manual Incident option is set to No.)

These two amounts are added and recorded within the Time Recorded field in the Service Terms sidebar.



The image shows a sidebar element with the text 'Time Recorded' followed by '16 Mins'.

The Time Recorded is then deducted from the number of support hours purchased by a Customer. The remaining contract time can be viewed via the Item > Costs tab, the Customer > Contracts tab, or the Organizational Unit > Contracts tab, where relevant.

Service Request Groups

Service Requests that are related can be linked to form Groups. Once the Group has been created, Requests can be managed as one.

For example, Requests can be grouped if:

- ◆ They are all logged by Users of one department
 - ◆ They are all logged by one Customer
 - ◆ They are all logged for the same Configuration Item
 - ◆ They have a common Description or Solution.
-
- ◆ **NOTE:** New Groups must consist of Service Requests that are not already linked, unless the merge facility is used to combine existing Groups.
-

Users can group Requests manually through the Request Groups tab or Service Requests List. (See: [Grouping Service Requests](#).) Service Requests that have multiple Items assigned to them during the Request creation process, are also listed within the Request Groups tab.

Group #	Title	Item Type	Classification	Priority	Start Date	Close Date	Requests	Customers	Description
100007	Group 100007			Medium	05/12/11 20:42		2	Amber Wallan Dawn Knight	Group 100007

When the last Request in the Group is closed, the Status of the Group is automatically set to Closed.

Creating a New Group via the Request Groups Tab

To create a new Group via the Request Groups tab:

1. Select Operations >Request Groups
2. Click New

New Group

Use Template

Name

Item Type Item type not selected

Priority Low

Status Open

Custom 1

Custom 2

Custom 3

Description

Find Item Type (Name)

Path: p Words: 0

Cancel Save

3. Enter a Name for the Group
4. Assign an Item Type, if applicable
5. Assign a Classification, if an Item Type is selected
6. Assign a Group Priority
 - The Status is set by default to Open.
7. Enter a Group Description
8. Click Save

The screen will default to the Analysis Tab, which allows the User to Group existing Requests. The information displayed can be adjusted by using the Filter options.

The screenshot shows the 'Service Request Group - Service Desk Requests' interface. The 'Analysis' tab is selected. The table displays the following data:

Request #	IP	Created	Status	Priority	Item Type	Technician	Team	Customer	Group	Subject
100033		05/12/11 16:12	Closed - Resolved	Medium	Email Service	Amber Wallan	Incident Team	Carla Parsons		having issues
100032		05/12/11 00:57	Closed - Resolved	Medium	Email Service	Amber Wallan	Incident Team	Dennis Barry		KB Test
100031		05/12/11 00:20	Closed - Resolved	Medium	Service Manager	Amber Wallan	Incident Team	Dennis Barry		Testing Solutions
100030		05/11/11 22:34	Closed - Resolved	Medium	Service Desk	Scott Daly	Request Team	John Brown		tech test two
100029		05/11/11 22:32	Open	Medium	Service Desk	Scott Daly	Request Team	Francis Young		Assignment Test

9. Check the field next to the relevant Request # to add Requests to the Group
10. Select Add
The Requests are included in the Elements tab.
11. Click Done to record the new Service Request Group.

The screenshot shows the 'Service Request Group - Service Desk Requests' interface with the 'Elements' tab selected. The 'Remove' button is visible at the top left. The table displays the following data:

Request #	IP	Created	Status	Priority	Item Type	Technician	Team	Customer	Group	Subject
100028		05/11/11 22:13	Pending	Medium	Service Desk	Scott Daly	Request Team	Calvin Johns	Service Desk Requests	Details required
100029		05/11/11 22:32	Pending	Medium	Service Desk	Scott Daly	Request Team	Francis Young	Service Desk Requests	Assignment Test
100030		05/11/11 22:34	Pending	Medium	Service Desk	Dennis Barry	Request Team	John Brown	Service Desk Requests	tech test two

At the bottom of the table, it says '1 - 3 of 3 Results'. A 'Done' button is located at the bottom right of the interface.

Creating a Service Request Group using a Group Template

A Service Group can be created using a Group Template. A Group Template contains a series of tasks in the form of Quick Calls. For more information, see: [Group Templates](#).

Tasks within the Group Template can be created simultaneously or sequentially in the system. If the In Sequence option is used, the first task within the Group Template is created when the Template is selected. When the first task is closed, the next Task within the Template is automatically created and so goes the auto-creation process until all tasks within the Template have been created and closed in sequence.

To create a new Group using a Group Template:

1. Select Operations>Request Groups
2. Click New
The New Group editor is displayed.
3. Select the Use Template checkbox
A list of Group Templates is displayed

New Group

Details Analysis Elements

New Group

Use Template

Name

Item Type

Classification

Status

Priority

Custom 1

Custom 2

Custom 3

Description

Format Font Family Font Size | HTML

A **B** *I* U ABC | | |

Path: p Words: 0

Cancel Next

4. Select an appropriate Template

The Group details are listed.

5. Enter a Name, as unique identifier for this Group

The selected requests for the Group are displayed. These requests are the Quick Calls assigned to the Group Template.

New Group

Details Requests Analysis Elements

Use Template G1

Name | G1

Item Type Iphone 6

Classification General

Status Open

Priority Medium

Custom 1

Custom 2

Custom 3

Description |

Format Font Family Font Size HTML

A **B** *I* U ABC

Group 1 description.

Path: p Words:2

Cancel Next

6. Click Next

New Group

Details Requests Analysis Elements

G1

Find Customer

First Name | Email

Last Name | Phone

Username | Org. Unit

Supported Org. Units Only

Cancel Save

7. Search and select the Customer to be associated with the tasks included in the template

If the Customer details are not in the database and are to be created as part of the tasks included in the template, assign a default customer and update the details in the Customer tab of the Request, when the Customer details exist in the system.

8. Review the Selected Requests displayed for the Group

These Requests are the Quick Calls assigned to the Group Template. To exclude any of the Requests from the newly created Group, untick the checkbox next to the Template name.

New Group

Details Requests Analysis Elements G1

Customer

Name  Sachin Kumar
 Email sachin@nsd.com
 Phone
 Address
 City
 State
 Zip
 Country

Selected Requests

	Order	Template	Status	Priority	Classification	Duration
<input checked="" type="checkbox"/>	1	G1	In Progress	Medium	Question	12
<input checked="" type="checkbox"/>	2	Qc1	In Progress	Medium	Question	12

1 - 2 of 2 Results

Creation On Save In Sequence

Details

Service Request Custom 1

Service Request Custom 2

Service Request Custom 3

9. Define the Creation option:

- ◆ On Save for all the requests to be created when the Request Group is saved
- ◆ In Sequence for the first request to be created when the Request Group is saved.

10. Click Save.

The Group is created including all Quick Call Requests. To add or remove Requests to or from the Group, use the Analysis and Elements tabs (Covered below).

The type of Group created, whether it be a Service Request, Incident, Problem or Change, will depend on the Quick Call Tasks assigned to the Group Template. For example:

- ◆ If all assigned Tasks are Service Requests, the Group will become a Request Group
- ◆ If there are Service Request and Incident Quick Call Tasks, the Group will become an Incident Group
- ◆ If there is at least one Change Quick Call Task, the Group will become a Change Group.

If a Service Request is related to an Incident, Problem or Change Request and the related request in the other Process is closed, the Service Request will be automatically closed. The system views the request hierarchy from low to high as Service Request, Incident, Problem and Change Request, and if a related request of a higher type is closed, all the lesser type requests are automatically closed.

Analysis Tab

Service Requests can be linked to a Group at the Analysis screen of a Service Request Group. To search for Requests to add to the Group, use the system Filters or the Search option.

The system filter includes the following:

Unassigned Requests	Description
Project Requests	Requests that have been assigned to the Change Group/Project.
Unassigned Requests	All Requests that exist in the system and have not been assigned to the Group.
Potential Requests- Keyword match	Requests with keywords that match between the Request description and the Group description. NOTE: Note: The match is only performed on the first 250 characters of the description.
All Service Requests (sys)	Lists all Requests in the system irrespective of Workflow State or User assignment. Note that this option is not visible to Technicians when the privilege to View All Requests is disabled by the Administrator.
My Service Requests (Active) (sys)	Displays all Requests in an active Workflow State that are assigned to the logged-in User.
My Service Requests (All) (sys)	Displays all Requests, in active and inactive Workflow States, that are assigned to the logged-in User.
My Teams Service Requests (Active) (sys)	Displays all Requests in an active Workflow State, allocated to the Teams with which the User is associated.
My Teams Service Requests (All) (sys)	Displays all the Requests, in active and inactive Workflow States, allocated to the Teams with which the User is associated.
Pending Approvals (sys)	If the User has Manager privileges, this view provides them with a list of Requests that are assigned an Approval stage of the Workflow.
Service Requests Queue (sys)	Displays Requests assigned to the System User by default, which Technicians can reassign after viewing. (This is only available if the functionality is enabled for the system and Team.)

To link Requests within the Service Request Group Analysis tab:

1. Go to Operations>Request Groups
2. Select the Service Request Group # link
3. Move to the Analysis tab
4. Choose the Filter option
5. Select the relevant Requests checkbox on the left

Service Request Group - Service Desk Requests

Details Analysis Elements

Add Search Filter: Unassigned Requests Display: 25

Request #	IP	Created	Status	Priority	Item Type	Technician	Team	Customer	Group	Subject
<input type="checkbox"/> 100033		05/12/11 16:12	Closed - Resolved	Medium	Email Service	Amber Wallan	Incident Team	Carla Parsons		having issues
<input type="checkbox"/> 100032		05/12/11 00:57	Closed - Resolved	Medium	Email Service	Amber Wallan	Incident Team	Dennis Barry		KB Test
<input type="checkbox"/> 100031		05/12/11 00:20	Closed - Resolved	Medium	Service Manager	Amber Wallan	Incident Team	Dennis Barry		Testing Solutions
<input type="checkbox"/> 100030		05/11/11 22:34	Closed - Resolved	Medium	Service Desk	Scott Daly	Request Team	John Brown		tech test two
<input type="checkbox"/> 100029		05/11/11 22:32	Open	Medium	Service Desk	Scott Daly	Request Team	Francis Young		Assignment Test

6. Click the Add button
7. Click Done.

The screen defaults to the Groups list.

Elements Tab

The Elements tab displays all the Requests that belong to the Service Request Group. Any Request can be removed from the Group from within this screen.

To remove a Request:

1. Go to Operations > Request Groups
2. Select the Request Group # link
3. Move to the Elements tab
4. Select the checkbox of the relevant Request

Service Request Group - New Employee

Details Analysis Elements

Remove PDF Excel Display: 25

Request #	IP	Created	Status	Priority	Item Type	Technician	Team	Customer	Group	Subject
<input checked="" type="checkbox"/> 1000435		03/19/12 16:23	Open	Medium	Directory Services	System User	Service Request Team	Lena Benson	New Employee	Create a User Account on the Authentication Server
<input type="checkbox"/> 1000436		03/19/12 16:23	Open	Low	Email Service	Calvin Johns	Service Request Team	Lena Benson	New Employee	New Email Account
<input type="checkbox"/> 1000438		03/19/12 16:23	Open	Low	Desktop Management	Mary Calder	Service Request Team	Lena Benson	New Employee	Ensure Desktop and Telephone availability for new staff member

1 - 3 of 3 Results

Done

5. Click the Remove button.

Merging Service Request Groups

Existing Service Request Groups can be merged within the Request Groups tab, to allow all related Requests within the Groups to be managed as one. To combine Requests Groups:

1. Go to Operations>Request Groups
2. Check the fields next to the relevant Group #'s
3. Click Merge

The screen defaults to the Details tab for the Merge Group.

4. Set the Name, Item Type, Classification, Priority and Description that best defines all associated Service Requests

5. Click Save.

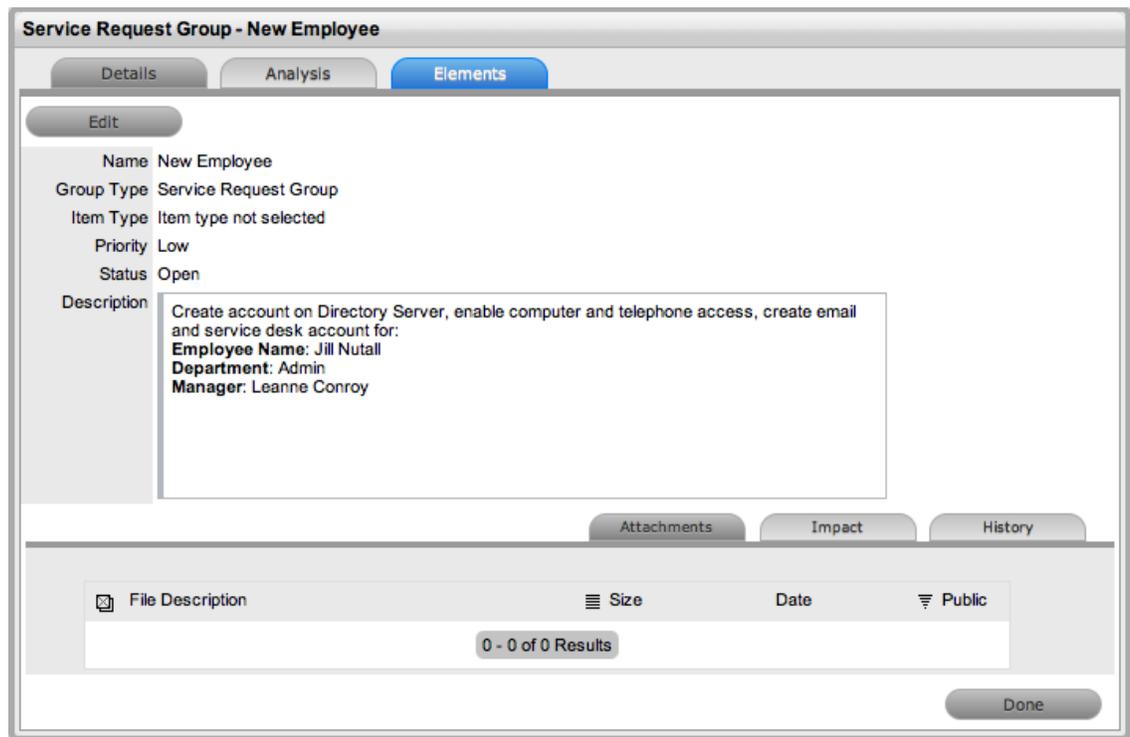
The History tab records details of the Groups merged to form the new Group. Click the No. hyperlink to view the details. The Impact tab records the Type and Number of requests associated with the Group.

Closing a Request Group

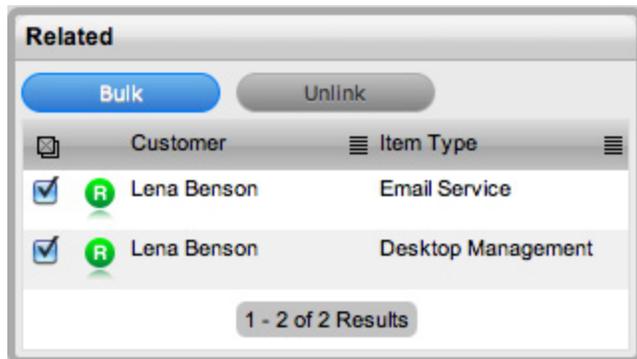
A Request Group is automatically closed when all Requests included in the Group are closed.

To close a Group:

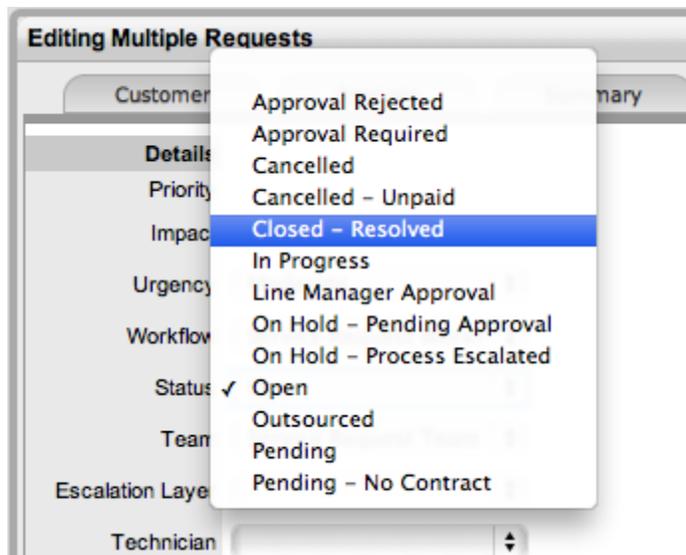
1. Go to Operations>Request Groups
2. Select the Service Request Group # link
3. Move to the Elements tab



4. Select a Request # hyperlink
The Summary tab of the Request is displayed.
5. Click Edit
6. Within the Related sidebar check all related Service Requests



7. Click the Bulk button
The Bulk Editor screen is displayed
8. Select the Status of Closed - Resolved
Or, the relevant Exit State



9. Click Save
10. Click Save and Done.
The Details tab of the Group now displays a Status of Closed - Resolved.

Duplicated Service Requests

When a Service Request is duplicated, the new Request is linked to the original Request creating a Request Group. Requests can be unlinked through the Group's Elements tab.

- ◆ [Grouping Service Requests](#)
- ◆ [Multi Item Requests](#)

2.4.2 Incident Management

- ◆ [“Implementing Incident Management” on page 284](#)
- ◆ [“Incidents” on page 286](#)
- ◆ [“Incident Groups” on page 347](#)

The function of the Service Desk is to act as the point of contact between customers of IT services (end users) and the IT service provider (IT department). Its role is to handle all requests for service, including Incidents, and provide an interface for other activities such as Request Fulfillment, Change, Problem and Configuration Management.

An Incident is defined as any event that is not part of the standard operation of a service, and causes, or may cause, an interruption to, or a reduction in the quality of service. The goal of Incident Management is to restore normal service as quickly as possible, with minimal disruption to the business. This ensures that the highest achievable levels of availability and service are maintained.

Incident Management objectives include:

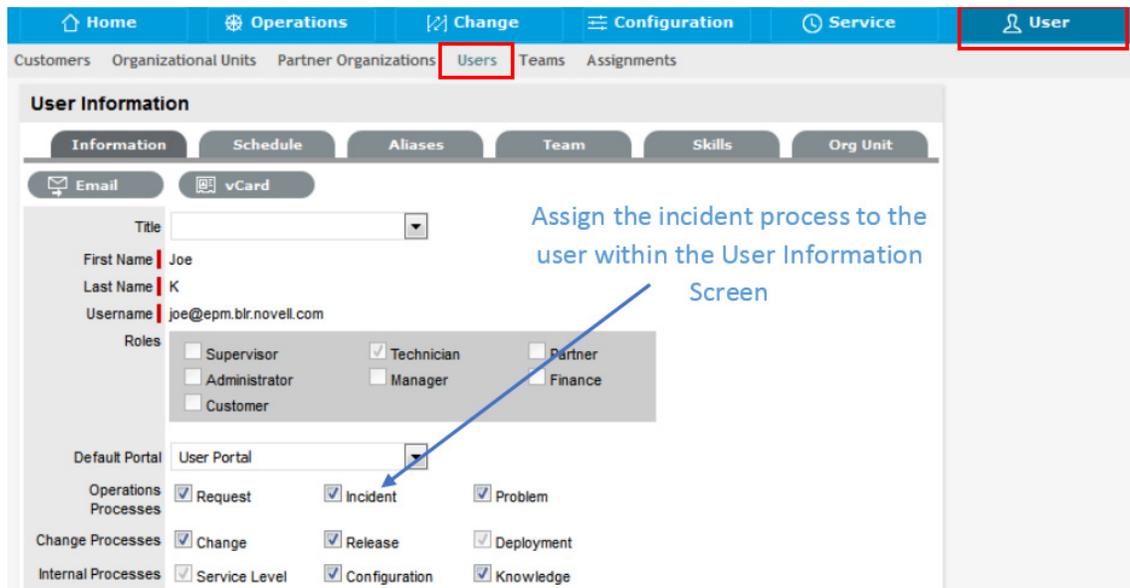
- ◆ Incident detection and recording
- ◆ Classification of all Incidents and initial support
- ◆ Investigation and diagnosis
- ◆ Escalation
- ◆ Resolution and recovery
- ◆ Incident closure
- ◆ Incident ownership, monitoring, tracking and communication.

As part of the Incident Management Process, if an Incident is related to a Problem or Change Request and that related request in the other Process is closed, the Incident will be automatically closed. The system views the request hierarchy from low to high as Service Request, Incident, Problem and Change Request, and if a related request of a higher type is closed, all the lesser type requests are automatically closed

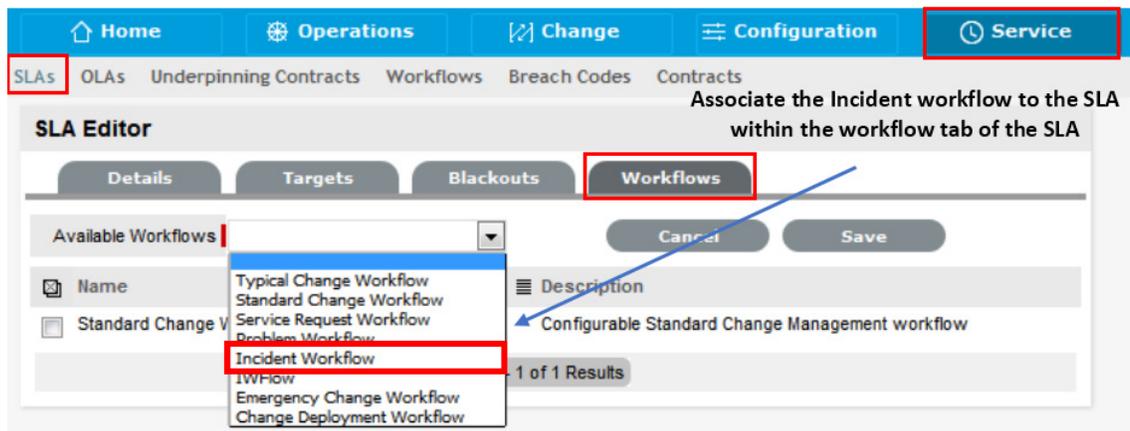
Implementing Incident Management

To set up the Incident Management Process in the system, the following steps are to be completed:

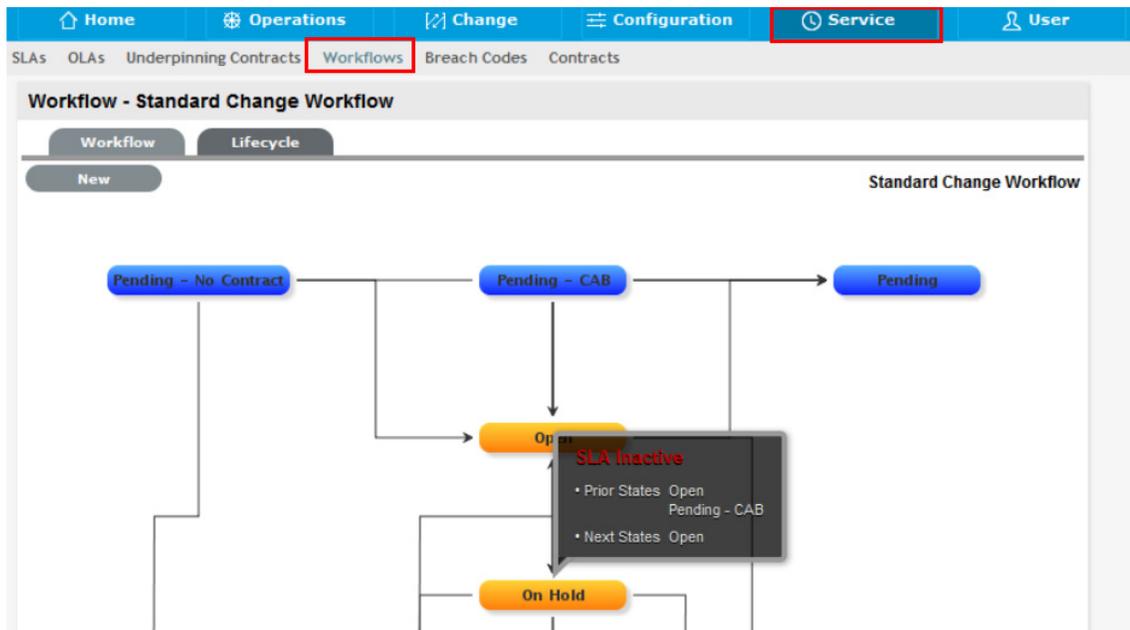
1. Assign the Incident Management Process to the relevant Users within the User Information screen under the User>Users tab. (See:[Create a User](#).)



2. Create or review the SLA within the Service>SLAs tab, and associate the Incident Management Workflow to the SLA in the SLAs Workflow tab. (NB: The Supervisor User setting up the SLA must be assigned the Internal Process of Service Level in their User Information screen to complete this action.)



3. Review the Incident Management Workflow within the Service>Workflows tab. (See: [Incident Management Workflow](#).)



4. Edit the Default Incident Management Team within the User>Teams screen. (See: [Incident Management Team](#).)

The screenshot shows the 'Team Information' form for the 'Device-Incident Team'. The form is divided into three tabs: 'Information', 'Service', and 'Layers'. The 'Information' tab is active, showing details like Team Name, Process, Team Lead, and various notification settings. The 'Layers' tab is highlighted with an annotation: 'Create escalation layer in the Layers tab'. The 'Service' tab is also highlighted with an annotation: 'Create default workflow in the Service tab'. The 'Location' section includes fields for Address, City, State, Zip, Country, and Phone.

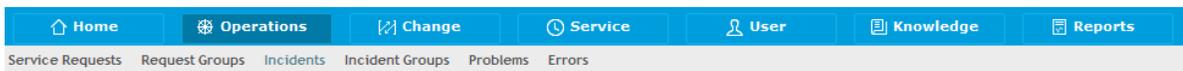
5. Associate the SLA to an Item or Customer or Org Unit. This final step ties all the elements together when an Incident is created, as the SLA associated with the Item, Customer or Org Unit assigned to the Incident determines the Workflow, Team and Technicians that are made available within the Incident Information screen.

Incidents

- ◆ “Creating an Incident:” on page 289
- ◆ “Incident Queue” on page 289
- ◆ “Incident Search Tips:” on page 289
- ◆ “RSS Feeds” on page 289
- ◆ “Create an Incident for an existing Customer” on page 290

- ◆ “Create an Incident for a new Customer” on page 290
- ◆ “Incidents for Partner Organization Customers” on page 291
- ◆ “Supported Org Units Only option” on page 292
- ◆ “Customer Tab” on page 293
- ◆ “Quick Calls” on page 295
- ◆ “Contract Tab” on page 297
- ◆ “Details Tab” on page 297
- ◆ “Request Subject” on page 298
- ◆ “Analysis Tab during Incident Creation” on page 299
- ◆ “Proactive Solution Analysis” on page 300
- ◆ “Workarounds” on page 300
- ◆ “Analysis” on page 300
- ◆ “Searching for a Solution” on page 300
- ◆ “Proactive Analysis during Incident Creation” on page 302
- ◆ “Converting an Incident to a Service Request” on page 304
- ◆ “Linking requests” on page 304
- ◆ “Creating a Problem or Change Request within an Incident” on page 305
- ◆ “Creating an Alert” on page 305
- ◆ “Article Button” on page 306
- ◆ “Remove Button” on page 307
- ◆ “Workaround Article” on page 307
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- ◆ “Requests Tab” on page 310
- ◆ “Summary Tab” on page 310
- ◆ “Notes Tab” on page 317
- ◆ “Attachments Tab” on page 322
- ◆ “Impact Tab” on page 323
- ◆ “Audit Tab” on page 327
- ◆ “Related Requests” on page 330
- ◆ “Closing Incidents within Groups” on page 332
- ◆ “Status” on page 333
- ◆ “Updating an Incident's Status” on page 334
- ◆ “Incidents with a Pending-No Contract Status” on page 335
- ◆ “Viewing a Status Note” on page 335
- ◆ “SLA Triggers and Incident Status” on page 335
- ◆ “Priority” on page 336
- ◆ “Setting Incident Priority” on page 336
- ◆ “Incident Assignment and Escalation” on page 337
- ◆ “Incident Assignment” on page 337
- ◆ “Automated Escalation” on page 338

- ◆ “Manual Escalation” on page 338
- ◆ “Escalation Control” on page 338
- ◆ “Workflow” on page 340
- ◆ “Moving through the Workflow” on page 340
- ◆ “Assigning a State with an Underpinning Contract” on page 341
- ◆ “OLA Status Due” on page 342
- ◆ “Team Assignment during the Workflow Lifecycle” on page 342
- ◆ “Pending - No Contract Status” on page 342
- ◆ “Entering a Request via Email” on page 343
- ◆ “Grouping Incidents” on page 344
- ◆ “Grouping Incidents” on page 345
- ◆ “Billing/Contracts” on page 347



Incidents are requests raised for Customers, or raised by a Customer through the Customer Portal. An Incident is raised against a Configuration Item (Item), which may also be a Service, within the system. Incidents are assigned to Technicians and are escalated according to the Service Level Agreement (SLA) applied to the Incident.

The Operations>Incidents view defaults to display All Incidents logged within the system irrespective of Incident Status. Available Incident Filters include:

Filter	Description
All Incidents	Displays all Incidents logged in the system regardless of their Status or Assignment.
Incident Queue	Displays Incidents assigned to the System User by default, which Technicians can reassign after viewing. (This is only available if the functionality is enabled for the system and Team.)
My Incidents (Active)	Displays all Incidents in an active Workflow State that are assigned to the logged-in User.
My Incidents (All)	Displays all Incidents, in active and inactive Workflow States, that are assigned to the logged-in User.
My Teams Incidents (Active)	Displays all Incidents in an active Workflow State, allocated to the Teams with which the User is associated.
My Teams Incidents (All)	Displays all the Incidents, in active and inactive Workflow States, allocated to the Teams with which the User is associated.

The default display is ten Incidents per batch. The list can be re-sorted by clicking on a column header, and the number of Incidents displayed per batch can be altered using the Display pop-up option.

Creating an Incident:

To create an Incident within the system, the following information is required:

- ♦ [Customer Details](#)
- ♦ [Item Details](#)
- ♦ [Contract Details](#)
- ♦ [Incident Classification and Description.](#)

Incident Queue

Incidents that are created by Customers through the Customer Portal or via email, can be forwarded to a holding bay or queue, if this functionality is required by the Service Desk. The capability can be enabled system-wide but applied on a per Incident Team basis, as needed.

When an Incident is assigned to the Queue, the name applied in the Technician field is System User.

Incident Search Tips:

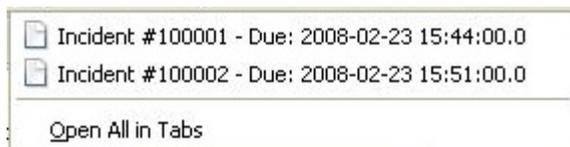
- ♦ The Incident search option has a default Status to search only Active Incidents. To ensure search success, select the relevant Incident Status, if unsure, select All
- ♦ To search for multiple Incident numbers at once, insert a comma separator between Incident numbers
- ♦ To search based on an Incident status, select the Incident Workflow option from the Workflow drop-down list
- ♦ To search by Classification, select an Item Category from the Category drop-down list. After the Category is applied, a list of Classifications is displayed
- ♦ To search based on the content of an Incident Description, select the Full Text option within the Search screen and enter a relevant term (See: [Full text searches.](#))
- ♦ To search using an Item's Custom field information, select the Item Category to display any Custom Fields configured for that Item.

NOTE: For information regarding request assignment, reviewing a request, adding notes or updating the status, refer to [Working on a Request](#).

RSS Feeds

To easily access up to the minute details regarding Incident activity within an RSS feed browser bookmark, Users can subscribe to RSS feeds by selecting the RSS button within the Incident list. When the RSS button is selected, Users are presented with the application options for subscribing to receive the information and where the Recent Activity information is to be accessed. To readily access the information through a browser window, save the feed to the Bookmark Bar.

The following is an example of the information obtained by clicking on the RSS bookmark:

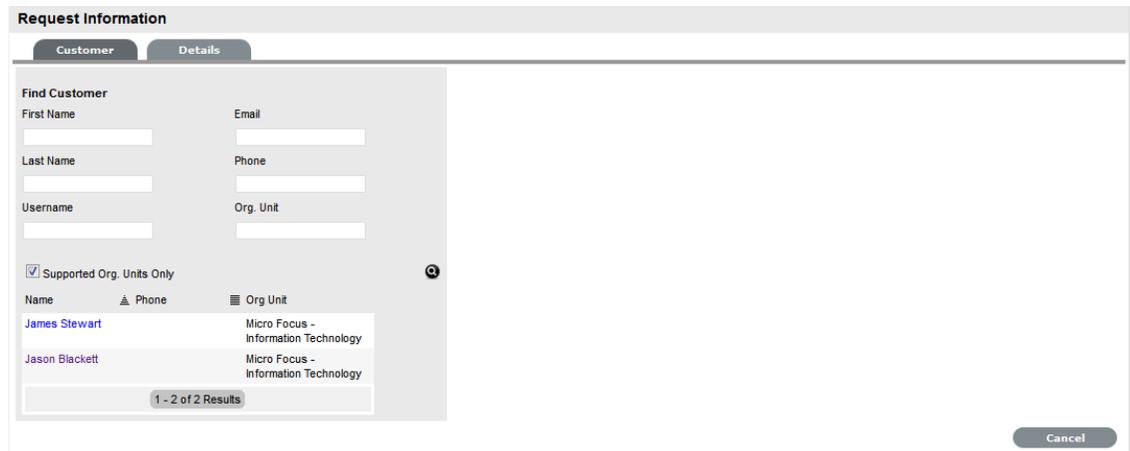


Create an Incident for an existing Customer

To search and assign a Customer who already exists in the system:

1. Go to Operations>Incidents
2. Click New
3. Search and select a Customer

Within the Find Customer field, enter any known Customer details or leave the search fields blank to access the complete Customer list. If Custom Fields have been enabled in the Customer Information screen, the Advanced Search option can be used to search on data recorded within these fields.



The screenshot shows the 'Request Information' screen with the 'Customer' tab selected. The 'Find Customer' section contains search fields for First Name, Last Name, Username, Email, Phone, and Org. Unit. A search button with a magnifying glass icon is present. Below the search fields, a table displays search results for 'James Stewart' and 'Jason Blackett', both associated with 'Micro Focus - Information Technology'. A 'Cancel' button is located at the bottom right of the screen.

4. Click  to search the Customer database
5. Select the relevant Customer Name hyperlink to assign the Customer details to the Incident.
The screen will open the Find Item field.

See: [Advanced Search Options](#).

Create an Incident for a new Customer

If the Customer does not exist within the system, an account can be created when entering the Incident:

1. Select Incident>Incident
2. Click New
3. Within the Find Customer field, select 
An expanded editable Customer details form is displayed.
4. Enter the Customer details
5. Click Save.

The form will revert to a non-editable screen of the newly entered details and display the [Items Tab](#).

Incidents for Partner Organization Customers

NOTE: When an Incident is created for a Customer of a Partner Organization it is automatically allocated to the Partner User associated with the Partner Organization.

Customers can be assigned to a Partner, in one of two ways:

1. When a Partner logs in and creates a new Customer, the Customer is automatically assigned to that Partner

- When the Administrator option Edit Customer Partner is enabled, and the Partner is assigned to the Customer within the Customer Information screen of the User > Customers tab.

Customer Information

Contact Aliases Items Requests Contracts

Email vCard Ashley Adam

Access

Title
 First Name
 Last Name
 Username
 Password
 Web access Enabled Disabled

Contact

Primary Email
 Send To
 Org. Unit

 Line Manager

 Address 1
 Address 2
 City
 Zip
 Country
 Email Locale
 Phone
 Fax
 Pager
 Mobile (Required for SMS)
 SMS Override Override Address?

Roles

Current Administrator Supervisor
 Manager Technician
 Finance Partner
 Customer

Default Portal

Details

Custom 1
 Notes

Partner

Customer of
 Locale
 Time zone
 Last Login

Partner Organisation associated with a Customer within this field

Supported Org Units Only option

This option is visible within the Find Customer search field, if the logged in User has been assigned to support specific Organizational Units. Uncheck the option, if search results are to include Customers belonging to all Organizational Units recorded in the system.

Find Customer

First Name	Email
<input type="text"/>	<input type="text"/>
Last Name	Phone
<input type="text"/>	<input type="text"/>
Username	Org. Unit
<input type="text"/>	<input type="text"/>

Supported Org. Units Only 

Customer Tab

The first step in creating a new Incident requires a Customer be assigned to the Incident. There are two ways to assign a Customer to an Incident, either search and select an existing Customer, or create a new Customer.

Item Information

After the Customer details are assigned to the Incident, an Item or Items are assigned to the Incident. This assignment associates all the relationships of the Item(s), including Service Level Agreements and assigned support Teams to the Incident.

When creating an Incident, if the Customer assigned to the Incident owns any Items they will be listed below the Find Item search box. By default, the list is defined by the All Assigned Items option. It is also possible to search by:

- ◆ All Items
(Only visible if the Search All Items option is enabled within Admin>Setup>Privileges>User tab.)
- ◆ All Assigned Items (Customer and Organization Unit)
- ◆ Assigned Items by Customer
- ◆ Assigned Items by Organizational Unit.

Request Information

Customer | **Details**

Customer

Title

Name James Stewart

Org. Unit Micro Focus - Information Technology

Room

Email james@nsd.com

Phone

Mobile

Fax

Pager

Address 1

Address 2

City

State

Zip

Country

Find Item

Item Number

Item Type

Include Global* Items

Active Items Only

Item Type

All Items

All Assigned Items

By Customer

By Org. Unit

Category

Mobile Devices

Advanced Search

Field Value

Memory Card

IMEI Number

Item #	Item Type	Identifier	Status
Service Desk	Service Desk		Available
Wifi Service	WiFi Service	Type:	Available

1 - 2 of 2 Results

Cancel

The list can be filtered using the Include Global* Items option. This will display Items that are available to all Users in the system, as they have not been assigned to a specific Customer or Organizational Unit. It can also be filtered using the Active Items Only option, which means only Items that are assigned an active lifecycle state are displayed if the option is checked.

Multi-Item Requests

The system also allows for multiple Items to be assigned to a request during the Incident creation process, if relevant. This results in separate Incidents being created for each Item assigned to the initial Incident, which are then displayed within the Related Requests window within the Incident Information screen.

The requests are managed as individual Incidents to cater for any special requirements relative to each Item. For example, consider a situation where a Team rolls-out an update in an organization. In this instance, during the Incident creation process multiple Items are assigned to a single Incident, which the system automatically allocates to separate Incidents that are then managed on an individual basis. This allows appropriate Teams/ Technicians to be assigned to the Incidents relative to their skill-set or departmental assignments. The implementation process more effectively differentiates between the tasks and Items being modified and ensures each Item has its own Audit Trail, Attachments and Notes for future reference.

Multi-Item Requests are listed as separate Incidents within the Incidents List View, and can be accessed as a group within the Incidents Groups List View.

Incident Item Assignment

To assign an Item to the Incident:

1. Click the relevant Item link if listed below the Find Item search box

Or, click to [Search for an Item](#) or click to [Create an Item](#).

NOTE: The option to create an Item is only available to Technicians if the system Administrator has enabled the Create Items option within the Setup>Privileges>User screen.

Request Information

Customer Details

Customer	Item
Title	Item Number 100003
Name Francis Young	Category Service
Org. Unit MyCompany - Azure	Item Type Email Service
Room	Identifier
Email francis@	Team Incident Team
Phone	Room
Mobile	Service Gold
Fax	
Pager	
Address 1 Suite 7	
Address 2 75 No Way	
City Beautiful	
State Victoria	
Zip 3907	
Country Australia	

Cancel Add Next

1. Click Next to move to the Details tab if only one Item is to be assigned to the Incident

Or, select Add to assign additional Items. If Add is selected, a Selections window will be displayed that lists all the current Items assigned to the request.

Selections

Customer	Item No.	Item Type
James Stewart	Wifi Service	WIFI Service

1 - 1 of 1 Results

2. Continue to add all the relevant Items to the Incident and then select Next to move to the Details tab.

Within the Details tab the Incident is profiled by assigning a Classification and Incident Description.

Quick Calls

Quick Calls are used for common requests that are logged using a template during the Incident creation process.

If the Quick Call functionality is enabled for the system, after the Customer and if relevant, Item details are assigned to an Incident, within the Details tab the Quick Call options are displayed below the dashed line in the Request Type drop-down list.

Quick Calls and Item Assignment

If the Item is to be assigned to the Incident using the Quick Call Template configuration, the User simply selects the Next button after assigning the Customer information to the Incident. The application moves to the Details tab and within the Request Type options, the list displayed only includes Templates that have Items preset.

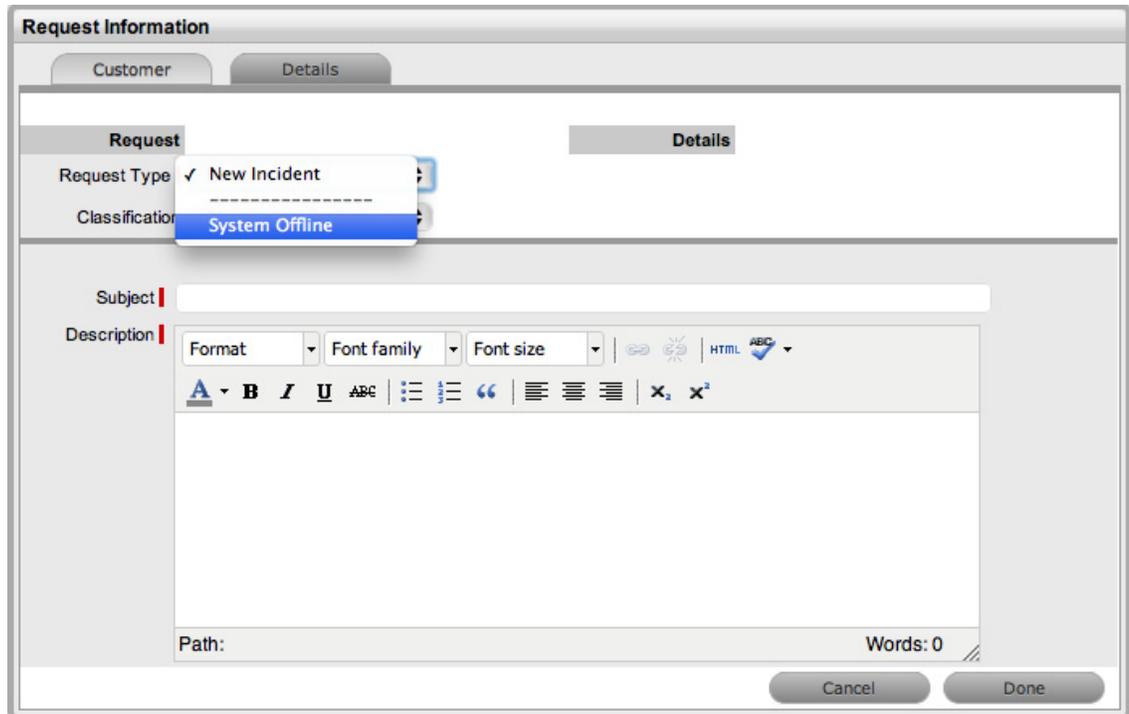
NOTE: The Next button will only be visible after the Customer has been assigned to the Incident, if Quick Call templates that have Items assigned are configured in the system.

If a specific Item is associated with the Quick Call Request within the Customer tab, the options displayed within the Request Type drop-down list will include Quick Call templates associated with the Item already assigned to the Incident, and templates assigned the Unknown Item.

For Incidents created with multiple Items assigned that use different Items, Quick Call templates with no Items assigned are displayed. For Incidents where the same Item is assigned on multiple occasions, Quick Call templates that have the matching Item and no Items assigned are made available in the Request Type drop-down list.

To create an Incident using a Quick Call:

1. After allocating a Customer and Item(s) if required, click Next to move to the Details tab
2. Within the Request Type drop-down list, select the relevant Quick Call template displayed below the dashed line



The screenshot shows a 'Request Information' dialog box with two tabs: 'Customer' and 'Details'. The 'Details' tab is active. Under the 'Request' section, the 'Request Type' dropdown menu is open, showing 'New Incident' (selected) and 'System Offline' (highlighted). Below the dropdown is a dashed line. The 'Classification' field is empty. The 'Subject' field is empty. The 'Description' field has a rich text editor with a toolbar containing 'Format', 'Font family', 'Font size', 'HTML', 'ABC', 'A', 'B', 'I', 'U', 'ABC', 'List', 'List', 'Quote', 'List', 'List', 'List', 'x', 'x²'. The 'Path' field is empty and the 'Words' count is 0. 'Cancel' and 'Done' buttons are at the bottom right.

3. Assign a Classification
4. Click Done.

All Incident details will be populated according to the Quick Call template. Any amendments can be made through the Incident Summary screen.

NOTE: When saved, the Incident created using the Quick Call template can be duplicated to minimise data entry requirements for multiple similar Incidents.

Contract Tab

When Contracts are enabled for the system, the Contract tab is visible within the Incident Information screen.

The Contract tab of an Incident includes the details of the Contract Type and SLA assigned to the Incident. If a valid contract is active for the Customer, Item or Organizational Unit assigned to the Incident, then the details of the contract will be displayed. If an SLA is not assigned to the Customer, Item or Org Unit and the Billing functionality is not enabled, the system automatically applies a default SLA based on the Item Type or the system default SLA.

Priority	Response Time	Restoration Time	Resolution Time	24 x 7 support	Alert
Urgent	6 Hours	12 Hours	24 Hours	No	Action
High	12 Hours	24 Hours	48 Hours	No	Action
Medium	18 Hours	36 Hours	72 Hours	No	Action
Low	24 Hours	48 Hours	96 Hours	No	Action

When Billing is enabled and the Contracts or Invoices functionality is active, the system verifies the service entitlement status of the Customer assigned to the Incident, and if a valid contract is not in place, the Incident is assigned a status of Pending-No Contract and locked until a valid contract is associated with the Incident. The Customer is automatically sent the NoContractCreateRequestSummary email when the request is saved with this Status.

Incident
Team Device-Incident Team
Workflow Incident Workflow
Status Pending - No Contract

A reminder email can be sent to the assigned Customer by the Technician from within the Summary tab by clicking .

For more detailed information about contracts and billing, see [Contracts](#).

Details Tab

To successfully create an Incident, the Incident must be profiled by completing the Request Type, Classification and Description details. Within the Details tab, there is also the option to select any relevant Quick Call Templates that have been configured for the Item Type assigned to the Incident.

Entering an Incident Description

To profile the Incident:

1. Define the Request Type

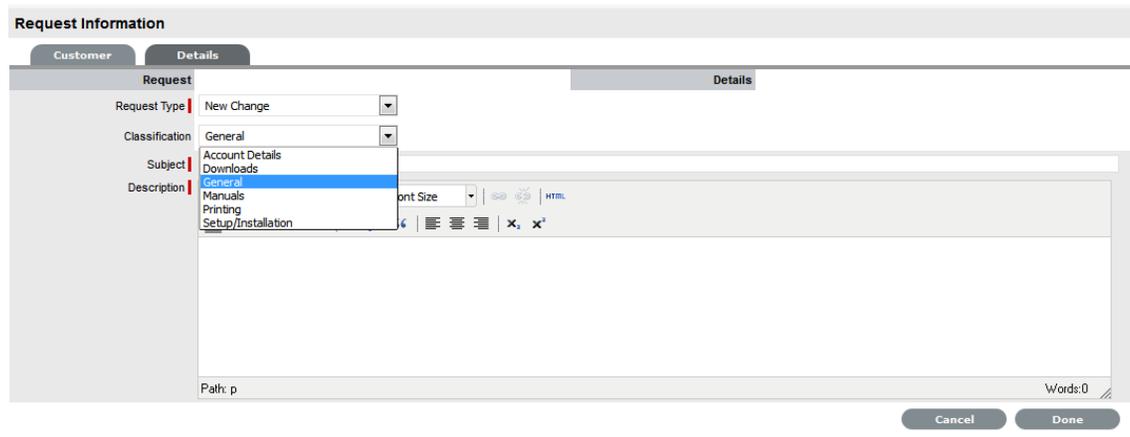
The New Incident option is locked in if there are no Quick Call templates available for the Item or Process.

2. Select a Classification

If multiple Items are assigned to the Request, the option to assign a specific Classification for each Item Request is provided.

3. Complete any required Custom Fields

4. Define the Subject content, if desired



The screenshot shows a 'Request Information' dialog box with two tabs: 'Customer' and 'Details'. The 'Request' tab is selected. The 'Request Type' is set to 'New Change'. The 'Classification' is set to 'General'. The 'Subject' field is empty. The 'Description' field is open, showing a list of categories: 'Account Details', 'Downloads', 'General', 'Manuals', 'Printing', and 'Setup/Installation'. The 'Description' field is empty. The 'Path' is 'p'. The dialog box has 'Cancel' and 'Done' buttons at the bottom right.

5. Enter all relevant information within the Description field

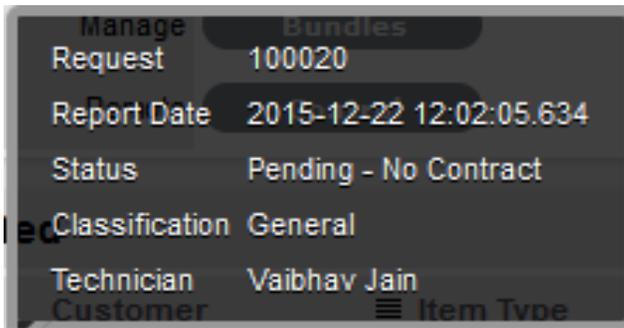
This is a mandatory field.

6. Click Done to enter the new Incident into the system.

A unique reference number is generated automatically for the request at this point. When an Incident is submitted successfully, the Incident Summary Tab is displayed. If the Force Analysis functionality is enabled in the application's Setup, the system will move to the Analysis Tab.

Request Subject

It is recommended that a summary be included in the Subject field, as the details recorded in the Subject field are displayed in scroll-over summaries throughout the application. For example, when a new Incident is being entered for a Customer, a Recent Customer Requests list is displayed during the Incident creation process for all Items the Customer owns either directly or via shared ownership. The Requests list includes a scroll-over summary where Subject content is displayed, if the Subject is completed for a request. Subject information can also be included within a column in the Incidents List View, for a quick glance summary of an Incident.



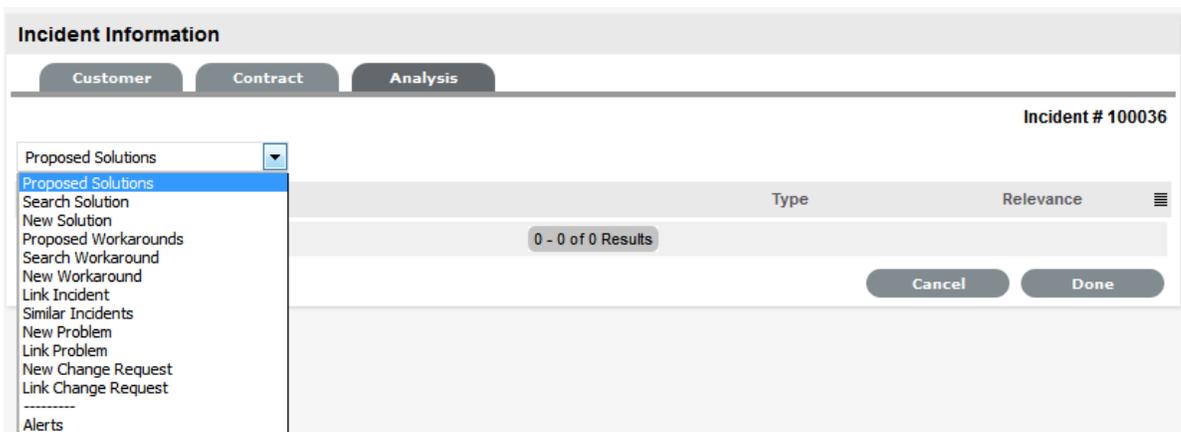
NOTE: The system Administrator can make the Subject field mandatory by enabling the Subject Required option in the Setup>Privileges>User tab.

Analysis Tab during Incident Creation

When the Force Analysis option is enabled by the Administrator, the Analysis tab is automatically displayed after the Description is entered during the Incident creation process. Within this tab the User can:

- ◆ Create or search for a Solution
- ◆ Create or apply a Workaround
- ◆ Link the Incident to other requests prior to saving the Incident
(This option is not available to Incidents created with Multiple Items assigned during the Incident creation process.)
- ◆ Create an Alert related to the Incident.

NOTE: To include analysis during Incident creation, ensure the Administrator>Setup>Privileges>Requests>Force Analysis option is set to Yes.

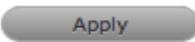


If analysis is not required during the request creation process, click Done to continue to the Summary tab.

Proactive Solution Analysis

During Incident creation after the Incident Description is completed, the system automatically searches the Knowledge Base for possible Solutions that may be related to the Incident. This search is based on the Item Type, Classification and text matching of existing Articles with the Incident Description content. Proposed Solutions will be visible when the Proposed Solution filter is selected within the Analysis tab.

To assign a proposed Solution to an Incident:

1. Select the Article ID number
2. Click  to assign the Solution or select Cancel to revert to the Proposed Solution list.

If the Resolved option is selected, the Incident is automatically closed and the selected Article is assigned as the Solution.

Workarounds

A Workaround is a temporary fix applied to an Incident or Problem when a full resolution is not yet available.

To assign a Workaround to an Incident, the User can apply a Proposed Workaround presented by the application or use the Search Workaround facility. If a Workaround Article does not exist, a Workaround can be created within this screen. Once a Workaround is applied to the Incident it can be viewed in the Analysis tab under the View Workaround option.

Analysis

The Analysis tab is used to search for Solutions, Workarounds or to relate the current Incident with other requests. It also allows the User to convert an Incident, logged against a Service Item, to a Service Request.

To assign a Solution to the Incident, the User can apply Proposed Solutions presented by the application or use the Search Solution facility. If a Solution Article does not exist, an Incident solution can be created within this screen. Once a Solution is applied to the Incident, the application automatically closes the Incident.

Searching for a Solution

To Search for a Solution:

1. Click on the number of the required Incident
The Incident Information screen appears.
2. Select the Analysis tab
3. Click Edit
The drop-down list will become active.

Incident Information

Customer Analysis Summary

Incident # 100041

Proposed Solutions

Article No.	Summary	Type	Relevance
3	Storage quota	Article	100%
1	The service desk will verify your storage quota, and if relevant increase it.	Article	86%

1 - 2 of 2 Results

Cancel Done

4. Select from the available options, as follows:

Analysis Tab Drop-down Options

Proposed Solution	Displays a list of all solutions with a search based on Incident Description, Item Type and Classification. To assign a Solution, select the Solution ID number to display the solution in full. Click Resolve if the Solution is relevant. This will close the Incident and update the Customer.
Search Solution	Allows Users to enter full text or ID number to search for possible Solution Articles. To assign a Solution, select the Solution ID number to display the Solution in full. Click Resolve if the Solution is relevant. This will close the Incident and update the Customer.
New Solution	Displays Knowledge Base editor to allow the User to enter a new Solution. Solution Articles are used as Proposed Solutions for future Incidents. See: Solution Article .
Convert to Service Request	Allows the User to make the current Incident a Service Request and maintain the current identification number for Customer correspondence purpose, while recording the action in the Audit Trail.
Proposed Workaround	Displays a list of all Workarounds with a search based on Incident Description, Item Type and Classification. To assign a Workaround, select the Workaround ID number to display the Workaround in full. Click "Apply" if the Workaround is relevant.
Search Workaround	Allows User to enter full text or ID number to search for an existing Workaround Article. To assign a Workaround, select the Workaround ID number to display the Workaround details. Click "Apply" if the Workaround is relevant.
New Workaround	Displays Knowledge Base editor to allow the User to enter a new Workaround. Workaround Articles are used as Proposed Workarounds for future Incidents.
Alerts	Shows details of the Alerts that have been created within the Incident.

5. Click Save.

Proactive Analysis during Incident Creation

During Incident creation after the Incident Description is completed, the system automatically searches the Knowledge Base for possible Solutions or Workarounds that may be related to the Incident. This search is based on the Item Type, Classification and text matching of existing Articles with the Incident Description content. Proposed Solutions or Workarounds are visible when the Proposed Solutions or Proposed Workarounds filter is selected within the Analysis tab.

To assign a proposed Solution or Workaround to an Incident:

1. Select the Article ID number

The system will display the Solution or Workarounds details screen.

Customer Analysis Summary

Edit Incident # 100041

Flags

ID 1
Type Article
Visibility Technicians & Customers
Status Published
Item Category Service
Classification Permission Denied
Review Date

Item Types

Email Service

Content

Title Not able to send or receive email
Summary The service desk will verify your storage quota, and if relevant increase it.
Content The service desk will verify your storage quota, and if relevant increase it.
Please be sure that all emails stored on the server are relevant, and delete any unwanted accounts before following up.

Created 05/03/11 00:29
Revised 05/05/11 19:16
Direct Link <http://localhost:8080/LiveTime/WebObjects/LiveTime.woa/wa/LookupArticle?articleId=1>

Statistics Views:1 Last:05/05/11 23:29 Votes: Rating:

Related Attachments History

File Description Size Date Public

0 - 0 of 0 Results

Apply Cancel

2. Select the Apply button.

The Incident is automatically closed when a Proposed Solution is applied. When a Proposed Workaround is applied the Incident status remains unchanged.

Converting an Incident to a Service Request

An Incident that has been logged against a Service Item, can be converted to a Service Request within the Analysis tab. This action results in the Service Request maintaining the same request identification number and audit trail, which records the conversion.

To convert an Incident logged against a Service Item to a Service Request:

1. Select Edit within the Analysis tab
2. Select the Convert to Service Request option.

The Incident ID # is associated with a new Service Request and the Request is assigned the Entry State of a relevant Service Request Workflow. The audit trail of the Service Request records the conversion time and date. The customer is not notified about the Process amendment.

Linking requests

Within the Analysis tab, Incidents can be linked to other Incidents within a pre-existing Incident Group, or linked with existing Problem and Change Groups. A new Problem or Change Request can also be automatically created and associated to the Incident within this Tab.

Link with other requests

Link Incident	Allows User to enter full text or ID number to search on Incidents. Select an Incident ID number to immediately link the current Incident to a Grouped Incident.
Similar Incidents	Displays similar Incidents based on Item Type, Classification and Description.
New Problem	Allows the User to create a new 'Problem Group' that links the Problem and Incident to the new Group. The Incident status will move to 'On Hold - Process Escalated'.
Link Problem	Allows User to enter full text or ID number to search on Problems. Select an Problem ID number to immediately link the current Incident to a Problem Group.
New Change Request	Allows the User to create a new 'Change Group' and links the RFC and Incident into the new Group. The Incident status will move to 'On Hold - Process Escalated'.
Link Change Request	Allows the User to enter full text or ID number to search on Change Requests. Select a Change Request ID number to immediately link the current Incident to a grouped Change Request.
Alerts	Allows the User to create an Alert directly related to the Incident. Displays any reminder alerts that have been created in the Summary tab of the Incident. Select the Alerts option to view Alerts list, and click on an Alert Publish Date to view Alert Content.

To link an Incident to a Group within the Analysis tab:

1. Select Edit

The drop-down list becomes available.

2. Search for a request Group using full text or ID number
3. Select the relevant search result ID number.

This automatically adds the current Incident to the existing Group.

Creating a Problem or Change Request within an Incident

An Incident can prompt the creation of a Problem or RFC within the Analysis tab. This will move the current Incident status to On Hold - Process Escalated, and link it to the new Problem or Change Request group.

To escalate an Incident to another Process:

1. Select Edit within the Analysis tab
2. Select the New Problem or New Change Request option.

The Incident is automatically escalated and its status changed to On Hold - Process Escalated.

NOTE: When the related Problem or Change is moved to an Exit State, the Incident is automatically moved to the default Exit State, if not already closed.

Creating an Alert

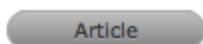
To create an Alert that is associated with the Incident, within the Analysis tab:

1. Select Edit within the Analysis tab
2. Select the Alerts option in the drop-down list
The New button is made accessible.
3. Click New
4. Refine the content for each required field:

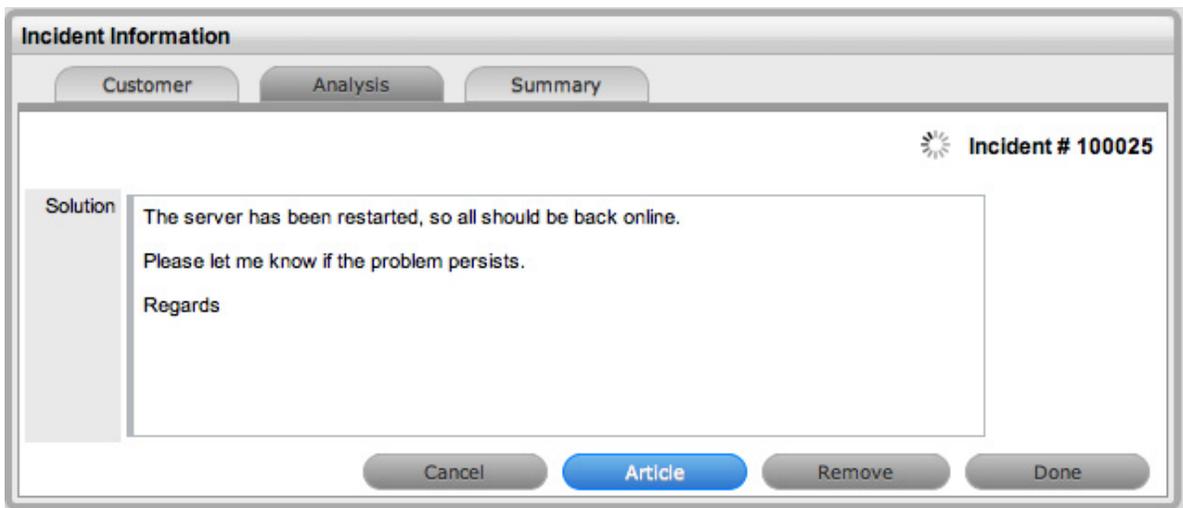
Alert Details	Description
Created	The current date and time.
Publish	The date the Alert is published. Use the calendar icon to the right of the field, to select a Publish date. Set to a date in the future, or use the default to publish the Alert immediately.
Dismiss	The date the Alert ceases to be available. Use the calendar icon to the right of the field, to select a Publish date. On this date, the Alert will disappear from a User's Alert list.
Severity	The type of Alert to be published. The choices are: <ul style="list-style-type: none"> ◆ Information – for general Alerts ◆ Warning – to warn Users of potential issues ◆ Urgent – to publish an urgent actionable message. The icon appearing with the message will depend on the type of Alert.
User	The User type to receive the Alert, which include: <ul style="list-style-type: none"> ◆ Specific Customer or User - In the Find User or Customer list, click search to select the recipient from the drop-down list. ◆ User Role - An Alert sent to a User Role will go to all Users with that Role. ◆ Personal Alert - A personal Alert appears on the User's own screen at the Publish date. ◆ Organizational Units - In the Find Org. Unit field, search and select the recipients. ◆ Public - A Public Alert appears when the Public Alert link is selected on the Login Page.
Title	Enter the title of the Alert.
Message	Enter the main content of the Alert.

5. Click Save.

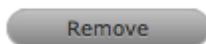
Article Button



When a Solution has been applied or proposed for a request with the Create Knowledge option set to No, the Solution is visible within the Analysis tab and not available within the Knowledge Base. To manually escalate a request Solution to a Knowledge Base Solution Article, with the Analysis tab in Edit mode, select the Article tab.



Remove Button



When a Solution has been applied or proposed for a request, the Solution or Knowledge Base Solution Article is visible within the Analysis tab. To disassociate a Solution from a request, with the Analysis tab in Edit mode, click the Remove button. The Analysis tab will now only display the default drop-down list options.

Workaround Article

Workarounds are temporary fixes applied to a Problem until the Problem is resolved.

To assign a Workaround to a Problem, the User can apply a Proposed Workaround presented by the application or use the Search Workaround facility. If a Workaround Article does not exist, a Workaround can be created within this screen. Once a Workaround is applied to the Problem it can be accessed via the Analysis tab under the View Workaround option.

The Workaround options included in the Analysis tab are:

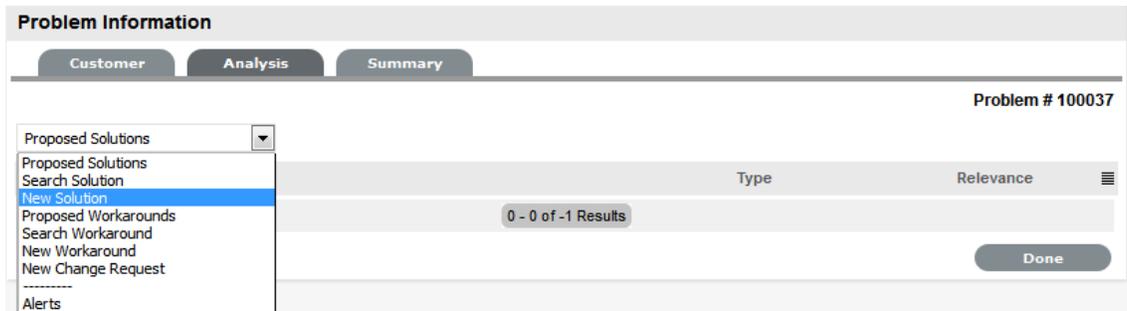
Analysis Tab Options

Proposed Workarounds	Displays a list of all Workarounds with a search based on Problem Description, Item Type and Classification. To assign a Workaround, select the Article number to display the Workaround in full. Click Resolve if the Workaround is relevant. This will assign the Workaround to the Problem. After a Workaround has been assigned, the View Workaround option will become visible within the Analysis options
Search Workarounds	Allows User to enter full text or ID number to search for possible Workaround Articles. To assign a Workaround, select the Article number to display the Workaround in full. Click Resolve if the Workaround is relevant. This will assign the Workaround to the Problem. After a Workaround has been assigned, the View Workaround option will become visible within the Analysis options
New Workaround	Displays Knowledge Base editor to allow User to enter a new Workaround. Define visibility, enter a Summary, a Description and Save.

Creating a Workaround Article

Within a Problem:

1. Select the Analysis tab
2. Click Edit

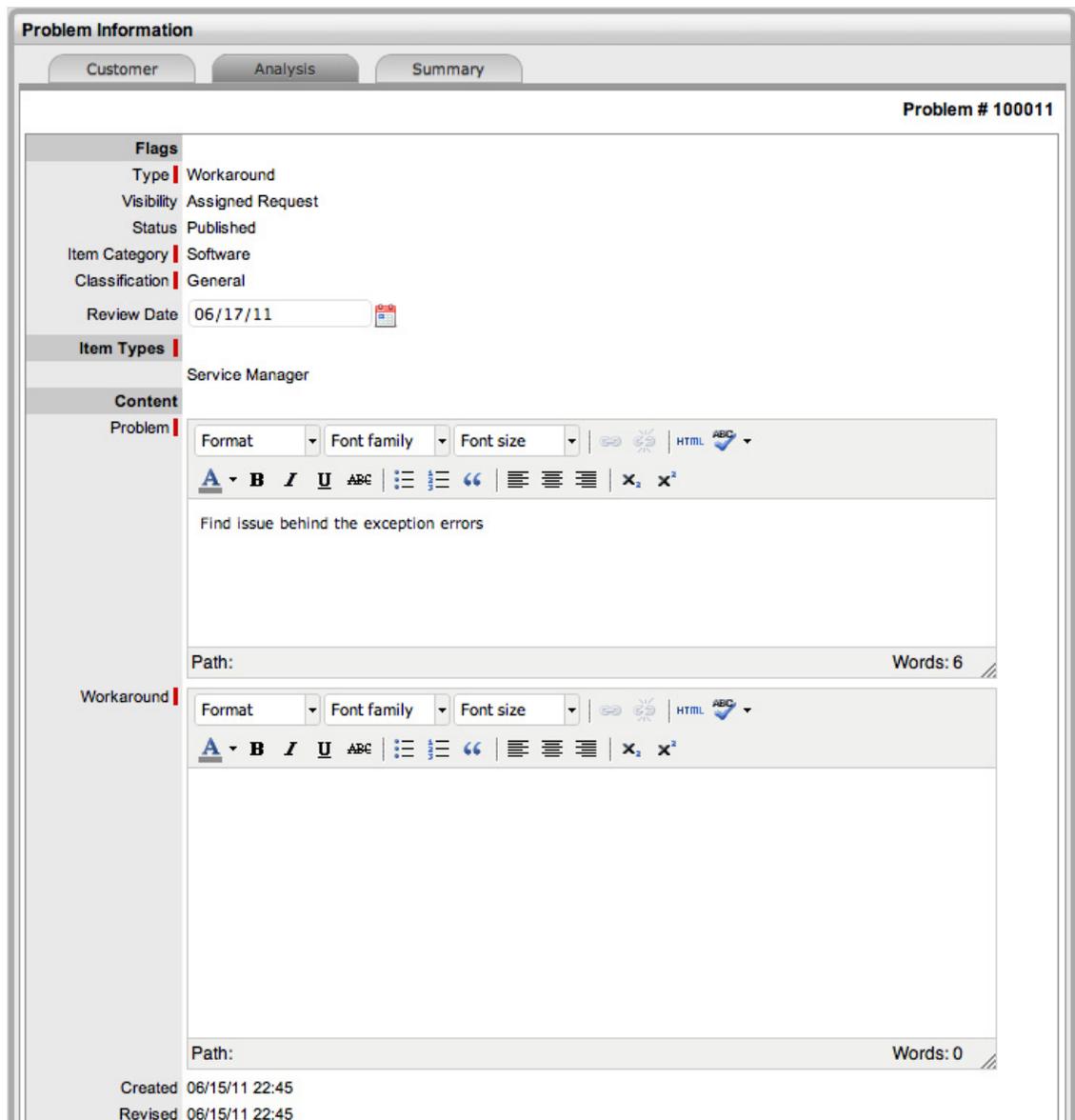


3. Select the New Workaround option within the drop-down list

The screen defaults to the expanded Solution Article editor with the Visibility and Status locked down.

Visibility Options	Description
Assigned Request	The default visibility. This means that the solution is only visible relative to the Problem through which it was created.
Users	Visible by internal Users only (i.e., not Customers).
Users & Customers	Visible to internal Users and Customers logged into the application.
Everyone	Available publicly, without logging into the system.

4. Enter a Review Date or leave blank for the field to be automatically populated when saved
The Item Category, Classification and Item Type are all drawn from the related request.
5. Edit the Problem content if required



6. Enter the Workaround content
7. Upload an relevant Attachments, within the Attachments tab
8. Click Save.

Requests Tab

Workaround Articles generated within requests, include a Requests tab. This tab enables the User to view details of the request related to the Article. For detailed information about Knowledge Base Articles.

Summary Tab

- ♦ [“Summary” on page 311](#)
- ♦ [“Changing an Incident’s Customer or Item” on page 314](#)
- ♦ [“Converting an Incident to a Service Request” on page 315](#)

- ◆ “Item Relationship Map and Assignment” on page 316
- ◆ “Updating the Item associated with the Request” on page 316

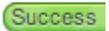
Summary

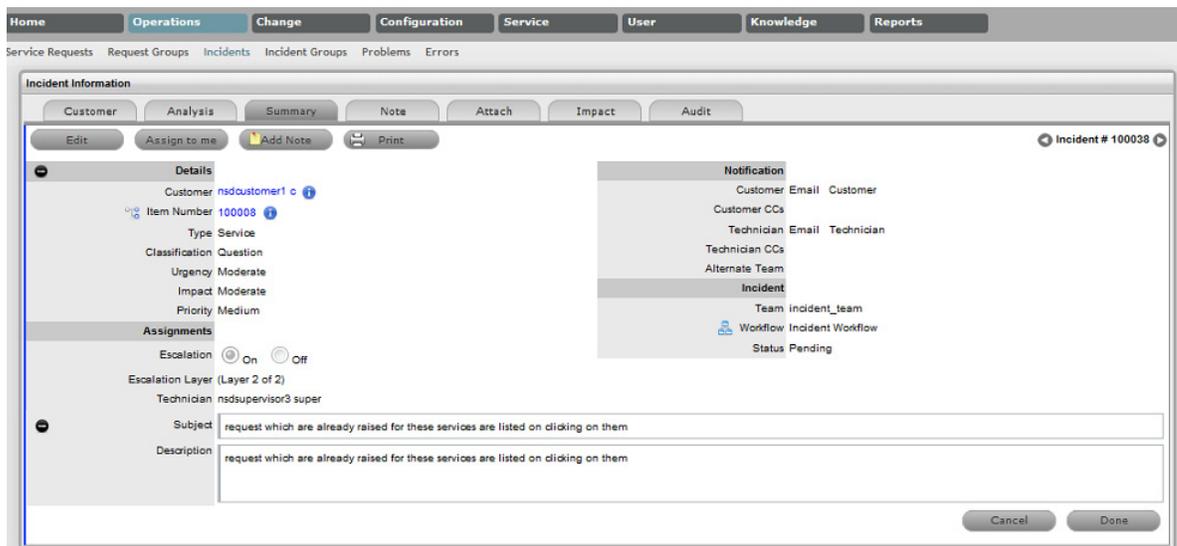
The Summary tab provides comprehensive details related to an Incident and gives access to the tabs required to work on the Incident. To view the details of a Customer, select the Customer name link within the Incident Information screen. The Customer and Item assigned to the Incident can be updated within the Customer tab by selecting , when in Edit mode.

The Incident Information Summary tab includes the following:

Summary Tab	Description
<i>Details</i>	<p>The following details are displayed:</p> <ul style="list-style-type: none"> ◆ Customer: The customer assigned to the Incident. Click on the customer name link to view customer information. Scroll over the information icon  next to the Customer for quick information such as Username, Org.Unit, Phone and Local Time. ◆ Item: An item assigned to the Incident. Select the Item Number link for more information about the Item. Scroll over the information icon  next to the Item Number to view Item information recorded on the Details tab. <p>Click  to view the Item Relationship map. Any Item displayed in the map can be set as the Item associated with the Incident, by making it the central node of the Relationship map and clicking on the centralized map icon to confirm the Item assignment change.</p> <p>To update the Item assigned to the Incident, click on the Customer tab and ensure that the Incident is in edit mode, or use the Update Item facility in the Relationships filter view of the impact tab.</p> <ul style="list-style-type: none"> ◆ Send Survey: This field is displayed when a Serviced Customer Survey is active in the system. The envelope icon allows the survey to be manually sent to the Customer. ◆ Type: Service request type such as Internet Explorer ◆ Classification: Displays the Incident Classification that was selected when the Incident was created. This can be updated, if required. ◆ Urgency: Indicates if the Incident is to be taken up on priority. ◆ Impact: Displays the progress of an Incident in relation to agreed Service Level targets and Workflow time estimates. Impact could be critical, high, moderate, low or very low. ◆ Priority: Shows the priority of the Incident, which determines the Service Level triggers applied to the Incident. <p>If the Derived option is enabled in the applications Setup, then the Urgency and Impact drop-down lists are displayed. The User is required to select the corresponding Urgency and Impact for the Incident to alter the Priority assigned.</p>

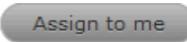
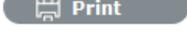
Summary Tab	Description
<i>Assignments</i>	<p>The following details are displayed:</p> <ul style="list-style-type: none"> ◆ Escalation: This is visible if the Escalation Control option is enabled in the application Setup. This is only available to the Supervisor and allows them to disable the escalation timers. ◆ Escalation Layer: Shows the number of levels of Escalation that exist in the Team assigned to the Incident, and at which level the Incident is currently assigned. ◆ Technician: The name of the Technician assigned to the Incident. When an Incident is assigned to the Queue, the name applied in the Technician field is System User. ◆ Subject: The details recorded in the Subject field are displayed in scroll-over summaries throughout the application. For example, when a new Incident is being entered for a Customer, a Recent Customer Requests list is displayed during the Incident creation process for all Items the Customer owns either directly or via shared ownership. The Requests list includes a scroll-over summary where Subject content is displayed, if the Subject is completed for an Incident. Subject information can also be included within a column in the Incidents List View, for a quick glance summary of an Incident. NOTE: The Administrator can set the Subject field to be required for Technicians and Customers within the Setup>Privileges>User and Setup>Privileges>Customer tabs, respectively. ◆ Description : The Incident report entered during Incident creation is recorded within the Description tab. Changes can be made to the Incident report within this tab if required, but it should be noted that an Audit Trail is not maintained for changes made within this screen. Therefore, it is recommended that any Incident Description changes be entered as a Note.
<i>Notification</i>	<p>The following details are displayed:</p> <ul style="list-style-type: none"> ◆ Customer: Shows how updates regarding the Incident are sent to the Customer who logged the Incident, or to all Owners of the Item associated with the Request. ◆ Customer CCs: <i>Customer CCs</i> is a free text field for any additional notification recipients, these can be divided into Customer and Technician CC lists. ◆ Technician: Allows the User to adjust the default Technician notification between None, Email or SMS for updating the assigned Technician, all Technicians in the Team or Layer of Escalation assigned to the Incident. ◆ Technician CCs: <i>Technician CCs</i> is a free text field for any additional notification recipients, these can be divided into Customer and Technician CC lists. ◆ Alternate Team: This is visible if the Notify Alternate Team option is enabled in the Admin>Email>Setup tab and another Team within the same Process is included in the system. This allows the User to define another Team to be notified about updates regarding the Incident

Summary Tab	Description
Incident	<p>The following details are displayed:</p> <ul style="list-style-type: none"> ◆ Team: Displays the default support Team assigned to the Incident. This can be changed by selecting another option within the drop-down list. The Team list is derived from the Workflow and Workflow State. ◆ Workflow: Displays the default Workflow assigned to the Incident. This can be changed by selecting another option within the drop-down list. The Workflow list is derived from the SLA assigned to the Incident. <p>Select  to view the Workflow in its entirety.</p> <ul style="list-style-type: none"> ◆ Status: Shows the current Workflow State of the Incident. ◆ Next Action: Lists all the States available after the current Incident State. This is based on the Workflow assigned to the Incident. To move the Incident through the Workflow, select a Status included in the list displayed. ◆ Status Due: Details the expiry time for the current Workflow State if the State has an OLA assigned.
Service Terms	<p>The following details are displayed:</p> <ul style="list-style-type: none"> ◆ Agreement : Displays the Service Level Agreement assigned to the Incident. The SLA is derived from either the Item, Customer or Organizational Unit. ◆ Service Manager: Displays the name of the Service Level Manager responsible for overseeing Incidents related to the assigned service agreement. ◆ Progress: Visually displays how the Request is tracking against the assigned SLA and displays the percentage of SLA used when greater than 10%. The grey progress bar is gradually filled in based on the status: <ul style="list-style-type: none"> ◆  - Workflow is in an SLA paused state. Triggers will not fire. ◆  - Workflow is in an SLA timers on state. Triggers will fire. ◆  - Workflow is in an Exit state and the SLA has been successfully maintained. ◆  - Assigned SLA has been breached and Workflow is in an Exit state. ◆ Dates: Summarizes the important date details for the Incident. The due date is automatically calculated based on the Service Level assigned to the Incident. ◆ Time Recorded: Displays the amount of time the Incident has been open and worked on. ◆ Affects: Displays the number of Users assigned to the Item.



NOTE: Only Technicians assigned to the Team can edit the Incident.

Summary Tab Buttons

	<p>Edit opens the Incident in edit mode. This allows the Incident details to be amended, Notes to be added and time is automatically recorded against the Incident whilst in edit mode.</p>
	<p>Changes the default assignee of an incident to a different technician. This right is available only for technicians belonging to the same layer or team.</p>
	<p>Opens the Incident in edit mode and moves directly to the New Note editor.</p>
	<p>Duplicate creates a copy of the Incident and links the copy to the original Incident. The User can then amend the Customer or Item details, if required.</p>
	<p>Print opens a summary of the Incident in a Print View window. This includes a Description and all Notes added to the Incident. It is a good alternative for viewing Incident information within one window when adding a new Note.</p> <p>NOTE: To remove Private Notes from the output, remove the tick in the 'Show Private Notes' box.</p>
	<p>Allows the User to create or view reminders related to the Incident. When published it will be displayed like the normal alert icon.</p>
	<p>The escalation buttons allow the User to escalate the Incident to next layer within the Team, or de-escalate the Incident to the lower level, if required.</p>

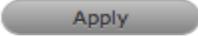
Changing an Incident's Customer or Item

After an Incident has been created, it may be necessary to change the assigned Customer or Item. This may be the case when the Unknown Item is associated with a request, or a Service Item has been assigned to the Incident and the relevant hardware, software or network Item needs to be associated with the Incident. When the "Allow Unknown" option is disabled in the Setup>Privileges>Requests tab and a Incident that is assigned to the Unknown Item is opened in Edit mode, the User will be prompted to update the Item assigned to the Incident before the Save button action can successfully record changes to the Incident.

NOTE: This option is required when an Incident is created through Email, as the Item assigned may be the system's default Unknown Item or the Org Unit's default Item.

To change the Item:

1. Click the Incident's Edit button
2. Select the Incident's Customer tab
3. Click the Item Number 
The Find Item option appears.
4. Search and select a new Item
5. Click

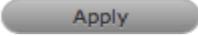


6. Select the Summary tab to continue working on the Incident, or click Cancel and Done to close the Incident with the newly assigned Item.

NOTE: Technicians do not have the ability to delete Incidents or Customers.

To change the Customer:

1. Click the Incident's Edit button
2. Select the Incident's Customer tab
3. Click  next to the Customer Name
4. Search and select a Customer
5. Click



If the Incident's Item needs to be altered as a result of the Customer change the Find Item field appears. Search and select the appropriate Item using the Find Item search.

6. Select the Summary tab, to continue working on the request
7. Click Save.

Converting an Incident to a Service Request

An Incident that has been logged against a Service Item, can be converted to a Service Request within the Analysis tab. This action results in the Service Request maintaining the same request identification number and audit trail, which records the conversion.

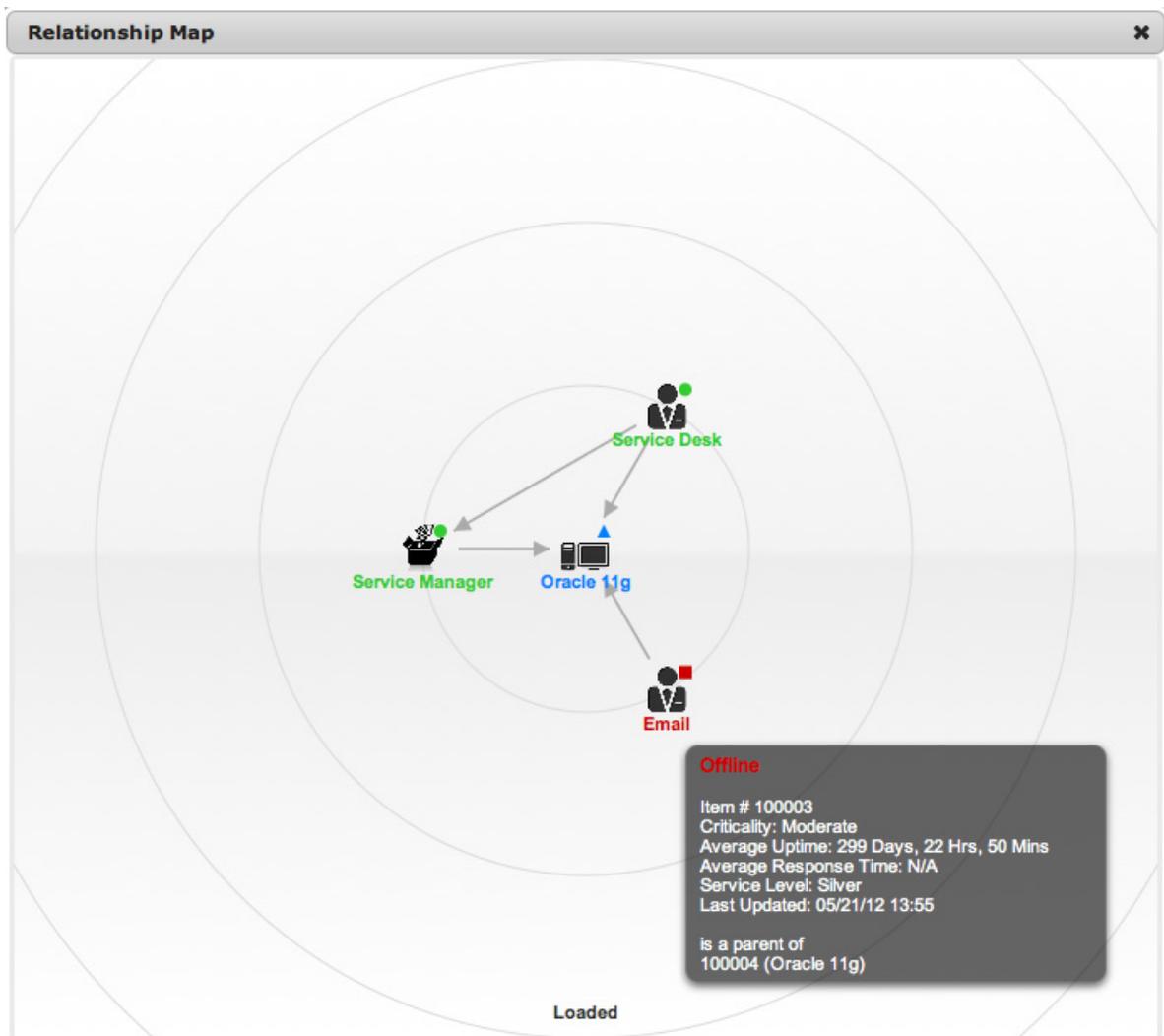
To convert an Incident logged against a Service Item to a Service Request:

1. Select Edit within the Analysis tab
2. Select the Convert to Service Request option.

The Incident ID # is associated with a new Service Request and the Request is assigned the Entry State of a relevant Service Request Workflow. The audit trail of the Service Request records the conversion time and date. The customer is not notified about the Process amendment.

Item Relationship Map and Assignment

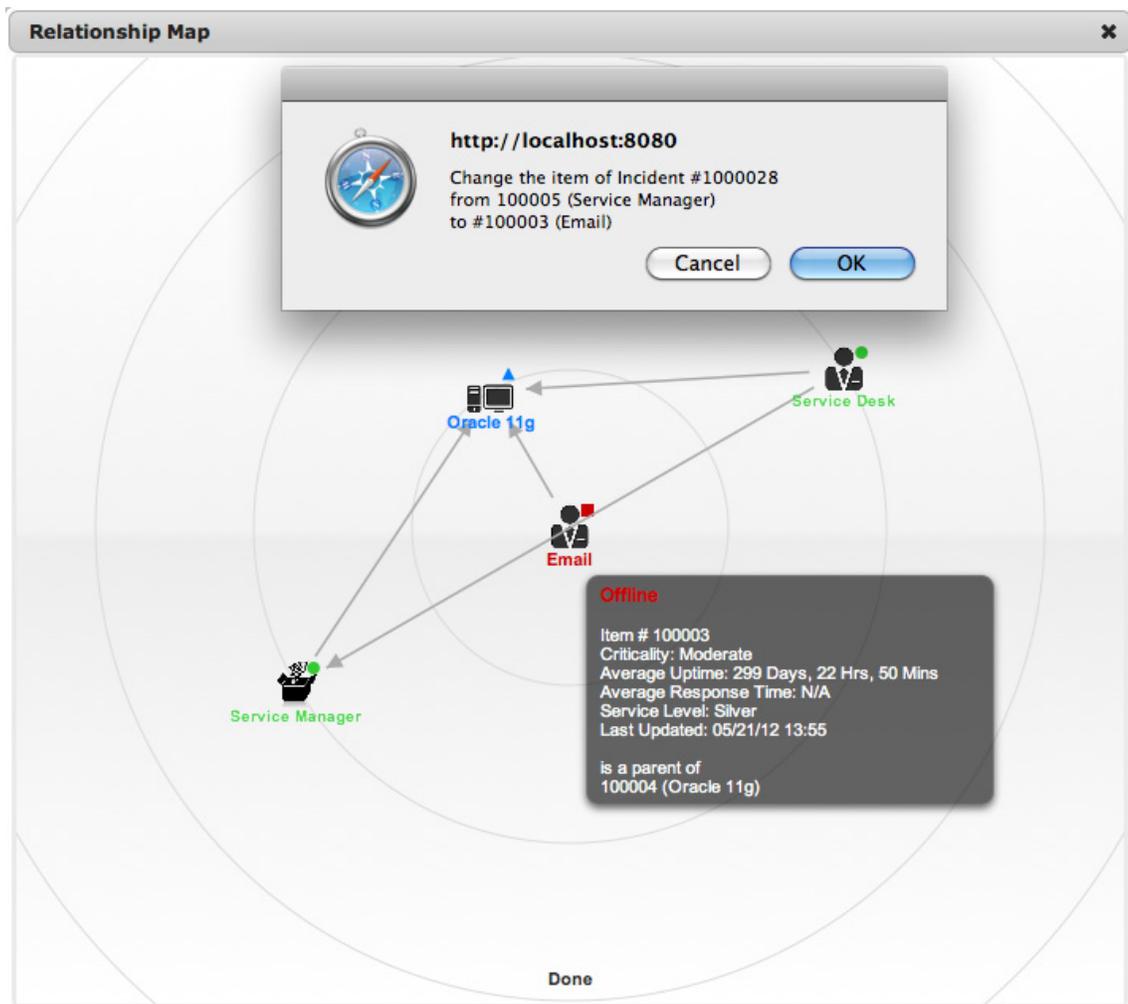
Selecting  opens a pop-up window that displays a map of Items that are related to the Request Item that can be navigated by clicking on the icons within the map. To view related Item information, scroll over the relevant Item icon.



Updating the Item associated with the Request

The Item associated with the request can be updated when in the request is in Edit mode:

1. Select 
2. Navigate the map to move the relevant Item icon to the central point of the map
Select the Item icon label in the Map to move it to the central node.
3. Click the icon label when it is in the middle of the map
A warning message is displayed, prompting the confirmation of the Item change.



4. Select OK and the Item association will be updated
(If the Enable Item Shadow option is enabled by the Administrator in the Setup>Privileges>Customer tab, the change of Item information will not be visible on the Customer Portal.)
5. Select  to close the window.
The Item assignment change is recorded in the Audit tab.

See: [Item Relationships](#)

Notes Tab

- ◆ “Notes” on page 318
- ◆ “Add Note” on page 318
- ◆ “Viewing All Notes” on page 318
- ◆ “Adding a Note” on page 318
- ◆ “Create Knowledge” on page 319
- ◆ “Solution” on page 320
- ◆ “Propose Handshake” on page 320

- ◆ “Draft Note” on page 320
- ◆ “Changing the Status of an Incident Note” on page 321
- ◆ “Viewing a Note” on page 321
- ◆ “Replying to a Note” on page 321
- ◆ “Emailing Saved Incident Notes” on page 322
- ◆ “Adding Notes to Groups” on page 322

Notes

The Incident Notes tab displays entries made by a User or Customer regarding an Incident. New Notes are date-stamped automatically and associated with the User logging the Note.

The number of Notes recorded against an Incident is displayed in brackets on the Notes tab, and if a Note has been added by a Customer or a Technician other than the Technician assigned to the Incident, an asterisk will also be visible on the Notes tab until the assigned Technician opens the Note.

Add Note



The Add Note button can be used to open the Incident in Edit mode and automatically access a new Note window, as shown in Step 4 below.

Viewing All Notes



Use an Incident's Print button to access a list of all Incident Notes in one screen. To hide Private Notes in the Print output, remove the tick from the Show Private Notes box.

Adding a Note

When the first Note is created for an Incident, the Incident Description automatically populates the New Note editor allowing the Technician to enter their response.

To add a Note:

1. Click the Incident ID Number
The Incident Information> Summary tab appears.
2. Click Edit
3. In the Notes tab, click New
4. Enter the Note details

Or, select a Template if a relevant pre-configured response has been set for the Item Type or Category for the Item assigned to the Incident.

5. Enter Note Time

The time entered represents the amount of time accumulated to formulate the Note's content or time spent working on a request away from the system. If no additional time has been spent on the Incident away from the application this field will be automatically populated with the Logged Time when the Incident is in Edit mode, if the Manual Request Time option is disabled in the

Setup> Privileges> User tab. When this option is disabled,  is visible next to the Incident number in the top right corner of the Summary Tab screen when the Incident is in Edit mode. (See: [Contracts Logged Time.](#))

6. Adjust the time and date work was completed, if relevant

7. Add attachments to be sent with the Note, if required

A maximum of two attachments can be added per Note.

8. Adjust the Note visibility, if relevant

The default Private or Public visibility for Email Notes is set within Admin> Setup > Privileges > Requests, and can be adjusted on a per Note basis.

9. Refine the Email Recipient options as required

The default Request Notifications for Notes is set within the Team assigned to the Request, and can be adjusted on a per Note basis.

Vendors, as Email Recipients, is displayed as an option if the Incident is in a State associated with an Underpinning Contract.

10. Click .

The Note editor screen will close and the Note will be emailed to recipients, if defined.

Create Knowledge

NOTE: This option is only visible for Public Notes.

When a new Note is created for an Incident it can be added to the Knowledge Base by selecting the Create Knowledge option. By selecting this option and then clicking the Propose or Solution button, the system automatically moves the Incident to the default Closed State for the Workflow and creates

a Solution Knowledge Base Article with a visibility of Assigned Request. This visibility allows Customers of a shared Incident to view the Solution. For the Solution to be available to other Customers of the same Item Type, the visibility must be adjusted to Technicians and Customers within the Analysis tab of the Incident or the Knowledge Tab.

Solution

Solution

If an Incident Note resolves the issue, the Note can be saved as the Solution. This will convert the Note into a Solution Article (found under Incidents > Analysis tab), by enabling the Create Knowledge option before selecting the Solution button. Clicking the Solution button will automatically move the Incident to the default Closed State. If a Solution is applied to an Incident containing attachments, the attachments are included in the Solution email.

To save a Note as the Solution:

1. Enter the Note details
2. Select Create Knowledge, if the Note content is to be available in the Knowledge Base
3. Click Solution.

For Create Knowledge enabled Notes the content will be recorded as the solution under the Analysis tab. The Status of the Incident will change to the default Exit State of the assigned Workflow.

NOTE: This option is not available if the Handshaking facility is enabled in Admin> Setup> Privileges> Requests.

Propose Handshake

Propose

If a Note is a possible solution to an Incident, it can be sent to the Customer with a notice stating the Incident will be closed in a set number of days if no correspondence is received from the Customer. (The time span, in days, is specified by the Administrator in Setup>Privileges>Requests or within the Organizational Unit information screen).

To send a Public Note with a Handshake Notification:

1. Within the Notes Editor, enter the possible solution
2. At the bottom of the Notes field, click the Propose button.

The proposed solution and handshake notification will be sent to the Customer. The Incident will automatically change status to On Hold - Pending Approval.

NOTE: For a Customer to re-open an Incident using the link in the handshake email, the web server must be using Port 80.

Draft Note

Draft

Use the Draft button to save an incomplete Note entry, which will be displayed in the Notes list. When a Note is saved as a draft, the Status will be displayed as . If the Add Note button is selected when a draft Note has been recorded against a request, a warning will be displayed. To continue working on a draft Note, open the request in Edit mode and select the Note No. hyperlink.

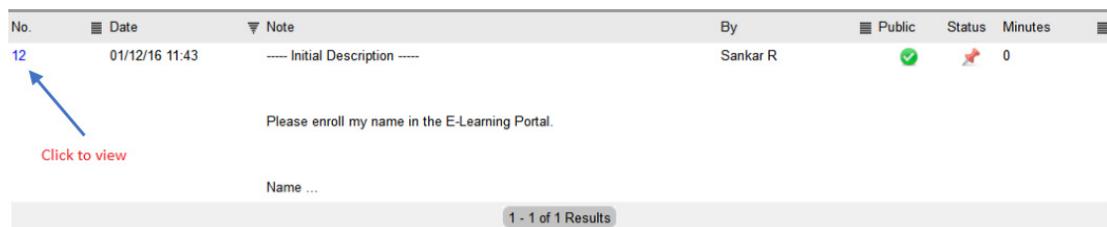
Changing the Status of an Incident Note

- When the Incident Note is created, it can be either public or private. After the Note is saved, it is possible to switch visibility
- If a Note is marked Private, a padlock graphic is visible. To change the status to Public, click  to display 
- To change the Public Incident Note to Private, click  to display .

Viewing a Note

To view a Note:

1. Select an Incident ID Number
2. Select the Notes tab
3. Click on the Incident Note Number hyperlink.



No.	Date	Note	By	Public	Status	Minutes
12	01/12/16 11:43	Initial Description ---- Please enroll my name in the E-Learning Portal.	Sankar R			0

Click to view

Name ...

1 - 1 of 1 Results

When Notes are viewed without opening the Request in Edit mode by clicking the Note No. link, the User can scroll through the Notes list by selecting   inside the top right corner of the Notes window.

Replying to a Note



To reply via email to a Customer Note:

1. Click the required Incident ID number.
The Incident Information screen appears.
2. Select Edit
3. Select Notes tab
4. Click on the Note number
The Note appears.
5. Click Reply
The new Notes editor is opened and includes the Customer Note.
6. Enter the Note content

7. Adjust the Visibility and Recipients settings, accordingly
8. Select Add Note to send the Note, or click Draft to finish the Note later.

Emailing Saved Incident Notes



To email a Customer after a Note has been saved:

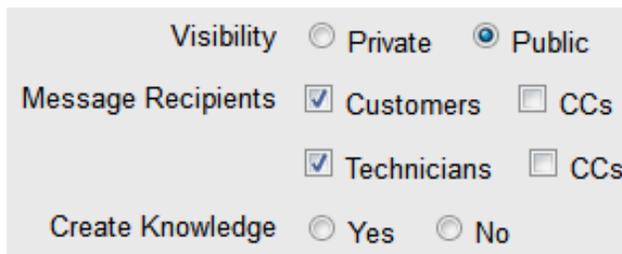
1. Click the required Incident ID number
The Incident Information screen appears.
2. Select Edit
3. Select Notes tab
4. Click on the Note number
The Note is displayed.
5. Click Email to send the Note to the Customer and any other Users added to the notification list.

Adding Notes to Groups

When a Note is created for an Incident that belongs to a Group, the Apply to Group option is visible within the Notes tab. If the new Note is to be assigned to all requests within the Group, select the Apply to Group option.

NOTE: Any new requests added to the Group at a later date will also have all pre-existing Notes, with this option selected, applied to the newly grouped request.

When the Apply to Group option is selected, the Add Note Time to Group option is displayed. Select this checkbox to also apply the Note Time to each of the requests.



Selecting the Apply to Group option and then clicking the Solution button, closes all Incidents within the Group.

Attachments Tab

- ◆ [“Attachments” on page 322](#)
- ◆ [“Adding an Attachment” on page 323](#)
- ◆ [“Deleting an Attachment” on page 323](#)

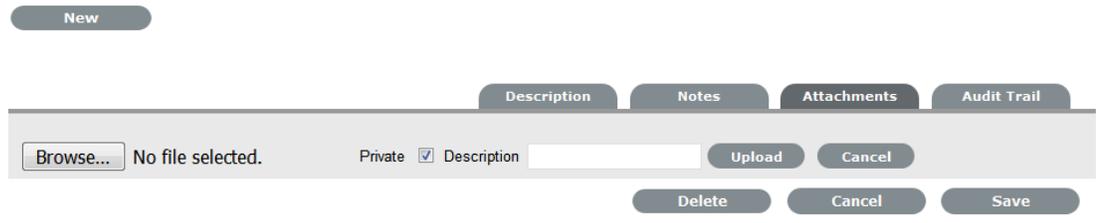
Attachments

All Users can attach files to an Incident. Any type of file can be attached either by a User, Customer or via email.

Adding an Attachment

To add an Attachment:

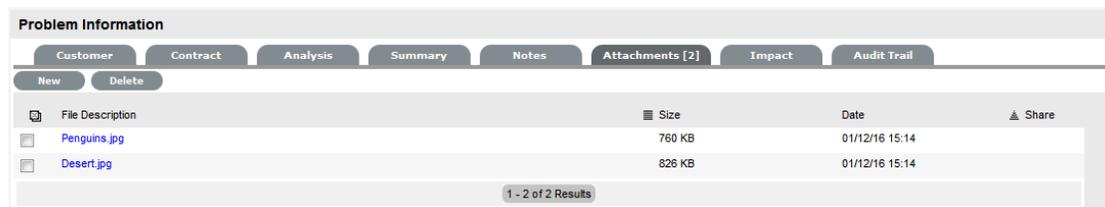
1. Select an Incident number ID
2. Click Edit
3. Select the Attachment tab
4. Click



5. Click Choose File to browse and select a file
6. Mark Private, if the attachment is not to be available on the Customer Portal
7. Enter a file Description, if necessary
8. Select to upload the file or to cancel the process.

The uploaded Attachment is automatically date stamped and shown as a file name link along with its file size.

To open an Attachment, select the file name hyperlink.



File Description	Size	Date	Share
<input type="checkbox"/> Penguins.jpg	760 KB	01/12/16 15:14	
<input type="checkbox"/> Desert.jpg	826 KB	01/12/16 15:14	

NOTE: Incidents that are part of a Group and have attachments uploaded within the Group Details Screen, display  within the Share Column.

Deleting an Attachment

To delete an Attachment, select the checkbox beside the File Description then click Delete. The addition or removal of Attachments is recorded within the Audit Trail of the Incident.

Impact Tab

- ◆ [“Impact” on page 324](#)
- ◆ [“Service Targets” on page 324](#)
- ◆ [“Service Level Breaches” on page 324](#)
- ◆ [“Services Affected” on page 325](#)
- ◆ [“Estimates” on page 326](#)
- ◆ [“Contract Monitor” on page 326](#)

Impact

The Impact tab provides the capability to measure the progress of an Incident relative to agreed Service Level targets and Workflow time estimates. It also includes a quick reference for identifying other Services or Items affected by the Incident. This tab displays a summary of the following:

- ◆ Service targets
- ◆ Workflow estimates
- ◆ The impact of the current Incident on related infrastructure.

The drop-down filter options within the Impact tab include:

Options	Description
Service Targets	Displays the target response, restoration and resolution times based on the Service Level Agreement/OLA assigned to the Incident.
Service Level Breaches	Displays service level breaches that have occurred and allows Users to assign a breach code and explanation for the breach.
Services Affected	Displays the Service Item Number, the Service SLA and number of Affected Users for any Services related to the Item associated with the Request.
Estimates	Provides a summary of the time estimated for each state of the Workflow based on the OLA assigned to the Incident.
Contract Monitor	If the current Incident Workflow State is assigned an Underpinning Contract or OLA, a table is displayed outlining the response, restoration and resolution milestones. When a milestone is met, the User is required to check the relevant checkbox. The application will automatically calculate the actual time accrued to achieve the milestone. The value displayed here is used for the Contract reports.
Purchases	When Purchase Orders are enabled in the system, any Purchase Orders associated with Items assigned to the Incident are accessible through this option.

Service Targets

The details displayed here are drawn from the Service Level assigned to the Incident. These include the target Response, Restoration and Resolution times for an Incident, based on the Priority assigned. If an Underpinning contract or OLA has been assigned to the Incident's current State then the targets for that contract will also be listed.



The screenshot shows a web interface with several tabs: Customer, Contract, Analysis, Summary, Notes, Attachments, Impact, and Audit Trail. The 'Impact' tab is selected. Below the tabs is a 'Display:' dropdown menu set to 'Service Targets'. Below the dropdown is a table with the following data:

Name	Priority	Response Time	Restoration Time	Resolution Time	24 x 7 support
SLA Warranty	Medium	18 Hours	36 Hours	72 Hours	Yes

For more information on Service Targets, see: [Service Level Agreements](#).

Service Level Breaches

When an Incident Service Level Agreement is violated, a service level breach is recorded against the Incident. The User assigned to the Incident will be notified and asked to provide a reason for the breach and assign a breach code.

Description	Notes	Attachments	Impact	Audit Trail
Display: Service Level Breaches				
Edit				
SLA breached	Warranty			
SLA priority	Warranty - Low			
Phase breached	Response			
Event date	05/09/11 23:25			
Technician responsible	Simone Supervisor			
Breach code				
Additional Info	SLA Breached - Response Time Exceeded (24 hrs)			

To assign a Breach Code:

1. Click the Incident number
2. Click Edit
3. Select Impact > Service Level Breaches
4. Click Edit
5. Assign a Breach Code
(The available codes are created by the Supervisor within the Service tab.)
6. Add any additional information, if required

Breach code: Technical Problem

Additional Info

Format | Font Family | Font Size | HTML

| | |

No notification was received

Path: Words:4

7. Click Save.

All breach information is used for reporting on Service Level Agreements.

Services Affected

When the request is logged against an Item that is associated with Services within the Item Relationships tab, the Services Affected option displays the Service Item Number, the Service SLA and number of Affected Users.

Estimates

The Estimates option allows Users to view an indication of the approximate amount of time that an Incident should remain in each State of the assigned Workflow, the amount of time logged in each State and the length of time the Incident resided in each State.

Options	Description
Estimate	Indicates the approximate length of time the Incident will spend in the Workflow State. This field is automatically completed if an OLA or UC is assigned to the Workflow State.
Logged	Is a combination of time accrued against the Incident when in edit mode with the automatic timers enabled, and the sum total of Note Times manually entered by Users.
Total	The total time an Incident has resided in the Workflow State.
% Active	The percentage of the Total Time that the Incident was actively worked on when in the State. The calculation is, (Logged time divided by Total time) x 100.

To manually add an estimated time frame for a Workflow State:

1. Select an Incident number ID
2. Click Edit
3. Move to the Impact tab
4. Select Estimates from the drop-down list
5. Select the State hyperlink within the Status column of the Estimate Time to be adjusted
An editor box is displayed.
6. Enter the Estimated time in the available field
7. Click Save within the editor box
8. Make any other time adjustments, if required
9. Select Save to record all manually entered time adjustments against the Incident.

Status	Workflow	Estimate (mins)	Logged	Duration	% Active
Open	Incident Workflow	0	0	0	0%
Open - Restored	Incident Workflow	0	0	0	0%
Pending	Incident Workflow	0	0	4 Mins	0%
On Hold	Incident Workflow	0	0	0	0%
On Hold - Client Action	Incident Workflow	0	0	0	0%

Contract Monitor

When a Workflow State with an OLA or Underpinning Contract is assigned to the Incident, the Contract Monitor displays the details of the Contract.

Details	
Underpinning Contract	Canton Services
Start Time	05/11/11 21:21
Milestones	
Expected Response Time	05/12/11 21:21
Responded	<input type="checkbox"/>
Expected Restoration Time	05/13/11 21:21
Restored	<input type="checkbox"/>
Expected Resolution Time	05/15/11 21:21
Resolved	<input type="checkbox"/>
Comments	<div style="border: 1px solid blue; height: 100px;"></div>

Breached Response Time

Check when the Service Provider meets the Restoration or ResolutionTime

The information is used for reporting purposes and includes:

Details	Description
Contract Type	Specifies if the Contract Type is an OLA or Underpinning Contract.
Start Time	Auto-generated time the Incident moved to the current Workflow State.
Milestones	
Expected Response Time	Response Time calculated using the Contract target parameters.
Responded	Actual Response Time auto-calculated when the User checks the box.
Expected Restoration Time	Restoration Time calculated using the Contract target parameters.
Restored	Actual Restoration Time auto-calculated when the User checks the box.
Expected Resolution Time	Resolution Time calculated using the Contract target parameters.
Resolved	Actual Resolution Time auto-calculated when the User checks the box.
Comments	Allows for additional comments, if required.

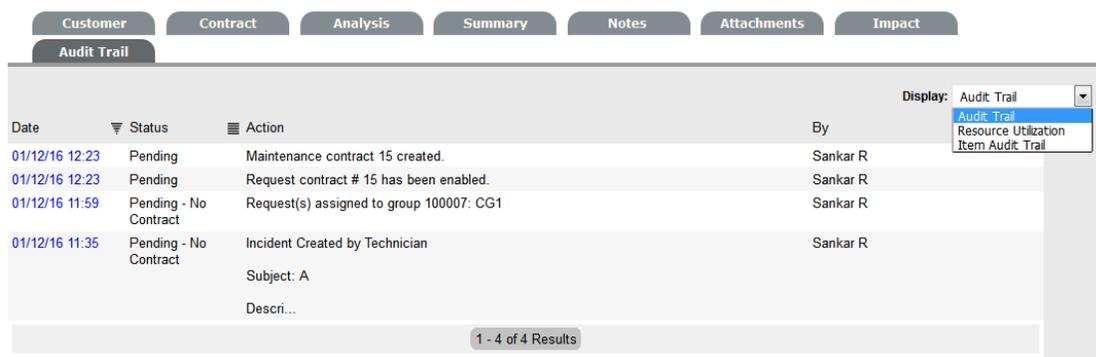
NOTE: If Milestones are breached the Response, Restoration and Resolution times are assigned a red marking.

Audit Tab

- ◆ [“Audit” on page 328](#)
- ◆ [“Audit Trail” on page 328](#)
- ◆ [“Resource Utilization” on page 328](#)
- ◆ [“Item Audit Trail” on page 328](#)
- ◆ [“Service Terms” on page 328](#)
- ◆ [“Time Recorded” on page 330](#)

Audit

The Audit tab lists all activities that occur within the lifecycle of an Incident, the resources used and the history of the Incident's Item.



The screenshot shows a web interface with several tabs: Customer, Contract, Analysis, Summary, Notes, Attachments, and Impact. The 'Audit Trail' tab is selected. Below the tabs is a table with columns for Date, Status, Action, and By. A 'Display:' dropdown menu is open, showing options: Audit Trail (selected), Resource Utilization, and Item Audit Trail. The table contains four rows of data. At the bottom of the table, it says '1 - 4 of 4 Results'.

Date	Status	Action	By
01/12/16 12:23	Pending	Maintenance contract 15 created.	Sankar R
01/12/16 12:23	Pending	Request contract # 15 has been enabled.	Sankar R
01/12/16 11:59	Pending - No Contract	Request(s) assigned to group 100007: CG1	Sankar R
01/12/16 11:35	Pending - No Contract	Incident Created by Technician Subject: A Descri...	Sankar R

Audit Trail

The Audit Trail option records all changes made to an Incident. The logged changes, which can be exported via PDF include:

- ◆ Date and time the Incident was assigned and/or reassigned to Technicians
- ◆ When the Incident was escalated to a new layer of support, or had its priority or due date changed
- ◆ Details of Notes added
- ◆ Attachments activity
- ◆ Status change
- ◆ Classification change
- ◆ Logged time.

Resource Utilization

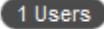
The Resource Utilization option displays a breakdown of the time an Incident was worked on at each level of support. It details the User's name, the escalation layer they belong to and the amount of time they have spent on the Incident.

Item Audit Trail

The history of the Item associated with the Incident is detailed within Item Audit Trail. To access more information regarding an Item Audit Trail entry, select the ID number hyperlink.

Service Terms

The Service Terms sidebar displays the Service Level Agreement (SLA) assigned to the Incident and provides details of key dates.

Service Terms	
Service	
Agreement	Warranty
Progress	
Open Date	
Due Date	01/11/16 14:59
FSC Date	
Last Action	01/08/16 14:59
Time Recorded	
Affects	

By default the application calculates the Due Date based on the Priority of the SLA assigned to the Customer, Organizational Unit or Item. The email reminders and escalations are then managed accordingly. If an SLA is not associated with the Incident via the Customer, Org Unit or Item, the system default SLA will be automatically assigned to the Incident but can be manually adjusted by the Technician. Once the Workflow is moved from the default Open State, the SLA can no longer be edited.

Service Terms

Agreement	<p>Displays the Service Level Agreement assigned to the Incident. The service level is derived from either the Customer, Organizational Unit or Item.</p> <p>When Contracts are not enabled, the Agreement field can be edited, when the Incident is in edit mode.</p>
Service Manager	Displays the User assigned as the Service Manager for the assigned SLA.
Progress	<p>Visually displays how the Incident is tracking against the assigned SLA. The grey progress bar is gradually filled in based on the status of the SLA:</p> <p> - Workflow is in an SLA paused State. Triggers will not fire.</p> <p> - Workflow is in an SLA timers on State. Triggers will fire.</p> <p> - Workflow is in an Exit State and the SLA has been successfully maintained.</p> <p> - Assigned SLA has been breached and Workflow is in an Exit State.</p>
Open Date	The open date field is automatically populated when the Incident is created.
Due Date	By default the application calculates the Due Date based on the SLA Target for the Priority assigned to the Incident, and email reminders are sent accordingly.
Fix Date	Auto-filled when the Incident moves into a Workflow State that is defined as meeting the SLA Resolution Time.
Remaining	Auto-filled and visible when there is SLA time remaining.
Time Overdue	Auto-filled and visible when the SLA is overdue.
Close Date	Auto-filled when the Status of an Incident is set to Closed. This date is fixed.

Service Terms

Resolution Time	Auto-filled with the number of minutes it took for the Incident to move from the first SLA active State to a Workflow State that is defined as meeting the SLA Resolution Time.
Last Action Date	Auto-filled when Done or Save is selected after the Incident has been modified or opened in edit mode. As changes may be made to an Incident after it has been Closed, this date may fall after the Close Date.
Time Recorded	Displays the sum total of automatically logged time, when the Incident is in edit mode plus any manually entered Note Times.
Affects	Number of Customers assigned to the Item associated with the Incident.

NOTE: Each User can customize the date format within the My Account sub-menu option. To change the date format go to Home>My Account, click Edit and select the preferred format.

Time Recorded

Time Recorded uses a combination of auto-timing and manual Note Time entries to measure and monitor the time spent working on an Incident.

The Auto-timer is activated when an Incident is opened in Edit mode, if enabled by the Administrator in the Admin>Setup>Privileges>User>Manual Incident Time. When the Incident is saved after any amendments have been made, the timer stops and records the length of time the Incident has been worked on. This total is added to the sum total of any manual Note Time entries made by Technicians when they are adding Notes.

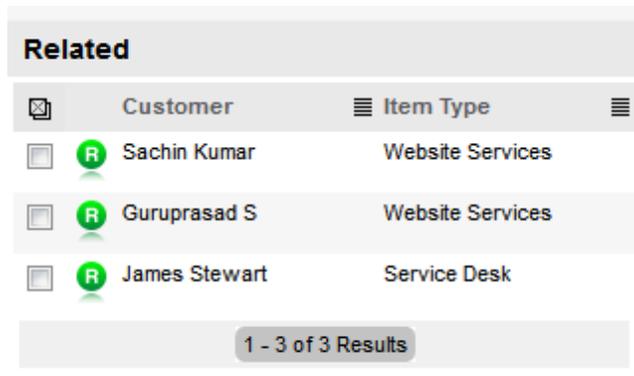
The Time Recorded is used by the system when the Contracts functionality is in use.

Related Requests

The Related Requests sidebar is automatically displayed when an Incident is linked to other requests.

Incidents can be linked in the following ways:

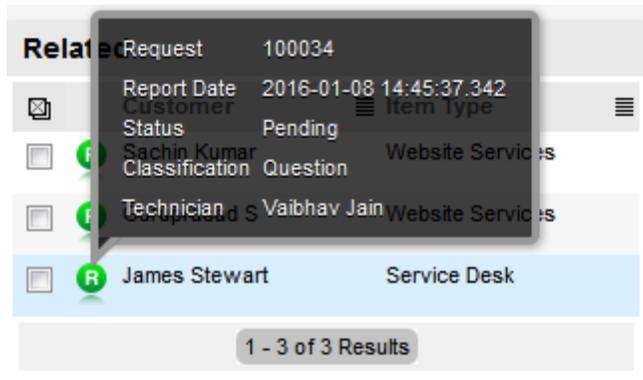
- ◆ Using the Group button within the Incident list
- ◆ Within the Incident Groups option under the Incident tab
- ◆ Linking requests within the Analysis tab of an Incident
- ◆ A result of multi-Item request creation.



Any Incidents that belong to a Group can be viewed within the Related Requests sidebar window, inside the Incident Information screen. Within this window, all related requests are listed and can be controlled as one. For example, Notes can be applied to all related Incidents, or the entire Group can be closed.

Managing Related Requests

The details of a related request can be viewed by hovering the mouse over the colored icon. Click on the same icon, and the system moves to the Incident Information screen of that related request.



Bulk Updates

The Bulk option allows one or more related requests to have the following information updated simultaneously:

- ◆ Priority, Workflow, Status, Team, Escalation Layer & Technician
- ◆ Notification method and recipients
- ◆ Request Classification
- ◆ Items
- ◆ Description, Attachments and Notes.

To bulk update for any of the above elements:

1. Select Operations>Incidents

Or, within Operations>Incident Groups select the Group Number and move to the Related sidebar.

2. Click on the Request # hyperlink of the relevant grouped request
3. Tick the checkboxes of the appropriate requests in the Related sidebar that are to be updated
4. Select

Bulk

The system displays the Bulk Editor screen.

NOTE: The system does not allow requests with a Status of Pending-No Contract to be updated. If the bulk update is only associated with Requests of this Status, an error message is displayed.

5. Amend the appropriate element as per the above list
6. Click Save.

Remove Related Requests

To remove a request from a Group:

1. Go to Operations>Incidents
Or, within Incident>Incident Groups select the Group # link and move to the Elements tab
2. Click on the Request # hyperlink of a Grouped Request
3. Click

Edit

The Incident opens in Edit mode and checkboxes become available next to the Incidents in the Related sidebar.

4. Tick the checkboxes of the requests to be removed
5. Select **Unlink**.

The marked requests are removed from the Group.

Closing Incidents within Groups

Requests within the Related sidebar can be closed individually by moving the Workflow State to a Exit/Closed State within the Incident Information Screen. Grouped requests can also be closed as a group, by changing the request Status to a Exit/Closed State as part of a Bulk update. (See Bulk Updates above.)

Editing Multiple Requests

Customer Contract Analysis Summary

Details

Priority Medium

Impact Moderate

Urgency Moderate

Workflow Incident Workflow

Status

Team

- Cancelled
- Cancelled - Unpaid

Notification

- Closed - Resolved
- Closed - Restored
- On Hold
- On Hold - Client Action
- On Hold - Pending Approval
- On Hold - Process Escalated
- Open
- Open - Restored
- Pending
- Pending - No Contract

Classifications

Iphone 6 Account Details

Item

- Vamsi Krishna (100026)
- Electrical Engg

Alternatively, all Incidents can be closed by using the Solution button within the Notes tab of an Incident. This option is available if the Handshaking facility has not been enabled for the system, within the Administrator>Setup>Privileges>Requests tab.

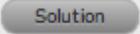
To close related Incidents using this method:

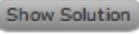
1. Go to Operations>Incidents
Or, within Operations>Incident Groups select the Group Number and move to the Elements tab.
2. Select the Incident # hyperlink of a request in the relevant Group
3. Click

Add Note

4. Enter the Note details of the Solution
The Visibility option must be set to Public to access the Solution or Propose button.
5. Check the Apply to Group option
If relevant, add Note Time across the Group.

Group Options Apply to Group
 Add Note Time to Group
 Create Knowledge Yes No

6. If relevant, enable Create Knowledge
This will move the content of the Note field to a Solution Knowledge Base Article with the Visibility of Assigned Request.
7. Click .
The related requests are automatically closed and the Note content is also made available in the Knowledge Base if the Create Knowledge option was enabled.

NOTE: When an Incident has a Solution applied to it, the  icon is visible next to the exit Status, within the Incident Summary Tab. To view the Solution, click the icon.

Status

Incident Workflows are a combination of any number of stages or States that cover the lifecycle of an Incident. A Supervisor creates new Incident States for the default Incident Workflow or builds new Workflows in the Service >Workflows tab. For more information about configuring Workflows. See: [Workflows](#).

Within the Incident Information Summary page, the assigned stage of the Workflow is displayed within the Status field, with the Next Action field displaying the options of where the Incident can move to. To view an assigned Workflow in its entirety select .

The system provides the following States:

Status	Description
SLA Timers On	
Open	The Incident is open. Incident timers are running and the automated SLA reminders, warnings and escalations will fire relative to the Triggers configured for the SLA.
Open - Restored	The Incident is still open as the issue is yet to be resolved, but a satisfactory temporary solution has been put in place. SLA triggers will fire for the SLAs Resolution Time, but the Restoration targets have been met for the Incident.
Pending	Work on the Incident has not yet begun. The Response-Time SLA trigger will fire for Incidents with this Status.
SLA Timers Off	
Pending - No Contract	A valid contract is not in place and one needs to be created or processed before work can commence on the Incident. Any changes to the Status will be recorded in the History tab.

Status	Description
Closed Restored	Though the basic issue remains, a satisfactory temporary solution has been reached and the Incident has been closed. SLA triggers will not fire for Incidents with this Status.
Closed Resolved	The issue has been resolved and the Incident has been closed. SLA triggers will not fire for Incidents with this Status.
On Hold	The Incident has been put on hold for some reason. SLA triggers will not fire for Incidents with this Status.
On Hold - Pending Approval*	<p>An Incident automatically moves to this State when the "Propose" button is used for sending an Incident Note. This means the CloseRequest email is sent to the Customer asking them to verify the proposed Solution. If the Customer does not respond to the email, the Incident is automatically closed by the number of days set within the Handshaking Privilege. (The email handshaking option is set by the Administrator in Setup>Privileges>Requests.)</p> <p>By clicking on the URL provided in the email, the Customer ensures the Incident retains an open and active State.</p>
On Hold - Process Escalated*	An Incident moves into this State when a Service Request, Problem or Change has been created within the Analysis tab of the Incident. The timer stops and there are no future States as the Incident will be closed when the related Problem or Change is closed.
Cancelled	The Incident has been cancelled. SLA triggers will not fire for Incidents with this Status.

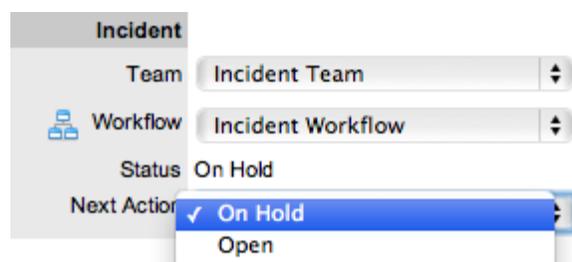
NOTE: When an Incident is created and assigned the default Incident Workflow, it is automatically assigned the Default Open State defined for the Workflow. The Default Open State can be customized for the Incident Workflow within Service > Workflows.

Updating an Incident's Status

To manually change an Incident's Status:

1. Select Operations > Incidents
2. Select the Request # hyperlink for the relevant Incident
3. Click Edit
4. From the Next Action drop-down list select the Incident's next Status

The States listed in Next Action are based on the Incident workflow and its lifecycle. To view the Workflow in its entirety click .



5. Click Save.

The system can automatically move an Incident into another State through the following actions:

- ♦ Using the Handshaking feature when a Note is added by selecting the Propose button to send and save a Note
- ♦ Closing an Incident when adding a Note using the Solution button
- ♦ Escalating an Incident to a Problem or Change Request
- ♦ When Billing is enabled and payment is not received.

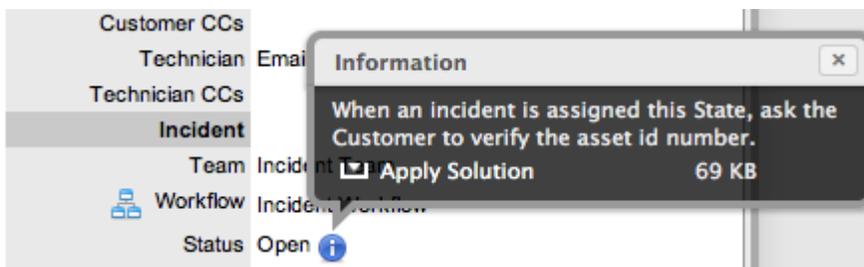
Incidents with a Pending-No Contract Status

Incidents logged with the system that do not have a valid Contract are assigned the Pending - No Contract Status. These Incidents are locked until a valid Contract is applied, and if relevant, paid. See: [Create a Contract](#)

Viewing a Status Note

When Incidents move into a State with a Status Note,  is displayed beside the assigned Status within the Summary tab of the Incident. Scroll over , to view the contents of the Status Note. If the Status Note includes an attachment, click the attachment name link in the pop-up window to

download it. Click  to close the window.



SLA Triggers and Incident Status

SLA Triggers fire for Incidents that are in a Workflow State that have the Service Timer Active option set to Yes. The default Timer Active set for systems States can be changed if relevant for the organization. For example, it may not be appropriate for an organization to have SLA Triggers fire when an Incident is moved to the system default On Hold State.

The following icons displayed in the Service Terms box, visually indicate how the Incident is tracking against the SLA and if the SLA timers are active:

Current SLA Status

	Workflow is in an SLA paused State. Triggers will not fire.
	Workflow is in an SLA timers on State. Triggers will fire.
	Workflow is in an Exit State and the SLA has been successfully met.
	Assigned SLA has been breached and Workflow is in an Exit State.

Supervisor Users can verify the Timer Active status of a Workflow by scrolling over the Status in the Workflow map available in the Summary Information screen, or within the Service>Workflows>selected Workflow> Lifecycle>selected Status screen.

Service	
SLA Active	<input checked="" type="radio"/> Yes <input type="radio"/> No
SLA Restoration	<input type="radio"/> Yes <input checked="" type="radio"/> No
SLA Resolution	<input type="radio"/> Yes <input checked="" type="radio"/> No

Priority

The Priority determines the timeframe in which an Incident should be handled and sets the service level targets adopted by the Incident that drive the SLA triggers and actions. It represents the degree of importance of the Incident to the Customer and also indicates the urgency of the request to the Technician.

An Incident can have one of four possible Priorities:

- ◆ Urgent
- ◆ High
- ◆ Medium
- ◆ Low.

Setting Incident Priority

The Administrator configures the options for determining the Priority within the Setup>Privileges>Request tab. The Priority options include:

- ◆ Selected Priority - where the system configured default Priority is applied to the request but can be manually adjusted by the User
- ◆ Derived Priority - where the Impact is derived from the Item Criticality and the User enters the Urgency, enabling the system to calculate the Priority.

Urgency: The value selected reflects how quickly a resolution is required

Impact: The value selected indicates the impact the Incident has on the User and Organization. The higher the Impact the higher the Priority to resolve the Incident.

If the Administrator has set the Request Priority option to Derived, the Priority of an Incident results from the Impact being mapped from the Criticality of the Item and then combined with the selected Urgency. However, if required, the Impact can be manually adjusted within the Incident Information screen to affect the Priority.

The following table displays the calculations applied by the system using the Item Criticality mapped directly to the Incident Impact, to determine an Incident's Priority:

Impact / Urgency	Urgent	High	Moderate	Low	Very Low
Critical	1.000	0.850	0.700	0.550	0.410
High	0.850	0.723	0.595	0.468	0.349
Moderate	0.700	0.595	0.490	0.385	0.287
Low	0.550	0.468	0.385	0.303	0.226
Very Low	0.410	0.349	0.287	0.226	0.168

The above calculations result in the following Priorities:

Priority	Upper	Lower
Urgent	1	0.83
High	0.83	0.58
Medium	0.58	0.34
Low	0.34	0

Incident Assignment and Escalation

When an Incident is logged within the system, it is allocated to the Team that is associated with the SLAs and Workflows applied to the Incident or to the default Team assigned to a Workflow State.

The appropriate Incident Workflow is assigned within the Incident Summary tab, by selecting an option from the Workflows drop-down list. This list is derived from the SLA assigned to the Customer, Organizational Unit and Item. Once the Workflow is selected, the associated Teams are available for assignment. Based on the Team assigned, a Technician in Layer One of escalation is allocated to work on the Incident. This can be adjusted manually, if required.

The Incident is automatically escalated according to the SLA assigned to the Incident and the triggers configured within the Priority of the SLA. An Incident is escalated if the assigned User exceeds the Escalation trigger point defined for the Response, Restoration or Resolution time of the assigned SLA, when the assigned Workflow State is an SLA Active State. Or, it can be manually escalated by a User, if required.

Incident Assignment

When an Incident is assigned to a User, the system follows a series of steps to look for the most appropriate Technician for the job, based on skill set, location and workload. The order of business logic is as follows:

1. The system will identify the Team associated with the Incident's SLA and associated Workflows
2. The system will find Technicians/Supervisors assigned to the Team
3. If Users are assigned to an Organizational Unit, the system will identify the Users that belong to the same Organizational Unit as associated with the Incident by the Customer assignment
4. If Classifications/Skills are assigned to Users, the system will find Technicians/Supervisors assigned to the Incident's selected Classification
5. Based on the Team configuration, if the Live Priority option is enabled for the Team, the system will look for a User who is logged into the system
6. The system verifies Work Hours/Availability of Users within the Team for appropriate Incident assignment
7. The system will assign the Request to the User who has the lowest workload, i.e., the fewest number of Open or Pending Incidents
8. If there is a tie, the system randomly allocates the Request to a User in the tie.

If a more appropriate Team member is available, the User assigned to the Incident can re-assign it manually by selecting a Technician from the drop-down Technician list in the Incident Information screen.

Note, if the Self Assign option is enabled for the Team, the system assignment logic is ignored and the User creating the request is automatically assigned the Incident.

Automated Escalation

An Incident's Service Level Agreement includes trigger points that set the rate at which automated escalations will occur for an Incident. Auto-escalation is triggered when the number of support hours specified for either an Incident's Service Level Response, Restoration or Resolution time is exceeded and the SLA Trigger action is set to Escalate. When it is escalated, the Incident is reassigned to a Technician in the next escalation level and an email is sent to the newly assigned Technician. This process repeats itself until either the Incident Status changes to an inactive State, for example, Closed - Resolved, On Hold, Closed Change Request, or until all of the Team's available escalation layers are exhausted.

Manual Escalation

If the Incident Team has more than one escalation layer, the Technician assigned to the Incident can escalate it to the next escalation layer by clicking the escalate icon next to the Technician name. If the Incident is allocated to a second layer of escalation or higher, the Incident can be returned to a lower escalation state by clicking the de-escalate button next to the Technician name.

An Incident's Technician and the Technician's Supervisor are able to reassign the Incident to one of the listed Technicians in the Technicians drop-down list by selecting their name and clicking Save to accept the change.



Escalation Control

If the Escalation Control functionality is enabled in Admin>Setup>Privileges>Requests, there is the option to enable or disable escalation within the Incident Information Summary screen.

NOTE: This option is only visible to Supervisor Users. Once an Incident is created, a Supervisor can elect to switch the Escalation option to Off. This means all SLA timers stop, which prevents escalation. Switching the option back to On will re-start the timer and reactivate the SLA triggers.

Notification

The Notify option sets the method of messaging used by the application to notify Customers and Technicians of the following changes to an Incident:

- ◆ Incident created
- ◆ Incident closed
- ◆ Incident deleted
- ◆ Incident Note added
- ◆ Incident escalated (Technician only).

The default Notification status of Incidents is set on a per Team basis, within the Users>Teams>Team Information screen, with the default recipients of new Notes being configured by the Administrator in the Setup>Email>Setup tab. However, this can be adjusted on a per Incident basis within the Notification Method field and on a per Note basis, when new Notes are created.

The methods of Notification can be set for Customers and Technicians, and include:

- ◆ None, which ensures no messages are sent
- ◆ Email, which means an email is sent containing the Incident detail updates
- ◆ SMS notifications, which sends an SMS message to Technicians and Customers about the Incident update. This is only available to Customers and Users who have a mobile number and a service provider entered in their User and Customer Information screen.

Notification	
Customer	Email [v] Customer [v]
Customer CCs	<input type="text"/>
Technician	Email [v] Technician [v]
Technician CCs	<input type="text"/>
Alternate Team	<input type="text"/>

Notifications can be sent to:

- ◆ Customer - the Customer who logged the Incident
- ◆ All Owners - all Customers who share the Item assigned to the Incident
- ◆ Customer CC's - email addresses to receive Customer email correspondence when the CC field is selected in the New Notes screen
This field may be automatically populated by the system with email addresses included in the CC list of the original email used to create the Incident. Multiple addresses should be separated by a comma.
- ◆ Current Team - notifications can be switched off, sent to all members within the Team assigned to the Incident, or restricted to members within the layer of escalation to which the Incident is assigned
- ◆ Technician CC's - enter any User account email addresses that are to be sent Incident Notifications. Multiple addresses should be separated by a comma
- ◆ Alternate Team - this option is visible if the Notify Alternate Team option is enabled in the Admin>Email>Setup tab. Notifications can be sent to a Team within the related Process, by the User selecting an option within the drop-down list.

The following is a sample email sent by the system to the Customer and assigned Technician, confirming the creation of an Incident. The message and template sent can be customized by the system Administrator:

Email Sample

Thank you for contacting our support department.

Your problem has been received and allocated to a technician. You will be notified via email of the progress, or you may login to our support site at any time to check the status of your incident.

Incident Information	
Incident #:	100053
Date Opened:	08/18/06 15:24 (mm/dd/yy hh:mm)
Classification:	Printing
Technician:	Supervisor User
Item #:	100005
Item Type:	word
Identifier:	
Customer:	Bob Samson
Company:	Sales
Due Date:	08/21/06 15:24
Description:	Whenever I try to print in Word, nothing happens.

Workflow

When an Incident is created it is assigned a Workflow that governs the lifecycle of the Incident. The SLA allocated to the Incident determines the Workflow options made available for the Incident. Before saving the Incident, the User can adjust the system assigned Workflow, if more than one Workflow option is available.

After the Workflow is assigned to the Incident, all stages of the assigned Workflow can be viewed by selecting . The Workflow map displays the entry points (blue boxes), transitional States (orange boxes) and exit points (red boxes).

The User moves the Incident through the Workflow Lifecycle by adjusting the options displayed in the Next Action field.

Moving through the Workflow

To move an Incident through the stages of the Workflow, in the Summary tab of the Incident Information screen:

1. Click Edit

The Next Action field with a drop down list of Status options is displayed below the Status field.

2. Click on the Next Action field

The Status options are displayed. This list is based on the configuration of the assigned Workflow.

Incident	
Team	TeamSMG
Workflow	Incident Workflow
Status	On Hold
Next Action	On Hold
	Cancelled
	On Hold
	Open
	Pending

3. Select a State
4. Click Save.

The selected Status is assigned to the Incident with the updated logic applied (i.e., the SLA Timers may now be active or inactive based on the newly assigned State configuration).

Assigning a State with an Underpinning Contract

Each State of a Workflow can be customized for either internal support contract management that is monitored by an OLA, or out-sourced to an external support provider, which is monitored by an Underpinning Contract.

When an Incident moves into a State that is governed by an Underpinning Contract, for internal contract control the Incident can be assigned to a Service Level Manager. This allows the Manager to maintain control of the Incident and to easily follow up with the external service provider, if required. The assigned SLM will be able to adjust the current Status, add Notes and update the Contract Monitor information in the Impact tab.

The screenshot displays two panels: 'Contact' on the left and 'Notification' on the right. The 'Contact' panel shows details for Lena Benson at Vodafone, with a 'Service Desk' item (Number 100002, Status Available, Criticality Moderate) assigned to Simone Supervisor (Service Level Manager). The 'Notification' panel shows an incident assigned to the 'Service Contractors' team, with a 'Next Action' dropdown menu open, showing 'Outsourced' selected. Red annotations explain that the due date (03/30/12 15:47) is calculated based on the Underpinning Contract assigned to the Workflow State, and the incident is assigned to the Service Level Manager because the 'Assign SLM' option is set to 'Yes' in the configuration.

Alternatively, the Workflow State can be configured for the Technician assigned at the time the Incident is moved to the Underpinning Contract State to maintain Incident editing privileges and manage adherence to the assigned service agreement. If the Workflow is configured for the responsibility of the Incident to be maintained by the Technician when the Incident is in an external contract state the Technician will be able to adjust the current Status, add Notes and, if the Technician is assigned the Internal Process of Service Level Management amend the Contract Monitor information in the Impact tab.

OLA Status Due

Within the Summary screen, the Status Due field is visible when a Workflow status is monitored by an OLA. The time, date and percentage remaining information displayed is calculated using the OLA's Target Resolution time.

Incident	
Team	Incident Team
 Workflow	Incident Workflow
Status	Investigating
OLA	Problem OLA
Status Due	03/30/12 16:58 (82% Remaining)

Team Assignment during the Workflow Lifecycle

To ensure that all Incidents are managed throughout the Workflow, the Team assigned to the Incident when it is first logged within the system is set as the default Team. If an Incident moves to a State that has an OLA assigned with a Team, the Incident is re-assigned to that OLA's Team. When the Incident moves out of the OLA State to a State where no OLA or Team is assigned, the Incident is re-assigned to the default Team.

Pending - No Contract Status

When the Contracts or Invoices functionality is enabled and an Incident is created, the system will verify the service entitlement status of the Customer and if a valid contract is not in place, the new Incident is assigned a Status of Pending-No Contract and locked until a valid contract is associated with the Incident.

In a request Group where the Customer and Organizational Unit does not have a Contract, if an Item applied to a request has a Contract and another does not, a relevant Status will be applied to each request. The User will be able to edit the request with a valid Contract, but the request without a Contract will be locked down to a Pending - No Contract Status, until a valid Contract is applied to the Incident.

Incident	
Team	Device-Incident Team
 Workflow	Incident Workflow
Status	Pending - No Contract

The Customer is automatically sent the NoContractCreateRequestSummary email when the Incident is saved with the Status. A reminder email can be sent by the Technician from within the Summary tab by clicking , when the Incident maintains this Workflow Status assignment.

Editing Incidents created by Email

To edit an Incident, click the Incident number or problem report hyperlink. The selected Incident will default to the Incident Information tab.

To edit your selection:

1. Click on the Edit button
2. Make the required changes such as: Assign the correct Item, Classification and Status
3. Click Save.

Grouping Incidents

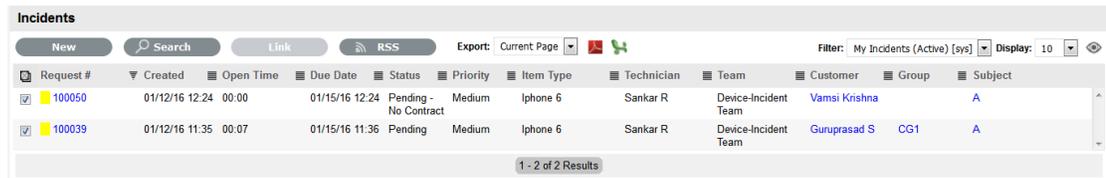
Incidents can be linked together to form project Groups when Incidents are related in some way (e.g., Incidents that have the same solution). New Groups must consist of Incidents that are not already linked.

Creating a New Group via the Incidents Tab

Within the Incidents list in the Incidents tab:

1. Tick the check boxes in the far left-hand column corresponding to unlinked Incidents
2. Click Link to group the Incidents.

A Group Number will be assigned and an instant Group hyperlink will appear under the Group column.



The screenshot shows a table of incidents with columns for Request #, Created, Open Time, Due Date, Status, Priority, Item Type, Technician, Team, Customer, Group, and Subject. Two incidents are listed, both with checkboxes in the far left column checked. The 'Link' button is visible above the table.

Request #	Created	Open Time	Due Date	Status	Priority	Item Type	Technician	Team	Customer	Group	Subject
<input checked="" type="checkbox"/> 100050	01/12/16 12:24	00:00	01/15/16 12:24	Pending - No Contract	Medium	Iphone 6	Sankar R	Device-Incident Team	Vamsi Krishna		A
<input checked="" type="checkbox"/> 100039	01/12/16 11:35	00:07	01/15/16 11:36	Pending	Medium	Iphone 6	Sankar R	Device-Incident Team	Guruprasad S	CG1	A

Adding Incidents to an Existing Group

To add Incidents to an existing Group within the Incidents list:

1. Check the boxes of the Incidents that are to be added to an existing Group and at least one Incident already included in the Group
2. Click Link.

NOTE: This will not work if Incidents representing more than one group are included. For instance, if you have two Groups (A and B) each with two Incidents (A1, A2, B1 and B2), and you want to add two unlinked Incidents to Group A, click the check boxes for the unlinked Incidents and either A1 or A2 or both. If B1 or B2 is also clicked, the linking process will fail because it will not know which group to add the two new Incidents to.

Merging Incident Groups

Existing Incident Groups can be merged within the Incident Groups tab, to allow all related Incidents within the Groups to be managed as one. To combine Incident Groups:

1. Go to Operations>Incident Groups
2. Check the fields next to the relevant Group #'s
3. Click Merge

The screen defaults to the Details tab for the Merge Group.

4. Set the Name, Item Type, Classification, Status, Priority and Description that best defines all associated Incidents
5. Click Save.

The History tab records details of the Groups merged to form the new Group. Click the No. hyperlink to view the details. The Impact tab records the Type and Number of requests associated with the Group.

Grouping Incidents

Incidents can be grouped by selecting the checkboxes next to the Request # column, followed by the Link button.

NOTE: Within the Home tab, the type of request Group created is based on the Request Type assigned to the Group.

- ◆ If the Group contains Incidents, it is an Incident Group
- ◆ If the Group contains Incidents/Change, it is a Change Group
- ◆ If the Group contains Incidents/Problem/Change, it is a Change Group
- ◆ If the Group contains Incidents/Problem, it is a Problem Group
- ◆ If the Group contains Problem/Change, it is a Change Group.

The system views the request hierarchy from low to high as Service Request, Incident, Problem and Change Request, and if a related request of a higher type is closed, all the lesser type requests are automatically closed, or if the handshaking facility is enabled for the system, moved to the Pending-Approval State.

Related Requests

Incidents that are included in an Incident Group, list the associated Incidents in the Related sidebar of the Incident Summary tab.

Grouping Incidents

- ◆ [“Creating a New Group via the Incidents Tab” on page 345](#)
- ◆ [“Adding Incidents to an Existing Group” on page 346](#)
- ◆ [“Merging Incident Groups” on page 346](#)
- ◆ [“Grouping Incidents” on page 346](#)
- ◆ [“Related Requests” on page 347](#)

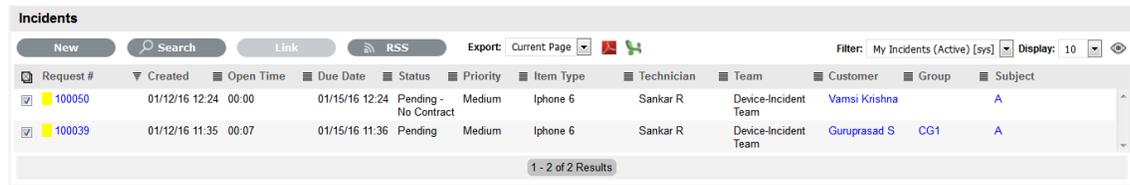
Incidents can be linked together to form project Groups when Incidents are related in some way (e.g., Incidents that have the same solution). New Groups must consist of Incidents that are not already linked.

Creating a New Group via the Incidents Tab

Within the Incidents list in the Incidents tab:

1. Tick the check boxes in the far left-hand column corresponding to unlinked Incidents
2. Click Link to group the Incidents.

A Group Number will be assigned and an instant Group hyperlink will appear under the Group column.



Request #	Created	Open Time	Due Date	Status	Priority	Item Type	Technician	Team	Customer	Group	Subject
<input checked="" type="checkbox"/> 100050	01/12/16 12:24	00:00	01/15/16 12:24	Pending - No Contract	Medium	Iphone 6	Sankar R	Device-Incident Team	Vamsi Krishna	A	
<input checked="" type="checkbox"/> 100039	01/12/16 11:35	00:07	01/15/16 11:36	Pending	Medium	Iphone 6	Sankar R	Device-Incident Team	Guruprasad S	CG1	A

Adding Incidents to an Existing Group

To add Incidents to an existing Group within the Incidents list:

1. Check the boxes of the Incidents that are to be added to an existing Group and at least one Incident already included in the Group
2. Click Link.

NOTE: This will not work if Incidents representing more than one group are included. For instance, if you have two Groups (A and B) each with two Incidents (A1, A2, B1 and B2), and you want to add two unlinked Incidents to Group A, click the check boxes for the unlinked Incidents and either A1 or A2 or both. If B1 or B2 is also clicked, the linking process will fail because it will not know which group to add the two new Incidents to.

Merging Incident Groups

Existing Incident Groups can be merged within the Incident Groups tab, to allow all related Incidents within the Groups to be managed as one. To combine Incident Groups:

1. Go to Operations>Incident Groups
2. Check the fields next to the relevant Group #'s
3. Click Merge
The screen defaults to the Details tab for the Merge Group.
4. Set the Name, Item Type, Classification, Status, Priority and Description that best defines all associated Incidents
5. Click Save.
The History tab records details of the Groups merged to form the new Group. Click the No. hyperlink to view the details. The Impact tab records the Type and Number of requests associated with the Group.

Grouping Incidents

Incidents can be grouped by selecting the checkboxes next to the Request # column, followed by the Link button.

NOTE: Within the Home tab, the type of request Group created is based on the Request Type assigned to the Group.

- ◆ If the Group contains Incidents, it is an Incident Group
- ◆ If the Group contains Incidents/Change, it is a Change Group
- ◆ If the Group contains Incidents/Problem/Change, it is a Change Group

- ◆ If the Group contains Incidents/Problem, it is a Problem Group
- ◆ If the Group contains Problem/Change, it is a Change Group.

The system views the request hierarchy from low to high as Service Request, Incident, Problem and Change Request, and if a related request of a higher type is closed, all the lesser type requests are automatically closed, or if the handshaking facility is enabled for the system, moved to the Pending-Approval State.

Related Requests

Incidents that are included in an Incident Group, list the associated Incidents in the Related sidebar of the Incident Summary tab.

Billing/Contracts

- ◆ [Contracts & Invoices](#)
- ◆ [Create a Contract](#)
- ◆ [Time Recorded](#)

Incident Groups

- ◆ [“Creating a New Group via the Incident Group Option” on page 348](#)
- ◆ [“Creating an Incident Group using a Group Template” on page 349](#)
- ◆ [“Analysis Tab” on page 353](#)
- ◆ [“Elements Tab” on page 354](#)
- ◆ [“Merging Incident Groups” on page 354](#)
- ◆ [“Closing an Incident Group” on page 355](#)
- ◆ [“Duplicated Incidents” on page 356](#)
- ◆ [“Multi-Item Requests” on page 356](#)

Incidents that are related can be linked together to form Groups. Once the Group has been created, the Incidents can be managed together. This may be relevant when multiple Incidents are:

- ◆ logged by Users of one department
- ◆ logged by one Customer
- ◆ related to a common Description or Solution.

NOTE: New Groups can only consist of Incidents that are not already associated with an existing Incident Group, unless the merge facility is used to combine existing Groups.

Users can group Incidents together manually through the Incident Group tab (as outlined below) or within the Incident List (see: [Grouping Incidents](#)). Incidents that have multiple Items assigned to them during the Incident creation process, are also listed within the Incident>Groups tab.

The system can also use its Analysis Engine to automatically link Incidents together based on criteria defined by the Administrator. Incidents auto-linked using the Analysis criteria result in the creation of a Problem Group, listed under the Problem tab.

Group #	Title	Item Type	Classification	Priority	Start Date	Close Date	Requests	Customers	Description
100007	CG1	iPhone 6	Account Details	Low	01/12/16 11:59		3	Vamsi Krishna Guruprasad S	CG1

1 - 1 of 1 Results

Creating a New Group via the Incident Group Option

To create a new Group via the Incident Group Option:

1. Select Operations>Incident Groups Tab
2. Click New

New Group

Details
Analysis
Elements

New Group

Use Template

Name

Item Type Item type not selected

Priority Low

Status Open

Custom 1

Custom 2

Custom 3

Description

Path: p Words: 0

Find Item Type (Name)

Cancel
Save

3. Enter a Name for the Group
4. Assign an Item Type, if applicable
5. Assign a Classification if an Item Type is selected
6. Assign a Group Priority
- The Status is set by default to Open.
7. Enter a Group Description
8. Click Save

The screen will default to the Analysis Tab, which allows the User to Group existing requests. The information displayed can be adjusted by using the Filter options.

Service Request Group - IG11

Details Analysis Elements

Add Search Filter: Unassigned Requests Display: 25

Request #	IP	Created	Status	Priority	Item Type	Technician	Team	Customer	Group	Subject
<input checked="" type="checkbox"/>		01/12/16 12:24	Pending - No Contract	Medium	Iphone 6	Sankar R	Device-Incident Team	Vamsi Krishna		A
<input checked="" type="checkbox"/>		01/11/16 10:19	Cancelled - Unpaid	Medium	Iphone 6	Joe K	BYOD-Incident-Team	Vamsi Krishna		A
<input type="checkbox"/>		01/08/16 14:58	Pending - CAB	Medium	Service Desk	Ingo Engels	Change Management Team	James Stewart		a
<input type="checkbox"/>		01/07/16 11:29	Closed - Resolved	Medium	Service Desk	Kamal K	Device-Incident Team	James Stewart		A

9. Check the field next to the relevant Request # to add the request to the Group
10. Select Add
11. Click Done to record the new Incident Group.

Creating an Incident Group using a Group Template

An Incident Group can be created using a Group Template. A Group Template contains a series of tasks in the form of Quick Calls. For more information, see: [Group Templates](#).

Tasks within the Group Template can be created simultaneously or sequentially in the system. If the In Sequence option is used, the first task within the Group Template is created when the Template is selected. When the first task is closed, the next Task within the Template is automatically created and so goes the auto-creation process until all tasks within the Template have been created and closed in sequence.

To create a new Group using a Group Template:

1. Select Operations>Incident Groups tab
2. Click New
The New Group editor is displayed.
3. Select the Use Template checkbox
A list of Group Templates is displayed.

New Group

Details Analysis Elements

New Group

Use Template [Dropdown]

Name

Item Type

Classification

Status

Priority

Custom 1

Custom 2

Custom 3

Description

Format [Dropdown] Font Family [Dropdown] Font Size [Dropdown] | HTML

A **B** *I* U ABC | [List] [List] [Quote] | [Align] [Align] [Align] | x_1 x^2

Path: p Words:0

Cancel Next

4. Select an appropriate Template

The Group details are listed.

5. Enter a Name, as unique identifier for this Group

The selected requests for the Group are displayed. These requests are the Quick Calls assigned to the Group Template.

New Group

Details Requests Analysis Elements

Use Template G1

Name | G1

Item Type Iphone 6

Classification General

Status Open

Priority Medium

Custom 1

Custom 2

Custom 3

Description |

Format Font Family Font Size HTML

A **B** *I* U ABC

Group 1 description.

Path: p Words:2

Cancel Next

6. Click Next

New Group

Details Requests Analysis Elements

G1

Find Customer

First Name | | Email | |

Last Name | | Phone | |

Username | | Org. Unit | |

Supported Org. Units Only

Cancel Save

7. Search and select the Customer to be associated with the tasks included in the template
(If the Customer details are not in the database and are to be created as part of the tasks included in the template, assign a default customer and update the details in the Customer tab of the Request, when the Customer details exist in the system.)
8. The Selected Requests for the Group are displayed.
These requests are the Quick Calls assigned to the Group Template. To exclude any of the requests from the newly created Group, deselect the checkbox next to the Template name.

New Group

Details Requests Analysis Elements G1

Customer

Name Sachin Kumar
 Email sachin@nsd.com
 Phone
 Address
 City
 State
 Zip
 Country

Selected Requests

	Order	Template	Status	Priority	Classification	Duration
<input checked="" type="checkbox"/>	1	G1	In Progress	Medium	Question	12
<input checked="" type="checkbox"/>	2	Qc1	In Progress	Medium	Question	12

1 - 2 of 2 Results

Creation On Save In Sequence

Details

Service Request Custom 1

Service Request Custom 2

Service Request Custom 3

9. Select the Creation option:

- ◆ On Save for all the requests to be created when the Request Group is saved
- ◆ In Sequence for the first request to be created when the Request Group is saved.

10. Click Save

The Group is created including all Quick Call Requests. To add or remove Incidents to or from the Group, use the Analysis and Elements tabs (Covered below).

The type of Group created, whether it be a Service Request, Incident or Change Group will depend on the Quick Call tasks assigned to the Group Template.

For example:

If there is a mix of Service Request and Incident Quick Calls, the Group will become an Incident Group;

If there is at least one Change Quick Call, the Group will become a Change Group.

If an Incident is related to a Problem or Change Request within a Group and that related request in the other Process is closed, the Incident will be automatically closed. The system views the request hierarchy from low to high as Service Request, Incident, Problem and Change Request, and if a related request of a higher type is closed, all the lesser type requests are automatically closed.

Analysis Tab

Incidents can be linked to a Group within the Analysis screen of an Incident Group. To search for Incidents to add to the Group, use the system filters or the Search option. The system filter includes the following:

Unassigned Requests	Description
Project Requests	Incidents that have been assigned to the Incident Group/Project.
Unassigned Requests	All Incidents that exist in the system and have not been assigned to the Group.
Potential Requests - Item Type & Classification	Incidents in the system that match the Item Type and/or Classification of the Group.
Potential Requests- Keyword match	Incidents with keywords that match between the Incident Description and the Group Description. NOTE: The match is only performed on the first 250 characters of the description.
All Incidents (sys)	Lists all Incidents in the system irrespective of Workflow State or User assignment. Note that this option is not visible to Technicians when the privilege to View All Requests is disabled by the Administrator.
Incident Queue (sys)	Displays Incidents assigned to the System User by default, which Technicians can reassign after viewing. (This is only available if the functionality is enabled for the system and Team.)
My Incidents (Active) (sys)	Displays all Incidents in an active Workflow State that are assigned to the logged-in User.
My Incidents (All) (sys)	Displays all Incidents, in active and inactive Workflow States, that are assigned to the logged-in User.
My Teams Incidents (Active) (sys)	Displays all Incidents in an active Workflow State, allocated to the Teams with which the User is associated.
My Teams Incidents (All) (sys)	Displays all the Incidents, in active and inactive Workflow States, allocated to the Teams with which the User is associated.

To link Incidents within the Incident Group Analysis tab:

1. Go to Operations>Incident Groups
2. Select the Incident Group # link
3. Move to the Analysis tab
4. Choose the Filter option

Service Request Group - IG11												
Details			Analysis			Elements						
Add		Search		Filter: Unassigned Requests							Display: 25	
Request #	IP	Created	Status	Priority	Item Type	Technician	Team	Customer	Group	Subject		
<input checked="" type="checkbox"/>		01/12/16 12:24	Pending - No Contract	Medium	Iphone 6	Sankar R	Device-Incident Team	Vamsi Krishna		A		
<input checked="" type="checkbox"/>		01/11/16 10:19	Cancelled - Unpaid	Medium	Iphone 6	Joe K	BYOD-Incident-Team	Vamsi Krishna		A		
<input type="checkbox"/>		01/08/16 14:58	Pending - CAB	Medium	Service Desk	Ingo Engels	Change Management Team	James Stewart		a		
<input type="checkbox"/>		01/07/16 11:29	Closed - Resolved	Medium	Service Desk	Kamal K	Device-Incident Team	James Stewart		A		

5. Select the Incident checkbox on the left
6. Click the Add button
7. Click Done.

The screen defaults to the Groups list.

Elements Tab

The Elements tab displays all the requests that belong to the Incident Group. From this screen, any request can be removed.

To remove a request:

1. Go to Operations>Incident Groups
2. Select the Incident Group # link
3. Move to the Elements tab
4. Select the checkbox of the relevant Incident.

Request #	IP	Created	Status	Priority	Item Type	Technician	Team	Customer	Group	Subject
<input type="checkbox"/>		01/11/16 15:01	Cancelled - Unpaid	Medium	Iphone 6	Sankar R	Device-Incident Team	Vamsi Krishna	CG1	sdfs
<input type="checkbox"/>		01/12/16 11:12	On Hold	Medium	Iphone 6	Ingo Engels	BYOD-Incident-Team	Vamsi Krishna	CG1	A
<input checked="" type="checkbox"/>		01/12/16 11:35	Pending	Medium	Iphone 6	Sankar R	Device-Incident Team	Guruprasad S	CG1	A

1 - 3 of 3 Results

Done

5. Click the Remove button.

Merging Incident Groups

Existing Incident Groups can be merged within the Incident Groups tab, to allow all related Incidents within the Groups to be managed as one.

To combine Incident Groups:

1. Go to Operations>Incident Groups
2. Check the fields next to the relevant Group #'s
3. Click Merge

The screen defaults to the Details tab for the Merge Group.

4. Set the Name, Item Type, Classification, Priority and Description that best defines all associated Incidents
5. Click Save.

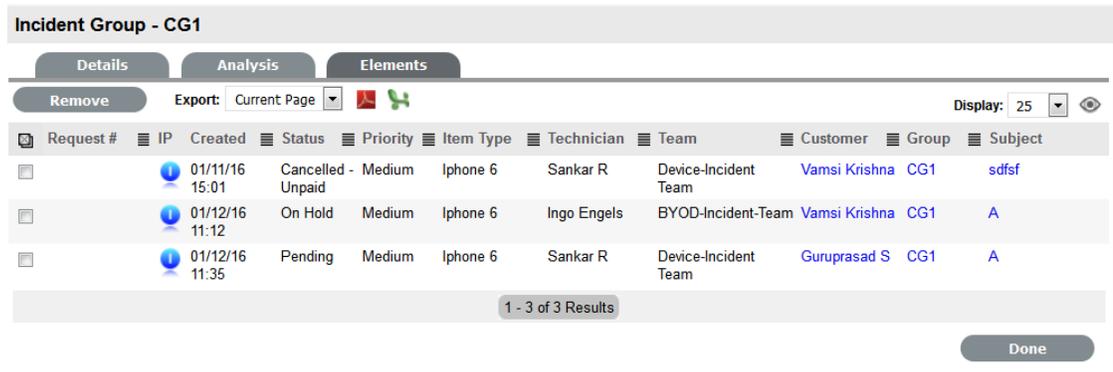
The History tab records details of the Groups merged to form the new Group. Click the No. hyperlink to view the details. The Impact tab records the Type and Number of requests associated with the Group.

Closing an Incident Group

An Incident Group is automatically closed when all Incidents included in the Group are closed.

To close a Group:

1. Go to Operations>Incident Groups
2. Select the Incident Group # link
3. Move to the Elements tab



The screenshot shows the 'Incident Group - CG1' interface. At the top, there are three tabs: 'Details', 'Analysis', and 'Elements', with 'Elements' selected. Below the tabs are buttons for 'Remove' and 'Export', and a 'Display: 25' dropdown. A table lists incident details with columns for Request #, IP, Created, Status, Priority, Item Type, Technician, Team, Customer, Group, and Subject. Three incidents are listed, all for 'Iphone 6' and 'Vamsi Krishna'.

Request #	IP	Created	Status	Priority	Item Type	Technician	Team	Customer	Group	Subject
		01/11/16 15:01	Cancelled - Unpaid	Medium	Iphone 6	Sankar R	Device-Incident Team	Vamsi Krishna	CG1	sdfs
		01/12/16 11:12	On Hold	Medium	Iphone 6	Ingo Engels	BYOD-Incident-Team	Vamsi Krishna	CG1	A
		01/12/16 11:35	Pending	Medium	Iphone 6	Sankar R	Device-Incident Team	Guruprasad S	CG1	A

4. Select a Request # hyperlink
The Summary tab of the Incident is displayed.
5. Click Edit
6. Within the Related sidebar check all related Incidents



The screenshot shows the 'Related' sidebar with 'Bulk' and 'Unlink' buttons. Below are two incident entries, both for 'Vamsi Krishna' and 'Iphone 6', with checkboxes selected.

Customer	Item Type
Vamsi Krishna	Iphone 6
Vamsi Krishna	Iphone 6

7. Select the Bulk option
The Bulk Editor screen is displayed.
8. Select the Status of Closed - Resolved or desired Workflow Exit State

Editing Multiple Requests

Customer Contract Analysis

Details

Priority Medium

Impact Moderate

Urgency Moderate

Workflow Incident Workflow

Status

Team

Notification

Customer

Customer CCs

Technician

Technician CCs

Alternate Team

Cancelled
Cancelled - Unpaid
Closed - Resolved
Closed - Restored
On Hold
On Hold - Client Action
On Hold - Pending Approval
On Hold - Process Escalated
Open
Open - Restored
Pending
Pending - No Contract

9. Click Save
10. Click Save and Done.

The Details tab of the Group now displays a Status of Closed - Resolved.

Duplicated Incidents

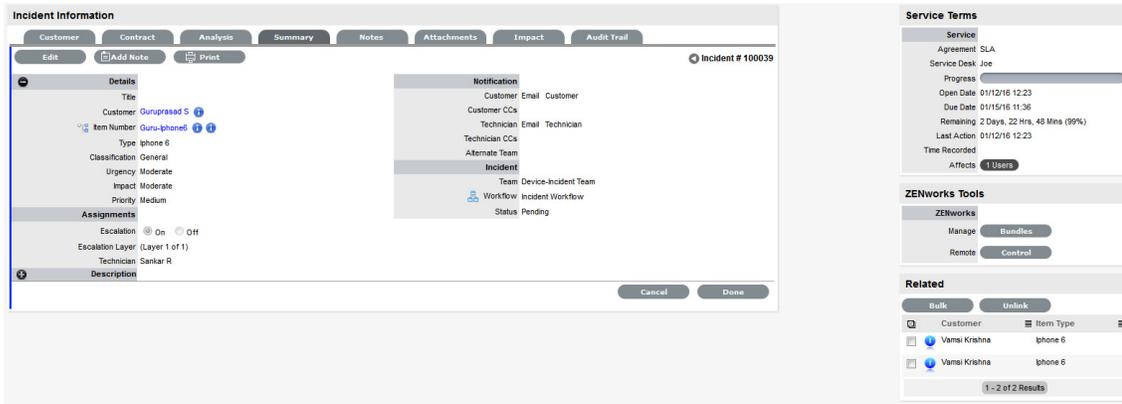
When an Incident is duplicated, the new Incident is linked with the original Incident creating an Incident Group. Incidents can be unlinked in the Group's Elements tab.

Multi-Item Requests

Displayed within the Incident Groups List View are any Groups that are created as Multi-Item Requests. These requests allow for multiple Items to be assigned during the Incident creation process, and result in separate Incidents being created for each Item assigned to the initial Incident, which are then displayed within the Related Requests window of the Incident Information screen.

The Incidents are managed as individual Incidents to cater for any special requirements relative to each Item. For example, consider a situation where a Team rolls-out an update in an organization. In this instance, during the Incident creation process multiple Items are assigned to a single Incident, which the system automatically allocates to separate Incidents that are then managed on an individual basis. This allows appropriate Teams/ Technicians to be assigned to the Incidents relative to their skill-set or departmental assignments. The implementation process more effectively differentiates between the tasks and Items being modified and ensures each Item has its own Audit Trail, Attachments and Notes for future reference.

Multi-Item Requests are also listed as separate Incidents within the Incidents List View.



Multi-Item Requests are created like a single Item Request, but have more than one Item assigned during the Incident creation process.

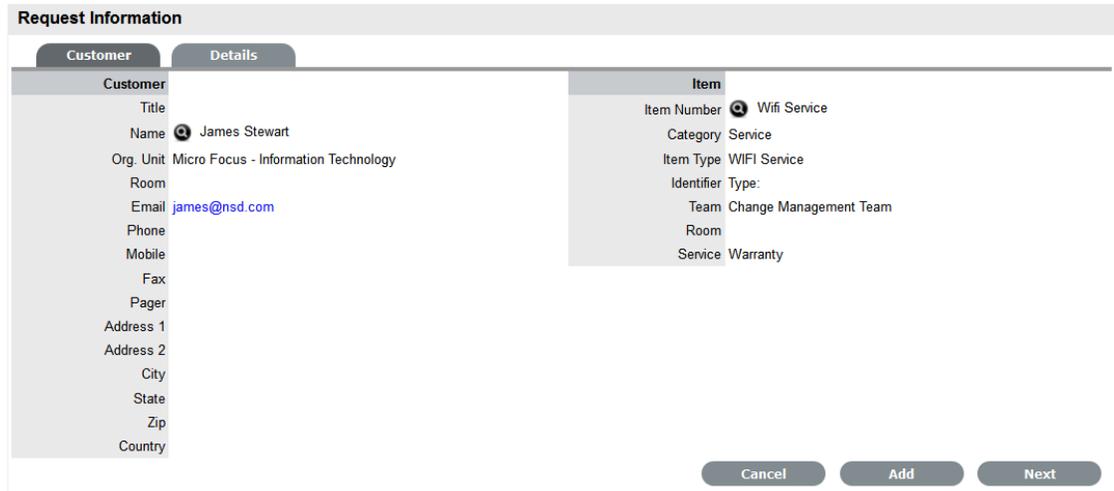
Multi-Item Request Item Assignment

After assigning a customer to an Incident move to the Find Item field to assign Items to the Incident.

1. Click the relevant Item link if listed below the Find Item search box

Or, [Search for an Item](#) or click to [Create an Item](#).

NOTE: The option to create an Item is only available to Technicians if the system Administrator has enabled the Create Items option within the Setup>Privileges>User screen.



2. Click Next to move to the Details tab if only one Item is to be assigned to the Incident

Or, select Add to assign additional Items. If Add is selected, a Request Selections window will be displayed that lists all the current Items assigned to the Incident.

Selections		
Customer	Item No.	Item Type
James Stewart	Wifi Service	WIFI Service

1 - 1 of 1 Results

- Continue to add all the relevant Items to the Incident and then select Next to move to the Details tab

Within the Details tab the Incident is profiled by assigning a Classification and Description.

Request Information

Customer Details

Request

Request Type: New Incident

Classification: General

Subject:

Description:

Format: Font Family: Font Size: HTML

Path: p Words: 0

Cancel Done

- Select the Classification, enter the Subject and Description
- Click Done to enter all Requests simultaneously.

The Requests are created individually and automatically applied to a Group.

2.4.3 Problem Management

- ♦ [“Implementing Problem Management” on page 359](#)
- ♦ [“Problems” on page 361](#)

Problem Management extends the process of Incident Management. An Incident is a non-standard operational event with the potential to harm the quality of an IT service. Incidents are reported by end-Users, encountered by technicians and system/database Administrators, or automatically detected by system management tools. In all instances, Incidents should be reported to the Service Desk.

A Problem describes the underlying cause of one or more Incidents that are being investigated. However, not all Incidents are investigated as Problems. For example, if the power-supply in a desktop computer blew up, it should be treated as an Incident, and the power-supply replaced. (Although if the power-supply is controlled by Change Management, it would need to be treated as a minor change request.) However, if there was a spate of burnt-out power-supplies in the same model desktop, then an underlying Problem with the desktop may possibly exist and further investigation into the cause and potential solutions may be required.

For Incidents to be correctly categorized as a Problem, organizations must define the evaluation criteria. For example, raise a Problem if more than 10 Incidents are logged in the space of three hours that refer to the same Configuration Item.

After the underlying cause of a Problem has been diagnosed, it is referred to as a Known Error. At this point, the root cause of the Problem is known, and the most appropriate course of action is to be determined. This may take the form of a structural resolution by raising a request for change (RFC). Alternatively, it may be decided, after consultation with Users and Customers, to implement a workaround or recovery action.

In the case of the above example:

- ♦ *Problem:* Brand X Desktops no longer operating
- ♦ *Root Cause:* Faulty power-supply in July '09 models
- ♦ *Known Error:* Warranty - replace with new power-supply.

As part of the Problem Management Process, if a Problem is related to a Change Request and that related Change Request is closed, the Problem will be automatically closed. The system views the request hierarchy from low to high as Service Request, Incident, Problem and Change Request, and if a related request of a higher type is closed, all the lesser type requests are automatically closed.

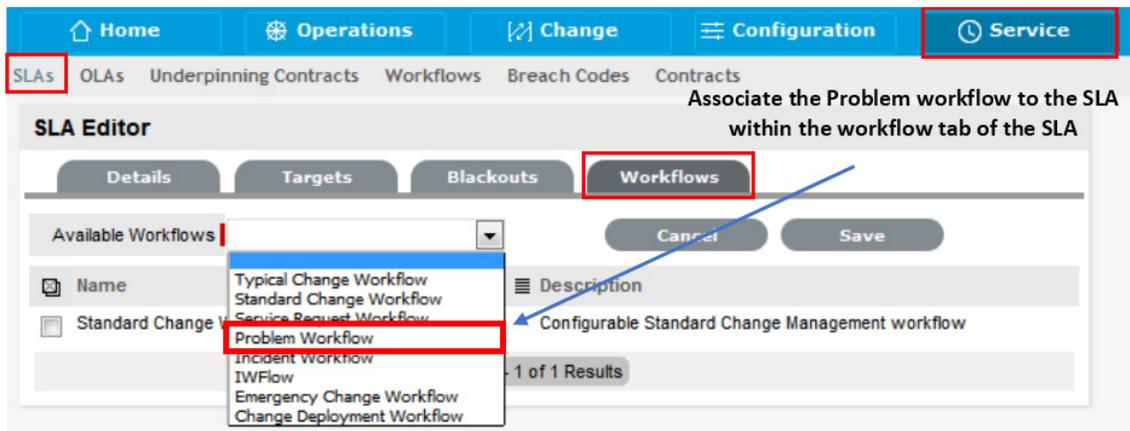
Implementing Problem Management

To set up the Problem Management Process in the system, the following steps are to be completed:

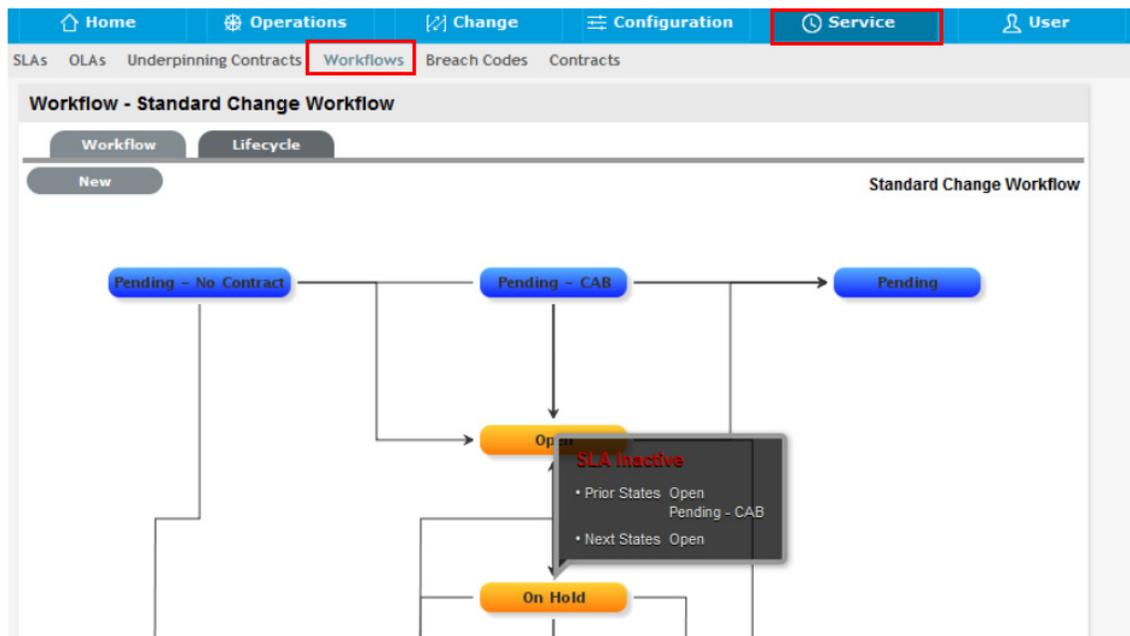
1. Assign the Problem Management Process to the relevant Users within the User Information screen under the User>Users tab. (See:[Create a User.](#))

The screenshot shows the 'User Information' screen for a user named Joe K. The 'Users' tab is selected. The 'Problem' checkbox under 'Operations Processes' is checked. A blue arrow points to the 'Problem' checkbox with the text 'Assign the Problem Process to the user within the user Information screen.'

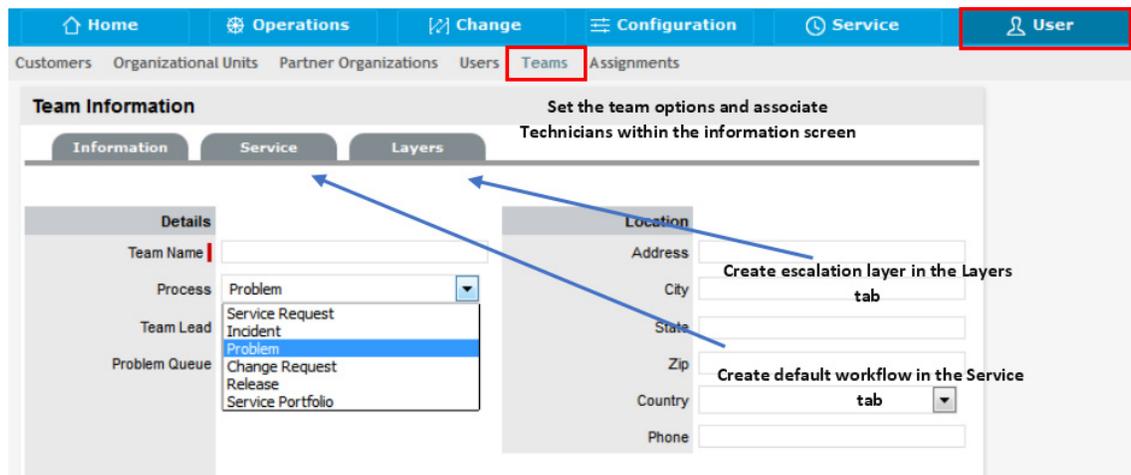
2. Create or review the SLA within the Service>SLAs tab, and associate the Problem Management Workflow to the SLA in the SLAs Workflow tab. (NB: The Supervisor User setting up the SLA must be assigned the Internal Process of Service Level in their User Information screen to complete this action.)



- Review the Problem Management Workflow within the Service>Workflows tab. (See: [Problem Management Workflow](#).)



- Create a Problem Management Team within the User>Teams screen. (See: [Problem Management Team](#).)



5. Associate the SLA to an Item or Customer or Org Unit. This final step ties all the elements together when a Problem is created, as the SLA associated with the Item, Customer or Org Unit assigned to the Problem determines the Workflow, Team and Technicians that are made available within the Problem Information screen.

Problems

- ◆ [“Problems - Individual or Group” on page 362](#)
- ◆ [“Creating a Problem:” on page 362](#)
- ◆ [“Problem Queue” on page 363](#)
- ◆ [“Problem Search Tips:” on page 363](#)
- ◆ [“RSS Feeds” on page 363](#)
- ◆ [“Customer Tab” on page 363](#)
- ◆ [“Item Information” on page 365](#)
- ◆ [“Quick Calls” on page 367](#)
- ◆ [“Contract Tab” on page 368](#)
- ◆ [“Details Tab” on page 369](#)
- ◆ [“Analysis” on page 370](#)
- ◆ [“Summary Tab” on page 381](#)
- ◆ [“Notes Tab” on page 388](#)
- ◆ [“Attachments Tab” on page 392](#)
- ◆ [“Impact Tab” on page 393](#)
- ◆ [“Audit Tab” on page 397](#)
- ◆ [“Elements Tab” on page 399](#)



The Problem tab defaults to display all Problems logged with the system. The other available List Filters include:

Filter	Description
All Problems	Displays all Problems logged in the system regardless of their Status or Assignment.
My Problems (Active)	Displays all Problems in an active Workflow State that are assigned to the logged-in User.
My Problems (All)	Displays all Problems, in active and inactive Workflow States, that are assigned to the logged-in User.
My Teams Problems (Active)	Displays all Problems in an active Workflow State, allocated to the Teams with which the User is associated.
My Teams Problems (All)	Displays all the Problems, in active and inactive Workflow States, allocated to the Teams with which the User is associated.
Problem Queue	Displays Problems assigned to the System User by default, which Technicians can reassign after viewing. (This is only available if the functionality is enabled for the system and Team.)

The default display is ten Problems per batch. The list can be re-sorted by clicking on a column header and the number of Problems displayed per batch can be altered using the Display pop-up option.

Problems - Individual or Group

Problem Management is :

- ◆ Used to manage an ongoing or immediate situation where there is significant impact to business services or IT infrastructure
- ◆ Created when more than one Incident has been raised around the same issue
- ◆ Used to find a solution to all the related Incidents
- ◆ Differentiated from an Incident group, in that, a Problem is created to work on the cause of the Incidents within the Problem
- ◆ An internal service management investigation process, which does not typically involve any Customer updates, except upon resolution.

Problem Management can also be used pro-actively to prevent Problems by identifying related or recurring Incidents.

When a Problem is created, a Problem Group is automatically generated. The Group is used as a container for all requests that relate to the same underlying issue. The name assigned to the Group is the Problem ID e.g. Problem #100067. The Problem Group can be edited under the Error tab or via the Problem itself.

Creating a Problem:

To create a Problem within the Problem>Problems tab, the following information is required:

- ◆ [Customer Details](#)
- ◆ [Item Details](#)

- ◆ [Contract Details](#)
- ◆ [Classification and Description.](#)

Problem Queue

Problems that are created by the Users through the User Portal can be forwarded to a holding bay or queue, if this functionality is required by the Service Desk. The capability can be enabled system-wide but applied on a per Problem Team basis, as needed.

See: [Queues](#).

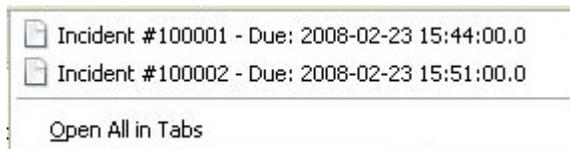
Problem Search Tips:

- ◆ The Problem search option has a default Status to search only Active requests. To ensure search success, select the relevant Incident Status, if unsure, select All
- ◆ To search for multiple Problem numbers at once, insert a comma separator between Problem numbers
- ◆ To search based on a Problem status, select the Problem Workflow option from the Workflow drop-down list. Once selected, a list of States is displayed
- ◆ To search by Classification, select an Item category from the Category drop-down list. After the category is chosen, a list of Problem Classifications is displayed
- ◆ To search based on the content of a Problem Description, select the Full Text option within the Search and enter a relevant term (See: [Full text searches.](#))
- ◆ To search using an Item's Custom field information, select the Item Category to display any Custom Fields enabled for that Item.

RSS Feeds

To easily access up to the minute details regarding Problem activity within an RSS feed browser bookmark, Users can subscribe to RSS feeds by selecting the RSS button within the Problems list. When the RSS button is selected, Users are presented with the application options for subscribing to receive the information and where the Recent Activity information is to be accessed. To readily access the information through a browser window, save the feed the to the Bookmark Bar.

The following is an example of the information obtained by clicking on the RSS bookmark:



For each Problem, the following tabs are available:

Customer Tab

The first step in creating a new Problem requires that a Customer be assigned to the Problem. There are two ways to assign a Customer to a Problem, either search and select an existing Customer or create a new Customer.

Create a Problem for an existing Customer

To search for and assign a Customer who already exists in the system:

1. Go to Problem>Problems
2. Click New
3. Search and select a Customer

Within the Find Customer field, enter any known Customer details or leave the search field blank to access the complete Customer list. If Custom Fields have been enabled in the Customer Information screen, the Advanced Search option can be used to search on data recorded within these fields.

Name	Phone	Org Unit
James Stewart		Micro Focus - Information Technology
Jason Blackett		Micro Focus - Information Technology

4. Click to search the Customer database
5. Select the relevant Customer Name hyperlink to assign the Customer details to the Problem.
The screen will open the Find Item field.

See: [Advanced Search Options](#)

Create a Problem for a new Customer

If the Customer does not exist within the system, an account can be created when entering the Problem:

1. Select Problem> Problem
2. Click New
3. Within the Find Customer field, select .
An expanded editable Customer Details form is displayed.
4. Enter the Customer details
5. Click Save
The form will revert to a non-editable screen of the newly entered details.
6. Click Next to assign an Item to the Problem. Or select Quick Call if a template is to be used.

Supported Org Units Only option

This option is visible within the Find Customer search field, if the logged in User has been assigned to support specific Organizational Units. Uncheck the option, if search results are to include Customers belonging to all Organizational Units recorded in the system.

Find Customer

First Name	Email
<input type="text"/>	<input type="text"/>
Last Name	Phone
<input type="text"/>	<input type="text"/>
Username	Org. Unit
<input type="text"/>	<input type="text"/>

Supported Org. Units Only 

Item Information

After the Customer details are assigned to the Problem, an Item is assigned to the Problem. This assignment associates all the relationships of the Item, including service level agreements and assigned support Team, to the Problem.

If the Customer assigned to the Problem owns any Items they will be listed below the Find Item search box. By default, the list is defined by the All Assigned Items option. It is also possible to search by:

- ◆ All Items
(Only visible if the Search All Items option is enabled within Admin>Setup>Privileges>User tab.)
- ◆ All Assigned Items (Customer and Organizational Unit)
- ◆ Assigned Items by Customer

◆ Assigned Items by Organizational Unit.

The screenshot shows the 'Request Information' interface with two tabs: 'Customer' and 'Details'. The 'Customer' tab is active, displaying the following information:

- Title
- Name: James Stewart
- Org. Unit: Micro Focus - Information Technology
- Room
- Email: james@nsd.com
- Phone
- Mobile
- Fax
- Pager
- Address 1
- Address 2
- City
- State
- Zip
- Country

The 'Details' tab is also visible, showing a 'Find Item' search interface with the following options:

- Item Number: [Input field]
- Item Type: [Input field]
- Include Global* Items
- Active Items Only
- All Items
- All Assigned Items
- By Customer
- By Org. Unit
- Category: Mobile Devices
- Advanced Search
- Field: Memory Card
- Value: [Input field]
- Field: IMEI Number
- Value: [Input field]

Below the search options, there is a table of results:

Item #	Item Type	Identifier	Status
Service Desk	Service Desk		Available
Wifi Service	WIFI Service	Type:	Available

At the bottom of the search results, it indicates '1 - 2 of 2 Results' and a 'Cancel' button is present.

The list can be filtered using the Include Global* Items option. This will display Items that are available to all Users in the system, as they have not been assigned to a specific Customer or Organizational Unit. It can also be filtered using the Active Items Only option, which means only Items that are assigned an active lifecycle state are displayed if the option is checked.

Problem Item Assignment

To assign an Item to the Problem:

1. Click the relevant Item link if listed below the Find Item search box

Or, [Search for an Item](#) or Click to [Create an Item](#)

NOTE: The option to create an Item is only available to Technicians if the system Administrator has enabled the Create Items option within the Setup>Privileges>User screen

1. When the Item is assigned to the Problem, click Next to move to the Details tab.

The Classification and Description are now to be entered for the Problem.

Quick Calls

- ◆ [“Quick Calls and Item Assignment” on page 367](#)

Quick Calls are used for common requests that are logged using a template during the Problem creation process.

If the Quick Call functionality is enabled for the system, after the Customer and, if relevant, Item details are assigned to a Problem, within the Details tab the Quick Call options are displayed below the dashed line in the Request Type drop-down list.

Quick Calls and Item Assignment

If the Item is to be assigned to the Problem using the Quick Call Template configuration, the User simply selects the Next button after assigning the Customer information to the Problem. The application moves to the Details tab and within the Request Type options, the list displayed only includes Templates that have Items preset.

NOTE: The Next button will only be visible after the Customer has been assigned to the Problem, if Quick Call templates that have Items assigned are configured in the system.

If a specific Item is associated with the Quick Call Request within the Customer tab, the options displayed within the Request Type drop-down list will include Quick Call templates associated with the Item Type already assigned to the Problem, and templates assigned the Unknown Item..

For Problems created with multiple Items assigned that use different Items, Quick Call templates with no Items assigned are displayed. For Problems where the same Item is assigned on multiple occasions, Quick Call templates that have the matching Item and no Items assigned are made available in the Request Type drop-down list.

To create a Problem Request using a Quick Call:

1. After allocating a Customer and Item(s) if required, click Next to move to the Details tab

2. Within the Request Type drop-down list, select the relevant Quick Call template displayed below the dashed line
3. Select the Classification
4. Click Done.

All Problem details will be populated according to the Quick Call template. Any amendments can be made through the Problem Summary screen.

NOTE: When saved, the Problem created using the Quick Call template can be duplicated, to minimise data entry requirements for multiple similar Problems.

Contract Tab

When Contracts are enabled for the system, the Contract tab is visible within the Problem Information screen.

The Contract tab of a Problem includes the details of the Contract Type and SLA assigned to the Problem. If a valid contract is active for the Customer, Item or Organizational Unit assigned to the Problem, then the details of the contract will be displayed. If an SLA is not assigned to the Customer, Item or Org Unit and the Billing functionality is not enabled, the system automatically applies a default SLA based on the Item Type or the system default SLA.

Problem Information

Customer Contract Analysis Summary Notes * [1] Attachments Impact

Audit Trail

Contract

Contract Type Per Request

Service Level SLA

SLA Price \$1,400.00

Taxable

Targets

Priority	Response Time	Restoration Time	Resolution Time	24 x 7 support	Alert
Urgent	6 Hours	12 Hours	24 Hours	Yes	None
High	12 Hours	24 Hours	48 Hours	Yes	None
Medium	18 Hours	36 Hours	72 Hours	Yes	None
Low	24 Hours	48 Hours	96 Hours	Yes	None

Cancel Save

When Billing is enabled and the Contracts or Invoices functionality is active, the system verifies the service entitlement status of the Customer assigned to the Problem, and if a valid contract is not in place, the Problem is assigned a status of Pending-No Contract and locked until a valid contract is associated with the Problem. The assigned Technician is automatically sent the NoContractCreateRequestSummary email when the Problem is saved with this Status. If the Self Mail option is enabled, the message is sent to the Technician who logged the Problem and the assigned Technician.

Problem

Team Problem Team

Workflow Problem Workflow

Status Pending - No Contract

Cancel

For more detailed information about contracts and billing, see [Contracts](#).

Details Tab

- ♦ [“Entering a Problem Description” on page 369](#)
- ♦ [“Request Subject” on page 370](#)

To successfully create a Problem, the Problem must be profiled by completing the Request Type, Classification and Description details. Within the Details tab, there is also the option to select any relevant Quick Call Templates that have been configured for the Item Type assigned to the Problem.

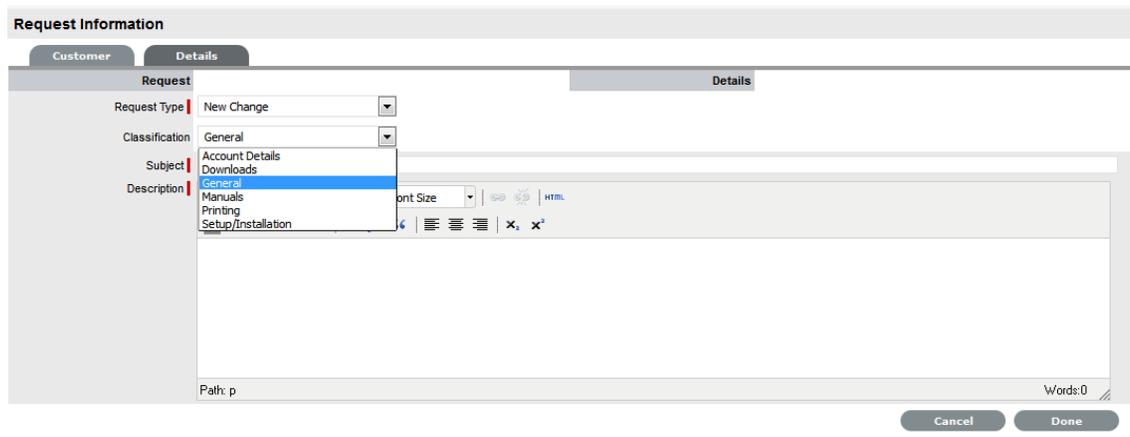
Entering a Problem Description

To profile the Problem:

1. Define the Request Type

The New Problem option is locked in if there are no Quick Call templates available for the Item or Process.

2. Select a Classification

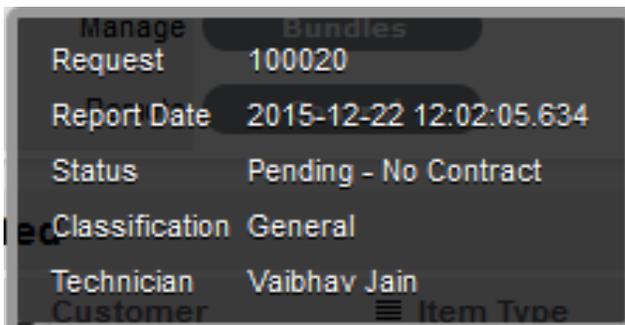


3. Complete any required customized fields
4. Define the Subject content, if desired
5. Enter all relevant information within the Description field
This is a mandatory field.
6. Click Done to enter the new Problem into the database.

A unique reference number is automatically generated for the request at this point. When a Problem is submitted successfully, the Problem Summary Tab is displayed. If the Force Analysis functionality is enabled in the application's Setup, the system will move to the Analysis Tab.

Request Subject

It is recommended that a summary be included in the Subject field, as the details recorded in the Subject field are displayed in scroll-over summaries throughout the application. For example, when a new Problem is being entered for a Customer, a Recent Customer Requests list is displayed during the Problem creation process for all Items the Customer owns either directly or via shared ownership. The Requests list includes a scroll-over summary where Subject content is displayed, if the Subject is completed for a Problem. Subject information can also be included within a column in the Problems List View, for a quick glance summary of a Problem.



Analysis

The Analysis tab is used to search for Solutions, Workarounds or to escalate the current Problem to a Change Request. The drop-down options include:

Analysis Tab Options

Proposed Solution	Displays a list of all Solutions with a search based on the Problem Description, Item Type and Classification. To assign a Solution, select the Solution ID number to display the Solution in full. Click Resolve if the Solution is relevant. This will close the Problem and notify the Customer.
Search Solution	Allows User to enter full text or ID number to search for possible Solution Articles. To assign a Solution, select the Solution ID number to display the Solution in full. Click Resolve if the Solution is relevant. This will close the Problem and notify the Customer.
New Solution	Displays Knowledge Base editor to allow User to enter a new Solution. Define visibility, enter a Summary, a Description and Save.
Proposed Workarounds	Displays a list of all Workarounds with a search based on Problem Description, Item Type and Classification. To assign a Workaround, select the Article number to display the Workaround in full. Click Resolve if the Workaround is relevant. This will assign the Workaround to the Problem. After a Workaround has been assigned, the View Workaround option will become visible within the Analysis options
Search Workarounds	Allows User to enter full text or ID number to search for possible Workaround Articles. To assign a Workaround, select the Article number to display the Workaround in full. Click Resolve if the Workaround is relevant. This will assign the Workaround to the Problem. After a Workaround has been assigned, the View Workaround option will become visible within the Analysis options
New Workaround	Displays Knowledge Base editor to allow User to enter a new Workaround. Define visibility, enter a Summary, a Description and Save.
New Change Request	Allows the User to create a new 'Change Request' and links the RFC and Problem into the new Group. The Problem status moves to 'On Hold - Process Escalated'.
Alerts	Allows the User to create an Alert directly related to the Problem. Displays any reminder alerts that have been created in the Summary tab of the Problem. Select the Alerts option to view Alerts list, and click on an Alert Publish Date to view Alert Content.

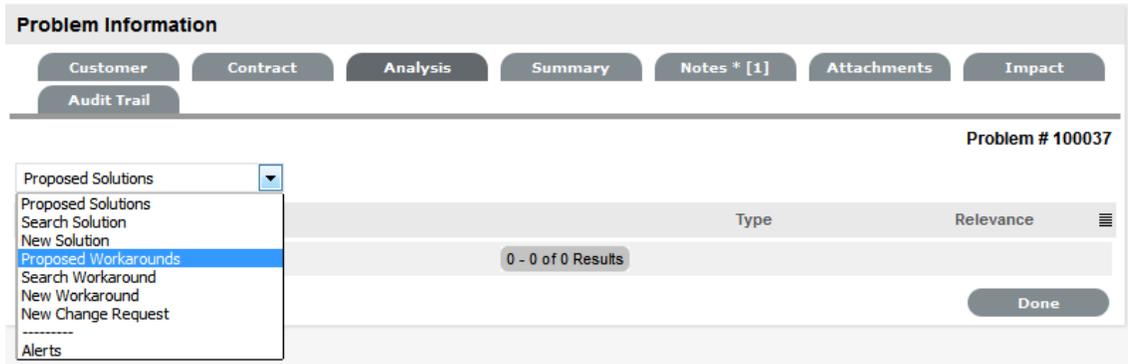
Problem Workarounds

Workarounds are temporary fixes applied to a Problem until the Problem is resolved.

To assign a Workaround to a Problem, the User can apply a Proposed Workaround presented by the application or use the Search Workaround facility. If a Workaround Article does not exist, a Workaround can be created within this screen. Once a Workaround is applied to the Problem it can be accessed via the Analysis tab under the View Workaround option. *Searching for a Workaround*

To search for a Workaround:

1. Click on the number of the required Problem
The Problem Information screen appears.
2. Select the Analysis tab
3. Click Edit
The drop-down list will become active.



4. Select an option:

Analysis Tab Options

Proposed Workarounds	Displays a list of all Workarounds with a search based on Problem Description, Item Type and Classification. To assign a Workaround, select the Article number to display the Workaround in full. Click Resolve if the Workaround is relevant. This will assign the Workaround to the Problem. After a Workaround has been assigned, the View Workaround option will become visible within the Analysis options
Search Workarounds	Allows User to enter full text or ID number to search for possible Workaround Articles. To assign a Workaround, select the Article number to display the Workaround in full. Click Resolve if the Workaround is relevant. This will assign the Workaround to the Problem. After a Workaround has been assigned, the View Workaround option will become visible within the Analysis options
New Workaround	Displays Knowledge Base editor to allow User to enter a new Workaround. Define visibility, enter a Summary, a Description and Save.

5. Click Save.

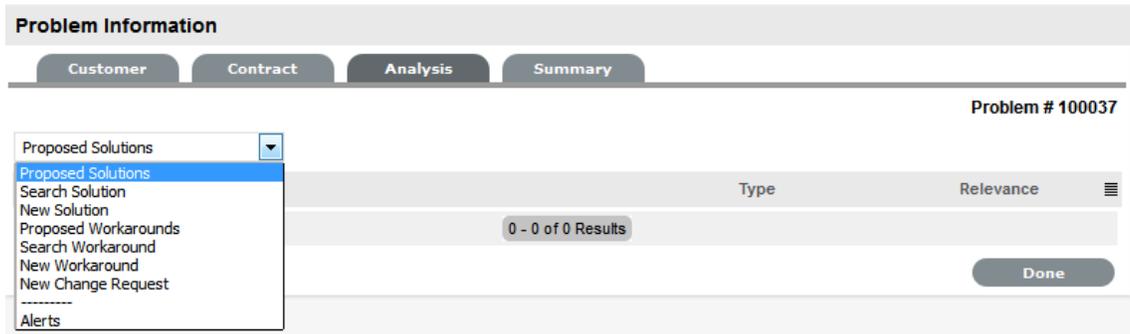
Problem Solutions

To assign a Solution or Known Error to a Problem, the User can apply Proposed Solutions presented by the application or use the Search Solution facility to access the Known Error database. If a Known Error does not exist, it can be created within this screen. Once a Known Error is applied to the Problem, the application automatically closes the Problem.

Searching for a Solution/Known Error

To Search for a Solution/Known Error:

1. Click on the number of the required Problem
The Problem Information screen appears.
2. Select the Analysis tab
3. Click Edit
The drop-down list will become active.



4. Select from the available options, as follows:

Analysis Tab Options

Proposed Solution	Displays a list of all Solutions using a search based on the Problem Description, Item Type and Classification. To assign a Solution, select the Solution ID number to display the Solution in full. Click Resolve if the Solution is relevant. This will close the Problem and notify the Customer.
Search Solution	Allows User to enter full text or ID number to search for possible Solution Articles. To assign a Solution, select the Solution ID number to display the solution in full. Click Resolve if the Solution is relevant. This will close the Problem and notify the Customer.
New Solution	Displays Knowledge Base editor to allow User to enter a new Solution. Define visibility, enter a Summary, a Description and Save.

5. Click Save.

Creating a Change Request from a Problem

Change Requests can be generated within the Analysis tab of a Problem screen. This will move the current Problem status to On Hold and link the new Change Request to the selected Change group.

To create a related RFC for a Problem, within the Analysis tab:

1. Select Edit
The Proposed Solution drop-down list opens in Edit Mode

Problem Information

Customer Contract **Analysis** Summary

Problem # 100037

Proposed Solutions

- Proposed Solutions
- Search Solution
- New Solution
- Proposed Workarounds
- Search Workaround
- New Workaround
- New Change Request**
- Alerts

Type	Relevance
0 - 0 of 0 Results	

Done

2. Select the New Change Request option

The RFC is automatically created and the Problem status changed to On Hold - Process Escalated.



Information

New change request has been created and linked to the Group Change #1000080

Creating an Alert

Within the Analysis tab, an Alert that is associated with the Problem can be created by:

1. Select Edit within the Analysis tab
2. Select the Alerts option in the drop-down list
The New button is made accessible.
3. Click New
4. Refine the content for each required field:

Alert Details	Description
Created	The current date and time.
Publish	The date the Alert is published. Use the calendar icon to the right of the field, to select a Publish date. Set to a date in the future, or use the default to publish the Alert immediately.
Dismiss	The date the Alert ceases to be available. Use the calendar icon to the right of the field, to select a Publish date. On this date, the Alert will disappear from a User's Alert list.
Severity	The type of Alert to be published. The choices are: <ul style="list-style-type: none"> ◆ Information – for general Alerts ◆ Warning – to warn Users of potential issues ◆ Urgent – to publish an urgent actionable message. <p>The icon appearing with the message will depend on the type of Alert.</p>
User	The User type to receive the Alert, which include: <ul style="list-style-type: none"> ◆ Specific Customer or User - In the Find User or Customer list, click search to select the recipient from the drop-down list. ◆ User Role - An Alert sent to a User Role will go to all Users with that Role. ◆ Personal Alert - A personal Alert appears on the User's own screen at the Publish date. ◆ Organizational Units - In the Find Org. Unit field, search and select the recipients.
Title	Enter the title of the Alert.
Message	Enter the main content of the Alert.

5. Click Save.

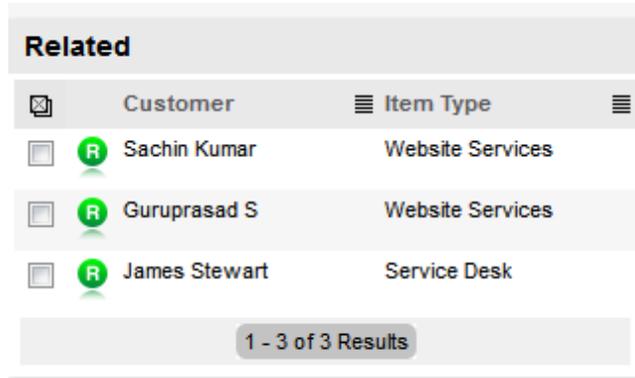
Related Requests

The Related sidebar is automatically displayed when a Problem is linked to other requests.

Problems can be linked to other requests in the following ways:

- ◆ Using the Group option within the My Tasks list, using a Problem assigned to the Group
- ◆ Using the Problem Group feature under the Problem > Errors tab

- ♦ Linking requests within the Problem's Analysis tab.



Any requests that belong to a Group can be viewed within the Related Requests sidebar window, inside the Problem Information screen. Within this window, all related requests are listed and can be controlled as one. For example, Notes can be applied to all related requests, or the entire Group can be closed.

Managing Related Requests

The details of a related request can be viewed by hovering the mouse over the colored icon. Click on the same icon, and the system moves to the Problem Information screen of that related request.



Bulk Updates

The Bulk option allows one or more related requests to have the following information updated simultaneously:

- ♦ Priority, Workflow, Status, Team, Escalation Layer & Technician
- ♦ Notification method and recipients
- ♦ Request Classification
- ♦ Items
- ♦ Description, Attachments and Notes.

To bulk update for any of the above elements:

1. Select Operations>Problems
2. Click on the Request # link of the relevant grouped request
3. Tick the checkboxes of the requests in the Related sidebar that are to be updated

4. Select



The system displays the Bulk Editor screen.

The system does not allow requests with a status of Pending-No Contract to be updated

If the Bulk update is only associated with requests of this Status, an error message is displayed.

5. Amend the appropriate element as per the above list
6. Click Save.

Remove Related Requests

To remove a request from a Group:

1. Go to Operations>Problems
2. Click on the Request # hyperlink of a Grouped Request
3. Click



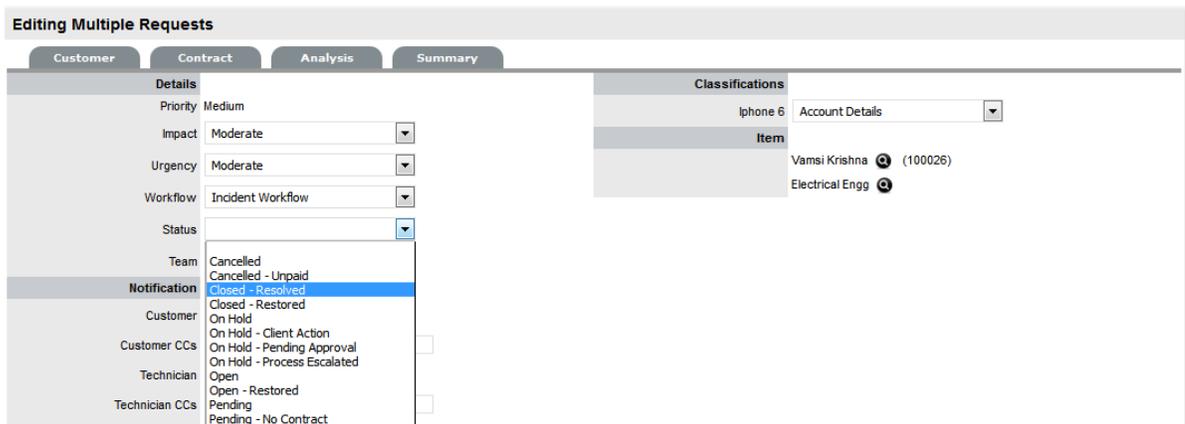
The Problem opens in Edit mode and checkboxes become available next to the requests in the Related sidebar.

4. Tick the checkboxes of the requests to be removed
5. Select 

The marked requests are removed from the Group.

Closing Requests within Groups

Requests within the Related sidebar can be closed individually by moving the Workflow State to a Closed State within the Problem Information Screen. Grouped requests can also be closed as a group, by changing the request Status to a Closed State as part of a bulk update. (See Bulk Updates above.)



Status

Problem Workflows are a combination of any number of stages or States that cover the lifecycle of an issue to be investigated. A Supervisor creates new Problem States for the default Problem Workflow or builds new Workflows in the Service >Workflows tab. For more information about configuring Workflows.

Within the Problem Information Summary page, the assigned stage of the Workflow is displayed within the Status field, with the Next Action field displaying the options of where the Problem can move to. To view an assigned Workflow in its entirety select .

The system provides the following States:

Status	Description
SLA Timers On	
Open	The Problem is open. SLA timers are running and the automated SLA reminders, warnings and escalations will fire relative to the Triggers configured for the SLA.
Open Restored	The Problem is still open and the issue has yet to be resolved, but a satisfactory temporary solution has been put in place. SLA triggers will fire for the SLAs Resolution Time, but the Restoration targets have been met for the Problem.
Pending	Work on the Problem has not yet begun. The Response-time SLA trigger will fire for Problems with this status.
SLA Timers Off	
On Hold	The Problem has been put on hold for some reason. SLA triggers will not fire for Problems with this Status.
On Hold - Client Action	Can be thought of as an awaiting Customer confirmation state that will allow a Problem to remain open but prevent SLA triggers from firing. (This was called Open Resolved in previous releases).
On Hold - Process Escalated*	The Problem has been transferred to some external process. SLA reminders, warnings and escalations will not fire for the assigned SLA.
Pending - No Contract*	A valid contract is not in place and one needs to be created or processed before work can commence on the Problem.
Closed Restored	Though the basic issue remains, a satisfactory temporary solution has been reached and the Problem has been closed. SLA triggers will not fire for Problems with this Status.
Closed Resolved	The issue has been resolved and the Problem has been closed. SLA triggers will not fire for Problems with this Status.
Cancelled	The Problem has been cancelled. SLA triggers will not fire for Problems with this Status.

*Denote System States that cannot be deleted.

NOTE: When a Problem is created, it is automatically assigned the Default Open Status, as configured within the assigned Workflow.

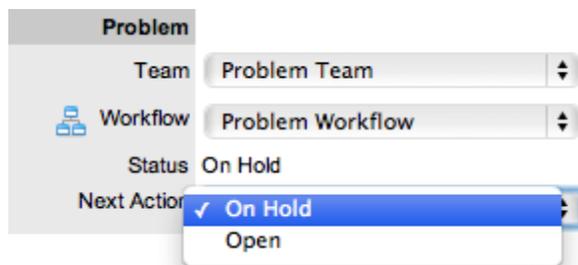
Any changes to the Status Type will be recorded in the Audit Trail tab.

Updating a Problem's Status

To manually change a Problem's Status:

1. Select Operations> Problem
2. Select a Request # hyperlink for the relevant Problem
3. Click Edit
4. From the Next Action drop-down list select the Problem's next Status

The States listed in Next Action are based on the Problem Workflow and its lifecycle. To view the complete Workflow lifecycle click .



5. Click Save.

The system can automatically move a Problem into another State through the following actions:

- ♦ Closing a Problem by adding a Note
- ♦ Escalating a Problem to a RFC
- ♦ When Billing is enabled and payment is not received.

Requests with a Pending-No Contract Status

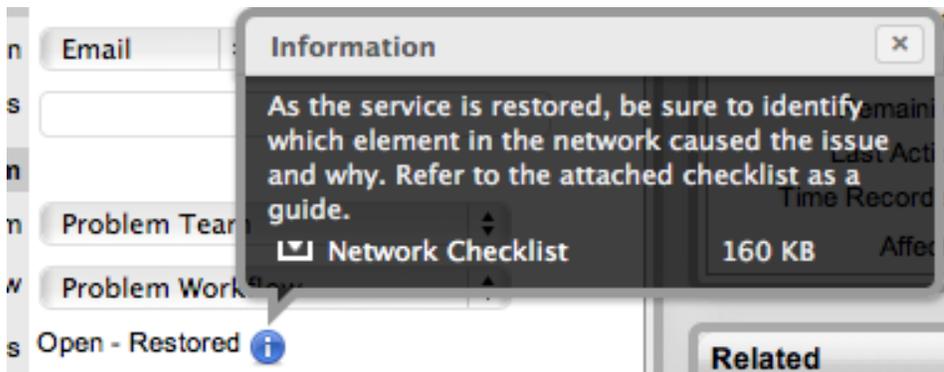
Requests logged with the system that do not have a valid Contract are assigned the Pending - No Contract status. These requests are locked until a valid Contract is applied, and if relevant, paid.

Viewing a Status Note

When Problems move into a State with a Status Note,  is displayed beside the Status within the Summary tab of the Problem. Scroll over  to view the contents of the Status Note. If the Status Note includes an attachment, click the attachment name link in the pop-up window to download it. Click



to close the window.



SLA Triggers and Problem Status

SLA Triggers fire for Problems that are in a Workflow State that have the Service Timer Active option set to Yes. The default Timer Active set for systems States can be changed if relevant for the organization. For example, it may not be appropriate for an organization to have SLA Triggers fire when a Problem is moved to the system default On Hold - Pending Approval State.

The following icons displayed in the Service Terms box, visually indicate how the Problem is tracking against the SLA and if the SLA timers are active:

Current SLA Status	
	Workflow is in an SLA paused State. Triggers will not fire.
	Workflow is in an SLA timers on State. Triggers will fire.
	Workflow is in an Exit State and the SLA has been successfully met.
	Assigned SLA has been breached and Workflow is in an Exit State.

Supervisor Users can verify the Timer Active status of a Workflow by scrolling over the Status in the Workflow map available in the Summary Information screen, or within the Service>Workflows>selected Workflow> Lifecycle>selected Status screen.

Service	
SLA Active	<input checked="" type="radio"/> Yes <input type="radio"/> No
SLA Restoration	<input type="radio"/> Yes <input checked="" type="radio"/> No
SLA Resolution	<input type="radio"/> Yes <input checked="" type="radio"/> No

Priority

The Priority determines the timeframe in which a Problem should be handled and sets the service level targets adopted by the Problem that drive the SLA triggers and actions. It represents the degree of importance of the Problem to the Customer and also indicates the urgency of the Problem to the Technician.

A Problem can have one of four possible priorities:

- ♦ Low

- ♦ Medium
- ♦ High
- ♦ Urgent.

Setting Problem Priority

The Administrator configures the options for determining the Priority within the Setup>Privileges>Request tab. The Priority options include:

- ♦ Selected Priority - where the system configured default Priority is applied to the Problem but can be manually adjusted by the User
- ♦ Derived Priority - where the Impact is derived from the Item Criticality and the User enters the Urgency, enabling the system to calculate the Priority.

Urgency: The value selected reflects how quickly a resolution is required

Impact: The value selected indicates the impact the Problem has on the User and Organization. The higher the Impact the higher the Priority to resolve the Problem.

If the Administrator has set the Request Priority option to Derived, the Priority of a Problem results from the Impact being mapped from the Criticality of the Item and then combined with the selected Urgency. However, if required, the Impact can be manually adjusted within the Problem Information screen to affect the Priority.

The following table displays the calculations applied by the system using the Item Criticality mapped directly to the Problem Impact, to determine a Request's Priority:

Impact / Urgency	Urgent	High	Moderate	Low	Very Low
Critical	1.000	0.850	0.700	0.550	0.410
High	0.850	0.723	0.595	0.468	0.349
Moderate	0.700	0.595	0.490	0.385	0.287
Low	0.550	0.468	0.385	0.303	0.226
Very Low	0.410	0.349	0.287	0.226	0.168

The above calculations result in the following Priorities:

Priority	Upper	Lower
Urgent	1	0.83
High	0.83	0.58
Medium	0.58	0.34
Low	0.34	0

Summary Tab

- ♦ [“Summary” on page 381](#)
- ♦ [“Changing a Problem's Customer or Item” on page 385](#)
- ♦ [“Item Relationship Map and Assignment” on page 386](#)
- ♦ [“Updating the Item associated with the Request” on page 387](#)

Summary

The Summary tab provides comprehensive details related to a Problem and gives access to the tabs required to work on the Problem.

IMPORTANT: In the Summary page, you can view or update the available details:

- ◆ To view details of a Customer, select the Customer name link within the Problem Information screen.
- ◆ To update details of the **Customer** and the **Item** assigned to the Problem, click  within the Summary tab when the Problem is in Edit mode.

The Problem Information Summary tab includes the following:

Summary Tab	Description
-------------	-------------

Details

The following details are displayed:

- ◆ **Customer:** The customer assigned to the Problem. Click on the customer name link to view customer information. Scroll over the information icon  next to the **Customer** for quick information such as **Username**, **Org.Unit**, **Phone** and **Local Time**.
- ◆ **Item:** An item assigned to the Problem. Select the **Item Number** link for more information about the Item. Scroll over the information icon  next to the **Item Number** to view Item information recorded on the **Details** tab.

Click  to view the Item Relationship map. Any Item displayed in the map can be set as the Item associated with the Problem, by making it the central node of the Relationship map and clicking on the centralized map icon to confirm the Item assignment change.

To update the Item assigned to the Problem, click on the Customer tab and ensure the Problem is in edit mode, or use the Update Item facility in the Relationships filter view of the impact tab.

- ◆ **Type:**
- ◆ **Classification:** Displays the Problem Classification that was selected when the Problem was created. This can be updated, if required.
- ◆ **Urgency:** Indicates if the Problem is to be taken up on priority.
- ◆ **Impact:** Displays the progress of the Problem in relation to agreed Service Level targets and Workflow time estimates. Impact could be critical, high, moderate, low or very low.
- ◆ **Priority:** Shows the priority of the Problem, which determines the Service Level triggers applied to the Problem.

If the Derived option is enabled in the applications Setup, then the Urgency and Impact drop-down lists are displayed. The User is required to select the corresponding Urgency and Impact for the Problem to alter the Priority assigned.

Summary Tab	Description
<i>Assignments</i>	<p>The following details are displayed:</p> <ul style="list-style-type: none"> ◆ Escalation: This is visible if the Escalation Control option is enabled in the application Setup. This option is only available to the Supervisor and allows them to disable the escalation timers. ◆ Escalation Layer: Shows the number of levels of Escalation that exist in the Team assigned to the Incident, and at which level the Incident is currently assigned. ◆ Technician: The name of the Technician assigned to the Problem. When a Problem is assigned to the Queue, the name applied in the Technician field is System User. ◆ Subject: It is recommended that a summary be included in the Subject field, as the details recorded in the Subject field are displayed in scroll-over summaries throughout the application. For example, when a new Problem is being entered for a Customer, a Recent Customer Requests list is displayed during the Problem creation process for all Items the Customer owns either directly or via shared ownership. The Requests list includes a scroll-over summary where Subject content is displayed, if the Subject is completed for a Problem. Subject information can also be included within a column in the Problems List View, for a quick glance summary of a Problem. ◆ Description: The Problem report entered during Problem creation is recorded within the Description field. Amendments can be made to the Problem report within this field if required, but it should be noted that an Audit Trail is not maintained for alterations made in this field. Therefore, it is recommended that any Problem report changes be entered as a Note.
<i>Notification</i>	<p>The following details are displayed:</p> <ul style="list-style-type: none"> ◆ Customer: ◆ Customer CCs: ◆ Technician: Allows the User to adjust the default Technician notification between None, Email or SMS for updating the assigned Technician, all Technicians in the Team or Layer of Escalation assigned to the Problem. ◆ Technician CCs: <i>Technician CCs</i> is a free text field for any additional notification recipients, these can be divided into Customer and Technician CC lists. ◆ Alternate Team: Is visible if the Notify Alternate Team option is enabled in the Admin>Email>Setup tab and another Team within the same Process is included in the system. This allows the User to define another Team to be notified about updates regarding the Problem.

Summary Tab	Description
-------------	-------------

Problem	The following details are displayed:
---------	--------------------------------------

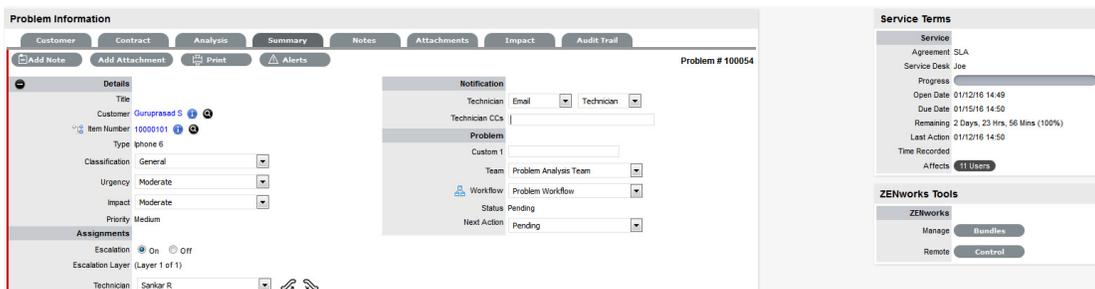
- ◆ **Team:** Displays the default support Team assigned to the Problem. This can be changed by selecting another option within the drop-down list. The Team list is derived from the Workflow and Workflow State.
- ◆ **Workflow:** Displays the default Workflow assigned to the Problem. This can be changed by selecting another option within the drop-down list. The Workflow list is derived from the SLA assigned to the Problem.

Select  to view the Workflow in its entirety.

- ◆ **Status:** Shows the current Workflow State of the Problem.
- ◆ **Next Action:** Lists all the States available after the current Problem State. This is based on the Workflow assigned to the Problem. To move the Problem through the Workflow, select a Status included in the list displayed.
- ◆ **Status Due:** Details the expiry time for the current Workflow State if the State has an OLA assigned.

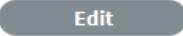
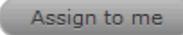
Service Terms	The following details are displayed:
---------------	--------------------------------------

- ◆ **Agreement :** Displays the Service Level Agreement assigned to the Problem. The service level is derived from either the Customer, Organizational Unit or Item.
- ◆ **Service Manager:** Displays the name of the Service Level Manager responsible for overseeing Requests related to the assigned service agreement.
- ◆ **Progress:** Visually displays how the Problem is tracking against the assigned SLA and displays the percentage of SLA used when greater than 10%. The grey progress bar is gradually filled in based on the status:
 - ◆  - Workflow is in an SLA paused state. Triggers will not fire.
 - ◆  - Workflow is in an SLA timers on state. Triggers will fire.
 - ◆  - Workflow is in an Exit state and the SLA has been successfully maintained.
 - ◆  - Assigned SLA has been breached and Workflow is in an Exit state.
- ◆ **Dates:** Summarizes the important date details for the Problem. The due date is automatically calculated based on the Service Level and Priority assigned to the Problem.
- ◆ **Time Recorded:** Displays the amount of time the Problem has been open and worked on.
- ◆ **Affects:** Displays the number of Users assigned to the Item.



NOTE: Only Technicians assigned to the Team can edit the Problem.

Summary Tab Buttons

	Edit opens the Problem in edit mode. This allows the Problem details to be amended, Notes to be added and time is automatically recorded against the Problem whilst in edit mode.
	Changes the default assignee of a problem to a different technician. This right is available only for technicians belonging to the same layer or team.
	Opens the Problem in edit mode and moves directly to the New Note editor.
	Duplicate creates a copy of the Problem and links the copy to the original Problem. The User can then amend the Customer or Item details, if required.
	Print opens a summary of the Problem in a Print View window. This includes a Description and all Notes added to the Problem. It is a good alternative for viewing Problem information within one window when adding a new Note.
	Allows the User to create or view reminders related to the Problem. When published it will be displayed like the normal alert icon.
	The escalation buttons allow the User to escalate the Problem to the next layer within the Team, or de-escalate the Request to the lower level, if required.

Changing a Problem's Customer or Item

After a Problem is created, it may be necessary to change the assigned Customer or Item. This may be the case when the Unknown Item is associated with a Problem, or a Service Item has been assigned to the Problem and the relevant hardware, software or network Item needs to be associated with the request. When the "Allow Unknown" option is disabled in the Setup>Privileges>Requests tab and a Request that is assigned to the Unknown Item is opened in Edit mode, the User will be prompted to update the Item assigned to the Problem before the Save button action can successfully record changes to the Problem.

NOTE: This option is also required when a Problem is generated for a request created via email, which results in the Item assigned being the system's default Unknown Item or the Org Unit's default Item.

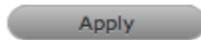
To change the Item:

1. Click the Problem's Edit button
2. Select the Problem's Item tab
3. Click the Item Number 
The Find Item option appears.
4. Search and select a new Item
5. Click Apply to update the Problem
6. Select the Summary tab to continue working on the Problem.
Or, click Cancel and Done to close the Problem with the newly assigned Item.

To change the Customer:

1. Click the Problem's Edit button

2. Select the Problem's Customer tab
3. Click  next to the Customer Name
4. Search and select a Customer
5. Click



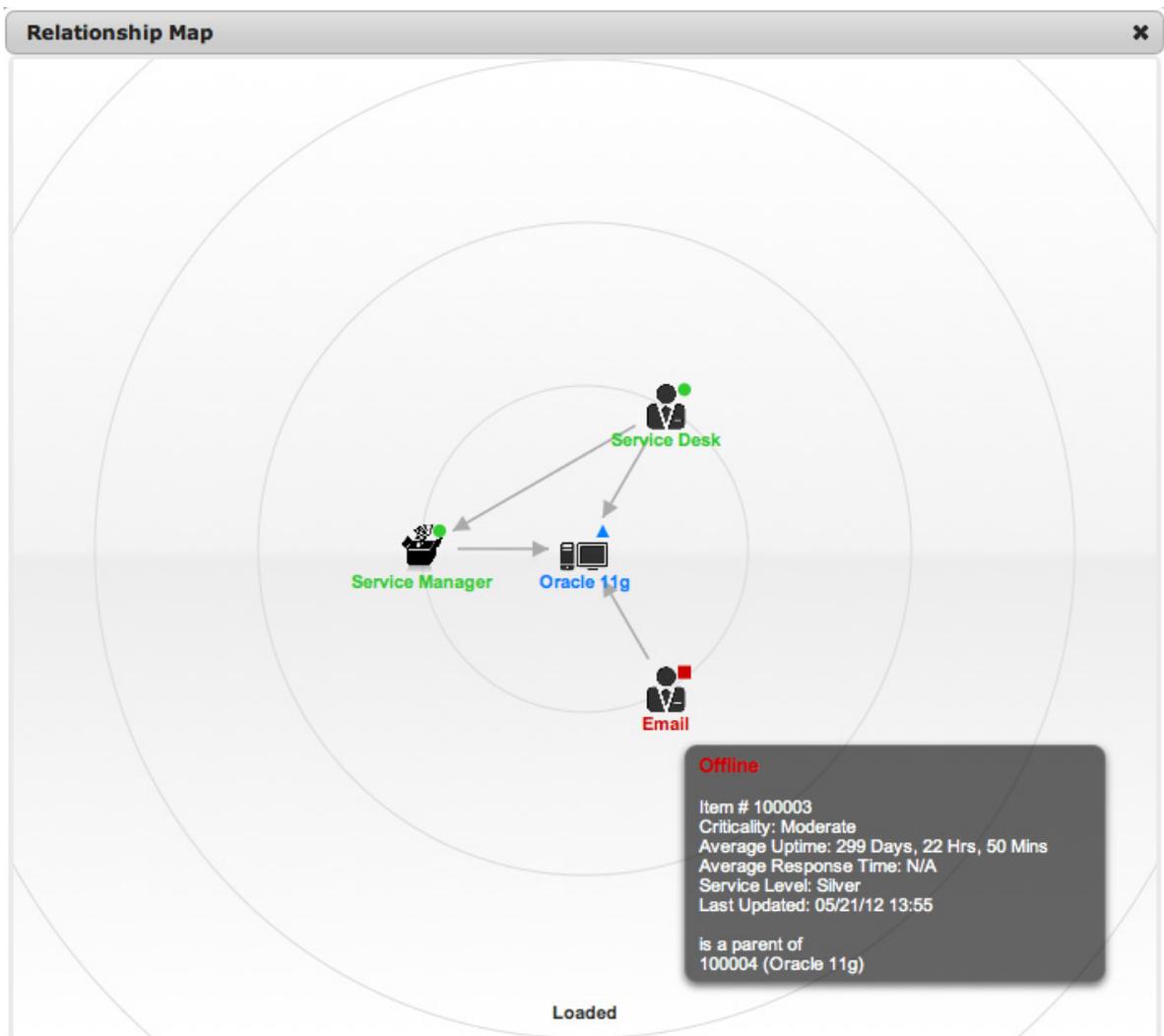
If the Problem's Item needs to be altered as a result of the Customer change the Find Item field appears. Search and select the appropriate Item using the Find Item search.

6. Select the Summary tab, to continue working on the Problem
7. Click Save.

NOTE: Technicians do not have the ability to delete Problems or Customers.

Item Relationship Map and Assignment

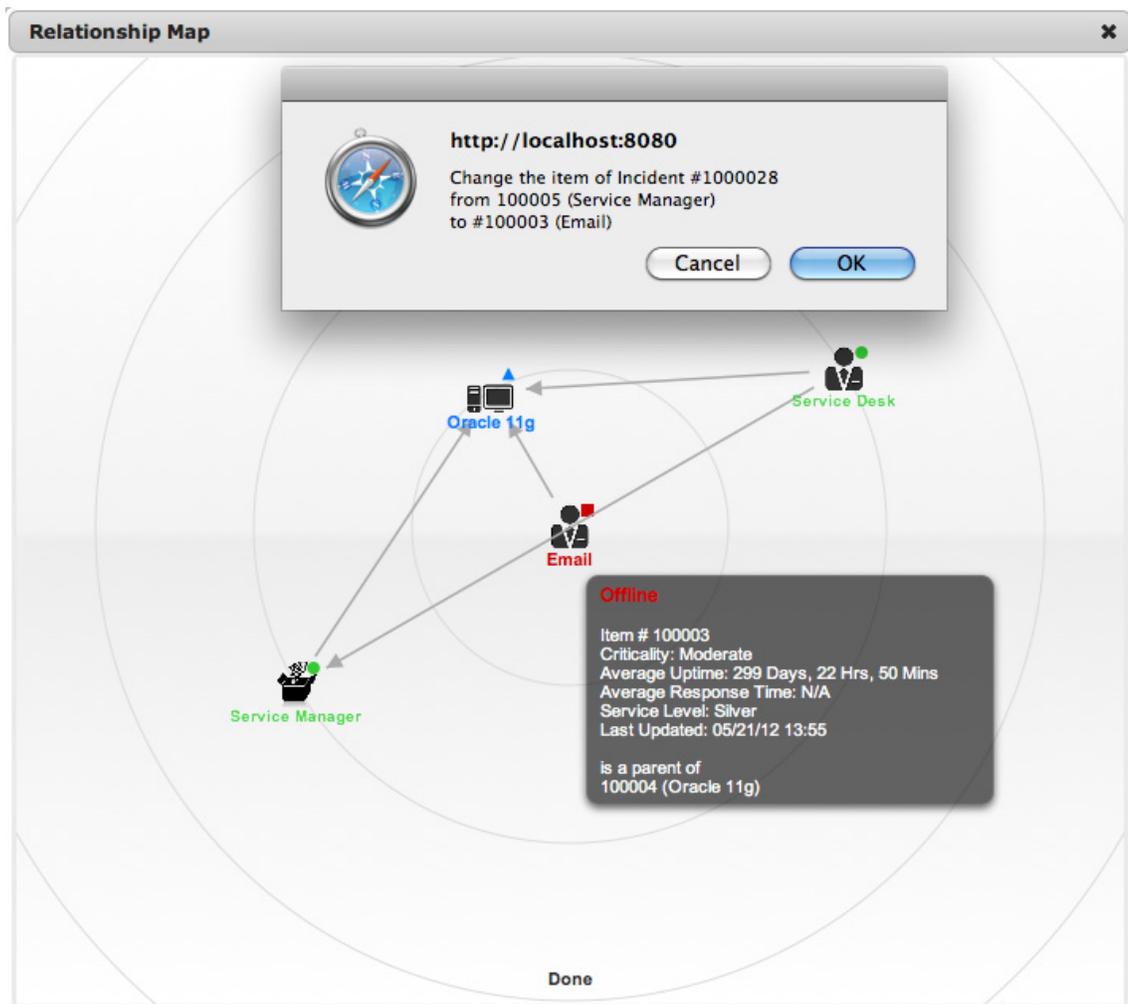
Selecting  opens a pop-up window that displays a map of Items that are related to the Request Item that can be navigated by clicking on the icons within the map. To view related Item information, scroll over the relevant Item icon.



Updating the Item associated with the Request

The Item associated with the request can be updated when in the request is in Edit mode:

1. Select 
2. Navigate the map to move the relevant Item icon to the central point of the map
Select the Item icon label in the Map to move it to the central node.
3. Click the icon label when it is in the middle of the map
A warning message is displayed, prompting the confirmation of the Item change.



4. Select OK and the Item association will be updated
(If the Enable Item Shadow option is enabled by the Administrator in the Setup>Privileges>Customer tab, the change of Item information will not be visible on the Customer Portal.)
5. Select  to close the window.
The Item assignment change is recorded in the Audit tab.

See: [Item Relationships](#).

Notes Tab

- ◆ “Notes” on page 389
- ◆ “Adding a Note” on page 389
- ◆ “Draft Note” on page 390
- ◆ “Add Note” on page 390
- ◆ “Viewing All Notes” on page 390
- ◆ “Solution/Known Error” on page 390

- ♦ “Viewing a Note” on page 391
- ♦ “Adding Notes to Grouped Problems” on page 391

Notes

The Problem Notes tab displays entries made by a User regarding a Problem. New Notes are date-stamped automatically and associated with the User logging the Note. Problem Management is considered an internal support process, therefore Notes are not made visible or sent to Customers.

The number of Notes recorded against a Problem is displayed in brackets on the Notes tab, and if a Note has been added by a Technician other than the Technician assigned to the Problem, an asterisk is visible on the Notes tab until the assigned Technician opens the Note.

Adding a Note

When the first Note is created for a Problem, the Problem Description automatically populates the New Note editor allowing the Technician to enter their response.

To add a Note:

1. Click the Problem ID Number
The Problem Information>Summary tab appears.
2. Click Edit
3. In the Notes tab, click New
4. Enter the Note details
Or, select a Template if a relevant pre-configured response has been set for the Item Type or Category for the Item assigned to the Problem.

5. Enter Note Time

The time entered represents the amount of time accumulated to formulate the Note's content or time spent working on a request away from the system. If no additional time has been spent on the Problem away from the application this field will be automatically populated with the Logged

Time when the Problem is in Edit mode, if the Manual Request Time option is disabled in the Setup>Privileges>User tab. When this option is disabled,  is visible next to the Problem number in the top right corner of the Summary Tab screen when the Request is in Edit mode.

6. Adjust the time and date of work completed, if required
7. Add attachments to be sent with the Note, if required
A maximum of two attachments can be added per Note.
8. Adjust Email Recipients and Group Options, if required
Vendors, as Email Recipients, is displayed as an option if the Problem is in a State associated with an Underpinning Contract.
9. Click .
The Note editor screen will close.

Draft Note



Use the Draft button to save an incomplete Note entry, which will be displayed in the Notes list. When a Note is saved as a draft, the Status will be displayed as . If the Add Note button is selected when a draft Note has been recorded against a request, a warning will be displayed. To continue working on a draft Note, open the request in Edit mode and select the Note No. hyperlink.

Description		Notes* [1]		Attachments		Impact		Audit Trail	
No.	Date	Note	By	Status	Minutes	New			
40	05/22/11 17:24	Dear associated technicians, please review all Item details before updating this Problem with any...	Simone Supervisor		0				

1 - 1 of 1 Results

Add Note



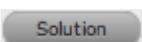
The Add Note button can be used to open the Problem in Edit mode and automatically access a new Note window, as shown in Step 4 below.

Viewing All Notes



Use a Problem's Print button to access a list of all Problem Notes in one screen.

Solution/Known Error



If a Problem Note is the resolution for the issue, the Note can be saved as the Solution/Known Error. This will convert the Note into a Solution Article (found under Problem>Analysis tab), by enabling the Create Knowledge option before selecting the Solution button. Clicking the Solution button will

automatically move the Problem to the default Closed State and all related Incidents or Service Requests are automatically closed. When the handshaking facility is enabled for the system and a Solution is recorded for a Problem, the Problem is automatically moved to the default Closed State for the assigned Workflow but all related Incidents and Requests are moved to a Pending-Approval State.

If a Solution is applied to a Problem containing attachments, the attachment is included in the Solution.

To save a Note as the Solution:

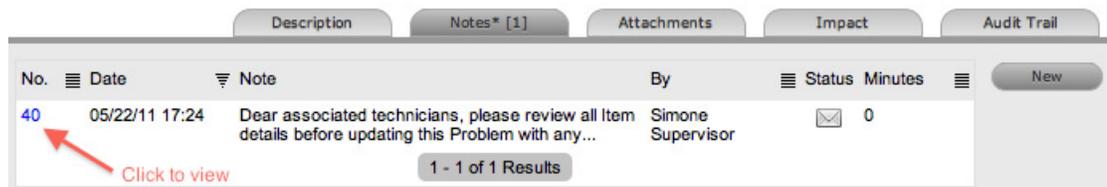
1. Enter the Note details
2. Select Create Knowledge, if the Note content is to be available in the Knowledge Base
3. Click Solution.

For Create Knowledge enabled Notes the content will be recorded as the solution under the Analysis tab. The Status of the Problem will change to default Closed State for the assigned Workflow.

Viewing a Note

To view a Note:

1. Select a Problem ID Number
2. Select the Notes tab
3. Click on the Problem Note Number hyperlink.



When Notes are viewed without opening the Request in Edit mode by clicking the Note No. link, the User can scroll through the Notes list by selecting ◀ ▶ inside the top right corner of the Notes window.

Adding Notes to Grouped Problems

When a Note is created for a Problem that belongs to a Group, the Apply to Group option is visible within the Notes tab. If the new Note is to be assigned to all requests within the Group, select the Apply to Group box.

NOTE: Any new requests added to the Group at a later date will also have all pre-existing Notes, with this option selected, applied to the newly grouped request.

When the Apply to Group option is selected, the Add Note Time to Group option is displayed. Select this checkbox to also apply the Note Time to each of the requests.

Email Recipients Technicians CCs
 Group Options Apply to Group
 Create Knowledge Yes No

The Solution option is not visible if the Problem is included in a group of requests that includes Change Requests.

Attachments Tab

- ◆ [“Attachments” on page 392](#)
- ◆ [“Adding an Attachment” on page 392](#)
- ◆ [“Deleting an Attachment” on page 393](#)

Attachments

All Users can attach any type of file to a Problem.

Adding an Attachment

To add an Attachment:

1. Select a Problem ID
2. Click Edit
3. Select the Attachment tab
4. Click

Problem Information

Penguins.jpg Description

5. Browse and select a file
6. Enter a file Description, if necessary
7. Select to upload the file or to cancel the process.

The Attachment is automatically date stamped and shown as a file name link along with its file size.

To open an Attachment, select the File Name hyperlink.

Problem Information

File Description	Size	Date	Share
<input type="checkbox"/> Penguins.jpg	760 KB	01/12/16 15:14	
<input type="checkbox"/> Desert.jpg	826 KB	01/12/16 15:14	

1 - 2 of 2 Results

NOTE: Requests that are part of a Group and have attachments uploaded within the Group Details Screen, display  within the Share Column.

Deleting an Attachment

To delete an Attachment, select the checkbox beside the file Description then click Delete. The addition or removal of Attachments is recorded within the Audit Trail of the Problem.

Impact Tab

- ◆ [“Impact” on page 393](#)
- ◆ [“Service Targets” on page 394](#)
- ◆ [“Service Level Breaches” on page 394](#)
- ◆ [“Services Affected” on page 395](#)
- ◆ [“Estimates” on page 395](#)
- ◆ [“Contract Monitor” on page 396](#)

Impact

The Impact tab provides the capability to measure the progress of a Problem relative to agreed Service Level targets and Workflow time estimates. It also includes a quick reference for identifying other Services or Items affected by the Problem. This tab displays a summary of the following:

- ◆ Service targets
- ◆ Workflow estimates
- ◆ The impact of the current Problem on related infrastructure.

The drop-down filter options within the Impact tab include:

Options	Description
Service Targets	Displays the target response, restoration and resolution times based on the Service Level Agreement/OLA assigned to the Problem.
Service Level Breaches	Displays service level breaches that have occurred and allows Users to assign a breach code and explanation for the breach.
Services Affected	Displays the Service Item Number, the Service SLA and number of Affected Users for any Services related to the Item associated with the Problem.
Estimates	Provides a summary of the time estimated for each State of the Workflow based on the OLA assigned to the Problem.
Contract Monitor	If the current Incident Workflow State is assigned an Underpinning Contract or OLA, a table is displayed outlining the response, restoration and resolution milestones. When a milestone is met, the User is required to check the relevant checkbox. The application will automatically calculate the actual time accrued to achieve the milestone. The value displayed here is used for the Contract reports.
Purchases	When Purchase Orders are enabled in the system, any Purchase Orders associated with Items assigned to the Problem are accessible through this option.

Service Targets

The details displayed here are drawn from the Service Level assigned to the Problem. These include the target Response, Restoration and Resolution times for a Problem, based on the Priority assigned. If an Underpinning contract or OLA has been assigned to the Problem's current state then the targets for that contract will also be listed.



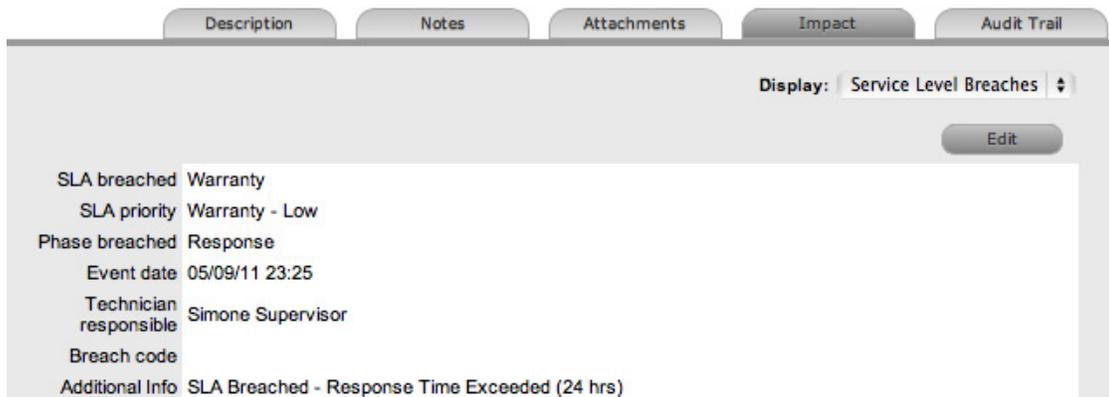
The screenshot shows the 'Problem Information' interface with tabs for Customer, Contract, Analysis, Summary, Notes, Attachments [2], Impact, and Audit Trail. The 'Display' dropdown is set to 'Service Targets'. A table lists the following data:

Name	Priority	Response Time	Restoration Time	Resolution Time	24 x 7 support
SLA	Medium	18 Hours	36 Hours	72 Hours	Yes

For more information on Service Targets, see: [Service Level Agreements](#).

Service Level Breaches

When a Problem Service Level Agreement is violated, a service level breach is recorded against the Problem. The User assigned to the request will be notified and asked to provide a reason for the breach and assign a breach code.

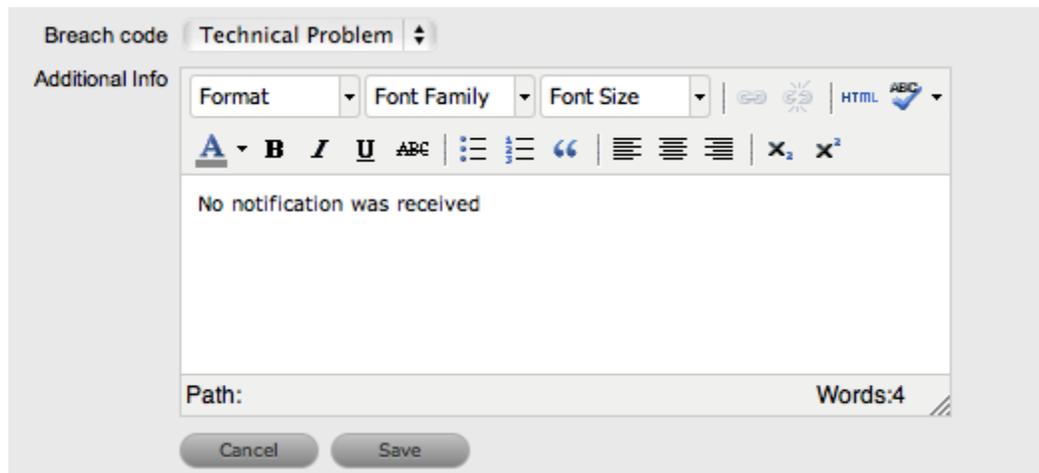


The screenshot shows the 'Service Level Breaches' interface with tabs for Description, Notes, Attachments, Impact, and Audit Trail. The 'Display' dropdown is set to 'Service Level Breaches'. An 'Edit' button is visible. The breach details are as follows:

SLA breached	Warranty
SLA priority	Warranty - Low
Phase breached	Response
Event date	05/09/11 23:25
Technician responsible	Simone Supervisor
Breach code	
Additional Info	SLA Breached - Response Time Exceeded (24 hrs)

To assign a breach code:

1. Click the Problem number
2. Click Edit
3. Select Impact > Service Level Breaches
4. Click Edit
5. Assign a Breach Code
(The available codes are created by the Supervisor within the Service tab.)
6. Add any additional information, if required



7. Click Save.

All breach information is used for reporting on Service Level Agreements.

Services Affected

When the request is logged against an Item that is associated with Services within the Item Relationships tab, the Services Affected option displays the Service Item Number, the Service SLA and number of Affected Users.

Estimates

The Estimates option allows Users to view an indication of the approximate time a Problem should remain in each State of the Problem Workflow, the amount of time logged in each State and the length of time the Problem resided in each State.

Options	Description
Estimate	Indicates the approximate length of time the Problem will spend in the Workflow State. This field is automatically completed if an OLA or UC is assigned to the Workflow State.
Logged	Is a combination of time accrued against the Problem when in edit mode with the automatic timers enabled, and the sum total of Note Times manually entered by Users.
Total	The total time a Problem has resided in the Workflow State.
% Active	The percentage of the Total Time that the Problem was actively worked on when in the State. The calculation is, (Logged time divided by Total time) x 100.

1. Select a Problem ID
2. Click Edit
3. Move to the Impact tab, select Estimates from the drop-down list
4. Select the State hyperlink within the Status column of the Estimate Time to be adjusted
An editor box is displayed.
5. Enter the adjusted time in the available field
6. Click Save within the editor box
7. Make any other time adjustments, if required
8. Select Save to record all manually entered time adjustments against the Problem.

NOTE: The Actual Time is automatically calculated by the system using the Logged Time accrued in each state for the Workflow. The time is recorded and displayed when the Problem moves to the next stage of the Workflow.

Contract Monitor

When a Workflow State with an OLA or Underpinning Contract is assigned to the Problem, the Contract Monitor displays the details of the Contract.

The screenshot shows a web interface for monitoring a contract. It is divided into two main sections: 'Details' and 'Milestones'.
Details:
 - Underpinning Contract: Canton Services
 - Start Time: 05/11/11 21:21
Milestones:
 - Expected Response Time: 05/12/11 21:21 (marked with a red vertical bar and a red arrow pointing to it from the text 'Breached Response Time').
 - Responded:
 - Expected Restoration Time: 05/13/11 21:21
 - Restored: (with a red arrow pointing to it from the text 'Check when the Service Provider meets the Restoration or ResolutionTime').
 - Expected Resolution Time: 05/15/11 21:21
 - Resolved: (with a red arrow pointing to it from the same text).
 - Comments: A large empty text area with a blue border.

The information is used for reporting purposes and includes:

Details	Description
Contract Type	Specifies if the Contract Type is an OLA or Underpinning Contract.
Start Time	Auto-generated time the Problem moved to the current Workflow State.
Milestones	
Expected Response Time	Response Time calculated using the Contract target parameters.
Responded	Actual Response Time auto-calculated when the User checks the box.
Expected Restoration Time	Restoration Time calculated using the Contract target parameters.
Restored	Actual Restoration Time auto-calculated when the User checks the box.
Expected Resolution Time	Resolution Time calculated using the Contract target parameters.
Resolved	Actual Resolution Time auto-calculated when the User checks the box.
Comments	Allows for additional comments, if required.

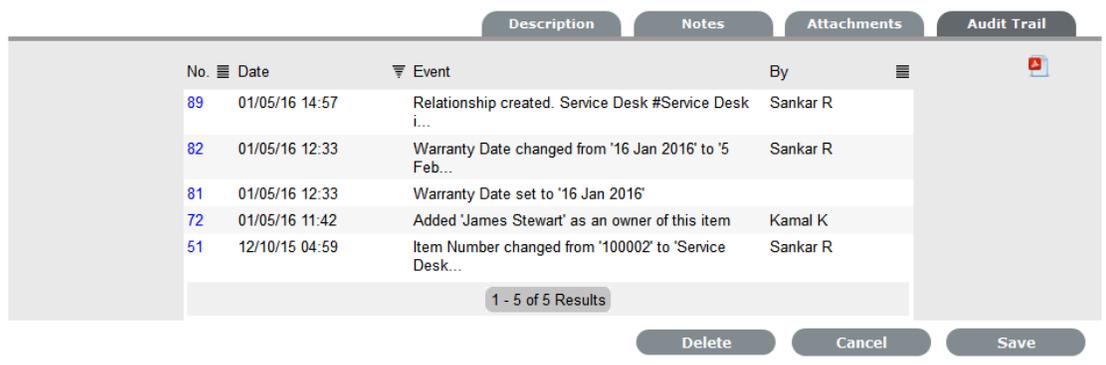
NOTE: If Milestones are breached the Response, Restoration and Resolution times are assigned a red marking.

Audit Tab

- ◆ [“Audit” on page 397](#)
- ◆ [“Audit Trail” on page 397](#)
- ◆ [“Resource Utilization” on page 397](#)
- ◆ [“Item Audit Trail” on page 397](#)
- ◆ [“Service Terms” on page 398](#)
- ◆ [“Time Recorded” on page 399](#)

Audit

The Audit tab lists all activities that occur within the lifetime of a Problem, the resources used and the history of the Problem's Item.



No.	Date	Event	By
89	01/05/16 14:57	Relationship created. Service Desk #Service Desk I...	Sankar R
82	01/05/16 12:33	Warranty Date changed from '16 Jan 2016' to '5 Feb...	Sankar R
81	01/05/16 12:33	Warranty Date set to '16 Jan 2016'	
72	01/05/16 11:42	Added 'James Stewart' as an owner of this item	Kamal K
51	12/10/15 04:59	Item Number changed from '100002' to 'Service Desk...	Sankar R

1 - 5 of 5 Results

Delete Cancel Save

Audit Trail

The Audit Trail option records all changes made to a Problem. The logged amendments, which can be exported to PDF include:

- ◆ Date and time the Problem was assigned and/or reassigned to technicians
- ◆ When the Problem was escalated to a new layer of support, or had its priority or due date changed
- ◆ Details of Notes added
- ◆ Attachments activity
- ◆ Status change
- ◆ Classification change
- ◆ Logged time.

Resource Utilization

The Resource Utilization option displays a breakdown of the time a Problem was worked on at each level of support. It details the User's name, the escalation layer they belong to, and the amount of time they have spent on the Problem.

Item Audit Trail

The history of the Item associated with the Problem is detailed within Item Audit Trail. To access more information regarding an Item Audit Trail entry, select the ID number hyperlink.

Service Terms

The Service Terms sidebar displays the Service Level Agreement (SLA) assigned to the Problem and provides details of key dates.

Service Terms

Service	
Agreement	Warranty
Progress	<div style="display: inline-block; border: 1px solid #ccc; padding: 2px;"> Paused </div>
Open Date	
Due Date	01/11/16 14:59
FSC Date	
Last Action	01/08/16 14:59
Time Recorded	
Affects	<div style="display: inline-block; border: 1px solid #ccc; border-radius: 10px; padding: 2px 5px; background-color: #333; color: white; font-weight: bold;">1 Users</div>

By default the application calculates the Due Date based on the Priority of the SLA assigned to the Customer, Organizational Unit or Item. The email reminders and escalations are then managed accordingly. If an SLA is not associated with the Problem via the Customer, Org Unit or Item, the system default SLA will be automatically assigned to the Problem but can be manually adjusted by the Technician. Once the Workflow is moved from the default Open State, the SLA can no longer be edited.

Service Terms

Agreement	<p>Displays the Service Level Agreement assigned to the Problem. The service level is derived from either the Customer, Organizational Unit or Item.</p> <p>When Contracts are not enabled, the Agreement field can be edited, when the Problem is in edit mode.</p>
Service Manager	<p>Displays the User assigned as the Service Manager for the assigned SLA.</p>
Progress	<p>Visually displays how the Problem is tracking against the assigned SLA. The grey progress bar is gradually filled in based on the status of the SLA:</p> <p>Paused - Workflow is in an SLA paused State. Triggers will not fire.</p> <p>26% - Workflow is in an SLA timers on State. Triggers will fire.</p> <p>Success - Workflow is in an Exit State and the SLA has been successfully maintained.</p> <p>Failed - Assigned SLA has been breached and Workflow is in an Exit State.</p>
Open Date	<p>The Open Date field is automatically populated when the Problem is created.</p>
Due Date	<p>By default the application calculates the Due Date based on the SLA Target for the Priority assigned to the Problem, and email reminders are sent accordingly.</p>
Fix Date	<p>Auto-filled when the Problem moves into a Workflow State that is defined as meeting the SLA Resolution Time.</p>
Remaining	<p>Auto-filled and visible when there is SLA time remaining.</p>
Time Overdue	<p>Auto-filled and visible when the SLA is overdue.</p>

Service Terms

Close Date	Auto-filled when the Status of a Problem is set to Closed. This date is fixed.
Resolution Time	Auto-filled with the number of minutes it took for the Problem to move from the first SLA active state to a Workflow State that is defined as meeting the SLA Resolution Time.
Last Action Date	Auto-filled when Done or Save is selected after the Problem has been modified or opened in edit mode. As updates may be made to a Problem after it has been Closed, this date may fall after the Close Date.
Time Recorded	Displays the sum total of automatically logged time, when the Problem is in edit mode plus any manually entered Note Times.
Affects	Number of Customers assigned to the Item associated with the Problem.

NOTE: Each User can customize the date format within the My Account sub-menu option. To change the date format go to Home > My Account, click Edit and select the preferred format.

Time Recorded

Time Recorded uses a combination of auto-timing and manual Note Time entries to measure and monitor the time spent working on a Problem.

The Auto-timer is activated when a Problem is opened in edit mode, if enabled by the Administrator in the Admin>Setup>Privileges>User>Manual Incident Time. When the Problem is saved after any amendments have been made, the timer stops and records the length of time the Problem has been worked on. This total is added to the sum total of any manual Note Time entries made by Technicians when they are adding Notes.

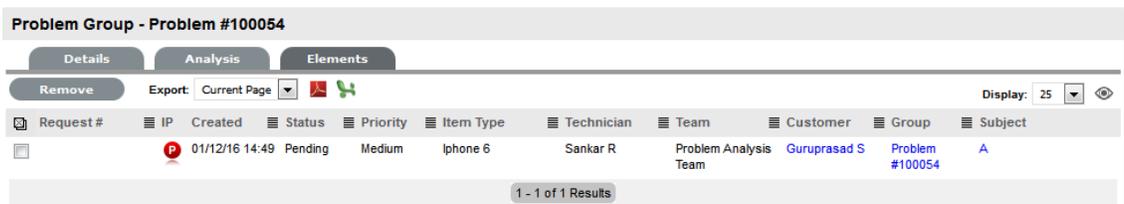
The Time Recorded is used by the system when the Contracts functionality is in use.

Elements Tab

The Elements tab displays all the requests that belong to the Problem Group. Within this screen, any request can be removed from the Group.

To remove a request:

1. Move to the Elements tab
2. Select the checkbox of the relevant request



3. Click the Remove button.

Merging Problem Groups

Existing Problem Groups can be merged within the All Known Error or All Problem Groups filter view of the Errors screen, to allow all related requests within the Groups to be managed as one. To combine Problem Groups:

1. Go to Operations>Errors
2. Check the fields next to the relevant Group #'s
3. Click Merge

The screen defaults to the Details tab for the Merge Group.

4. Set the Name, Item Type, Classification, Status, Priority and Description that best defines all associated requests
5. Click Save.

The History tab records details of the Groups merged to form the new Group. Click the No. hyperlink to view the details. The Impact tab records the Type and Number of requests associated with the Group.

Closing a Problem Group

To close the Problem Group:

1. Go to Operations>Errors
2. Select the Problem Group # link
3. Click Edit
4. Click Close
5. Click Done.

To close the related requests, within the Elements tab select a Problem and move it to a Closed State. All related Incidents and Service Requests are automatically closed, or if the handshaking facility is enabled for the system, moved to the Pending-Approval State.

Grouping Requests

Requests can be grouped by selecting the checkboxes next to the Request #, followed by the Link button.

NOTE: The type of request Group created is based on the request type assigned to the Group.

- ◆ If the Group contains Service Requests, it is a Service Request Group
- ◆ If the Group contains Incidents, it is an Incident Group
- ◆ If the Group contains Incidents/Change, it is a Change Group
- ◆ If the Group contains Incidents/Problem/Change, it is a Change Group
- ◆ If the Group contains Incidents/Problem, it is a Problem Group
- ◆ If the Group contains Problem/Change, it is a Change Group.

The system views the request hierarchy from low to high as Service Request, Incident, Problem and Change Request, and if a related request of a higher type is closed, all the lesser type requests are automatically closed, or if the handshaking facility is enabled for the system, moved to the Pending-Approval State.

2.4.4 Problem Assignment and Escalation

When a Problem is logged within the system, it is allocated to the Team that is associated with the SLAs and Workflows applied to the Problem or to the default Team assigned to a Workflow State.

The appropriate Problem Workflow is assigned within the Problem Summary tab, by selecting an option from the Workflows drop-down list. This list is derived from the SLA assigned to the Customer, Organizational Unit and Item. Once the Workflow is selected, the associated Teams are available for assignment. Based on the Team assigned, a Technician in Layer One of escalation is allocated to work on the Problem. This can be adjusted manually, if required.

The Problem is automatically escalated according to the SLA assigned to the Problem and the triggers configured within the Priority of the SLA. An Incident is escalated if the assigned User exceeds the Escalation trigger point defined for the Response, Restoration or Resolution time of the assigned SLA, when the assigned Workflow State is an SLA Active State. Or, it can be manually escalated by a User, if required.

Problem Assignment

When a Problem is assigned to a User, the system follows a series of steps to look for the most appropriate Technician for the job, based on skill set, location and workload. The order of business logic is as follows:

1. The system will identify the Team associated with the Problem's SLA and associated Workflows
2. The system will find Technicians/Supervisors assigned to the Team
3. If Users are assigned to an Organizational Unit, the system will identify the Users that belong to the same Organizational Unit as associated with the Incident by the Customer assignment
4. If Classifications/Skills are assigned to Users, the system will find Technicians/Supervisors assigned to the Problem's selected Classification
5. Based on the Team configuration, if the Live Priority option is enabled for the Team, the system will look for a User who is logged into the system
6. The system verifies Work Hours/Availability of Users within the Team for appropriate Problem assignment
7. The system will assign the Request to the User who has the lowest workload, i.e., the fewest number of Open or Pending Problems
8. If there is a tie, the system randomly allocates the Request to a User in the tie.

If a more appropriate Team member is available, the User assigned to the Problem can re-assign it manually by selecting a Technician from the drop-down Technician list in the Problem Information screen.

Note, if the Self Assign option is enabled for the Team, the system assignment logic is ignored and the User creating the request is automatically assigned the Problem.

Automated Escalation

A Problem's Service Level Agreement includes trigger points that set the rate at which automated escalations will occur for a Problem. Auto-escalation is triggered when the number of support hours specified for either a Problem's Service Level Response, Restoration or Resolution time is exceeded and the SLA Trigger action is set to Escalate. When it is escalated, the Problem is reassigned to a Technician in the next escalation level and an email is sent to the newly assigned Technician. This

process repeats itself until either the Problem Status changes to an inactive State, for example, Closed - Resolved, On Hold, Closed Change Request, or until all of the Team's available escalation layers are exhausted.

Manual Escalation

If the Problem Team has more than one escalation layer, the Technician assigned to the Problem can escalate it to the next escalation layer by clicking the escalate icon next to the Technician name . If the Problem is allocated to a second layer of escalation or higher, it can be returned to a lower escalation state by clicking the de-escalate button next to the Technician name.

A Problem's Technician and the Technician's Supervisor are able to reassign the Problem to one of the listed Technicians in the Technicians drop-down list by selecting their name and clicking Save to accept the change.



Escalation On Off
Escalation Layer Layer 2
Technician Neil Green

Escalation Control

If the Escalation Control functionality is enabled in Admin>Setup>Privileges>Requests, there is the option to enable or disable escalation within the Problem Information Summary screen.

NOTE: This option is only visible to Supervisor Users. Once a Problem has been created, a Supervisor can elect to switch the Escalation option to Off. This means all SLA timers stop, which prevents escalation. Switching the option back to On will re-start the timer and reactivate the SLA triggers.

Notification

The Notify option sets the method of messaging used by the application to notify Technicians of the following changes to a Problem:

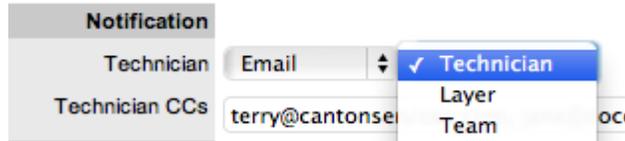
- ◆ Problem created
- ◆ Problem closed
- ◆ Problem deleted
- ◆ Problem Note added
- ◆ Problem escalated.

The default notification status of Problems is set on a per Team basis, within the Users>Teams>Team Information screen, with the default recipients of new Notes being configured by the Administrator in the Setup>Email>Setup tab. However, this can be adjusted on a per request basis within the Notification Method field and on a per Note basis, when new Notes are created.

The methods of Notification can be set for Technicians, and include:

- ◆ None, which ensures that no messages are sent
- ◆ Email, which means an email is sent containing the Problem detail updates

- ◆ SMS notifications, which sends an SMS message to Technicians about the Problem update. This is only available to Users who have a mobile number and a service provider entered in their User Information screen.



Using Problem Management as an internal service management process, notifications can be sent to the:

- ◆ Technician - notifications can be sent to all members within the Team assigned to the request, or restricted to members within the Group to which the request is assigned
- ◆ Technician CC's - enter any User account email addresses that are to be sent request Notifications
Multiple addresses should be separated by a comma.
- ◆ Alternate Team - this option is visible if the Notify Alternate Team option is enabled in the Admin>Email>Setup tab and other Teams assigned to the same Process are configured in the system. Notifications can be sent to a Team within the related Process, by the User selecting an option within the drop-down list.

Workflow

When a Problem is created it is assigned a Workflow that governs the lifecycle of the Problem. The SLA allocated to the Problem determines the Workflow options made available for the Problem. Before saving the Problem, the User can adjust the system assigned Workflow, if more than one Workflow option is available.

After the Workflow is assigned to the Problem, all stages of the assigned Workflow can be viewed by selecting . The Workflow map displays the entry points (blue boxes), transitional States (orange boxes) and exit points (red boxes). To move a Problem through the Workflow select a Status in the Next Action field, when the Problem is in Edit Mode.

The User moves the Problem through the Workflow Lifecycle by adjusting the options displayed in the Next Action field.

Moving through the Workflow

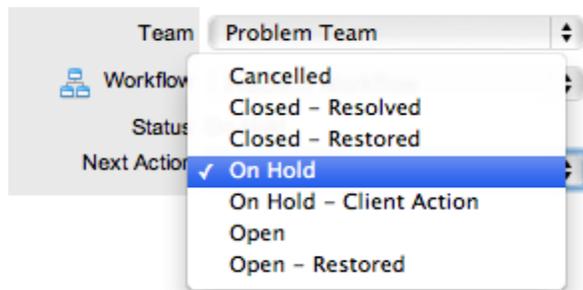
To move a Problem through the stages of the Workflow, in the Summary tab of the Problem Information screen:

1. Click Edit

The Next Action field with a drop down list of Status options is displayed below the Status field.

2. Click on the Next Action field

The Status options are displayed. This list is based on the configuration of the assigned Workflow.



3. Select a State
4. Click Save.

The selected Status is assigned to the Problem with the updated logic applied (i.e., the SLA Timers may now be active or inactive based on the newly assigned State configuration).

Assigning a State with an Underpinning Contract

Each State of a Workflow can be customized for either internal support contract management that is monitored by an OLA, or out-sourced to an external support provider, which is monitored by an Underpinning Contract.

When a Problem moves into a State that is governed by an Underpinning Contract, for internal contract control the Problem is assigned to a Service Level Manager. This allows the Manager to maintain control of the Problem and to easily follow up with the external service provider, if required. The assigned SLM will be able to adjust the current Status, add Notes and update the Contract Monitor information in the Impact tab.

Problem Information

Customer: Amber Wallan
 Org Unit: MyCompany - White
 Phone: 03 9797 999
 Local Time: Mon, 26 Mar 2012 16:36:51
 GPS: [None]

Item
 Type: Email Service
 Number: 100003
 Status: Available
 Criticality: Moderate

Details
 Classification: Question
 Urgency: Moderate
 Impact: Moderate
 Priority: Medium
 Escalation Layer: (Layer 1 of 2)
 Technician: Simone Supervisor (Service Level Manager)

Notification
 Technician: Email Technician
 Technician CCs: [None]

Problem
 Team: Problem Team
 Workflow: Problem Workflow
 Status: Open
 Next Action: Outsourced
 Underpinning Contract: Service Contractors
 Status Due: 03/29/12 16:35

Due date calculated based on the Underpinning Contract assigned to the Workflow State

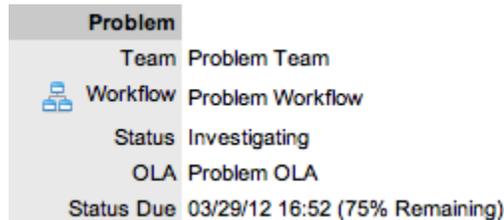
Assigned to the Service Level Manager because "Assign SLM" option set to "Yes" within the Outsourced State of the Workflow configured in the Services>Workflow tab

Alternatively, the Workflow State can be configured for the Technician assigned at the time the Problem is moved to the Underpinning Contract State to maintain Problem editing privileges and manage adherence to the assigned service agreement. If the Workflow is configured for the responsibility of the Problem to be maintained by the Technician when the Problem is in an external

contract state the Technician will be able to adjust the current Status, add Notes and, if the Technician is assigned the Internal Process of Service Level Management, amend the Contract Monitor information in the Impact tab.

OLA Status Due

Within the Summary screen, the Status Due field is visible when a Workflow Status is monitored by an OLA. The time, date and percentage remaining information displayed is calculated using the OLA's Target Resolution time.



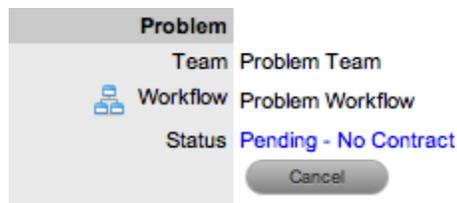
Team Assignment during the Workflow Lifecycle

To ensure that all Problems are managed throughout the Workflow, the Team assigned to the Problem when it is first logged within the system is set as the default Team. If a Problem moves to a State that has an OLA assigned with a Team, the Problem is re-assigned to that OLA's Team. When the Problem moves out of the OLA State to a State where no OLA or Team is assigned, the Problem is re-assigned to the default Team.

Pending - No Contract Status

When the Contracts or Invoices functionality is enabled and a Problem is created, the system will verify the service entitlement status of the Customer and if a valid contract is not in place, the new Problem is assigned a Status of "Pending-No Contract" and locked until a valid contract is associated with the Problem.

In a Request Group where the Customer and Organizational Unit does not have a Contract, if an Item applied to a request has a Contract and another does not, a relevant Status will be applied to each request. The User will be able to edit the request with a valid Contract, but the request without a Contract will be locked down to a Pending - No Contract Status, until a valid Contract is applied to the Problem.



The assigned Technician is automatically sent the NoContractCreateRequestSummary when the request is saved with the Status.

2.4.5 Billing/Contracts

- ◆ Contracts & Invoices

- ◆ Create a Request
- ◆ Logged Time

For details, see [Service Requests](#).

2.4.6 Known Errors

The Errors tab allows the User to view existing Problem Groups and Known Errors. Problem Groups is a management tool for investigating Problems and related Incidents that provides summary information within the Details tab and related requests in the Elements tab.

When a Problem is resolved it becomes a Known Error. Known Errors denote the successful identification of the root cause of a Problem. These can be used for future Problem resolutions, and accessed as successful Workarounds and Solutions.

Known Errors and Problem Groups that are related can also be easily merged within the relevant Filter view within the Errors tab using the Merge button.

Creating a Known Error

When a Solution is assigned to a Problem, the Problem Group is converted into a Known Error and all linked requests are consequently closed. It should be noted that if the Handshaking facility is enabled for the system, the related Incidents and Requests are moved to a Pending-Approval State, when the associated Problem is moved to the Exit State.

To assign a Solution, creating a Known Error:

1. Select Operations>Problems
2. Select a Problem ID# to assign the solution
The Problem Summary page is displayed.
3. Move to the Analysis tab
4. Click Edit
5. If a proposed solution is appropriate, select the Article number and click the Apply button
Or, assign a new Solution, by selecting the New Solution option and completing the Solution field. See Analysis Tab for more information.
6. Click Save.

The system will confirm that the Solution has been assigned and a Known Error created.



Viewing a Known Error

Errors are used to identify known Problems. An Error can be used to close a Problem, or groups of Problems.

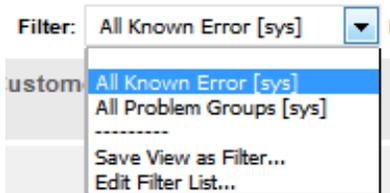
To view Known Errors:

1. Select Operations>Errors

The Groups screen appears.

Group #	Title	Item Type	Classification	Priority	Start Date	Close Date	Requests	Customers	Description
100011	Problem #100056	Iphone 6	General	Medium	01/12/16 15:13		1	Guruprasad S	A
100010	Problem #100054	Iphone 6	General	Medium	01/12/16 14:49		1	Guruprasad S	A
100005	Problem #100037	Iphone 6	General	Medium	01/11/16 10:34		1	Vamsi Krishna	How to configure a I-phone

2. Use the All Known Errors list filter



3. Select the Group # Number, or Title to open the group editor.

The Known Error details are displayed, including all assigned requests within the Elements tab and the final fix in the Solution tab.

Editing a Problem Group

While a Problem remains open, additional requests can be added to the Group within the Errors tab. To add or remove requests:

1. Select Operations>Errors
2. Select the Group # Number, or Title to open the group editor
3. Move to the Analysis tab to add requests

The Unassigned Requests are displayed by default. Tick any requests that are to be added to the group and select the Add button.
4. Move to the Elements tab, to remove requests

Tick any requests that are to be removed from the group and select the Remove button.
5. Click Done.

Analysis Tab

Requests can be linked to a Group within the Analysis screen of a Problem Group. To search for requests to add to the Group, use the system filters or the Search option.

The system filter includes the following:

Unassigned Requests	Description
Project Requests	Requests that have been assigned to the Problem Group/Project.

Unassigned Requests	Description
Unassigned Requests	All requests that exist in the system and have not been assigned to the Group.
Potential Requests - Item Type & Classification	Requests in the system that match the Item Type and/or Classification of the Group.
Potential Requests- Keyword match	Requests with keywords that match between the request Description and the Group Description. NOTE: The match is only performed on the first 250 characters of the Description.
All Problems (sys)	Lists all Problems in the system irrespective of Workflow State or User assignment. Note that this option is not visible to Technicians when the privilege to View All Requests is disabled by the Administrator.
My Problems (Active) (sys)	Displays all Problems in an active Workflow State that are assigned to the logged-in User.
My Problems (All) (sys)	Displays all Problems, in active and inactive Workflow States, that are assigned to the logged-in User.
My Teams Problems (Active) (sys)	Displays all Problems in an active Workflow State, allocated to the Teams with which the User is associated.
My Teams Problems (All) (sys)	Displays all the Problems, in active and inactive Workflow States, allocated to the Teams with which the User is associated.

To link requests:

1. Go to Operations > Problems
2. Select the Problem Group # hyperlink
3. Go to the Analysis tab
4. Choose the relevant Filter option

The screenshot shows a web interface for a 'Problem Group - Problem #100054'. It features three tabs: 'Details', 'Analysis', and 'Elements'. Below the tabs are 'Add' and 'Search' buttons. A filter dropdown is set to 'Unassigned Requests' and a 'Display: 25' option is visible. The main content is a table with the following data:

Request #	IP	Created	Status	Priority	Item Type	Technician	Team	Customer	Group	Subject
<input type="checkbox"/>	01/12/16	15:07	On Hold - Process Escalated	Medium	Website Services	Vaibhav Jain	Service Request Team	Guruprasad S		Need Access to E-Learning
<input type="checkbox"/>	01/12/16	14:27	Pending - No Contract	Medium	Unknown	Kamal K	Device-Incident Team	Jason Blackett		Wi-Fi not working
<input type="checkbox"/>	01/12/16	12:24	Pending - No Contract	Medium	Iphone 6	Sankar R	Device-Incident Team	Vamsi Krishna		A
<input type="checkbox"/>	01/11/16	10:19	Cancelled - Unpaid	Medium	Iphone 6	Joe K	BYOD-Incident-Team	Vamsi Krishna		A
<input type="checkbox"/>	01/08/16	14:58	Pending - CAB	Medium	Service Desk	Ingo Engels	Change Management Team	James Stewart		a

5. Select the request checkbox on the left
6. Click the Add button
7. Click Done.

The screen defaults to the Groups list.

2.5 Change

- ◆ [Section 2.5.1, “Change Management,” on page 409](#)
- ◆ [Section 2.5.2, “Change Groups,” on page 458](#)
- ◆ [Section 2.5.3, “Grouping Change Requests,” on page 471](#)
- ◆ [Section 2.5.4, “Grouping Requests,” on page 472](#)
- ◆ [Section 2.5.5, “Related Requests,” on page 475](#)
- ◆ [Section 2.5.6, “Releases,” on page 475](#)
- ◆ [Section 2.5.7, “Deployments,” on page 511](#)
- ◆ [Section 2.5.8, “Deployment Tasks,” on page 517](#)

2.5.1 Change Management

- ◆ [“Implementing Change Management” on page 410](#)
- ◆ [“Change Requests \(RFCs\)” on page 411](#)

The goal of Change Management is to ensure that standardized procedures are used to efficiently handle all changes, and minimize the impact of any related Incidents upon a service. The Change Management process prevents unauthorized CMDB modifications and reduces disruption to Customers. It does this by coordinating the build, test and implementation of any change that impacts the CMDB.

Changes may arise reactively in response to Problems or externally imposed requirements, for example a new or changed regulatory situation. They may also be proactive, instigated by management to improve an organization’s efficiency and effectiveness, or to enable or reflect new service improvement initiatives.

The Change Advisory Board (CAB) is responsible for approving any Request for Change (RFC). This involves assessing the impact, resources and priority of the RFC. The CAB then advises the Change Manager of their assessment and assigns an appropriate Workflow.

Change Workflows within the system ensure that each RFC is handled with consistency, based on the risk and impact assessment of the CAB. Change Workflows define the actions required to correctly implement the change, and define the responsibilities, authorization and timescale expected to manage the change.

Once a Workflow is assigned to an RFC, it is routed to an appropriate Technician based on the Change Workflow State. After a Technician completes their assignment, the RFC is forwarded to the next Technician based on the next state of the Change Workflow.

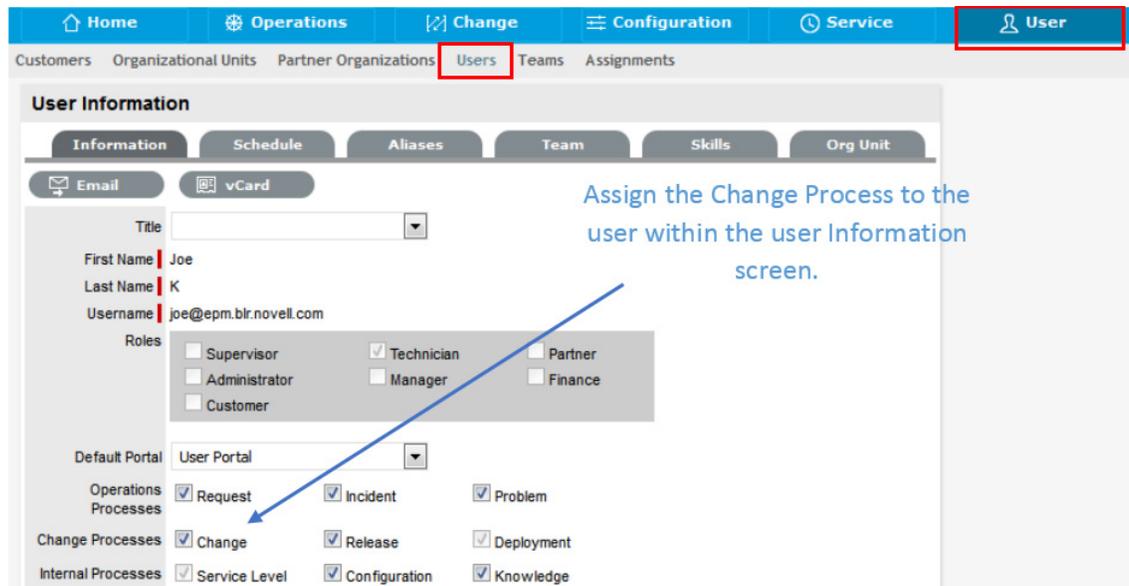
When the RFC has progressed through all of the required Workflow States, a change review is undertaken to verify that the RFC has achieved its objectives. If the change objectives are not met, the RFC’s associated back-out procedure is implemented to rollback the change and restore the CMDB to a valid state.

As part of the Change Management Process, all requests related to a Change Request are automatically closed when the related RFC is closed. The system views the request hierarchy from low to high as Service Request, Incident, Problem and Change Request, and if a related request of a higher type is closed, all the lesser type requests are automatically closed.

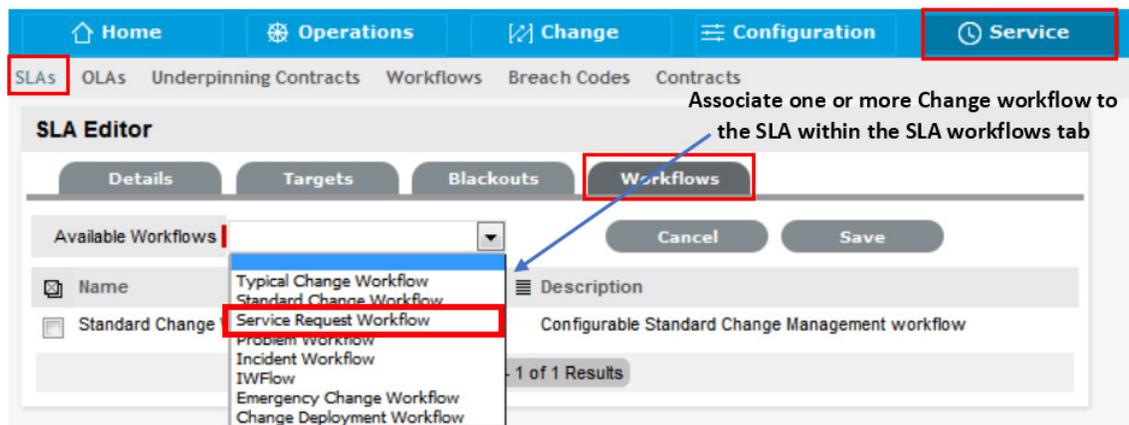
Implementing Change Management

To set up the Change Management Process in the system, the following steps are to be completed:

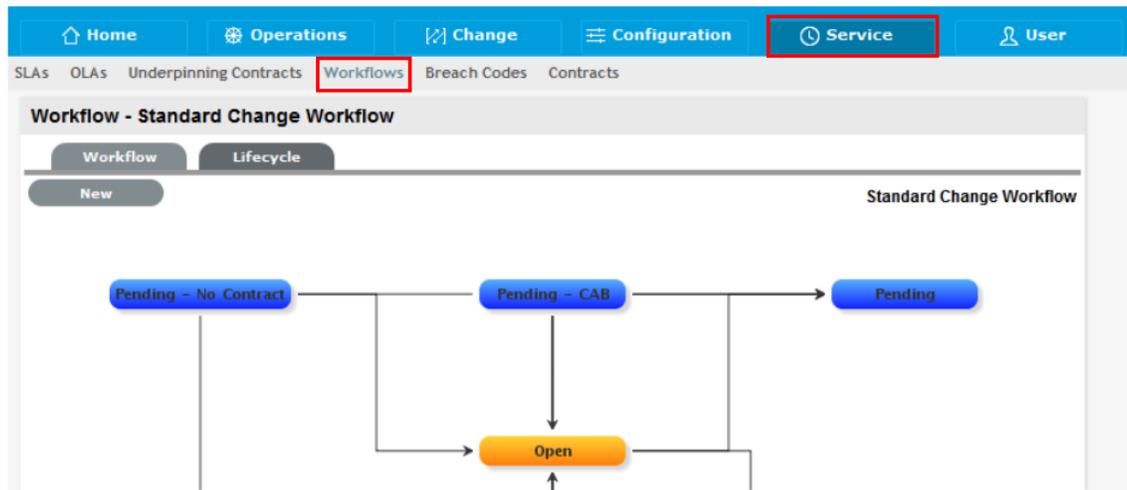
1. Assign the Change Process to the relevant Users within the User Information screen under the User>Users tab.



2. Create or review the SLA within the Service>SLAs tab, and associate the Incident Service Request Workflow to the SLA in the SLAs Workflow tab. (NB: The Supervisor User setting up the SLA must be assigned the Internal Process of Service Level in their User Information screen to complete this action.)



3. Review on or more Change Management Workflows within the Service>Workflows tab.



4. Create a Change Management Team within the User>Teams screen.

The screenshot shows the 'User > Teams' screen in the Change Management interface. The top navigation bar includes 'Home', 'Operations', 'Change', 'Configuration', 'Service', and 'User' (highlighted with a red box). Below the navigation bar, there are tabs for 'Customers', 'Organizational Units', 'Partner Organizations', 'Users', 'Teams' (highlighted with a red box), and 'Assignments'. The main content area is titled 'Set the team options and associate Technicians within the information tab' and has sub-tabs for 'Information', 'Service', 'Group', 'States', and 'Layers'. The 'Information' tab is active, showing a form for 'Team Information'. The form has a 'Details' section with fields for 'Team Name', 'Process' (dropdown menu with 'Change Request', 'Service Request', 'Incident', 'Problem', 'Change Request', 'Release', 'Service Portfolio'), 'Team Lead', 'Incoming Email', 'Email Display Name', 'Customer Notification', and 'Technician Notification'. There is also a 'Location' section with fields for 'Address', 'City', 'State', 'Zip', 'Country', and 'Phone'. Annotations with blue arrows point to specific areas: 'Set the team options and associate Technicians within the information tab' points to the 'Information' tab; 'Associate Groups with workflow States in the States tab' points to the 'States' tab; 'Associate change workflow in the Service tab' points to the 'Service' tab; and 'Create Technician work Groups and Manager Approval Groups within the Group tab' points to the 'Group' tab.

5. Associate the SLA to an Item or Customer or Org Unit. This final step ties all the elements together when a Change Request is created, as the SLA associated with the Item, Customer or Org Unit assigned to the Request determines the Workflow, Team and Technicians that are made available within the Service Request Information screen.

Change Requests (RFCs)

- ◆ “Creating an RFC:” on page 413
- ◆ “Customer Tab” on page 414
- ◆ “Quick Calls” on page 415
- ◆ “Item Information” on page 417
- ◆ “Contract Tab” on page 419
- ◆ “Details Tab” on page 419
- ◆ “Analysis” on page 420
- ◆ “Summary Tab” on page 424
- ◆ “Notes Tab” on page 431

- ◆ “Attachments Tab” on page 436
- ◆ “Impact Tab” on page 437
- ◆ “Audit Tab” on page 442
- ◆ “Related Requests” on page 445
- ◆ “Closing Requests within Groups” on page 447
- ◆ “Status” on page 448
- ◆ “Updating a Request’s Workflow and Status” on page 448
- ◆ “Requests with a Pending-No Contract Status” on page 449
- ◆ “Viewing a Status Note” on page 449
- ◆ “Request Reminders” on page 449
- ◆ “SLA Triggers and Request Status” on page 450
- ◆ “Priority” on page 450
- ◆ “Setting RFC Priority” on page 450
- ◆ “RFC Assignment and Escalation” on page 451
- ◆ “RFC Assignment” on page 452
- ◆ “Automated Escalation” on page 452
- ◆ “Manual Escalation” on page 452
- ◆ “Escalation Control” on page 452
- ◆ “Notification” on page 453
- ◆ “Workflow” on page 454
- ◆ “Moving through the Workflow” on page 455
- ◆ “Approval State” on page 455
- ◆ “Assigning a State with an Underpinning Contract” on page 456
- ◆ “OLA Status Due” on page 456
- ◆ “Team Assignment during the Workflow Lifecycle” on page 456
- ◆ “Pending - No Contract Status” on page 457



The Change Request tab defaults to display all Requests for Change (RFCs) logged within the system. The available List Filters include:

Filter	Description
All Change Requests	Displays all Change Requests logged in the system regardless of their Status or Assignment.
My Change Requests (Active)	Displays all Change Requests in an active Workflow State that are assigned to the logged-in User.
My Change Requests (All)	Displays all Change Requests, in active and inactive Workflow States, that are assigned to the logged-in User.
My Teams Change Requests (Active)	Displays all Change Requests in an active Workflow State, allocated to the Teams with which the User is associated.
My Teams Change Requests (All)	Displays all the Change Requests, in active and inactive Workflow States, allocated to the Teams with which the User is associated.
Pending Approvals	Provides the User with quick access to a list of Change Requests that require Manager approval. (This is only available if the User has Manager access.)

The default display is ten RFCs per batch. The list can be re-sorted by clicking on a column header and the number of RFCs displayed per batch can be altered using the Display pop-up option.

Creating an RFC:

To create an RFC within the Change Requests tab, the following information is required:

- ♦ [Customer Details](#)
- ♦ [Item Details](#)
- ♦ [Contract Details](#)

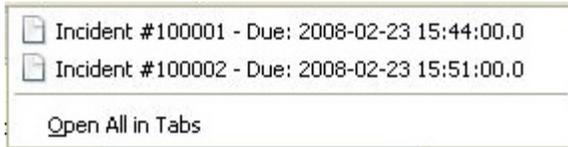
Change Request Search Tips:

- ♦ The Change Request search option has a default Status to search only Active Requests. To ensure search success, select the relevant Incident Status, if unsure, select All
- ♦ To search for multiple RFC numbers at once, insert a comma separator between ID numbers
- ♦ To search based on an RFC status, select the RFC Workflow option from the Workflow drop-down list. Once selected, a list of States is displayed
- ♦ To search by Classification, select an Item Category from the Category drop-down list. After the category is chosen, a list of Classifications is displayed
- ♦ To search based on the content of an RFC Description, select the Full Text option within the Search and enter a relevant term.
- ♦ To search using an Item's Custom field information, select the Item Category to display any Custom Fields enabled for that Item.

RSS Feeds

To easily access up to the minute details regarding Change Request activity within an RSS feed browser bookmark, Users can subscribe to RSS feeds by selecting the RSS button within the Change Request list. When the RSS button is selected, Users are presented with the application options for subscribing to receive the information and where the Recent Activity information is to be accessed. To readily access the information through a browser window, save the feed the to the Bookmark Bar.

The following is an example of the information obtained by clicking on the RSS bookmark:



Customer Tab

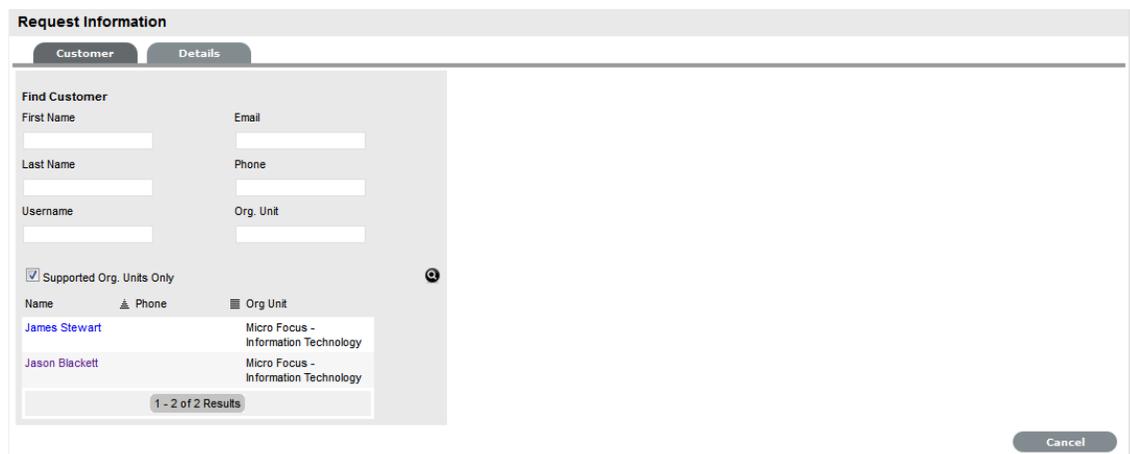
The first step in creating a new RFC requires that a Customer be assigned to the request. There are two ways to assign a Customer to an RFC, either search and select an existing Customer or create a new one.

Create an RFC for an existing Customer

To search for and assign a Customer who already exists in the system:

1. Go to Change>Change Requests
2. Click New
3. Search and select a Customer

Within the Find Customer field, enter any known Customer details or leave the search field blank to access the complete Customer List. If Custom Fields have been enabled in the Customer Information screen, the Advanced Search option can be used to search on data recorded within these fields.



The screenshot shows the 'Request Information' dialog box with the 'Customer' tab selected. It features a 'Find Customer' section with input fields for First Name, Last Name, Username, Email, Phone, and Org. Unit. There is a checkbox for 'Supported Org. Units Only' and a search icon. Below the search fields, a list of search results is displayed, showing names and organization units. A 'Cancel' button is located at the bottom right.

Name	Phone	Org Unit
James Stewart		Micro Focus - Information Technology
Jason Blackett		Micro Focus - Information Technology

1 - 2 of 2 Results

Cancel

4. Click  to search the Customer database
5. Select the relevant Customer Name hyperlink to assign the Customer details to the RFC.

The screen will open the Find Item field.

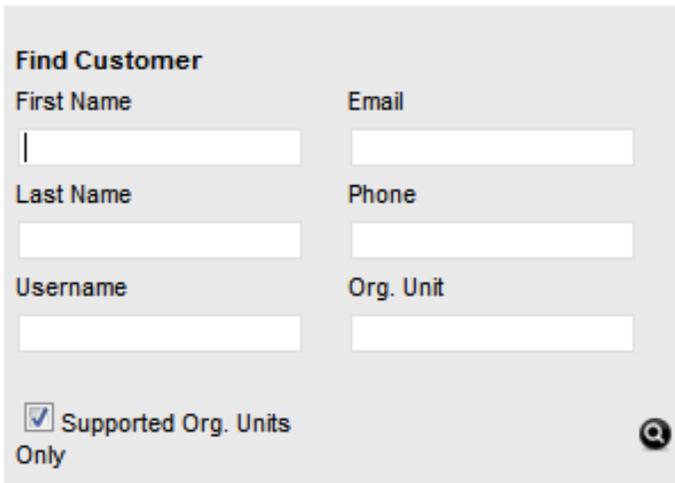
Create an RFC for a new Customer

If the Customer does not exist within the system, an account can be created when entering the RFC:

1. Select Change>Change Requests
2. Click New
3. Within the Find Customer field, select 
An expanded editable Customer Details form is displayed.
4. Enter the Customer details
5. Click Save
The form will revert to a non-editable screen of the newly entered details.
6. Click Next to assign an Item to the RFC. Or select Quick Call if a template is to be used.

Supported Org Units Only option

This option is visible within the Find Customer search field, if the logged in User has been assigned to support specific Organizational Units. Uncheck the option, if search results are to include Customers belonging to all Organizational Units recorded in the system.



Find Customer

First Name	Email
<input type="text"/>	<input type="text"/>
Last Name	Phone
<input type="text"/>	<input type="text"/>
Username	Org. Unit
<input type="text"/>	<input type="text"/>

Supported Org. Units Only 

Quick Calls

Quick Calls are used for common requests that are logged using a template during the Change Request creation process.

If the Quick Call functionality is enabled for the system, after the Customer and if relevant, Item details are assigned to the RFC, within the Details tab the Quick Call options are displayed below the dashed line in the Request Type drop-down list.

NOTE: Quick Call Templates also define the stage of the Workflow for the RFC being created, which enables pre-approved RFCs to be created in the system.

Quick Calls and Item Assignment

When creating a Quick Call, an Item can be assigned after the Customer information has been set or when the Quick Call template is applied to the Request.

If the Item is to be assigned to the RFC using the Quick Call Template configuration, the User simply selects the Next button after assigning the Customer information to the RFC. The application moves to the Details tab and within the Request Type options, the list displayed only includes Templates that have Items preset.

NOTE: The Next button will only be visible after the Customer has been assigned to the RFC, if Quick Call templates that have Items assigned are configured in the system.

If a specific Item is associated with the Quick Call Request within the Customer tab, the options displayed within the Request Type drop-down list will include Quick Call templates associated with the Item Type already assigned to the Request, and templates assigned the Unknown Item.

For RFCs created with multiple Items assigned that use different Items, Quick Call templates with no Items assigned are displayed. For RFCs where the same Item is assigned on multiple occasions, Quick Call templates that have the matching Item and no Items assigned are made available in the Request Type drop-down list.

To create an RFC using a Quick Call:

1. After allocating a Customer and Item(s), click Next to move to the Details tab

The screenshot shows the 'Request Information' form with the 'Details' tab selected. The 'Request' section includes a 'Request Type' dropdown menu with options 'Update OS', 'New Change', and 'Update OS' (separated by a dashed line). Below it is a 'Classification' dropdown menu with 'Update OS' selected. The 'Subject' and 'Description' fields are present, with a rich text editor for the description. The 'Details' section on the right has three input fields labeled 'Custom 1', 'Custom 2', and 'Custom 3'. At the bottom right, there are 'Cancel' and 'Done' buttons. The status bar at the bottom shows 'Path: p' and 'Words: 0'.

2. Within the Request Type drop-down list, select the relevant Quick Call template displayed below the dashed line
3. Assign the Classification
4. Click Done

All RFC details will be populated according to the Quick Call template. Any amendments can be made through the RFC Summary screen.

5. Click Save.

NOTE: When saved, the Request created using the Quick Call template can be duplicated to minimise data entry requirements for multiple similar Requests.

Item Information

After the Customer details are assigned to the RFC, an Item or Items are associated with the Request. This assignment sets all the relationships of the Item(s), including service level agreements and Team assigned to support the RFC.

If the Customer assigned to the RFC owns Items directly, they are listed below the Find Item search box. By default, the list is defined by the All Assigned Items option, but it is also possible to search by:

- ◆ All Items
(Only visible if the Search All Items option is enabled within Admin>Setup>Privileges>User tab.)
- ◆ All Assigned Items (Customer and Organizational Unit)
- ◆ Assigned Items by Customer
- ◆ Assigned Items by Organizational Unit.

The screenshot displays the 'Request Information' interface. On the left, the 'Customer' tab is active, showing details for James Stewart, including his name, email (james@nsd.com), and organizational unit (Micro Focus - Information Technology). On the right, the 'Find Item' search panel is visible. It includes fields for 'Item Number' and 'Item Type', checkboxes for 'Include Global* Items' and 'Active Items Only', and radio buttons for search criteria: 'All Items', 'All Assigned Items' (selected), 'By Customer', and 'By Org. Unit'. A 'Category' dropdown is set to 'Mobile Devices', and 'Advanced Search' is checked. Below these are 'Field' and 'Value' input fields, with 'Memory Card' and 'IMEI Number' selected. At the bottom, a table shows search results:

Item #	Item Type	Identifier	Status
Service Desk	Service Desk		Available
Wifi Service	WIFI Service	Type:	Available

The interface also shows '1 - 2 of 2 Results' and a 'Cancel' button.

The list can be filtered using the Include Global* Items option. This will display Items that are available to all Users in the system, as they have not been assigned to a specific Customer or Organizational Unit. It can also be filtered using the Active Items Only option, which means only Items that are assigned an active lifecycle state are displayed if the option is checked.

Multi-Item Requests

The system also allows for multiple Items to be assigned to a Request during the Request creation process, if relevant. This results in separate RFCs being created for each Item assigned to the initial RFC, which are then displayed within the Related Requests window within the Change Request Information screen.

The Requests are managed as individual RFCs to cater for any special requirements relative to each Item. For example, consider a situation where a Team rolls-out an update in an organization. In this instance, during the Request creation process multiple Items are assigned to a single RFC, which the system automatically allocates to separate RFCs that are then managed on an individual basis. This allows appropriate Teams/ Technicians to be assigned to the RFCs relative to their skill-set or

departmental assignments. The implementation process more effectively differentiates between the tasks and Items being modified and ensures each Item has its own Audit Trail, Attachments and Notes for future reference.

Multi-Item Requests are listed as separate RFCs within the Change Requests List View, and can be accessed as a group with the Change Groups List View.

RFC Item Assignment

To assign an Item to the RFC:

1. Click the relevant Item link if listed below the Find Item search box

Or, [Search for an Item](#) or click **+** to [Create an Item](#)

The option to create an Item is only available to Technicians if the system Administrator has enabled the Create Items option within the Setup>Privileges>User tab.

The screenshot shows a web form titled "Request Information" with two tabs: "Customer" and "Details". The "Customer" tab is active, displaying the following information:

Customer	
Title	
Name	Andy Fair
Org. Unit	Micro Focus - Head Office
Room	
Email	andy@nsd.com
Phone	
Mobile	
Fax	
Pager	
Address 1	
Address 2	
City	
State	
Zip	
Country	

The "Item" tab is also visible, showing the following information:

Item	
Item Number	Microfocus - Intranet
Category	Service
Item Type	Website Services
Identifier Type	Intranet
Team	Service Request Team
Room	
Service	Warranty
Expiry	Expired

At the bottom right of the form are three buttons: "Cancel", "Add", and "Next".

2. Click Next to move to the Details tab if only one Item is to be assigned to the Request

Or, select Add to assign additional Items. If Add is selected, a Request Selections window will be displayed that lists all the current Items assigned to the Request.

The screenshot shows a window titled "Selections" with a table of items. The table has columns for "Customer", "Item No.", and "Item Type".

Customer	Item No.	Item Type
James Stewart	Wifi Service	WIFI Service

At the bottom of the window, there is a button labeled "1 - 1 of 1 Results".

3. Continue to add all the relevant Items to the Request and then select Next to move to the Details tab.

Within the Details tab, the RFC is profiled by assigning a Classification and RFC Description.

Contract Tab

When Contracts are enabled for the system, the Contract tab is visible within the Change Request Information screen.

The Contract tab of a Request includes the details of the Contract Type and SLA assigned to the Request. If a valid contract is active for the Customer, Item or Organizational Unit assigned to the Request, then the details of the contract will be displayed. If an SLA is not assigned to the Customer, Item or Org Unit and the Billing functionality is not enabled, the system automatically applies a default SLA based on the Item Type or the system default SLA.

The screenshot shows the 'Change Request Information' screen with the 'Contract' tab selected. The 'Contract' section displays the following details:

- Contract Type: Per Item
- Service Level: Warranty
- Time: Subscription
- Start Date: 01/06/16 12:09
- End Date: 02/05/17 23:59
- SLA Price: \$0.00
- Taxable:

Below these details is a 'Targets' table with the following columns: Priority, Response Time, Restoration Time, Resolution Time, 24 x 7 support, and Alert.

Priority	Response Time	Restoration Time	Resolution Time	24 x 7 support	Alert
Urgent	6 Hours	12 Hours	24 Hours	Yes	None
High	12 Hours	24 Hours	48 Hours	Yes	None
Medium	18 Hours	36 Hours	72 Hours	Yes	None
Low	24 Hours	48 Hours	96 Hours	Yes	None

A 'Done' button is located at the bottom right of the screen.

When Billing is enabled and the Contracts or Invoices functionality is active, the system verifies the service entitlement status of the Customer assigned to the Request, and if a valid contract is not in place, the Request is assigned a status of Pending-No Contract and locked until a valid contract is associated with the Request. The Customer is automatically sent the NoContractCreateRequestSummary email when the Request is saved with this Status.

The screenshot shows the 'Change Request' screen with the 'Summary' tab selected. The 'Status' is 'Pending - No Contract'. Below the status are 'Open' and 'Cancel' buttons, and an email icon.

A reminder email can be sent to the assigned Customer by the Technician from within the Summary tab by clicking .

Details Tab

To successfully create an RFC, the Request must be profiled by completing the Request Type, Classification and Description details. Within the Details tab, there is also the option to select any relevant Quick Call Templates that have been configured for the Item Type assigned to the RFC.

Entering an RFC Description

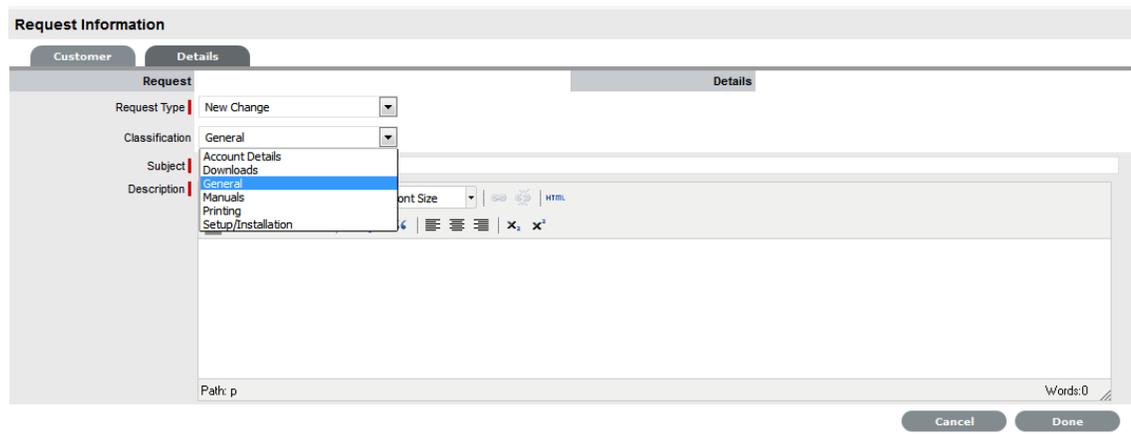
To profile the RFC:

1. Define the Request Type

The New Change Request option is locked in if there are no Quick Call templates available for the Item or Process.

2. Select a Classification

If multiple Items are assigned to the Change, the option to assign a specific Classification for each Item Request is provided.

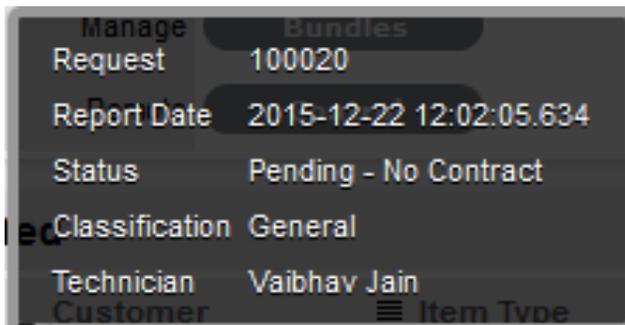


3. Complete any required customized fields
4. Define the Subject content, if desired
5. Enter all relevant information within the Description field
This is a mandatory field.
6. Click Done to enter the new RFC into the database.

A unique reference number is generated automatically for the request at this point. When a Change is submitted successfully, the RFC Summary Tab is displayed. If the Force Analysis functionality is enabled in the application's Setup, the system will move to the Analysis Tab.

Request Subject

It is recommended that a summary be included in the Subject field, as the details recorded in the Subject field are displayed in scroll-over summaries throughout the application. For example, when a new Request is being entered for a Customer, a Recent Customer Requests list is displayed during the Request creation process for all Items the Customer owns either directly or via shared ownership. The Requests list includes a scroll-over summary where Subject content is displayed, if the Subject is completed for a Request. Subject information can also be included within a column in the Change Requests List View, for a quick glance summary of a Change Request.



Analysis

Within the Change Request Analysis tab Backout Procedures can be created or the current RFC can be related to other requests. The options within the Change Request Analysis tab include:

Analysis Tab Drop-down Options

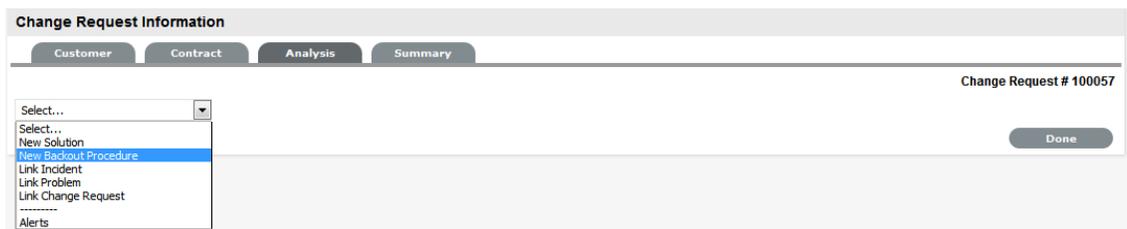
New Solution	Displays Knowledge Base editor to allow the User to enter a new Solution. Solution Articles are used as Proposed Solutions for future requests.
New Backout Procedure	Allows the User to create fallback plan, should the implementation of the Change Request not go to plan.
Link Incident	Allows the User to enter full text or ID number to search on Incidents. Select a No. link to immediately link the current RFC to Incidents.
Link Problem	Allows the User to enter full text or ID number to search on Problems. Select a Problem ID number to immediately link the current RFC to Problems.
Link Change Request	Allows the User to enter full text or ID number to search on Change Requests. Select a Change Request ID number to immediately link the current RFC with other Change Requests.
New Release	Allows the User to create a new Release package that is automatically associated to the RFC to manage the environment update.
Link Release	Allows the User to associate the RFC to an existing Release.
Alerts	Allows the User to create an Alert directly related to the Request. Displays any reminder alerts that have been created in the Summary tab of the Request. Select the Alerts option to view Alerts list, and click on an Alert Publish Date to view Alert Content.

Creating a Backout Procedure

RFC's can implement a Backout Procedure if a necessary fallback plan is required.

To create a Backout Procedure:

1. Select an RFC from Change > Change Requests
2. Go to the Analysis tab
3. Click Edit
4. From the drop-down list select New Backout Procedure



5. Adjust the Review Date, if relevant
6. Complete the Summary and Content fields

7. Upload any relevant attachments
8. Click Save.

Once the Backout Procedure is created for an RFC it can be viewed via the Request. To view a Backout Procedure:

1. Select the Analysis tab for the RFC
2. Select the View Backout Procedure option.

The page will expand to display the article.

The screenshot displays a web interface for a Change Request. At the top, there are tabs for 'Customer', 'Contract', 'Analysis' (which is selected), and 'Summary'. Below the tabs is an 'Edit' button and the text 'Change Request # 100090'. The main content area is divided into sections: 'Flags' (ID 40, Type Back out Procedure, Visibility Assigned Request, Status Published, Item Category Hardware, Classification General, Review Date 11/02/12), 'Item Types', 'Content' (Summary: The upgrade process has failed., Content: Re-install the previous version.), and 'Statistics' (Views:0, Last: Votes: Rating:). At the bottom, there are 'Attachments' and 'History' buttons. The 'Created' date is 05/03/12 12:16 and the 'Revised' date is 05/03/12 12:17. A 'Direct Link' is provided: <http://localhost:8080/LiveTime/WebObjects/LiveTime.woa/wa/LookupArticle?articleId=40>.

Linking Requests

Within the Analysis tab, RFC's can be linked to other Incidents, Problems, Change Requests and Releases that are new or pre-existing.

Link with Requests

Link Incident	Allows User to enter full text or ID number to search on Incidents. Select an Incident ID number to immediately link the current RFC to an grouped Incident.
Link Problem	Allows the User to enter full text or ID number to search on Problems. Select a Problem ID number to immediately link the current RFC to a grouped Problem.
Link Change Request	Allows the User to enter full text or ID number to search on Change Requests. Select a Change Request ID number to immediately link the current RFC to a grouped Change Request.
Link Release	Allows the User to enter full text or ID number to search on Releases. Select a Release ID number to immediately link the current RFC to an existing Release group.
New Release	Allows the User to create a Release and manage the RFC implementation as part of Release and Deployment lifecycle. When selected, the screen defaults to a New Release Information window, where the Title and Description can be entered and other options edited and automatically associates the current RFC. For further information about Releases

To link a request to a Group, within the Analysis tab:

1. Select Edit
2. Search for a Request Group using the full text or ID option
3. Select the relevant search result ID number.
This automatically adds the current RFC with the existing group.

Creating an Alert

Within the Analysis tab, an Alert that is associated with the Request can be created by:

1. Select Edit within the Analysis tab
2. Select the Alerts option in the drop-down list
The New button is made accessible
3. Click New
4. Refine the content for each required field

Alert Details	Description
Created	The current date and time.
Publish	The date the Alert is published. Use the calendar icon to the right of the field, to select a Publish date. Set to a date in the future, or use the default to publish the Alert immediately.
Dismiss	The date the Alert ceases to be available. Use the calendar icon to the right of the field, to select a Publish date. On this date, the Alert will disappear from a User's Alert list.
Severity	The type of Alert to be published. The choices are: <ul style="list-style-type: none"> ◆ Information – for general Alerts ◆ Warning – to warn Users of potential issues ◆ Urgent – to publish an urgent actionable message. <p>The icon appearing with the message will depend on the type of Alert.</p>
User	The type of Users to receive the Alert, which include: <ul style="list-style-type: none"> ◆ Specific Customer or User ◆ User Role ◆ Personal Alert ◆ Organizational Units. <p>In the Find User or Customer list, click search to select the recipient from the drop-down list.</p> <p>An Alert sent to a User Role will go to all Users with that Role.</p> <p>A personal Alert appears on the User's own screen at the Publish date.</p>
Title	Enter the title of the Alert.
Message	Enter the main content of the Alert.

5. Click Save.

Summary Tab

- ◆ [“Summary” on page 424](#)
- ◆ [“Changing an RFC's Item or Customer” on page 428](#)
- ◆ [“Item Relationship Map and Assignment” on page 429](#)
- ◆ [“Updating the Item associated with the Request” on page 430](#)

Summary

The Summary tab provides comprehensive details related to an RFC and gives access to the tabs required to work on the RFC.

IMPORTANT: In the Summary page, you can view or update the available details:

- ◆ To view details of a Customer, select the Customer name link within the Change Request Information screen.
 - ◆ To update details of the **Customer** and the **Item** assigned to the Change Request, click  within the Summary tab when the change request is in Edit mode.
-

The Change Request Information Summary tab includes the following:

Summary Tab	Description
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<i>Details</i>	
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The following details are displayed:

- ◆ **Customer:** The customer assigned to the RFC. Click on the customer name link to view customer information. Scroll over the information icon  next to the **Customer** for quick information such as **Username, Org.Unit, Phone** and **Local Time**.
- ◆ **Item:** An item assigned to the RFC. Select the **Item Number** link for more information about the Item. Scroll over the information icon  next to the **Item Number** to view Item information recorded on the **Details** tab.

 is visible next to the Item Type, if the RFC is in a Workflow State with the Item Editable option is set to Yes. Click the icon to edit the Item details.

Click  to view the Item Relationship map. Any Item displayed in the map can be set as the Item associated with the Incident, by making it the central node of the Relationship map and clicking on the centralized map icon to confirm the Item assignment change.

- ◆ **Type:**

 is visible when the RFC is created as part of the "Control CMS via RFC" functionality and the RFC was created due to an Item update or creation. It appears in an Item Editable stage of the Change Workflow and allows the Item update details that prompted the creation of the RFC, which will be detailed in the Description field, to be applied to the CMDB.

- ◆ **Classification:** Displays the RFC Classification that was selected when the Change Request was created. This can be updated, if required.

- ◆ **Urgency:**

- ◆ **Impact:**

- ◆ **Priority:** Shows the Priority of the RFC, which determines the Service Level triggers applied to the Request.

If the Derived option is enabled in the applications Setup, then the Urgency and Impact drop-down lists are displayed. The User is required to select the corresponding Urgency and Impact for the Change Request to alter the Priority assigned.

Summary Tab	Description
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Assignments The following details are displayed:

- ◆ **Escalation:** This is visible if the Escalation Control option is enabled in the application Setup. This is only available to the Supervisor, and allows them to disable the escalation timers.
- ◆ **Escalation Layer:** Shows the name of the current Group of Users assigned to the Request. When the Workflow State is updated, this could also result in an update of the assigned Group of Users.
- ◆ **Technician:** The name of the Technician assigned to the RFC.
- ◆ **Subject:**
- ◆ **Description:**

Notification The following details are displayed:

- ◆ **Customer:** Shows how updates regarding the RFC are sent to the Customer who logged the RFC, or to all Owners of the Item associated with the RFC.
 - ◆ **Customer CCs:** *Customer CCs* is a free text field for any additional notification recipients, these can be divided into Customer and Technician CC lists.
 - ◆ **Technician:** Allows the User to adjust the default Technician notification between None, Email or SMS for updating the assigned Technician, all Technicians in the Team or Layer of Escalation assigned to the RFC.
 - ◆ **Technician CCs:** *Technician CCs* is a free text field for any additional notification recipients, these can be divided into Customer and Technician CC lists.
 - ◆ **Alternate Team:** Is visible if the Notify Alternate Team option is enabled in the Admin>Email>Setup tab. This allows the User to define another Team to be notified about updates regarding the RFC.
-

Summary Tab	Description
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<i>Change Request</i>	
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The following details are displayed:

- ◆ **Team:** Displays the default support Team assigned to the RFC. This can be changed by selecting another option within the drop-down list. The Team list is derived from the Workflow and Workflow State.
- ◆ **Workflow:** Displays the default Workflow assigned to the RFC. This can be changed by selecting another option within the drop-down list. The Workflow list is derived from the SLA assigned to the RFC.

Select  to view the Workflow in its entirety.

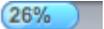
- ◆ **Status:** Shows the current Workflow State of the RFC.
- ◆ **Next Action:** Lists all the states available after the current RFC State. This is based on the Workflow assigned to the RFC. To move the RFC through the Workflow, select a Status included in the list displayed.

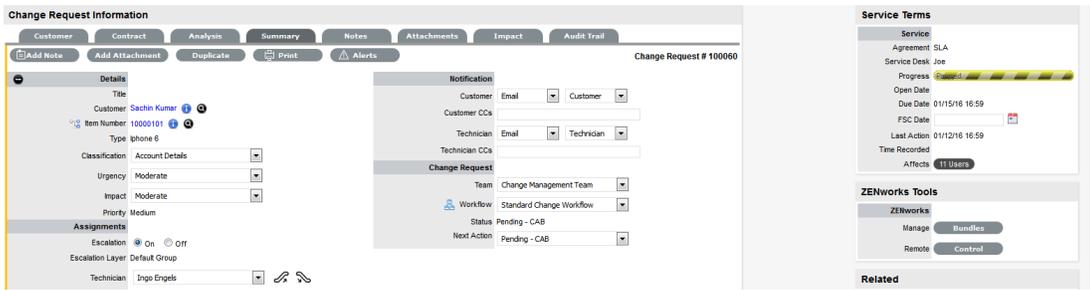
By assigning a different Workflow State, the Work or Manager Group assigned to the RFC may also be automatically updated, based on the Workflow and Team Configuration. Refer to the Escalation Layer and Technician Fields to view if an assignment change is made as part of the Status update.

- ◆ **Status Due:** Details the expiry time for the current Workflow State if the State has an OLA assigned.

<i>Service Terms</i>	
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The following details are displayed:

- ◆ **Agreement :** Displays the Service Level Agreement assigned to the RFC. The service level is derived from either the Item, Customer or Organizational Unit.
 - ◆ **Service Manager:** Displays the name of the Service Level Manager responsible for overseeing Requests related to the assigned service agreement.
 - ◆ **Progress:** Visually displays how the Request is tracking against the assigned SLA and displays the percentage of SLA used when greater than 10%. The grey progress bar is gradually filled in based on the status:
 - ◆  - Workflow is in an SLA paused state. Triggers will not fire.
 - ◆  - Workflow is in an SLA timers on state. Triggers will fire.
 - ◆  - Workflow is in an Exit state and the SLA has been successfully maintained.
 - ◆  - Assigned SLA has been breached and Workflow is in an Exit state.
 - ◆ **Dates:** Summarizes the important date details for the RFC. The Due Date is automatically calculated based on the Service Level assigned to the RFC.
 - ◆ **Time Recorded:** Displays the amount of time the Request has been open and worked on.
 - ◆ **Affects:** Displays the number of Users assigned to the Item.
-



NOTE: Only Technicians assigned to the Workflow Group associated with the RFC can edit the Change Request.

Summary Tab Buttons

	Edit opens the Request in edit mode. This allows the Request details to be amended, Notes to be added and time is automatically recorded against the Request whilst in edit mode.
	Changes the default assignee of an RFC to a different technician. This right is available only for technicians belonging to the same layer or team.
	Opens the Request in edit mode and moves directly to the New Note editor.
	Duplicate creates a copy of the Request and links the copy to the original Request. The User can then amend the Customer or Item details, if required.
	Print opens a summary of the Request in a Print View window. This includes a Description and all Notes added to the Request. It is a good alternative for viewing Request information within one window when adding a new Note.
	Allows the User to create or view reminders related to the RFC. When published it will be displayed like the normal alert icon.
	This option is visible next to the Item Type, if the RFC is in a Workflow State with the Item Editable option is set to Yes. Click the icon to edit the Item details.
	The escalation buttons allow the User to escalate the Request to the next layer within the Team, or de-escalate the Request to the lower level, if required.

Changing an RFC's Item or Customer

After an RFC is created, it may be necessary to change the assigned Customer or Item. This may be the case when the Unknown Item is associated with a RFC, or a Service Item has been assigned to the RFC and the relevant hardware, software or network Item needs to be associated with the request. When the "Allow Unknown" option is disabled in the Setup>Privileges>Requests tab and a Request that is assigned to the Unknown Item is opened in Edit mode, the User will be prompted to update the Item assigned to the RFC before the Save button action can successfully record changes to the RFC.

NOTE: This option is also required when a request is created through email, as the Item assigned may be the system's default Unknown Item or the Org Unit's default Item.

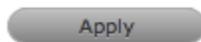
To change the Item:

1. Click the RFC's Edit button

2. Select the RFC's Customer tab
3. Click the Item Number 
The Find Item option appears.
4. Search and select a new Item
5. Click Apply to update the RFC
6. Select the Summary tab to continue working on the RFC, or click Cancel and Done to close the RFC with the newly assigned Item.

To change the Customer:

1. Click the RFC's Edit button
2. Select the RFC's Customer tab
3. Click  next to the Customer Name
4. Search and select a Customer
5. Click



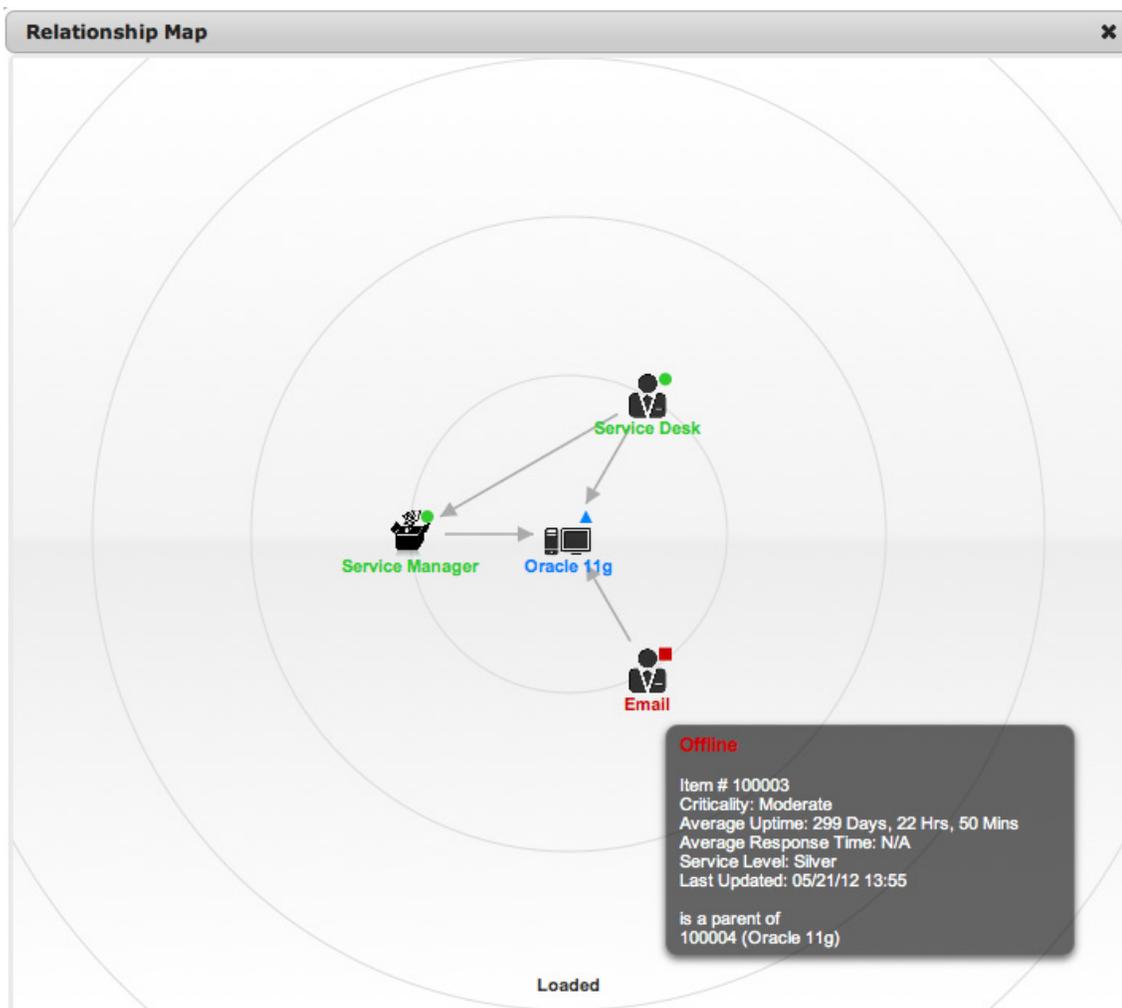
If the RFC's Item needs to be altered as a result of the Customer change the Find Item field appears. Search and select the appropriate Item using the Find Item search.

6. Select the Summary tab, to continue working on the RFC
7. Click Save.

NOTE: Technicians do not have the ability to delete Change Requests or Customers.

Item Relationship Map and Assignment

Selecting  opens a pop-up window that displays a map of Items that are related to the Request Item that can be navigated by clicking on the icons within the map. To view related Item information, scroll over the relevant Item icon.

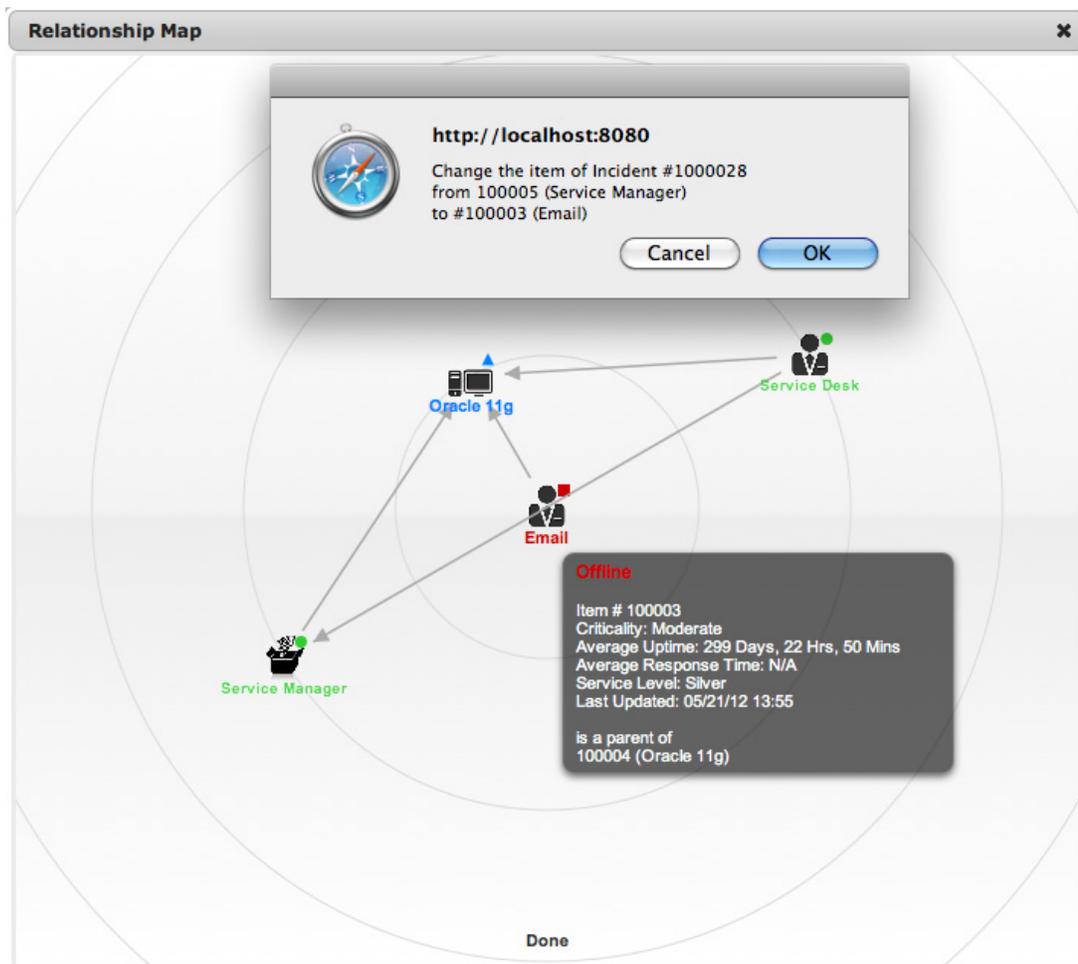


Updating the Item associated with the Request

The Item associated with the Request can be updated when in the request is in Edit mode:

See: [Item Relationships](#).

1. Select 
2. Navigate the map to move the relevant Item icon to the central point of the map
Select the Item icon label in the Map to move it to the central node.
3. Click the icon label when it is in the middle of the map
A warning message is displayed, prompting the confirmation of the Item change.



4. Select OK and the Item association will be updated
(If the Enable Item Shadow option is enabled by the Administrator in the Setup>Privileges>Customer tab, the change of Item information will not be visible on the Customer Portal.)
5. Select **X** to close the window.
The Item assignment change is recorded in the Audit tab.

Notes Tab

- ◆ "Notes" on page 432
- ◆ "Add Note Button" on page 432
- ◆ "Viewing All Notes" on page 432
- ◆ "Adding a Note" on page 432
- ◆ "Create Knowledge" on page 433
- ◆ "Solution" on page 434
- ◆ "Draft Note" on page 434
- ◆ "Changing the Status of a Note" on page 434
- ◆ "Viewing a Note" on page 435

- ◆ “Replying to a Note” on page 435
- ◆ “Emailing Saved RFC Notes” on page 435
- ◆ “Adding Notes to Groups” on page 436

Notes

The RFC Notes tab displays entries made by a User regarding the Change Request. New Notes are date-stamped automatically and associated with the User logging the Note.

The number of Notes recorded against a Request is displayed in brackets on the Notes tab, and if a Note has been added by a Customer or a Technician other than the Technician assigned to the Request, an asterisk will also be visible on the Notes tab until the assigned Technician opens the Note.

Add Note Button



The Add Note button can be used to open the Change Request in Edit mode and automatically access a new Note window, as shown in Step 4 below.

Viewing All Notes



Use a Change Request's Print button to access a list of all Change Request Notes in one screen. To hide Private Notes in the Print output, remove the tick from the Show Private Notes box.

Adding a Note

When the first Note is created for a Change Request, the Request Description automatically populates the New Note editor allowing the Technician to enter their response.

To add a Note:

1. Click the RFC ID Number
2. Click Edit
3. In the Notes tab, click New
4. Enter the Note details

Or, select a Template, if a relevant pre-configured response has been set for the Item Type or Category for the Item assigned to the Change Request.

5. Enter Note Time

The time entered represents the amount of time accumulated to formulate the Note's content or time spent working on a request away from the system. If no additional time has been spent on the Request away from the application this field will be automatically populated with the Logged Time when the Request is in Edit mode, if the Manual Request Time option is disabled in the

Setup>Privileges>User tab. When this option is disabled,  is visible next to the Change Request number in the top right corner of the Summary Tab screen when the Request is in Edit mode.

6. Adjust the time and date work was completed, if required

7. Add attachments to be sent with the Note, if required

A maximum of two attachments can be added per Note.

8. Adjust the Note visibility, if relevant

The default Private or Public visibility for Email Notes is set within Admin>Setup>Privileges>Requests, and can be adjusted on a per Note basis.

9. Refine the Email Recipient options as required

The default Request Notifications for Notes is set within the Team assigned to the Request, and can be adjusted on a per Note basis.

Vendors, as Email Recipients, is displayed as an option if the Change Request is in a State associated with an Underpinning Contract.

10. Click .

NOTE: A Technician can only add RFC Notes if they belong to the work group associated with the current RFC status.

Create Knowledge

When a new Note is created for a Request it can be added to the Knowledge Base by selecting the Create Knowledge option. By selecting this option and then manually moving the Request to a Closed State, the system automatically creates a Solution Knowledge Base Article with a visibility of Assigned Request. This visibility allows Customers of a shared Item assigned to the Request to also

view the Solution. For the Solution to be available to other Customers of the same Item Type, the visibility must be adjusted to Technicians and Customers within the Analysis tab or the Knowledge Tab.

Solution



If a Note resolves the issue, the Note can be saved as the Solution. This will convert the Note into a Solution Article (found under Change Request>Analysis tab), by enabling the Create Knowledge option before selecting the Solution button. Clicking the Solution button will automatically move the Change Request to the default Closed State. If the Solution button is applied to a Change Request containing attachments, the attachment is included in the Solution email.

To save a Note as the Solution:

1. Enter the Note details
2. Select Create Knowledge, if the Note content is to be available in the Knowledge Base
3. Click Solution.

For Create Knowledge enabled Notes, the content will be recorded as the solution under the Analysis tab. The Status of the Change Request will change to default exit State of the assigned Workflow.

Draft Note



Use the Draft button to save an incomplete Note entry, which will be displayed in the Notes list. When a Note is saved as a draft, the Status will be displayed as . If the Add Note button is selected when a draft Note has been recorded against a request, a warning will be displayed. To continue working on a draft Note, open the request in Edit mode and select the Note No. hyperlink.

No.	Date	Note	By	Public	Status	Minutes
12	01/12/16 11:43	---- Initial Description ---- Please enroll my name in the E-Learning Portal. Name ...	Sankar R			0

1 - 1 of 1 Results

Changing the Status of a Note

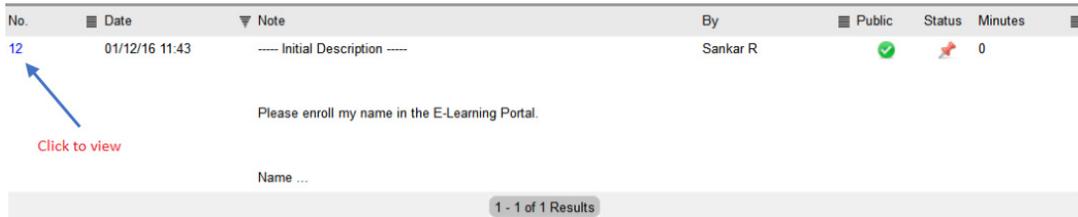
- When the Note is created, it can be either public or private. After the Note is saved, it is possible to switch visibility
- If a Note is marked Private, a padlock graphic is visible. To change the status to Public, click  to display 
- To change the Public Note to Private, click  to display .

Viewing a Note

An asterisk is visible on the Notes tab when the Technician assigned to the Request is yet to view a Note added to the Request.

To view a Note:

1. Select an Incident ID Number
2. Select the Notes tab
3. Click on the Incident Note Number hyperlink.



No.	Date	Note	By	Public	Status	Minutes
12	01/12/16 11:43	--- Initial Description --- Please enroll my name in the E-Learning Portal.	Sankar R	<input checked="" type="checkbox"/>		0

Click to view

Name ...

1 - 1 of 1 Results

When Notes are viewed without opening the Request in Edit mode by clicking the Note No. link, the User can scroll through the Notes list by selecting   inside the top right corner of the Notes window.

Replying to a Note



To reply via email to a Customer Note:

1. Click the required Incident ID number.
The Change Information screen appears.
2. Select Edit
3. Select Notes tab
4. Click on the Note number
The Note appears.
5. Click Reply
The new Notes editor is opened and includes the Note that is being responded to.
6. Enter the Note content
7. Adjust the Visibility and Recipients settings, accordingly
8. Select Add Note to send the Note, or click Draft to finish the Note later.

Emailing Saved RFC Notes



To email a Customer after a Note has been saved:

1. Click the required RFC ID number
The Change Information screen appears.
2. Select Notes tab

3. Click on the Note number

The Note is displayed.

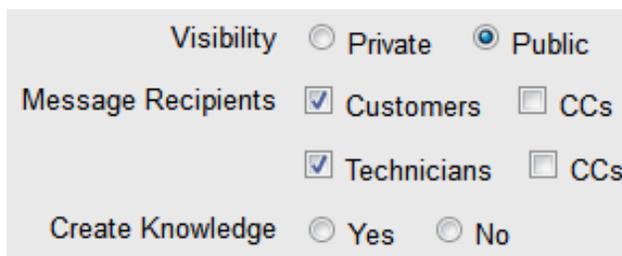
4. Click Email to send the Note to the Customer and any other Users added to the Notification list.

Adding Notes to Groups

When a Note is created for a Request that belongs to a Group, the Apply to Group option is visible within the Notes tab. If the new Note is to be assigned to all requests within the Group, select the Apply to Group option.

NOTE: Any new requests added to the Group at a later date will also have all pre-existing Notes, with this option selected, applied to the newly grouped request.

When the Apply to Group option is selected, the Add Note Time to Group option is displayed. Select this checkbox to also apply the Note Time to each of the requests.



The screenshot shows a configuration panel with the following options:

- Visibility:** Radio buttons for Private and Public.
- Message Recipients:** Checkboxes for Customers and CCs.
- Message Recipients:** Checkboxes for Technicians and CCs.
- Create Knowledge:** Radio buttons for Yes and No.

Selecting the Apply to Group option and then clicking the Solution button, closes all requests within the Group.

Attachments Tab

- ◆ [“Attachments” on page 436](#)
- ◆ [“Adding an Attachment” on page 436](#)
- ◆ [“Deleting an Attachment” on page 437](#)

Attachments

All Users can attach any type of file to an RFC.

Adding an Attachment

To add an Attachment:

1. Select an RFC number ID
2. Click Edit
3. Select the Attachment tab
4. Click

New

5. Browse and select a file
6. Mark Private, if the attachment is not to be available on the Customer Portal
7. Enter a file description, if necessary
8. Select to upload the file or to cancel the process.

The Attachment is automatically date stamped and shown as a File Name link with its file size. To open an Attachment, select the file name hyperlink.

File Description	Size	Date	Share
<input type="checkbox"/> Penguins.jpg	760 KB	01/12/16 15:14	<input type="checkbox"/>
<input type="checkbox"/> Desert.jpg	826 KB	01/12/16 15:14	<input type="checkbox"/>

NOTE: Requests that are part of a Group and have attachments uploaded within the Group Details Screen display  within the Share Column.

Deleting an Attachment

To delete an Attachment, select the checkbox beside the File Description then click Delete. The addition or removal of Attachments is recorded within the Audit Trail of the Change Request.

Impact Tab

- ◆ [“Impact” on page 437](#)
- ◆ [“Service Targets” on page 438](#)
- ◆ [“Service Level Breaches” on page 438](#)
- ◆ [“Services Affected” on page 439](#)
- ◆ [“Estimates” on page 440](#)
- ◆ [“Planned Outages” on page 440](#)
- ◆ [“Contract Monitor” on page 441](#)

Impact

The Impact tab provides the capability to measure the progress of an RFC relative to agreed Service Level targets and Workflow time estimates. It also includes a quick reference for identifying other Services or Items affected by the RFC. This tab displays a summary of the following:

- ◆ Service targets
- ◆ Workflow estimates
- ◆ The impact of the current RFC on related infrastructure.

The drop-down filter options within the Impact tab include:

Options	Description
Service Targets	Displays the target response, restoration and resolution times based on the Service Level Agreement/OLA assigned to the RFC.
Service Level Breaches	Displays service level breaches that have occurred and allows Users to assign a breach code and explanation for the breach.
Services Affected	Displays the Service Item Number, the Service SLA and number of Affected Users for any Services related to the Item associated with the Request.
Estimates	Provides a summary of the time estimated for each state of the Workflow based on the OLA assigned to the RFC. This can also be manually completed inside the Request.
Planned Outages	Provides a list of all the Planned Outages for the Item assigned to the RFC.
Contract Monitor	If the current Change Workflow State is assigned an Underpinning Contract or OLA, a table is displayed outlining the response, restoration and resolution milestones. When a milestone is met, the User is required to check the relevant checkbox. The application will automatically calculate the actual time accrued to achieve the milestone. The value displayed here is used for the Contract reports.
Purchases	When Purchase Orders are enabled in the system, any Purchase Orders associated with Items assigned to the Request are accessible through this option.

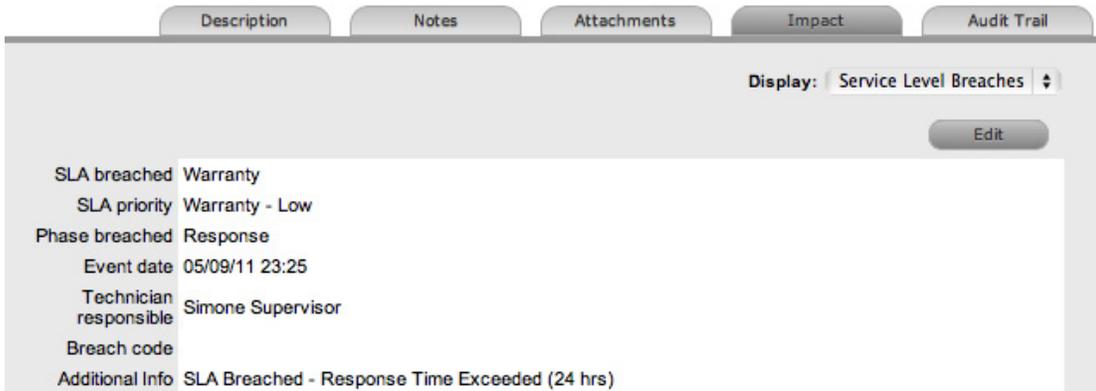
Service Targets

The details displayed here are drawn from the Service Level assigned to the RFC. These include the target Response, Restoration and Resolution times for an RFC, based on the Priority assigned. If an Underpinning Contract or OLA has been assigned to the RFC's current State then the targets for that contract will also be listed.

Problem Information						
Customer	Contract	Analysis	Summary	Notes	Attachments [2]	Impact
						Display: Service Targets
Name	Priority	Response Time	Restoration Time	Resolution Time	24 x 7 support	
SLA	SLA	Medium	18 Hours	36 Hours	72 Hours	Yes

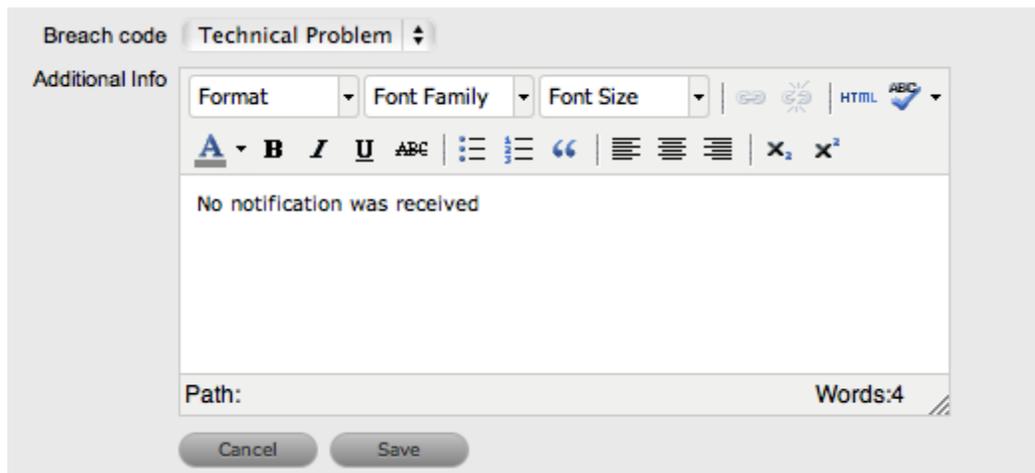
Service Level Breaches

When an RFC Service Level Agreement is violated, a service level breach is recorded against the RFC. The User assigned to the request will be notified and asked to provide a reason for the breach, and assign a Breach Code.



To assign a Breach Code:

1. Click the RFC number
2. Click Edit
3. Select Impact > Service Level Breaches
4. Click Edit
5. Assign a Breach Code
(The available codes are created by the Supervisor within the Service tab)
6. Add any additional information, if required



7. Click Save.

All breach information is used for reporting on Service Level Agreements.

Services Affected

When the request is logged against an Item that is associated with Services within the Item Relationships tab, the Services Affected option displays the Service Item Number, the Service SLA and number of Affected Users.

Estimates

The Estimates option allows Users to view an indication of the approximate time a Change Request should remain in each State of the Change Workflow, the amount of time logged in each State and the length of time the RFC resided in each State.

Options	Description
Estimate	Indicates the approximate length of time the Request will spend in the Workflow State. This field is automatically completed if an OLA or UC is assigned to the Workflow State.
Logged	Is a combination of time accrued against the Request when in edit mode with the automatic timers enabled, and the sum total of Note Times manually entered by Users.
Total	The total time a Request has resided in the Workflow State.
% Active	The percentage of the Total time that the Request was actively worked on when in the State. The calculation is, (Logged time divided by Total time) x 100.

The Estimate Times are drawn from the OLA and Underpinning Contract assigned to the current State. However, these can also be adjusted manually for each RFC. To manually adjust the estimated time for a Workflow State:

1. Select a Request number ID
2. Click Edit
3. Move to the Impact tab, select Estimates from the drop-down list
4. Select the State hyperlink within the Status column of the Estimate Time to be adjusted
An editor box is displayed.
5. Enter the adjusted time in the available field
6. Click Save within the editor box
7. Make any other time adjustments, if required
8. Select Save to record all manually entered time adjustments against the Change Request.

Status	Workflow	Estimate (mins)	Logged	Duration	% Active
Open	Problem Workflow	0	0	0	0%
Open - Restored	Problem Workflow	0	0	0	0%
Pending	Problem Workflow	0	0	20 Hours 27 Mins	0%
On Hold	Problem Workflow	0	0	0	0%
On Hold - Client Action	Problem Workflow	0	0	0	0%

1 - 5 of 6 Results

Planned Outages

Planned Outages can be created and linked to the RFC. The Planned Outages are used as an indicator for the preferred time that a change to an Item should take place.

Creating an Implementation Outage:

1. Select an RFC number ID
2. Click Edit
3. Move to the Impact tab, select Planned Outages from the drop-down list
The Implementation editor appears.



4. Click New to create an Outage or Click Link to access the Planned Outage information recorded within the Item Details tab
5. Enter Outage information
6. Define Notification and Reminder Email requirements



7. Click Save.
The Outage is assigned to the RFC.

Contract Monitor

When a Workflow State with an OLA or Underpinning Contract is assigned to the Request, the Contract Monitor displays the details of the Contract.

The information is used for reporting purposes and includes:

Details	Description
Contract Type	Specifies if the Contract Type is an OLA or Underpinning Contract.
Start Time	Auto-generated time the request moved to the current Workflow State.
Milestones	
Expected Response Time	Response Time calculated using the Contract target parameters.
Responded	Actual Response Time auto-calculated when the User checks the box.
Expected Restoration Time	Restoration Time calculated using the Contract target parameters.
Restored	Actual Restoration Time auto-calculated when the User checks the box.
Expected Resolution Time	Resolution Time calculated using the Contract target parameters.
Resolved	Actual Resolution Time auto-calculated when the User checks the box
Comments	Allows for additional comments, if required.

Details	
Underpinning Contract	Canton Services
Start Time	05/11/11 21:21
Milestones	
Expected Response Time	05/12/11 21:21 ← Breached Response Time
Responded	<input type="checkbox"/>
Expected Restoration Time	05/13/11 21:21
Restored	<input type="checkbox"/> ← Check when the Service Provider meets the Restoration or ResolutionTime
Expected Resolution Time	05/15/11 21:21
Resolved	<input type="checkbox"/> ←
Comments	<div style="border: 1px solid blue; height: 100px;"></div>

NOTE: If Milestones are breached the Response, Restoration and Resolution times are assigned a red marking.

Audit Tab

- ◆ “Audit” on page 442
- ◆ “Audit Trail” on page 443
- ◆ “Resource Utilization” on page 443
- ◆ “Item Audit Trail” on page 443
- ◆ “Request Approvals” on page 443
- ◆ “Service Terms” on page 443
- ◆ “Time Recorded” on page 445

Audit

The Audit tab lists all activities that occur within the lifetime of an RFC, the resources used, and the history of the RFC's Item. It provides access to information relating to Approval activities logged against the RFC.

Customer		Contract		Analysis		Summary		Notes		Attachments		Impact	
Audit Trail													
No.	Date	Event	By	Display:									
132	01/13/16 11:25	Item has been added to outage 4	Sankar R	Request Approvals									
115	01/11/16 10:22	Monthly Cost set to '0' Delegate Costs changed fro...	Sankar R	Audit Trail									
114	01/11/16 10:19	Item created whilst creating new task.	Sankar R	Resource Utilization									
				Item Audit Trail									
				Request Approvals									
1 - 3 of 3 Results													

Audit Trail

The Audit Trail option records all activities related to an RFC. The recorded activity, which can be exported to PDF includes:

- ◆ Date and time the RFC was assigned and/or reassigned to Users
- ◆ When the RFC moved to a new state, or had its Priority or Due Date changed
- ◆ Details of Notes added
- ◆ Attachments activity
- ◆ Classification change
- ◆ Logged time.

Resource Utilization

The Resource Utilization option displays a breakdown of the time an RFC was worked on at each level of support. It details the User's name, the escalation layer they belong to and the amount of time they spent on the RFC.

Item Audit Trail

The history of the Item associated with the RFC is detailed within Item Audit Trail. To access more information regarding an Item Audit Trail entry, select the ID number hyperlink.

Request Approvals

For RFCs that are assigned an Approval State, the details, including the time and date the RFC entered and exited the Approval State, are recorded within this tab. Select the Date hyperlink to view the Approval Action information. The complete list and details can be exported using the PDF option.



Service Terms

The Service Terms sidebar displays the Service Level Agreement (SLA) assigned to the RFC and provides details of key dates.

Service Terms

Service	
Agreement	SLA
Service Desk	Joe
Progress	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">Paused </div>
Open Date	
Due Date	01/15/16 16:59
FSC Date	<input style="width: 80%;" type="text"/>
Last Action	01/12/16 16:59
Time Recorded	
Affects	11 Users

By default the application calculates the Due Date based on the Priority of the SLA assigned to the Customer, Organizational Unit or Item. The email reminders and escalations are then managed accordingly. If an SLA is not associated with the Request via the Customer, Org Unit or Item, the system default SLA will be automatically assigned to the Request but can be manually adjusted by the Technician. Once the Workflow is moved from the default Open State, the SLA can no longer be edited.

Service Terms

Agreement	<p>Displays the Service Level Agreement assigned to the Request. The service level is derived from either the Customer, Organizational Unit or Item.</p> <p>When Contracts are not enabled, the Agreement field can be edited when the RFC is in edit mode.</p>
Service Manager	<p>Displays the User assigned as the Service Manager for the assigned SLA.</p>
Progress	<p>Visually displays how the Change Request is tracking against the assigned SLA. The grey progress bar is gradually filled in based on the status of the SLA:</p> <p>Paused - Workflow is in an SLA paused State. Triggers will not fire.</p> <p>26% - Workflow is in an SLA timers on State. Triggers will fire.</p> <p>Success - Workflow is in an Exit State and the SLA has been successfully maintained.</p> <p>Failed - Assigned SLA has been breached and Workflow is in an Exit State.</p>
Open Date	<p>The Open Date field is automatically populated when the Change Request is created.</p>
Due Date	<p>By default the application calculates the Due Date based on the SLA Target for the Priority assigned to the Request, and email reminders are sent accordingly.</p>
FSC Date	<p>The Forward Schedule Change date is automatically updated by the system when a Planned Outage is created within the Impact tab. The Planned Outage and RFCs change due dates are also visible within the Home>Calendar tab.</p>
Fix Date	<p>Auto-filled when the Request moves into a Workflow State that is defined as meeting the SLA Resolution Time.</p>
Remaining	<p>Auto-filled and visible when there is SLA time remaining.</p>

Service Terms

Time Overdue	Auto-filled and visible when the SLA is overdue.
Close Date	Auto-filled when the Status of a Change Request is set to Closed. This date is fixed.
Resolution Time	Auto-filled with the number of minutes it took for the request to move from the first SLA active State to a Workflow State that is defined as meeting the SLA Resolution Time.
Last Action Date	Auto-filled when Done or Save is selected after the Change Request has been modified or opened in edit mode. As updates may be made to a Request after it has been Closed, this date may fall after the Close Date.
Time Recorded	Displays the sum total of automatically logged time, when the Change Request is in edit mode plus any manually entered Note Times.
Affects	Number of Customers assigned to the Item associated with the RFC.

NOTE: Each User can customize the date format within the My Account sub-menu option. To change the date format go to Home > My Account, click Edit and select the preferred format.

Time Recorded

Time Recorded uses a combination of auto-timing and manual Note Time entries to measure and monitor the time spent working on an RFC.

The Auto-timer is activated when a Change Request is opened in edit mode, if enabled by the Administrator in the Admin>Setup>Privileges>User>Manual Incident Time. When the Request is saved after any amendments have been made, the timer stops and records the length of time the Request has been worked on. This total is added to the sum total of any manual Note Time entries made by Technicians when they are adding Notes.

The Time Recorded is used by the system when the Contracts functionality is in use.

Related Requests

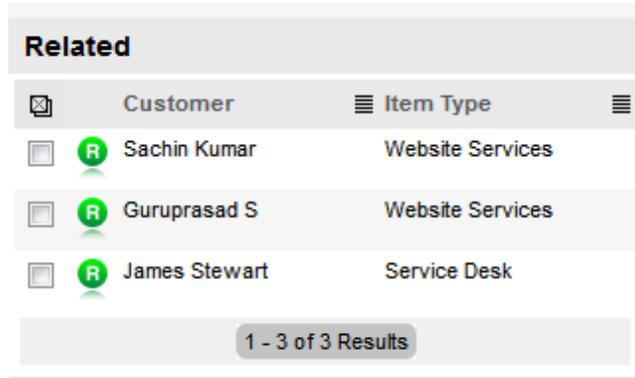
- ◆ [“Managing Related Requests” on page 446](#)
- ◆ [“Bulk Updates” on page 446](#)
- ◆ [“Remove Related Requests” on page 447](#)

The Related Requests sidebar is automatically displayed when a Change Request is linked to other Requests.

RFCs can be linked in the following ways:

- ◆ Using the Group option within the RFC list
- ◆ Using the Change Group feature under the Change tab
- ◆ Linking requests within the RFC's Analysis tab

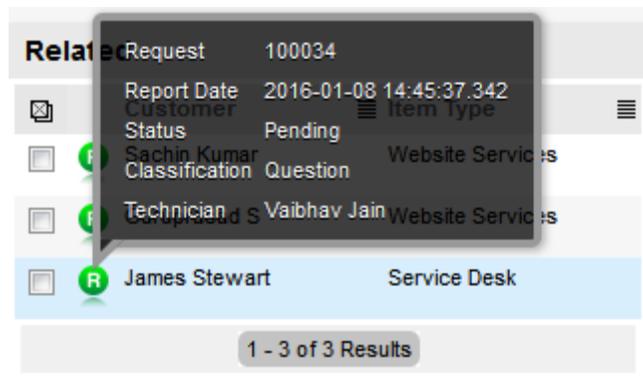
- ◆ A result of multi-Item Request creation.



Any Requests that belong to a Group can be viewed within the Related sidebar window, inside the Change Information screen. Within this window, all related Requests are listed and can be controlled as one. For example, Notes can be applied to all related Requests, or the entire Group can be closed.

Managing Related Requests

The details of a Related Request can be viewed by hovering the mouse over the colored Icon. Click on the same Icon and the system moves to the Change Information screen of that related Request.



Bulk Updates

The Bulk option allows one or more related Requests to have the following information updated simultaneously:

- ◆ Priority, Workflow, Status, Team, Escalation Layer & Technician
- ◆ Notification method and recipients
- ◆ Request Classification
- ◆ Items
- ◆ Description, Attachments and Notes.

To bulk update for any of the above elements:

1. Select Change>Change Requests
2. Click on the Request # link of the relevant Grouped Request
3. Tick the checkboxes of the appropriate requests in the Related sidebar that are to be updated
4. Select

Bulk

The system displays the Bulk Editor screen.

NOTE: The system does not allow Requests with a status of Pending-No Contract to be updated. If the Bulk update is only associated with Requests of this Status, an error message is displayed.

5. Amend the appropriate element as per the above list
6. Click Save.

Remove Related Requests

To remove a request from a Group:

1. Go to Change>Change Requests
Or, within Change>Change Groups select the Group # link and move to the Elements tab
2. Click on the Request # hyperlink of a Grouped Request
3. Click

Edit

The RFC opens in Edit mode and checkboxes become available next to the requests in the Related sidebar.

4. Tick the checkboxes of the requests to be removed
5. Select **Unlink**.

The marked requests are removed from the Group.

Closing Requests within Groups

Requests within the Related sidebar can be closed individually by moving the Workflow State to a Closed State within the Change Information Screen. Grouped Requests can also be closed as a group, by changing the Request Status to an Exit State as part of a Bulk update. (See Bulk Updates above.)

The screenshot shows the 'Editing Multiple Requests' interface. It has four tabs: Customer, Contract, Analysis, and Summary. The 'Contract' tab is active. On the left, there are sections for 'Details', 'Team', 'Notification', 'Customer', 'Customer CCs', 'Technician', and 'Technician CCs'. The 'Status' dropdown menu is open, showing options: Cancelled, Cancelled - Unpaid, Closed - Resolved (highlighted), Closed - Restored, On Hold, On Hold - Client Action, On Hold - Pending Approval, On Hold - Process Escalated, Open, Open - Restored, Pending, and Pending - No Contract. On the right, there are 'Classifications' and 'Item' sections. The 'Classifications' section shows 'Iphone 6' and 'Account Details'. The 'Item' section shows 'Vamsi Krishna (100026)' and 'Electrical Engg'.

Status

Change Request Workflows are a combination of any number of stages or States that cover the lifecycle of a Change Request. A Supervisor creates new Change States for the default Change Workflows or builds new Workflows in the Service >Workflows tab.

Within the Change Request Information Summary page, the assigned stage of the Workflow is displayed within the Status field, with the Next Action field displaying the options of where the Request can move to. To view an assigned Workflow in its entirety select .

The system provides the following States for each Change Workflow:

Status	Description
SLA Timers On	
Open	The RFC is open. Request timers are running and the automated SLA reminders, warnings and escalations will fire relative to the Triggers configured for the SLA.
Pending	Work on the RFC has not commenced. The Response-time SLA trigger will fire for RFC's with this Status.
SLA Timers Off	
On Hold	The RFC has been put On Hold for some reason. SLA triggers will not fire for RFC's with this Status.
Closed (Verified)- CAB	RFC has been resolved and verified by the CAB.
Closed Resolved	The issue has been resolved and the RFC has been closed. SLA triggers will not fire for RFCs with this Status.
Cancelled	The RFC has been cancelled. SLA triggers will not fire for RFCs with this Status.
Cancelled- Unpaid*	The contract for a RFC has not been paid. The RFC is cancelled.
Pending- No Contract*	RFC has been created without a Contract. The Contract must be processed before work on the RFC can commence .
Pending- CAB	Work on the RFC has not commenced, and the RFC is pending approval from the CAB.
Rejected- CAB	The RFC has been rejected by the CAB.

*Denote System States that cannot be deleted.

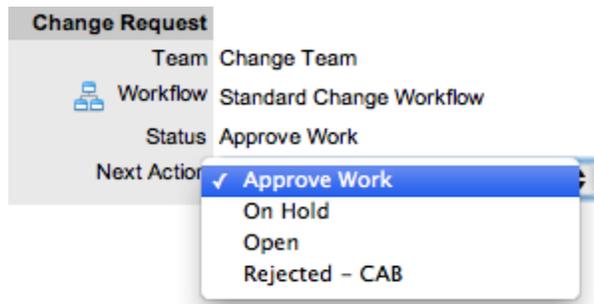
NOTE: When an RFC is created, it is automatically assigned the Pending-CAB status. The CAB defines the Workflow the RFC follows, which in turn determines the Statuses available for the RFC.

Updating a Request's Workflow and Status

To manually change an RFC's Workflow or Status:

1. Select Change > Change Requests
2. Select a Request #
3. Click Edit
4. Within the Workflow list, modify the Workflow as required
5. From the Next Action drop-down list select the RFC's next Status.

The States listed in Next Action are based on the Change Workflow selected. To view the complete Workflow lifecycle click .



6. Click Save.

The system can automatically move an RFC to a Pending CAB Status through the following actions:

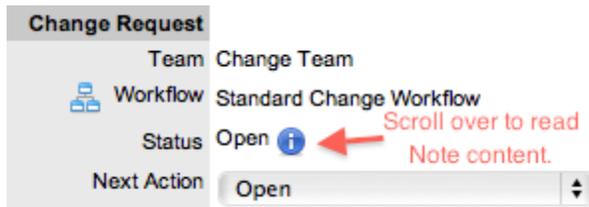
- ◆ When Billing is enabled and payment is not received
- ◆ When SLA parameters are violated.

Requests with a Pending-No Contract Status

Requests logged with the system that do not have a valid Contract are assigned the Pending - No Contract status. These requests are locked until a valid Contract is applied, and if relevant, paid.

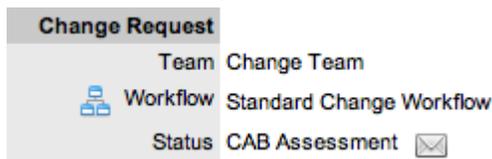
Viewing a Status Note

When Requests move into a State with a Status Note,  is displayed beside the Status field within the Summary tab of the Request. Scroll over  to view the contents of the Status Note. If the Status Note includes an attachment, click the displayed link in the pop-up window to download it.



Request Reminders

When Change Requests move into a Customer, Line Manager or Team Manager Approval State, Technicians who are part of the Change Team have access to the Send a Reminder option within the Summary tab. Clicking  sends a reminder email to the Manager or Customer, depending on the type of approval required, and records the action in the Request's Audit tab. (The message is customized by the Administrator in the Setup>Email>Templates, Approve Service Request link.)



SLA Triggers and Request Status

SLA Triggers fire for Requests that are in a Workflow State that has the Service Timer Active option set to Yes. The default Timer Active set for systems States can be changed if relevant for the organization. For example, it may not be appropriate for an organization to have SLA Triggers fire when a Request is moved to the system default "On Hold" State.

The following icons displayed in the Service Terms box, visually indicate how the Request is tracking against the SLA and if the SLA timers are active:

Current SLA Status

	Workflow is in an SLA paused State. Triggers will not fire.
	Workflow is in an SLA timers on State. Triggers will fire.
	Workflow is in an Exit State and the SLA has been successfully met.
	Assigned SLA has been breached and Workflow is in an Exit State.

Supervisor Users can verify the Timer Active status of a Workflow by scrolling over the Status in the Workflow map available in the Summary Information screen, or within the Service>Workflows>selected Workflow> Lifecycle>selected Status screen.

Service	
SLA Active	<input checked="" type="radio"/> Yes <input type="radio"/> No
SLA Restoration	<input type="radio"/> Yes <input checked="" type="radio"/> No
SLA Resolution	<input type="radio"/> Yes <input checked="" type="radio"/> No

Priority

The Priority determines the timeframe in which a Request should be handled and sets the service level targets adopted by the Request that drive the SLA triggers and actions. It represents the degree of importance of the service request to the Customer and also indicates the urgency of the Change Request to the Technician.

A Request for change can have one of four possible Priorities:

- ◆ Urgent
- ◆ High
- ◆ Medium
- ◆ Low.

Setting RFC Priority

The Administrator configures the options for determining the Priority within the Setup>Privileges>Request tab. The Priority options include:

- ◆ Selected Priority - where the system configured default Priority is applied to the Request but can be manually adjusted by the User.
- ◆ Derived Priority - where the Impact is derived from the Item Criticality and the User enters the Urgency, enabling the system to calculate the Priority.

Urgency: The value selected reflects how quickly a resolution is required.

Impact: The value selected indicates the impact the Request has on the User and Organization. The higher the Impact the higher the Priority to resolve the Request.

If the Administrator has set the Request Priority option to Derived, the Priority of a Request results from the Impact being mapped from the Criticality of the Item and then combined with the selected 'Urgency'. However, if required, the Impact can be manually adjusted within the Request Information screen to affect the Priority.

The following table displays the calculations applied by the system using the Item Criticality mapped directly to the RFC Impact, to determine a Request's Priority:

Impact / Urgency	Urgent	High	Moderate	Low	Very Low
Critical	1.000	0.850	0.700	0.550	0.410
High	0.850	0.723	0.595	0.468	0.349
Moderate	0.700	0.595	0.490	0.385	0.287
Low	0.550	0.468	0.385	0.303	0.226
Very Low	0.410	0.349	0.287	0.226	0.168

The above calculations result in the following Priorities:

Priority	Upper	Lower
Urgent	1	0.83
High	0.83	0.58
Medium	0.58	0.34
Low	0.34	0

RFC Assignment and Escalation

When a Change Request (RFC) is logged within the system, it is allocated to the Team that is associated with the SLA and Workflows used by the RFC or to the default Team assigned to a Workflow State. The RFC Status is automatically set to the default Entry State of the Workflow.

The appropriate Change Request Workflow is assigned within the Change Request Summary tab, by selecting an option from the Workflows drop-down list. This list is derived from the SLA assigned to the Customer, Organizational Unit and Item. Once the Workflow is selected, the associated Teams are available for assignment. Based on the Team assigned, a Technician in the Group associated with the first State of the selected Workflow is allocated to work on the RFC. This can be adjusted manually, if required. As the RFC moves through the Workflow, it is allocated to an Assigned Technician within the Group associated with the assigned State.

Note, that if the Technician assigned to the RFC is also included in the Group associated with the next Workflow State, the system will by default reassign the RFC to the same Technician when it moves to that next State.

It should also be noted that for each Change Request Team, there is an over-arching layer of escalation above the Technicians assigned to each Workflow State. This means that throughout the Workflow Lifecycle, in addition to changing the Technician by moving Workflow States, the RFC can be escalated to a higher level of support if required.

The Request is automatically escalated according to the SLA assigned to the RFC and the triggers configured within the Priority of the SLA. An RFC is escalated if the assigned User exceeds the Escalation trigger point defined for the Response, Restoration or Resolution time of the assigned SLA, when the assigned Workflow State is an SLA Active State. Or, it can be manually escalated by a User, if required.

RFC Assignment

When an RFC is assigned to a User, the system follows a series of steps to look for the most appropriate Technician for the job, based on skill set, location and workload. The order of business logic is as follows:

1. The system will identify the Team associated with the Service Request's SLA and associated Workflows
2. The system will find Technicians/Supervisors assigned to the Team
3. If Users are assigned to an Organizational Unit, the system will identify the Users that belong to the same Organizational Unit as associated with the Request by the Customer assignment
4. If Classifications/Skills are assigned to Users, the system will find Technicians/Supervisors assigned to the Request's selected Classification
5. Based on the Team configuration, if the Live Priority option is enabled for the Team, the system will look for a User who is logged into the system
6. The system verifies Work Hours/Availability of Users within the Team for appropriate Request assignment
7. The system will assign the Request to the User who has the lowest workload, i.e., the fewest number of Open or Pending Requests
8. If there is a tie, the system randomly allocates the Request to a User in the tie.

If a more appropriate Team member is available, the User assigned to the RFC can re-assign it manually by selecting a Technician from the drop-down Technician list in the Change Information screen.

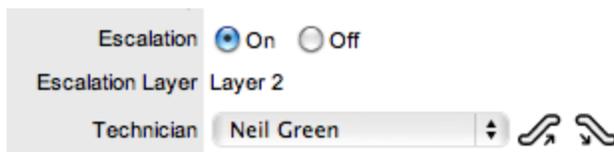
Note, if the Self Assign option is enabled for the Team, the system assignment logic is ignored and the User creating the request is automatically assigned the RFC.

Automated Escalation

An RFC's Service Level Agreement includes trigger points that set the rate at which automated escalations will occur for an RFC. Auto-escalation is triggered when the number of support hours specified for either an RFC's Service Level Response, Restoration or Resolution time is exceeded and the SLA Trigger action is set to Escalate. When it is escalated, the RFC is assigned to a Technician or Supervisor in the over-arching escalation layer for the assigned Change Team.

Manual Escalation

The Escalate button next to the Technician name in the Change Request Information Summary Screen, escalates the RFC to an over-arching escalation layer for the Change Team. Any Technician assigned within the escalation layer can be assigned to the RFC.



Escalation Control

If the Escalation Control functionality is enabled in Admin>Setup>Privileges>Requests, there is the option to enable or disable escalation within the Change Request Information Summary screen.

NOTE: This option is only visible to Supervisor Users. Once an RFC is created, a Supervisor can elect to switch the Escalation option to Off. This means all SLA timers stop, which prevents escalation. Switching the option back to On will re-start the timer and reactivate the SLA triggers.

Notification

The Notify option sets the method of messaging used by the application to notify Customers and Technicians of the following changes to an RFC:

- ♦ RFC is created
- ♦ RFC is closed
- ♦ RFC is deleted
- ♦ RFC Note is added
- ♦ RFC is escalated (Technician only).

The default notification status of Requests is set on a per Team basis within the Users>Teams>Team Information screen, with the default recipients of new Notes being configured by the Administrator in the Setup>Email>Setup tab. However, this can be adjusted on a per Request basis within the Notification Method field and on a per Note basis, when new Notes are created.

The methods of Notification can be set for Customers and Technicians, and include:

- ♦ None, which ensures that no messages are sent
- ♦ Email, which means an email is sent containing the Change Request detail updates
- ♦ SMS notifications, which sends an SMS message to Technicians and Customers about the RFC update. This is only available to Users and Customers who have a mobile number and a service provider entered in their User and Customer Information screen.

Notifications can be sent to:

- ♦ Customer- the Customer who logged the RFC
- ♦ All Owners - all Customers who share the Item assigned to the RFC
- ♦ Customer CC's - email addresses to receive Customer email correspondence when the CC field is selected in the New Notes screen

This field is automatically populated by the system with email addresses included in the CC list of the original email used to create the Request. Multiple addresses should be separated by a comma.

- ♦ Team - notifications can be sent to all members within the Team assigned to the RFC, or restricted to members within the layer of escalation to which the Request is assigned

- Technician CC's - enter any User account email addresses that are to be sent Request Notifications. Multiple addresses should be separated by a comma
- Alternate Team - this option is visible if the Notify Alternate Team option is enabled in the Admin>Email>Setup tab. Notifications can be sent to a Team within the related Process, by the User selecting an option within the drop-down list.

The following is a sample email sent by the system to the Customer and assigned Technician, confirming the creation of a request. The message sent can be customized by the system Administrator:

Email Sample

Thank you for contacting our support department.

Your problem has been received and allocated to a technician. You will be notified via email of the progress, or you may login to our support site at any time to check the status of your incident.

Incident Information	
Incident #:	100053
Date Opened:	08/18/06 15:24 (mm/dd/yy hh:mm)
Classification:	Printing
Technician:	Supervisor User
Item #:	100005
Item Type:	word
Identifier:	
Customer:	Bob Samson
Company:	Sales
Due Date:	08/21/06 15:24
Description:	Whenever I try to print in Word, nothing happens.

Workflow

When a Change Request is created it is assigned a Workflow that governs the life-cycle of the Change Request. The SLA allocated to the RFC determines the Workflow options made available for the Change Request. Before saving the RFC, the User can adjust the system assigned Workflow, if more than one Workflow option is available.

After the Workflow is assigned to the Change Request, all stages of the assigned Workflow can be viewed by selecting . The Workflow map displays the entry points (blue boxes), transitional States (orange boxes) and exit points (red boxes).

The User moves the Request through the Workflow Lifecycle by adjusting the options displayed in the Next Action field.

Moving through the Workflow

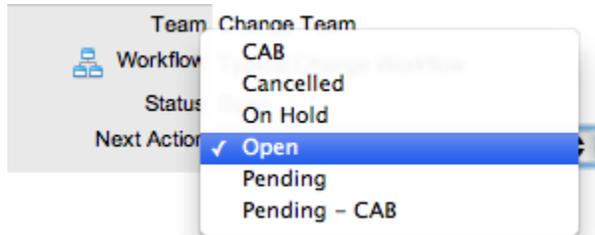
To move a Change Request through the stages of the Workflow, in the Summary tab of the Change Request Information screen:

1. Click Edit

The Next Action field with a drop down list of Status options is displayed below the Status field.

2. Click on the Next Action field

The Status options are displayed. This list is based on the configuration of the assigned Workflow.



3. Select a State
4. Click Save.

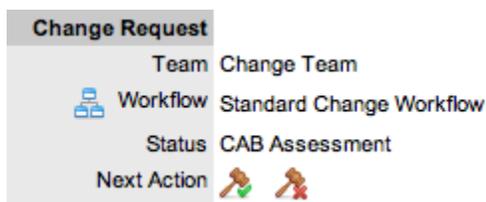
The selected Status is assigned to the Change Request with the updated logic applied (i.e., The SLA Timers may now be active or inactive based on the newly assigned State configuration or an alternative Work or Manager Group may have been assigned to the Request.

Approval State

Approval States in Change Request Workflows provide the facility to approve or reject Request activity to Manager Groups that have been assigned to the Approval State. When a Request moves into an Approval State, the Edit button is only visible to Manager Users within the Manager Group that is assigned to that stage of the Workflow. Users who are not Managers within the Team, can send Managers a reminder to action the Request, by selecting .



Managers who are assigned a Request for approval can  (approve) or  (reject) the Request, which automatically moves the Request to the next pre-configured stage of the Workflow. Requests assigned a Customer or Line Manager Approval State can be processed via the Customer Portal or email.



Assigning a State with an Underpinning Contract

Each state of a Workflow can be customized for either internal support contract management that is monitored by an OLA, or out-sourced to an external support provider, which is monitored by an Underpinning Contract.

When a Request moves into a State that is governed by an Underpinning Contract, for internal contract control the Request can be assigned to the Service Level Manager, if configured in the Workflow. This allows the Manager to maintain control of the RFC, and to easily follow up with the external service provider, if required. The assigned SLM will be able to adjust the current Status, add Notes and update the Contract Monitor information in the Impact tab.

Service Request Information

Customer Analysis Summary

Service Request # 100062

Details

- Title
- Customer Jason Blackett
- Item Number Email Service
- Type Email Services
- Classification Question
- Urgency Moderate
- Impact High
- Priority High

Assignments

- Escalation On Off
- Escalation Layer Layer 1
- Technician Craig Wilson (Service Level Manager)

Notification

- Customer Email Customer
- Customer CCs
- Technician Email Team
- Technician CCs

Service Request

- Custom 1
- Custom 2
- Custom 3
- Type Custom 1
- Type Custom 2
- Team Service Request Team
- Workflow Service Request Workflow
- Status Pending
- Status Due 3/20/16 14:50

Assigned to Service Level Manager because "Assign SLM" option set to "Yes" within the Outsourced State of the Workflow configured in the Service > Workflow tab.

Due date is calculated based on the Underpinning Contract assigned to the Workflow state

Alternatively, the Workflow State can be configured for the Technician assigned at the time the Request is moved to the Underpinning Contract State to maintain Request editing privileges and manage adherence to the assigned service agreement. If the Workflow is configured for the responsibility of the Request to be maintained by the Technician when the Request is in an external contract state the Technician will be able to adjust the current Status, add Notes and, if the Technician is assigned the Internal Process of Service Level Management amend the Contract Monitor information in the Impact tab.

OLA Status Due

Within the Summary screen, the Status Due field is visible when a Workflow status is monitored by an OLA. The time, date and percentage remaining information displayed is calculated using the OLA's Target Resolution time.

Change Request	
Team	Change Team
Workflow	Typical Change Workflow
Status	Outsourced
Status Due	09/29/09 20:42 (98% Remaining)

Team Assignment during the Workflow Lifecycle

To ensure that all Change Requests are managed throughout the Workflow, the Team assigned to the RFC when it is first logged within the system is set as the default Team. If a Request moves to a State that has an OLA assigned with a Team, the RFC is re-assigned to that OLA's Team. When the RFC moves out of the OLA State to a State where no OLA or Team is assigned, the RFC is re-assigned to the default Team.

Pending - No Contract Status

When the Contracts or Invoices functionality is enabled and a request is created, the system will verify the service entitlement status of the Customer and if a valid contract is not in place, the new RFC is assigned a Status of Pending-No Contract and locked until a valid contract is associated with the RFC.

In a Request Group where the Customer and Organizational Unit does not have a Contract, if an Item applied to an RFC has a Contract and another does not, a relevant Status will be applied to each request. The User will be able to edit the RFC with a valid Contract, but the RFC without a Contract will be locked down to a Pending - No Contract Status, until a valid Contract is applied to the RFC.

The screenshot shows the 'Item Information' interface for 'Item # 10000101 (Iphone 6)'. The 'Contract' section is active, displaying the following details: Service Level: SLA; Contract #: 16 (with a red 'X' icon); Contract Type: Subscription; Invoice #: 100039; Start Date: 01/12/16; End Date: 01/24/16; Expires: 11 Days. At the bottom of this section, 'Pending Contract # 17' is listed with an 'Enable' button. A red arrow points to this 'Enable' button.

The Customer is automatically sent the NoContractCreateRequestSummary email when the Request is saved with the Status. A reminder email can be sent by the Technician from within the Summary tab by clicking , when the RFC maintains this Workflow Status assignment.

The RFC report entered during the request creation is recorded within the Description tab. Amendments can be made to the RFC report if required, but it should be noted that an Audit Trail is *not* maintained for alterations made within this screen. Therefore, it is recommended that any RFC report amendments be entered as an RFC Note.

The screenshot shows the 'Description' tab of the software application. The 'Subject' field contains the text 'Details required'. The 'Description' field is a rich text editor with the text 'When will the service be available?'. The word count at the bottom right is 'Words: 6'.

The details recorded in the Subject field are displayed in scroll-over summaries throughout the application. For example, when a new Change Request is being entered for a Customer, a Recent Customer Requests list is displayed during the Change Request creation process for all Items the Customer owns either directly or via shared ownership. The Requests list includes a scroll-over

summary where Subject content is displayed, if the Subject is completed for a Change Request. Subject information can also be included within a column in the Changes List View, for a quick glance summary of a Change Request.

NOTE: The Administrator can set the Subject field to be required for Technicians and Customers within the Setup>Privileges>User and Setup>Privileges>Customer tabs, respectively.

2.5.2 Change Groups

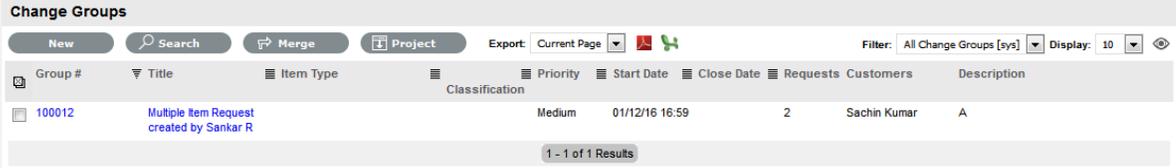
Change Requests that are related can be linked to form Groups. Once the Group has been created, RFCs can be managed as one.

For example, RFCs can be grouped if:

- ◆ They are all logged by Users of one department
- ◆ They are all logged by one Customer
- ◆ They are all logged for the same Configuration Item
- ◆ They have a common Description or Solution.

NOTE: New Groups must consist of RFCs that are not already linked, unless the merge facility is used to combine existing Groups..

Users can group Requests manually through the Change Groups tab or Change Request List. Change Requests that have multiple Items assigned to them during the Request creation process, are also listed within the Change Groups tab. The Change Groups list can be exported using the PDF, Excel and Project buttons.



Group #	Title	Item Type	Classification	Priority	Start Date	Close Date	Requests	Customers	Description
100012	Multiple Item Request created by Sankar R			Medium	01/12/16 16:59		2	Sachin Kumar	A

Creating a New Group via the Change Groups Tab

To create a new Group via the Change Groups Tab:

1. Select Change >Change Groups Tab
2. At the Change Groups screen, click New

3. Enter a Name for the Group
4. Assign an Item Type, if applicable
5. Assign a Classification, if an Item Type is selected
6. Assign a Group Priority
7. From the drop-down list, select a Status (i.e., Open, Closed or Resolved)
8. Enter a Group Description

The screen will default to the Analysis Tab, which allows the User to group existing RFCs.

Request #	IP	Created	Status	Priority	Item Type	Technician	Team	Customer	Group	Subject
<input type="checkbox"/>		01/13/16 14:27	Pending - No Contract	Medium	Iphone 6	Ingo Engels	Change Management Team	Vamsi Krishna	A1	
<input type="checkbox"/>		01/13/16 14:17	Pending - No Contract	Medium	Iphone 6	Ingo Engels	Change Management Team	Vamsi Krishna	A	
<input type="checkbox"/>		01/13/16 14:15	Pending - No Contract	Medium	Windows Bundle	Ingo Engels	Change Management Team	Sankar R		Change Request - Item has been marked for creation

9. Check the field next to the relevant Request # to add the RFC to the Group
10. Select Add
11. Click Done to record the new Change Group.

Creating a Change Group using a Group Template

To create a new group using a Group Template:

1. Select Change>Change Groups
2. Click New

New Group

Details Analysis Elements

New Group

Use Template [Dropdown]

Name | G1

Item Type

Classification

Status

Priority

Custom 1

Custom 2 |

Custom 3

Description |

Format | Font Family | Font Size | HTML

A B I U ABC | [List Icons] | [Quote Icon] | [Indent/Outdent Icons] | [Link/Unlink Icons]

Path: p Words:0

Cancel Next

3. Select the Use Template checkbox
A list of Group Templates will be displayed.
4. Select an appropriate Template
The Group details are listed.
5. Enter a Name, as unique identifier for this Group
The selected requests for the Group are displayed. These requests are the Quick Calls assigned to the Group Template.

New Group

Details Requests Analysis Elements

Use Template G1

Name | G1

Item Type Iphone 6

Classification General

Status Open

Priority Medium

Custom 1

Custom 2

Custom 3

Description |

Format Font Family Font Size HTML

A **B** *I* U ABC

Group 1 description.

Path: p Words:2

Cancel Next

6. Click Next

The Find Customer field is displayed.

New Group

Details Requests Analysis Elements

G1

Find Customer

First Name | | Email | |

Last Name | | Phone | |

Username | | Org. Unit | |

Supported Org. Units Only

Cancel Save

7. Search and select the Customer to be associated with the tasks included in the template

If the Customer details are not in the database and are to be created as part of the tasks included in the template, assign a default customer and update the details in the Customer tab of the Request, when the Customer details exist in the system.

8. Review the Selected Requests displayed for the Group

These Requests are the Quick Calls assigned to the Group Template. To exclude any of the Requests from the newly created Group, untick the checkbox next to the Template name.

New Group

Details Requests Analysis Elements G1

Customer

Name Sachin Kumar
 Email sachin@nsd.com
 Phone
 Address
 City
 State
 Zip
 Country

Selected Requests

	Order	Template	Status	Priority	Classification	Duration
<input checked="" type="checkbox"/>	1	G1	In Progress	Medium	Question	12
<input checked="" type="checkbox"/>	2	Qc1	In Progress	Medium	Question	12

1 - 2 of 2 Results

Creation On Save In Sequence

Details

Service Request Custom 1
 Service Request Custom 2
 Service Request Custom 3

9. Define the Creation option:

- ◆ On Save for all the requests to be created when the Request Group is saved
- ◆ In Sequence for the first request to be created when the Request Group is saved.

10. Click Save.

The Group is created including all requests.

The type of group created, whether it be an Incident, Problem or Change, will depend on the Quick Call Tasks assigned to the Group Template. For example:

- ◆ If there are Incident Quick Calls, the Group will become an Incident Group
- ◆ If there is at least one Problem Quick Call, the group will become a Problem Group
- ◆ If there is at least one Change Quick Call, the Group will become a Change Group.

Billing/Contracts

- ◆ [Contracts & Invoices](#)
- ◆ [Create an RFC](#)
- ◆ [Logged Time](#)

Item RFC

To monitor all changes made to the CMDB each time an Item is created, modified or deleted an RFC can be generated. To ensure an RFC is created each time an Item is updated, the Control CMS via RFC option must be enabled by the Administrator within Setup>Privileges>Requests tab.

When this option is enabled, when one of the following actions occur an RFC is generated:

- ◆ Create an Item
- ◆ Update the Item Type
- ◆ Update an Item Status
- ◆ Update an Item's Team
- ◆ Update fields within the Details tab
- ◆ Adjust Item costs
- ◆ Delete an Item.

The steps outlined below assume that the Control CMS via RFC option is enabled.

NOTE: Only Users assigned to the assigned RFC Workflow State can edit the RFC.

Creating an RFC for an Item

When an Item is created or modified an RFC is generated. To create an RFC for an Item change:

1. Select Configuration > Items
2. Click New to create an Item
3. Enter the Item details
4. Click Save

The system will inform the User that an RFC has been generated.



Information

The item was inserted successfully. The item has been raised as Change Request 100077. An invoice has been generated for this item. A contract must be generated before this item can be worked on.

Item Information

Information Details Costs Requests Relationships Outages AMIE Snapshots

 Print Item # 101011 (Windows Bundle)

Details

Bundle Name

Bundle GUID

Version #

License Key

License Count

Details

License Expiry

Ownership

Order #

Supplier

Supply Date

Description Notes Attachments Audit Trail

Description

Done

NOTE: The Item will not be visible within the Items List View until the RFC has been approved and applied

- To access the new RFC go to Change>Change Requests.

Change Request Information

Customer Contract Analysis Summary Notes Attachments Impact Audit Trail

 Add Note  Add Attachment Duplicate  Print Alerts Change Request # 100078

Details

Title

Customer Vamsi Krishna

Item Number 100026

Type Iphone 6

Classification General

Urgency Moderate

Impact Moderate

Priority Medium

Assignments

Escalation On Off

Escalation Layer Default Group

Technician Ingo Engels

Notification

Customer Email Customer

Customer CCs

Technician Email Technician

Technician CCs

Change Request

Team Change Management Team

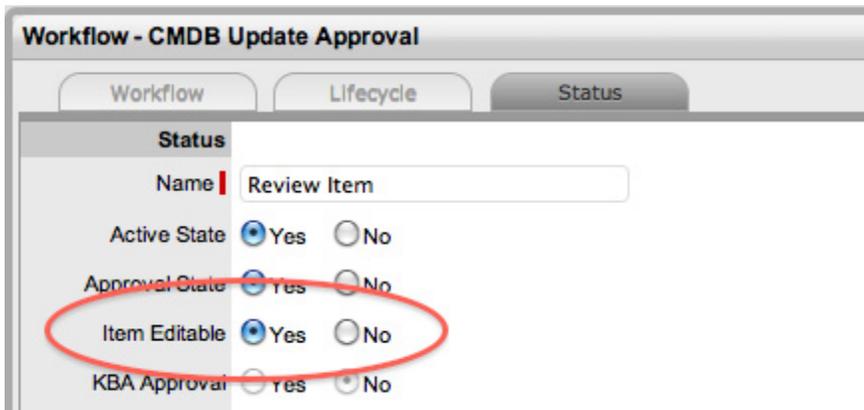
Workflow Standard Change Workflow

Status Pending - No Contract

Next Action Pending - No Contract

Working with the RFC to update the CMDB

The RFC that is automatically generated during the Item creation process, when the Control CMS via RFC option is enabled, includes the details of the Item creation or update in the RFC Description field. When the Change Request moves into a State that is defined as Item Editable, it allows the newly created or updated Item information to be applied to the CMDB. The Item Editable option is configured by a Supervisor in the relevant Workflow>Lifecycle>Status tab.



When the RFC moves into an Item Editable State, the Edit and Apply Item options are visible next to Item Type link.



The  option allows the Item update details that prompted the creation of the RFC to be applied to the CMDB. Scroll over  to view the Item details and refer to the RFC Description field for information regarding the Item change. The  option allows the Item details to be edited within the RFC before applying to the CMDB. When  is selected the Item Information screen is displayed in Edit mode, the details can be updated and when the Save button is selected, the changes are committed to the CMDB.

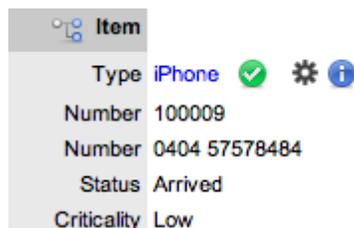
To update the CMDB by applying the newly created or edited Item details that prompted the creation of an RFC:

1. Go to Changes>Change Requests
2. Select the Change ID# of the RFC for the Item change
3. Click Edit

Refer to the RFC Description field for information about the Item that prompted the creation of the RFC.

4. Move the RFC to a State defined as Item Editable

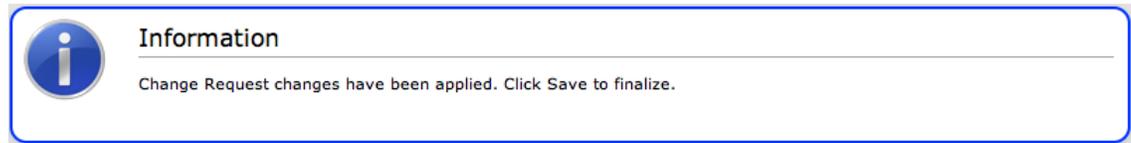
 is displayed next to the Item Type link, scroll over to view the details to be applied to the CMDB.



5. Click  to apply the Item information to the CMDB

Or, if the Item Details are to be edited, select , amend the information in the Item Information screen and click Save.

The Item Editor screen appears and the system prompts the User that the details described in the RFC have been applied and need to be approved.



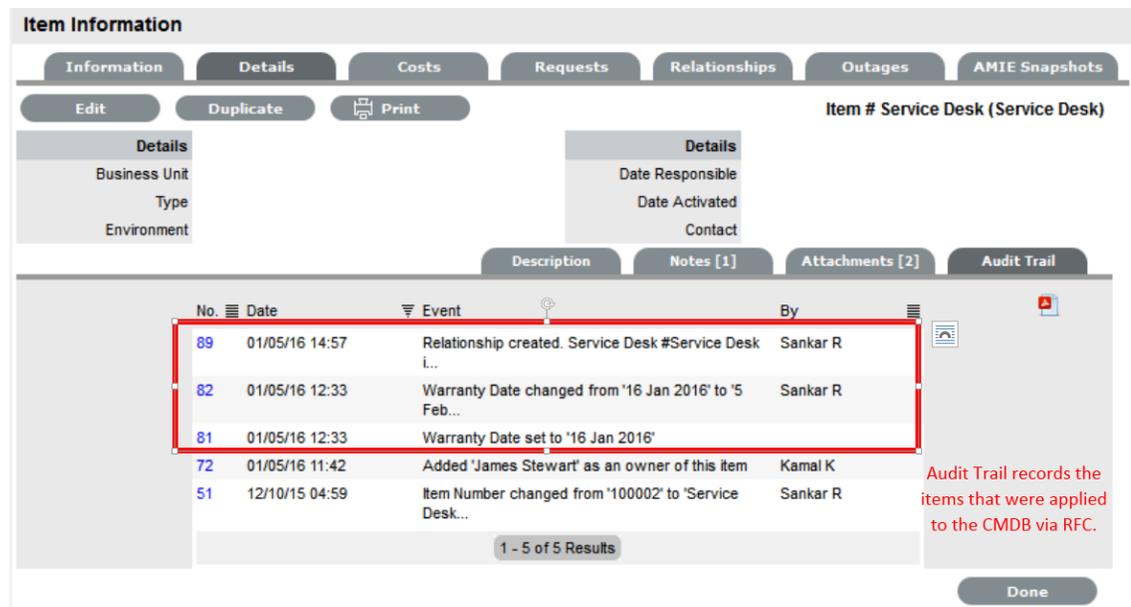
6. Click Save to apply changes

The Item is updated.

7. Save the RFC.

Move the RFC through the Workflow States to the Exit State, as configured.

NOTE: An Item's Audit Trail always records any RFCs created assigned with Item.



Creating an Item within an RFC

NOTE: The option to create an Item within an RFC is only available to RFC's created using a Group Template.

An RFC within a Group Template can be used to create a new Item. For example, a Group Template can include a Quick Call task to purchase a new piece of hardware. When the Group Template is applied, the RFC is created and assigned the Unknown Item. When the RFC moves into an Item Editable Workflow State, a New button appears next to the Unknown Item, which allows the User to define the new Item details.

To create a new Item within the RFC:

1. Go to Changes>Change Requests
2. Select the relevant Change ID# of the RFC to define the Item
3. Click Edit

To define the Item, the RFC must be in an Item Editable Workflow State to access the New button.

4. Click the , next to the Item Type 'Unknown'
The Item creation screen appears.

5. Define the Item details
Search and select the Item Type, click Next and enter any known information within the Item Details fields.
6. Click Save when completed

- The new Item is assigned to the RFC and created within the CMDB.
7. Click Apply to add the new Item details to the associated RFC
 8. Select the Summary tab to return to the RFC Information screen
Continue to work on the RFC as required.
 9. Click Save and Done.
The new Item and RFC updates are committed to the database.

Analysis Tab

RFCs can be linked to a Group in the Analysis screen of a Change Group. To search for Requests to add to the Group, use the system Filters or the Search option.

The system filter includes the following:

Unassigned Requests	Description
Project Requests	Requests that have been assigned to the Change Group/Project.
Unassigned Requests	All Requests that exist in the system and have not been assigned to the Group.
Potential Requests - Item Type & Classification	Requests in the system that match the Item Type and/or Classification of the Group.
Potential Requests- Keyword match	Requests with keywords that match between the Request description and the Group description. NOTE: The match is only performed on the first 250 characters of the description.
All Change Requests (sys)	Lists all Requests in the system irrespective of Workflow State or User assignment. Note that this option is not visible to Technicians when the privilege to View All Requests is disabled by the Administrator.
My Change Requests (Active) (sys)	Displays all Requests in an active Workflow State that are assigned to the logged-in User.
My Change Requests (All) (sys)	Displays all Requests, in active and inactive Workflow States, that are assigned to the logged-in User.
My Teams Change Requests (Active) (sys)	Displays the all the RFCs in an active Workflow State allocated to the Teams with which the User is associated.
My Teams Change Requests (All) (sys)	Displays the all RFCs, in active and inactive Workflow States, allocated to the Teams with which the User is associated.
Pending Approvals (sys)	If the User has Manager privileges, this view provides them with a list of Requests that are assigned an Approval stage of the Workflow.

To link Requests within the Change Group Analysis tab:

1. Go to Change>Change Groups

2. Select the Change Group # link
3. Move to the Analysis tab
4. Choose the Filter option
5. Select the relevant RFC checkbox on the left

Change Group - Multiple Item Request created by Sankar R

Details Analysis Elements

Add Search Filter: Unassigned Requests Display: 25

Request #	IP	Created	Status	Priority	Item Type	Technician	Team	Customer	Group	Subject
<input type="checkbox"/>	01/13/16	14:27	Pending - No Contract	Medium	Iphone 6	Ingo Engels	Change Management Team	Vamsi Krishna		A1
<input type="checkbox"/>	01/13/16	14:17	Pending - No Contract	Medium	Iphone 6	Ingo Engels	Change Management Team	Vamsi Krishna		A
<input type="checkbox"/>	01/13/16	14:15	Pending - No Contract	Medium	Windows Bundle	Ingo Engels	Change Management Team	Sankar R		Change Request - Item has been marked for creation

6. Click Add
7. Click Done to return to the Groups list.

Elements Tab

The Elements tab displays all the Requests that belong to the Change Group. From this screen, any Request can be removed.

To remove a Request:

1. Go to Change > Change Groups
2. Select the Change Group # link
3. Move to the Elements tab
4. Select the checkbox of the relevant RFC

Change Group - Multiple Item Request created by Sankar R

Details Analysis Elements

Remove Export Current Page Project Display: 25

Request #	IP	Created	Status	Priority	Item Type	Technician	Team	Customer	Group	Subject
<input type="checkbox"/>	01/12/16	16:59	Pending - CAB	Medium	Iphone 6	Ingo Engels	Change Management Team	Sachin Kumar	Multiple Item Request created by Sankar R	A
<input checked="" type="checkbox"/>	01/12/16	16:59	Pending - CAB	Medium	Iphone 6	Ingo Engels	Change Management Team	Sachin Kumar	Multiple Item Request created by Sankar R	A
<input type="checkbox"/>	01/13/16	14:27	Pending - CAB	Medium	Iphone 6	Ingo Engels	Change Management Team	Vamsi Krishna	Multiple Item Request created by Sankar R	A1

5. Click the Remove button.

Merging Change Groups

Existing Change Groups can be merged within the Change Groups tab, to allow all related RFCs within the Groups to be managed as one.

To combine Change Groups:

1. Go to Change>Change Groups
2. Check the fields next to the relevant Group #'s

3. Click Merge

The screen defaults to the Details tab for the Merge Group.

4. Set the Name, Item Type, Classification, Status, Priority and Description that best defines all associated Requests

5. Click Save.

The History tab records details of the Groups merged to form the new Group. Click the No. hyperlink to view the details. The Impact Tab records the Type and Number of requests associated with the Group.

Closing a Change Group

To close a Change Group and all related requests:

1. Go to Change>Change Groups

2. Select the Change Group # link

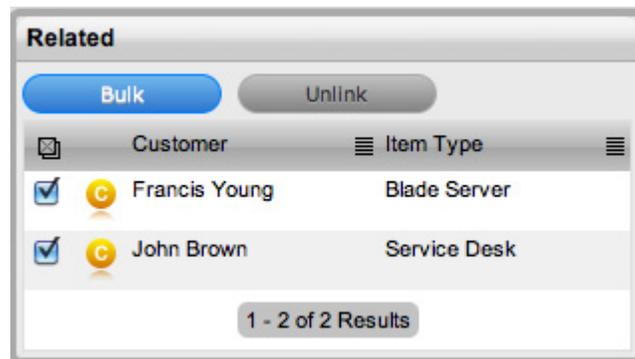
3. Move to the Elements tab

4. Select a Request # hyperlink

The Summary tab of the Request is displayed.

5. Click Edit

6. Within the Related sidebar check all related Change Requests



7. Select the Bulk option

The Bulk Editor screen is displayed.

8. Select the relevant Exit State

9. Click Save
10. Click Save and Done.

The Details tab of the Group now displays a Status of Closed - Resolved.

NOTE: When an RFC is duplicated, the new RFC is linked to the original RFC creating a Change Group. RFCs can be unlinked through the Group's Related tab.

- ♦ [Multi Item RFCs](#)

2.5.3 Grouping Change Requests

RFCs can be linked to form project Groups when Requests are related in some way (e.g., Requests that require the same action). New Groups must consist of Requests that are not already linked.

Creating a New Group via the Change Request Tab

1. From the Change Requests list under the Changes tab, tick the check boxes in the far left-hand column corresponding to unlinked Requests
2. Click Link to group the RFCs.

A Group Number will be assigned and an instant Group hyperlink will appear under the Group column, if included in the List View.

Request #	Status	Priority	Due Date	Technician	Team	Item Type	Customer	Description	Subject
<input checked="" type="checkbox"/> 100074	Pending - CAB	Medium	01/16/16 12:34	Ingo Engels	Change Management Team	Iphone 6	Sachin Kumar	A	A
<input checked="" type="checkbox"/> 100070	Pending - No Contract	Medium	01/16/16 11:24	Ingo Engels	Change Management Team	Iphone 6	Vamsi Krishna	A	A
<input type="checkbox"/> 100069	Pending - No Contract	Medium	01/16/16 11:10	Ingo Engels	Change Management Team	Iphone 6	Sankar R	Change Request - Item has been marked for creation	Change Request - Item has been marked for creation

Adding RFCs to an Existing Group

To add RFCs to an existing group:

1. Within the Change Requests list, check the boxes of the new RFCs and at least one member of the Group to which you wish to add the RFC
2. Click Link.

NOTE: This will not work if RFCs representing more than one group are included. For instance, if you have two Groups (A and B) each with two RFCs (A1, A2, B1 and B2), and you want to add two unlinked RFCs to Group A, click the check boxes for the unlinked RFCs and either A1 or A2 or both. If B1 or B2 is also clicked, the linking process will fail because it will not know which group to add the two new RFCs to.

Merging Request Groups

Existing Change Groups can be merged within the Change Groups tab, to allow all related Requests within the Groups to be managed as one. To combine Change Groups:

1. Go to Change>Change Groups
2. Check the fields next to the relevant Group #'s
3. Click Merge

The screen defaults to the Details tab for the Merge Group.
4. Set the Name, Item Type, Classification, Status, Priority and Description that best defines all associated Change Requests
5. Click Save.

The History tab records details of the Groups merged to form the new Group. Click the No. hyperlink to view the details. The Impact tab records the Type and Number of requests associated with the Group.

2.5.4 Grouping Requests

- ◆ [“Multi-Item RFCs” on page 473](#)
- ◆ [“Multi-Item Request Item Assignment” on page 473](#)

Multi-Item RFCs

Also displayed within the Change Groups List View are any Groups that are created as Multi-Item Requests. These Requests allow for multiple Items to be assigned during the Change Request creation process and result in separate Requests being created for each Item assigned to the initial RFC, which are then displayed within the Related Requests window of the Change Request Information screen.

The Requests are managed as individual Requests to cater for any special requirements relative to each Item. For example, consider a situation where a Team deploys an update in an organization. In this instance, during the RFC creation process multiple Items are assigned to a single Change Request, which the system automatically allocates to separate RFCs that are then managed on an individual basis. This allows appropriate Teams/ Technicians to be assigned to the RFCs relative to their skill-set or departmental assignments. The implementation process more effectively differentiates between the tasks and Items being modified and ensures each Item has its own Audit Trail, Attachments and Notes for future reference.

Multi-Item Requests are also listed as separate Change Requests within the Change Requests List View.

The screenshot displays the 'Change Request Information' interface for 'Change Request # 100076'. It features a top navigation bar with tabs for Customer, Contract, Analysis, Summary, Notes, Attachments, Impact, and Audit Trail. Below this are action buttons: Add Note, Add Attachment, Duplicate, Print, and Alerts. The main content area is divided into several sections: 'Details' (Title, Customer: Sachin Kumar, Item Number: 10000101, Type: Iphone 6, Classification: General, Urgency: Moderate, Impact: Moderate, Priority: Medium, Escalation: On, Escalation Layer: Default Group, Technician: Ingo Engels), 'Notification' (Customer/Technician Email dropdowns, Customer/Technician CCs fields), 'Change Request' (Team: Change Management Team, Workflow: Standard Change Workflow, Status: Pending - CAB, Next Action: Pending - CAB), 'Service Terms' (Agreement: SLA, Service Desk: Joe, Progress: 100%, Open Date: 01/16/16 12:49, Due Date: 01/16/16 12:49, FSC Date, Last Action: 01/13/16 12:48, Time Recorded), and 'ZENworks Tools' (Manage Bundles, Remote Control buttons).

Multi-Item Requests are created like a single Item Request, but have more than one Item assigned during the Change Request creation process.

Multi-Item Request Item Assignment

After assigning a customer to a Request move to the Find Item field to assign Items to the Request:

1. Click the relevant Item link if listed below the Find Item search box

Or, [Search for an Item](#) or click **+** to [Create an Item](#).

The option to create an Item is only available to Technicians if the system Administrator has enabled the Create Items option within the Setup>Privileges>User screen.

Request Information

Customer

Title

Name James Stewart

Org. Unit Micro Focus - Information Technology

Room

Email james@nsd.com

Phone

Mobile

Fax

Pager

Address 1

Address 2

City

State

Zip

Country

Item

Item Number Wifi Service

Category Service

Item Type WIFI Service

Identifier Type:

Team Change Management Team

Room

Service Warranty

Cancel Add Next

- Click Next to move to the Details tab if only one Item is to be assigned to the Request
Or, select Add to assign additional Items. If Add is selected, a Request Selections window will be displayed that lists all the current Items assigned to the Request.

Selections

Customer	Item No.	Item Type
James Stewart	Wifi Service	WIFI Service

1 - 1 of 1 Results

- Continue to add all the relevant Items to the Request and then select Next to move to the Details tab
Within the Details tab the Request is profiled by assigning a Classification and Description.

Request Information

Customer

Details

Request

Request Type New Change

Classification

Service Desk Question

Email Permission Denied

Details

Subject

Description

Format Font Family Font Size HTML ABC

Path: Words:0

Cancel Done

- Select the Classification, enter the Subject and Description

5. Click Done to enter all Requests simultaneously.

The Requests are created individually and automatically applied to a Group.

2.5.5 Related Requests

RFCs that are included in a Change Group list the associated RFCs within the Related tab of the Change Summary tab. .

Grouping Requests

Requests can be grouped by selecting the checkboxes next to the Task list, followed by the Link button.

NOTE: The type of Request Group created is based on the Request type assigned to the Group.

- ♦ If the Group contains Service Requests/Incidents, it is an Incident Group
- ♦ If the Group contains Incidents/Problem, it is a grouped as a Problem
- ♦ If the Group contains Service Requests/Change, it is a Change Group
- ♦ If the Group contains Service Requests/Incidents/Problem/Change, it is a Change Group
- ♦ If the Group contains Problem/Change, it is a Change Group.

As part of the Change Management Process, all requests related to a Change Request are automatically closed when the related RFC is closed. The system views the request hierarchy from low to high as Service Request, Incident, Problem and Change Request, and if a related request of a higher type is closed, all the lesser type requests are automatically closed, or if the handshaking facility is enabled for the system, moved to the Pending-Approval State.

2.5.6 Releases

- ♦ [“Release and Deployment Management” on page 475](#)
- ♦ [“Releases” on page 476](#)
- ♦ [“Release Management Applied” on page 490](#)

Release and Deployment Management

The purpose of Release and Deployment Management is to maintain the integrity of an organization's production environment when deploying releases. Effective Release and Deployment processes allow your service organization to deliver change faster and with minimal risk to the business. It provides consistency in implementation approach and assures customers that they can use a new or changed service in line with business requirements.

Part of the Service Transition phase of the Service Lifecycle, Release is responsible for planning, scheduling and controlling changes and updates from Test to Live environments. It ensures the integrity of the Live Environment is protected and that the correct components are released. While Deployment includes the activities or tasks responsible for moving new or changed hardware, software, documentation and process to the Live Environment.

This process is overseen by the Release Manager, whose role is paramount to the success of a release and a required member of a Release Team. The Release Manager directs the process using all information presented to help assess release readiness, and to efficiently identify deployment targets for the deployment phases of a release. This level of control guarantees the Release Manager can deliver updates to the live environment successfully, to all relevant parties, on time.

The capability to leverage relationship maps defined within the embedded CMDB allows the Release Manager to assess the impact of a release, as all related Items can be easily associated with a release package. The extensive use of CIs to represent all aspects of a release and the capability to directly associate any category of CI with the release itself provides a complete picture of how a release will impact the organization before any tasks are undertaken. The Release Manager can identify CI Types impacted by the deployment and CMDB information details users, organizational units and specific infrastructure affected by a release.

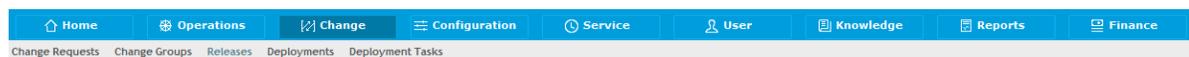
Complex and generally a lengthy process, large scale deployments require project management to ensure success. To this end, Release Management includes related activities that require scheduling in and around the internal activities of the service desk. The Release Manager can readily achieve this by exporting release package information to Microsoft Project and administering the full process using a dedicated project management tool.

Exported project files contain all related Change Requests for a Release, providing all relevant parties with an end-to-end schedule of change. The export can also be filtered to include deployment activities that can be merged into the final schedule once the Implementation of all Changes is completed, resulting in a full historical account of the release cycle.

Within the system, the Release Manager creates and manages the Release within the Change>Release tab. Within the Deploy tab of a Release, the Deployment Tasks are generated and made available as groups within the Change>Deployment tab, while the individual activities are available within the Change>Deployment Tasks tab.

To review examples of Release and Deployments, refer to [Release Management Applied](#).

Releases



Users who are assigned the Change Process of Release are provided access to the Releases, Deployments and Deployment Tasks sub-menu options within Change. These Users can oversee the Release process and also action Deployment Tasks, as required.

Within the Release tab, Users can create Releases, with the associated Deployments and Deployment Tasks. The Releases can also be exported using the Project button, to allow the User to manage the Release in a project management tool.

The Releases tab defaults to show active Releases logged in the system. This view can be filtered to show:

Filter	Description
My Releases (Active)	Displays all Releases in an active Workflow State that are assigned to the logged-in User.
My Releases (All)	Displays all Releases, in active and inactive Workflow States, that are assigned to the logged-in User.
Releases (Active)	Displays all Releases logged in the system that are in an active Workflow State.
Releases (All)	Displays all the Releases logged in the system regardless of their Status or Assignment.

The list can be re-sorted by clicking on a column header and the number of Releases displayed per batch can be altered using the Display pop-up option.

Getting started with Release Management

Before creating Releases, the [Workflow](#) and [Team](#) need to be configured. Also, Release Managers need to decide if Deployments are to be controlled by Change Management. Doing so means that when the Release moves into a Deployment State of the Release Workflow, RFCs are automatically generated and must follow the Change Workflow to the assigned Deployment State, before the Deployment Tasks can be acted upon. To manage Deployments with Change Management, the Administrator must enable Control Deployments via RFC in Admin>Setup>Privileges>Requests.

Creating a Release

Releases within the system include the following five areas of information:

- ◆ *Details*: Provide a Release overview describing the Release, its Priority, assigned Workflow and Workflow State, and Release Manager
- ◆ *Types*: Details the Item Types that are to be affected by the Release and if the Release involves installing new, updating or replacing Items
- ◆ *Analysis*: Allows the User to associate existing Change Requests to the Release
- ◆ *Related*: Lists the Change Requests assigned to the Release
- ◆ *Deploy*: Defines where the Release is to be pushed out to, this covers specific Customers, Organizational Units and Global Releases.

Details Tab

The Release Manager defines all elements related to the Release within the Details Tab.

After entering the initial information about the Release, the Manager also uses the Details Tab to move the Release through the Workflow States. Each stage of the Workflow can be assigned to different Managers, so by moving the Release through the Workflow States, the User is also potentially reassigning control of the Release.

Also, within the Workflow, States may be defined as Approval or Deployment States. When the Workflow moves into an Approval State, the accept and reject options are visible. The Manager selects the appropriate option and the system automatically moves the Release to the pre-configured State of the Workflow relative to the option selected.

If the Workflow is configured as a Deployment State, when the Release is moved into this State, the Deployment Tasks created within the Release can be actioned by the assigned Technicians. However, if the "Control Deployment via RFC" is enabled, when the Release moves into a Deployment State, RFCs are automatically created for the Deployment, and when the RFCs hit the Deploy State configured within the Details tab of the Release, the Deployment Tasks become active and allow Technicians to action the Tasks. The Change Manager can view all Deployment Tasks related to the RFC within the RFC Summary screen and when all Tasks are moved to Closed-Resolved the Change Manager can close the related RFC.

When all Deployment Tasks are completed, the Deployment is automatically closed by the system and the Release Manager can close the Release within the Details Tab, by moving the Release Workflow to the Exit State.

To create a Release:

1. Go to Change>Releases
2. Click New

3. Complete the following information:

Release Fields	Description
Name	Enter a Name that reflects the objective of the Release.

Release Fields	Description
Priority	Set the Priority, which will correspond to the target timeframes for the SLAs associated with the Release via the RFCs.
Team	Select the Release Team who will oversee all part of the Release.
Workflow	Set the Workflow that includes the relevant stages to manage the Release. The Release Manager moves the Release through the stages of the Workflow, relevant to the events being undertaken and completed.
Status	This is set to the Default Entry State of the selected Workflow.
Next Action	Based on the assigned Workflow, select the next Workflow State for the Release, as required by the next Release activity. Some States are Approval States, when the Release moves to an Approval State the Approve 🗳️ and Reject 🚫 options are visible. The Release Manager selects the appropriate option and the system automatically moves the Release to the pre-configured next State, relative to the option applied.
Manager	From the drop-down list of Managers assigned to the default Entry Point of the assigned Release Workflow, select the Release Manager to manage the project when it is initially created. The User defined here, is the Manager who can edit the Release after it is saved and then move it to the next State.
RFC Control	If the Control Deployments via RFC option is enabled in Admin>Setp>Privileges>Requests, this field will be displayed. Select Yes if the Deployment is to be routed through Change Management, to enable the scheduling of Deployment Tasks. Select the RFC Workflow to manage the Change Request associated with the Deployment, and set the default Open State or Deployment State for the Tasks (i.e., when the RFC moves into this stage of the Change Workflow the associated Deployment Tasks move Pending to Open allowing the Technician to work on the Task.)
Description	Enter information that describes the goal of the Release.

4. Click Save.

Move to the Types tab to associate the Item Types with the Release, for Items being upgraded, replaced and installed from new.

Attachments

The Attachments tab allows the Manager to upload any relevant files, but also provides access to any Media Files that are associated with Deployments during the Release and Deployment creation process.

To add Attachments to a Release, within the Release's Details tab:

1. Click Edit to display the Attachment tab New button
2. Click New

3. Browse and select a file
4. Enter a Description, if required
5. Click **Upload**.

To delete an attachment, tick the field next to the File Description name link and select the Delete button.

Impact

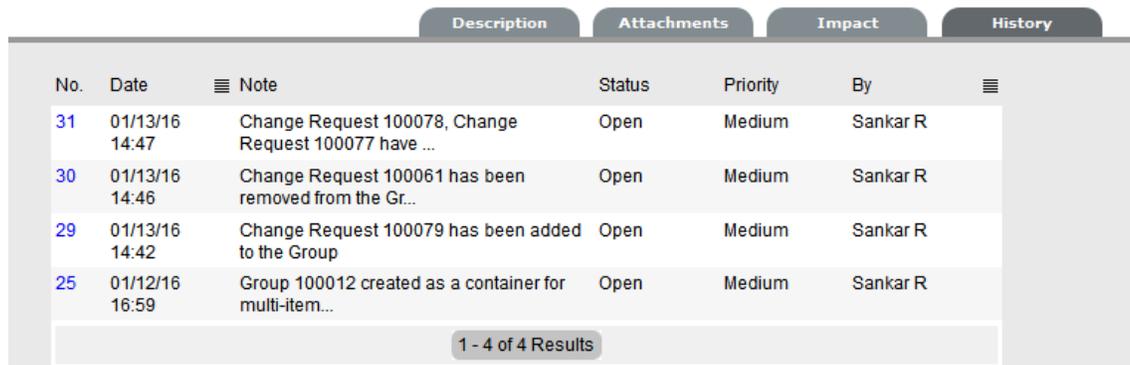
The Deployment Tasks filter view of the Impact Tab displays the number of Deployment Tasks per Status associated with the Release. While the Change Requests view shows all RFCs, and their current Workflow State, associated with the Release using the Analysis Tab and also listed in the Related tab.



History

The History tab records all changes and updates for the Release, relative to the assigned Workflow State. To view a historical entry within the Release Details tab:

1. Select the History tab

A screenshot of a software interface showing a tabbed view with 'Description', 'Attachments', 'Impact', and 'History' tabs. The 'History' tab is active. Below the tabs is a table with the following data:

No.	Date	Note	Status	Priority	By
31	01/13/16 14:47	Change Request 100078, Change Request 100077 have ...	Open	Medium	Sankar R
30	01/13/16 14:46	Change Request 100061 has been removed from the Gr...	Open	Medium	Sankar R
29	01/13/16 14:42	Change Request 100079 has been added to the Group	Open	Medium	Sankar R
25	01/12/16 16:59	Group 100012 created as a container for multi-item...	Open	Medium	Sankar R

At the bottom of the table, there is a summary bar that says '1 - 4 of 4 Results'.

2. Click on the identification number hyperlink to display the entry details
3. Click Cancel.

The expanded window is closed.

Item Types Tab

Within the Types Tab the Release Manager can define one or multiple Item Types for the Items that will be affected by the Release and why the Types will be affected. The reasons the Types are affected include creating new Items, updating existing Items in the CMDB, or replacing existing Items with other newly created Items.

If the Release involves creating a new Item, it is assumed the Item Type does not exist in the CMDB, therefore setting the Reason to New allows the User to create a new Item Type and set the default service Teams, SLAs and criticality level of the Item Type. If the Release is to update an existing Item, the User only needs to search for an existing Item Type in the CMDB and assign it within the Release Types tab. Releases that cover an Item replacement require the User to associate the existing Item Type with the Release and create a new Item Type. A Release can include a mix of reasons, if relevant.

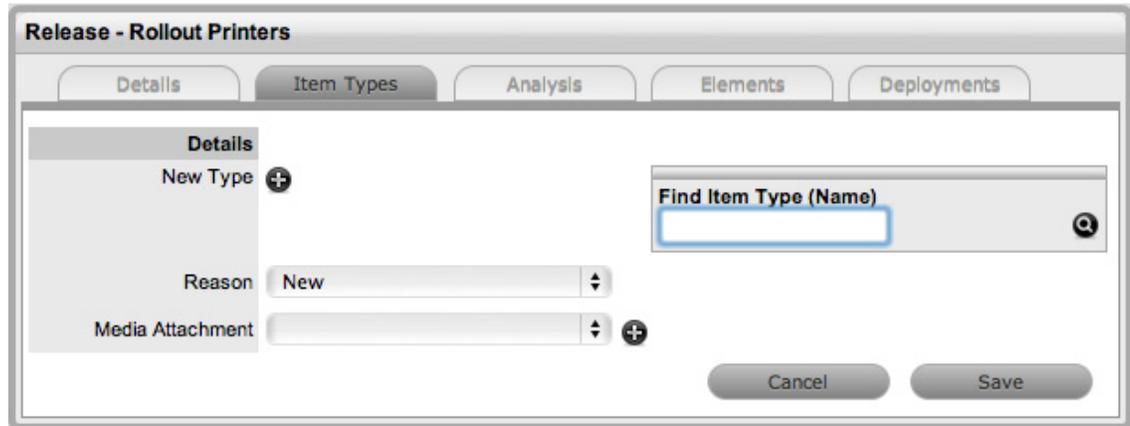
As part of defining all Releases, media attachments required for the process, such as an installer or executable file, can be associated with the Release in the Types tab.

New Items can be created from existing Item Types by using the Find Item Type field in the Item Types tab, but to define new Item Types for Items that are to be created as part of the Release, with the Item Types tab in Edit mode:

1. Click



The New Type field is displayed.



2. Select 

The Item Types field is expanded to allow the User to create a new Item Type.

3. Enter the Name for the Item Type and set all other Item Type template information
4. Click Save

The screen displays Item Details Fields for the Item being created.

5. Enter any known details in the Item Details Fields

This information will automatically be populated to the newly created Item's Details tab, when the Deployment Task is completed and the Item entered into the CMDB.

6. Upload a media file for the new Item, if relevant

The media file may be an installer or executable file and will be made available within the Deployment Task.

7. Click Save.

Additional Item Types can be added to the Release by repeating the above process.

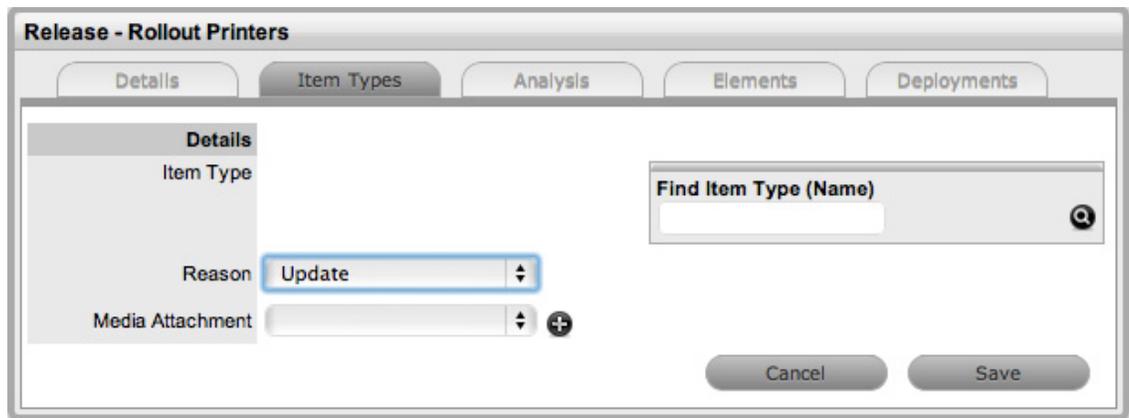
To upgrade Items as part of the Release, define the Item Type within the Types tab in Edit mode by:

1. Click



2. Set the Reason to Update

The Find Item Type option is displayed.



3. Search and select an Item Type

The Item Details Fields are displayed.

4. Complete any information that is to be updated in existing Items associated with the Item Type

For example, if the Release involves upgrading software it would be relevant to include the new version number in the Item Details. All Items that use this Item Type would have their Item Details automatically updated, based on the information entered here, when the Deployment Tasks are completed.

5. Upload a media file for the new Item, if relevant

The media file may be an installer or executable file and will be made available within the Deployment Task.

6. Click Save.

Additional Item Types can be added to the Release by repeating the above process.

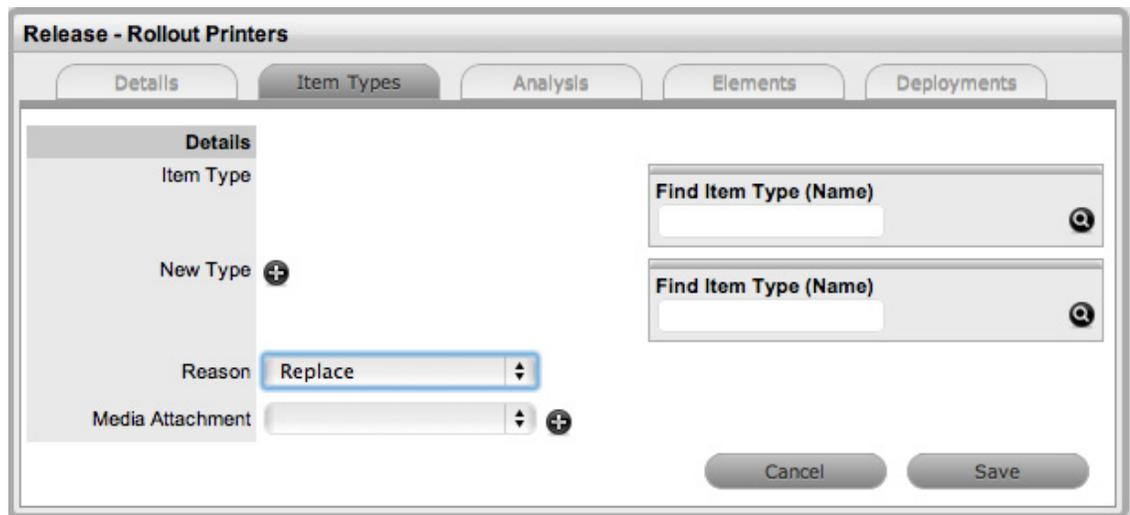
To replace Items as part of the Release, define the Item Type within the Types tab in Edit mode by:

1. Click



2. Set the Reason to Replace

The Find Item Type search field is available for the Item Type that is to be replaced. The New Type field displays the options to create a new Item Type by selecting  or searching on an existing Item Type using the Find Item Type field.



3. Search and select the Item Type to be replaced
4. Use the Find Item Type field within the New Type field to replace the Item Type with a Type that exists in the CMDB

Or, create a new Item Type by clicking **+**. The Item Types field is expanded to allow the Manager to create a new Item Type.

5. Enter the Name for the Item Type and set all other Item Type template information
6. Click Save

For the new or existing Item Type associated within the New Type field the screen displays Item Details Fields for the Item being created.

Release - Rollout Printers

Details **Item Types** Analysis Elements Deployments

Details

Item Type Oracle 11g

New Type MySQL

Reason

Media Attachment

Fields

CPU

RAM

MAC Address

Network Address

Network Name

Platform

OS Version

Version

Licenses

Serial Number

Platform String

Find Item Type (Name)

Find Item Type (Name)

Item Type	Item Category
Email Service	Service
HP 3200	Printers & Scanners
Office 2008	Software
Oracle 11g	Hardware
Service Desk	Service
Service Manager	Software

1 - 6 of 6 Results

7. Enter any known details in the Item Details Fields

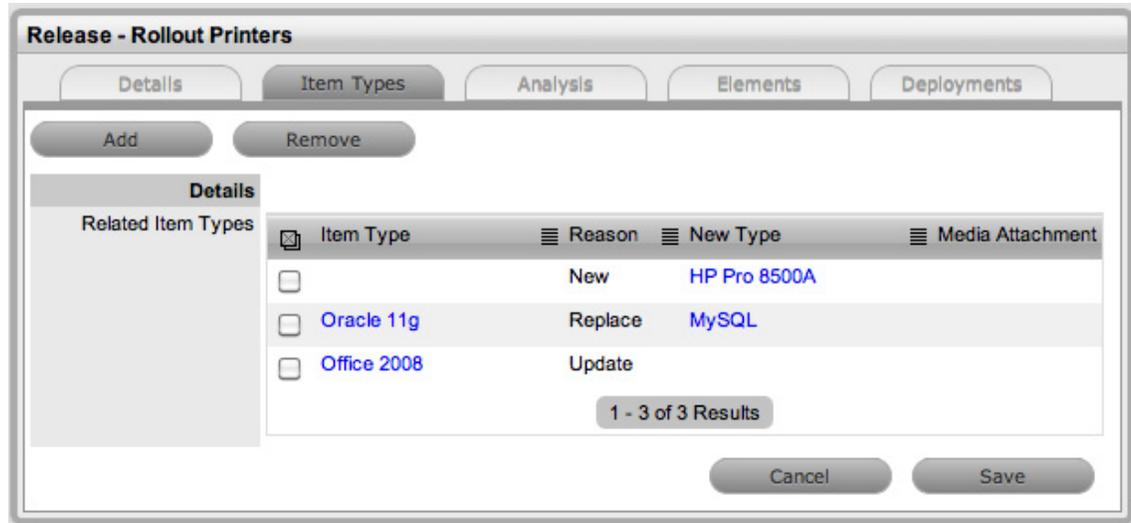
This information will automatically be populated to the newly created Item's Details tab, when the Deployment Task is completed and the Item entered into the CMDB.

8. Upload a media file for the new Item, if relevant

The media file may be an installer or executable file and will be made available within the Deployment Task.

9. Click Save.

Additional Item Types can be added to the Release by repeating the above process.

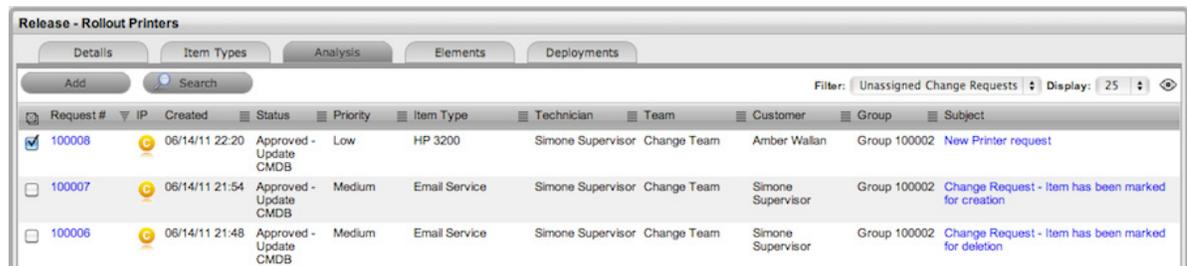


After all the Item Types have been added to the Release click Save, and move to the Analysis tab to associate any pre-existing Change Requests to the Release package.

Analysis Tab

As a Release Manager, the Analysis tab allows you to associate any pre-existing Change Requests to a Release. To add RFCs to a Release within the Analysis tab, check boxes next to relevant

Request # links and click **Add**.



Elements Tab

The Elements tab allows the Release Manager to view all Change Requests associated with the Release and output this information to PDF. This list can be managed by allowing the Manager to remove any irrelevant RFCs from the Release package.

To remove any RFCs from the Release, check boxes next to relevant Request # links and click

Remove

Deploy Tab

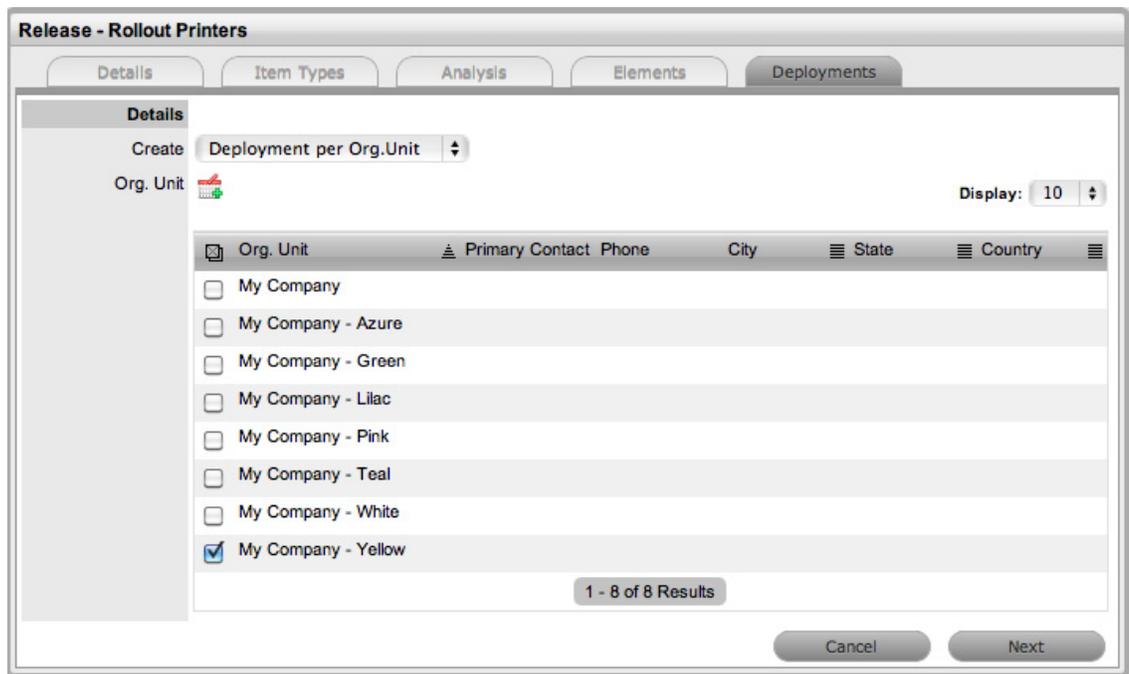
The Deploy tab allows the Manager to define where the Deployment is to be pushed and who will be working on the Release by creating Deployment Tasks. Deployments can be created on a Per Customer, Per Organizational Unit or Global Deployment basis.

To define the Deployments for the Release, with the Deployments tab in Edit mode:

1. Click New
2. Set the Deployment Type option:

Options	Description
Deployment per Customer	<p>Allows specific Customers and Items to be assigned to the Deployment. By selecting this option Customer Names are displayed for Customers that own Items derived from Item Types associated with the Release. Use the Search Options field to find a specific Customer.</p> <p>Use this option if an Item being created, updated or replaced is to be owned by the Customer directly.</p>
Deployment per Org. Unit	<p>Allows Organizational Units to be assigned to the Deployment for the Release. Selecting this option displays Org Units configured in the system.</p> <p>Use this option for Items that are created, updated or replaced as part of the Deployment, which are shared by all Org. Units included in the Deployment or are assigned ownership on a per Org. Unit basis.</p> <p>NOTE: Use the Search Options field to find a specific Org. Unit or select Search All for a search and view all Org.Units configured in the system.</p>
Global Deployment	<p>Sets the Workflow that includes the relevant stages to manage the Release. Selecting this option creates the Deployment for the entire customer base and displays the Next button.</p>

3. Tick the relevant Deployment targets in the list, for Customer or Org. Unit Deployments



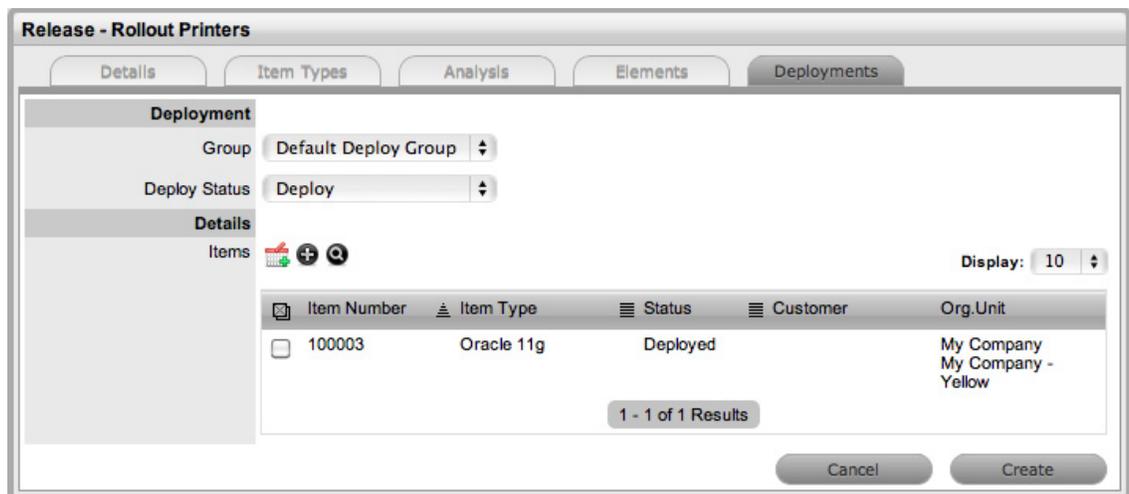
4. Click 

The selections are added to the Deployment and displayed in the Selected Org. Units side-bar.

5. Click Next

The screen allows the Manager to define the Deployment Work Group who will action the Deployment Tasks of the Release, and the State of the Deployment Workflow in which the tasks are to be actioned.

The Items Field will also display any Items associated with the Customer or Org Unit for Update or Replace Item Type Releases.



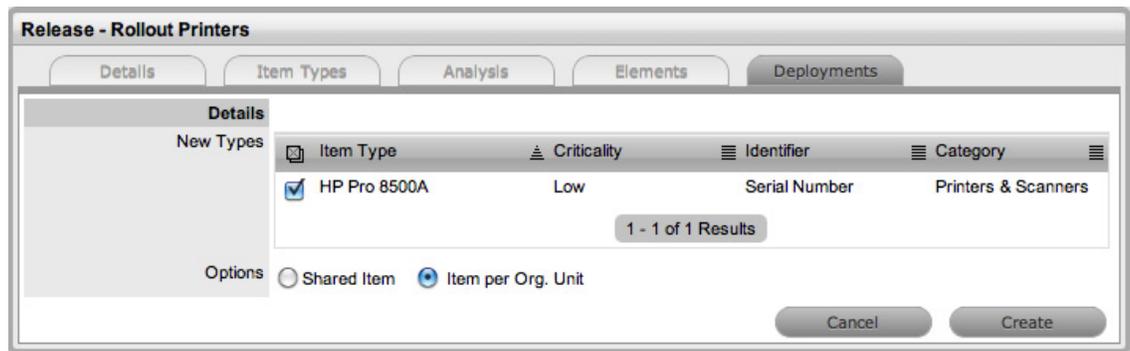
6. Set the Work Group who will complete the Deployment Tasks

The list is derived from the Groups tab of a Release Team.

7. Set the Workflow State that the Deployment Tasks move to Open

This is when the tasks are to be worked on by Technicians in the Work Group. The Deploy Status list is derived from Release Workflow States that have Deployment State option set to Yes.

8. For *Update & Replace* Item Releases, select one, multiple or all Items displayed in the Items List or use  to search for Items
9. Click  once the Items have been identified
The Items will be listed in a Selected Items sidebar.
10. For *New Item Releases*, click 
The screen defaults to the New Types list.
11. Select the Item Type for the Deployment
12. Set the Item Ownership Status



13. Click Create
The Selected Item box displays the New Item to be created. Continue to create Deployment Tasks, if relevant or click Create to lodge the Deployment in the system.
14. Click Done when all Deployment Tasks have been created.
A unique reference number is automatically generated for the request at this point. The Deployments will be listed within the Change>Deployments tab.

When all Deployment Tasks are created they are included in the Deployments listed in the Change>Deployments screen. The individual Deployment Tasks will be visible within the All Deployment Tasks filter of the Change>Deployment Tasks tab.

Working on Deployment Tasks

Releases can have multiple Deployments that are to be completed at different stages of a Release lifecycle, and to allow for this, multiple stages of the Release Workflow can be defined as Deployment States when creating a Release Workflow. The different Deployment States can be selected as the Deploy Status for a Deployment when a Release is created in the system. Then, as the Release Manager moves through the Release Workflow, by adjusting the Next Action State in the Details tab of the Release, and when a State that is assigned as the Deploy Status for the Deployment is assigned to the Release, the Deployment Tasks move into an active Open State.

When a State that is assigned as a Deploy Status is selected for the Release, the Deployment Tasks for that Deployment created within the Release move to Open and can be actioned by the assigned Technicians. However, if Control Deployment via RFC is enabled, when the Release moves into the Deployment State, RFCs are automatically created for the Deployment, and only when the RFCs hit the Deploy State configured for the RFC Control option within the Details tab of the Release do the

Deployment Tasks become active. The Change Manager can view all Deployment Tasks related to the RFC within the RFC Summary screen, and when all Tasks are moved to Closed-Resolved the Change Manager can close the related RFC.

When all Deployment Tasks are completed, the Deployment is automatically closed by the system. When all Deployments are closed for a Release, the Release Manager can close the Release within the Details Tab, by moving the Release Workflow Status to the Exit State.

Release Management Applied

Release Management in the system provides Release and Deployment Managers with a centralized repository for managing the introduction of changes, regardless of size or risk, to the environment. Two examples for rolling out a Release are detailed below, as Releases can potentially be very complex, which requires great flexibility in the system.

The first example illustrates a software rollout, with software being upgraded, replaced and a couple of new installations. Although this Release may be considered a little complicated, the nature of the Release is low risk. Due to the minimal business criticality level of the Release, it has been decided that this deployment will not be controlled by Change Management. The second example that manages the update of Microsoft Exchange, a higher risk Release, controls the Deployment with Change Management.

Before commencing the examples, the system needs to be configured to handle Release Management and the following elements must be in place:

[Users assigned the Release & Deployment Process](#)

[Create a Release & Deployment Team](#)

[Build or Edit the Release Workflow.](#)

Example 1: Install, upgrade and replace Office packages

Release Objective: To rollout the latest update of Office 2008 to customers. Replacing existing software for customers that have Open Office, and installing new software for customers without access to any Office applications.

The example will apply the system default Release Workflow that includes an added Workflow State of Trial Deploy and also has a number of Approval States. It includes Deploy and Trial Deploy States as the Workflow stages for creating the related Deployment Tasks in the system.

The Release Team that will action the Deployment Tasks has also been divided into three Groups: Software, Hardware and all Deployment Technicians.

Release Fields	Description
Priority	Set the Priority, which will correspond to the target timeframes for the SLAs associated with the Release via the RFCs.
Team	Select the Release Team who will oversee all part of the Release.
Workflow	Set the Workflow that includes the relevant stages to manage the Release. The Release Manager moves the Release through the stages of the Workflow, relevant to the events being undertaken and completed.
Status	This is set to the Default Entry State of the selected Workflow.
Next Action	Based on the assigned Workflow, select the next Workflow State for the Release, as required by the next Release activity. Some States are Approval States, when the Release moves to an Approval State the Approve 🟢 and Reject 🛑 options are visible. The Release Manager selects the appropriate option and the system automatically moves the Release to the pre-configured next State, relative to the option applied.
Manager	From the drop-down list of Managers assigned to the default Entry Point of the assigned Release Workflow, select the Release Manager to manage the project when it is initially created. The User defined here, is the Manager who can edit the Release after it is saved and then move it to the next State.
RFC Control	If the Control Deployments via RFC option is enabled in Admin>Setp>Privileges>Requests, this field will be displayed. Select Yes if the Deployment is to be routed through Change Management, to enable the scheduling of Deployment Tasks. Select the RFC Workflow to manage the Change Request associated with the Deployment, and set the default open State or Deployment State for the Tasks.
Description	Enter information that describes the goal of the Release.

4. Select Save.

From the above screen snap, we can see that Simone Supervisor is the Release Manager assigned to the Release and that the Release is of low Priority, will be handled by the Release Team and managed using the Release Workflow. The Release is currently in the default entry point of the Release, the Plan State. It should be noted that moving through the Release

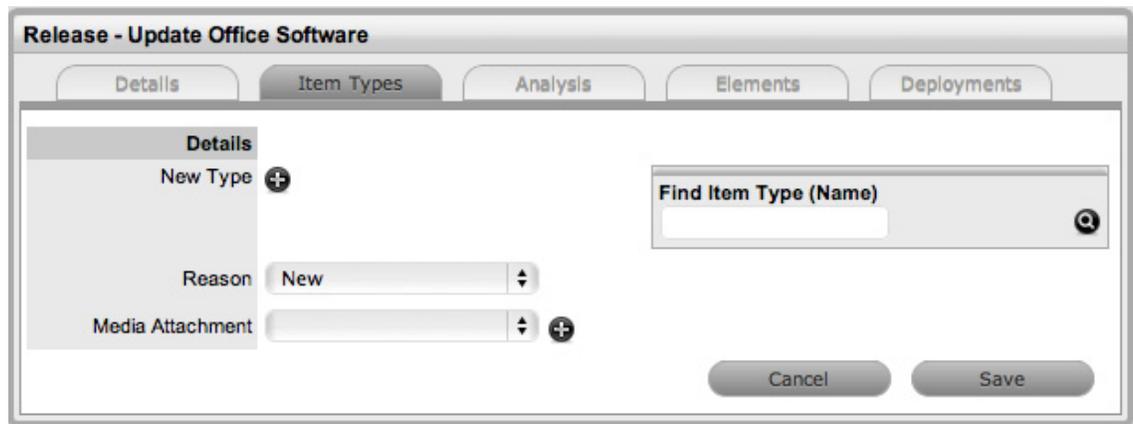
Workflow is determined by your organization's business processes and the defined Workflow. The system is to be used as a central repository to manage Releases and a point of reference to keep all relevant parties updated regarding a Release.

Assign Item Types

To associate the Items that are to be created or updated as part of the Release, the Release Manager has to define the reason for the Release and assign the relevant Item Type to the Release. This is achieved within the Item Types tab of the Release. For our example, there will be three reasons for the Release:- Upgrade existing software, replacing existing software and installing new software.

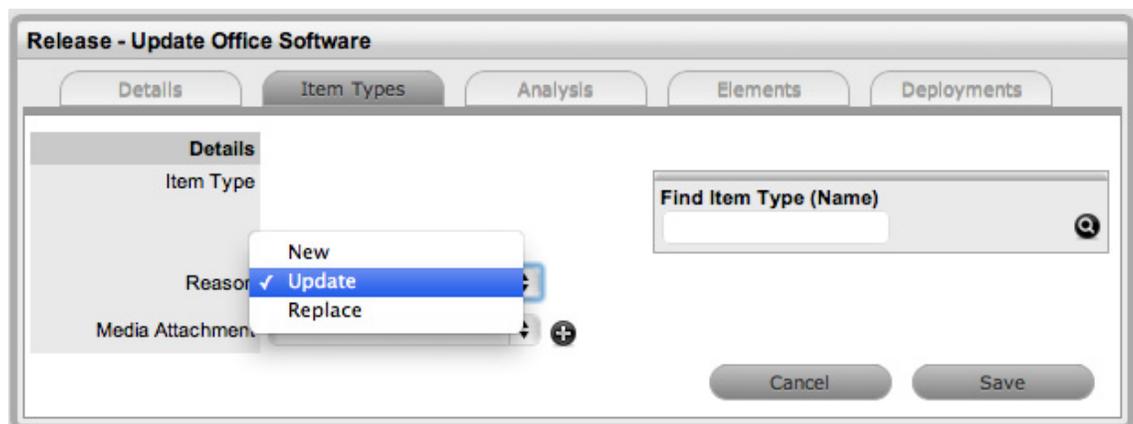
As a Release Manager, to assign Item Types to the Release:

1. Select the Item Types tab inside the Release information screen
2. Click Edit
3. Click Add



4. Assign the Reason of Update

For customers with Office 2008, based on the system configuration within the CMDB Item Type of Office 2008, we will just be updating the software version number in the Item Details tab.



5. Search and select the Item Type Office 2008 in the Find Item Type field

When the Item Type is associated with the Release, the fields available on the Details Tab of Items using the Type are displayed.

6. Enter the information that is to be updated against the Item in the CMDB and Save

For our example 2011 will be entered in the Version # field.

Release - Update Office Software

Details **Item Types** Analysis Elements Deployments

Details

Item Type Office 2008

Reason Update

Media Attachment

Fields

Location

Environment

Version # 12.0.3

License Key

License Count

License Expiry

Ownership

Order #

Supplier

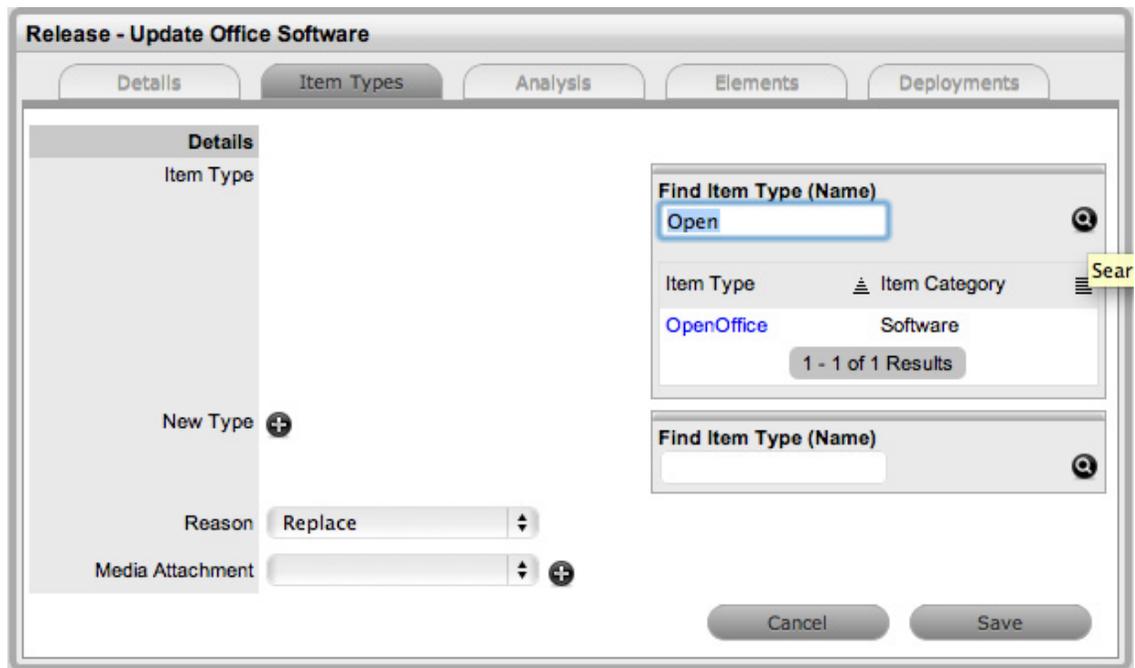
Supply Date

Find Item Type (Name)

Cancel Save

Details to be updated on the Items included in the Release

7. To *replace* Open Office with Microsoft Office 2008, click Add
8. Select the Reason of Replace
The Find Item Type field is displayed next to the New Type field.
9. Search and Select the Item Type to be replaced within the Item Type field
For this example it is Open Office.



10. Select the Item Type link for the Item Type to be replaced
11. Search and Select the Item Type that is to replace the existing Item Type
For this example, Office 2008 is the replacing Item Type.
12. Select the Item Type link for the Item Type information to be replaced
The fields contained on the Details tab of Items applying the Item Type are automatically displayed.
13. Enter information into the fields that are to be updated on the Items in the CMDB
For this example, the Version # details is updated to include 12.0.3.

Release - Update Office Software

Details **Item Types** Analysis Elements Deployments

Details

Item Type OpenOffice *Item Type to be replaced*

New Type Office 2008 *Replacement Item Type*

Reason Replace

Media Attachment

Fields

Location

Environment

Version # 12.0.3 *Information to be updated on the Details tab of the Item, as part of the replacement process.*

License Key

License Count

License Expiry

Ownership

Order #

Supplier

Supply Date

Find Item Type (Name)

Find Item Type (Name)

Cancel Save

14. Click Save
15. To create new Items in the system, click Add
The Reason of New is assigned by default.
16. Search and select the Item Type to be applied to newly created Items in the CMDB
For this example, new Items using Office 2008 are being created.
17. Assign the Item Type to the Release
The fields available on the Details tab of Items using the Type are displayed.

Release - Update Office Software

Details | **Item Types** | Analysis | Elements | Deployments

Details

New Type: Office 2008

Reason: New

Media Attachment: [Empty]

Fields

Location: [Empty]

Environment: [Empty]

Version #: 12.0.3

License Key: [Empty]

License Count: [Empty]

License Expiry: [Empty]

Ownership: [Empty]

Order #: [Empty]

Supplier: [Empty]

Supply Date: [Empty]

Find Item Type (Name): [Search Box]

New Items to be created using the selected Item Type

Information to be completed on the Details tab of the newly created Items

Cancel Save

18. Enter the information that is to be updated against the Item in the CMDB
For our example 12.0.3 will be entered in the Version # field.
19. Click Save

Release - Update Office Software

Details | **Item Types** | Analysis | Elements | Deployments

Add Remove

Details

Related Item Types

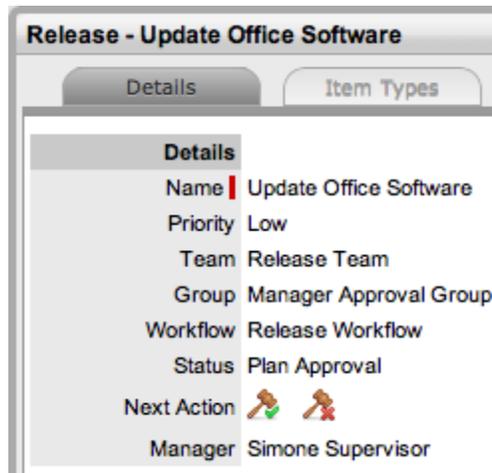
Item Type	Reason	New Type	Media Attachment
<input type="checkbox"/>	New	Office 2008	
<input type="checkbox"/> Office 2008	Update		
<input type="checkbox"/> OpenOffice	Replace	Office 2008	

1 - 3 of 3 Results

Cancel Save

20. After all Types have been assigned to the Release, move the Release to the next relevant State.

For this example, the Release moves to Plan Approval and approval is given. The system automatically moves the Release to Build.



As the Release is not to be managed using Change Management, the Release Manager can move directly to the Deploy tab to create the Deployment Tasks.

Create Deployment Activities

Deployment Tasks, the activities completed by Technicians included in the Release Team Groups, are created in the system by considering the physical location of the Customer or Organizational Unit. That is, when grouping the tasks that are to be completed as part of a Release, the system presents the information based on Customer location so Technicians can be deployed to specific locations to complete jobs.

Tasks can be created on a per Customer Deployment basis for Items that are assigned specifically to Customers. Or, for Items that are shared across Org. Units or by an Org. Unit, the Create option of Deployment per Org. Unit can be used for creating the Deployment. The Global Deployment option allows the Tasks to be created for the whole Organization as the Item being updated, created or replaced is owned/accessed by all Customers in the system.

Once the Customers are assigned to the Deployment, either directly or via an Organizational Unit the Release Manager must define the Group of Technicians within the Release Management Team who will action the Tasks and set the stage of the Release Workflow for the Deployment Tasks to move into an Active State ready to be completed by Technicians.

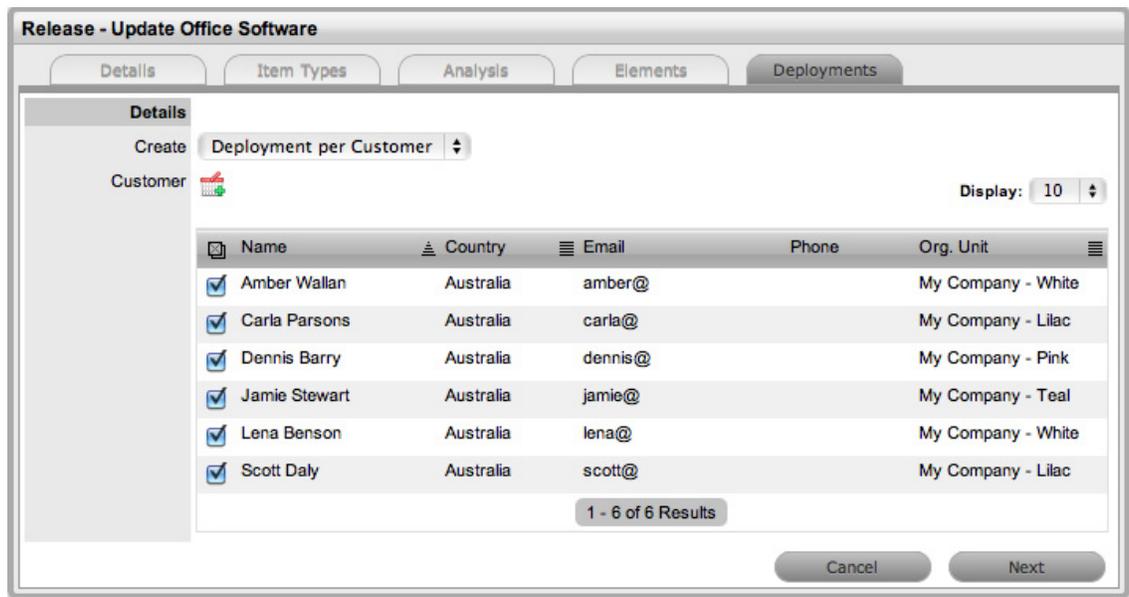
To create the group of Deployment Tasks:

1. Select the Deployments tab inside the Release information screen
2. Click New

The screen expands to show the options for the type of deployment to be created, the list of Customers who own an Item associated with the Item Types included in the Release Types tab and the Search Options box.

3. Select the type of Deployment that is to be created

For this example, per Customer Deployments will be created as all Items associated with the Release are owned directly by Customers. The list of Customers can be sorted into Org. Unit groups by clicking the toggle in the Org. Unit Column Header.

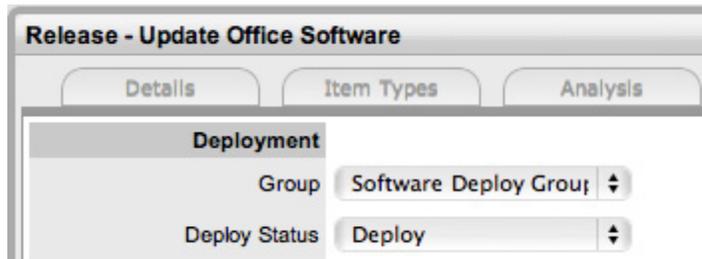


- Assign the Customer(s) to the per Customer Deployment by selecting the field next to the Customer name and clicking

The selection is included in a Selected Customers window to the right of the main window. When all Customers are assigned to the Deployment, the group of Technicians who will action the Tasks and the Workflow State where the Tasks will become active in the system must be defined.

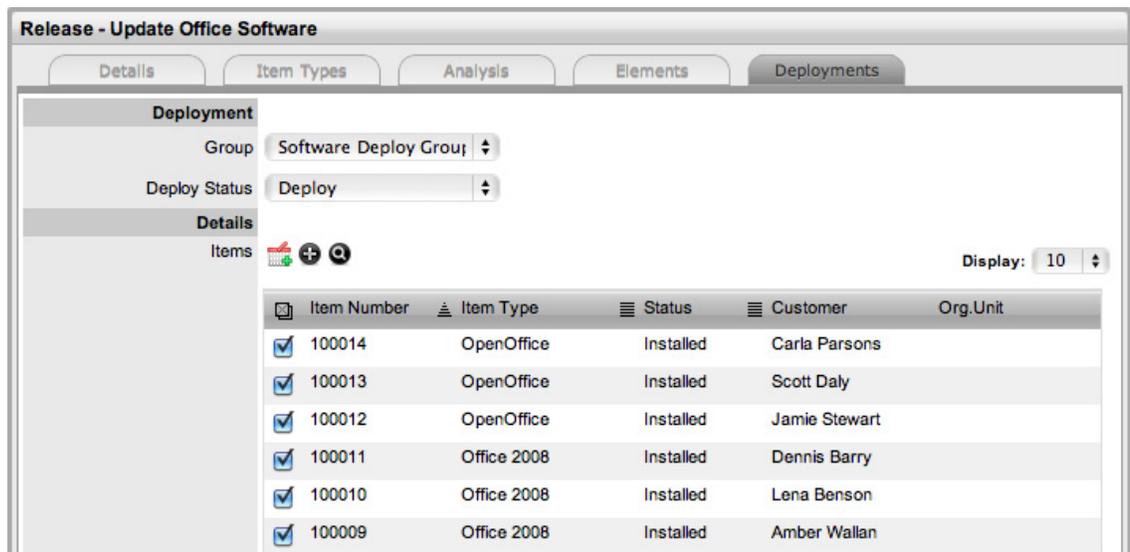
- Click Next
- Select the Group of Technicians who will work on the Deployment Tasks from the Group drop-down list

For this example the Software Technicians will be assigned.

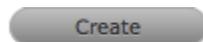


- Assign the stage of the Workflow where the Deployment Tasks will become active in the system
As the Release is related to simply upgrading or installing Office 2008, the Deploy State will be assigned as the action State.
- Select the Items to be included in the Deployment

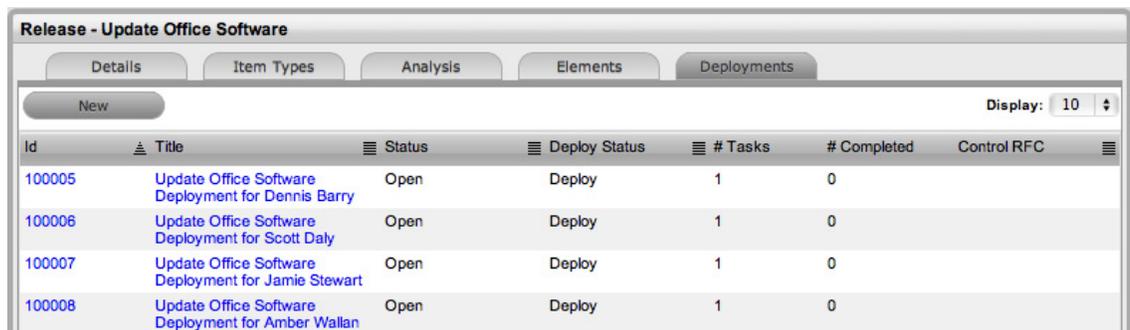
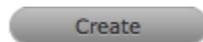
For this example, as the replacement and upgrade of Items is simple software, all Items will be created as one Deployment that will result in individual Tasks being created.



9. Click
10. Click

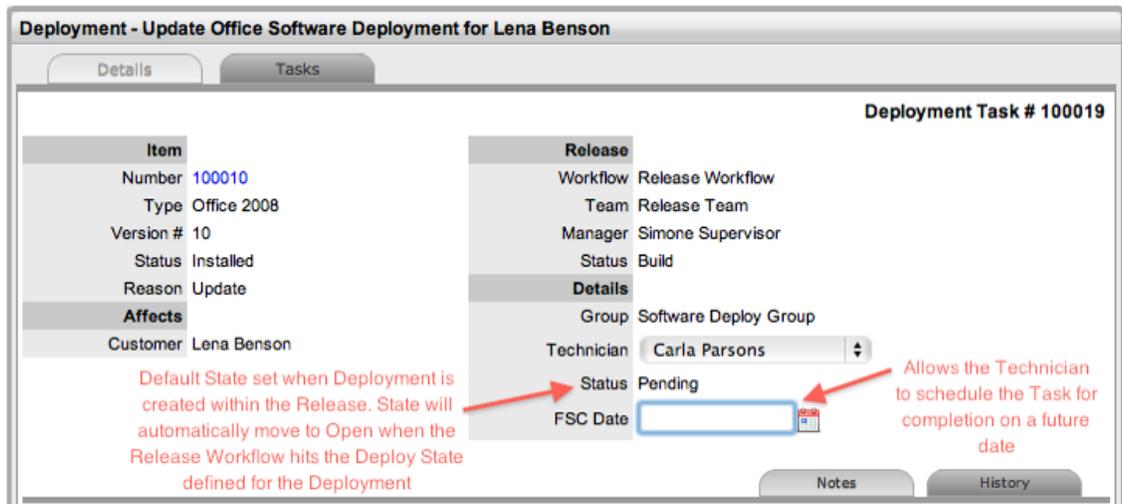


11. For the new installations of Office for customers select within the Items field
12. Tick the relevant Item Type and define if the Item is to be shared or one created for each Customer
13. Click



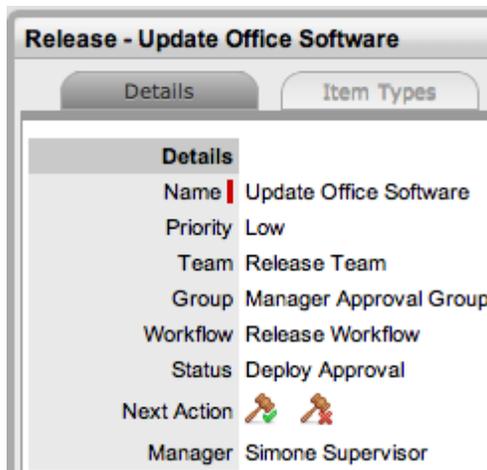
14. Click Done.

All Tasks are now saved with a Status of Pending assigned. When the Release Workflow moves to the Deploy State, the Tasks' Status will automatically be updated to Open, prompting Technicians to complete the Deployment Tasks and move their State to Closed - Resolved. When all Tasks are completed and moved to Closed - Resolved, the Release will be automatically Closed.

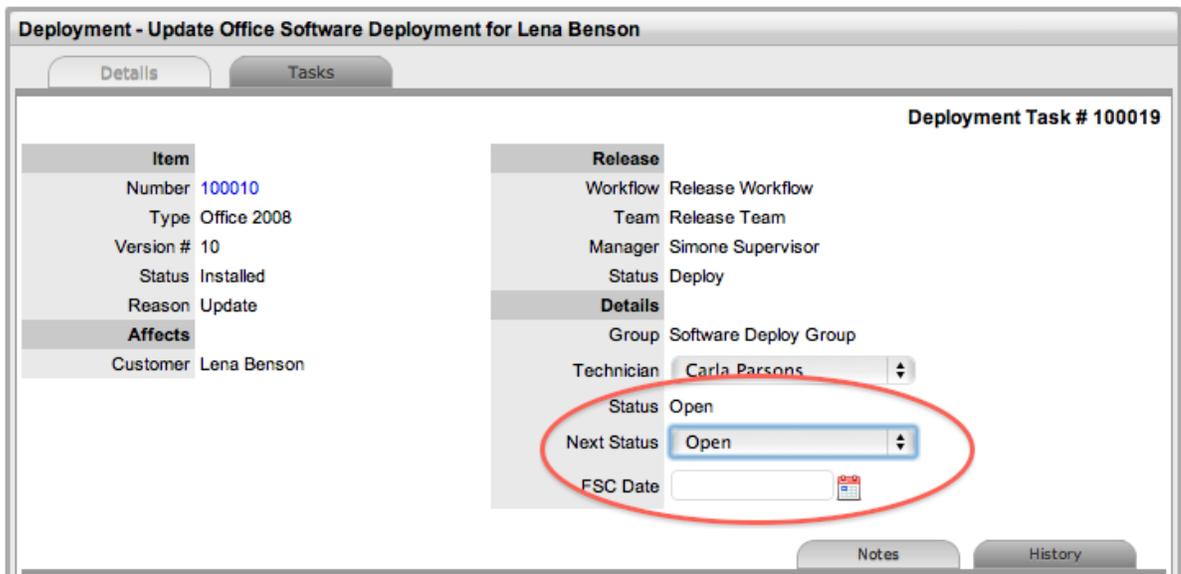


Action Deployment Tasks

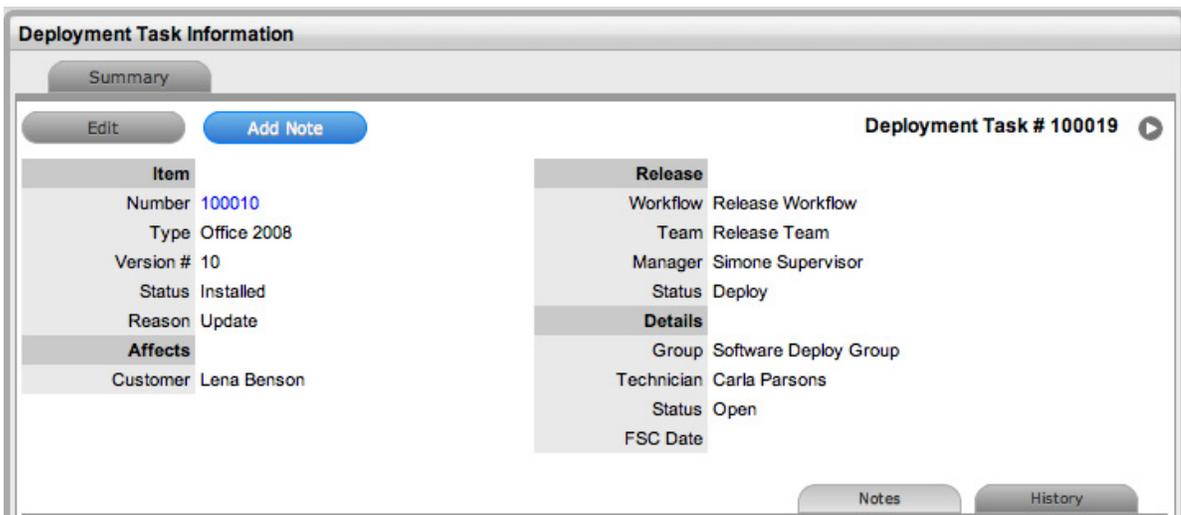
The Deployment activities created within the Deploy tab of the Release are listed in the Deployments and Deployment Tasks tabs of Change in the system. The Release Manager works the Release through the assigned workflow within the Details tab of the Release. When the Status of the Workflow is set to the Deploy State defined within the Deployment, the Tasks will move from Pending to Open.



For this example, within the Releases>Release#>Details tab the Release Manager has moved the Release through the Workflow States of Plan, Plan Approval, Build, Test and is currently assigned the State of Deploy Approval. Selecting Accept will move the Release to Deploy, and the associated Tasks will automatically move to Open.



Within the Change > Deployment Tasks tab, Technicians can edit Deployment Tasks by adding Notes using the New Note button, which are stored in the Notes tab, or update the Status of the Task to Closed-Resolved. When all Deployment Tasks are completed, the Deployment is automatically closed by the system. When all Deployments are closed for a Release, the Release Manager can close the Release within the Details tab, by moving the Release Workflow Status to the Exit State.



Item details in the CMDB are also automatically updated, based on the information included in the Release.

The screenshot shows a web interface titled "Item Information". At the top, there are several tabs: "Information", "Details", "Costs", "Requests", "Relationships", "Outages", and "AMIE Snapshots". Below these tabs are three buttons: "Edit", "Duplicate", and "Print". To the right of these buttons, it says "Item # Service Desk (Service Desk)".

The "Details" tab is selected, and it contains two columns of fields. The left column has "Business Unit", "Type", and "Environment". The right column has "Date Responsible", "Date Activated", and "Contact".

Below the fields, there are four more tabs: "Description", "Notes [1]", "Attachments [2]", and "Audit Trail". The "Description" tab is active, showing a text area with the text "Description entered here is displayed in the customer portal." At the bottom right of the interface is a "Done" button.

Example 2: Update Microsoft Exchange

Although this is considered a less complex activity as it involves only one Item, due to the business critical nature of Exchange the risk is higher. Therefore, as a Release Manager, it has been decided to manage this Release using Change Control. To manage Deployments using Change Management, ensure the Administrator has enabled the Control Deployments via RFC option in the Setup>Privileges>Requests Tab.

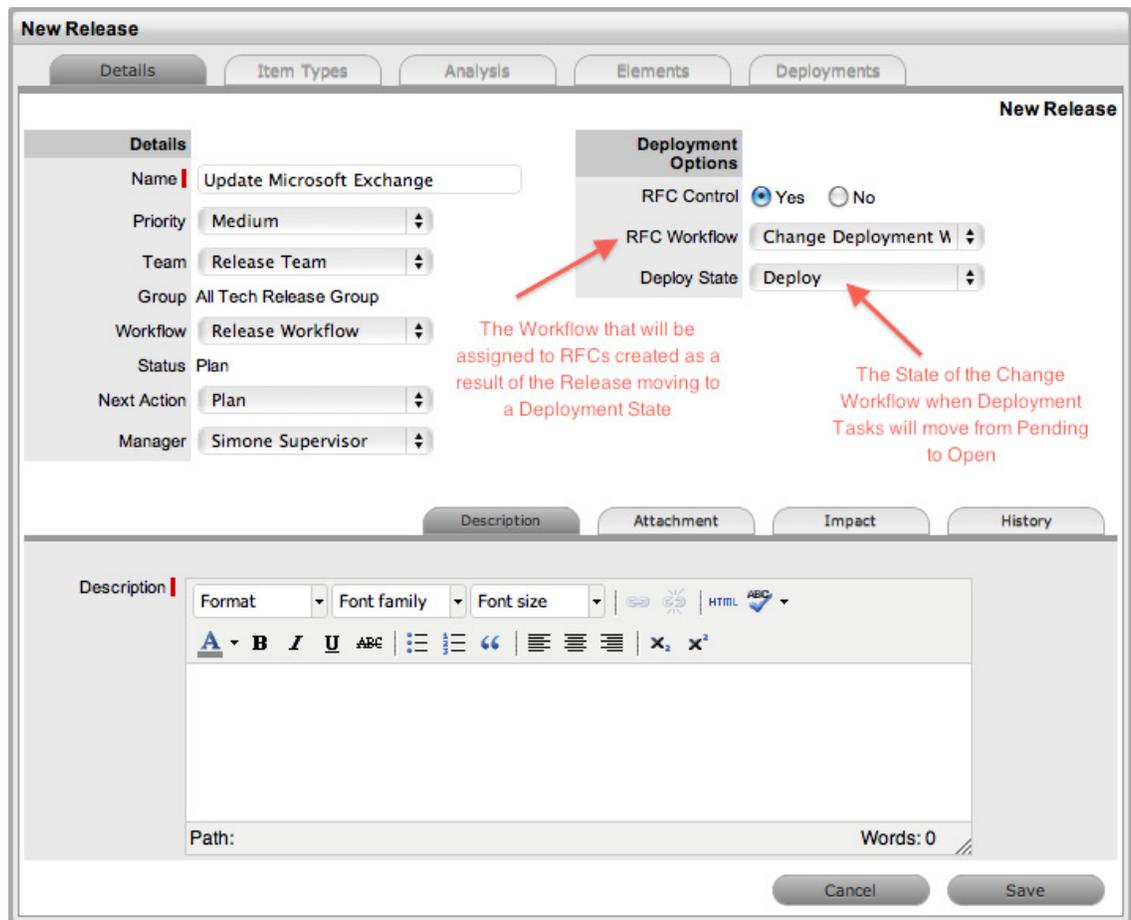
Release Objective: To update Exchange to Microsoft Exchange 2010

The example will apply the system default Release Workflow that includes an added Workflow State of Trial Deploy and also has a number of Approval States. It includes Deploy and Trial Deploy States, as the stages of the Workflow where the related Change Requests (RFCs) are automatically created for the Deployment, and only when the RFCs hit the Deploy State configured for the RFC Control within the Details tab of the Release do the Deployment Tasks become active. The Change Manager can view all Deployment Tasks related to the RFC within the RFC Summary screen, and when all Tasks are moved to Closed-Resolved the Change Manager can close the related RFC.

The Release Team that will action the Deployment Tasks has also been broken down into three groups, Software, Hardware and all Deployment Technicians.

To create a Release with the Deployment Control managed by Change Management:

1. Define the settings within the Details Tab and set the RFC Control option to Yes



2. Click Save

From the above screen snap, we can see that Simone Supervisor is the Release Manager assigned to the Release and that the Release is of low Priority, will be handled by the Release Team and managed using the Release Workflow. The Release is currently in the default entry point of the Release, the Plan State. It should be noted that moving through the Release Workflow is determined by your organization's business processes and the defined Workflow. The system is to be used as a central repository to manage Releases and a point of reference to keep all relevant parties updated regarding a Release.

3. Move to the Item Types tab

4. Click Edit

5. Select Add and set the Reason to Update

6. Within the Find Item Type field, search for Exchange

7. Click on the Exchange link to add it to the Release

8. Upload Media Attachments, if relevant

If an electronic upgrade file is to be used for the upgrade, it can be uploaded within the Media Attachment field. This would then be made available within the Deployment Task associated with the Release.

9. Enter information that is to be updated on the Details tab of the Item being updated

These will automatically be updated in the CMDB when the Deployment Task moves from Open to Closed-Resolved.

Release - Update Microsoft Exchange

Details **Item Types** Analysis Elements Deployments

Details

Item Type Exchange

Reason Update

Media Attachment

Fields

Location

Environment

Version # 2010

License Key

License Count

License Expiry

Ownership

Order #

Supplier

Supply Date

Find Item Type (Name)

Cancel Save

10. Click Save and Save again.
Move to the Analysis Tab.

Associating RFCs with the Release

Within the Analysis tab, the Release Manager can access a list of existing RFCs that are yet to be associated with the Release. To add an existing RFC to the Release, the checkbox is marked next to the Request # link, and the Add button is clicked. The RFC no longer appears in the Analysis tab, and is now visible in the Elements tab, where it can be removed if the association was made in error.

For this example, it is assumed no relevant RFCs exist in the system, so we move to the Deployments tab where the RFC will be created as a result of the Deployment.

To create the Deployment:

1. Select the Deployments tab inside the Release information screen
2. Click New

The screen expands to show the options for the type of deployment to be created, the list of Customers who own an Item associated with the Item Types included in the Release Types tab and the Search Options box.

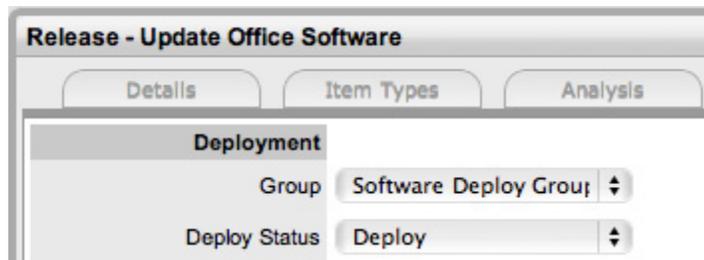
3. Select the type of Deployment that is to be created

For this example, a per Org. Unit Deployment will be created as the Item associated with the Release has shared ownership. When selected, the Organizational Unit associated with the Item that uses the Item Type associated with the Release is displayed in the Org. Unit. list.



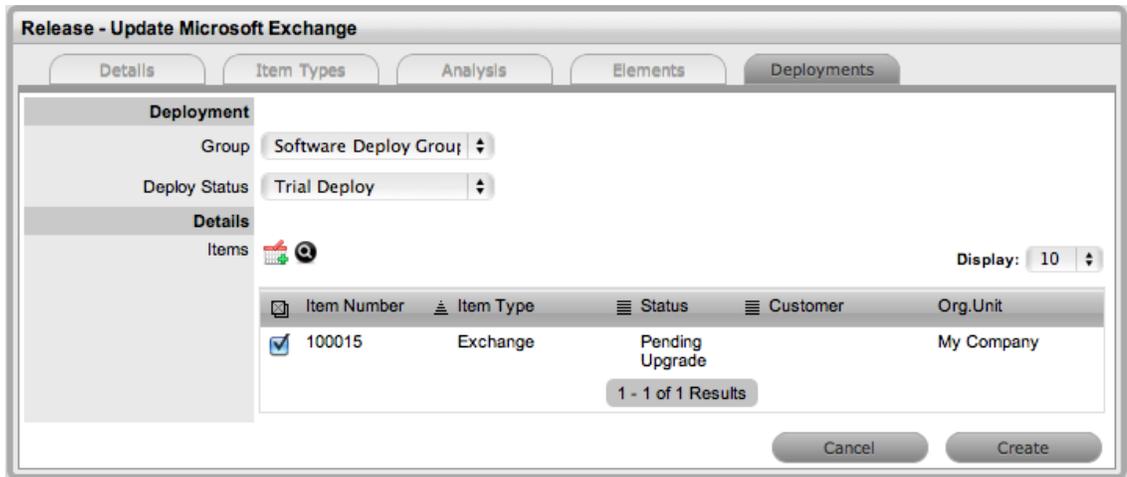
4. Assign the Org. Unit by selecting the field next to the Org. Unit name and clicking . The selection is included in a Selected Org. Units window to the right of the main window. The group of Technicians who will action the Tasks and the Workflow State where the RFC will be created to manage the Deployment must be defined.
5. Click Next
6. Select the Group of Technicians who will work on the Deployment Tasks from the Group drop-down list

For this example the Software Deploy Group of Technicians will be assigned.

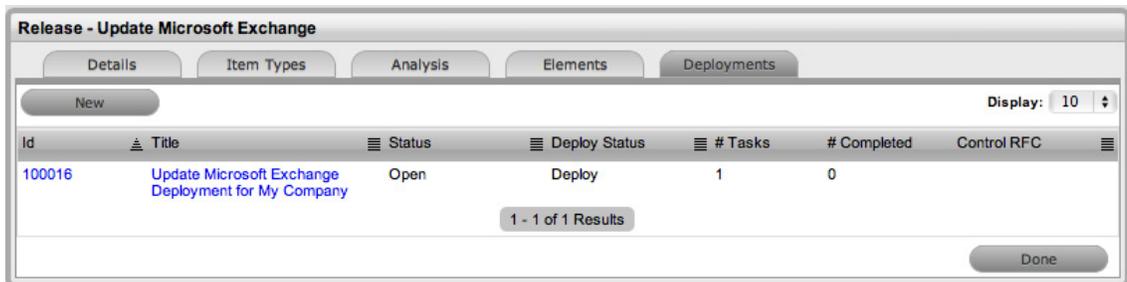


7. Assign the stage of the Workflow where the RFC will be created for the Deployment. When the Release Workflow moves into the Deploy State, for this example, an RFC will be generated. This RFC will be assigned the Change Deployment Workflow and be assigned to the Change Team. When the RFC is assigned the Status of Deployed the Deployment Task will move from Pending to Open, allowing the Team member from within the Software Deploy Group of the Release Team to action the Deployment Task.
8. Select the Item Type to be upgraded in the Deployment

If an Item Type is not displayed in the list, click  to search the CMDB.



9. Click .
The selection is displayed in the Select Items window to the right of the main window. If an incorrect assignment has been made, click .
10. Click Create



11. Click Done.
All Tasks are now saved with a Status of Pending assigned. When the Release Workflow moves to the Deploy State an RFC will be created. When the RFC hits the Release's RFC Control Deploy State the Tasks' Status will automatically be updated to Open, prompting Technicians to complete the Deployment Tasks and move the State to Closed-Resolved. When all Tasks are completed and moved to Closed - Resolved, the Release will be automatically Closed.

RFC Creation and Management

The Release Manager moves the Release through the lifecycle of the Workflow as activities are completed. For this example, within the Releases>Release#>Details tab the Release Manager has moved the Release through the Workflow States of Plan, Plan Approval, Build, Test and is currently assigned the State of Deploy Approval. Selecting Accept will move the Release to Deploy, and an RFC will automatically be created.

Change Request Information

Customer Contract Analysis Summary Notes Attachments Impact Audit Trail

Add Note Print Change Request # 100078

Details

Title

Customer Vamsi Krishna

Item Number 100026

Type Iphone 6

Classification General

Urgency Moderate

Impact Moderate

Priority Medium

Assignments

Escalation On Off

Escalation Layer

Technician Ingo Engels

Notification

Customer Email Customer

Customer CCs

Technician Email Technician

Technician CCs

Change Request

Team Change Management Team

Workflow Typical Change Workflow

Status Pending - No Contract

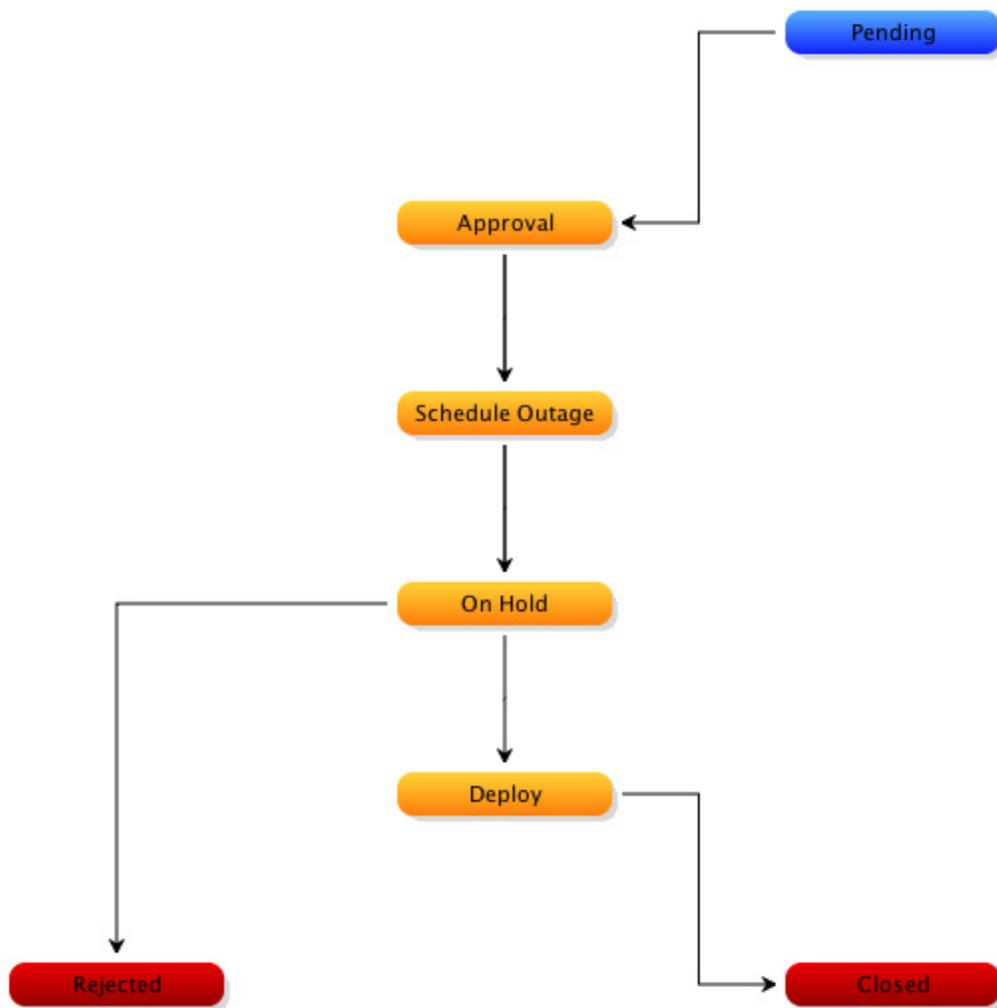
Cancel

Subject A

Description A

Cancel Done

From the above RFC, we can see that the Change Team has been assigned the RFC, and they will move the Request through the Change Deployment Workflow.



This Workflow includes the stages of Pending>Approval>Schedule Outage>On Hold>Deploy>Closed. When the RFC is assigned the Deploy State, the Deployment Tasks created in the Release, and now available in the Change>Deployment Tasks tab, will move automatically move from Pending to Open, and the assigned Technician can action the Task before moving the Deployment Task State to Closed - Resolved.

Deployment Task Information

Summary

Deployment Task # 100024

Item		Release	
Number	100015	Workflow	Release Workflow
Type	Exchange	Team	Release Team
Version #	2007	Manager	Simone Supervisor
Status	Pending Upgrade	Status	Deploy
Reason	Update	Details	
Affects		Group	Software Deploy Group
Org. Unit	My Company	Technician	Carla Parsons
		Status	Closed - Resolved
		Next Status	Open
		FSC Date	

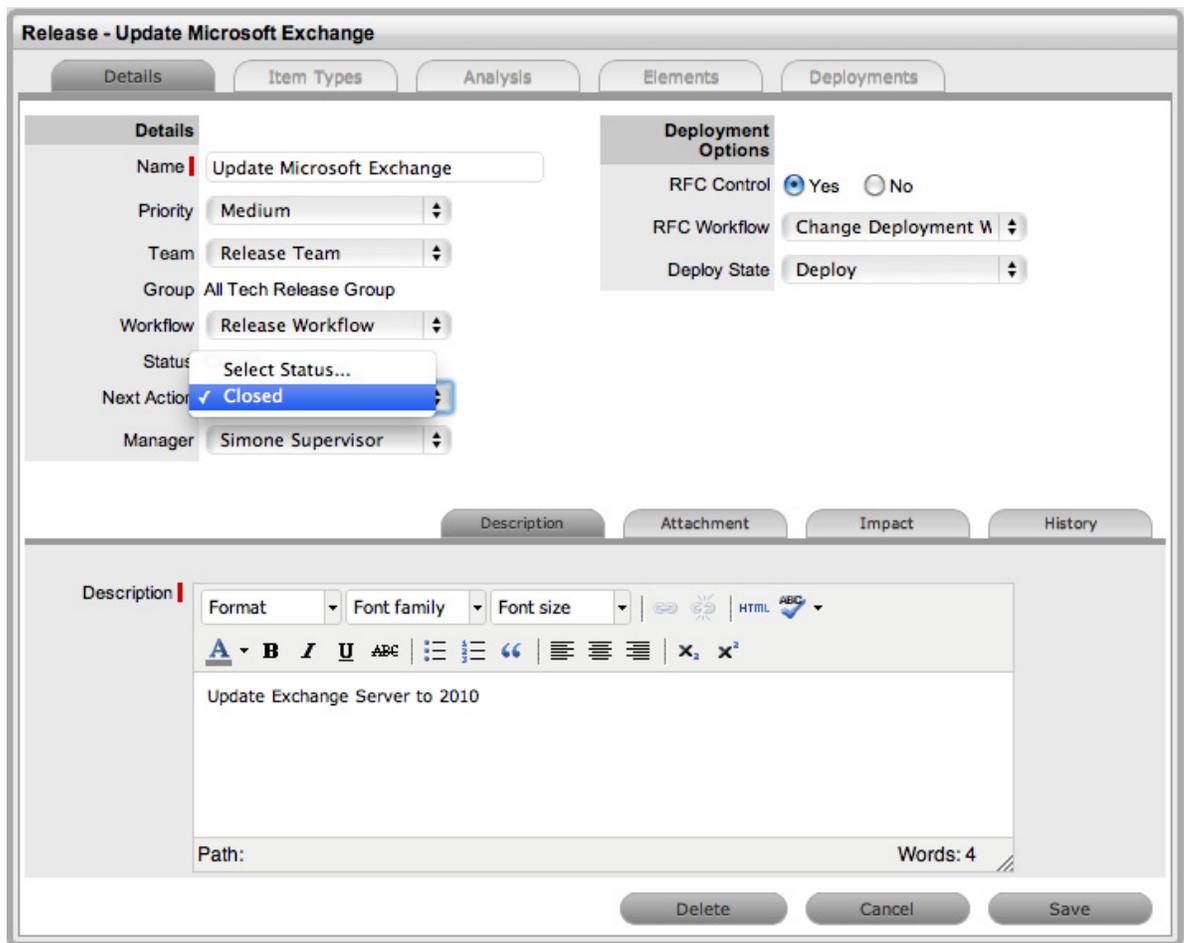
When the Task Status is set to Closed-Resolved, the updated Details contained in the Release will automatically be updated on the relevant Item in the CMDB. The Change Manager can view all Deployment Tasks related to the RFC within the RFC Summary screen, and when all Tasks are moved to Closed-Resolved the Change Manager can close the related RFC. When the Deployment Task is completed, the Deployment within the Change > Deployments tab is automatically closed by the system.

Deployment - Update Microsoft Exchange Deployment for My Company

Details Tasks

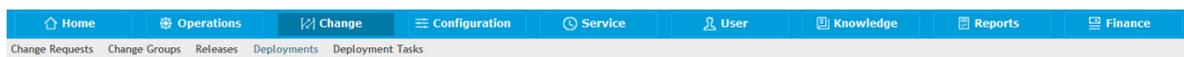
Name	Update Microsoft Exchange Deployment for My Company
Release	Update Microsoft Exchange
Group	Software Deploy Group
Deploy Status	Deploy
Priority	Medium
Status	Closed - Resolved
Control RFC	100025

When the Deployment is closed for a Release, the Release Manager can close the Release within the Details Tab, by moving the Release Workflow Status to the Exit State.



2.5.7 Deployments

Deployments



Deployments are the grouping of one or more Deployment Tasks that are generated as part of a Release.

Users who are assigned the Change Process of Release are provided access to the Release, Deployments and Deployment Tasks sub-menu options within Change. These Users can oversee the Release process and also action Deployment Tasks, as required.

The Deployments screen provides Users with a complete list of Deployments created within Releases and allows the Manager to update Deployment information, such as Deployment Priority, Group and Attachments, as required.

By default the List View includes the Deployment Title and number of Tasks associated with Deployment.

The filter view includes the options of Active and All Deployments. The list can be re-sorted by clicking on a column header and the number of Deployments displayed per batch, can be altered using the Display pop-up option.

Deployment #	Title	Start Date	Close Date	Status	Priority	Deployment State	Target Release	# Tasks	Description
100012	Multiple Item Request created by Sankar R	01/12/16 16:59		Open	Medium			4	A
100011	Problem #100056	01/12/16 15:13		Open	Medium			1	A
100010	Problem #100054	01/12/16 14:49		Open	Medium			1	A
100009	G1	01/12/16 12:39		Open	Medium			4	Group 1 description.

Within this screen, Users can search Deployments and output information in PDF and Excel format.

Deployment Details

To view information regarding a Deployment:

1. Select Change>Deployments
2. Click on the Deployment# link
3. Click Edit

Deployment - Rollout Printers Deployment for Yellow

Details | Tasks

Name: Rollout Printers Deployment for Yellow

Release: Rollout Printers

Group: Software Deploy Group

Deploy Status: Deploy

Priority: Medium

Status: Open

Description | Attachments | History

Description: Rollout Printers Deployment for Yellow

Words: 5

Delete | Cancel | Save

The following information is displayed:

Deployment Fields	Description
Name	By default the Deployment Name combines the Release Name and name of the Deployment Target, be that a specific Customer, Org. Unit or Everyone. If warranted, edit the Name as required.
Release	Shows the name of the Release associated with the Deployment.

Deployment Fields	Description
Group	Show the Group of Technicians assigned to action the Deployment Tasks.
Deploy Status	Shows the Release Workflow State assigned as the "Deployment" State, that is the stage of the Workflow when the Deployment Tasks move from Pending to Open, allowing the Technician to work on the Task. For Deployments controlled by Change Management, this is the State defined in the Release that RFCs are created to control the Deployment.
Priority	Shows the assigned Priority of the Release, which will correspond to the target timeframes for the SLAs associated with the Release via the RFCs. Adjust as required.
Status	This shows assigned State of the Deployment Tasks. The options are Pending, Open and Closed-Resolved.
Control RFC	The Change Request number associated with the Deployment is displayed as a link and allows the User to view the RFC by clicking the link.
Description	Shows the information entered that describes the goal of the Release. Adjust, if required.

4. Upload any attachments, if relevant
5. Click Save to record changes or Delete to remove the Deployment and erase all related Deployment Tasks.

Attachments

The Attachments tab allows the Manager to upload any relevant files, but also provides access to any Media Files that are associated with Deployments.

To add Attachments to a Deployment, within the Deployment's Details tab:

1. Click Edit
2. Select the Attachment tab
3. Click New

4. Browse and select a file
5. Enter a Description, if required
6. Click .

History

The History tab records all changes and updates for the Deployment, relative to the assigned Workflow State. To view a historical entry within the Deployment Details tab:

1. Select the History tab

No.	Date	Note	Status	Priority	By
31	01/13/16 14:47	Change Request 100078, Change Request 100077 have ...	Open	Medium	Sankar R
30	01/13/16 14:46	Change Request 100061 has been removed from the Gr...	Open	Medium	Sankar R
29	01/13/16 14:42	Change Request 100079 has been added to the Group	Open	Medium	Sankar R
25	01/12/16 16:59	Group 100012 created as a container for multi-item...	Open	Medium	Sankar R

1 - 4 of 4 Results

2. Click on the identification number hyperlink to display the entry details.
3. Click Cancel

The expanded window is closed.

Deployment Tasks

The Tasks tab lists all Deployment activities related to a Deployment. The User can add and remove Tasks within this tab, when the Deployment is not assigned a State that is configured as a Deployment Active State. They can also update the assigned Technician and Status, when the Tasks are in a Deployment Active State, of multiple Tasks by using the Bulk button.

To add Tasks to a Deployment group:

1. Go to Change >Deployments
2. Select the Deployment # link

The Deployment must not be in a Deployment Active State.

3. Move to the Tasks tab

Task #	Status	Technician	Customer	Org. Unit	Item No.	Item Type	Category
<input type="checkbox"/> 100027	Pending	Calvin Johns		My Company - Yellow	100017	HP Pro 8500A	Printers & Scanners

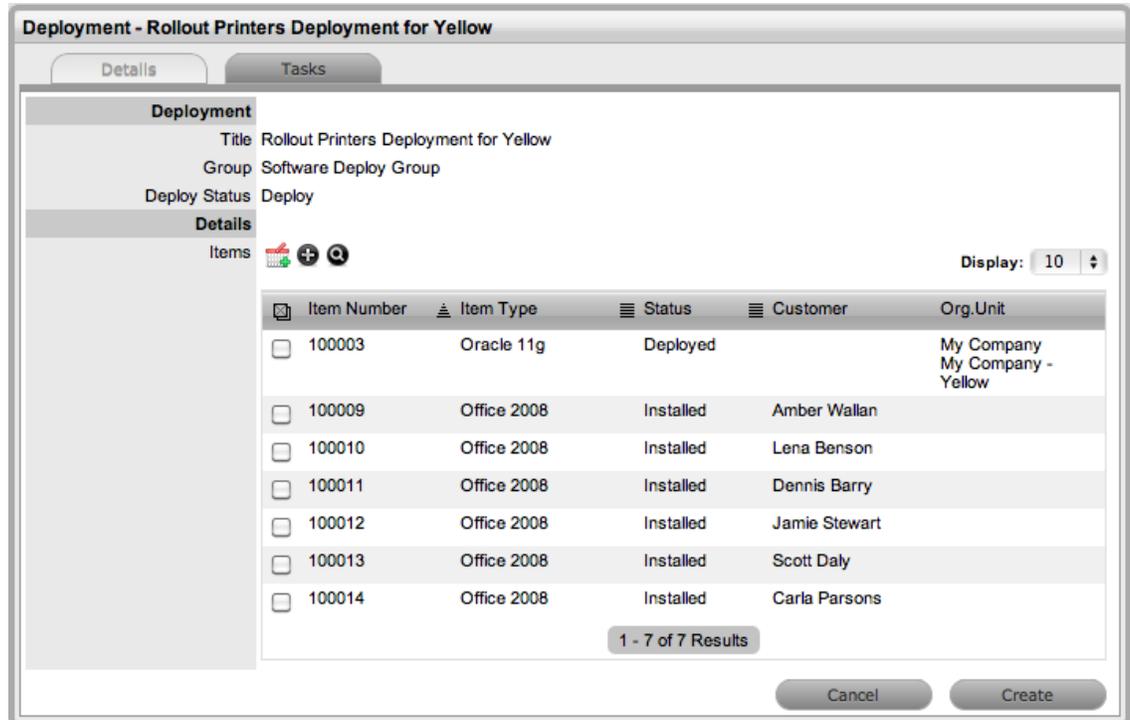
1 - 1 of 1 Results

Done

4. Click



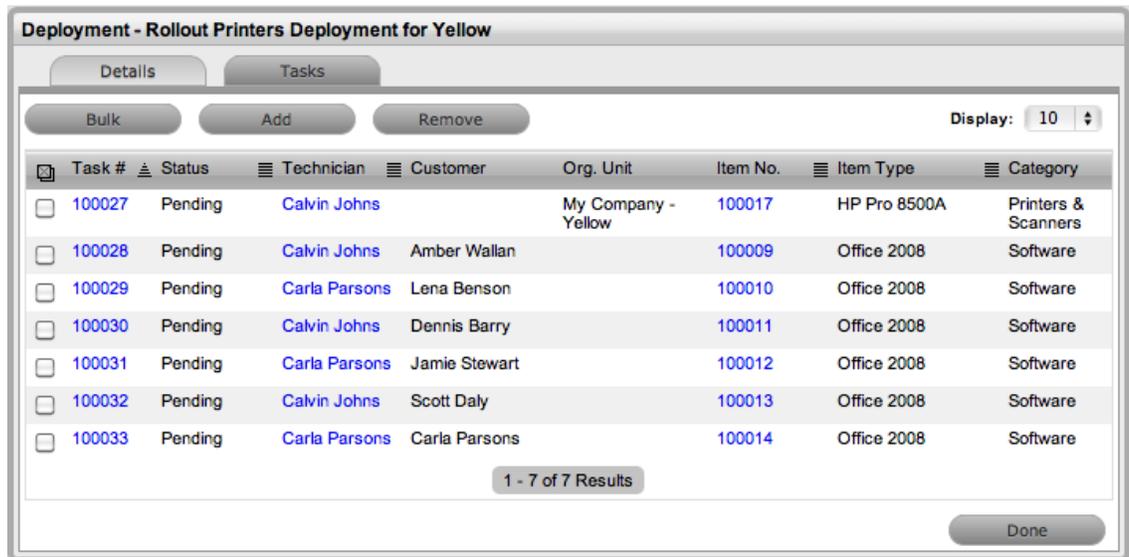
The Item options are displayed for adding Tasks.



5. Tick the relevant Deployment targets in the list, for Customer or Org. Unit Deployments
6. Click 
The selections are added to the Deployment
7. Click Create
8. Select Done.

To remove Tasks from a Deployment group:

1. Go to Change >Deployments
2. Select the Deployment # link
The Deployment must not be in a Deployment Active State.
3. Move to the Tasks tab



4. Check the boxes of the Tasks to be removed

5. Click **Remove**.

To bulk update the Technician or Status:

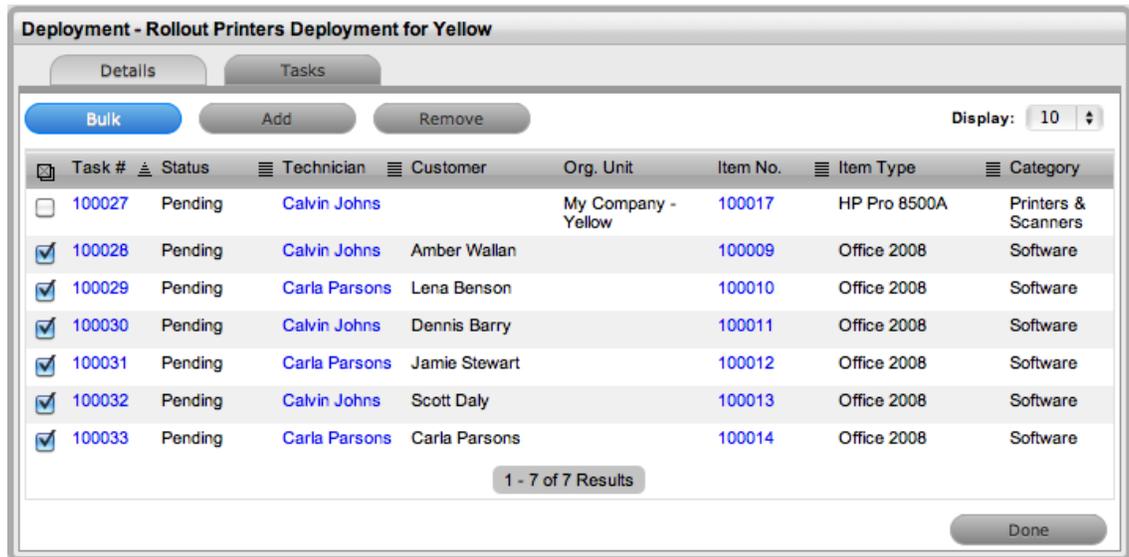
1. Go to Change >Deployments

2. Select the Deployment # link

The Deployment must not be in a Deployment Active State.

3. Move to the Tasks tab

4. Check the boxes of the Tasks to be updated



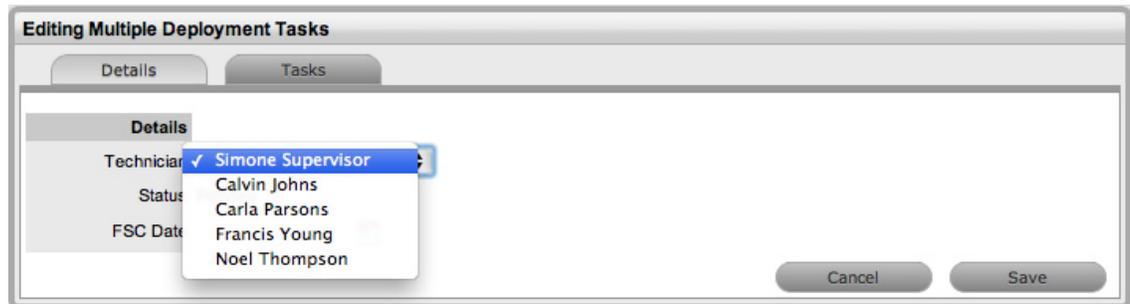
5. Select



The screen defaults to an Update screen, providing access to Technician and/or Status drop-down options.

6. Make the required change

For Status updates, the options will be Open and Closed-Resolved. If all Tasks are Open, the only option displayed will be Closed-Resolved. If the Tasks have a mix of the two States, then Closed-Resolved and Open will be listed as Status options.

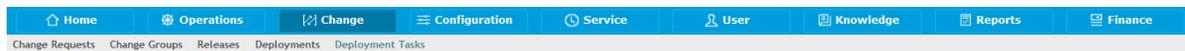


7. Click Save.

To review examples of Release and Deployments, refer to [Release Management Applied](#).

2.5.8 Deployment Tasks

Deployment Tasks



Deployment Tasks are the activities that are completed as part of a Release, for specific Customers, Organizational Units or Everyone when adding a new Item, or updating or replacing an existing Item in the CMDB.

Users who are assigned the Change Process of Release or Deployment are provided access to the Deployment Tasks sub-menu option within Change. These Users can view, and action Deployment Tasks as configured within the Release Team.

The Deployment Tasks tab lists Tasks created within a [Release](#) and Users can search Deployment Tasks and edit Tasks that are assigned to them. Tasks can also be exported in PDF or Excel format.

The Deployment Tasks tab defaults to show active Tasks logged in the system. This view can be filtered to show:

- ◆ Active Deployment Tasks
- ◆ All Deployment Tasks
- ◆ My Deployment Tasks.

The list can be re-sorted by clicking on a column header and the number of Tasks displayed per batch, can be altered using the Display pop-up option

Working with Deployment Tasks

Releases can have multiple Deployments that are to be completed at different stages of a Release lifecycle, and to allow for this, multiple stages of the Release Workflow can be defined as Deployment States when creating a Release Workflow. The different Deployment States can be selected as the Deploy Status for a Deployment when a Release is created in the system. Then, as the Release Manager moves through the Release Workflow, by adjusting the Next Action State in the Details tab of the Release, and when a State that is assigned as the Deploy Status for the Deployment is assigned to the Release, the Deployment Tasks move into an active Open State.

When a State that is assigned as a Deploy Status is selected for the Release, the Deployment Tasks for that Deployment created within the Release move to Open and can be actioned by the assigned Technicians. However, if the Control Deployment via RFC is enabled, when the Release moves into the Deployment State, RFCs are automatically created for the Deployment, and only when the RFCs hit the Deploy State configured for the RFC Control within the Details tab of the Release do the Deployment Tasks become active. The Change Manager can view all Deployment Tasks related to the RFC within the RFC Summary screen, and when all Tasks are moved to Closed-Resolved the Change Manager can close the related RFC.

When all Deployment Tasks are completed, the Deployment is automatically closed by the system. When all Deployments are closed for a Release, the Release Manager can close the Release within the Details Tab, by moving the Release Workflow Status to the Exit State.

To edit or process a Deployment Task:

1. Select Change > Deployment Tasks
2. Select the relevant Deployment Task # link

Only Users associated with the Group assigned to the Task can edit or add details to the Task.

The screenshot displays the 'Deployment Task Information' interface for task # 1000105. It features a 'Summary' tab with 'Edit' and 'Add Note' buttons. The task details are organized into sections: 'Item' (Number: 100008, Type: HP Printer, Status: Arrived, Reason: Update, Media: Printer Images), 'Affects' (Org. Unit: Pink), 'Release' (Workflow: Release Workflow, Team: Release Team, Manager: Simone Supervisor, Status: Deploy), and 'Details' (Group: Deployment Group, Technician: Scott Daly, Status: Open, FSC Date). At the bottom, a 'History' table shows two entries: one where the status changed from Pending to Open on 05/04/12 at 14:22 by Simone Supervisor, and another where the task was created in a Pending state at the same time by Simone Supervisor. A 'Done' button is located at the bottom right.

Date	Status	Action	By	Note
05/04/12 14:22	Open	Status changed from Pending to Open.	Simone Supervisor	
05/04/12 14:22	Pending	Deployment Task created.	Simone Supervisor	

3. The Summary includes the following information:

Tasks Fields	Description
Item Number	The number used to identify the Item in the CMDB. Click the link to view the Item Details.
Type	Details the Item Type of the Item.
Status	Shows the stage of the Item Lifecycle applied to the Item at the point of deployment.
Reason	Defines if the deployment is to create a new Item, update or replace an existing Item.
Affects	Lists the Customers, Org. Units affected by the Deployment Task. If it is Global Deployment, the field will state Everybody.
Workflow, Team	Shows the Release Workflow and Team assigned to the Release.
Manager	Includes the Release Manager's name.
Status	Shows the current State of the Release.
Group	Indicates the group of Technicians assigned to Deployment Task.
Technician	Shows the assigned Technician, but if multiple Technicians are in the Group, provides a drop down list of all Technicians. The Task can be reassigned here, if required.
Task Status	<p>Indicates the current assigned State for the Deployment Task. The options are:</p> <ol style="list-style-type: none"> 1. Pending: Inactive State 2. Open: Active and actionable State 3. Closed-Resolved: Exit State. <p>When the Release Workflow is an non-Deploy State, the Task will be locked at Pending. When the Release moves to a Deployment State, the Task automatically moves to Open.</p>
Next Status	Allows the Technician to move the Task from Open to Closed-Resolved, when the Task has been completed.
FSC Date	This can be completed by the Technician to set the Forward Schedule Date for the Task. However, once the Task is moved to Closed-Resolved the field will be automatically populated with the Closed time and date.

4. Click Edit
Adjust information recorded in the Summary tab.
5. Click Save.

Notes Tab

The Notes tab allows Users to create Notes for updates regarding a Deployment Task. To view any Notes listed within the Notes Tab, click on the Note Number hyperlink.

Adding a Note

To add a Note:

1. Click



The Task opens in Edit mode and the new Note screen is visible

2. Enter the Note details
3. Enter Note Time

The time entered represents the amount of time accumulated to formulate the Note's content. If no additional time has been spent on the Task away from the application, leave this field blank, as the system calculates Logged Time when the request is in Edit mode.

A screenshot of a web application window showing a "Notes" tab. The window has a title bar with "Notes" and "History" tabs. The main content area contains a form for adding a note. At the top, there is a "Note Time" field with a plus/minus spinner, a value of "0", and the unit "(minutes)". To the right is a date and time field showing "06/21/11 21:25:47". Below this is a rich text editor toolbar with options for "Format", "Font family", "Font size", "Link", "Unlink", "HTML", and "ABC". The toolbar includes icons for bold, italic, underline, text color, background color, bulleted list, numbered list, quote, indent, outdent, subscript, and superscript. The main text area is empty. At the bottom left, there is a "Path:" label. At the bottom right, there is a "Words: 0" counter. At the very bottom, there are three buttons: "Cancel", "Draft", and "Save".

4. Adjust the time and date work was completed, if required
5. Click Save.

Draft Note



Use the Draft button to save an incomplete Note entry, which will be displayed in the Notes list. If the Fast Note button is selected when a draft Note has been recorded against a Task, a warning will be displayed. To continue working on a draft Note, open the request in Edit mode and select the Note No. hyperlink.

No.	Date	Note	By	Status	Minutes
6	06/21/11 21:25	Work commenced on task but was not completed due to a change of software	Simone Supervisor		0

1 - 1 of 1 Results

Audit

The Audit tab records all changes and updates for the Deployment Task and lists who they were made by. The list can be exported by selecting the export to PDF icon.

To view an audit trail entry within the Deployment Task Summary tab:

1. Select the Audit Trail tab

Date	Status	Action	By	Note
05/04/12 14:17	Open	Status changed from Pending to Open.	Simone Supervisor	
05/04/12 14:11	Pending	Deployment Task created.	Simone Supervisor	

1 - 2 of 2 Results

2. Click on the identification number hyperlink to display the entry details
3. Click Cancel.

The expanded window is closed.

To review examples of Release and Deployments, refer to [Release Management Applied](#).

2.6 Configuration

- ◆ [Section 2.6.1, “Configuration Management,” on page 522](#)
- ◆ [Section 2.6.2, “Service Portfolio Management,” on page 522](#)
- ◆ [Section 2.6.3, “Service Item Costs Tab,” on page 527](#)
- ◆ [Section 2.6.4, “Service Catalog,” on page 533](#)
- ◆ [Section 2.6.5, “Items Tab,” on page 537](#)
- ◆ [Section 2.6.6, “Item Types,” on page 560](#)
- ◆ [Section 2.6.7, “Create a Manufacturer,” on page 573](#)
- ◆ [Section 2.6.8, “Categories Tab,” on page 578](#)
- ◆ [Section 2.6.9, “Vendors,” on page 601](#)
- ◆ [Section 2.6.10, “Manufacturers,” on page 603](#)
- ◆ [Section 2.6.11, “Outages,” on page 605](#)
- ◆ [Section 2.6.12, “AMIE Snapshots,” on page 610](#)

2.6.1 Configuration Management

The objective of Configuration Management is to provide a logical model of the IT infrastructure. It identifies, controls, maintains and verifies the versions of all Configuration Items (CIs) that form an organization's IT infrastructure.

The fully embedded Configuration Management Database (CMDB) provides access to up-to-the-minute information regarding the state of any infrastructure item. It includes:

- ♦ Fully customizable Configuration Item Templates
- ♦ Configuration Item Lifecycles
- ♦ Problem Classifications.

The power of the CMDB is obtained by the quality and details of the CI relationships stored within it, which can be used by the Service Catalog. The Service Catalog maps the relationships between individual CIs and allows the Service Desk to assess the real impact of a loss of a service as opposed to an individual asset being off-line.

Once the CMDB has been successfully implemented, Configuration Management will help the Service Desk by:

- ♦ Reducing the time required to log a request
- ♦ Improving the accuracy of fault diagnosis and request allocation to Support Teams, thereby minimizing the overall resolution time
- ♦ Preventing outages caused by poorly planned changes by revealing the full impact and risk of any change to a CI inside the control of the CMDB
- ♦ Aiding recovery after a disaster by providing a rollback facility
- ♦ Listing the authorized software for given desktop
- ♦ Recording and reporting on previous, current and planned states of the CI.

The benefits of the CMDB are immense, especially when combined with other Service Management disciplines of Request Fulfillment, Incident, Problem, Change and Service Management.

2.6.2 Service Portfolio Management

The Service Portfolio details the commitments and investments made by a Service Provider to its customers and within the markets they service. It contains current contractual obligations, services under development and continuing service improvement programs.

The Portfolio represents all engaged resources and resources being released during the different phases of the Service Lifecycle. It includes the Service Pipeline that consists of services under development and the Service Catalog, which includes customer visible active services that have the potential to recover costs or earn profits for the Services provided.

Service Portfolio Management is a dynamic and ongoing process that covers the following stages in work practices:

- ♦ Define - list services, confirm business cases and verify portfolio data
- ♦ Analyze - maximize portfolio value, set priorities
- ♦ Approve - finalize portfolio proposal, authorize services and resources
- ♦ Charter - communicate decision and allocate resources.

The service management system includes Service Portfolio Management, with Service Pipeline and [Service Catalog](#) functionality, as part of the base product. Combining the Service Item Lifecycle stored in the embedded CMDB, with assigned Service Level Agreements and service Teams, the system enables organizations to manage their Service Offerings from strategy to design through to transition, operation and retirement.

Service Portfolio Management in the system allows organizations to create Service Categories that include business-related attributes, such as business processes supported, business owners and business users. This ensures organizations record all relevant information against the Service.

Organizations can further optimize their Service Portfolio Management by tracking and reporting on Service Offering and Service Component usage, Service Level performance and costs. This includes the functionality to calculate break-even points (B.E.P.) for offering a service, which allows support organizations to charge the appropriate cost for offering the service to their internal or external customers. This is achieved by recording of financial attributes against services, including service cost, service charges and service revenue.

The service management system SPM capability also allows organizations to easily record the technical aspects of services such as applications used, IT Owners, supporting services, dependent services, SLAs and OLAs, Contracts and Agreements by defining Relationship Maps.

Working with SPM

Using the SPM functionality, organizations can create and publish all Service Offerings throughout the Service Lifecycle, which include the phases of:

1. Services under development, that are being considered but are not yet released (Service Pipeline)
2. Services in production/operation, that would be included in the Service Catalog
3. Retired/discontinued Service Offerings.

Service Items are recorded against the different stages of the Lifecycle and easily accessed through the filter views, available within the Configuration>Items screen:

Filter	Relationship
All Items	All Items stored within the CMDB, regardless of the assigned Lifecycle State.
Hardware Catalog	All Items that use the Hardware Category Template stored within the CMDB, regardless of the assigned Lifecycle State.
Service Catalog	All Items that use the Service Category Template stored within the CMDB that are in an active Lifecycle State.
Service Pipeline	All Items that use the Service Category Template stored within the CMDB that are assigned a Pre-production Lifecycle State.
Service Portfolio	All Items that use the Service Category Template stored within the CMDB, regardless of the assigned Lifecycle State.
Software Catalog	All Items that use the Software Category Template stored within the CMDB, regardless of the assigned Lifecycle State.

Consistent with the Lifecycle model used for all Configuration Items (CIs) throughout the application, Service CIs are created using the Service Category template, with a series of Lifecycle States customized to represent the different phases a CI can transition through (i.e., inception, design, implementation, operation or retirement phases).

Within each State of the Service Lifecycle, the relevant Users included in the Service Portfolio Team can be assigned, allowing them to manage Service Item information when the Item is allocated the State.

Using the SPM Functionality

The following outlines how the SPM Team define, analyze, authorize and charter a Service Offering in the system. This is achieved as a Supervisor User with Configuration and Service Level Management privileges enabled.

To begin:

1. Create the Service Portfolio Team in the Service > Teams tab, and assign all the relevant Users
Then within the Group tab, create the work and management groups associated with the Service Lifecycle and assign the relevant Users.
2. Within the Configuration>Categories Tab, edit the existing Service Category
Duplicate and edit an existing Service Category or click New, to create a new Service Category.
3. In Edit mode, click the Service Category option and assign the Service Portfolio Team
Set field labels for the Item, including any relevant business related attributes. Save and move to the Lifecycle tab.
4. Edit the default Lifecycle, to include all the applicable States defined by the SPM Team
Some example States include requirements, defined, analyzed, approved, chartered, designed, developed, built, test, released, operational, retired.
5. Within each stage of the Lifecycle define the following State options:

	Description
Status	
Name	Enter the name of the Lifecycle State.
Active State	Stipulates if the Item is Active, when assigned this State.
Offline State	Only visible when Active is set to No. Indicates if the Item is offline and inactive. Items moved into states where this is enabled, have availability metrics calculated.
Pre-production State	Only visible for Service Category lifecycle states. Items that use this state are available within the Service Pipeline filter view of the Configuration>Items tab.
Entry Point	An Entry Point is used to indicate the start of a Lifecycle. To make the state a Workflow Entry Point, select the Entry Point checkbox. As the Entry Point is the first state, the Previous States field will be removed.

	Description
Exit Point	Select whether the state will be an Exit Point. An Exit Point is used to indicate the end of a Lifecycle.
Service Team Group	Assign a Group within the associated Service Portfolio Team, to allow these Users to edit the Item details when it is assigned this stage of the Category Lifecycle.

- Continue to configure the Category like any other Category and Save
- Within the Configuration > Types tab, create an Item Type using the Service Category.
- Assign one or more SLAs

Multiple SLAs can be associated with the Type template as it allows the User to calculate the service costs for all Items that apply the Type template but that may need to be associated with different SLAs.

- Move to the Costs tab and complete known details

Within the Costs tab, organizations can calculate the Break-Even Point (BEP) of a Service based on forecasting the number of Customers of that Service. This enables the organization to account for the per calendar month price of the Service, which is used to calculate the ongoing revenue figures within the Item Costs tab that uses the Service Type template.

Type Information						
Email Service						
Forecast Costs						
Capital	12000					
Recovery	5 years					
Recurring	400 p.c.m					
Actual Costs						
Capital	\$0.00					
Recurring	0.0 p.c.m					
Services						
SLA	Cost (p.a.)	Current Users	Forecast Users	B.E.P.	Price (p.c.m)	
Gold	\$2,000.00	17	100	\$172.67	173	

Forecast Costs

Capital	Enter the proposed total cost to be invested in the Service.
Recovery	Complete the field with the expected number of years designated to recover the costs of implementing the Service.
Recurring	Enter the proposed ongoing cost, on a per calendar month basis, for offering the Service.

Forecast Costs

Services	Using the details entered in the Costs fields and the cost per annum of the SLA, enter the forecast number of Customers/Users to calculate the break even point (B.E.P) of the Service. Using the auto-calculated B.E.P., enter a per calendar month Price for the Service to recover costs. This figure is used in the Service Item Costs tab to calculate the ongoing Revenue figures.
Actual Costs	
Capital	Content for this field is derived from the Cost field within then Costs tab of the Item created using this Type.
Recurring	Content for this field is derived from the Monthly Cost field within the Costs tab of the Item created using this Type.

10. [Create the Item](#) and assign the relevant State, which in turn associates the relevant Users included in the SPM Team.

Assign the Users and/or Org Units to set the number of affected Users, and set the appropriate SLA.

The Costs tab of a Service Item includes information related to the financial and contractual details associated with the Item. The information more specifically related to the Service Item is recorded in the Charges and Revenue fields, as this information allows service and support organizations to calculate the costs of offering a service and if appropriate, recover the costs from the customers.

Charges

Price (per user)	Draws the figure from the Service Item Type Costs tab and displays this as a daily amount. This figure is then multiplied with the number of Users/ Customers assigned to the Item, to calculate the Revenue costs.
Cost (per user)	Draws the figure from the Inherited Costs and displays this as a daily amount. This figure is then multiplied with the number of Users/Customers assigned to the Item, to calculate the actual Costs.
Revenue	
Month to Date	Uses the Charges figure, multiplied with the number or Users and days of month passed, to calculate the month to date figure.
Previous Month	A reference figure for an average monthly cost, based on the previous months revenue for the Service Item.
Availability	
Avg Repair Time	Entries displayed here are automatically calculated based on the average length of time an Item is offline.

Charges

Avg Time To Fail

Figures displayed here are automatically calculated based on the average time between an Item being moved to an offline State.

2.6.3 Service Item Costs Tab

Service Item Costs Tab

The Costs Tab of a Service Item includes information related to the financial and contractual details associated with the Item. The information more specifically related to the Service Item is recorded in the Charges and Revenue fields, as this information allows service and support organizations to calculate the costs of offering a service and if appropriate, recover the costs from the relevant parties.

As with other Item Types, the screen includes general Item details such as:

- ◆ Base cost
- ◆ Purchase date and related information
- ◆ Depreciation data
- ◆ SLA and Contract details.

The Information recorded on the Costs Tab includes:

Financial	Description
Cost	<p>The financial investment made to purchase the Item. This figure is also used when the Delegate Costs is enabled for allocating costs across related Items.</p> <p>NOTE: Typically for Service Items, the infrastructure costs would be zero as this would be derived from the associated Parent Items.</p>
Monthly Cost	<p>The amount invested on a monthly basis to maintain the running of an Item. This figure is also used when the Delegate Costs option is enabled for allocating costs across related Items.</p>
Usage Unit Cost	<p>This is used as a reference field, where the User can enter base unit cost, for example per Megabyte data charge, which can be used for calculating costs in custom reports.</p>
Purchase Date	<p>The date the Item was purchased.</p>
Depreciate Over	<p>Enter the number of years the Item is to be depreciated over, if required.</p>
Depreciated Value	<p>The system calculates the current value of the Item based on the Purchase Date and the number of years the Item is to be Depreciated Over.</p>
Audit Date	<p>Set the date the Item is next to be audited.</p>

Financial	Description
PO Number	If Purchase Orders are enabled for the system, the field is visible and automatically populated with the PO number generated by a User within the Finance>Purchase Orders tab, when the Item order was recorded in the system.
Charges	
Price (per user)	Draws the figure from the Service Item Type Costs tab and displays this as a daily amount. This figure is then multiplied with the number of Users/Customers assigned to the Item, to calculate the forecasted Revenue.
Cost (per user)	Draws the figure from the Inherited Costs and displays this as a daily amount. This figure is then multiplied with the number of Users/Customers assigned to the Item, to calculate the actual Costs.
Revenue	
Month to Date	Uses the Charges Price figure, multiplied by the number of Users and days of month passed, to calculate the month to date figure.
Previous Month	A reference figure for an average monthly revenue figure, based on the previous month's revenue for the Service Item.
Costs	
Month to Date	Uses the Charges Cost figure, multiplied by the number of Users and days of month passed, to calculate the month to date Cost.
Previous Month	A reference figure for an average monthly cost, based on the previous month's cost for the Service Item.
Inherited Costs	
Inherited Capital	Total infrastructure costs of parent CI's that directly contribute to the cost of the Service Item. This figure is derived from all the Cost fields within the Item Information>Costs tab of related Parent Items.
Inherited Ongoing	Running costs of all associated Items that enable the Service Item to continue to function. This figure is derived from all the Monthly Cost fields within the Item Information>Costs tab of related Parent Items.

Financial	Description
Delegate Costs	<p>To enable cost delegation across the relationship map allowing associated Items to inherit the costs of the current CI, select Yes. This will take the figures from the Cost and Monthly Cost fields for the Item and apply them across related Child Items.</p> <p>Define the technique to be used to evaluate the cost split:</p> <p><i>Child Count:</i> Costs are split by percentage based on the number of child CI's the costs are being delegated across.</p> <p><i>User Count:</i> Costs are split proportionally based on the number of users of the child CI's the costs are being delegated across.</p> <p><i>Custom %:</i> The relationship itself allows for the % cost to be assigned</p>
Availability	
Avg Repair Time	<p>Entries displayed here are automatically calculated based on the average length of time an Item is offline.</p>
Avg Time To Fail	<p>Figures displayed here are automatically calculated based on the average time between an Item being moved to an offline State.</p>

The figures displayed within the Availability fields are automatically calculated by the application, using the Item Lifecycle as it moves between online and offline States.

Item Information

Information Details **Costs** Requests Relationships

Edit Duplicate Print **Item # 100002 (Service Desk)**

Financial		SLA Details	
Cost	\$0.00	Service Level	
Monthly Cost	\$0.00		
Usage Unit Cost			
Purchase Date			
Depreciate Over	years		
Depreciated Value	\$0.00		
Audit Date (mm/dd/yy)			
PO Number			
Charges		Availability	
Price (per user)	N/A	Avg Repair Time	N/A
Cost (per user)	N/A	Avg Time To Fail	44 Days, 22 Hrs, 24 Mins
Revenue			
Month to Date	N/A		
Previous Month	N/A		
Costs			
Month to Date	N/A		
Previous Month	N/A		
Inherited Costs			
Inherited Capital	\$12,000.00		
Inherited Ongoing	\$150.00		
Delegate Costs	<input type="radio"/> Yes <input checked="" type="radio"/> No		

Done

Completing the Depreciate Over field allows the application to automatically keep track of the Item depreciation over the specified number of years. The current value of the Item after depreciation is displayed at Depreciated Value. The Audit Date field is used to record the date when the Item was last audited.

Billing Enabled

When Billing is enabled, a Service Level hyperlink is available within the Costs screen. This provides access to the Service Level Agreement details that govern the lifecycle for Requests logged against the Item.

Item Information

Information Details **Costs** Requests Relationships

Duplicate Print **Item # 100002 (Service Desk)**

Financial

Cost 0.00

Monthly Cost 0.00

Usage Unit Cost

Purchase Date

Depreciate Over years

Depreciated Value \$0.00

Audit Date (mm/dd/yy)

PO Number

Contract

Service Level **Gold**

Contract # 7

Start Date 05/09/11

End Date 05/08/12

Expires 11 Months 21 Days

Availability

Avg Repair Time N/A

Avg Time To Fail 44 Days, 22 Hrs, 24 Mins

Charges

Price (per user) N/A

Cost (per user) N/A

Revenue

Month to Date N/A

Previous Month N/A

Costs

Month to Date N/A

Previous Month N/A

Inherited Costs

Inherited Capital \$12,000.00

Inherited Ongoing \$150.00

Delegate Costs Yes No

Contracts

Contract #	Type	SLA	Start Date	End Date
7	Per Item	Gold	05/09/11 00:00	05/08/12 23:59

1 - 1 of 1 Results

Delete Cancel Save

If Invoices are also enabled, an Invoice Number hyperlink is available and when selected, will display the invoice details for the Contract that covers the Item. The Start Date and End Dates stipulate the contract length covered for the Item. It is summarized by the days or hours recorded in the Expires field.

The Contract tab within the Item Information Costs tab summarizes the contract details that cover the Item. Further Contract details can be found within the relevant Contract Number within the Finance>Invoices screen.

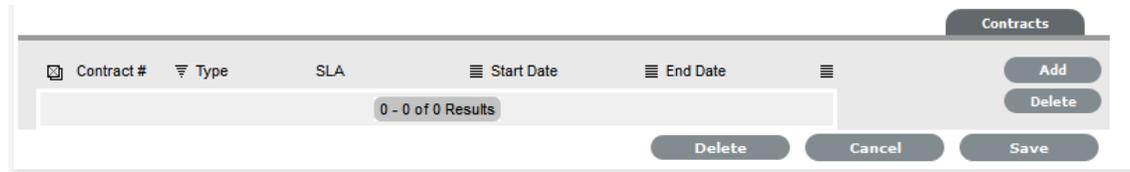
Create a Contract

Through the Item Costs tab, Contracts with an associated Invoice Number (if relevant) can be generated for an Item, after it has been logged in the system.

To add a Contract to an Item, within the Configuration>Item screen:

1. Select the Item Number
2. Move to the Costs tab
3. Click Edit

The Add and Delete button are made available within the Contracts tab



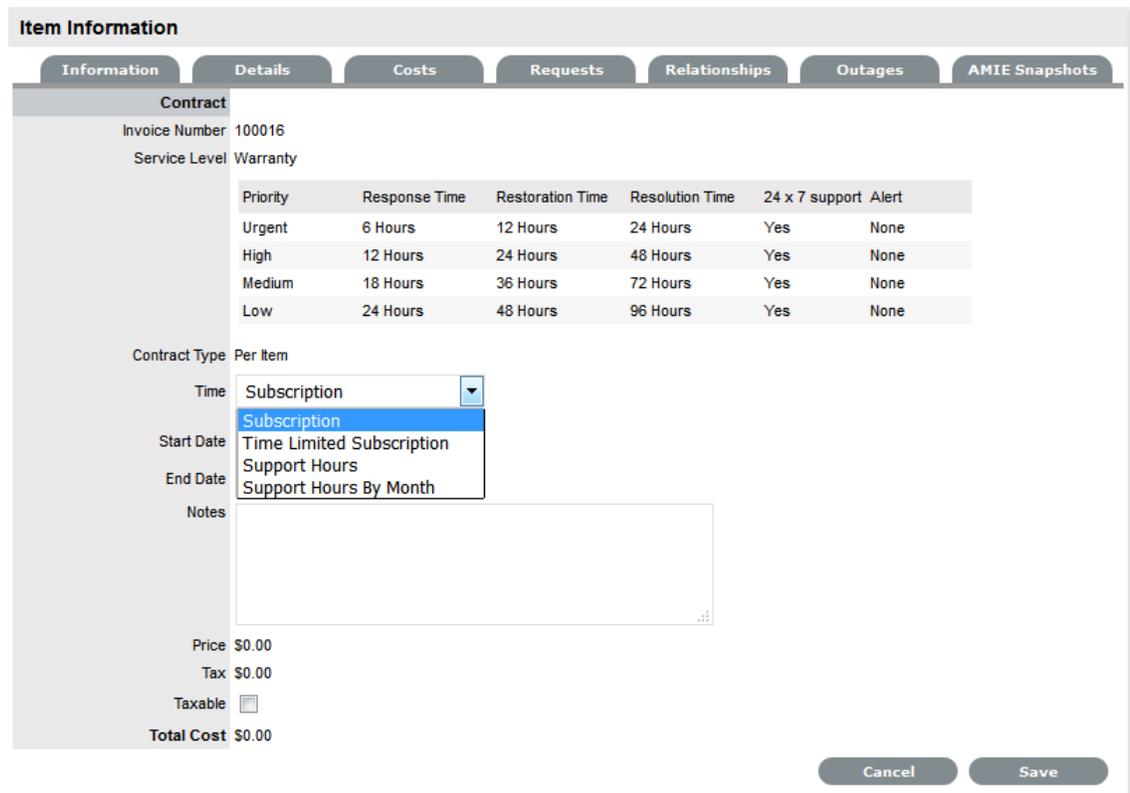
4. Click Add

(If Invoices are enabled in the system, an Invoice number will be automatically generated and assigned to the Contract).



5. Select an SLA from the drop-down option

The screen will display the SLA details and the Contract Type locked to Per Item.



6. Assign the Time period to be covered by the [Contract](#)

If *Subscription* is selected, the Start and End Dates are automatically completed by the system, but can be edited if required.

If *Time Limited Subscription* is selected, the Support Hours field is displayed and the number of support hours purchased by the Customer should be entered. Also, the Start Date and End Date fields should be completed manually, entering the length of time for the subscription period.

If *Support Hours* is selected, the number of support hours purchased by the Customers should be entered.

If *Support Hours by Month* is selected, set the number of hours purchased per month and define which day of the month contract is to rollover to start the new month. The Total Support Hours will automatically be calculated based on the Start and End Dates set for the Contract.

(If a Contract is forward dated with a Start Date set in the future, the Pending Contract status is assigned.)

IMPORTANT: Subscription - a contract that covers a specified period of time

Time Limited Subscription - a contract that covers either a specified period of time or number of support hours, whichever limit is reached first

Support Hours - a contract that defines the number of support hours covered.

7. Add any relevant Invoice Notes
8. Check the Taxable box, if the Contract is to be taxed
9. Click Save.

(If Invoices are enabled in the system, an Invoice number will be automatically recorded for the Contract and made available within Finance>Invoices.)

2.6.4 Service Catalog

The Service Catalog can be accessed as a filter view within the Items sub-menu screen of the Configuration tab. It is part of the Service Portfolio made available to Customers, displaying information regarding Live IT Services. The Service Catalog may include information about service deliverables, any associated costs, contact points, ordering and request procedures.

For an IT service organization, the Service Catalog may include the following options:

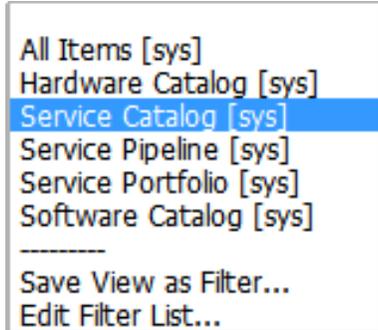
- ◆ Email
- ◆ Network Monitoring
- ◆ Security
- ◆ Video Conference
- ◆ Remote Access
- ◆ Mobile Communications (Cell Phones/PDAs)
- ◆ Wireless
- ◆ Laptop Computing
- ◆ Desktop Computing
- ◆ File Sharing
- ◆ Printing/Scanning.

Items included in the Service Catalog can be included as standalone Items or underpinned by physical Items stored within the Configuration Management Database (CMDB). Within the CMDB, relationships can be mapped between Configuration Items (Items) in the Relationships tab of an Item. This map is then available within the Impact tab of a request, to allow for the impact of a request on the Organization to be assessed.

Service Catalog Relationships are defined and visible within the Relationships tab of an Item.

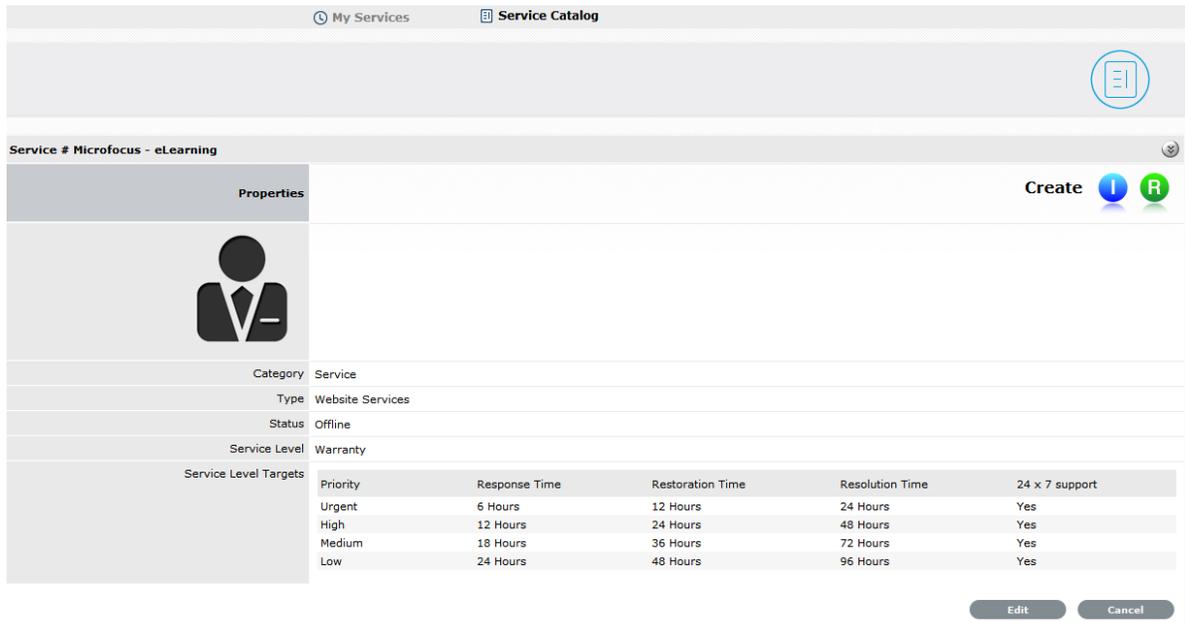
To view the Service Catalog:

1. Within the Configuration>Items tab
2. Select the Service Catalog (sys) filter



Create a Service

To create a new Service, such as Email or Printing, create an Item Type template using the Service Category Template, which has the Service Category option enabled within the Categories tab. As part of the Service Category template, define relevant attribute fields as being Customer Visible, which will display information recorded on the Details tab of the Service within the expanded view of a Service in the Customer Portal.



Then create an Item using the newly created Type template. Within the Details tab of the Service Item, complete the Description to provide information about the Service within the Customer Portal Services tab.

Item Information

Information Details Costs Requests Relationships Outages AMIE Snapshots

Duplicate Print Item # Service Desk (Service Desk)

Details

Business Unit

Type

Environment

Details

Date Responsible

Date Activated

Contact

Description Notes Attachments Audit Trail

Description

Format Font Family Font Size HTML

A **B** *I* U ABC

Description entered here is displayed in the customer portal.

Path: p Words: 8

Delete Cancel Save

Within the Item Relationship tab, define the underpinning infrastructure of the new Service Item, if relevant.

Managing Service Costs

Users with the Finance Role are able to manage the information related to Service Item Costs. Items created with the Category Template that have the Service Category option enabled, allow organizations to calculate and recover costs for offering services. At the Item Type level, the costs for offering a service can be calculated against multiple service level agreements. Within the Cost Tab of a Service Item, figures based on the Item Type associated with the Item are provided, to allow the support organization to recover costs for providing the Service.

View Service Relationships

Within the Relationships tab of the Item Information screen, a Relationship Map visually displays the connections that have been defined for an Item. All Item Relationships are listed in the Relationships Table beneath the Map. The Relationship Map can display up to 48 Child Items and 16 Parent Items in the one diagram.

The central icon of a Map is a visual representation of the selected Item. Scroll over an Item label to view any information recorded on the Information and Details tabs of the Item. To drill-down through the relationships, click on an Item icon label. To change the focus of the Relationship Map to another Item, click on the Item icon label and the system will request that OK be selected before updating the central node of the Map.

The Relationship Table data displayed at the base of the map can be filtered using the Direction filter view of Parent-Child or Child-Parent.

New Delete Print Item # Service Desk (Service Desk)

Direction: Child - Parent Display: 10

Current Item	Relationship	Related Item	Item #	Identifier	Category
Service Desk	is a child of	Windows Bundle	Microsoft 2010		Service

1 - 1 of 1 Results

The map displays the relationship between each Lifecycle State by using different colors to represent the type of Lifecycle State.

Color

- | | |
|---------------|---|
| Green Circle | CI is assigned an online status. |
| Red Square | CI is assigned an offline status. |
| Blue Triangle | Service CI is assigned a pre-production status. |
-

The Lifecycle State name can be accessed by scrolling over the Item icon within the Map.

Delete a Relationship:

To remove the Relationship between Items:

1. Select the relevant Item within the Configuration tab
2. Move to the Relationships tab
3. Click Edit
4. Select Delete

A table with the Relationship details is displayed

Item Information

Information Details Costs Requests Relationships Outages AMIE Snapshots

Print Item # srm-tst-nsd-223 (Dell Latitude E6430)

Direction: Parent - Child Display: 10

Current Item	Relationship	Related Item	Item #	Identifier	Category
<input type="checkbox"/> Dell Latitude E6430	is a parent of	Windows Bundle	Notepad++		ZENworks Bundle
<input type="checkbox"/> Dell Latitude E6430	is a parent of	Windows Bundle	Firefox 1.0		ZENworks Bundle
<input type="checkbox"/> Dell Latitude E6430	is a parent of	Windows Bundle	Microsoft 2010		ZENworks Bundle

1 - 3 of 3 Results

Cancel Delete

5. Select the Relationship Direction to display the relevant Relationship table
6. Mark the checkbox next to the Relationship that is to be removed
7. Select Delete
8. Click Done to return to the Item list.

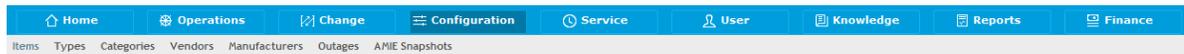
Managing the Service Catalog

The portfolio of services offered within an organization can be managed by the Service Portfolio Team.

2.6.5 Items Tab

- ♦ [“Items” on page 537](#)
- ♦ [“Bulk Item Update” on page 539](#)
- ♦ [“Item Information” on page 541](#)

Items



Configuration Items within the system are referred to as Items. Items have multiple connections with other elements throughout the application, these may include Customers, Organizational Units and Service Level Agreements. The table below outlines how Items interact with other system elements:

Element	Relationship
Customers	Each Item must be assigned to one or more Customers who are the Owners of the Item. This Customer may be Everyone, making the Item a Global Item. Only Item Owners are able to raise requests against an Item. .
Service Level Agreements (SLAs)	Service Level Agreements can be linked as follows: <ul style="list-style-type: none"> ◆ Per Item ◆ Per Customer ◆ Per Request ◆ Per Organizational Unit.
Teams	Within Item Types, Default Teams are assigned to Items. When requests are raised for an Item, they will be assigned to the Default Team.
Technicians	Technicians can be associated with Skills based on Items, Item Types and Classifications. When a request is raised with the combination of Item Type and issue Classification, it is assigned to that Technician.
Outages	Where states in the Lifecycle of an Item Type are defined as Off-line, when an Item is in an Off-line state, it will appear in the Outages page.

An Item record consists of the following attributes:

- ◆ [Information Tab](#)
- ◆ [Details Tab](#)
- ◆ [Costs Tab](#)
- ◆ [Requests Tab](#)
- ◆ [Relationships Tab](#)
- ◆ [Outages.](#)

Options available within the Items screen include:

- ◆ [New](#) - Create an Item
- ◆ [Search](#) - Search for an Item
- ◆ [Bulk](#) - Allows the User to update details of multiple Items in a single screen.

Filter views that are available within the Configuration>Items screen include:

Filter	Relationship
All Items	All Items stored within the CMDB, regardless of the assigned Lifecycle State.
Hardware Catalog	All Items that use the Hardware Category Template stored within the CMDB, regardless of the assigned Lifecycle State.
Service Catalog	All Items that use the Service Category Template stored within the CMDB that are in an active Lifecycle State.
Service Pipeline	All Items that use the Service Category Template stored within the CMDB that are assigned a Pre-production Lifecycle State.
Service Portfolio	All Items that use the Service Category Template stored within the CMDB, regardless of the assigned Lifecycle State.
Software Catalog	All Items that use the Software Category Template stored within the CMDB, regardless of the assigned Lifecycle State.

View an Item

Within the Item sub-menu option, Users can view a list of Items created within the system. To view the details of an Item, select the Item Number hyperlink and the Item Information screen is displayed. The Item Information screen includes tabs for the following information:

- ◆ Attribute details
- ◆ Relevant costs
- ◆ Requests created against the Item
- ◆ Relationships associated with the Item
- ◆ Planned Outages associated with the Item..

Bulk Item Update

Bulk Item Update

The new ownership details for multiple Items can be added using the Bulk button within the Items list view. This functionality allows Users to add one or more Customers or Organizational Units to multiple Items within one screen. If the Items have mixed ownership before the update, and these details are no longer relevant, the current ownership details need to be adjusted within each individual Item.

If Parent/Child Relationships are configured for the Items, only the Parent Items' ownership details can be updated. The related Child Items will automatically adopt the amended Parent ownership details.

Multiple Items can also be deleted using the Bulk Item button.

To update multiple Items:

1. Go to Configuration > Items

The Items List View is displayed.

2. Check the boxes next to the Items numbers that need to be updated

Item No.	Item Category	Item Type	Service Level	Customers	Org. Units	Status	Purchased	Incident Team	Problem Team	Change Team	Request Team
<input checked="" type="checkbox"/> srm-tst-nsd000c29485caa	Hardware	Def Latitude E6430	Warranty	Guruprasad S		Deployed		Device-Incident Team	Problem Analysis Team	Change Management Team	Service Request Team
<input type="checkbox"/> srm-tst-nsd-223	Hardware	Def Latitude E6430	Warranty	Sachin Kumar		Pending Upgrade		Device-Incident Team	Problem Analysis Team	Change Management Team	Service Request Team
<input checked="" type="checkbox"/> srm-tst-nsd-222	Hardware	Def Latitude E6430	Warranty	Jason Blackett		Deployed		Device-Incident Team	Problem Analysis Team	Change Management Team	Service Request Team
<input checked="" type="checkbox"/> srm-tst-nsd-125	Hardware	Def Latitude E6430	Warranty	Andy Fair		Deployed		Device-Incident Team	Problem Analysis Team	Change Management Team	Service Request Team

3. Click



The Bulk Update screen is displayed with the Details and Ownership fields available for amending. The only Owners displayed within the Ownership field, are those who are assigned ownership to all Items included in the bulk update.

Bulk Update for 2 Items

Information | **Details**

Details

Request Team: Service Request Team

Incident Team: Device-Incident Team

Problem Team: Problem Analysis Team

Change Team: Change Management Team

Status: Deployed

Criticality: Moderate

Warranty

Expires:

Ownership

Customers: **Find Customer (Last Name)**

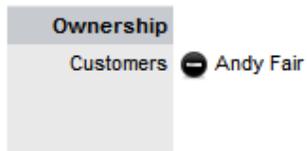
Org. Units: **Find Org. Unit (Name)**

Delete **Cancel** **Save**

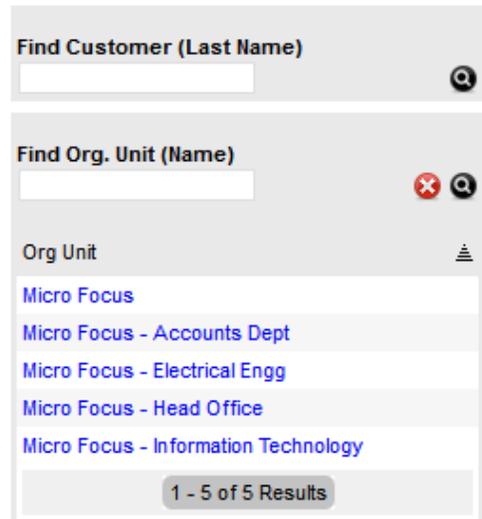
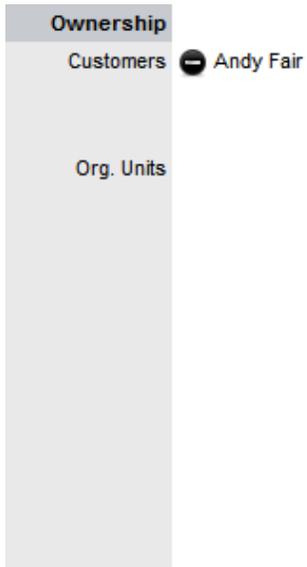
4. Amend the relevant Details

The options include Team, Status, Criticality, Warranty or Ownership for the Items, as required, or select the Delete option to remove the Items from the Items List.

5. For Items that require Ownership adjustments, click next to the Owner details if the relationship is to be deleted



6. Use the Find options for the Customer and Organizational Unit owner information to be added
Click  without entering names in the Search Fields to return a complete list of Customers or Org Units.



7. Click on the relevant new owner link within the Find box to add the owner
8. Select Save.
The Details and Ownership information of all Items are updated.

Item Information

Create an Item

When an Item is created within the system it takes the generic settings of an Item Type and binds them to a Customer or Customers and/or Organizational Unit. The Item information uses the details defined in the [Item Type](#) template, however these can be adjusted to suit the requirements of the specific Item.

To create an Item:

1. Select Configuration > Items
2. Click New

The Item Information screen appears

Item Information

Information
Details
Costs
Requests
Relationships
Outages
AMIE Snapshots

Number

Category

Type

Request Team

Incident Team

Problem Team

Change Team

Criticality

Service Level

Ownership

Customers

Org. Units

Affects 13 Users

Find Item Type (Name)

Find Customer (Last Name)

Find Org. Unit (Name)

Cancel
Next

*Denotes mandatory fields.

Item	Description
Item Number*	<p>If the Administrator has set the Item Numbers Editable option in Setup> Privileges> System to Yes, the User will have the option of entering a customized Item number. It may contain numbers and/or letters, and be between 1 and 64 characters in length.</p> <p>As no two Item Numbers can be the same, the User will be prompted to change the value they have entered if it is already in use. If the Item Number field is left blank, the system will automatically create an Item Number.</p> <p>If the Administrator has set the Item Numbers Editable option to No, an Item Number will be generated automatically and cannot be edited.</p>
Category*	This is auto-filled, based on the assigned Item Type.
Type*	This is the Item Type that the Item represents. Click the Search button to view the list of available Item Types.
Team*	This is the Technician Team that will be assigned to support the Item.
Status*	Select the status from the drop-down options displayed after the Item Type has been assigned.

Item	Description
Criticality*	Rates the degree of importance of an Item Type within an organization. The 'Impact' of a request is initially pulled from the Criticality of the Item, but can be adjusted within the request Information screen if required. Requests logged through the Customer Portal, use the Criticality of the Item to determine the Priority of the request. (See additional information below.)
Service Level	Select the Service Level Agreement from the drop-down list, if required.
Ownership	<p>These are the Customers who own the Item. A single Customer, a group of Customers or all Customers in the application can be assigned to an Item.</p> <ol style="list-style-type: none"> 1. Enter a Customer last name, or leave blank then click the Search button to view a list of all available Customers. 2. Click on the hyperlink for the relevant Customer name or names to assign them to the Item. <p>If no specific Customer is allocated to the Item, it becomes a Global Item and is assigned to Everyone.</p>
Customers	
Org Units	<p>These are the Org Units who own the Item. The Item can be assigned to one or multiple Organizational Units.</p> <p>To assign an Org Unit:</p> <ol style="list-style-type: none"> 1. Enter an Org Unit name, or leave blank then click the Search button to view a list of available Org Units. 2. Click on the hyperlink for the relevant Org Unit name or names to assign them to the Item. <p>NOTE: If Billing is enabled an owner must be assigned to the Item. The owner can be either a Customer or an Org Unit, but only Org Units that have a Primary Contact, will be displayed in the Org Unit Search list.</p>
Notification	<p>This field is visible when an active Item moves into an offline State and allows the User to define who (Primary Contact or All Owners of the Item) and how (Email or SMS), Customers will be notified that the Item is not available.</p>
Method	

3. Search and select an Item Type
4. Define a support Team for each process
5. Select the Item's Status and Criticality

(Refer below for further details about Item Criticality.)

6. Assign a Service Level

If Contracts are enabled for the system, the assignment of an SLA will result in an annual service contract automatically being applied to the Item. If an SLA is not assigned, a Contract can be created for the Item within the Costs tab.

7. Search and select a Customer and/or an Organizational Unit owner

8. Click Next to view the Details tab

Item Criticality

The Item Criticality is used to identify the degree of importance of an Item to an Organization.

When the Incident Priority is set to Derived in the Administrator Setup, the Impact of a request is mapped from the Criticality of the Item associated with the request and then combined with the selected Urgency, which derives the Priority of the request. If required, the Impact can be manually adjusted within the request Information screen. Requests logged through the Customer Portal, use the Criticality of the Item to determine the Priority of the request, which can be manually adjusted by the Technician User.

The following table displays the calculations applied by the system to the Item Criticality, which is mapped to a request's Impact to determine a request's Priority:

Impact / Urgency	Urgent	High	Moderate	Low	Very Low
Critical	1.000	0.850	0.700	0.550	0.410
High	0.850	0.723	0.595	0.468	0.349
Moderate	0.700	0.595	0.490	0.385	0.287
Low	0.550	0.468	0.385	0.303	0.226
Very Low	0.410	0.349	0.287	0.226	0.168

The above calculations result in the following Priorities:

Priority	Upper	Lower
Urgent	1	0.83
High	0.83	0.58
Medium	0.58	0.34
Low	0.34	0

The Incident Analyzer, if enabled by the Administrator in Setup>CMS>Incident Analyzer, can apply the Criticality to automatically detect Problems. The minimum Criticality level can also be used to determine which off-line Items are displayed on the Outages pages, when the Outages pages are enabled by the Administrator in Setup>Privileges>System.

Primary Contact

When multiple Customers are assigned to an Organizational Unit, a Primary Contact person can be assigned to the Org Unit. This is the preferred person that will be contacted regarding issues related to the Org Unit.

NOTE: When Billing is enabled, a Primary Contact must be assigned to the Org Unit if the Org Unit is to be allocated to an Item. If a Primary Contact has not been assigned to an Org Unit, the Org Unit will not be displayed as an option in Org Unit search results of the Item Information screen.

To assign a Primary Contact:

1. Select User>Organizational Units
2. Select an Org Unit Name

The Details tab is displayed. If Customers have been assigned to the Org Unit a Primary Contact field will be visible.

Org. Unit Information

Details Customers Technicians Items Requests Contracts

Information

Name My Company

Org. Unit Type Company

Org. Unit Code

Address 1

Address 2

City

Zip

Country

Phone

URL

Email

Notes

Handshaking

Override Yes No

Partner

Customer of

Cancel Save

3. Within the Details tab, click Edit

The Find Customer box is displayed. (Note that this search is only visible when Customers have been assigned to the Org Unit)

Primary Contact

Find Customer (Last Name)

4. Search for the Customer

To view all available customers click Search without entering a customer last name in the search field

5. Click the Customer name to assign them as the Primary Contact
6. Click Save.

Details Tab

Once the basic information for an Item has been completed, additional details can be defined for the Item. The Details tab displays a list of custom fields set for the Item's Category. The information to be completed within this section is configured by the Supervisor when customizing the Item Type templates in Configuration > Categories. Fields marked as Required, must be completed for the Item Details of the Item to be saved successfully.

Item Information

Information Details Costs Requests Relationships Outages AMIE Snapshots

Edit Duplicate Print Item # Service Desk (Service Desk)

Details

Business Unit
Type
Environment

Details

Date Responsible
Date Activated
Contact

Description Notes Attachments Audit Trail

Description Description entered here is displayed in the customer portal.

Done

Clicking Save at the far bottom of the page after the Details tab has been completed, will create the Item and save it to the database.

NOTE: Items can be duplicated at any time by clicking the Duplicate button. A new Item is created with properties that are identical to the original Item (with the exception of the Item Number, as this must be unique and is generated automatically).

Item Description

Content entered in the Description field is made available on the Customer Portal in the expanded information window of an Item. For Service Items included in the Service Catalog tab of the Customer Portal, information about the Service can be included within the Item Description field. The Service Item information can be further defined by completing Item attribute fields that are configured as Customer Visible within the Category Information screen, and therefore also displayed in the Customer Portal.

To add an Item Description, within the Item's Details tab:

1. Click Edit
2. Move to the Description tab
3. Add information in the Description field

Description

Format Font Family Font Size HTML

A **B** *I* U ABC

-

-

“ **≡** **≡** **≡** **x** **x²**

Used by the admin department to provide payroll and HR software.

Path: p Words:11

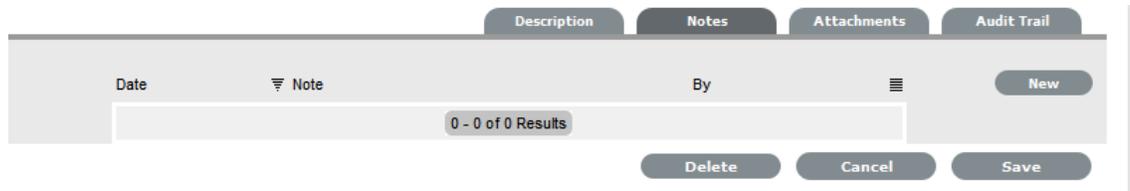
Delete Cancel Save

4. Click Save.

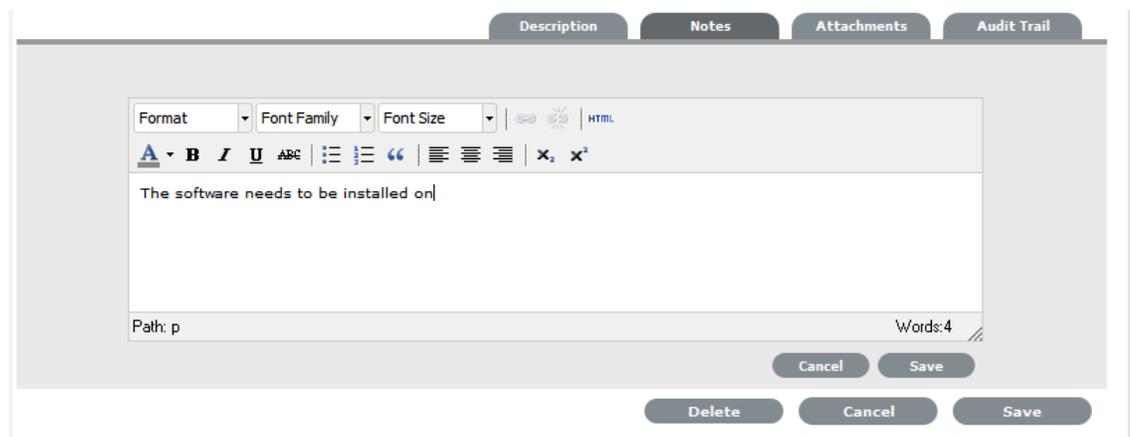
Item Notes

To add Notes to an Item, under the Item's Details tab:

1. Click Edit
2. Select the Notes tab



3. Click New
4. Enter details in the Notes field



5. Click Save.
The Note will be allocated an identification number hyperlink for access. It will also be time- and date-stamped.

Item Attachments

To add Attachments to an Item, within the Item's Details tab:

1. Click Edit to display the Attachment tab New button
2. Click New



3. Browse and select a file
4. Enter a Description, if required
5. Adjust Private and Public option, if relevant

Selecting Public will make it accessible on the Customer Portal, when the Item is in a Customer Visible state.

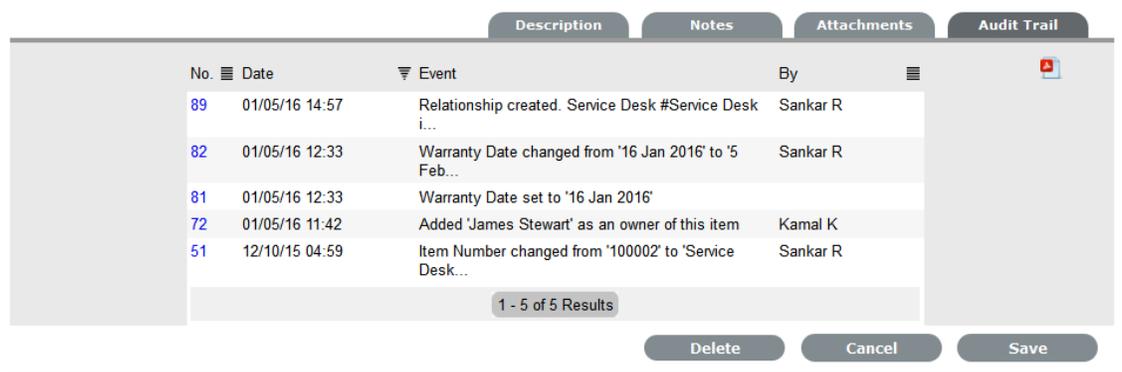
6. Click .

Item Audit Trail

The Audit Trail tab records all changes that are made to fields within the Item Information and Details screens. These entries are made to record all the alterations made to Items and the CMDB.

To view an audit trail entry, under the Item Details tab:

1. Select the Audit Trail tab
2. Click on the identification number hyperlink to display the entry details.



No.	Date	Event	By
89	01/05/16 14:57	Relationship created. Service Desk #Service Desk i...	Sankar R
82	01/05/16 12:33	Warranty Date changed from '16 Jan 2016' to '5 Feb...	Sankar R
81	01/05/16 12:33	Warranty Date set to '16 Jan 2016'	
72	01/05/16 11:42	Added 'James Stewart' as an owner of this item	Kamal K
51	12/10/15 04:59	Item Number changed from '100002' to 'Service Desk...	Sankar R

1 - 5 of 5 Results

Delete Cancel Save

Rollback Option

All changes recorded in the Audit Trail can be rolled back to reinstate information recorded against an Item.

To return Item details to previously saved information:

1. Click Edit
2. Select the identification number hyperlink of the entry to be reversed
3. Click the Rollback button
4. Save the Item.

The Item details will revert to information recorded before an update was made.

Costs Tab

For Users who are not assigned the Finance Role, the Costs Tab displays SLA Details and Item Availability information. Users who are assigned the Finance Role, also have access to the Item's financial and contractual details. The following Item Costs details include:

- ◆ Base cost
- ◆ Purchase date and related information
- ◆ Depreciation data
- ◆ Inherited costs
- ◆ SLA and Contract details
- ◆ Availability statistics.

Completing the Depreciate Over field causes the application to automatically keep track of the Item depreciation over the specified number of years. The current value of the Item after depreciation is displayed at Depreciated Value. The Audit Date field is used to record the date when the Item was last audited.

The Financial Costs and Inherited Costs fields allow the support organization to assign costs across related Items and charge Users and/or Organizational Units appropriately.

Financial	Description
Cost	The financial investment made to purchase the Item. This figure is also used when the Delegate Costs is enabled for allocating costs across related Items.
Monthly Cost	The amount invested on a monthly basis to maintain the running of an Item. This figure is also used when the Delegate Costs option is enabled for allocating costs across related Items.
Purchase Date	The date the Item was purchased.
Depreciate Over	Enter the number of years the Item is to be depreciated over, if required.
Depreciated Value	The system calculates the current value of the Item based on the Purchase Date and the number of years the Item is to be Depreciated Over.
Audit Date	Set the date the Item is next to be audited.
PO Number	If Purchase Orders are enabled for the system, the field is visible and automatically populated with the PO number generated by a User within the Finance>Purchase Orders tab, when the Item order was recorded in the system.
Inherited Costs	
Inherited Capital	Total infrastructure costs of parent CI's that directly contribute to the cost of the current CI. This figure is derived from all the Cost fields within the Item Information>Costs tab of related Parent Items.

Financial	Description
Inherited Ongoing	Running costs of all associated Items that enable the current CI to continue to function. This figure is derived from all the Monthly Cost fields within the Item Information>Costs tab of related Parent Items.
Delegate Costs	<p>To enable cost delegation across the relationship map allowing associated Items to inherit the costs of the current CI, select Yes. This will take the figures from the Cost and Monthly Cost fields for the Item and spread them across related Child Items.</p> <p>Define the technique to be used to evaluate the cost split:</p> <p><i>Child Count:</i> Costs are split by percentage based on the number of child CI's the costs are being delegated across.</p> <p><i>User Count:</i> Costs are split proportionally based on the number of users of the child CI's the costs are being delegated across.</p> <p><i>Custom %:</i> The relationship itself allows for the % cost to be assigned</p>

The figures displayed within the Availability fields are automatically calculated by the application, using the Item Lifecycle as it moves between online and offline States:

Availability

Avg Repair Time	Entries displayed here are automatically calculated based on the average length of time an Item is offline.
Avg Time To Fail	Figures displayed here are automatically calculated based on the average time between an Item being offline.

Billing Enabled

When Billing is enabled, a Service Level hyperlink is available within the Costs screen. This provides access to the Service Level Agreement details that govern the lifecycle for Requests logged against the Item.

Item Information

Information Details Costs Requests Relationships Outages AMIE Snapshots

Edit Duplicate Print Item # Wifi Service (WIFI Service)

Contract

Service Level [Warranty](#)

Contract # 9

Contract Type Subscription

Invoice # [100019](#)

Start Date 01/07/16

End Date 02/09/17

Expires 1 Year 28 Days

Warranty

Expires 02/03/16

Availability

Avg Repair Time N/A

Avg Time To Fail N/A

Contracts

Contract #	Type	SLA	Invoice #	Start Date	End Date
9	Per Item	Warranty	100019	01/07/16 12:09	02/09/17 23:59

1 - 1 of 1 Results

Done

If Invoices are also enabled, an Invoice Number hyperlink is available and when selected, will display the invoice details for the Contract that covers the Item. The Start Date and End Dates stipulate the contract length covered for the Item. It is summarized by the days or hours recorded in the Expires field.

The Contract tab within the Item Information Costs tab summarizes the contract details that cover the Item. Further Contract details can be found within the relevant Contract Number within the Finance>Invoices screen.

Create a Contract

Through the Item Costs tab, Contracts with an associated Invoice Number (if relevant) can be generated for an Item, after it has been logged in the system.

To add a Contract to an Item, within the Configuration>Item screen:

1. Select the Item Number
2. Move to the Costs tab

The Contracts tab is visible in the bottom right corner of the screen

3. Click Edit

The Add and Delete buttons are made available within the Contracts tab

Contracts

Contract #	Type	SLA	Start Date	End Date
0 - 0 of 0 Results				

Add Delete

Delete Cancel Save

4. Click Add

(If Invoices are enabled in the system, an Invoice number will be automatically generated and assigned to the Contract).

5. Select an SLA from the drop-down option

The screen will display the SLA details and the Contract Type locked to Per Item.

Priority	Response Time	Restoration Time	Resolution Time	24 x 7 support	Alert
Urgent	6 Hours	12 Hours	24 Hours	Yes	None
High	12 Hours	24 Hours	48 Hours	Yes	None
Medium	18 Hours	36 Hours	72 Hours	Yes	None
Low	24 Hours	48 Hours	96 Hours	Yes	None

6. Assign the Time period to be covered by the Contract:

If *Subscription* is selected, the Start and End Dates are automatically completed by the system, but can be edited if required.

If *Time Limited Subscription* is selected, the Support Hours field is displayed and the number of support hours purchased by the Customer should be entered. Also, the Start Date and End Date fields should be completed manually, entering the length of time for the subscription period.

If *Support Hours* is selected, the number of support hours purchased by the Customers should be entered.

If *Support Hours by Month* is selected, set the number of hours purchased per month and define which day of the month contract is to rollover to start the new month. The Total Support Hours will automatically be calculated based on the Start and End Dates set for the Contract.

(If a Contract is forward dated with a Start Date set in the future, the Pending Contract status is assigned.

7. Add any relevant Invoice Notes
8. Check the Taxable box, if the Contract is to be taxed
9. Click Save.

If Invoices are enabled in the system, an Invoice number will be automatically generated for the Contract and made available within Finance>Invoices. Payment will need to be processed by a Finance User before the Contract can be enabled in the system. If invoice payment is required before the contract can be enabled in the system the following Warning message is displayed:

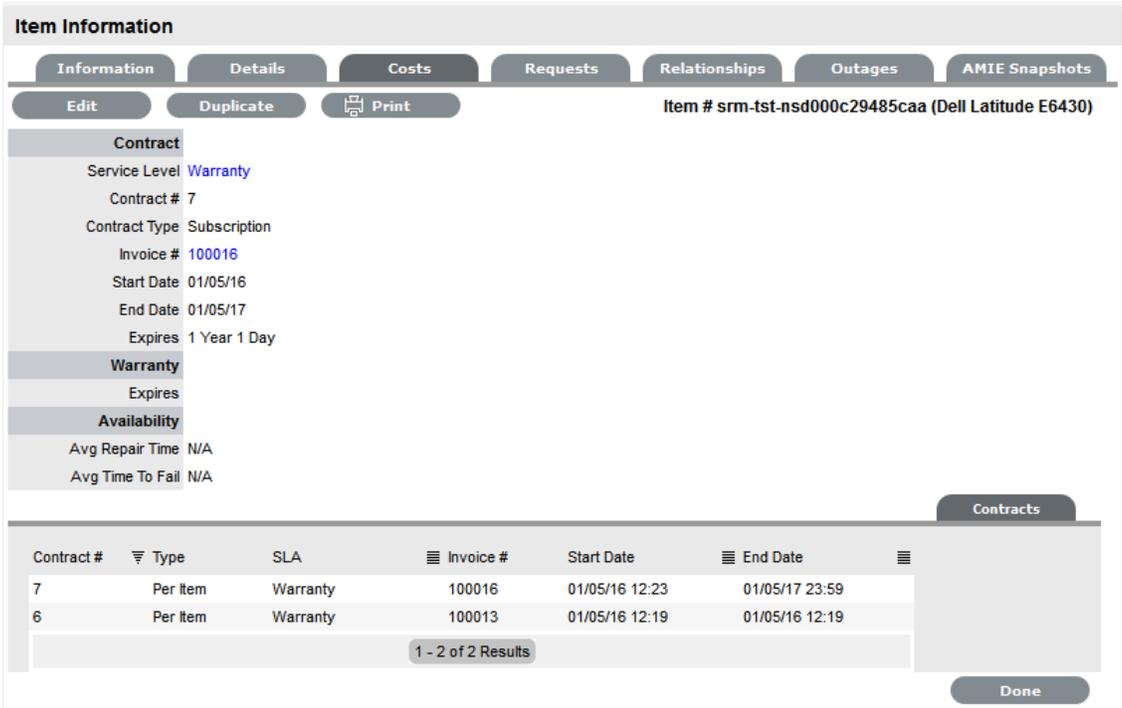


Warning

The invoice has been generated against this item with status "Pending Unpaid". Technicians will not be able to work with this item until the invoice has been paid.

10. Click Next

The Contracts information is only populated after the Invoice has been processed. To process the Invoice, as a Finance User move to the Finance>Invoices tab. Once the relevant Invoice payment has been processed the Contract details will be visible in the Costs >Contracts tab.



Item Information

Information Details Costs Requests Relationships Outages AMIE Snapshots

Edit Duplicate Print Item # srm-tst-nsd000c29485caa (Dell Latitude E6430)

Contract

Service Level [Warranty](#)

Contract # 7

Contract Type Subscription

Invoice # 100016

Start Date 01/05/16

End Date 01/05/17

Expires 1 Year 1 Day

Warranty

Expires

Availability

Avg Repair Time N/A

Avg Time To Fail N/A

Contracts

Contract #	Type	SLA	Invoice #	Start Date	End Date
7	Per Item	Warranty	100016	01/05/16 12:23	01/05/17 23:59
6	Per Item	Warranty	100013	01/05/16 12:19	01/05/16 12:19

1 - 2 of 2 Results

Done

Requests Tab

This section lists all the requests that have been logged against an Item.

Use the system list filter to display the relevant type of request or task. To expand and view the request in full, select the Task # or Problem Report hyperlink.

Item Information													
Information		Details		Costs		Requests		Relationships		Outages		AMIE Snapshots	
Item #Wifi Service (WIFI Service)													
Incidents [sys] ▼													
Task #	Process	Date	Status	Technician	Problem Report								
100015	Incident	12/10/15 09:01	Closed - Resolved	Vaibhav Jain	Not able to get wifi access								
100014	Incident	12/10/15 05:53	Closed - Resolved	Kamal K	Not able to connect to Wifi								
100013	Incident	12/10/15 05:50	Closed - Resolved	Kamal K	Connect to Wifi								
100012	Incident	12/10/15 05:49	Pending	Kamal K	unable to connect to Wifi								
1 - 4 of 4 Results													
Done													

Relationships Tab

The Relationship Tab allows Users to view and/or create a Relationship Map for the current Item, with other Items within the CMDB.

The Relationship direction can be defined as:

- ◆ Service Oriented - Parent-Child Relationship
- ◆ Component Oriented - Child-Parent Relationship.

Within each view the Relationship Class can be defined as:

- ◆ Hierarchical Relationship
- ◆ Connection - an association between the selected Items.

For a Service, such as the Email or Web Site Service, it is recommended that the Hardware be defined as the Parent for the Software Items and the Software be defined as the Parent of the Email or Web Site Service.

Create a Relationship

To create a new Item Relationship:

1. Select Configuration>Items
2. Select an Item
3. Select the Item's Relationship tab
4. Click Edit
5. Click New
6. Select the Relationship Direction and Class from the drop-down menus
7. Define the Relationship by selecting a description from the drop-down list

Item Information

Information Details Costs Requests Relationships Outages AMIE Snapshots

Print Item # Microfocus - Intranet (Website Services)

Direction Parent - Child

Type

Related Item Hierarchical Connection

Item Number Item Type Org. Unit

Item #	Item Type	Identifier	Status
jdk-7u60-windows-x64	Windows Bundle		Installed
Wordweb7	Windows Bundle		Installed
Firefox 1.0	Windows Bundle		Installed

NOTE: If the Relationship Type has the Inherit Parent Ownership option enabled, Child Items that use this relationship will inherit the Parent Item's owners. The ownership will not be editable and no other Parent Item can be assigned to the Child Item. A warning will be displayed if a relationship type has the Inherit Parent Ownership option enabled.

8. Use the Find Item field to locate the relevant Item
9. Click on the Item Number hyperlink to create the Relationship
10. Click Save to default to the Relationship Map view.

Relationship Map

Within the Relationships tab of the Item Information screen, a Relationship Map visually displays the connections that have been defined for an Item. All Item Relationships are listed in the Relationships Table beneath the Map. The Relationship Map can display up to 48 Child Items and 16 Parent Items in the one diagram.

The central icon of a Map is a visual representation of the selected Item. Scroll over an Item label to view any information recorded on the Information and Details tabs of the Item. To drill-down through the relationships, click on an Item icon label. To change the focus of the Relationship Map to another Item, click on the Item icon label and the system will request that OK be selected before updating the central node of the Map.

The Relationship Table data displayed at the base of the map can be filtered using the Direction filter view of Parent-Child or Child-Parent.

New Delete Print Item # Service Desk (Service Desk)

Direction: Child - Parent Display: 10

Current Item	Relationship	Related Item	Item #	Identifier	Category
Service Desk	is a child of	Windows Bundle	Microsoft 2010		Service

1 - 1 of 1 Results

The map displays the relationship between each Lifecycle State by using different colors to represent the type of Lifecycle State.

Color

- | | |
|---------------|---|
| Green Circle | CI is assigned an online status. |
| Red Square | CI is assigned an offline status. |
| Blue Triangle | Service CI is assigned a pre-production status. |
-

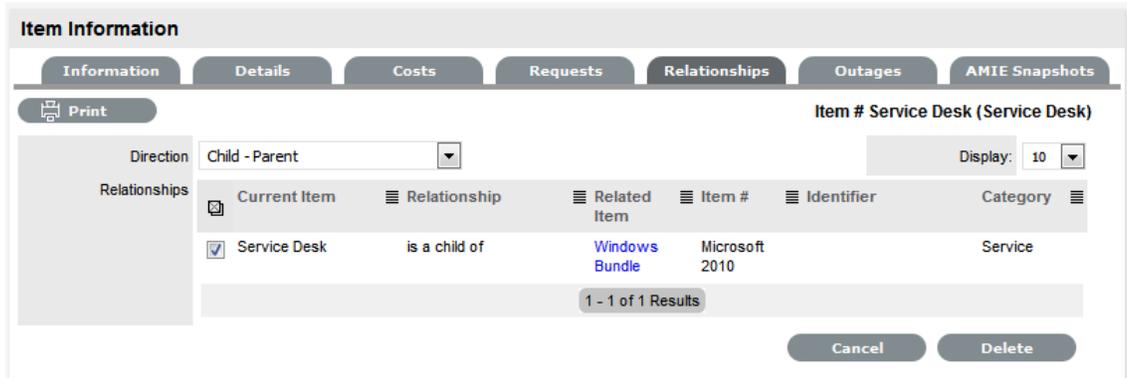
The Lifecycle State name can be accessed by scrolling over the Item icon within the Map.

To delete a Relationship:

To remove the Relationship between Items:

1. Select the relevant Item within the Configuration tab
2. Move to the Relationships tab
3. Click Edit
4. Select Delete

A table with the Relationship details is displayed.



5. Select the Relationship Direction to display the relevant Relationship table
6. Mark the checkbox next to the Relationship that is to be removed
7. Select Delete
8. Click Done to return to the Item list.

AMIE Item Imports and Relationships

Items with Item relationships that have been imported using the AMIE engine, retain the relationships that exist within the Asset Management Tool. A visible map of the relationships is recorded within the Relationships tab.

Outages Tab

Planned outages can be created for an Item under the Outages tab. This is a period of time an Item will not be available for a Customer's use.

If an Item has an SLA with a specified Blackout Period, Outages should be planned to fall within this time. The Blackout Period is an agreement between the Customer and the Service Desk regarding a period of time when the Customer has no service expectations. This can also be the preferred time for Item upgrades and maintenance without affecting service availability.

When an Outage is being created, the Blackout Periods times are displayed to ensure the User creates a new Outage that does not breach the Item's SLA.

Creating an Outage

To create an Outage:

1. Select Configuration > Items
2. Select the Item Number
3. Go to the Outages tab

4. Click Edit

5. Click New

The screen will expand to display the Outage Editor screen including the Blackout Period, if defined for the Item associated SLA.

Planned Outages

Details	Description
Interval	Select One Time if the Outage is a one off, or set regular outages based on a weekly or monthly basis.
Start Date	Select the Start Date within the calendar, and modify the Time accordingly inside the calendar pop-up.
End Date	Select the End Date within the calendar, and modify the Time accordingly inside the calendar pop-up.
Notification	Select Email or SMS Notification about the Outage is to be sent to the Primary Contact of the Org. Unit, or All Customers/Owners associated with the Item.

Planned Outages

Reminder	This option is displayed when a Notification is set for the Outage. If a Reminder notification is to be applied to the Outage, check the box and define the period of time prior to the Planned Outage period that the reminder is to be issued.
Reason	Enter a description that details why a Planned Outage is being scheduled.

Within the table the Start and End Time is displayed as Local Time and Actual Time.

- ◆ Local Time is based on the time zone of the logged in User
- ◆ Actual Time is based on the SLA time zone.

6. Define the Interval for the Outage

Select One Time if the Outage is a one off, or set regular outages based on a weekly or monthly basis.

7. Enter the Outage details

Select the Start/End Date within the calendar, and modify the Time accordingly inside the calendar pop-up

8. Set the Notification method and recipients, for when the Outage is saved

9. Set Reminders, if required

Tick the Reminder Email field, if a reminder is to be emailed to defined recipients prior to the Outage time. Define the length of time before the Outage occurs that the reminder is to be sent.

The screenshot shows a form with two rows. The first row is labeled 'Notification' and has two dropdown menus: 'Email' and 'Primary Contacts'. The second row is labeled 'Reminder' and has a checked checkbox, a dropdown menu set to '24 hours', and a text field containing 'before outage'.

10. Define the Offline Status and Online Status for the Item

These are the States the Item will be automatically assigned in the CMDB when the Planned Outage commences and ends.

11. Complete the Reason for the Outage

12. Click Save.

The Outage notification is sent to the defined recipients upon save.

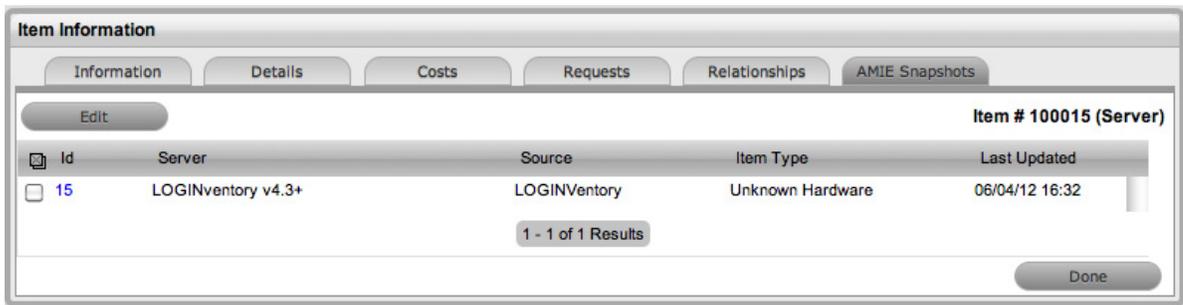
13. Click Save and Done.

To view the details of the Outage, select the Outage No. link in the Outage List View.

AMIE Snapshots Tab

(This tab is only visible when two or more asset management tools are synched within AMIE as configured in Admin>Setup>AMIE tab.)

The Item Information AMIE Snapshots tab displays a list of Snapshots that apply to the Item Information being displayed, and provides a search and remove functionality. Click on the Snapshot Id to view what information was imported from the various asset management tools.



About Snapshots

As different asset management tools may not record the same information for an Item, the most relevant information from different sources can be combined against one Item within the CMDDB, by merging snapshots created by the different tools using the Category Map configured for an Item Category.

When the application is configured to synchronize with multiple asset management tools and the automatic Item creation option is disabled in Admin>Setup>AMIE Import, the system creates an image or Snapshot of the asset information which is made available for management within the Configuration>AMIE Snapshot screen for all Items, or viewed within the AMIE Snapshots tab for a specific Item that uses a federated source for Item Details.

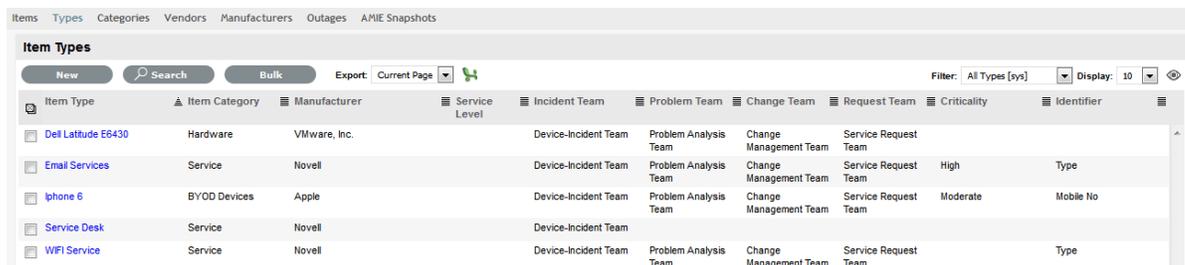
The information source that is applied to the fields in the Details tab, is defined in the Federation tab of the Category associated with the Item. Based on the map built in the Federation tab, fields within the Item Details tab are populated when AMIE snapshots are applied to new or updated Items.

2.6.6 Item Types

- ◆ [“Create a New Item Type” on page 561](#)
- ◆ [“SLAs and Item Types” on page 564](#)
- ◆ [“Classification” on page 564](#)
- ◆ [“Items” on page 567](#)
- ◆ [“Requests” on page 567](#)
- ◆ [“Costs” on page 567](#)
- ◆ [“Fields” on page 569](#)
- ◆ [“Responses” on page 571](#)

Item Types are templates used to create Items. Items are specific instances of Item Types with individual asset detail information.

In this section, Item Types and their manufacturers can be created and edited. The Item Types default support Team is assigned here, as well as Criticality, service level and other default information.



For Item Types that use a Category with the Service Category functionality enabled, a Costs tab is also displayed that allows a User with the Finance Role to forecast the costs for offering the Service Item that applies the Item Type.

Create a New Item Type

To enter a new Item Type:

1. Select Configuration>Types
2. Click New

The Type Information screen appears.

The screenshot shows the 'Type Information' screen with the following fields and sections:

- Item Type:** Name (text input), Manufacturer (dropdown with add button), Item Category (dropdown), Criticality (dropdown).
- Cost:** Unit Price (text input, value 0).
- Warranty:** Duration (dropdown).
- Instance:** Total (text input), Assigned (value 0).
- Customer:** Hidden (radio buttons On/Off, Off selected), Ignore Share (radio buttons On/Off, Off selected), Add Forum Topic (checkbox).
- Support Teams:** Request Default (dropdown: Service Request Team), Incident Default (dropdown: Device-Incident Team), Problem Default (dropdown: Problem Analysis Team), Change Default (dropdown: Change Management Team).
- Service Level:** Default Level (dropdown), Supported Levels (text input).
- Find SLA (Name):** Search input field.
- Attachments:** Table with columns File Description, Size, Date, and a 'New' button. It shows '0 - 0 of 0 Results' and 'Cancel' and 'Save' buttons.

3. Enter the Name of the Item Type
4. Enter a Manufacturer using the drop-down list

Or, select **+** to add a Manufacturer. The Manufacturer screen appears.

Type Information

Name	Name of the Item Type.
Manufacturer	The manufacturer of the Item Type. New manufacturers can be created and existing manufacturers can be edited and deleted by using the Edit and New buttons that appear beside the drop-down menu of manufacturers.

5. Using the drop-down list, select the relevant Item Category
6. Select the Criticality for the Item Type

Item Type	
Item Category	This signifies the type of Item. (Hardware, Software or Service are the default Types, but Users with the Supervisor Role can create more if required).
Identifier	The drop-down list that appears is drawn from the fields defined for the Item Category selected. Although this information is not required, the Identifier is used to differentiate similar Items that may be in use throughout an organization. For example, if an organization uses the same printers for all departments, an Item Category field of "Location" could be configured for the Item Details and this could also be used as a secondary Identifier for Printer Item.
Criticality	<p>Rates the degree of importance of an Item Type within an organization, which can be adjusted on a per Item basis. The 'Impact' of a Request is initially pulled from the Criticality of the Item, but can be adjusted within the request Information screen if required. Requests logged through the Customer Portal, use the Criticality of the Item to set the Priority of the request.</p> <p>The Incident Analyzer, if enabled by the Administrator in Setup>CMS>Incident Analyzer, can apply the Criticality to automatically detect Problems.</p> <p>The minimum Criticality level can also be used to determine the off-line Items that appear on Outages pages, if the Outages pages are enabled by the Administrator in Setup>Privileges>System.</p>
Icon	When the Type details are saved, the Icon selected for the Item Category will be displayed. To customize the icon for the specific Item Type, select the Icon to access the Upload <input type="button" value="Upload"/> or Cancel <input type="button" value="Cancel"/> options. The icon must be 128 x 128 pixels.
Unit Price	The per-unit price of the Item Type.
Instance Total	Number of instances owned by the organization.
Assigned	Number of instances assigned to Customers as Items.

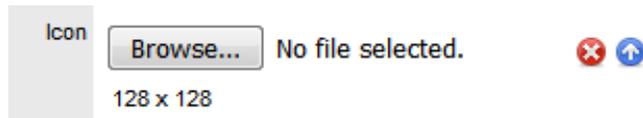
Item Type	
Hidden	<p>Select 'On' to ensure Customers cannot view this Item Type within the list in the Customer Portal. If all Item Types use this selection, the Item Type list will be completely removed from the Portal.</p> <p>Items created using Item Types with Hidden enabled, will not allow Customers to generate requests against them in the Customer Portal, nor will they be able to view or receive updates about requests logged by the User against Items with this functionality enabled.</p>
Creation	<p>Enabling this option gives Customers using the portal the ability to create new Items using this Item Type (if they have been granted the ability to create Items by the Administrator in Setup>Privileges>Customer>Create Item. (This option is not displayed when the Hidden option is enabled.)</p>
Ignore Share	<p>Enabling this option overrides the system level option for sharing requests raised against Items of this Type. Requests raised against Items of this Type will not appear in the customer portal when viewing shared requests is enabled.</p>
Add Forum Topic	<p>Create a forum topic using the Item Type Name. This option is only displayed when a new Type is being created.</p>
Incident Default	<p>The Team of Technicians assigned to support Incidents received related to the Item Type.</p>
Problem Default	<p>The Team of Technicians assigned to support Problems received related to the Item Type.</p>
Change Default	<p>The Team of Technicians assigned to support Change Requests received related to the Item Type.</p>
Request Default	<p>The Team of Technicians assigned to support Service Requests received related to the Item Type.</p>
Service Level Default	<p>The default service level for the Item Type. When Billing is enabled, service levels without a cost are listed as an option. The service level with an associated cost can be applied when the Item created, this ensures Item contract payment is processed.</p>
Support Levels	<p>All Service Level Agreements assigned to the Item Type, which will be displayed as options when a request is created applying Item that uses this Type template. SLAs listed here, are used within the Costs tab of Service Types to forecast break even points on the Service relative to the number of Users.</p>

Item Type

Find SLA (Name)

To assign multiple SLAs use this option. Click  to view all SLAs or refine the search by entering a specific name. Select the SLA hyperlink to assign the SLA to the Type Information. Click  to clear the search field.

7. Enter the Unit Price for the Item Type. This is an optional field that is used for asset management
See [Finance Role](#).
8. Set the Customer options
9. Assign the default support Teams
10. Assign one or multiple SLAs, as required
11. Click Save
The Type Screen moves out of Edit mode.
12. Click the icon if the generic Item Category icon image is to be changed for the Item Type
This icon is used as the visual representation of the Item Type in the Relationship Map.



NOTE: The dimensions of the uploaded icon must be exactly 128 x 128 pixels

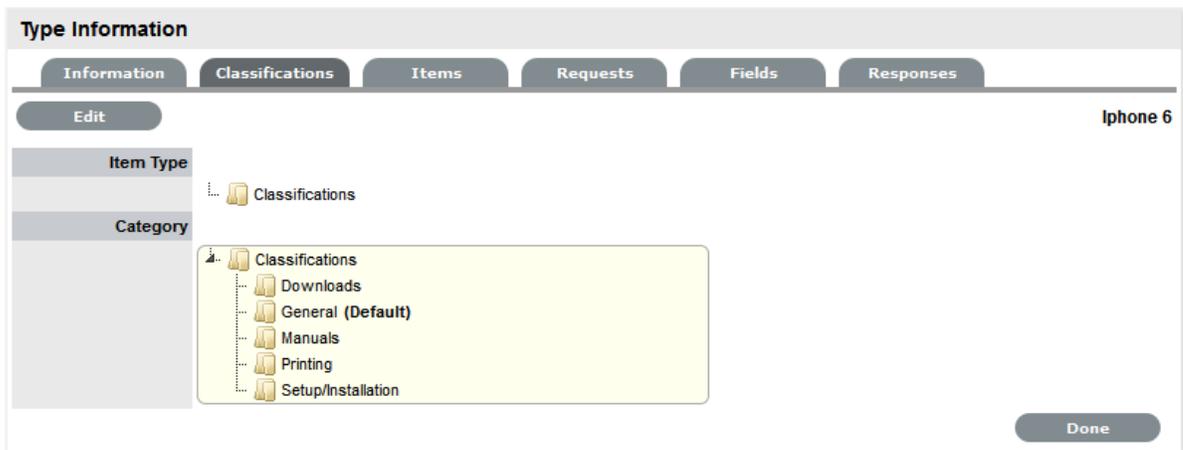
13. Move to the Classification tab to create classifications for issues related to Item of this Item Type.

SLAs and Item Types

When an Item Type is created with a defined SLA, any Item created using this Item Type automatically inherits the SLA. The lifecycle of a request raised against this Item is determined by the SLA milestones. However, it should be noted that the SLA can be adjusted within the Item if it is relevant to do so.

Classification

Category Classifications are used as generic problem classification for sorting requests. These are refined within the Item Type Classification to make them more relevant to the actual Item Type. For example, the Item Type category Hardware needs the Category Classification to be refined differently for hardware Item Types such as desktops and servers. To refine the problem types, Item Type Classifications are used.



Editing an Item Type Classification listing

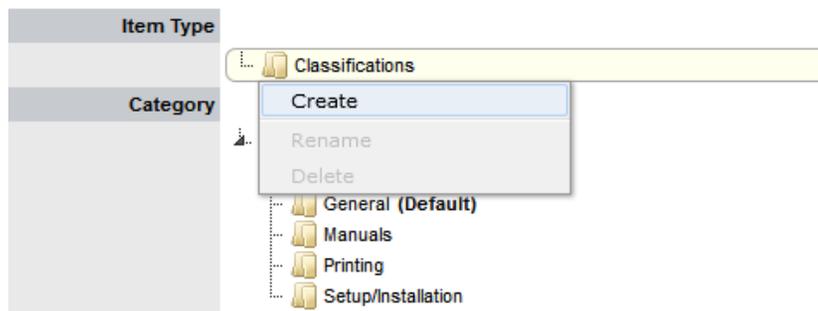
To edit the Item Type Classification entry:

1. Within the Item Type>Classification tab
2. Select Edit

A New button is displayed within the Item Type Classification section.

3. Right-click on the Classifications link

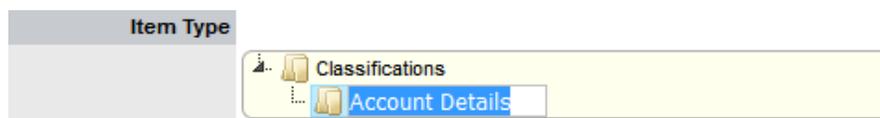
The Create option is displayed.



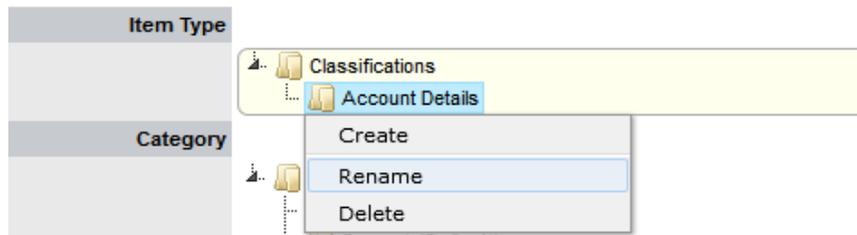
4. Select Create

A New node field is displayed in Edit mode.

5. Complete the details of the new list entry



6. Click outside the text field to save the entry
7. To re-name an entry, highlight the field



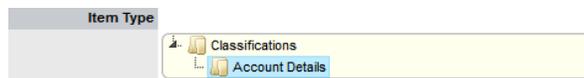
8. Select the Rename option
The field opens in edit mode
9. Change the details
10. Click outside the text field to save the changes
11. Repeat the above process to create all required list entries
12. Move existing Classifications to a new position, if required
Highlight the entry, then drag and drop the entry into its new location.
13. Click Save.

Creating Sub-Classifications

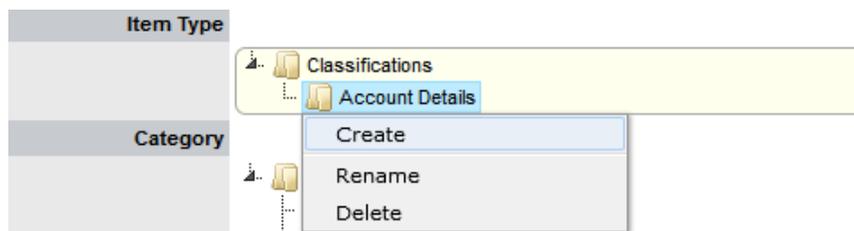
Classifications can be expanded to include sub-categories.

To create sub-classifications:

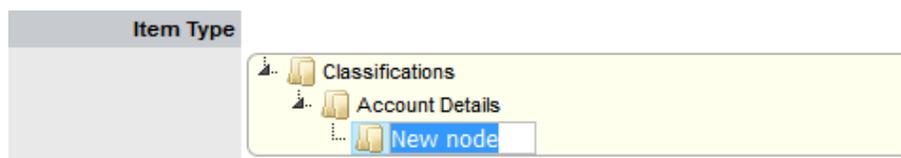
1. Select the relevant Classification header
The Classification header is highlighted.



2. Right-click the Classification Entry
The Create, Rename and Delete options are displayed



3. Click Create
4. Complete the details of the new node



5. Click away from the text field to save the change

6. The above steps can be repeated until the Sub-Classification list is completed.

To move an existing entry to a new position, select the entry, then drag and drop the entry into its new location

Items

The Items tab lists the Items created using this Item Type. Individual Item details can be viewed by clicking on an Item Number. The list of Items can be exported using the Excel button.

The screenshot shows the 'Items' tab selected in the 'Type Information' screen for 'Iphone 6'. The interface includes a navigation bar with tabs for Information, Classifications, Items, Requests, Fields, and Responses. An 'Excel' button is visible. The main content area displays a table with columns: Item #, Users, Org. Units, and Status. Two items are listed: 'Guru-Iphone6' (User: Guruprasad S, Status: Available) and 'Jason-Iphone6' (User: Jason Blackett, Status: Available). A 'Display: 10' dropdown is present. At the bottom, it shows '1 - 2 of 2 Results' and a 'Done' button.

Item #	Users	Org. Units	Status
Guru-Iphone6	Guruprasad S		Available
Jason-Iphone6	Jason Blackett		Available

Requests

The Requests tab lists all requests that have been created for this Item Type.

Use the Filter to switch between Incident, Problem, Change and Service Requests views. Requests can be viewed from this screen by clicking on the Task# or Problem Report hyperlink. The list of Requests can be exported using the Excel button.

The screenshot shows the 'Requests' tab selected in the 'Type Information' screen for 'Iphone 6'. The interface includes a navigation bar with tabs for Information, Classifications, Items, Requests, Fields, and Responses. An 'Excel' button is visible. The main content area displays a table with columns: Task #, Process, Date, Status, Technician, and Problem. A 'Filter' dropdown menu is open, showing options: All Tasks [sys], Change Requests [sys], Deployment Tasks [sys], Incidents [sys], and Problems [sys]. The 'Display: 10' dropdown is also visible. At the bottom, it shows '0 - 0 of 0 Results' and a 'Done' button.

Task #	Process	Date	Status	Technician	Problem
--------	---------	------	--------	------------	---------

Costs

NOTE: This is only visible to Users with the Finance Role.

The Costs tab is only available within the Service Type Information screens and allows organizations to calculate the Break-Even Point (BEP) of a service based on forecasting the number of Customers of that Service. This allows the service organization to account for the per calendar month price of the Service, which is used to calculate the ongoing revenue figures within the Item Costs tab that uses the Service Type template.

Type Information

Information Classifications Items Requests **Costs** Fields Responses

Edit Service Desk

Forecast Costs		Actual Costs	
Capital	\$12,000.00	Capital	\$12,000.00
Recovery	5 years	Recurring	150.0 p.c.m
Recurring	400.0 p.c.m		

SLA	Cost (p.a.)	Current Users	Forecast Users	B.E.P.	Price (p.c.m)
Gold	\$2,000.00	16	100	\$6.00	\$173.00

Done

Forecast Costs

Capital	Enter the sum total to be invested in hardware and software infrastructure that will underpin the Service.
Recovery	Complete the field with the expected number of years designated to recover the costs of implementing the Service.
Recurring	Enter the proposed ongoing cost, on a per calendar month basis, for offering the Service.
Services	<p>Using the details entered in the Costs fields and the cost per annum of the SLA, enter the forecast number of Customers/Users to calculate the break even point (B.E.P) of the Service. Using the auto-calculated B.E.P., enter a per calendar month Price for the Service to recover costs. This figure is used in the Service Item Costs tab to calculate the ongoing Revenue figures.</p> <p>NOTE: If an SLA with an Internal Cost is assigned to the Type, the B.E.P will be the SLA cost divided by 12 plus the cost of recovering the Capital expenditure over the number of years defined for the Capital to be recovered. For example, where the SLA cost is \$240 for the year, the B.E.P will never be less than \$20 per month.</p>
Actual Costs	
Capital	Content for this field is derived from the Cost field within then Costs tab of the Item created using this Type.
Recurring	Content for this field is derived from the Monthly Cost field within the Costs tab of the Item created using this Type.

Fields

Within the system, service organizations can refine custom fields made available during the request creation process based on the Item assigned to the request. In the Fields tab a User can create custom fields that apply to the Item Type. Therefore, when a request is logged against an Item that uses an Item Type with custom fields configured within the Fields tab, the Fields are made available within the Details tab of the request creation process.

These fields are in addition to the fields created by the Administrator within the Admin>Setup>Custom Fields, which are created for the specific Process, such as Incident, Problem, Change and Service Requests.

Type Information							
Information	Classifications	Items	Requests	Fields	Responses		
Field	Data Type	Style	Active	Required	Customer Visible	Customer Editable	Default Value
Access Enabled?	Boolean	Yes/No	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No
Type Custom 2	String	Text			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Type Custom 3	String	Text			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Type Custom 4	String	Text			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Type Custom 5	String	Text			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

T1

1 - 5 of 5 Results

Done

To create Field labels within the Type Information screen:

1. Click the Fields tab
2. Click Edit
3. Select a Field hyperlink

The Custom Field screen is displayed

Type Information

Information Classifications Items Requests **Fields** Responses

Email Services

Custom Field

Field Label ⓘ

Category

Active Yes No

Cancel Save

4. Click Yes to activate the Field
5. Complete the following details:

Categories Fields	Description
Category	
Field Label	The name of the field.

Categories Fields	Description
Active	Indicates if the field is active.
Required	Indicates if the field is required or mandatory field.
Customer Visible	Defines if the Customer can see the field within the Customer Portal. If Yes is selected, define if the Customer can edit the field information on the Customer Portal.
Data Type	Dictates the field's Data Type. The options available include : <ul style="list-style-type: none"> ◆ String - List or Free Text ◆ Number ◆ Boolean - radio buttons for Yes/No and True/False ◆ Date - creates a date field ◆ Currency- creates a currency field ◆ Hyperlink.
Style	States the style of the field. eg. String- List or Free Text field.
Unique Value	When active, the system prevents the duplication of data within the customized field.
Default Value	Value entered is the default system entry for the field, when the field is not completed manually.
Input Validation	When enabled the Input Mask and User Mask can be defined. <i>Input Mask</i> : A regular expression to use for data validation of values entered by a User (i.e., Zip/Post Code, telephone no.) <i>User Mask</i> : A User Friendly representation of the Input Mask that Customers can understand should it appear in a validation error message.
Enable Description	When enabled a Description field appears, allowing the User to enter details of what information is the field is expected to capture. These details are accessible next to the custom field on the relevant screen.

6. Click Save.

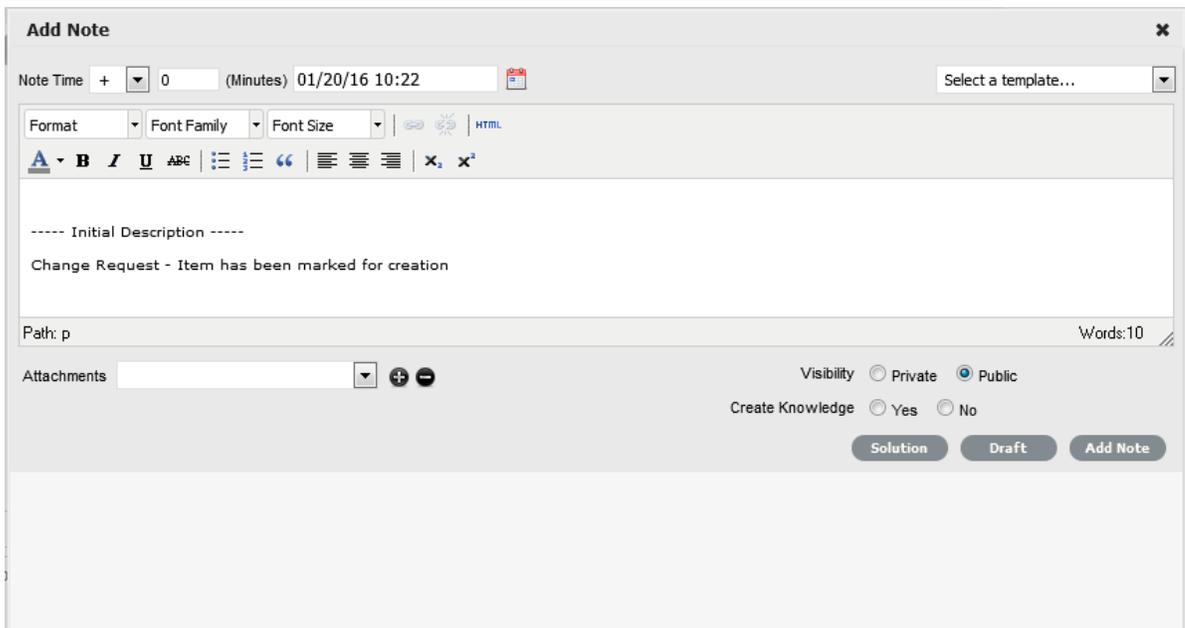
The active Field will now be available during the request creation process, for all Items that use the Item Type.

The screenshot shows a 'Request Information' dialog box with two tabs: 'Customer' and 'Details'. The 'Details' tab is active. Under the 'Request' section, there are two dropdown menus: 'Request Type' set to 'New Incident' and 'Classification' set to 'Service Offline'. Under the 'Details' section, there is a field 'Access enabled?' with two radio buttons: 'Yes' (unselected) and 'No' (selected). A red arrow points from the text 'Field configured in the Item Type>Fields tab' to the 'Access enabled?' field. Below the 'Details' section is a 'Subject' text field and a 'Description' text area with a rich text editor toolbar. At the bottom, there is a 'Path:' label, a 'Words: 0' counter, and 'Cancel' and 'Done' buttons.

Responses

The Responses tab within an Item Type displays the templates configured within the Item Category>Response tab, which can be used as content for Notes sent for requests received against the Item Category. In addition to saving time for customer responses that are sent on a regular basis, these ensure the service desk responds to issues in a consistent manner, in line with the support organization's policies and protocol. Within the Types>Responses tab, additional Note templates can be configured, that will only be available for requests logged against that Item Type.

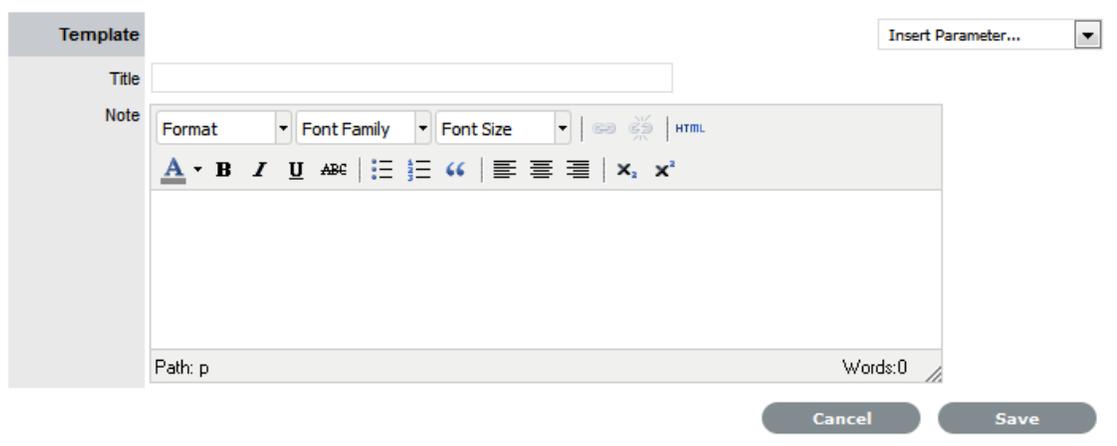
The following screen displays a list of default template options available within the Notes tab of a request:



Adding a Template for Item Types

To add a Note template:

1. Go to the Responses tab
2. Click Edit
3. Click Add



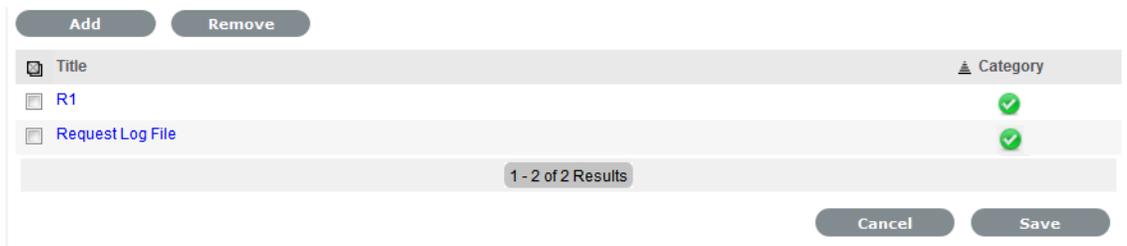
4. Enter the Template Title
5. Complete the content for the Note, inserting any relevant parameters
6. Click Save.

Removing a Template

Within the Types>Response tab, only templates created for the Item Type can be deleted. Templates created at the Category level must be deleted within the Category>Responses tab.

To delete a template within an Item Type:

1. Go to the Responses tab
2. Click Edit
3. Check the box in the column next to the template Title



4. Click



5. Click Save.

2.6.7 Create a Manufacturer

- ◆ [“Editing a Manufacturer” on page 573](#)
- ◆ [“Creating Custom Field Lists” on page 574](#)

Manufacturers are created and assigned to an Item Type to establish the distributor of the Type.

To create a new Manufacturer when creating a new Item Type:

1. Leave the Manufacturer field blank
2. Click the  button
3. Enter the Manufacturer name as well as any other details
4. Click Save.

The screen will return back to the Item Type Information window and display a confirmation that the Manufacturer has been created successfully.

Editing a Manufacturer

Existing Manufacturers can be modified within the Item Type screen.

To edit a Manufacturer:

1. Select the Manufacturer from the list provided
2. Select  to open the Manufacturer information screen in Edit mode

The system will inform the User that any changes made to the Manufacturer will undo any unsaved Item Type changes. Click OK to continue.

Manufacturer Editor

Details Types

My Company

Details

Manufacturer | My Company

Short Name | New Manufacturer

Address |

City |

Zip |

Country | ▾

Phone |

Fax |

URL |

Delete Cancel Save

3. Make the required changes
4. Click Save
The screen returns to the Item Type screen.
5. Click Save and Done.
The screen reverts to the Item Type list view.

Creating Custom Field Lists

- ◆ [“Creating a New List Entry” on page 575](#)
- ◆ [“Creating Nested List Entries” on page 576](#)
- ◆ [“Renaming a List Entry” on page 577](#)
- ◆ [“Deleting a List Entry” on page 577](#)

Lists can be created as a data type option within custom fields across the application. They can be created for Item Category and Item Type custom fields, Classifications for requests and system-wide custom fields activated by an Administrator. Lists allow a User to create a series of entries for a custom field that will appear as a drop-down option list.

Request	
Request Type	Service Offline
Classification	New Service Request
Subject	Service Offline

Creating a New List Entry

To create a new list entry within the List Contents field:

1. Right click the Entries link

The Create option is displayed

2. Click Create

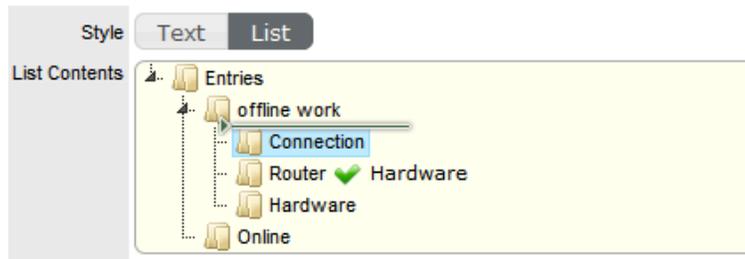
A New node link displayed

3. Enter the name of the field
4. Click outside the field to save the entry

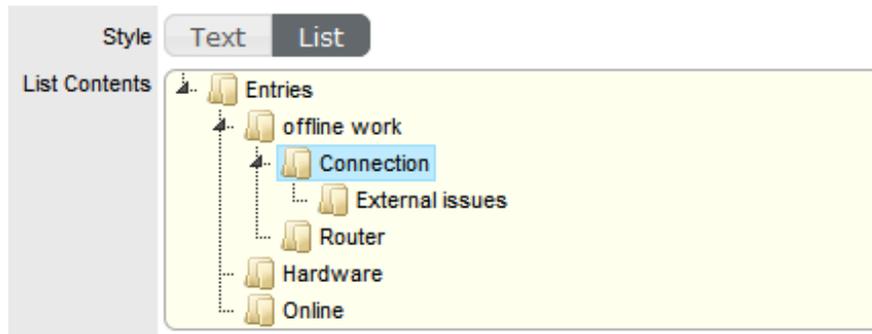
5. Repeat this process until all list entries have been added

To create a nested list, right click on the relevant list entry and repeat the above process.

- To move an existing entry to a new position, select the entry, then drag and drop the entry into its new location



- When all the relevant details have been defined for the custom field, click Save.



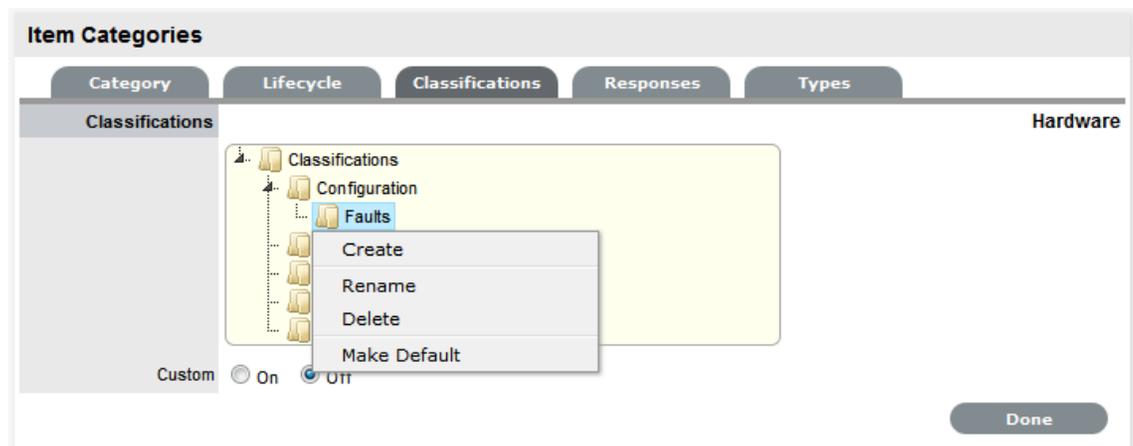
Creating Nested List Entries

List entries can be expanded to include nested options.

To create a nested list:

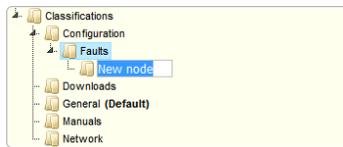
- Right-click the relevant list entry header

The Create, Rename, Delete and Make Default options are displayed.

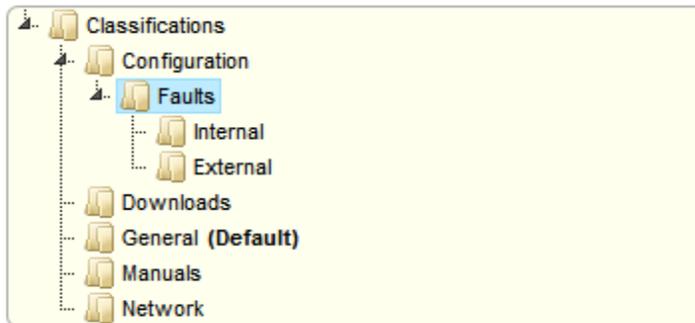


- Select Create

A text box will appear under the list entry.



3. Enter the name for the list entry
4. Click away from the text box to commit and save the change
5. Move an existing list entry to a new position, if required
Select the entry, then drag and drop the entry into its new location
6. The above steps can be repeated until the nested list is complete.

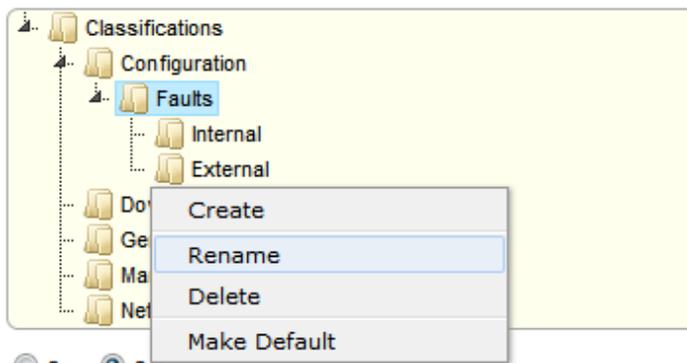


Renaming a List Entry

Any list entry can be renamed.

To rename a list entry:

1. Right-click the list entry link



2. Click Rename
3. Edit the field content
4. Click away from the text field to save the change.

Deleting a List Entry

To delete a list entry:

1. Right-click the relevant list entry

2. Click Delete
3. Click Done when the list is complete.

2.6.8 Categories Tab

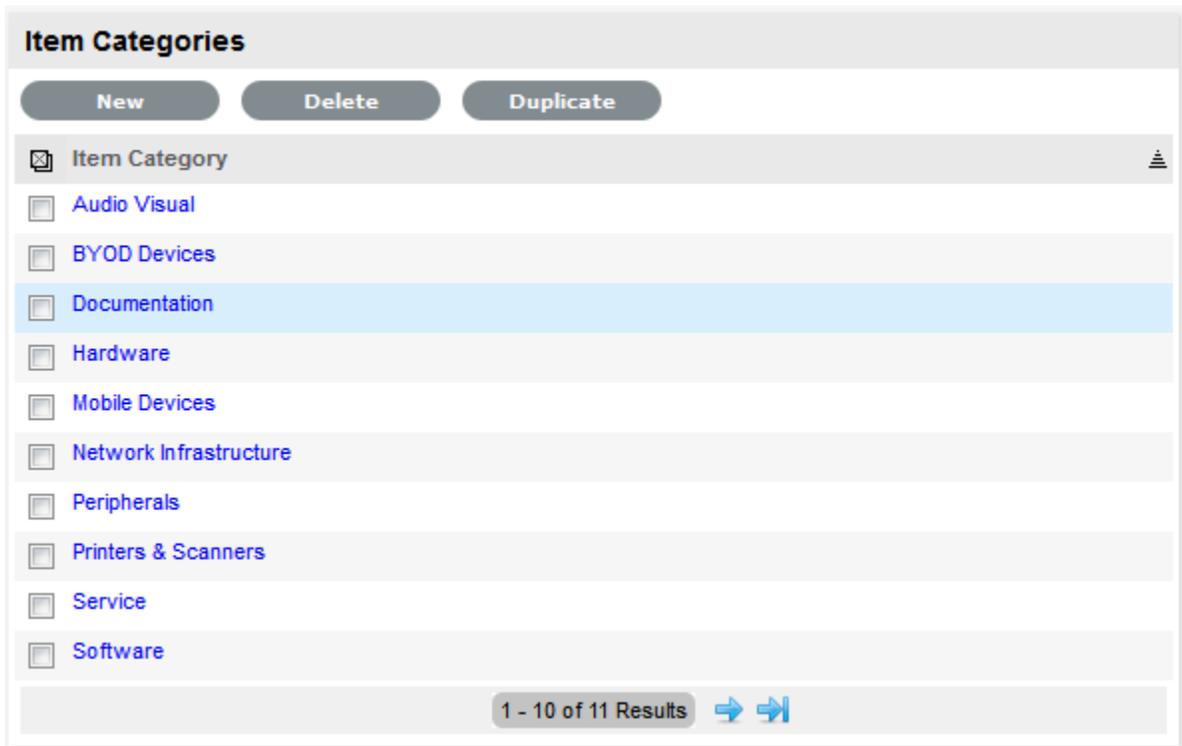
- ◆ [“Configuration Categories” on page 578](#)
- ◆ [“Category Lifecycle” on page 587](#)
- ◆ [“Classifications Tab” on page 593](#)
- ◆ [“Responses Templates” on page 597](#)
- ◆ [“Item Category Types” on page 600](#)
- ◆ [“Federation Tab” on page 600](#)

Configuration Categories

Within the application the number of Item Categories that can be defined is unlimited. By default the following Categories are included:

- ◆ Audio Visual
- ◆ Documentation
- ◆ Hardware
- ◆ Mobile Devices
- ◆ Network Infrastructure
- ◆ Peripherals
- ◆ Printers & Scanners
- ◆ Software
- ◆ Service.

Within each Category the Lifecycle and Classifications associated with the Category can be defined.



Categories Tab

The default templates set at the Category level are used to cover a broad range of Item Types. Within each default Category the following have been configured, but can be customized as required:

- ♦ The Field Labels that will be available on the Details tab of Items using the Category
- ♦ The broadest level of Classifications that are assigned as part of the request creation process.
- ♦ The Lifecycle stages an Item will move through from being proposed or ordered to decommissioned
- ♦ Template responses that Technicians can use when entering a Note for a request that is assigned an Item that uses a Category.

The following table illustrates how Categories can be represented as Manufacturer Models within the Configuration>Types tab:

Category	Proposed Item Type
Hardware	PCs, Servers, Notebooks
Networking Infrastructure	Routers/Switches, UPS, Cabinets, Racks
Mobile Devices	iPhones, PDAs, Windows MDs
Peripherals	Monitors, External Storage Devices, Docking Stations, Barcode Scanners
Audio Visual	Projectors, Electronic Whiteboards
Printers/Scanners	Printer, Scanner
Digital Cameras	Digital Still, Digital Video, Thermal Image
Software	Operating Systems, Databases, Applications
Service	Email, Website.

The easiest way to create additional Categories, is to duplicate a default Category and tailor it to the organizational requirements.

A Service Portfolio Team can be assigned to the default Service Category by creating the Team within the User>Teams screen, then selecting Edit within the Categories tab of the Service Item Category.

Creating a Category

1. Select Configuration>Categories
The Item Categories screen appears.
2. Click New

The screenshot shows the 'Item Categories' form with the following fields and options:

- Category** (tab selected)
- Name**: Text input field containing 'New Category'
- Description**: Text input field (empty)
- Item No. Validation**: Radio buttons for 'Yes' and 'No' (with 'No' selected)
- Service Category**: Checkable box (unchecked)
- Fields**: Section containing 'Generated on Save'
- Buttons**: 'Cancel' and 'Save' buttons at the bottom right.

3. Enter the name of the new Category
4. Complete the Description
Content entered in this field is visible when the User scrolls over the Category Name in the Item Category list.

5. Click Save

The Item Categories screen expands to display the options to upload an Item Category icon and customize Field labels.

NOTE: The Item No. Validation option is displayed, if the Admin>Setup>Privileges>System> Edit Item Numbers is set to Yes

This displays the Input Mask and User Mask fields, which are explained in the Categories Fields table below.

1. Check the Service Category field if the template is to be used for a Service Item

Ticking this option displays the Portfolio Team drop-down list, if [Service Portfolio Teams](#) have been created within the application. This allows Groups within the Service Portfolio Teams to be assigned to the different stages of the Item Lifecycle, and activates Service Catalog Management functionality within the [Cost Tabs of Types and Items](#) that use the template.

NOTE: Customers cannot create Items using Item Categories that have the Service Category option enabled

Item Categories

Category Lifecycle Classifications Responses Types

Duplicate sample category

Category

Name: sample category

Service Category

Description: new sample category

Item No. Validation: Yes No

Icon:

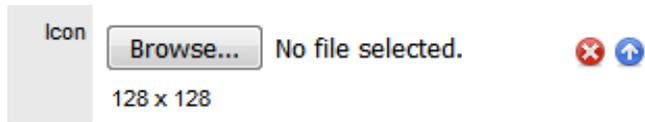
Fields

Ordering: Alphabetical System User Defined Actions:

Label	Data Type	Field	Style	Active	Required
<input type="checkbox"/> Field 1	String	field1	Text	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Field 10	String	field10	Text	<input checked="" type="checkbox"/>	

1. Select the icon to be replaced, to change the Icon image for the Item Category

This icon is used as the generic visual representation of the Item Category in the Relationship Map. This can also be refined at the Item Type level.



Use the  to upload a new image or  to cancel the upload.

NOTE: The dimensions of the uploaded icon must be exactly 128 x 128 pixels

2. Customize the Field Labels

Custom fields are visible in the Details tab of Items that use the Category.

Click the Field Label link to open it in Edit mode and display the following options:

Categories Fields	Description
Category	
Field Label	The name defines what attribute information is to be recorded in the field.
Active	Indicates if the field will be visible in the Details tab of an Item.
Required	Indicates if the field is required or mandatory field.
Customer Visible	Defines if the Customer can see the field within the Customer Portal. If Yes is selected, define if the Customer can edit the field information on the Customer Portal.
Data Type	Dictates the field's Data Type. The options available include : <ul style="list-style-type: none"> ◆ String - List or Free Text ◆ Number ◆ Boolean - radio buttons for Yes/No and True/False ◆ Date - creates a date field ◆ Currency- creates a currency field ◆ Hyperlink.
Style	States the style of the field. eg. String- List or Free Text field.
Unique Value	When active, the system prevents the duplication of data within the customized field.
Default Value	Value entered is the default system entry for the field, when the field is not completed manually.

Categories Fields	Description
Input Validation	<p>When enabled the Input Mask and User Mask can be defined.</p> <p><i>Input Mask</i> : A regular expression to use for data validation of values entered by a User (i.e., Zip/Post Code, telephone no.)</p> <p><i>User Mask</i>: A "User Friendly" representation of the Input Mask that Customers can understand should it appear in a validation error message.</p>
Enable Description	<p>When enabled a Description field appears, allowing the User to enter details of what information the field is expected to capture. These details are accessible next to the custom field on the relevant screen.</p>

3. Click Save to complete the field label configuration

Continue to customize all fields as required.

4. Define the ordering preference

The option defined here dictates how the fields appear on the Item Details tab.

To move a field, select the checkbox beside the field label followed by the   to move the label up and down the list. To multi-select fields, tick the checkboxes beside the label name and click  to activate or  to deactivate the fields.

The field order can be set to:

- ◆ Alphabetical - the fields will be presented according to the alphabet order of the first letter.
- ◆ System - the fields will appear in the order they are entered into the system.
- ◆ User Defined - the fields can be manually adjusted by the User using the system buttons.

5. Click Save.

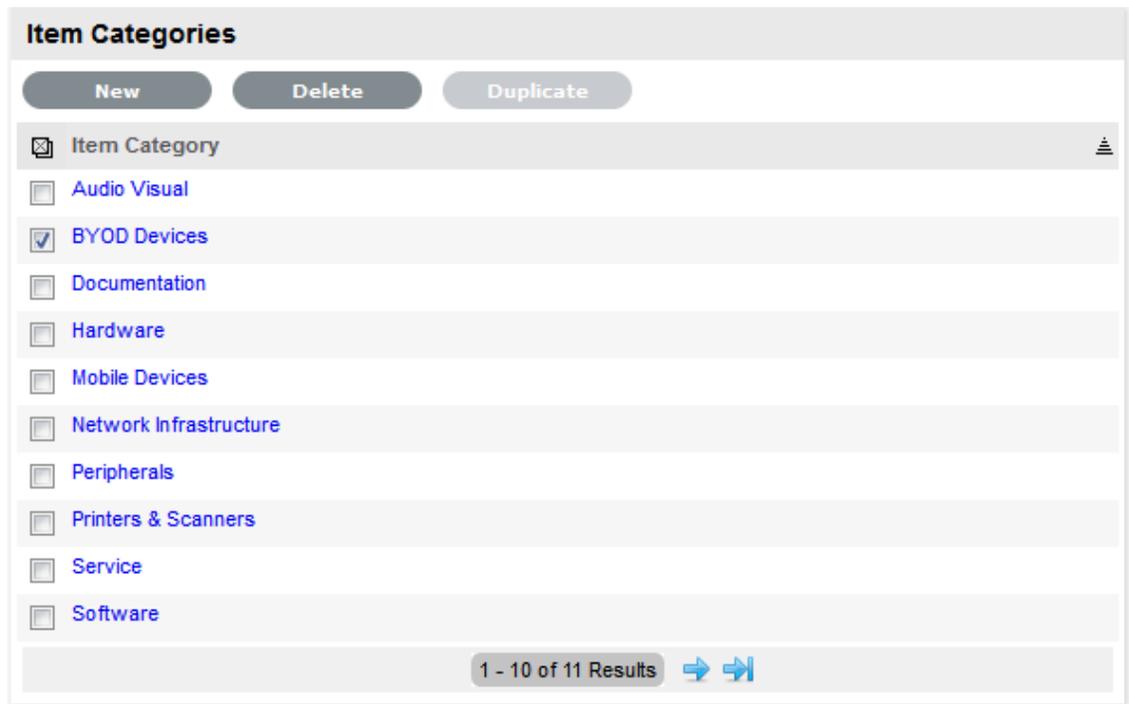
Modify the Category [Lifecycle](#), [Classifications](#), [Responses](#) and, if the system is synched with more than one asset management discovery tool the [Federated](#) templates, if necessary.

Duplicating a Category

To fast track the creation of an Item Category, each can be duplicated.

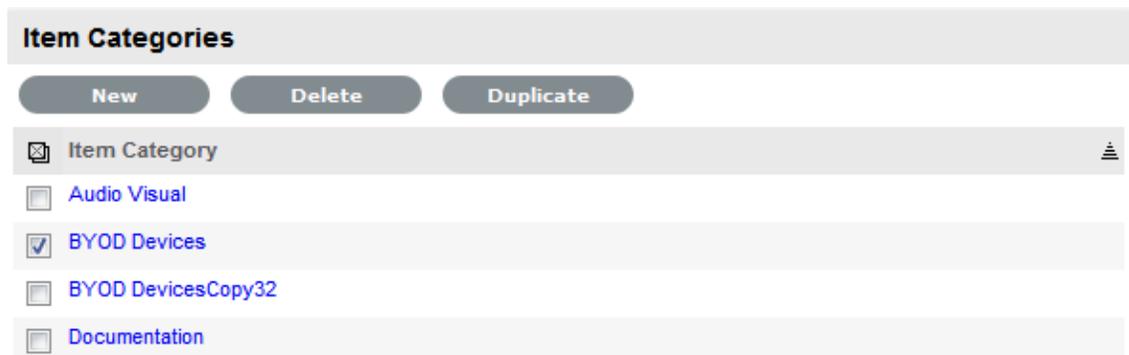
To duplicate an existing Category:

1. Select Configuration>Categories
2. Tick the box to the left of the Category name



3. Click Duplicate

A new Category hyperlink is added to the Category list. The new Category will contain the same custom fields, lifecycle and classifications of the original Item Category.



4. Modify the new Category as required.

Editing and Configuring an Item Category Template

After an Item Category has been duplicated it can be modified to represent the new Item Category.

To edit a Category:

1. Select Configuration>Categories
2. Click on the appropriate hyperlink
The screen defaults to the Categories>Categories tab.
3. Click Edit
4. Enter the name of the new Category
5. Complete the Description

Content entered in this field is visible when the User scrolls over the Category Name in the Item Category list.

6. Click Save

The Item Categories screen expands to display the options to upload an Item Category icon and customize Field labels.

NOTE: The Item No. Validation option is displayed, if the Admin>Setup>Privileges>System> Edit Item Numbers is set to Yes. This displays the Input Mask and User Mask fields, which are explained in the Categories Fields table at Point 9.

1. Check the Service Category field if the template is to be used for a Service Item

Ticking this option, displays the Portfolio Team drop-down list, if [Service Portfolio Teams](#) have been created within the application. This allows Groups within the Service Portfolio Team to be assigned to the different stages of the Item Lifecycle, and activates Service Catalog Management functionality within the [Cost Tabs of Types](#) and [Items](#) that use the template.

NOTE

Item Categories

Category Lifecycle Classifications Responses Types

Duplicate sample category

Category

Name: sample category

Service Category

Description: new sample category

Item No. Validation: Yes No

Icon:

Fields

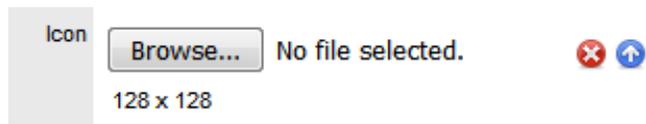
Ordering: Alphabetical System User Defined Actions:

Label	Data Type	Field	Style	Active	Required
<input type="checkbox"/> Field 1	String	field1	Text	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Field 10	String	field10	Text	<input checked="" type="checkbox"/>	

Customers cannot create Items using Item Categories that have the Service Category option enabled

1. Select the icon to be replaced, to change the icon image for the Item Category

This icon is used as the generic visual representation of the Item Category in the Relationship Map. This can be refined at the Item Type level.



Use the  to upload a new image or  to cancel the upload.

NOTE: The dimensions of the uploaded icon must be exactly 128x128 pixels

Version 7.0 will not apply these icons in the Relationship Map, but they will be used in a future release

1. Customize the Field Labels

Custom fields are visible in the Details tab of Items that use the Category.

Click the Field Label link to open it in Edit mode and display the following options:

Categories Fields	Description
Category	
Field Label	The name of the field.
Active	Indicates if the field is active.
Required	Indicates if the field is required or mandatory field.
Customer Visible	Defines if the Customer can see the field within the Customer Portal. For a Service Category, if it is relevant to display costs or other specific details regarding a Service on offer in the Services Tab of the Customer Portal, then set relevant attribute fields to being Customer Visible.
Data Type	Dictates the field's Data Type. The options available include : <ul style="list-style-type: none"> ◆ String - List or Free Text ◆ Number ◆ Boolean - radio buttons for Yes/No and True/False ◆ Date - creates a date field ◆ Currency- creates a currency field ◆ Hyperlink.
Style	States the style of the field. eg. String- List or Free Text field.
Unique Value	When active, the system prevents the duplication of data within the customized field.
Default Value	Value entered is the default system entry for the field, when the field is not completed manually.

Categories Fields	Description
Input Validation	<p>When enabled the Input Mask and User Mask can be defined.</p> <p><i>Input Mask</i> : A regular expression to use for data validation of values entered by a User (i.e., Zip/Post Code, telephone no.)</p> <p><i>User Mask</i>: A "User Friendly" representation of the Input Mask that Customers can understand should it appear in a validation error message.</p>
Enable Description	<p>When enabled a Description field appears, allowing the User to enter details of what information the field is expected to capture. These details are accessible next to the custom field on the relevant screen.</p>

2. Click Save to complete the field label configuration

Continue to customize all fields as required.

3. Define the ordering preference

The option defined here dictates how the fields appear on the Item Details tab.

To move a field, select the checkbox beside the field label followed by the   to move the label up and down the list. To multi-select fields, tick the checkboxes beside the label name and click  to activate or  to deactivate the fields.

The field order can be set to:

- ♦ Alphabetical - the fields will be presented according to the alphabet order of the first letter.
- ♦ System - the fields will appear in the order they are entered into the system.
- ♦ User Defined - the fields can be manually adjusted by the User using the system buttons.

4. Click Save.

Modify the Category [Lifecycle](#), [Classifications](#), [Responses](#) and, if the system is synched with more than one asset management discovery tool, the [Federated](#) templates, if necessary.

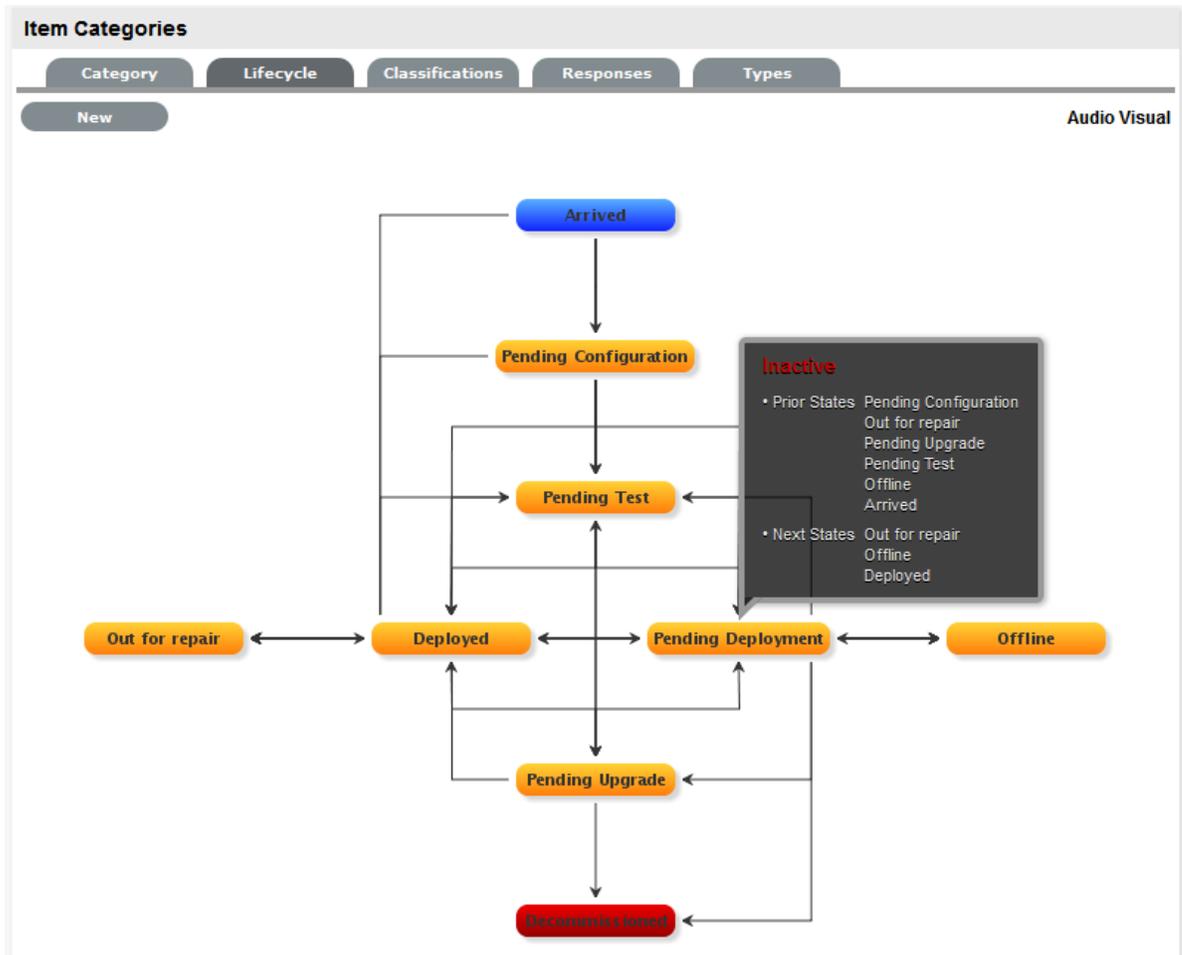
Category Lifecycle

The Lifecycle details the stages of life for a Configuration Item. This allows Items to be tracked from the conceptualization/purchase stage through to being decommissioned/discarded, and can be used to indicate availability levels throughout the Lifecycle.

The States configured here are used within the Item information screen and allow the User to easily see if an Item is at a start or end point of its life, whilst also indicating if the Item is available or not. If an Item is moved to an Offline state, this information is also used on the Outage pages, for easy reference.

By default, the system is installed with some pre-defined Lifecycles, which are displayed with the three types of States:- Previous, Current and Next. Based on the configuration of the Current State, the listings displayed in the Previous or Next column show where an Item can move to from the Current State.

If the default Lifecycles do not match the requirements of the service and support organization, they can be customized. To avoid confusion, it is suggested that the default Lifecycle States be erased completely if they are not relevant to your organization.



Creating a Lifecycle

NOTE: It is recommended that all Lifecycle States be written down and mapped before this process is started.

1. Select Configuration>Categories
2. Click on the Item Category hyperlink
3. Move to the Lifecycle tab
4. Click the Current State hyperlink to edit the State, or, click New to create a new transitional State
The States/Status screen appears.

Item Categories

Category
Lifecycle
Classifications
Responses
Types

Audio Visual

Status

Name

Active State Yes No

Offline State Yes No

Customer Visible Yes No

Entry Point

Exit Point

Previous States

Available states

Deployed
 Arrived
 Pending Configuration
 Pending Test
 Pending Deployment
 Pending Upgrade

▶

Selected states

None selected

Next States

Available states

Deployed
 Pending Configuration
 Pending Test
 Pending Deployment
 Pending Upgrade
 Out for repair

▶

Selected states

None selected

Cancel
Save

5. Rename the State as required
6. Complete the State configuration:

	Description
Status	
Name	Enter the name of the Lifecycle State.
Active State	Stipulates if the Item is Active, when assigned this State.
Offline State	Only visible when Active is set to No. Indicates if the Item is offline and inactive. Items moved into states where this is enabled, have availability metrics calculated.
Customer Visible	When selected, Items in this State are visible in the Customer Portal

	Description
Pre-production State	Only visible for Service Category lifecycle states. Items that use this state are available within the Service Pipeline filter view of the Configuration>Items tab.
Entry Point	An Entry Point is used to indicate the start of a Lifecycle. To make the state a Workflow Entry Point, select the Entry Point checkbox. As the Entry Point is the first state, the Previous States field will be removed.
Exit Point	Select whether the state will be an Exit Point. An Exit Point is used to indicate the end of a Lifecycle.
Listener Class	This field is visible if the Outbound Webservices option is enabled in the Admin>Setup>Privileges>System tab. Complete this field, if assigning an Item to this State is to trigger an event in an external system. This field should contain the name of a Java class that implements the interface <code>com.livetime.ws.listen.LifecycleListener</code> that has been compiled into a jar file and added to the LiveTime classpath. Please contact support for further details.

NOTE: It is advised Users enter the list of all States, before defining any relationships to Previous or Next States

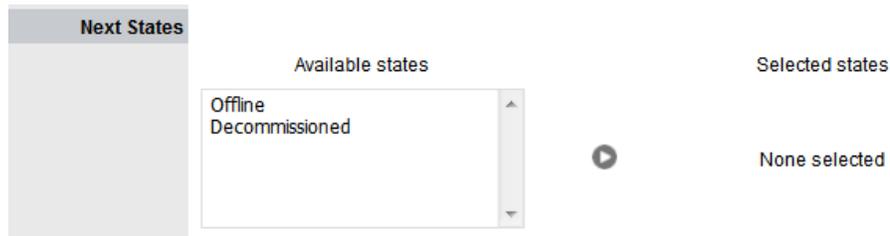
1. To return to the Lifecycle Current State list, save the updated State information
2. Continue editing, adding or deleting States until all relevant transitional States exist within the Lifecycle
After each Lifecycle State has been configured, the Lifecycle itself should be mapped.
3. Select a Current State hyperlink to configure the Previous State or Next State options,
Using all Available States entered in the Lifecycle, define the status direction options of an Item that uses this Item Category template.

	Description
Status	
Previous States	If the State is not an Entry Point, use the arrow button to select Previous States from the Available States.
Next States	If the State is not an Exit Point, use the arrow button to select the Next States.
Available States	Lists all the possible States that can be included in the Lifecycle.
Selected States	Lists the states that have been included as a Next or Previous State of the Lifecycle.

NOTE: When a State is used as a Previous or Next State, it allows an Item to move forward and backward in a Lifecycle

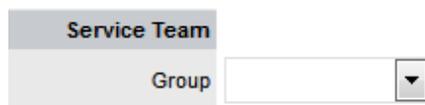
An Entry Point State cannot have any previous States and an Exit Point State cannot have any Next States.

1. Highlight the relevant States in the Available States box
2. Click the arrow pointing towards the Selected States box



3. When all States have been allocated, click Save
4. Save the assignment, and complete the process for all stages of the Item Lifecycle
5. Customise settings if editing a Service Category

Assign a Group within the associated Service Portfolio Team, this will allow these Users to edit the Item details when assigned this stage of the Category Lifecycle



6. Click Save.
Move to the Classifications tab, to define request Classifications for the Item.

Deleting a State

It may be necessary to delete a system default State or a State that is no longer in use. Note that a State cannot be deleted if it has been assigned to an Item.

To delete an unused State:

1. Select Configuration>Categories
2. Click on the Item Category hyperlink
3. Move to the Lifecycle tab
4. Select the Current State link
5. Click Delete.

Item Lifecycle Example

In this example the Item Category Hardware has a Lifecycle State of Arrived. This State is inactive and an entry point. Items assigned this State would not be visible on the Customer Portal.

After this State is assigned to an Item, the next State that the Item can move to is any of the States listed within the Selected States list (i.e., Deployed, Pending Configuration, Pending Test, Pending Deployment or Out for Repair).

Setting up the Lifecycle Status "Arrived"

Item Categories

Category Lifecycle Classifications Responses Types

Network Infrastructure

Status

Name

Active State Yes No

Offline State Yes No

Pre-production State Yes No

Customer Visible Yes No

Entry Point

Exit Point

Previous States

Lifecycle entry points do not have 'previous' states

Next States

Available states

- Pending Upgrade
- Offline
- Decommissioned

Selected states

- Deployed
- Pending Configuration
- Pending Test
- Pending Deployment
- Out for repair

Service Team

Group

Delete Cancel Save

Assigning the Lifecycle Status of Arrived to an Item with the Category Hardware

NOTE: The Item Status list contains all the States defined as Next States for the Arrived Status.

Item Information

Information Details Costs Requests Relationships Outages AMIE Snapshots

Duplicate Print Item # 100010 (Dell Latitude E6430)

Number 100010

Category Hardware

Type Dell Latitude E6430

Request Team Service Request Team

Incident Team Device-Incident Team

Problem Team Problem Analysis Team

Change Team Change Management Team

Status Arrived

Criticality

Service Level

Ownership

Customers

Org. Units Micro Focus - Accounts Dept

Affects 3 Users

Find Item Type (Name)

Find Customer (Last Name)

Find Org. Unit (Name)

Delete Cancel Save

Classifications Tab

- ◆ [“Classifications Tab” on page 593](#)

Category Classifications that are used to define and group issues are created within this tab. These are applied to requests that are logged against Items based on the Item Type Category template. The Classifications are also used by the system for proactive Incident analysis when automatically identifying Problems.

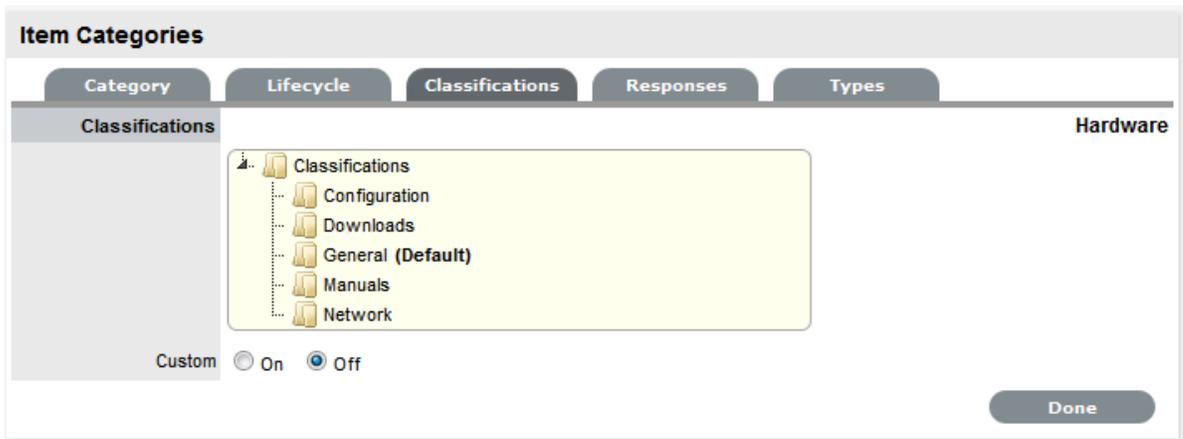
Category Classifications are used for generic grouping of issues relevant across all Item Types that use a Category. Supervisor Users can define additional Classifications for specific Item Types, within the Configuration>Categories>Item Categories>Classification tab.

The system is installed with several default Classification Type Categories, which can be edited as required.

NOTE: The General Classification is owned and used by the system and cannot be deleted. It is also advised that this Classification not be renamed, as this is the Classification assigned to requests when they are created via email.

Classifications Tab

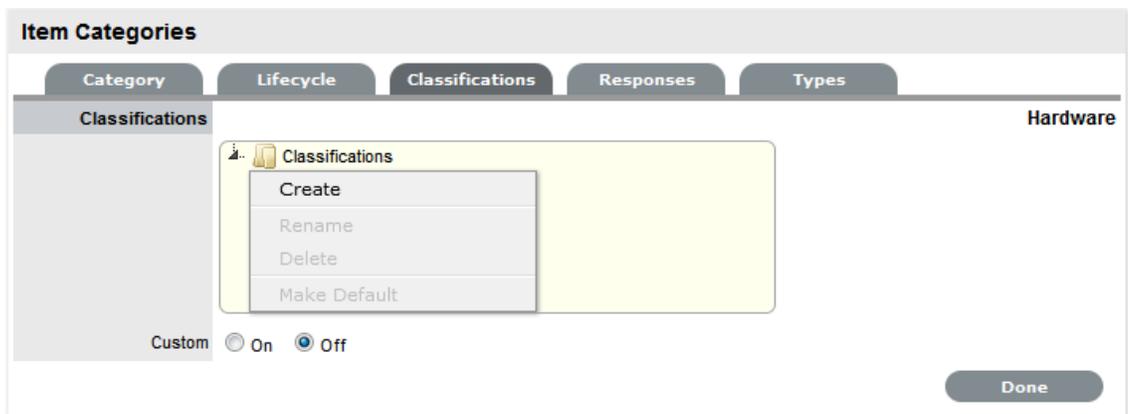
Additional Classifications can be created for each Item Category, while the system provided Classifications can be renamed or deleted. The Custom facility, when enabled, allows Users to add Classifications during the request creation process.



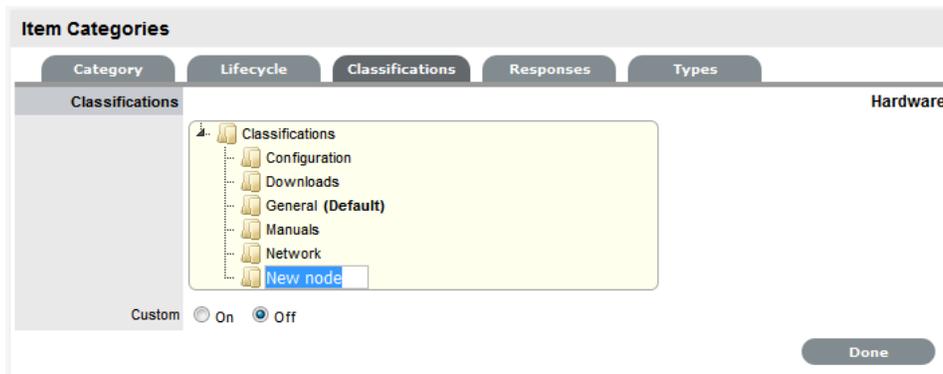
Creating a New Item Category Classification

To add a new Classification:

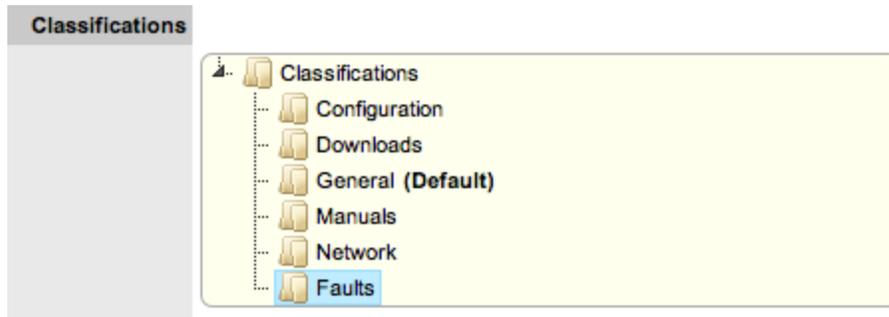
1. Select the Classification tab of an Item Category
2. Right-click on the Classifications header
3. Select Create



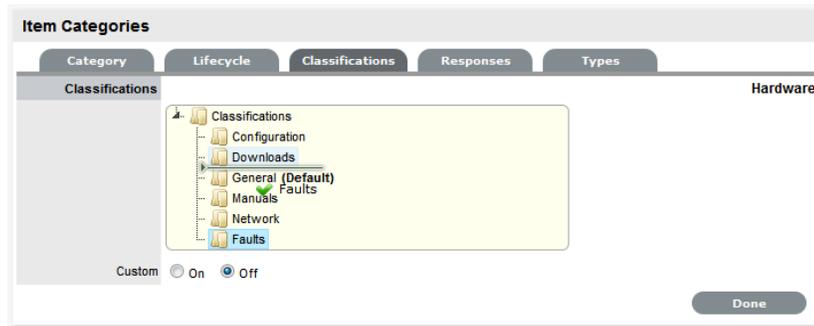
4. Enter the details in the newly created node



5. Click outside the text box to commit the entry listing



6. Repeat the above process to create all required list entries
7. Move an existing Classification to a new position, if required
Select the entry, then drag and drop the entry into its new location.



8. Click Save.

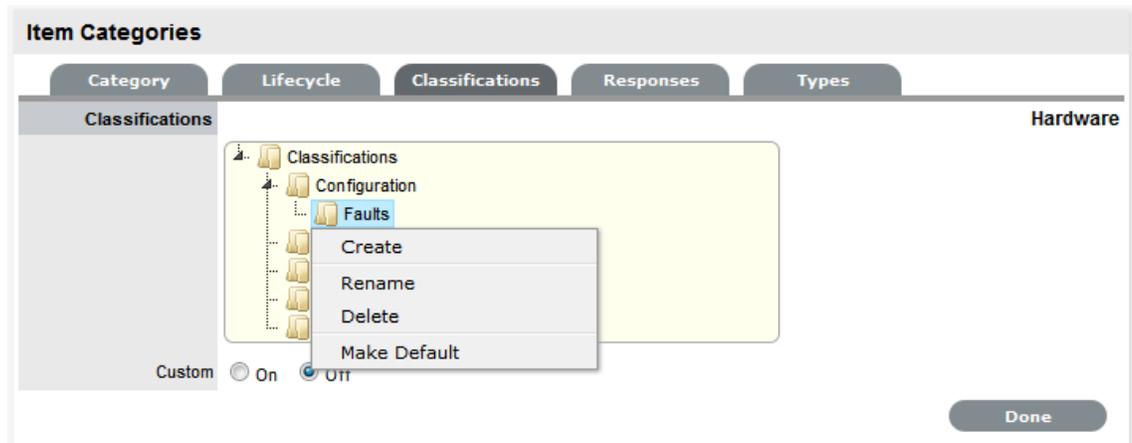
Creating Sub-Classifications

Classifications can be expanded to include nested Classifications.

To create Sub-Classifications:

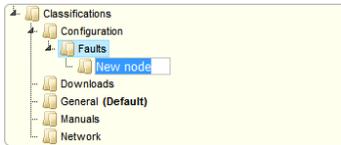
1. Right-click the relevant Classification header

The Create, Rename, Delete and Make Default options are displayed.



2. Select Create

A text box will appear under the Classification.



3. Enter the name for the list entry
4. Click away from the text box to commit and save the change
5. Move an existing Classification to a new position, if required
Select the entry, then drag and drop the entry into its new location
6. The above steps can be repeated until the sub-category list is completed.

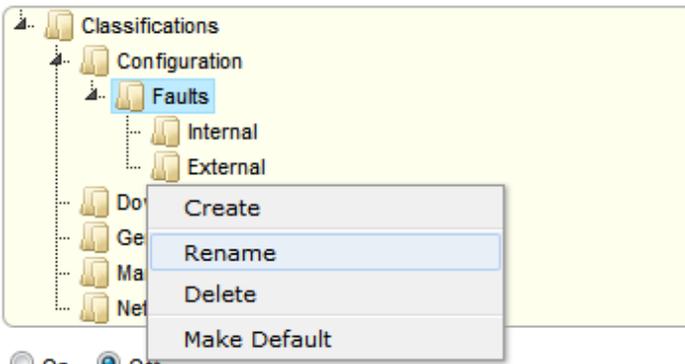


Renaming a Classification

Any Item Category Classification can be renamed.

To rename a Classification:

1. Right-click the Classification



2. Click Rename
3. Edit the field content
4. Click away from the text field to save the change.

Deleting a Classification

To delete a Classification:

1. Right-click the relevant list entry
2. Click Delete
3. Click Done when the Classification Categories are complete.

Responses Templates

The Responses tab within an Item Category allows the Supervisor to define template replies for Notes sent related to requests received against the Item Category. This ensures the service desk responds to issues in a consistent manner, and in line with the support organization's policies and protocol. Additional templates can be configured within the Item Type>Responses tab. These templates are only available for requests related to the Item Type.

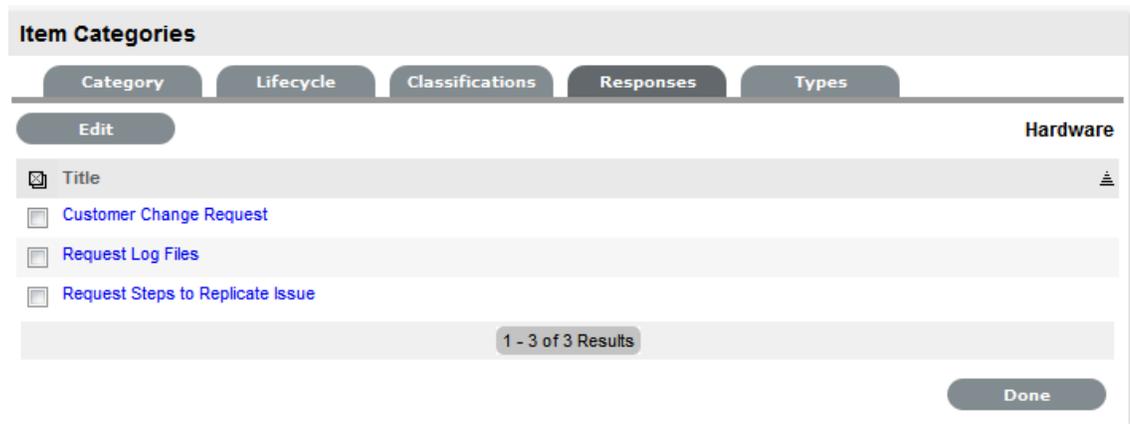
The following screen displays a list of default template options available within the Notes tab of a request:

The screenshot shows the 'Add Note' dialog box. At the top, there's a title bar with 'Add Note' and a close button. Below the title bar, there's a 'Note Time' field with a plus sign and a dropdown arrow, set to '0 (Minutes)'. To the right of this is a timestamp '01/20/16 10:22' and a 'Select a template...' dropdown menu. Below these is a rich text editor toolbar with options for 'Format', 'Font Family', 'Font Size', 'HTML', 'Bold', 'Italic', 'Underline', 'ABC', 'List', 'Quote', 'Align', 'Link', and 'Unlink'. The text area of the editor contains '----- Initial Description -----' and 'Change Request - Item has been marked for creation'. At the bottom of the dialog, there's an 'Attachments' field with a dropdown arrow and plus/minus buttons. To the right of this are 'Visibility' options (Private and Public, with Public selected) and 'Create Knowledge' options (Yes and No). At the bottom right, there are three buttons: 'Solution', 'Draft', and 'Add Note'.

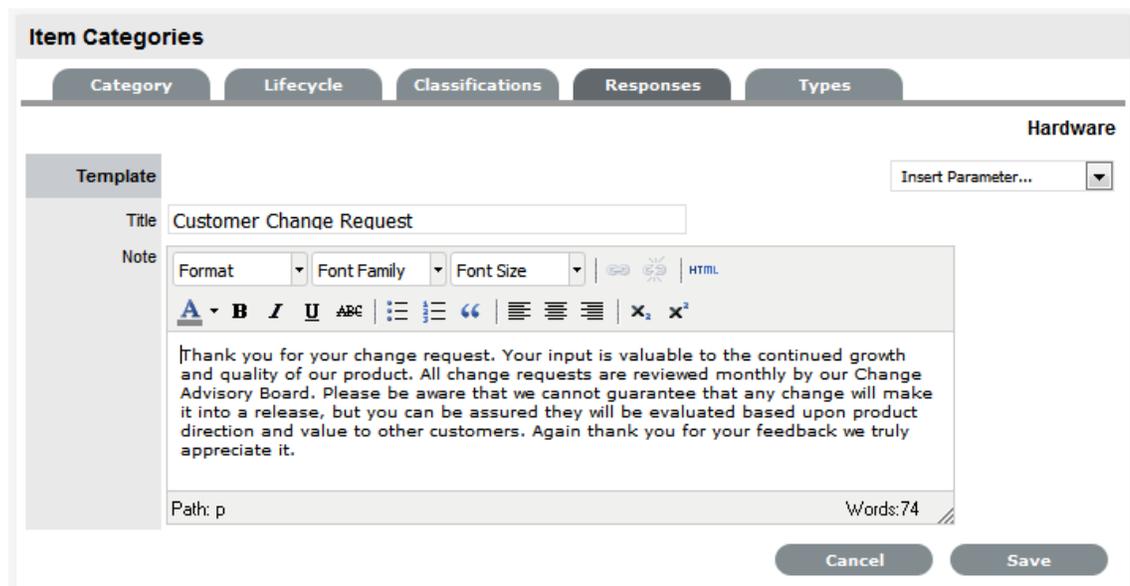
Editing a Template

To edit a Response template:

1. Go to Configuration>Categories
2. Select the hyperlink for the relevant Category



3. Move to the Responses tab
 4. Click Edit
 5. Select the relevant Title hyperlink
- The template contents are displayed.

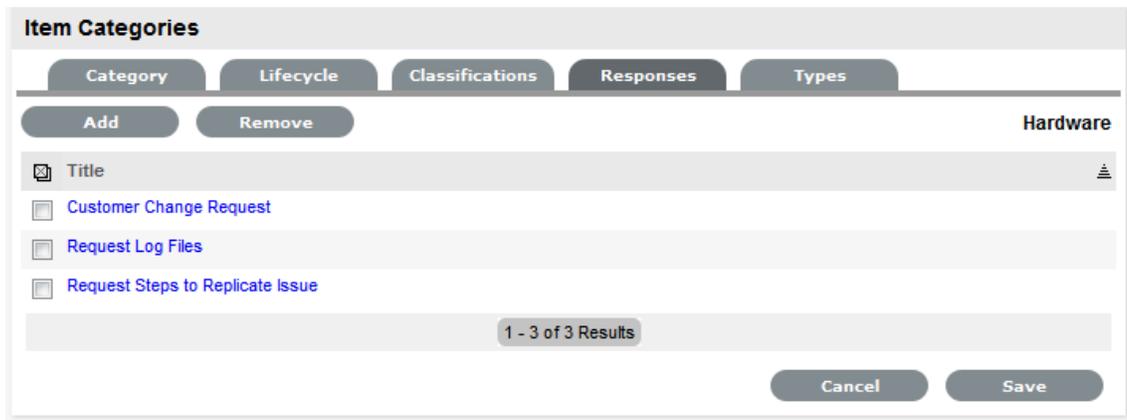


6. Amend the Note template and insert any relevant parameters
7. Click Save.

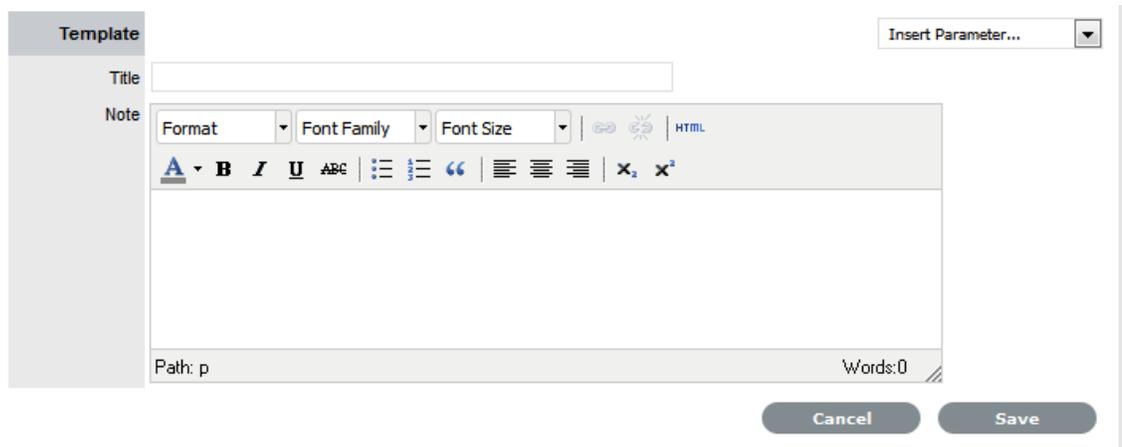
Adding a Template

To add a Note template:

1. Go to Configuration>Categories
2. Select the hyperlink for the relevant Category
3. Move to the Responses tab
4. Click Edit



5. Click the Add button
6. Enter the template Title

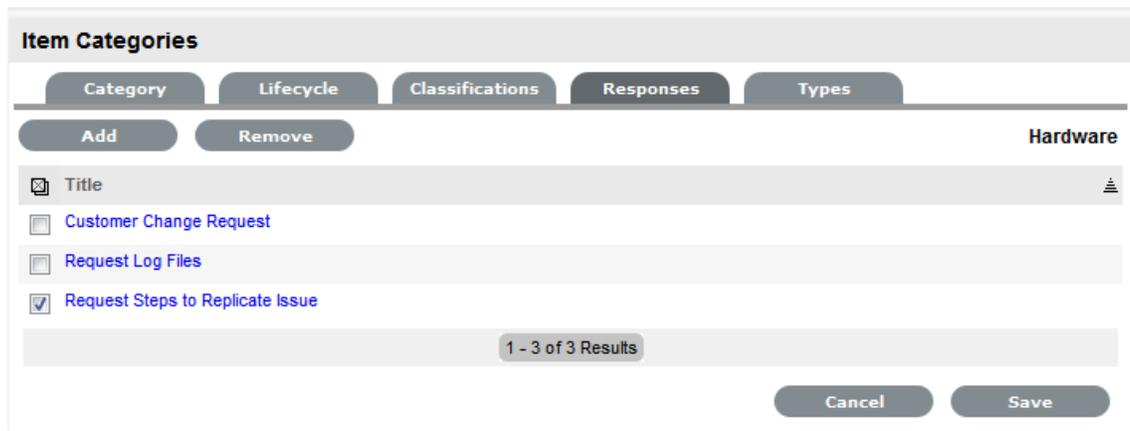


7. Complete the content for the Note and Save.

Deleting a Template

To delete a template:

1. Go to Configuration>Categories
2. Select the hyperlink for the relevant Category
3. Move to the Responses tab
4. Click Edit



5. Check the box in the column next to the template Title
6. Click the Remove button.

Item Category Types

The Types tab lists all Item Types that have been created using the selected Category.



Federation Tab

(This tab is only visible when two or more asset management tools are synched within AMIE as configured in Admin>Setup> AMIE tab.)

The Federation tab is used to build the Category Map, which allows for information sourced from multiple asset management systems for a single asset to be recorded against one Item in the CMDB. Based on the map built here, fields within the Item Details tab are populated when [AMIE snapshots](#) are applied to new or updated Items.

Creating a Category Map

Within the relevant Category:

1. Go to the Federation tab
2. Click Edit

The system will open each field to display the asset management tools that are configured within AMIE, in the Admin>Setup>AMIE tab.

3. Assign the asset tool source from the pop-up options for each field

The Item Number, Item Type and Manufacturer are included for Categories.

NOTE: Defining a source for the Item Type and Manufacturer is mandatory

4. Complete one or two of the Snapshot Merge fields

The Snapshot Merge fields are used by the system to verify the identity of an Item across the asset management tools configured in AMIE, when synchronizing Item Details from multiple sources.

5. Click Done.

The screenshot shows the 'Item Categories' configuration interface. It features a top navigation bar with tabs for 'Category', 'Lifecycle', 'Classifications', 'Responses', 'Types', and 'Federation'. The 'Category' tab is selected, and the category is set to 'Hardware'. The form is divided into several sections: 'Details' with fields for 'Item Number', 'Item Status', and 'Item GUID'; 'Item Type' with fields for 'Type' and 'Manufacturer'; 'Relationship' with a 'Configuration' field; and 'Fields' with a 'CPU' field. All dropdown menus are currently set to 'ZENworks Configuration Management v11' or 'Spiceworks v4.0 (Spiceworks)'.

2.6.9 Vendors

A summary of Supplier and Service Provider details is displayed within the Vendor List.

The screenshot displays the 'Vendor List' interface. At the top, there are buttons for 'New', 'Delete', and 'Search', along with a 'Display: 10' dropdown menu. Below this is a table with the following columns: 'Name', 'Type', 'Contact Name', 'Contact Email', and 'URL'. The table contains two rows of data:

Name	Type	Contact Name	Contact Email	URL
EP1	Service Provider			
A	Service Provider			

At the bottom of the table, a status bar indicates '1 - 2 of 2 Results'.

The following types of Vendors are defined within the system:

- ♦ *Service Provider*: Vendors who supply a service and whose details are used within the Underpinning Contracts functionality of the application
- ♦ *Supplier*: Vendors who provide goods to the organization and whose details are used within the Purchase Order functionality of the application. This may differ from the Manufacturer of an Item, as the Supplier may not necessarily be the company that makes the Item.

Creating a Vendor

To create a new Vendor:

1. Select Configuration
2. Select Vendors
3. Select New to display the Vendor Details screen

The screenshot shows the 'Vendor Editor' interface with the 'Details' tab selected. The form contains the following fields:

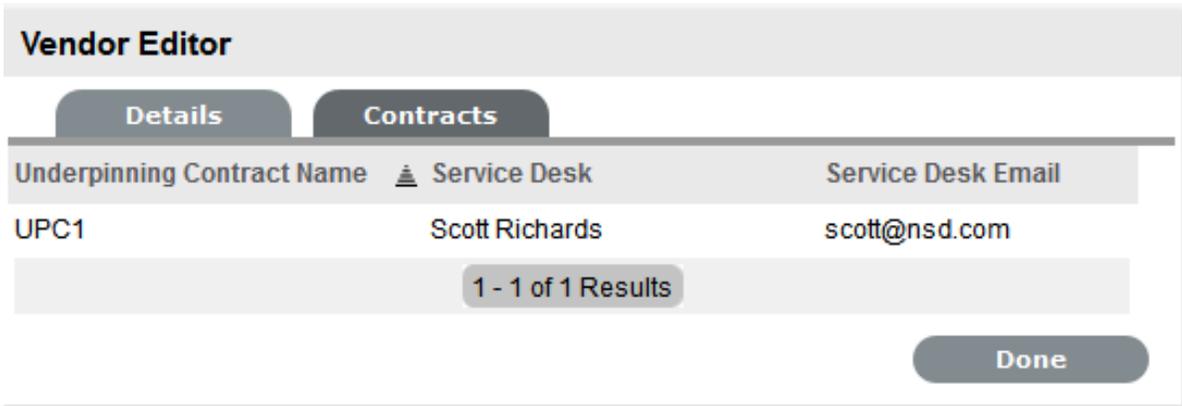
- Vendor Name: New Vendor
- Type: Service Provider (dropdown menu)
- Address: Service Provider (dropdown menu)
- City: [Empty text box]
- State: [Empty text box]
- Zip: [Empty text box]
- Country: [Empty dropdown menu]
- Phone: [Empty text box]
- Fax: [Empty text box]
- Contact Name: [Empty text box]
- Contact Email: [Empty text box]
- URL: [Empty text box]
- Notes: [Empty text area]

Buttons for 'Cancel' and 'Save' are located at the bottom right of the form.

4. Enter the Vendor Name, required
5. Define the Vendor Type, Service Provider or Supplier
6. Enter other relevant contact information, optional
7. Click Save.

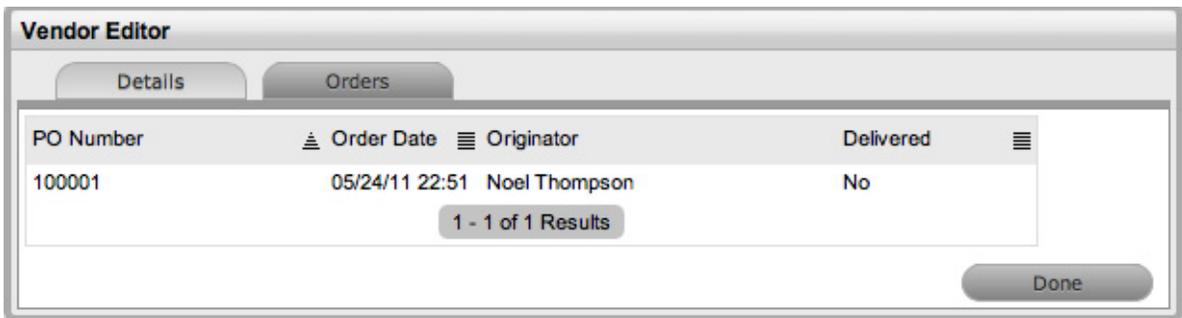
Vendor - Service Provider

When a Service Provider Vendor details are saved, a Contracts tab becomes visible. All Underpinning Contracts assigned to a Service Provider are listed within the Contracts tab.



Vendor - Supplier

When a Supplier Vendor details are saved, an Orders tab is displayed. All Purchase Orders for the Supplier are listed within the Orders tab.



2.6.10 Manufacturers

The details of suppliers who manufacture goods used within the organization can be configured within the Manufacturers tab. The list of Manufacturers configured here form the drop-down list options within the Type Information screen.

Manufacturer details that are created when a new Item Type is entered into the system, are also displayed within this screen.

Creating Manufacturers

To create a Manufacturer within the Manufacturers tab:

1. Go to Configuration > Manufacturers
2. Click New
3. Complete the Details fields as required

The image shows a web form titled "Manufacturer Editor". At the top, there is a tab labeled "Details". Below the tab, there is a sidebar with a "Details" header. The main area contains several input fields: "Manufacturer" (with a red cursor), "Short Name", "Address", "City", "Zip", "Country" (a dropdown menu), "Phone", "Fax", and "URL". At the bottom right, there are two buttons: "Cancel" and "Save".

4. Select Save.

Edit Manufacturer Details

To edit the details recorded within a Manufacturer information screen:

1. Go to Configuration > Manufacturers
2. Select the relevant Manufacturer name hyperlink
3. Click Edit
4. Amend details
5. Click Save.

Deleting Manufacturers

To delete a Manufacturer:

1. Go to Configuration > Manufacturers
2. Select the relevant Manufacturer name hyperlink
3. Select Edit
4. Click Delete if the Manufacturer information is no longer required
A system warning window will be displayed.
5. Click OK.

Manufacturer details that are not in use in the system can be deleted. To delete one or more Manufacturer records within the Manufacturer list:

1. Go to Configuration > Manufacturers
2. Check the field next to the Manufacturer names that are no longer required
3. Click Delete.

2.6.11 Outages

An Outage is when an Item Status is unavailable due to expected or unexpected events. For example, the Item may be out for repair or faulty. To move an Item into an unavailable State, and therefore list it as inactive, the Item Status selected for the Active State option within the [Item Category Lifecycle](#) must be set to No, and the Offline State option set to Yes.

- ◆ “Planned Outages” on page 605
- ◆ “Viewing Outages” on page 607
- ◆ “Customer Portal View” on page 607
- ◆ “Login Page View” on page 608
- ◆ “Planned Outage Page Options” on page 610
- ◆ “Troubleshooting” on page 610

Planned Outages

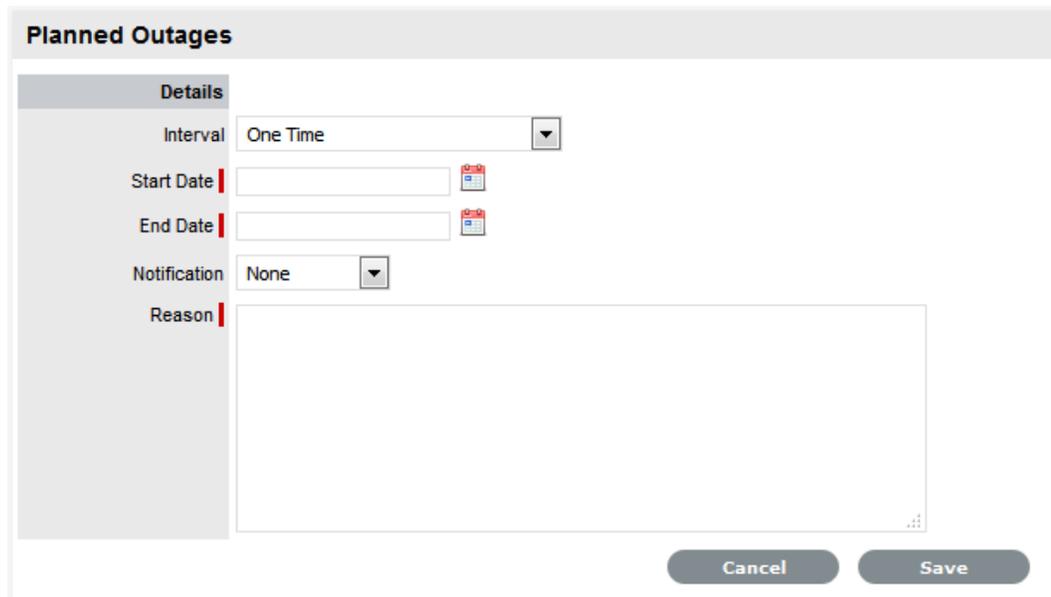
Planned Outages are used to manage Items' proposed unavailability. This is useful for informing Customers and Users about planned changes to infrastructure that may cause an Item to be taken offline or out of service.

If an Item has an SLA with a specified Blackout Period, ideally Outages should be planned to fall within this time. The Blackout Period is an agreement between the Customer and the service provider regarding a period of time when the Customer has no service expectations. This can also be the preferred time for Item upgrades and maintenance without affecting service availability. To access the Blackout Period details for an SLA associated with an Item, create the Planned Outage within the [Outages tab](#) of the Item Information screen.

Creating a Planned Outage

To create an Outage:

1. Select Configuration > Outages
2. Click New



The screenshot shows a web form titled "Planned Outages". The form has a "Details" section with the following fields:

- Interval:** A dropdown menu currently set to "One Time".
- Start Date:** A text input field with a calendar icon to its right.
- End Date:** A text input field with a calendar icon to its right.
- Notification:** A dropdown menu currently set to "None".
- Reason:** A large, empty text area for entering the reason for the outage.

At the bottom right of the form, there are two buttons: "Cancel" and "Save".

3.

Planned Outages

Details	Description
Interval	Select One Time if the Outage is a one off, or set regular outages based on a weekly or monthly basis.
Start Date	Select the Start Date within the calendar, and modify the Time accordingly inside the calendar pop-up.
End Date	Select the End Date within the calendar, and modify the Time accordingly inside the calendar pop-up.
Notification	Select Email or SMS Notification about the Outage is to be sent to the Primary Contact of the Org. Unit, or All Customers/Owners associated with the Item.
Reminder	This option is displayed when a Notification is set for the Outage. If a Reminder notification is to be applied to the Outage, check the box and define the period of time prior to the Planned Outage period that the reminder is to be issued.
Reason	Enter a description that details why a Planned Outage is being scheduled.

4. Define the Interval for the Outage

The options of One Time, Weekly and Monthly are available.

5. Set the Outage Start and End dates

6. Set the Notification method and recipients

These are applied when the Outage is saved.

7. Tick the Reminder Email field

If a reminder is to be emailed to defined recipients prior to the Outage time. Define the length of time before the Outage occurs that the reminder is to be sent.

Notification: Email (dropdown), Primary Contacts (dropdown)
Reminder: 24 hours (dropdown) before outage.

8. Enter the Reason for the Outage

9. Click Save

The add Items option is displayed.

Items + -

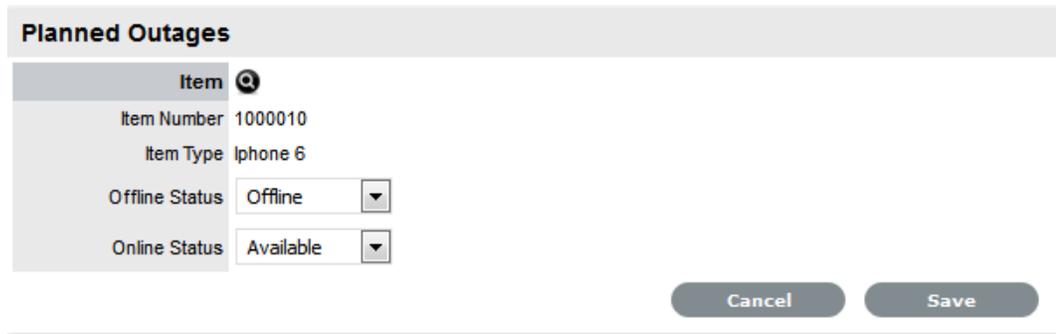
Item Number	Type	Identifier	Status
0 - 0 of 0 Results			

10. Click +

The Find Item/Item Type field is displayed.

11. Enter the known Item Number or Type and click 🔍

- Click the Item Number hyperlink to add the Item to the Outage



The screenshot shows a form titled "Planned Outages". It contains the following fields:

- Item** (with a search icon):
 - Item Number: 1000010
 - Item Type: Iphone 6
- Offline Status: Offline (dropdown menu)
- Online Status: Available (dropdown menu)

At the bottom right of the form are two buttons: "Cancel" and "Save".

- Define the Offline Status and Online Status for the Item

These are the States the Item will be automatically assigned in the CMDB when the Planned Outage commences and ends.

- Click Save

Repeat Steps 9 to 12 to add more than one Item to the Outage. Click  to remove Item details from the Outage.

- Click Save and Done.

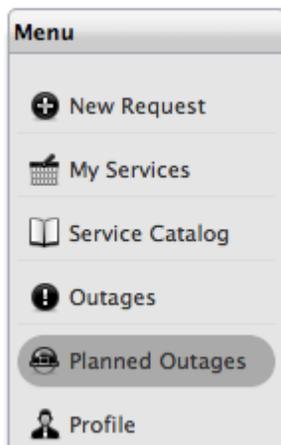
The Outage details are visible in the Planned Outage page, if the Criticality of the Item is equal to or greater than the Minimum Criticality set by the Administrator within the Setup>Privileges>System tab.

Viewing Outages

Planned Outages can be viewed from the Login Page and the Customer Portal, if the Administrator has toggled the Setup>Privileges>System Outages Page option to Yes. This enables the Planned and Unplanned Outage links in the Customer Portal and Login Page.

Customer Portal View

In the Customer Portal the Planned Outages information is accessible in the side bar menu of the Items and Services tab.



Planned Outages				
No.	Start Date	End Date	Items	Reason
2	01/08/16 02:05	01/09/16 00:00	1000010 (Iphone 6)	Maintenance

[Click to view details](#) 1 - 1 of 1 Results

To view the Outage details, click the Outage No. link. To close the window, click Done.

Outage Details

No. 2 Reason Maintenance

Start Date 01/08/16 02:05

End Date 01/09/16 00:00

Items

Item Number	Type	Category
1000010	Iphone 6	BYOD Devices

[Done](#)

Login Page View

Planned Outage information can also be accessed from the Login page, Click the View Outages link to display a complete list of current outages. Select the View Planned Outages link to access planned downtime details.



2

OUTAGES



FORUMS

0

Planned Outages				
No.	Start Date	End Date	Items	Reason
2	01/08/16 02:05	01/09/16 00:00	1000010 (Iphone 6)	Maintenance

[Click to view details](#)

1 - 1 of 1 Results

Planned Outage Page Options

- ◆ Search for Outages based on the Item Type
 - This functionality is enabled by the Administrator in Setup>Privileges>System Search Outages.
- ◆ Within the Outage Details window, click on the Item Number link to show the Item Relationship Map
 - To enable this feature, the Show Affected Relationships option must be activated by the Administrator in Setup>Privileges>System Outages.
- ◆ To return to the Planned Outage list, click the Done.

Troubleshooting

In Setup > Privileges > System, ensure that:

- ◆ Planned Outages page is Yes
- ◆ Outages page is Yes
- ◆ Minimum criticality is mentioned

In Configuration > Categories and Item Category, ensure that in the Item Life cycle:

- ◆ Life cycle state is in Transitional State of life cycle (Not an entry or exit state)
- ◆ Life cycle states has customer visible option set
- ◆ Criticality is set to a value mentioned above or equal to configured value in Setup > Privileges > System

For Customer Viewable Outages (Not Public), ensure that:

- ◆ The customer is entitled to view details of the item. (For example, part of the Org unit that the item belongs or the item is owned by her).

2.6.12 AMIE Snapshots

(The AMIE submenu option is only visible when two or more asset management tools are configured to be synched within AMIE as defined in Admin>Setup> AMIE>Setup tab.)

The AMIE Snapshot submenu is also known as the staging area for building a federated CMDB, which is a CMDB that uses information sourced from multiple asset management repositories.

When the application is synchronized with multiple asset management tools and the automatic Item creation option is disabled in Admin>Setup>AMIE Import, the system creates an image or Snapshot of the asset information which is made available within the AMIE Snapshot tab. As different asset management tools may not record the same information for an Item, the Supervisor can combine the most relevant information from the different sources into the one Item within the CMDB, by merging snapshots created by the different tools using the Category Map configured for the Item Category.

AMIE Snapshots											
Create		Merge		Hide		Search			Filter: Unassigned Hardware [sys] Display: 10		
Id	Server	Source	Item Type	User Owner	Manufacturer	Updated	Item Number	Platform String	MAC Address	Network Address	Network Name
<input type="checkbox"/>	30	ZENworks Configuration Management	ZENworks	DM051	Dell	05/25/11 21:48		Windows XP Professional	001372B0932B	10.0.1.173	kalaesh-pc
<input type="checkbox"/>	29	ZENworks Configuration Management	ZENworks	VMware Virtual Platform	VMware, Inc.	05/25/11 21:48		Windows Server 2003 R2	000C29EF70F3	10.0.1.166	zen-server
<input type="checkbox"/>	4	Spiceworks	Spiceworks	VMware Virtual Platform	Darren Williams	VMware	05/25/11 21:31		00:0C:29:D5:3D:58	192.168.133.133	lifetime-ns0vfu
<input type="checkbox"/>	3	Spiceworks	Spiceworks	Unknown Hardware	VMware	05/25/11 21:31			00:50:56:EF:8B:E8	192.168.133.2	192.168.133.2

Item creation in the CMDB

When Item information is recorded in multiple AMIE Snapshots, the Supervisor can merge images into one Item within the CMDB by first conducting a search on key fields such as MAC Address or Network Name for Hardware, or Version Number and Parent Id for Software Items. To maintain relationship data between the Hardware and Software Items (i.e., Parent/Child relationships), the order of Item creation is important. Always create parents first, then children, or in other words, Hardware first then the Software.

After identifying and selecting the relevant Snapshots, by ticking the fields next to the Id#, click the Merge button to display a synthesized Snapshot Detail screen. The information displayed on the Snapshot Detail, and recorded against the Item, is based on the Category Map configured for the Item Category.

If the Control CMS via RFC is enabled in Admin>Setup>Privileges>System, merged or promoted Snapshots are not automatically created as Items in the CMDB, but generate a Change Request that will require approval before the Item is saved in the CMDB. If the option is disabled, when the Save button is selected, the Item is automatically created in the CMDB.

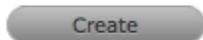
All AMIE Snapshots applied to an Item are removed from the AMIE Snapshot List View, when the list filter is set to display Unassigned Snapshots.

Merging Snapshots



Use the Merge button when multiple Snapshots of an Item are to be stored against a single Item record in the CMDB. Select the related Snapshots by checking the relevant boxes next to the Id Number, and click the Merge button.

Creating Items from Snapshots



Use the Create button to convert a single Snapshot into an Item record in the CMDB. If the Item already exists in the CMDB, the pre-existing details will be updated. If it is a new Item, a new Item record will be created. To promote a single Snapshot into an Item in the CMDB, check the box next to the Id Number, and click the Promote button.

Searching AMIE Snapshots



The search button within the Configuration>AMIE Snapshot screen allows the User to find related AMIE Snapshots using any Item attribute, including the fields created within Item Category templates.

Search Parameter Options

Global Options

Snapshot Status

All : searches assigned and unassigned AMIE Snapshots.

Unassigned : searches AMIE Snapshots that are not assigned to an Item.

Assigned : searches AMIE Snapshots that have been assigned to an Item, and therefore not displayed in the List View.

Hidden : searches through deleted AMIE Snapshots that have never been applied to an Item.

Server

Select a single server option to refine the search, or leave blank to search through all systems configured in AMIE.

Manufacturer

Enter Manufacturer details of the Item. This field supports partial text search.

Owner Options

Username

Often the last logged in User for the Item. This field supports partial text search.

Org Unit

The Org. Unit owner for the Item. This field supports partial text search.

Type Options

Item Category

Select a Category from the popup list to restrict AMIE Snapshots by the Item Category. A selection will display the custom fields for the chosen Category, which can be completed to refine the search.

Item Type

The Item Type of the Item. This field supports partial text search.

Parent Options

AMIE Snapshot Id

Search on a parent AMIE Snapshot Id. This information is useful when merging children Items, such as Software.

Deleting Snapshots



To ensure that a Snapshot is ignored in future AMIE imports, click the Delete button after checking the field next to the relevant Snapshot Id Number.

Enabling deleted Snapshots

Enable

If a search is conducted on deleted or hidden Snapshots, an Enable button becomes available and allows the User to re-enable a hidden Snapshot.

2.7 Service

- ◆ [Section 2.7.1, “Service Level Management,” on page 613](#)
- ◆ [Section 2.7.2, “Service Level Management Configuration,” on page 615](#)
- ◆ [Section 2.7.3, “Service,” on page 618](#)
- ◆ [Section 2.7.4, “Contracts,” on page 677](#)

2.7.1 Service Level Management

The goal of Service Level Management is to maintain and improve the alignment between business activities and IT service quality. This is achieved through the cycle of:

1. *Agree* on service level expectations and record them in Service Level Agreements (SLAs)
2. *Monitor* the service provided
3. *Report* actual service delivery results
4. *Review* IT service delivery results in relation to the SLA, and adjust accordingly.

A Service Level Agreement (SLA) is a formal, negotiated contract that outlines service level expectations and clarifies responsibilities between the Service Desk and its Customers. When unacceptable levels of service are noted throughout the service cycle, action can be taken to re-align expectations with actual service delivery results.

Within the system, SLAs are specific and time-based in order to help monitor and report on performance. They can be applied to any of the following elements within the application:

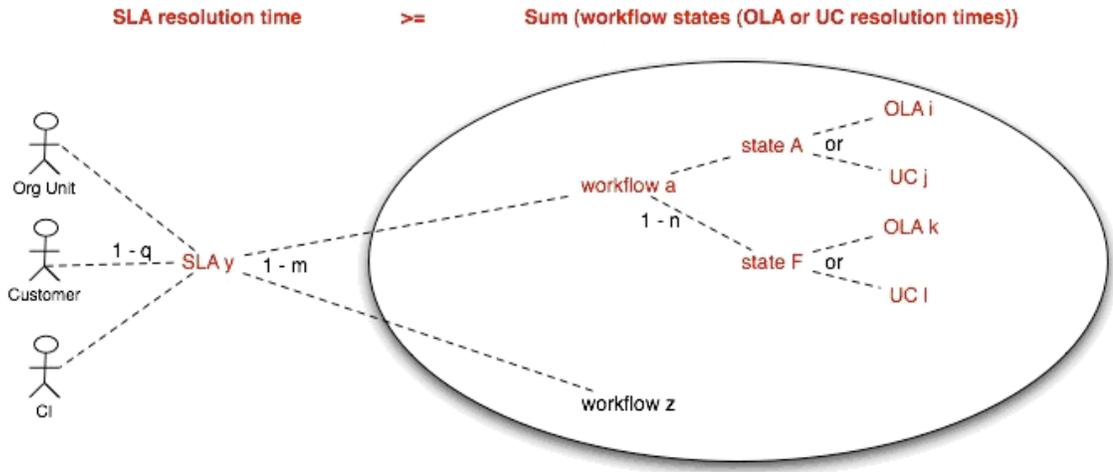
- ◆ Customers
- ◆ Organizational Units
- ◆ Items.

NOTE: Only Users assigned with the Service Level Management Role can create or modify SLAs.

SLAs are incorporated in the support process when a new Workflow is created. An SLA is assigned to a Workflow and specifies the expected resolution time for a request. To successfully meet SLA expectations, the system allows the Service Desk to associate each Workflow State of a request with an Operational Level Agreement (OLA) or Underpinning Contract (UC).

An OLA is an internally negotiated document that identifies the service level expectations between the Service Desk and the Technical Support Teams. An Underpinning Contract enables the Service Desk to monitor and maintain control of requests that are forwarded to external service and support providers.

To ensure an SLA resolution time is met, the sum of the resolution times for each of the OLAs or Underpinning Contracts assigned to a Workflow Lifecycle must be less than or equal to the SLA resolution time.



ITIL Processes - Incident, Problem or Change Management

SLAs in Action

When a request is logged with the Service Desk, the request adopts the SLA that has been assigned to either the Item, Customer or Organizational Unit. If an SLA has not been allocated to any of these elements, the SLA assigned as the system default within the Admin>Setup>Privileges>Requests tab will be automatically applied to the request.

The SLA allocated to the request determines the Workflow options made available for the lifecycle of the request. The Workflows listed are assigned the same SLA as the request. Before saving the request, the User can adjust the system assigned Workflow if more than one option exists.

Refer to [SLM Configuration](#) for more detailed information.

Service Tab

Use this section to create and modify SLAs to provide request lifecycle management capabilities. This section can also be used to create and customize OLAs and UCs. After the individual components of the SLAs have been configured, Workflows can be created and assigned the service level management functionality.

The system also provides SLA-compliance reporting, allowing Managers to define and track availability and performance objectives that reflect business goals. SLAs are used across all processes, and are assigned when requests are created.

Within the Service Tab Users can:

- ◆ [Create SLAs](#)
- ◆ [Create OLAs](#)
- ◆ [Create Underpinning Contracts](#)
- ◆ [Define Workflows](#)
- ◆ [Define Breach Codes](#)
- ◆ [Maintain Contracts](#) (when enabled).

2.7.2 Service Level Management Configuration

- ◆ [“Introduction” on page 615](#)
- ◆ [“OLAs & UCs” on page 615](#)
- ◆ [“Workflows and Workflow States” on page 615](#)
- ◆ [“Escalation” on page 615](#)
- ◆ [“SLAs and Workflow” on page 616](#)
- ◆ [“Configuring SLM in the system” on page 616](#)
- ◆ [“Applying SLM to request creation and management” on page 617](#)

Introduction

A Service Level Agreement (SLA) is a business contract that specifies service level expectations around critical infrastructure and business services. Typically, they refer to response, restoration and resolution targets that the Service Desk needs to meet.

OLAs & UCs

Operational level agreements (OLAs) are similar to SLAs, except they communicate internal team-based expectations within specific stages of the Workflow process. Similarly, the obligations of external service providers are specified using Underpinning Contracts (UCs). Unlike an OLA where an appropriate Team Technician is assigned responsibility for servicing a request, it is the responsibility of a Service Level Manager to monitor the performance of the external service provider in relation to the business's expectations as defined in UC Workflow States.

Workflows and Workflow States

Workflows consist of an Entry State, one or more Transitional States and Exit States. They define the sequence of steps that Service Desk staff can follow when managing customer requests. Within the system, any number of Workflows can be customized for the Incident, Problem, Change, Release and Service Request Management Processes. Each step, or Workflow State, defines the activity, and if relevant the OLA, with Default Team, or UC required to successfully process the request at that step. Only after the nominated Team Technician has successfully concluded the activity does the request get routed to the next appropriate Workflow State. The Workflow is deemed complete once the request enters an Exit Workflow State.

Escalation

When a request is created it is assigned an SLA, and based on the assigned SLA, a Workflow and Team. Based on the configuration of the assigned Team, a Technician or System User is allocated the responsibility of the task. Within Teams, escalation layers are configured for manual or automated routing of requests. Manual routing through the escalation layers is triggered by a Technician in the request Information screen. Automatic routing through escalation layers is driven by the request's assigned priority relative to the associated SLA response, restoration and resolution targets. For each target one or more percentage triggers can be created for automated reminders, warnings or escalations. When the request is in a Service Level active stage of the Workflow the system monitors the percentage of time elapsed relative the SLA triggers, and when percentage targets are met the triggers are activated. If the SLA response, restoration or resolution time is breached, the request is automatically escalated.

SLAs and Workflow

The Service Level Management module allows service level expectations to be mapped to end-to-end business processes. In so doing, the system performs the following Service Level Management validation:

SLA resolution time \geq Sum (Workflow States (OLA or UC resolution times))

When validating Workflows, the system disallows adding States to a Workflow that will force the sum of the Workflow State resolution timers for OLAs and UCs to breach the SLAs resolution timers. In such situations, the system will warn the service level manager to either increase the SLA resolution targets or select a more appropriate UC or OLA that will fall within the SLA targets.

Configuring SLM in the system

Before requests can be processed using SLM, a Supervisor typically needs to perform the following sequence of configuration steps:

1. Define Technicians. Set Roles & Process permissions ([Users > Users](#))
2. Define service level managers ([Users > Users](#))
 - To become a service level manager a User must be assigned the Service Level Management Process
3. Establish business [SLAs](#)
 - a. Specify service level manager
 - b. Availability %
 - c. Warning and breach notifications
 - d. Set priority targets
 - e. Specify blackout periods
 1. Setup [OLAs](#)
 - a. Specify service level manager
 - b. Set service targets
 1. Setup [Underpinning Contracts](#) (UCs)
 - a. Specify service level manager
 - b. Specify Vendor
 - c. Set service targets
 1. Define [Workflows](#)
 - a. Name the process
 - b. Optionally modify default open and close states { you might need to come back to this once all states have been defined}
 - c. Specify SLA for the Workflow from Step 3.
 - d. For each Workflow State, specify:
 - i. Is the Workflow State active?

- ii. Is the State an entry or exit state?
- iii. The Contract Type: None / OLA / UC
 - 1. Specify an OLA if the OLA Contract Type is set.
 - 2. Select a default Team, that has been assigned the OLA.
 - 3. Specify a UC, if the UC contract type has been selected.
- iv. Should the SLA timer continue counting time when the request has entered this State?
- v. Should the State be used to measure SLA restoration or resolution time (for reporting purposes only)
- vi. Specify relevant next / previous States to define the end-to-end Workflow.

To prevent the SLA target from being breached, the contract time will be calculated when an OLA or UC is assigned to a State.

- e. Update 6b, if required.

Define the [Teams](#)

- a. Specify Technicians
- b. Specify OLAs
- c. Specify Workflows
- d. Define escalation layers or work groups

Make any modifications to the Workflow State

- a. Specify a default Team to provide support for specific States {review 6diii 1a)

Applying SLM to request creation and management

After SLAs, Workflows and Teams have been defined, the Service Desk is able to use the system to efficiently process Incident, Problem, RFC and Service Requests according to organizational standards and procedures.

The following steps outline the process of generating and managing an Incident in the system:

- 1. Within the Operations > Incident tab select the New button:
 - a. Assign a Customer
 - b. Select an Item, which include Services within Service Catalog
 - c. Profile the request
 - i. Select a Classification
 - ii. Enter Description of the request
 - iii. Complete any custom fields
 - d. If the proactive analysis option is enabled, proposed solutions will be available within the Analysis Tab. If a relevant Solution is proposed, apply the Solution to close the request. Otherwise, click 'Next' to move to the Summary tab of the request screen.
 - 1. In the Summary Information screen, confirm:

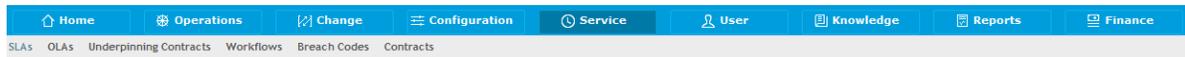
- a. SLA
- b. Workflow
 - i. A list of Workflows options is derived based on the SLA selected
 - ii. If a Workflow has not been assigned to the SLA, then the system default Workflow is assigned to the Incident
- c. Team
 - i. A list of Team options will be derived based on the Workflow selected
 - ii. If a Team has not been assigned to the Workflow, then the CI's default Team is assigned to manage the Incident
- d. Technician
- e. Request Urgency / Impact / Priority
- f. Notifications
- g. Workflow State (= Status)
- h. Add Note(s), and apply private/public visibility and Customer email distribution options
- i. Upload attachments
- j. Access Audit trail details
- k. Access Impact information (i.e., Service Targets, SLA breaches, Item Relationships, Planned Outages, Contract Monitor)
 - 1. Perform analysis within the Analysis tab
- a. Allows the system to recommend a proposed Workaround or Solution
- b. Search Workarounds / Solutions
- c. Raise new Workaround / Solution
- d. Raise a new Problem and link it to the request
- e. Raise a new RFC and link it to the request
- f. If the request is related to other Incidents, Problems, Change or Service Requests, view all related requests within the Related sidebar in the Summary screen.
 - 1. Save the request
 - 2. Group similar or related requests using the Link option and manage the collective from the Group tab or selecting the Group # link in the List View, if this option has been defined for the customized view.

2.7.3 Service

- ◆ [“Service Level Agreements \(SLAs\)” on page 619](#)
- ◆ [“Operational Level Agreements \(OLAs\)” on page 629](#)
- ◆ [“Underpinning Contracts” on page 634](#)
- ◆ [“Workflows” on page 638](#)

- ◆ “Breach Codes” on page 673
- ◆ “Assigning an SLA” on page 674

Service Level Agreements (SLAs)



Service Level Agreements (SLAs) are used by organizations to manage the levels of service expected of the IT and to ensure optimal maintenance of critical business systems and services. SLAs are documents that are negotiated between the Service Provider and Customer departments, to identify expectations and clarify responsibilities.

This tab is used to create and modify Service Level Agreements that provide request management capabilities.

SLAs include the following elements:

- ◆ Name
- ◆ Service Level Manager
- ◆ Priority Targets
- ◆ Automated Alert Notifications
- ◆ Pricing (if enabled in Admin>Setup>Billing)
- ◆ Blackout Periods
- ◆ Workflows.

Details

Creating a Service Level Agreement

To create a new Service Level Agreement:

1. Select Service >SLAs
2. Click New

The screen defaults to the Details tab of the SLA Editor screen.

3. Complete the fields, including any custom fields, as required:

SLA Editor

Details

Name*	The name to identify the SLA.
Review Date	Details are completed based on the Admin default settings but can be edited by the User. An Alert is sent based on the default days set in the Review SLA Alert field in Admin>Setup>Privileges>Requests.
On Breach	Notification can be set to Carbon Copy (CC) an email to the Team Leader when the Warning or Escalation alert is sent to the Technician assigned to the request. It should be noted that the Service Level Manager is also notified when an SLA is breached.
Pause on Holiday	<p>**This option is only displayed if the Observe Public Holidays option has been enabled within the Administrator>Setup>Privileges>User tab.</p> <p>Enable this option, if the SLA is to be adjusted on designated Public Holidays. The Public Holidays are defined within the Administrator>Setup>Public Holidays screen and associated with requests via the assigned Technician and their associated Country.</p>

SLA Editor

Customer Timezone	When enabled, SLA times displayed within the Technician request view uses the Customer timezone.
Timezone	This is visible when Customer Timezone is not set and all SLA dates are calculated based on the Timezone set within this field. This is especially applicable for User Work Hours, Blackouts, which also impacts the SLA Reports.
Requirements	
Availability*	Used to state the time an Item under the SLA is required to be online. The default value is set to 97%.
Interval Measured in	Defines the number of days over which the Availability requirement is calculated.
Priority	
Process Name	<p>The field is displayed when Workflows have been assigned to the SLA.</p> <p>If multiple Workflows have been assigned for each Process, this field allows the User to assign a default Workflow for the SLA. When a request is created using the SLA, the default Workflow is assigned to the request.</p>
SLM (Service Level Manager)	
Name	Use the Find Service Level Manager search option, to enter the contact details of the Manager who will monitor the performance of the SLA.
Email	<p>This is also the User who is assigned responsibility for managing the performance of external support providers when a request moves into a Workflow State that is supported by an Underpinning Contract</p> <p>.</p>
Internal Cost ^	
Annual Cost ^	<p>The SLA cost is calculated on the basis of what is costs the service organization to provide the service agreement, as applied on a yearly basis per User. The figure is associated with Items and used to calculate the cost of supplying a Service. This figure can be used as the basis for setting the Annual Price.</p> <p>The figure entered should be on a Annual Cost per User basis.</p>
Request Cost ^	Indicates the cost applied on a Per Request basis. This figure can be used as a reference for setting the Incident Price.

SLA Editor

Hourly Cost ^	Indicates the cost applied on an Hourly basis. This figure can be used as a reference for setting the Hourly Price.
Customer Pricing ^	
Annual Price ^	This is the charge applied to the SLA on a yearly basis and paid by the customer consuming the Service associated with the SLA. (It should be greater than the SLA Cost, as it would include the cost of servicing the SLA plus a profit margin, if relevant.) The figure is associated with Items and used to calculate the price paid by the customer for consuming a Service. The figure entered should be on a Annual Price per User basis.
Request Price ^	Indicates the price paid by the customer when the SLA is applied on a Per Request basis.
Hourly Price ^	Indicates the price paid by the customer when the SLA is applied on an Hourly basis.

* Denotes a mandatory field

^ Only applicable when SLA Prices are enabled in Setup>Billing

Targets

The Targets tab is used to configure the SLA's priority Response, Restoration and Resolution Times.

To modify a Priority:

1. Select Service > SLAs
2. Select an SLA
3. Select the Targets tab to display the following fields:

SLA Editor

Targets	
Targets	<i>Common:</i> Select Common if the SLA is to apply across Incidents, Requests, Problems and Change Management. <i>Per Process:</i> If the SLA is specific to a Process, select Per Process and choose a Process displayed in the drop-down list.
Interval	Define if the time is to be calculated in Hours or Minutes.
Service Time	
Priority	Urgent, High, Medium and Low.
Milestones	

SLA Editor

Initial Response	The maximum time the Customer would wait from the point of request creation before receiving a Note update for a Technician. The Response trigger is stopped when a Note has been added to the request by the assigned Technician and an email is sent to the Customer. If the Response Time is reached, without a Note being added, the request will be escalated.
Restoration Time	The maximum time the Customer would wait from the time the request was created until a workaround or temporary fix has been implemented. The Restoration trigger stops by assigning the request a Workflow State that has to the SLA Restoration option set to Yes. By default, this Workflow State is Open - Restored.
Resolution Time	The taken time from the point of request creation until it the request is moved to a Workflow State with the SLA Resolution option set to Yes. Any of the default Workflow Exit States stop the Resolution Timer.
Notify Override	If the system is to override the default notification method set for a request when the Priority being edited is assigned to a request, check this option.
Notification Type	Set Email or SMS as the type of notification when the override action is applied to a Priority.
Alerts	
Reminder	Sends a reminder email to the Technician when the defined percentage of time elapses for a Response, Restoration or Resolution target that has not been met on a request. Can be set up to 200% of the SLA. Note, Alert intervals are not cumulative.
Warning	Sends a warning email to the Technician when the defined percentage of time elapses for a Response, Restoration or Resolution target that has not been met on a request. Can be set up to 200% of the SLA.
Escalation	Escalates the request to a higher escalation layer when the defined percentage of time elapses for a Response, Restoration or Resolution target that has not been met on a request. Can be set up to 200% of the SLA. It should be noted that the Service Level Manager is also notified when an SLA is breached.
Support	
24 x 7	Do not amend if the SLA is to apply 24 hours a day, 7 days a week.

SLA Editor

Normal Support

Select if service hours are to be defined for the SLA. When checked, define the service hours by either selecting a template (Templates are configured by the Administrator in the Setup>Localization>Hours tab) or manually define the days and time by making selections within the drop-down lists.

4. Click Edit, if not already in Edit mode

Priority	Response Time	Restoration Time	Resolution Time	24 x 7 support	Alert
Urgent	6 Hours	12 Hours	24 Hours	Yes	None
High	12 Hours	24 Hours	48 Hours	Yes	None
Medium	18 Hours	36 Hours	72 Hours	Yes	None
Low	24 Hours	48 Hours	96 Hours	Yes	None

5. Define if the SLA applies across all Processes or to a specific Process
6. Define if the SLA is to be calculated in minutes or hours
7. Select the Priority link to customize Milestones, Alerts and Support hours

Initial Response: 12 Hours

Restoration Time: 24 Hours

Resolution Time: 48 Hours

Notify Override:

Notification Type: None

Alerts: Warning @ | %

Support: 24 x 7 Normal Support

8. Modify the Milestone intervals for the Response Time, Restoration Time and Resolution Time, as required

The time will be set in minutes or hours, as defined for the SLA.

Milestone intervals are not cumulative

For example, for the default Warranty SLA, the Priority of Urgent has the default Milestone times of 6, 12 and 24 hours. This means a User has 6 hours to send a response to a Customer before the Response time is breached, 12 hours from the point of request creation to meet the

Restoration time, and 24 hours from the point of request creation to meet the Resolution time. It should be noted that requests may be moved to non-SLA timed States during these Milestone periods, so the 12 or 24 hours may not be consecutive hours.

9. Check the Notify Override option, if relevant

Set the type of notification, email or SMS, that is to be used to contact the User assigned to the request with this Priority.

10. Create one or multiple Reminder, Warning or Escalation Alerts, if relevant

Enter the percentage of time to elapse for an Alert to be triggered for a Milestone. Selecting Warning as the Alert will cause a warning e-mail to be sent to the request's Technician when the specified percentage of a milestone has been reached.

Selecting Escalation will trigger a request escalation to the next support layer of the Team. The escalation system will also fire if the SLA threshold is breached.

NOTE: It is recommended that reminders be sent at 50% of elapsed time and escalations at 75-80%

These figures are advisory only. The internal processes of your organization will dictate the appropriate values. The Reminder percentage must be less than the Warning or Escalation percentages.

Alerts can be set to 200% of the SLA time, which ensures notifications can be still be received against breached requests

If Alerts are not customized, the application will automatically escalate the request when the Priority milestone is breached

11. Click Save
12. Modify other Priorities as necessary.

Configuring Support Hours

After the Priority times and Alerts of an SLA have been configured, Support Hours can be defined. These can be set to 24 hours by 7 days a week (24 X 7), or manually adjusted to reflect the support operation open hours.

Under 24 X 7 mode, if the SLA's urgent Initial Response field is set to six hours, and an urgent request that uses the SLA is created at midnight in the assigned Technician's time zone, those six hours will expire by 6:00 AM. This is the option to use if a support operation is staffed 24 hours a day.

If a support operation is not open 24 hours a day, the request timers are not required to run when Technicians are not available. For instance, if the support hours are 9:00 AM to 5:00 PM and the SLA hours reflect this, the SLA timers of the urgent request created at midnight would not start ticking until 9:00 AM the following business day and would expire at 3:00 PM.

To define the SLA support hours:

1. Select Service > SLAs
2. Select an SLA
3. Click the Priority link
This will display the Details tab with Support Hours options of 24x7 and Normal
4. The default setting is 24 X 7, to amend the support hours select the Normal Support option

The screenshot shows the 'SLA Editor' interface with the 'Weekdays' configuration panel open. The 'Apply Template' dropdown is open, showing options like 'Weekdays 8 to 5' and 'Weekdays 9 to 5'. The 'Support' section is set to 'Normal Support' with 'Hours' selected. The 'Weekdays' section shows a grid for each day of the week with time range selectors.

5. Select a template from the Apply Template drop-down options or customize Weekdays manually. Note that the SLA timers become inactive when the support desk is closed.
6. Click Save.

Blackouts

Blackouts are used as part of Change and Configuration Management to advise Users about the appropriate periods of time that an Item associated with an SLA should be scheduled to be taken off-line if an Outage is needed. Within the system, when an Outage is being scheduled (Item>Details>Outages) the Blackout period is displayed, informing the User of the best time to schedule a Planned Outage.

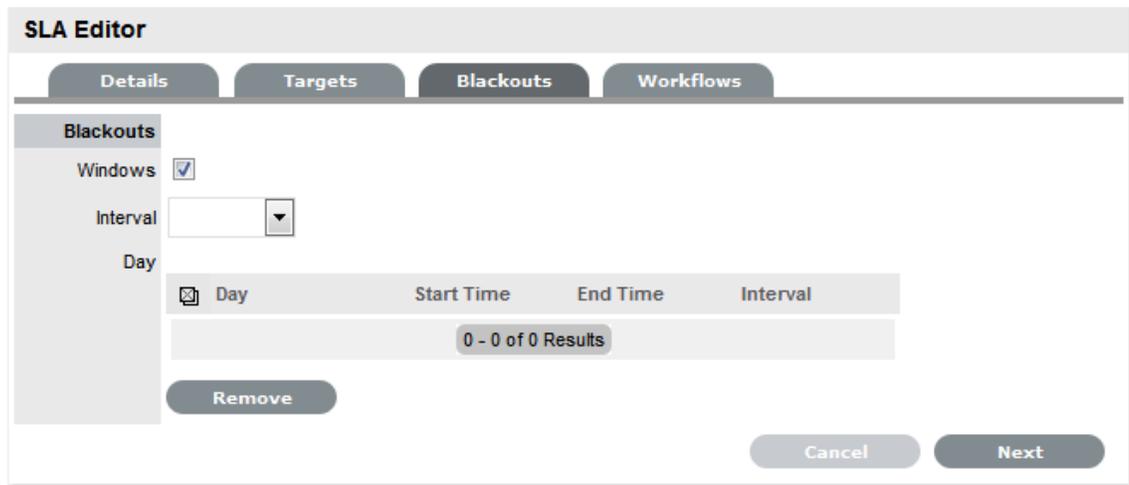
A Blackout Period is based on an agreement between the Customer and the Service Desk regarding set times that the Customer has no service expectations. This can also be the preferred time for Item upgrades and maintenance as they will not affect service availability.

A Blackout Period is specified within an SLA. During this time the SLA is viewed as inactive and its measuring time is stopped. OLAs that underpin a Workflow State that apply an SLA with a Blackout Period, also adopt the Blackout Period.

Specifying an SLA Blackout

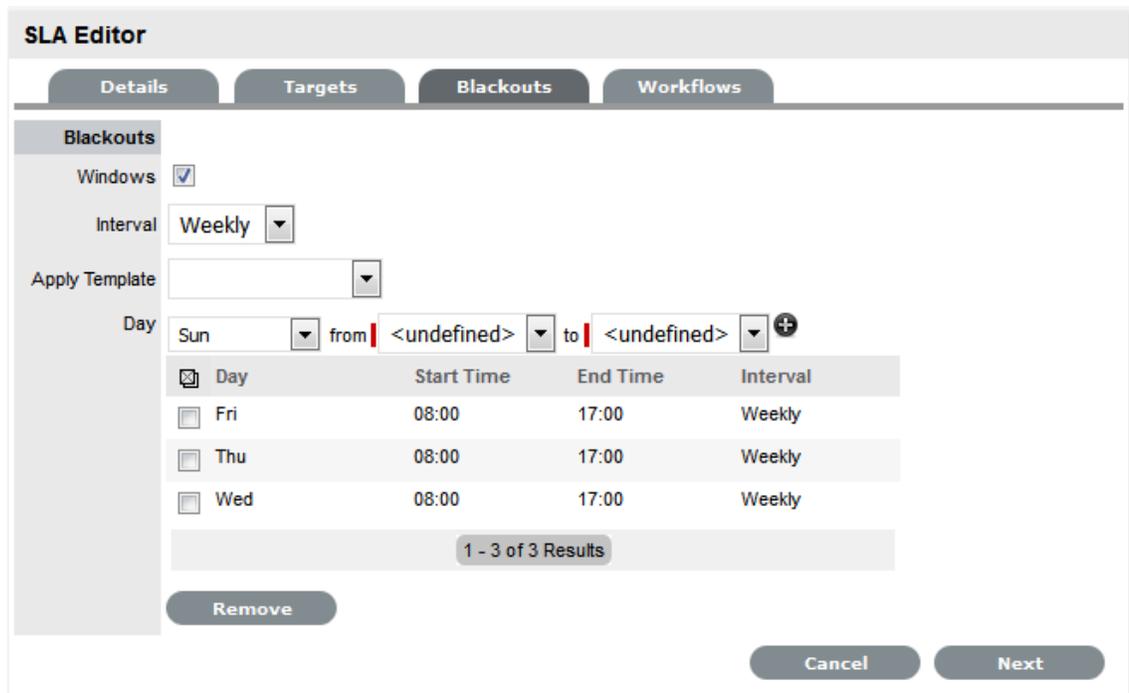
To specify an SLA Blackout:

1. Select Service >SLAs
2. Click an SLA hyperlink
3. Click Edit
4. Move to the Blackouts tab
5. Tick the Windows option



6. Set the Interval of weekly or monthly
7. Apply a Template or define the day and time period for the approved Blackout manually, then click **+**
8. Define the preferred Timezone

This is required information to save the Blackout information.



9. Click Save.

To remove time-frames from the Blackout Period:

1. Select Service >SLAs
2. Click an SLA hyperlink
3. Click Edit

4. Move to the Blackouts tab
5. Check the box next to the Day to be deleted from the Blackout

<input type="checkbox"/> Day	Start Time	End Time	Interval
<input type="checkbox"/> Fri	08:00	17:00	Weekly
<input checked="" type="checkbox"/> Thu	08:00	17:00	Weekly
<input checked="" type="checkbox"/> Wed	08:00	17:00	Weekly

1 - 3 of 3 Results

Remove

6. Click Remove.

Workflows

Workflows are associated with an SLA through the Workflows tab of the SLA Editor screen or within the Workflow itself. All SLAs assigned to the SLA are listed within this tab and Workflows can be added or removed within this tab, as required.

Assigning a Workflow

To assign a Workflow:

1. Select Service>SLAs
2. Click the relevant SLA link
3. Move to the Workflows tab
4. Click Edit
5. Select Add

The Available Workflow drop-down list will be displayed.

The screenshot shows the 'SLA Editor' interface with the 'Workflows' tab selected. An 'Available Workflows' dropdown menu is open, listing several workflow options. The 'Standard Change Workflow' is highlighted. Below the dropdown, a table shows the selected workflow's details.

Name	Description
Standard Change Workflow	Configurable Standard Change Management workflow

1 of 1 Results

6. Select a Workflow
7. Click Save.

To remove a Workflow assignment, use the checkbox next to the relevant Workflow and click the Remove button.

Default Warranty SLA

The system includes a default SLA that does not include costs, called Warranty. The Warranty SLA can be used or edited as required.

Integration with Request Creation and the Billing System

The prices specified in the SLA provide the basis for fees charged for support on both a Per Request basis and on a subscription basis. The hourly rate is included for reporting purposes. Rather than an Item using an SLA, Items can be covered by maintenance contracts. A contract can cover a particular request, or exist as a subscription.

Maintenance Contracts form part of the request creation process. Requests can be entered into the system without a valid contract, but are flagged as unpaid, and are unable to be worked on until the invoice is processed. There is also a control (configured in the Billing Preferences) for the length of time an unpaid request can exist in the system.

Assigning a Default Workflow to an SLA

If more than one process Workflow is assigned to an SLA, it is required to select a default Workflow. This default Workflow will be the Workflow assigned to a request when the SLA assigned supports more than one Workflow.

To assign a Default Workflow:

1. Select an SLA from the Service > SLA tab
2. Click Edit

Note that the system automatically assigns a default Workflow to an SLA, as Workflows are being assigned.

3. Within the Priority Field, use the drop-down lists to update the relevant Incident, Problem, Change and Service Request default Workflows

Priority	
Request	Service Request Workflow
Change	Standard Change Workflow
SLM	Emergency Change Workflow
	Standard Change Workflow

4. Click Save to apply the change.

Operational Level Agreements (OLAs)

An OLA is an internally negotiated agreement that identifies the service level expectations between the Service Desk and the Technical Support Teams. OLAs are applied to Workflow States and allow the Service Desk to successfully meet service level expectations. This is achieved by associating an SLA to a Workflow and then assigning, where relevant, OLAs or [Underpinning Contracts](#) to separate stages of that Workflow. It should be noted that SLA targets for Response, Restoration and Resolution time must be greater than or equal to the combined OLA and UPC times for each of these targets, to ensure that service level breaches do not occur.

Workflow - Incident Workflow

Workflow Lifecycle Status

Status

Name | Open - Restored

Active State Yes No

Entry Point

Exit Point

Has Notes

Service

SLA Active Yes No

SLA Restoration Yes No

SLA Resolution Yes No

Contract Type None OLA Underpinning Contract

OLA

OLAs Available OLAs Selected OLAs
No OLAs available None selected

Default Contract |

Details Tab

Creating an OLA

To create a new OLA:

1. Select Service >OLAs
2. Click New

OLA Editor

Details Targets States Teams

Details

Name | New OLA

Customer Timezone

Timezone | (GMT +5:30) New Delhi

SLM

Name

Email

Find Service Level Manager

First Name Email

Last Name Phone

Cancel Next

3. Enter a Name for the OLA

OLA Editor

Details

Name* The name to identify the OLA.

OLA Editor

Review Date	Details are completed based on the Admin default settings but can be edited by the User. An Alert is sent based on the default days set in the Review SLA Alert field in Admin>Setup>Privileges>Requests.
Pause on SLA Holiday	<p>**This option is only displayed if the 'Public Holidays' option has been enabled within the Administrator>Setup>Privileges>Technician tab.</p> <p>Enable this option, if the OLA is to be adjusted on designated Public Holidays, when an associated SLA has the Pause on Holiday option enabled. The Public Holidays are defined within the Administrator>Setup>Public Holidays screen and associated with requests via the assigned Technician and their associated Country.</p>
Customer Timezone	When enabled, OLA times displayed within the Technician request view uses the Customer timezone.
Timezone	This is visible when Customer Timezone is not set and all SLA dates are calculated based on the Timezone set within this field. This is especially applicable for User Work Hours, Blackouts, which also impacts the SLA Reports.
SLM (Service Level Manager)	
Name	Use the Find Service Level Manager search option, to enter the contact details of the Manager who will monitor the performance of the OLA.
Email	

4. Adjust the Review Date, if necessary
(A reminder Alert will be sent to the SLM, based on the default days set in Admin>Setup>Privileges>Request.)
5. Tick the Customer Timezone option, if relevant
Apply this option if the User is to view OLA due dates using the Customer Timezone or complete the Timezone option.
6. Search and select a Service Level Manager.
A Service Level Manager (SLM) is a User that has been assigned with the Service Level Management Process.
7. Move to the Targets tab
8. Complete the following information:

SLA Editor

Targets

Targets

Common: Select Common if the OLA is to apply across Incidents, Requests, Problems and Change Management.

Per Process: If the OLA is specific to a Process, select Per Process and choose a Process displayed in the drop-down list.

Interval

Define if the time is to be calculated in Hours or Minutes.

Service Time

Priority

Urgent, High, Medium and Low

Milestones

Initial Response

The maximum time the Customer would wait from the point of request creation before receiving a Note update for a Technician. The Response trigger is stopped when a Note has been added to the request by the assigned Technician and an email is sent to the Customer. If the Response Time is reached, without a Note being added, the request will be escalated.

Restoration Time

The maximum time the Customer would wait from the time the request was created until a workaround or temporary fix has been implemented. The Restoration trigger stops by assigning the request a Workflow State that has to the OLA Restoration option set to Yes. By default, this Workflow State is Open - Restored.

Resolution Time

The taken time from the point of request creation until it the request is moved to a Workflow State with the OLA Resolution option set to Yes. Any of the default Workflow Exit States stop the Resolution Timer.

Notify Override

If the system is to override the default notification method set for a request when the Priority being edited is assigned to a request, check this option.

Notification Type

Set Email or SMS as the type of notification when the override action is applied to a Priority.

Alerts

Reminder

Sends a reminder email to the Technician when the defined percentage of time elapses for a Response, Restoration or Resolution target that has not been met on a request. Can be set up to 200% of the OLA. Note, Alert intervals are not cumulative.

SLA Editor

Warning	Sends a warning email to the Technician when the defined percentage of time elapses for a Response, Restoration or Resolution target that has not been met on a request. Can be set up to 200% of the OLA.
Escalation	Escalates the request to a higher escalation layer when the defined percentage of time elapses for a Response, Restoration or Resolution target that has not been met on a request. Can be set up to 200% of the OLA. It should be noted that the Service Level Manager is also notified when an OLA is breached.
Support	
24 x 7	Do not amend if the OLA is to apply 24 hours a day, 7 days a week.
Normal Support	Select if service hours are to be defined for the OLA. When checked, define the service hours by either selecting a template (Templates are configured by the Administrator in the Setup>Localization>Hours tab) or manually define the days and time by making selections within the drop-down lists.

9. Add one or multiple Warning Alerts, if required

NOTE: Trigger intervals are not cumulative

In the default OLA for Warranty, the Urgent default times of 6, 12 and 24, mean 6 hours for the Response stage, 12 hours for Restoration from initial creation, and 24 hours to reach the Resolution from initial creation.

1. Define the support hours

Within 24 X 7, if the OLA's urgent Initial Response field is set to six hours, and an urgent request that uses the OLA is created at midnight in the assigned Technician's time zone, those six hours will expire by 6:00 AM. This is the option to use if your support is staffed 24 hours a day.

Normal support ensure request timers do not run when Technicians are not available. For instance, if the support hours are 9:00 AM to 5:00 PM and the SLAs are as such, the urgent requests' timer would not start ticking until 9:00 AM the following business day and would expire at 3:00 PM.

2. Click Save

3. Click Done.

Now associate the OLA with a Team within the Service tab of the Team Information screen.

The OLA will also be available within the OLA options displayed when OLA is selected as a Contract Type option within the Workflow Status editor screen.

States Tab

The OLA States tab lists the Workflow stages that are assigned to the OLA.

Teams Tab

The Teams tab displays the Team Names and Processes that are assigned to the OLA.

Assigning an OLA to a Team

OLAs are assigned to Teams within the Service Tab of the Team Information screen, when Teams are created or edited. To view OLAs associated with Teams, sort the User>Team List View using the OLA column header. The Lead Technician and Process supported by the Team are also displayed.

OLAs and Blackout Periods

If a request is assigned an OLA State and the request's SLA is in a Blackout Period, the OLA will adopt the SLA Blackout Period. This means that the OLA timers will stop until the Blackout Period has elapsed.

Underpinning Contracts

Underpinning Contracts (UCs) are used to manage support services provided to the Service Desk by external service providers. These Contracts ensure the external parties maintain their service obligations to the Service Desk, which ensures the Service Desk meets the SLA expectations of its Customers.

To successfully meet SLA expectations, the system allows the Service Desk to associate each Workflow State of a request with an Operational Level Agreement (OLA) or Underpinning Contract. It should be noted that SLA targets for Response, Restoration and Resolution time must be greater than or equal to the combined OLA and UC times for each of these targets, to ensure that service level breaches do not occur.

Workflow - Incident Workflow

Workflow Lifecycle Status

Status

Name | Open

Active State Yes No

Entry Point

Exit Point

Has Notes

Service

SLA Active Yes No

SLA Restoration Yes No

SLA Resolution Yes No

Contract Type None OLA Underpinning Contract

Underpinning Contract

Underpinning Contracts

Available Underpinning Contracts

- New UPC1
- New UPC

Selected Underpinning Contracts

None selected

Default Contract |

Assign SLM Yes No

When a request moves into a State that is governed by an Underpinning Contract, for internal contract monitoring, the request can be assigned to a Service Level Manager. This allows the Manager to maintain control of the request and to easily follow up with the external service provider, if required.

Details Tab

Creating an Underpinning Contract:

To create an Underpinning Contract for use within a Workflow State:

1. Select Service>Underpinning Contracts
2. Click New

3. Enter the Contract Name

UPC Editor

Details

Name*	The name to identify the UC.
Vendor	The name of the service provider supporting the contract. Select from the list or create a new Vendor.
Review Date	Details are completed based on the Admin default settings but can be edited by the User. An Alert is sent based on the default days set in the Review SLA Alert field in Admin>Setup>Privileges>Requests.
Customer Timezone	When enabled, UPC times displayed within the Technician request view using the Customer timezone.
Timezone	This is visible when Customer Timezone is not set and all UPC dates are calculated based on the Timezone set within this field. This is especially applicable for User Work Hours, Blackouts, which also impacts the UPC Reports.

UPC Editor

SLM (Service Level Manager)

Name Use the Find Service Level Manager search option, to enter the contact details of the Manager who will monitor the service provider's ability to meet their contractual obligations .

Email

4. Select a Vendor from the drop-down list or click  to enter new vendor details
5. Adjust the Review Date, if necessary
(A reminder Alert will be sent to the SLM based on the default days set in Admin>Setup>Privileges>Requests.)
6. Tick the Customer Timezone option, if relevant
Apply this option if the User is to view UC due dates using the Customer Timezone or define the UC Timezone.
7. Search and Select a Service Level Manager using the Find Service Level Manager field
8. Move to the Targets tab



Priority	Response Time	Restoration Time	Resolution Time	24 x 7 support	Alert
Urgent	6 Hours	12 Hours	24 Hours	Yes	None
High	12 Hours	24 Hours	48 Hours	Yes	None
Medium	18 Hours	36 Hours	72 Hours	Yes	None
Low	24 Hours	48 Hours	96 Hours	Yes	None

9. Complete the following information:

SLA Editor

Targets

Targets

Common: Select Common if the UC is to apply across Incidents, Requests, Problems and Change Management.

Per Process: If the UC is specific to a Process, select Per Process and choose a Process displayed in the drop-down list.

Interval

Define if the time is to be calculated in Hours or Minutes.

Service Time

SLA Editor

Priority	Urgent, High, Medium and Low
Milestones	
Initial Response	The maximum time the Customer would wait from the point of request creation before receiving a Note update for a Technician. The Response trigger is stopped when a Note has been added to the request by the assigned Technician and an email is sent to the Customer. If the Response Time is reached, without a Note being added, the request will be escalated.
Restoration Time	The maximum time the Customer would wait from the time the request was created until a workaround or temporary fix has been implemented. The Restoration trigger stops by assigning the request a Workflow State that has to the UC Restoration option set to Yes. By default, this Workflow State is Open - Restored.
Resolution Time	The taken time from the point of request creation until it the request is moved to a Workflow State with the UC Resolution option set to Yes. Any of the default Workflow Exit States stop the Resolution Timer.
Notify Override	If the system is to override the default notification method set for a request when the Priority being edited is assigned to a request, check this option.
Notification Type	Set Email or SMS as the type of notification when the override action is applied to a Priority.
Alerts	
Reminder	Sends a reminder email to the Technician when the defined percentage of time elapses for a Response, Restoration or Resolution target that has not been met on a request. Can be set up to 200% of the UC. Note, Alert intervals are not cumulative.
Warning	Sends a warning email to the Technician when the defined percentage of time elapses for a Response, Restoration or Resolution target that has not been met on a request. Can be set up to 200% of the UC.
Escalation	Escalates the request to a higher escalation layer when the defined percentage of time elapses for a Response, Restoration or Resolution target that has not been met on a request. Can be set up to 200% of the UC. It should be noted that the Service Level Manager is also notified when an OLA is breached.
Support	
24 x 7	Do not amend if the UC is to apply 24 hours a day, 7 days a week.

SLA Editor

Normal Support

Select if service hours are to be defined for the UC. When checked, define the service hours by either selecting a template (Templates are configured by the Administrator in the Setup>Localization>Hours tab) or manually define the days and time by making selections within the drop-down lists.

10. Add one or multiple Warning Alerts, if required.

Enter the percentage of time to elapse for each interval, which will trigger a Warning to be sent via email to the Service Level Manager when the specified percentage is reached.

NOTE: Trigger intervals are not cumulative

For example, the Urgent default times of 6, 12 and 24, mean 6 hours for the Response stage, 12 hours for Restoration from initial creation, and 24 hours to reach the Resolution from initial service request creation.

1. Define the support hours

Within the Targets tab of the Underpinning Contracts Editor screen the default support hours are set to 24x7.

For 24 X 7, if the UC's urgent Initial Response field is set to six hours, and an urgent request that uses the UC is created at midnight in the assigned Technician's time zone, those six hours will expire by 6:00 AM. This is the option to use if your support is staffed 24 hours a day. Normal support ensures request timers do not run when Technicians are not available. For instance, if the support hours are 9:00 AM to 5:00 PM and the SLAs are as such, the urgent requests' timer would not start ticking until 9:00 AM the following business day and would expire at 3:00 PM.

2. Click Save
3. Click Done.

States Tab

The Underpinning Contract States tab lists the Workflow stages that are associated with the Underpinning Contract. This association is made within the relevant States of the Workflow and cannot be edited within this screen.

Workflows

- ◆ [“Incident & Problem Workflows” on page 639](#)
- ◆ [“Service Request & Change Management Workflows” on page 648](#)
- ◆ [“Release Workflow” on page 658](#)
- ◆ [“Status Notes” on page 665](#)
- ◆ [“Building Workflows” on page 667](#)

Incident & Problem Workflows

Workflows define the sequence of States to be followed by requests logged with the application. Within the system an unlimited number of Workflows can be configured for Incident and Problem Management.

When deployed, the system includes one fully customizable Workflow for each of the Incident and Problem Management Processes. These can be used immediately, or can be edited to reflect more comprehensively your support service requirements.

SLAs and Workflows

Each Workflow can be associated with one or more SLAs. The SLA provides the contract time that must be met by requests using the Workflow.

For example, if the Service Desk uses one Incident Workflow, which has multiple SLAs assigned to it, logged Incidents follow the same Lifecycle but the time allowed within each stage is based on the SLA contract requirements. The SLA assigned to either the Item, Customer, Organizational Unit or Incident determines which Workflow is selected for the Incident.

Editing default Incident and Problem Workflows

Incident and Problem Workflows can be configured to reflect the organizational Service Desk requirements for these processes. The default Workflows include States that are used by the business logic of the application to maintain control of the request Lifecycle.

It is recommended that the Selected States used by the application, as indicated by an asterisk, not be removed from the Workflow Lifecycle. However, other Available States can be added to the Selected States list.

The following table contains the default Incident and Problem Workflow States.

The * denotes the system-used States.

Default State	Description
Cancelled	Used to cancel a request when it is no longer to be worked on.
Cancelled Unpaid*	Used by the system from the Pending - No Contract State when Contracts and Invoices are enabled.
Closed Resolved	Used when the request has been resolved. This is the Default Closed State for the Incident and Problem Workflows. This start marks the end of SLA timing and is used when measuring SLA times for Reports.
Closed Restored	Used when the request has been closed and the service restored for the Customer. This start marks the end of SLA timing and is used when measuring SLA times for Reports.
On Hold	Used when the request is on hold. By default this State stops SLA timing.
On Hold - Client Action	Awaiting a response from the Customer. When a Note is added to the request by the Customer, the system will change the status to Open.

Default State	Description
On Hold - Pending Approval*	<p>An Incident automatically moves to this State when the "Propose" button is used for sending an Incident Note. This means the CloseRequest email is sent to the Customer asking them to verify the proposed Solution. If the Customer does not respond to the email, the request is automatically closed by the number of days set within the Handshaking Privilege. (The email handshaking option is set by the Administrator in Setup>Privileges> Requests.)</p> <p>By clicking on the URL provided in the email, the Customer ensures the request retains an open and active state.</p>
On Hold - Process Escalated*	<p>A request moves into this state when a Problem or Change has been created within the Analysis tab of the request. The timer stops and there are no future States as the request will be closed when the related Problem or Change is closed.</p>
Open	<p>Used to indicate that the request is currently open.</p>
Open Restored	<p>Used to identify that initial service to the Customer has been restored, or a Workaround is in place but the request is not resolved. This State stops the initial Response Timer if a Note has not been added to the request by a Technician.</p>
Pending	<p>The default first State for new requests.</p>
Pending - No Contract*	<p>Used when a request is created but there is no active Contract. A Contract needs to be created for either the Customer, Incident/Problem, Item or Organizational Unit.</p> <p>NOTE: Do not use this State as the Default Open State for a Workflow.</p>

Editing Template Workflows

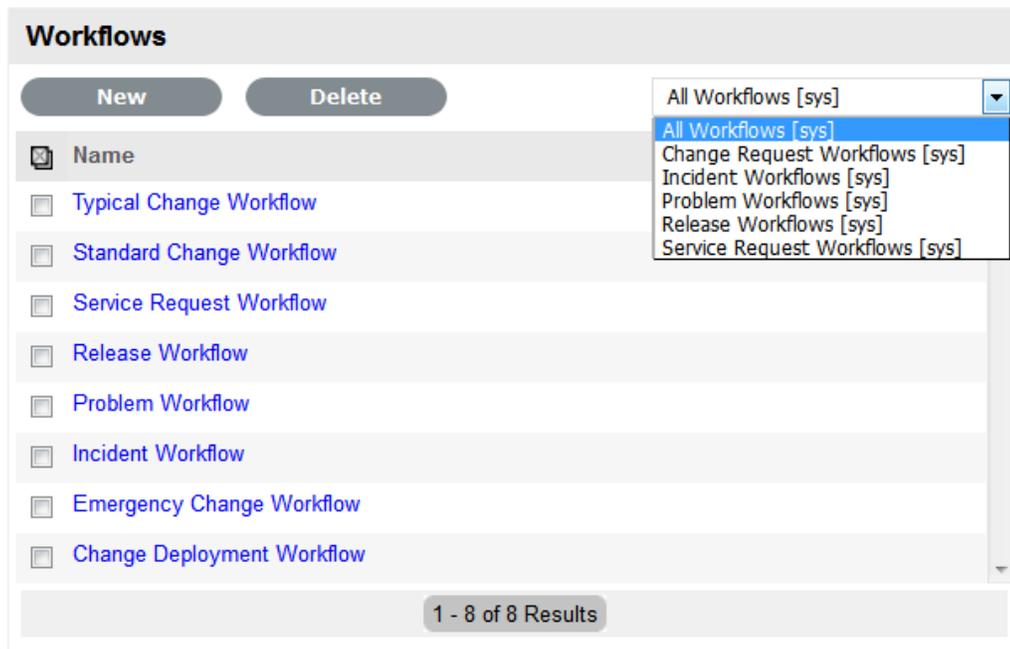
Prior to creating or editing existing Workflows, it is suggested that the preferred Workflow Lifecycle be mapped externally to the application.

If States are to be added or removed from the Workflow, it is recommended that all changes be made to the Current States list within a Workflow's Lifecycle tab, prior to mapping the Lifecycle. This ensures that all relevant status options exist in the Available States field, for allocation to the Previous and Next Workflow States.

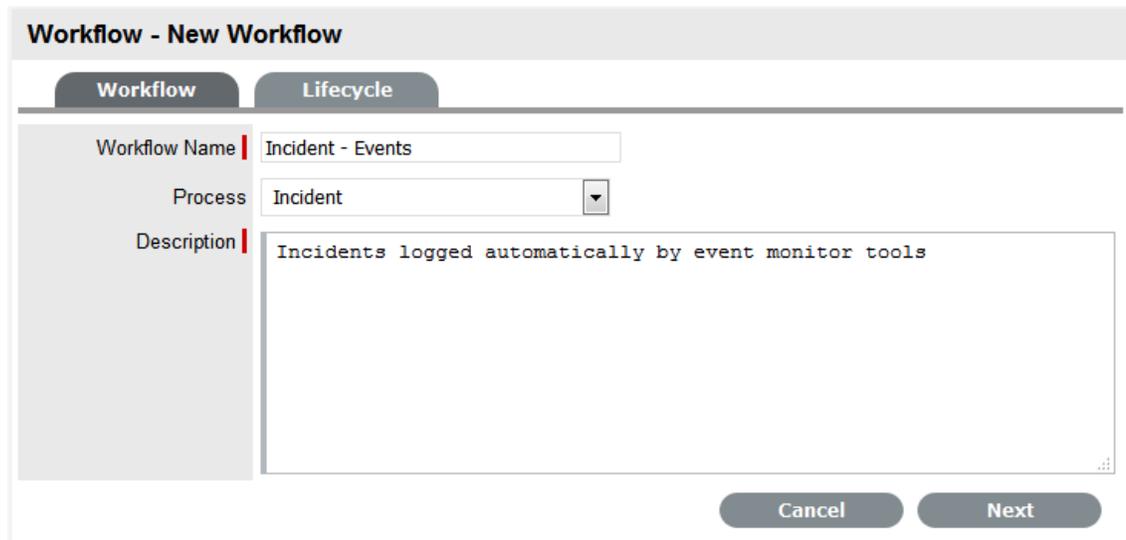
Once the Workflow Lifecycle has been defined, edit an existing Workflow by:

1. Select Service>Workflows

The Workflows screen appears.



2. Click the Workflow name hyperlink to modify or duplicate an existing template
Or, select New to create an entirely new Workflow. The Workflow tab appears and is used to define the Name, select the Process, set the default Open and Closed States for the Workflow. The States available within these lists are all those marked as an Entry or Exit point in the Lifecycle tab
3. Click Edit
The Duplicate button is displayed, select if relevant.
4. Complete the details of a new Workflow
Enter the Name, select the Process and enter a Description and click Next.



5. In Edit mode amend relevant details within the Workflows tab:

Field Name	Description
Workflow Name	Enter a relevant name for the Workflow.
Process	Select from the drop-down options the process type of Incident or Problem Workflow.
Default Open Status	The open State that a request adopts when it is assigned the Workflow.
Default Closed Status	The closed State that indicates the request has reached the end of the Workflow Lifecycle.
Email Note Action	<p>This applies to requests that are in a non-active SLA State (i.e., where the SLA Active option is set to No). The option selected here determines the system behavior, regarding an SLA inactive request, when an email is received from a Customer.</p> <ul style="list-style-type: none"> ◆ Do Nothing: Means the status of the request remains the same and the SLA timers are not re-activated. The email is added as a Note and also sent to the Technician. ◆ Update Status: Means the status of the request is changed to an SLA Timer Active state, the email is added as a Note and it also sent to the Technician.
Update Status to	This field is displayed when the Update Status option is selected for the Email Note Action field. It allows the User to set a Next State, which is defined as an SLA Timer Active State, where a request will move to after an email has been received from a Customer regarding a request in an inactive SLA State.
SLA	<p>Allows the User to assign an SLA to govern the lifecycle period of the Workflow. (See SLAs & Workflows above, for more information.)</p> <p>One or more SLAs can be associated with the Workflow.</p>
Description	Defines the purpose of the Workflow

6. Use the Find SLA option to change or add SLAs assigned to the Workflow

Click  to access the complete list of SLAs in the system. Refer to the above section for more information regarding SLAs and Workflows.

7. Edit the brief description that explains the purpose of the Workflow, if required

NOTE: The Contract Time field is visible when OLAs and/or Underpinning Contracts are associated with the Workflow States

It displays the accumulated amount of time of the OLAs and/or Underpinning Contract associated with the stages of the Workflow. This contract time cannot exceed the resolution time of the SLA assigned to the Workflow.

1. Click Save

Workflow - Workflow1

Workflow Lifecycle

Edit

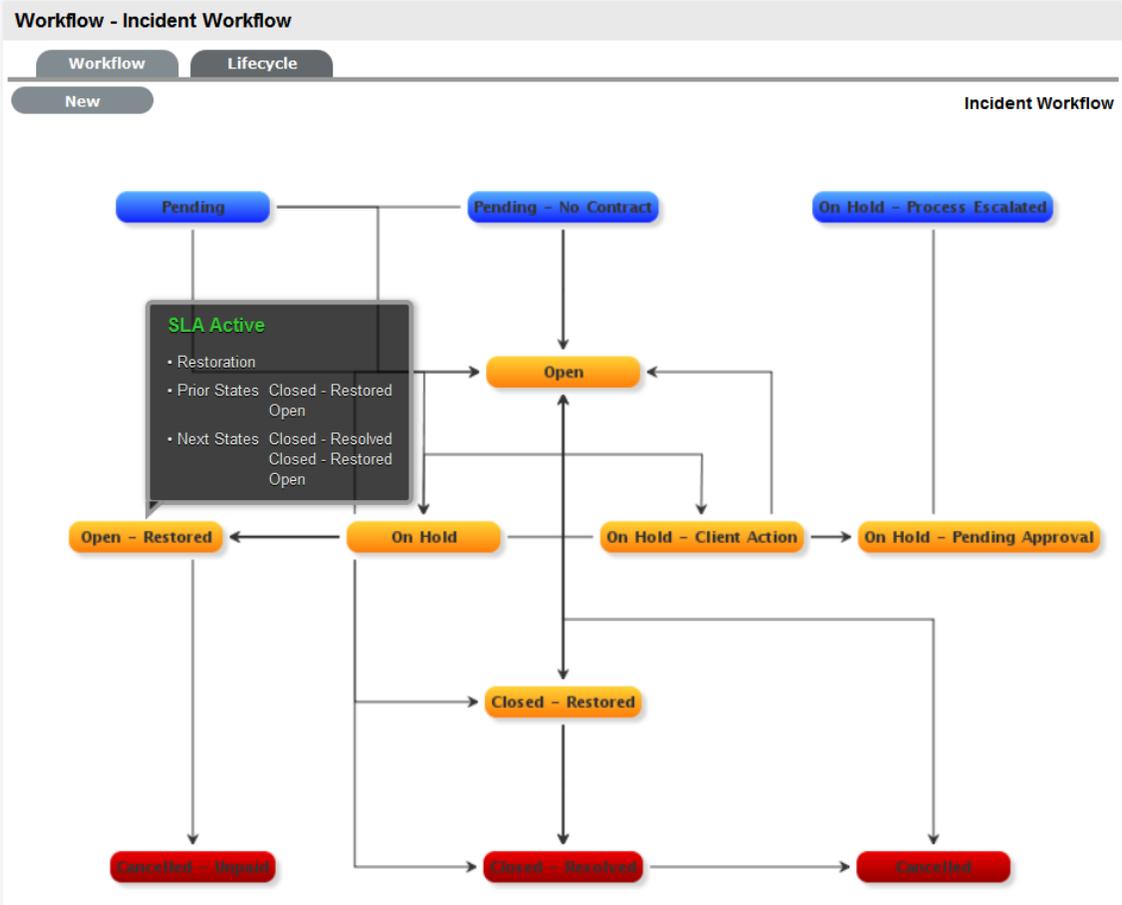
Workflow Name	Workflow1
Process	Incident
Default Open Status	Pending
Default Closed Status	Closed - Resolved
Note Action	Do nothing
SLA	SLA

Description

Incident Workflow

Done

2. Select the Lifecycle tab to define Workflow States



Adding or editing Workflow States:

1. Edit the State details

Click the State name hyperlink in the Workflow map or in the table of States, to display the Status information screen. Or, click New to create a new Workflow State.

Workflow - Incident Workflow

Workflow
Lifecycle
Status

Status

Name

Active State Yes No

Entry Point

Exit Point

Has Notes

Service

SLA Active Yes No

SLA Restoration Yes No

SLA Resolution Yes No

Contract Type None OLA Underpinning Contract

Previous States

Available states

On Hold - Process Escalated

Selected states

Closed - Restored
 On Hold
 On Hold - Client Action
 On Hold - Pending Approval
 Open - Restored
 Pending

Next States

Available states

Cancelled - Unpaid

Selected states

Cancelled
 Closed - Resolved
 Closed - Restored
 On Hold
 On Hold - Client Action
 On Hold - Pending Approval

Status

Name	System Required States, the States marked with an asterisk in the States Table, can be re-named if desired. For newly created States, enter a name.
Active State	<p>Assign Yes for requests to be available in the Home tab by default, when assigned to this stage of the Workflow.</p> <p>Yes should be used for States where the User is actively working on the request or waiting for updates."No" generally applies to Workflow exit points and will only be available by default within the relevant Process tab list view.</p>
Entry Point	<p>An Entry Point is used to indicate the start of a Lifecycle. To make the state a Workflow Entry Point, select the Entry Point checkbox.</p> <p>As the Entry Point is the first state, the Previous States field will be removed.</p>

Status	
Exit Point	<p>Select whether the State will be an Exit Point. An Exit Point is used to indicate the end of a Lifecycle.</p> <p>NOTE: A Workflow can have only one Entry Point but multiple Exit Points.</p>
Has Notes	<p>Allows the Supervisor to include instructions or add relevant details for requests that move into this State. The information is configured within the Articles tab that is displayed when this option is enabled.</p>
Listener Class	<p>This field is visible if the Outbound Web Services option is enabled in the Admin>Setup>Privileges>System tab.</p> <p>Complete this field, if assigning this State to a request is to trigger an event in an external system.</p> <p>This field should contain the name of a Java class that implements the interface <code>com.livetime.ws.listenWorkflowListener</code> that has been compiled into a jar file and added to the LiveTime classpath. Please contact support for further details.</p>
SLA Active	<p>Links the status with timing set within SLAs and OLAs. When the option is set to No, the SLA/OLA timers stop and the triggers for escalations and warnings do not fire.</p>
SLA Restoration	<p>When timing is set using SLAs and OLAs, the SLA Restoration Time trigger is disabled when the request is moved to this state. Restoration Time indicates a Customer has access restored or a temporary workaround. Reports on Restoration Time are measured from when the Restoration Time trigger is disabled.</p>
SLA Resolution	<p>Allows the State selected to be used to mark the SLA Resolution Time. This will be used in SLA reporting.</p>
Contract Type	<p>Defines if the Workflow State will be managed by an internal (OLA) or external (Underpinning Contract) support agreement. If OLAs or Underpinning Contracts are assigned to a Workflow Lifecycle, the Workflow SLA Resolution Time cannot be exceeded by the sum of Resolution Times for all Contract Types assigned to the Workflow Lifecycle.</p>
Assign SLM	<p>This field is displayed when an UC is associated with the Workflow State. Use this field to define if the request ownership is to be maintained by the Assigned Technician or moved to the Manager of the SLA associated with the request.</p>

Status

Previous States

If the State is not an Entry Point, use the arrow button to select Previous States from the Available States and choose when this State will appear as a drop-down menu option in the Next Action field.

Next States

If the State is not an Exit Point, use the arrow button to select the Next States. A request can move to, in the Next Action field of a request Information Summary tab.

2. Delete the State if required, or Name/Rename the State
3. Enter all State information up to the SLA Resolution field
4. Save the updated State details

NOTE: It is recommended all States that are to be included in the Workflow be added or re-named now

After all States have been entered in the system, the mapping of the Workflow can be more easily achieved.

1. Continue to edit, add or delete States until all relevant States exist for the Workflow
2. To create the Workflow Lifecycle, States need to be assigned to the transitional states of Previous and/or Next

To move Available States to the Previous State or Next State field, open the Status Details screen by clicking the State object in the Workflow map or select the State hyperlink in the table beneath the Workflow map.

3. Assign States to be Next and/or Previous States

For the Current Status highlight an option in the Available State list and click the right-pointing arrow to move it to the Selected States field.

NOTE: When a State is used as a Previous and a Next State, it allows a request to move forward and backward in a Lifecycle

An Open State cannot have any previous States and a Closed State cannot have any Next States.

4. Click Save to return to the Workflow map and to access other States to build on the Workflow Lifecycle
 5. Repeat Steps 14 to 16 until all transitional stages of the Workflow have been mapped
-

NOTE: To successfully save a Workflow, the sum Resolution Time of the individual Contract Types assigned to each transitional state of the Workflow Lifecycle, must be less than or equal to the Workflow's SLA Resolution Time

1. Click Save.

The visual representation of the Workflow is displayed.

Workflow Map

The Workflow Map is a visual representation of the Workflow Lifecycle. The map displays the relationship between each Lifecycle State by using different colors to represent the type of Lifecycle State.

Color	
Blue	Indicates the Entry point of the Lifecycle.
Orange	Is a Transitional stage of the Lifecycle.
Red	Indicates the Exit point of the Lifecycle.

Detailed information about a Lifecycle State can be accessed by clicking on the State field within the map.

Deleting a Workflow State

It may be necessary to delete a default State or a State that is no longer in use. Note that a State cannot be deleted if it has been assigned to a request.

To delete an unused State:

1. Select Service>Workflows
2. Click on the Workflow Name hyperlink
3. Click on the State Name hyperlink in the States Table beneath the Workflow Map
4. Click Delete
5. Select Save.

The State will be erased from the States list.

Service Request & Change Management Workflows

Service Request and Change Management Workflows define the sequence of States to be followed by Service Requests and Change Requests (RFC) logged with the Service Desk. These Workflows are unlimited and fully configurable, to cover the diverse range of business change implementations required by an organization.

SLAs and Workflows

Each Workflow can be associated with one or more SLAs. The SLA provides the contract time that a Workflow must adhere to.

For example, if the Service Desk uses a Change Workflow, which has multiple SLAs assigned to it, Change Requests that use that Workflow follow the same Lifecycle but the time allowed within each stage is based on the SLA contract requirements. The SLA assigned to either the Item, Customer, Organizational Unit or Request determines which Workflow is selected for the Change Request.

Approval States

Approval States in Service Request and Change Workflows provide the facility for Customers, Line Managers and Manager Users to accept or reject Request activity. If a State has the Approval State option enabled, the type of Approval determines who, be it a Manager or Customer User, is assigned to the State and it is not possible for other User Roles to also be assigned to the State.

Requests assigned a Customer or Line Manager Approval State can be processed through the Customer Portal or via Email. A request can only be assigned a Line Manager Approval State if the Customer associated with the Request is assigned with a Line Manager within their Customer Information screen. The system will validate this association prior to saving the Request and the User assigned to the Request when moved into the Line Manager Approval State will be the Line Manager defined in the Customer Information screen. When Requests are in a Customer or Line Manager Approval State, the only User who can edit the Request is the Team Lead.

Team Manager Approval States only allow Users with the Manager Role to be assigned to the State. It should be noted that a Technician, Supervisor or Partner User can also be assigned a Manager Role within their User Information screen, which will allow them to be assigned as Managers in the Team and then to Manager Only Approval States. The Managers are associated with an Approval State within the Team Information screen. First, define the Manager Group within the Group tab of the Team Information screen, and then assign that Group to the relevant Workflow State in the States tab of the Team Information screen.

Editing a Default Workflow

To edit a Service Request or Change Workflow:

1. Select Service>Workflows

The Workflows screen appears.

2. Click the Workflow name hyperlink to modify or duplicate an existing template

Or, select New to create an entirely new Workflow. The Workflow tab appears and is used to select the Process, set the default Open and Closed States for the Workflow. The States available within these lists are all those marked as an Entry or Exit point in the Lifecycle tab.

3. Click Edit

The Duplicate button becomes available, select if relevant.

4. Complete the details for a new Workflow

Enter the Name, select the Process and enter a Description and click Next.

Workflow - Problem Workflow

Workflow | Lifecycle

Edit

Workflow Name	Problem Workflow
Process	Problem
Default Open Status	Pending
Default Closed Status	Closed - Resolved
Note Action	Do nothing
SLA	
Description	Configurable Problem Management workflow

Done

5. In Edit mode amend relevant details within the Workflows tab:

Field Name	Description
Workflow Name	Enter a relevant name for the Workflow.
Process	Select from the drop-down options the process type of Change or Service Request Workflow.
Default Open Status	The open state that a Request adopts when it is assigned the Workflow.
Default Closed Status	The closed state that indicates the Request has reached the end of the Workflow Lifecycle.
Email Note Action	<p>This applies to Requests that are in a non-active SLA State (i.e., where the SLA Active option is set to No). The option selected here determines the system behavior, regarding an SLA inactive Request, when an email is received from a Customer.</p> <ul style="list-style-type: none"> ◆ Do Nothing: Means the status of the Request remains the same and the SLA timers are not re-activated. The email is added as a Note and also sent to the Technician. ◆ Update Status: Means the status of the Request is changed to an SLA Timer Active State, the email is added as a Note and it also sent to the Technician.

Field Name	Description
Update Status to	This field is displayed when the Update Status option is selected for the Email Note Action field. It allows the User to set a Next State, which is defined as an SLA Timer Active State, where a request will move to after an email has been received from a Customer regarding a Request in an inactive SLA State.
SLA	Allows the User to assign a SLA to govern the lifecycle period of the Workflow.(See SLAs & Workflows above, for more information.)
Description	Defines the purpose of the Workflow

6. Use the Find SLA option to change or add SLAs assigned to the Workflow

Click  to access the complete list of SLAs in the system. Refer to the above section for more information regarding SLAs and Workflows.

Workflow - Problem Workflow

Workflow
Lifecycle

Duplicate

Workflow Name |

Process | Problem

Default Open Status |

Default Closed Status |

Note Action | Do nothing Update status

SLA

Find SLA (Name)

SLA

Warranty

1 - 1 of 1 Results

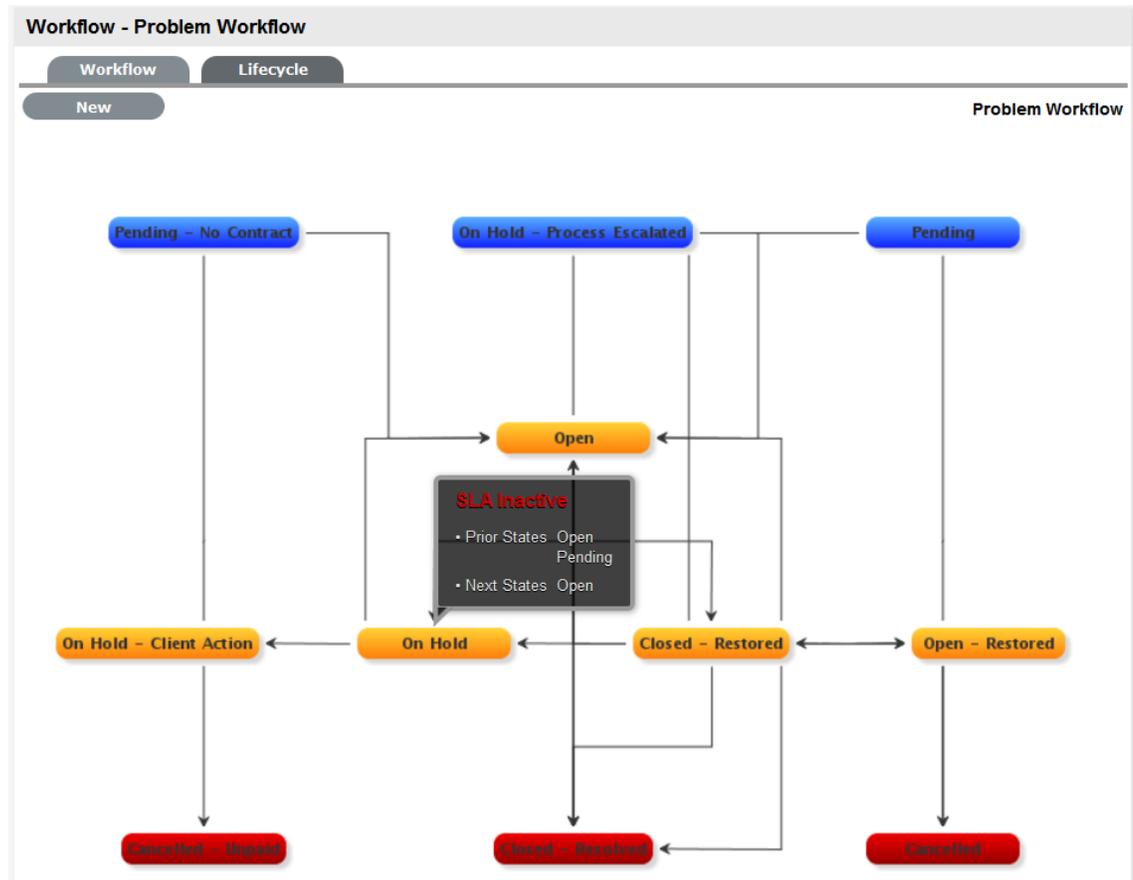
Description |

Cancel
Save

NOTE: The Contract Time field is visible when OLAs and/or Underpinning Contracts are associated with the Workflow States

It displays the accumulated amount of time of the OLAs and/or Underpinning Contract associated with the stages of the Workflow. This contract time cannot exceed the resolution time of the SLA assigned to the Workflow.

7. Edit the brief description that explains the purpose of the Workflow, if required
8. Click Save
9. Select the Lifecycle tab to create or modify Workflow States



Adding or editing Workflow States:

1. Click the State field in the Workflow map or State name hyperlink to display the Status information screen
- Or, click New to create a new Workflow State.

Workflow - Problem Workflow

Workflow Lifecycle Status

Status

Name

Active State Yes No

Entry Point

Exit Point

Has Notes

Service

SLA Active Yes No

SLA Restoration Yes No

SLA Resolution Yes No

Contract Type None OLA Underpinning Contract

Previous States

Available states

- Closed - Restored
- On Hold - Client Action
- On Hold - Process Escalated
- Open - Restored
- Pending - No Contract

Selected states

- Open
- Pending

Next States

Available states

- Cancelled
- Cancelled - Unpaid
- Closed - Resolved
- Closed - Restored
- On Hold - Client Action
- Open - Restored

Selected states

- Open

Delete Cancel Save

Status

Name	System Required States, the States marked with an asterisk in the States Table, can be re-named if desired. For newly created States, enter a name.
Active State	<p>Assign Yes for requests to be available in the Home tab by default, when assigned to this stage of the Workflow.</p> <p>Yes should be used for States where the User is actively working on the request or waiting for updates. No generally applies to Workflow exit points and will only be available by default within the relevant Process tab list view.</p>
Approval State	<p>Sets the Status as an Approval State. This allows a Manager User to be assigned to this State, which enables them to approve or reject a Request when it moves into this stage of the Workflow.</p> <p>NOTE: An Entry/Exit status cannot be an Approval State.</p>

Status

Item Editable	<p>Select this option to allow the details of an Item to be edited when a Request is moved into this State . When this option is enabled for a Workflow State,  is visible next to the Item Type link in the Summary tab of the Request.</p>
KBA Approval	<p>Enable this option as part of the KBA Approval process, which displays the Accept, Revise and Reject buttons for the User to publish, advise content revision or reject content.</p> <p>Enabling this option, removes the Next States fields and requires the User to define where the request will move to if the Accept and Reject buttons are selected. If the Revise button is selected, the Request will move to the "On Hold - KBA Rework" system state.</p>
Entry Point	<p>An Entry Point is used to indicate the start of a Lifecycle. To make the state Workflow Entry Point, select the Entry Point checkbox.</p> <p>As the Entry Point is the first state, the Previous States field will be removed.</p>
Exit Point	<p>Select whether the state will be an Exit Point. An Entry Point is used to indicate the end of a Lifecycle.</p> <p>NOTE: A Workflow can have only one Entry Point but multiple Exit Points.</p>
Has Notes	<p>Allows the Supervisor to include instructions or add relevant details for Requests that move into this State. The information is configured within the Notes tab that is displayed when this option is enabled.</p> <p>Information and attachments included on the Notes tab, are displayed as a scroll-over when the Request moves into the State.</p>
Listener Class	<p>This field is visible if the Outbound Web Services option is enabled in the Admin>Setup>Privileges>System tab.</p> <p>Complete this field, if assigning this State to a request is to trigger an event in an external system.</p> <p>This field should contain the name of a Java class that implements the interface <code>com.livetime.ws.listenWorkflowListener</code> that has been compiled into a jar file and added to the LiveTime classpath. Please contact support for further details.</p>
SLA Active	<p>Links the Status with timing set within SLAs and OLAs. When the option is set to No, the SLA/OLA timers stop and the triggers for reminders, escalations and warnings do not fire.</p>

Status

SLA Restoration	If the 'Yes' option is selected for SLA Restoration, it means that Requests that move into this Stage of the Workflow have met the SLA Restoration Time.
SLA Resolution	If the Yes option is selected for SLA Resolution, it means that Requests that move into this Stage of the Workflow have met the SLA Resolution Time.
Contract Type	Defines if the Workflow State will be managed by an internal (OLA) or external (Underpinning Contract) support agreement. If OLA's or Underpinning Contracts are assigned to a Workflow Lifecycle, the Workflow SLA Resolution Time cannot be exceeded by the sum of Resolution Times for all Contract Types assigned to the Workflow Lifecycle.
Assign SLM	This field is displayed when an UPC is associated with the Workflow State. Use this field to define if the request ownership is to be maintained by the Assigned Technician or moved to the Manager of the SLA associated with the request.
Previous States	If the State is not an Entry Point, Previous States can be assigned to the Workflow stage. Highlight the relevant State and use the arrow button to move Available States to the Previous States field. These options designate the Workflow stages a Request can come from, before it arrives in this Workflow State.
Next States	If the State is not an Exit Point, Next States can be assigned to the Workflow state. Use the arrow button to select the Next States from the Available States. These options are included in the Next Action drop-down menu of a Request.

Status

Accept State

(Visible when the Approval State or KBA Approval option is Yes.)

Approval

Displays the States that a Request can move to when a Request action is Accepted. Select the appropriate State, for the system to automatically route the Request when the Accept option is selected.

- ◆ *Customer* when selected, means the request will be assigned to the Customer associated with the request to accept/reject request activity. The Customer will be able to access the accept/reject icons in the Customer Portal to process the request.
- ◆ *Line Manager*, select if the request is to be forwarded to a system user with the Customer Role, who will process the approval in relation to the Customer associated with the request. The Customer/Line Manager will be able to access the accept/reject icons in the Customer Portal to process the request.
- ◆ *Team Manager* select if a single Manager User assigned to the Team is to process the Request.
- ◆ *Team Managers#* if selected, set the number of Managers that are required to Approve the Request before the system will automatically apply the defined Accept or Reject State.
- ◆ *Team Managers%* if selected, set the percentage weighting that must be achieved by Managers voting before the system will automatically apply the defined Accept or Reject State. When selected, define the percentage weighting.

Reject State

(Visible when the Approval State or KBA Approval option is Yes.)

Displays the States that a Request can move to when a Request action is Rejected. Select the appropriate State, for the system to automatically route the Request when the Reject option is selected.

2. Delete the State if required, or Name/Rename the State
 3. Enter all State information up to the SLA Resolution field
 4. Save the updated State details
-

NOTE: It is recommended that all States that are to be included in the Workflow be added or re-named now

After all States have been entered in the system, the mapping of the Workflow can be more easily achieved.

1. Continue to edit, add or delete States until all relevant States exist for the Workflow
2. To create the Workflow Lifecycle, States need to be assigned to the transitional states of Previous and/or Next

To move Available states to the Previous State or Next State field, open the Status details screen by clicking the State field in the Workflow map or select the State hyperlink in the table beneath the Workflow map.

3. Assign States to be Next and/or Previous States

For the Current Status highlight an option in the Available State list and click the right-pointing arrow to move it to the Selected States field.

NOTE: When a State is used as a Previous and a Next State, it allows a request to move forward and backward in a Lifecycle

An Open State cannot have any previous States and a Closed State cannot have any Next States.

1. Click Save to return to the Workflow map and to access other States to build on the Workflow lifecycle.
 2. Repeat Steps 13 to 16 until all transitional stages of the Workflow have been mapped.
-

NOTE: To successfully save a Workflow, the sum Resolution Time of the individual Contract Types assigned to each transitional state of the Workflow Lifecycle, must be less than or equal to the Workflow's SLA Resolution Time.

1. Click Save.

The visual representation of the Workflow is displayed.

Workflow Map

The Workflow Map is a visual representation of the Workflow Lifecycle. The map displays the relationship between each Lifecycle State by using different colors to represent the type of Lifecycle State.

Color

Blue	Indicates the Entry point of the Lifecycle.
Orange	Is a Transitional stage of the Lifecycle.
Red	Indicates the Exit point of the Lifecycle.

Detailed information about a Lifecycle State can be accessed by clicking on the State field within the Map.

Deleting an Unassigned Workflow

To delete an unassigned Service Request or Change Workflow:

1. Select Service>Workflow

The Workflows screen appears.

2. Select the checkbox to the left of the Workflow to be deleted
3. Click Delete

The checked Workflow is no longer visible.

NOTE: A Workflow that belongs to a Team cannot be deleted.

Deleting a Workflow State

It may be necessary to delete a system default State or a State that is no longer in use. Note that a State cannot be deleted if it has been assigned to a Request.

NOTE: It is recommended that any States listed in the table of States included on the Life Cycle tab that are not included in the Workflow or used by the system, be removed from the table as all States included here are listed in the States tab when Workflow Technician assignment is being configured. By removing unused States from the table, assigning Technicians to the relevant stages of the Workflow becomes an easier task.

To delete an unused State:

1. Select Service>Workflows
2. Click on the Workflow hyperlink
3. Move to the Lifecycle tab
4. Select the State name link in the table of States included in the Lifecycle tab.
5. Click Delete
6. Click Done.

Release Workflow

Release Workflows define the sequence of States to be followed for Releases logged within the Change>Release tab. By default the system includes one Release Workflow that can be adjusted to suit the service organization's requirements. There is no limit to the number of fully configurable Release Workflows that can be created in the system, so the diverse range of business release implementations required by an organization can be covered by the service and support organization.

Approval States

Approval States in Release Workflows provide the facility for Release Managers that have been assigned to the Approval State, to accept or reject Release activity. If Release Managers are to be assigned to an Approval State, then it is not possible for other User Roles to also be assigned to that State. It should be noted that a Technician, Supervisor or Partner user can also be assigned a Manager Role, which will allow them to be assigned to Manager Only Approval States.

Editing the Default Workflow

To edit or duplicate the default Release Workflow:

1. Select Service>Workflows
2. Click the Release Workflow hyperlink to modify the template details or copy the Workflow

Workflow - Release Workflow

Workflow Lifecycle

Duplicate

Workflow Name | Release Workflow

Process Release

Default Open Status Plan

Default Closed Status Closed

Description | Configurable Release Management workflow

Cancel Save

3. Click Edit, to amend or duplicate the Workflow
Fields in the following table are now editable

Field Name	Description
Workflow Name	Enter a relevant name for the Workflow.
Process	Release Management is assigned as the Workflow Process.
Default Open Status	The open State that a Release automatically applies when it is assigned the Workflow.
Default Closed Status	The Exit State that indicates the Release has reached the end of the Workflow Lifecycle.
Description	Defines the purpose of the Workflow.

4. Click Duplicate, if the default Workflow is to be copied
5. Amend the Release Workflow details as required
6. Click Save

7. Select the Lifecycle tab to create or modify Workflow States



Adding or editing Workflow States:

1. Click the State field in the Workflow map or State name hyperlink to display the Status information screen
Or, click New to create a new Workflow State.

Workflow - Release Workflow

Workflow
Lifecycle
Status

Status

Name

Active State Yes No

Approval State Yes No

Deployment State Yes No

Entry Point

Exit Point

Has Notes

Previous States

Available states		Selected states
Build Deploy Deploy Approval Plan Plan Approval Rework	▶	None selected

Next States

Available states		Selected states
Build Closed Deploy Deploy Approval Plan Approval Rejected	▶	None selected

Cancel
Save

Status

Name	System Default States can be re-named if desired. For newly created States, enter a name.
Active State	<p>Assign Yes for requests to be available in the Home tab by default, when assigned to this stage of the Workflow.</p> <p>Yes should be used for States where the User is actively working on the request or waiting for updates." No" generally applies to Workflow exit points and will only be available by default within the Release tab list view.</p>
Approval State	<p>Sets the Status as an Approval State. This allows a Release Manager to be assigned to this State and enables them to approve or reject Release Activity when it moves into this stage of the Workflow.</p> <p>NOTE: An Entry/Exit status cannot be an Approval State.</p>
Deployment State	If enabled for a State, when a Release is assigned this State the Deployment Tasks associated with the Release can be actioned by the Technician Users.

Status	
Entry Point	<p>An Entry Point is used to indicate the start of a Lifecycle. To make the State a Workflow Entry Point, select the Entry Point checkbox.</p> <p>As the Entry Point is the first State, the Previous States field will be removed.</p>
Exit Point	<p>Select if the State will be an Exit Point. An Entry Point is used to indicate the end of a Lifecycle.</p> <p>NOTE: A Workflow can have only one Entry Point but multiple Exit Points.</p>
Has Notes	<p>Allows the Supervisor to include instructions or add relevant details to the Workflow that is made available when the Release moves into the State. The information is configured within the Notes tab that is displayed when this option is enabled.</p> <p>Information and attachments included on the Notes tab, are displayed as a scroll-over when the Release moves into the State.</p>
Listener Class	<p>This field is visible if the Outbound Webservices option is enabled in the Admin>Setup>Privileges>System tab.</p> <p>Complete this field, if assigning this State to a request is to trigger an event in an external system.</p> <p>This field should contain the name of a Java class that implements the interface <code>com.livetime.ws.listenWorkflowListener</code> that has been compiled into a jar file and added to the LiveTime classpath. Please contact support for further details.</p>
Previous States	<p>If the State is not an Entry Point, Previous States can be assigned to the Workflow stage. Highlight the relevant State and use the arrow button to move Available States to the Previous States field. These options designate the Workflow stages a Release can come from, before it arrives in this Workflow State.</p>
Next States	<p>If the State is not an Exit Point, Next States can be assigned to the Workflow state. Use the arrow button to select the Next States from the Available States. These options are included in the Next Action drop-down menu of a Request.</p>
Accept State	<p>(Visible when the Approval State option is Yes.)</p> <p>Displays the States that a Request can move to when a Release action is Accepted. Select the appropriate State, for the system to automatically route the Release when the Accept option is selected.</p>

Status

Approval

(Visible when the Approval State or KBA Approval option is Yes.)

Displays the States that a Request can move to when a Request action is Accepted. Select the appropriate State, for the system to automatically route the Request when the Accept option is selected.

- ◆ *Team Manager*, select if a single Manager User assigned to the Team is to process the Request.
- ◆ *Team Managers#* if selected, set the number of Managers that are required to Approve the Request before the system will automatically apply the defined Accept or Reject State.
- ◆ *Team Managers%* if selected, set the percentage weighting that must be achieved by Managers voting before the system will automatically apply the defined Accept or Reject State. When selected, define the percentage weighting.

Reject State

(Visible when the Approval State option is Yes.)

Displays the States that a Release can move to when a Release activity is Rejected. Select the appropriate State, for the system to automatically route the Release when the Reject option is selected.

2. Configure the State details, as required
3. Save the updated State details

NOTE: It is recommended that all States that are to be included in the Workflow be added or re-named now

After all States have been entered in the system, the mapping of the Workflow can be more easily achieved.

4. Continue to edit, add or delete States until all relevant States exist for the Workflow
5. To create the Workflow Lifecycle, States need to be assigned to the transitional states of Previous and/or Next

To move Available States to the Previous State or Next State field, open the Status Details screen by clicking the State object in the Workflow map or select the State hyperlink in the table beneath the Workflow map.

6. Assign States to be Next and/or Previous States

For the Current Status highlight an option in the Available State list and click the right-pointing arrow to move it to the Selected States field.

NOTE: When a State is used as a Previous and a Next State, it allows a request to move forward and backward in a Lifecycle

An Open State cannot have any previous States and a Closed State cannot have any Next States.

7. Click Save to return to the Workflow map and to access other States to build on the Workflow lifecycle.
 8. Repeat Steps 12 to 14 until all transitional stages of the Workflow have been mapped.
-

NOTE: To successfully save a Workflow, the sum Resolution Time of the individual Contract Types assigned to each transitional state of the Workflow Lifecycle, must be less than or equal to the Workflow's SLA Resolution Time

9. Click Save.
The visual representation of the Workflow is displayed.

Workflow Map

The Workflow Map is a visual representation of the Workflow Lifecycle. The map displays the relationship between each Lifecycle State by using different colors to represent the type of Lifecycle State.

Color

Blue	Indicates the Entry point of the Lifecycle.
Orange	Is a Transitional stage of the Lifecycle.
Red	Indicates the Exit point of the Lifecycle.

Detailed information about a Lifecycle State can be accessed by clicking on the State field within the Map.

Deleting the default Release Workflow

To delete the default Release Workflow:

1. Select Service>Workflow
The Workflows screen appears.
 2. Select the checkbox to the left of the Release Workflow
 3. Click Delete
The checked Workflow is no longer visible.
-

NOTE: A Workflow that belongs to a Team cannot be deleted.

Deleting a Workflow State

It may be necessary to delete a system default State or a State that is no longer in use. Note that a State cannot be deleted if it has been assigned to a Release.

NOTE: It is recommended that any States listed in the table of States included on the Life Cycle tab that are not included in the Workflow or used by the system, be removed from the table as all States included here are listed in the States tab when Workflow Manager assignment is being configured. By removing unused States from the table, assigning Technicians to the relevant stages of the Workflow becomes an easier task.

To delete an unused State:

1. Select Service>Workflows
2. Click on the Workflow hyperlink
3. Move to the Lifecycle tab
4. Select the State name link in the table of States included in the Lifecycle tab
5. Click Delete
6. Click Done.

Status Notes

Status Notes can be assigned to Workflow States to provide the User with additional information about a stage within the Workflow Lifecycle. For example, the Status Note may contain conditions or contractual obligations relevant to the stage of the Workflow Lifecycle.

Assign a Status Note

To assign a Status Note to a Workflow State:

1. Select Service > Workflows tab
2. Select a Workflow
3. Click the Lifecycle tab and select a Workflow State
The status editor appears.
4. Select the Has Notes option
An additional Notes tab appears.

Workflow - Incident Workflow

Workflow Lifecycle Status Notes

Status

Name | Open

Active State Yes No

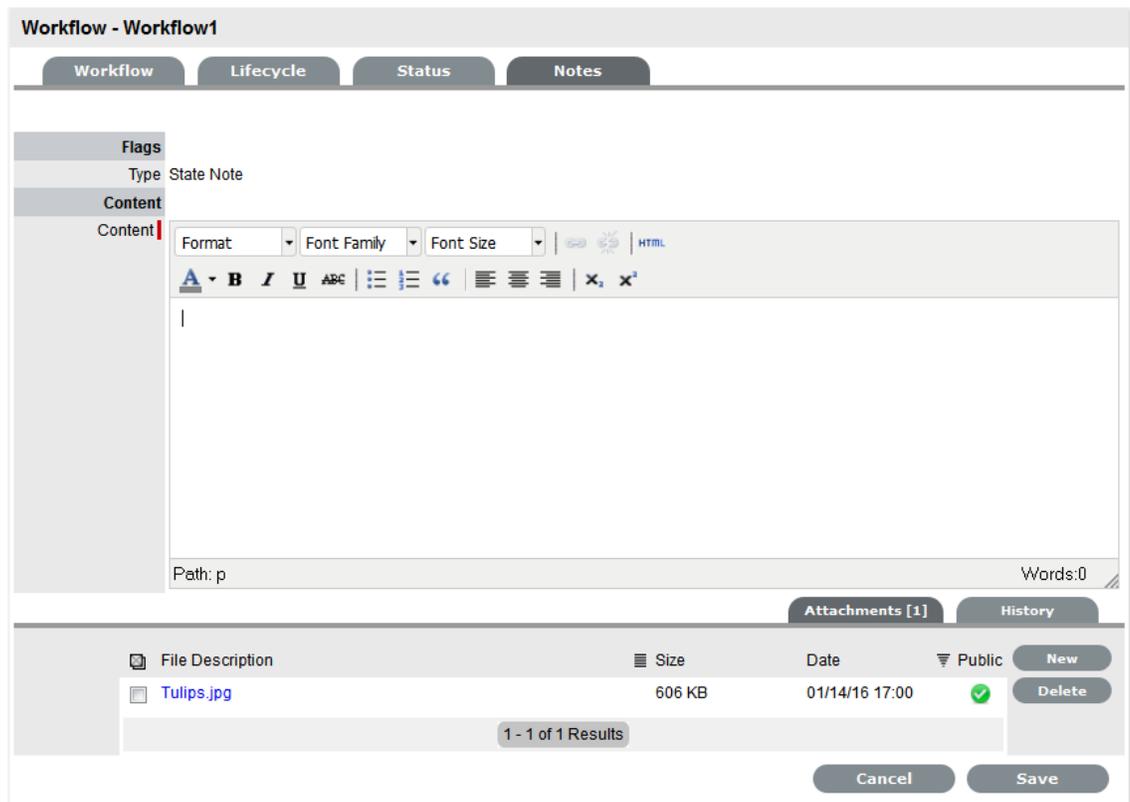
Entry Point

Exit Point

Has Notes

Check to display the Notes tab

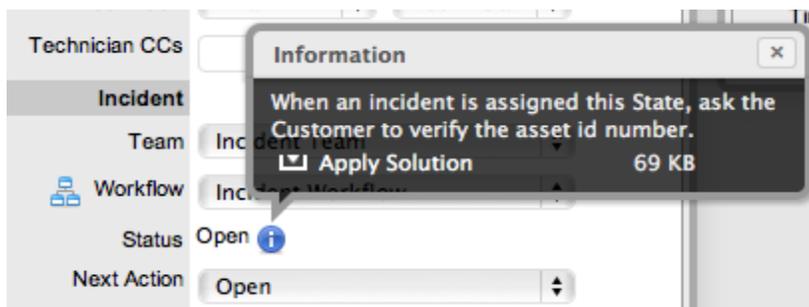
5. Select the Notes tab
6. Enter the Note content
7. Upload attachments, if required



8. Click Save
9. Return to the Workflows > Status tab
10. Click Save to exit the State editor.

Viewing a Status Note

When requests move into a State with a Status Note,  is displayed beside the Status field within the Summary tab of the request. Scroll over the  to view the Status Note and access any attachments.



Building Workflows

The flexibility of the service management system's fully configurable Workflows can at times provide a challenge for new installations and evolving support environments.

For new installations the default Workflows are generally quite suitable, but as Users become more familiar with the application and look to adapt the Workflow Lifecycle to better reflect the organizational requirements, an understanding of the elements included in the Workflow and how they impact other parts of the system is needed.

When building a new Workflow or adjusting a Default Workflow, it is advised that the Supervisor User map the Workflow Lifecycle outside of the application and define all possible pathways through the different stages of the Lifecycle, before commencing the configuration process in the service management system.

After each stage of the Lifecycle is identified, then consideration needs to be given to the specific requirements of each Workflow State. These include:

Workflow - Incident Workflow

Workflow	Lifecycle	Status	Notes
Status			
Name	<input type="text" value="Open"/>		
Active State	<input checked="" type="radio"/> Yes <input type="radio"/> No		
Entry Point	<input type="checkbox"/>		
Exit Point	<input type="checkbox"/>		
Has Notes	<input checked="" type="checkbox"/>		

Check to display the Notes tab

Is this an active stage of the Workflow?

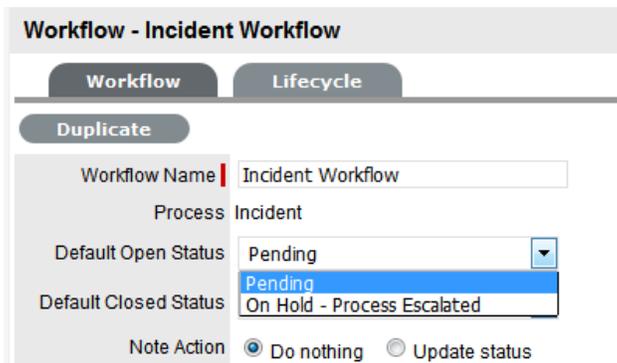
If the request assigned this stage of the Workflow is to appear in the My Tasks filter for Technicians, (i.e., on their Home tab), then it should be marked as Active State: Yes.

The Active State flag implies an Open State, so anything in an Active stage of the Workflow will be included in the report results for Open requests. For example, Open Incidents by Priority or Open Problems by Age.

Requests in a Workflow stage assigned an Active State : No are, by default, not visible on the Home tab of Technicians and considered to be Closed from the perspective of the customer. This allows for follow up work to be performed that doesn't concern the customer.

Is this an Entry Point or Exit Point?

If the stage of the Workflow is to be where the request commences its journey through the Workflow Lifecycle, it is an Entry Point and no Previous stages exist before this State. Once a new Entry Point is saved within the Lifecycle tab, it can be set to the Default Open Status within the Workflows tab.



Workflow - Incident Workflow

Workflow Lifecycle

Duplicate

Workflow Name Incident Workflow

Process Incident

Default Open Status Pending

Default Closed Status Pending
On Hold - Process Escalated

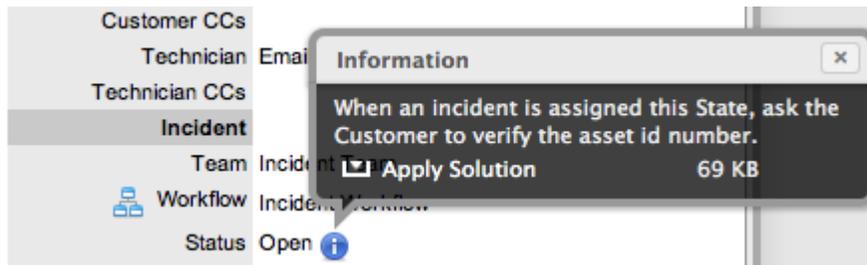
Note Action Do nothing Update status

If the stage of the Workflow is to be where the request ends its journey, it is an Exit Point and no Next stages can be assigned to it. This stage can also be defined as the Default Closed Status within the Workflows tab, after it has been created and saved within the Lifecycle tab.

If the stage is a transitional stage of the Workflow, it is neither marked as an Entry Point nor Exit Point of the Workflow.

Are there special instructions that need to be followed when the request enters this stage of the Workflow?

If the answer to this question is yes, then it is advisable to check the Has Notes option. By doing so, a Notes tab appears, which allows the Supervisor User to enter instructions that will become available to the Technician User when a request moves into this stage of the Lifecycle.



When a request moves into a Workflow stage with a Status Note,  is displayed next to the Status field in the request Information screen. Technicians can then view the notes by scrolling over the icon.

Workflows and Service Level Management

The next series of questions that need to be considered relate to Service Level Management.

Is this stage of the Workflow going to be managed by a contract? If so, will it be assigned to an internal support Team or external service provider?

The Contract Type option within the Workflow State allows the Supervisor User to manage each Workflow State with an agreement that specifies the response, restoration and resolution time for an internal or external service provider.

Using this information to configure the Workflow State, you need to consider when the request moves into this stage of the Workflow, will a specific Team of Technicians working within a specified timeframe be responsible for the request. If so, then select the OLA Contract Type.

Based on the understanding that Operational Level Agreements (OLAs) have been created in the application, select the OLA option from the list of configured OLAs that becomes available when the OLA Contract Type option is marked.

The Default Team option is displayed at this point, allowing the Supervisor to select from the Teams that have been assigned within the Teams tab of the OLA Editor screen. This Team is then assigned to the request upon entering this State.

Is this stage of the Workflow going to be outsourced to an external service provider? Have the outsourced service providers been configured in the system?

If the request is to be handled by an external service provider at this stage of the Workflow, then select the Underpinning Contract option. Choosing this option will display a list of pre-configured Underpinning Contracts, which are created within the Underpinning Contracts option of the Service tab.

It should also be noted that when the request moves into this stage of the Workflow, internally the request moves to the responsibility of the Service Level Manager, who is to ensure the external contractors meet their service obligations.

How do SLAs, OLAs, UPCs and Contract Time interact?

You will notice that when an OLA or UPC is assigned to a Workflow State, the State image included in the Lifecycle includes a clock icon. This indicates that it has drawn the resolution time from the OLA or UPC and assigned it to the Contract Time displayed within the Workflows tab. If one or multiple OLAs or UPCs are assigned to the Workflow, the system checks that the SLA resolution time is greater than the sum of all resolution times for the OLAs and UPCs assigned to the Workflow.

The application will not allow a Supervisor to save a Workflow stage, where the OLA or UPC resolution targets cause an SLA breach.

Tip: Before building a Workflow, configure OLAs and Underpinning Contracts within the relevant option of the Service Tab.

Is this stage of the Workflow to be measured by service level timers?

If Yes, set the SLA Active option to Yes, and when a request is in this stage of the Workflow, time will be recorded and measured against the response, restoration and resolution targets for the Service Level Agreement applied to the request.

Warnings and escalations configured for the SLA will be activated when target triggers are reached by the time accumulated in a service timer Active State.

If the SLA Timers are active, has the SLA Restoration time been met?

If the SLA Restoration time for the Priority of the SLA applied to the request has been met when the request enters this stage of the Workflow, this option should be set to Yes. This ensures that automated warnings and escalations are deactivated in relation to the customer's service being restored.

If the SLA Timers are active, has the SLA Resolution time been met?

If the SLA Resolution target for the Priority of the SLA applied to the request has been met when the request enters this stage of the Workflow, this option should be set to Yes. The SLA Resolution option within the Workflow State will ensure automated warnings and escalations will be deactivated in relation to the customer's issue being resolved.

Building the Workflow Lifecycle

Once the specific elements of the Workflow State have been configured, you are ready to build the Workflow Lifecycle - that is, map where a request can come from, and where it can go to.

As mentioned at the top of this document, when configuring a new Workflow or adding new Workflow States, the system advises that all stages be created in the system before mapping the Workflow Lifecycle. This will make mapping Previous and Next States a much simpler task.

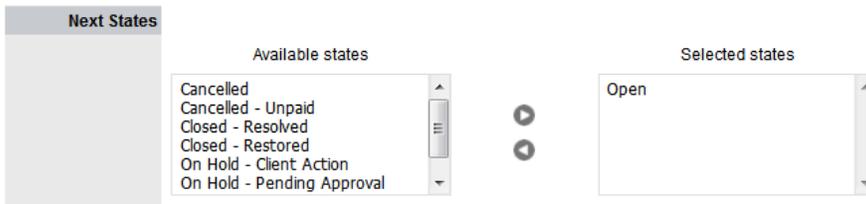


If this State is a transitional State (i.e., not an Entry Point or Exit Point), where can the request come from when moving into this stage?

Using the Workflow that has been drafted outside of the system, the Previous States are easily configured by selecting the State(s) where the request can reside immediately before moving into the Workflow State being edited from the Available State list, and moved to the Selected States field.

If this State is a transitional State (i.e., not an Entry Point or Exit Point), where can the request move to after this stage?

Using the Workflow that has been drafted outside of the system, the Next States are easily configured by selecting the State(s) where the request can move to immediately after the Workflow State being edited from the Available State list, and moved to the Selected States field.



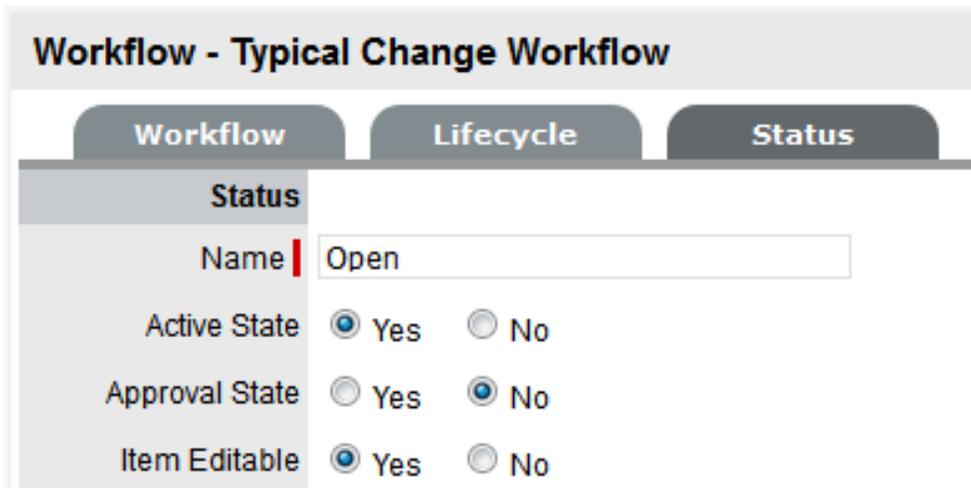
The ability to move a request between two States can easily be achieved by assigning the two relevant States to the Available States list, within the Next States field for each State.

Service and Change Request Workflows

When building a Request Fulfilment or Change Management Workflow there are a couple of additional options that need to be considered, these include:

When a request moves into this stage of the Workflow, does the assigned Technician need to edit the information on the Details tab of the Item associated with the request?

The Item Editable option within a Request Workflow takes into consideration that activities undertaken within this stage of the Workflow may result in the need to amend information recorded against the Item associated with the request. By not allowing items to be edited at every stage of the Request Workflow, greater control is maintained over changes made to the CMDB.



Is management or customer approval required at this stage of the Workflow?

If a Manager User, who typically does not have the ability to edit requests needs to approve or reject activity recorded against a request, the Workflow needs to include an Approval State. Alternatively, if work on a Request needs to be approved by a Customer or Line Manager, then an Approval State is also required.

An Approval State must be neither an Entry nor Exit Point, and when the Approval State option is set to Yes, the Supervisor User must configure the Next States that a request can move to, when accepted or rejected by the Manager, Customer or Line Manager.

After the Accept State is selected, the system provides the option to define the type of Approval State, which includes the option for Customers, Line Managers and one or more Managers to be canvassed for Approval:

Approval

Customer	Select if the request is to be assigned to the Customer associated with the request to accept/reject request activity. The Customer will be able to access the accept/reject icons in the Customer Portal to process the request.
Line Manager	Select if the request is to be forwarded to a system user with the Customer Role, who will process the approval in relation to the Customer associated with the request. The Customer/Line Manager will be able to access the accept/reject icons in the Customer Portal to process the request.
Team Manager	Select if a single Manager User assigned to the Team is to process the Request.
Team Managers#	Select if a set the number of Managers are required to Approve the Request before the system automatically applies the defined Accept or Reject State.
Team Managers%	Select if a set percentage weighting must be achieved by multiple Managers voting, before the system automatically applies the defined Accept or Reject State. When selected, define the percentage weighting.

Select Team Manager for States that only require one Manager to approve the Request. If multiple Managers or a percentage of Managers in a group need to approve a Request, the number of Approvals or percentage weighting needs to be configured for the Request to be moved to the defined Accept State.

The image shows a configuration form with the following fields and values:

- Accept State** (Section Header)
- Status**: On Hold
- Approval**: Team Manager
- Reject State** (Section Header)

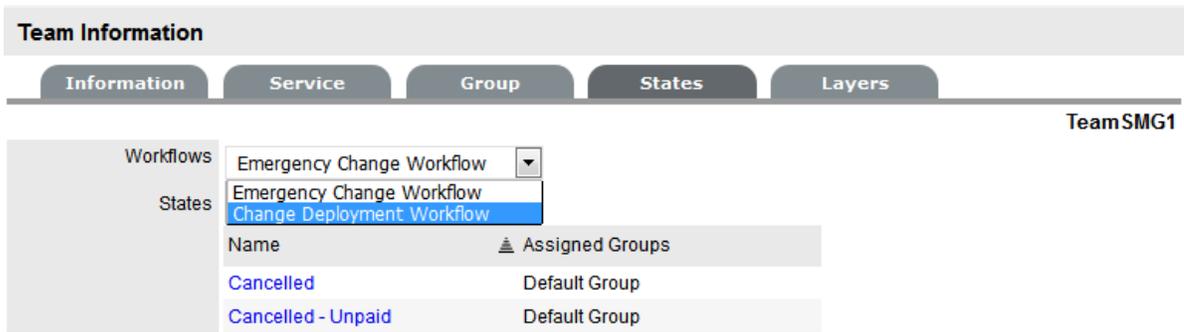
The 'Reject State' dropdown menu is open, showing the following options:

- Customer
- Line Manager
- Team Manager (highlighted)
- Team Managers #
- Team Managers %

This configuration allows the Customer or Manager to simply reply yes or no to email they receive for approving a request. Alternatively, they can log into the system, add a Note and mark the request as approved or rejected and upon doing so, the system will automatically assign the next relevant state, as dictated by the Workflow.

It should be noted, for Line Manager Approval States to be displayed as a Workflow State Next Action option in the Request Summary screen, the system will automatically check that the Customer associated with the Request has a Line Manager defined in their Customer Information screen.

Tip: After building a Service Request or Change Workflow with a Team Manager Approval State, ensure the appropriate Managers are assigned to a Manager Group within the Team>Groups tab, and this Manager Group is assigned to the relevant State within the Change Workflow of the User>Teams>Team Name>States tab.

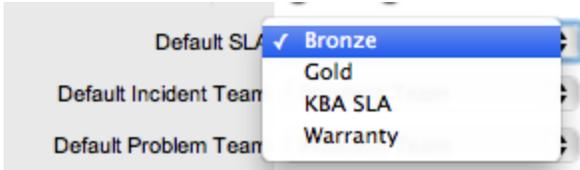


Workflows Applied

The final piece of the Workflow puzzle is to ensure that the correct Workflow is available when a request is created. To achieve this, in addition to assigning the request to the appropriate Team, the following configuration needs to be completed:

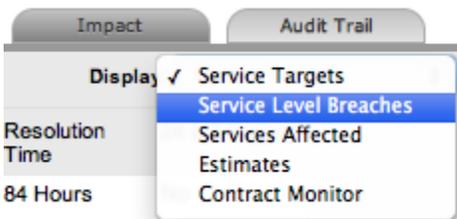
1. Assign the relevant SLA to the required Workflow, within the Workflows tab of the SLA Editor information screen
2. Assign the required Workflow to the relevant Team, within the User>Teams>Team Name>States tab
3. Ensure the relevant SLA is applied to either the Item, Customer or Organizational Unit assigned to the request.

NOTE: Note: Failure to assign an SLA results in the system default settings being applied, which are configured in the administration console within the Setup>Privileges>Requests tab.



Breach Codes

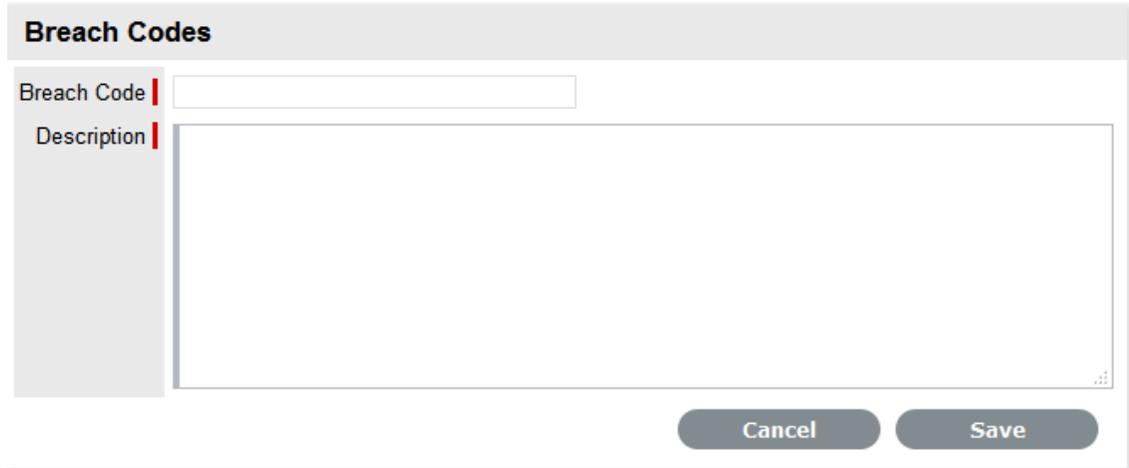
An SLA breach occurs when a User fails to meet service level targets. When a breach occurs, the User assigned to the request receives an Alert, prompting them to explain the cause of the breach. The User is given the option to select a breach code and provide an explanation for the breach within the Service Level Breach filter view of the Impact tab of the breached request.



Breach codes are defined by a Supervisor User within the Service > Breach Codes tab.

To create a breach code:

1. Go to Service> Breach Codes
2. Select New



Breach Codes

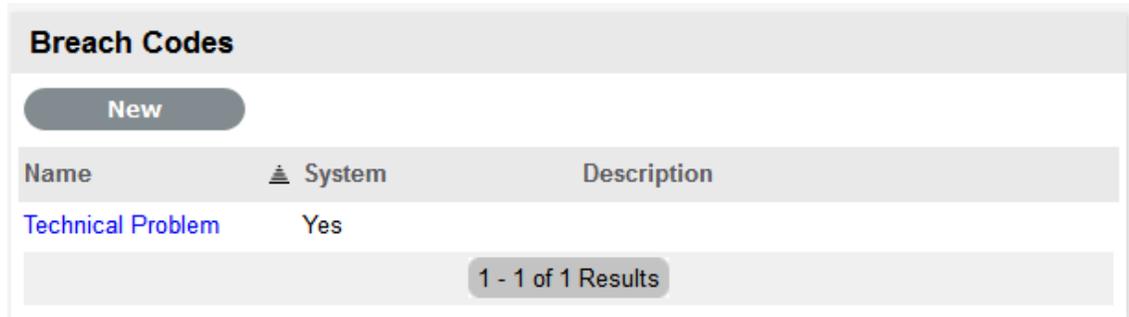
Breach Code |

Description |

Cancel Save

3. Enter a Breach Code label
4. Enter a Description of the breach
5. Click Save.

The System column in the List View includes Yes to indicate a Code that can be edited.



Breach Codes

New

Name	System	Description
Technical Problem	Yes	

1 - 1 of 1 Results

Assigning an SLA

Within the system a Service Level Agreement (SLA) can be assigned to a Customer, Organizational Unit, Item or a request. When a request is created, the system checks if any of these elements have an SLA. The business logic applied to assign an SLA to a request is as follows:

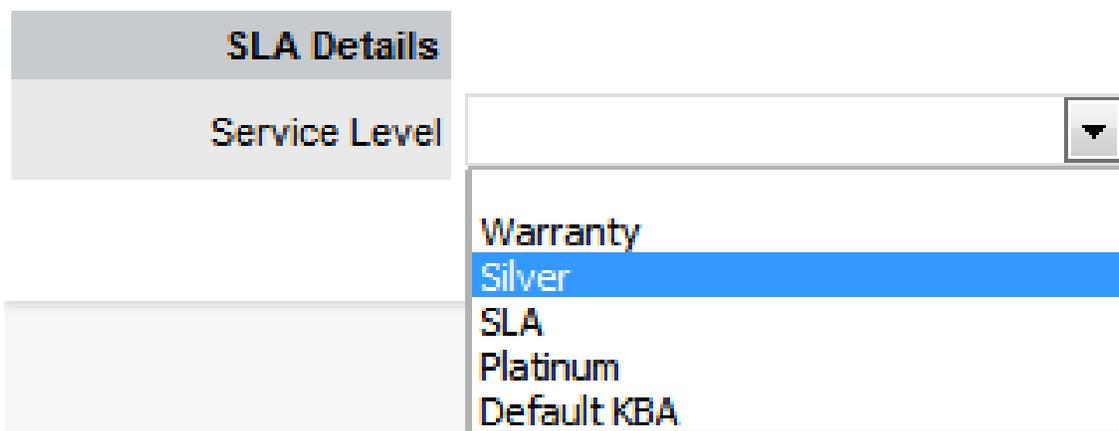
1. If the Customer has an SLA then assign this to the request
2. If the Customer does not have an SLA but the Organizational Unit does, assign this to the request
3. If the Customer or Organizational Unit does not have an SLA but the Item does, then assign this to the request
4. If none of the above elements have an SLA, the system Default SLA as defined by Admin in Setup>Privileges>Requests tab, is assigned to the request.

When Billing is enabled, the system checks that a maintenance contract is in place during the request creation process and assigns a Status of Pending - No Contract when an SLA contract is non-existent or expired. To assign an SLA in this situation, the Technician creates a Per Item or Per Request SLA Contract within the Contract tab of the request Information screen.

Assigning an SLA to a Customer

To assign an SLA to a Customer when Contracts are disabled:

1. Select User>Customers
2. Select the required Customer name link
The Customer Information screen opens.
3. Move to the Contracts tab
4. Click Edit
5. In SLA Details, use the drop-down menu to select the SLA for this Customer



6. Click Save.

Assigning an SLA to an Organizational Unit

To assign an SLA to an Organizational Unit when Contracts are disabled:

1. User>Organizational Units
2. Select the required Org Unit Name
The Org Unit Information screen will open.
3. Select the Contracts tab
4. Click Edit
5. In SLA Details, using the drop-down menu, select the SLA for this Customer

Org. Unit Information

Details Customers Technicians Departments Items Requests Contracts

Micro Focus

SLA Details

Service Level

- Warranty
- Silver
- SLA
- Platinum
- Default KBA

Cancel Save

6. Select Save.

Assigning an SLA to an Item

To assign an SLA to an Item when Contracts are disabled:

1. Select Configuration>Items
2. Select the required Item number hyperlink
The Item Information screen will open.
3. Select the Costs tab
4. Click Edit
5. In SLA Details, using the drop-down menu, select the SLA for this Item

Item Information

Information Details Costs Requests Relationships

Duplicate Print

Item # 100004 (Server)

Financial

Cost 0.00

Monthly Cost 0.00

Purchase Date 07/31/10 12:30

Depreciate Over years

Depreciated Value \$0.00

Audit Date (mm/dd/yy)

PO Number

Inherited Costs

Inherited Capital

Inherited Ongoing

Delegate Costs Yes No

SLA Details

Service Level

- Warranty
- Bronze

Warranty

Expires

Availability

Avg Repair Time N/A

Avg Time To Fail N/A

Delete Cancel Save

6. Select Save.

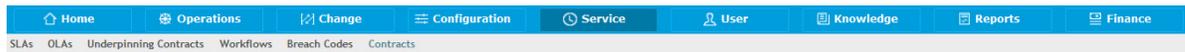
Assigning an SLA to a Request - Only when Billing is enabled

When a request is created without a valid contract, the system assigns the request a Pending - No Contract Status. The request is locked and cannot be edited by a Technician until a valid Contract is in place.

2.7.4 Contracts

- ♦ “Contracts” on page 677
- ♦ “Contract Assignment” on page 680
- ♦ “Pending Contracts” on page 690

Contracts



(Contracts menu option is available when Enable Contracts is set to Yes in Admin>Setup>Billing>Setup.)

Contracts within the system allow service and support organizations to manage their Customer support subscriptions relative to the type of service they provide.

For Customer requests to be addressed, all requests must be associated with a valid contract. A Contract consists of a Service Level Agreement (SLA) and a Service Delivery Period (start and end date). A Service Delivery Period is the duration of the contract, such as a month or a year. In the case of individual request Contracts, the Service Delivery Period terminates when the request is closed.

Contracts can be used as a stand-alone function or with the Invoices facility. Service Desks that charge Customers for the service and support they provide, can enable the Contracts and Invoices functionality. Invoice creation within the system is on a per Contract basis.

Contract Types

The Contract Types available within the system include:

- ♦ Per Request - covers the period of time for which the request is open and worked undertaken
- ♦ Per Item, Customer or Org. Unit - covers the Item, Customer or Org.Unit regardless of the number of requests logged against the Item or by the Customer or Org. Unit but can be created on the following basis:

IMPORTANT: Subscription - a contract that covers a specified period of time

Time Limited Subscription - a contract that covers either a specified period of time or number of support hours, whichever limit is reached first

Support Hours - a contract that defines the number of support hours covered

- ♦ Support Hours by Month - a contract that covers a total number of support hours purchased for a defined timeframe and allocated on a per month basis.

Contracts Option

Users must also be assigned the Service Level Management Process within their User account, in order to view the Service Level tab. The Contracts option within the Service tab is visible when Billing>Contracts is enabled by the Administrator. A list of all Contracts generated in the system is listed here and can be viewed through a selection of Filter options.



The following filter list views are provided:

Contracts Filter Views	Description
Active Customer Contracts	Displays a list of all valid contracts for Customers.
Active Item Contracts	Lists all valid Item Contracts.
Active Organization Unit Contracts	Displays all valid Organizational Unit Contracts.
All Agreements	Lists all Contracts in the system regardless of status.
All Customer Contracts	Lists all Customer Contracts in the system regardless of status.
All Item Contracts	Displays all Item Contracts in the system regardless of status.
All Organizational Units	Lists all Organizational Unit Contracts in the system regardless of status.
All Pending Contracts	Displays all Contracts with a Pending Status that are waiting to be processed.
Request Contracts	Lists all Contracts created on a Per Request basis.

Contract Creation

The Contracts option within the Service tab only provides the list view of Contracts generated in the system. Contracts are created in any of the following screens:

- ◆ Item >Costs >Contracts tab
- ◆ Customer>Contacts tab
- ◆ Organizational Unit >Contracts tab
- ◆ Finance>Invoices tab
- ◆ Request >Contract tab for requests with a Pending - No Contract status.

Contract Fields

Contract Information

Edit

Contract # 18

Details

Contract Type Per Item
 Item Email Service ([Email Services](#))
 Start Date 01/13/16 10:12
 End Date 01/13/17 23:59
 Expires 12 Months 1 Day
 SLA SLA
 Invoice # [100041](#)

Ownership

Customer Jason Blackett

Attachment

Audit

File Description	Size	Date
0 - 0 of 0 Results		

Done

A Contract in the system includes the following fields in the Contract Information screen:

Contract Details	Description
Contract Type	Subscription or a contract that just covers the current request.
Item, Customer or Org. Unit	For Subscription contracts, this is the Item, Customer or Org. Unit covered by the Contract. For Per Incident contracts this is replaced by a request ID number.
Start and End Date	Subscription Contracts default to a one year contract but can be amended.
Expires	The number of days until the Contract expires.
Hours Purchased	The number of hours purchased for a Time Limited Subscription or Support Hours Contract.
Time Remaining	The amount of time remaining for the Time Limited Subscription or Support Hours Contract.
SLA	The SLA applied to the Contract.
Invoice #	The Invoice number used to create the Contract. (This is displayed when Invoices are enabled in the system.)
Ownership	
Customer	The Customer covered by the Contract.

Attachment Tab

The Attachment tab allows the User to upload documentation related to the Contract. This facility provides a centralized repository for storing information and obligation details related to the Contract.

Audit Tab

The list of requests with the time recorded against the Contract is displayed within the Audit tab. The Summary view displays the list of requests with total number of Notes and Time allocated to the Contract, while the Detail view includes a breakdown of all Notes and the associated time related to each request.

Contract Validation Process

When a request is created and Contracts are enabled, the system validates the contract status for the Customer, Organizational Unit or Item. As part of the contract validation process, the system selects the first element found on this list:

1. Customer (with a valid contract)
2. Org Unit (with a valid contract)
3. Item (with a valid contract)
4. No contract found, then either a Per Request or Per Item Contract can be created by selecting the Pending - No Contract hyperlink and adding a Per Request or Per Item Contract.

Contract Assignment

Contracts can be assigned to an Item, Customer, Organizational Unit or on a per Incident basis. The following content regarding creating a Contract, assumes that within the system Setup, the Billing>Contracts option is enabled.

When a request is created, the system will check if the Customer has a valid contract. If the Customer is not under contract, the system will check if the Org. Unit is covered, and if not, it will assess the Item contract status. If no contract is in place, the request will be assigned a "Pending - No Contract" Status and locked down until a Contract is created.

An Item, Customer and Organizational Unit can only have one active contract in place at a time but multiple contracts can be queued by assigning a Start Date that falls after an existing Contract's end date. Queued Contracts are visible within the Item, Customer or Org Unit's Contract tab identified by the contract number generated at the point of creation, if Invoicing is not enabled in the system. If Invoicing is enabled in the system and an SLA cost is associated with the contract, a contract number is generated when the invoice payment is processed by a Finance User.

Customer Contracts

Customer contract history is stored within the Contracts tab of the Customer Information screen. All contracts, valid and expired, are listed within the Customer and Items tab of the Contracts screen.

To create a new contract for a Customer:

1. Select User>Customers
2. Select the Customer Name
3. Move to the Contracts tab
4. Click Edit

The Add and Delete buttons become available with the Contracts>Customer tab.

Customer Information

Contact Aliases Items **Contracts**

Edit Michael Angelo

SLA Details

Service Level

Contract # No Contract Assigned

Customers Items

Contract # Type SLA Start Date End Date

0 - 0 of 0 Results

Done

5. Click Add

(If Invoices are enabled in the system, an Invoice number will be automatically generated and assigned to the Contract).

6. Select a Service Level from the list

When selected, the screen expands to display start and end date fields.

Customer Information

Contact Aliases Items **Contracts**

Contract

Service Level Warranty

Priority	Response Time	Restoration Time	Resolution Time	24 x 7 support	Alert
Urgent	6 Hours	12 Hours	24 Hours	Yes	None
High	12 Hours	24 Hours	48 Hours	Yes	None
Medium	18 Hours	36 Hours	72 Hours	Yes	None
Low	24 Hours	48 Hours	96 Hours	Yes	None

Contract Type Per Customer

Time Subscription

Start Date

End Date

Subscription
Time Limited Subscription
Support Hours
Support Hours By Month

Cancel Save

7. Define the Contract Time period

For the Per Customer Contract Type the Time Period for the Contract can be defined as one of the following:

Subscription if selected, the Start and End Dates are automatically set to year from the date of creation, but can be edited if required.

Time Limited Subscription if selected, the Support Hours field is displayed and the number of support hours purchased by the Customer should be entered. Also, the Start Date and End Date fields should be completed manually by entering the length of time for the subscription period, or the system will default to entering a year from the date of creation.

Support Hours if selected, the number of support hours purchased by the Customers should be entered.

Support Hours by Month if selected, set the number of hours purchased per month and define which day of the month contract is to rollover to start the new month. The Total Support Hours will automatically be calculated based on the Start and End Dates set for the Contract.

(If a Contract is forward dated with a Start Date set in the future, the Pending Contract status is assigned.

8. Add any relevant Invoice Notes
9. Check the Taxable box, if the Contract is to be taxed
10. Click Save

If invoices are enabled and a cost is associated with the SLA, a Warning message is displayed prompting that the invoice needs to be processed by a Finance User before the contract will become available in the system. The invoice can be processed in the Finance >Invoices tab.

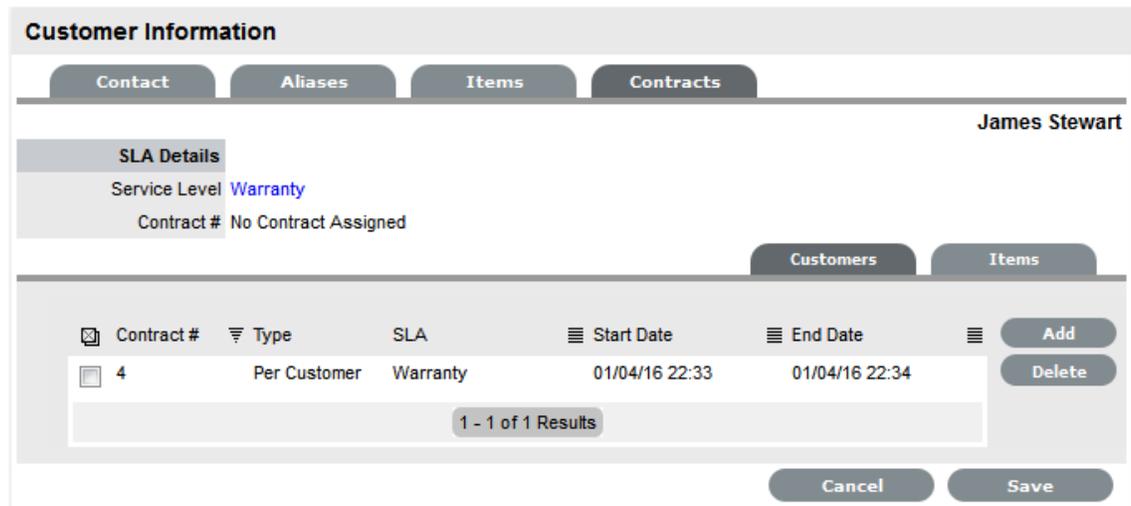


Warning

The invoice has been generated against this customer with status "Pending Unpaid". Technicians will not be able to work with this customer until the invoice has been paid.

11. Click Next to continue

The system reverts to the Contracts summary screen



Customer Information

Contact Aliases Items **Contracts**

James Stewart

SLA Details

Service Level [Warranty](#)

Contract # No Contract Assigned

Customers Items

Contract #	Type	SLA	Start Date	End Date	
4	Per Customer	Warranty	01/04/16 22:33	01/04/16 22:34	Add Delete

1 - 1 of 1 Results

[Cancel](#) [Save](#)

12. Click Save. Click Done.

The screenshot shows the 'Customer Information' screen for James Stewart. It has tabs for Contact, Aliases, Items, and Contracts. The 'Contracts' tab is active, showing an 'Edit' button and the name 'James Stewart'. Below this is the 'SLA Details' section with the following information:

- Service Level: Warranty
- Contract #: 4
- Contract Type: Subscription
- Start Date: 01/04/16
- End Date: 01/05/17
- Expires: 1 Year 1 Day

Below the details is a table with columns for Contract #, Type, SLA, Start Date, and End Date. The table contains one row:

Contract #	Type	SLA	Start Date	End Date
4	Per Customer	Warranty	01/04/16 22:33	01/05/17 10:29

Below the table is a '1 - 1 of 1 Results' indicator and a 'Done' button.

NOTE: If Invoices are enabled, a new invoice is automatically saved within the Finance>Invoices screen for the newly created Contract. If payment is required, a Pending Invoice Number is displayed and once processed, the Contract details will be included in the Customer Information>Contracts>Customer tab.

The Items tab within the Customer>Contracts screen is used to list all the Items with a Contract that are owned by a Customer.

To delete a current Contract, as a Supervisor User, select next to the Contract Number. Alternatively, to delete a current or queued Contract, within the Contract>Customers tab check the field next to the relevant Contract # and select the Delete button.

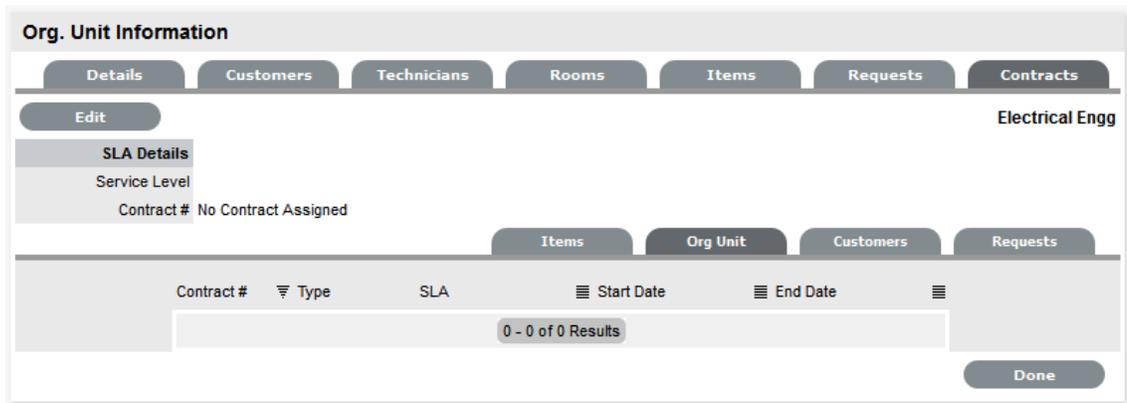
Organizational Units Contracts

Organizational Units' Contract history is stored within the Contracts tab of the Org. Unit Information screen. All Contracts, valid and expired, are listed within the Org. Unit, Customer and Items tab of the Contracts tab.

NOTE: To assign a Contract to an Org Unit, a Primary Contact must be nominated for the Org Unit or the system will prompt the User to assign a Primary Contact during the Contract assignment process. This means, prior to creating the Contract assign at least one Customer to the Org Unit and then designate a Customer as the [Primary Contact](#).

To create a new Contract for an Organizational Unit:

1. Select User> Organizational Units
2. Select the Organizational Unit's Name
3. Move to the Contracts tab



4. Click Edit

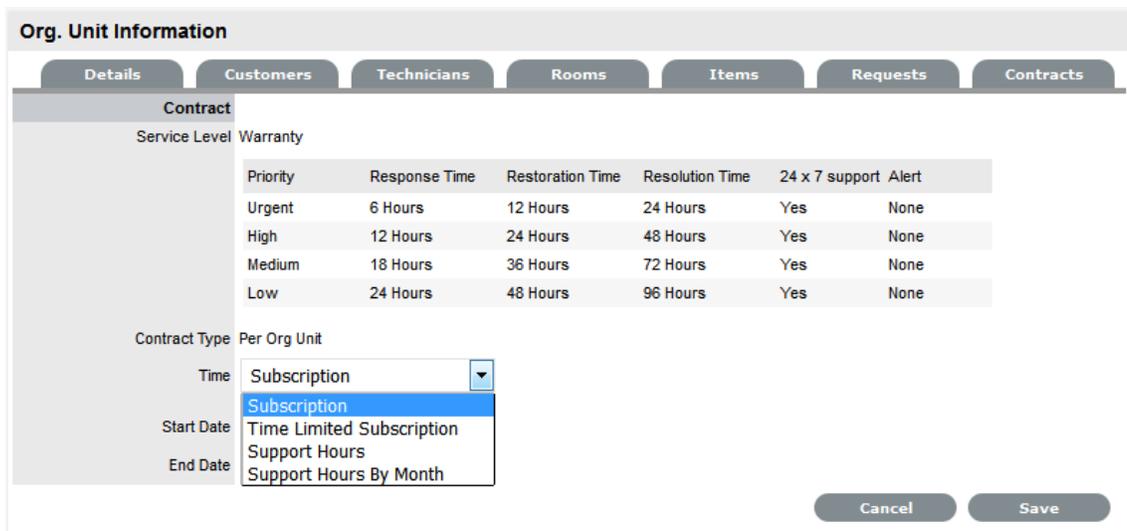
The Add and Delete buttons become available with the Contracts>Org Unit tab.

5. Click Add

If a Primary Contact has not been assigned to the Org Unit a system prompt will notify the User to create a Primary Contact.

6. Select a Service Level from the list

When selected, the screen expands to display start and end date fields.



7. For the Per Org Unit Contract Type the Time Period for the Contract can be defined as one of the following:

Subscription if selected, the Start and End Dates are automatically set to year from the date of creation, but can be edited if required.

Time Limited Subscription if selected, the Support Hours field is displayed and the number of support hours purchased by the Customer should be entered. Also, the Start Date and End Date fields should be completed manually by entering the length of time for the subscription period, or the system will default to entering a year from the date of creation.

Support Hours if selected, the number of support hours purchased by the Customers should be entered.

Support Hours by Month if selected, set the number of hours purchased per month and define which day of the month contract is to rollover to start the new month. The Total Support Hours will automatically be calculated based on the Start and End Dates set for the Contract.

(If a Contract is forward dated with a Start Date set in the future, the Pending Contract status is assigned.

8. Click Save
9. Click Next to continue

The system reverts to the Contracts summary screen, if the contract is forward dated and another contract is not already active, the Enable Contract option button will be available. Select this button if the contract is to commence prior to the set Start Date. Alternatively, other contracts can be queued for the Org Unit by selecting the Add button.

The screenshot shows the 'Org. Unit Information' screen for 'Accounts Dept'. The 'SLA Details' section shows 'Service Level: Warranty', 'Contract #: No Contract Assigned', and 'Pending Contract #: 5' with an 'Enable Contract' button. Below is a table of contracts:

Contract #	Type	SLA	Start Date	End Date
5	Per Org Unit	Warranty	02/02/17 12:10	03/02/18 23:59
1	Per Org Unit	Warranty	01/05/16 11:53	01/05/16 12:11

Buttons for 'Add', 'Delete', 'Cancel', and 'Save' are visible.

10. Click Save
- To process the contract before the set Start Date select the Enable button.

The screenshot shows the 'Org. Unit Information' screen after clicking 'Enable Contract'. The 'SLA Details' section now shows 'Pending Contract #: 5' with an 'Enable Contract' button. The table of contracts is the same as in the previous screenshot. A 'Done' button is now visible at the bottom right.

11. Click Done.
- A success message is displayed.



Information

New contract is enabled for this Org. Unit.

Org. Unit Information

Details Customers Technicians Rooms Items Requests Contracts

Edit Accounts Dept

SLA Details

Service Level [Warranty](#)

Contract # 5

Contract Type Subscription

Start Date 01/05/16

End Date 03/02/18

Expires 2 Years 1 Month 27 Days

Items Org Unit Customers Requests Audit

Contract #	Type	SLA	Start Date	End Date
5	Per Org Unit	Warranty	01/05/16 12:12	03/02/18 23:59
1	Per Org Unit	Warranty	01/05/16 11:53	01/05/16 12:11

1 - 2 of 2 Results

Done

NOTE: If Invoices are enabled, a new invoice is automatically saved within the Finance>Invoices screen for the newly created Contract. If payment is required, a Pending Invoice Number is displayed and once processed, the Contract will be listed in the Org.Unit Information>Contracts>Org.Unit tab.

To delete a current Contract, as a Supervisor User, select next to the Contract Number. Alternatively, to delete a current or queued Contract, within the Contract>Org Unit tab check the field next to the relevant Contract # and select the Delete button.

The Items and Customers tab within the Org Unit>Contracts screen is used to list all the Items and Customers with a Contract that belong to the selected Org Unit.

Item Contracts

1. Select the Item Number within the Configuration>Item screen
2. Move to the Costs tab
 - The Contracts tab is visible in the bottom right corner of the screen
3. Click Edit

The Add and Delete buttons are made available within the Contracts tab

Contracts

Contract #	Type	SLA	Start Date	End Date
0 - 0 of 0 Results				

Add Delete

Delete Cancel Save

4. Click Add

(If Invoices are enabled in the system, an Invoice number will be automatically generated and assigned to the Contract).

5. Select an SLA from the drop-down option

The screen will display the SLA details and the Contract Type locked to Per Item.

Priority	Response Time	Restoration Time	Resolution Time	24 x 7 support	Alert
Urgent	6 Hours	12 Hours	24 Hours	Yes	None
High	12 Hours	24 Hours	48 Hours	Yes	None
Medium	18 Hours	36 Hours	72 Hours	Yes	None
Low	24 Hours	48 Hours	96 Hours	Yes	None

6. Assign the Time period to be covered by the Contract:

If *Subscription* is selected, the Start and End Dates are automatically completed by the system, but can be edited if required.

If *Time Limited Subscription* is selected, the Support Hours field is displayed and the number of support hours purchased by the Customer should be entered. Also, the Start Date and End Date fields should be completed manually, entering the length of time for the subscription period.

If *Support Hours* is selected, the number of support hours purchased by the Customers should be entered.

If *Support Hours by Month* is selected, set the number of hours purchased per month and define which day of the month contract is to rollover to start the new month. The Total Support Hours will automatically be calculated based on the Start and End Dates set for the Contract.

(If a Contract is forward dated with a Start Date set in the future, the Pending Contract status is assigned.

7. Add any relevant Invoice Notes
8. Check the Taxable box, if the Contract is to be taxed
9. Click Save.

If Invoices are enabled in the system, an Invoice number will be automatically generated for the Contract and made available within Finance>Invoices. Payment will need to be processed by a Finance User before the Contract can be enabled in the system. If invoice payment is required before the contract can be enabled in the system the following Warning message is displayed:

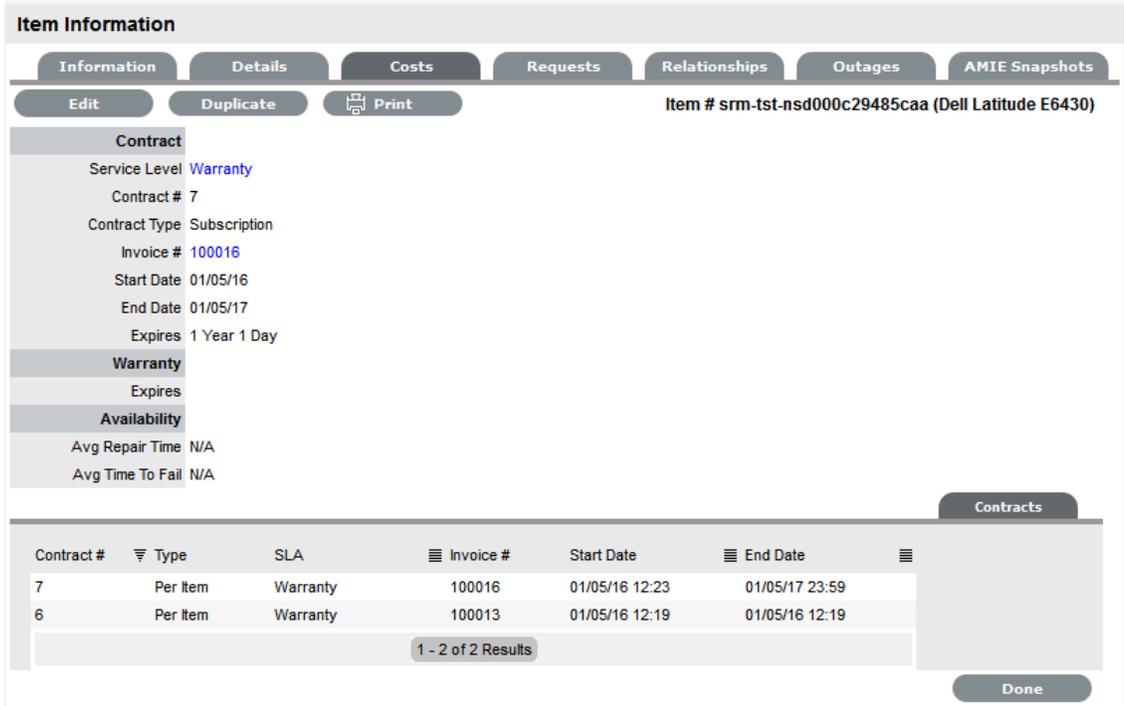


Warning

The invoice has been generated against this item with status "Pending Unpaid". Technicians will not be able to work with this item until the invoice has been paid.

10. Click Next

The Contracts information is only populated after the Invoice has been processed. To process the invoice, as a Finance User move to the Finance>Invoices tab. Once the relevant invoice payment has been processed the Contract details will be visible in the Costs >Contracts tab.



Item Information

Information Details **Costs** Requests Relationships Outages AMIE Snapshots

Edit Duplicate Print Item # srm-tst-nsd000c29485caa (Dell Latitude E6430)

Contract

Service Level Warranty

Contract # 7

Contract Type Subscription

Invoice # 100016

Start Date 01/05/16

End Date 01/05/17

Expires 1 Year 1 Day

Warranty

Expires

Availability

Avg Repair Time N/A

Avg Time To Fail N/A

Contracts

Contract #	Type	SLA	Invoice #	Start Date	End Date
7	Per Item	Warranty	100016	01/05/16 12:23	01/05/17 23:59
6	Per Item	Warranty	100013	01/05/16 12:19	01/05/16 12:19

1 - 2 of 2 Results

Done

The Costs tab provides a summary of the current Contract details. The Contracts tab within the Costs screen, lists all contracts that have been assigned to this Item.

To delete a current Contract, as a Supervisor User, select  next to the Contract Number. Alternatively, to delete a current or queued Contract, within the Costs>Contract tab check the field next to the relevant Contract # and select the Delete button.

Per Request Contracts

When a request is created without a valid contract, the system automatically assigns the request a status of Pending - No Contract. The User can associate a contract to either the Item or request within the Contract tab of the request Information screen. A Request Contract is only valid for the life of the request.

Contracts with Invoices Enabled

When the Invoices option is enabled within the application's setup and a Contract is being created, the system automatically generates a Contract Invoice. For the contract to become active in the system, a Finance User must process the invoice. If no cost is assigned to the Service Level (i.e., Warranty), the invoice is automatically processed and the contract is active in the system.

Canceling Contracts

If a Contract is no longer valid, it can be cancelled at any time during the contract period. A Supervisor can cancel the Contract within the Customer, Org, Unit or Item Contracts screen, by selecting  next to the Contract Number. Contracts that are canceled using this option will record the Reason for cancellation as the Supervisor User name who triggered the cancel action.

A User with the *Finance Role* can delete a Contract within the list view of the Service>Contracts tab.

To cancel a Contract, as a User with the Finance Role:

1. Go to Service > Contracts
2. Select a Contract ID to be canceled

The Contract Information screen will appear.



Details	
Contract Type	Per Org Unit
Org Unit	ICT Dept
Start Date	05/07/12 14:06
End Date	06/07/12 23:59
Expires	1 Month 1 Day
SLA	Bronze
Invoice #	100015
Cancel Contract	

Ownership
Customer: Laura Morris

3. Click the Cancel Contract hyperlink
A Cancel Reason text box is displayed.
4. Enter an explanation for canceling the Contract



Cancel Reason

5. Click Save

The Cancel Reason is assigned to the Contract and the Contract Expiry date will be marked Expired.

6. Click Done.

NOTE: When a Customer Contract is cancelled and the Customer's associated Org Unit has an active contract in place, the Org Unit Contract details will be displayed within the Contracts>Service Level field of the Customer Information screen.

Pending Contracts

Contracts that have been forward dated on creation or that require invoice payment before they can become active in the system, are recorded as Pending Contracts. The list of Pending Contracts can be viewed in the All Agreements filter within the Service Level > Contracts screen.

A Pending Contract will automatically become active in the system on the start date assigned to the contract, if an invoice is not associated with the contract.

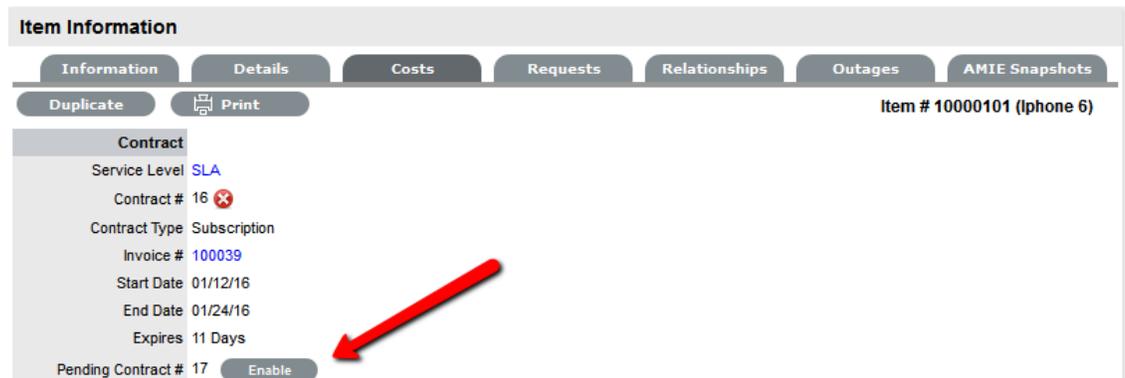
To enable a Contract before the start date:

1. Go to the Costs tab of the Item or Contracts tab of the Org Unit or Customer

The tab is available relative to where the contract is being activated. It will be Costs within the Item screen, or Contracts within the Customer or Org Unit Information screen.

2. Select Edit

The Enable button is displayed next to the Pending Contract Field



3. Click Enable

The system prompts that the start date will be updated.

4. Click OK

The Contract is created with the new start date.

Contract	
Service Level	Warranty
Contract #	7 
Contract Type	Subscription
Invoice #	100016
Start Date	01/05/16
End Date	01/05/17
Expires	1 Year 0 Day

5. Click Save.

NOTE: Requests raised against a Customer/Org Unit/Item with a Pending Contract, are assigned a Pending-No Contracts status. The Item/Customer/Org Unit's Contract needs to be activated before a Technician can work on the request.

2.8 User

- ◆ [Section 2.8.1, "Customers," on page 692](#)
- ◆ [Section 2.8.2, "Organizational Units," on page 701](#)
- ◆ [Section 2.8.3, "Partner Organizations," on page 713](#)
- ◆ [Section 2.8.4, "Users," on page 717](#)
- ◆ [Section 2.8.5, "Teams," on page 730](#)
- ◆ [Section 2.8.6, "Assignments," on page 756](#)

The User tab is used to create, modify and view accounts for:



- ◆ Customers
- ◆ Organizational Units
- ◆ Users
- ◆ Teams.

Users within the service management system can have one of the following Roles:

- ◆ Technician
- ◆ Supervisor
- ◆ Partner.

and one or more of:

- ◆ Administrator
- ◆ Finance
- ◆ Manager
- ◆ Customer.

If a User is assigned multiple Roles, the User Roles of Supervisor or Technician, Finance and Manager are consolidated within one User view. Therefore, if a User is assigned Finance, Manager and Supervisor/Technician access, they can view all functionality related to these Roles within the User view. If the User is also assigned Admin and Customer access, next to their login name, the options of Setup and Customer will be displayed.

The Supervisor can create User accounts within the User >Users tab.

The system Administrator can synchronize the system with a Directory Server to import Customer and User details. Imported Users can only be modified through the appropriate server console, not via the application. For further details about this topic refer to the Authorization section within the Administrator Guide.

Alternatively, the Administrator can also import Customers via a .CSV file.

2.8.1 Customers

The Customers tab is used to create, modify and delete Customer Accounts.

A Customer is a User assigned the [Customer Role](#). They can be internal or external to the organization and can raise Incidents through the Customer Portal or via email. Service Desk staff can also generate requests on behalf of the Customer.

Service Desk Customers can be created within this tab. The Administrator can also import Customers from a .CSV file, or synchronize the system with a directory server.

NOTE: If Customers are imported using a directory server, the option to create Customers from the Users tab is disabled.

Creating a Customer Account

Customer Information includes the following tabs:

- ◆ Information
- ◆ Aliases
- ◆ Items
- ◆ Requests
- ◆ Contracts.

Information Tab

This tab is used to enter contact information about a Customer, creating a new Customer account.

NOTE: If Custom Fields are to be created for Customer Information, it is recommended the Administrator complete the customization prior to creating Users. (See Administrator: Custom Fields.)

To create a Customer account using Internal Authentication:

1. Select User>Customers
2. Select New

3. The Customer Information screen appears with the following fields:

Customer Information Fields

Access

Title If enabled, select the appropriate title from the drop-down options. (This field is displayed if the Enable Titles option is set to Yes in the Admin>Setup>Setup>Privileges>Customer tab.)

First Name* Customer's First Name.

Last Name* Customer's Last Name.

User Name* The login User name credentials for the User. If this is imported via LDAP or Active Directory, it can not be edited. Otherwise, enter a Username. Note that the value must be unique.

Password/ Confirm Password The Default Password is set to the Customer's email address or a random string can be enabled by the Administrator in Setup>Privileges>System.

Customers can reset their password from the Customer Portal, or a Service Desk User can reset it in the customer account details using the Reset Password button through the Customer>Information tab.

Web Access Web Access allows Customers to view their account information and Incidents via the Customer Portal.

Contact

Primary Email* The Customer's Email address. System messages are sent to this address.

Send To This field becomes when alternate email addresses are entered on the Aliases tab.

Select the most appropriate email address to be set as the default address applied to Customer correspondence. When the Send To field is set to an alias address, the Primary Email address is not included in the cc list, unless specified in the request Information tab cc list.

Org. Unit The Organizational Unit, be it a Company or Department with which the Customer is associated.

(Organizational Units are created by the Supervisor, in Users >Organizational Units.)

Line Manager If relevant, assign a system user with the Customer Role who can approve/reject requests made by this Customer, as part of the Change Management or Service Request approval process. (This information can not be edited if the line manager details are set by the LDAP synch.)

Customer Information Fields

Room	This field is visible if the Display Rooms option is set to Yes in the Setup>Privileges>Customer screen and there are Room details configured in Organizational Units.
Address 1	First line of Customer's address.
Address 2	Second line of Customer's address.
City	Customer's city details
State	Customer's State details. Options will be displayed for the State, once the Country is selected, if Regions are configured for the Country in the system.
Zip/Postcode	Customer's area code.
Country	Customer's country. The country selected will determine the time zone and state options for the Customer.
Email Locale	Set the default language for email correspondence.
Phone	Enter Phone details.
Fax	Enter the Customer's fax number, if relevant.
Pager	Enter the Customer's pager details, if relevant.
Mobile	<p>A mobile number can be entered as a contact number or for use with SMS (Short Mail Service message). An SMS can be sent to notify the assigned Technician when a request is created.</p> <p>SMS Messaging options:</p> <ol style="list-style-type: none">1. From the drop-down list, select the SMS Service Provider.2. Override SMS Address. If your service provider does not appear in the list, click this checkbox and enter an alternate Service Provider.
SMS Override	Enter SMS Gateway override details for the Customer, if a number other than the one entered in the Mobile field is to be used to send/receive updates via SMS. Enter the complete SMS details in email address format, i.e., 000777891@smsgateway.provider.com.
Partner	
Customer of	<p>Nominate the Partner Organization associate with the Customer. This is an external service provider who manages the Customer's request.</p> <p>(The option is enabled by the Administrator in Setup Privileges> Use >Edit Customer Partner. The Partner Organizations are defined by the Supervisor in the User>Partner Organizations tab.)</p>

Customer Information Fields

Locale	
Time zone	The Customer automatically adopts the default Timezone set for the system. However, the Timezone can be manually adjusted here for the specific Customer.
Last Login	Auto-populated with the date the Customer last logged into the system.
Host	The IP address of the last login for the Customer
GPS	The GPS coordinates of the last known address for the Customer. (This field is displayed when the Record GPS option is enabled in Admin>Setup>Setup>Privileges>Customer tab.)
Roles	
Current*	Multiple Roles can be assigned to a User. Select other Roles the Customer will use, by ticking the check boxes. Note: If the Technician Role is selected, a Supervisor must be allocated.
Default Portal	The Default Portal is the user interface a Customer, who is assigned multiple Roles, accesses by default when they log into the system. NOTE: If the Users Default Portal is set to Customer, the User details will not be accessible in the Users list, but included in the list within the User>Customer tab.
Details	
Notes	Click on the field to enter any Customer relevant information.

* Denotes mandatory fields

1. Click Done.

Emailing Customers Credentials



To email a newly created Customer details regarding their system log in details, click the Email button within the Customer Information screen. If Random Passwords is enabled, selecting Email will reset the Password and forward the details to the Customer. If Password Questions is enabled in Setup>Privileges>System, selecting Email will send a link to the Customer directing them to a page that includes the security questions set for their account and reset the password based on the answers provided. Customers must complete this process within an hour of the email being sent.

vCard Button



Select this option to download and open the Customer's information in an electronic business card format, to email or save outside the system.

Aliases Tab

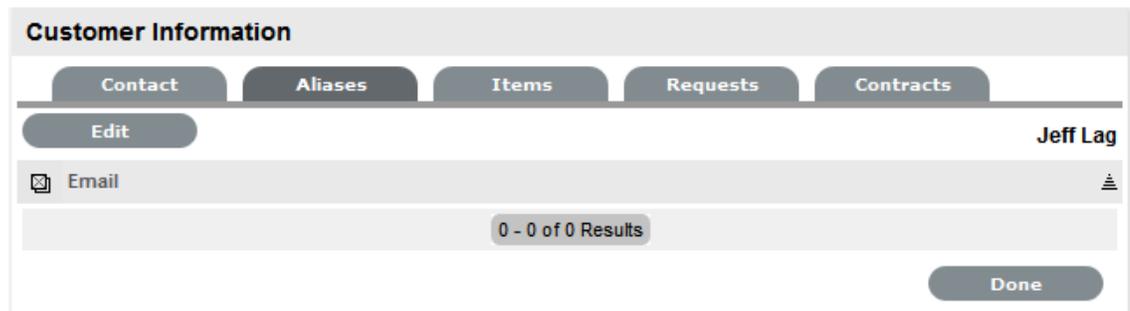
The Aliases tab is used to enter additional email addresses. Email addresses in the Aliases tab allow the Customer to send emails to the System or Team support addresses from more than one address. The system creates requests from these emails. Notifications for requests created using an address in the Aliases tab, are sent to the main email address and cc'd to the alias address that was used to create the request.

When one or more alias email addresses have been created for a Customer, a Send To field is displayed on the Customer Information screen, which allows the most appropriate email address to be set as the default address applied to Customer correspondence. When the Send To field is set to an alias address the Primary Email address is not included in the cc list, unless specified in the request Information tab cc list.

To add an alias email address:

1. Select User>Customers
2. Click on the Customer name
The Customer Information screen appears.
3. In the Aliases tab click Edit
4. Click Add
5. Enter an alias email address
6. Click Save.

When an alias email address has been created for a Customer, a Send To field is displayed on the Customer Information screen, which allows the alias email address to be set as the default address applied to Customer correspondence.

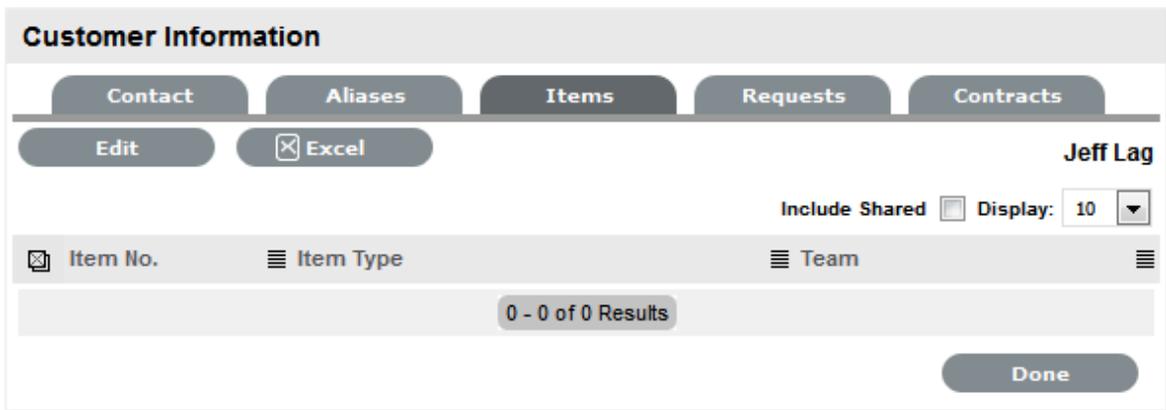


The screenshot shows the 'Customer Information' screen with the 'Aliases' tab selected. The screen has a header with 'Customer Information' and a navigation bar with tabs for 'Contact', 'Aliases', 'Items', 'Requests', and 'Contracts'. Below the navigation bar is an 'Edit' button and the name 'Jeff Lag'. There is an 'Email' section with a search icon and a '0 - 0 of 0 Results' indicator. A 'Done' button is located at the bottom right.

To remove an alias email address, in Edit mode, tick the checkbox next to the relevant email address and then click Remove.

Items Tab

The Items tab lists the Items owned by the Customer. To access Shared Items, tick the Include Shared option. To view or edit the Item details, select the Item Number hyperlink. Select the Excel button to output the Item List to Excel format.

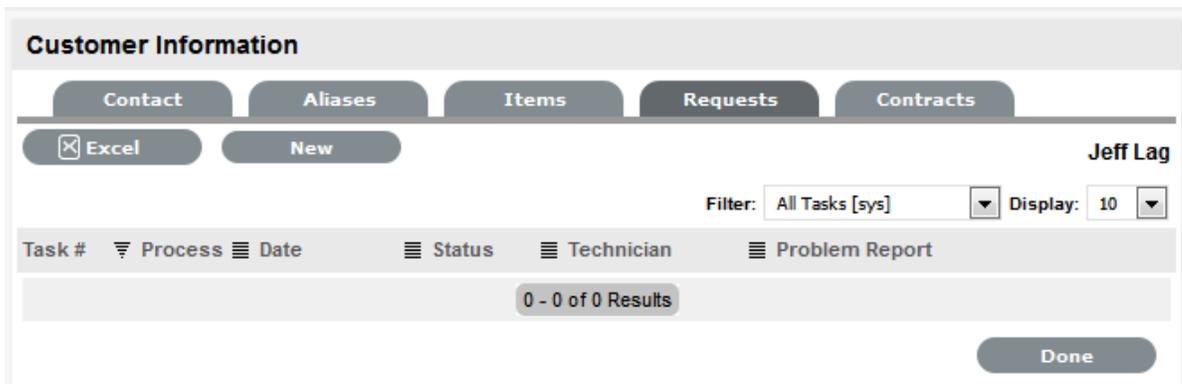


To add an Item:

1. Select User>Customers
2. Click on the Customer name
The Customer Information screen appears.
3. In the Information tab, click Edit
4. In the Item tab, click Add
The Find Item editor is displayed.
5. Search for the relevant Item
6. Select the Item # hyperlink
The selected Item will be associated with the Customer.
7. Click Save
8. Select Done.

Requests Tab

The Requests tab is visible after the Customer has been created. It lists all requests related to the Customer and allows the User to create new requests for the Customer. To view details of a request, select the Task # or Problem Report hyperlink. To create a request for the Customer, select the New button.



Contracts Tab

The Contracts tab displays a Customer's current contract status. A Customer can be assigned an SLA or, when Billing is enabled, a Contract. A Customer can only have one active Contract, but contracts can be queued within the Contract >Customer tab, as required.

When Contracts are in use throughout the application, the timeframe set for Service Levels and Contract history are displayed within the Contracts tab. It is also possible to assign a Service Level and/or Contract within the Contracts tab.

The screenshot shows the 'Customer Information' section for 'Andy Fair'. The 'Contracts' tab is selected. Below the customer name, there is an 'Edit' button and a 'Contract' section. The 'Contract' section shows 'Service Level' as 'Warranty' and 'Contract #' as 'No Contract Assigned'. Below this, there are 'Customers' and 'Items' tabs. A table displays contract information:

Contract #	Type	SLA	Invoice #	Start Date	End Date
3	Per Customer	Warranty	100004	01/05/16 12:01	01/06/16 11:09

Below the table, it says '1 - 1 of 1 Results'. There is a 'Done' button at the bottom right.

To create a new Contract for a Customer:

1. Select User>Customers
2. Select the Customer Name
3. Move to the Contracts tab
4. Click Edit

The system will display the Add button in the Customers tab

The screenshot shows the 'Customer Information' section for 'Paul Pedron'. The 'Contracts' tab is selected. Below the customer name, there is an 'Edit' button and a 'Contract' section. The 'Contract' section shows 'Service Level' as blank and 'Contract #' as 'No Contract Assigned'. Below this, there are 'Customers' and 'Items' tabs. A table displays contract information:

Contract #	Type	SLA	Invoice #	Start Date	End Date
------------	------	-----	-----------	------------	----------

Below the table, it says '0 - 0 of 0 Results'. There is a 'Done' button at the bottom right.

5. Click Add

The SLA options are displayed.

6. Select a Service Level from the list

When selected, the screen expands to display the Time, Start and End date fields.

Customer Information

Contact Aliases Items Requests Contracts

Contract

Invoice Number 100032

Service Level SLA

Incident

Priority	Response Time	Restoration Time	Resolution Time	24 x 7 support	Alert
Urgent	6 Hours	12 Hours	24 Hours	Yes	None
High	12 Hours	24 Hours	48 Hours	Yes	None
Medium	18 Hours	36 Hours	72 Hours	Yes	None
Low	24 Hours	48 Hours	96 Hours	Yes	None

Contract Type Per Customer

Time Support Hours

Support Hours

Start Date 01/06/16 14:15

End Date 01/06/17 23:59

Notes

Price \$100.00

Tax \$0.00

Taxable

Total Cost \$100.00

Cancel Save

7. Define the Contract Time period

For the Per Customer Contract Type the Time Period for the Contract can be defined:

If *Subscription* is selected, the Start and End Dates are automatically completed by the system, but can be edited if required.

If *Time Limited Subscription* is selected, the Support Hours field is displayed and the number of support hours purchased by the Customer should be entered. Also, the Start Date and End Date fields should be completed manually, entering the length of time for the subscription period.

If *Support Hours* is selected, the number of support hours purchased by the Customers should be entered

If *Support Hours By Month* is selected, define the number of Support Hours covered per month and on which day of the month the Contract is designated as the Rollover Day. The Start Date and End Date fields are automatically completed as an annual contract subscription but can be edited, as required.

If the Start Date is set as a future date, the Pending Contract status is assigned.

8. Click Save

9. Click Next to continue

The system reverts to the Contracts summary screen.

The screenshot shows the 'Customer Information' screen for 'Michael Angelo'. It has tabs for 'Contact', 'Aliases', 'Items', 'Requests', and 'Contracts'. The 'Contracts' tab is active, showing a summary for Contract # 2 with details: Service Level: Warranty, Contract Type: Subscription, Invoice #: 100002, Start Date: 01/05/16, End Date: 01/05/17, and Expires: 1 Year 0 Day. Below this is a table with columns: Contract #, Type, SLA, Invoice #, Start Date, End Date, and buttons for Add and Delete. The table contains one row for Contract # 2, Type Per Customer, SLA Warranty, Invoice # 100002, Start Date 01/05/16 11:59, and End Date 01/05/17 23:59. At the bottom, there are 'Cancel' and 'Save' buttons.

Contract #	Type	SLA	Invoice #	Start Date	End Date	
2	Per Customer	Warranty	100002	01/05/16 11:59	01/05/17 23:59	<input type="checkbox"/> Add Delete

10. Click Save. Click Done.

To delete a current Contract, as a Supervisor User, select next to the Contract Number. Alternatively, to delete a current or queued Contract, within the Contract>Customers tab check the field next to the relevant Contract # and select the Delete button.

The Items tab within the Customer>Contracts screen is used to list all the Items with a Contract that are owned by a Customer.

The list of requests with the time recorded against the Contract is displayed within the Audit tab. The Summary view displays the list of requests with total number of Notes and Time allocated to the Contract, while the Detail view includes a breakdown of all Notes and the associated time related to each request.

Searching for Customers

To search for Customers within the Users>Customers tab:

1. Go to Users>Customer
2. Select



3. Enter any known Customer details to find a specific Customer or to generate a Customer List based on date of creation, enter a Before or After creation date for the Customer.

Customer Search

First Name

Last Name

Email

Phone

Org. Unit

Country ▼

Created Before

Created After

Role ▼

Account Type LDAP/ADS Novell Service Desk All

4. Click Search.

The results will be displayed in a table with the Customer Name and contact information.

5. Click on the Customer Name to open the Customer Information module or select the Email Address to send an email.

NOTE: To search for a Customer who has been deleted in the system, conduct the search within the Administrator Portal.

2.8.2 Organizational Units

Customers can be assigned to a Company within the system. This can be refined by allocating the Customer to a Department, and if relevant, to a specific Room. This information is stored within the Organizational Unit details.

NOTE: Companies can exist without Departments, but Departments and Rooms can only be created as part of Company information.

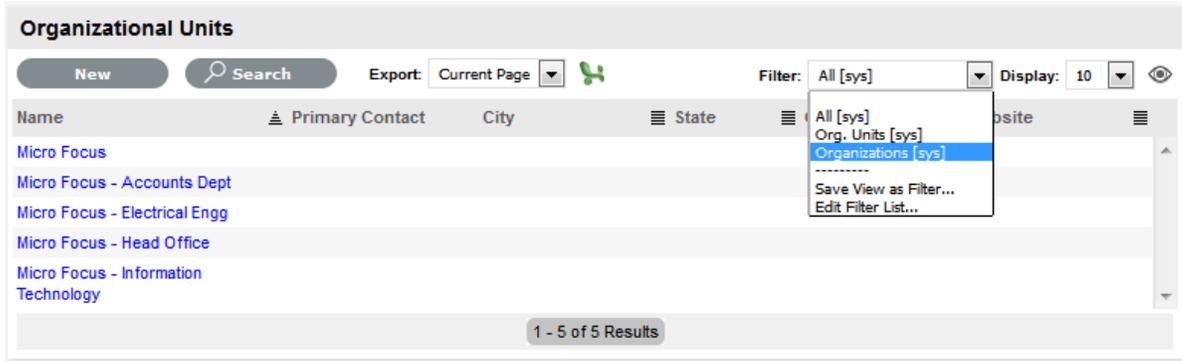
Technicians can also be assigned to service specific Organizational Units.

Organizational Unit Filters

The Organizational Unit list can be filtered to display the following views:

System List Filters	Description
Organizations	Shows the Companies supported by the service desk.
Org. Units	Lists all Departments included within Companies.
All	Lists complete Org Units, with Company and Department names.

To change the List View, select the relevant option from the Filter list.



Organizational Units and External Authentication

Organizational Unit relationships can also be mapped from an authentication server. By default this is not enabled. To activate Customer Organizational Unit mapping, as an Administrator go to the Advanced tab for the selected authentication server within Admin>Setup>Authentication. Select Yes for the Import Customer Organizational Units option.

A screenshot of the 'Customer Orgs' configuration form. It has three sections: 'Customer Orgs' with radio buttons for 'Yes' (selected) and 'No'; 'Company' with radio buttons for 'Standard' (selected) and 'Custom', and a dropdown menu showing 'company'; and 'Department' with radio buttons for 'Standard' (selected) and 'Custom', and a dropdown menu showing 'department'.

NOTE: The details of the Org. Units are not populated upon this synch, only the Org Unit names. For the Org Unit details to be assigned to Customer or User Information, create the Org Unit in the Supervisor>User>Org Units tab and ensure the Org Unit name is identical to what is stored in the authentication server. If the details are not identical, the system will create another Org. Unit.

Details Tab

Use the Details tab to create an Organizational Unit.

Creating an Organizational Unit

To create an Organizational Unit:

1. Select User>Organizational Units
2. Click New
3. Complete the Organizational Unit Name
4. Select Organizations or Org. Units within the Filter drop-down list

5. Enter other details, if required
6. Select Handshaking override option, if relevant

If the System Default Handshaking Close Action days is to be adjusted for the Org. Unit, select Yes in the Handshaking Override field. Enter the number of Days to lapse before a request will close if the Customer does not respond to the handshake email notification.

7. If appropriate, set the Partner Organization

(The Partner Organization is an external service provider that includes Partner Users who can manage requests logged with the system for Customers associated with the Company or Department being created.)

8. Click Save.

Primary Contact

When multiple Customers are assigned to an Organizational Unit, a Primary Contact person can be allocated for the Org Unit. This is the preferred person the Service Desk will contact for issues relating to the Org Unit.

To assign a Primary Contact:

1. Select User>Organizational Units
2. Select an Org Unit Name

The Details tab is displayed. If Customers have been assigned to the Org Unit a Primary Contact field will be visible.

3. Within the Details tab, click Edit

The Find Customer box is displayed. (Note that this search is only visible when Customers have been assigned to the Org. Unit)

4. Search for the Customer

To view all available Customers click Search without entering a Customer last name in the search field.

5. Click the Customer name to assign them as the Primary Contact
6. Click Save.

Default Item

When an Organizational Unit owns multiple Items, within the Default Item field an Item can be used as the one to be automatically applied to all requests created via email for the Organizational Unit.

To assign a Default Item:

1. Select User>Organizational Units
2. Select an Org Unit Name

The Details tab is displayed with the Default Item visible at the bottom of the first column.

3. Within the Details tab, click Edit
- The Find Item box is displayed.

4. Search for the Item

To view all available Items click without entering an Item Number in the search field.

5. Click the Item Number link to assign it as the Default Item
6. Click Save.

Customers Tab

This tab displays all Customers assigned to the Organizational Unit. Customers cannot be added within this screen, as they are allocated to Org. Units when they are created or through the User>Customer>Customer Information screen. The list can be filtered based on Customers directly assigned to the Org. Unit, or all Customers associated with Company Org. Units including those associated with related Departments.

Org. Unit Information

Details Customers Technicians Departments Items Requests Contracts

Micro Focus

All
All
Assigned

Customer Name	Email Address	Phone	Org. Unit
Andy Fair	andy@nsd.com		Micro Focus - Head Office
Anil k	anil@nsd.com		Micro Focus - Accounts Dept
Guruprasad S	guru@nsd.com		Micro Focus - Electrical Engg
James Stewart	james@nsd.com		Micro Focus - Information Technology
Jason Blackett	jason@nsd.com		Micro Focus - Information Technology
Jeff Lag	jeff@nsd.com		Micro Focus - Head Office
Michael Angelo	michael@nsd.com		Micro Focus - Head Office
Paul Pedron	paul@nsd.com		Micro Focus - Head Office
Sachin Kumar	sachin@nsd.com		Micro Focus - Electrical Engg
Sunil k	sunil@nsd.com		Micro Focus - Accounts Dept

1 - 10 of 11 Results

Done

Technicians Tab

The Technicians tab allows support technicians to be assigned as key support staff for an Org. Unit. This means when requests are created, the system checks if the Item's Organizational Unit has Technicians assigned to service its request. If so, the request is routed to a Technician assigned to the Org. Unit.

Assigning a Technician to an Organizational Unit

To assign a Technician to an Organizational Unit:

1. Select User>Organizational Units
2. Select Org Unit Name
3. Move to the Technicians tab
4. Click Edit
5. Click New

Org. Unit Information

Details Customers Technicians Departments Items Requests Contracts

Micro Focus

Available Technicians: Craig Wilson

Cancel Save

Technician Ingo Engels Email

Joe K joe@nsd.com

Kamal K

Sankar R

Vaibhav Jain

1 - 1 of 1 Results

6. Select a Technician name from the drop-down list
7. Click Save
8. Select Done.

Deleting a Technician Assignment

To delete a Technician assignment:

1. Select User>Organizational Units
2. Select the Org Unit Name
3. Move to the Technicians tab
4. Click Edit
5. Tick the checkbox next to the Technician name
6. Click Delete
7. Click Done.

Departments Tab

The Departments tab allows Company group information to be refined. Departments are created for a Company within the Departments Tab.

Creating a Department

To create a Department:

1. Select User>Organizational Units
2. Select Org Unit Company Name
3. Move to the Departments tab

The screenshot shows the 'Org. Unit Information' interface with the 'Departments' tab selected. The interface includes a 'New' button, a table of department entries, and a 'Done' button. The table has columns for 'Department Name', 'Primary Contact', and 'Phone'. The entries listed are:

Department Name	Primary Contact	Phone
Micro Focus - Accounts Dept	Anil k	
Micro Focus - Electrical Engg		
Micro Focus - Head Office		
Micro Focus - Information Technology		

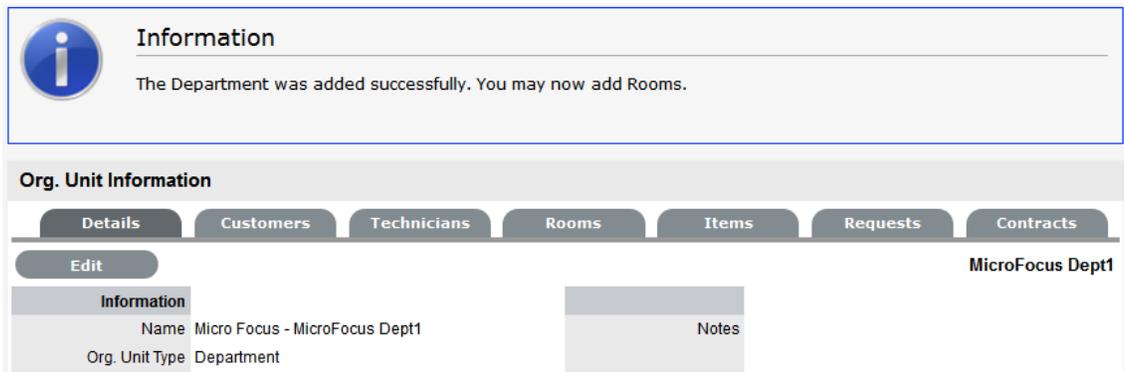
Below the table, there is a '1 - 4 of 4 Results' indicator and a 'Done' button.

4. Click New
5. Enter the Department Name
6. Enter other details, if required
7. Select Handshaking override option, if relevant

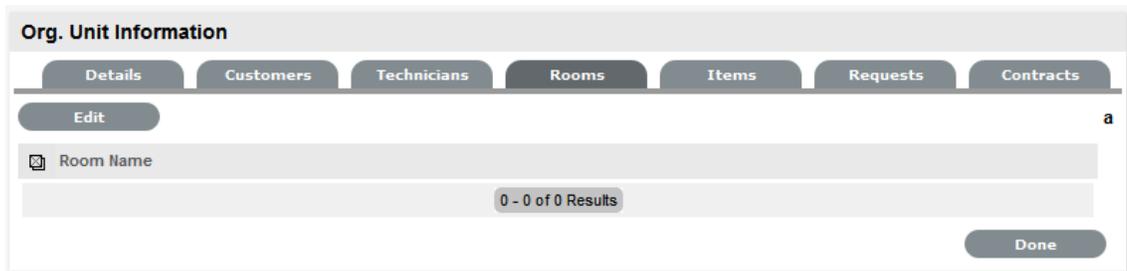
If the System Default Handshaking Close Action days is to be adjusted for the Org. Unit, select Yes in the Handshaking Override field. Enter the number of Days to lapse before a request will close if the Customer does not respond to the handshake email notification.

8. Click Done

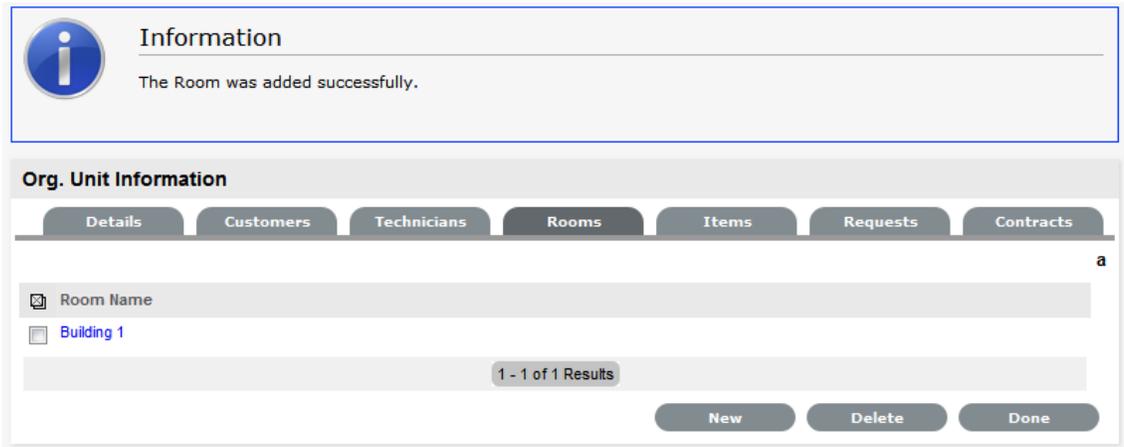
The system will move to the Department Editor, to allow Rooms to be added to the Department.



9. Select the Rooms tab if Rooms are to be added immediately
10. Click Edit
11. Select New



12. Enter the Room details
13. Click Save
14. Click New to add another Room or select Done.



Edit a Department

Department details are edited through the *Org. Units Filter of the Organizational Unit list*.

To edit a Department:

1. Go to User > Org Units
2. Select the filter option Org.Units (sys)

3. Select a Department from the list provided
4. Click Edit
5. Modify the details as necessary
6. Select Save.

Rooms Tab

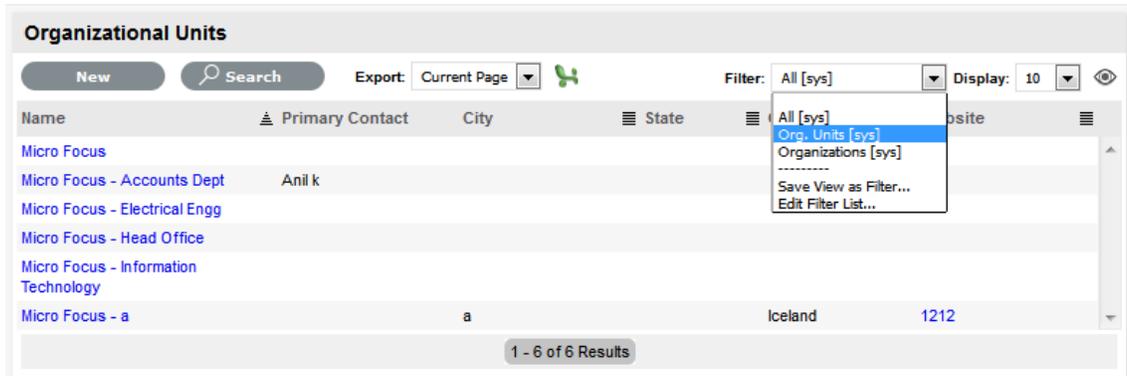
To expand Department details, Room locations can be created. This allows Customers to be assigned to specific locations within an Organizational Unit. The Rooms tab is only visible for Department Org Units that are accessed through the *Org.Unit filter of the Org Unit list*.



Adding a Room to a Department

To add a Room to a Department:

1. Within the Organizational Units list select the Org.Units filter



2. Select the relevant Department/Org.Unit link
3. Move to the Rooms tab
4. Click Edit
5. Click New
6. Enter the Room Name
7. Click Save.

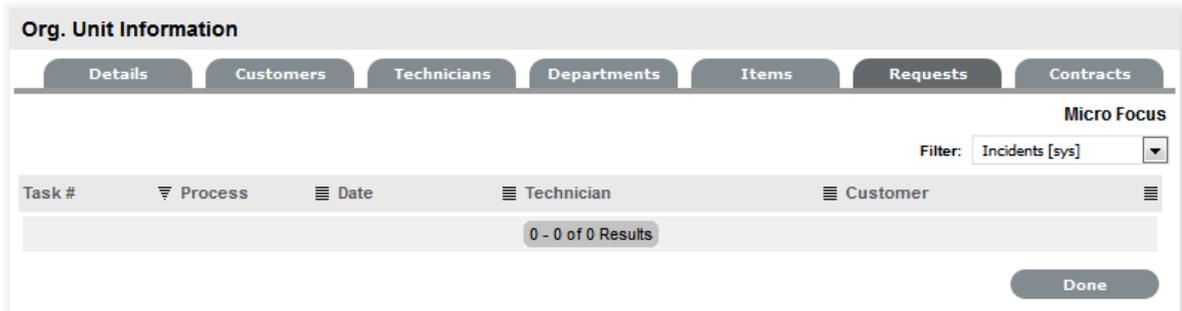
Items Tab

This tab lists all the Items that have been assigned to the Organizational Unit.



Requests Tab

This tab lists all requests generated by the Organizational Unit. To view or modify a request, select the Task# hyperlink.



Contracts Tab

The Contracts tab displays an Organizational Unit's current contract status. An Organizational Unit can be assigned an SLA or, when Billing is enabled, a Contract that manages the period of time the SLA applies to the Org Unit. When Contracts are enabled, an Organizational Unit can have only one active Contract in the system at any one time and must have an assigned Primary Contact.

To update the Service Level assignment when Contracts are disabled:

1. User>Organization Units
2. Select the required Org Unit
The Org Unit Information screen will open.
3. Select the Contracts tab, click Edit
4. In SLA Details, using the drop-down menu, select the SLA
5. Select Save.

When Contracts are in use throughout the application, timeframes are set for Service Levels and Contract history is displayed within the Contracts tab. It is also possible to assign a Service Level and/or Contract within the Contracts tab.

Org. Unit Information

Accounts Dept

Details Customers Technicians Rooms Items Requests Contracts

Contract

Service Level [Warranty](#)

Contract # 5

Contract Type Subscription

Invoice # [100008](#)

Start Date 01/05/16

End Date 03/02/18

Expires 2 Years 1 Month 14 Days

Items Org Unit Customers Requests Audit

Contract #	Type	SLA	Invoice #	Start Date	End Date	
5	Per Org Unit	Warranty	100008	01/05/16 12:12	03/02/18 23:59	Add Delete
1	Per Org Unit	Warranty	100001	01/05/16 11:53	01/05/16 12:11	

1 - 2 of 2 Results

[Cancel](#) [Save](#)

To create a new Contract for an Organizational Unit:

NOTE: To assign a Contract to an Org Unit, a Primary Contact must be nominated for the Org Unit or the system will prompt the User to assign a Primary Contact during the Contract assignment process. This means, prior to creating the Contract assign at least one Customer to the Org Unit and then designate a Customer as the [Primary Contact](#).

To assign a primary contact:

1. Select User>Organizational Units
2. Select an Org Unit Name

The Details tab is displayed. If Customers have been assigned to the Org Unit a Primary Contact field will be visible.

3. Within the Details tab, click Edit

The Find Customer box is displayed. (Note that this search is only visible when customers have been assigned to the org unit)

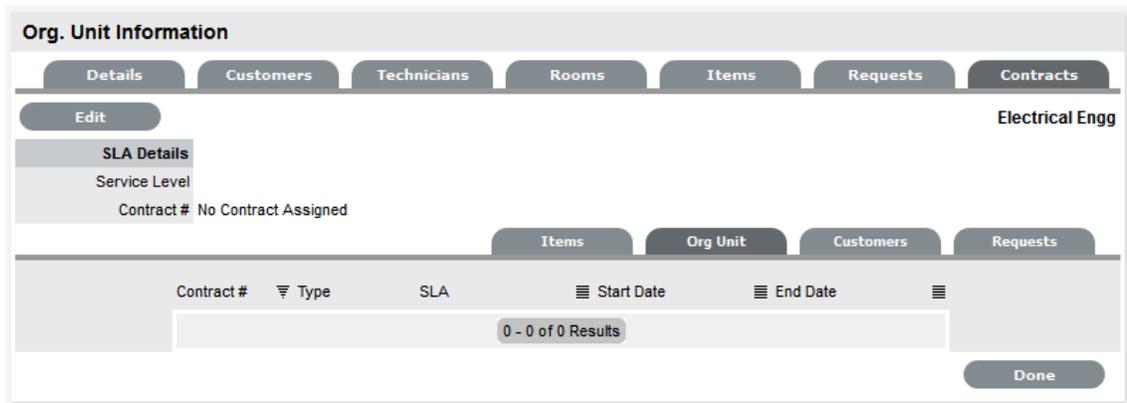
Primary Contact **Find Customer (Last name)**

[Search](#)

4. Search for the Customer. To view all available customers click Search without entering a customer last name in the search field
5. Click the Customer name to assign them as the Primary Contact
6. Click Save.

To create a new Contract for an Organizational Unit:

1. Select User> Organizational Units
2. Select the Organizational Unit's Name
3. Move to the Contracts tab



4. Click Edit

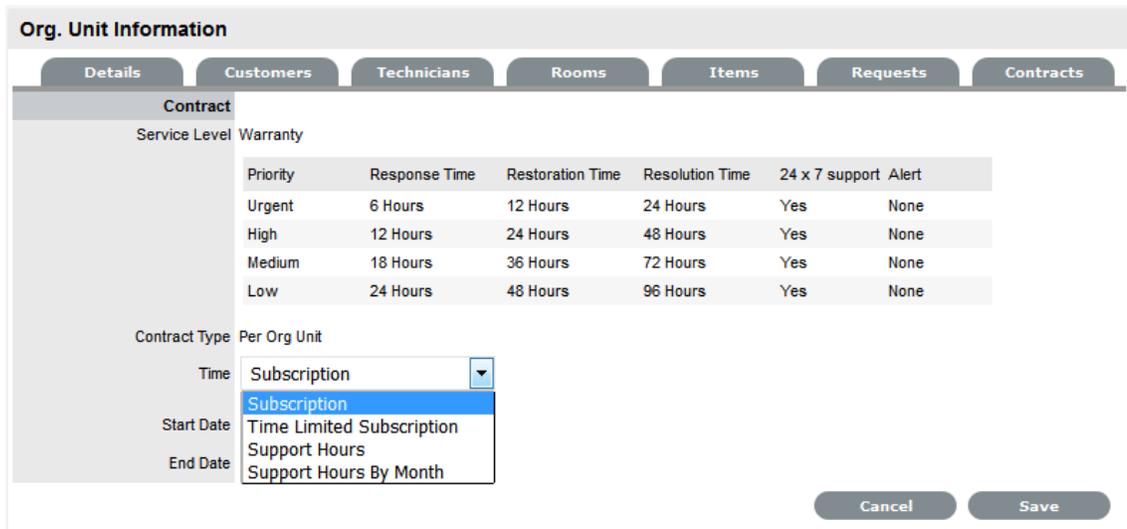
The Add and Delete buttons become available with the Contracts>Org Unit tab.

5. Click Add

If a Primary Contact has not been assigned to the Org Unit a system prompt will notify the User to create a Primary Contact.

6. Select a Service Level from the list

When selected, the screen expands to display start and end date fields.



7. For the Per Org Unit Contract Type the Time Period for the Contract can be defined as one of the following:

Subscription if selected, the Start and End Dates are automatically set to a year from the date of creation, but can be edited if required.

Time Limited Subscription if selected, the Support Hours field is displayed and the number of support hours purchased by the Customer should be entered. Also, the Start Date and End Date fields should be completed manually by entering the length of time for the subscription period, or the system will default to entering a year from the date of creation.

Support Hours if selected, the number of support hours purchased by the Customers should be entered.

Support Hours by Month if selected, set the number of hours purchased per month and define which day of the month contract is to rollover to start the new month. The Total Support Hours will automatically be calculated based on the Start and End Dates set for the Contract.

(If a Contract is forward dated with a Start Date set in the future, the Pending Contract status is assigned.

8. Click Save
9. Click Next to continue

The system reverts to the Contracts summary screen, if the contract is forward dated and another contract is not already active, the Enable Contract option button will be available. Select this button if the contract is to commence prior to the set Start Date. Alternatively, other contracts can be queued for the Org Unit by selecting the Add button.

The screenshot shows the 'Org. Unit Information' screen for 'Accounts Dept'. The 'SLA Details' section shows 'Service Level: Warranty', 'Contract #: No Contract Assigned', and 'Pending Contract #: 5' with an 'Enable Contract' button. Below is a table of contracts:

Contract #	Type	SLA	Start Date	End Date
5	Per Org Unit	Warranty	02/02/17 12:10	03/02/18 23:59
1	Per Org Unit	Warranty	01/05/16 11:53	01/05/16 12:11

Buttons for 'Add', 'Delete', 'Cancel', and 'Save' are visible.

10. Click Save
- To process the contract before the set Start Date select the Enable button.

This screenshot is similar to the previous one, but the 'Enable Contract' button next to 'Pending Contract #: 5' is highlighted. The table of contracts remains the same. A 'Done' button is visible at the bottom right.

11. Click Done.
- A success message is displayed.



Information

New contract is enabled for this Org. Unit.

Org. Unit Information

Details Customers Technicians Rooms Items Requests Contracts

Edit Accounts Dept

SLA Details

Service Level Warranty

Contract # 5

Contract Type Subscription

Start Date 01/05/16

End Date 03/02/18

Expires 2 Years 1 Month 27 Days

Items Org Unit Customers Requests Audit

Contract #	Type	SLA	Start Date	End Date
5	Per Org Unit	Warranty	01/05/16 12:12	03/02/18 23:59
1	Per Org Unit	Warranty	01/05/16 11:53	01/05/16 12:11

1 - 2 of 2 Results

Done

NOTE: If Invoices are enabled, a new invoice is automatically saved within the Finance>Invoices screen for the newly created Contract. If payment is required, a Pending Invoice Number is displayed and once processed, the Contract will be listed in the Org.Unit Information>Contracts>Org.Unit tab.

To delete a current Contract, as a Supervisor User, select next to the Contract Number. Alternatively, to delete a current or queued Contract, within the Contract>Org Unit tab check the field next to the relevant Contract # and select the Delete button.

The Items and Customers tab within the Org Unit>Contracts screen is used to list all the Items and Customers Contracts that are associated with the selected Org Unit.

2.8.3 Partner Organizations

Partner Organizations are used in the management of requests between Customers/Organizational Units and external service providers within the support system. It allows multiple Partner Users to be available within a Team, and assigned at relevant levels of escalations for working on requests. Users who are assigned the Partner Role must be associated with a Partner Organization and this is done manually within the User Information screen or within the Partner Organization > Technician tab. If a Partner User is created and not associated with a Partner Organization, they cannot be assigned to a Team and therefore cannot work on requests.

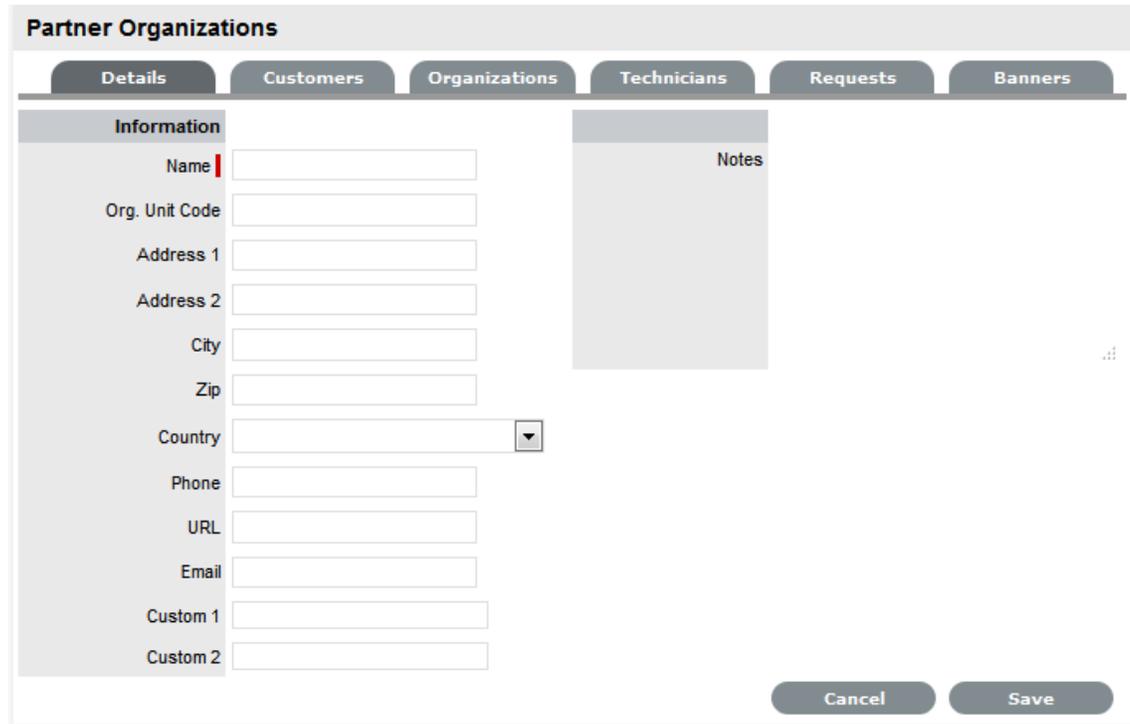
Partner Users who are associated via the Partner Organization with a Customer or Organizational Unit that log a request, if assigned within the Team and Layer assigned to the request, will automatically be allocated the request in preference to internal Technician Users.

The Partner Organization capability also allows the banner within the Customer Portal for Customers associated with the Partner Organization, to be branded for the Partner Organization.

Creating a Partner Organization

To create a Partner Organization:

1. Select User>Partner Organizations
2. Click New
3. Complete the Partner Organization Name



The screenshot shows a web application interface for creating a Partner Organization. The main title is "Partner Organizations". Below the title are six tabs: "Details", "Customers", "Organizations", "Technicians", "Requests", and "Banners". The "Details" tab is currently selected. Under the "Details" tab, there is an "Information" section with the following fields: Name (with a red vertical bar on the left), Org. Unit Code, Address 1, Address 2, City, Zip, Country (a dropdown menu), Phone, URL, Email, Custom 1, and Custom 2. To the right of these fields is a "Notes" section, which is currently empty. At the bottom right of the form are two buttons: "Cancel" and "Save".

4. Enter other details, if required
5. Click Save.

Customers Tab

This tab displays all Customers associated with the Partner Organization, either through the Customer Information Screen or via the Customer's association with a related Organizational Unit. Customers cannot be added within this screen, as they are allocated to Org. Units when they are created or through the User>Customer>Customer Information screen.

Partner Organizations

Details Customers Organizations Technicians Requests Banners

PO1

Customer Name	Email Address	Phone	Org. Unit
Andy Fair	andy@nsd.com		Micro Focus - Head Office
Anil k	anil@nsd.com		Micro Focus - Accounts Dept
Ashley Adam	aav@nsd.com		Micro Focus
Guruprasad S	guru@nsd.com		Micro Focus - Electrical Engg
James Stewart	james@nsd.com		Micro Focus - Information Technology
Jason Blackett	jason@nsd.com		Micro Focus - Information Technology
Jeff Lag	jeff@nsd.com		Micro Focus - Head Office
Michael Angelo	michael@nsd.com		Micro Focus - SMG
Paul Pedron	paul@nsd.com		Micro Focus - Head Office
Sachin Kumar	sachin@nsd.com		Micro Focus - Electrical Engg

1 - 10 of 12 Results

Done

Organizations Tab

This tab displays all Organizational Units associated with the Partner Organization. Organizational Units cannot be added within this screen, as the association is made within the Details tab of an Organizational Unit Information screen. This means when requests are created, the system checks if a Customer's Organizational Unit is associated with a Partner Organization and if so, priority for assigning the request is given to Partner Users of that Partner Organization within the escalation layer of the assigned Team.

Partner Organizations

Details Customers Organizations Technicians Requests Banners

PO1

Client Org Unit	Primary Contact	Phone
Micro Focus	Michael Angelo	

1 - 1 of 1 Results

Done

Technicians Tab

The Technicians tab displays Users with the Partner Role who are associated with the Partner Organization. This association can be made within the User Information screen or within this tab. This means when requests are created, the system checks if the Customer is associated with a Partner Organization and if so, priority for assigning the request is given to Partner Users within the relevant Team escalation layer.

When Partner Users are created they are not automatically associated with a Partner Organization, this association needs to be made within their User Information screen or this tab.

To assign a Partner User to a Partner Organization:

1. Select User>Partner Organizations
2. Select Org Unit Name
3. Move to the Technicians tab
4. Click Edit

Partner Organizations

Details Customers Organizations Technicians Requests Banners

Available Partners: Cancel Save

Technician [Email](#)

0 - 0 of 0 Results

P01

5. Click New
6. Select a Technician name from the drop-down list
For Partner Users to be available in the displayed list, Users must be assigned the Partner Role within the User Information screen.
7. Click Save
8. Select Done.

Deleting a Partner User Assignment

To delete a Partner User assignment:

1. Select User>Organizational Units
2. Select the Org Unit Name
3. Move to the Technicians tab
4. Click Edit
5. Tick the checkbox next to the Technician name
6. Click Delete
7. Click Done.

Requests Tab

This tab lists all requests assigned to Users associated with the Partner Organization. To view or modify a request, select the Task# hyperlink.

Partner Organizations

Details Customers Organizations Technicians Requests Banners

Filter: All Tasks [sys]

Task #	Process	Date	Technician	Customer
100010	Incident	06/20/16	Michel	Simon Super

0 - 0 of 0 Results

Done

Banners

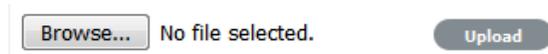
Within the Banners tab, a banner that brands the Partner Organization can be uploaded. This will override the system Customer Portal banner within Customer Portals for Customers associated with the Partner Organization. The graphic should be 500x70 pixels and PNG format.

Adding a Customized Banner

To add a customized banner within the Banners tab of the Partner Organization:

1. Select the Banners tab
2. Tick the *Use Custom* checkbox in the top right corner of the *screen*
3. Click *New*

A window with a browse function appears.



4. *Browse* to the location of the image and click .
The image will be uploaded.
5. *Click Save*. *The uploaded banner will be visible in the Customer Portal for all Customers associated with the Partner Organization.*

2.8.4 Users

- ◆ [“User Availability” on page 718](#)
- ◆ [“Creating a User Account” on page 718](#)
- ◆ [“Information Tab” on page 718](#)
- ◆ [“Schedule Tab” on page 723](#)
- ◆ [“Aliases Tab” on page 725](#)
- ◆ [“Team Tab” on page 726](#)
- ◆ [“Skills Tab” on page 728](#)
- ◆ [“Org Units” on page 729](#)

Users within the service management system that are assigned to support Teams must be allocated one of the following Roles:

- ◆ Technician
- ◆ Supervisor
- ◆ Partner.

The above User Roles can work on requests, relevant to the Processes they have been allocated (i.e., Incident, Problem, Change or Service Requests). The About Roles section of the User Guide provides more information regarding specific User Roles in the system.

User Availability

The User List View includes the User Availability status by default, this is based on work hours configured in the Schedule tab of the User and their Vacation Status.

The following icons may be displayed in the List View:

Available



The User is not on leave and is available for request assignment based on their assigned work hours.



The User is not on leave but is not available for request assignment based on their assigned work hours.

Or, if no hours are set within the Schedule tab when the "Define Works Hours" is enabled within Admin>Setup>Privileges>User screen and the User is not on vacation, the system will consider Users to be unavailable.



The User is On Vacation. If the User logs into the system when assigned this status, they will not have to the User Portal. However, if they are also have Customer Web Access, when they log in to the system they default to the Customer Portal.

Creating a User Account

When creating a new User, the following tabs are available:

- ◆ Information
- ◆ Aliases
- ◆ Team
- ◆ Skills
- ◆ Types.

Information Tab

Within the User Information tab, User details can be created, viewed and edited. User Roles, Process assignment and default Login credentials can all be customized within this tab.

NOTE: If Custom Fields are to be created for User Information, it is recommended that the Administrator complete the customization prior to creating Users.

To create a new User:

1. Select User>Users
2. Click New

The User Information screen appears.

User Information Fields

Title	Select a title from the drop-down menu options. (This field is displayed if the Enable Titles option is set to Yes in the Admin>Setup>Setup>Privileges>Customer tab.)
First Name*	Enter the User's First Name.
Last Name*	Enter the User's Last Name.
User Name*	Enter a LiveTime User Name (unique).
Password*	Enter a User Password. Note: Passwords can be changed under the Users Tab or reset by the User under their My Account tab.
Roles*	Assign a Role for the User. Each Role has associated permissions. Every Technician Role assigned also needs a Supervisor assigned. NOTE: Note: More than one Role can be assigned but only one of Supervisor, Partner or Technician can be allocated per User.
Default Portal*	The Default Portal is the User Interface accessed by default when a User with multiple Roles logs into the system. NOTE: If the Users Default Portal is set to Customer, the User details will not be accessible in the Users list, but included in the list within the User>Customer tab.
Assignment Template	This option is visible in a new User Information screen if Job Assignment Templates are configured in the User> Assignments tab. Select a template to assign the new User to multiple Teams, Escalation layers and Processes.
Operations Processes	Assign the licensed access for Request Fulfilment, Incident and Problem Management. Assigning Processes to the User gives them access to support those Processes and enables them to be assigned as Team members for those Processes' Teams.
Change Processes	Assign the licensed access for Change, Release and Deployment Management. Note, Users assigned Release are automatically assigned Deployment.

User Information Fields

Internal Processes	<p>Enable the Users privilege to maintain Service Level, Configuration and Knowledge Management.</p> <p>Selecting the Configuration and Knowledge options displays the relevant fields that enable granular controls to be set for those processes.</p> <p>NOTE: The Finance Role is limited to the processes of Configuration and Service Level Management.</p>
Knowledge	<p>If the User is assigned the Knowledge Management process, their privilege to create, edit, delete and/or publish KBAs can be configured.</p>
Configuration	<p>If the User is assigned the Configuration Management process, their privilege to create, edit and/or delete Items within the CMDB can be configured on a per task basis.</p>
Customer Org Unit	<p>If the User is also allocated a Customer Role within the system, this field is displayed. Enter Company or Department details that apply to the User in their Customer Role.</p>
Line Manager	<p>(This field is visible if the User is also assign a Customer Role within the system. The information can not be edited if the line manager details are set by the LDAP synch.)</p> <p>If relevant, assign a system user with the Customer Role who can approve/reject requests made by this Customer.</p>
Primary Email*	<p>Enter the User's email address. System messages are sent to this address.</p>
Send To	<p>This field becomes available for Users that have the Customer Role and have alternate email addresses entered on the Aliases tab.</p> <p>Select the most appropriate email address to be set as the default address applied to Customer correspondence. When the Send To field is set to an alias address the Primary Email address is not included in the cc list, unless specified in the request Information tab cc list.</p>
Phone	<p>Enter telephone details.</p>

User Information Fields

Mobile	<p>A mobile number can be entered as a contact number or for use with SMS (Short Mail Service message). An SMS can be sent to notify the assigned Technician when a Service Request is raised.</p> <p>SMS Messaging options:</p> <ul style="list-style-type: none">◆ From the drop down list, select the SMS service provider.◆ Override SMS Address. If your service provider does not appear in the list, click this checkbox and enter an alternate Service Provider.
SMS Override	<p>Enter SMS Gateway override details for the User, if a number other than the one entered in the Mobile field is to be used to send/receive updates via SMS. Enter the complete SMS details in email address format, i.e., 000777891@smsgateway.provider.com.</p>
Fax	<p>Enter known fax details.</p>
Pager	<p>Enter pager details.</p>
Salary	<p>An annual salary can be entered. This value is used for reporting.</p>
Forum Moderator	<p>Select this checkbox to designate this User as a forum moderator. See Forums.</p>
Survey Manager	<p>Select this checkbox to enable this User to create and manage surveys in the system.</p>
Supervisor*	<p>Select a Supervisor, if the User has a technician role. Users with the Technician Role must be allocated a Supervisor.</p>
Partner For	<p>When a User is assigned the Partner Role, their associated Partner Organization must be assigned within this field.</p>
Partner	<p>If the User is also assigned a Customer Role, this field allows the Customer to be associated with a Partner Organization who will handle their requests when they are logged in the system.</p>
Available	<p>Shows if the User is available for requests to be assigned to them. This is based on work hours configured in the Schedule tab of the User and their Vacation Status. If no hours are set within the Schedule tab when the "Define Works Hours" is enabled within Admin>Setup>Privileges>User screen and the User is not on vacation, the system will consider them to be unavailable.</p>

User Information Fields

Assignment	**Visible when the Assignment Control is enabled in Admin>Setup>Privileges>User. Set to Off if the User is not to be assigned new requests, irrespective of their Availability status.
On Vacation	Placing a Technician on vacation excludes them from being assigned new requests automatically. When On Vacation is activated a Technician's existing requests are not reassigned.
Training	This option is only visible for Technician Users, and when enabled allows the User to be included in Teams to view requests but does not allow them to put the request in edit mode or add Notes.
Email Locale	Adjust the default language for email correspondence, if required.
Country	The User automatically adopts the default Country set for the system. However, the Country can be manually adjusted here for the specific User.
State	Set the State information based on the Country selected, if required.
Timezone	The User automatically adopts the default Timezone set for the system. However, the Timezone can be manually adjusted for the specific User.
GPS	The GPS coordinates of the last known address.

* Denotes Mandatory Fields

1. Complete the User detail information
2. Click Done.

Emailing User Details



To email a User regarding their system log in credentials, click the Email button within the User Information screen. If Random Passwords is enabled, selecting Email will reset the Password and forward the details to the User. If Password Questions is enabled in Setup>Privileges>System, selecting Email will send a link to the User directing them to a page that includes the security questions set for their account and reset the password based on the answers provided. Customers must complete this process within an hour of the email being sent.

vCard Button



Select this option to download and open the User's information in an electronic business card format, to email or save outside the system.

Schedule Tab

By default the Schedule tab includes the On Vacation option, which can be set to Yes when the User takes leave. The system will automatically re-assign the User's active requests, if the Vacation Reassign option has been enabled in the Admin>Setup>Privileges>User tab. If this option has not been enabled, a Supervisor User will need to manually re-assign the requests, if required.

If the system Setup has been configured to Define Work Hours and Schedule Vacations, this additional functionality is available within the Schedule tab.

The screenshot shows the 'User Information' interface for 'Ingo Engels'. The 'Schedule' tab is active, displaying 'Working Hours' and 'Holidays' sections. The 'Working Hours' section shows a relative time zone of '(GMT +5:30) New Delhi' and an 'Apply Template' dropdown. Below are time slots for each day of the week: Sunday (unavailable), Monday-Friday (09:00 to 17:00), and Saturday (unavailable). The 'Holidays' section has 'On Vacation' set to 'No' and a 'Schedule' section with '+' and '-' icons. At the bottom, there is a table header with columns: Purpose, Start Date, End Date, and Active. Below the header, it shows '0 - 0 of 0 Results'. 'Cancel' and 'Save' buttons are at the bottom right.

Define Work Hours

Use the drop-down lists to set the hours of work the User is available for the week. Based on what is set here, the system will assign requests to the User during their available hours. However, if no other Technician is available for requests based on their defined work hours, the system will assign the User new requests outside of their set work hours.

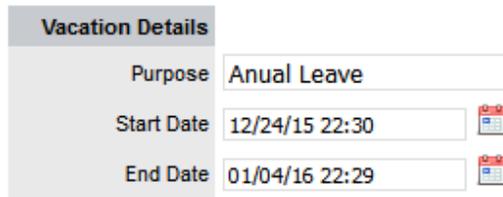
NOTE: If the Technician Define Work Hours option has been enabled, the hours of work **MUST** be defined, otherwise the system will ignore the Technician Assignment logic and automatically allocate new requests to the Team Lead.

Schedule Holidays

The Schedule Holidays functionality allows the Supervisor to pre-book leave in the system for Users. There are no restrictions on the number of days that can be set, and based on the configuration, when a leave period is activated, the system will automatically re-assign active requests to other available Users applying the [Technician Assignment](#) logic. If the request was initially drawn from an Incident Queue, it will not return to the Queue but be reassigned to the most relevant Technician based on the Technician Assignment logic.

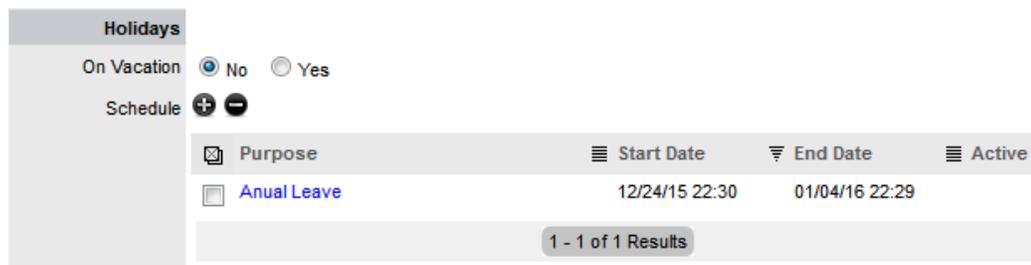
As a Supervisor User, to schedule User leave:

1. Go to the Users>User option
2. Select the hyperlink name of the User
3. Move to the Schedule tab
4. Click Edit, to activate edit mode
5. In the Schedule field, select 
The Vacation Details window is expanded.
6. Enter the reason for leave in the Purpose box



7. Complete the Start and End date details
8. Click Save.

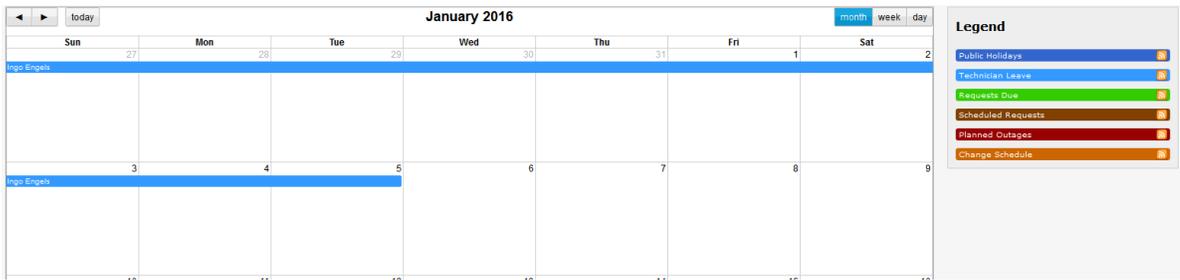
The details are recorded in the database and when the Start Date is reached, new requests will not be assigned to the User. After the scheduled End Date, the User account will be automatically re-activated.



Purpose	Start Date	End Date	Active
Annual Leave	12/24/15 22:30	01/04/16 22:29	<input checked="" type="checkbox"/>

NOTE: It should be noted that if the User on vacation is a Team Lead for any Teams where there are no Technicians available for new request assignment, the system will allocate new requests to the Team Lead, regardless of their vacation status.

The Supervisor Events calendar in the Home tab shows when Users are on Vacation:



Aliases Tab

NOTE: This is only applicable if the User has the Customer Role.

Use the Aliases tab to enter additional email addresses. The system creates requests from emails sent to the system account from a valid email address. Email addresses in the Aliases tab allow the User to send emails to the system account from more than one address. Notifications for requests created using an address in the Aliases tab, are sent to the main email address and cc'd to the alias address that was used to create the request.

When one or more alias email addresses have been created for a Customer, a Send To field is displayed on the Customer Information screen, which allows the most appropriate email address to be set as the default address applied to Customer correspondence. When the Send To field is set to an alias address the Primary Email address is not included in the cc list, unless specified in the request Information tab cc list.



To add an alias email address:

1. Select User>Users.
2. Click on the User name
The User Information screen appears.
3. Select the Aliases tab
4. Click Edit to access the Add button
5. Click Add
6. Enter an alias email address
7. Click Save.

When an alias email address has been created for a Customer, a Send To field is displayed on the Customer Information screen, which allows the alias email address to be set as the default address applied to Customer correspondence.

NOTE: An alias will only be used if the User has a Customer Role.

To remove an Alias Email Address, in Edit mode, tick the checkbox next to the Email Address and click the Remove button.

Team Tab

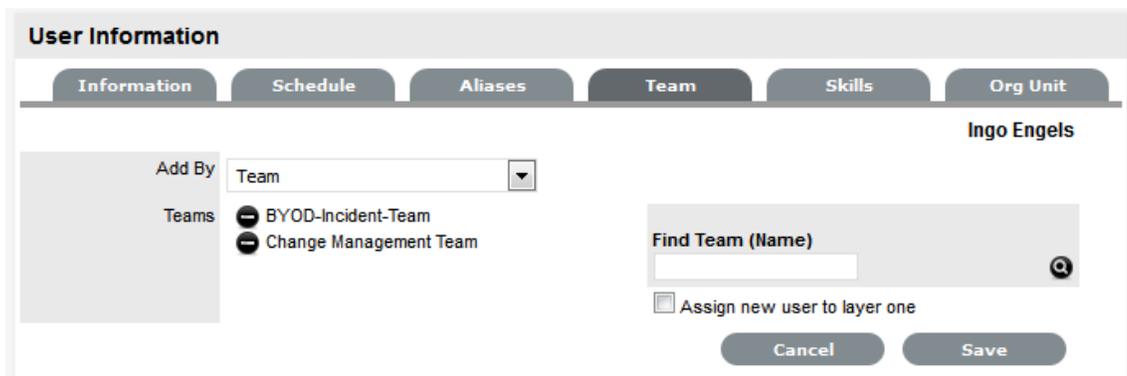
The User Team tab lists Teams associated with the selected User. Use this section to assign the User to one or more support Teams, making the additions by Team or job Assignment templates that have been configured in the system. Processes selected in the Information tab for the User determine the Teams available in the Team tab.

Once a User is assigned to the Team, the Supervisor must configure the escalation layers for the Team to include the new User. However, the User can easily be added to Layer One of escalation when associated with a new Team by ticking the Assign new users to layer one option when assigning the Team within this tab. Also, if Assignment templates are created in the system, by selecting Team Template, the User will automatically be added to Teams, Escalation Layers and Work Groups configured within the selected Template.

NOTE: The User must be assigned the relevant Processes for Support Teams to be shown in Team search results. If an Assignment template is selected and includes Teams for Processes the current User is not allocated, those Teams will not be included on the Template.

To add a User to a Team within the Team tab:

1. Click Edit



The screenshot shows the 'User Information' interface for 'Ingo Engels'. The 'Team' tab is selected. On the left, there is an 'Add By' dropdown menu set to 'Team' and a 'Teams' list with two items: 'BYOD-Incident-Team' and 'Change Management Team'. On the right, there is a 'Find Team (Name)' search field with a magnifying glass icon, a checkbox for 'Assign new user to layer one', and 'Cancel' and 'Save' buttons.

2. Using Add By Team, enter a Team Name in the Find Team field and click  or leave the field empty and click 

The Teams for Processes that the User is assigned are displayed in the search results.

3. Tick "Assign new user to layer one", if relevant
4. Select a Support Team link

The User is assigned to the Team and layer one of escalation if appropriate.

5. Click Save.

To add a User to a Team within the Team tab using Assignment templates:

1. Click Edit
2. Within the Add By field, select Team Template

Job Assignment Templates that have been configured in the User>Assignments tab are displayed, but only including Teams consistent with the Processes assigned to the User

The screenshot shows the 'User Information' screen with the 'Team' tab selected. The 'Add By' dropdown menu is set to 'Team Template'. Below it, the 'Templates' dropdown menu is empty. The user's name, 'Ingo Engels', is displayed in the top right corner. At the bottom right, there are 'Cancel' and 'Save' buttons.

3. Select one or more Template options
4. Click Save

The User is automatically included in the Teams, Escalation Layers and Work Groups configured in the Template.

The screenshot shows the 'User Information' screen with the 'Team' tab selected. The 'Add By' dropdown is set to 'Team Template' and the 'Templates' dropdown is set to 'New Template'. Below these, a table displays the following information:

Team Name	Layer
Portfolio	Management

A '1 - 1 of 1 Results' indicator is shown below the table. At the bottom right, there are 'Cancel' and 'Save' buttons.

To remove a User from a Team:

1. Select User>Users
The User Information screen appears.
2. Click on the name of the User
3. Select the Team tab
4. Click Edit
5. Select  to remove a Team assignment
6. Click Save
7. Click Done.

NOTE: If a User is the Team Lead or the only person assigned to an escalation layer they cannot be removed from a Team under this tab.

Skills Tab

Use this section to assign any specific Classifications that are to be handled by a Supervisor, Technician or Partner. This assignment assumes areas of expertise for Users assigned to these Classifications. This allows the system to automatically route requests logged against these Classifications to the most appropriate User.

NOTE: Prior to using the Skills tab, Items and Classifications should be configured.

Assigning a Classification

To assign a Classification:

1. Select User>Users>Skills
2. Click Edit to display the Add button
3. Click Add
4. Select the Item Category

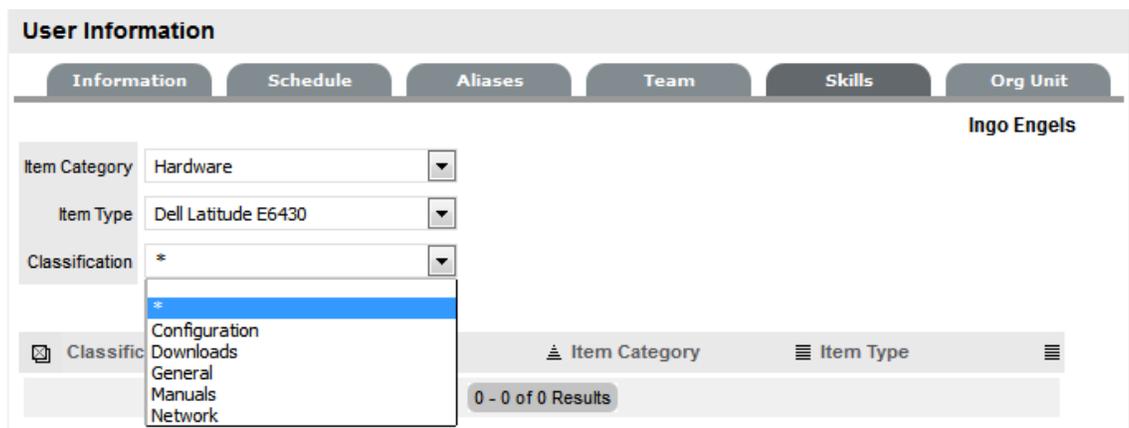
The Item Type and Classification Type drop-down list is displayed.



The screenshot shows the 'User Information' section for 'Ingo Engels'. The 'Skills' tab is active. The 'Item Category' dropdown is open, showing a list of categories. Below it are 'Cancel' and 'Save' buttons. A table with columns 'Classification', 'Item Category', and 'Item Type' is displayed, showing '0 - 0 of 0 Results'.

5. Choose an Item Type, if relevant
6. Select * to assign all Classifications as Skills or choose a specific Classification

The list displayed will include all Classifications configured for the Item Category and the Item Type, if an Item Type is selected.



The screenshot shows the 'User Information' section for 'Ingo Engels'. The 'Skills' tab is active. The 'Item Category' dropdown is set to 'Hardware', 'Item Type' is set to 'Dell Latitude E6430', and the 'Classification' dropdown is open, showing a list of classifications including '*', 'Configuration', 'Downloads', 'General', 'Manuals', and 'Network'. Below the dropdowns are 'Item Category' and 'Item Type' filters, and a table showing '0 - 0 of 0 Results'.

7. Click Save
8. Click Done.

NOTE: The Classification assigned to the User is either based on the Classifications of an Item Category or Item Type, hence displaying two columns. However, the Item Type column will only include information when the Classification selected is specific to that Item Type, and not directly related to the Item Category.

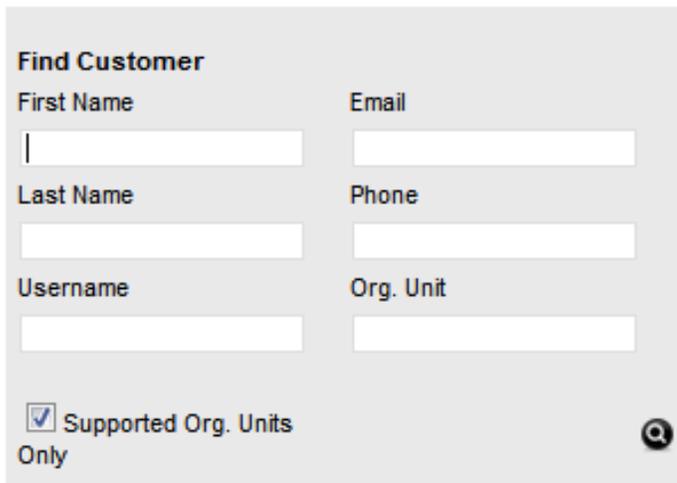
To remove a Classification:

1. Select User>Users
The User Information screen appears.
2. Click on the name of the User
3. In the Skills tab, click Edit
The Delete button appears at the bottom right.
4. Click the checkbox next to the Classification. Multiple Classifications can be checked
5. Click Remove
6. Click Done.

NOTE: The Classification assigned to the User is either based on the Classifications of an Item Category or Item Type, hence displaying two columns. However, the Item Type column will only include information when the Classification selected is specific to that Item Type, and not directly related to the Item Category.

Org Units

Use this section to assign one or more Org Units to a Supervisor, Technician or Partner, which will result in requests that are logged by these Org Units being routed to the assigned Users. When Users are assigned to support Organizational Units, the Find Customer option during the request creation process, displays the Supported Org. Units Only option. This limits the Customer search results to those Customers who belong to the Org. Units the logged in Technician is assigned to support.



The screenshot shows a search form titled "Find Customer" with the following fields:

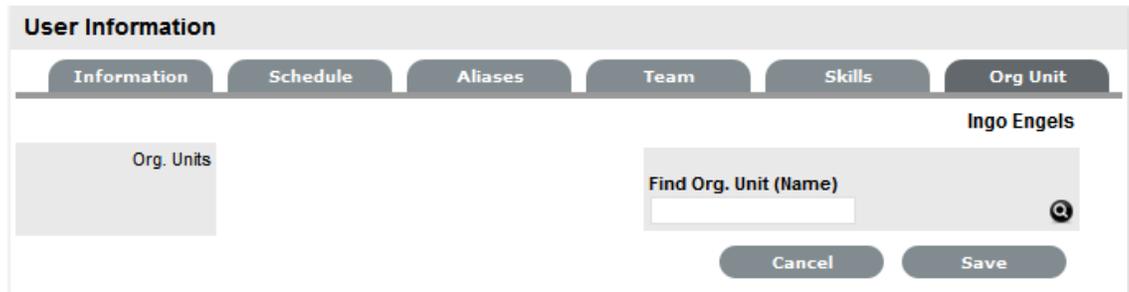
First Name	Email
<input type="text"/>	<input type="text"/>
Last Name	Phone
<input type="text"/>	<input type="text"/>
Username	Org. Unit
<input type="text"/>	<input type="text"/>

At the bottom left, there is a checked checkbox labeled "Supported Org. Units Only". At the bottom right, there is a magnifying glass icon.

Assigning an Org Unit

To assign an Org Unit:

1. Select User>Users>Org Units
2. Click Edit to display the Find Org. Unit search field
3. Enter any known Org Unit details or leave the field blank to return the full list of Org Units recorded in the system



The screenshot shows the 'User Information' interface for 'Ingo Engels'. It features several tabs: 'Information', 'Schedule', 'Aliases', 'Team', 'Skills', and 'Org Unit'. The 'Org Unit' tab is active. On the left, there is a box labeled 'Org. Units'. On the right, there is a search field labeled 'Find Org. Unit (Name)' with a magnifying glass icon. Below the search field are 'Cancel' and 'Save' buttons.

4. Click 
5. Click on the Org Unit name hyperlink to associate it with the User
Multiple selections may be made, if required.
6. Click Save.

Removing an Org Unit

To remove the association between a User and an Org Unit:

1. Select User>Users
The User Information screen appears.
2. Click on the name of the User
3. In the Org Unit tab, click Edit
4. Select  next to the relevant Org Unit
The Org Unit details are removed from the tab.
5. Click Save
6. Click Done.

2.8.5 Teams

- ◆ [“Unknown Team” on page 731](#)
- ◆ [“Creating an Incident or Problem Team” on page 732](#)
- ◆ [“Creating and Configuring Additional Escalation Layers” on page 736](#)
- ◆ [“Editing an Escalation Layer” on page 736](#)
- ◆ [“Configuration of Escalation Layers” on page 737](#)
- ◆ [“Creating a Service or Change Request Team” on page 737](#)
- ◆ [“Service Portfolio Team” on page 747](#)
- ◆ [“Release & Deployment Team” on page 751](#)

Technicians are allocated to Teams for the various support processes. For each Process (i.e., Incident, Problem, Change and Service Request) there must be at least one support Team.

Default Teams are assigned to specific Item Types. Support requests generated against an Item Type are then assigned to a Technician within the default support Team for that Process. The Team may be reassigned based on other options provided through the associated SLA(s) and Workflow(s).

Support Teams for Incident and Problem Management include escalation layers, and Technicians are assigned to each of these layers. Incidents and Problems follow the escalation path determined by the service level triggers assigned to the request. For a Technician to be able to edit a request, they must be a member of the assigned Team, although they do not need to be included in an escalation layer.

Service and Change Request Teams are built around the selected Workflow. Technicians are assigned to work groups and each State of the Workflow Lifecycle is associated with a selected work group. When a request moves to a next State, it is assigned to a Technician within the work group associated with that Workflow State. One or multiple levels of escalation can also be configured for the Workflow, which span the lifecycle of the Workflow the Service or Change Team are assigned.

A Service Portfolio Team can be configured in the system, assigning the Users who will manage the development, production and discontinuation of services offered to the organization.

Use this section to:

- ◆ Create new Incident and Problem Teams with escalation layers
- ◆ [Create Service and Change Request Teams with workflow assignments](#)
- ◆ [Create a Service Portfolio Team](#)
- ◆ [Create a Release and Deployment Team](#)

Team Name	Process	Lead Technician	OLAs	Incoming Email	Phone	Workflows	Layers
BYOD-Incident-Team	Incident	Joe K				Incident Workflow	1
Change Management Team	Change Request	Ingo Engels				Standard Change Workflow	2
Device-Incident Team	Incident	Sankar R				Incident Workflow	1
Problem Analysis Team	Problem	Sankar R				Problem Workflow	1
Service Request Team	Service Request	Vaibhav Jain				Service Request Workflow	2
Unknown	Incident	System Supervisor				Incident Workflow	1

1 - 6 of 6 Results

Unknown Team

By default the system includes the system Team, Unknown, within the Teams List. This is the Team used by the application for Incidents created via email. It can be configured to use the system email address or an email account that is an alias for the main system account and Technicians can be assigned like any other Incident Team.

NOTE: The Unknown Team should *NOT* be re-named and will *NOT* appear in any other Teams lists throughout the application, i.e., when assigning a Team to an Item or Item Type.

Creating an Incident or Problem Team

To create an Incident or Problem Team:

1. Select User>Teams
2. Click New
3. Enter the Team Name

4. Select Incident or Problem Process
5. Enter the Team email address, if relevant
6. Define the Team options

Options	Description
Team	Enter the Team Name. (Required.)
Process	Indicates if the Team is to manage Incidents or Problems.
Team Lead	The Technician assigned to supervise the Team and its activities. Options are visible when the Technicians have been assigned to the Team.

Options	Description
Incoming Email	Enter a specific Email Address for the Team, which allows Customers to use directly. This address will need to be configured as an alias to the system support address on the Email Server.
Email Display Name	If desired, enter a name for the Team that will be used in the From address for email responses sent by members of the Team.
Customer Notification	Sets the default notification method applied to requests for Customer correspondence, when requests are assigned to this Team. The Customer Defined option, derives the method of notification from the setting within the Customer's Profile or Account Information tab.
Technician Notification	Sets the default notification method applied to requests for Technician correspondence, when requests are assigned to this Team.
Live Priority	Routes requests to Technicians who belong to the Team and logged into the system.
Self Assign	When enabled, requests created by a Technician will automatically be assigned to that Technician.
Notify on New	Determines who is informed about the creation of a new request. <i>Technician</i> - notifies only the Technician assigned to the request. (This is the default setting.) <i>Layer</i> - notifies all members in Layer One of the Team assigned to the request. <i>Select Team</i> - notifies all technicians in the Team.
Notify on Update	Determines who is informed when a request is updated. <i>Technician</i> - notifies only the Technician assigned to the request. (This is the default setting.) <i>Layer</i> - notifies all members in Layer One of the Team assigned to the request. <i>Select Team</i> - notifies all technicians in the Team.
Notify on Escalate	Determines who is informed when a request is escalated. <i>Technician</i> - notifies only the Technician assigned to the request. (This is the default setting.) <i>Layer</i> - notifies all members in Layer One of the Team assigned to the request. <i>Select Team</i> - notifies all technicians in the Team.

Options	Description
Incident/Problem Queue	<p>Allows the Team to use a holding bay for Incidents/ Problems that are received via email or the Customer Portal. (This option is visible if it has been enabled by the Administrator.)</p> <p>If the Team has only one Technician assigned to Layer One of Escalation, new Incidents are automatically assigned to that Technician and that Technician is notified of the new Incident assignment.</p> <p>If the Team has multiple Technicians assigned to Layer One of Escalation, the new Incident is placed in the Queue (i.e., it is assigned to the System User) and all members of the Team are notified that a new Incident has been assigned to the Incident Queue.</p>
Queue Visibility	<p>When the Incident Queue is enabled, the option can be refined to allow the Queue to be available for assigned Workflow entry points, or all stages of the assigned Workflow. If All States is enabled, Users can move requests back to the Queue throughout the request lifecycle.</p>
Edit Assign	<p>When set to Yes and a request assigned to the System User (i.e., Queue) is opened in Edit Mode, the system will automatically assign the request to the User editing the request if they are in the Escalation Layer associated with the request.</p>
Close Assign	<p>When set to Yes and a request assigned to the System User (i.e., Queue) is moved to an Exit State of the Workflow, the system will automatically assign the request to the User who prompted the close action.</p>

7. Complete the Team Location details, if required

8. Select Technicians from the Available Technicians list

Highlight Technician names within the Available Technicians list and click the arrow icon to move the Users to the Selected Technicians list.

9. Click Next

The Service Screen displays all Available OLAs and Workflows

Team Information

Information | **Service** | **Layers**

Agreements

OLAs

Available OLAs
No OLAs available

Selected OLAs
None selected

Workflows

Workflows

Available Workflows

Incident Workflow

Selected Workflows
None selected

Default Workflow

Cancel Next

10. Assign the relevant OLAs within Available OLAs list (Optional)

Highlight the Team Name and click the arrow icon to move an OLA to Selected OLAs list. Assigning an OLA to the Team ensures the Team's details will be selectable when the assigned OLA is associated with a Workflow State.

11. Assign the relevant Workflows within the Available Workflow list

Highlight the Workflow Name and click the arrow icon to move the Workflow into the Selected Workflows list. Assigning Workflows to the Team ensures the Team is displayed as an option within the request Summary tab when the associated Workflows are assigned to a request.

12. If more than one Workflow is assigned, select a Default Workflow form the drop-down list

13. Select Next

The Escalation screen appears. This allows Escalation Layers and Technician assignment to be configured.

14. To edit the Default Layer, select the link

15. Move Technicians between the Available and Selected boxes and amend the Layer Name, if required

Team Information

Information | **Service** | **Layers**

Layer Name: Default layer

Technicians

Available Technicians

Ingo Engels

Selected Technicians

Craig Wilson

Cancel Save

16. Click Save
17. To create additional Escalation Layers, select New
By default the Team Lead will always be assigned to the Escalation Layer upon creation.
18. Click on the Layer link to edit the Technician assignment and Save



19. To delete a Layer, select the Layer Name
20. Click the Delete button and Save.

Creating and Configuring Additional Escalation Layers

Additional escalation levels can be created, if required. The order of the escalation pathway is determined by the order of creation. That is, layer one is entry level support, layer two is the next level of support and so on.

1. Select Team Information>Layers
2. Click Edit to display the New button
The Technicians who are assigned to the Team are displayed in the Available Technicians list
3. Add and/or remove Technicians from the Escalation Layer Members list
4. Click Save.



Editing an Escalation Layer

To edit an Escalation Layer with the Team Information screen in Edit mode:

1. Select the Layers tab
2. Click on the Layer name hyperlink
The list of available and assigned Technicians is displayed.
3. Remove and add Technicians, as required
Highlight the User Names within the relevant list and click the arrow to move the User to the required list.

The screenshot shows a web interface titled "Team Information" with three tabs: "Information", "Service", and "Layers". The "Layers" tab is active. On the right side, there is a "TeamSMG" label. The main area contains a form with the following elements:

- Layer Name:** A text input field containing "Default layer".
- Technicians:** A section with two lists:
 - Available Technicians:** A list box containing "Ingo Engels".
 - Selected Technicians:** A list box containing "Craig Wilson".
- Swap Function:** Between the two lists, there are two circular arrows pointing in opposite directions. A blue arrow points to them with the text "Click to swap users between Technicians lists".
- Buttons:** At the bottom right, there are three buttons: "Delete", "Cancel", and "Save".

4. Select Save.

Configuration of Escalation Layers

The following process is recommended for configuring Escalation Layers. Level one should contain the majority of Available Technicians who have been assigned to the Team. A smaller but more experienced group should be assigned to the second level. An even smaller and more experienced group should be assigned to the third level and so on until the final level of escalation. Ideally, the last layer should contain only the Team's Lead Technician.

There are no constraints to prevent individual Technicians from being assigned to more than one level. However, for a Technician to be able to edit a request they must be a member of the assigned Team, although they do not need to be included in an escalation layer.

To remove a User from a Team:

1. In the User tab, click Users
 - The User Information screen appears.
2. Click on the name of the User
3. Select the Team tab
4. Click on Edit
 - The Remove button is displayed.
5. Select the checkbox to the left of the Team Name
 - Multiple check boxes can be selected.
6. Select Remove to delete the User from a Team
 - The User Name is removed from the Team.
7. Click Done.

Creating a Service or Change Request Team

Service and Change Request Teams are built around the selected Workflow. Technicians and Managers are assigned to work groups and each State of the Workflow Lifecycle is associated with a selected work group. When a request moves to a next State, it is assigned to a Technician or Manager within the work group associated with that Workflow State. One or multiple levels of escalation can also be configured for the Workflow, which span the lifecycle of the Workflow the Service or Change Team are assigned.

Creating a Service Request or Change Team

To create a Service Request or Change Management Support Team:

1. Select User>Teams
2. Click New
3. Enter the Team Name
4. Select the Service or Change Request Process
5. Enter the Team email address, if relevant

Team Information

Information
Service

Details

Team Name

Process

Team Lead

Incoming Email

Email Display Name

Customer Notification

Technician Notification

Live Priority On Off

Self Assign On Off

Notify on New Technician Layer Team

Notify on Update Technician Layer Team

Notify on Escalate Technician Layer Team

Location

Address

City

State

Zip

Country

Phone

Members

Technicians

Available Technicians

Craig Wilson

Ingo Engels

Joe K

Kamal K

Sankar R

Vaibhav Jain

▶

Selected Technicians

None selected

Cancel
Next

6. Define the Team options:

Options	Description
Process	Indicates if the Team is to manage Change or Service Requests.
Team Lead	The Technician assigned to supervise the Team and its activities. Options are visible when the Technicians have been assigned to the Team.

Options	Description
Incoming Email	Enter a specific Email Address for the Team, which allows Customers to use directly. This address will need to be configured as an alias to the system support address on the Email Server.
Email Display Name	If desired, enter a name for the Team that will be used in the From address for email responses sent by members of the Team.
Customer Notification	Sets the default notification method applied to requests for Customer correspondence, when requests are assigned to this Team. The Customer Defined option, derives the method of notification from the setting within the Customer's Profile or Account Information tab.
Technician Notification	Sets the default notification method applied to requests for Technician correspondence, when requests are assigned to this Team.
Self Assign	When enabled, Requests created by a Technician will automatically be assigned to that Technician.
Notify on New	Determines who is informed about the creation of a new Request.
Notify on Update	<i>Technician</i> - notifies only the Technician assigned to the request. (This is the default setting.)
	<i>Layer</i> - notifies all members in Layer One of the Team assigned to the request.
	<i>Select Team</i> - notifies all members of the Team.
Notify on Escalate	Determines who is informed when a Request is updated.
	<i>Technician</i> - notifies only the Technician assigned to the request. (This is the default setting.)
	<i>Layer</i> - notifies all members in Layer One of the Team assigned to the request.
Notify on Escalate	<i>Select Team</i> - notifies all members of the Team.
	Determines who is informed when a Request is escalated.
	<i>Technician</i> - notifies only the Technician assigned to the request. (This is the default setting.)
Notify on Escalate	<i>Layer</i> - notifies all members in Layer One of the Team assigned to the request.
	<i>Select Team</i> - notifies all members of the Team.

Options	Description
Request Queue (Service Request Teams only)	<p>Allows the Team to use a holding bay for Requests that are received via email or the Customer Portal. (This option is visible if it has been enabled by the Administrator.)</p> <p>If the Team has only one Technician assigned to the work group associated with the Workflow Default Entry State, new Requests are automatically assigned to that Technician and that Technician is notified of the new Request assignment.</p> <p>If the Team has multiple Technicians assigned to the work group associated with the Workflow Default Entry State, the new Request is placed in the Queue (i.e., it is assigned to the System User) and all members of the Team are notified that a new Request has been assigned to the Request Queue.</p>
Queue Visibility (Service Request Teams only)	<p>When the Request Queue is enabled, the option can be refined to allow the Queue to be available for assigned Workflow entry points, or all stages of the assigned Workflow. If All States is enabled Users can move Requests back to the Queue throughout the Request lifecycle.</p>
Edit Assign (Service Request Teams only)	<p>When set to Yes and a request assigned to the System User (i.e., Queue) is opened in Edit Mode, the system will automatically assign the request to the User editing the request if they are in the Escalation Layer associated with the request.</p>
Close Assign (Service Request Teams only)	<p>When set to Yes and a request assigned to the System User (i.e., Queue) is moved to an Exit State of the Workflow, the system will automatically assign the request to the User who prompted the close action.</p>
Strong Authentication	<p>If the Manager User Name and Password is required to be re-entered during the processing of a Request in an Approval State, set this option to Yes.</p>

7. Complete the Team Location details, if required
8. Select Technicians from the Available Technicians list

Highlight Technician names within the Available Technicians list and click the arrow icon to move the Users to the Selected Technicians list.
9. Select Managers from the Available Managers list

This is required if a Manager is to be assigned to a [Workflow Approval State](#).

Highlight Manager names within the Available Managers list and click the arrow icon to move the Users to the Selected Manager list.
10. Click Next

The Service Screen displays all Available OLAs and Workflows

Team Information

Information Service Group States Layers

Change Management Team

Agreements
OLAs
Available OLAs
No OLAs available
Selected OLAs
None selected

Workflows
Workflows | Available Workflows
Change Deployment Workflow
Emergency Change Workflow
Typical Change Workflow
Selected Workflows
Standard Change Workflow

Default Workflow | Standard Change Workflow

Cancel Save

11. Assign the relevant OLAs within Available OLAs list (Optional)

Highlight the OLA and click the arrow icon to move an OLA to Selected OLAs list. Assigning an OLA to the Team ensures the Team's details will be selectable when the assigned OLA is associated with a Workflow State.

12. Assign the relevant Workflows within the Available Workflow list

Highlight the Workflow and click the arrow icon to move the Workflow into the Selected Workflows list. Assigning Workflows to the Team ensures the Team is displayed as an option within the Request Summary tab when the associated Workflows are assigned to a Request.

13. Select a Default Workflow from the drop-down list

This is relevant if more than one Workflow is assigned to the Change Team. The Default Workflow is automatically applied to an RFC that has been allocated to this Change Team.

14. Select Next

The Group tab displays the Default Technician Group and Default Manager Group. Within this tab multiple groups of Technicians and Managers can be created that are then associated with the relevant stages of the Workflow.

15. Click on the Default Group link

The Team Lead will automatically be applied to the Group. Rename the Work Group, if relevant. Highlight Technician names within the Available Technicians list and click the arrow to allocate the Technician to the Selected Technicians field.

Team Information

Information Service **Group** States Layers

Change Management Team

Group Name:

Group Type: Technician Manager

Technicians

Available Technicians:

Selected Technicians:

Delete Cancel Save

- Click Save
- Repeat the process for the Default Managers Group.

Team Information

Information Service **Group** States Layers

Change Management Team

Group Name:

Group Type: Technician Manager

Managers

Available Managers:

Selected Managers:

Delete Cancel Save

- Click New to create any additional Technician or Manager Groups

Team Information

Information Service **Group** States Layers

Group Name:

Group Type: Technician Manager

Technicians

Available Technicians:

Selected Technicians:

Cancel Save

- Click Save to save the details of a newly created Technician or Manager Group

Team Information

Information Service **Group** States Layers

Change Management Team

Groups

Name	Assigned Technicians	Assigned Managers	Group Type
Default Group	Ingo Engels		Technician
Default Manager Group		Senthil K	Manager
Group12		Scott Richards	Manager

1 - 3 of 3 Results

Cancel New Save

19. Click Next, when all Groups that are required for the Workflow have been created
- The Workflows/States of the Workflow Lifecycle are displayed with the system Default Group assigned to each State. The default Manager Group will be assigned to any Manager Approval States.

Team Information

Information Service **Group** States Layers

Change Management Team

Workflows [Standard Change Workflow](#)

States [Standard Change Workflow](#)

Name	Assigned Groups
Cancelled	Default Group
Cancelled - Unpaid	Default Group
Closed (Verified) - CAB	Default Group
Closed - Resolved	Default Group
On Hold	Default Group
On Hold - KBA Revise	Default Group
Open	Default Group
Pending	Default Group
Pending - CAB	Default Group
Pending - No Contract	Default Group

1 - 10 of 11 Results

Cancel Save

20. To assign a different Work Group to a Workflow State, click the state Name link

Team Information

Information Service Group States Layers

[Change Management Team](#)

Details

State Name Closed - Resolved

Group Default Group

Members

Technicians

Name	Account Type	Supervisor
Ingo Engels	Technician	Kamal K

1 - 1 of 1 Results

Cancel Save

21. Select the relevant Group from the drop-down list

22. Select Save

Repeat the Work Group assignment for each State, where relevant.

23. Click Next

The Layers tab is displayed, where one or more overarching layers of escalation can be applied to the Workflow.

24. Click on the Layer link to assign the relevant Users to the escalation layer and save

25. Click Save and Done.

To remove a User from a Team:

1. In the User tab, click Users

The User Information screen appears.

2. Click on the name of the User

3. Select the Team tab

4. Click on Edit.

The Remove button is visible.

Manager Approval State assignment

For a Manager User to be allocated the privilege of approving a Change or Service Request they must be assigned to a Change or Service Request Team and an Approval State of the relevant Change or Service Request Workflow. Change Workflows must include Approval States (i.e., States where activities are accepted or rejected) before the option to assign a Manager to a Change Team becomes available.

To assign a Manager to a Workflow Approval State:

1. Go to User > Teams

2. Select a Service or Change Request Team

Information Service Group States Layers

Duplicate Change Management Team

Details

Team Name | Change Management Team

Process | Change Request

Team Lead | Ingo Engels

Incoming Email |

Email Display Name |

Customer Notification | Email

Technician Notification | Email

Live Priority | On Off

Self Assign | On Off

Notify on New | Technician Layer Team

Notify on Update | Technician Layer Team

Notify on Escalate | Technician Layer Team

Strong Authentication | On Off

Members

Technicians |

Available Technicians

- Craig Wilson
- Joe K
- Kamal K
- Vaibhav Jain

▶

◀

▶

▶

Selected Technicians

- Sankar R
- Ingo Engels

Managers |

Available Managers

- Mike S

▶

◀

▶

▶

Selected Managers

- Selva K
- Senthil K
- Scott Richards

Location

Address |

City |

State |

Zip |

Country |

Phone |

Delete Cancel Save

3. In Edit mode, assign relevant Managers from the Available Managers list
 Highlight Manager names within the Available Managers list and click the arrow icon to move the Users to the Selected Manager list.
4. Go to the States tab

Team Information

Information Service Group States Layers

Change Management Team

Workflows Standard Change Workflow

States Standard Change Workflow

Default Manager Group is automatically applied to Workflow Approval States.

Name	Assigned Groups
Cancelled	Manager Approval Group
Cancelled - Unpaid	Default Group
Closed (Verified) - CAB	Default Group
Closed - Resolved	Default Group
On Hold	Default Group
On Hold - KBA Revise	Default Group
Open	Default Group
Pending	Default Group
Pending - CAB	Default Group
Pending - No Contract	Default Group

1 - 10 of 11 Results

Cancel Save

5. Select a Workflow

The Default Manager Group, which may have been re-named, is automatically assigned to all Approval States of the selected Workflow.

- 6. To adjust the assigned Manager Group, select the Approval Workflow State link
- 7. Select the Manager Group from the drop-down list and save
- 8. Click Save and Done.

Layers Tab

Requests moving through Service or Change Request Workflows can be escalated to the Team Lead or Supervisor User at any stage of the Workflow that is configured as a Manager Approval State. This action can be achieved by using the Escalate button within the Summary tab of the Request.

By default escalation layers are created with the Team Lead assigned. To amend or add to the assignment:

- 1. Go to User > Teams
- 2. Select a Service or Change Request Team
- 3. Click Edit
- 4. Select the Layers tab
- 5. Click on the Layer hyperlink

Team Information

Information Service Group States Layers

Change Management Team

Layer Name: Layer 2

Technicians

Available Technicians: Sankar R

Selected Technicians: Ingo Engels

Delete Cancel Save

6. Amend the assignment, as required
7. Click Save
 - If additional escalation layers are required, select New and repeat steps 5 to 7.
8. Click Done when all required escalation layers are configured.

Service Portfolio Team

The Service Portfolio Team is responsible for overseeing the creation and publication of all service offerings in the Service Portfolio, which include:

- ◆ Services under development
- ◆ Services in production and operation, stored in the Service Catalog.
- ◆ Retired and discontinued services.

Working with Service Portfolio Teams

To maintain control of the creation, editing and deletion of Service Items within the CMDB, Service Portfolio Teams can be assigned to Service Category templates. Included within these Teams are Groups of Users who are responsible for managing Item information at the various stages of the Service Lifecycle.

Category

Name: Peripherals

Service Category

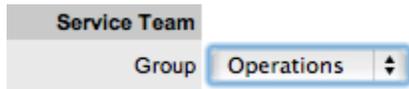
Description

Item No. Validation: Yes No

Icon



When Service Portfolio Teams are configured within the application, the option to assign a Service Portfolio Team is displayed within Service Category templates in the Configuration>Categories tab. This allows for the Groups that are created within the Team, to be assigned to the different Category Lifecycle States included in the Lifecycle Map displayed in the Item Categories>Life Cycle tab.



Assigning Groups to Category Lifecycle States allows the Users within the Group to edit the details of an Item when it is assigned that stage of the Category Lifecycle.

NOTE: When creating the Teams, it is suggested that the Group names reflect the stage of the Service Lifecycle, for instance Service Design, Service Implementation, Service Operation, Service Quality Control and Catalog Management.

Creating a Service Portfolio Team

To create a Service Portfolio Team:

1. Select User>Teams
2. Click New
3. Enter the Team Name
4. Select the Service Portfolio Process

Team Information

Information
Service

Details

Team Name

Process

Team Lead

Incoming Email

Email Display Name

Customer Notification

Technician Notification

Live Priority On Off

Self Assign On Off

Notify on New Technician Layer Team

Notify on Update Technician Layer Team

Notify on Escalate Technician Layer Team

Location

Address

City

State

Zip

Country

Phone

Members

Technicians

Available Technicians

- Craig Wilson
- Ingo Engels
- Joe K
- Kamal K
- Sankar R
- Vaibhav Jain

▶

Selected Technicians

None selected

Cancel
Next

5. Complete the Team Location details, if required

6. Select Technicians from the Available Technicians list

Highlight Technician names within the Available Technicians list and click the arrow icon to move the Users to the Selected Technicians list.

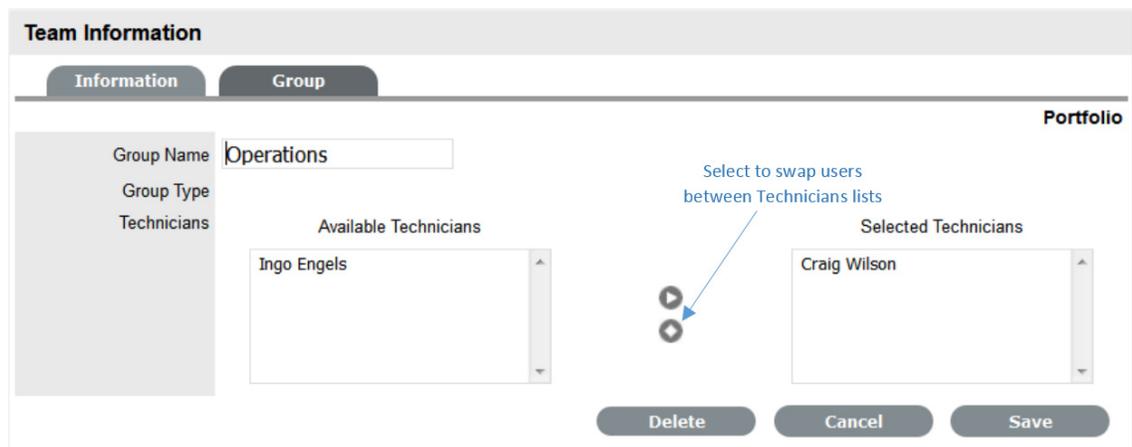
7. Set the Team Lead

8. Click Next

The Service Screen moves to the Group tab where the Users are assigned the various Groups that are provided the privilege of managing Item information and lifecycle status as part of managing the Service Portfolio. Some suggested Groups include Service Design, Service Implementation, Service Operation, Service Quality Control and Catalog Management.



9. For each Group link, click to assign Users to the Team
10. Move Technicians between the Available and Selected boxes



11. Select Save
12. Click New, to add other Groups to the Team
Assign Users as required and Save.
13. Click Done.

Removing Team Members from a Group

To remove a User from a Group, with the Team Information screen in Edit mode:

1. Click on the Group Name hyperlink
The lists of Available and Selected Technicians are displayed.
2. Remove and add Technicians, as required
3. Select Save.

Removing a User from a Team

To remove a User from a Team:

1. In the User tab, click Users
The User Information screen appears.

2. Click on the name of the User
3. Select the Team tab
4. Click on Edit
 - The Remove button is displayed.
5. Select the checkbox to the left of the Team
6. Click Remove.

If the User is not the only person assigned to an escalation layer of the selected Team, the User will be successfully removed from the Team.

Release & Deployment Team

The Release & Deployment Team is responsible for the planning, scheduling and controlling of changes and updates from Test to Live environments.

Release Managers, as part of a Release Team, direct the process using all information presented to help assess release readiness, and to efficiently identify deployment targets for the deployment phases of a release. This level of control guarantees the Release Manager can deliver updates to the live environment successfully, to all relevant parties, on time.

The Deployment component of the Release Team covers the activities or tasks responsible for moving new or changed hardware, software, documentation and process to the Live Environment.

Working with Release Management Teams

To plan, schedule and control changes and updates from Test to Live environments, Release Management Teams are assigned to Releases within the Change>Releases tab. Included within these Teams are Groups of Users who are responsible for managing the various stages of the Release Lifecycle.

Details	
Name	<input type="text"/>
Priority	Low <input type="button" value="v"/>
Team	<input type="text"/> <input type="button" value="v"/>
Group	
Workflow	<input type="text"/> <input type="button" value="v"/>

When Release Teams are configured within the application, Technicians with the Release and/or Deployment Process are associated with the Team. Managers with the Release Process are assigned to the Approval States of the Release Workflow. Technicians assigned the Release Process can be assigned to States of the Release Workflow, while Technicians only assigned the Deployment Process are placed in the Deployment Group and are responsible for completing the Deployment Tasks created for a Release.

Creating a Release & Deployment Team

To create a Release and Deployment Team:

1. Select User>Teams
2. Click New

3. Enter the Team Name
4. Select the Release Process

Team Information

Information
Service

Details

Team Name

Process

- Service Request
- Incident
- Problem
- Change Request
- Release
- Service Portfolio

Team Lead

Incoming Email

Email Display Name

Customer Notification

Technician Notification

Live Priority On Off

Self Assign On Off

Notify on New Technician Layer Team

Notify on Update Technician Layer Team

Notify on Escalate Technician Layer Team

Location

Address

City

State

Zip

Country

Phone

Members

Technicians

Available Technicians

- Craig Wilson
- Ingo Engels
- Joe K
- Kamal K
- Sankar R
- Vaibhav Jain

▶

Selected Technicians

None selected

Cancel
Next

5. Complete the Team Location details, if required
6. Select Technicians from the Available Technicians list

The Technician List consists of Users assigned the Release and/or Deployment Process in their User Information screen.

Highlight Technician names within the Available Technicians list and click the arrow icon to move the Users to the Selected Technicians list.

NOTE: Technicians with the Release Process will be available for assignment within the Release Workflow States in the Team Information>States tab

Technicians only assigned the Deployment Process will be available for assignment to the Deployment Group, who will complete the Deployment Tasks generated as part of the Release.

1. Set the Team Lead

The Team Lead options are drawn from the Assigned Technicians who are assigned the Release Process.

2. Select Managers from the Available Managers list

The Manager List consists of Users assigned the Release Process in their User Information screen.

Highlight Manager names within the Available Managers list and click the arrow icon to move the Users to the Selected Managers list.

3. Click Next

The Information screen moves to the Service tab where the Release Workflows are associated with the Team.

The screenshot shows the 'Team Information' screen with the 'Service' tab selected. The 'Workflows' section is active, showing a list of 'Available Workflows' (currently empty with the text 'No Workflows available') and a 'Selected Workflows' list containing 'Release Workflow'. A 'Default Workflow' dropdown menu is also set to 'Release Workflow'. At the bottom right, there are 'Cancel' and 'Next' buttons.

4. Move the relevant Available Workflows to the Selected Workflows field

5. Set the Default Workflow

If a single Workflow is assigned to the Team it is automatically applied as the Default Workflow.

Assigning Workflows to the Team ensures the Team is displayed as an option within the Deployment Summary tab when the associated Workflows are assigned to a Task.

6. Click Next

The screen defaults to the Groups tab that lists the default deployment, manager and release Groups. The Groups automatically apply the Team Lead to the Groups and require additional Technician and User assignments.

7. Select the Default Deploy Group

The Group Name can be edited and the Available Technicians and Selected Technicians fields are now accessible. As a Deployment Group Type, this group of Users will be available for assignment for Deployment Tasks created as part of a Release Workflow.

8. Rename the Group, if relevant

9. Move the relevant Users between the Available and Selected boxes

The Users displayed in the Available Technicians list have been assigned the Deployment Process in their User Information screen.

Team Information

Information Service Group States Release T

Group Name:

Group Type: Technician Manager Deployment

Technicians

Available Technicians:

Selected Technicians:

Delete Cancel Save

10. Select Save

11. Edit the assigned Users in the Manager and Release Groups

The default Manager Group will be automatically applied to all Approval States of the Release Workflow. The Release Group of Technician Users will be automatically applied to all non-approval States of associated Release Workflows. These assignments can be edited within the States tab.

12. Create additional Manager, Release or Deployment Groups, if relevant

Information Service Group States Release T

Groups

Name	Assigned Technicians	Assigned Managers	Group Type
Default Deploy Group	Ingo Engels Craig Wilson		Deployment
Default Manager Group		Mike S	Manager
Default Release Group	Craig Wilson		Technician

1 - 3 of 3 Results

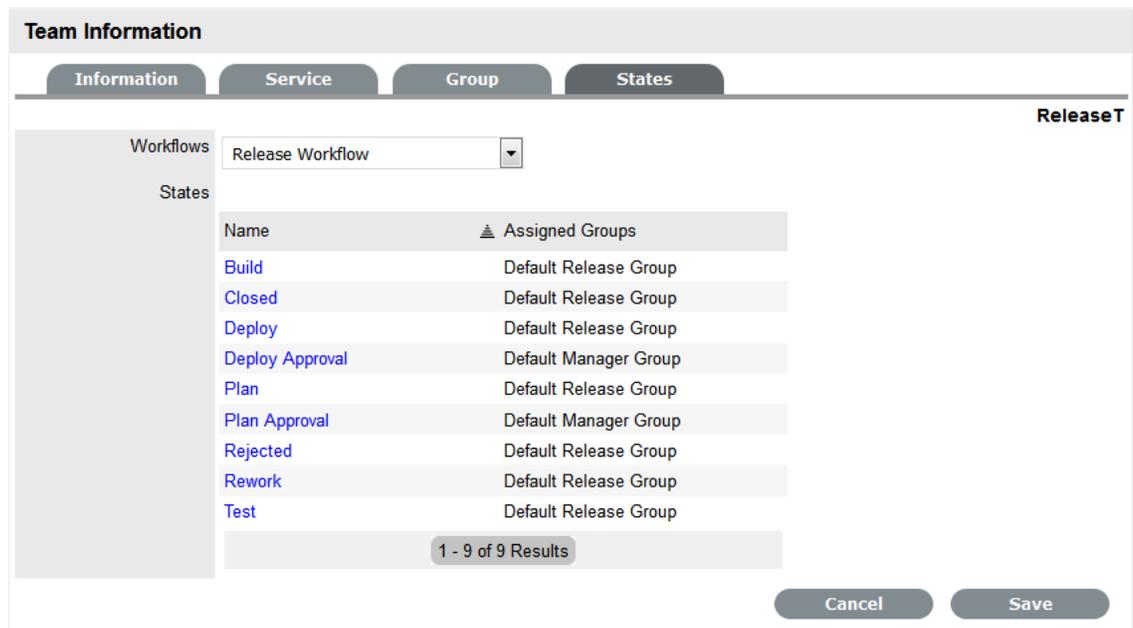
Cancel New Next

13. Click Next

The system moves to the States tab to display the list of Workflows associated with the Team, and the list of States included in the selected Workflow.

14. Select a State link to amend the assigned Work Group

15. Assign the relevant Group of Users to the Workflow State



16. Click Save and continue to adjust all the relevant assignments
17. Click Save
18. Click Done.

The Release & Deployment Team is fully configured.

Removing Team Members from a Group

To remove a User from a State or Group, with the tab in Edit mode:

1. Click on the State or Group Name hyperlink to display the list of available and assigned Technicians
2. Remove and add Technicians, as required
3. Select Save.

Removing a User from a Team

To remove a User from a Team:

1. In the User tab, click Users
 - The User Information screen appears.
2. Click on the name of the User
3. Select the Team tab
4. Click on Edit
 - The Remove button is displayed.
5. Select the checkbox to the left of the Team
6. Click Remove.

If the User is not the only person assigned to an escalation layer of the selected Team, the User will be successfully removed from the Team.

2.8.6 Assignments

- ♦ “Creating an Assignment Template” on page 756
- ♦ “Editing an Assignment Template” on page 758
- ♦ “Deleting an Assignment Template” on page 760
- ♦ “Applying Assignment Templates to New Users” on page 761
- ♦ “Applying Assignment Templates to Existing Users” on page 761

The Assignments tab allows job function templates to be created for new and existing Technician Users. Users can be assigned to multiple Teams, Escalation Layers and, for new Users, Processes by applying the templates. Administrator and Supervisor Users can apply these templates within the User Information screen for new Users, and the Team tab of the User Information screen for existing Users who are assigned the relevant Processes.

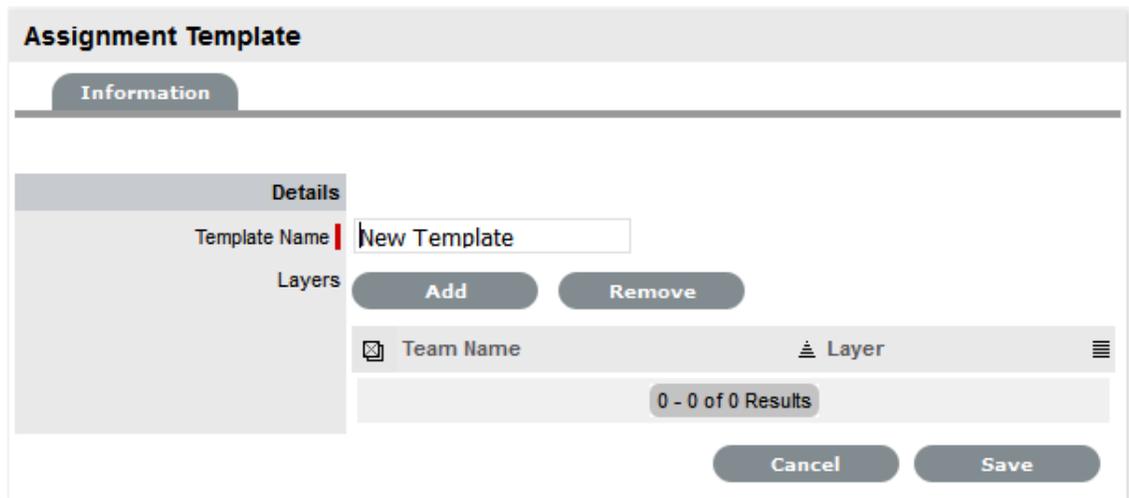
For example, a Frontline Support template may be created, where a User is assigned to Layer 1 of an Incident Team and a Work Group of a Service Request Team. They may also be assigned to an Update Customer Group within a Change Management Team. This template could then be easily applied to all Users created directly in the system, within the User Information screen. Or, if the User was created using an authentication server, the template could be applied within the Team tab of the User Information screen.

Creating an Assignment Template

Before creating an Assignment template, be sure all the relevant Teams and Escalation Layers or Groups exist in the system. However, should you create additional Teams, Escalation Layers or Groups at a later date, the Assignment template can easily be updated.

To create an Assignment Template:

1. Select User>Assignments
2. Click New

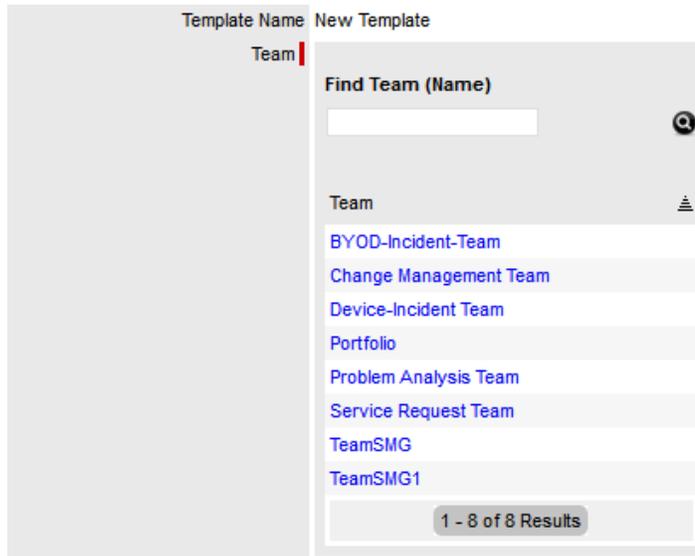


The screenshot shows the 'Assignment Template' creation interface. At the top, there is a header 'Assignment Template' and a sub-header 'Information'. Below this, there is a 'Details' section with a 'Template Name' field containing 'New Template'. Underneath, there is a 'Layers' section with 'Add' and 'Remove' buttons. A table below shows columns for 'Team Name' and 'Layer', with a search icon and a '0 - 0 of 0 Results' indicator. At the bottom, there are 'Cancel' and 'Save' buttons.

3. Enter the Template Name
4. Click Add

The Find Team editor is displayed.

5. Enter a Name to find a specific Team, or leave the field blank to return a list of all Teams and click 



Template Name New Template

Team

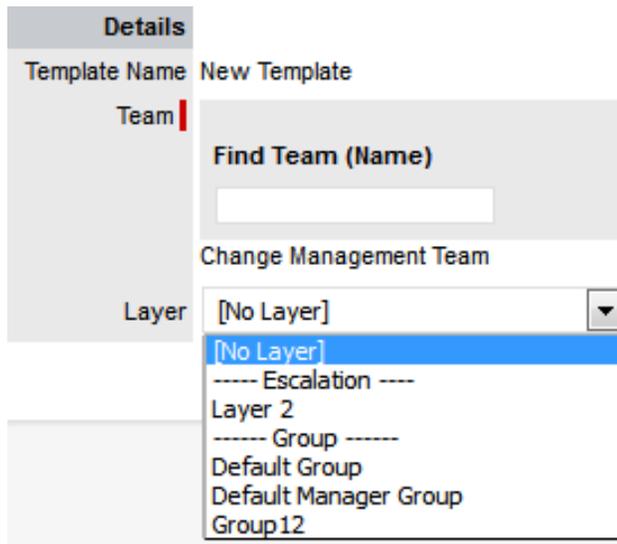
Find Team (Name)

Team

- BYOD-Incident-Team
- Change Management Team
- Device-Incident Team
- Portfolio
- Problem Analysis Team
- Service Request Team
- TeamSMG
- TeamSMG1

1 - 8 of 8 Results

6. Select the Team name link
The Layer or Groups drop down list is displayed.
7. Select an option from the available list



Details

Template Name New Template

Team

Find Team (Name)

Change Management Team

Layer

[No Layer]

- [No Layer]
- Escalation -----
- Layer 2
- Group -----
- Default Group
- Default Manager Group
- Group12

8. Click Save
9. Repeat steps 4 to 8, until all relevant assignments have been created for the template

Assignment Template

Information

Details

Template Name

Layers

<input checked="" type="checkbox"/>	Team Name	Layer
<input type="checkbox"/>	Portfolio	Management

1 - 1 of 1 Results

10. Click Save.

The template is now available within the User Information screen for new User creation, or the Teams tab for existing Users.

Editing an Assignment Template

To make changes to an existing User Assignment template, such as adding or removing Teams and the related Layer or Group assignment:

1. Select User>Assignments

Assignments

Display: 10 ▼

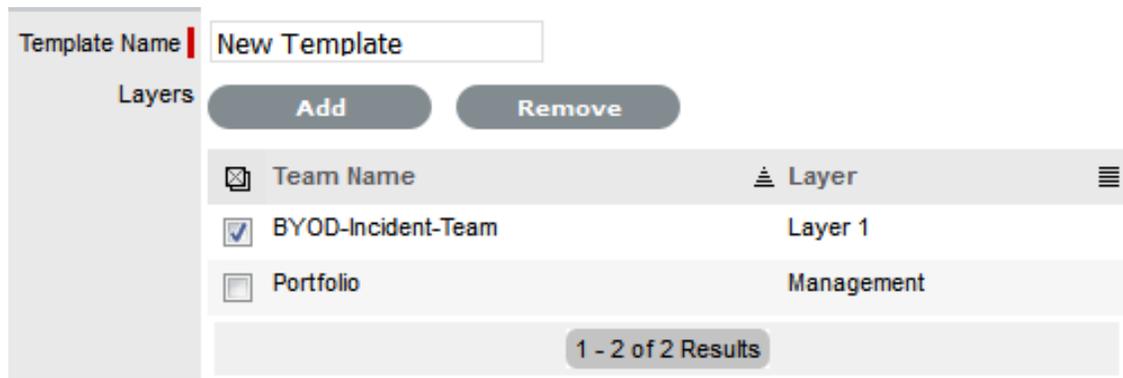
Template Name	Owner	Teams	Layers
New Template	Kamal K	1	1

1 - 1 of 1 Results

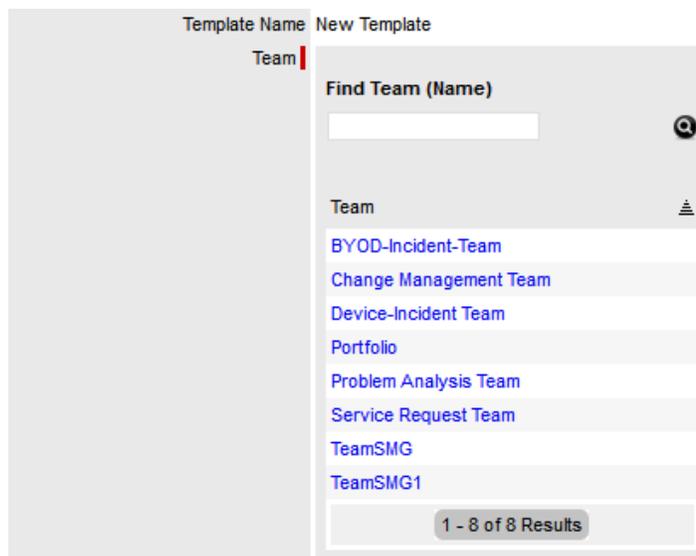
2. Click on the relevant Template Name hyperlink

3. Click Edit

4. To remove a Team/Layer association, check the box next to the Team Name



5. Click Remove
6. To add a Team/Layer association, click Add
7. Enter a Name to find a specific Team, or leave the field blank to return a list of all Teams and click 🔍



8. Select the Team name link
The Layer or Groups drop down list is displayed.
9. Select an option from the available list

Details

Template Name New Template

Team

Find Team (Name)

Change Management Team

Layer [No Layer]

- [No Layer]
- Escalation ----
- Layer 2
- Group -----
- Default Group
- Default Manager Group
- Group12

10. Click Save
11. To save all changes, click Save.
The screen defaults to the Assignments list view.

Deleting an Assignment Template

To delete an Assignment template from the system:

1. Select User>Assignments
2. Click on the relevant Template Name hyperlink
3. Click Edit
4. Select Delete

A warning message is displayed.

Details

Template Name | New Template

Layers

Add Remove

<input type="checkbox"/>	Team Name	Layer
<input type="checkbox"/>	BYOD-Incident-Team	Layer 1
<input type="checkbox"/>	Portfolio	Management
<input checked="" type="checkbox"/>	TeamSMG	Default layer

1 - 3 of 3 Results

Delete Cancel Save

5. Click OK.

The screen defaults to the Assignments list view.

Applying Assignment Templates to New Users

For new Users created directly in the system, the Assignment template is available within the User Information screen. By selecting a template, the newly created User is automatically associated with all relevant Processes, Teams, Escalation Layers and Groups. To remove a Team assignment after a template has been applied during the new User creation, deselect the Process and the Team Name will be removed from the assigned list.

To use an Assignment template for a new User:

1. Select the User>Users tab
2. Click New
3. Enter the User details
4. Within the Assignment Template field, select the relevant option

All Processes are automatically ticked for the User.

The screenshot shows a portion of a user creation form. On the left, there is a vertical sidebar with labels: 'Roles', 'Default Portal', 'Assignment Template', and 'Operations Processes'. The 'Roles' section is a grey box containing checkboxes for Supervisor, Administrator, Customer, Technician (checked), Manager, Partner, and Finance. The 'Default Portal' is a dropdown menu set to 'User Portal'. The 'Assignment Template' is a dropdown menu set to 'Service Desk Tech', with a list of options below it: 'Developer' (highlighted in blue) and 'Service Desk Tech'. To the right of the 'Operations Processes' label, there is a checkbox labeled 'Problem'.

5. Uncheck any Processes that are to be removed for the User
The Team association will automatically be removed from the Team Name list.
6. Complete remaining User details, including assigning a Supervisor and Email address
7. Click Save.

Applying Assignment Templates to Existing Users

For Users who have active accounts in the system and are assigned the relevant Processes, the Assignment template is available within the Team tab of the User Information screen.

To apply a template to an existing User:

1. Go to User>Users
2. Select the Technician Name hyperlink
3. Click Edit
4. Verify the User has all the relevant Processes with the User Information screen
5. Select the Team tab
6. Within the Add By field, select the Team Template option

The drop down list of Templates is made available.

The screenshot shows the 'User Information' form with tabs for Information, Schedule, Aliases, Team, Skills, and Org Unit. The 'Add By' dropdown is set to 'Team Template'. The 'Templates' dropdown is open, showing 'New Template' and 'R&D Template' (highlighted in blue). The name 'Ingo Engels' is visible in the top right, and 'Cancel' and 'Save' buttons are at the bottom right.

7. Select the relevant Template from the list
8. Click Save.

The screenshot shows the 'User Information' form with the 'Add By' dropdown set to 'Team Template' and the 'Templates' dropdown set to 'New Template'. Below the dropdowns, a search results table is displayed with the following content:

Team Name	Layer
Portfolio	Management

A '1 - 1 of 1 Results' indicator is shown below the table. The 'Cancel' and 'Save' buttons are at the bottom right.

2.9 Knowledge

- ♦ Section 2.9.1, “Knowledge Management,” on page 763
- ♦ Section 2.9.2, “Content Approval Process,” on page 763
- ♦ Section 2.9.3, “Articles,” on page 778
- ♦ Section 2.9.4, “Knowledge Base Search,” on page 785
- ♦ Section 2.9.5, “Frequently Asked Questions (FAQs),” on page 788
- ♦ Section 2.9.6, “Article Groups,” on page 791
- ♦ Section 2.9.7, “Forums,” on page 796
- ♦ Section 2.9.8, “Surveys,” on page 802
- ♦ Section 2.9.9, “Surveying Customer Sentiment,” on page 810

2.9.1 Knowledge Management

Knowledge Management falls within the realm of Service Transition. Within an Organization it is the Process responsible for gathering, analyzing, storing and sharing knowledge and information. Its main role is to improve service management efficiency by reducing the need to rediscover knowledge.

To this end, the system includes the Knowledge Base as an integral part of the Configuration Management System, using the Classifications, Categories and Types of the CMDB as the filing system for all Knowledge Base Articles. Therefore, when new requests are logged with the Service Desk, the system automatically searches through its information store for any Articles related to the current issue.

The Knowledge Base includes a variety of Article types. These are defined as:

Article Type	Description
Article	A reference document for general information.
FAQs	Frequently Asked Questions.
Solution	Created within a request to resolve a specific issue. Solutions are allocated an Assigned Request status, and can only be viewed by Users and Owners/ Customers of the Item associated with the request.
Workaround	Created within an Incident or Problem, to provide a possible workaround for a specific request.
Backout Procedure	Created within Change Request as a fallback plan for withdrawing a change procedure.

NOTE: The privilege to create, edit, delete and publish Articles is defined for Users within the User Information screen

For information regarding the implementation of the Knowledge Base content approval process, see: [KBA Approval Process](#).

2.9.2 Content Approval Process

KBA Requests for Approval

To guarantee the validity of content within the Knowledge Base (KB), Organizations can enable the KB control setting within the Administrator portal.

When the Control KBA via Request option is enabled in the Setup>Privileges>Request tab, KB content with a Pending Publication status automatically generates a Request that requires approval by Users with publishing privileges, before the content is accessible in the Knowledge Base.

When the User has completed the content and the Article is ready for publication, it is moved to the Article Status of Pending Publication, which results in the generation of a Request. When the KBA is moved to the Pending Publication state, the content of the Article can no longer be edited.

Published KBA content that is edited, also results in generating a Request for approval but the Article retains its published state and displays the pre-edited content. Upon approval of the new content, the Article is updated.

Setup KBA Approval Process

Requests generated as part of the KB content control process are managed like all other Requests in the system. This means, when a change is made to KB content, be it all new or edited material, a Request is created that must have an SLA assigned to it, to ensure a Workflow and Team manage the process efficiently.

NOTE: Prior to enabling the Control KBA via Request process, define an SLA (For the example below, the KBA Approval SLA was created in the system.)

Steps to set-up KBA Approval Process

The following steps are to be completed to implement the KBA Approval process:

1. Supervisor User: Define the SLA to manage the process
See: [SLAs](#).
2. Administrator User: Enable the "Control KBA by Request" option
Refer below.
3. Supervisor User: Define a KBA Workflow
Refer below.
4. Supervisor: Create KBA Approval Team and assign Workflow States.
See: [Creating Request Teams](#)

Enable KBA Control

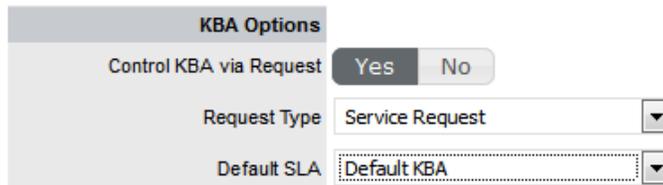
To enable the approval process, as an Administrator:

1. Go to Setup> Privileges >Requests tab
2. Select Yes to enable the option
3. Define the Request Type

The Request Type defined here determines the type of Request that is generated when new content is added to the Knowledge Base. The options displayed are based on the licenses owned. That is, if Change Management and Request Fulfillment licenses are used in the system, both options will be displayed.

4. Set the Default SLA

As Requests are managed based on the SLA assigned to them, setting the default SLA for the KB content control process determines the Team and Workflow options for the Requests created as a result of the KB change.



The screenshot shows a configuration window titled "KBA Options". It contains three settings:

- Control KBA via Request:** A toggle switch with "Yes" selected and "No" unselected.
- Request Type:** A dropdown menu with "Service Request" selected.
- Default SLA:** A dropdown menu with "Default KBA" selected.

5. Select Save.

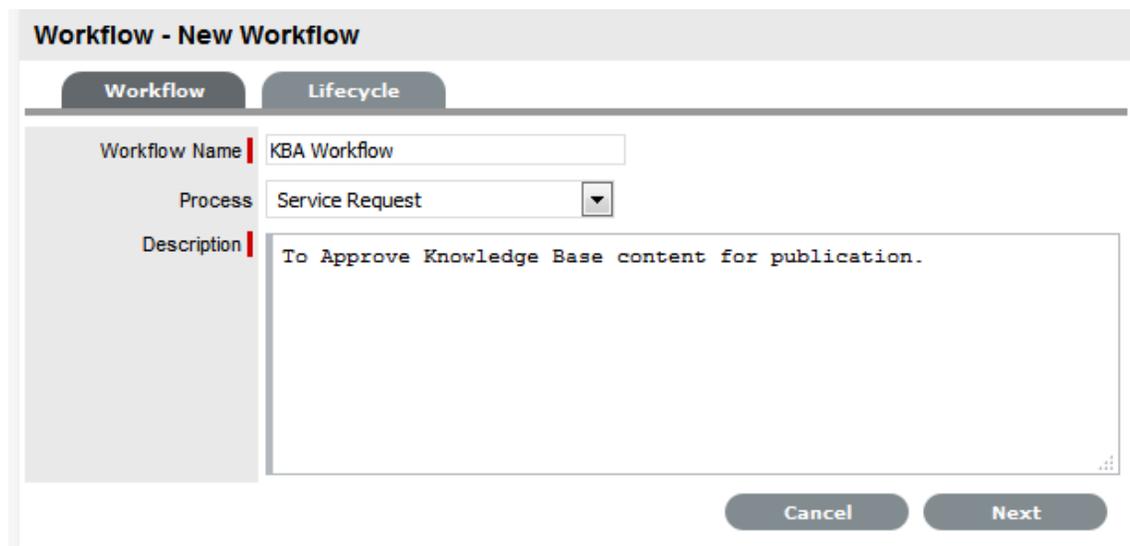
NOTE: When this option is enabled, the On Hold - KBA Rework is activated for KBA Approval Workflows. This State is not visible within the Workflow as it used by the system when the Revise button is selected within a KBA Approval State. It can be re-named within the Workflow State list, but cannot be customized.

Build the KBA Approval Workflow

The Workflow built to manage the approval process should use the Process that is defined as the Request Type in the Administrator Setting for this process. (The example outlined below uses the Service Request Workflow.)

To create the Workflow, as a Supervisor:

1. Select Service > Workflows
2. Click New



The screenshot shows a web form titled "Workflow - New Workflow". It has two tabs: "Workflow" (selected) and "Lifecycle". Under the "Workflow" tab, there are three input fields: "Workflow Name" containing "KBA Workflow", "Process" with a dropdown menu set to "Service Request", and "Description" containing "To Approve Knowledge Base content for publication.". At the bottom right of the form are two buttons: "Cancel" and "Next".

3. Enter the Workflow Name, define the Process and enter the Description
4. Search and select the KBA Approval SLA
The Default Open Status and Default Closed Status are to be defined after the Lifecycle is built.
5. Click Save
6. Move to the Lifecycle tab

Within this tab the Lifecycle of Pending Publication>KBA Approval>Approved Published/Content Rejected is to be built. Firstly the Pending State will be renamed to Pending Publication, the KBA Approval State will be created, Closed Resolved will be re-named to Approved Published and Cancelled will be renamed to Content Rejected.

NOTE: Default Entry States can be removed from the Lifecycle by opening the State and defining them as neither an Entry Point nor an Exit Point and not mapping Previous or Next States

7. Click the Pending State
This is an Active State defined as the Workflow Entry Point.
8. Set the Name to Pending Publication

If SLA targets are to be monitored and triggers fired when the Request is assigned this Status, set the SLA Active option to Yes. The Next State will be allocated when it is created.

Workflow - KBA Workflow

Status

Name: Pending Publication

Active State: Yes No

Item Editable: Yes No

Entry Point:

Exit Point:

Has Notes:

Listener Class:

Service

SLA Active: Yes No

SLA Restoration: Yes No

SLA Resolution: Yes No

Contract Type: None OLA Underpinning Contract

Previous States

Lifecycle entry points do not have 'previous' states

Next States

Available states

- Cancelled
- Cancelled - Unpaid
- Closed - Resolved
- In Progress
- On Hold - Pending Approval
- Open

Selected states

None selected

Cancel Save

9. Click Save
10. Select New, to create the Approval State

For this example, the State will be labeled KBA Assessment and the KBA Approval option is set to Yes. This will remove the Next State option and replace it with the Accept State and Reject State drop-down list. For this example, set Pending Publication as the Previous State, Cancelled as the Accept State and Closed-Resolved as the Reject State.

Workflow - KBA Workflow

Workflow Lifecycle Status

Status

Name | KBA Assessment

Active State Yes No

Approval State Yes No

Item Editable Yes No **Set the KBA Approval option to Yes. (The Approval State option will become non-editable.)**

KBA Approval Yes No

Has Notes

Listener Class

Service

SLA Active Yes No

SLA Restoration Yes No

SLA Resolution Yes No

Contract Type None OLA

Previous States

Available states

- In Progress
- On Hold - Pending Approval
- On Hold - Process Escalated
- Open
- Pending - No Contract
- Pending Publication

Selected states

None selected

Accept State

Status Cancelled **The State will be re-named to Approved Published**

Reject State

Closed - Resolved **The State will be re-named to Content Rejected.**

Cancel Save

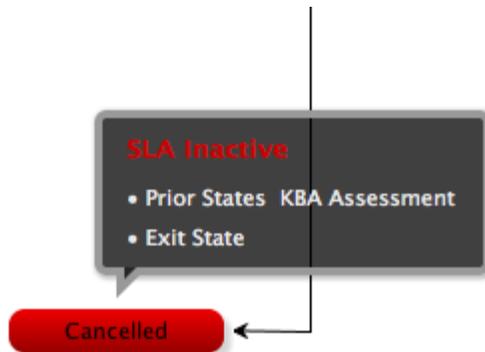
When a Request moves into the Pending Publication State three buttons will be displayed in the Request Summary tab Next Action Field:

Status	Description
	When selected the new content is approved for publication and the Request is moved to the Accept State. (For this example it will be Approved Published.) An alert is sent to the KBA author informing them of the successful publication.
	When selected, the Request Summary screen displays the Notes field to allow the User to add comments and the Request is moved to the On Hold - KBA Rework state. The KBA is returned to the In Development State. The KBA author is sent an Alert, notifying them that the KBA requires revision. When the edits have been made and the KBA is returned to the "Pending Publication" Status, the Request is re-activated and set to the Approval State.

Status	Description
	<p>This option is to be selected when it is decided that the KBA Content is not suitable for the KB.</p> <p>The Request moves to the configured Reject State and a Notes field is displayed allowing the User to record the reason for the decision. The KBA returns to the In Development State, which allows the author to delete the KBA, if desired. The KBA author is sent an Alert, notifying them that the content has been rejected.</p>

NOTE: Only one Approval State can be set per KBA Approval Workflow

11. Click Save
The Status window editor screen will close.
12. Click the Cancelled link



13. Re-name it to Approved Published
This creates an Exit Point for when content is Accepted/Published and will be the Exit State for when content is accepted for publication in the Knowledge Base. For this example the default settings for this State will be the Active State set to No, the SLA Resolution option set to Yes, and the KBA Assessment State mapped as the Previous State.

Workflow - KBA Workflow

Workflow Lifecycle Status

Status

Name

Active State Yes No

Item Editable Yes No

Entry Point

Exit Point

Has Notes

Listener Class

Service

SLA Active Yes No

SLA Restoration Yes No

SLA Resolution Yes No

Previous States

Available states

- In Progress
- On Hold - Pending Approval
- On Hold - Process Escalated
- Open
- Pending - No Contract
- Pending Publication

Selected states

- KBA Assessment

Next States

Lifecycle exit points do not have 'next' states

14. Click Save

15. Click on the Closed - Resolved link to rename it Content Rejected

By default the settings on this State will be, the Active State and SLA Active options set to No and KBA Assessment mapped as the Previous State.

Workflow - KBA Workflow

Workflow **Lifecycle** **Status**

Status

Name

Active State Yes No

Item Editable Yes No

Entry Point

Exit Point

Has Notes

Listener Class

Service

SLA Active Yes No

SLA Restoration Yes No

SLA Resolution Yes No

Previous States

Available states

- In Progress
- On Hold - Pending Approval
- On Hold - Process Escalated
- Open
- Pending - No Contract
- Pending Publication

Selected states

- KBA Assessment

Next States

Lifecycle exit points do not have 'next' states

16. Click Save



NOTE: The On-Hold - KBA Rework State is not visible in the customized Workflow, but will be automatically used by the system, when the Revise option is selected within the KBA Approval Request

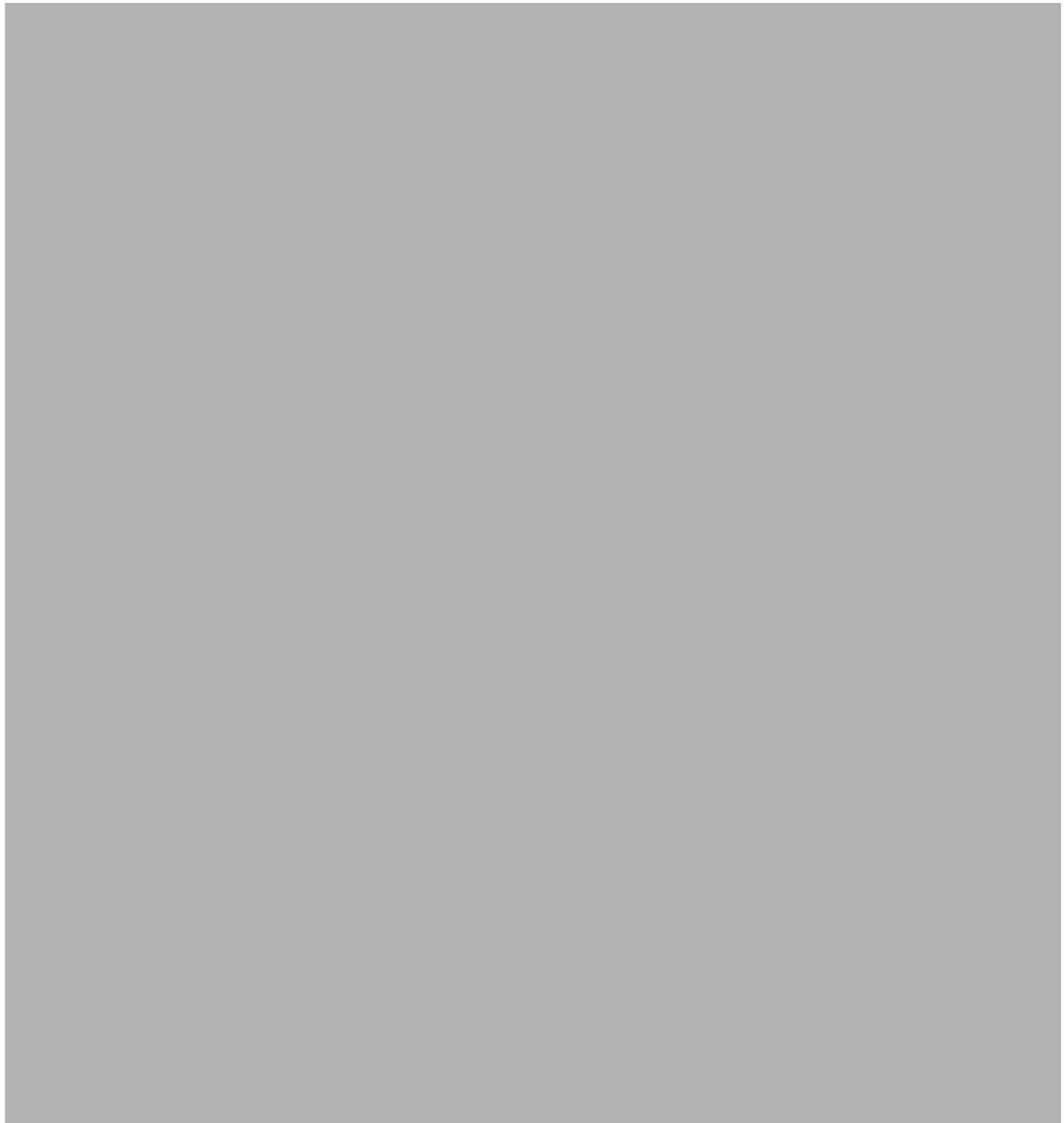
17. Select the Workflow tab

18. Click Edit

The Default Open Status will be set to Pending Publication and the Default Closed Status set to Content Rejected.

19. Refine the Default Closed Status, if desired

If another State is required as a Default Closed State, return to the Lifecycle tab, select New to create a new Default Closed State. Refine the settings to be Active - No, Exit Point - Yes and click Save. Then return to the Workflow tab to set the option in the Default Closed Status field.



20. Click Save
21. Click Done.

Create the KBA Approval Team

When the KBA Approval Workflow has been successfully saved, the Supervisor must create or assign the Change or Service Request Team that is to manage the approval process and allocate the relevant Users to each stage of the Workflow.

1. Go to User > Teams
2. Click New
3. Enter the Team Name
4. Define the Process of Service Request or Change

For this example the Service Request Process is applied.

5. Modify the Team options, as required
See: [Creating Service or Change Request Teams](#).
6. Assign Technicians, and Managers if required
7. Click Next
The screen defaults to the Service screen
8. Move the KBA Approval Workflow to the Selected Workflows field
The KBA Approval Workflow is automatically set at the Default Workflow.



9. Click Next
The system defaults to the Group tab.
10. Select the Default Group link
Rename and assign Users, as required. Create additional Technician Groups, if required.
11. Click Save

12. Select the Default Manager Group link, if relevant
Rename and assign Managers, as required.
13. Click Save

14. Click Next
The screen defaults to the States tab.
15. Assign the relevant Work Groups to the Workflow States
Select the State Name link,
16. Click Next
The screen defaults to the Layers tab. Refine if necessary.
17. Click Done.

NOTE: When all the elements of the KBA Approval Process are in place, see [KBA Content Approval](#) for details of how the content approval Requests are managed.

KBA Content Approval

When the Control KBA via Request option is enabled in the Setup>Privileges>Request tab, Knowledge Base content with a Pending Publication status automatically generates a Request that