



# ZENworks Service Desk 23.3 User Guide

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# 1 User Guide

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- ◆ [Section 1.3, “Basic Procedures,” on page 94](#)
- ◆ [Section 1.4, “User Roles,” on page 125](#)

## 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 Getting Started

- ♦ [Section 1.2.1, “Configuring Your System,” on page 10](#)
- ♦ [Section 1.2.2, “Active Directory Integration,” on page 11](#)
- ♦ [Section 1.2.3, “Configuration Steps,” on page 25](#)
- ♦ [Section 1.2.4, “Setup,” on page 28](#)

### 1.2.1 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.

## 1.2.2 Active Directory Integration

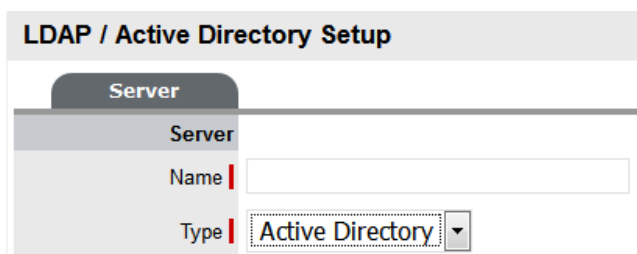
### Active Directory Integration

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

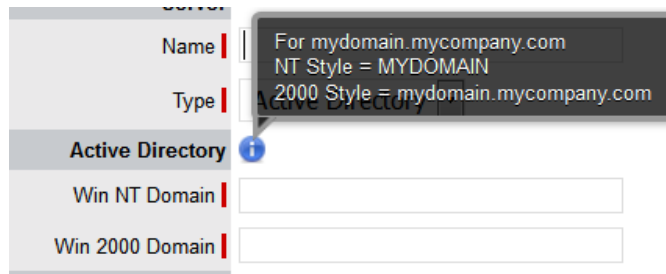


The screenshot shows a web interface titled "LDAP / Active Directory Setup". Below the title is a tab labeled "Server". Under the "Server" tab, there are two input fields: "Name" and "Type". The "Name" field is empty. The "Type" field is a dropdown menu with "Active Directory" selected.

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.



- 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. Enables Import Groups, if you have configured Store and want to assign store items to an LDAP group using "LDAP Group Extension". 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.   |



| Settings            | Description  |
|---------------------|--|
| 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 <a href="#">LDAP/Active Directory Advanced Settings</a> 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><b>Group Admin DN:</b> Specify the group admin DN.</p> <p>Example: cn=user, cn=users, dc=domain, dc=com</p> <p><b>Password:</b> Specify the password of the DN.</p> <p><b>Group Node/Group Based DN:</b> If this field is not specified, then it considers the value specified in Users Node/Base DN.</p> <p><b>NOTE:</b> The above options are enabled only when you select Import Groups checkbox in the Groups section. This is used to assign a store item to an imported LDAP Group using the LDAP Group Extension.</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

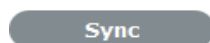
The Test button creates a connection to the Active Directory Server, applying the configuration settings. If successful, it will attempt to determine how many Users are in each group and display a Results Screen.

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

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## Sync Button



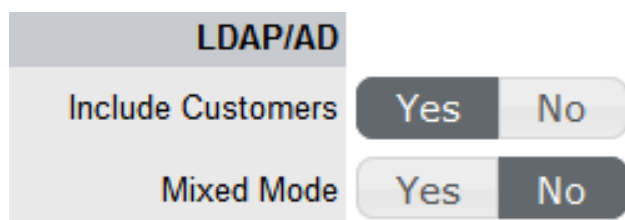
The Sync button runs the synchronization process to import all Users from the Server Directory. If new Active Directory Accounts have been created and those Users require immediate access to the system, a manual synchronization would be used.

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.



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 the installation defaults.</i>  |
| <i>Update Schedule</i>    | <i>Sets a routine synchronization to update the system with current AD/LDAP accounts. Select the required Daily, Weekly or Monthly intervals and Commencement details.</i>  |
| 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 <a href="#">Supervisor</a>, <a href="#">Technician</a> or <a href="#">Partner Roles</a> 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><b>NOTE:</b> 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>Custom: Select the Custom option to manually enter an Attribute Field.</p> |

| Field                                    | Description   |
|--|---|
| GUID                                     | <p>Global Unique Identifier</p> <p>For ADS select objectGUID</p> <p>For OpenLDAP select entryUUID</p> <p>For eDirectory select GUID.</p>  |
| LDAP User fields/ Mixed Mode User Fields | <p>The LDAP User field headings will be replaced with any custom LDAP/ADS Accounts fields created by the Administrator in Setup&gt;Custom Fields ( See <a href="#">Custom Fields.</a>), or Mixed Mode User Fields if the Mixed Mode option is enabled in the Server tab.</p> <p>Use the drop-down list to select the appropriate mapping to the matching directory server field or select Custom to manually enter a Field.</p> |
| Customer Orgs                            | <p>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.</p>  |
| Line Managers                            | <p>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.</p>   |

5. Click Save.

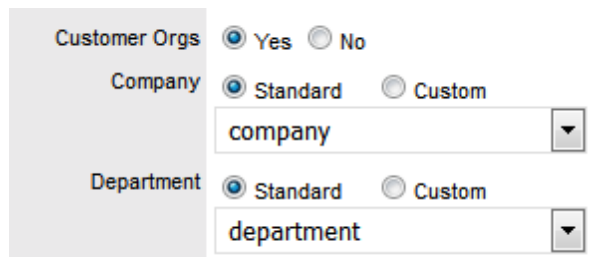
### Mapping Fields to the Matching Directory Server Field

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.



The screenshot shows a configuration form with three sections: 'Customer Orgs', 'Company', and 'Department'. Each section has radio buttons for 'Yes' and 'No', and a dropdown menu. The 'Customer Orgs' section has 'Yes' selected. The 'Company' section has 'Standard' selected and the dropdown menu is set to 'company'. The 'Department' section has 'Standard' selected and the dropdown menu is set to '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](#)

---

| <b>Billing</b>      | <b>Description</b>   |
|---------------------|--|
| 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.  |
| 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.<br><br>See: <a href="#">SLAs</a> . |
| Email Notifications | (This option is visible when Contracts are enabled.)<br><br>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



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:

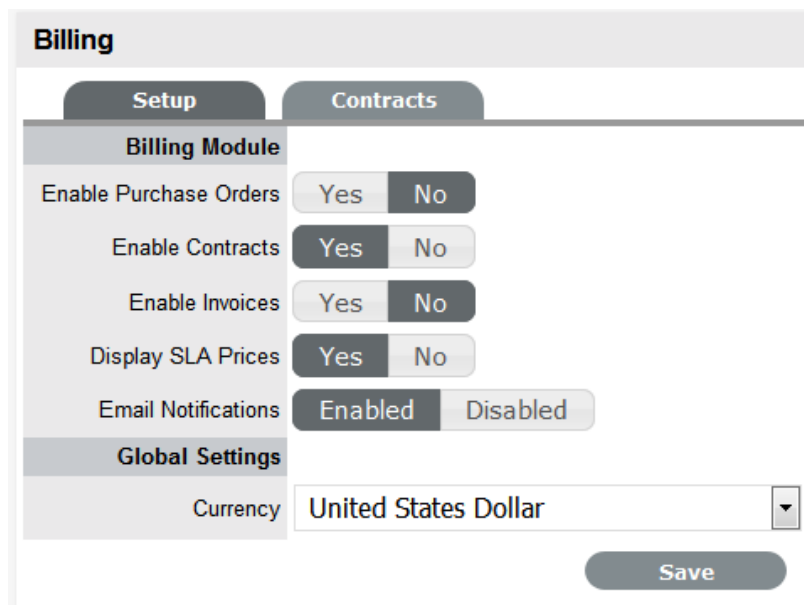
- ◆ Items
- ◆ Customers
- ◆ Organizational Units
- ◆ Requests

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 two tabs: 'Setup' and 'Contracts'. The 'Contracts' tab is active. Under the 'Billing Module' section, there are 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 'Email Notifications' option is currently set to 'Enabled'. Below this is the 'Global Settings' section with a 'Currency' dropdown menu set to 'United States Dollar'. A 'Save' button is located at the bottom right of the window.

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&gt;Email&gt;Templates&gt;Email Summary Templates filter screen. This template is sent with the InvoicePrefix email that can be edited in Setup&gt;Email&gt;Templates&gt;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>  |

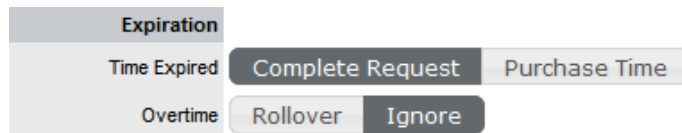
| Options        | Description  |
|----------------|--|
| Low Time Email | <p>The system can automatically send an email to a Customer that is getting close to using all their support hours in their Time-based contracts. The Email can be sent based on the percentage of hours that have been used.</p> <p>The Email content is set in the ContractTimeLow option of Setup&gt;Email&gt;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"> <li>◆ Rollover - means the time used to resolve the issue will be subtracted from the Customer's renewed contract.</li> <li>◆ Ignore - means the time used to resolve the issue, although the Customer contract has expired, is not allocated to a future contract.</li> </ul> <p>(The subject line and content for the automated emails sent on contract expiration is configured in the ContractTimeElapsed and ContractTimeElapsed of Setup&gt;Email&gt;Templates.)</p> |

6. Enter the Contract Renewal Time, if required

For contracts not to be automatically created, leave this field blank.

7. Set Notifications and Thresholds

8. Set Time Expired option



9. Click Save.

## 1.2.3 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](#)

## 1.2.4 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:



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## 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&gt;Email&gt;Templates tab.</p> <p><b>NOTE:</b> 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:<br/>Setup&gt;Customize&gt;Setup&gt;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: <a href="#">Email Polling</a>.)</p> <p><b>NOTE:</b> 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>  |

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---

## General Settings

---

|                          |  |
|--------------------------|--|
| Self Mail                | When set to Yes, new Notes created by a Technician or Customer are also sent to them when they save the Note.  |
| 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.  |
| <b>Notes</b>             |  |
| 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 be adjusted on a per account basis, as required.<br><br><b>NOTE:</b> 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                          |
|-------------------------------------|---|---|---------------------------------|
| <b>General Settings</b>             |   |   |                                 |
| 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   |                                 |
| <b>ZENworks Integration Options</b> |   |   |                                 |
| Enable ZENworks Integration         | <input checked="" type="checkbox"/> Yes   | <input type="checkbox"/> No               |                                 |
| <b>Forum Options</b>                |   |   |                                 |
| Use Forums                          | <input checked="" type="checkbox"/> Yes   | <input type="checkbox"/> No               |                                 |
| Default Sort Order                  | <input checked="" type="button" value="Ascending"/> <input type="button" value="Descending"/> |   |                                 |
| Public Forums                       | <input checked="" type="checkbox"/> Yes   | <input type="checkbox"/> No               |                                 |
| <b>Chat Options</b>                 |   |   |                                 |
| Enable Chat                         | <input checked="" type="checkbox"/> Yes   | <input type="checkbox"/> No               |                                 |
| <b>Outages Options</b>              |   |   |                                 |
| 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               |                                 |
| <b>KBA Review Options</b>           |   |   |                                 |

| 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><b>NOTE:</b> 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.   |

| <b>Privileges</b>               | <b>Description</b>   |
|---------------------------------|--|
| 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>&lt;PROTOCOL&gt;://&lt;SERVER&gt;/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. OpenID Providers that are to be used as delegates are configured in the Setup&gt;Authentication&gt;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>  |

| Privileges                  | Description   |
|-----------------------------|---|
| Minimum Criticality         | Defines the Minimum Criticality required for Items to be displayed on the Outages pages.  |
| Show Affected Relationships | Enables Item from the Outages page to show the Item's Relationships.  |
| 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.<br><br>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. |

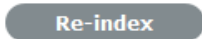
2. Click Yes to enable, or No to disable a Privilege option
3. Click Save.

---

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

---

## Re-Index Button



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                              |                                     |
|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| <b>Technicians</b>       |                                     |                                     |                                     |                                     |
| 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 checked="" type="checkbox"/> | <input 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"/>            |                                     |                                     |
| <b>Work Hours</b>        |                                     |                                     |                                     |                                     |
| 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"/>            |                                     |                                     |
| <b>Configuration</b>     |                                     |                                     |                                     |                                     |
| Supervisors              | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |                                     |
| Technicians              | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |                                     |
| Partners                 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |                                     |
| Finances                 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |                                     |
| <b>Knowledge</b>         |                                     |                                     |                                     |                                     |
| Supervisors              | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Technicians              | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Partners                 | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Managers                 | <input checked="" type="checkbox"/> | <input checked="" 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.<br><br><b>NOTE</b> <ul style="list-style-type: none"><li>◆ This option is not available when Contracts are enabled in the Setup&gt;Billing tab, as time worked on a request must be added to Notes manually by Users.</li><li>◆ In the redesigned request page, the automatic time will not monitor and record the time when the request is in the Edit mode.</li></ul> |
| View All Requests       | Allows Technicians to view all the requests, regardless of Team assignment, logged in the system for the Processes they are assigned.<br><br>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.   |

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## User Privileges

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|                         |  |
|-------------------------|--|
| Define Work Hours       | <p>Allows the Technician's availability to be configured within the Users&gt;Schedule tab. This ensures that Requests are only forwarded to the User during the Defined Work hours, unless there are no other Users available.</p> <p>*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.</p> |
| Assignment Control      | <p>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.</p>   |
| Scheduled Vacations     | <p>Allows leave to be scheduled for Users, within the Users&gt;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.</p>   |
| Vacation Reassign       | <p>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.</p>   |
| Observe Public Holidays | <p>This option ensures the System gives consideration to public holidays when calculating SLA times, escalations and breaches.</p> <p><b>NOTE:</b> When enabled, the Public Holidays sub-menu option is visible within the Admin&gt;Localization&gt;Holidays tab.</p>  |
| Edit Customer Partner   | <p>Allows Customers to be assigned to Partners within the Customer Information tab.</p>  |
| Create Outage           | <p>Enables a Technician to create outages for Items.</p>   |
| Force Analysis          | <p>The system will propose relevant Solutions within the Analysis tab, during the request creation process.</p>  |
| Configuration           |  |
| Roles                   | <p>Set the default privileges for the User Roles' ability to create, edit and delete Item information in the CMDB.</p>   |
| Knowledge               |  |
| Roles                   | <p>Configure the default Knowledge Base authoring permissions for each User Role.</p>  |

---

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 type="radio"/> Yes <input checked="" type="radio"/> No  |
| Default Web Access          | <input checked="" type="radio"/> Yes <input type="radio"/> No  |
| Default Tab                 | <input type="text" value="Home"/>  |
| Incidents                   | <input type="text" value="Create And Edit"/>   |
| Change Requests             | <input type="text" value="Create And Edit"/>   |
| Service Requests            | <input type="text" value="Create And Edit"/>   |
| Service Incidents           | <input checked="" type="radio"/> Yes <input type="radio"/> No  |
| Items                       | <input type="text" value="View"/>  |
| Show Only Active Items      | <input type="radio"/> Yes <input checked="" type="radio"/> No  |
| Show Subject Field          | <input checked="" type="radio"/> Yes <input type="radio"/> No  |
| Show Status Field           | <input checked="" type="radio"/> Yes <input type="radio"/> No  |
| Show Notify Field           | <input checked="" type="radio"/> Yes <input type="radio"/> No  |
| Subject Required            | <input checked="" type="radio"/> Yes <input type="radio"/> No  |
| Force Search                | <input checked="" type="radio"/> Yes <input type="radio"/> No  |
| Create Forum Topics         | <input checked="" type="radio"/> Yes <input type="radio"/> No  |
| Display Room                | <input checked="" type="radio"/> Yes <input type="radio"/> No  |
| View Technician             | <input type="radio"/> Yes <input checked="" type="radio"/> No  |
| Show Services               | <input checked="" type="radio"/> Yes <input type="radio"/> No  |
| Show All Services           | <input checked="" type="radio"/> Yes <input type="radio"/> No  |
| Show Service Targets        | <input checked="" type="radio"/> Yes <input type="radio"/> No  |
| Enable Titles               | <input type="radio"/> Yes <input checked="" type="radio"/> No  |
| Enable Item Shadow          | <input checked="" type="radio"/> Yes <input type="radio"/> No  |
| Customer Defined Contact    | <input checked="" type="radio"/> Yes <input type="radio"/> No  |
| Item in Request             | <input type="radio"/> Mandatory <input checked="" type="radio"/> Optional <input type="radio"/> Hide |
| Show Contact Details        | <input checked="" type="radio"/> Yes <input type="radio"/> No  |
| Default Date Style          | <input type="text" value="mm/dd/yy"/>  |
| Default Timezone            | <input type="text" value="(GMT +5:30) New Delhi"/>   |
| <b>View Shared Requests</b> |  |
| By Ownership                | <input type="radio"/> Yes <input type="radio"/> Limited <input checked="" type="radio"/> No          |

Save

| <b>Customer Privileges</b> | <b>Description</b>   |
|----------------------------|--|
| 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&gt;Setup&gt;Email&gt;Templates&gt;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.  |

| Customer Privileges      | Description   |
|--------------------------|---|
| Display Room             | Displays the Room for an Item when creating a request.  |
| 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.   |
| Items in Request         | <p data-bbox="899 1318 1442 1407">If you select Mandatory, then the Item, Item Type and Item Category fields are mandatory when creating a request.</p> <p data-bbox="899 1436 1442 1524">If you select Optional, then the Item, Item Type and Item Category fields are optional when creating a request.</p> <p data-bbox="899 1554 1442 1707">If you select Hide, then Item, Item Type and Item Category fields are not displayed while creating a request and request creation will be similar to creating a Generic Request in the Classic Customer portal.</p> <p data-bbox="899 1736 1442 1787"><b>NOTE:</b> This privilege was known as Items Required in ZENworks Service Desk 8.0 and 8.1.</p> |

| Customer Privileges  | Description  |
|----------------------|--|
| Show Contact Details | When enabled, allows customers to provide contact details such as Location and Preferred Contact Type and view Line Manager while creating requests.<br><br><b>NOTE:</b> This privilege was known as Show Additional Information in ZENworks Service Desk 8.0 and 8.1. |
| 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.)  |
| By Ownership         | Allows requests to be viewed by all Owners of the Item, when logged against a Shared or Global Item.<br><br>(See the table below for toggle option outcomes.)  |
| By Org Unit          | (This option is visible when the By Ownership is enabled.)<br><br>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. |



| <b>By Ownership</b> | <b>By Org Unit</b> | <b>Shared Request Visibility</b>  |
|---------------------|--------------------|---|
| 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   | <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No           |
| Queues                      | <input checked="" type="checkbox"/> On <input type="checkbox"/> Off           |
| Control Deployments via RFC | <input type="checkbox"/> On <input checked="" type="checkbox"/> Off           |
| Control CMS via RFC         | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No           |
| Customer CMS via RFC        | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No           |
| Minimum Solution Relevance  | <input type="text" value="50"/> %   |
| Enable Quick Calls          | <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No           |
| Request Priority            | <input checked="" type="checkbox"/> Derived <input type="checkbox"/> Selected |
| Handshaking                 | <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No           |
| Handshaking Close Action    | <input type="text" value="2"/> Days   |
| Approval Reminder           | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No           |
| Default Notes Visibility    | <input type="checkbox"/> Public <input checked="" type="checkbox"/> Private   |
| Allow Unknown               | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No           |
| Archive Requests            | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No           |
| Default SLA                 | <input type="text" value="Warranty"/>   |
| Default Incident Team       | <input type="text" value="Device-Incident Team"/>                             |
| Default Problem Team        | <input type="text" value="Problem Analysis Team"/>                            |
| Default Change Team         | <input type="text" value="Change Management Team"/>                           |
| Default Request Team        | <input type="text" value="Service Request Team"/>                             |
| <b>Review Options</b>       |   |
| Review SLA                  | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No           |
| Review RFC                  | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No           |
| <b>KBA Options</b>          |   |
| Control KBA via Request     | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No           |

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#### 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.

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## Request Options

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|  |   |
|--|---|
| 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<br>(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><b>NOTE:</b> 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> |

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## Request Options

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|   |  |
|---|--|
| 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><b>NOTE:</b> 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&gt;Email&gt;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 for searching. However, they can be still accessible for reporting purposes.</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>  |

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## Request Options

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|  |   |
|--|---|
| Default Request Team* (required if using AMIE) | Set the Default Request Team, which is used for AMIE integration and also set as a default Support Team for Item Types.   |
| Review 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.<br><br>(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. |

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\* 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:

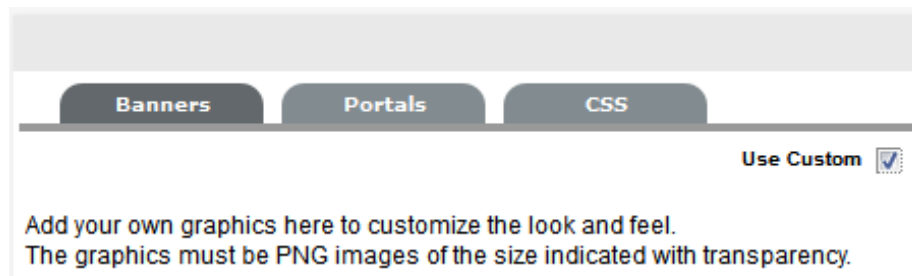
1. Select Setup>Customize

---

| 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.<br><br><b>NOTE:</b> 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. |


---

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



3. To upload a new banner, 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. Repeat the process until all banners have been replaced
6. *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

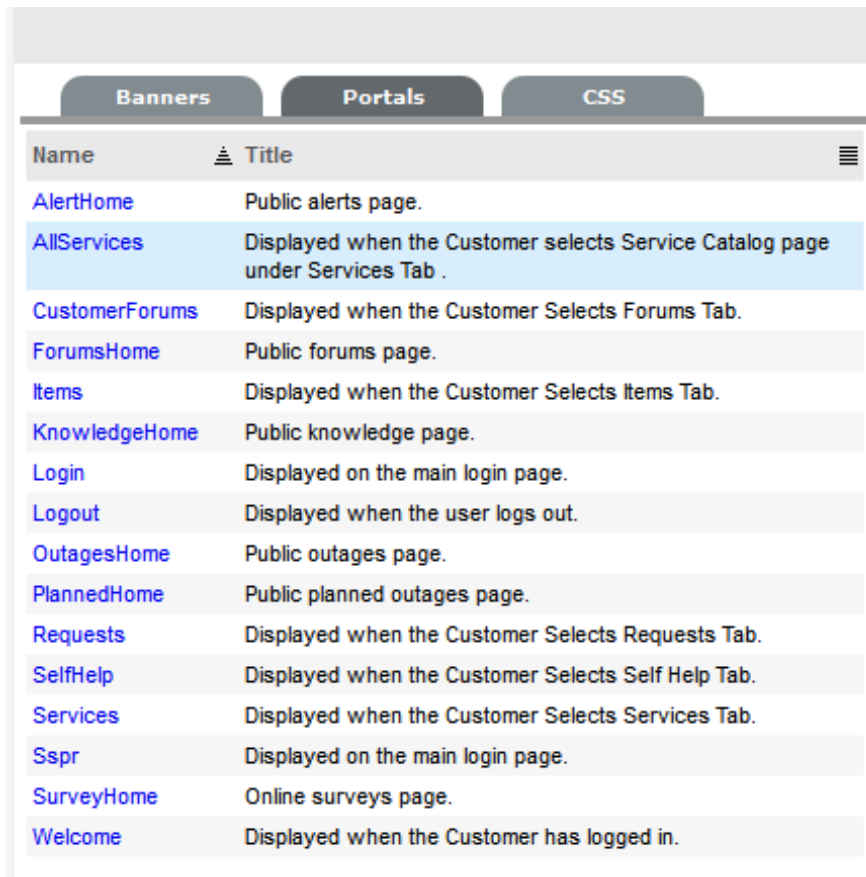
---

**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

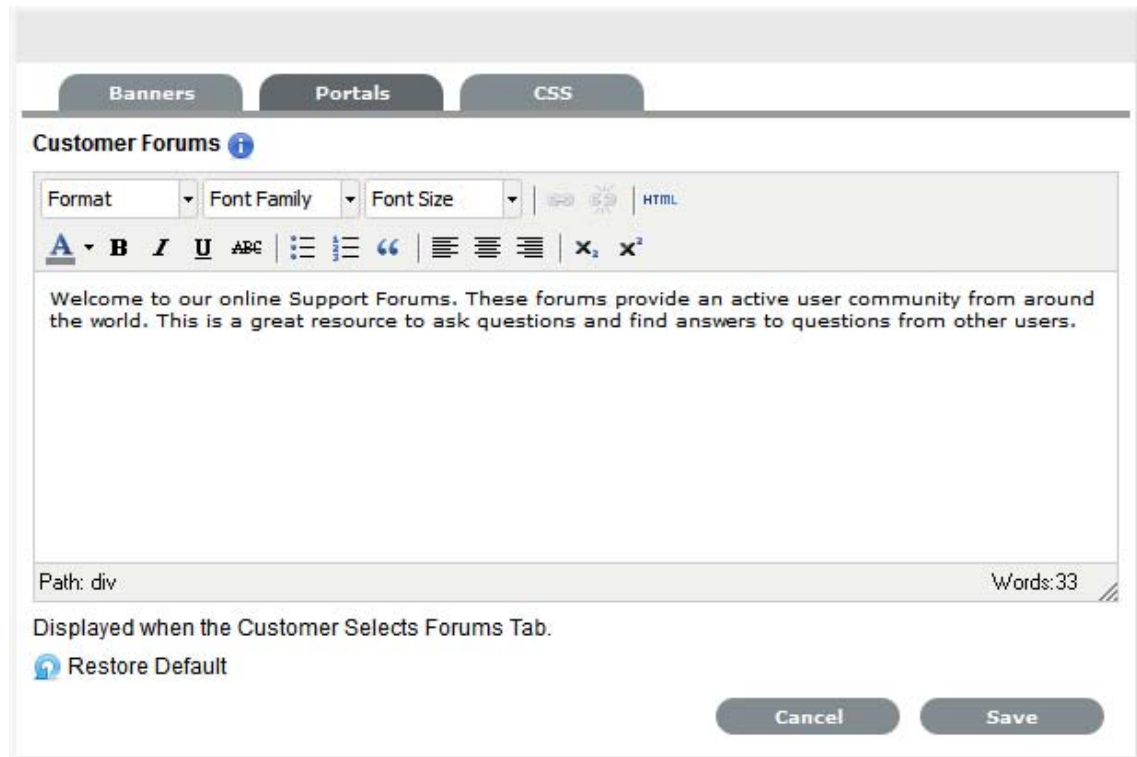


The screenshot shows a web interface with three tabs: Banners, Portals, and CSS. The Portals tab is active, displaying a table with two columns: Name and Title. The table lists various message types and their corresponding titles.

| Name                           | Title   |
|--------------------------------|---|
| <a href="#">AlertHome</a>      | Public alerts page.   |
| <a href="#">AllServices</a>    | Displayed when the Customer selects Service Catalog page under Services Tab . |
| <a href="#">CustomerForums</a> | Displayed when the Customer Selects Forums Tab.                               |
| <a href="#">ForumsHome</a>     | Public forums page.   |
| <a href="#">Items</a>          | Displayed when the Customer Selects Items Tab.                                |
| <a href="#">KnowledgeHome</a>  | Public knowledge page.  |
| <a href="#">Login</a>          | Displayed on the main login page.   |
| <a href="#">Logout</a>         | Displayed when the user logs out.   |
| <a href="#">OutagesHome</a>    | Public outages page.  |
| <a href="#">PlannedHome</a>    | Public planned outages page.  |
| <a href="#">Requests</a>       | Displayed when the Customer Selects Requests Tab.                             |
| <a href="#">SelfHelp</a>       | Displayed when the Customer Selects Self Help Tab.                            |
| <a href="#">Services</a>       | Displayed when the Customer Selects Services Tab.                             |
| <a href="#">Sspr</a>           | Displayed on the main login page.   |
| <a href="#">SurveyHome</a>     | Online surveys page.  |
| <a href="#">Welcome</a>        | 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

|  |   |
|--|---|
| 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.

---

---

## Customer Information Fields

---

|              |  |
|--------------|--|
| Send To      | <p>This field becomes when alternate email addresses are 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> |
| Org. Unit    | <p>The Organizational Unit, be it a Company or Department with which the Customer is associated.</p> <p>(Organizational Units are created by the Supervisor, in Users &gt;Organizational Units.)</p>   |
| Line Manager | <p>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.)</p>   |
| Room         | <p>This field is visible if the Display Rooms option is set to Yes in the Setup&gt;Privileges&gt;Customer screen and there are Room details configured in Organizational Units.</p>  |
| Address 1    | <p>First line of Customer's address.</p>   |
| Address 2    | <p>Second line of Customer's address.</p>  |
| City         | <p>Customer's city details</p>   |
| State        | <p>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.</p>   |
| Zip/Postcode | <p>Customer's area code.</p>   |
| Country      | <p>Customer's country. The country selected will determine the time zone and state options for the Customer.</p>   |
| Email Locale | <p>Set the default language for email correspondence.</p>  |
| Phone        | <p>Enter Phone details.</p>  |
| Fax          | <p>Enter the Customer's fax number, if relevant.</p>   |
| Pager        | <p>Enter the Customer's pager details, if relevant.</p>  |

---

---

## Customer 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 request is created.</p> <p>SMS Messaging options:</p> <ol style="list-style-type: none"><li>1. From the drop-down list, select the SMS Service Provider.</li><li>2. Override SMS Address. If your service provider does not appear in the list, click this checkbox and enter an alternate Service Provider.</li></ol> |
| SMS Override | <p>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@smgateway.provider.com.</p>  |
| 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&gt; Use &gt;Edit Customer Partner. The Partner Organizations are defined by the Supervisor in the User&gt;Partner Organizations tab.)</p>  |
| Locale       |  |
| Time zone    | <p>The Customer automatically adopts the default Timezone set for the system. However, the Timezone can be manually adjusted here for the specific Customer.</p>   |
| Last Login   | <p>Auto-populated with the date the Customer last logged into the system.</p>  |
| Host         | <p>The IP address of the last login for the Customer</p>   |
| GPS          | <p>The GPS coordinates of the last known address for the Customer. (This field is displayed when the Record GPS option is enabled in Admin&gt;Setup&gt;Setup&gt;Privileges&gt;Customer tab.)</p>   |
| Roles        |  |
| Current*     | <p>Multiple Roles can be assigned to a User. Select other Roles the Customer will use, by ticking the check boxes.</p> <p>Note: If the Technician Role is selected, a Supervisor must be allocated.</p>  |

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---

## Customer Information Fields

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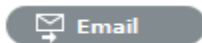
|                |   |
|----------------|---|
| Default Portal | The Default Portal is the user interface a Customer, who is assigned multiple Roles, accesses by default when they log into the system.<br><br><b>NOTE:</b> If the Users Default Portal is set to Customer, the User details will not be accessible 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

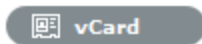
1. Click Done.

## 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

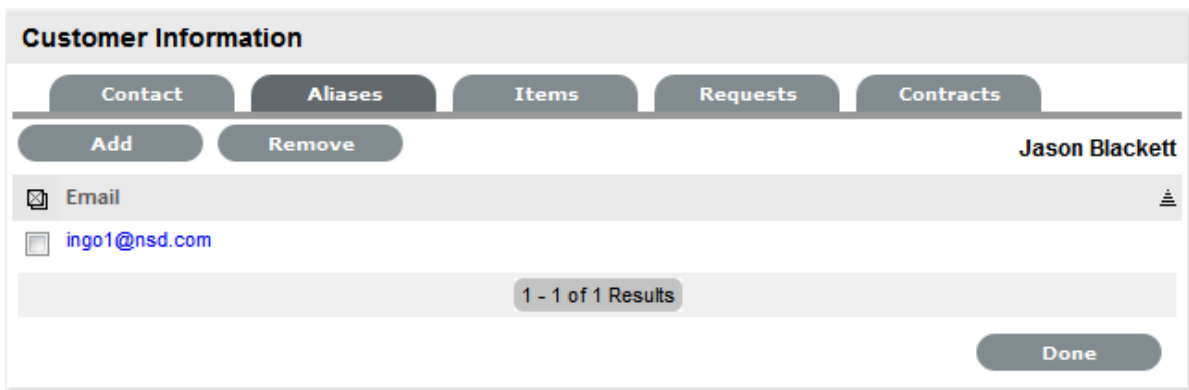


Select this option to download and open the Customer's information in an electronic business card format, to email or save outside the system.

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

1 - 5 of 5 Results

Cancel Save

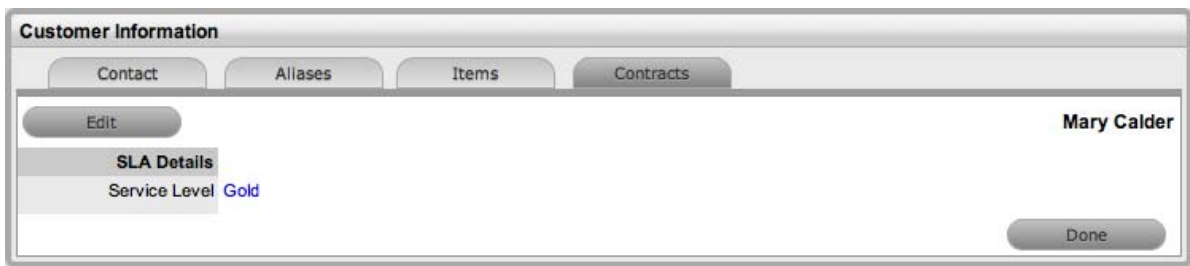
To add an Item:

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

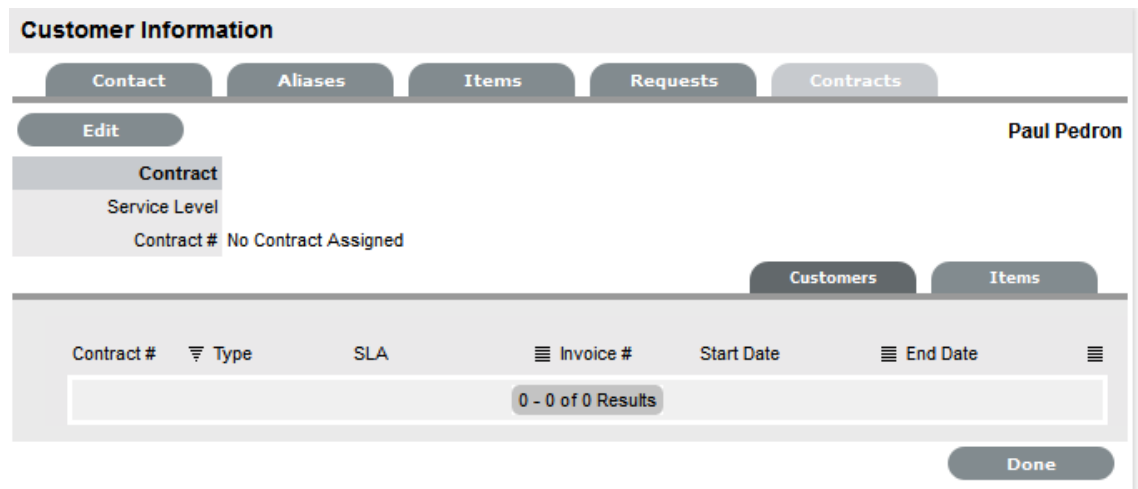
The Contracts tab displays a Customer's current contract status. A Customer can be assigned an SLA or Contract when Billing>Contracts is enabled. A Customer can only have one active Contract.



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 'Contracts' tab is active, and the name 'Michael Angelo' is displayed in the top right corner. Below the tabs, there is a 'Contract' section with the following details: 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; Expires: 1 Year 0 Day. Below this, there are tabs for 'Customers', 'Items', and 'Audit'. The 'Customers' tab is active, showing a table with the following 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, there is a '1 - 1 of 1 Results' indicator and '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.

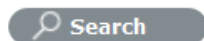
The Items tab within the Customer>Contracts screen is used to list all the Items with a Contract that are owned by a Customer.

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.

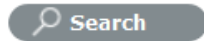
5. Click on the Customer Name to open the Customer Information module or select the Email Address to send an email.

## 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  ne + Password ▼

5. Complete the Settings fields

| Fields          | Description   |
|-----------------|---|
| <i>Security</i> | Secure Socket Layering (SSL) encryption is provided for Active Directory and LDAP server integration. Details entered here determines how the integration layer authenticates.<br><br>User authentication can be with Secure Socket Layering (SSL) or Clear Text. Select Anonymous or User name and Password.<br><br>If Anonymous is selected, ensure anonymous access to the directory is available.   |
| 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       | <i>The system authenticates the user name against the LDAP Server. Leave this blank for anonymous connections.</i><br><br>Where a user name is provided, Netscape allows the internal users to connect as the account name, so using 'cn=Directory Manager' is acceptable.<br><br>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'.<br><br>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. |
| Password        | If a User account is specified in the User name field, enter the account password.  |

| Fields           | Description   |
|------------------|---|
| <i>BaseDN</i>    | <p>The 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> |
| <i>Locale</i>    |   |
| 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="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 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.

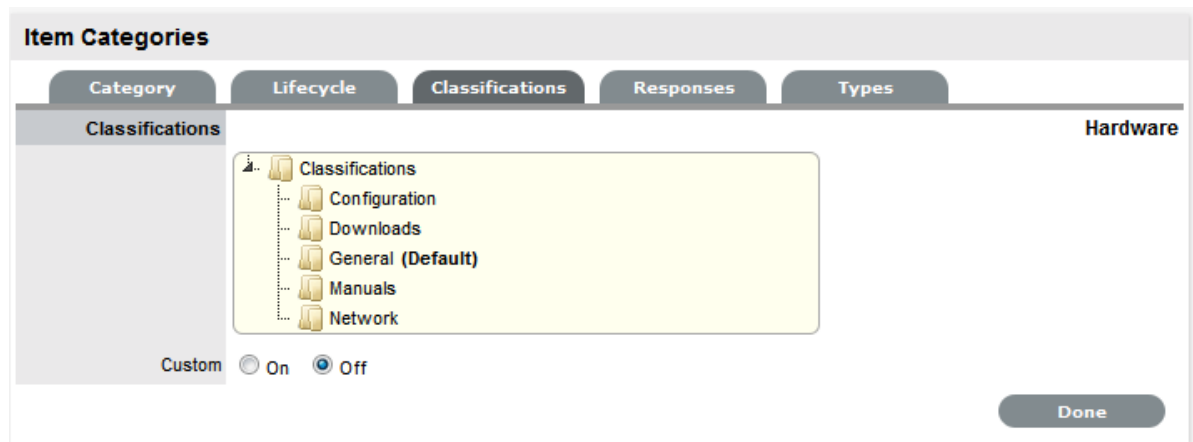
---

**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

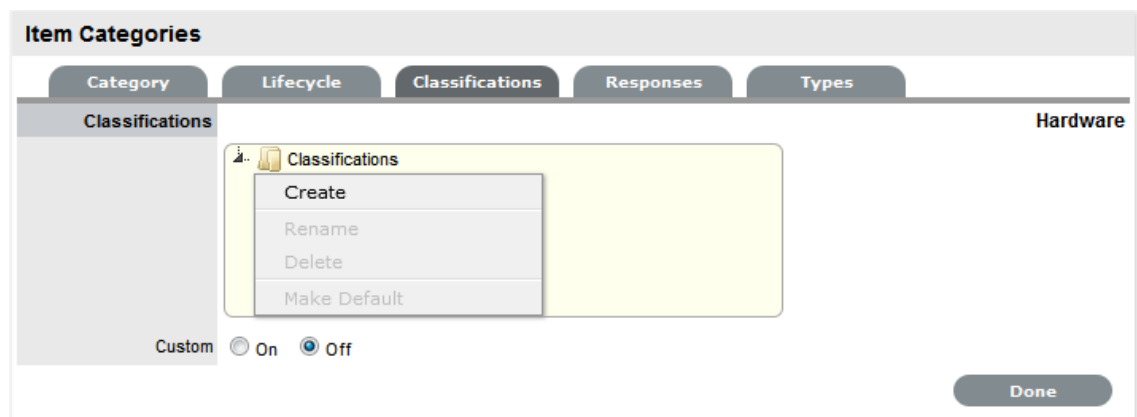
Additional Classifications can be created for each Item Category, while the system provided Classifications can be renamed or deleted. The Custom facility, when enabled, allows Users to add Classifications during the request creation process.



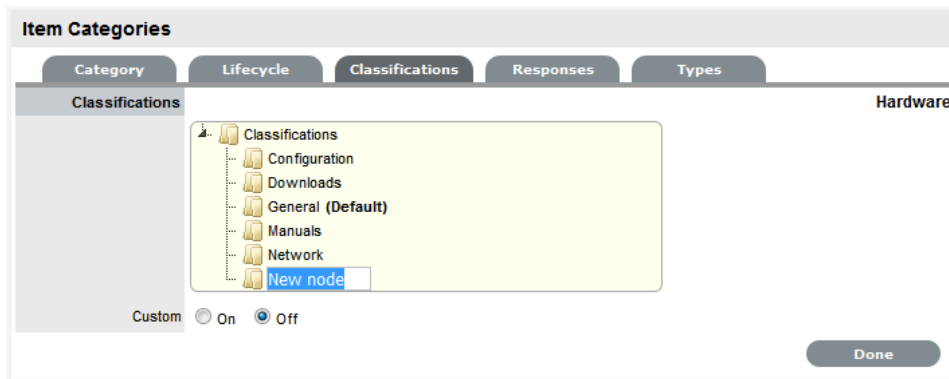
## Creating a New Item Category Classification

To add a new Classification:

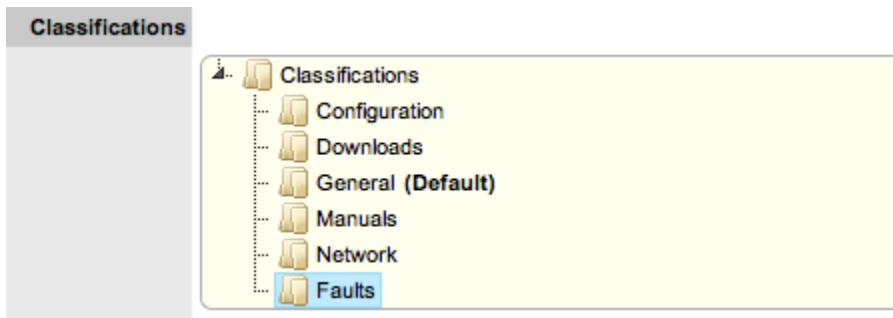
1. Select the Classification tab of an Item Category
2. Right-click on the Classifications header
3. Select Create



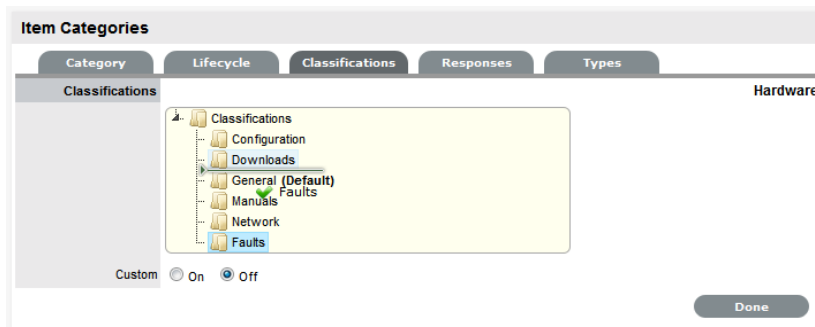
4. Enter the details in the newly created node



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.



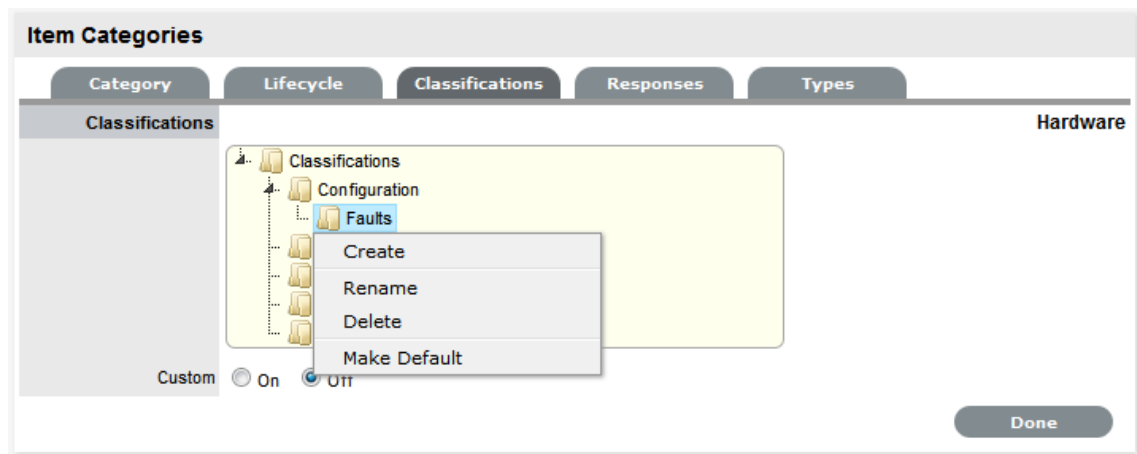
8. Click Save.

## Creating Sub-Classifications

Classifications can be expanded to include nested Classifications.

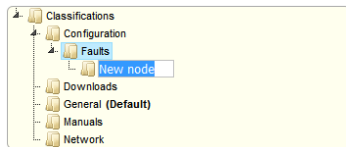
To create Sub-Classifications:

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.



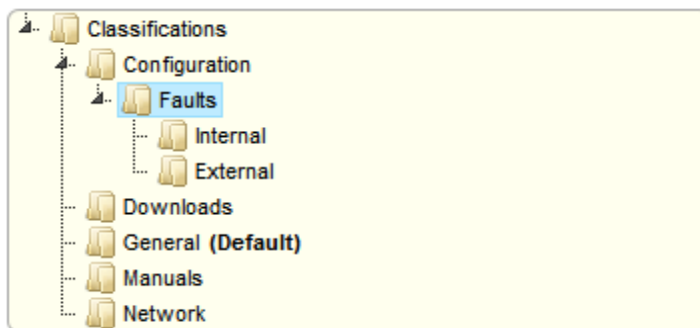
3. Enter the name for the list entry

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.

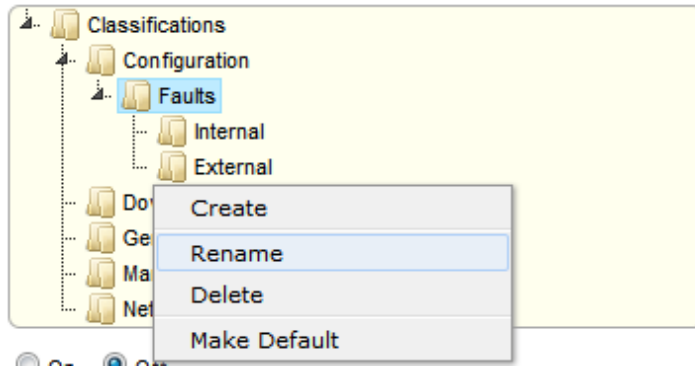


### Renaming a Classification

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.



### 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

Identifier

**Database**

Type

Host

Port

Name

Username

Password

Schema

Catalog

**Ownership**

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

Ignore Domain Info

**Synchronization**

Auto Create New Items

Frequency

---

### 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.   |

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## Configuration

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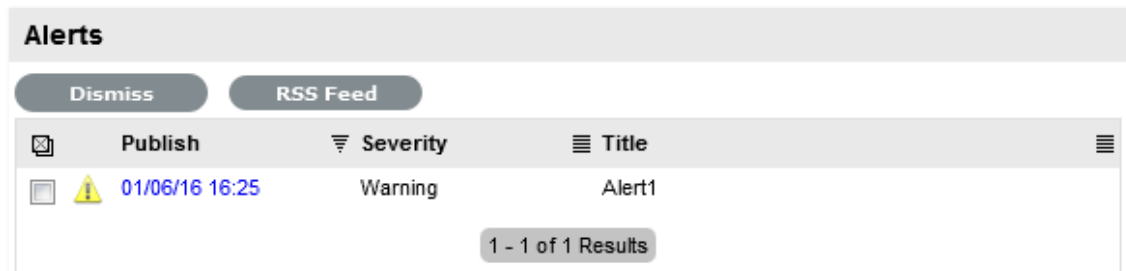
|   |   |
|---|---|
| Port  | Enter the Port Number for the database server.  |
| Name  | Enter the Database name.  |
| Username  | Complete User name details.   |
| Password  | Complete Password details.  |
| Schema  | Enter the Schema type.  |
| Catalog   | Enter the Catalog name. Typically this would 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                                   | <p>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&gt;Privileges&gt;Requests tab .</p> <p>If disabled, a snapshot of imported asset information is listed within the Super&gt;Configuration&gt;AMIE Snapshots tab.</p> |
| Frequency   | <p>Choose a synchronization interval. This can be left as Never if the database will be synchronized manually.</p> <p><b>NOTE:</b> Synchronization times will vary depending on the connection speed with the external service and the database size.</p>   |

---

### 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.

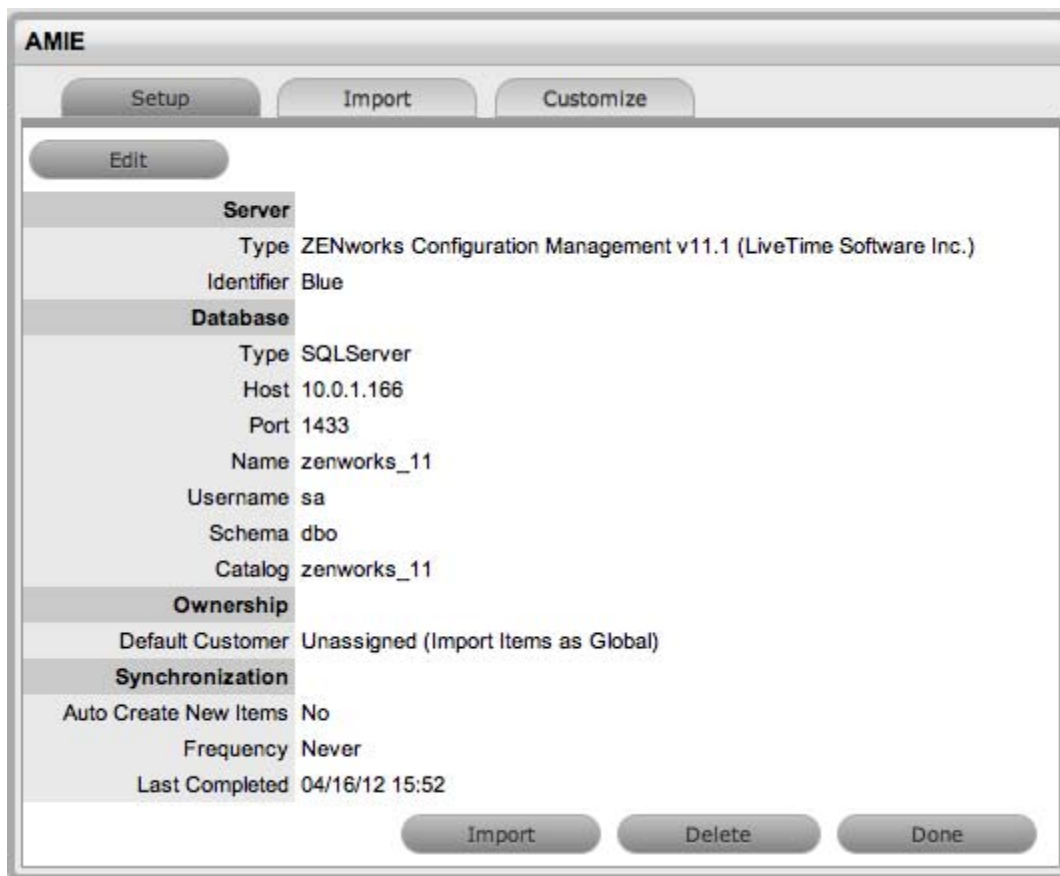
The imported Items that are deleted are not completely removed from the database but are flagged as not available . By not erasing the Items completely, the historical data is maintained and allows these Items to be re-enabled in the future. It should be noted that the Item Types associated with the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

---

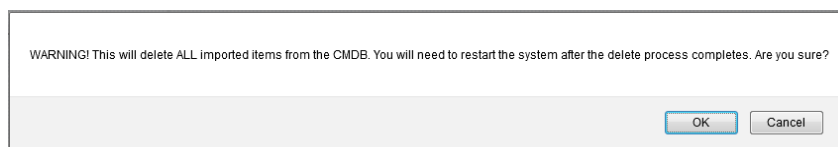
**NOTE:** The application must be restarted after the performance of either deletion operation, to allow the changes to take effect and prevent unpredictable behavior of the system.

---

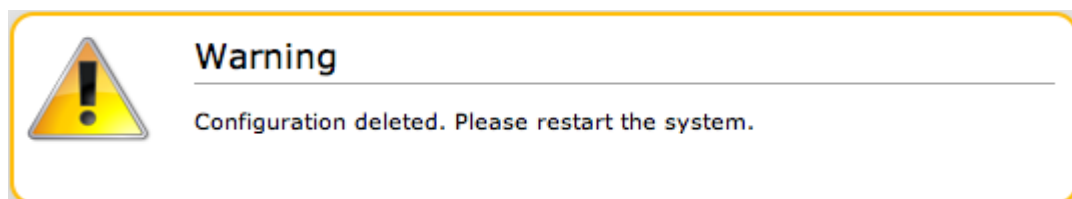


To delete the server configuration within AMIE and related snapshots:

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.

---

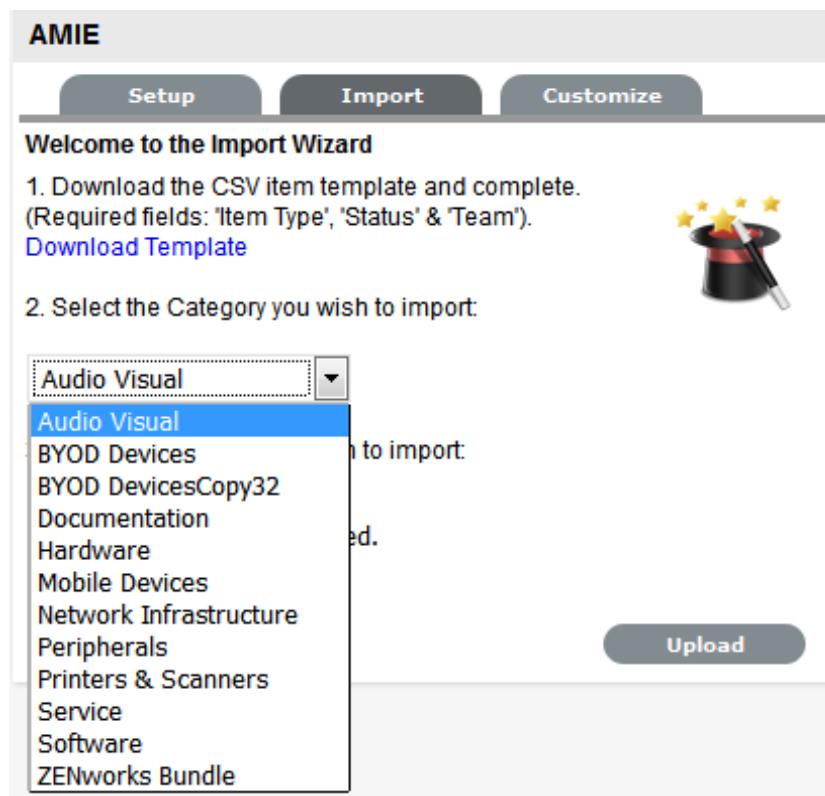
**NOTE:** If relationships are to be created between Items upon import, Parent Items should be imported first. If the system generated Item Number is to be used for the Parent Item, it needs to be included in the Parent Item Number field of the Related Items when they are imported.

---

## 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**

|               |                                    |
|---------------|------------------------------------|
| Item Number   | [0] Item Number (Unique char 64) ▼ |
| Username      | [11] Username (char 128) ▼         |
| Item Type     | [1] Item Type (char 128) ▼         |
| Manufacturer  | [2] Manufacturer (char 64) ▼       |
| Incident Team | [3] Incident Team (char 64) ▼      |
| Problem Team  | [4] Problem Team (char 64) ▼       |
| Change Team   | [5] Change Team (char 64) ▼        |
| Request Team  | [6] Request Team (char 64) ▼       |
| Criticality   | [13] Criticality (char 64) ▼       |
| Status        | [12] Status (char 64) ▼            |

**Details**

|                  |                           |
|------------------|---------------------------|
| Resolution       | [19] Field 1 (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) ▼ |

**General**

|                     |                                       |
|---------------------|---------------------------------------|
| Company             | [8] Company (char 128) ▼              |
| Department          | [9] Department (char 128) ▼           |
| Room                | [10] Room (char 64) ▼                 |
| Service Level       | [7] Service Level (char 256) ▼        |
| Date Format         | MM/dd/yy HH:mm                        |
| Contract Start Date | [14] Contract Start Date (datetime) ▼ |
| Contract End Date   | [15] Contract End Date (datetime) ▼   |
| Purchase Date       | [16] Purchase Date (datetime) ▼       |
| Cost                | [17] Cost (decimal) ▼                 |
| Monthly Cost        | [18] Monthly Cost (decimal) ▼         |
| Notes               | [59] Notes (CLOB) ▼                   |

**Details**

|               |                           |
|---------------|---------------------------|
| Serial Number | [22] Field 4 (char 128) ▼ |
|---------------|---------------------------|

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

|                     |  |
|---------------------|--|
| 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:<br><br>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

---

---

## Field Mapping Wizard

---

|                    |  |
|--------------------|--|
| 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.   |
| 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:

| <b>Item Type</b> |  |
|------------------|--|
| 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. |

| Item Type      |  |
|----------------|--|
| 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&gt;CMS&gt;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&gt;Privileges&gt;System.</p> |
| Icon           | <p>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.</p>   |
| Unit Price     | <p>The per-unit price of the Item Type.</p>  |
| Instance Total | <p>Number of instances owned by the organization.</p>  |
| Assigned       | <p>Number of instances assigned to Customers as Items.</p>   |
| 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&gt;Privileges&gt;Customer&gt;Create Item. (This option is not displayed when the Hidden option is enabled.)</p>   |



| Item Type             |  |
|-----------------------|--|
| Ignore Share          | 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.  |
| Add Forum Topic       | Create a forum topic using the Item Type Name. This option is only displayed when a new Type is being created.   |
| Incident Default      | The Team of Technicians assigned to support Incidents received related to the Item Type. See: <a href="#">Teams</a>  |
| Problem Default       | The Team of Technicians assigned to support Problems received related to the Item Type. See: <a href="#">Teams</a>   |
| Change Default        | The Team of Technicians assigned to support Change Requests received related to the Item Type. See: <a href="#">Teams</a>  |
| Request Default       | The Team of Technicians assigned to support Service Requests received related to the Item Type. See: <a href="#">Teams</a>   |
| Service Level Default | 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.  |
| 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: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.

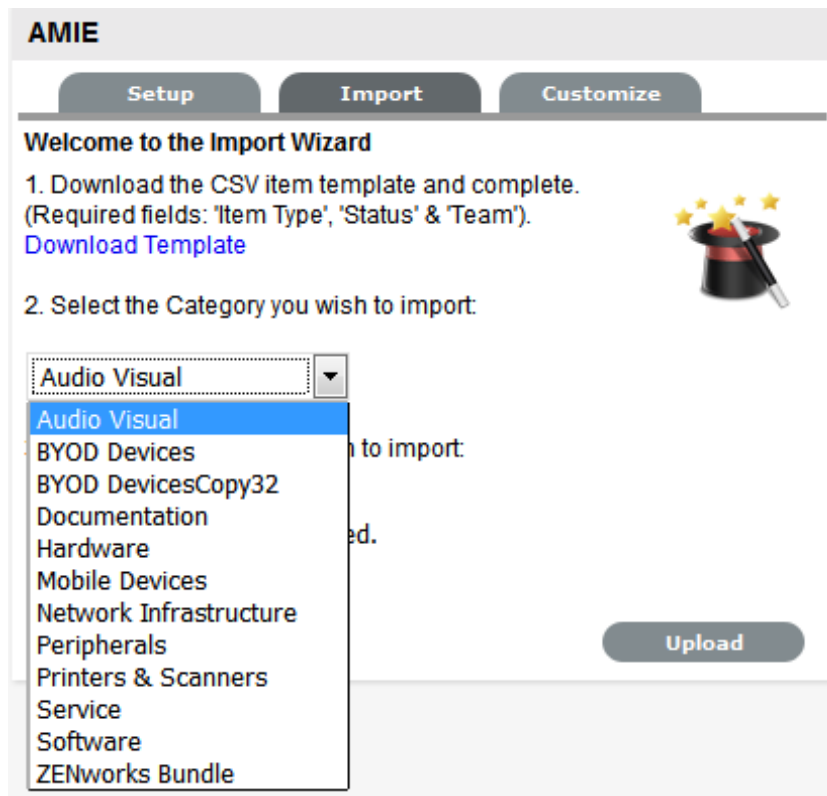
Follow the above *Importing Items* procedure and ensure the Item Number field is mapped correctly. If an Item Number is not included in the .CSV file, a new Item will be created.

## 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

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) |               |                         |

Options  Ignore First Line  
 Verbose Errors

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

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

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:<br><br>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

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 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
- ◆ 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:

---

| <b>Item Type</b> |  |
|------------------|--|
| 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&gt;CMS&gt;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&gt;Privileges&gt;System.</p> |



---

---

| Item Type        |  |
|------------------|--|
| 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  or 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.  |
| 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         | 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.)   |
| Ignore Share     | 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.  |
| Add Forum Topic  | Create a forum topic using the Item Type Name. This option is only displayed when a new Type is being created.   |
| Incident Default | The Team of Technicians assigned to support Incidents received related to the Item Type. See: <a href="#">Teams</a>  |
| Problem Default  | The Team of Technicians assigned to support Problems received related to the Item Type. See: <a href="#">Teams</a>   |
| Change Default   | The Team of Technicians assigned to support Change Requests received related to the Item Type. See: <a href="#">Teams</a>  |

---



| Item Type             |  |
|-----------------------|--|
| Request Default       | The Team of Technicians assigned to support Service Requests received related to the Item Type. See: <a href="#">Teams</a>   |
| Service Level Default | 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.  |
| 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.

## **1.3 Basic Procedures**

- ◆ [Section 1.3.1, “Mandatory Fields,” on page 94](#)
- ◆ [Section 1.3.2, “Creating an Element,” on page 95](#)
- ◆ [Section 1.3.3, “Editing an Element,” on page 95](#)
- ◆ [Section 1.3.4, “Deleting an Entry,” on page 96](#)
- ◆ [Section 1.3.5, “Exporting to PDF and Excel,” on page 97](#)
- ◆ [Section 1.3.6, “Formatting Print Views,” on page 97](#)
- ◆ [Section 1.3.7, “List Views,” on page 97](#)
- ◆ [Section 1.3.8, “List View Options for all Request Types,” on page 100](#)
- ◆ [Section 1.3.9, “List Filters,” on page 116](#)
- ◆ [Section 1.3.10, “Changing Roles,” on page 117](#)
- ◆ [Section 1.3.11, “Buttons,” on page 117](#)
- ◆ [Section 1.3.12, “Online Help,” on page 122](#)
- ◆ [Section 1.3.13, “Remember Login,” on page 123](#)
- ◆ [Section 1.3.14, “Working on requests,” on page 123](#)

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.

### **1.3.1 Mandatory Fields**

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

/ Denotes Mandatory fields

## 1.3.2 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.

## 1.3.3 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.

### 1.3.4 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.

**Customer Information**

Michael Angelo

**Access**

Title

First Name Michael

Last Name Angelo

Username michael@epm.blr.novell.com

Web access Enabled

**Contact**

Primary Email michael@nsd.com

Org. Unit Mico Focus - Head Office

Line Manager

Address 1

Address 2

City

Zip

Country

Email Locale English

Phone

Fax

Pager

Mobile (Required for SMS)

**LDAP**

Source epm.blr.novell.com

GUID 71c170bd8085a248b6db479f536c0ab4

**Partner**

Customer of

**Locale**

Time zone (GMT +5:30) New Delhi

Last Login

**Roles**

Current

Administrator  Supervisor

Manager  Technician

Finance  Partner

Customer

Default Portal Customer Portal

**Details**

Notes

**Edit** **Email** **vCard**

**Done**

2. Click **Edit** in the upper-left corner of the window to enter Edit mode

3. Click  at the bottom of the section.

The entry is now deleted and the User will be returned to the list.

## 1.3.5 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.

---

## 1.3.6 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.

## 1.3.7 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 style="width: 80%;" type="text"/>  |
| Shared    | <input checked="" type="radio"/> No <input type="radio"/> By Role <input type="radio"/> By Team |
| Column 1  | <input style="width: 80%;" type="text" value="Request #"/>                                      |
| Column 2  | <input style="width: 80%;" type="text" value="Not Included"/>                                   |
| Column 3  | <input style="width: 80%;" type="text" value="Not Included"/>                                   |
| Column 4  | <input style="width: 80%;" type="text" value="Not Included"/>                                   |
| Column 5  | <input style="width: 80%;" type="text" value="Not Included"/>                                   |
| Column 6  | <input style="width: 80%;" type="text" value="Not Included"/>                                   |
| Column 7  | <input style="width: 80%;" type="text" value="Not Included"/>                                   |
| Column 8  | <input style="width: 80%;" type="text" value="Not Included"/>                                   |
| Column 9  | <input style="width: 80%;" type="text" value="Not Included"/>                                   |
| Column 10 | <input style="width: 80%;" type="text" value="Not Included"/>                                   |
| Column 11 | <input style="width: 80%;" type="text" value="Not Included"/>                                   |
| Column 12 | <input style="width: 80%;" type="text" value="Not Included"/>                                   |
| Column 13 | <input style="width: 80%;" type="text" value="Not Included"/>                                   |
| Column 14 | <input style="width: 80%;" type="text" value="Not Included"/>                                   |
| Column 15 | <input style="width: 80%;" 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"/> <a href="#">System Incident View</a>  | 12                               | System User |        |         | <a href="#">System Incident View</a>  | <input type="checkbox"/> |
| <input type="checkbox"/> <a href="#">Service Delivery View</a> | 12                               | System User |        |         | <a href="#">Service Delivery View</a> | <input type="checkbox"/> |

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](#)

## 1.3.8 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 moved 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.   |




|                   | Description   |
|-------------------|---|
| 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.   |
| 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: <ul style="list-style-type: none"> <li> Incident Management;</li> <li> Problem Management;</li> <li> Change Management;</li> <li> Request Fulfillment</li> </ul> |
| 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.   |

|                          | Description  |
|--------------------------|--|
| 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. |
| 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.              |

|          | Description                                   |
|----------|---|
| 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. |

|                        | Description  |
|------------------------|--|
| 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.  |
| 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 <a href="#">Admin&gt;Setup&gt;Custom Fields</a> tab for Customer Information.          |
| Customer Name | Displays the Customer's name.   |
| Date Added    | Displays the date the Customer account was first created.   |
| 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.   |




| <b>Customers</b> | <b>Description</b>   |
|------------------|--|
| 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:**

| <b>Org. Units</b>     | <b>Description</b>  |
|-----------------------|---|
| # Customers           | Shows the number of Customers associated with the Org. Unit.  |
| City                  | Shows the City details for the Org. Unit.   |
| 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 <a href="#">Admin&gt;Setup&gt;Custom Fields</a> 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.                             |

| Org. Units    | Description   |
|---------------|---|
| 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       | Includes a visual icon to easily identify if the User is available within the system for request allocation: <ul style="list-style-type: none"> <li> : The User is not on leave and is available for request assignment based on their assigned work hours.</li> <li> : The User is not on leave but is not available for request assignment based on their assigned work hours.</li> <li> : The User has the On Vacation option enabled.</li> </ul> |
| 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 <a href="#">Admin&gt;Setup&gt;Custom Fields</a> tab for User Information.  |
| 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.   |

| <b>Users</b> | <b>Description</b>  |
|--------------|---|
| 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  |

Category: Articles

- Articles
- Change Requests
- Groups
- Incidents
- Invoices
- Mixed Mode Accounts
- Org Units
- Partner Orgs
- Problems
- Purchase Orders
- Releases
- Service Requests
- SLAs

1 - 5 of 5 Results

| 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.  |
| 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 <a href="#">Authentication</a> . |
| Problems          | Additional field for Problem details.   |
| Releases          | Additional field for Release Management details.  |
| Service Requests  | Additional field for Service Request information.   |

| Custom Fields | Custom Field Locations  |
|---------------|---|
| 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

1. To define a custom field, click on the appropriate field label hyperlink

An editable window appears.

The screenshot shows a 'Custom Fields' configuration window. It has a title bar 'Custom Fields' and a sidebar with 'Custom Field' selected. The main area contains:
 

- Field Label:** A text input field with the value 'Custom 1' and an information icon (i).
- Category:** A dropdown menu currently showing 'Article'.
- Active:** A toggle switch with 'Yes' and 'No' options. The 'No' option is currently selected.
- Buttons:** 'Cancel' and 'Save' buttons at the bottom right.

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

### Custom Fields

**Custom Field**

Field Label  i

Category Article

Active Yes No

Required Yes No

Data Type String ▼

Style Text List

Unique Value

Default Value

Input Validation Yes No

Enable Description Yes No

Cancel Save

| Options     | Description   |
|-------------|---|
| Field Label | Edit the Field Label by entering the relevant name. (Required.)<br><br><b>NOTE:</b> 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.   |
| Active      | Defines the Custom Field visibility.  |
| Required    | Defines if the field is mandatory when displayed.   |
| Data Type   | The format required for the field.<br><br>Select the data type from the following: <ul style="list-style-type: none"> <li>◆ String (Text or List)</li> <li>◆ Number-Custom Field that requires a number</li> <li>◆ Boolean (Radio Buttons)</li> <li>◆ Date-Custom Field that requires a value in a date format</li> <li>◆ Currency- A currency can be defined for the Field</li> <li>◆ Hyperlink - A URL can be included in the field.</li> </ul> |

| Options            | Description   |
|--------------------|---|
| Style              | <p>From the options provided, the way the data type will be displayed.</p> <ul style="list-style-type: none"> <li>◆ String custom field - either an open text field or a list, or</li> <li>◆ Boolean custom field - uses radio buttons to define Yes/No or True/False.</li> </ul>   |
| Unique Value       | When active, the system prevents the duplication of data within the customized field.   |
| 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 | 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.   |

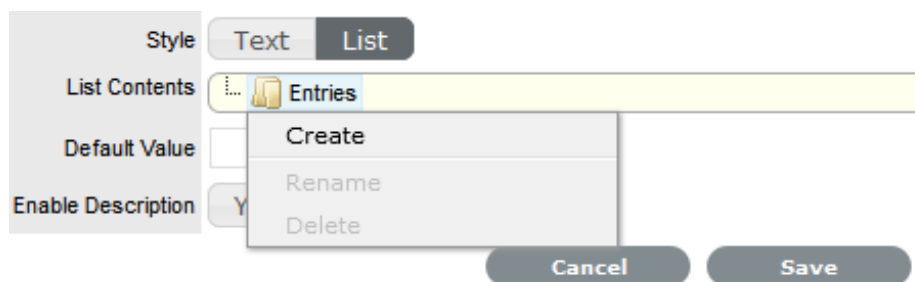
## Data Type - List

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:

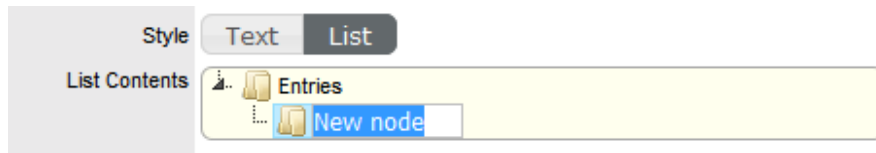
1. Right click the Entries link

The Create option is displayed



2. Click Create

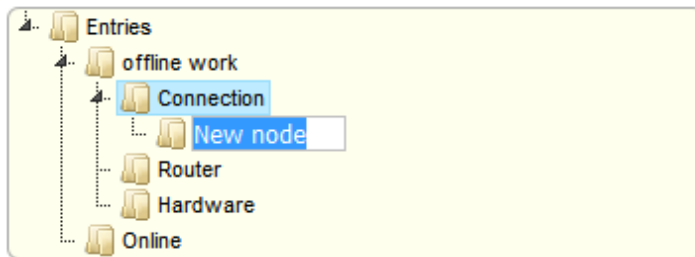
A New node link displayed



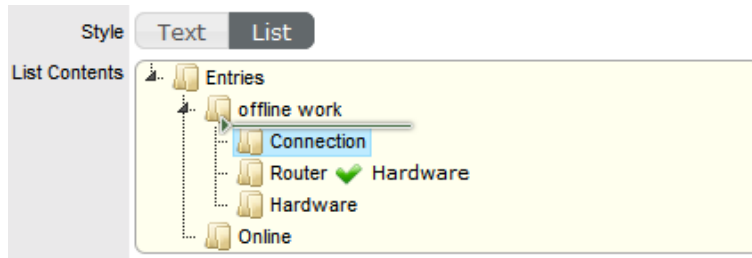
3. Enter the name of the field
4. Click outside the field to save the entry



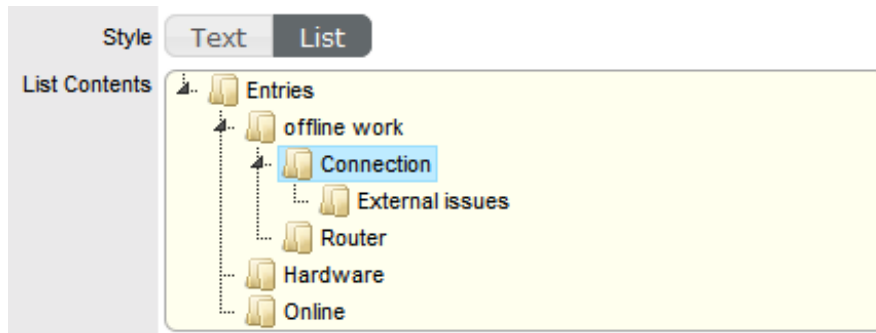
5. Repeat this process until all list entries have been added  
To create a nested list, right click on the relevant list entry and repeat the above process.



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 | Custom 1 ⓘ

Category | Change Request

Active | Yes No

Required | Yes No

Customer Visible | Yes No ←

Customer Editable | Yes No ←

Data Type | String ▾

Style | Text List

Unique Value |

Default Value |  ←

Input Validation | Yes No

Enable Description | Yes No

Description | Customer field description is used to type the detailed information that is useful for both customers and users.

Cancel Save

---

**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.


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## 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.  |

|       | Description   |
|-------|---|
| Votes | Shows the total number of votes recorded against an Article or FAQ. |

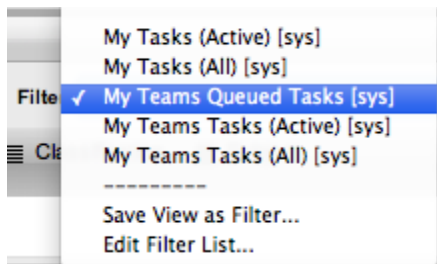
If Custom Fields have been enabled for a Articles in Admin>Setup>Custom Fields, they will also be available in the Views Editor drop-down list options.

### 1.3.9 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](#).



## 1.3.10 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.

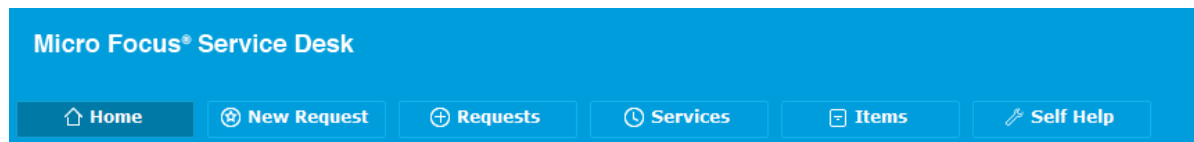
The User Roles of Supervisor or Technician, Finance and Manager are consolidated within one User view. Therefore, if a User is assigned Finance, Manager and Supervisor/Technician access, they can view all functionality related to these Roles within the User view. If the User is also assigned Admin and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

[setup] [Customer] System Supervisor

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.


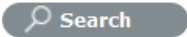



The screen defaults to the selected functionality.

## 1.3.11 Buttons

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### Common Buttons

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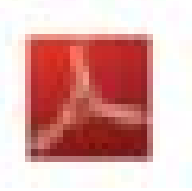
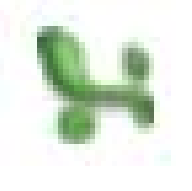


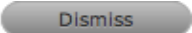

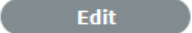




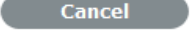
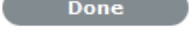
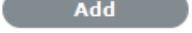
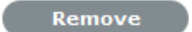


|   |   |
|---|---|
|  | Create a new request, Item, Customer, etc.              |
|  | Search option provided in List Views across the system. |
|  | Search button within activities across the system.      |
|  | Add button allows User to add Customers, etc            |
|  | Print screen.   |

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## Common Buttons

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|   |  |
|---|--|
|    | Closes the pop-up window.  |
|    | Create a PDF document from screen information.   |
|    | Create an Excel document from screen information.  |
|    | 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.  |

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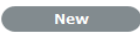
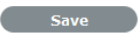
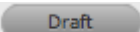
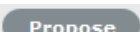
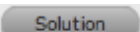
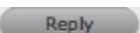
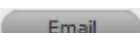
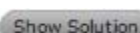
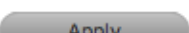
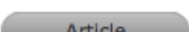
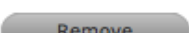
## Request Buttons

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## Common Buttons

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|   |   |
|---|---|
|    | 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.   |
|    | 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.<br><br>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.   |

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## Common Buttons

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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

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 the request details and history in a print screen.



Alerts

Allows the User to create an Alert for the request, which is then visible within the Analysis tab.

Link

Group requests.

Unlink

Removes a request from a group.



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

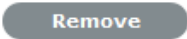
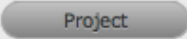
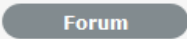

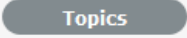






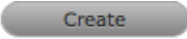





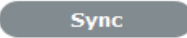


Add the selected request to the Group.

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## Common Buttons

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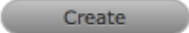
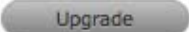

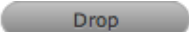
|   |   |
|---|---|
|    | Remove the selected request from the Group.                             |
|    | Outputs the Change Groups List View in a Projects document format.      |
| Forum Buttons   |   |
|    | Return to the Forums list.  |
|    | Edit a Forum details.   |
|    | Returns User to topics list.  |
|    | Hides posts from the User or Customer.                                  |
|    | Delete a topic post.  |
|    | Move a topic post.  |
|    | Show a Topic post that has been hidden.                                 |
|    | Mark the current topic for quick access as a bookmark.                  |
|  | Reply to a Forum topic.   |
| Reports Buttons   |   |
|  | Generate a report.  |
| Logging Buttons   |   |
|  | Enter login details to access application.                              |
|  | Close out of the application.   |
| Setup Buttons   |   |
|  | Import CSV file of Items, Customers or KBAs.                            |
|  | Test email and authentication server set-up.                            |
|  | Re-enable a deleted Customer, User or Item.                             |
|  | Synchronize the system with LDAP /AD server.                            |
|  | Reset password.   |
|  | Open extended database options (i.e. Upgrade, Create and Drop options). |

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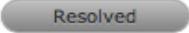

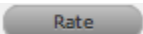






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## Common Buttons

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|   |   |
|---|---|
|  | Generate a script to create a new database.                         |
|  | Migrate database.   |
|  | Tests the connection to the database, based on the details entered. |
|  | Generate a script to delete a database.                             |

## Customer Portal Buttons

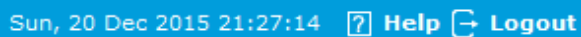
|   |  |
|---|--|
|    | Remove content in search fields.               |
|    | Search content in search fields                |
|    | Close the request in the Customer Portal.      |
|    | Create a new Item through the Customer Portal. |
|    | Evaluate the usefulness of an Article.         |
|    | 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.        |

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## 1.3.12 Online Help

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

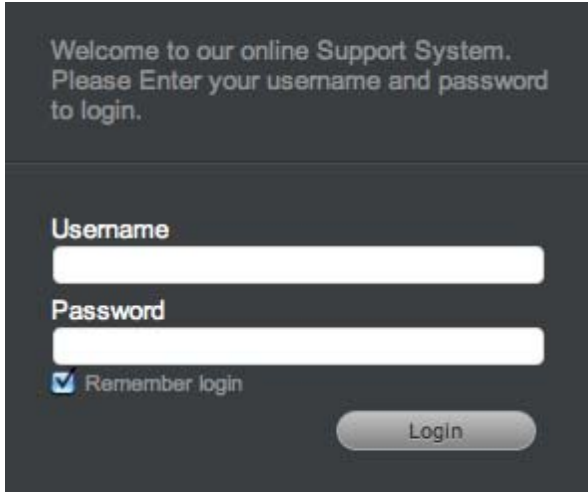
To access information relevant to an opened screen, click the Help button located in the top right corner of the screen, next to the Logout button.



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.

### 1.3.13 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.

A screenshot of a login page with a dark background. At the top, it says "Welcome to our online Support System. Please Enter your username and password to login." Below this are two white input fields labeled "Username" and "Password". Under the "Password" field is a checkbox labeled "Remember login" which is checked. At the bottom right is a "Login" button.

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.

### 1.3.14 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.

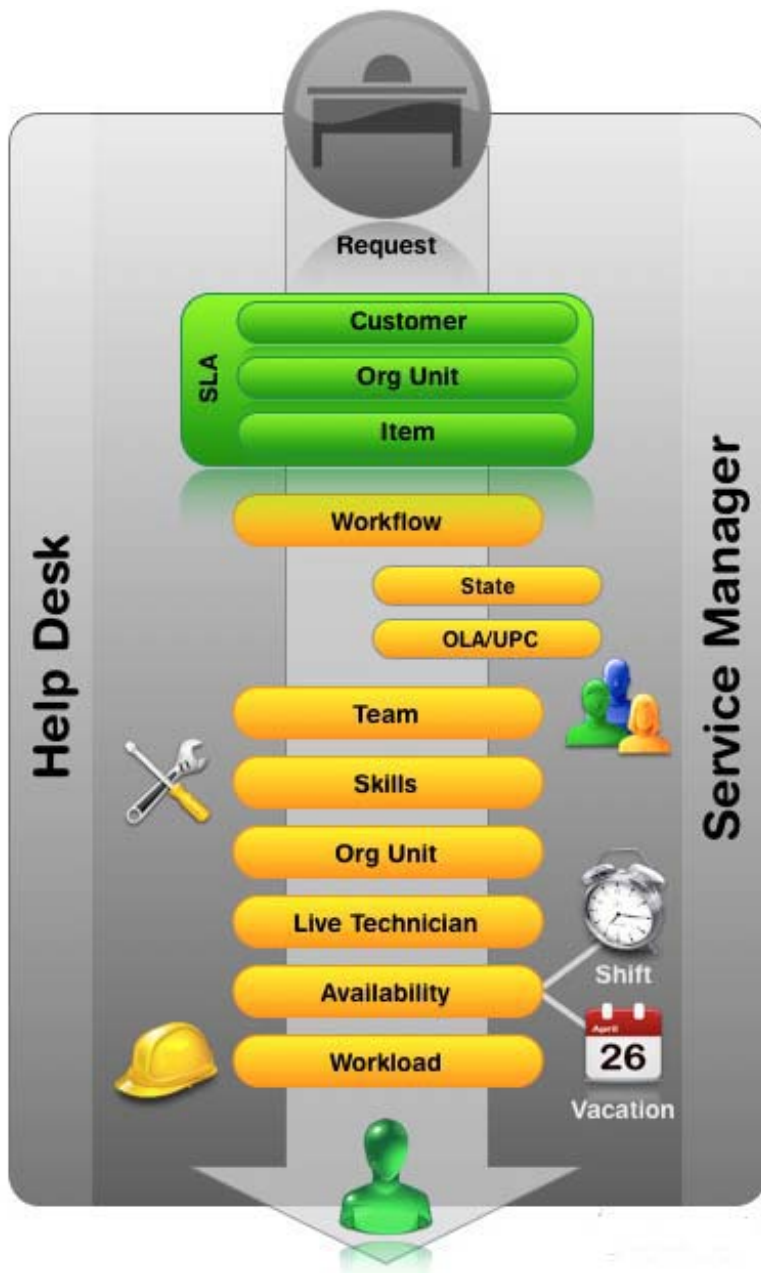


Figure 1: Request assignment logic

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** .

## 1.4 User Roles

- ♦ [Section 1.4.1, "Default Portal," on page 126](#)
- ♦ [Section 1.4.2, "User Processes," on page 126](#)
- ♦ [Section 1.4.3, "User Roles & Privileges," on page 127](#)
- ♦ [Section 1.4.4, "Administrator Role," on page 135](#)
- ♦ [Section 1.4.5, "Supervisor Role," on page 135](#)
- ♦ [Section 1.4.6, "Technician Role," on page 136](#)
- ♦ [Section 1.4.7, "Partner Role," on page 137](#)
- ♦ [Section 1.4.8, "Manager Role," on page 137](#)
- ♦ [Section 1.4.9, "Finance Role," on page 138](#)
- ♦ [Section 1.4.10, "Customer Role," on page 138](#)

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

## 1.4.1 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.

## 1.4.2 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

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◆ **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.

### 1.4.3 User Roles & Privileges

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#### Service Manager User Roles and Privileges

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| Modules & Features                     | Administrator | Supervisor | Technician | Partner | Finance | Manager | Customer |
|--|---------------|------------|------------|---------|---------|---------|----------|
| Setup                                  |               |            |            |         |         |         |          |
| Email Setup and email customization    | Yes           |            |            |         |         |         |          |
| Create Custom Fields                   | Yes           |            |            |         |         |         |          |
| Set User, Customer & System Privileges | Yes           |            |            |         |         |         |          |
| UI customization                       | Yes           |            |            |         |         |         |          |

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**Service Manager  
User Roles and  
Privileges**

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|  |     |     |       |       |       |       |     |
|--|-----|-----|-------|-------|-------|-------|-----|
| 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   |     |
| Search Customers                             | Yes | Yes | Yes   | Yes   | Yes   | Yes   |     |
| Re-enable deleted Users & Customers          | Yes |     |       |       |       |       |     |

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**Service Manager  
User Roles and  
Privileges**

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|  |     |       |       |     |     |
|--|-----|-------|-------|-----|-----|
| Create Organizational Units                    | Yes | Yes   | Yes   | Yes | Yes |
| Assign Contracts to Cust Org. Units            | 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 |     |     |
| View all & re-assign Service Request           | Yes | Setup | Setup |     |     |

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**Service Manager  
User Roles and  
Privileges**

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|  |     |       |       |     |     |
|--|-----|-------|-------|-----|-----|
| 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                      |     |       |       |     |     |

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**Service Manager  
User Roles and  
Privileges**

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|   |     |       |       |     |     |
|---|-----|-------|-------|-----|-----|
| 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 |       |       |     |     |

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**Service Manager  
User Roles and  
Privileges**

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Service Asset &  
Configuration,  
Service Portfolio  
& Service Catalog  
Management

|                              |     |       |       |       |       |       |
|------------------------------|-----|-------|-------|-------|-------|-------|
| Create/Edit/<br>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<br>deleted Items | Yes |  |  |  |  |  |
|----------------------------|-----|--|--|--|--|--|

|   |     |  |  |  |  |  |
|---|-----|--|--|--|--|--|
| Create Item<br>Categories, Types<br>& 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<br>Underpinning<br>Contracts | Yes | Yes |  | Yes | Yes |  |
|-------------------------------------|-----|-----|--|-----|-----|--|

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

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

|                            |     |  |  |  |  |  |
|----------------------------|-----|--|--|--|--|--|
| Create SLA<br>Breach Codes | Yes |  |  |  |  |  |
|----------------------------|-----|--|--|--|--|--|

|                      |     |     |  |     |     |  |
|----------------------|-----|-----|--|-----|-----|--|
| View SLA<br>breaches | Yes | Yes |  | Yes | Yes |  |
|----------------------|-----|-----|--|-----|-----|--|

Financial  
Management

|                           |  |  |  |     |  |  |
|---------------------------|--|--|--|-----|--|--|
| Create Purchase<br>Orders |  |  |  | Yes |  |  |
|---------------------------|--|--|--|-----|--|--|

|                            |  |  |  |     |  |  |
|----------------------------|--|--|--|-----|--|--|
| Process Purchase<br>Orders |  |  |  | Yes |  |  |
|----------------------------|--|--|--|-----|--|--|

|                                |  |  |  |     |  |  |
|--------------------------------|--|--|--|-----|--|--|
| Create and Assign<br>Contracts |  |  |  | Yes |  |  |
|--------------------------------|--|--|--|-----|--|--|

---



---

**Service Manager  
User Roles and  
Privileges**

---

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

---

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**Service Manager  
User Roles and  
Privileges**

---

|                                  |     |     |       |     |     |     |       |
|----------------------------------|-----|-----|-------|-----|-----|-----|-------|
| Organization Reports             |     | Yes |       |     | Yes | Yes |       |
| Technician Reports               |     | Yes |       |     |     |     | Yes   |
| 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   |
| Enable Quick Calls               | Yes |     |       |     |     |     |       |
| Create Quick Call Templates      |     | Yes |       |     |     |     |       |
| Set User Preferences             | Yes | Yes | Yes   | Yes | Yes | Yes | Yes   |
| Disable receiving personal email | 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 |

---

---

**Service Manager  
User Roles and  
Privileges**

---

|                                      |       |
|--------------------------------------|-------|
| Create Items                         | Setup |
| View Outages                         | Yes   |
| Chat Technician<br>regarding request | Setup |
| Search Forums                        | Setup |
| Complete<br>Surveys                  | Yes   |
| Subscribe to RSS<br>feeds            | Yes   |

---

## 1.4.4 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](#).

---

## 1.4.5 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](#).

---

## 1.4.6 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](#).

---

## 1.4.7 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.

## 1.4.8 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](#).

---

## 1.4.9 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](#).

---

## 1.4.10 Customer Role

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

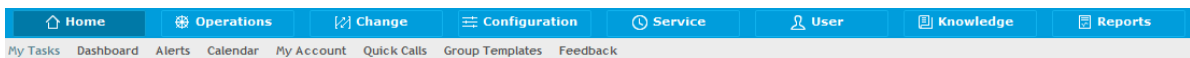
Within the system, based on the system configuration, Customers can:

- ♦ 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 139
- ◆ Section 2.2, “ITIL,” on page 140
- ◆ Section 2.3, “Home,” on page 141
- ◆ Section 2.4, “Operations,” on page 181
- ◆ Section 2.5, “Change,” on page 431
- ◆ Section 2.6, “Configuration,” on page 549
- ◆ Section 2.7, “Service,” on page 642
- ◆ Section 2.8, “User,” on page 724
- ◆ Section 2.9, “Knowledge,” on page 799
- ◆ Section 2.10, “Reports,” on page 859
- ◆ Section 2.11, “Finance,” on page 893

## 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:

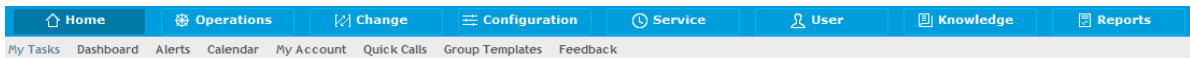
- ♦ [Financial Management](#) (Service Strategy)
- ♦ [Service Portfolio](#) (Service Strategy)
- ♦ [Service Catalog](#) (Service Design)
- ♦ [Service Level Management](#) (Service Design)
- ♦ [Change Management](#) (Service Transition)
- ♦ [Service Asset & Configuration Management](#) (Service Transition)
- ♦ [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 142
- ◆ [Section 2.3.2, “Searching for an Item,”](#) on page 144
- ◆ [Section 2.3.3, “Dashboard,”](#) on page 148
- ◆ [Section 2.3.4, “Alerts,”](#) on page 151
- ◆ [Section 2.3.5, “Chat,”](#) on page 156
- ◆ [Section 2.3.6, “Calendar,”](#) on page 158
- ◆ [Section 2.3.7, “My Account,”](#) on page 158
- ◆ [Section 2.3.8, “Quick Calls,”](#) on page 161
- ◆ [Section 2.3.9, “Group Templates,”](#) on page 167
- ◆ [Section 2.3.10, “Dynamic Form,”](#) on page 170
- ◆ [Section 2.3.11, “Feedback,”](#) on page 180



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 142](#)

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.

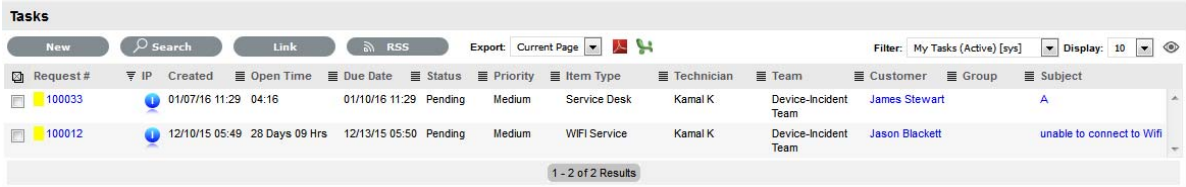
The [List View](#) can also be customized by clicking .

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.



| 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 |

## 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.](#)

---

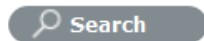
## 2.3.2 Searching for an Item

- ♦ [“Tips on searching for an Item:” on page 146](#)
- ♦ [“Full Text Search Options” on page 147](#)

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  ▼

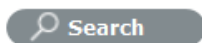
Item Type

Status
  All
  Active
  Inactive

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).                                      |

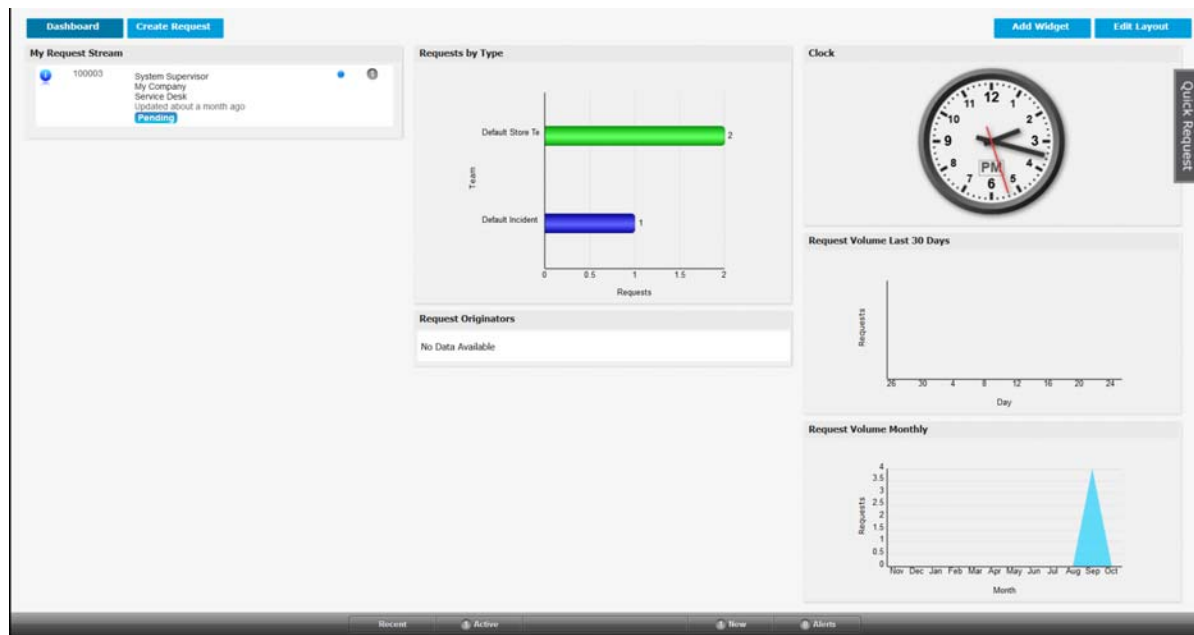
To search on a specific field, within the Term or All Text field enter the name of the field to be searched on followed by a colon and the term or text. For example, if searching for a specific Title, the Term or All Text search field would be completed as follows for the various search types:

- ◆ 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 149](#)
- ◆ [“Customizing the Dashboard” on page 149](#)
- ◆ [“Widget Menu Options” on page 149](#)

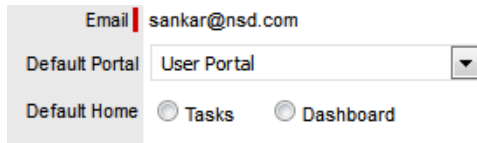
The Dashboard can be customized to display automatically updating request lists, system reports and information using widgets. The Request Stream widget provides Users with a list of requests that automatically updates without requiring a screen refresh, as is required in the My Tasks tab.





## 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 are two settings: 'Default Portal' set to 'User Portal' and 'Default Home' with two radio buttons, 'Tasks' and 'Dashboard'. The 'Dashboard' radio button is 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.

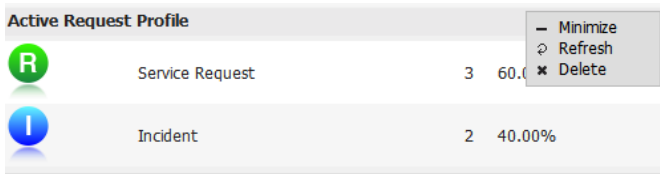
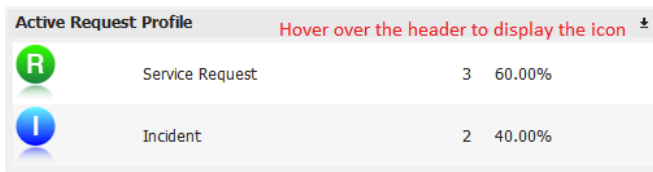


3. Click the image for the required Layout option

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.



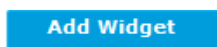
| Menu Option       | Description   |
|-------------------|---|
| Minimize/Maximize | Select Minimize to reduce the view of the widget to the Widget Header. When minimized, the Maximize option becomes available. Click Maximize to display the widget in full. |
| View Data         | Available within the 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



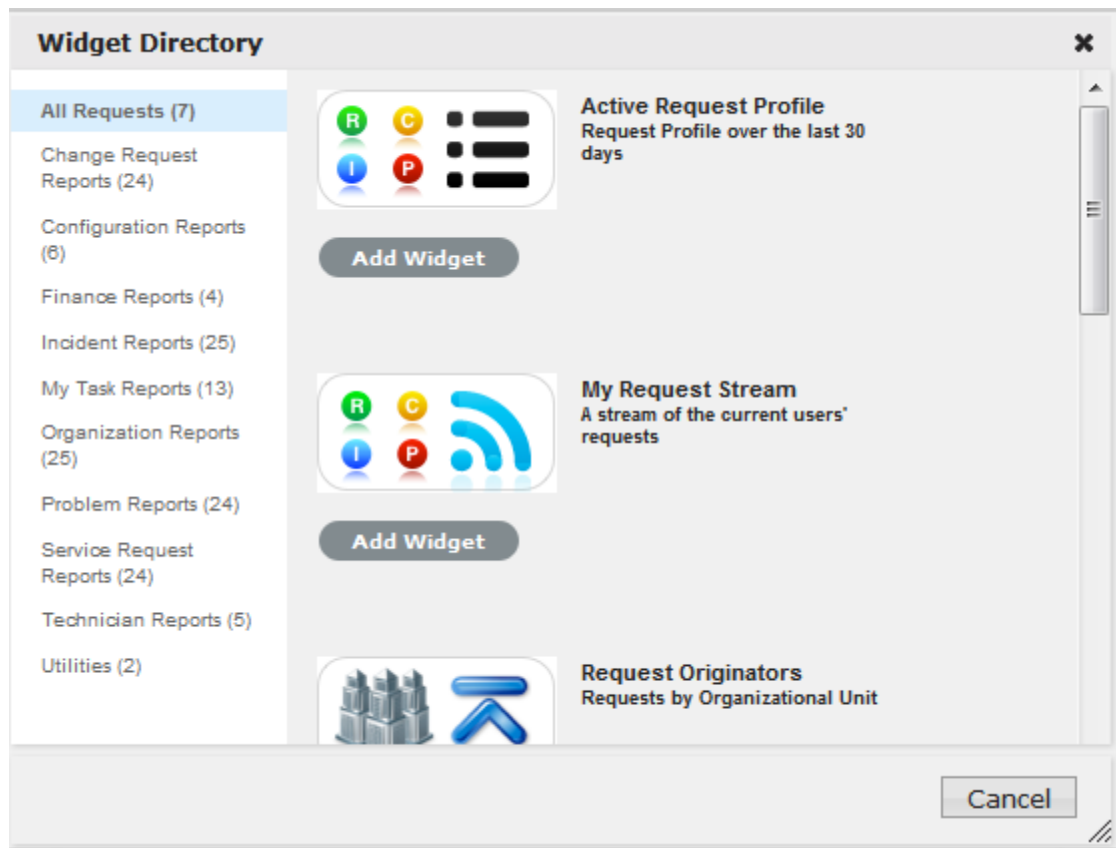
The Widget Directory is displayed with the categories across request types, Configuration Management, Finance and Utilities.

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 153](#)
- [“Deleting Alerts” on page 155](#)

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.

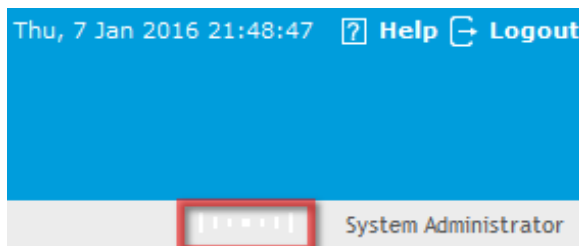
---

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.<br><br>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"> <li>◆ Information – for general Alerts</li> <li>◆ Warning – to warn Users of potential issues</li> <li>◆ Urgent – to publish an urgent actionable message.</li> </ul> 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"> <li>◆ Specific Customer or User - In the Find User or Customer list, click search to select the recipient from the drop-down list.</li> <li>◆ User Role - An Alert sent to a User Role will go to all Users with that Role.</li> <li>◆ Personal Alert - A personal Alert appears on the User's own screen at the Publish date.</li> <li>◆ Organizational Units - In the Find Org. Unit field, search and select the recipients.</li> <li>◆ Public - A Public Alert appears when the Public Alert link is selected on the Login Page.</li> </ul> |
| 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 

Cancel Save

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 156
- ♦ “Accept a Customer Chat” on page 157
- ♦ “Email Chat Button” on page 157
- ♦ “End Chat Button” on page 157
- ♦ “Request Note” on page 157

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.

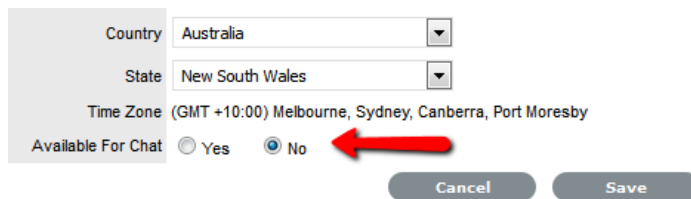
### Enable User Availability

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 a 'Time Zone' label with the text '(GMT +10:00) Melbourne, Sydney, Canberra, Port Moresby'. At the bottom, there is an 'Available For Chat' section with two radio buttons: 'Yes' and 'No'. The 'No' radio button is selected, and a red arrow points to it. Below the radio buttons 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



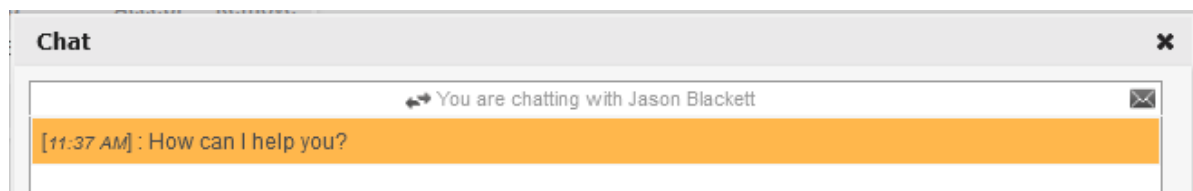
| Request | Description               | Customer       | Created        | Accept  | Remove  |
|---------|---------------------------|----------------|----------------|---|---|
| 100012  | unable to connect to Wifi | Jason Blackett | 01/08/16 17:03 |  |  |

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.

---

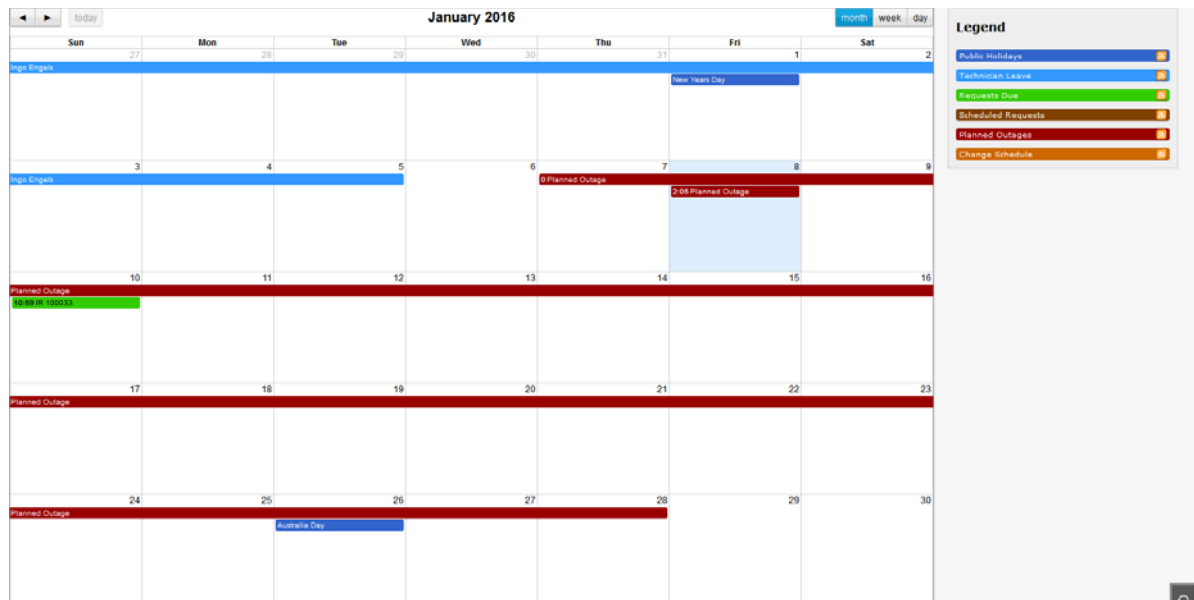
## 2.3.6 Calendar

- ◆ [“Subscribe to Calendars” on page 158](#)

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 159](#)

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.

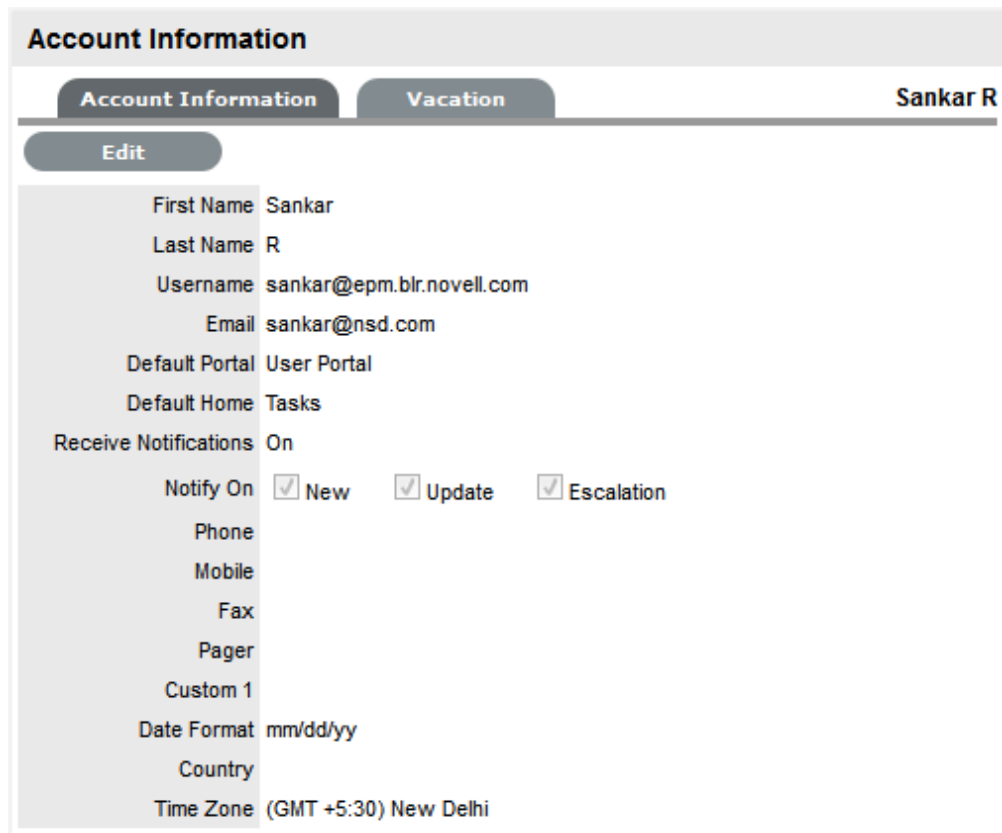
---

## 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 two tabs: 'Account Information' (selected) and 'Vacation'. Below the tabs 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.<br><br>(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.<br><br>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.  |

---

---

**Account Information**

---

|                    |   |
|--------------------|---|
| Date Format        | Preferred date format.  |
| 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

- ♦ [“Filters” on page 162](#)
- ♦ [“Scheduled Quick Calls” on page 162](#)
- ♦ [“Creating Quick Call Templates” on page 163](#)
- ♦ [“Applying Time Estimates to Workflow States” on page 166](#)
- ♦ [“Assigning a Solution Article to a Quick Call” on page 166](#)

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] Display: 10 |        |          |          |             |             |          |           |  |
| 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

## Filters

Following are the filters available. Using these filters, you can narrow down your quick call search:

- ♦ All QuickCalls: Displays all quick calls available in the system.
- ♦ QuickCalls: Displays all quick calls that are not scheduled and not assigned as a Group only quick calls.
- ♦ QuickCalls with Group Template: Displays all quick calls that are associated with Group Templates.
- ♦ Scheduled QuickCalls: Displays all the scheduled quick calls.

## 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 | Next | Next | Next |  |
| Laptop not booting          | Incident        | 10                                   | Open   | High     | 1        | N/A  | N/A  | N/A  | N/A  |  |
| Need Access to E-Learning   | Service Request | 10                                   | Open   | Medium   | 2        | N/A  | N/A  | N/A  | N/A  |  |
| Need Email Access           | Service Request | 10                                   | Open   | Medium   | 2        | N/A  | N/A  | N/A  | N/A  |  |
| Unable to login in Intranet | Incident        | 10                                   | Open   | High     | 0        | N/A  | N/A  | 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.
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              | If relevant, select an Item to assign to a Quick Call. This option is not visible when Contracts are enabled.<br><br><b>NOTE:</b> 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.   |
| 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: <a href="#">Workflows</a> .<br><br>**For Change Request Quick Calls, the ability to assign any stage of the Workflow to the Template, allows the RFCs created in the system using the Template to be pre-approved. |

| Options         | Description  |
|-----------------|--|
| 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><b>NOTE:</b> 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*           | <p>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.</p>   |
| Technician      | <p>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.</p>   |
| Impact*         | <p>The proposed impact the request has to a Customer or Organizational Unit.</p> <p>(This option is only visible if the Admin&gt;Setup&gt;Privileges&gt;Request&gt;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&gt;Setup&gt;Privileges&gt;Request&gt;Incident Priority is set to "Derived".)</p>  |
| Priority        | <p>If this field is editable, select the Priority that reflects the degree of impact and urgency of the issue. Alternatively, if the Admin&gt;Setup&gt;Privileges&gt;Request&gt;Incident Priority is set to "Derived" the Priority will be automatically calculated based on Impact and Urgency selected in the above two fields.</p>  |



| Options      | Description  |
|--------------|--|
| 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 to 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*    | <p>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.</p>   |
| Dynamic Form | <p>Click the search icon and then select the required dynamic form to associate with the Quick Call.</p> <p><b>IMPORTANT:</b> If the form is modified or deleted, then the existing request using that form will not be impacted.</p>  |
| Description* | <p>A description of the request.</p>   |
| Schedule     |  |
| Status       | <p>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.</p>  |
| Customer     | <p>Allows the template to be automatically associated with a Customer upon creation.</p>   |
| Interval     | <p>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.</p>   |
| Generation   | <p>Based on the Interval selected, define the month/ day/ time to generate the Quick Call.</p>   |
| Notification |  |
| Customer     | <p>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.</p>  |

| Options        | Description  |
|----------------|--|
| Customer CCs   | If relevant, enter the email details of any other Customers who must be notified regarding activity related to the request.  |
| 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 interface with two tabs: 'Description' and 'Impact'. The 'Impact' tab is active. Below the tabs, the text 'Status: Open' is displayed. To the right, the label 'Estimated Time' is followed by a text input field containing the value '30' and the unit 'minutes'. To the right of the input field are two buttons: 'Cancel' and 'Save'.

## 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 interface with three tabs: 'Description', 'Impact', and 'Solution'. The 'Solution' tab is active. Below the tabs, the text 'No solution has been selected' is displayed. To the right of this text is a button labeled 'New'.

## 2.3.9 Group Templates

- ♦ “Creating a Group Template” on page 167
- ♦ “Applying Group Templates” on page 170

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.

The screenshot shows the 'New Group Template' editor interface. It features a header with 'New Group Template' and two tabs: 'Group Details' (selected) and 'Group Analysis'. The 'Group Details' section includes a 'Group Name' text field, an 'Item Type' dropdown menu with a search box labeled 'Find Item Type (Name)', and several other dropdown menus: 'Priority' (set to 'Urgent'), 'Status' (set to 'Open'), and 'Notification' (set to 'None'). There is also an 'Access' checkbox labeled 'Customers' which is currently unchecked. Below these are three 'Custom' text input fields labeled 'Custom 1', 'Custom 2', and 'Custom 3'. The 'Description' section contains a rich text editor with a toolbar including options for 'Format', 'Font Family', 'Font Size', 'Link', 'Unlink', and 'HTML'. The toolbar also includes standard text formatting icons like bold, italic, underline, and text color. The description text area is currently empty. At the bottom of the editor, there is a 'Path: p' label and a 'Words:0' counter. Two buttons, 'Cancel' and 'Save', are located at the bottom right of the interface.

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 software interface for managing a Group Template named 'G1'. At the top, an information banner with a blue 'i' icon states 'Information: The Group Template has been saved successfully.' Below this, the 'Group Template - G1' header is visible, with two tabs: 'Group Details' and 'Group Analysis'. The 'Group Analysis' tab is active, displaying a table with one task. A dropdown menu is open on the left, showing options: 'New Quick Call' (highlighted), 'Laptop not booting', 'Unable to login in Intranet', 'Need Access to E-Learning', and 'Need Email Access'. The table has columns for Status, Priority, Classification, and Duration. The single task shown is 'In Progress', 'Medium' priority, 'Question' classification, and '12' duration. A 'Cancel' button is next to the dropdown, and 'Cancel' and 'Save' buttons are at the bottom right.

| Status      | Priority | Classification | Duration |
|-------------|----------|----------------|----------|
| In Progress | Medium   | Question       | 12       |

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 Dynamic Form

This page lists all the created dynamic form. Using this page, you can either create a dynamic form or delete an existing form.

The Dynamic Form tab is visible only when Quick Call privilege is enabled in Setup > Privileges > Requests > Enable Quick Call.

## Creating the Dynamic Form

To create a dynamic form, perform the following steps:

- 1 In the Dynamic Form page, click New.
- 2 In the Form Editor page, specify Name and Description for the form.
- 3 Using the Link With field, you can link the Dynamic Form with Quick Call, Incident, Service Request, Change Request, Problem and Store.
- 4 In the Form Builder section, based on requirements, drag and drop the form elements into the form canvas.  
Based on requirements, each form component can be customized.
- 5 After designing the dynamic form, click Save.

**IMPORTANT:** If the form is modified or deleted, then the existing request using that form will not be impacted.

Following are some of the form components that are available in Service Desk. Depending on which component you are using, the field components will be displayed.

- ◆ Text Field: The Text field can be used for short a short text input. Use the options to define input masks and validations, allowing users restrict the number of characters that a user can add in the field

| Options                       | Description  |
|-------------------------------|--|
| Display                       |  |
| Label                         | The label for this field.  |
| Placeholder                   | The placeholder text that will appear when this field is empty.  |
| Input Mask                    | An input mask helps the user with input by ensuring a predefined format.<br><br>9: numeric<br><br>a: alphabetical<br><br>*: alphanumeric<br><br>Example telephone mask: (999) 999-9999 |
| Disabled                      | Disable the form input.  |
| Data                          |  |
| Default Value                 | The will be the value for this field, before user interaction. Having a default value will override the placeholder text.  |
| Validation                    |  |
| Required                      | A required field must be filled in before the form can be submitted.   |
| Minimum Length                | The minimum length requirement this field must meet.   |
| Maximum Length                | The maximum length requirement this field must meet.   |
| Custom Error Message          | Error message displayed if any error occurred.   |
| Conditional                   |  |
| This Component Should Display | Enables conditional visibility of the field  |
| When the form component       | The visibility is dependent on another component defined within the form.  |
| Has the value                 | The logic is activated when the configured field contains the plaintext value defined in the settings.   |

- ◆ Number: The Number component can be used to limit users to specify only numbers.

| <b>Options</b>                | <b>Description</b>  |
|-------------------------------|---|
| Display                       |   |
| Label                         | The label for this field.   |
| Placeholder                   | The placeholder text that will appear when this field is empty.   |
| Disabled                      | Disable the form input.   |
| Data                          |   |
| Use Delimiter                 | Separate thousands by delimiter.  |
| Decimal Places                | The maximum number of decimal places.   |
| Require Decimal               | Always show decimals, even if trailing zeros. Default value is 20 places if "Decimal Places" is not defined.              |
| Default Value                 | The will be the value for this field, before user interaction. Having a default value will override the placeholder text. |
| Validation                    |   |
| Required                      | A required field must be filled in before the form can be submitted.  |
| Minimum Length                | The minimum length requirement this field must meet.  |
| Maximum Length                | The maximum length requirement this field must meet.  |
| Custom Error Message          | Error message displayed if any error occurred.  |
| Conditional                   |   |
| This Component Should Display | Enables conditional visibility of the field   |
| When the form component       | The visibility is dependent on another component defined within the form.   |
| Has the value                 | The logic is activated when the configured field contains the plaintext value defined in the settings.                    |

- ◆ Text Area: The Text area is similar to the text field. In the Text Area field allows multiple-line input.

| <b>Options</b> | <b>Description</b>  |
|----------------|---|
| Display        |   |
| Label          | The label for this field.                                       |
| Placeholder    | The placeholder text that will appear when this field is empty. |



| Options                       | Description   |
|-------------------------------|---|
| Rows                          | This allows control over how many rows are visible in the text area.  |
| Disabled                      | Disable the form input.   |
| Data                          |   |
| Default Value                 | The will be the value for this field, before user interaction. Having a default value will override the placeholder text. |
| Validation                    |   |
| Required                      | A required field must be filled in before the form can be submitted.  |
| Minimum Length                | The minimum length requirement this field must meet.  |
| Maximum Length                | The maximum length requirement this field must meet.  |
| Custom Error Message          | Error message displayed if any error occurred.  |
| Conditional                   |   |
| This Component Should Display | Enables conditional visibility of the field   |
| When the form component       | The visibility is dependent on another component defined within the form.   |
| Has the value                 | The logic is activated when the configured field contains the plaintext value defined in the settings.                    |

- ◆ Select Boxes: The Select boxes component is similar to Radio button, but allows multiple selection.

| Options       | Description   |
|---------------|---|
| Display       |   |
| Label         | The label for this field.   |
| Values        | Each entry under this section will represent a checkbox.  |
| Placeholder   | The placeholder text that will appear when this field is empty.   |
| Inline Layout | Displays the checkboxes horizontally.   |
| Disabled      | Disable the form input.   |
| Data          |   |
| Default Value | The will be the value for this field, before user interaction. Having a default value will override the placeholder text. |

| Options                       | Description  |
|-------------------------------|--|
| Validation                    |  |
| Required                      | A required field must be filled in before the form can be submitted.                                   |
| Minimum Length                | The minimum length requirement this field must meet.   |
| Custom Error Message          | Error message displayed if any error occurred.   |
| Conditional                   |  |
| This Component Should Display | Enables conditional visibility of the field  |
| When the form component       | The visibility is dependent on another component defined within the form.                              |
| Has the value                 | The logic is activated when the configured field contains the plaintext value defined in the settings. |

- ◆ Radio: The Radio component enables you to display a list, but users can select only one option.

| Options                       | Description   |
|-------------------------------|---|
| Display                       |   |
| Label                         | The label for this field.   |
| Values                        | Each entry under this section will represent a checkbox.  |
| Placeholder                   | The placeholder text that will appear when this field is empty.   |
| Disabled                      | Disable the form input.   |
| Data                          |   |
| Default Value                 | The will be the value for this field, before user interaction. Having a default value will override the placeholder text. |
| Validation                    |   |
| Required                      | A required field must be filled in before the form can be submitted.  |
| Custom Error Message          | Error message displayed if any error occurred.  |
| Conditional                   |   |
| This Component Should Display | Enables conditional visibility of the field   |
| When the form component       | The visibility is dependent on another component defined within the form.   |
| Has the value                 | The logic is activated when the configured field contains the plaintext value defined in the settings.                    |

- ◆ Select: The Select components displays list of values in a drop-down list and users can select one of the values in the list.

| Options                       | Description   |
|-------------------------------|---|
| Display                       |   |
| Label                         | The label for this field.   |
| Placeholder                   | The placeholder text that will appear when this field is empty.   |
| Disabled                      | Disable the form input.   |
| Data                          |   |
| Data Source Values            | Each entry under this section will represent an entry in the drop-down list.  |
| Item Template                 | The HTML template for the data items to determine how the values will be displayed in the select box                      |
| Enable Static Search          | Enables searching within the list of items in the drop-down.  |
| Default Value                 | The will be the value for this field, before user interaction. Having a default value will override the placeholder text. |
| Validation                    |   |
| Required                      | A required field must be filled in before the form can be submitted.  |
| Minimum Length                | The minimum length requirement this field must meet.  |
| Minimum Value                 | The minimum length requirement this field must meet.  |
| Custom Error Message          | Error message displayed if any error occurred.  |
| Conditional                   |   |
| This Component Should Display | Enables conditional visibility of the field   |
| When the form component       | The visibility is dependent on another component defined within the form.   |
| Has the value                 | The logic is activated when the configured field contains the plaintext value defined in the settings.                    |

- ◆ Email: The Email component is similar to the text field component. This field has custom validation to ensure correct value is provided.

| Options | Description |
|---------|-------------|
| Display |             |

| Options                       | Description   |
|-------------------------------|---|
| Label                         | The label for this field.   |
| Placeholder                   | The placeholder text that will appear when this field is empty.   |
| Disabled                      | Disable the form input.   |
| Data                          |   |
| Default Value                 | The will be the value for this field, before user interaction. Having a default value will override the placeholder text. |
| Validation                    |   |
| Required                      | A required field must be filled in before the form can be submitted.  |
| Custom Error Message          | Error message displayed if any error occurred.  |
| Conditional                   |   |
| This Component Should Display | Enables conditional visibility of the field   |
| When the form component       | The visibility is dependent on another component defined within the form.   |
| Has the value                 | The logic is activated when the configured field contains the plaintext value defined in the settings.                    |

- ◆ URL: The URL component is also similar to the text field, where you can provide a link to website.

| Options     | Description  |
|-------------|--|
| Display     |  |
| Label       | The label for this field.  |
| Placeholder | The placeholder text that will appear when this field is empty.  |
| Input Mask  | An input mask helps the user with input by ensuring a predefined format.<br><br>9: numeric<br><br>a: alphabetical<br><br>*: alphanumeric<br><br>Example telephone mask: (999) 999-9999 |
| Disabled    | Disable the form input.  |
| Data        |  |

| Options                       | Description   |
|-------------------------------|---|
| Default Value                 | The will be the value for this field, before user interaction. Having a default value will override the placeholder text. |
| Validation                    |   |
| Required                      | A required field must be filled in before the form can be submitted.  |
| Custom Error Message          | Error message displayed if any error occurred.  |
| Conditional                   |   |
| This Component Should Display | Enables conditional visibility of the field   |
| When the form component       | The visibility is dependent on another component defined within the form.   |
| Has the value                 | The logic is activated when the configured field contains the plaintext value defined in the settings.                    |

- ◆ Phone Number: The Phone number component is similar to the number component.

| Options              | Description  |
|----------------------|--|
| Display              |  |
| Label                | The label for this field.  |
| Placeholder          | The placeholder text that will appear when this field is empty.  |
| Input Mask           | An input mask helps the user with input by ensuring a predefined format.<br><br>9: numeric<br>a: alphabetical<br>*: alphanumeric<br><br>Example telephone mask: (999) 999-9999 |
| Disabled             | Disable the form input.  |
| Data                 |  |
| Default Value        | The will be the value for this field, before user interaction. Having a default value will override the placeholder text.  |
| Validation           |  |
| Required             | A required field must be filled in before the form can be submitted.   |
| Custom Error Message | Error message displayed if any error occurred.   |
| Conditional          |  |

| Options                       | Description  |
|-------------------------------|--|
| This Component Should Display | Enables conditional visibility of the field  |
| When the form component       | The visibility is dependent on another component defined within the form.                              |
| Has the value                 | The logic is activated when the configured field contains the plaintext value defined in the settings. |

- ◆ Date / Time: The Date / Time component can be used to input dates and times.

| Options              | Description  |
|----------------------|--|
| Display              |  |
| Label                | The label for this field.  |
| Display In Timezone  |  |
| Use Locale Settings  |  |
| Allow Manual Input   |  |
| Format               |  |
| Placeholder          |  |
| Disabled             |  |
| Date                 |  |
| Enable Date Input    | Enables date input for this field.   |
| Minimum Date         | The minimum date that can be picked. You can also use Moment.js functions. For example: <code>moment().subtract(10, 'days')</code> |
| Maximum Date         | The maximum date that can be picked. You can also use Moment.js functions. For example: <code>moment().add(10, 'days')</code>      |
| Time                 |  |
|                      |  |
|                      |  |
|                      |  |
| Time                 |  |
| Enable Time Input    | Enables time input for this field.   |
| Hour Step Size       | The number of hours to increment/decrement in the time picker.   |
| Minute Step Size     | The number of minutes to increment/decrement in the time picker.   |
| 12 Hour Time (AM/PM) | Display time in 12 hour time with AM/PM.   |

| Options   | Description   |
|---|---|
| Data  |   |
| Default Value   | The will be the value for this field, before user interaction. Having a default value will override the placeholder text. |
| <ul style="list-style-type: none"> <li>◆ Currency: The currency component similar to the number component and allows decimal values.</li> </ul> |   |
| Options   | Description   |
| Display   |   |
| Label   | The label for this field.   |
| Placeholder   | The placeholder text that will appear when this field is empty.   |
| Disabled  | Disable the form input.   |
| Data  |   |
| Currency  | The currency to use in currency formatting. Possible values are (ISO-4217) currency codes.                                |
| Default Value   | The will be the value for this field, before user interaction. Having a default value will override the placeholder text. |
| Validation  |   |
| Required  | A required field must be filled in before the form can be submitted.  |
| Custom Error Message  | Error message displayed if any error occurred.  |
| Conditional   |   |
| This Component Should Display   | Enables conditional visibility of the field   |
| When the form component   | The visibility is dependent on another component defined within the form.   |
| Has the value   | The logic is activated when the configured field contains the plaintext value defined in the settings.                    |

## Deleting the Dynamic Form

To delete a dynamic form, select the check box adjacent to the form, and then click Delete.

## 2.3.11 Feedback

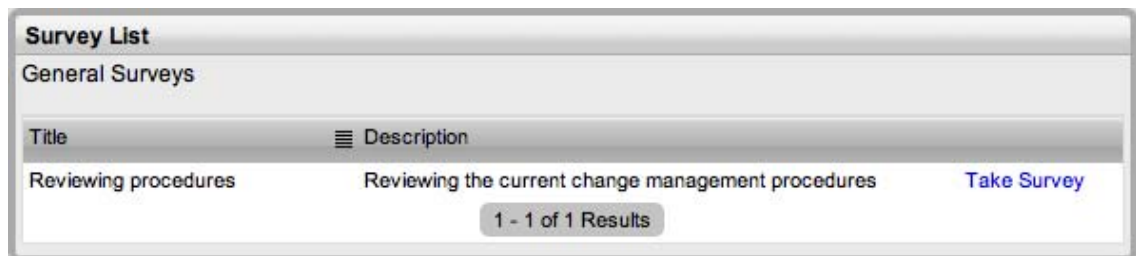
- ♦ “Completing a Survey” on page 180

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

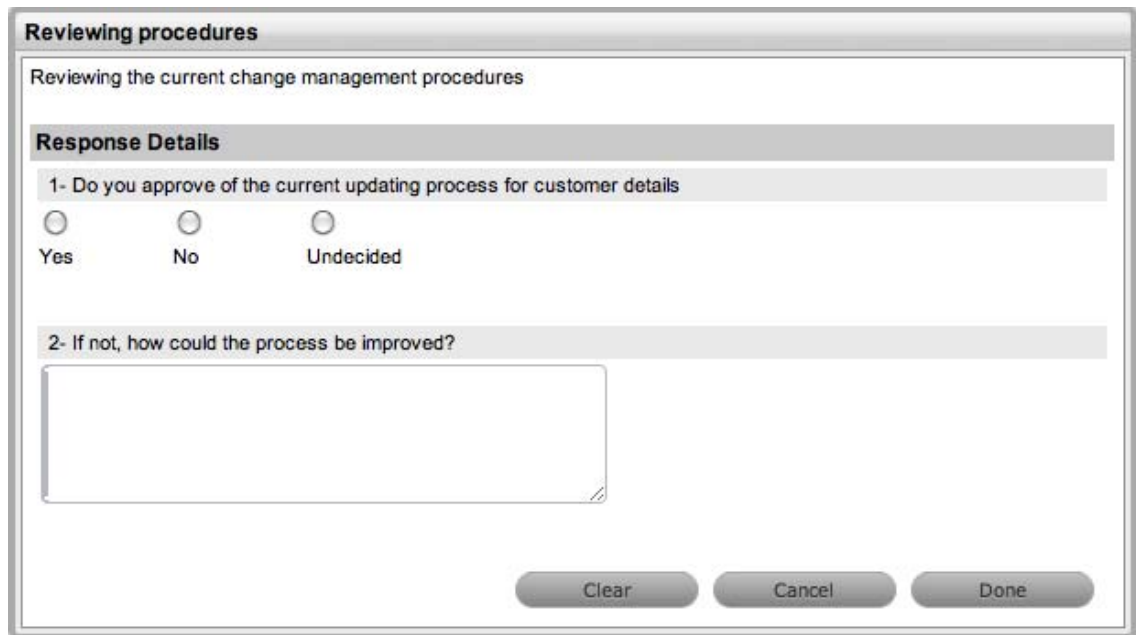
When a Survey is published, it can be completed by Users and Customers. To complete a Survey as a Supervisor or Technician User:

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



The screenshot shows a window titled "Survey List" with a sub-header "General Surveys". Below this is a table with two columns: "Title" and "Description". The table contains one row with the title "Reviewing procedures" and the description "Reviewing the current change management procedures". To the right of the description is a blue hyperlink labeled "Take Survey". Below the table, a status bar indicates "1 - 1 of 1 Results".

3. Complete the Survey



The screenshot shows a survey form titled "Reviewing procedures" with the subtitle "Reviewing the current change management procedures". Under the heading "Response Details", there is a question: "1- Do you approve of the current updating process for customer details". Below the question are three radio button options: "Yes", "No", and "Undecided". Below these options is another question: "2- If not, how could the process be improved?". This question is followed by a large text input field. At the bottom of the form are three buttons: "Clear", "Cancel", and "Done".

4. Click Done.



## 2.4 Operations

- ◆ [Section 2.4.1, “Request Fulfillment,” on page 181](#)
- ◆ [Section 2.4.2, “Incident Management,” on page 303](#)
- ◆ [Section 2.4.3, “Problem Management,” on page 378](#)
- ◆ [Section 2.4.4, “Problem Assignment and Escalation,” on page 423](#)
- ◆ [Section 2.4.5, “Billing/Contracts,” on page 428](#)
- ◆ [Section 2.4.6, “Known Errors,” on page 428](#)

### 2.4.1 Request Fulfillment

- ◆ [“Overview” on page 181](#)
- ◆ [“Creating a User Account \(Internal Authentication\)” on page 184](#)
- ◆ [“Service Requests” on page 198](#)
- ◆ [“Service Request Groups” on page 293](#)
- ◆ [“Creating a New Group via the Request Groups Tab” on page 293](#)
- ◆ [“Creating a Service Request Group using a Group Template” on page 295](#)
- ◆ [“Analysis Tab” on page 299](#)
- ◆ [“Elements Tab” on page 300](#)
- ◆ [“Merging Service Request Groups” on page 300](#)
- ◆ [“Closing a Request Group” on page 301](#)
- ◆ [“Duplicated Service Requests” on page 302](#)

#### Overview

- ◆ [“Implementing Request Fulfillment” on page 182](#)

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](#).

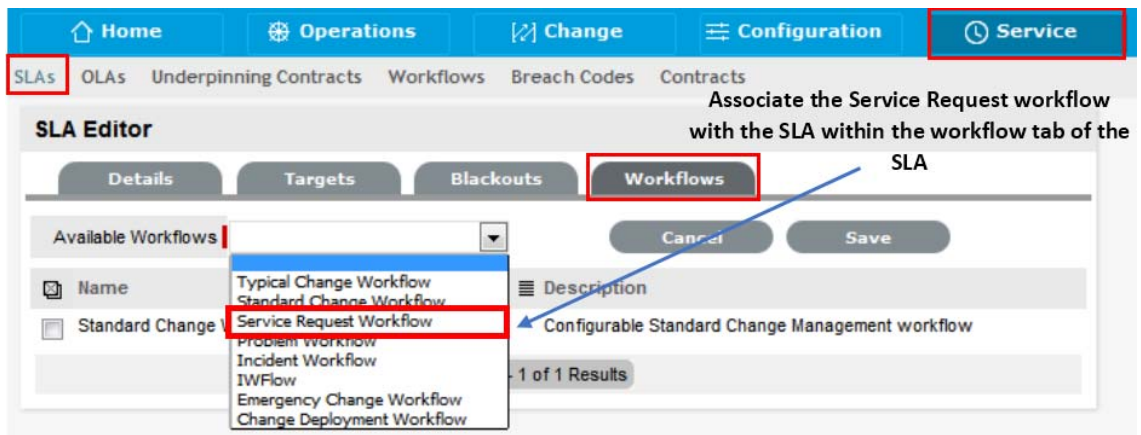
## Implementing Request Fulfillment

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

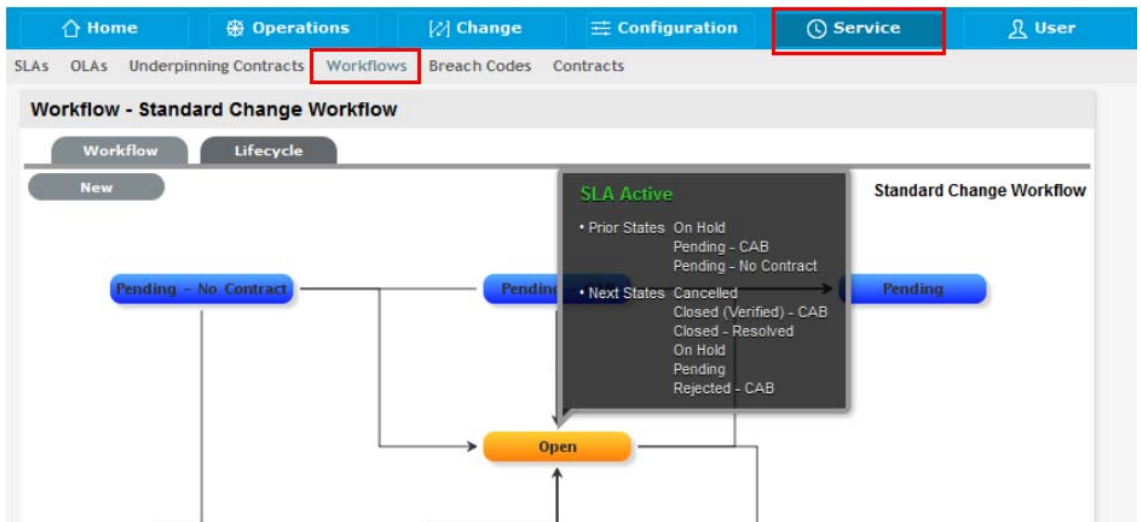
1. Assign the Request Process to the relevant Users within the User Information screen under the User>Users tab. (See:[Create a User](#).)

The screenshot shows the 'User Information' screen for a user named Joe K. The 'Users' tab is selected in the top navigation bar. The 'User Information' screen has several tabs: Information, Schedule, Aliases, Team, Skills, and Org Unit. The 'Information' tab is active. There are buttons for 'Email' and 'vCard'. The 'Roles' section has checkboxes for Supervisor, Administrator, Customer, Technician (checked), Manager, Partner, and Finance. The 'Default Portal' is set to 'User Portal'. The 'Operations Processes' section has checkboxes for Request (checked), Incident (checked), and Problem (checked). The 'Change Processes' section has checkboxes for Change (checked), Release (checked), and Deployment (checked). The 'Internal Processes' section has checkboxes for Service Level (checked), Configuration (checked), and Knowledge (checked). A blue arrow points from the text 'Assign the request process to the User within the User information Screen' to the 'Request' checkbox.

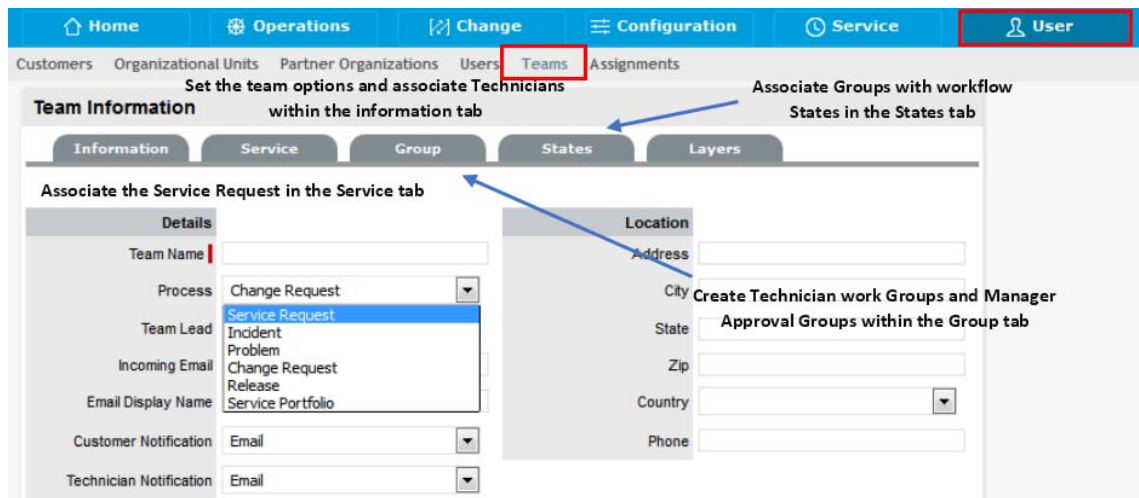
2. Create or review the SLA within the Service>SLAs tab, and associate the Incident Service Request Workflow to the SLA in the SLAs Workflow tab. (NB: The Supervisor User setting up the SLA must be assigned the Internal Process of Service Level in their User Information screen to complete this action.)



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 unique user name.  |
| 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 <a href="#">User Roles</a> .<br><br>Every Technician Role assigned also needs a Supervisor assigned.<br><br><b>NOTE:</b> 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.<br><br><b>NOTE:</b> 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.<br><br>Select a template to assign the new User to multiple Teams, Escalation layers and Processes.   |

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---

## User Information Fields

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|                      |   |
|----------------------|---|
| 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 <a href="#">User Processes</a>.</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><b>NOTE:</b> 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

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|                 |   |
|-----------------|---|
| 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"><li>◆ From the drop down list, select the SMS service provider.</li><li>◆ Override SMS Address. If your service provider does not appear in the list, click this checkbox and enter an alternate Service Provider.</li></ul> |
| SMS Override    | 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@smgateway.provider.com.  |
| 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.   |

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## User Information Fields

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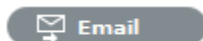
|              |  |
|--------------|--|
| Partner      | If the User is also assigned a Customer Role, this field allows the Customer to be associated with a Partner Organization who will handle their requests when they are logged in the system.   |
| Available    | Shows if the User is available for 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.<br><br>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.   |

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\* Denotes Mandatory Fields

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

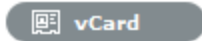
## Emailing User Details





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.

**User Information**

Information
Schedule
Aliases
Team
Skills
Org Unit

**Ingo Engels**

**Working Hours**

Relative To (GMT +5:30) New Delhi

Apply Template

Sunday <unavailable> to <unavailable>

Monday 09:00 to 17:00

Tuesday 09:00 to 17:00

Wednesday 09:00 to 17:00

Thursday 09:00 to 17:00

Friday 09:00 to 17:00

Saturday <unavailable> to <unavailable>

**Holidays**

On Vacation  No  Yes

Schedule

| Purpose            | Start Date | End Date | Active |
|--------------------|------------|----------|--------|
| 0 - 0 of 0 Results |            |          |        |

### 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.


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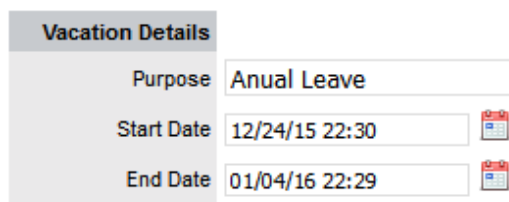
### Schedule Holidays



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:

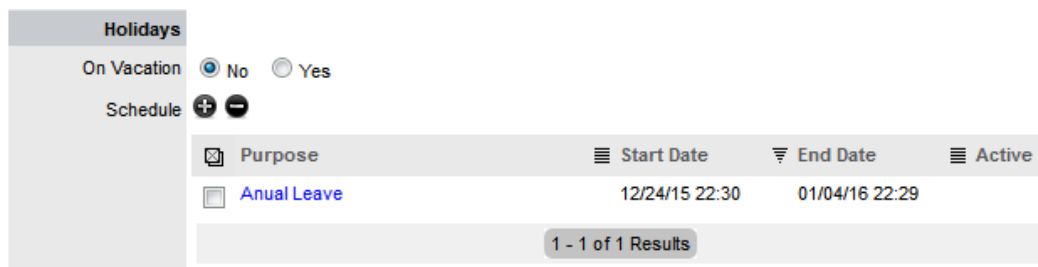
1. Go to the Users>User option
2. Select the hyperlink name of the User
3. Move to the Schedule tab
4. Click Edit
5. Select 
- The Vacation Details window is expanded.
6. Enter the reason for leave in the Purpose box







|                         |  |
|-------------------------|--|
| <b>Vacation Details</b> |  |
| 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

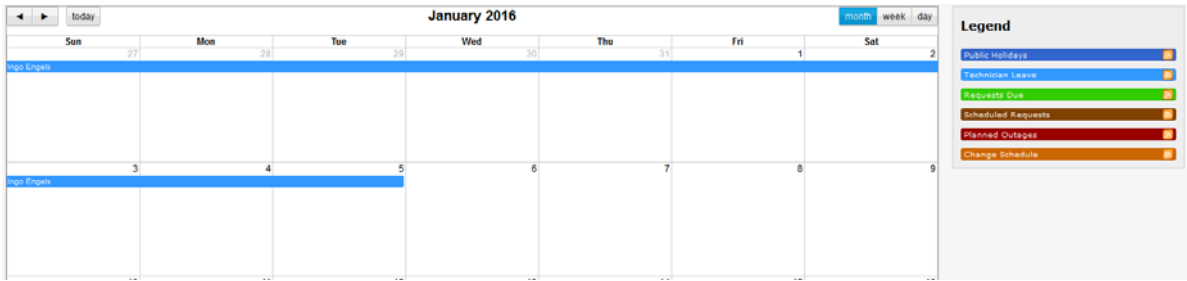
The details are recorded in the database and when the Start Date is reached, new requests will not be assigned to the User. After the scheduled End Date, the User account will be automatically re-activated.



| <b>Holidays</b>  |   |   |        |
|--|---|---|--------|
| On Vacation  | <input checked="" type="radio"/> No   | <input type="radio"/> 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.

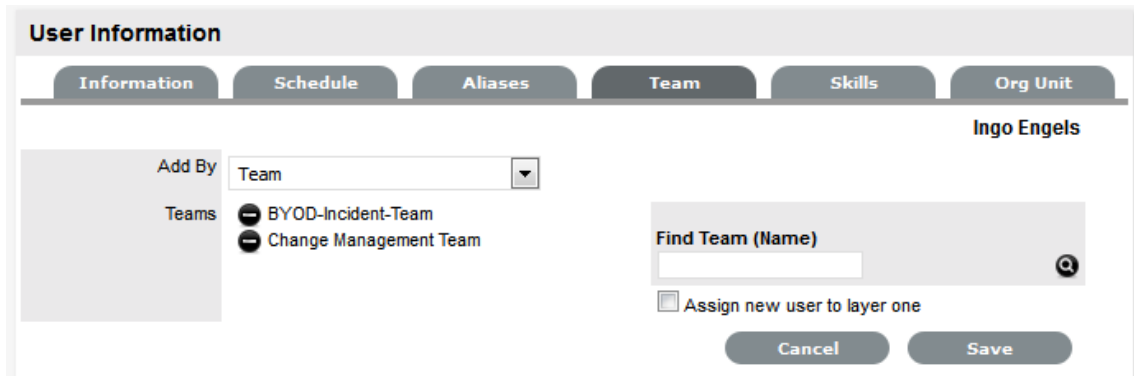
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**NOTE:** The User must be assigned the relevant Processes for Support Teams to be shown in Team search results. If an Assignment template is selected and includes Teams for Processes the current User is not allocated, those Teams will not be included 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 a sidebar with 'Add By' set to 'Team' and a list of teams: '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' interface with the 'Team' tab active. The 'Add By' dropdown menu is set to 'Team Template'. Below it, the 'Templates' dropdown menu is currently 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' interface with the 'Team' tab active. The 'Add By' dropdown menu is set to 'Team Template'. Below it, the 'Templates' dropdown menu is set to 'New Template'. A table is displayed with one row, showing 'Team Name' and 'Layer' columns. The user's name, 'Ingo Engels', is displayed in the top right corner. 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, 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 with the 'Skills' tab selected. The user 'Ingo Engels' is identified. The 'Item Category' dropdown is empty. Below the form are 'Cancel' and 'Save' buttons. A table below the form has columns for 'Classification', 'Item Category', and 'Item Type', with a '0 - 0 of 0 Results' indicator.

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 with the 'Skills' tab selected. The user 'Ingo Engels' is identified. The 'Item Category' dropdown is set to 'Hardware', 'Item Type' is set to 'Dell Latitude E6430', and 'Classification' is set to '\*'. A dropdown menu is open below 'Classification', showing a list of classification types: '\*', 'Configuration', 'Downloads', 'General', 'Manuals', and 'Network'. The table below the form shows '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.

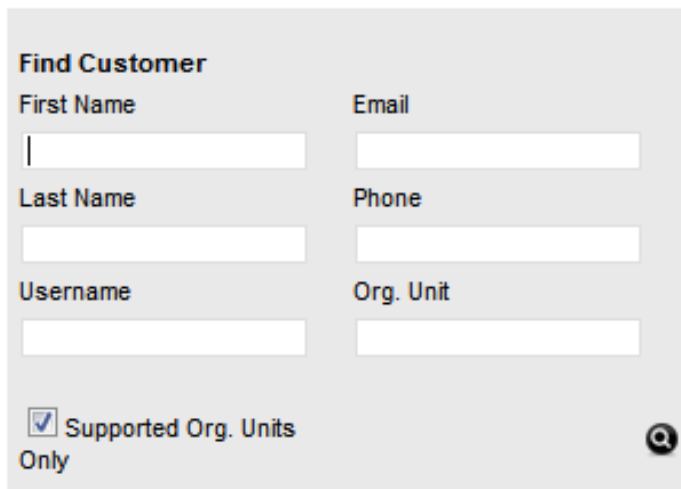
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To remove a Classification:

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: First Name, Email, Last Name, Phone, Username, and Org. Unit. At the bottom left, there is a checkbox labeled "Supported Org. Units Only" which is checked. A magnifying glass icon is located at the bottom right of the form.

## 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 selected. Below the tabs, there is a search field labeled 'Find Org. Unit (Name)' with a magnifying glass icon and a 'Save' button. The 'Org. Units' section is currently empty.

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 199
- ◆ “Service Request Queue” on page 199
- ◆ “Service Request Search Tips:” on page 199
- ◆ “RSS Feeds” on page 200
- ◆ “Queues for requests” on page 200
- ◆ “Customer Tab” on page 205
- ◆ “Advanced Search Option” on page 207
- ◆ “Item Information” on page 209
- ◆ “Creating an Item during request creation” on page 211
- ◆ “Quick Calls” on page 230
- ◆ “Contract Tab” on page 232
- ◆ “Details Tab” on page 233
- ◆ “Analysis Tab” on page 234
- ◆ “Summary Tab” on page 257
- ◆ “Notes Tab” on page 264
- ◆ “Attach Tab” on page 270
- ◆ “Impact Tab” on page 271
- ◆ “Audit Tab” on page 275
- ◆ “Item Relationships” on page 276
- ◆ “Related Requests” on page 281
- ◆ “Managing Related Requests” on page 283
- ◆ “Billing: Contracts and Invoices” on page 287



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. |

| Filter                             | Description   |
|------------------------------------|---|
| 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.  |
| 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<br><br>(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.

---

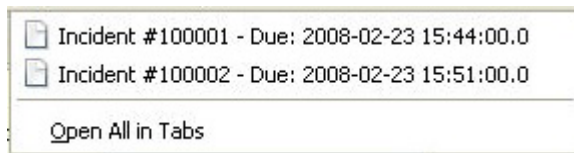
**NOTE:** For information regarding request assignment, reviewing a request, adding notes or updating the status, refer to [Working on a Request.](#)

---

## 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.

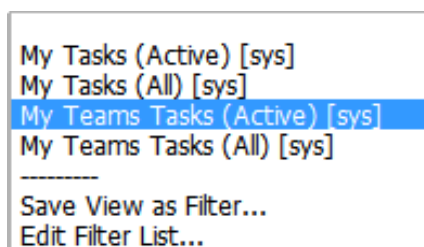
The following is an example of the information obtained by clicking on the RSS bookmark:



## 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.

Escalation  On  Off  
Escalation Layer (Layer 1 of 1)  
Technician Jill Brown  
Jill Brown  
System User

### ***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

**Privileges**

User Customer Requests System

Requests

Enable Escalation Control Yes No

→ Queues On Off

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   | Location |
|---|----------|
| Team Name   BYOD-Incident-Team  | Address  |
| Process   Incident  | City     |
| Team Lead   Joe K   | State    |
| Incoming Email  | Zip      |
| Email Display Name  | Country  |
| Customer Notification   Email   | Phone    |
| Technician Notification   Email   |          |
| Live Priority <input type="radio"/> On <input checked="" type="radio"/> Off   |          |
| Self Assign <input type="radio"/> On <input checked="" type="radio"/> Off   |          |
| Notify on New <input checked="" type="radio"/> Technician <input type="radio"/> Layer <input type="radio"/> Team      |          |
| Notify on Update <input checked="" type="radio"/> Technician <input type="radio"/> Layer <input type="radio"/> Team   |          |
| Notify on Escalate <input checked="" type="radio"/> Technician <input type="radio"/> Layer <input type="radio"/> Team |          |
| Incident Queue <input checked="" type="radio"/> On <input type="radio"/> Off  |          |
| Queue Visibility <input checked="" type="radio"/> Entry States <input type="radio"/> All States                       |          |
| Edit Assign <input type="radio"/> Yes <input checked="" type="radio"/> No   |          |
| Close Assign <input checked="" type="radio"/> Yes <input type="radio"/> No  |          |

**Members**

Technicians

| Available Technicians                               | Selected Technicians |
|---|----------------------|
| Craig Wilson<br>Kamal K<br>Sankar R<br>Vaibhav Jain | Ingo Engels<br>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: <a href="#">Queues</a>.</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: <a href="#">Queues</a>.</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.

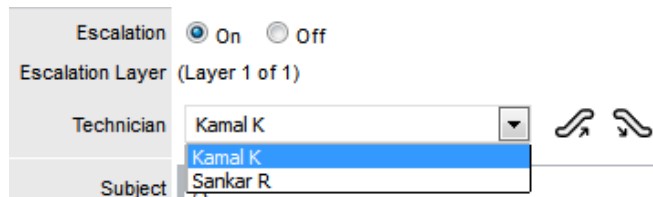
9. Select Save.

### ***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.



Escalation  On  Off  
Escalation Layer (Layer 1 of 1)  
Technician Kamal K  
Subject Sankar R

4. Click Save.

### ***Reassign a request to the Queue***

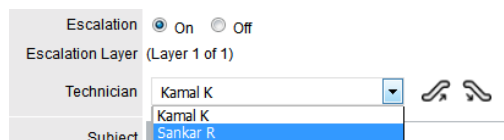
When the All States option has been enabled for the Queue within the Team Information screen, the System User will be retained in the Technician drop-down list for the first layer of escalation after it has been assigned to a User. This allows the assigned User to re-assign the request back to the Queue.

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.



Escalation  On  Off  
Escalation Layer (Layer 1 of 1)  
Technician Kamal K  
Subject Sankar R

4. Click Save
5. Click Done.

The system returns to the request list view.



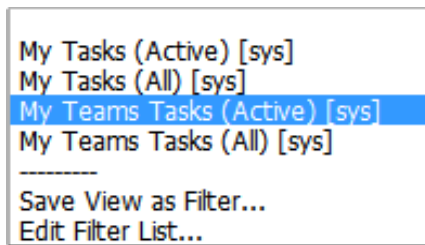
## Queue Filter

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 206](#)
- ♦ [“Create a Request for a new Customer” on page 206](#)

- ◆ “Requests for Partner Organization Customers” on page 207
- ◆ “Supported Org Units Only option” on page 207

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.

**Request Information**

Customer Details

**Find Customer**

First Name  Email

Last Name  Phone

Username  Org. Unit

Supported Org. Units Only

| Name                           | Phone | Org Unit                             |
|--------------------------------|-------|--------------------------------------|
| <a href="#">James Stewart</a>  |       | Micro Focus - Information Technology |
| <a href="#">Jason Blackett</a> |       | 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 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***

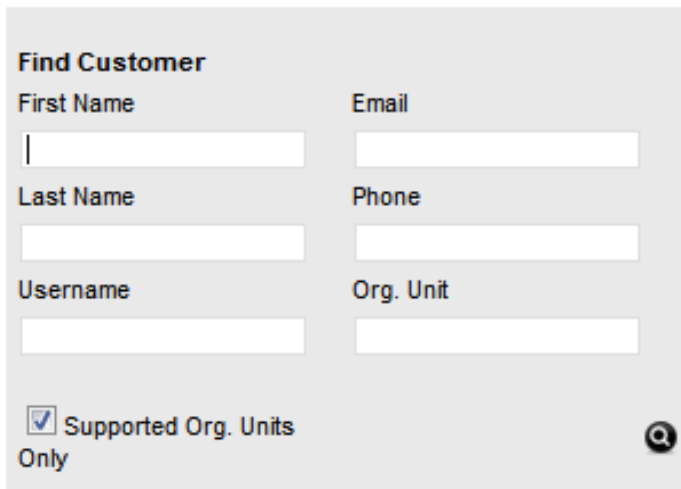
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**NOTE:** When a Request is created for a Customer of a Partner Organization it is automatically allocated to the Partner User associated with the Partner Organization.

---

### ***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.



The screenshot shows a search form titled "Find Customer". It contains six input fields arranged in two columns: First Name, Email, Last Name, Phone, Username, and Org. Unit. At the bottom left, there is a checked checkbox labeled "Supported Org. Units Only". A magnifying glass icon is located at the bottom right of the form.

### **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

Active Items Only

Category  
Mobile Devices

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

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 210](#)
- ◆ [“Request Item Assignment” on page 210](#)

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 displays the 'Request Information' interface. On the left, the 'Customer' tab is active, showing details for James Stewart, including his name, organizational unit (Micro Focus - Information Technology), email (james@nsd.com), and various contact information fields. On the right, the 'Find Item' section is visible, featuring search filters such as 'Include Global\* Items' and 'Active Items Only', a 'Category' dropdown set to 'Mobile Devices', and an 'Advanced Search' checkbox. Below these filters is a table with columns for 'Item #', 'Item Type', 'Identifier', and 'Status'. Two items are listed: 'Service Desk' (Service Desk, Available) and 'Wifi Service' (WIFI Service, Available). A 'Cancel' button is located at the bottom right of the interface.

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.

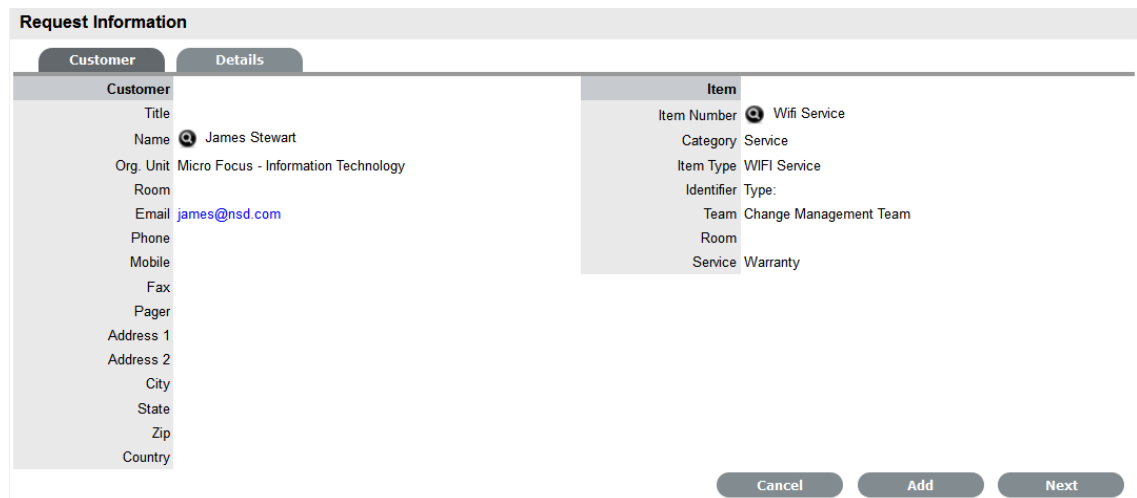
## Request Item Assignment

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 the 'Request Information' screen 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 screen, there 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.

| Selections                    |              |              |
|-------------------------------|--------------|--------------|
| Customer                      | Item No.     | Item Type    |
| <a href="#">James Stewart</a> | 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.

### Creating an Item during request creation

To create a new Item for the Customer after they have been assigned to the request:

- Move to the Find Item field

**Find Item**

Item Number

Item Type

Include Global\* Items

Active Items Only

Category: Mobile Devices

Advanced Search

Item Type Selections:

- All Items
- All Assigned Items
- By Customer
- By Org. Unit

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.

3. Enter the Item Type Name in the Find field, or leave empty and click
4. Select the Item Type hyperlink to assign the details to the new Item
5. Enter other required information
6. 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.



**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)**

Cancel
Next

| Item         | Description  |
|--------------|--|
| Item Number* | <p>If the Administrator has set the Item Numbers Editable option in Setup&gt; Privileges&gt; 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 data-bbox="894 636 1438 758">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 data-bbox="915 777 1422 972" style="list-style-type: none"> <li data-bbox="915 777 1422 867">1. Enter a Customer last name, or leave blank then click the Search button to view a list of all available Customers.</li> <li data-bbox="915 886 1422 972">2. Click on the hyperlink for the relevant Customer name or names to assign them to the Item.</li> </ol> <p data-bbox="894 1001 1438 1058">If no specific Customer is allocated to the Item, it becomes a Global Item and is assigned to Everyone.</p>  |
| Customers     | <p data-bbox="894 1087 1438 1178">These are the Org Units who own the Item. The Item can be assigned to one or multiple Organizational Units.</p> <p data-bbox="894 1205 1127 1232">To assign an Org Unit:</p> <ol data-bbox="915 1251 1422 1446" style="list-style-type: none"> <li data-bbox="915 1251 1422 1341">1. Enter an Org Unit name, or leave blank then click the Search button to view a list of available Org Units.</li> <li data-bbox="915 1360 1422 1446">2. Click on the hyperlink for the relevant Org Unit name or names to assign them to the Item.</li> </ol> <p data-bbox="948 1465 1438 1646"><b>NOTE:</b> 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: <a href="#">Primary Contact</a>.)</p> |
| Org Units     | <p data-bbox="337 1675 464 1703">Notification</p> <p data-bbox="337 1730 423 1757">Method</p> <p data-bbox="894 1730 1438 1877">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](#).

The screenshot shows the 'Item Information' form with the 'Details' tab selected. The form has a header with tabs for Information, Details, Costs, Requests, Relationships, Outages, and AMIE Snapshots. Below the tabs are buttons for Edit, Duplicate, and Print. The 'Item # Service Desk (Service Desk)' is displayed in the top right. The 'Details' section is divided into two columns. The left column contains fields for Business Unit, Type, and Environment. The right column contains fields for Date Responsible, Date Activated, and Contact. Below the details section are tabs for Description, Notes, Attachments, and Audit Trail. The 'Description' tab is active, showing a text area with the placeholder text 'Description entered here is displayed in the customer portal.' A 'Done' button is located at the bottom right of the form.

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).

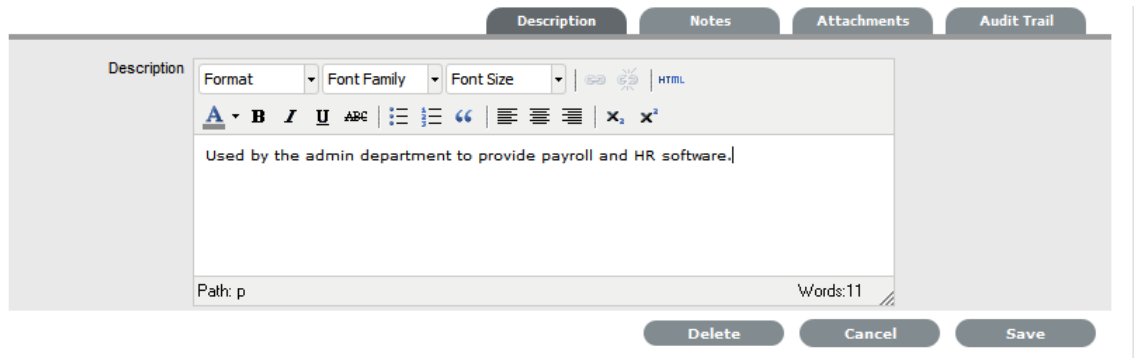
---

### **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



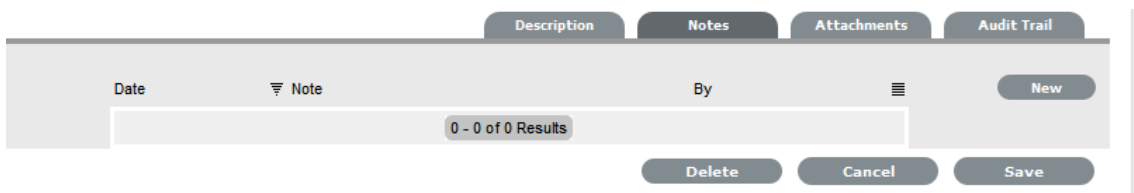
The screenshot shows a web interface for editing an item's description. At the top, there are four tabs: "Description" (selected), "Notes", "Attachments", and "Audit Trail". Below the tabs is a rich text editor. The editor has a toolbar with options for "Format", "Font Family", "Font Size", "Link", "Unlink", "HTML", "Text Color", "Background Color", "Bold", "Italic", "Underline", "Text Color", "List", "List", "Quote", "Align", "Align", "Align", "Link", and "Unlink". The text area contains the text "Used by the admin department to provide payroll and HR software." Below the text area, there is a "Path: p" label and a "Words:11" counter. At the bottom right, there are three buttons: "Delete", "Cancel", and "Save".

4. Click Save.

### **Item Notes**

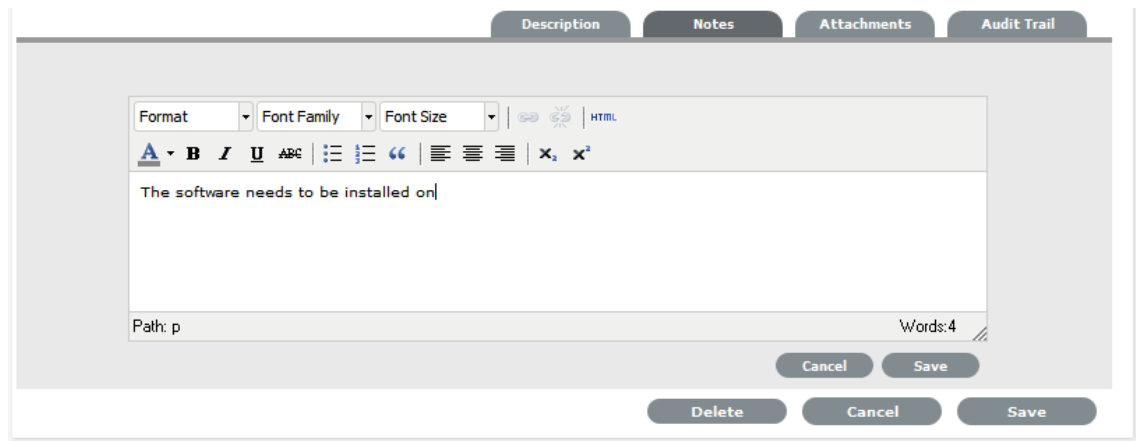
To add Notes to an Item, under the Item's Details tab:

1. Click Edit
2. Select the Notes tab



The screenshot shows a web interface for editing an item's notes. At the top, there are four tabs: "Description", "Notes" (selected), "Attachments", and "Audit Trail". Below the tabs is a table with columns for "Date", "Note", and "By". There is a "New" button on the right. Below the table, there is a search bar with the text "0 - 0 of 0 Results". At the bottom right, there are three buttons: "Delete", "Cancel", and "Save".

3. Click New
4. Enter details in the Notes field



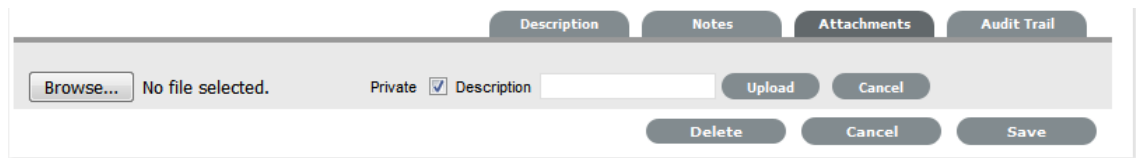
5. Click Save.

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

The screenshot shows the 'Item Information' interface with the 'Outages' tab selected. A 'New' button is located on the left. The item number is 'Item Number 1000 (WIFI Service)'. Below the tabs, there is a table header with columns: No., Start Date, End Date, Reason, and By. A search bar below the header shows '0 - 0 of 0 Results'. 'Cancel' and 'Save' buttons are at the bottom right.

6. Click New

The screenshot shows the 'Item Information' interface with the 'Outage Editor' screen expanded. The 'Details' tab is selected. The 'Interval' is set to 'One Time'. The 'Start Date' and 'End Date' fields are empty, and the 'Reason' field is a large text area. 'Cancel' and 'Save' buttons are at the bottom right.

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 a configuration form for an outage notification. It includes a 'Notification' section with a dropdown menu set to 'Email' and another dropdown set to 'Primary Contacts'. Below this is a 'Reminder' section with 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.

The screenshot shows the 'Audit Trail' tab in a software interface. It displays a table with columns for 'No.', 'Date', 'Event', and 'By'. The table contains five entries, each with a blue hyperlink for the identification number. Below the table is a '1 - 5 of 5 Results' indicator and three buttons: 'Delete', 'Cancel', and 'Save'.

| No.                | Date           | Event   | By       |
|--------------------|----------------|---|----------|
| <a href="#">89</a> | 01/05/16 14:57 | Relationship created. Service Desk #Service Desk i... | Sankar R |
| <a href="#">82</a> | 01/05/16 12:33 | Warranty Date changed from '16 Jan 2016' to '5 Feb... | Sankar R |
| <a href="#">81</a> | 01/05/16 12:33 | Warranty Date set to '16 Jan 2016'                    |          |
| <a href="#">72</a> | 01/05/16 11:42 | Added 'James Stewart' as an owner of this item        | Kamal K  |
| <a href="#">51</a> | 12/10/15 04:59 | Item Number changed from '100002' to 'Service Desk... | Sankar R |

### **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 screenshot shows a software interface for 'Item Information' with the 'Costs' tab selected. The item is identified as 'Item # 100005 (Server)'. The interface is divided into several sections: 'Financial' with fields for Cost (\$0.00), Monthly Cost (\$0.00), Purchase Date (08/01/10 19:03), Depreciate Over (years), Depreciated Value (\$0.00), Audit Date (mm/dd/yy), and PO Number; 'Inherited Costs' with fields for Inherited Capital, Inherited Ongoing, and Delegate Costs (radio buttons for Yes and No, with No selected); 'SLA Details' with Service Level set to 'Warranty'; 'Warranty' with an Expires field; and 'Availability' with Avg Repair Time and Avg Time To Fail both set to 'N/A'. At the top, there are tabs for Information, Details, Costs, Requests, and Relationships, and buttons for Edit, Duplicate, and Print. A 'Done' button is located at the bottom right.

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. |

| <b>Financial</b>  | <b>Description</b>  |
|-------------------|---|
| 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.  |
| 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.

The screenshot displays the 'Item Information' interface with the 'Costs' tab selected. The 'Contract' section shows details for a 'Warranty' contract with the following information:

- 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

The 'Warranty' section shows an expiration date of 02/03/16. The 'Availability' section shows 'Avg Repair Time' and 'Avg Time To Fail' as 'N/A'.

Below the details is a table of contracts:

| Contract # | Type     | SLA      | Invoice # | Start Date     | End Date       |
|------------|----------|----------|-----------|----------------|----------------|
| 9          | Per Item | Warranty | 100019    | 01/07/16 12:09 | 02/09/17 23:59 |

The table indicates '1 - 1 of 1 Results'. A 'Done' button is visible at the bottom right of the interface.

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:

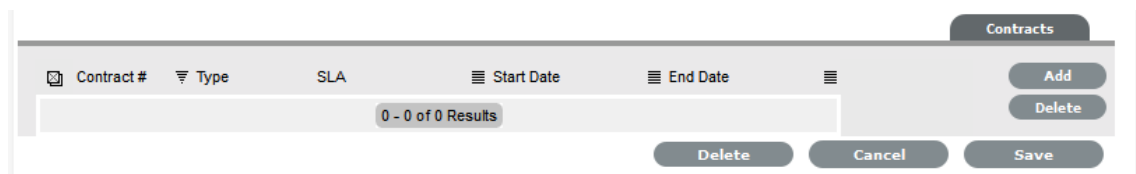
1. Select the Item Number

2. Move to the Costs tab

The Contracts tab is visible in the bottom right corner of the screen

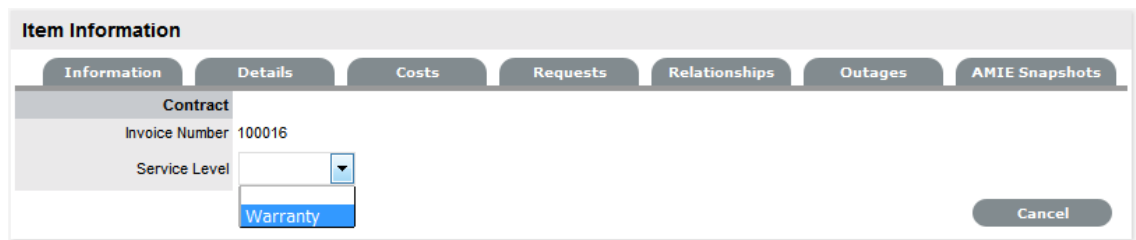
3. Click Edit

The Add and Delete buttons are made available within the Contracts tab



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.

**Item Information**

Information Details Costs Requests Relationships Outages AMIE Snapshots

**Contract**

Invoice Number 100016

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 Item

Time 

- Subscription
- Time Limited Subscription
- Support Hours
- Support Hours By Month

Start Date

End Date

Notes

Price \$0.00

Tax \$0.00

Taxable

Total Cost \$0.00

Cancel Save

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                     |
|                    |          |                |                   |              |                             | 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:

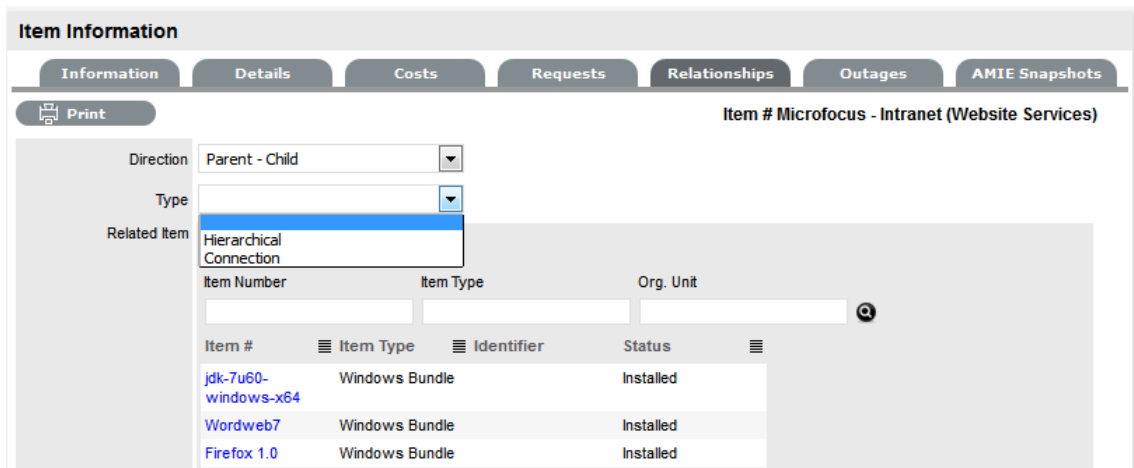
- ◆ Hierarchical Relationship
- ◆ Connection - an association between the selected Items.

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



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. |

---

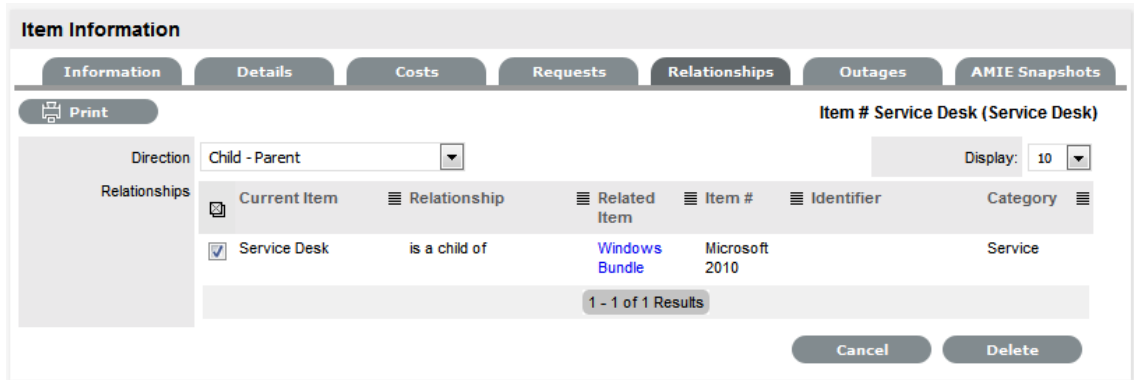
The Lifecycle State name can be accessed by scrolling over the Item icon within the Map.

### 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 231](#)

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.

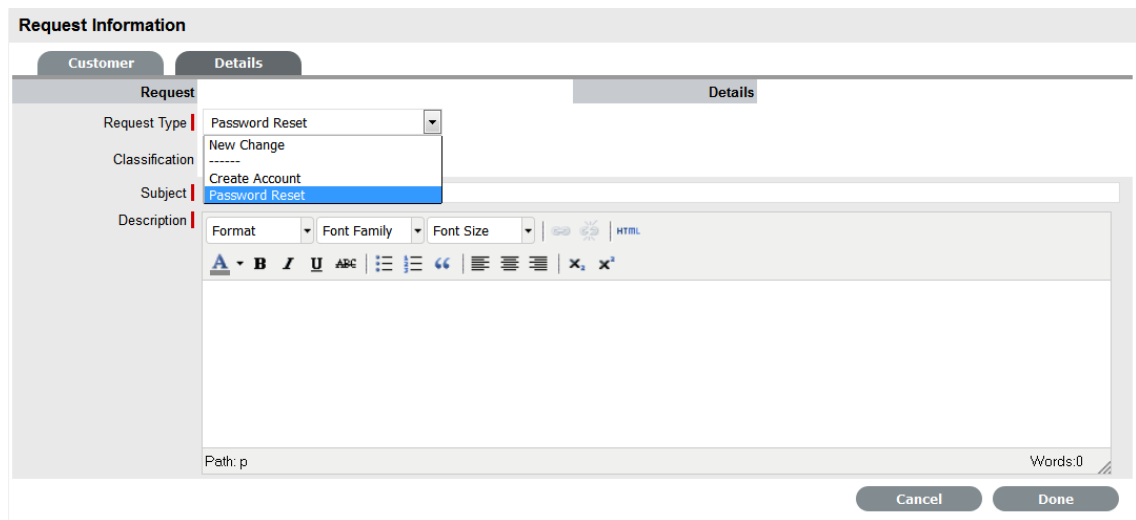
---

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 in the 'Details' tab. 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 'Password Reset' (which is highlighted in blue). Below the dropdown, the 'Subject' field is populated with 'Password Reset'. The 'Description' field is empty and features a rich text editor toolbar with options for bold, italic, underline, text color, background color, bulleted list, numbered list, quote, indent, and link. At the bottom of the form, the 'Path' field contains the letter 'p' and the word count is shown as 'Words: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 233](#)
- ◆ [“Request Subject” on page 234](#)

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.)

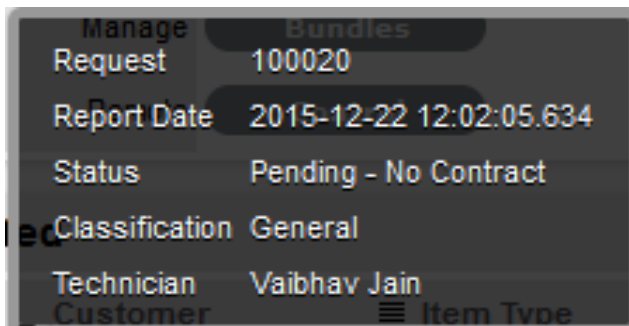
5. Enter all relevant information within the Description field  
This is a mandatory field.

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 235](#)
- ◆ [“Proactive Solution Analysis” on page 236](#)
- ◆ [“Analysis” on page 236](#)

- ◆ “Searching for a Solution” on page 238
- ◆ “Proactive Analysis during Request Creation” on page 239
- ◆ “Converting a Service Request to an Incident” on page 240
- ◆ “Linking Service Requests” on page 241
- ◆ “Creating an Incident, Problem or Change Request within a Service Request” on page 241
- ◆ “Creating an Alert” on page 241
- ◆ “Article Button” on page 242
- ◆ “Remove Button” on page 243
- ◆ “Solution Article” on page 243
- ◆ “Creating a Solution Article” on page 244
- ◆ “Requests Tab” on page 246
- ◆ “Closing Requests within Groups” on page 246
- ◆ “Status” on page 247
- ◆ “Updating a Service Request's Workflow and Status” on page 248
- ◆ “Requests with a Pending-No Contract Status” on page 248
- ◆ “Viewing a Status Note” on page 248
- ◆ “Service Request Reminders” on page 249
- ◆ “SLA Triggers and Request Status” on page 249
- ◆ “Priority” on page 250
- ◆ “Setting Request Priority” on page 250
- ◆ “Request Assignment and Escalation” on page 251
- ◆ “Request Assignment” on page 251
- ◆ “Automated Escalation” on page 252
- ◆ “Manual Escalation” on page 252
- ◆ “Escalation Control” on page 252
- ◆ “Notification” on page 252
- ◆ “Workflow” on page 254
- ◆ “Moving through the Workflow” on page 254
- ◆ “Approval State” on page 255
- ◆ “Assigning a State with an Underpinning Contract” on page 255
- ◆ “OLA Status Due” on page 256
- ◆ “Team Assignment during the Workflow Lifecycle” on page 256
- ◆ “Pending - No Contract Status” on page 257

### ***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.

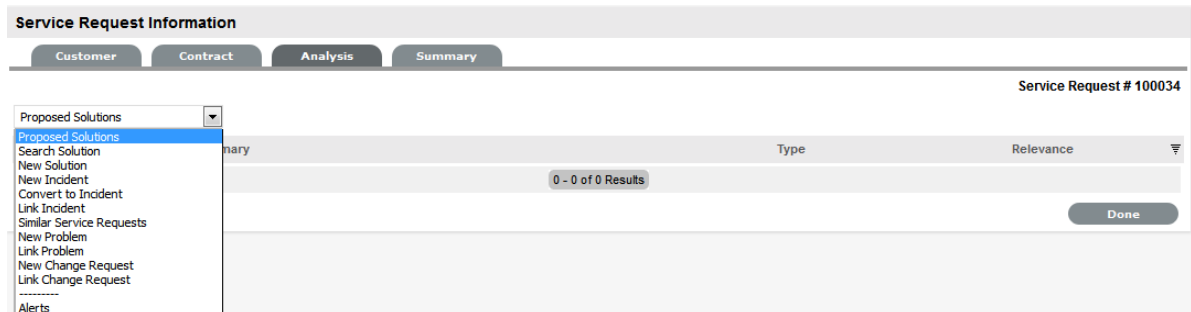
(This option is not available to Incidents created with Multiple Items assigned during the Incident creation process.)

- ◆ 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.

---




---

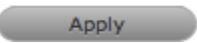
**NOTE:** If analysis is not required during the request creation process, click Done to continue to the Summary tab.

---

### ***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: <a href="#">Solution Article</a> .   |
| 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.   |

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## Analysis Tab Drop-down Options

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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:

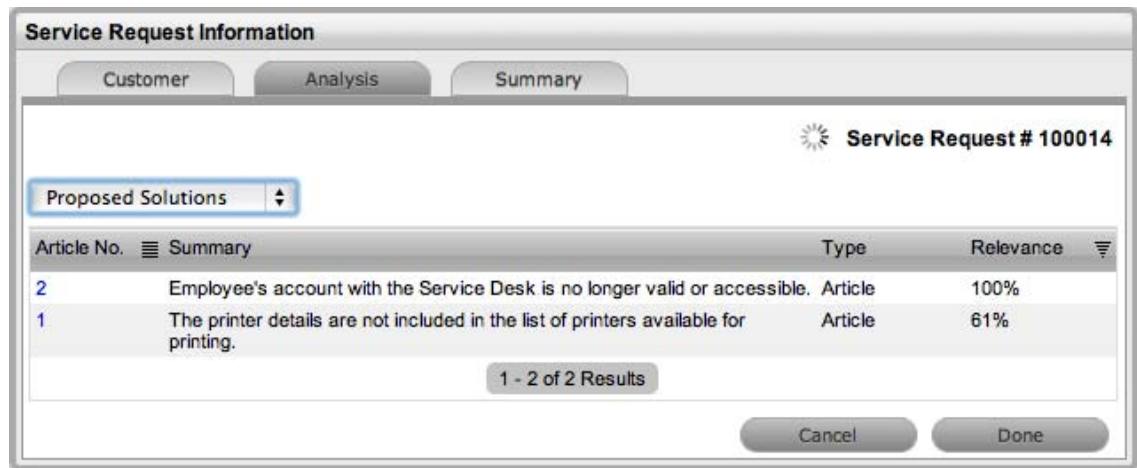
1. Click on the number of the required Request

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: <a href="#">Solution Article</a> .   |
| Alerts            | Shows details of the Alerts that have been created within the Incident.   |

---

5. Click Save.

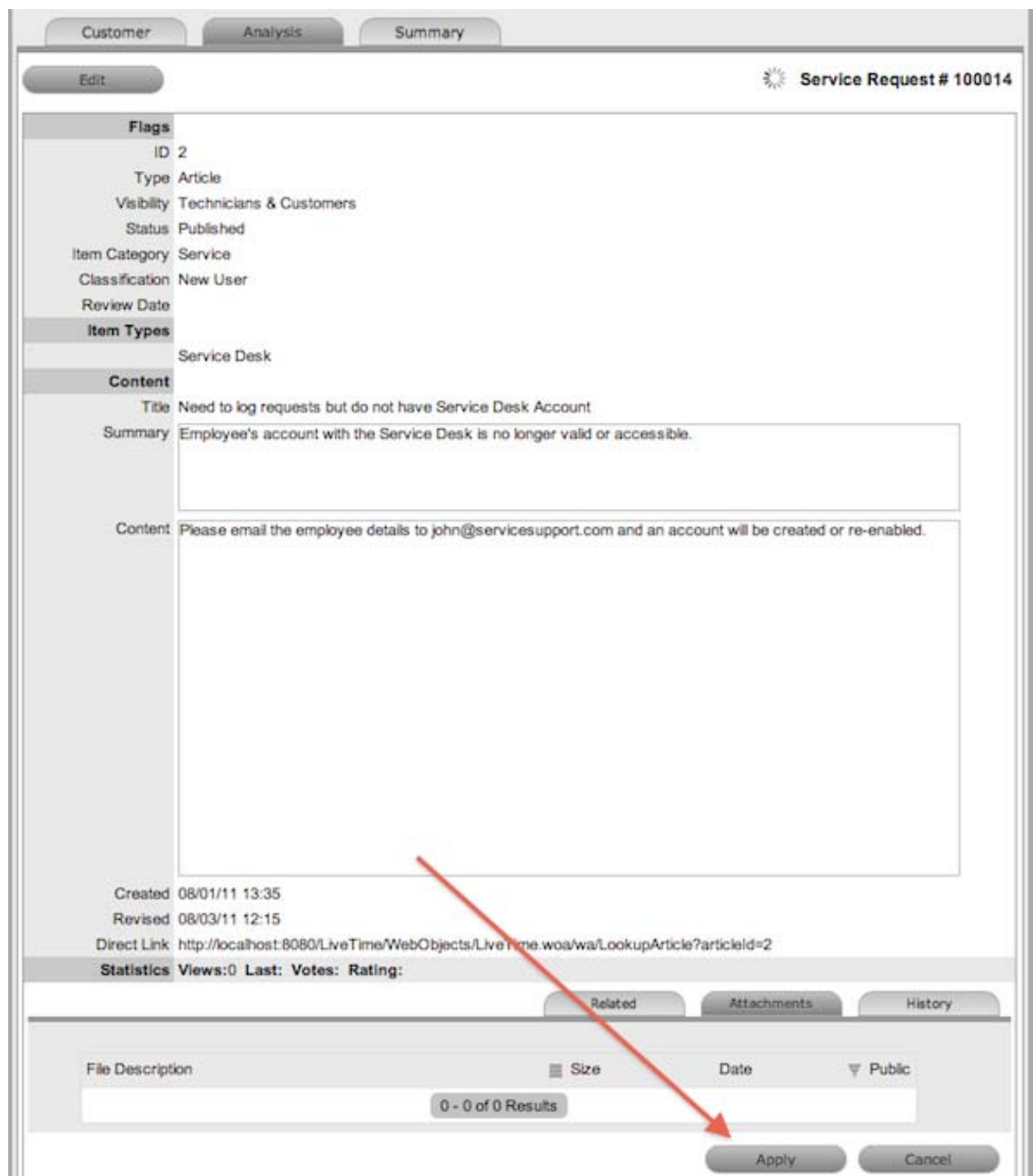
### ***Proactive Analysis during Request Creation***

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.



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***

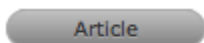
Within the Analysis tab, an Alert that is associated with the Request can be created by:

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:

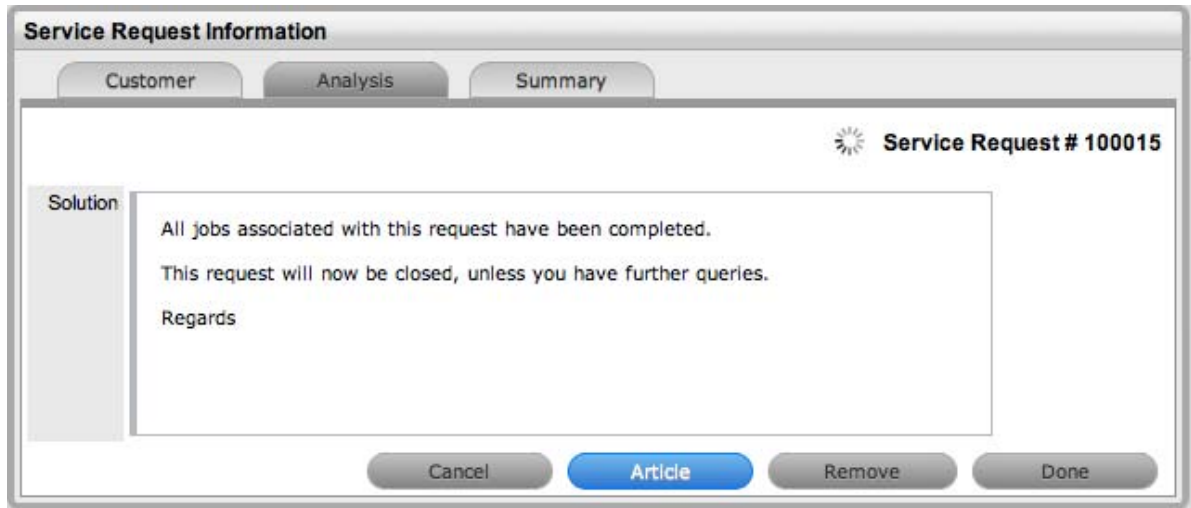
| Alert Details | Description  |
|---------------|--|
| Created       | The current date and time.   |
| Publish       | <p>The date the Alert is published. Use the calendar icon to the right of the field, to select a Publish date.</p> <p>Set to a date in the future, or use the default to publish the Alert immediately.</p>  |
| 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      | <p>The type of Alert to be published. The choices are:</p> <ul style="list-style-type: none"> <li>◆ Information – for general Alerts</li> <li>◆ Warning – to warn Users of potential issues</li> <li>◆ Urgent – to publish an urgent actionable message.</li> </ul> <p>The icon appearing with the message will depend on the type of Alert.</p>   |
| User          | <p>The type of Users to receive the Alert, which include:</p> <ul style="list-style-type: none"> <li>◆ Specific Customer or User</li> <li>◆ User Role</li> <li>◆ Personal Alert</li> <li>◆ Organizational Units</li> <li>◆ Public.</li> </ul> <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.

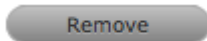
**Article Button**



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

---

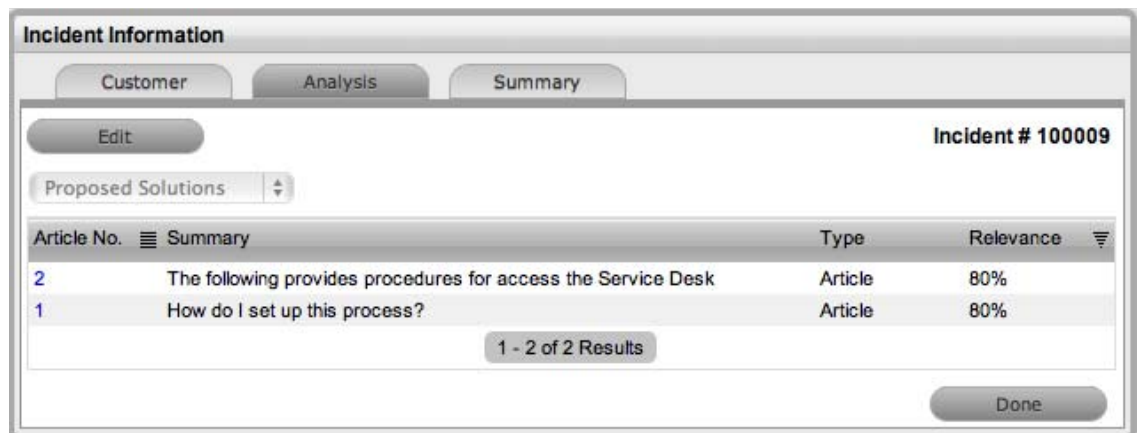
|                   |   |
|-------------------|---|
| Proposed Solution | Displays a list of all Solutions with a search based on the Problem Description, Item Type and Classification. To assign a Solution, select the Solution ID number to display the Solution in full. Click Resolve if the Solution is 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

The screenshot shows the 'Incident Information' form for incident # 100012. The form is divided into several sections:

- Flags:** ID 20, Type Article, Visibility: Everyone (dropdown), Status: In Development (dropdown), Item Category: BYOD Devices, Classification: General. A message below reads: "Please select at least one Item Type or Item."
- Item Types:** Iphone 6
- Items:** 0
- Details:** Custom 1, Custom 2, Custom 3 (all dropdown menus)
- Content:** Title: KB Article
- Summary:** Rich text editor with "KB Article" entered. Path: p, Words: 2
- Content:** Rich text editor with "KB Article" entered. Path: p, Words: 2
- Footer:** Created 01/05/16 16:05, Revised 01/05/16 16:05

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.)

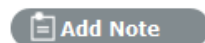
Alternatively, all Requests can be closed by using the Solution button within the Notes tab of a Request. This option is available if the Handshaking facility has not been enabled for the system, within the Administrator>Setup>Privileges>Requests tab.

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

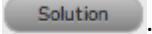
The Visibility option must be set to Public to access the Solution or Propose button.

5. Check the Apply to Group option

If relevant, add Note Time across the Group.

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 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.  |


| Status             | Description   |
|--------------------|---|
| Cancelled- Unpaid* | The contract for a Request has not been paid. The Request is cancelled. |

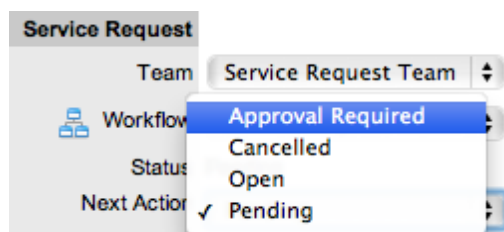
\*Denote System States that cannot be deleted but can be renamed.

### **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:

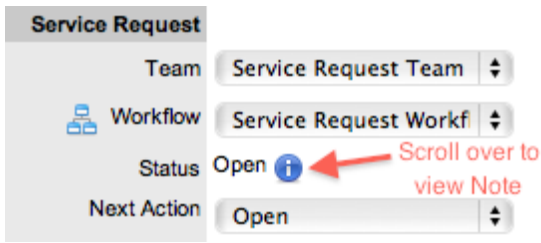
- ◆ Using the Handshaking feature when a Note is added
- ◆ Closing an Incident when adding a Note using the Solution button
- ◆ Escalating a Request to an Incident, Problem or Change Request
- ◆ When Billing is enabled and payment is not received.

### **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.

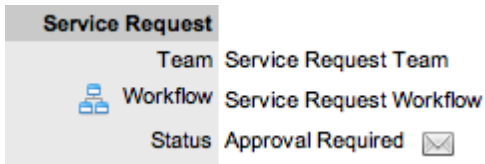
### **Viewing a Status Note**

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.)



### 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.

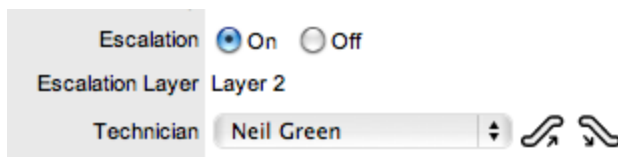
Note, if the Self Assign option is enabled for the Team, the system assignment logic is ignored and the User creating the request is automatically assigned the Request.

### ***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 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.

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.

| <b>Incident Information</b> |   |
|-----------------------------|---|
| <b>Incident #:</b>          | 100053  |
| <b>Date Opened:</b>         | 08/18/06 15:24 (mm/dd/yy hh:mm)                   |
| <b>Classification:</b>      | Printing  |
| <b>Technician:</b>          | Supervisor User                                   |
| <b>Item #:</b>              | 100005  |
| <b>Item Type:</b>           | word  |
| <b>Identifier:</b>          |   |
| <b>Customer:</b>            | Bob Samson  |
| <b>Company:</b>             | Sales   |
| <b>Due Date:</b>            | 08/21/06 15:24                                    |
| <b>Description:</b>         | 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***

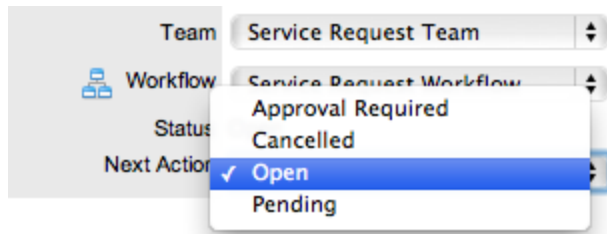
To move a Service Request through the stages of the Workflow, in the Summary tab of the Service Request Information screen:

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.

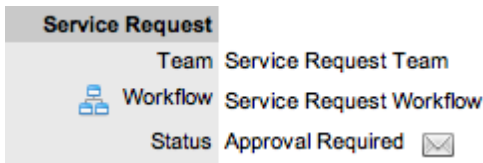




3. Select a State
4. Click Save.

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.



### ***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 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)

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.

**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

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)

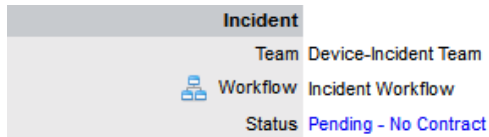
**Team Assignment during the Workflow Lifecycle**


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.



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 257](#)
- ♦ [“Changing the Customer of a Request or Item” on page 261](#)
- ♦ [“Converting a Service Request to an Incident” on page 262](#)
- ♦ [“Item Relationship Map and Assignment” on page 263](#)
- ♦ [“Updating the Item associated with the Request” on page 263](#)

### ***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.




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**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.

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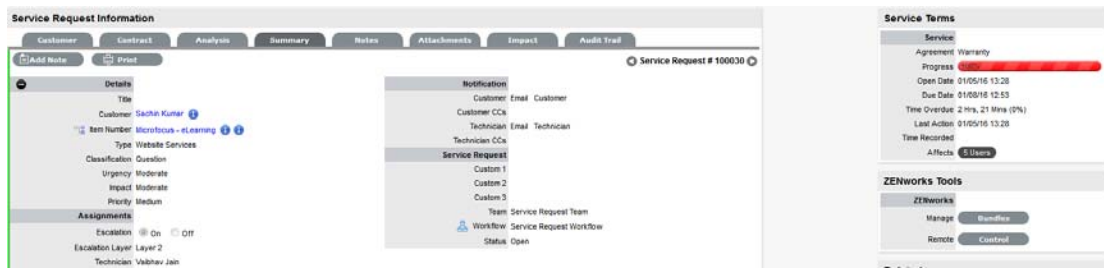
The Service Request Information Summary tab screen includes the following:

| Summary Tab    | Description  |
|----------------|--|
| <i>Details</i> | <p>The following details are displayed:</p> <ul style="list-style-type: none"> <li>◆ <b>Customer:</b> The customer assigned to the request. Click on the customer name link to view customer information. Scroll over the information icon  next to the <b>Customer</b> for quick information such as <b>Username, Org.Unit, Phone</b> and <b>Local Time</b>.</li> <li>◆ <b>Item:</b> An item assigned to the request. Select the <b>Item Number</b> link for more information about the Item. Scroll over the information icon  next to the <b>Item Number</b> to view Item information recorded on the <b>Details</b> tab.</li> </ul> <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"> <li>◆ <b>Type:</b> Service request type such as Internet Explorer</li> <li>◆ <b>Classification:</b> Request Classification that was selected when the Request was created. This can be updated, if required.</li> <li>◆ <b>Urgency:</b> Indicates if the service request is to be taken up on priority.</li> <li>◆ <b>Impact:</b> 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.</li> <li>◆ <b>Priority:</b> Shows the priority of the Request, which determines the Service Level triggers applied to the Request.</li> </ul> <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"> <li>◆ <b>Escalation:</b> This is visible if the <b>Escalation Control</b> option is enabled in the application <b>Setup</b>. This is only available to the Supervisors, and allows them to disable the escalation timers.</li> <li>◆ <b>Escalation Layer:</b> 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.</li> <li>◆ <b>Technician:</b> 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.</li> <li>◆ <b>Subject:</b> 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.</li> <li>◆ <b>Description:</b> 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.</li> </ul> |
| <i>Notification</i> | <p>The following details are displayed:</p> <ul style="list-style-type: none"> <li>◆ <b>Customer:</b> 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.</li> <li>◆ <b>Customer CCs:</b> <i>Customer CCs</i> is a free text field for any additional notification recipients, these can be divided into Customer and Technician CC lists.</li> <li>◆ <b>Technician:</b> 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.</li> <li>◆ <b>Technician CCs:</b> <i>Technician CCs</i> is a free text field for any additional notification recipients. These can be divided into Customer and Technician CC lists.</li> </ul>   |


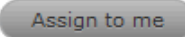
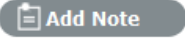





| Summary Tab            | Description  |
|------------------------|--|
| <i>Service Request</i> | <p>The following details are displayed:</p> <ul style="list-style-type: none"> <li>◆ <b>Team:</b> Displays the default support Team assigned to the Incident. This can be changed by selecting another option within the drop-down list. The Team list is derived from the Workflow and Workflow State</li> <li>◆ <b>Alternate Team:</b> This information is visible if the <b>Notify Alternate Team</b> option is enabled in the <b>Admin&gt;Email &gt;Setup</b> 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.</li> <li>◆ <b>Workflow:</b> 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.<br/><br/>Select  to view the Workflow in its entirety.</li> <li>◆ <b>Status:</b> Shows the current Workflow State of the Request.</li> <li>◆ <b>Next Action:</b> 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.<br/><br/>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 <b>Escalation Layer</b> and <b>Technician</b> fields to view if an assignment change is made as part of the Status update.</li> <li>◆ <b>Status Due:</b> Displays details of the expiry time for the current Workflow State if the State has an OLA assigned.</li> </ul> |
| <i>Service Terms</i>   | <p>The following details are displayed:</p> <ul style="list-style-type: none"> <li>◆ <b>Agreement:</b> This is the Service Level Agreement assigned to the Request. The service level is derived from either the Customer, Organizational Unit or Item.</li> <li>◆ <b>Service Manager:</b> Displays the name of the Service Level Manager responsible for overseeing Requests related to the assigned service agreement.</li> <li>◆ <b>Progress:</b> 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"> <li>◆  - Workflow is in an SLA paused state. Triggers will not fire.</li> <li>◆  - Workflow is in an SLA timers on state. Triggers will fire.</li> <li>◆  - Workflow is in an Exit state and the SLA has been successfully maintained.</li> <li>◆  - Assigned SLA has been breached and Workflow is in an Exit state.</li> </ul> </li> <li>◆ <b>Dates:</b> Summarizes the important date details for the Request. The Due Date is automatically calculated based on the Service Level assigned to the Request.</li> <li>◆ <b>Time Recorded:</b> Displays the amount of time the Service Request has been open and worked on.</li> <li>◆ <b>Affects:</b> Displays the number of Users assigned to the Item.</li> </ul>  |





**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:

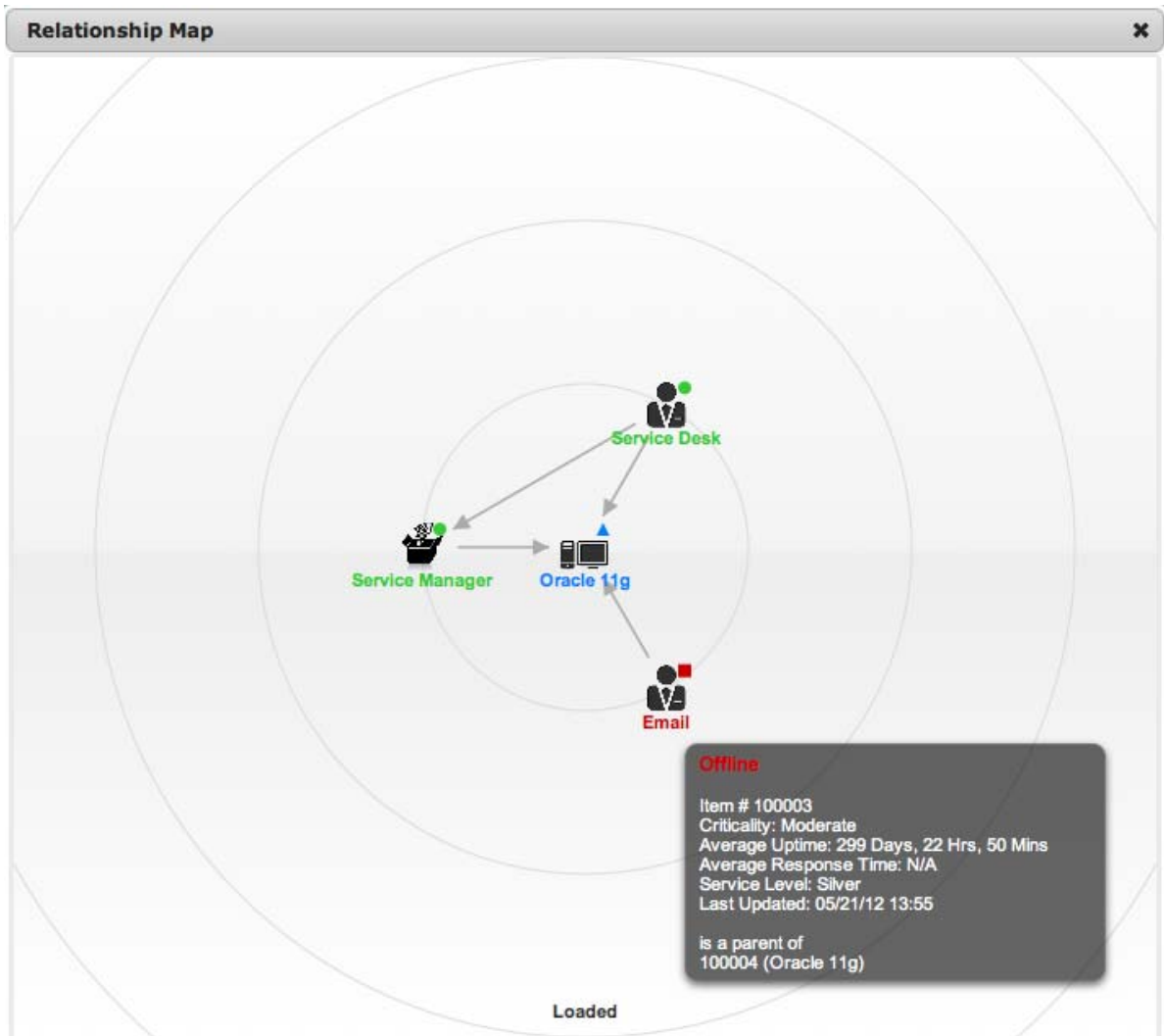
1. Select Edit within the Analysis tab

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.

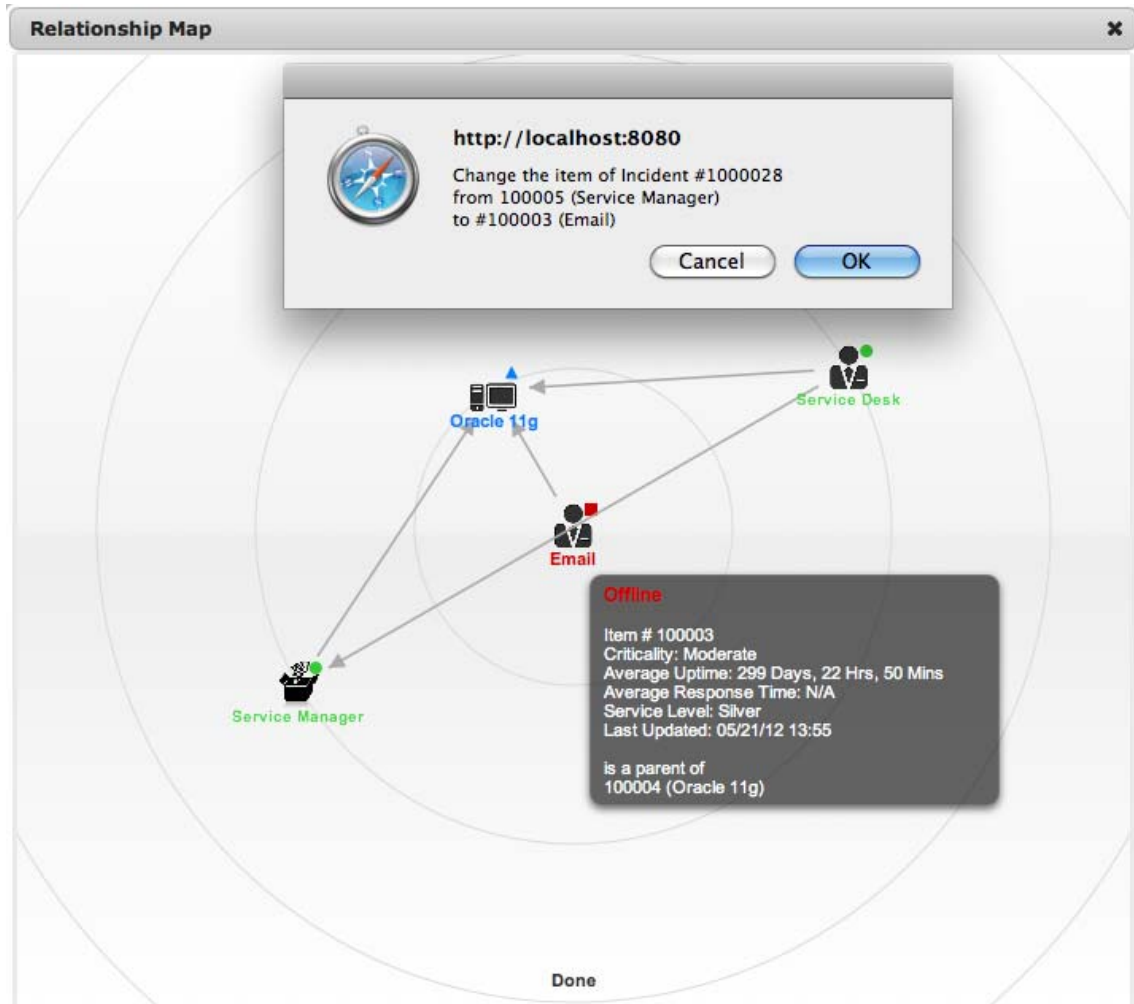


### **Updating the Item associated with the Request**

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 265](#)
- ♦ [“Add Note Button” on page 265](#)
- ♦ [“Viewing All Notes” on page 265](#)
- ♦ [“Adding a Note” on page 265](#)
- ♦ [“Create Knowledge” on page 267](#)

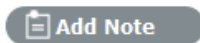
- ◆ “Solution” on page 267
- ◆ “Propose Handshake” on page 267
- ◆ “Draft Note” on page 268
- ◆ “Changing the Status of a Note” on page 268
- ◆ “Viewing a Note” on page 268
- ◆ “Replying to a Note” on page 269
- ◆ “Emailing Saved Request Notes” on page 269
- ◆ “Adding Notes to Groups” on page 269

## **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:

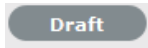
1. Within the Notes Editor, enter the possible solution
2. At the bottom of the Notes field, click the Propose button. The proposed solution and handshake notification will be sent to the Customer. The Request will automatically change status to On Hold - Pending Approval.

---


**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



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

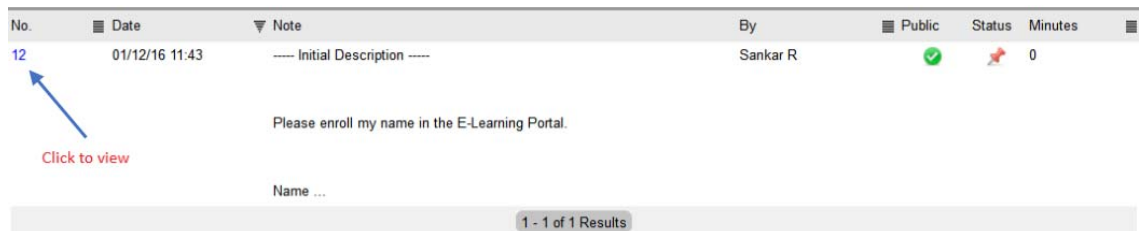
- ◆ When the Note is created, it can be either public or private. After the Note is saved, it is possible to switch visibility
- ◆ If a Note is marked Private, a padlock graphic is visible. To change the status to Public, click  to display 
- ◆ To change the Public Note to Private, click  to display .



### 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.



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 270](#)
- ◆ [“Adding an Attachment” on page 270](#)
- ◆ [“Deleting an Attachment” on page 271](#)

### **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

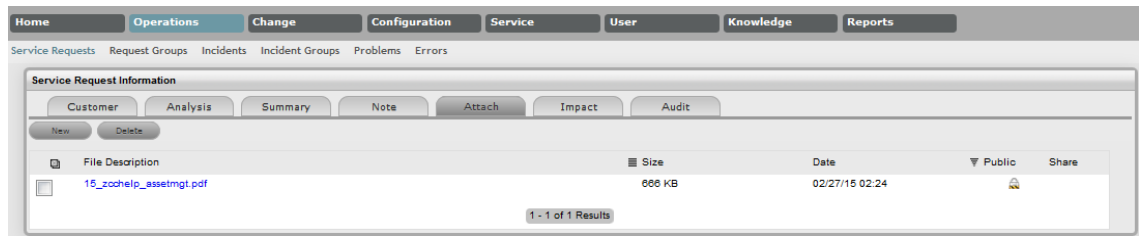
New


Browse... No file selected. Private  Description

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 271](#)
- ◆ [“Service Targets” on page 272](#)
- ◆ [“Service Level Breaches” on page 272](#)
- ◆ [“Services Affected” on page 273](#)
- ◆ [“Estimates” on page 273](#)
- ◆ [“Contract Monitor” on page 274](#)

### 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. |

| Options          | Description  |
|------------------|--|
| Estimates        | Provides a summary of the time estimated for each state of the Workflow based on the OLA assigned to the Request.  |
| 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.

| Problem Information      |          |               |                  |                 |                 |        |             |
|--------------------------|----------|---------------|------------------|-----------------|-----------------|--------|-------------|
| Customer                 | Contract | Analysis      | Summary          | Notes           | Attachments [2] | Impact | Audit Trail |
| 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    |             |

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.

| Description                         | Notes  | Attachments | Impact | Audit Trail |
|-------------------------------------|--|-------------|--------|-------------|
| Display: Service Level Breaches     |  |             |        |             |
| <input type="button" value="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 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***

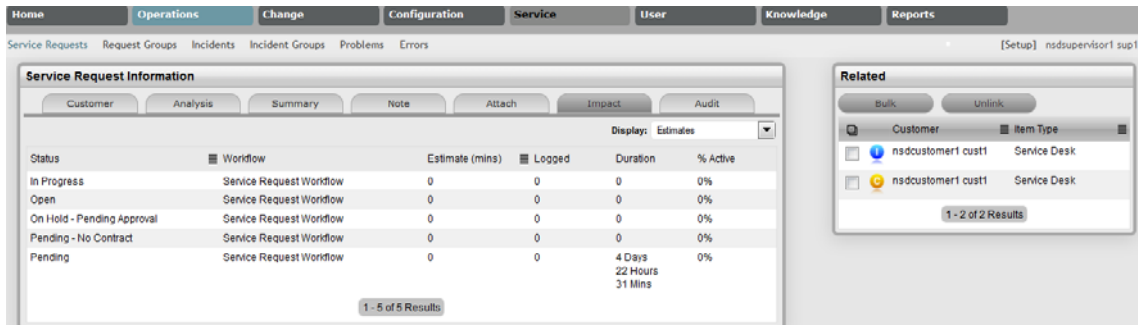
The Estimates option allows Users to view an indication of the approximate time a Request should remain in each State of the Service Request Workflow, the amount of time logged in each State and the length of time the Request resided in each State.

| <b>Options</b> | <b>Description</b>  |
|----------------|---|
| 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:

| <b>Details</b>            | <b>Description</b>  |
|---------------------------|---|
| 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:  ← Check when the Service Provider meets the Restoration or ResolutionTime

Expected Resolution Time: 05/15/11 21:21

Resolved:  ←

Comments:

**NOTE:** If Milestones are breached the Response, Restoration and Resolution times are assigned a red marking.

## Audit Tab

- ◆ [“Audit” on page 275](#)
- ◆ [“Audit Trail” on page 276](#)
- ◆ [“Resource Utilization” on page 276](#)
- ◆ [“Item Audit Trail” on page 276](#)
- ◆ [“Request Approvals” on page 276](#)

## 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

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 - 6 of 5 Results

Display: Audit Trail

- Audit Trail
- Resource Utilization
- Item Audit Trail
- Request Approvals

### ***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' interface for 'Item # Microfocus - Intranet (Website Services)'. It features several tabs: Information, Details, Costs, Requests, Relationships, Outages, and AMIE Snapshots. A 'Print' button is visible. The 'Direction' dropdown is set to 'Parent - Child'. The 'Type' dropdown is open, showing 'Hierarchical' and 'Connection' options. Below this is a 'Related Item' search field with a magnifying glass icon. A table lists related items:

| Item #                               | Item Type      | Identifier | Status    |
|--------------------------------------|----------------|------------|-----------|
| <a href="#">jdk-7u60-windows-x64</a> | Windows Bundle |            | Installed |
| <a href="#">Wordweb7</a>             | Windows Bundle |            | Installed |
| <a href="#">Firefox 1.0</a>          | 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

The screenshot shows the 'Item Information' interface with the 'Relationships' tab selected. The 'Direction' dropdown is set to 'Parent - Child'. A table lists three relationships for the current item 'Dell Latitude E6430', each with a checkbox for deletion. The relationships are: 'is a parent of' to 'Windows Bundle' (Notepad++), 'is a parent of' to 'Windows Bundle' (Firefox 1.0), and 'is a parent of' to 'Windows Bundle' (Microsoft 2010). The interface includes a 'Print' button, a 'Display: 10' dropdown, and 'Cancel' and 'Delete' buttons at the bottom.

| 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 |


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**





|                |   |
|----------------|---|
| <b>Service</b> |   |
| Agreement      | Warranty  |
| Progress       | <div style="display: inline-block; border: 1px solid #ccc; padding: 2px;"> <span style="font-size: 0.8em;">Paused</span>  </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;"> <span style="font-size: 0.8em;">1 Users</span> </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> <ul style="list-style-type: none"> <li style="margin-bottom: 5px;"> - Workflow is in an SLA paused State. Triggers will not fire.</li> <li style="margin-bottom: 5px;"> - Workflow is in an SLA timers on State. Triggers will fire.</li> <li style="margin-bottom: 5px;"> - Workflow is in an Exit State and the SLA has been successfully maintained.</li> <li style="margin-bottom: 5px;"> - Assigned SLA has been breached and Workflow is in an Exit State.</li> </ul> |
| 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>   |

---

---

## Service Terms

---

|                  |  |
|------------------|--|
| Close Date       | Auto-filled when the status of a 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 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 282](#)
- ◆ [“Bulk Options” on page 282](#)
- ◆ [“Remove Related Requests” on page 283](#)

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                  |   |                  |
|--------------------------|---|------------------|
| <input type="checkbox"/> | 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                  |   |                  |
|--------------------------|---|------------------|
| <input type="checkbox"/> | Customer  | Item Type        |
| <input type="checkbox"/> |  Sachin Kumar              | Website Services |
| <input type="checkbox"/> |  Technician S Vaibhav Jain | Website Services |
| <input type="checkbox"/> |  James Stewart             | Service Desk     |

1 - 3 of 3 Results

Request 100034

Report Date 2016-01-08 14:45:37.342

Customer Sachin Kumar

Status Pending

Classification Question

Technician S Vaibhav Jain

Item Type Website Services

### **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 284](#)
- ◆ [“Creating a New Group via the Service Request Tab” on page 284](#)
- ◆ [“Adding Requests to an Existing Group” on page 284](#)
- ◆ [“Merging Request Groups” on page 285](#)
- ◆ [“Grouping Service Requests” on page 285](#)
- ◆ [“Multi-Item Requests” on page 285](#)
- ◆ [“Multi-Item Request Item Assignment” on page 286](#)

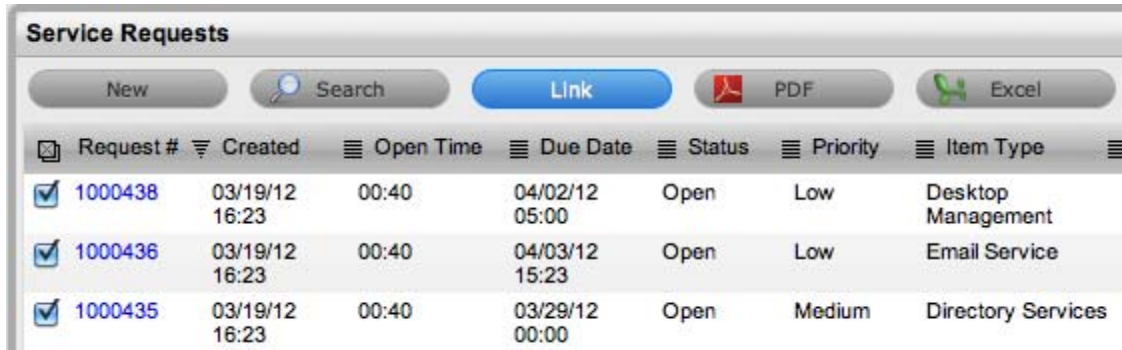
## Grouping Service Requests

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' (highlighted in blue), '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<br>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.

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.

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 289](#)
- ◆ [“Create & Process a Request with Contracts enabled” on page 289](#)
- ◆ [“Request with Per Item Contract” on page 290](#)
- ◆ [“Request with Per Request Contract” on page 290](#)
- ◆ [“Grouped Requests and Contracts” on page 291](#)
- ◆ [“Processing an Invoice” on page 291](#)
- ◆ [“Invoice Cancellation” on page 292](#)
- ◆ [“Time Recorded” on page 292](#)
- ◆ [“Recording Time against Contracts” on page 292](#)

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.

The screenshot shows a 'Billing' configuration window with two tabs: 'Setup' and 'Contracts'. 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.

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.

---

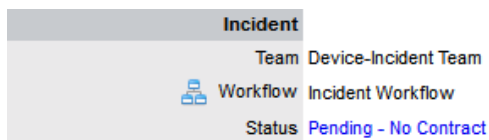
**NOTE:** When a Pending Contract is selected, the Contract must be processed before work can be undertaken on the request.


---

### **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". It has several tabs: Customer, Contract, Analysis, Summary, Notes, Attachments, Impact, and Audit Trail. The "Contract" tab is selected. Below the tabs, there are two drop-down 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 'Contract' tab of the 'Incident Information' window. The 'Contract Type' is set to 'Per Request' and the 'Service Level' is 'Bronze'. The 'Group' checkbox 'Apply to uncontracted' is checked. The 'Charge base' dropdown menu is open, with 'Per Group' selected. The 'SLA Price' dropdown shows 'Per Request'. The 'Taxable' checkbox is unchecked. Below these fields is a table of SLA 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

Note Time + - 15 (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.

Time Recorded 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.



The screenshot shows a web interface for 'Request Groups'. At the top, there are buttons for 'New', 'Search', 'Merge', 'PDF', and 'Excel'. A filter is set to 'All Request Groups [sys]' and the display count is '10'. Below the buttons is a table with the following columns: Group #, Title, Item Type, Classification, Priority, Start Date, Close Date, Requests, Customers, and Description. One row is visible with the following data: Group # 100007, Title Group 100007, Classification Medium, Start Date 05/12/11 20:42, Requests 2, Customers Amber Wallan, Dawn Knight, and Description Group 100007. At the bottom of the table, it says '1 - 1 of 1 Results'.

| 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<br>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

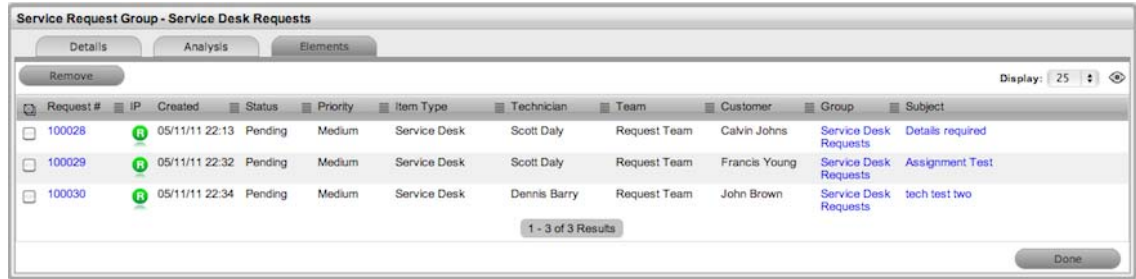
3. Enter a Name for the Group
4. Assign an Item Type, if applicable
5. Assign a Classification, if an Item Type is selected
6. Assign a Group Priority
  - The Status is set by default to Open.
7. Enter a Group Description
8. Click Save

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.

| 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.



## 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  [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. 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** G1

**Details** | **Requests** | **Analysis** | **Elements**

**Customer**

Name Sachin Kumar  
 Email [sachin@nsd.com](mailto: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.<br><b>NOTE:</b> 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

| 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

| 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 Calkier | Service Request Team | Lena Benson | New Employee | Ensure Desktop and Telephone availability for new staff member |

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.



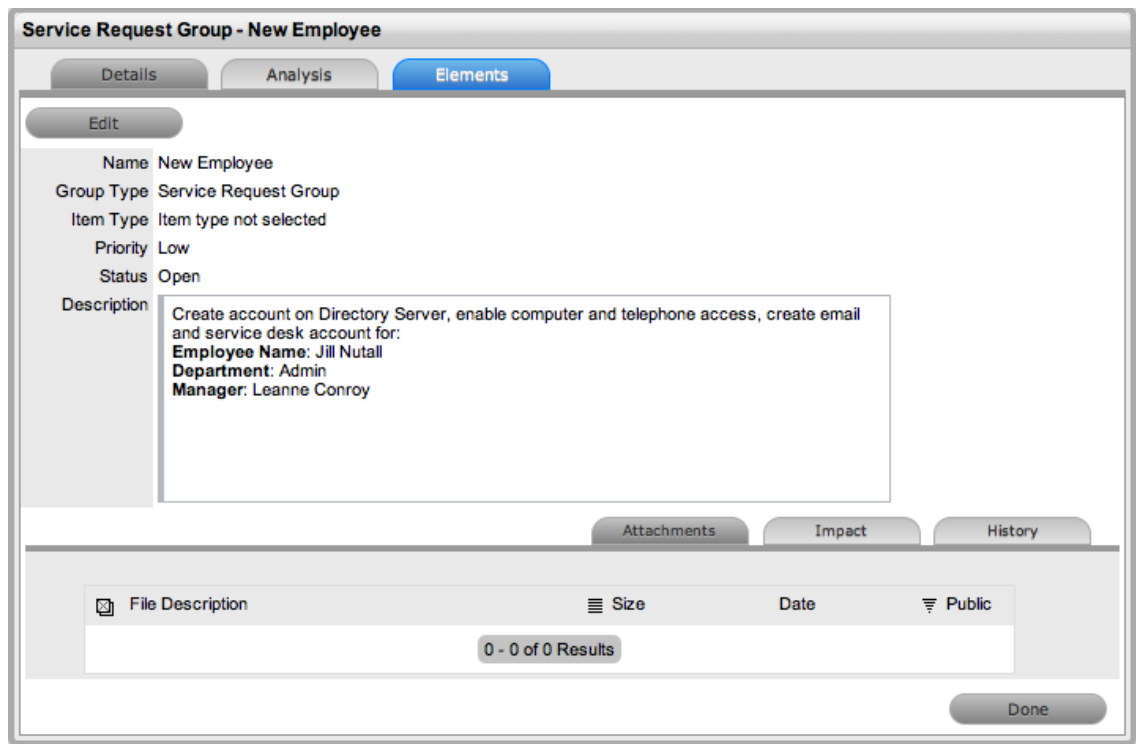
4. Set the Name, Item Type, Classification, Priority and Description that best defines all associated Service Requests
5. Click Save.  
The History tab records details of the Groups merged to form the new Group. Click the No. hyperlink to view the details. The Impact tab records the Type and Number of requests associated with the Group.

## Closing a Request Group

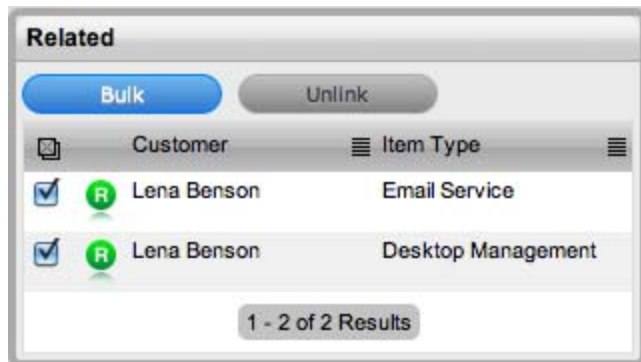
A Request Group is automatically closed when all Requests included in the Group are closed.

To close a Group:

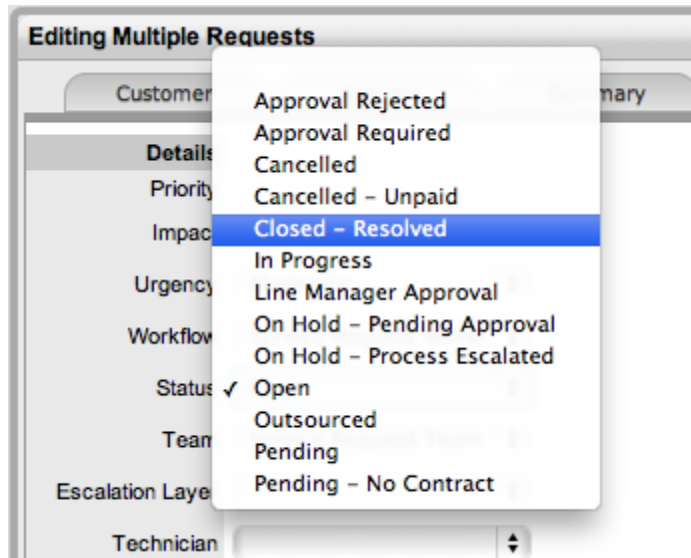
1. Go to Operations>Request Groups
2. Select the Service Request Group # link
3. Move to the Elements tab



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 303](#)
- ♦ [“Incidents” on page 305](#)
- ♦ [“Incident Groups” on page 367](#)

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:

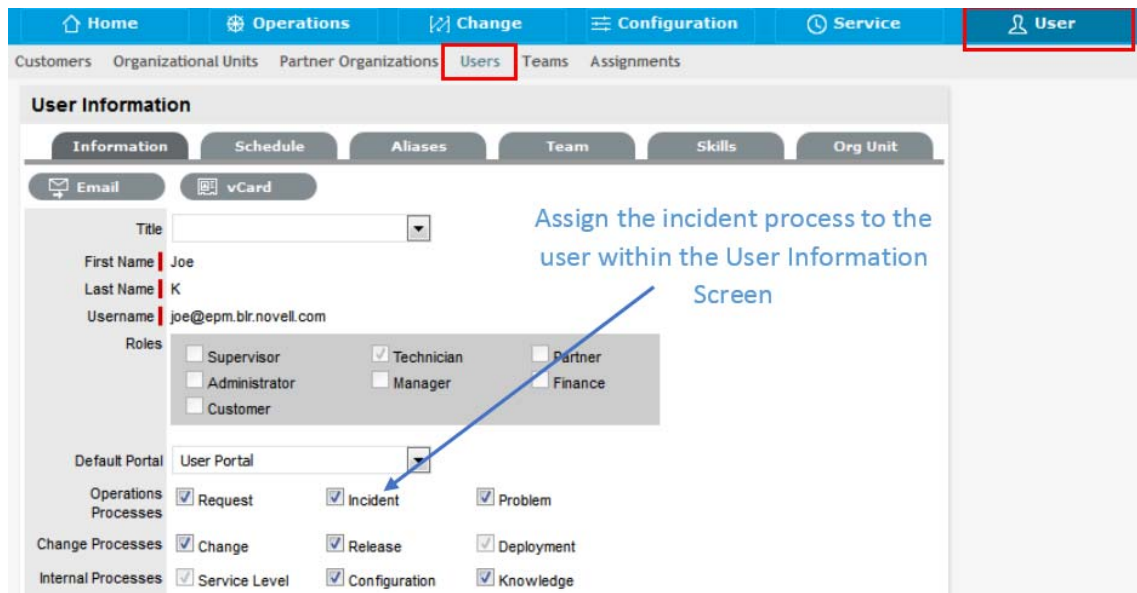
- ♦ Incident detection and recording
- ♦ Classification of all Incidents and initial support
- ♦ Investigation and diagnosis
- ♦ Escalation
- ♦ Resolution and recovery
- ♦ Incident closure
- ♦ Incident ownership, monitoring, tracking and communication

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

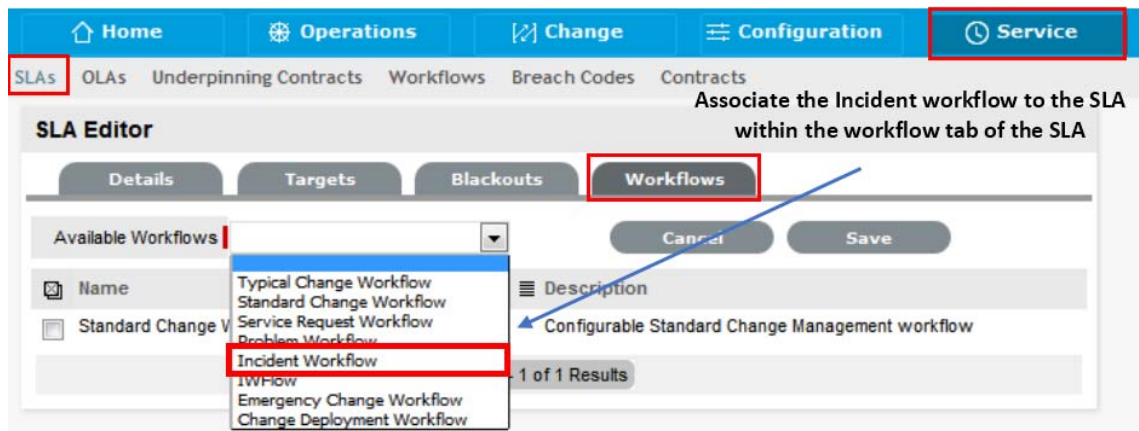
### Implementing Incident Management

To set up the Incident Management Process in the system, the following steps are to be completed:

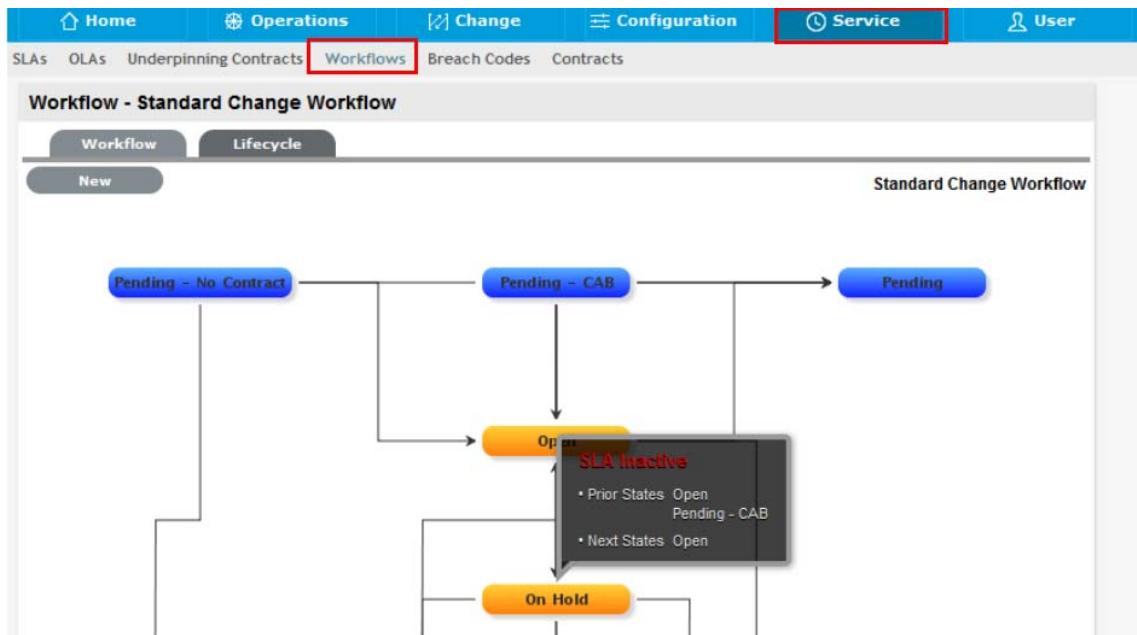
1. Assign the Incident Management Process to the relevant Users within the User Information screen under the User>Users tab. (See:[Create a User](#).)



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' configuration for the 'Device-Incident Team'. The 'Details' tab is selected, displaying fields for Team Name (Device-Incident Team), Process (Incident), Team Lead (Sankar R), Incoming Email, Email Display Name, Customer Notification (Email), and Technician Notification (Email). The 'Layers' tab is also visible, with a note 'Create escalation layer in the Layers tab' pointing to the 'Layers' section. The 'Service' tab is also visible, with a note 'Create default workflow in the Service tab' pointing to the 'Service' section.

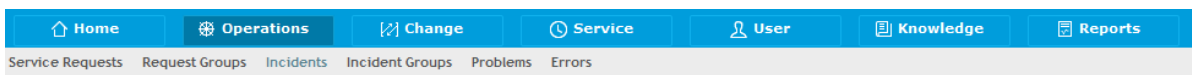
5. Associate the SLA to an Item or Customer or Org Unit. This final step ties all the elements together when an Incident is created, as the SLA associated with the Item, Customer or Org Unit assigned to the Incident determines the Workflow, Team and Technicians that are made available within the Incident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

## Incidents

- ◆ “Creating an Incident:” on page 308
- ◆ “Incident Queue” on page 308
- ◆ “Incident Search Tips:” on page 308
- ◆ “RSS Feeds” on page 309

- ◆ “Create an Incident for an existing Customer” on page 309
- ◆ “Create an Incident for a new Customer” on page 310
- ◆ “Incidents for Partner Organization Customers” on page 310
- ◆ “Supported Org Units Only option” on page 311
- ◆ “Customer Tab” on page 312
- ◆ “Quick Calls” on page 314
- ◆ “Contract Tab” on page 316
- ◆ “Details Tab” on page 317
- ◆ “Request Subject” on page 317
- ◆ “Analysis Tab during Incident Creation” on page 318
- ◆ “Proactive Solution Analysis” on page 319
- ◆ “Workarounds” on page 319
- ◆ “Analysis” on page 319
- ◆ “Searching for a Solution” on page 319
- ◆ “Proactive Analysis during Incident Creation” on page 322
- ◆ “Converting an Incident to a Service Request” on page 323
- ◆ “Linking requests” on page 323
- ◆ “Creating a Problem or Change Request within an Incident” on page 324
- ◆ “Creating an Alert” on page 324
- ◆ “Article Button” on page 325
- ◆ “Remove Button” on page 326
- ◆ “Workaround Article” on page 326
- ◆ “Creating a Workaround Article” on page 327
- ◆ “Requests Tab” on page 328
- ◆ “Summary Tab” on page 329
- ◆ “Notes Tab” on page 336
- ◆ “Attachments Tab” on page 342
- ◆ “Impact Tab” on page 343
- ◆ “Audit Tab” on page 347
- ◆ “Related Requests” on page 350
- ◆ “Closing Incidents within Groups” on page 352
- ◆ “Status” on page 353
- ◆ “Updating an Incident's Status” on page 354
- ◆ “Incidents with a Pending-No Contract Status” on page 355
- ◆ “Viewing a Status Note” on page 355
- ◆ “SLA Triggers and Incident Status” on page 355
- ◆ “Priority” on page 356
- ◆ “Setting Incident Priority” on page 356

- ◆ “Incident Assignment and Escalation” on page 357
- ◆ “Incident Assignment” on page 357
- ◆ “Automated Escalation” on page 358
- ◆ “Manual Escalation” on page 358
- ◆ “Escalation Control” on page 358
- ◆ “Workflow” on page 360
- ◆ “Moving through the Workflow” on page 360
- ◆ “Assigning a State with an Underpinning Contract” on page 361
- ◆ “OLA Status Due” on page 362
- ◆ “Team Assignment during the Workflow Lifecycle” on page 362
- ◆ “Pending - No Contract Status” on page 362
- ◆ “Entering a Request via Email” on page 363
- ◆ “Grouping Incidents” on page 364
- ◆ “Grouping Incidents” on page 365
- ◆ “Billing/Contracts” on page 367



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.

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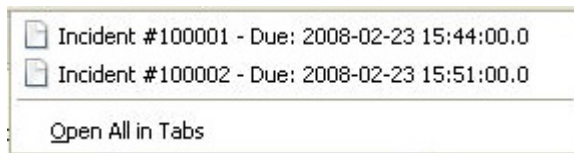
**NOTE:** For information regarding request assignment, reviewing a request, adding notes or updating the status, refer to [Working on a Request.](#)

---

## 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 the 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.

**Request Information**

Customer Details

**Find Customer**

First Name  Email

Last Name  Phone

Username  Org. Unit

Supported Org. Units Only ⊞

| Name                           | Phone | Org Unit                             |
|--------------------------------|-------|--------------------------------------|
| <a href="#">James Stewart</a>  |       | Micro Focus - Information Technology |
| <a href="#">Jason Blackett</a> |       | 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 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: Dr.

First Name: Ashlev

Last Name: Adam

Username: vouges

Password: Reset Password

Web access:  Enabled  Disabled

**Contact**

Primary Email: aav@nsd.com

Send To: Primary Email

Org. Unit: Micro Focus

Find Org. Unit (Name)

Line Manager: Andy Fair

Find Line Manager (Last Name)

Address 1

Address 2

City

Zip

Country

Email Locale: English

Phone

Fax

Pager

Mobile (Required for SMS)

SMS Override:  Override Address?

**Partner**

Customer of: PO1

Locale: PO1

Time zone: Paris, E

Last Login

**Roles**

Current

Administrator  Supervisor

Manager  Technician

Finance  Partner

Customer

Default Portal: Customer Portal

**Details**

Custom 1

Notes

Partner Organisation associated with a Customer within this field


Delete Cancel Save

### 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](mailto: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

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    |
|------------------------------|--------------|------------|-----------|
| <a href="#">Service Desk</a> | Service Desk |            | Available |
| <a href="#">Wifi Service</a> | 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**

Title

Name Francis Young

Org. Unit MyCompany - Azure

Room

Email francis@

Phone

Mobile

Fax

Pager

Address 1 Suite 7

Address 2 75 No Way

City Beautiful

State Victoria

Zip 3907

Country Australia

**Item**

Item Number 100003

Category Service

Item Type Email Service

Identifier

Team Incident Team

Room

Service Gold

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.

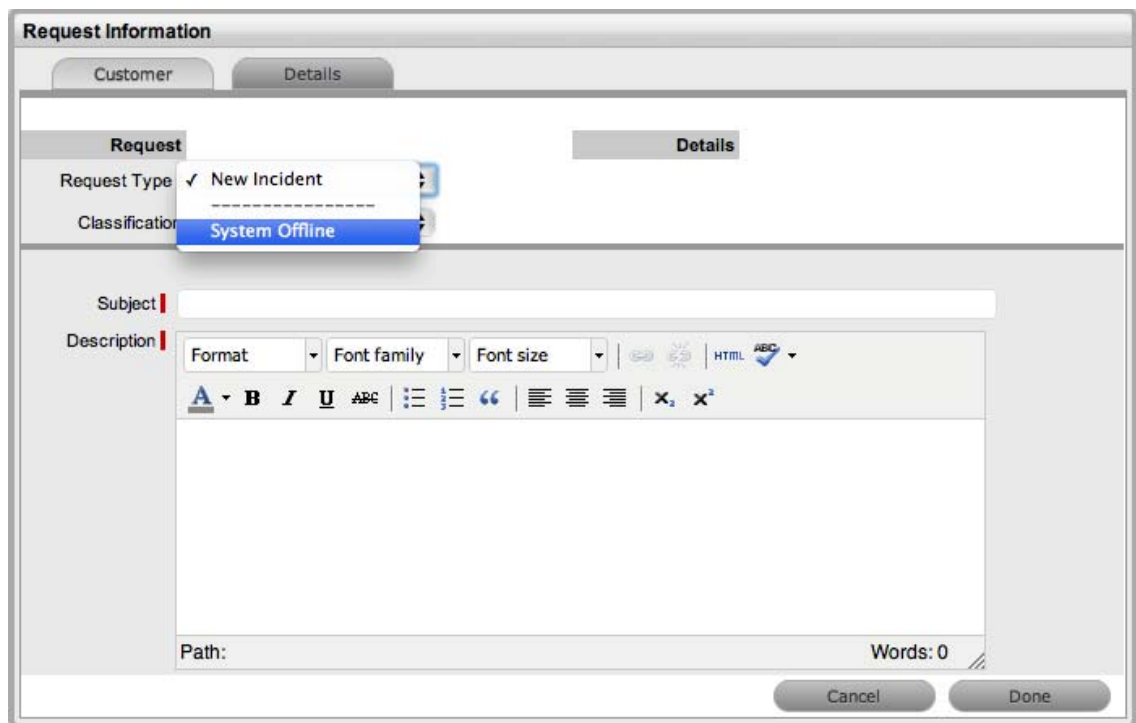
---

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 is open, showing 'New Incident' with a checkmark and 'System Offline' highlighted. Below the dropdown is a dashed line. The 'Classification' field is empty. The 'Subject' field is empty. The 'Description' field is empty and has a rich text editor toolbar above it. The toolbar includes options for Format, Font family, Font size, and various text formatting icons (bold, italic, underline, ABC, list, quote, indent, x<sub>2</sub>, x<sup>3</sup>). The 'Path' field is empty. The 'Words: 0' indicator is visible. At the bottom right, there are 'Cancel' and 'Done' buttons.

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.

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## 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 the 'Request Information' form with the 'Details' tab selected. The 'Request' section includes a 'Request Type' dropdown set to 'New Change', a 'Classification' dropdown set to 'General', and a 'Subject' dropdown with options 'Account Details' and 'Downloads'. The 'Description' field is a rich text editor with a dropdown menu showing options: 'General', 'Manuals', 'Printing', and 'Setup/Installation'. The 'Path: p' field is at the bottom left. 'Cancel' and 'Done' buttons are at the bottom right.

5. Enter all relevant information within the Description field

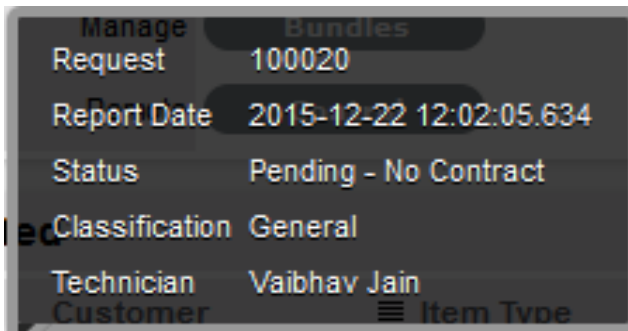
This is a mandatory field.

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.



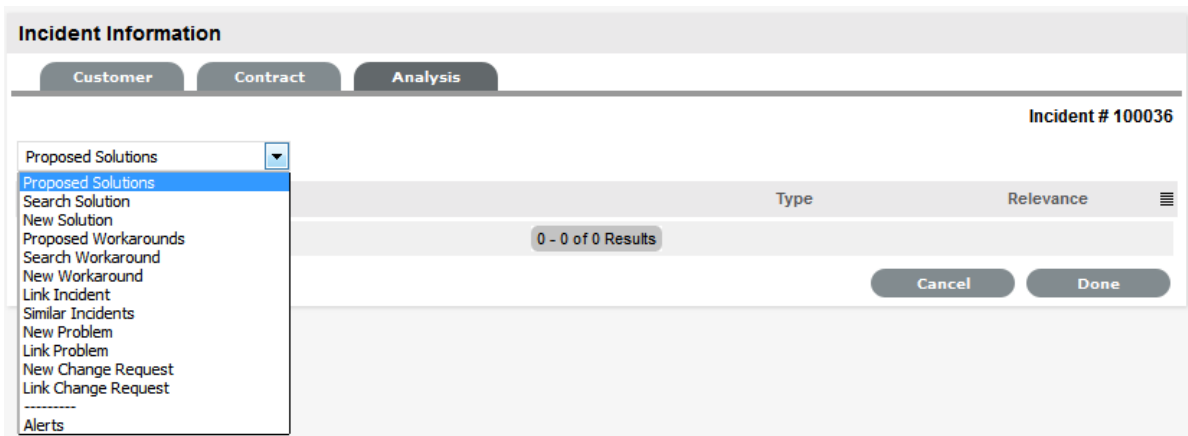
**NOTE:** The system Administrator can make the Subject field mandatory by enabling the Subject Required option in the Setup>Privileges>User tab.

### 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.

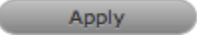


If analysis is not required during the request creation process, click Done to continue to the Summary tab.

## 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

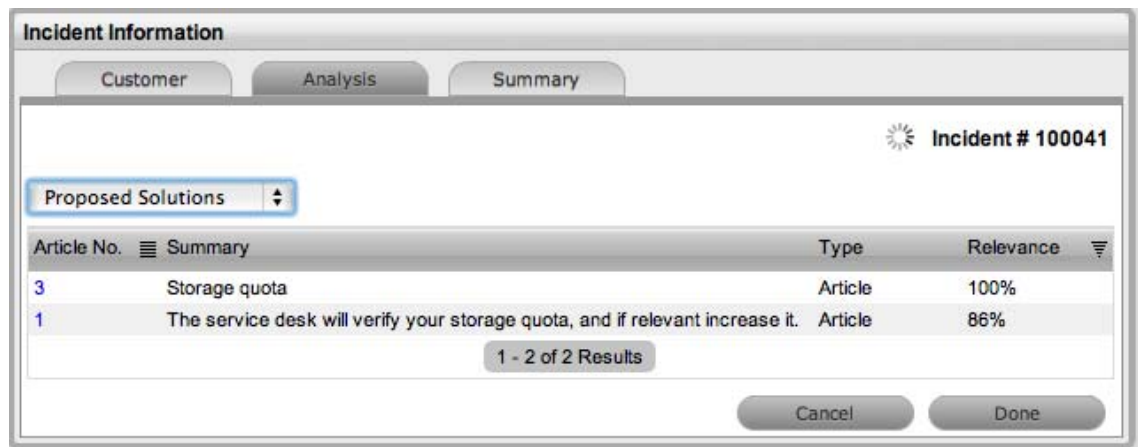
To Search for a Solution:

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.



4. Select from the available options, as follows:

---

## Analysis Tab Drop-down Options

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|                            |   |
|----------------------------|---|
| 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: <a href="#">Solution Article</a> .  |
| 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.   |

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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.

The screenshot displays the 'Analysis' tab of an incident management system for Incident # 100041. The interface includes tabs for 'Customer', 'Analysis', and 'Summary'. A sidebar on the left contains sections for 'Flags', 'Item Types', and 'Content'. The main content area shows the following details:

- 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:

At the bottom, there are tabs for 'Related', 'Attachments', and 'History'. Below these is a search bar with columns for 'File Description', 'Size', 'Date', and 'Public'. The search results show '0 - 0 of 0 Results'. A red arrow points to the 'Apply' button at the bottom right of the search area.

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. |

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## Link with other requests

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### 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.

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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.

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## 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.

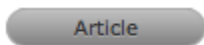
3. Click New
4. Refine the content for each required field:



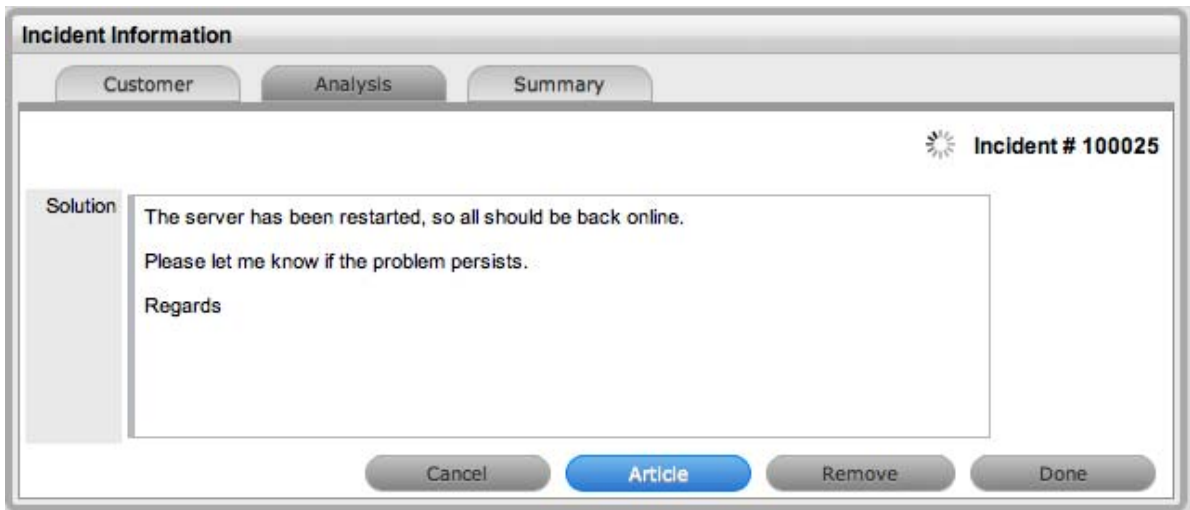
| Alert Details | Description   |
|---------------|---|
| Created       | The current date and time.  |
| Publish       | The date the Alert is published. Use the calendar icon to the right of the field, to select a Publish date.<br><br>Set to a date in the future, or use the default to publish the Alert 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"> <li>◆ Information – for general Alerts</li> <li>◆ Warning – to warn Users of potential issues</li> <li>◆ Urgent – to publish an urgent actionable message.</li> </ul> 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"> <li>◆ Specific Customer or User - In the Find User or Customer list, click search to select the recipient from the drop-down list.</li> <li>◆ User Role - An Alert sent to a User Role will go to all Users with that Role.</li> <li>◆ Personal Alert - A personal Alert appears on the User's own screen at the Publish date.</li> <li>◆ Organizational Units - In the Find Org. Unit field, search and select the recipients.</li> <li>◆ Public - A Public Alert appears when the Public Alert link is selected on the Login Page.</li> </ul> |
| Title         | Enter the title of the Alert.   |
| Message       | Enter the main content of the Alert.  |

5. Click Save.

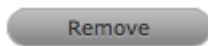
## Article Button



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:

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### Analysis Tab Options

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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

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## Analysis Tab Options

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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

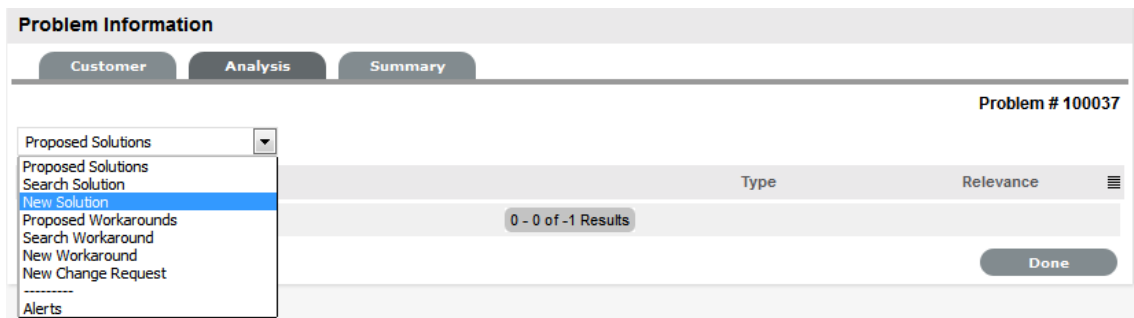
Displays Knowledge Base editor to allow User to enter a new Workaround. Define visibility, enter a Summary, a Description and Save.

---

## 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

**Problem Information**

Customer Analysis Summary

**Problem # 100011**

**Flags**

Type Workaround  
Visibility Assigned Request  
Status Published  
Item Category Software  
Classification General  
Review Date 06/17/11

**Item Types**

Service Manager

**Content**

**Problem**

Format Font family Font size HTML ABC

**A B I U ABC** | **☰ ☷ ☹** | **☰ ☷ ☹** | **x<sub>2</sub> x<sup>2</sup>**

Find issue behind the exception errors

Path: Words: 6

**Workaround**

Format Font family Font size HTML ABC

**A B I U ABC** | **☰ ☷ ☹** | **☰ ☷ ☹** | **x<sub>2</sub> x<sup>2</sup>**

Path: Words: 0

Created 06/15/11 22:45  
Revised 06/15/11 22:45

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 329](#)
- ♦ [“Changing an Incident's Customer or Item” on page 333](#)
- ♦ [“Converting an Incident to a Service Request” on page 334](#)
- ♦ [“Item Relationship Map and Assignment” on page 335](#)
- ♦ [“Updating the Item associated with the Request” on page 335](#)






### **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.

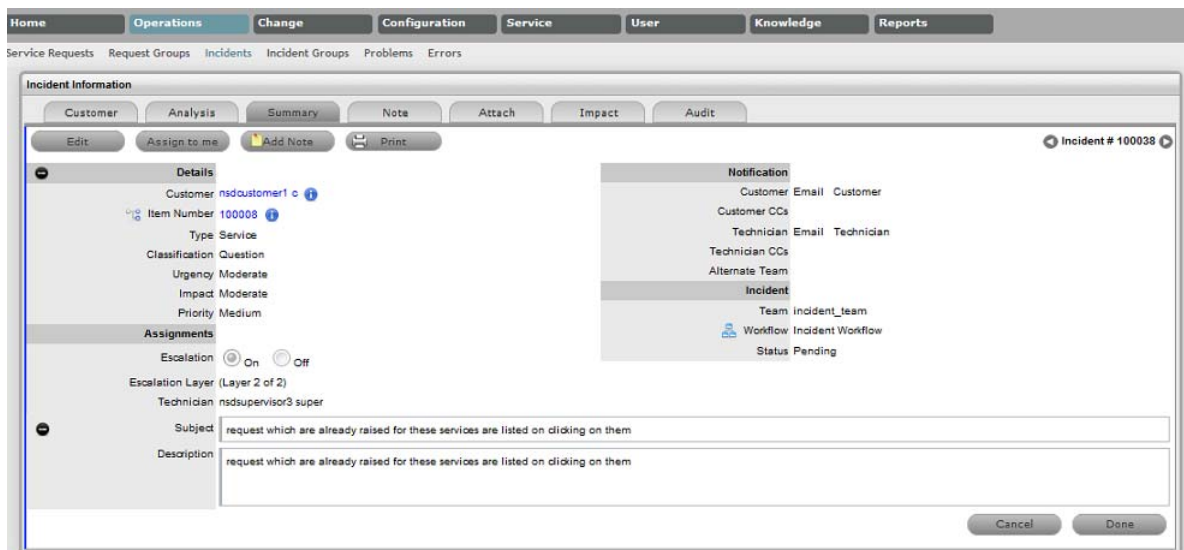
The Incident Information Summary tab includes the following:

| Summary Tab    | Description  |
|----------------|--|
| <i>Details</i> | <p>The following details are displayed:</p> <ul style="list-style-type: none"> <li>◆ <b>Customer:</b> The customer assigned to the Incident. Click on the customer name link to view customer information. Scroll over the information icon  next to the <b>Customer</b> for quick information such as <b>Username</b>, <b>Org.Unit</b>, <b>Phone</b> and <b>Local Time</b>.</li> <li>◆ <b>Item:</b> An item assigned to the Incident. Select the <b>Item Number</b> link for more information about the Item. Scroll over the information icon  next to the <b>Item Number</b> to view Item information recorded on the <b>Details</b> tab.</li> </ul> <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"> <li>◆ <b>Send Survey:</b> 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.</li> <li>◆ <b>Type:</b> Service request type such as Internet Explorer</li> <li>◆ <b>Classification:</b> Displays the Incident Classification that was selected when the Incident was created. This can be updated, if required.</li> <li>◆ <b>Urgency:</b> Indicates if the Incident is to be taken up on priority.</li> <li>◆ <b>Impact:</b> 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.</li> <li>◆ <b>Priority:</b> Shows the priority of the Incident, which determines the Service Level triggers applied to the Incident.</li> </ul> <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"> <li>◆ <b>Escalation:</b> 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.</li> <li>◆ <b>Escalation Layer:</b> 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.</li> <li>◆ <b>Technician:</b> The name of the Technician assigned to the Incident.<br/>When an Incident is assigned to the Queue, the name applied in the Technician field is System User.</li> <li>◆ <b>Subject:</b> 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.<br/><b>NOTE:</b> The Administrator can set the Subject field to be required for Technicians and Customers within the Setup&gt;Privileges&gt;User and Setup&gt;Privileges&gt;Customer tabs, respectively.</li> <li>◆ <b>Description :</b> 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.</li> </ul> |
| <i>Notification</i> | <p>The following details are displayed:</p> <ul style="list-style-type: none"> <li>◆ <b>Customer:</b> 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.</li> <li>◆ <b>Customer CCs:</b> <i>Customer CCs</i> is a free text field for any additional notification recipients, these can be divided into Customer and Technician CC lists.</li> <li>◆ <b>Technician:</b> 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.</li> <li>◆ <b>Technician CCs:</b> <i>Technician CCs</i> is a free text field for any additional notification recipients, these can be divided into Customer and Technician CC lists.</li> <li>◆ <b>Alternate Team:</b> This is visible if the Notify Alternate Team option is enabled in the Admin&gt;Email&gt;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</li> </ul>   |

| Summary Tab   | Description  |
|---------------|--|
| Incident      | <p>The following details are displayed:</p> <ul style="list-style-type: none"> <li>◆ <b>Team:</b> 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.</li> <li>◆ <b>Workflow:</b> 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.</li> </ul> <p>Select  to view the Workflow in its entirety.</p> <ul style="list-style-type: none"> <li>◆ <b>Status:</b> Shows the current Workflow State of the Incident.</li> <li>◆ <b>Next Action:</b> 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.</li> <li>◆ <b>Status Due:</b> Details the expiry time for the current Workflow State if the State has an OLA assigned.</li> </ul>   |
| Service Terms | <p>The following details are displayed:</p> <ul style="list-style-type: none"> <li>◆ <b>Agreement :</b> Displays the Service Level Agreement assigned to the Incident. The SLA is derived from either the Item, Customer or Organizational Unit.</li> <li>◆ <b>Service Manager:</b> Displays the name of the Service Level Manager responsible for overseeing Incidents related to the assigned service agreement.</li> <li>◆ <b>Progress:</b> 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"> <li>◆  - Workflow is in an SLA paused state. Triggers will not fire.</li> <li>◆  - Workflow is in an SLA timers on state. Triggers will fire.</li> <li>◆  - Workflow is in an Exit state and the SLA has been successfully maintained.</li> <li>◆  - Assigned SLA has been breached and Workflow is in an Exit state.</li> </ul> </li> <li>◆ <b>Dates:</b> Summarizes the important date details for the Incident. The due date is automatically calculated based on the Service Level assigned to the Incident.</li> <li>◆ <b>Time Recorded:</b> Displays the amount of time the Incident has been open and worked on.</li> <li>◆ <b>Affects:</b> Displays the number of Users assigned to the Item.</li> </ul> |





**NOTE:** Only Technicians assigned to the Team can edit the Incident.

### Summary Tab Buttons

- Edit

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.

Assign to me

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.

Add Note

Opens the Incident in edit mode and moves directly to the New Note editor.

Duplicate

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.

Print

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.

**NOTE:** To remove Private Notes from the output, remove the tick in the 'Show Private Notes' box.

Alerts

Allows the User to create or view reminders related to the Incident. When published it will be displayed like the normal alert icon.

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.

### 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:

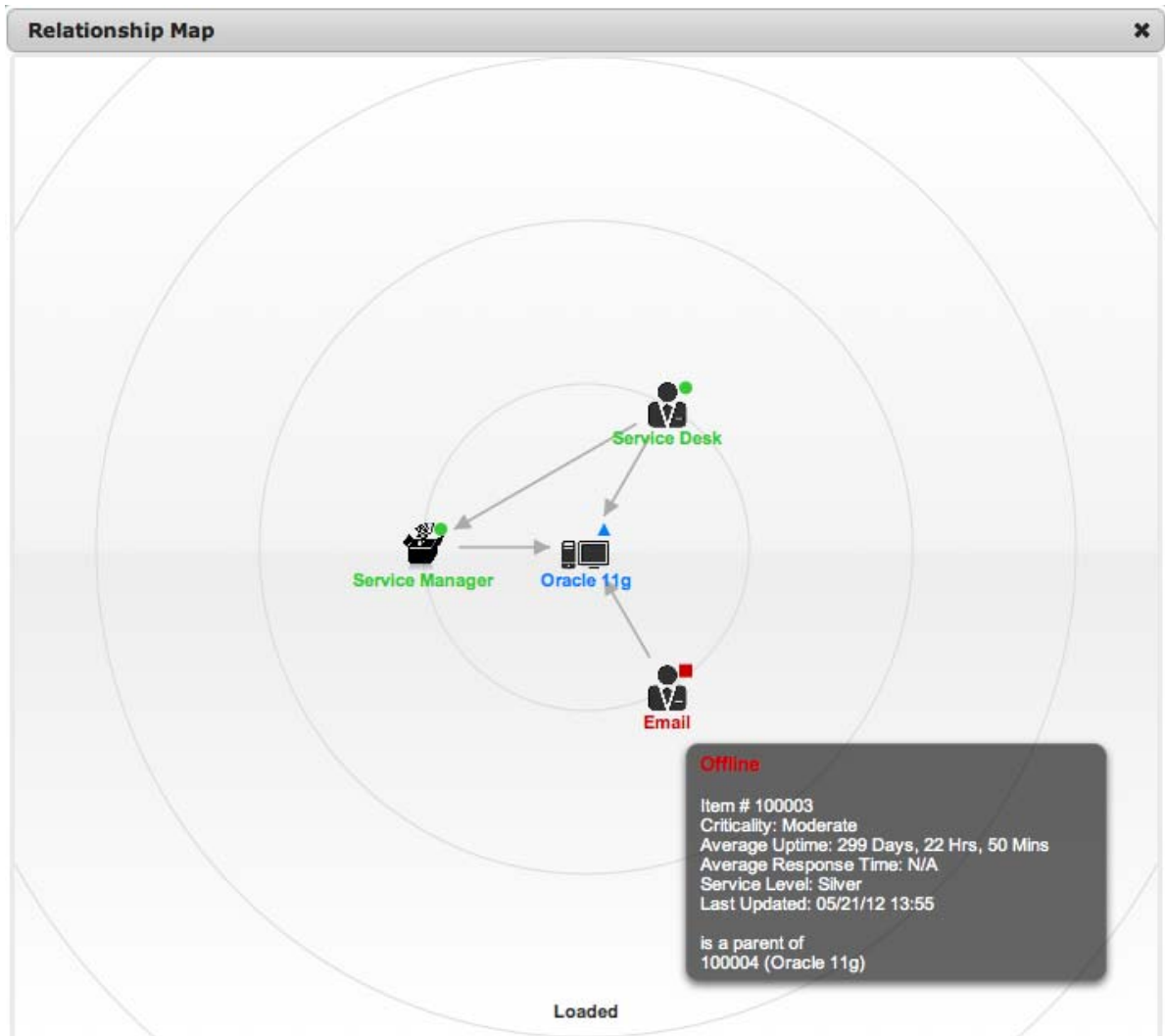
1. Select Edit within the Analysis tab

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.

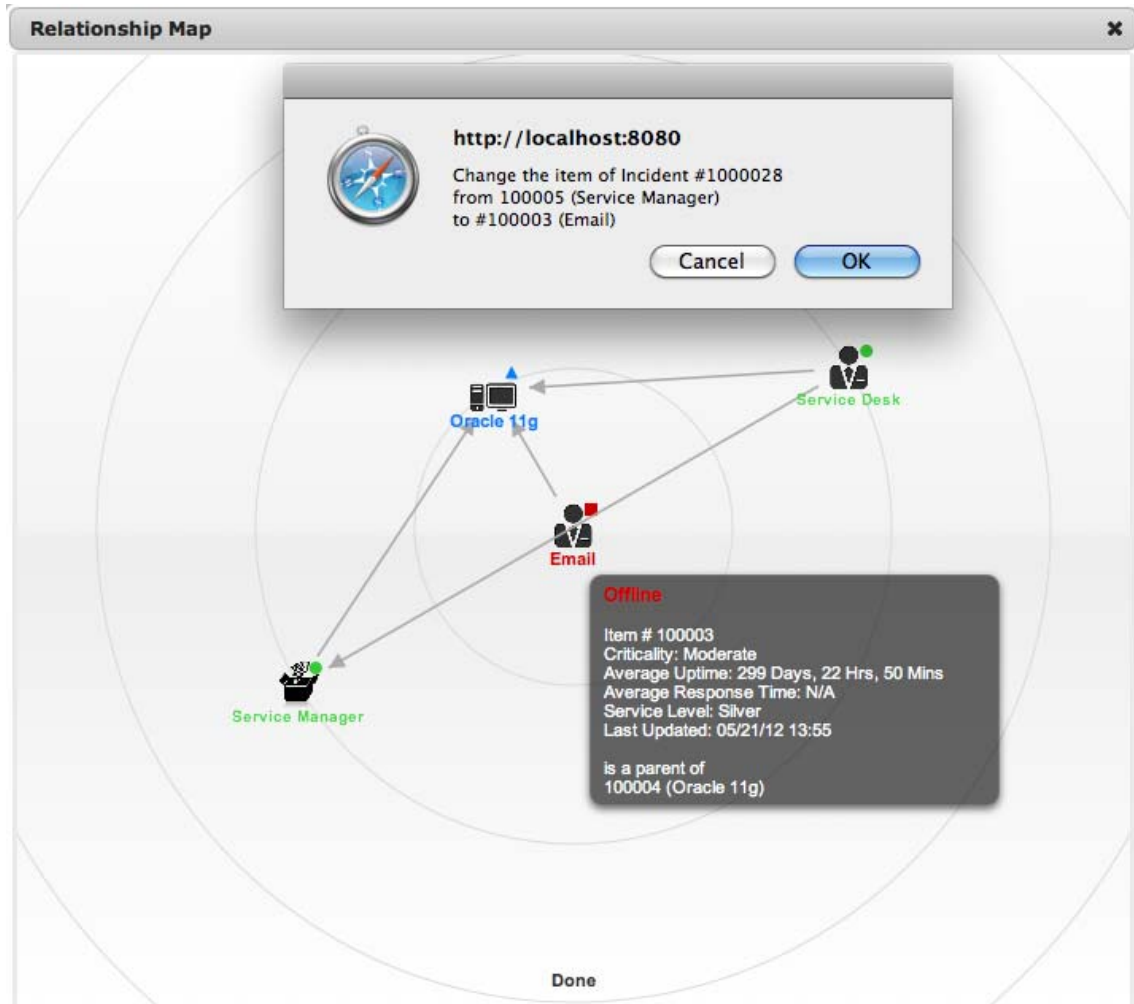


### **Updating the Item associated with the Request**

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 337](#)
- ♦ [“Add Note” on page 337](#)
- ♦ [“Viewing All Notes” on page 337](#)
- ♦ [“Adding a Note” on page 337](#)
- ♦ [“Create Knowledge” on page 338](#)

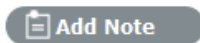
- ◆ “Solution” on page 339
- ◆ “Propose Handshake” on page 339
- ◆ “Draft Note” on page 340
- ◆ “Changing the Status of an Incident Note” on page 340
- ◆ “Viewing a Note” on page 340
- ◆ “Replying to a Note” on page 340
- ◆ “Emailing Saved Incident Notes” on page 341
- ◆ “Adding Notes to Groups” on page 341

## **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**

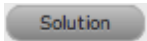
---

**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***



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.

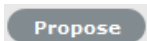
For Create Knowledge enabled Notes the content will be recorded as the solution under the Analysis tab. The Status of the Incident will change to the default Exit State of the assigned Workflow.

---

**NOTE:** This option is not available if the Handshaking facility is enabled in Admin> Setup> Privileges> Requests.

---

### ***Propose Handshake***



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 |
|--------------------|----------------|--|----------|---|---|---------|
| <a href="#">12</a> | 01/12/16 11:43 | ---- Initial Description ----<br>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

Reply

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***

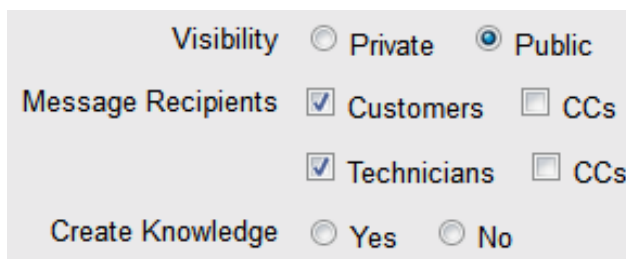
When a Note is created for an Incident that belongs to a Group, the Apply to Group option is visible within the Notes tab. If the new Note is to be assigned to all requests within the Group, select the Apply to Group option.

---

**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 342
- ♦ “Adding an Attachment” on page 342
- ♦ “Deleting an Attachment” on page 343

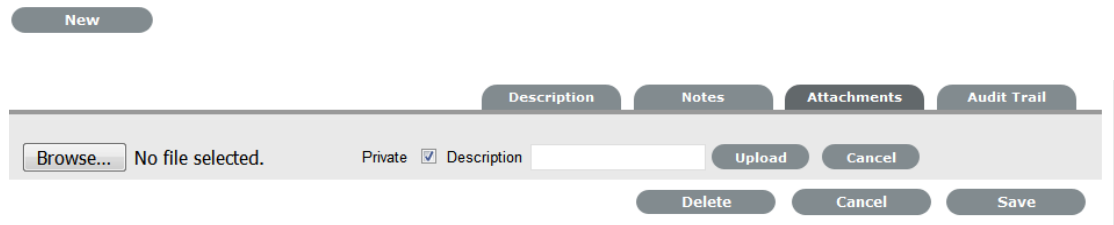
### Attachments

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

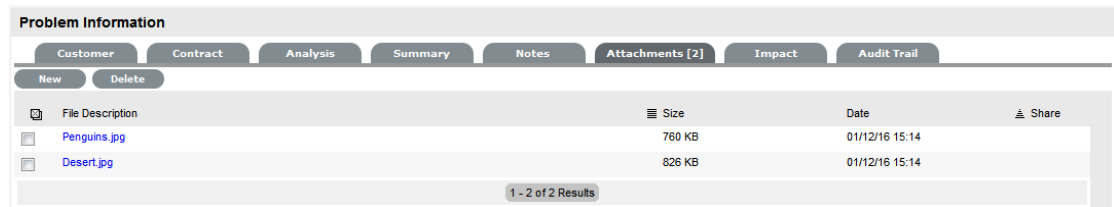


The screenshot shows a 'New' button at the top left. Below it is a horizontal bar with tabs for 'Description', 'Notes', 'Attachments', and 'Audit Trail'. The 'Attachments' tab is selected. Below the tabs is a form area with a 'Browse...' button, the text 'No file selected.', a 'Private' checkbox (checked), a 'Description' input field, and 'Upload' and 'Cancel' buttons. At the bottom of the form are 'Delete', 'Cancel', and 'Save' buttons.




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.



The screenshot shows the 'Problem Information' screen with tabs for 'Customer', 'Contract', 'Analysis', 'Summary', 'Notes', 'Attachments [2]', 'Impact', and 'Audit Trail'. The 'Attachments [2]' tab is selected. Below the tabs is a table with columns for 'File Description', 'Size', 'Date', and 'Share'. The table contains two rows of attachment data.

| File Description   | Size   | Date           | Share   |
|--|--------|----------------|---|
|  <a href="#">Penguins.jpg</a> | 760 KB | 01/12/16 15:14 |  |
|  <a href="#">Desert.jpg</a>   | 826 KB | 01/12/16 15:14 |   |

1 - 2 of 2 Results

**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 343](#)
- ♦ [“Service Targets” on page 344](#)
- ♦ [“Service Level Breaches” on page 344](#)
- ♦ [“Services Affected” on page 345](#)
- ♦ [“Estimates” on page 345](#)
- ♦ [“Contract Monitor” on page 346](#)

## ***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:

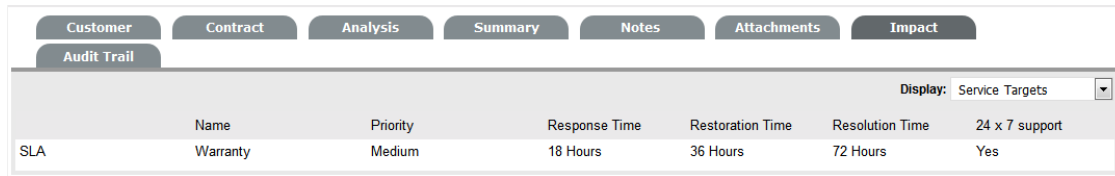
- ♦ Service targets
- ♦ Workflow estimates
- ♦ The impact of the current Incident on related infrastructure.

The drop-down filter options within the Impact tab include:

| <b>Options</b>         | <b>Description</b>  |
|------------------------|---|
| 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.

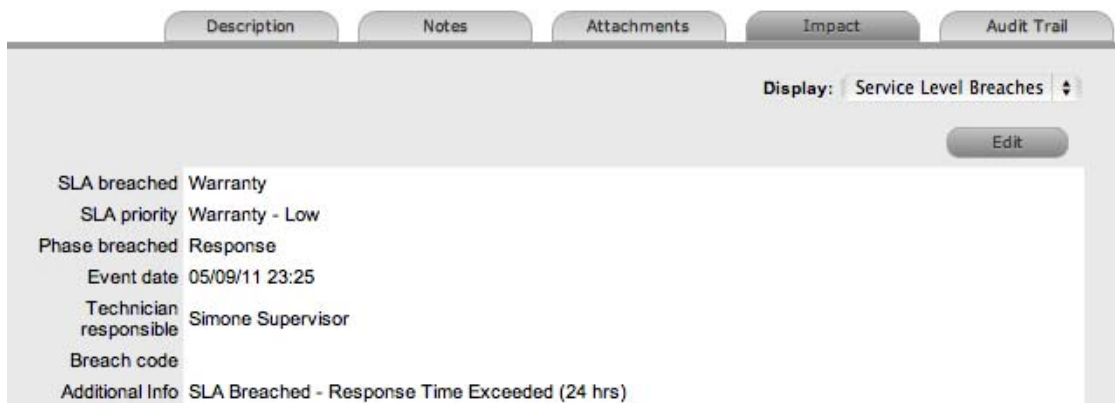


| Name     | Priority | Response Time | Restoration Time | Resolution Time | 24 x 7 support |
|----------|----------|---------------|------------------|-----------------|----------------|
| Warranty | Medium   | 18 Hours      | 36 Hours         | 72 Hours        | Yes            |

For more information on Service Targets, see: [Service Level Agreements](#).

## Service Level Breaches

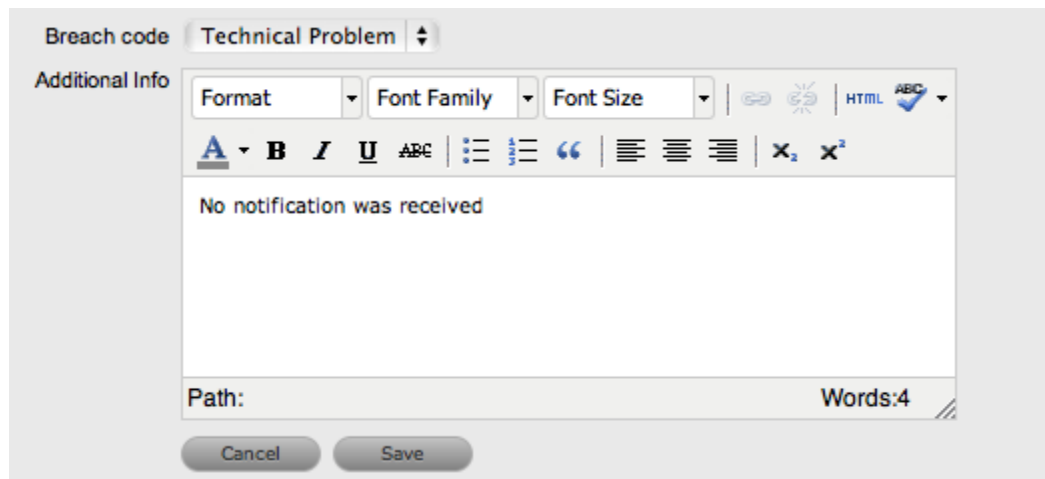
When an Incident Service Level Agreement is violated, a service level breach is recorded against the Incident. The User assigned to the Incident will be notified and asked to provide a reason for the breach and assign a breach code.



|                        |  |
|------------------------|--|
| 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



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.

| <b>Options</b> | <b>Description</b>   |
|----------------|--|
| 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 ← Breached Response Time

Responded

Expected Restoration Time: 05/13/11 21:21 ← Check when the Service Provider meets the Restoration or ResolutionTime

Restored

Expected Resolution Time: 05/15/11 21:21 ← Check when the Service Provider meets the Restoration or ResolutionTime

Resolved

Comments

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 347](#)
- ◆ [“Audit Trail” on page 348](#)
- ◆ [“Resource Utilization” on page 348](#)
- ◆ [“Item Audit Trail” on page 348](#)
- ◆ [“Service Terms” on page 348](#)
- ◆ [“Time Recorded” on page 350](#)

## 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.

| Customer Contract Analysis Summary Notes Attachments Impact |                       |   |          |                      |                      |                  |
|---|-----------------------|---|----------|----------------------|----------------------|------------------|
| Audit Trail   |                       |   |          |                      |                      |                  |
| Date  | Status                | Action  | By       | Display: Audit Trail |                      |                  |
| 01/12/16 12:23  | Pending               | Maintenance contract 15 created.                          | Sankar R | Audit Trail          | Resource Utilization | Item Audit Trail |
| 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<br>Subject: A<br>Descri... | Sankar R |                      |                      |                  |

1 - 4 of 4 Results

### **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**

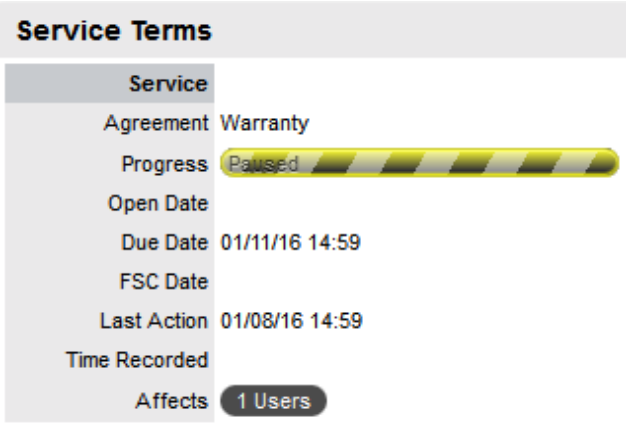
The Resource Utilization option displays a breakdown of the time an Incident was worked on at each level of support. It details the User's name, the escalation layer they belong to and the amount of time they have spent on the Incident.

### **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.



The screenshot shows a sidebar titled "Service Terms" with the following information:

|               |  |
|---------------|--|
| Service       |  |
| Agreement     | Warranty   |
| Progress      | Paused  |
| Open Date     |  |
| Due Date      | 01/11/16 14:59   |
| FSC Date      |  |
| Last Action   | 01/08/16 14:59   |
| Time Recorded |  |
| Affects       | 1 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 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.  |
| 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.

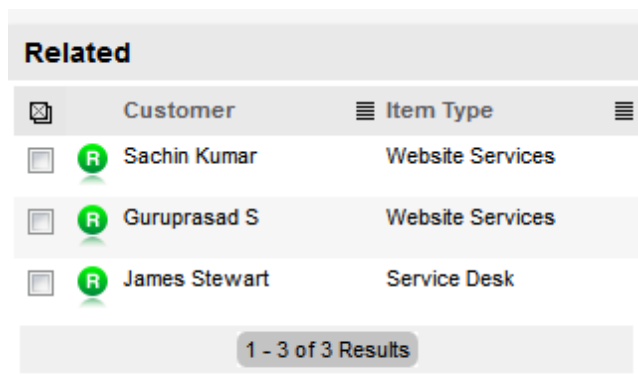
The Time Recorded is used by the system when the Contracts functionality is in use.

### **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.



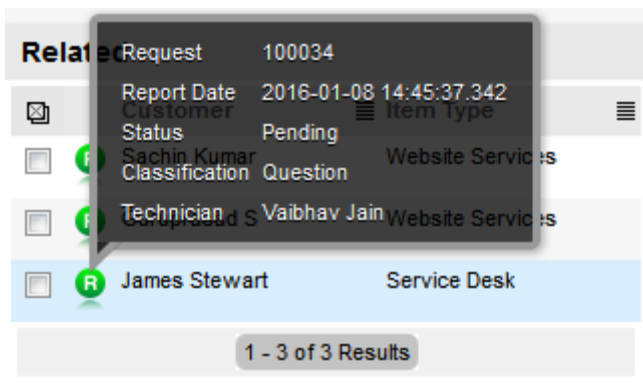
The screenshot shows a sidebar window titled "Related" with a table of related requests. The table has two columns: "Customer" and "Item Type". Each row includes a checkbox, a green circle with a white 'R' icon, the customer name, and the item type. At the bottom of the table, there is a button that says "1 - 3 of 3 Results".

| <input type="checkbox"/> | Customer  | Item Type        |
|--------------------------|---|------------------|
| <input type="checkbox"/> |  Sachin Kumar  | Website Services |
| <input type="checkbox"/> |  Guruprasad S  | Website Services |
| <input type="checkbox"/> |  James Stewart | Service Desk     |

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.



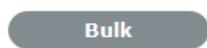
### **Bulk Updates**

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



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



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

The marked requests are removed from the Group.

## Closing Incidents within Groups

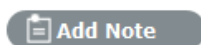
Requests within the Related sidebar can be closed individually by moving the Workflow State to a Exit/Closed State within the Incident Information Screen. Grouped requests can also be closed as a group, by changing the request Status to a Exit/Closed State as part of a Bulk update. (See Bulk Updates above.)

The screenshot shows the 'Editing Multiple Requests' interface with tabs for Customer, Contract, Analysis, and Summary. The 'Details' section includes fields for Priority (Medium), Impact (Moderate), Urgency (Moderate), Workflow (Incident Workflow), and Status. The Status dropdown is open, showing options: Cancelled, Cancelled - Unpaid, Closed - Restored (highlighted), On Hold, On Hold - Client Action, On Hold - Pending Approval, On Hold - Process Escalated, Open, Open - Restored, Pending, and Pending - No Contract. The 'Classifications' section shows 'Account Details' and 'Item' with 'Vamsi Krishna (100026)' and 'Electrical Engg' listed.

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.

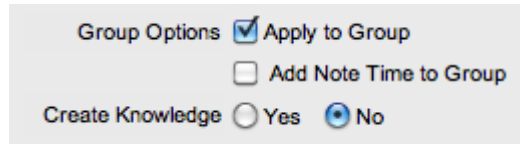
To close related Incidents using this method:

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



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

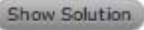
6. If relevant, enable Create Knowledge

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&gt;Privileges&gt;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.

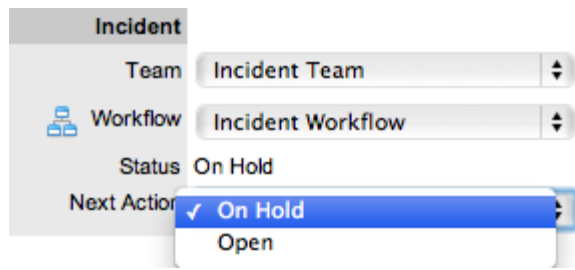
---

## 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:

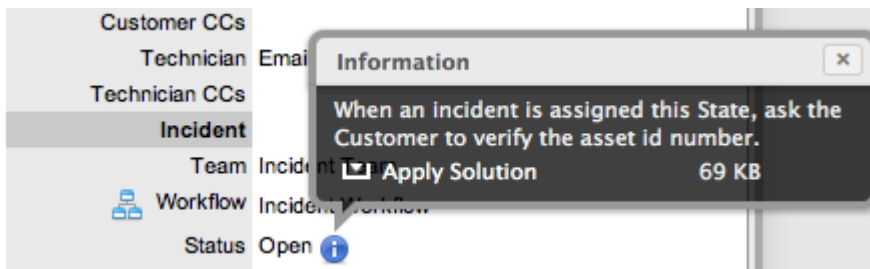
- ◆ Using the Handshaking feature when a Note is added by selecting the Propose button to send and save a Note
- ◆ Closing an Incident when adding a Note using the Solution button
- ◆ Escalating an Incident to a Problem or Change Request
- ◆ When Billing is enabled and payment is not received.

### 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.

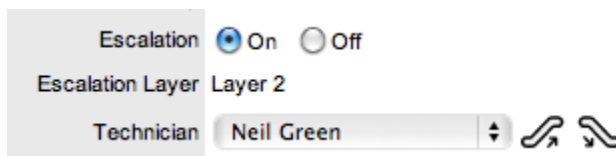
### Automated Escalation

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.

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   |   |
|------------------------|---|
| <b>Incident #:</b>     | 100053  |
| <b>Date Opened:</b>    | 08/18/06 15:24 (mm/dd/yy hh:mm)                   |
| <b>Classification:</b> | Printing  |
| <b>Technician:</b>     | Supervisor User                                   |
| <b>Item #:</b>         | 100005  |
| <b>Item Type:</b>      | word  |
| <b>Identifier:</b>     |   |
| <b>Customer:</b>       | Bob Samson  |
| <b>Company:</b>        | Sales   |
| <b>Due Date:</b>       | 08/21/06 15:24                                    |
| <b>Description:</b>    | 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.

The screenshot shows an 'Incident' form with the following fields:

- Team: TeamSMG
- Workflow: Incident Workflow
- Status: On Hold
- Next Action: On Hold (dropdown menu is open showing options: 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 an incident record with the following sections:

- Contact:** Customer: Lena Benson, Org Unit: Vodafone, Phone: 03 9797 999, Local Time: Mon, 26 Mar 2012 16:44:22, GPS.
- Item:** Type: Service Desk, Number: 100002, Status: Available, Criticality: Moderate.
- Details:** Classification: Question, Urgency: Low, Impact: Very Low, Priority: Low, Escalation Layer: (Layer 1 of 3), Technician: Simone Supervisor (Service Level Manager).
- Notification:** Customer: Email Customer, Technician: Email Technician, Technician CCs: supervisor@mycompany.com.
- Incident:** Team: Incident Team, Workflow: Incident Workflow, Status: Open, Next Action: Outsourced (dropdown menu is open showing 'Outsourced' selected), Underpinning Contract: Service Contractors, Status Due: 03/30/12 15:47.


Annotations with red arrows point to specific fields:

- Red arrow pointing to 'Outsourced' in the Next Action dropdown: "Assigned to the Service Level Manager because 'Assign SLM' option set to 'Yes' within the Outsourced State of teh Workflow configured in the Services>Workflow tab."
- Red arrow pointing to 'Service Contractors' in the Underpinning Contract field: "Due date 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 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.

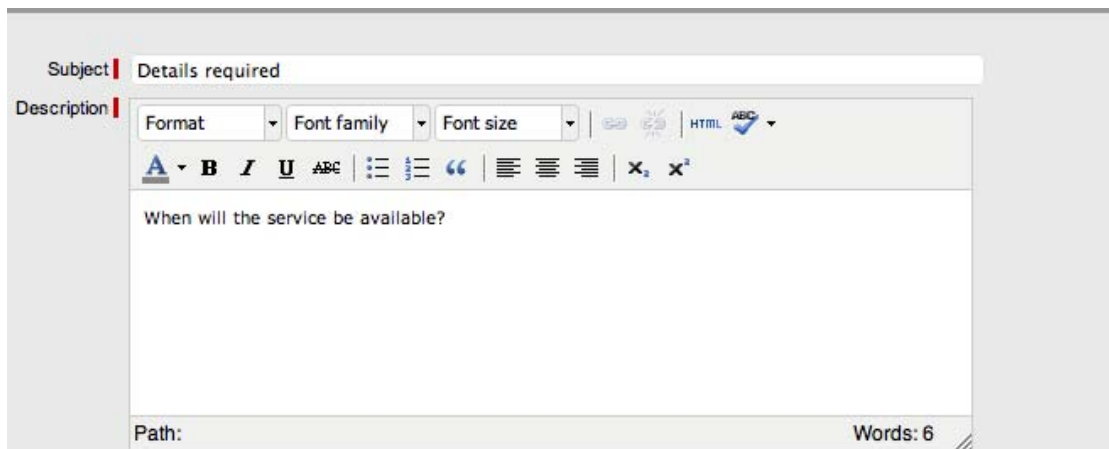
## Pending - No Contract Status

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.



## Entering a Request via Email

The system processes requests via email when the Administrator has enabled the following options, under the Administrator>Setup>Email>Setup tab:

- ◆ Email Polling
- ◆ Create/Update via Email.

The Customer sends an email to the support system email address or to an alias account that has been assigned to a Team of Technicians. The application uses the Customer's email address to verify they have an account, and populates the Description with the body of the email. Any attachments sent with the email are uploaded to the Attachments tab of the newly entered request.

By default, when the application is installed a Classification of General exists. If required, this Classification can be renamed. However, when a new request is received via email, it is assigned the General or the renamed Classification. The Priority is set to Medium and the Item assigned to the request is set to Unknown, unless the Customer only owns one Item in the system, in which case that Item will be assigned to the request. The Classification and Item can be changed by the assigned User when they open the request in edit mode.

---

**NOTE:** If the Allow Unknown option is set to No in the Admin>Setup>Privileges>Requests tab, when a request that is assigned the Unknown Item is opened in Edit mode, the User will not be allowed to save changes to the request without replacing the Unknown Item with an actual Item.

---

Notification that a request has been received is sent to the User assigned to the request, and a confirmation email is sent to the Customer. For further information see [Email Polling and Request Creation](#).

### ***Managing Requests via Email***

Customers can manage requests via email by including the Incident # followed by the specific request number in the Subject field of the email. The request is referenced by its number, and a Note is created in the system using the main text of the email, with any email attachments saved to the Attachments tab.

The audit history of the request is updated and notifications are sent based on the request settings.

### ***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**

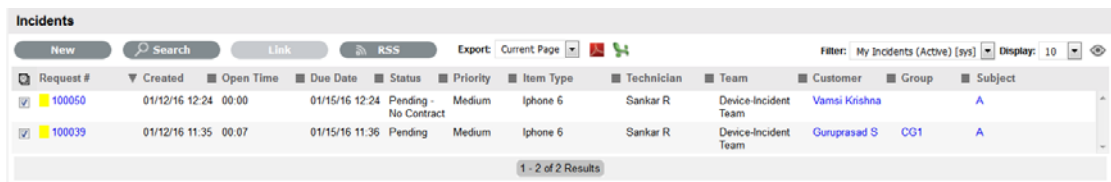
Incidents can be linked together to form project Groups when Incidents are related in some way (e.g., Incidents that have the same solution). New Groups must consist of Incidents that are not already linked.

#### ***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.



| 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 366](#)
- ◆ [“Adding Incidents to an Existing Group” on page 366](#)
- ◆ [“Merging Incident Groups” on page 366](#)
- ◆ [“Grouping Incidents” on page 366](#)
- ◆ [“Related Requests” on page 367](#)

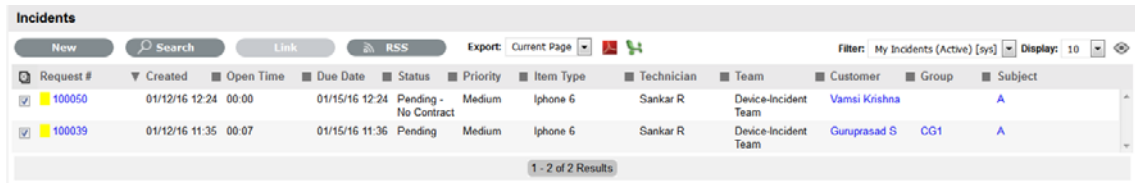
Incidents can be linked together to form project Groups when Incidents are related in some way (e.g., Incidents that have the same solution). New Groups must consist of Incidents that are not already linked.

## 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 the 'Incidents' tab interface. At the top, there are buttons for 'New', 'Search', 'Link', 'RSS', and 'Export'. Below these is a table with columns: Request #, Created, Open Time, Due Date, Status, Priority, Item Type, Technician, Team, Customer, Group, and Subject. Two incidents are listed: 100050 and 100039. Both have checkboxes in the left margin. The 'Link' button is visible above the table. The bottom of the screenshot shows '1 - 2 of 2 Results'.

| 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 368](#)
- ◆ [“Creating an Incident Group using a Group Template” on page 369](#)
- ◆ [“Analysis Tab” on page 373](#)
- ◆ [“Elements Tab” on page 374](#)
- ◆ [“Merging Incident Groups” on page 374](#)
- ◆ [“Closing an Incident Group” on page 375](#)
- ◆ [“Duplicated Incidents” on page 376](#)
- ◆ [“Multi-Item Requests” on page 376](#)

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

Find Item Type (Name)

Format ▼ Font Family ▼ Font Size ▼ | HTML

A B I U ABC | ☰ ☰ ☰ | ☰ ☰ ☰ | x<sub>2</sub> x<sup>3</sup>

Path: p Words: 0

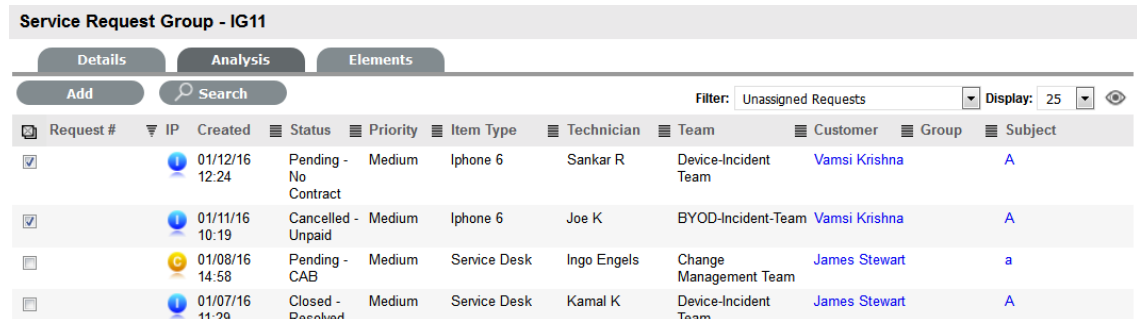
Cancel
Save

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.



| Request #                           | IP | Created           | Status                      | Priority | Item Type    | Technician  | Team                      | Customer      | Group | Subject |
|-------------------------------------|----|-------------------|-----------------------------|----------|--------------|-------------|---------------------------|---------------|-------|---------|
| <input checked="" type="checkbox"/> |    | 01/12/16<br>12:24 | Pending -<br>No<br>Contract | Medium   | Iphone 6     | Sankar R    | Device-Incident<br>Team   | Vamsi Krishna | A     |         |
| <input checked="" type="checkbox"/> |    | 01/11/16<br>10:19 | Cancelled -<br>Unpaid       | Medium   | Iphone 6     | Joe K       | BYOD-Incident-Team        | Vamsi Krishna | A     |         |
| <input type="checkbox"/>            |    | 01/08/16<br>14:58 | Pending -<br>CAB            | Medium   | Service Desk | Ingo Engels | Change<br>Management Team | James Stewart | a     |         |
| <input type="checkbox"/>            |    | 01/07/16<br>11:29 | Closed -<br>Resolved        | Medium   | Service Desk | Kamal K     | Device-Incident<br>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] | [Icons] HTML

[Rich Text Editor Icons]

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.

The screenshot shows the 'New Group' interface with the following sections:

- Customer:** Name: Sachin Kumar, Email: sachin@nsd.com, Phone, Address, City, State, Zip, Country.
- Selected Requests:** A table with columns: Order, Template, Status, Priority, Classification, Duration.
 

| Order | Template | Status      | Priority | Classification | Duration |
|-------|----------|-------------|----------|----------------|----------|
| 1     | G1       | In Progress | Medium   | Question       | 12       |
| 2     | Qc1      | In Progress | Medium   | Question       | 12       |
- Creation:** Radio buttons for 'On Save' (selected) and 'In Sequence'.
- Details:** Three text input fields for 'Service Request Custom 1', 'Service Request Custom 2', and 'Service Request Custom 3' with values 'Cr1', 'Cr1', and 'Cr3' respectively.

Buttons for 'Cancel' and 'Save' are located at the bottom right.

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.<br><br><b>NOTE:</b> 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.

**Incident Group - CG1**

Details Analysis Elements

Remove Export: Current Page Display: 25

| 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.

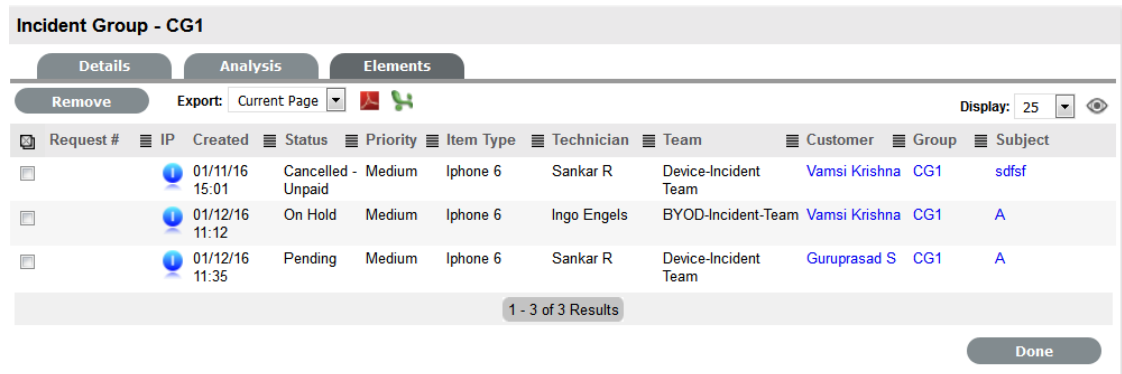
The History tab records details of the Groups merged to form the new Group. Click the No. hyperlink to view the details. The Impact tab records the Type and Number of requests associated with the Group.

### 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

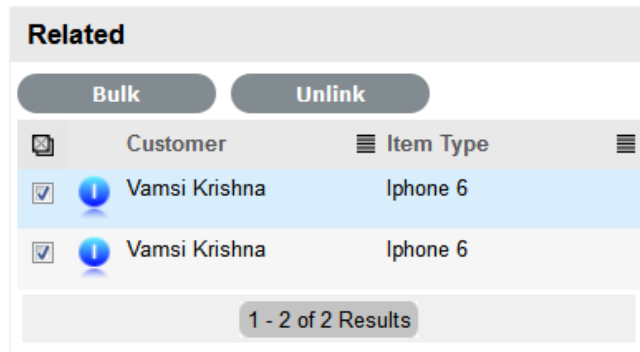


4. Select a Request # hyperlink

The Summary tab of the Incident is displayed.

5. Click Edit

6. Within the Related sidebar check all related Incidents



7. Select the Bulk option

The Bulk Editor screen is displayed.

8. Select the Status of Closed - Resolved or desired Workflow Exit State

The screenshot shows the 'Editing Multiple Requests' interface. At the top, there are three tabs: 'Customer', 'Contract', and 'Analysis'. Below these is a 'Details' section with fields for Priority (Medium), Impact (Moderate), Urgency (Moderate), Workflow (Incident Workflow), and Status. The Status dropdown menu is open, displaying a list of status options: Cancelled, Cancelled - Unpaid, Closed - Resolved, Closed - Restored, On Hold, On Hold - Client Action (highlighted), On Hold - Pending Approval, On Hold - Process Escalated, Open, Open - Restored, Pending, and Pending - No Contract. Below the Status field is a 'Team' dropdown menu with the same list of options. The 'Notification' section is also visible, with fields for Customer, Customer CCs, Technician, Technician CCs, and Alternate Team.

9. Click Save
10. Click Save and Done.

The Details tab of the Group now displays a Status of Closed - Resolved.

## Duplicated Incidents

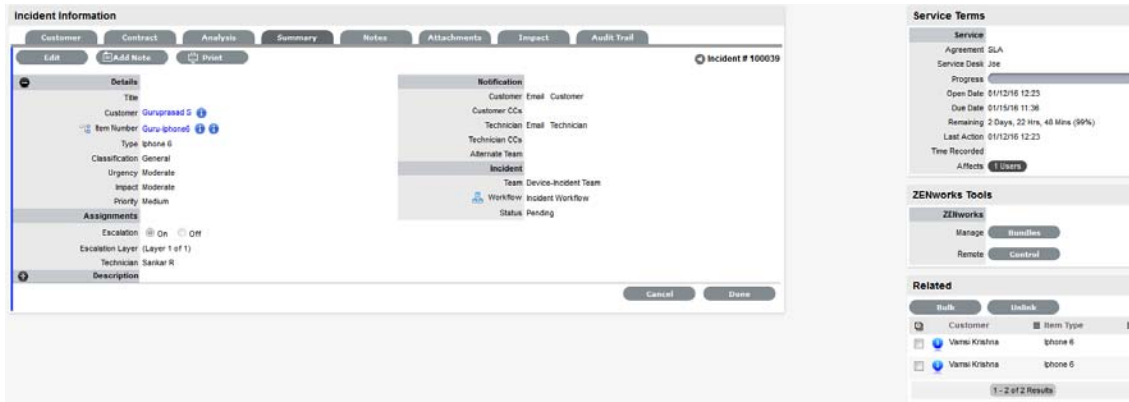
When an Incident is duplicated, the new Incident is linked with the original Incident creating an Incident Group. Incidents can be unlinked in the Group's Elements tab.

## 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.

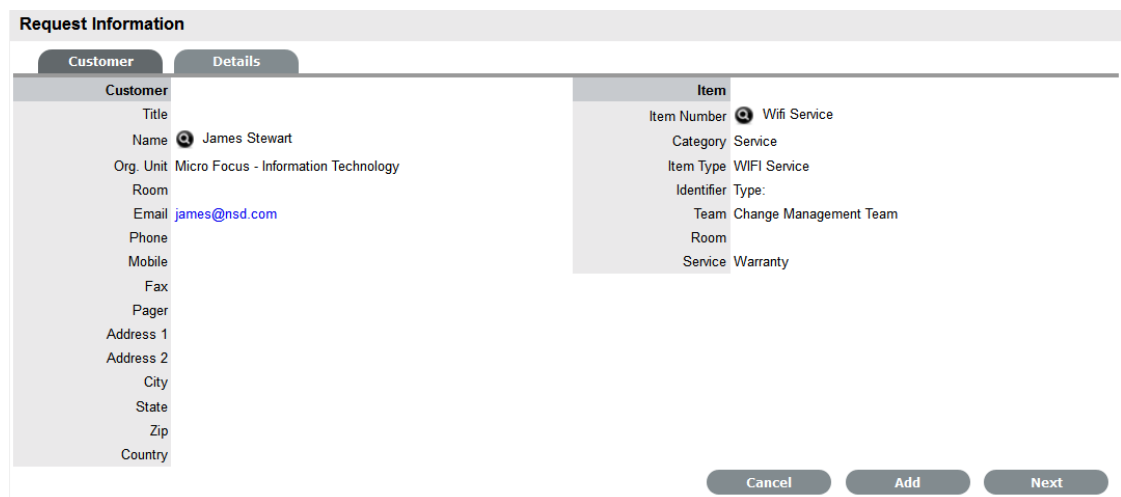
1. Click the relevant Item link if listed below the Find Item search box

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.



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:

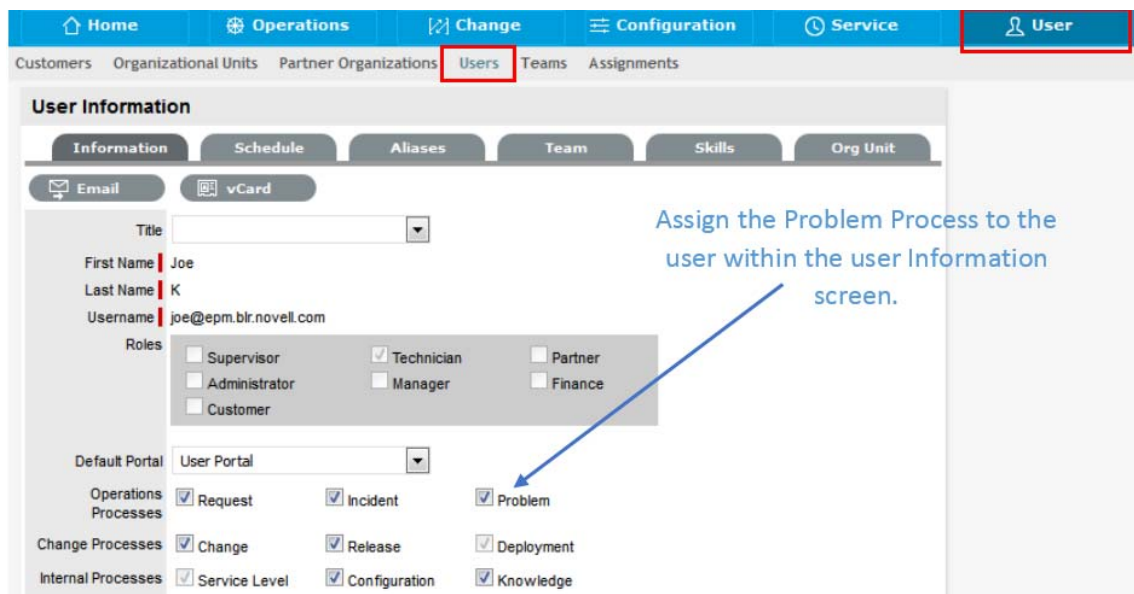
- ♦ *Problem*: Brand X Desktops no longer operating
- ♦ *Root Cause*: Faulty power-supply in July '09 models
- ♦ *Known Error*: Warranty - replace with new power-supply.

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.

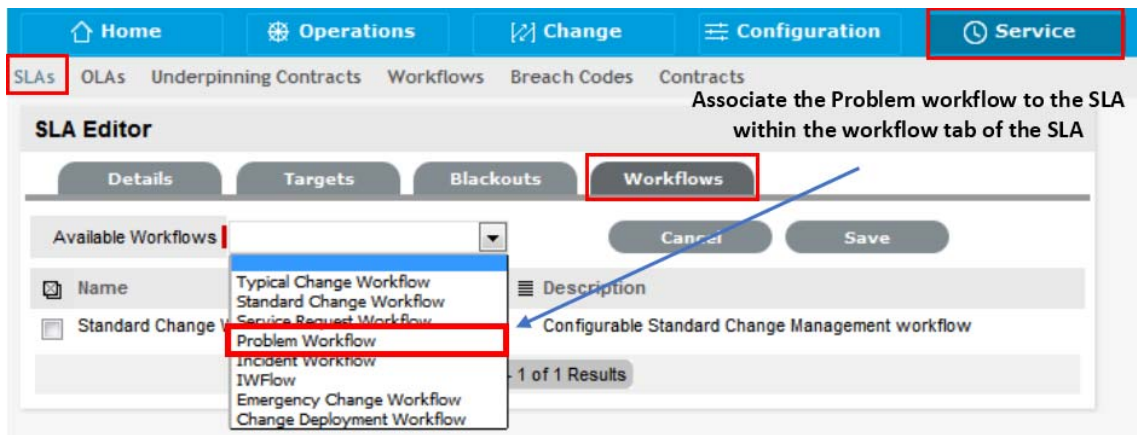
## Implementing Problem Management

To set up the Problem Management Process in the system, the following steps are to be completed:

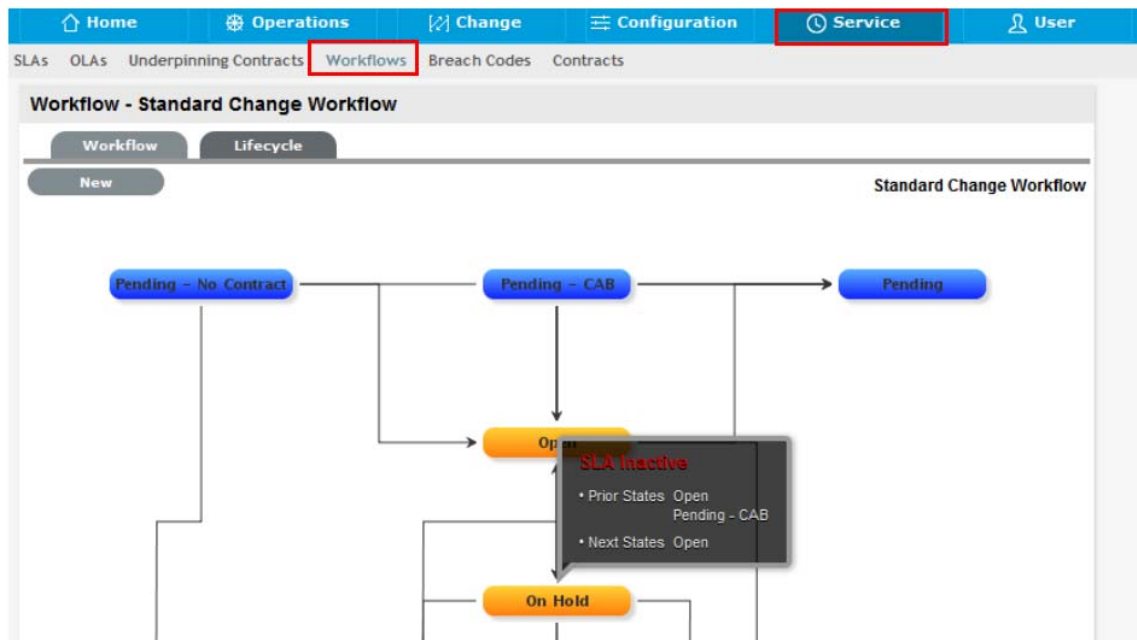
1. Assign the Problem Management Process to the relevant Users within the User Information screen under the User>Users tab. (See:[Create a User.](#))



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.)

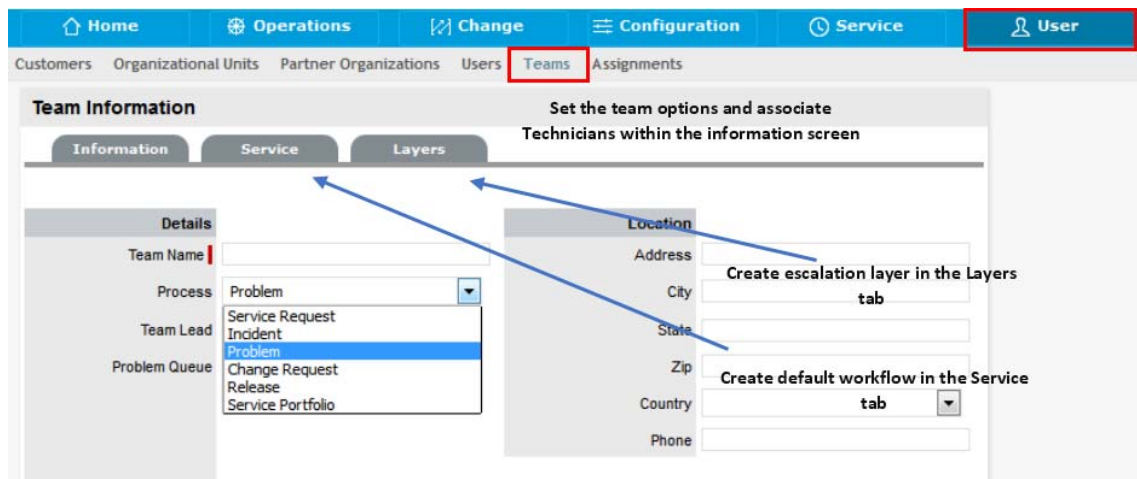


- Review the Problem Management Workflow within the Service>Workflows tab. (See: [Problem Management Workflow](#).)



- 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 382
- ◆ “Creating a Problem:” on page 383
- ◆ “Problem Queue” on page 383
- ◆ “Problem Search Tips:” on page 383
- ◆ “RSS Feeds” on page 383
- ◆ “Customer Tab” on page 384
- ◆ “Item Information” on page 385
- ◆ “Quick Calls” on page 387
- ◆ “Contract Tab” on page 388
- ◆ “Details Tab” on page 389
- ◆ “Analysis” on page 390
- ◆ “Summary Tab” on page 403
- ◆ “Notes Tab” on page 410
- ◆ “Attachments Tab” on page 414
- ◆ “Impact Tab” on page 415
- ◆ “Audit Tab” on page 419
- ◆ “Elements Tab” on page 421



The Problem tab defaults to display all Problems logged with the system. The other available List Filters include:

| <b>Filter</b>              | <b>Description</b>  |
|----------------------------|---|
| 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](#).

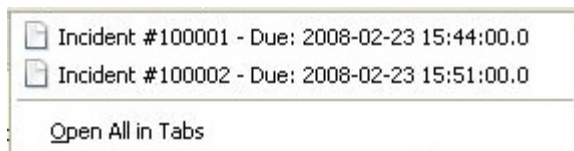
## Problem Search Tips:

- ◆ 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.

**Request Information**

Customer Details

Find Customer

First Name  Email

Last Name  Phone

Username  Org. Unit

Supported Org. Units Only

| Name                           | Phone | Org Unit                             |
|--------------------------------|-------|--------------------------------------|
| <a href="#">James Stewart</a>  |       | Micro Focus - Information Technology |
| <a href="#">Jason Blackett</a> |       | 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 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.

**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

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

| Item #                       | Item Type    | Identifier | Status    |
|------------------------------|--------------|------------|-----------|
| <a href="#">Service Desk</a> | Service Desk |            | Available |
| <a href="#">Wifi Service</a> | 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.

**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 387](#)

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

The screenshot shows the 'Request Information' dialog box with the 'Request' tab selected. The 'Request Type' dropdown is set to 'New Problem', and the 'Classification' dropdown is set to 'Investigate Issue'. The 'Description' field is empty, and the 'Path' field contains 'p'. The word count is 'Words:0'. The '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. 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 389
- ◆ “Request Subject” on page 390

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.

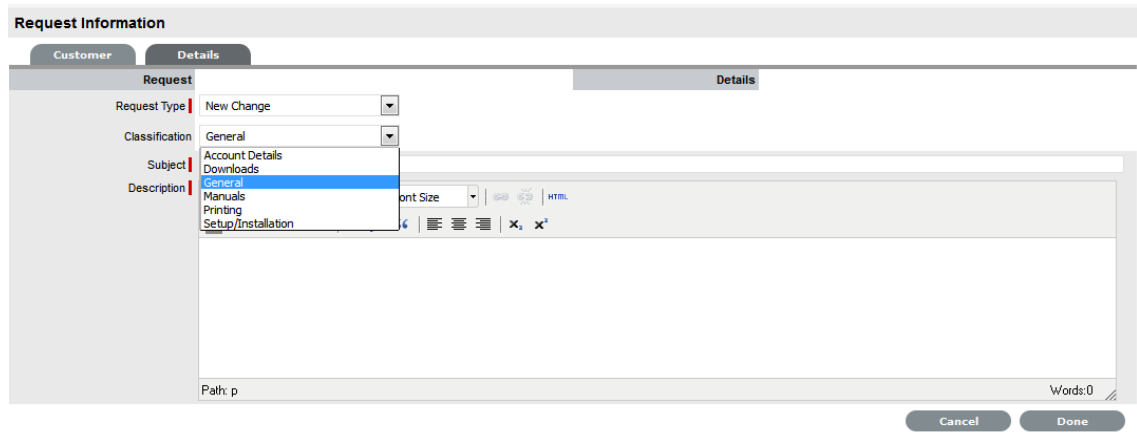
### Entering a Problem Description

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

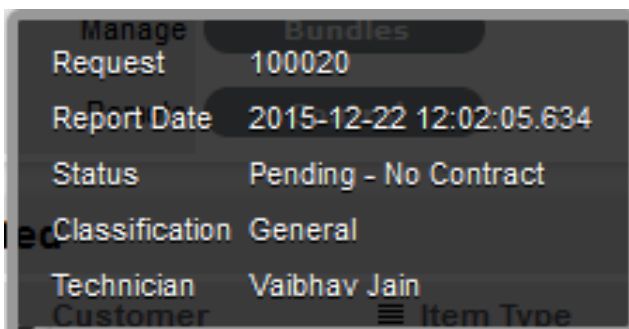


3. Complete any required customized fields
4. Define the Subject content, if desired
5. Enter all relevant information within the Description field  
This is a mandatory field.
6. Click Done to enter the new Problem into the database.

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.

**Problem Information**

Customer Contract **Analysis** Summary Notes \* [1] Attachments Impact

Audit Trail

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

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.

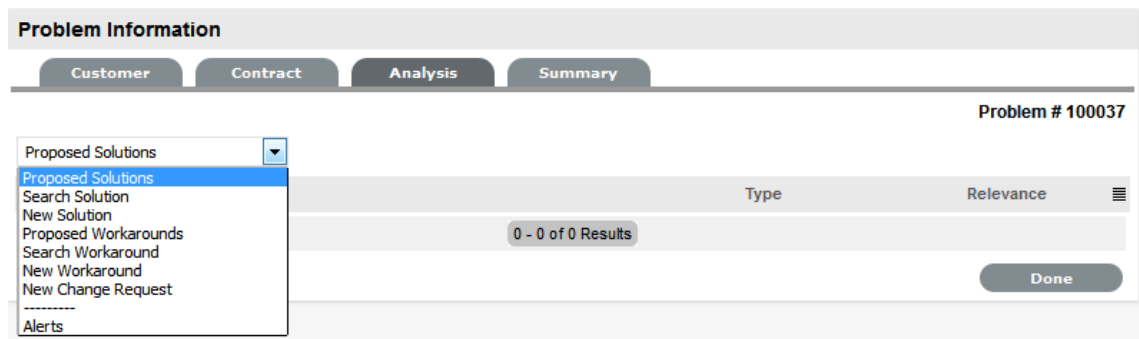
### *Problem Solutions*

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.<br><br>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"> <li>◆ Information – for general Alerts</li> <li>◆ Warning – to warn Users of potential issues</li> <li>◆ Urgent – to publish an urgent actionable message.</li> </ul> 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"> <li>◆ Specific Customer or User - In the Find User or Customer list, click search to select the recipient from the drop-down list.</li> <li>◆ User Role - An Alert sent to a User Role will go to all Users with that Role.</li> <li>◆ Personal Alert - A personal Alert appears on the User's own screen at the Publish date.</li> <li>◆ Organizational Units - In the Find Org. Unit field, search and select the recipients.</li> </ul> |
| 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.




| 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 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.

| 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

**Request** 100034

**Report Date** 2016-01-08 14:45:37.342

**Status** Pending

**Customer** Sachin Kumar

**Classification** Question

**Item Type** Website Services

**Technician** Vaibhav Jain

### **Bulk Updates**

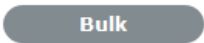
The Bulk option allows one or more related requests to have the following information updated simultaneously:

- ♦ 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



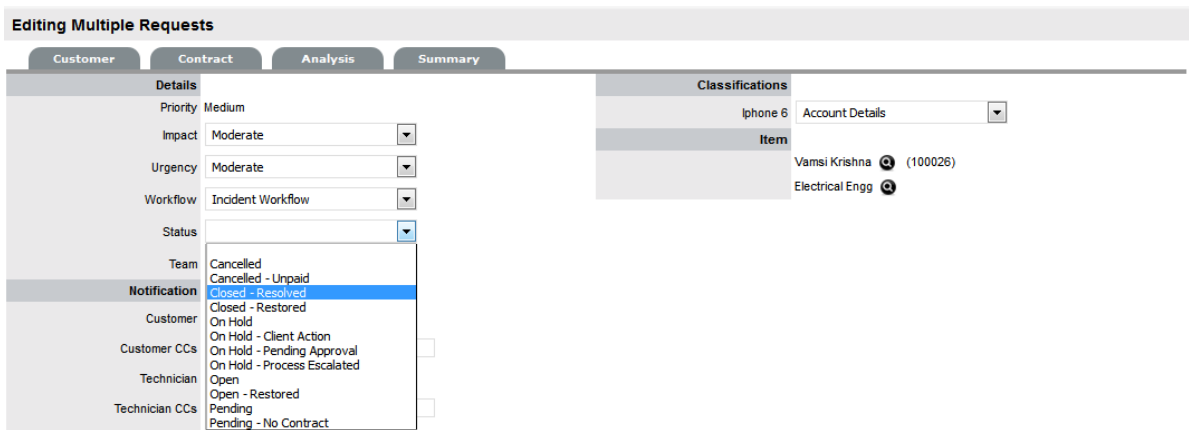
The Problem opens in Edit mode and checkboxes become available next to the requests in the Related sidebar.

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.   |

| Status    | Description   |
|-----------|---|
| 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.

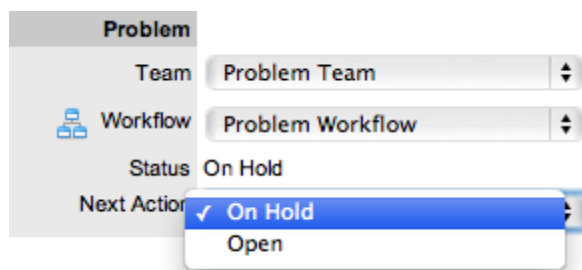
Any changes to the Status Type will be recorded in the Audit Trail tab.

### ***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:

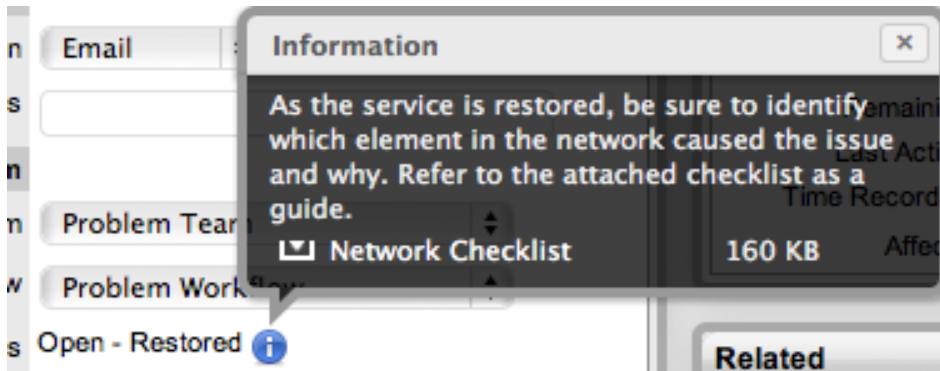
- ◆ Closing a Problem by adding a Note
- ◆ Escalating a Problem to a RFC
- ◆ When Billing is enabled and payment is not received.

### ***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 403](#)
- ♦ [“Changing a Problem's Customer or Item” on page 407](#)
- ♦ [“Item Relationship Map and Assignment” on page 408](#)
- ♦ [“Updating the Item associated with the Request” on page 409](#)

### **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  |
|----------------|--|
| <i>Details</i> | <p>The following details are displayed:</p> <ul style="list-style-type: none"> <li>◆ <b>Customer:</b> The customer assigned to the Problem. Click on the customer name link to view customer information. Scroll over the information icon  next to the <b>Customer</b> for quick information such as <b>Username</b>, <b>Org.Unit</b>, <b>Phone</b> and <b>Local Time</b>.</li> <li>◆ <b>Item:</b> An item assigned to the Problem. Select the <b>Item Number</b> link for more information about the Item. Scroll over the information icon  next to the <b>Item Number</b> to view Item information recorded on the <b>Details</b> tab.</li> </ul> <p>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.</p> <p>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.</p> <ul style="list-style-type: none"> <li>◆ <b>Type:</b></li> <li>◆ <b>Classification:</b> Displays the Problem Classification that was selected when the Problem was created. This can be updated, if required.</li> <li>◆ <b>Urgency:</b> Indicates if the Problem is to be taken up on priority.</li> <li>◆ <b>Impact:</b> 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.</li> <li>◆ <b>Priority:</b> Shows the priority of the Problem, which determines the Service Level triggers applied to the Problem.</li> </ul> <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 Problem 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"> <li>◆ <b>Escalation:</b> 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.</li> <li>◆ <b>Escalation Layer:</b> 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.</li> <li>◆ <b>Technician:</b> The name of the Technician assigned to the Problem.<br/>When a Problem is assigned to the Queue, the name applied in the Technician field is System User.</li> <li>◆ <b>Subject:</b> 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.</li> <li>◆ <b>Description:</b> 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.</li> </ul> |
| <i>Notification</i> | <p>The following details are displayed:</p> <ul style="list-style-type: none"> <li>◆ <b>Customer:</b></li> <li>◆ <b>Customer CCs:</b></li> <li>◆ <b>Technician:</b> 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.</li> <li>◆ <b>Technician CCs:</b> <i>Technician CCs</i> is a free text field for any additional notification recipients, these can be divided into Customer and Technician CC lists.</li> <li>◆ <b>Alternate Team:</b> Is visible if the Notify Alternate Team option is enabled in the <a href="#">Admin&gt;Email&gt;Setup</a> 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.</li> </ul>   |


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**Summary Tab    Description**

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**Problem**            The following details are displayed:

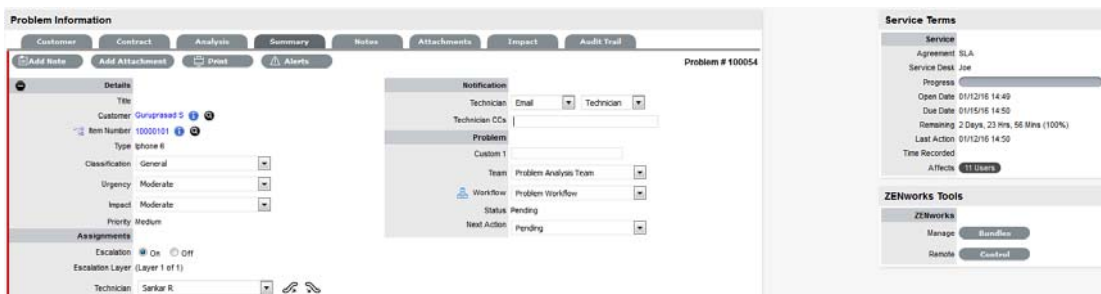
- ◆ **Team:** Displays the default support Team assigned to the Problem. This can be changed by selecting another option within the drop-down list. The Team list is derived from the Workflow and Workflow State.
- ◆ **Workflow:** Displays the default Workflow assigned to the Problem. This can be changed 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.



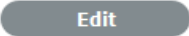
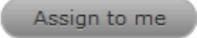
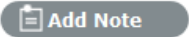


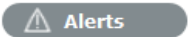

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**NOTE:** Only Technicians assigned to the Team can edit the Problem.

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### Summary Tab Buttons

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|   |   |
|---|---|
|  | 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

Apply

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.

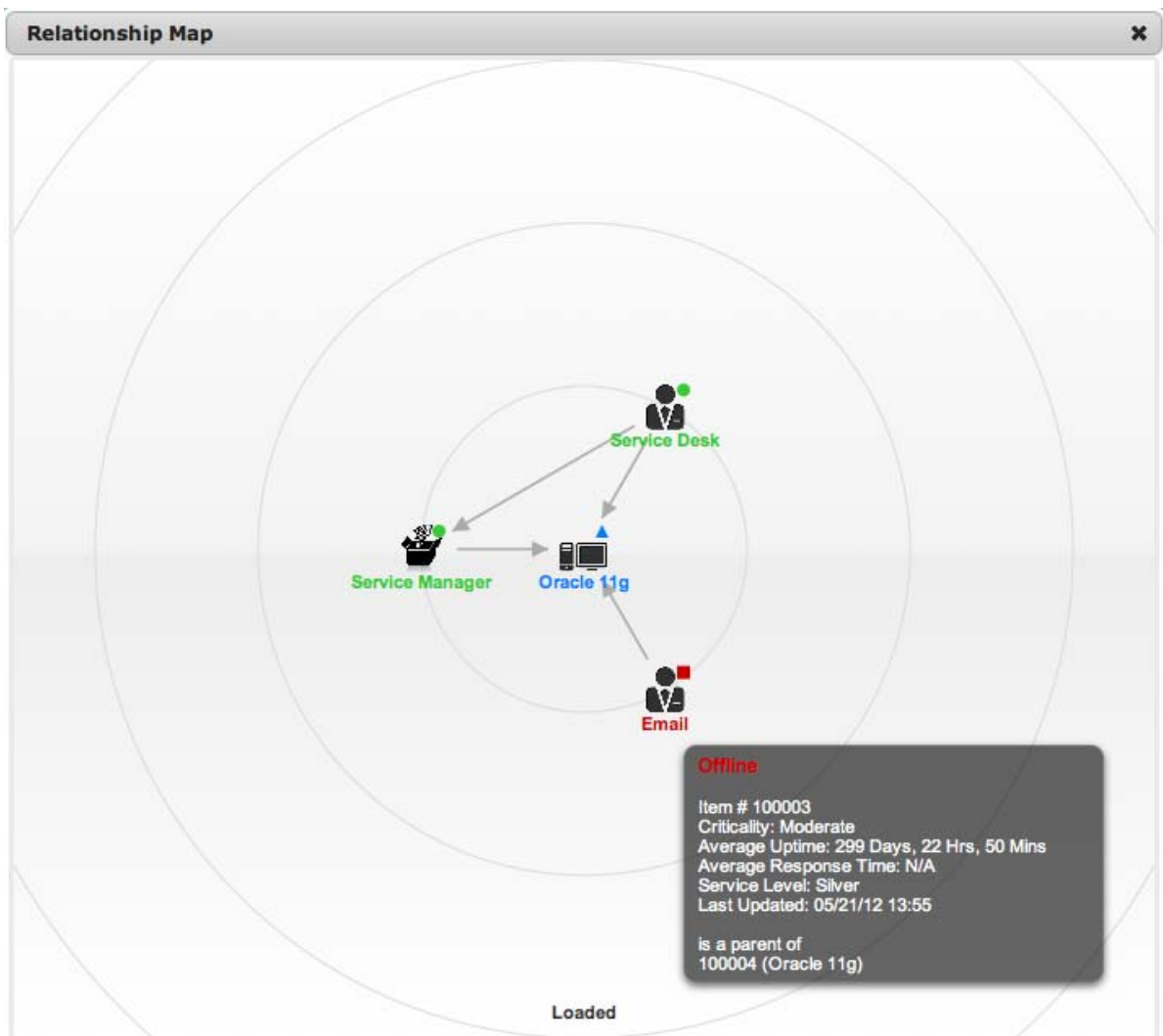
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**NOTE:** Technicians do not have the ability to delete Problems or Customers.

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### ***Item Relationship Map and Assignment***

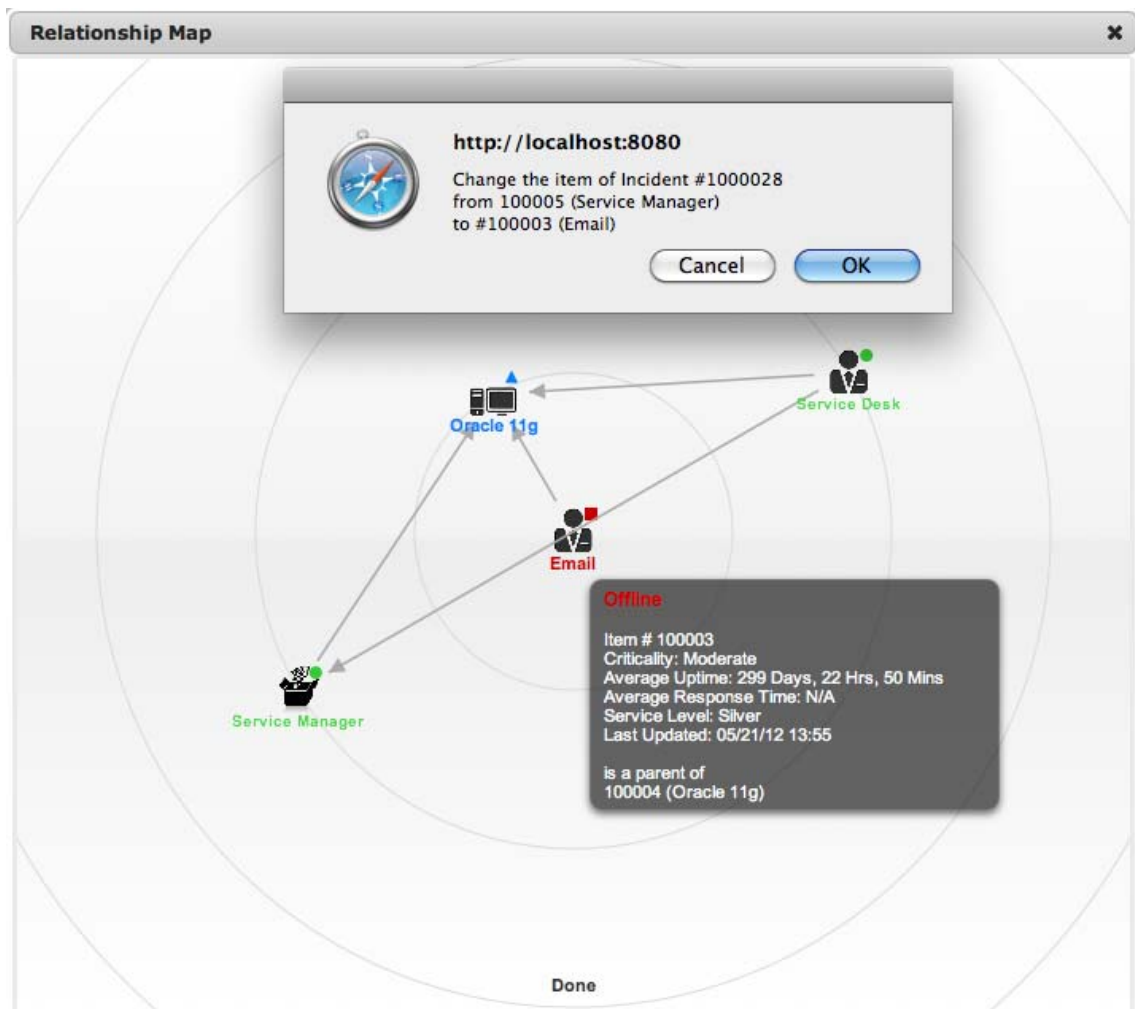
Selecting  opens a pop-up window that displays a map of Items that are related to the Request Item that can be navigated by clicking on the icons within the map. To view related Item information, scroll over the relevant Item icon.




### ***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 411
- ◆ “Adding a Note” on page 411
- ◆ “Draft Note” on page 412
- ◆ “Add Note” on page 412
- ◆ “Viewing All Notes” on page 412
- ◆ “Solution/Known Error” on page 412

- ◆ “Viewing a Note” on page 413
- ◆ “Adding Notes to Grouped Problems” on page 413

## 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 .

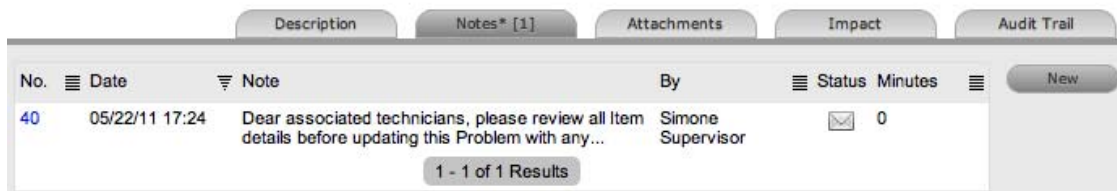
The Note editor screen will close.



### Draft Note



Use the Draft button to save an incomplete Note entry, which will be displayed in the Notes list.

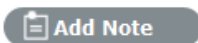
When a Note is saved as a draft, the Status will be displayed as . If the Add Note button is selected when a draft Note has been recorded against a request, a warning will be displayed. To continue working on a draft Note, open the request in Edit mode and select the Note No. hyperlink.



| No. | Date           | Note   | By                | Status  | Minutes |   |
|-----|----------------|--|-------------------|---|---------|---|
| 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



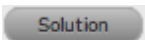
The Add Note button can be used to open the Problem in Edit mode and automatically access a new Note window, as shown in Step 4 below.

### 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:

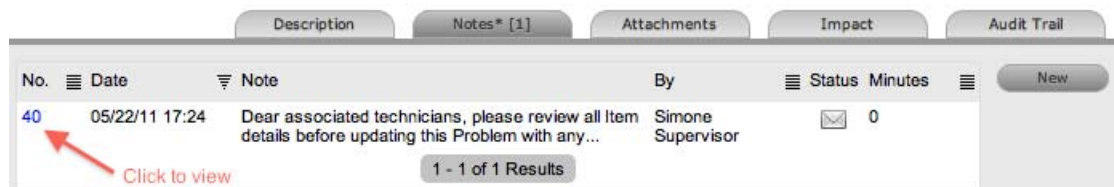
1. Enter the Note details
2. Select Create Knowledge, if the Note content is to be available in the Knowledge Base
3. Click Solution.

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 414](#)
- ◆ [“Adding an Attachment” on page 414](#)
- ◆ [“Deleting an Attachment” on page 415](#)

### 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"/> <a href="#">Penguins.jpg</a> | 760 KB | 01/12/16 15:14 |       |
| <input type="checkbox"/> <a href="#">Desert.jpg</a>   | 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 415](#)
- ◆ [“Service Targets” on page 416](#)
- ◆ [“Service Level Breaches” on page 416](#)
- ◆ [“Services Affected” on page 417](#)
- ◆ [“Estimates” on page 417](#)
- ◆ [“Contract Monitor” on page 418](#)

### ***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:

---

| <b>Options</b>         | <b>Description</b>  |
|------------------------|---|
| 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. |

---

| Options   | Description   |
|-----------|---|
| 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' tab with a sub-tab for 'Service Targets'. The table below represents the data shown in the screenshot:

| 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

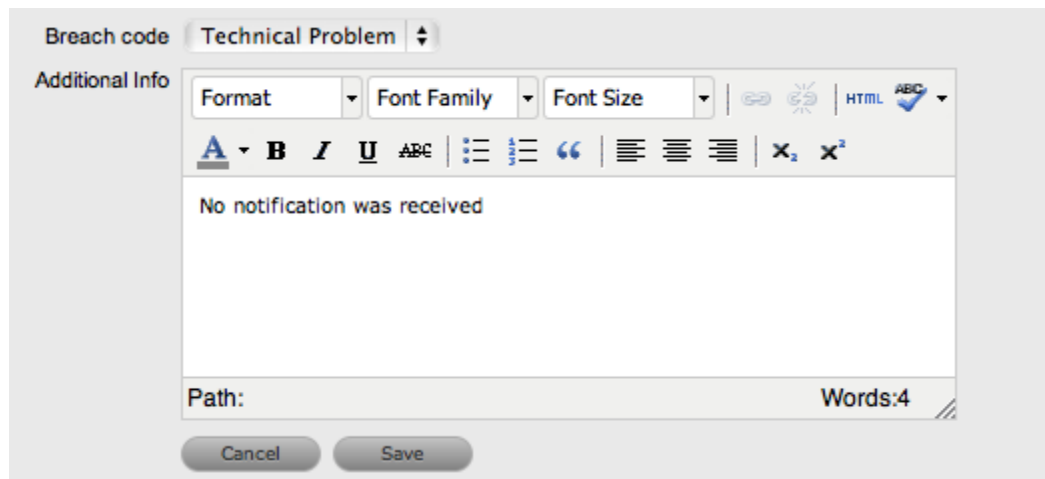
When a Problem Service Level Agreement is violated, a service level breach is recorded against the Problem. The User assigned to the request will be notified and asked to provide a reason for the breach and assign a breach code.

The screenshot shows the 'Service Level Breaches' tab with the following details:

|                        |  |
|------------------------|--|
| 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.

| <b>Options</b> | <b>Description</b>  |
|----------------|---|
| 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 'Contract Monitor'. It is divided into two main sections: 'Details' and 'Milestones'.  
**Details Section:**  
 - Underpinning Contract: Canton Services  
 - Start Time: 05/11/11 21:21  
**Milestones Section:**  
 - Expected Response Time: 05/12/11 21:21 (with a red bar at the end 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 text 'Check when the Service Provider meets the Restoration or ResolutionTime')  
 - Comments: A large empty text box 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.

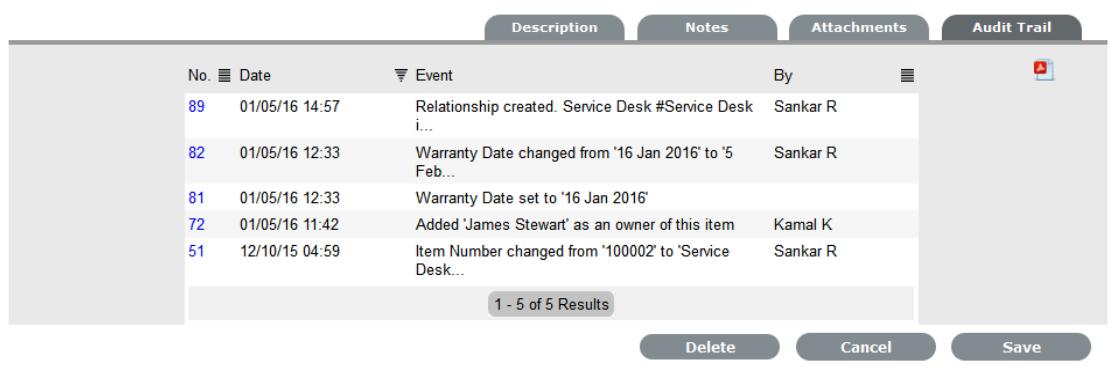
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## Audit Tab

- ◆ “Audit” on page 419
- ◆ “Audit Trail” on page 419
- ◆ “Resource Utilization” on page 419
- ◆ “Item Audit Trail” on page 420
- ◆ “Service Terms” on page 420
- ◆ “Time Recorded” on page 421

## 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

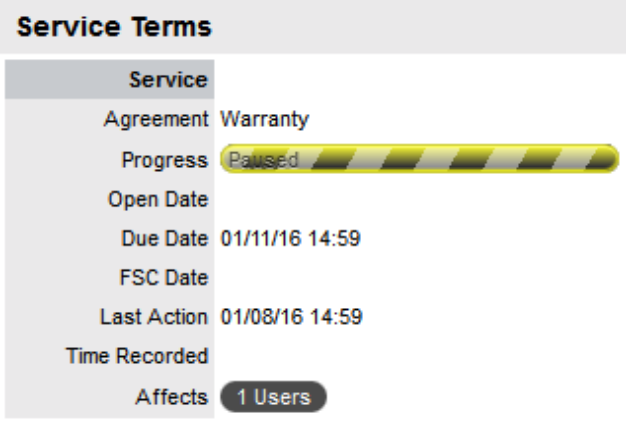
The Resource Utilization option displays a breakdown of the time a Problem was worked on at each level of support. It details the User's name, the escalation layer they belong to, and the amount of time they have spent on the Problem.

### 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.



The screenshot shows a sidebar titled "Service Terms" with the following fields:





- Service Agreement:** Warranty
- Progress:** Paused (indicated by a yellow and black striped progress bar)
- Open Date:** (empty)
- Due Date:** 01/11/16 14:59
- FSC Date:** (empty)
- Last Action:** 01/08/16 14:59
- Time Recorded:** (empty)
- Affects:** 1 Users (indicated by a dark grey pill button)

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       | Displays the Service Level Agreement assigned to the Problem. The service level is derived from either the Customer, Organizational Unit or Item.<br><br>When Contracts are not enabled, the Agreement field can be edited, when the Problem is in edit mode.   |
| Service Manager | Displays the User assigned as the Service Manager for the assigned SLA.   |
| Progress        | 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:<br><br> - Workflow is in an SLA paused State. Triggers will not fire.<br><br> - Workflow is in an SLA timers on State. Triggers will fire.<br><br> - Workflow is in an Exit State and the SLA has been successfully maintained.<br><br> - Assigned SLA has been breached and Workflow is in an Exit State. |
| Open Date       | The Open Date field is automatically populated when the Problem is created.   |

---



---

## Service Terms

---

|                  |  |
|------------------|--|
| Due Date         | 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.   |
| Fix Date         | Auto-filled when the Problem 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 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

**Problem Group - Problem #100054**

Details Analysis Elements

Remove Export: Current Page Display: 25

| Request # | IP | Created        | Status  | Priority | Item Type | Technician | Team                  | Customer     | Group           | Subject |
|-----------|----|----------------|---------|----------|-----------|------------|-----------------------|--------------|-----------------|---------|
|           |    | 01/12/16 14:49 | Pending | Medium   | Iphone 6  | Sankar R   | Problem Analysis Team | Guruprasad S | Problem #100054 | A       |

1 - 1 of 1 Results

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.

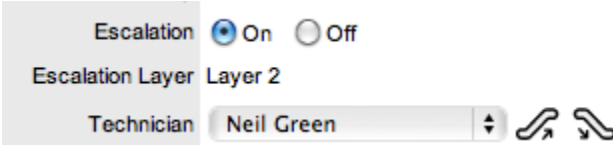
## Automated Escalation

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:

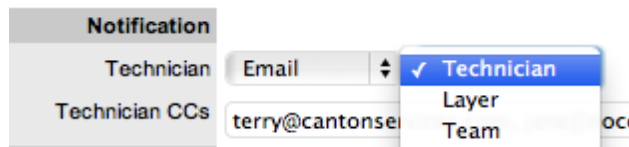
- ◆ Problem created

- ◆ 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

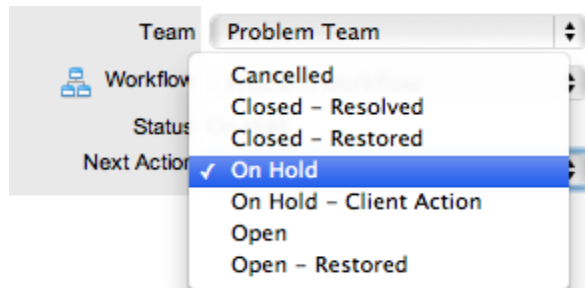
To move a Problem through the stages of the Workflow, in the Summary tab of the Problem Information screen:

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 Analysis Summary

Print Problem # 100031

|                |   |                     |  |
|----------------|---|---------------------|--|
| <b>Contact</b> | Customer: Amber Wallan                                | <b>Notification</b> | Technician: Email Technician               |
|                | Org Unit: MyCompany - White                           |                     | Technician CCs:                            |
|                | Phone: 03 9797 999                                    | <b>Problem</b>      | Team: Problem Team                         |
|                | Local Time: Mon, 26 Mar 2012 16:36:51                 |                     | Workflow: Problem Workflow                 |
|                | GPS:  |                     | Status: Open                               |
| <b>Item</b>    | Type: Email Service                                   |                     | Next Action: <b>Outsourced</b>             |
|                | Number: 100003  |                     | Underpinning Contract: Service Contractors |
|                | Status: Available                                     |                     | Status Due: 03/29/12 16:35                 |
|                | Criticality: Moderate                                 |                     |  |
| <b>Details</b> |   |                     |  |
|                | Classification: Question                              |                     |  |
|                | Urgency: Moderate                                     |                     |  |
|                | Impact: Moderate                                      |                     |  |
|                | Priority: Medium                                      |                     |  |
|                | Escalation Layer: (Layer 1 of 2)                      |                     |  |
|                | Technician: Simone Supervisor (Service Level Manager) |                     |  |

*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.

|                |                                |
|----------------|--------------------------------|
| <b>Problem</b> |                                |
| Team           | Problem Team                   |
| Workflow       | Problem Workflow               |
| Status         | Investigating                  |
| OLA            | Problem OLA                    |
| Status Due     | 03/29/12 16:52 (75% Remaining) |

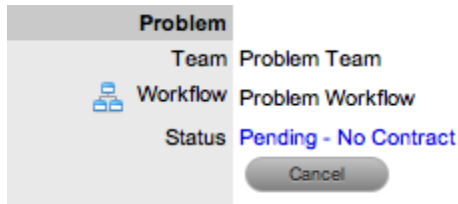
## Team Assignment during the Workflow Lifecycle

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.



### Information

The Article was created successfully. Group Type changed to Known Error  
Group Status changed to Closed - Resolved

## Viewing a Known Error

Errors are used to identify known Problems. An Error can be used to close a Problem, or groups of Problems.

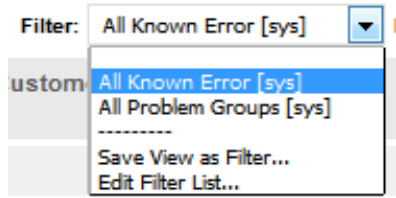
To view Known Errors:

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                             | 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.<br><br><b>NOTE:</b> The match is only performed on the first 250 characters of the Description. |

| Unassigned Requests              | 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

| 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 432](#)
- [Section 2.5.2, “Change Groups,” on page 485](#)
- [Section 2.5.3, “Grouping Change Requests,” on page 499](#)

- ◆ [Section 2.5.4, “Grouping Requests,” on page 500](#)
- ◆ [Section 2.5.5, “Related Requests,” on page 503](#)
- ◆ [Section 2.5.6, “Releases,” on page 503](#)
- ◆ [Section 2.5.7, “Deployments,” on page 539](#)
- ◆ [Section 2.5.8, “Deployment Tasks,” on page 545](#)

## 2.5.1 Change Management

- ◆ [“Implementing Change Management” on page 432](#)
- ◆ [“Change Requests \(RFCs\)” on page 434](#)

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.

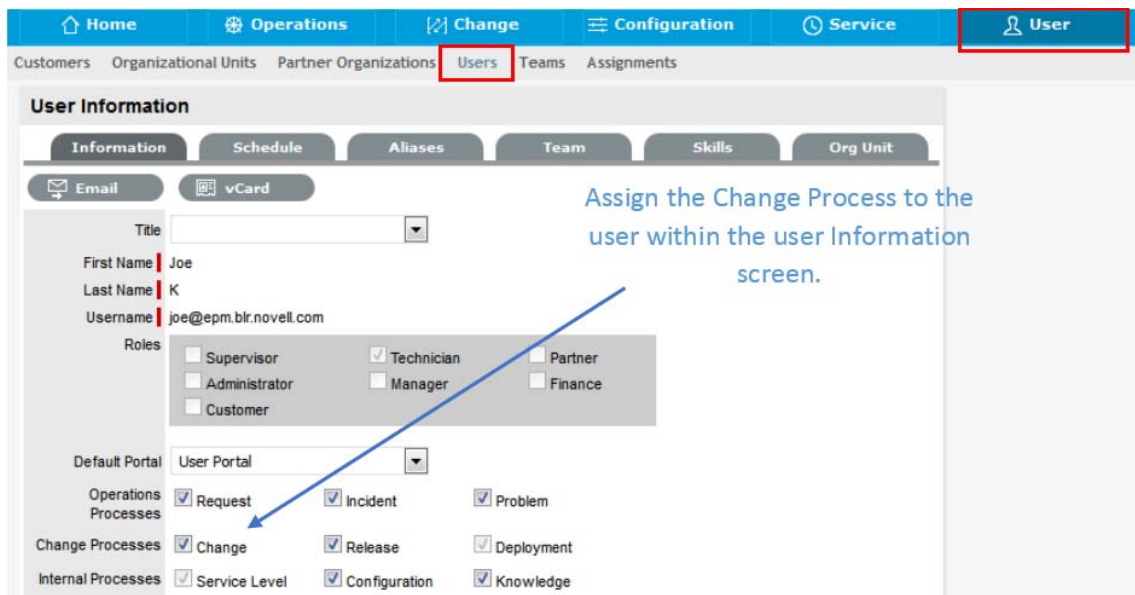
When the RFC has progressed through all of the required Workflow States, a change review is undertaken to verify that the RFC has achieved its objectives. If the change objectives are not met, the RFC’s associated back-out procedure is implemented to rollback the change and restore the CMDB to a valid 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.

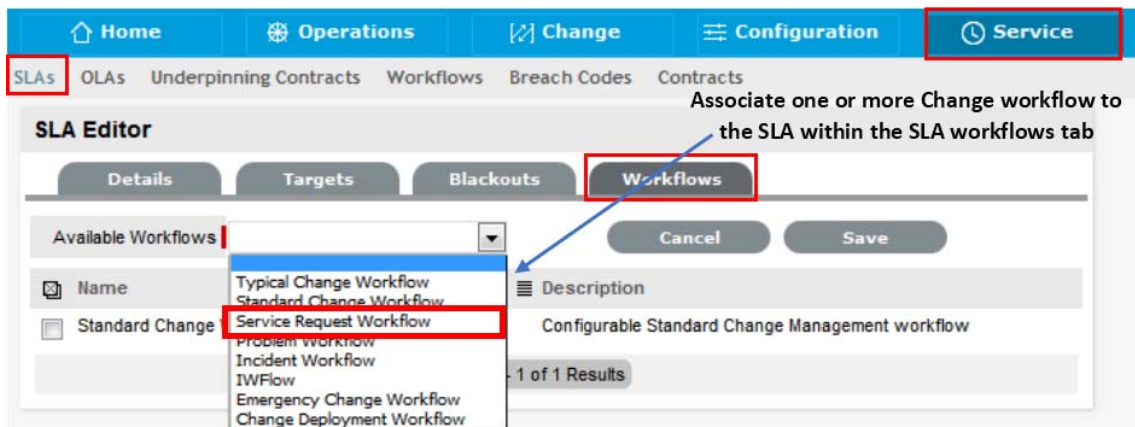
### Implementing Change Management

To set up the Change Management Process in the system, the following steps are to be completed:

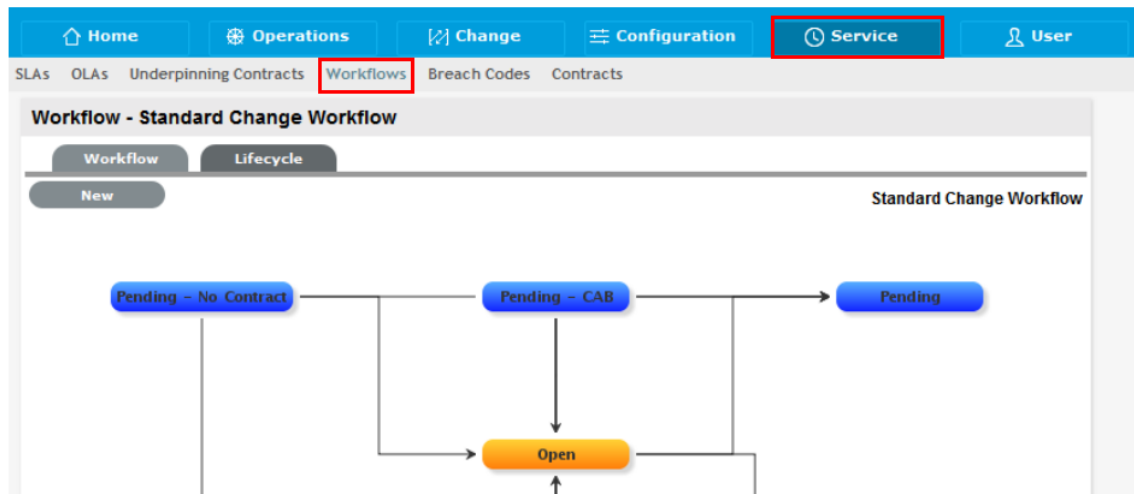
1. Assign the Change Process to the relevant Users within the User Information screen under the User>Users tab.



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.

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 436
- ◆ “Customer Tab” on page 437
- ◆ “Quick Calls” on page 438
- ◆ “Item Information” on page 440
- ◆ “Contract Tab” on page 442
- ◆ “Details Tab” on page 443
- ◆ “Analysis” on page 444
- ◆ “Summary Tab” on page 448

- ◆ “Notes Tab” on page 457
- ◆ “Attachments Tab” on page 462
- ◆ “Impact Tab” on page 463
- ◆ “Audit Tab” on page 468
- ◆ “Related Requests” on page 472
- ◆ “Closing Requests within Groups” on page 474
- ◆ “Status” on page 474
- ◆ “Updating a Request's Workflow and Status” on page 475
- ◆ “Requests with a Pending-No Contract Status” on page 475
- ◆ “Viewing a Status Note” on page 476
- ◆ “Request Reminders” on page 476
- ◆ “SLA Triggers and Request Status” on page 476
- ◆ “Priority” on page 477
- ◆ “Setting RFC Priority” on page 477
- ◆ “RFC Assignment and Escalation” on page 478
- ◆ “RFC Assignment” on page 478
- ◆ “Automated Escalation” on page 479
- ◆ “Manual Escalation” on page 479
- ◆ “Escalation Control” on page 479
- ◆ “Notification” on page 479
- ◆ “Workflow” on page 481
- ◆ “Moving through the Workflow” on page 481
- ◆ “Approval State” on page 482
- ◆ “Assigning a State with an Underpinning Contract” on page 482
- ◆ “OLA Status Due” on page 483
- ◆ “Team Assignment during the Workflow Lifecycle” on page 483
- ◆ “Pending - No Contract Status” on page 484



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:***

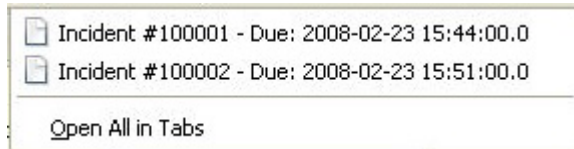
- ♦ The Change Request search option has a default Status to search only Active Requests. To ensure search success, select the relevant Incident Status, if unsure, select All
- ♦ To search for multiple RFC numbers at once, insert a comma separator between ID numbers
- ♦ To search based on an RFC status, 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

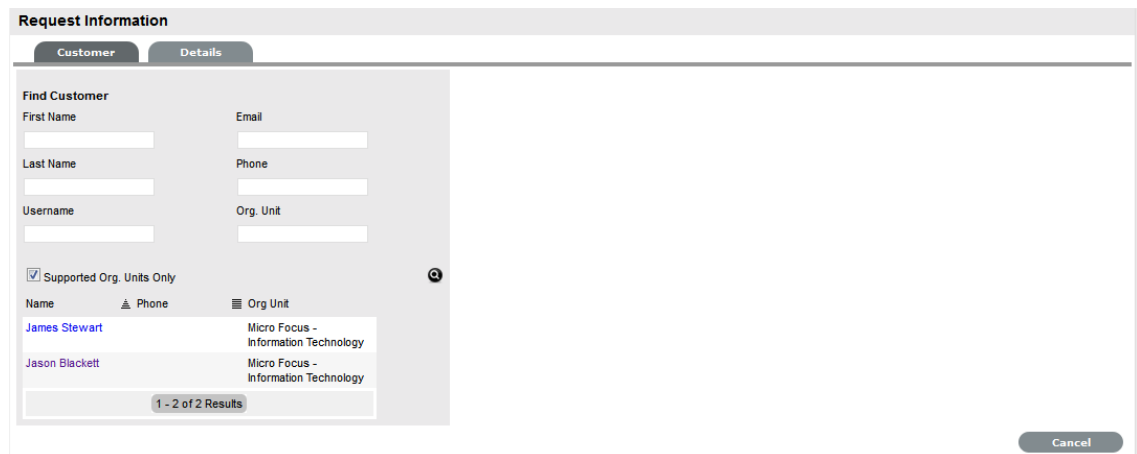
The first step in creating a new RFC requires that a Customer be assigned to the request. There are two ways to assign a Customer to an RFC, either search and select an existing Customer or create a new one.


### 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.



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.

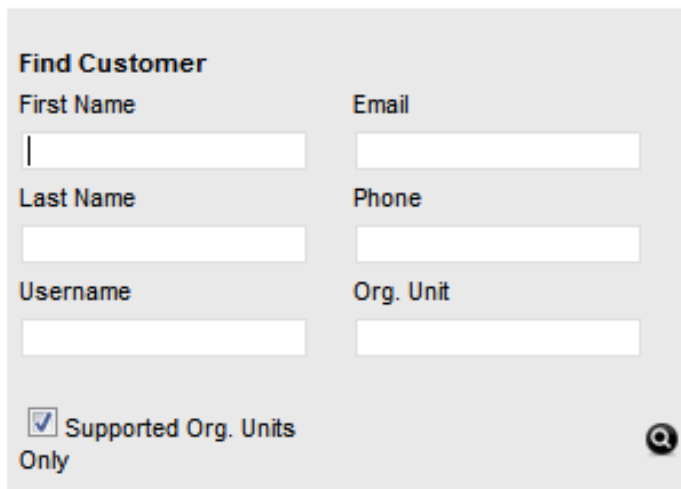
### **Create an RFC for a new Customer**

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.

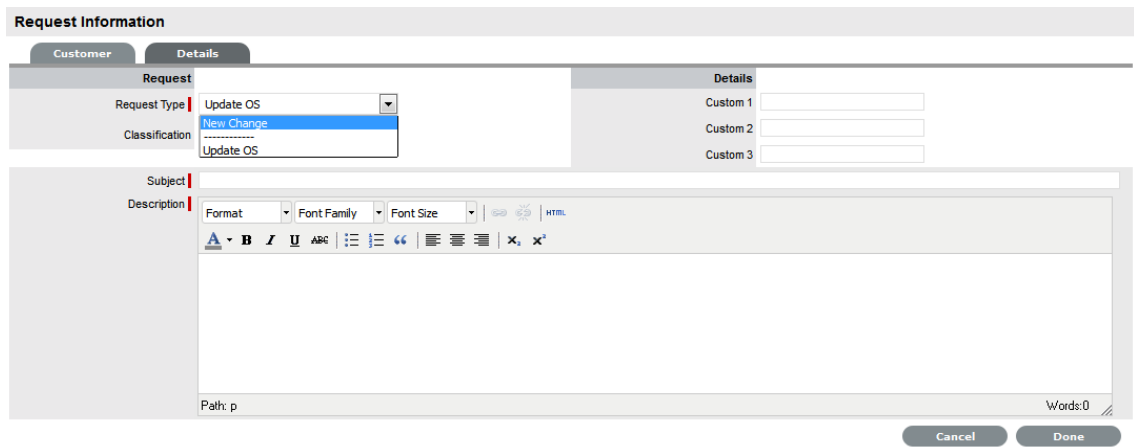
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If a specific Item is associated with the Quick Call Request within the Customer tab, the options displayed within the Request Type drop-down list will include Quick Call templates associated with the Item Type already assigned to the Request, and 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' dialog box with the 'Details' tab selected. The 'Request' section contains a 'Request Type' dropdown menu with 'Update OS' selected, and a 'Classification' dropdown menu with 'New Change' selected. The 'Details' section contains three input fields labeled 'Custom 1', 'Custom 2', and 'Custom 3'. The 'Description' section contains a rich text editor with a toolbar and a 'Path' field. The 'Path' field contains the text 'p'. The 'Words' counter shows 'Words:0'. The '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
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, organizational unit (Micro Focus - Information Technology), email (james@nsd.com), and various contact information fields. On the right, the 'Find Item' search panel is visible. It includes input 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 pairs for 'Memory Card' and 'IMEI Number'. At the bottom, a table lists 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.

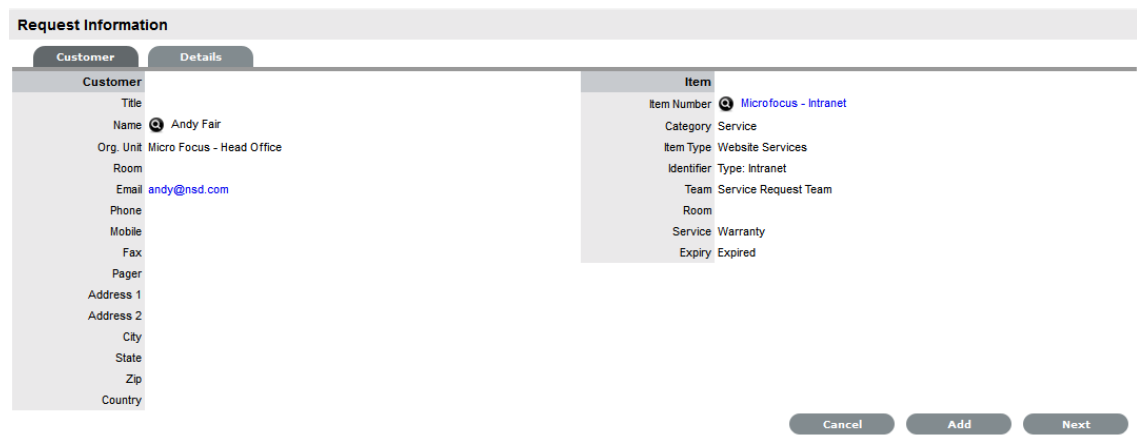
## RFC Item Assignment

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 the 'Request Information' form 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, displaying 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 of the form, there 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.

| Selections                    |              |              |
|-------------------------------|--------------|--------------|
| Customer                      | Item No.     | Item Type    |
| <a href="#">James Stewart</a> | Wifi Service | WIFI Service |

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.

| Change Request Information |                          |               |                  |                 |                |        |             |
|----------------------------|--------------------------|---------------|------------------|-----------------|----------------|--------|-------------|
| Customer                   | Contract                 | Analysis      | Summary          | Notes           | Attachments    | Impact | Audit Trail |
| <b>Contract</b>            |                          |               |                  |                 |                |        |             |
| 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                    | <input type="checkbox"/> |               |                  |                 |                |        |             |
| 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   |             |

Done

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.

| Change Request |   |
|----------------|---|
| Team           | Change Management Team  |
| Workflow       | Standard Change Workflow  |
| Status         | Pending - No Contract   |
|                | <input type="button" value="Open"/> <input type="button" value="Cancel"/> |

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.

The screenshot shows the 'Request Information' window with the 'Details' tab selected. The 'Request' section contains the following fields:

- Request Type:** New Change (dropdown)
- Classification:** General (dropdown)
- Subject:** Account Details Downloads
- Description:** General (dropdown menu is open, showing options: General, Manuals, Printing, Setup/Installation)

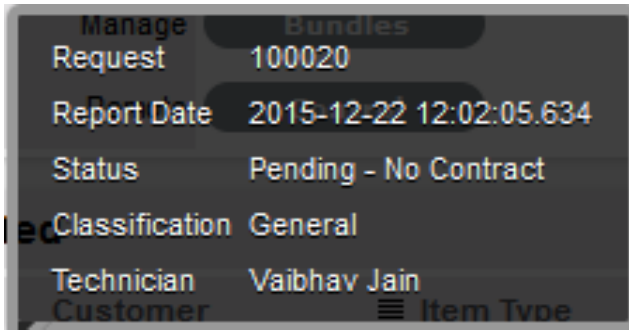
Below the Description field is a rich text editor with a font size dropdown and a toolbar. The word count is 0. At the bottom right, there are 'Cancel' and 'Done' buttons.

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. |

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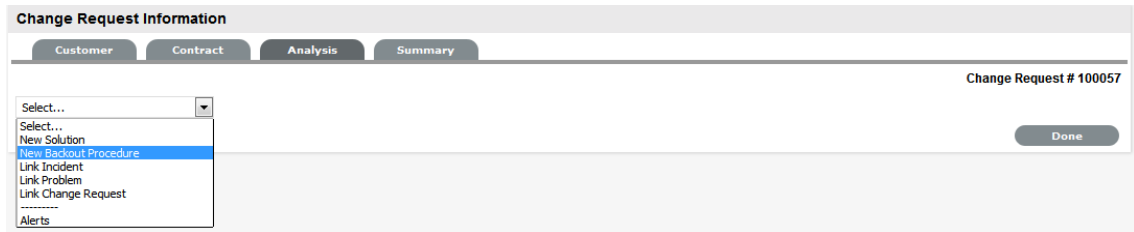


### ***Creating a Backout Procedure***

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.

**Change Request Information**

Customer Contract **Analysis** Summary

Edit Change Request # 100090

**Flags** Back out Procedure #: 40

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.

Created 05/03/12 12:16  
Revised 05/03/12 12:17  
Direct Link <http://localhost:8080/LiveTime/WebObjects/LiveTime.woa/wa/LookupArticle?articleId=40>

**Statistics** Views:0 Last: Votes: Rating:

Attachments History

### **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 with Requests

---

|                     |   |
|---------------------|---|
| 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.<br><br>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"> <li>◆ Information – for general Alerts</li> <li>◆ Warning – to warn Users of potential issues</li> <li>◆ Urgent – to publish an urgent actionable message.</li> </ul> <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"> <li>◆ Specific Customer or User</li> <li>◆ User Role</li> <li>◆ Personal Alert</li> <li>◆ Organizational Units.</li> </ul> <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 449](#)
- ◆ [“Changing an RFC's Item or Customer” on page 454](#)
- ◆ [“Item Relationship Map and Assignment” on page 455](#)
- ◆ [“Updating the Item associated with the Request” on page 456](#)

## **Summary**

The Summary tab provides comprehensive details related to an RFC and gives access to the tabs required to work on the RFC.






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**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  |
|----------------|--|
| <i>Details</i> | <p>The following details are displayed:</p> <ul style="list-style-type: none"> <li>◆ <b>Customer:</b> The customer assigned to the RFC. Click on the customer name link to view customer information. Scroll over the information icon  next to the <b>Customer</b> for quick information such as <b>Username</b>, <b>Org.Unit</b>, <b>Phone</b> and <b>Local Time</b>.</li> <li>◆ <b>Item:</b> An item assigned to the RFC. Select the <b>Item Number</b> link for more information about the Item. Scroll over the information icon  next to the <b>Item Number</b> to view Item information recorded on the <b>Details</b> tab. <ul style="list-style-type: none"> <li> 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.</li> </ul> <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> </li> <li>◆ <b>Type:</b> <ul style="list-style-type: none"> <li> 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.</li> </ul> </li> <li>◆ <b>Classification:</b> Displays the RFC Classification that was selected when the Change Request was created. This can be updated, if required.</li> <li>◆ <b>Urgency:</b></li> <li>◆ <b>Impact:</b></li> <li>◆ <b>Priority:</b> Shows the Priority of the RFC, 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 Change Request to alter the Priority assigned.</p> </li> </ul> |

| Summary Tab         | Description  |
|---------------------|--|
| <i>Assignments</i>  | <p>The following details are displayed:</p> <ul style="list-style-type: none"> <li>◆ <b>Escalation:</b> 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.</li> <li>◆ <b>Escalation Layer:</b> 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.</li> <li>◆ <b>Technician:</b> The name of the Technician assigned to the RFC.</li> <li>◆ <b>Subject:</b></li> <li>◆ <b>Description:</b></li> </ul>   |
| <i>Notification</i> | <p>The following details are displayed:</p> <ul style="list-style-type: none"> <li>◆ <b>Customer:</b> 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.</li> <li>◆ <b>Customer CCs:</b> <i>Customer CCs</i> is a free text field for any additional notification recipients, these can be divided into Customer and Technician CC lists.</li> <li>◆ <b>Technician:</b> 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.</li> <li>◆ <b>Technician CCs:</b> <i>Technician CCs</i> is a free text field for any additional notification recipients, these can be divided into Customer and Technician CC lists.</li> <li>◆ <b>Alternate Team:</b> Is visible if the Notify Alternate Team option is enabled in the Admin&gt;Email&gt;Setup tab. This allows the User to define another Team to be notified about updates regarding the RFC.</li> </ul> |

| Summary Tab           | Description   |
|-----------------------|---|
| <i>Change Request</i> | <p>The following details are displayed:</p> <ul style="list-style-type: none"> <li>◆ <b>Team:</b> 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.</li> <li>◆ <b>Workflow:</b> 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.</li> </ul> <p>Select  to view the Workflow in its entirety.</p> <ul style="list-style-type: none"> <li>◆ <b>Status:</b> Shows the current Workflow State of the RFC.</li> <li>◆ <b>Next Action:</b> 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.</li> </ul> <p>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.</p> <ul style="list-style-type: none"> <li>◆ <b>Status Due:</b> Details the expiry time for the current Workflow State if the State has an OLA assigned.</li> </ul> |



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## Summary Tab Description

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**Service Terms** 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:
  - ◆ **Paused** - Workflow is in an SLA paused state. Triggers will not fire.
  - ◆ **26%** - Workflow is in an SLA timers on state. Triggers will fire.
  - ◆ **Success** - Workflow is in an Exit state and the SLA has been successfully maintained.
  - ◆ **Failed** - 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.

The screenshot displays the 'Change Request Information' interface for Change Request # 100000. It features several tabs: Customer, Contract, Analysis, Summary, Notes, Attachments, Impact, and Audit Trail. The 'Summary' tab is active, showing a 'Details' section with fields for Title (Sachin Kumar), Item Number (10000101), Type (iPhone 6), Classification (Account Details), Urgency (Moderate), Impact (Moderate), and Priority (Medium). The 'Assignments' section shows Escalation (On), Escalation Layer (Default Group), and Technician (Ingo Engels). A 'Notification' section includes dropdowns for Customer (Email), Customer CCM, Technician (Email), and Technician CCM. The 'Change Request' section shows Team (Change Management Team), Workflow (Standard Change Workflow), Status (Pending - CAB), and Next Action (Pending - CAB). On the right, the 'Service Terms' section displays Agreement SLA, Service Desk (Joe), Progress (0%), Queue Date, Due Date (01/15/16 16:59), FSC Date, Last Action (01/12/16 16:59), Time Recorded, and Affects (11 Users). Below this is the 'ZENworks Tools' section with Manage (Bundled), Remote, and Control buttons, and a 'Related' section.

---

**NOTE:** Only Technicians assigned to the Workflow Group associated with the RFC can edit the Change Request.

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## Summary Tab Buttons

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**Edit**

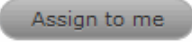
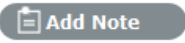
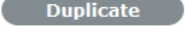
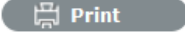



Edit opens the Request in edit mode. This allows the Request details to be amended, Notes to be added and time is automatically recorded against the Request whilst in edit mode.

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---

## Summary Tab Buttons

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|   |   |
|---|---|
|  | 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

Apply

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.

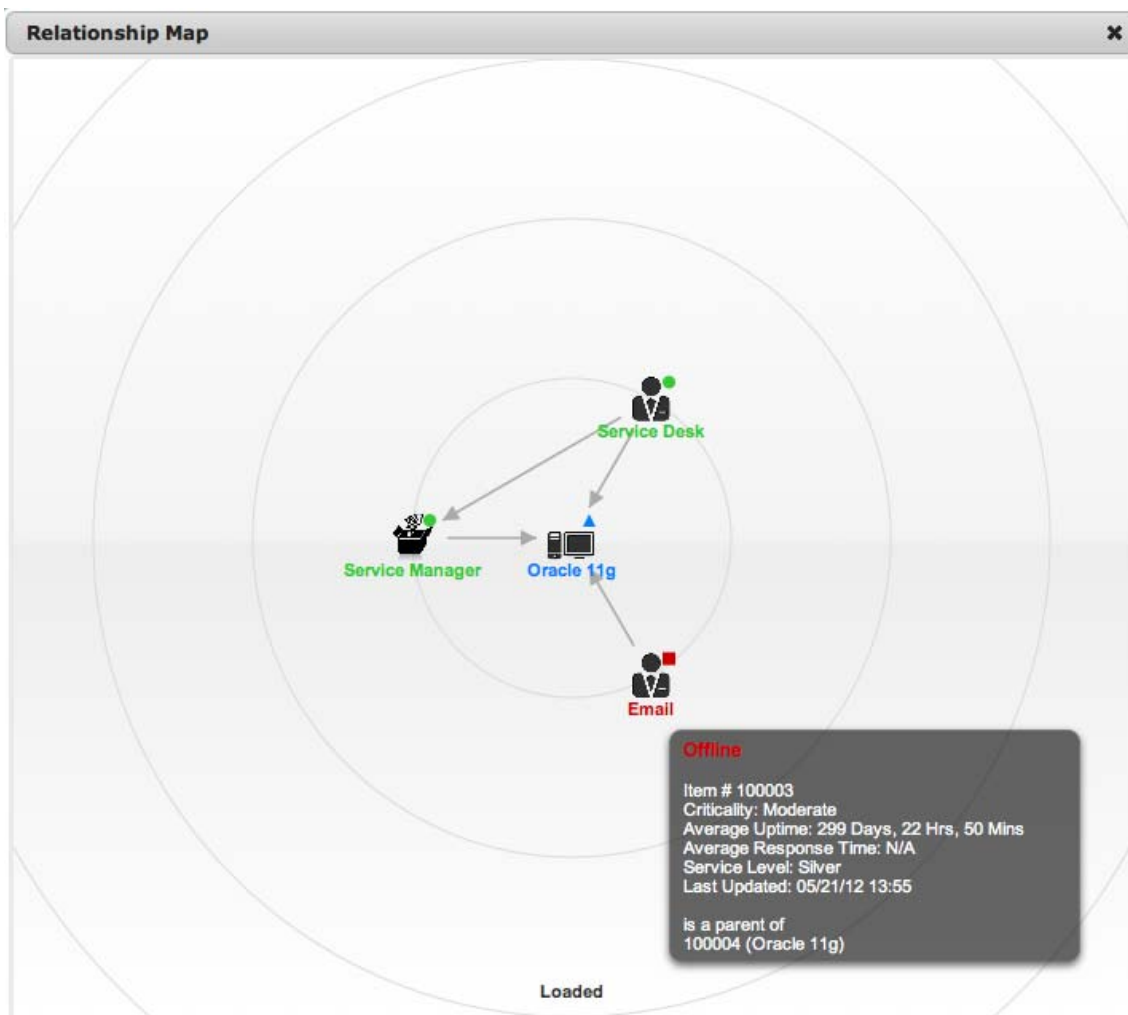
---

**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.

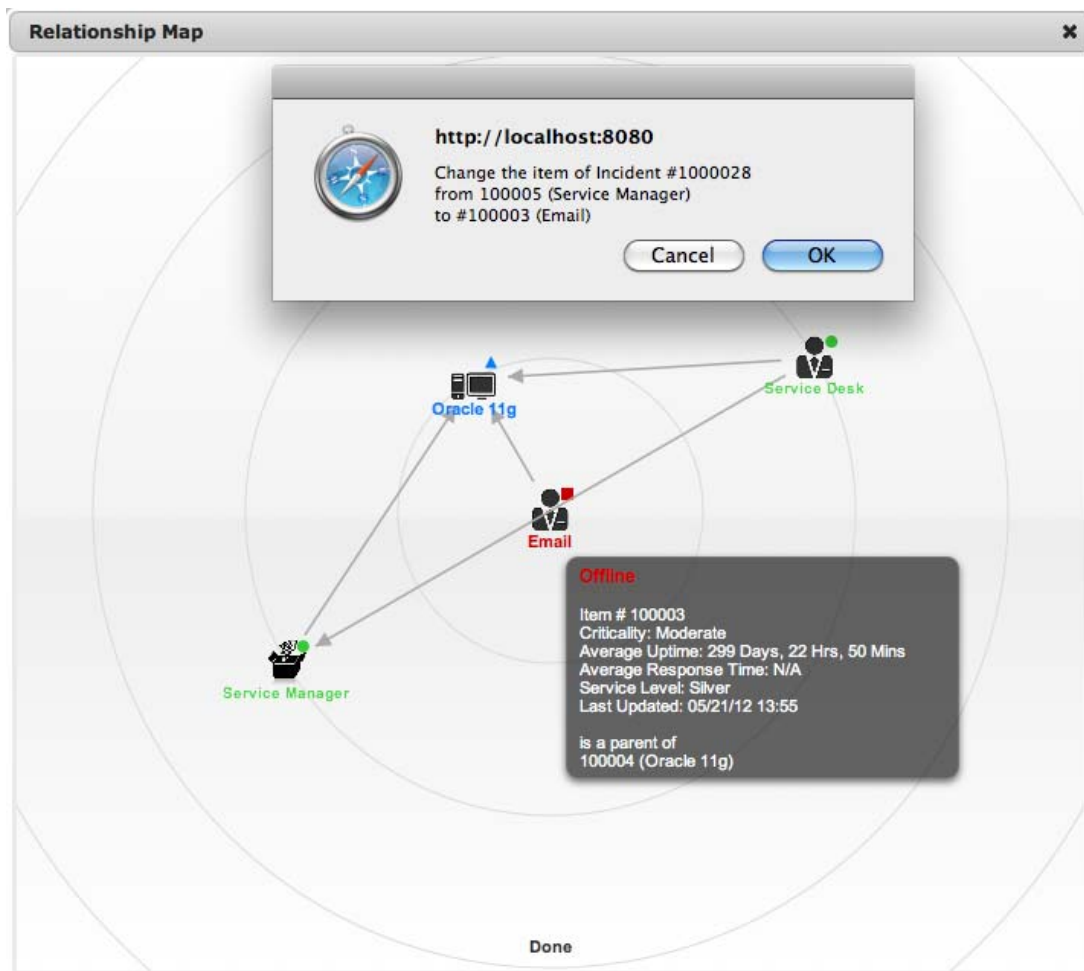



### ***Updating the Item associated with the Request***

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  to close the window.  
The Item assignment change is recorded in the Audit tab.

## Notes Tab

- ◆ “Notes” on page 458
- ◆ “Add Note Button” on page 458
- ◆ “Viewing All Notes” on page 458
- ◆ “Adding a Note” on page 458
- ◆ “Create Knowledge” on page 460
- ◆ “Solution” on page 460
- ◆ “Draft Note” on page 460
- ◆ “Changing the Status of a Note” on page 460
- ◆ “Viewing a Note” on page 461

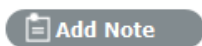
- ♦ [“Replying to a Note” on page 461](#)
- ♦ [“Emailing Saved RFC Notes” on page 462](#)
- ♦ [“Adding Notes to Groups” on page 462](#)

### **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

The Change 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 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  .

---

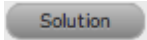
**NOTE:** A Technician can only add RFC Notes if they belong to the work group associated with the current RFC status.

---

## 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



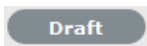
If a Note resolves the issue, the Note can be saved as the Solution. This will convert the Note into a Solution Article (found under Change Request>Analysis tab), by enabling the Create Knowledge option before selecting the Solution button. Clicking the Solution button will automatically move the Change 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 ----<br><br>Please enroll my name in the E-Learning Portal.<br><br>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 |
|--------------------|----------------|--|----------|---|---|---------|
| <a href="#">12</a> | 01/12/16 11:43 | ---- Initial Description ----<br><br>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 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

Email

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

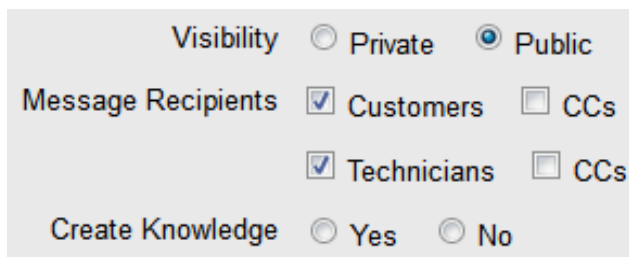
When a Note is created for a Request that belongs to a Group, the Apply to Group option is visible within the Notes tab. If the new Note is to be assigned to all requests within the Group, select the Apply to Group option.

---

**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 form with the following options:

- 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.

## Attachments Tab

- ♦ [“Attachments” on page 462](#)
- ♦ [“Adding an Attachment” on page 462](#)
- ♦ [“Deleting an Attachment” on page 463](#)

## 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

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 |
|------------------------------|--------|----------------|-------|
| <a href="#">Penguins.jpg</a> | 760 KB | 01/12/16 15:14 |       |
| <a href="#">Desert.jpg</a>   | 826 KB | 01/12/16 15:14 |       |

---

**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 464](#)
- ◆ [“Service Targets” on page 464](#)
- ◆ [“Service Level Breaches” on page 465](#)
- ◆ [“Services Affected” on page 466](#)
- ◆ [“Estimates” on page 466](#)
- ◆ [“Planned Outages” on page 467](#)
- ◆ [“Contract Monitor” on page 467](#)

## 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.

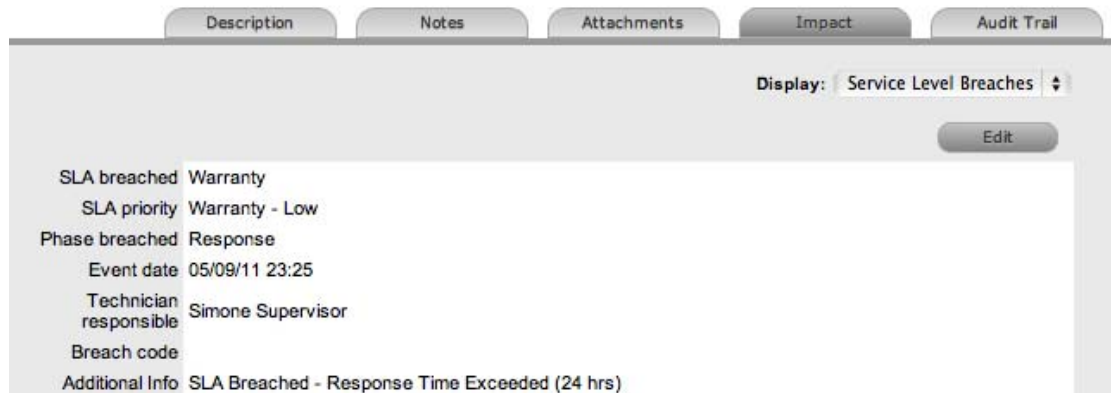


The screenshot shows a web interface for 'Problem Information' with several tabs: Customer, Contract, Analysis, Summary, Notes, Attachments [2], Impact, and Audit Trail. The 'Impact' tab is selected, and a dropdown menu is open showing 'Display: Service Targets'. Below the dropdown is a table with the following data:

| Name | Priority | Response Time | Restoration Time | Resolution Time | 24 x 7 support |     |
|------|----------|---------------|------------------|-----------------|----------------|-----|
| SLA  | 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.

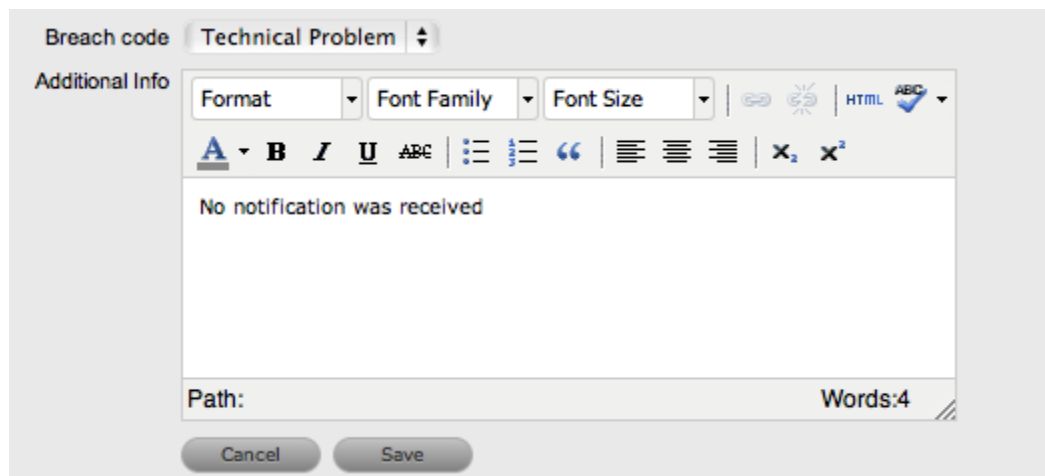


The screenshot shows a web interface with tabs for Description, Notes, Attachments, Impact, and Audit Trail. The 'Impact' tab is selected, and the 'Display' dropdown is set to 'Service Level Breaches'. An 'Edit' button is visible. The main content area displays the following information:

|                        |  |
|------------------------|--|
| 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 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



The screenshot shows a dialog box for assigning a Breach Code. The 'Breach code' dropdown is set to 'Technical Problem'. Below it is a rich text editor for 'Additional Info' with a toolbar containing options for Format, Font Family, Font Size, and various text formatting tools. The text area contains the message 'No notification was received'. At the bottom, there is a 'Path:' field and a 'Words:4' counter. 'Cancel' and 'Save' buttons are at the bottom of the dialog.

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.

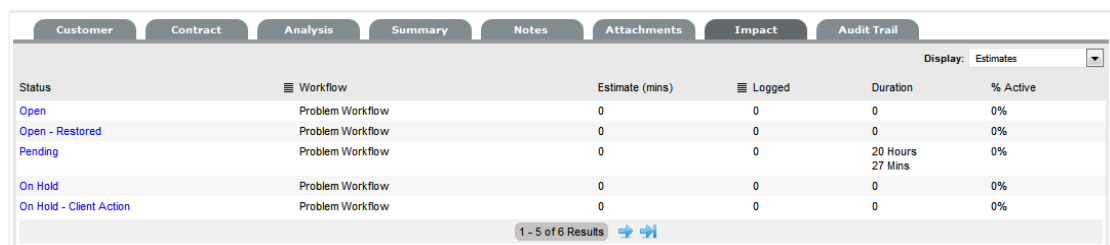
## Estimates

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 |
|---|------------------|-----------------|--------|---------------------|----------|
| <a href="#">Open</a>                    | Problem Workflow | 0               | 0      | 0                   | 0%       |
| <a href="#">Open - Restored</a>         | Problem Workflow | 0               | 0      | 0                   | 0%       |
| <a href="#">Pending</a>                 | Problem Workflow | 0               | 0      | 20 Hours<br>27 Mins | 0%       |
| <a href="#">On Hold</a>                 | Problem Workflow | 0               | 0      | 0                   | 0%       |
| <a href="#">On Hold - Client Action</a> | Problem Workflow | 0               | 0      | 0                   | 0%       |

1 - 5 of 6 Results

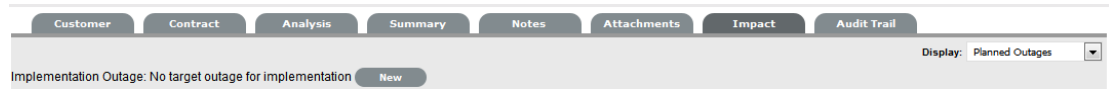
## Planned Outages

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.

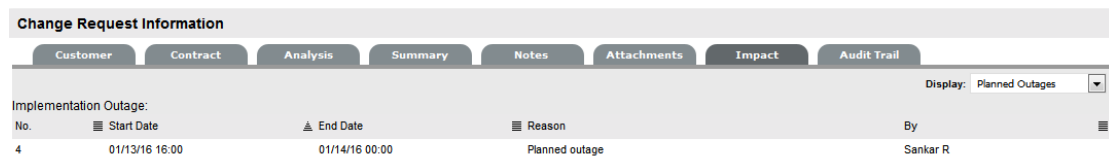
Creating an Implementation Outage:

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



| No. | Start Date     | End Date       | Reason         | By       |
|-----|----------------|----------------|----------------|----------|
| 4   | 01/13/16 16:00 | 01/14/16 00:00 | Planned outage | Sankar R |

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.                          |

The screenshot displays a user interface for contract management. It features a 'Details' section with 'Underpinning Contract' set to 'Canton Services' and 'Start Time' as '05/11/11 21:21'. Below this is a 'Milestones' section with the following items:

- Expected Response Time:** 05/12/11 21:21. A red vertical bar is present next to the time, with a red arrow pointing to it from the text 'Breached Response Time'.
- Responded:** An unchecked checkbox.
- Expected Restoration Time:** 05/13/11 21:21.
- Restored:** An unchecked checkbox. A red arrow points to it from the text 'Check when the Service Provider meets the Restoration or ResolutionTime'.
- Expected Resolution Time:** 05/15/11 21:21.
- Resolved:** An unchecked checkbox. A red arrow points to it from the same text as above.
- Comments:** A large empty text area with a blue border.

**NOTE:** If Milestones are breached the Response, Restoration and Resolution times are assigned a red marking.

## Audit Tab

- ◆ [“Audit” on page 469](#)
- ◆ [“Audit Trail” on page 469](#)
- ◆ [“Resource Utilization” on page 469](#)
- ◆ [“Item Audit Trail” on page 469](#)
- ◆ [“Request Approvals” on page 469](#)



- ◆ “Service Terms” on page 470
- ◆ “Time Recorded” on page 471

### **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.

The screenshot shows a software 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: No., Date, Event, and By. A 'Display:' dropdown menu is open, showing options: Request Approvals, Audit Trail, Resource Utilization, Item Audit Trail, and Request Approvals. The table contains three rows of data.

| No. | Date           | Event   | By       |
|-----|----------------|---|----------|
| 132 | 01/13/16 11:25 | Item has been added to outage 4                       | Sankar R |
| 115 | 01/11/16 10:22 | Monthly Cost set to '0' Delegate Costs changed fro... | Sankar R |
| 114 | 01/11/16 10:19 | Item created whilst creating new task.                | Sankar R |

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.

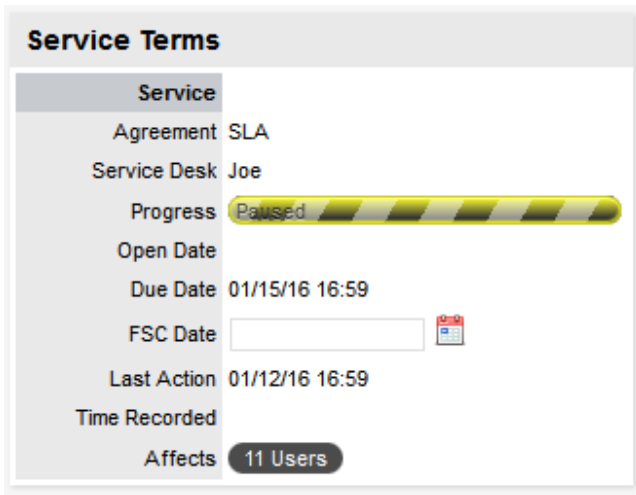
### **Request Approvals**

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.



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



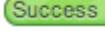

|                 |   |
|-----------------|---|
| Agreement       | <p>Displays the Service Level Agreement assigned to the Request. The service level is derived from either the Customer, Organizational Unit or Item.</p> <p>When Contracts are not enabled, the Agreement field can be edited when the RFC is in edit mode.</p> |
| Service Manager | <p>Displays the User assigned as the Service Manager for the assigned SLA.</p>  |

---

---

## Service Terms

---

|                  |   |
|------------------|---|
| 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> - 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 Change Request is created.  |
| Due Date         | 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.  |
| FSC Date         | 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.   |
| Fix Date         | Auto-filled when the Request 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 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.

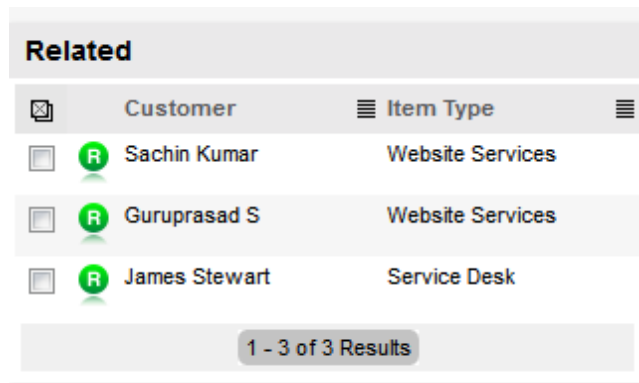
## Related Requests

- ◆ [“Managing Related Requests” on page 472](#)
- ◆ [“Bulk Updates” on page 473](#)
- ◆ [“Remove Related Requests” on page 473](#)

The Related Requests sidebar is automatically displayed when a Change Request is linked to other Requests.

RFCs can be linked in the following ways:

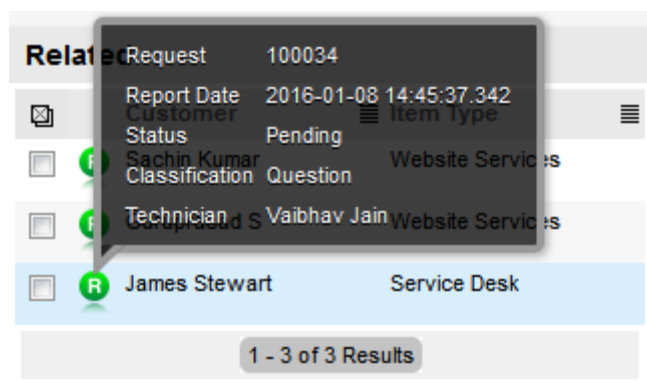
- ◆ Using the Group option within the RFC list
- ◆ Using the Change Group feature under the Change tab
- ◆ Linking requests within the RFC's Analysis tab
- ◆ A result of multi-Item Request creation.



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 with the 'Status' dropdown menu open. The menu lists various status options categorized by 'Team' (Customer, Technician) and 'Status'. The 'Closed - Resolved' option is highlighted in blue. Other visible options include 'Cancelled - Unpaid', 'Closed - Restored', 'On Hold', 'On Hold - Client Action', 'On Hold - Pending Approval', 'On Hold - Process Escalated', 'Open', 'Open - Restored', and 'Pending - No Contract'.

## 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.  |

| Status                | Description   |
|-----------------------|---|
| 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.

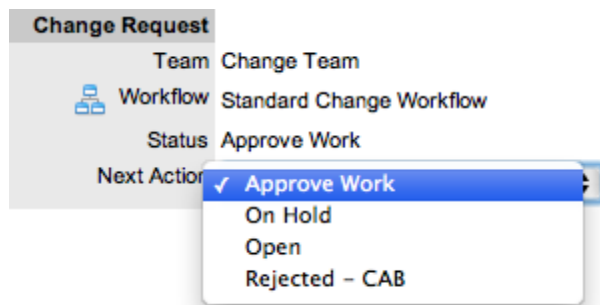
**NOTE:** When an RFC is created, it is automatically assigned the Pending-CAB status. The CAB defines the Workflow the RFC follows, which in turn determines the Statuses available for the RFC.

## 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:

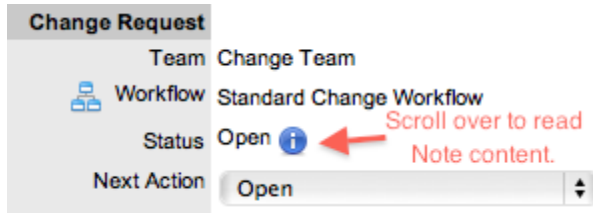
- ◆ When Billing is enabled and payment is not received
- ◆ When SLA parameters are violated.

## 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.

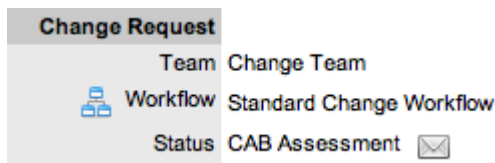
## Viewing a Status Note

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



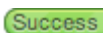

SLA Triggers fire for Requests that are in a Workflow State that has the Service Timer Active option set to Yes. The default Timer Active set for systems States can be changed if relevant for the organization. For example, it may not be appropriate for an organization to have SLA Triggers fire when a 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.

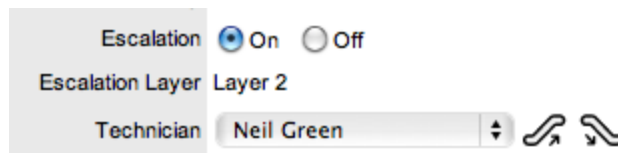
Note, if the Self Assign option is enabled for the Team, the system assignment logic is ignored and the User creating the request is automatically assigned the RFC.

## 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   |   |
|------------------------|---|
| <b>Incident #:</b>     | 100053  |
| <b>Date Opened:</b>    | 08/18/06 15:24 (mm/dd/yy hh:mm)                   |
| <b>Classification:</b> | Printing  |
| <b>Technician:</b>     | Supervisor User                                   |
| <b>Item #:</b>         | 100005  |
| <b>Item Type:</b>      | word  |
| <b>Identifier:</b>     |   |
| <b>Customer:</b>       | Bob Samson  |
| <b>Company:</b>        | Sales   |
| <b>Due Date:</b>       | 08/21/06 15:24                                    |
| <b>Description:</b>    | 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

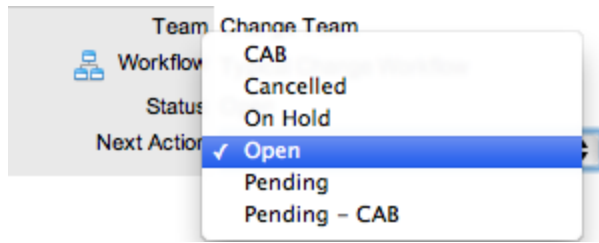
To move a Change Request through the stages of the Workflow, in the Summary tab of the Change Request Information screen:

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.

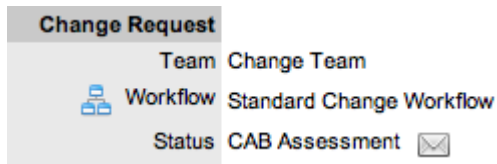




3. Select a State
4. Click Save.

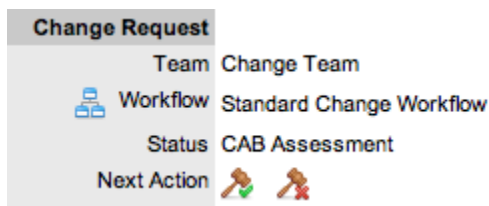
The selected Status is assigned to the Change Request with the updated logic applied (i.e., The SLA Timers may now be active or inactive based on the newly assigned State configuration or an alternative Work or Manager Group may have been assigned to the Request.

## 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 Blacklett
- 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)

*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.*

**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

*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' section of a software interface. It features several tabs: Information, Details, Costs, Requests, Relationships, Outages, and AMIE Snapshots. Below the tabs are buttons for 'Duplicate' and 'Print'. The 'Item # 10000101 (Iphone 6)' is displayed on the right. The 'Contract' section is expanded, showing 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 next to an 'Enable' button. A red arrow points to the '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' field in a software interface. The 'Subject' field contains the text 'Details required'. The 'Description' field has a rich text editor with a toolbar and contains the text 'When will the service be available?'. The 'Path' field is empty, and the 'Words: 6' counter is visible.

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:

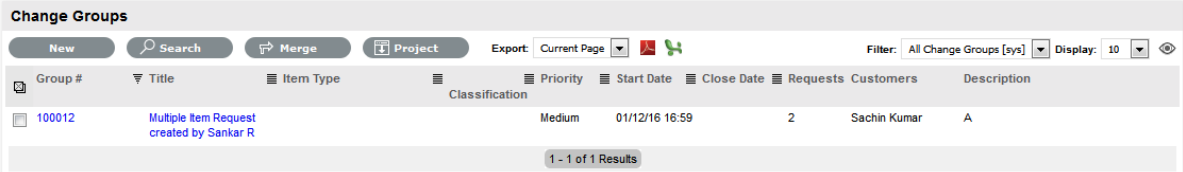
- ◆ They are all logged by Users of one department
- ◆ They are all logged by one Customer
- ◆ They are all logged for the same Configuration Item
- ◆ They have a common Description or Solution.

---

**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.



The screenshot shows the 'Change Groups' interface. At the top, there are buttons for 'New', 'Search', 'Merge', and 'Project'. To the right, there are 'Export' options (Current Page, PDF, Excel) and a 'Filter' dropdown set to 'All Change Groups [sys]' and a 'Display' dropdown set to '10'. Below this is a table with the following columns: Group #, Title, Item Type, Classification, Priority, Start Date, Close Date, Requests, Customers, and Description. One row is visible with the following data: Group # 100012, Title Multiple Item Request created by Sankar R, Item Type, Classification, Priority Medium, Start Date 01/12/16 16:59, Close Date, Requests 2, Customers Sachin Kumar, and Description A. At the bottom of the table, it says '1 - 1 of 1 Results'.

| 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

The screenshot shows the 'New Group' dialog box with the 'Details' tab selected. The 'Use Template' checkbox is checked, and a dropdown menu is open below it. The 'Name' field contains 'G1'. The 'Description' field has a rich text editor toolbar with options for bold, italic, underline, font family, font size, and text color. The 'Path' is 'p' and 'Words' is '0'. The 'Cancel' and 'Next' buttons are at the bottom right.

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.



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](mailto:sachin@nsd.com)  
 Phone  
 Address  
 City  
 State  
 Zip  
 Country

**Selected Requests**

| <input type="checkbox"/>            | 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

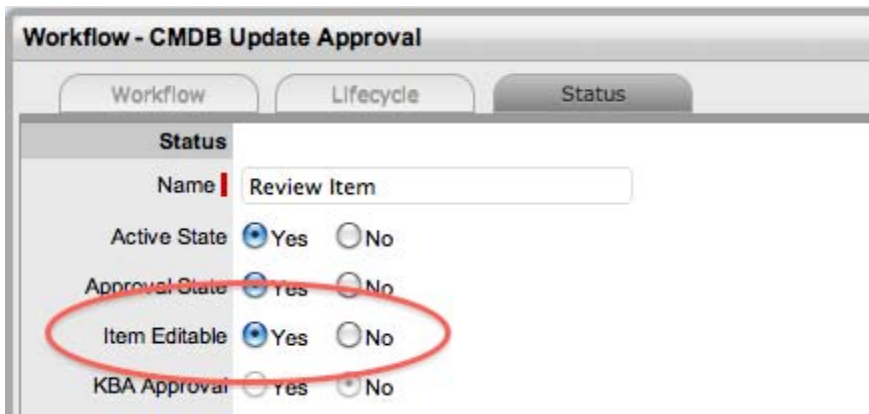
Workflow Standard Change Workflow

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.

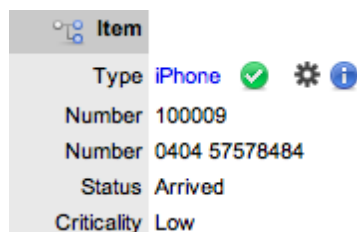
To update the CMDB by applying the newly created or edited Item details that prompted the creation of an RFC:


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.

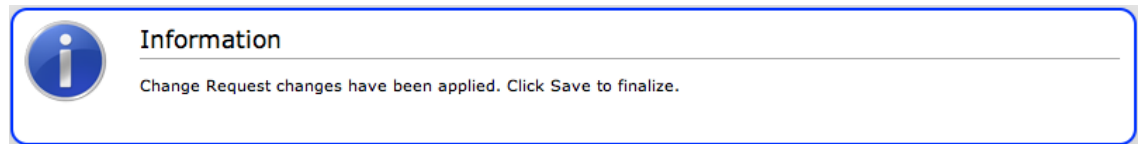


5. Click  to apply the Item information to the CMDB



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.

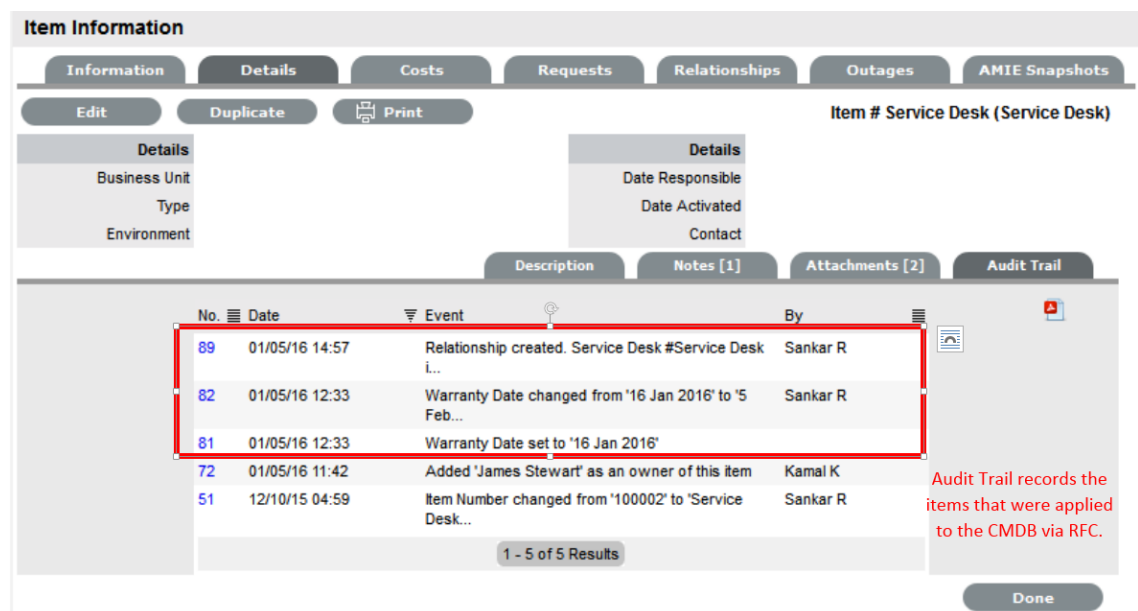
7. Save the RFC.

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.

---



The screenshot shows the "Item Information" screen for a "Service Desk" item. The top navigation bar includes tabs for "Information", "Details", "Costs", "Requests", "Relationships", "Outages", and "AMIE Snapshots". Below the navigation are buttons for "Edit", "Duplicate", and "Print". The main content area is divided into two "Details" sections. The left section lists "Business Unit", "Type", and "Environment". The right section lists "Date Responsible", "Date Activated", and "Contact". Below these are tabs for "Description", "Notes [1]", "Attachments [2]", and "Audit Trail". The "Audit Trail" tab is active, displaying a table of events. A red box highlights three rows in the table. A red text box on the right side of the table states: "Audit Trail records the items that were applied to the CMDB via RFC." At the bottom right of the screen is a "Done" button.

| 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 |

## 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.

The screenshot displays the 'Change Request Information' interface for Change Request # 100079. The interface is divided into several sections:

- Customer:** Vamsi Krishna
- Item Number:** 100026
- Type:** Iphone 6
- Classification:** General
- Urgency:** Moderate
- Impact:** Moderate
- Priority:** Medium
- Assignments:**
  - Escalation: On
  - Escalation Layer: Default Group
  - Technician: Ingo Engels
- Notification:**
  - Customer: Email
  - Technician: Email
- Change Request:**
  - Team: Change Management Team
  - Workflow: Standard Change Workflow
  - Status: Pending - No Contract
  - Next Action: Pending - No Contract

4. Click the **+**, next to the Item Type 'Unknown'  
The Item creation screen appears.

**Information**

Change Request changes have been applied. Click Save to finalize.

**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 12 Users

Find Item Type (Name)

Find Customer (Last Name)

Find Org. Unit (Name)

Cancel
Next

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.<br><b>NOTE:</b> 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

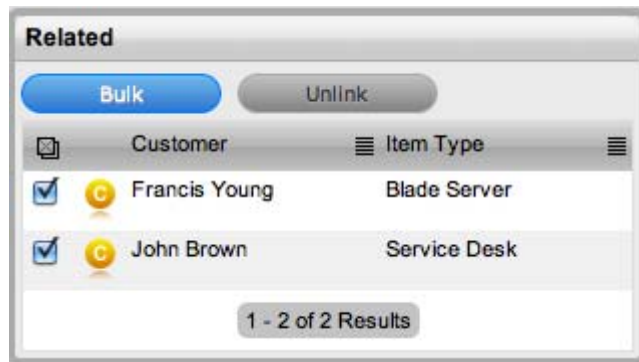
The screen defaults to the Details tab for the Merge Group.

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](#)

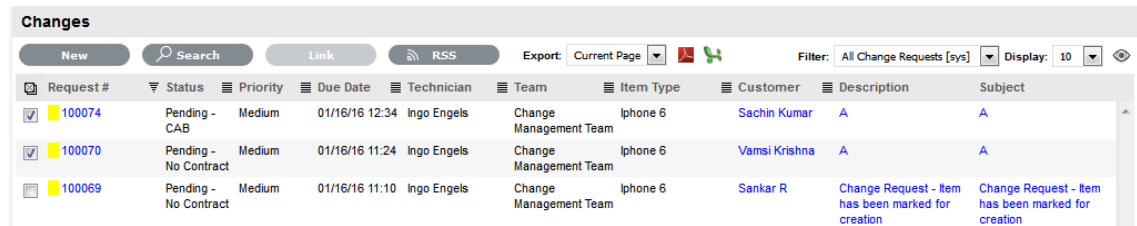
## 2.5.3 Grouping Change Requests

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 501](#)
- ◆ [“Multi-Item Request Item Assignment” on page 501](#)



## 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.

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.

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.

| Customer      | Item No.     | Item Type    |
|---------------|--------------|--------------|
| James Stewart | Wifi Service | WIFI Service |

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.

4. 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 503](#)
- ◆ [“Releases” on page 504](#)
- ◆ [“Release Management Applied” on page 518](#)

### 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.  |
| 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       | <p>Set the Workflow that includes the relevant stages to manage the Release.</p> <p>The Release Manager moves the Release through the stages of the Workflow, relevant to the events being undertaken and completed.</p>  |
| Status         | This is set to the Default Entry State of the selected Workflow.  |
| Next Action    | <p>Based on the assigned Workflow, select the next Workflow State for the Release, as required by the next Release activity.</p> <p>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.</p> |
| Manager        | <p>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.</p> <p>The User defined here, is the Manager who can edit the Release after it is saved and then move it to the next State.</p>   |

| Release Fields | Description   |
|----------------|---|
| RFC Control    | <p>If the Control Deployments via RFC option is enabled in Admin&gt;Setp&gt;Privileges&gt;Requests, this field will be displayed.</p> <p>Select Yes if the Deployment is to be routed through Change Management, to enable the scheduling of Deployment Tasks.</p> <p>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.)</p> |
| 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.

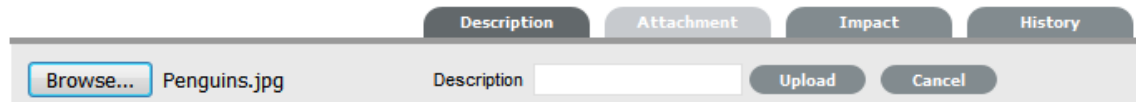


## Attachments

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 .

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 the History tab table. At the top, there are four tabs: Description, Attachments, Impact, and History. Below the tabs, there is a table with the following columns: No., Date, Note, Status, Priority, By, and a menu icon. The table contains four rows of data. At the bottom of the table, there is a '1 - 4 of 4 Results' indicator.

| No. | Date              | Note  | Status | Priority | By       |  |
|-----|-------------------|---|--------|----------|----------|--|
| 31  | 01/13/16<br>14:47 | Change Request 100078, Change Request 100077 have ... | Open   | Medium   | Sankar R |  |
| 30  | 01/13/16<br>14:46 | Change Request 100061 has been removed from the Gr... | Open   | Medium   | Sankar R |  |
| 29  | 01/13/16<br>14:42 | Change Request 100079 has been added to the Group     | Open   | Medium   | Sankar R |  |
| 25  | 01/12/16<br>16:59 | Group 100012 created as a container for multi-item... | Open   | Medium   | Sankar R |  |

2. Click on the identification number hyperlink to display the entry details
3. Click Cancel.

The expanded window is closed.

## Item Types Tab

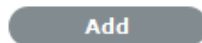
Within the Types Tab the Release Manager can define one or multiple Item Types for the Items that will be affected by the Release and why the Types will be affected. The reasons the Types are affected include creating new Items, updating existing Items in the CMDB, or replacing existing Items with other 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.

 A screenshot of a software dialog box titled "Release - Rollout Printers". The dialog has five tabs: "Details", "Item Types", "Analysis", "Elements", and "Deployments". The "Item Types" tab is selected. On the left, there is a sidebar with a "Details" section containing "New Type" with a plus icon, "Reason" with a dropdown menu set to "New", and "Media Attachment" with a dropdown menu and a plus icon. On the right, there is a search field labeled "Find Item Type (Name)" with a magnifying glass icon. At the bottom right, there are "Cancel" and "Save" buttons.

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.

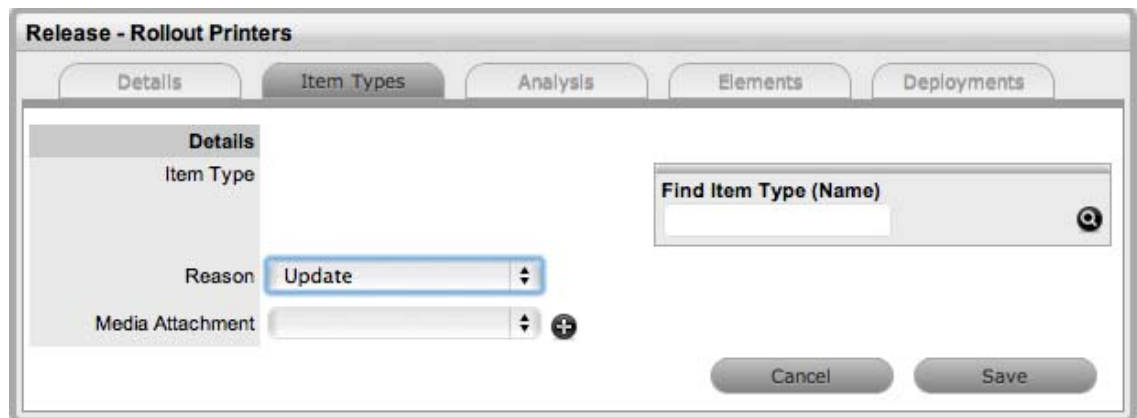
To upgrade Items as part of the Release, define the Item Type within the Types tab in Edit mode by:

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

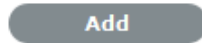
The media file may be an installer or executable file and will be made available within the Deployment Task.

6. Click Save.


Additional Item Types can be added to the Release by repeating the above process.

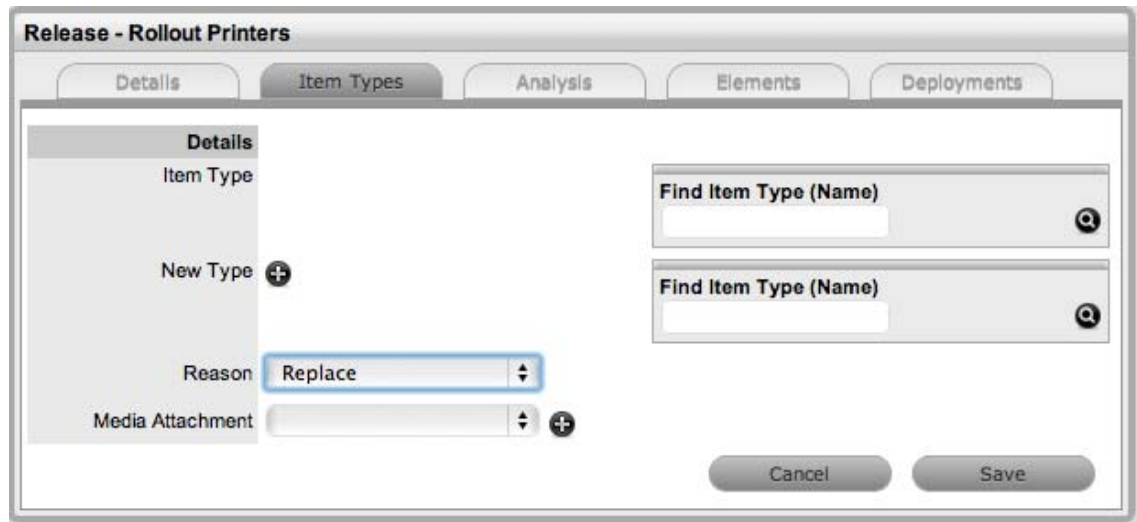
To replace Items as part of the Release, define the Item Type within the Types tab in Edit mode by:

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 Replace

Media Attachment

**Fields**

CPU

RAM

MAC Address

Network Address

Network Name

Platform Windows

OS Version **Windows 2008**

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

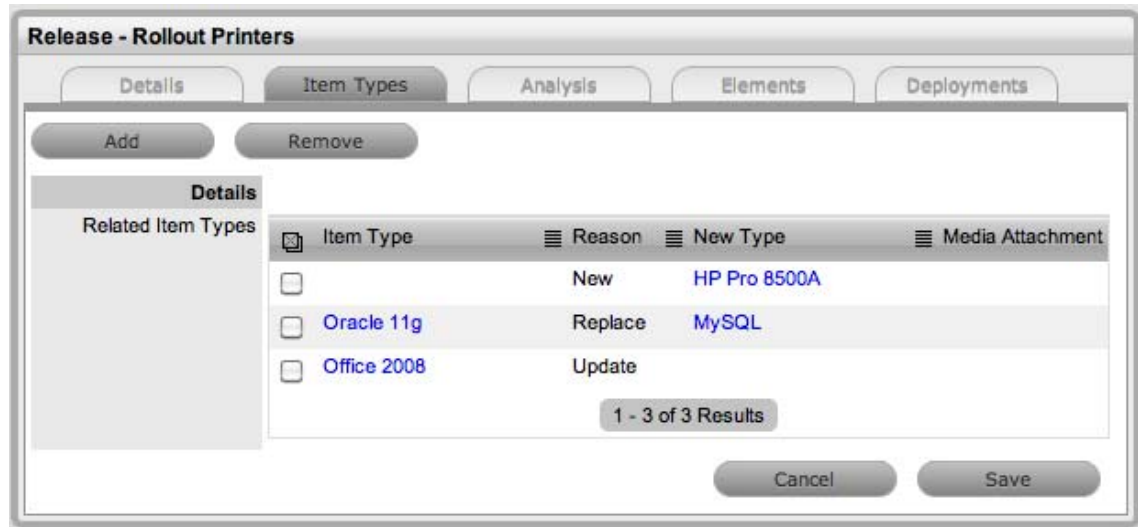
This information will automatically be populated to the newly created Item's Details tab, when the Deployment Task is completed and the Item entered into the CMDB.

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.

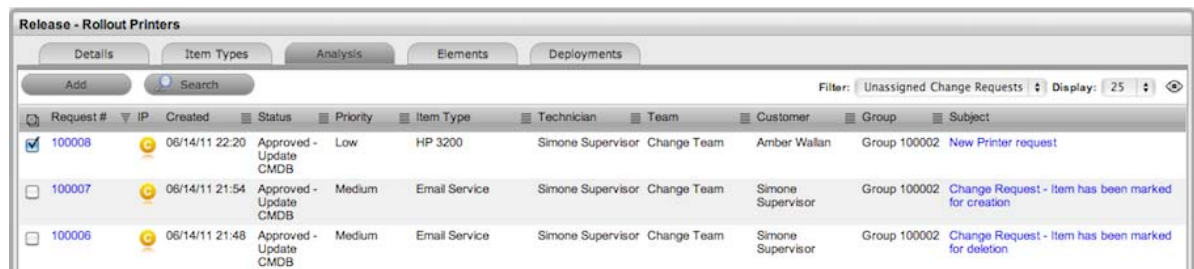


After all the Item Types have been added to the Release click Save, and move to the Analysis tab to associate any pre-existing Change Requests to the Release package.

## 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 #

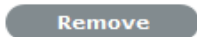
links and click .



## 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

.

## Deploy Tab

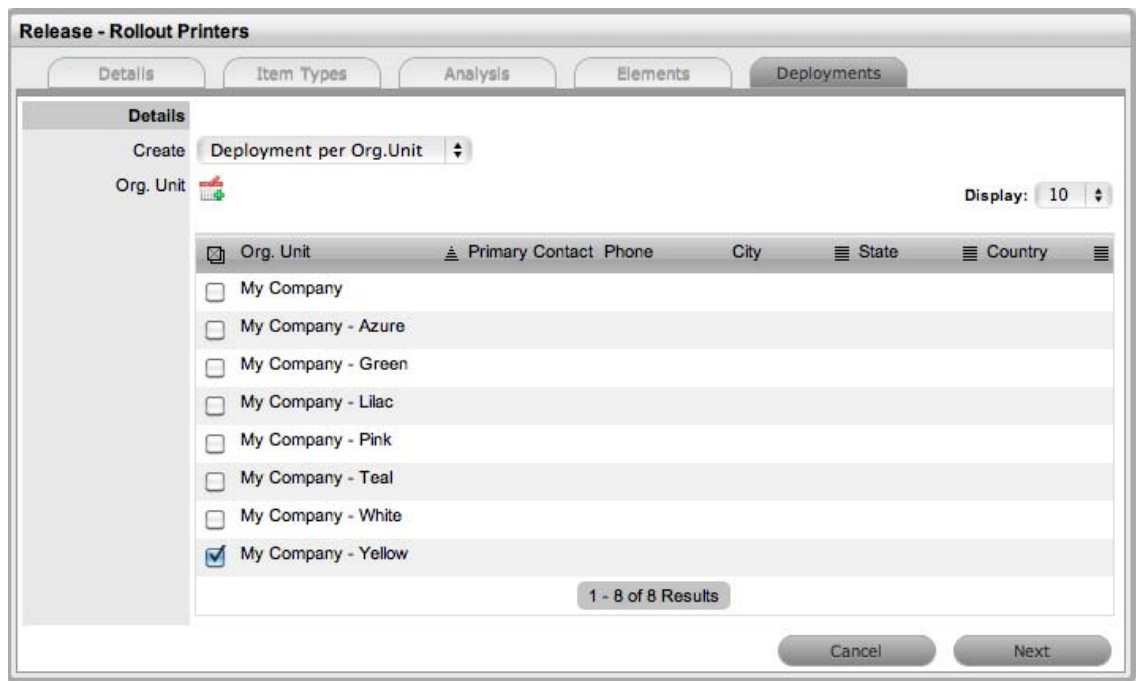
The Deploy tab allows the Manager to define where the Deployment is to be pushed and who will be working on the Release by creating Deployment Tasks. Deployments can be created on a Per Customer, Per Organizational Unit or Global Deployment basis.

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><b>NOTE:</b> 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



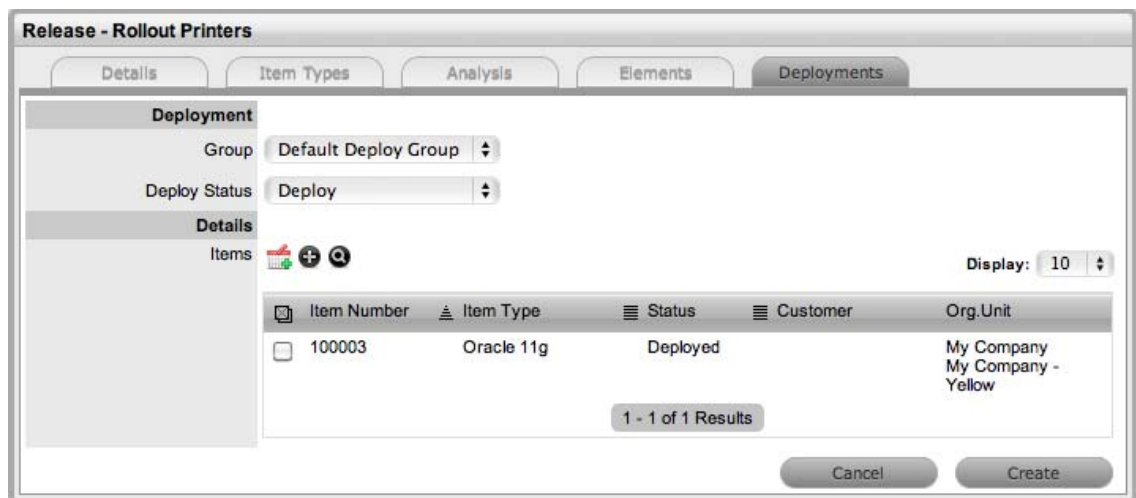
4. Click 

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

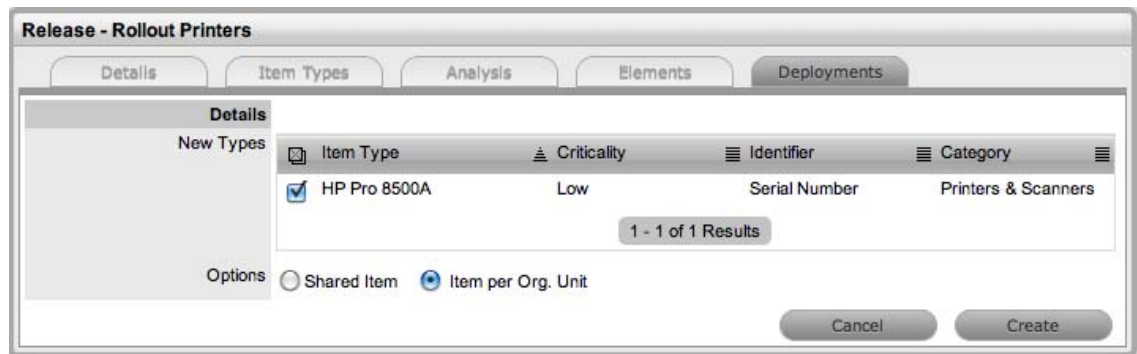
The list is derived from the Groups tab of a Release Team.

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.

**Team Information**

Information Service Group States Layers

TeamSMG1

Groups

| Name                  | Assigned Technicians | Assigned Managers | Group Type |
|-----------------------|----------------------|-------------------|------------|
| Default Group         | Craig Wilson         |                   | Technician |
| Default Manager Group |                      | Mike S            | Manager    |

1 - 2 of 2 Results

Cancel New Save

To create the Release:

1. Go to Change>Releases
2. Click New
3. Complete the Release information

**New Release**

Details Item Types Analysis Elements Deployments

New Release

Details

Name

Priority Low

Team

Group

Workflow

Description Attachment Impact History

Description

Format  Font Family  Font Size  |   HTML

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

Path: p Words: 0

Cancel Save

**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       | <p>Set the Workflow that includes the relevant stages to manage the Release.</p> <p>The Release Manager moves the Release through the stages of the Workflow, relevant to the events being undertaken and completed.</p>  |
| Status         | This is set to the Default Entry State of the selected Workflow.  |
| Next Action    | <p>Based on the assigned Workflow, select the next Workflow State for the Release, as required by the next Release activity.</p> <p>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.</p> |
| Manager        | <p>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.</p> <p>The User defined here, is the Manager who can edit the Release after it is saved and then move it to the next State.</p>   |
| RFC Control    | <p>If the Control Deployments via RFC option is enabled in Admin&gt;Setp&gt;Privileges&gt;Requests, this field will be displayed.</p> <p>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.</p>                 |
| 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.

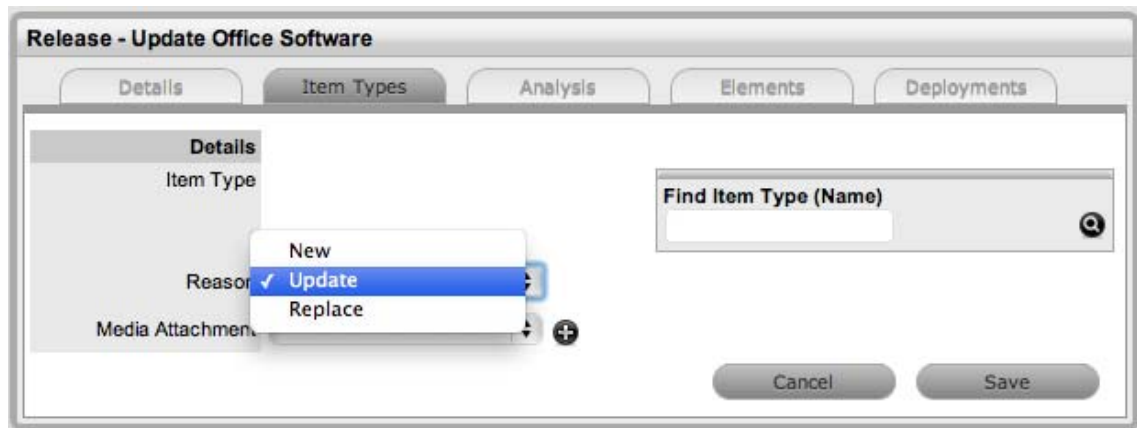
As a Release Manager, to assign Item Types to the Release:

1. Select the Item Types tab inside the Release information screen
2. Click Edit
3. Click Add

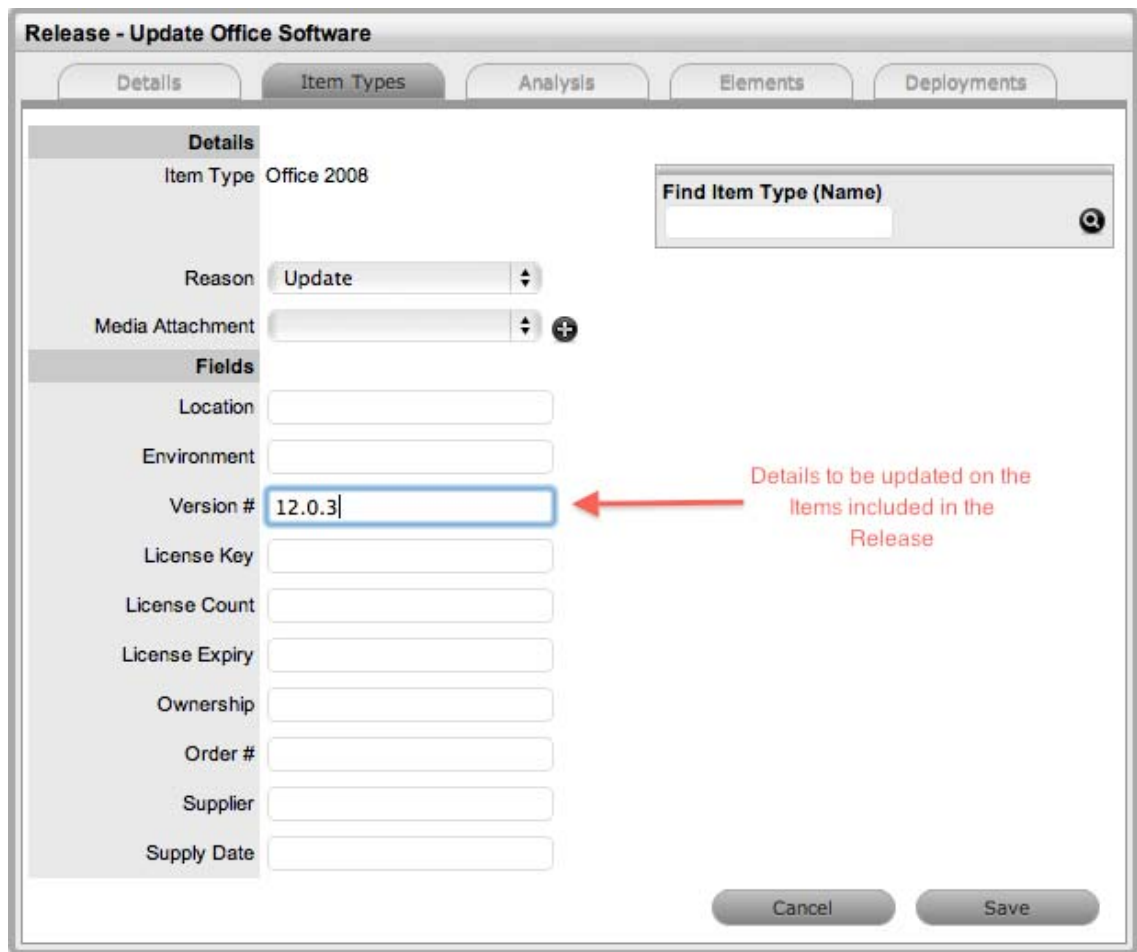
The screenshot shows a software interface titled "Release - Update Office Software". At the top, there are five tabs: "Details", "Item Types", "Analysis", "Elements", and "Deployments". The "Item Types" tab is currently selected. On the left side, there is a "Details" sidebar with a "New Type" button (indicated by a plus sign). Below this, there are two dropdown menus: "Reason" (set to "New") and "Media Attachment" (with a plus sign). On the right side, there is a search box labeled "Find Item Type (Name)" with a magnifying glass icon. At the bottom right, there are two buttons: "Cancel" and "Save".

#### 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.



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.

The screenshot shows a software update dialog titled "Release - Update Office Software". It has five tabs: "Details", "Item Types", "Analysis", "Elements", and "Deployments". The "Item Types" tab is selected. On the left, under "Details", there are fields for "Item Type", "New Type" (with a plus icon), "Reason" (set to "Replace"), and "Media Attachment". On the right, there is a search box "Find Item Type (Name)" containing the text "Open". Below the search box is a table with two columns: "Item Type" and "Item Category". The table contains one row: "OpenOffice" under "Item Type" and "Software" under "Item Category". Below the table, it says "1 - 1 of 1 Results". A "Search" button is highlighted in yellow. At the bottom right, there are "Cancel" and "Save" buttons.

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

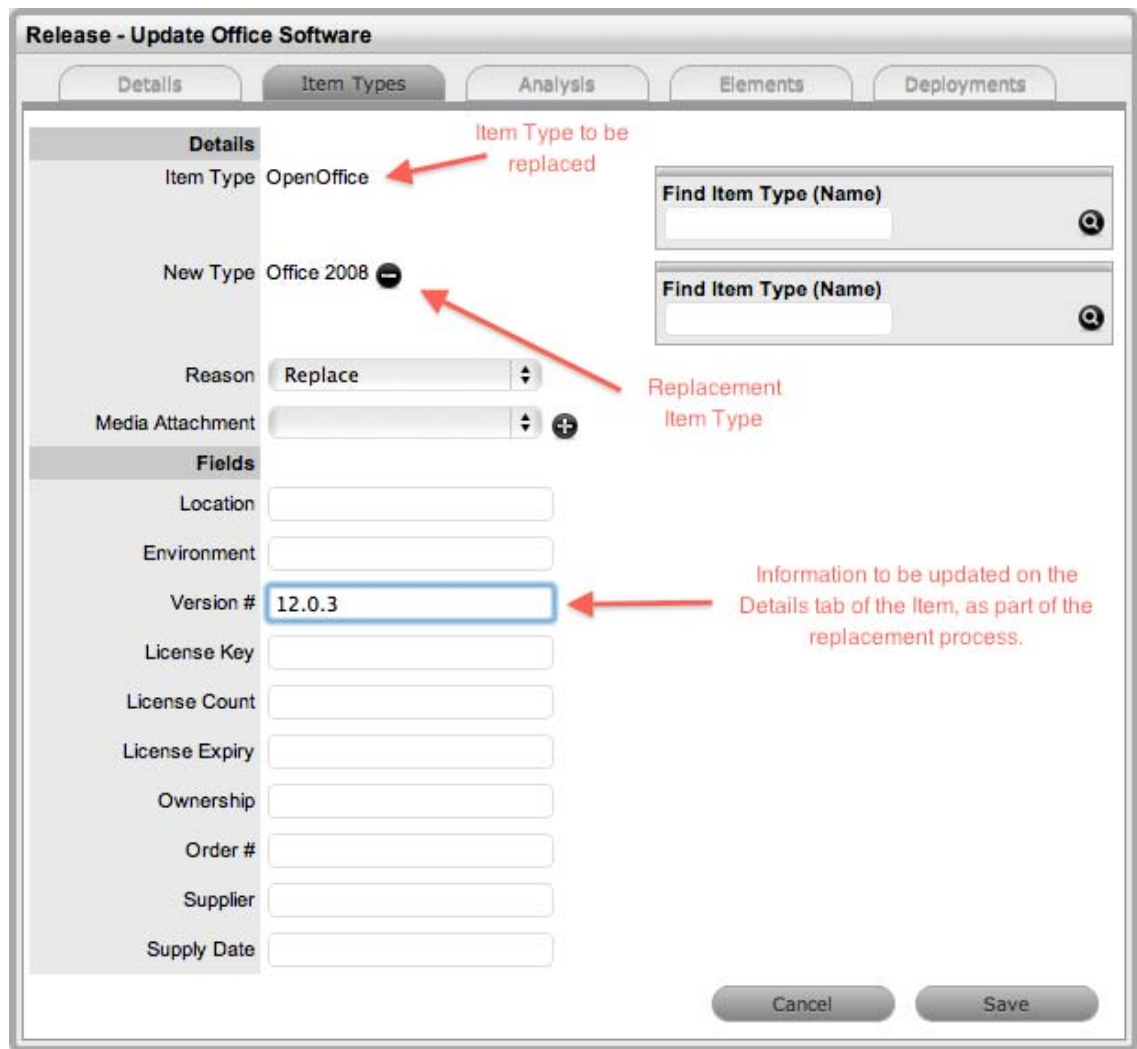
For this example, Office 2008 is the replacing Item Type.

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.




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  

**Fields**

Location

Environment

Version # 12.0.3

License Key

License Count


License Expiry

Ownership

Order #

Supplier

Supply Date

**Find Item Type (Name)**  

*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

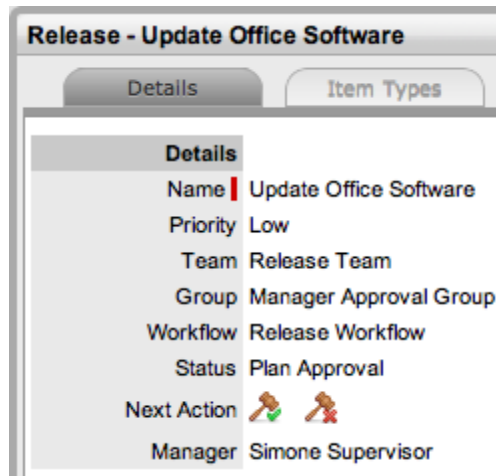
| <input type="checkbox"/> | Item Type   | Reason  | New Type    | Media Attachment |
|--------------------------|-------------|---------|-------------|------------------|
| <input type="checkbox"/> |             | New     | Office 2008 |                  |
| <input type="checkbox"/> | Office 2008 | 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.

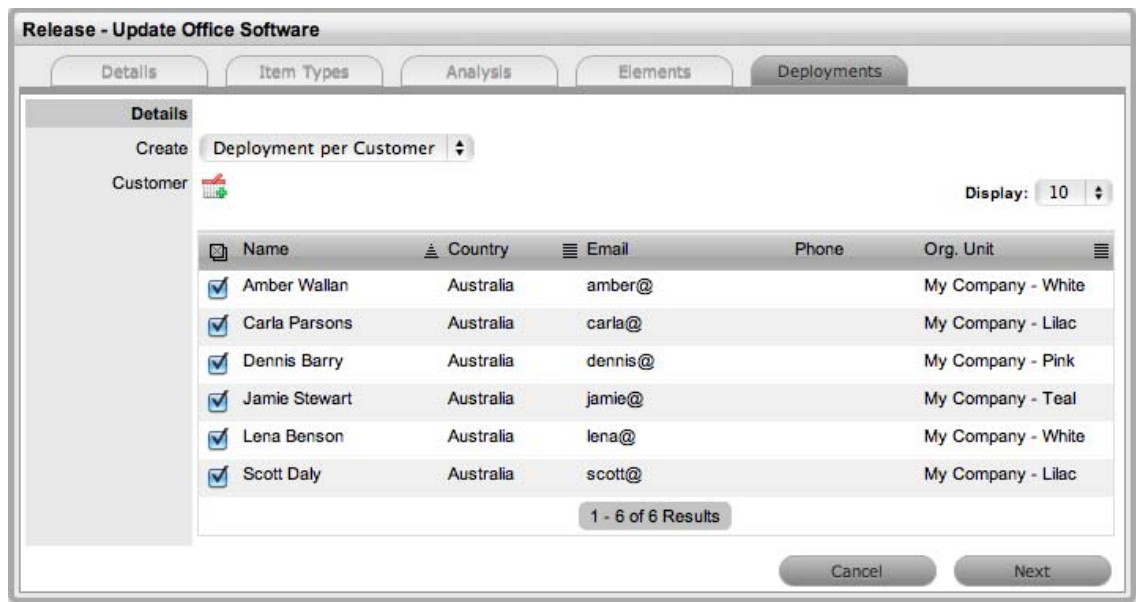
To create the group of Deployment Tasks:


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.

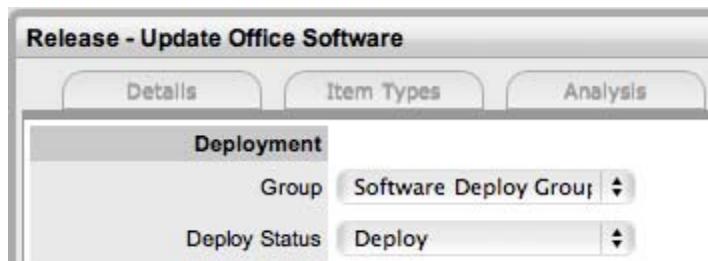


- Assign the Customer(s) to the per Customer Deployment by selecting the field next to the Customer name and clicking 

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

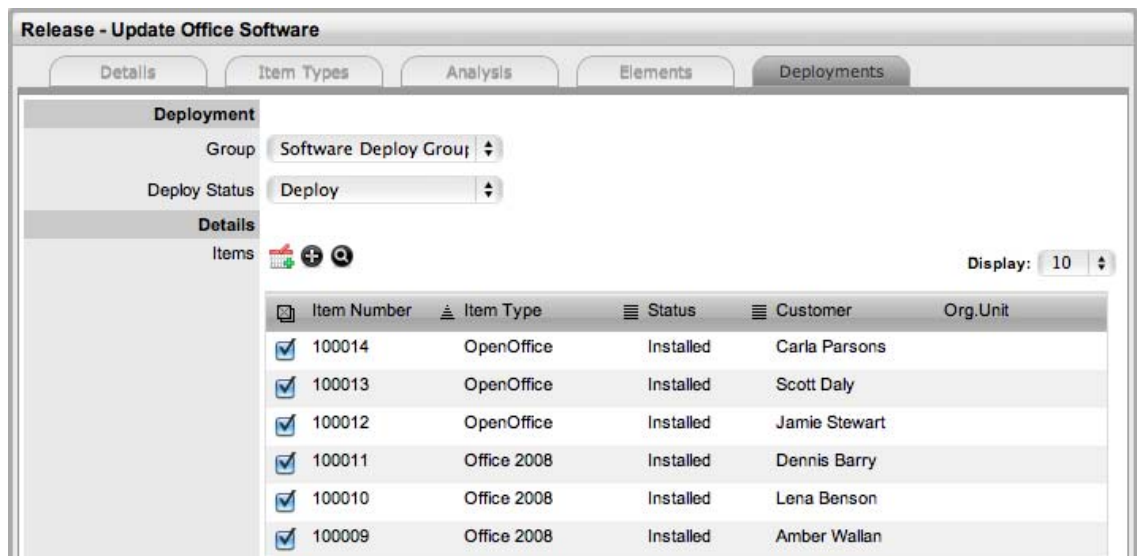
For this example the Software Technicians will be assigned.




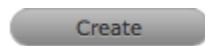
- Assign the stage of the Workflow where the Deployment Tasks will become active in the system  
As the Release is related to simply upgrading or installing Office 2008, the Deploy State will be assigned as the action State.


- Select the Items to be included in the Deployment

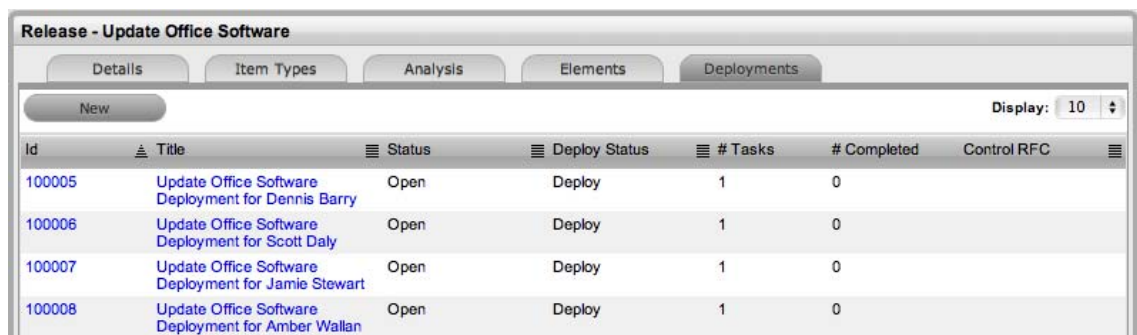
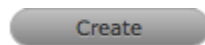
For this example, as the replacement and upgrade of Items is simple software, all Items will be created as one Deployment that will result in individual Tasks being created.



9. Click 
10. Click

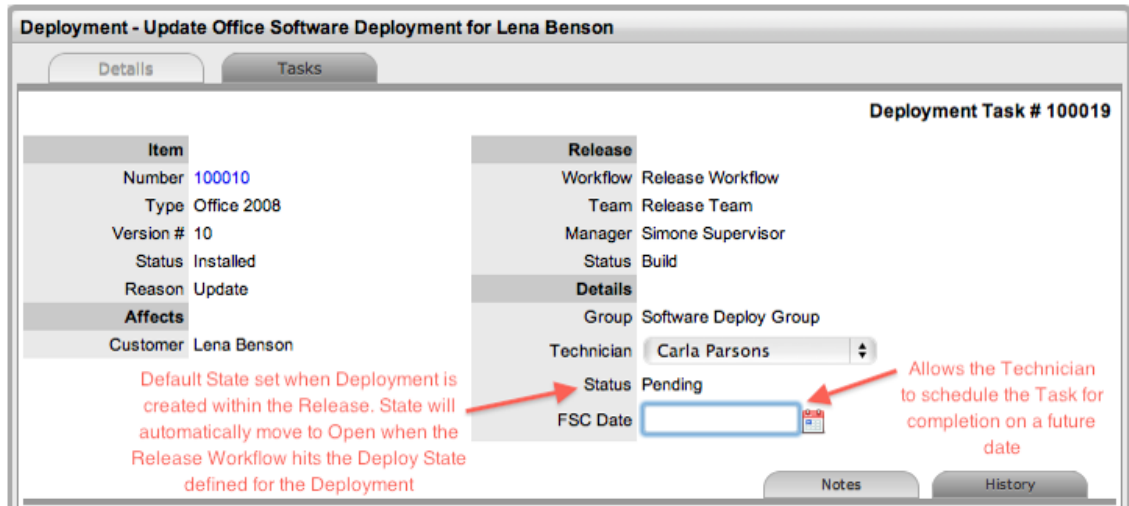


11. For the new installations of Office for customers select  within the Items field
12. Tick the relevant Item Type and define if the Item is to be shared or one created for each Customer
13. Click



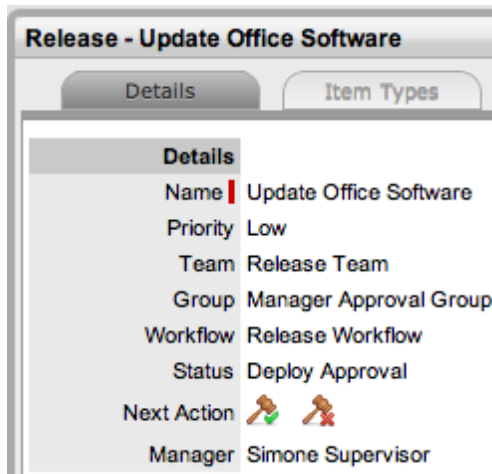
14. Click Done.

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.

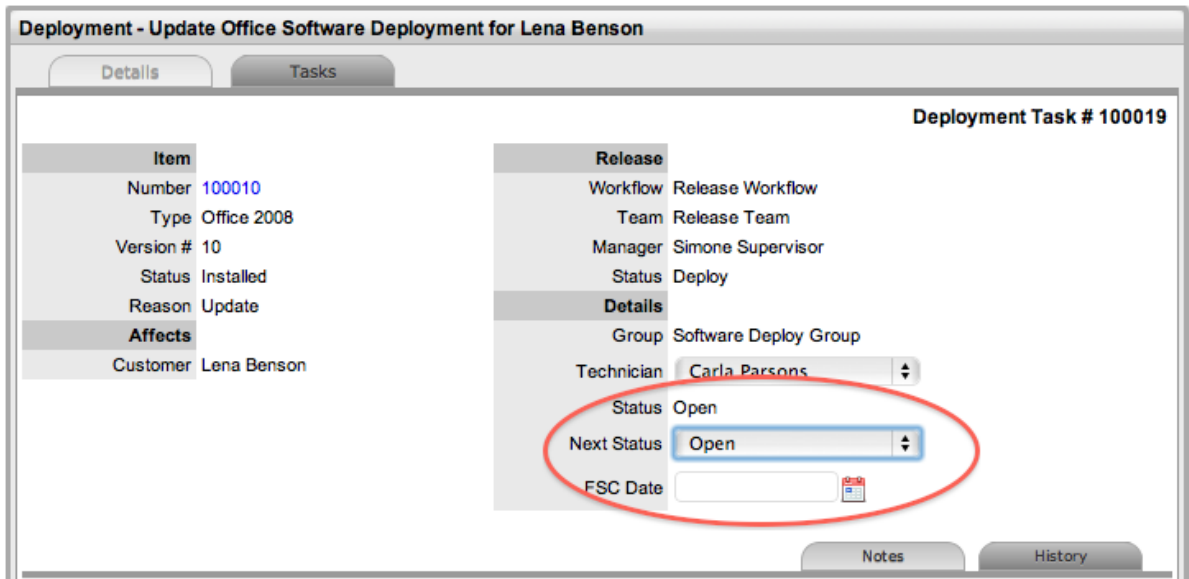


### Action Deployment Tasks

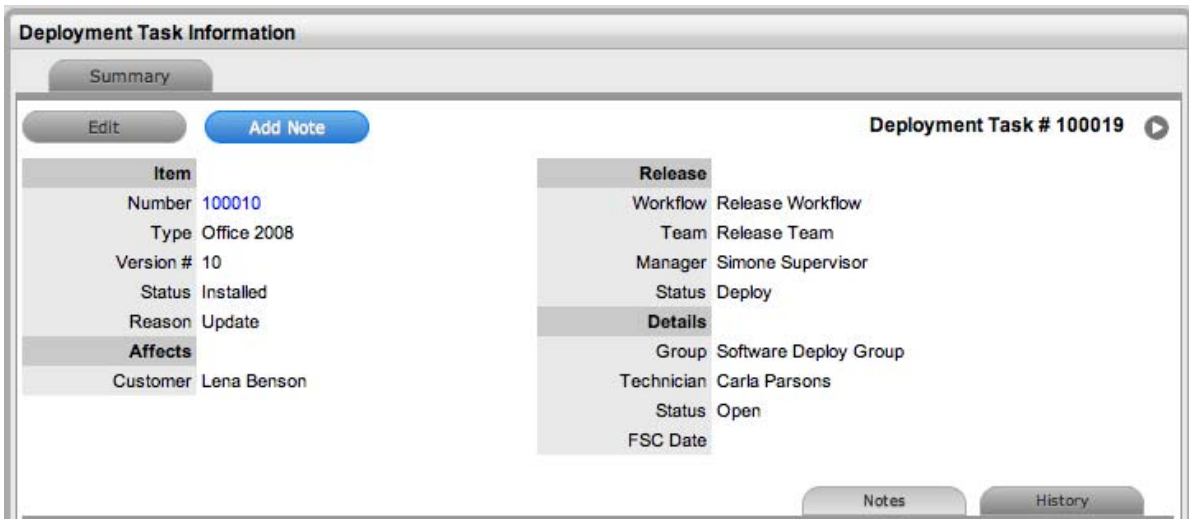
The Deployment activities created within the Deploy tab of the Release are listed in the Deployments and Deployment Tasks tabs of Change in the system. The Release Manager works the Release through the assigned workflow within the Details tab of the Release. When the Status of the Workflow is set to 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, there 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

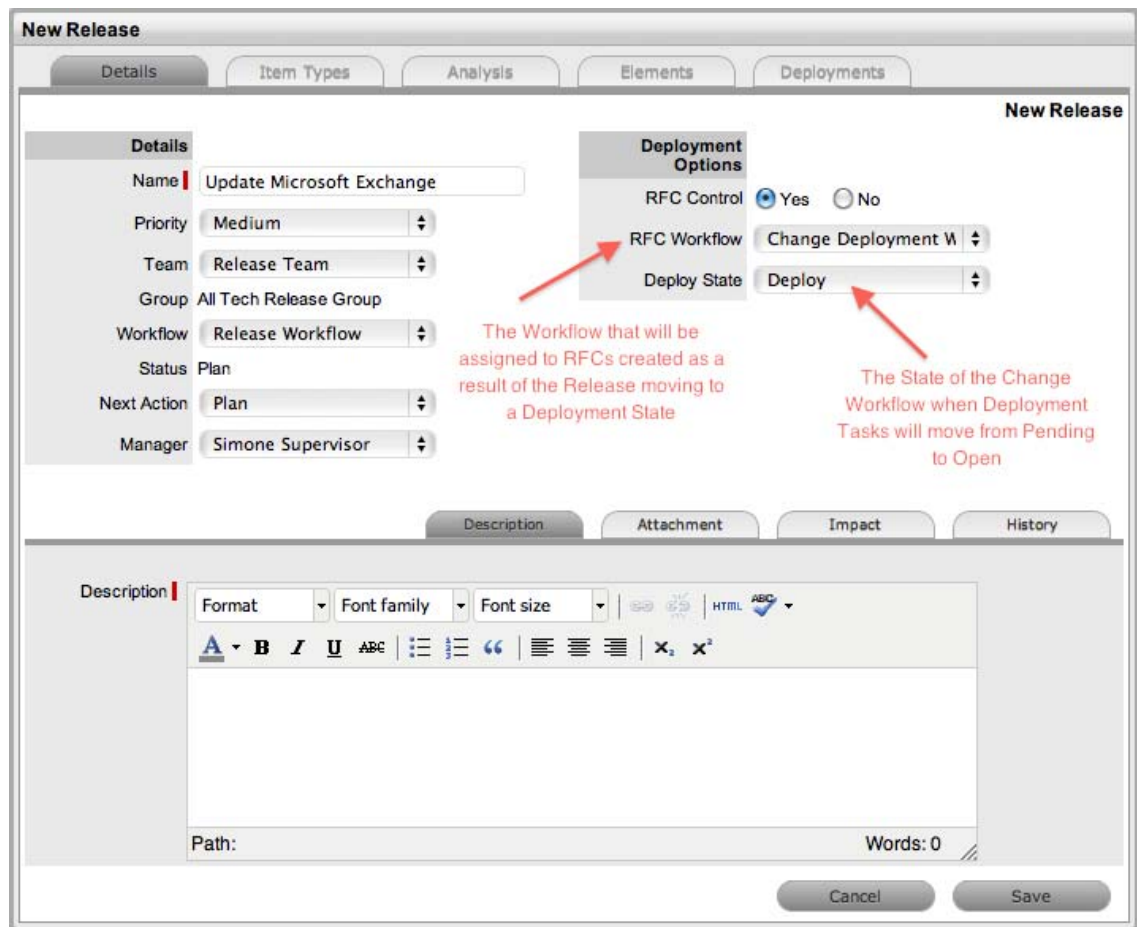
The example will apply the system default Release Workflow that includes an added Workflow State of Trial Deploy and also has a number of Approval States. It includes Deploy and Trial Deploy States, as the stages of the Workflow where the related Change Requests (RFCs) are automatically created for the 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.

The screenshot shows a software interface window titled "Release - Update Microsoft Exchange". It features a tabbed interface with "Item Types" selected. The "Details" section shows "Item Type" as "Exchange", "Reason" as "Update", and "Media Attachment" as an empty dropdown. The "Fields" section contains several input fields: "Location", "Environment", "Version #" (containing "2010"), "License Key", "License Count", "License Expiry", "Ownership", "Order #", "Supplier", and "Supply Date". A search box labeled "Find Item Type (Name)" is located on the right side. At the bottom right, there are "Cancel" and "Save" buttons.

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.

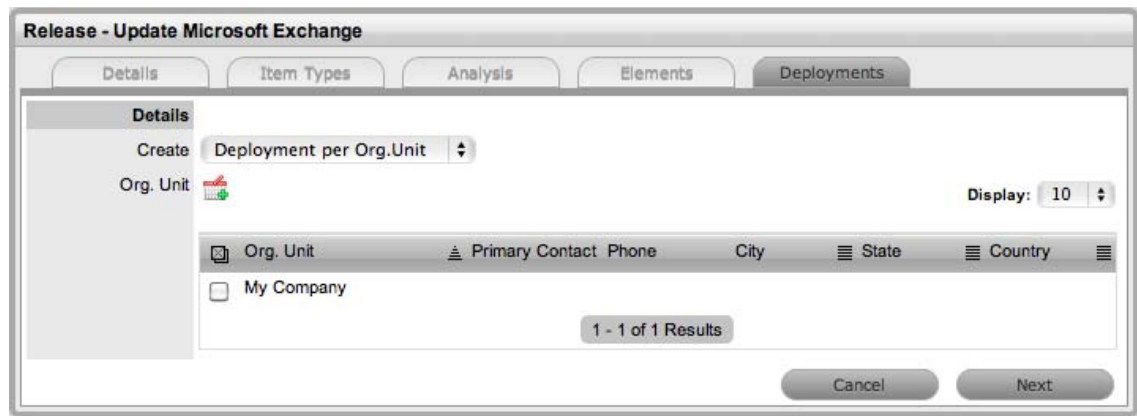
To create the Deployment:

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.

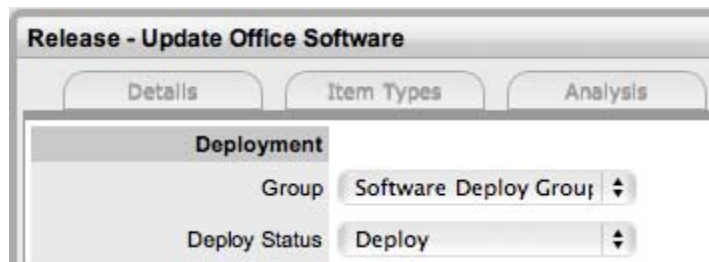


4. Assign the Org. Unit by selecting the field next to the Org. Unit name and clicking

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.

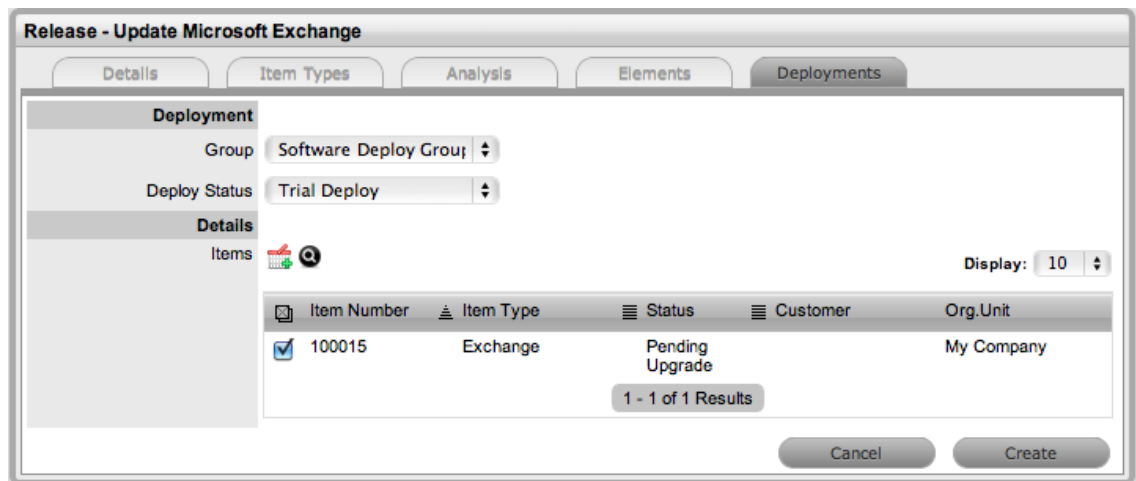


7. Assign the stage of the Workflow where the RFC will be created for the Deployment


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

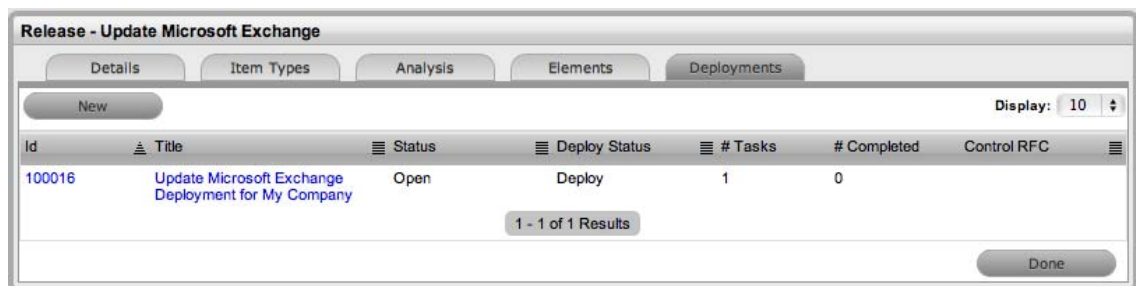
If an Item Type is not displayed in the list, click to search the CMDB.



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

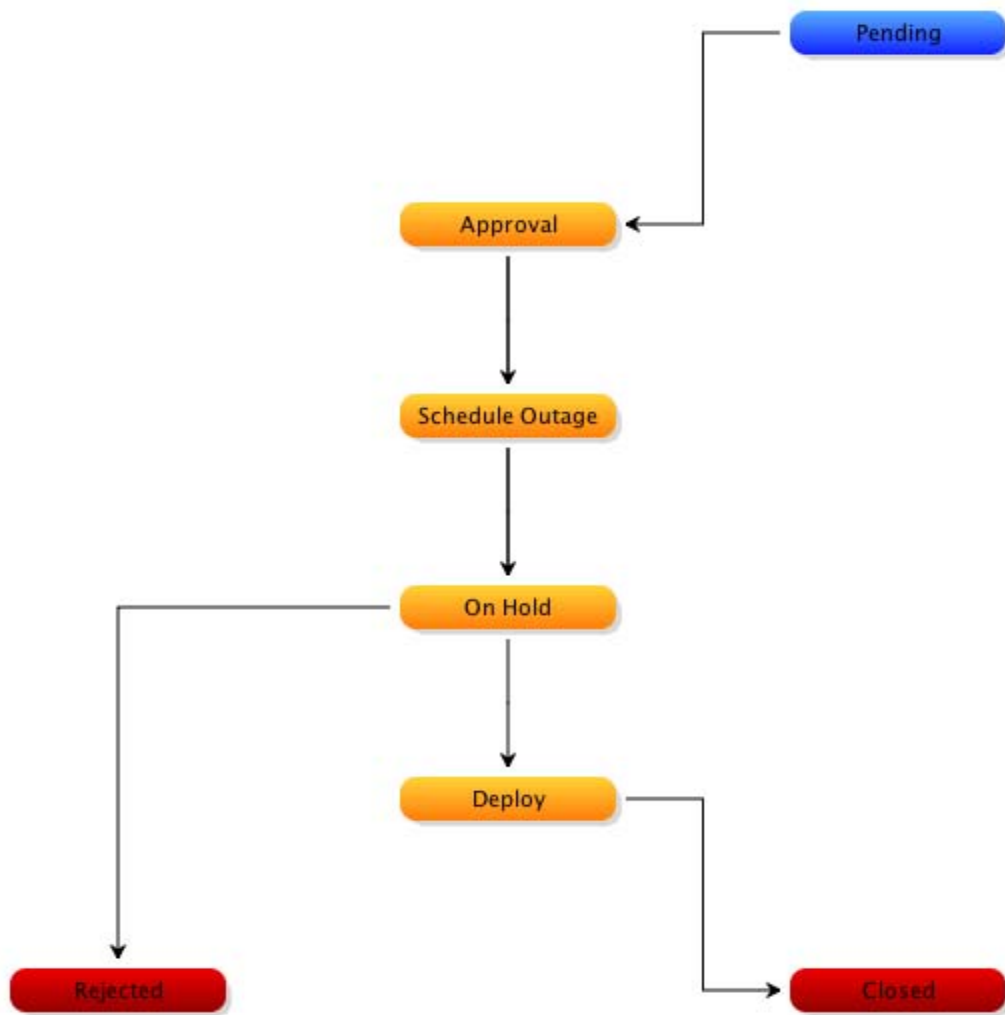
Cancel

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

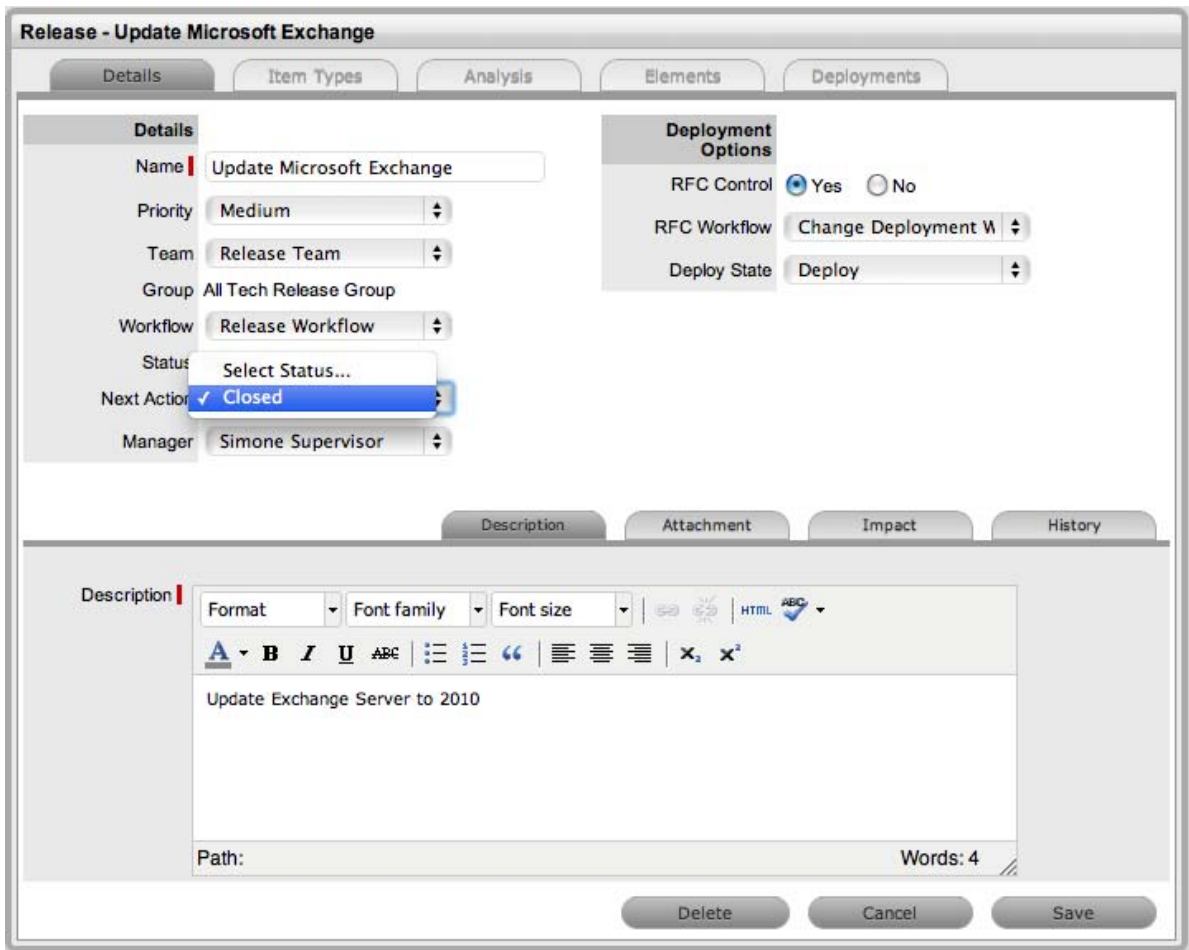
Deploy Status: Deploy

Priority: Medium

Status: Closed - Resolved

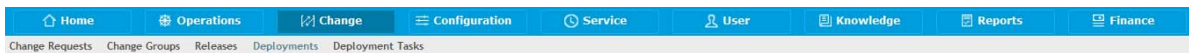
Control RFC: 100025

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

Path:      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.<br><br>If warranted, edit the Name as required.  |
| Release           | Shows the name of the Release associated with the Deployment.  |
| 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.<br><br>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.   |

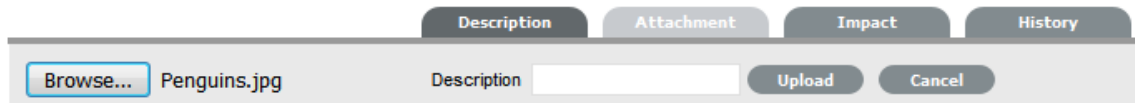
4. Upload any attachments, if relevant
5. Click Save to record changes or Delete to remove the Deployment and erase all related Deployment Tasks.

### **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       |
|--------------------|-------------------|---|--------|----------|----------|
| <a href="#">31</a> | 01/13/16<br>14:47 | Change Request 100078, Change Request 100077 have ... | Open   | Medium   | Sankar R |
| <a href="#">30</a> | 01/13/16<br>14:46 | Change Request 100061 has been removed from the Gr... | Open   | Medium   | Sankar R |
| <a href="#">29</a> | 01/13/16<br>14:42 | Change Request 100079 has been added to the Group     | Open   | Medium   | Sankar R |
| <a href="#">25</a> | 01/12/16<br>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

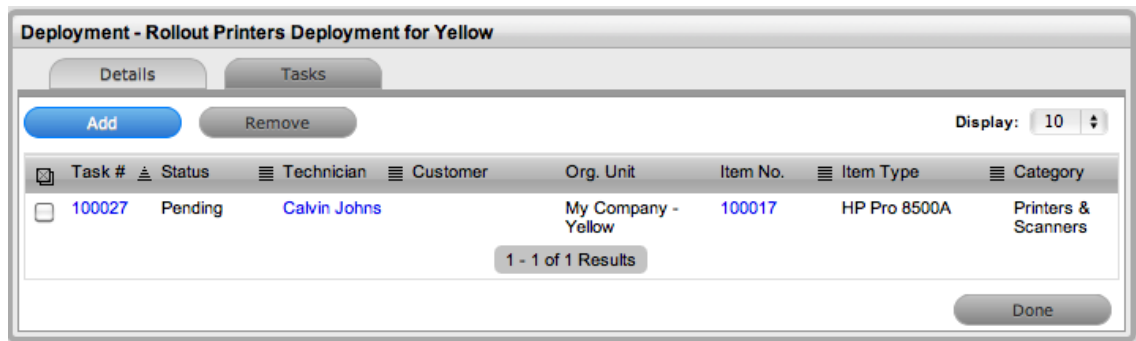
The expanded window is closed.

### Deployment Tasks

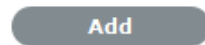
The Tasks tab lists all Deployment activities related to a Deployment. The User can add and remove Tasks within this tab, when the Deployment is not assigned a State that is configured as a Deployment Active State. They can also update the assigned Technician and Status, when the Tasks are in a Deployment Active State, of multiple Tasks by using the Bulk button.

To add Tasks to a Deployment group:

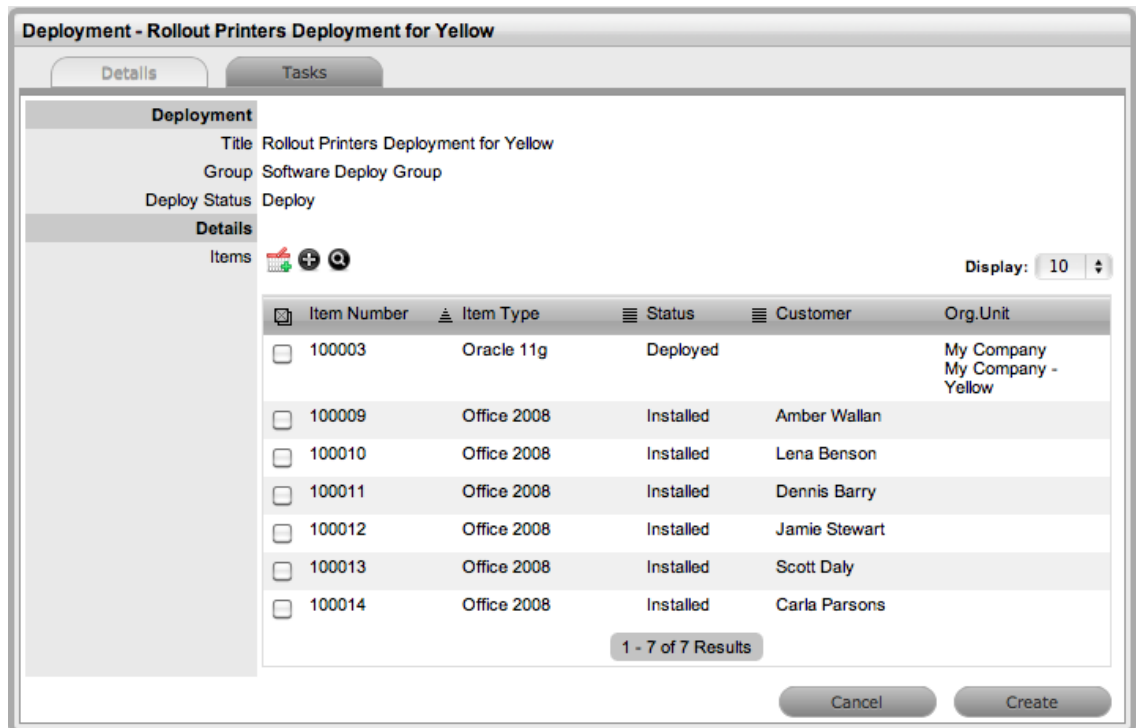
1. Go to Change >Deployments
2. Select the Deployment # link  
The Deployment must not be in a Deployment Active State.
3. Move to the Tasks tab



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.

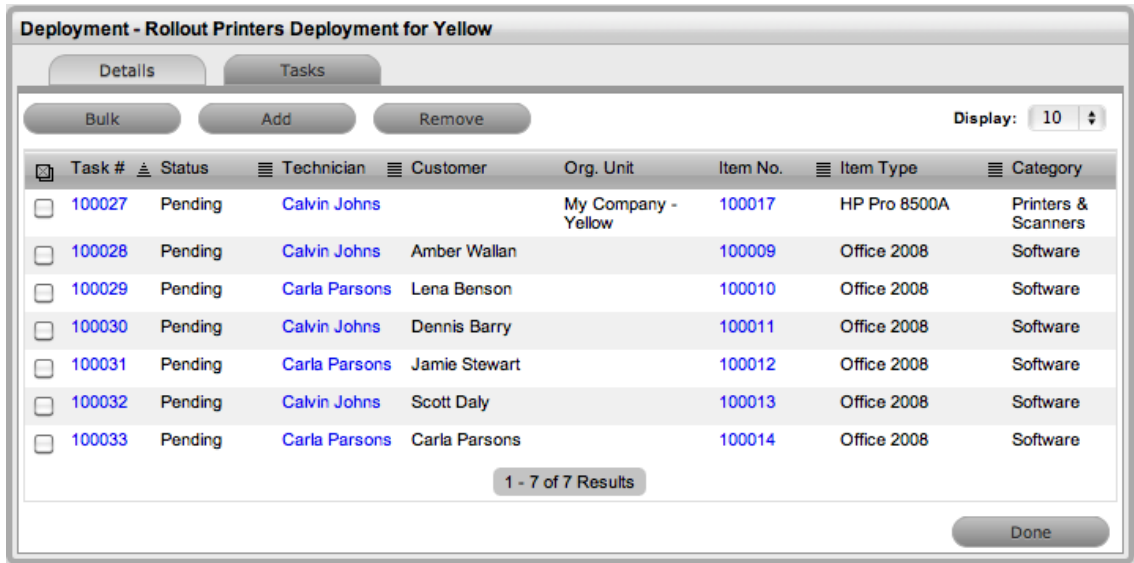
To remove Tasks from a Deployment group:

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

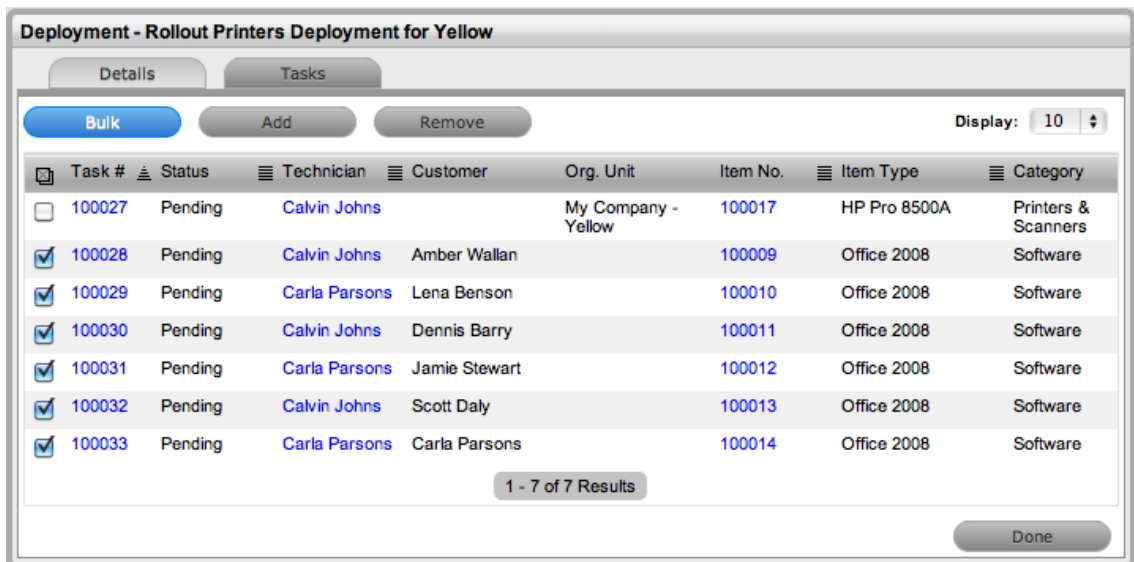
5. Click **Remove**.

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



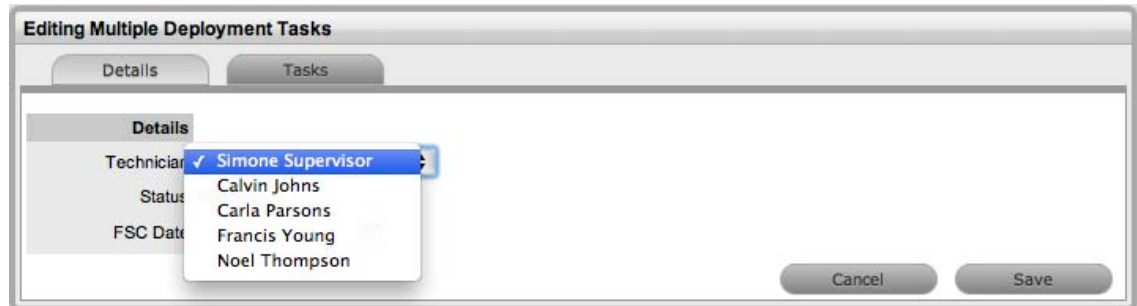
5. Select

## Bulk

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.

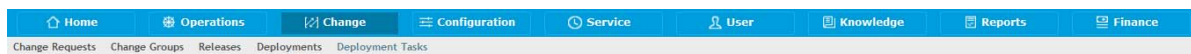


### 7. Click Save.

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' window 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 on the same date and 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:

| <b>Tasks Fields</b> | <b>Description</b>  |
|---------------------|---|
| 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"> <li>1. Pending: Inactive State</li> <li>2. Open: Active and actionable State</li> <li>3. Closed-Resolved: Exit State.</li> </ol> <p>When the Release Workflow is a 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.

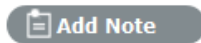
## Notes Tab

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:

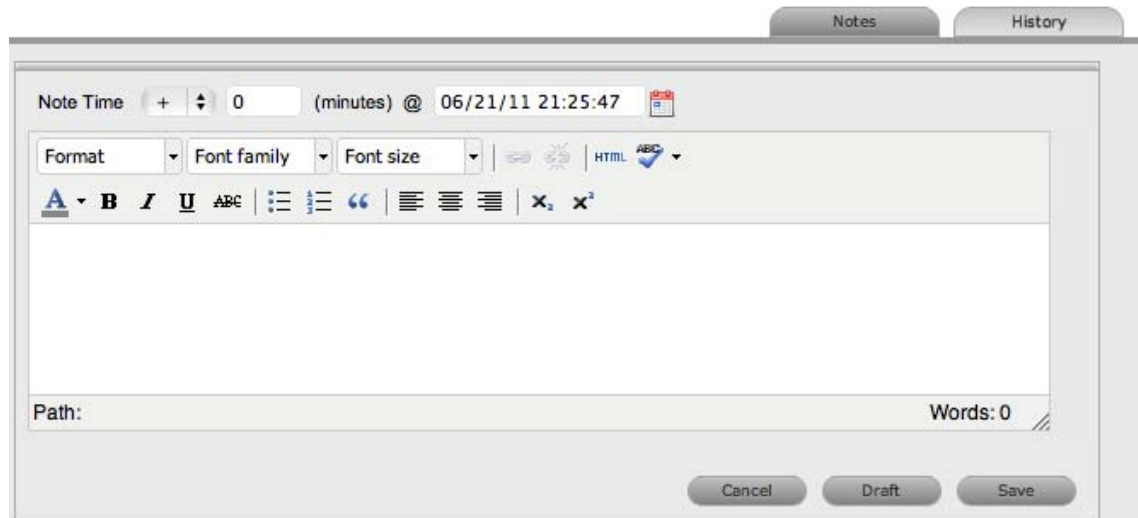
1. Click



The Task opens in Edit mode and the new Note screen is visible

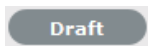
2. Enter the Note details
3. Enter Note Time

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 interface for adding a note. At the top, there are two tabs: "Notes" and "History". Below the tabs is a form with a header section containing "Note Time" with a plus/minus icon, a text input field with "0", "(minutes)", and a date/time field with "06/21/11 21:25:47". Below this is a rich text editor toolbar with options for "Format", "Font family", "Font size", "HTML", and "ABC". The toolbar includes icons for bold, italic, underline, text color, background color, bulleted list, numbered list, quote, indent, outdent, and link. Below the toolbar is a large text area for the note content. At the bottom of the form, there is a "Path:" label and 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 |
|--------------------------------|---------|--------------------------------------|-------------------|------|
| <a href="#">05/04/12 14:17</a> | Open    | Status changed from Pending to Open. | Simone Supervisor |      |
| <a href="#">05/04/12 14:11</a> | 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 550](#)
- ◆ [Section 2.6.2, "Service Portfolio Management," on page 550](#)
- ◆ [Section 2.6.3, "Service Item Costs Tab," on page 555](#)
- ◆ [Section 2.6.4, "Service Catalog," on page 561](#)
- ◆ [Section 2.6.5, "Items Tab," on page 565](#)
- ◆ [Section 2.6.6, "Item Types," on page 589](#)
- ◆ [Section 2.6.7, "Create a Manufacturer," on page 602](#)
- ◆ [Section 2.6.8, "Categories Tab," on page 607](#)
- ◆ [Section 2.6.9, "Vendors," on page 631](#)
- ◆ [Section 2.6.10, "Manufacturers," on page 633](#)
- ◆ [Section 2.6.11, "Outages," on page 635](#)
- ◆ [Section 2.6.12, "AMIE Snapshots," on page 640](#)

## 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. |

| Filter            | Relationship  |
|-------------------|---|
| 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. |

|                      | Description  |
|----------------------|--|
| 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.<br><br>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.  |
| 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.   |

6. Continue to configure the Category like any other Category and Save
7. Within the Configuration > Types tab, create an Item Type using the Service Category.
8. 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.

9. 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.  |
| 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 <a href="#">Service Item Costs tab</a> 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 <a href="#">Service Item Type Costs tab</a> 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.                              |

---

---

| <b>Charges</b>   |  |
|------------------|--|
| Revenue          |  |
| Month to Date    | Uses the Charges figure, multiplied with 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 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.                    |
| 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:

---

| <b>Financial</b> | <b>Description</b>   |
|------------------|--|
| 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><b>NOTE:</b> Typically for Service Items, the infrastructure costs would be zero as this would be derived from the associated Parent Items.</p> |

---

| <b>Financial</b>  | <b>Description</b>  |
|-------------------|---|
| 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.  |
| Usage Unit Cost   | 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.  |
| 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.          |
| Charges           |   |
| Price (per user)  | Draws the figure from the <a href="#">Service Item Type Costs tab</a> 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.  |



| Financial         | Description  |
|-------------------|--|
| 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.   |
| 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   | 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 moved to an offline State.   |

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       |   | Availability     |                          |
| Purchase Date         |   | Avg Repair Time  | N/A                      |
| Depreciate Over       | years   | Avg Time To Fail | 44 Days, 22 Hrs, 24 Mins |
| Depreciated Value     | \$0.00  |                  |                          |
| Audit Date (mm/dd/yy) |   |                  |                          |
| PO Number             |   |                  |                          |
| 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        | <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

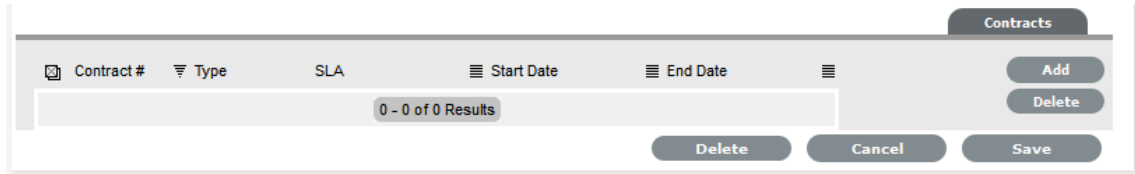
Through the Item Costs tab, Contracts with an associated Invoice Number (if relevant) can be generated for an Item, after it has been logged in the system.

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



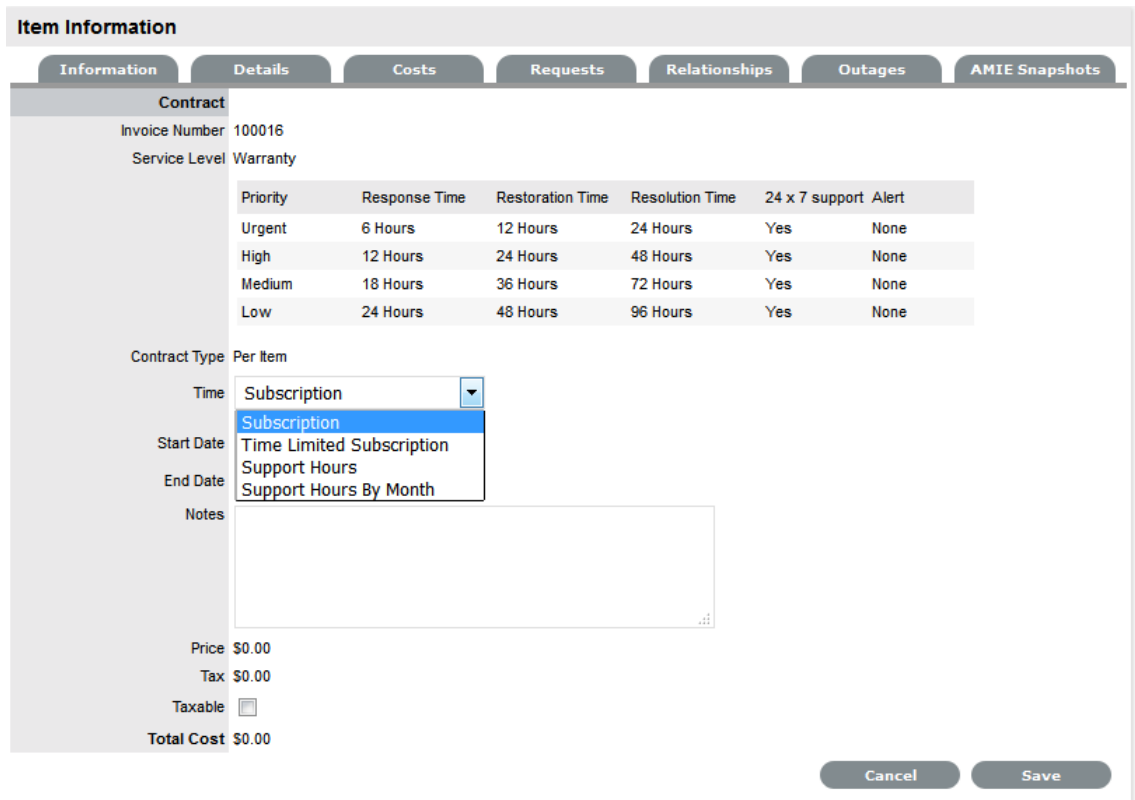
4. Click Add

(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:

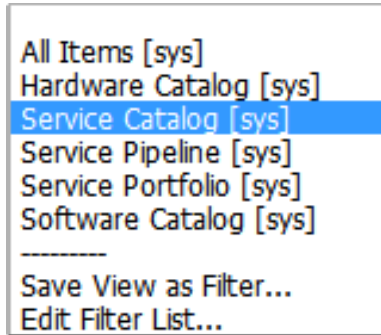
- ◆ Email
- ◆ Network Monitoring
- ◆ Security
- ◆ Video Conference
- ◆ Remote Access
- ◆ Mobile Communications (Cell Phones/PDAs)
- ◆ Wireless
- ◆ Laptop Computing
- ◆ Desktop Computing
- ◆ File Sharing
- ◆ Printing/Scanning

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.

My Services Service Catalog

Service # Microfocus - eLearning

Properties Create



Category Service

Type Website Services

Status Offline

Service Level Warranty

| Service Level Targets | Priority | Response Time | Restoration Time | Resolution Time | 24 x 7 support |
|-----------------------|----------|---------------|------------------|-----------------|----------------|
|                       | Urgent   | 6 Hours       | 12 Hours         | 24 Hours        | Yes            |
|                       | High     | 12 Hours      | 24 Hours         | 48 Hours        | Yes            |
|                       | Medium   | 18 Hours      | 36 Hours         | 72 Hours        | Yes            |
|                       | Low      | 24 Hours      | 48 Hours         | 96 Hours        | Yes            |

Edit Cancel

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.

The screenshot shows the 'Item Information' interface with the 'Details' tab selected. The 'Description' field is the primary focus, containing the text 'Description entered here is displayed in the customer portal.' The interface includes various tabs and buttons for managing the item's details.

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

The screenshot shows the 'Item Information' interface for item # srm-tst-nsd-223 (Dell Latitude E6430). The 'Relationships' tab is active. A dropdown menu for 'Direction' is set to 'Parent - Child'. A table lists three relationships where 'Dell Latitude E6430' is the parent of 'Windows Bundle' items. The table has columns for Current Item, Relationship, Related Item, Item #, Identifier, and Category. At the bottom, there are 'Cancel' and 'Delete' buttons.

| Current Item        | Relationship   | Related Item   | Item #         | Identifier | Category        |
|---------------------|----------------|----------------|----------------|------------|-----------------|
| Dell Latitude E6430 | is a parent of | Windows Bundle | Notepad++      |            | ZENworks Bundle |
| Dell Latitude E6430 | is a parent of | Windows Bundle | Firefox 1.0    |            | ZENworks Bundle |
| Dell Latitude E6430 | is a parent of | Windows Bundle | Microsoft 2010 |            | ZENworks Bundle |

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 565](#)
- ♦ [“Bulk Item Update” on page 567](#)
- ♦ [“Item Information” on page 569](#)

## Items

The screenshot shows the navigation bar with the following tabs: Home, Operations, Change, Configuration, Service, User, Knowledge, Reports, Finance. Below the tabs, the 'Items' tab is selected, and the sub-menu items 'Types', 'Categories', 'Vendors', 'Manufacturers', 'Outages', and 'AMIE Snapshots' are visible.

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"> <li>◆ Per Item</li> <li>◆ Per Customer</li> <li>◆ Per Request</li> <li>◆ Per Organizational Unit.</li> </ul>                |
| 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:

| <b>Filter</b>     | <b>Relationship</b>   |
|-------------------|---|
| 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:

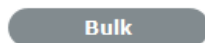
1. Go to Configuration > Items

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"/> smm-isl-nsd-09485caa | Hardware      | Del Latitude E6430 | Warranty      | Gunprasad S    |            | Deployed        |           | Device-Incident Team | Problem Analysis Team | Change Management Team | Service Request Team |
| <input type="checkbox"/> smm-isl-nsd-223                 | Hardware      | Del Latitude E6430 | Warranty      | Sachin Kumar   |            | Pending Upgrade |           | Device-Incident Team | Problem Analysis Team | Change Management Team | Service Request Team |
| <input checked="" type="checkbox"/> smm-isl-nsd-322      | Hardware      | Del Latitude E6430 | Warranty      | Jason Blackett |            | Deployed        |           | Device-Incident Team | Problem Analysis Team | Change Management Team | Service Request Team |
| <input checked="" type="checkbox"/> smm-isl-nsd-125      | Hardware      | Del 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: [ ]

Org. Units: [ ]


Find Customer (Last Name): [ ]

Find Org. Unit (Name): [ ]


Delete Cancel Save

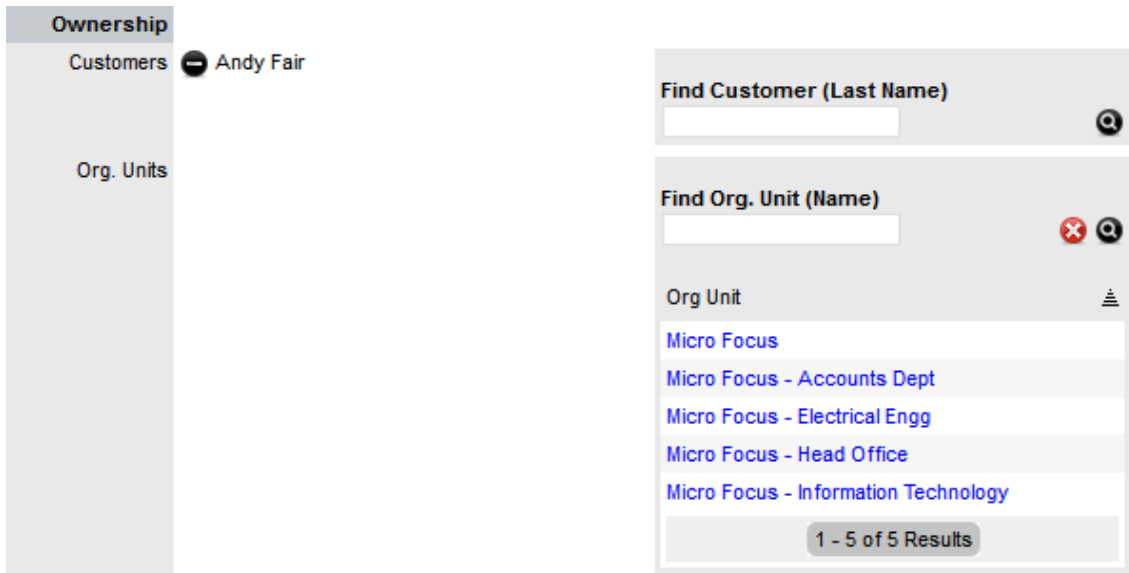
4. Amend the relevant Details

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.

- For Items that require Ownership adjustments, click  next to the Owner details if the relationship is to be deleted



- 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.



- Click on the relevant new owner link within the Find box to add the owner
- 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:

- Select Configuration > Items
- Click New


The Item Information screen appears


**Item Information**


Information Details Costs Requests Relationships Outages AMIE Snapshots


Number


Category


Type  **Find Item Type (Name)**  


Request Team  

Incident Team  

Problem Team  

Change Team  

Criticality  


Service Level  


**Ownership**

Customers Everybody

Org. Units All

Affects **13 Users**

**Find Customer (Last Name)**  

**Find Org. Unit (Name)**  

\*Denotes mandatory fields.

| Item         | Description  |
|--------------|--|
| Item Number* | <p>If the Administrator has set the Item Numbers Editable option in Setup&gt; Privileges&gt; 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.   |

| Item          | Description  |
|---------------|--|
| 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     | <p data-bbox="894 722 1438 842">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 data-bbox="915 863 1422 1058" style="list-style-type: none"> <li data-bbox="915 863 1422 953">1. Enter a Customer last name, or leave blank then click the Search button to view a list of all available Customers.</li> <li data-bbox="915 974 1422 1058">2. Click on the hyperlink for the relevant Customer name or names to assign them to the Item.</li> </ol> <p data-bbox="894 1079 1438 1142">If no specific Customer is allocated to the Item, it becomes a Global Item and is assigned to Everyone.</p>  |
| Customers     |  |
| Org Units     | <p data-bbox="894 1169 1438 1260">These are the Org Units who own the Item. The Item can be assigned to one or multiple Organizational Units.</p> <p data-bbox="894 1287 1127 1314">To assign an Org Unit:</p> <ol data-bbox="915 1335 1422 1530" style="list-style-type: none"> <li data-bbox="915 1335 1422 1425">1. Enter an Org Unit name, or leave blank then click the Search button to view a list of available Org Units.</li> <li data-bbox="915 1446 1422 1530">2. Click on the hyperlink for the relevant Org Unit name or names to assign them to the Item.</li> </ol> <p data-bbox="951 1551 1438 1696"><b>NOTE:</b> 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  |  |

| Item   | Description  |
|--------|--|
| Method | 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. |

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.

The screenshot shows the 'Org. Unit Information' form with the 'Details' tab selected. The form is divided into several sections:

- Information:** Contains input fields for Name (My Company), Org. Unit Type (Company), Org. Unit Code, Address 1, Address 2, City, Zip, Country, Phone, URL, and Email.
- Handshaking:** Includes an 'Override' section with radio buttons for 'Yes' and 'No' (selected).
- Partner:** Includes a 'Customer of' dropdown menu.
- Buttons:** 'Cancel' and 'Save' buttons are located at the bottom right.

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.

## 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.

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).

---

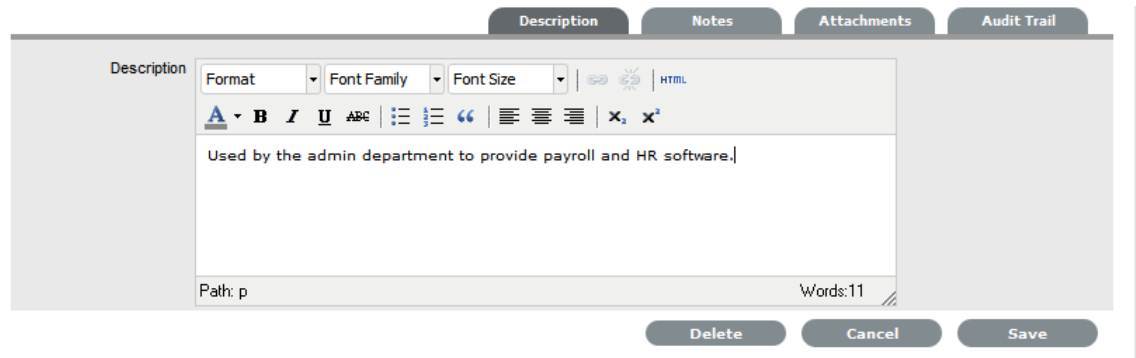
### *Item Description*

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



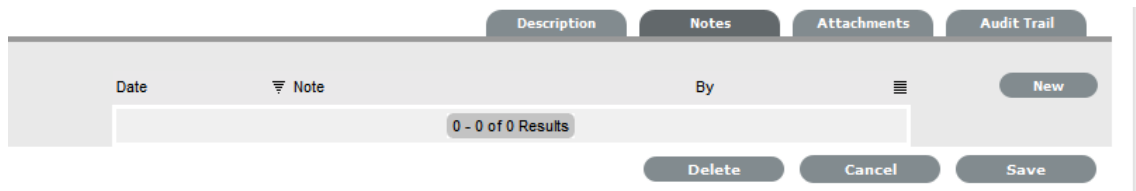
The screenshot shows the 'Description' tab of an item's details. At the top, there are four tabs: 'Description', 'Notes', 'Attachments', and 'Audit Trail'. The 'Description' tab is active. Below the tabs is a rich text editor with a toolbar containing options for Format, Font Family, Font Size, Bold, Italic, Underline, ABC, Bulleted List, Numbered List, Quote, Indent, Outdent, Link, and Unlink. The text area contains the text 'Used by the admin department to provide payroll and HR software.' Below the text area, it shows 'Path: p' and 'Words:11'. At the bottom right, there are three buttons: 'Delete', 'Cancel', and 'Save'.

4. Click Save.

### **Item Notes**

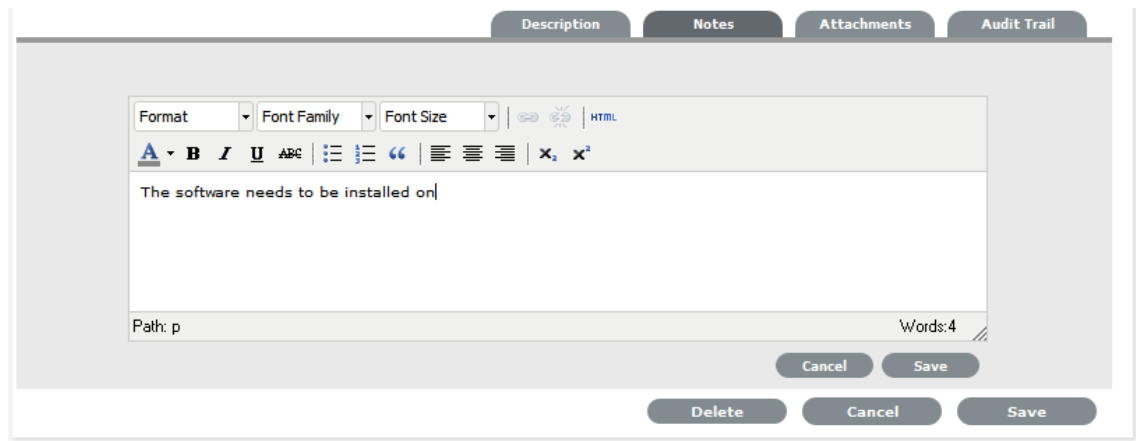
To add Notes to an Item, under the Item's Details tab:

1. Click Edit
2. Select the Notes tab



The screenshot shows the 'Notes' tab of an item's details. At the top, there are four tabs: 'Description', 'Notes', 'Attachments', and 'Audit Trail'. The 'Notes' tab is active. Below the tabs is a table with columns for 'Date', 'Note', and 'By'. There is a 'New' button on the right. Below the table, it shows '0 - 0 of 0 Results'. At the bottom right, there are three buttons: 'Delete', 'Cancel', and 'Save'.

3. Click New
4. Enter details in the Notes field



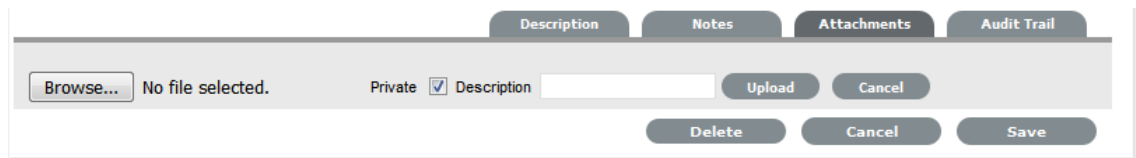
5. Click Save.

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.

| Description |                |   |          | Notes | Attachments | Audit Trail |
|-------------|----------------|---|----------|-------|-------------|-------------|
| 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

### **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.

**Item Information**

Information Details **Costs** Requests Relationships

Edit Duplicate Print Item # 100005 (Server)

**Financial**

Cost \$0.00  
 Monthly Cost \$0.00  
 Purchase Date 08/01/10 19:03  
 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](#)

**Warranty**

Expires

**Availability**

Avg Repair Time N/A  
 Avg Time To Fail N/A

Done

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.               |

| <b>Financial</b>  | <b>Description</b>  |
|-------------------|---|
| 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:

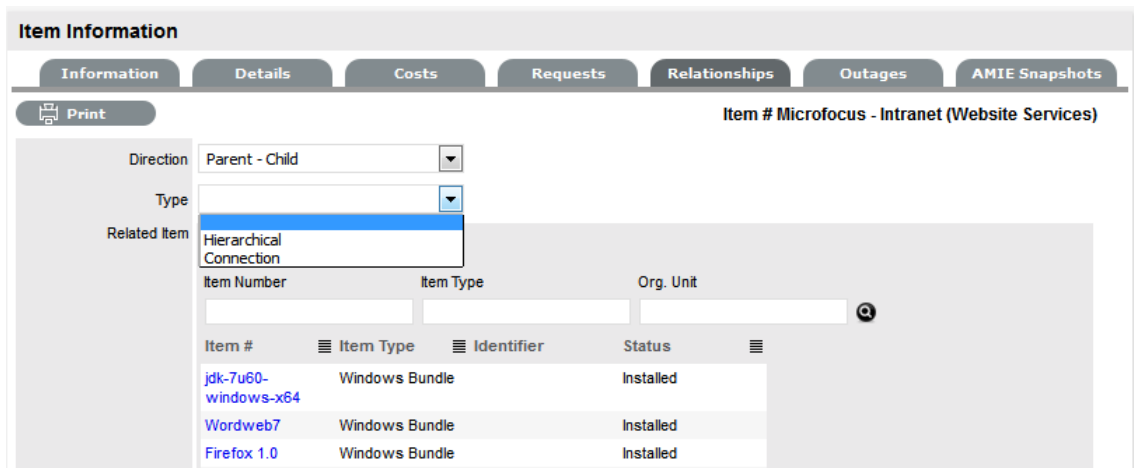
- ◆ Hierarchical Relationship
- ◆ Connection - an association between the selected Items

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



**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**

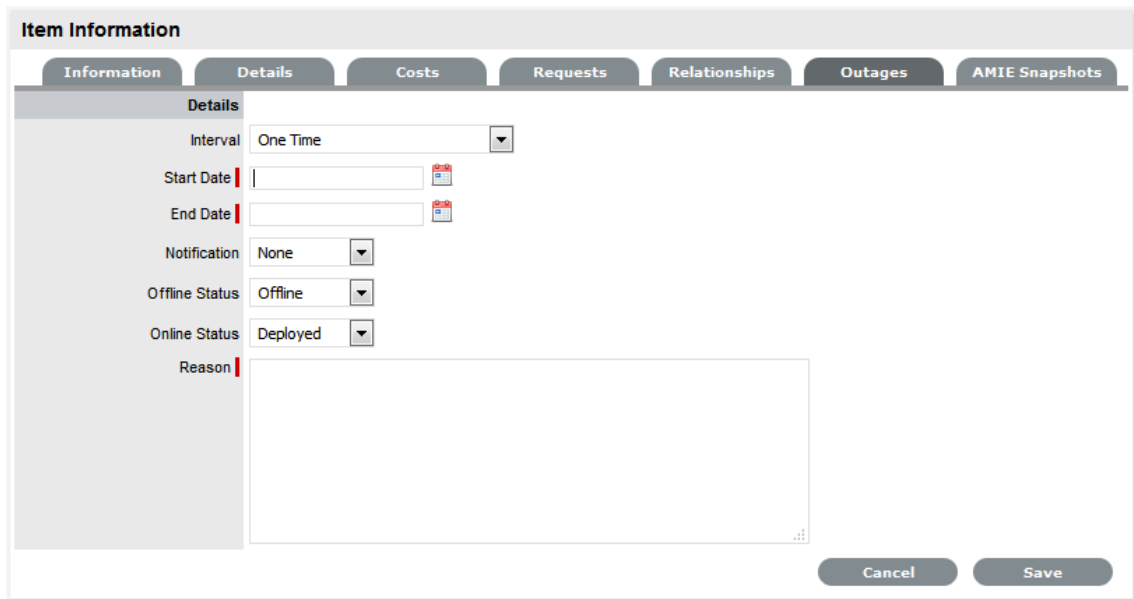
To create an Outage:

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

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| 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.   |

---

---

## Planned Outages

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|              |  |
|--------------|--|
| 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     | <p>This option is displayed when a Notification is set for the Outage.</p> <p>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.</p> |
| 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 the text '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.

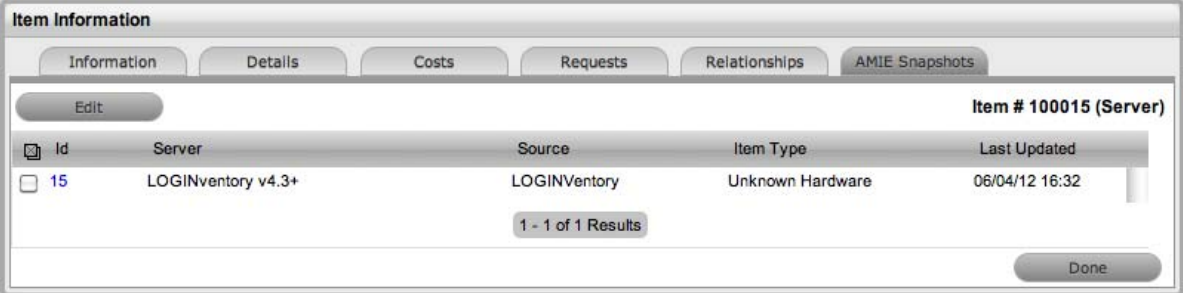
To view the details of the Outage, select the Outage No. link in the Outage List View.



## 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.



The screenshot shows the 'Item Information' window with the 'AMIE Snapshots' tab selected. The window title is 'Item # 100015 (Server)'. Below the title bar are tabs for 'Information', 'Details', 'Costs', 'Requests', 'Relationships', and 'AMIE Snapshots'. An 'Edit' button is visible. The main content area contains a table with the following data:

| Id                          | Server             | Source       | Item Type        | Last Updated   |
|-----------------------------|--------------------|--------------|------------------|----------------|
| <input type="checkbox"/> 15 | LOGINventory v4.3+ | LOGINventory | Unknown Hardware | 06/04/12 16:32 |

Below the table, it says '1 - 1 of 1 Results'. A 'Done' button is located at the bottom right of the window.

### 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 CMDB, 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 590](#)
- ◆ [“SLAs and Item Types” on page 593](#)
- ◆ [“Classification” on page 594](#)
- ◆ [“Items” on page 596](#)
- ◆ [“Requests” on page 596](#)
- ◆ [“Costs” on page 597](#)
- ◆ [“Fields” on page 598](#)
- ◆ [“Responses” on page 600](#)

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.

| Item Type          | Item Category | Manufacturer | Service Level | Incident Team        | Problem Team          | Change Team            | Request Team         | Criticality | Identifier |
|--------------------|---------------|--------------|---------------|----------------------|-----------------------|------------------------|----------------------|-------------|------------|
| Del Latitude E6430 | Hardware      | VMware, Inc. |               | Device-Incident Team | Problem Analysis Team | Change Management Team | Service Request Team |             |            |
| Email Services     | Service       | Novell       |               | Device-Incident Team | Problem Analysis Team | Change Management Team | Service Request Team | High        | Type       |
| Iphone 6           | BYOD Devices  | Apple        |               | Device-Incident Team | Problem Analysis Team | Change Management Team | Service Request Team | Moderate    | Mobile No  |
| Service Desk       | Service       | Novell       |               | Device-Incident Team |                       |                        |                      |             |            |
| WFI Service        | Service       | Novell       |               | Device-Incident Team | Problem Analysis Team | Change Management Team | Service Request Team |             | Type       |

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.

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.

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**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

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
**Item Type**

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|               |  |
|---------------|--|
| 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&gt;CMS&gt;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&gt;Privileges&gt;System.</p> |

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| Item Type        |  |
|------------------|--|
| 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  or 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.  |
| 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         | 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.)   |
| Ignore Share     | 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.  |
| Add Forum Topic  | Create a forum topic using the Item Type Name. This option is only displayed when a new Type is being created.   |
| Incident Default | The Team of Technicians assigned to support Incidents received related to the Item Type.   |
| Problem Default  | The Team of Technicians assigned to support Problems received related to the Item Type.  |
| Change Default   | The Team of Technicians assigned to support Change Requests received related to the Item Type.   |
| Request Default  | The Team of Technicians assigned to support Service Requests received related to the Item Type.  |

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## Item Type

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Service Level Default

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.

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.

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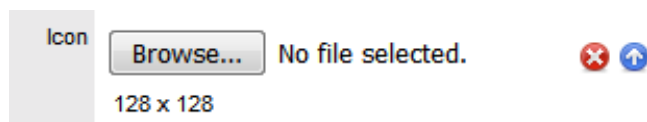
7. Enter the Unit Price for the Item Type. This is an optional field that is used for asset management

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.



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**NOTE:** The dimensions of the uploaded icon must be exactly 128 x 128 pixels

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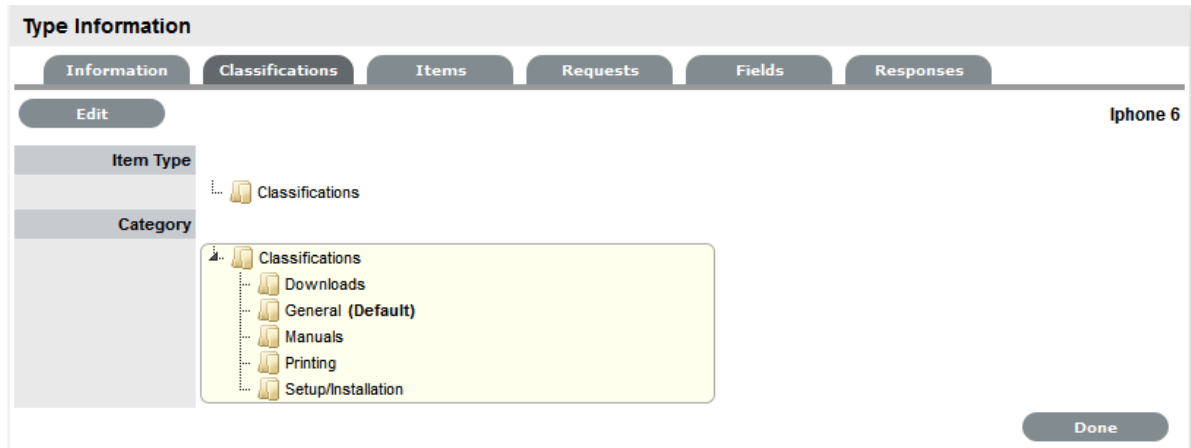
13. Move to the Classification tab to create classifications for issues related to Item of this Item Type.

## 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

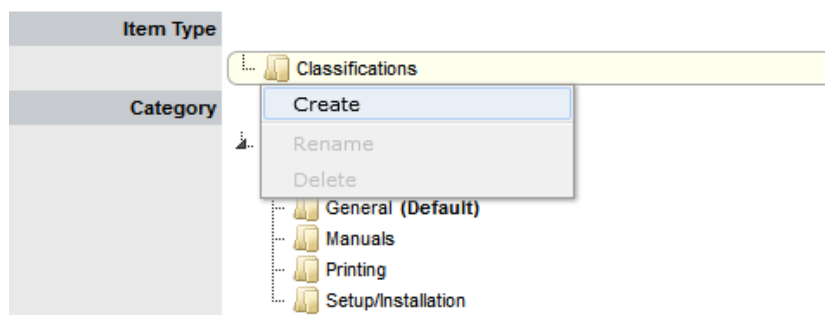
Category Classifications are used as generic problem classification for sorting requests. These are refined within the Item Type Classification to make them more relevant to the actual Item Type. For example, the Item Type category Hardware needs the Category Classification to be refined differently for hardware Item Types such as desktops and servers. To refine the problem types, Item Type Classifications are used.



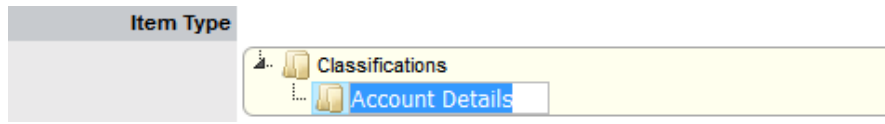
### Editing an Item Type Classification listing

To edit the Item Type Classification entry:

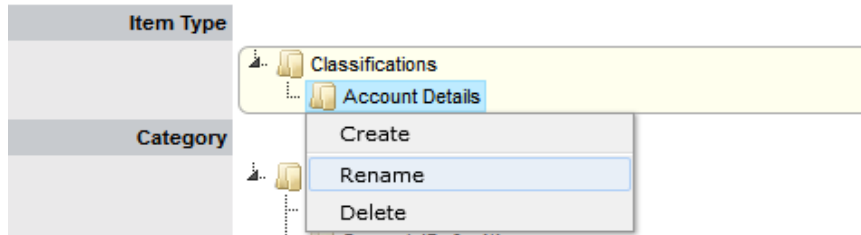
1. Within the Item Type>Classification tab
2. Select Edit
  - A New button is displayed within the Item Type Classification section.
3. Right-click on the Classifications link
  - The Create option is displayed.



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



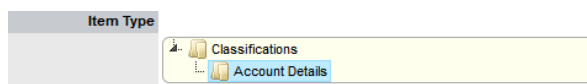
8. Select the Rename option  
The field opens in edit mode
9. Change the details
10. Click outside the text field to save the changes
11. Repeat the above process to create all required list entries
12. Move existing Classifications to a new position, if required  
Highlight the entry, then drag and drop the entry into its new location.
13. Click Save.

### Creating Sub-Classifications

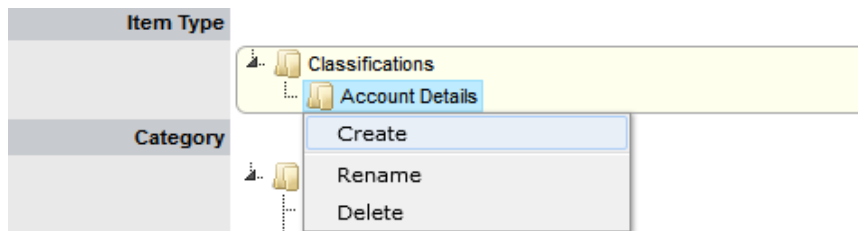
Classifications can be expanded to include sub-categories.

To create sub-classifications:

1. Select the relevant Classification header  
The Classification header is highlighted.

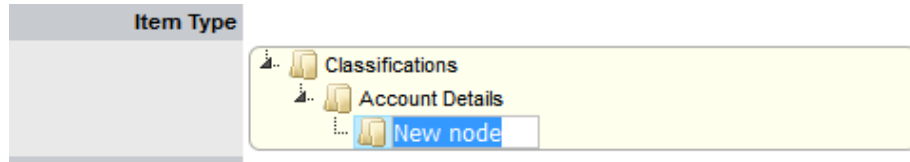


2. Right-click the Classification Entry  
The Create, Rename and Delete options are displayed



3. Click Create

- Complete the details of the new node



- Click away from the text field to save the change
- 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

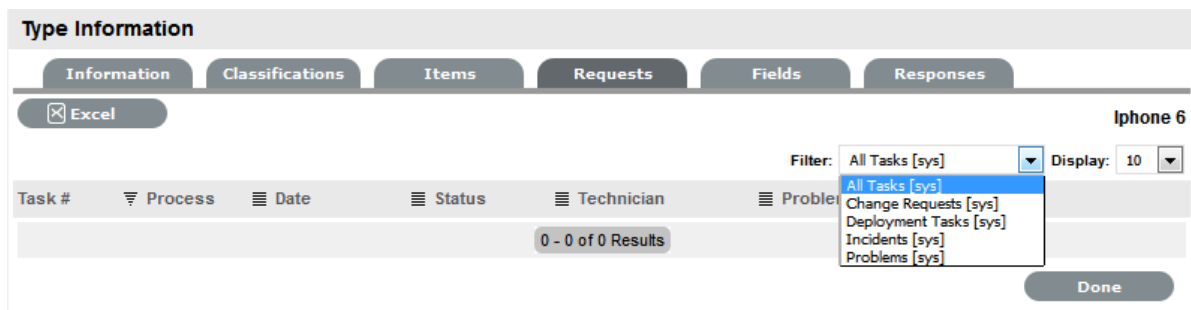
The Items tab lists the Items created using this Item Type. Individual Item details can be viewed by clicking on an Item Number. The list of Items can be exported using the Excel button.



## 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.





## 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.

The screenshot shows the 'Type Information' window with the 'Costs' tab selected. The 'Forecast Costs' section includes: Capital \$12,000.00, Recovery 5 years, and Recurring 400.0 p.c.m. The 'Actual Costs' section includes: Capital \$12,000.00 and Recurring 150.0 p.c.m. The 'Services' table is as follows:

| 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      |

### 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 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.

**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.

### Actual Costs

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## Forecast Costs

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|           |   |
|-----------|---|
| 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 |
| <a href="#">Access Enabled?</a> | Boolean         | Yes/No | ✓        |          | ✓                | ✓                 | No            |
| <a href="#">Type Custom 2</a>   | String          | Text   |          |          | ✓                | ✓                 |               |
| <a href="#">Type Custom 3</a>   | String          | Text   |          |          | ✓                | ✓                 |               |
| <a href="#">Type Custom 4</a>   | String          | Text   |          |          | ✓                | ✓                 |               |
| <a href="#">Type Custom 5</a>   | String          | Text   |          |          | ✓                | ✓                 |               |

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

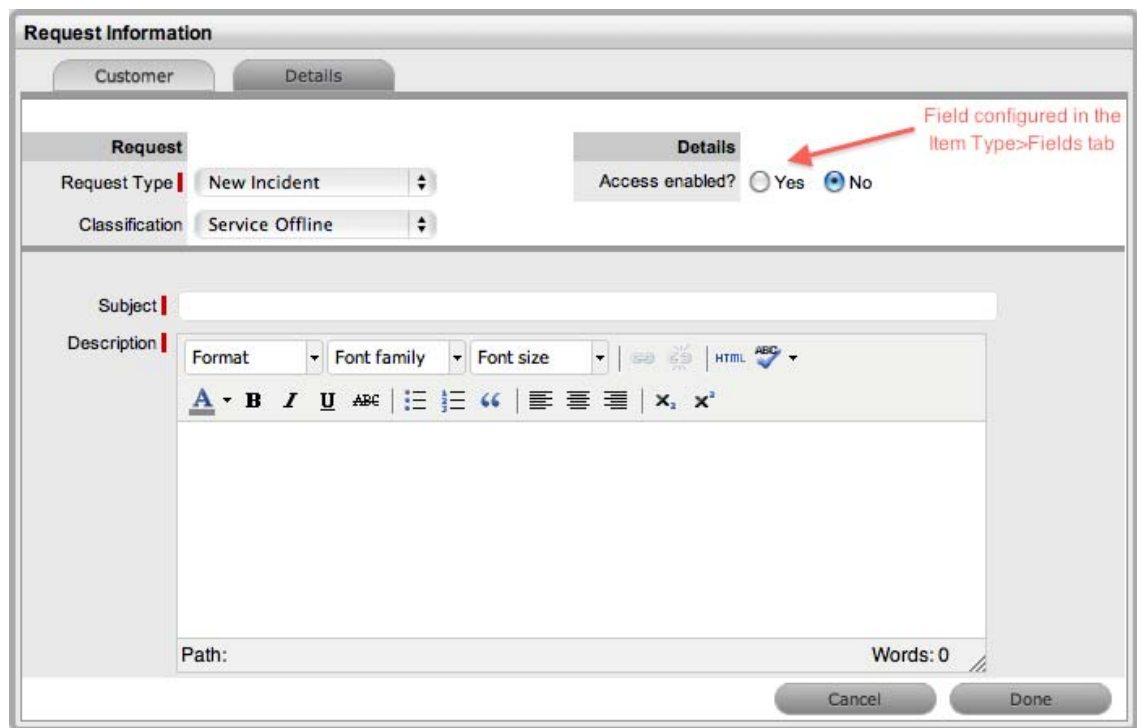
4. Click Yes to activate the Field
5. Complete the following details:

| 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.<br><br>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"> <li>◆ String - List or Free Text</li> <li>◆ Number</li> <li>◆ Boolean - radio buttons for Yes/No and True/False</li> <li>◆ Date - creates a date field</li> <li>◆ Currency- creates a currency field</li> <li>◆ Hyperlink.</li> </ul> |
| Style             | States the style of the field.<br><br>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 is the field is expected to capture. These details are accessible next to the custom field on the relevant screen.</p>  |

6. Click Save.

The active Field will now be available during the request creation process, for all Items that use the Item Type.



## 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:

**Add Note** [Close]

Note Time + 0 (Minutes) 01/20/16 10:22 [Calendar] [Refresh] [HTML] Select a template...

Format Font Family Font Size [Link] [Unlink] [HTML]

**A** **B** *I* U ABC [List] [List] [Quote] [Indent] [Outdent] [Link] [Unlink]

----- Initial Description -----  
Change Request - Item has been marked for creation

Path: p Words:10

Attachments [Dropdown] [+/-]

Visibility  Private  Public  
Create Knowledge  Yes  No

**Solution** **Draft** **Add Note**

## Adding a Template for Item Types

To add a Note template:

1. Go to the Responses tab
2. Click Edit
3. Click Add

**Template** [Insert Parameter...]

Title [Text Field]

Note [Rich Text Editor]

Path: p Words:0

**Cancel** **Save**

4. Enter the Template Title

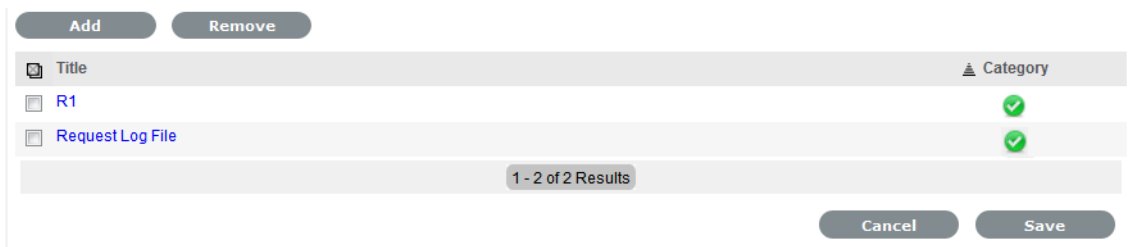
5. Complete the content for the Note, inserting any relevant parameters
6. Click Save.

## Removing a Template

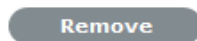
Within the Types>Response tab, only templates created for the Item Type can be deleted. Templates created at the Category level must be deleted within the Category>Responses tab.

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 603](#)
- ♦ [“Creating Custom Field Lists” on page 603](#)

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.

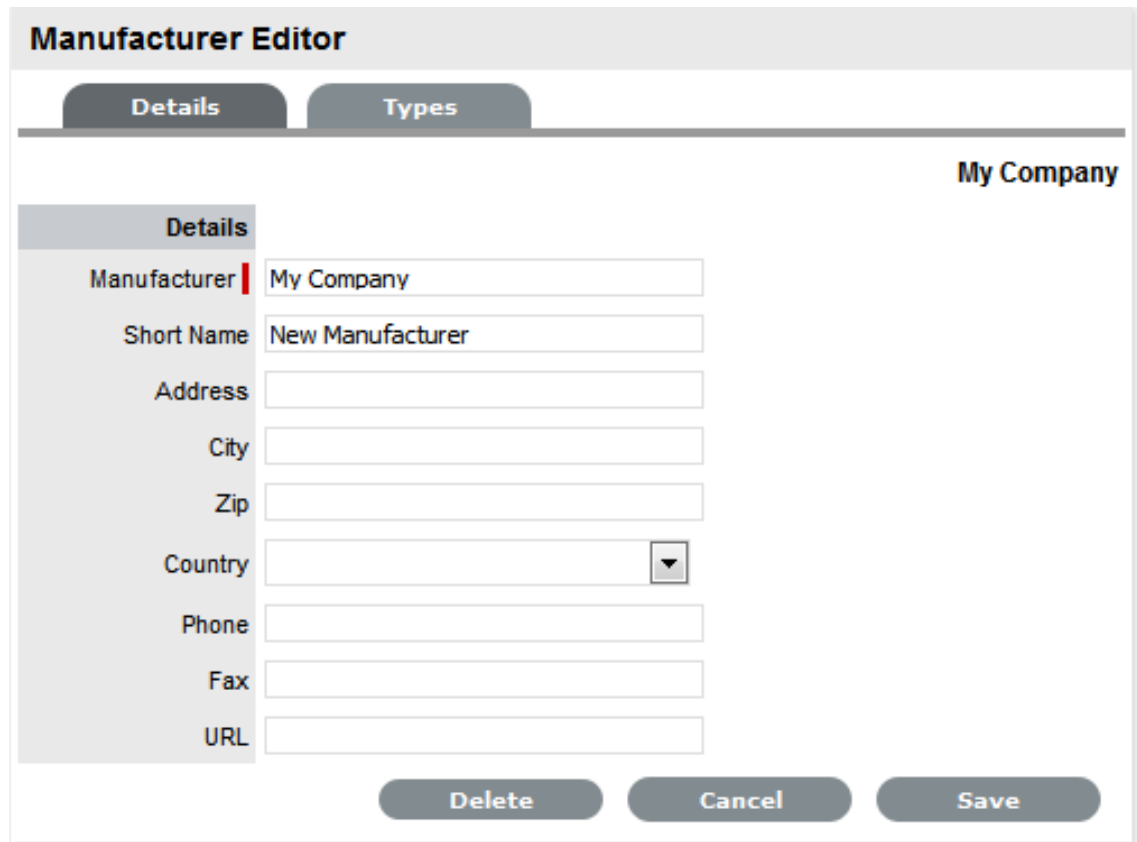
## Editing a Manufacturer

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.



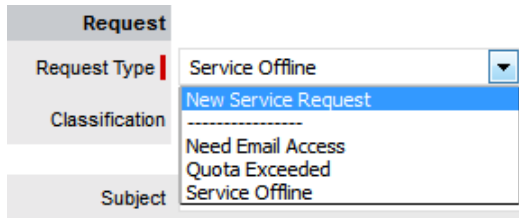
The image shows a screenshot of the 'Manufacturer Editor' interface. At the top, there are two tabs: 'Details' (selected) and 'Types'. The main area is titled 'My Company' in the top right corner. On the left, there is a vertical sidebar with the heading 'Details'. The main content area contains several input fields: 'Manufacturer' (with 'My Company' entered), 'Short Name' (with 'New Manufacturer' entered), 'Address', 'City', 'Zip', 'Country' (a dropdown menu), 'Phone', 'Fax', and 'URL'. At the bottom of the form, there are three buttons: 'Delete', 'Cancel', and '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 604](#)
- ♦ [“Creating Nested List Entries” on page 605](#)
- ♦ [“Renaming a List Entry” on page 606](#)
- ♦ [“Deleting a List Entry” on page 607](#)

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.

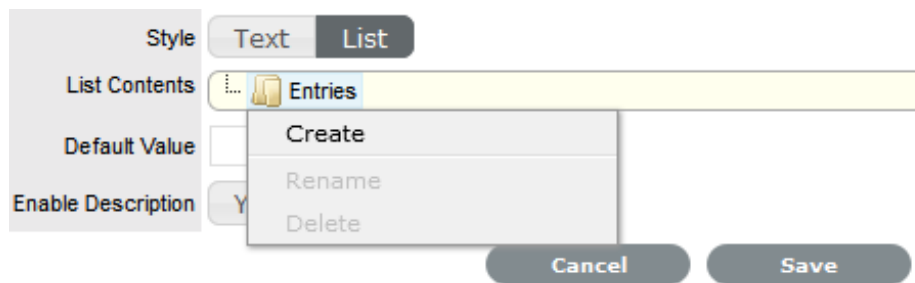


## Creating a New List Entry

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

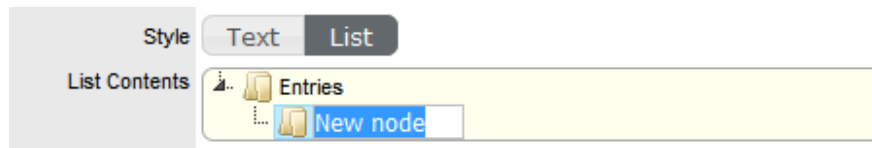
1. Right click the Entries link

The Create option is displayed

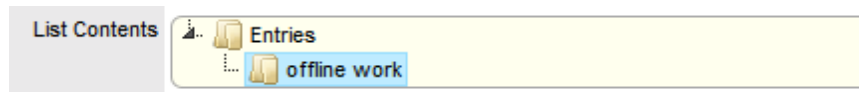


2. Click Create

A New node link displayed



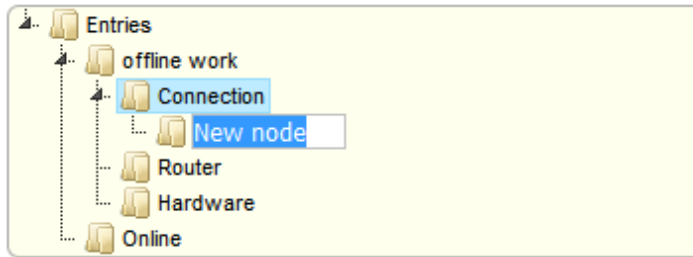
3. Enter the name of the field
4. Click outside the field to save the entry



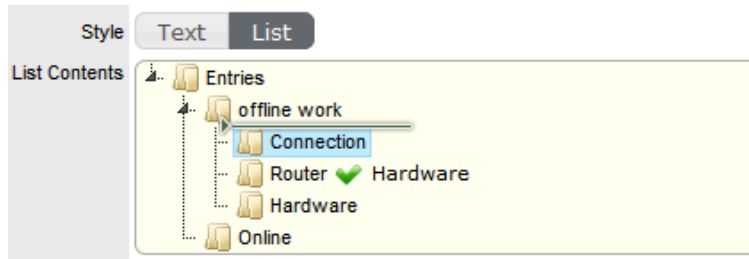
5. Repeat this process until all list entries have been added

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

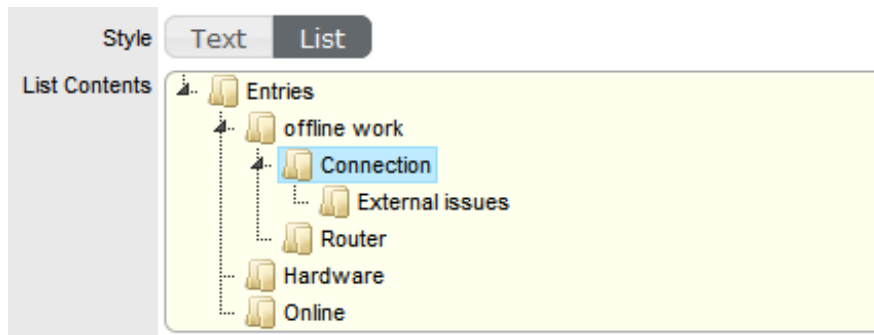




- To move an existing entry to a new position, select the entry, then drag and drop the entry into its new location



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

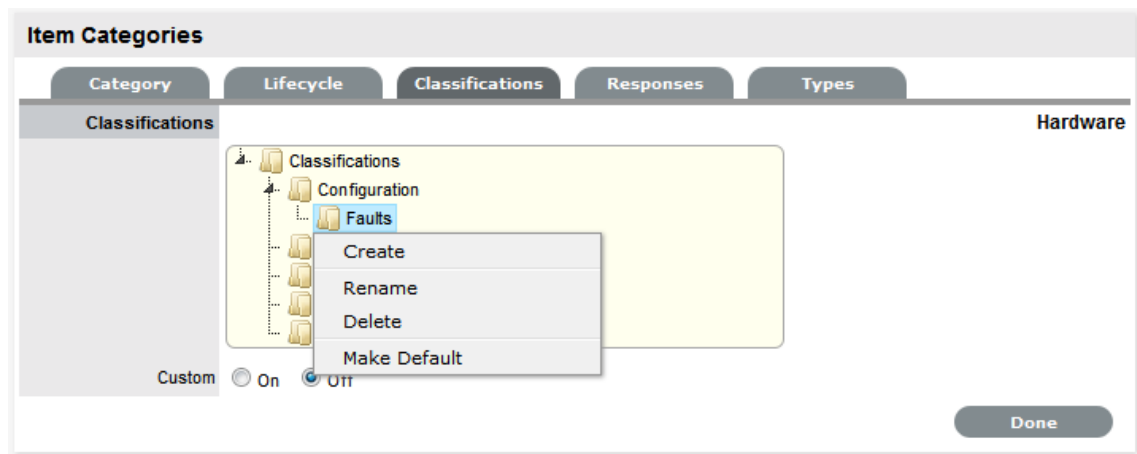


## Creating Nested List Entries

List entries can be expanded to include nested options.

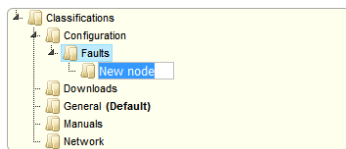
To create a nested list:

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



2. Select Create

A text box will appear under the list entry.



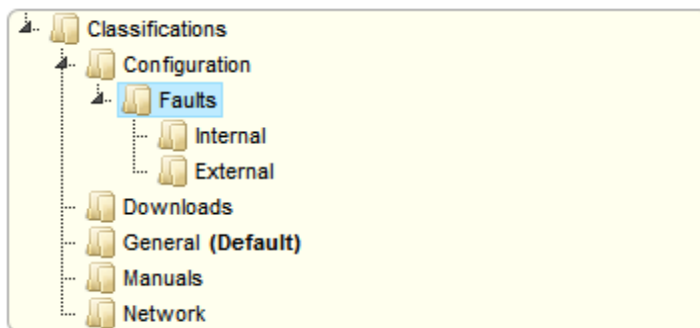
3. Enter the name for the list entry

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.

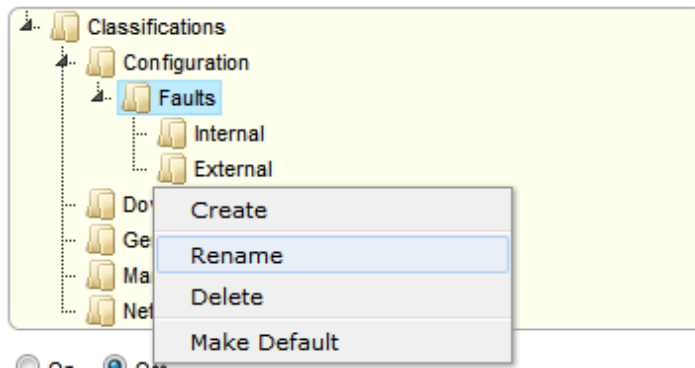


### Renaming a List Entry

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 607](#)
- ♦ [“Category Lifecycle” on page 616](#)
- ♦ [“Classifications Tab” on page 623](#)
- ♦ [“Responses Templates” on page 627](#)
- ♦ [“Item Category Types” on page 630](#)
- ♦ [“Federation Tab” on page 630](#)

### 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 details:

- Category:** New Category
- Description:** (Empty text area)
- Item No. Validation:** Yes (unselected), No (selected)
- Service Category:** (Unchecked checkbox)
- Fields:** Generated on Save
- Buttons:** Cancel, Save

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:

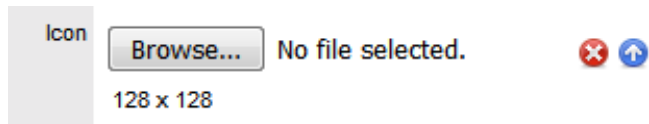
**Fields**

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.<br><br>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"> <li>◆ String - List or Free Text</li> <li>◆ Number</li> <li>◆ Boolean - radio buttons for Yes/No and True/False</li> <li>◆ Date - creates a date field</li> <li>◆ Currency- creates a currency field</li> <li>◆ Hyperlink.</li> </ul> |
| Style             | States the style of the field.<br><br>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 is 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.

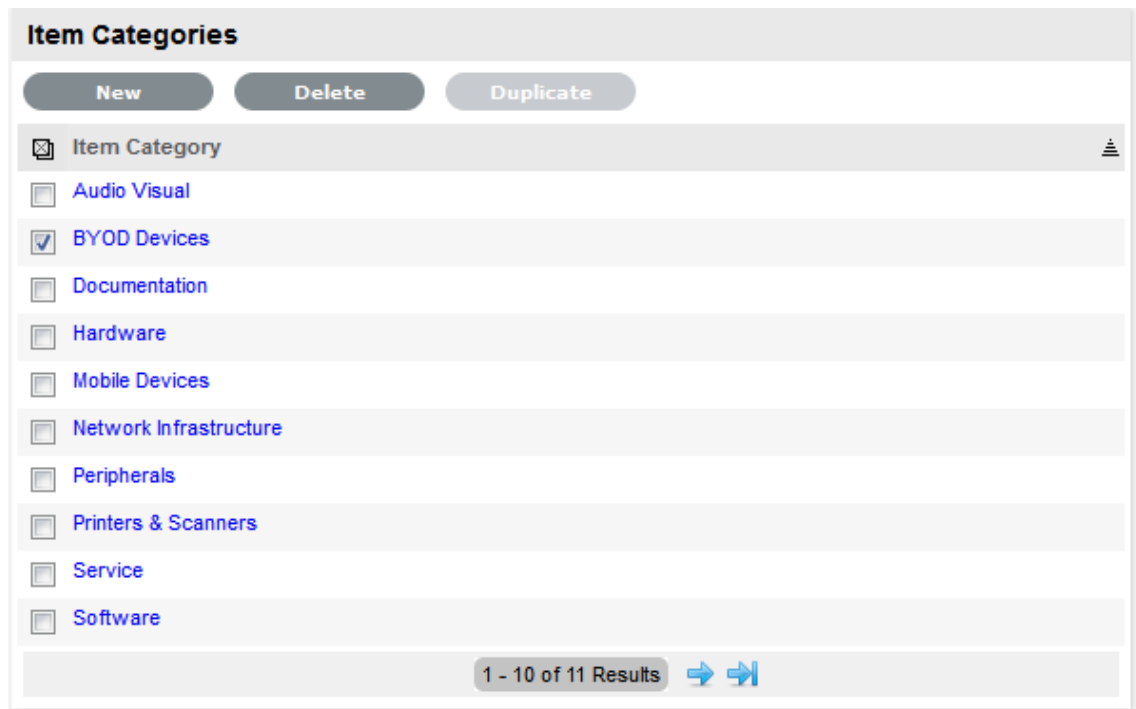
### ***Duplicating a Category***

To fast track the creation of an Item Category, each can be duplicated.

To duplicate an existing Category:

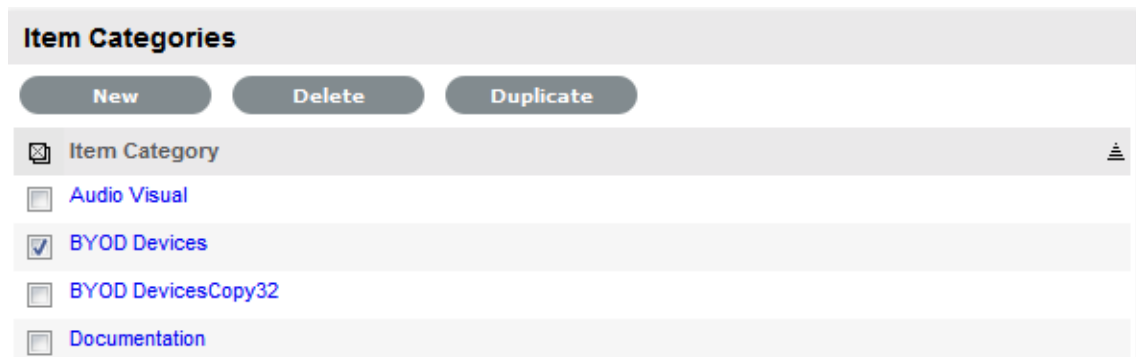
1. Select Configuration>Categories
2. Tick the box to the left of the Category name





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

Service Category

Description

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"/> |          |

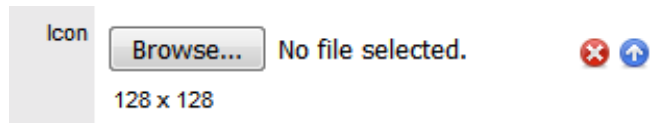
---

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.<br><br>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"> <li>◆ String - List or Free Text</li> <li>◆ Number</li> <li>◆ Boolean - radio buttons for Yes/No and True/False</li> <li>◆ Date - creates a date field</li> <li>◆ Currency- creates a currency field</li> <li>◆ Hyperlink.</li> </ul> |
| Style             | States the style of the field.<br><br>eg. String- List or Free Text field.   |

---





| Categories Fields  | Description   |
|--------------------|---|
| 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.<br><br><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.)<br><br><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.   |

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.

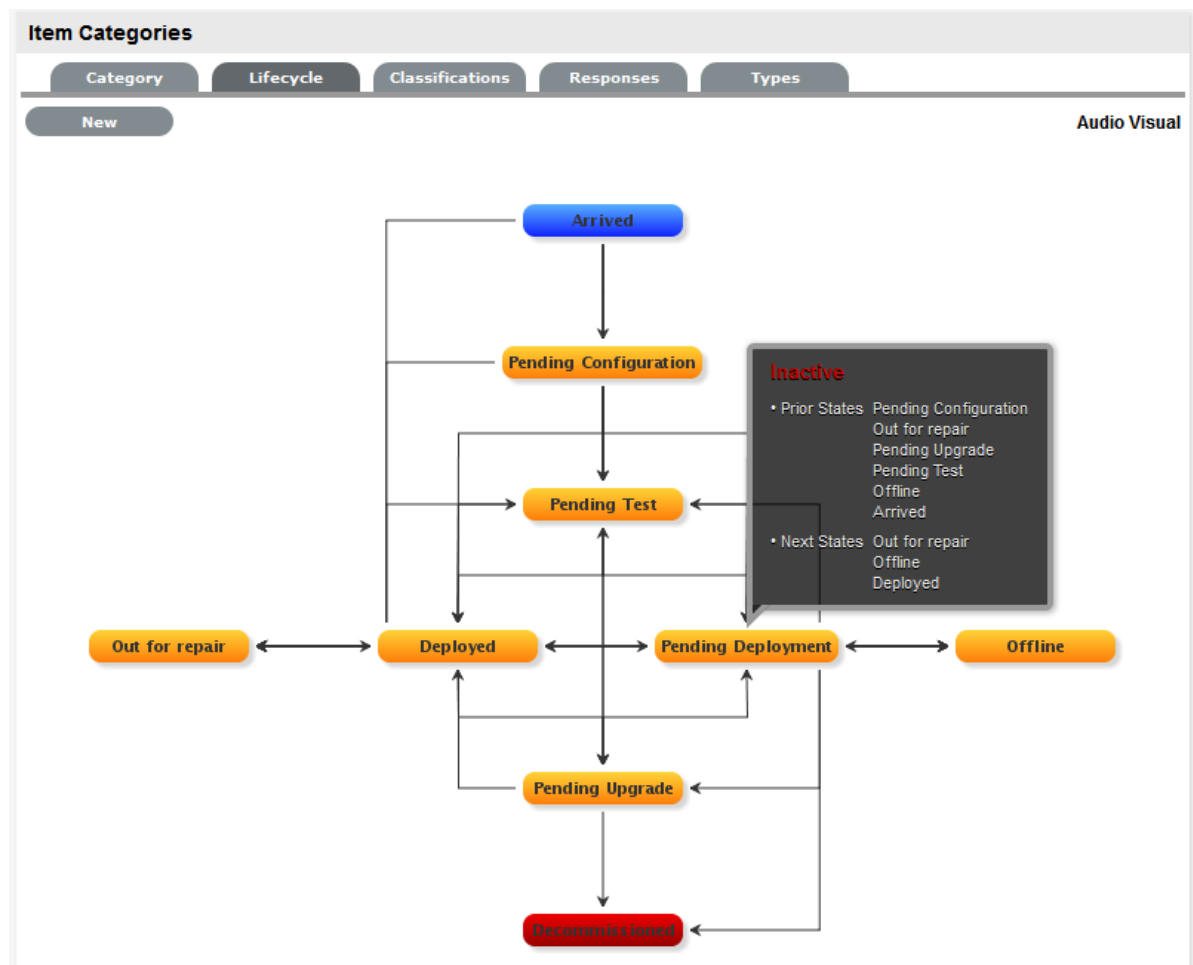
## Category Lifecycle

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.

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. |

|                      | <b>Description</b>   |
|----------------------|--|
| Customer Visible     | When selected, Items in this State are visible in the Customer Portal  |
| 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          | <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           | Select whether the state will be an Exit Point. An Exit Point is used to indicate the end of a Lifecycle.  |
| Listener Class       | <p>This field is visible if the Outbound Webservices option is enabled in the Admin&gt;Setup&gt;Privileges&gt;System tab.</p> <p>Complete this field, if assigning an Item to this State 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.listen.LifecycleListener</code> that has been compiled into a jar file and added to the LiveTime classpath. Please contact support for further details.</p> |

---

**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,

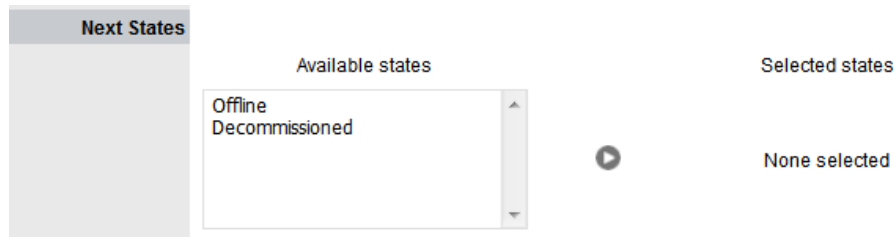
Using all Available States entered in the Lifecycle, define the status direction options of an Item that uses this Item Category template.

|                  | 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 623](#)

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.

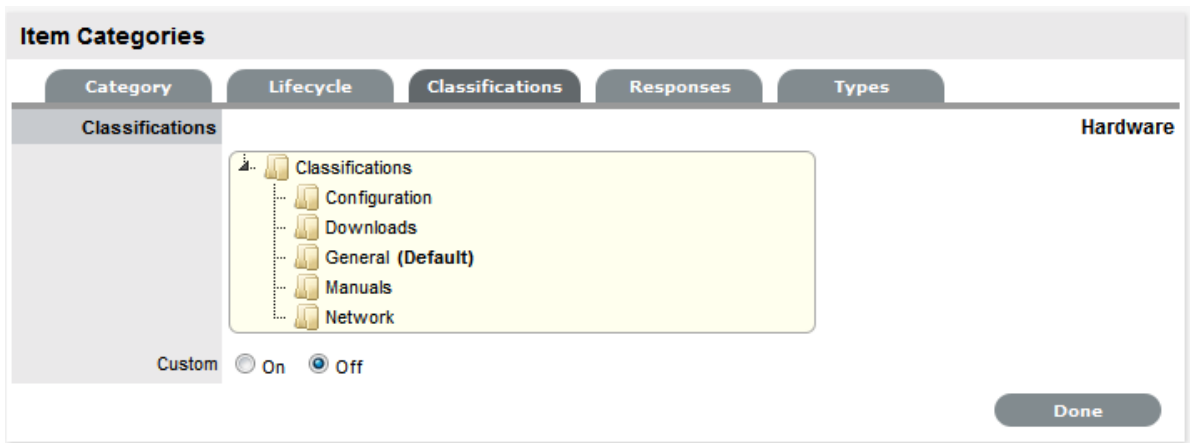
---

**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

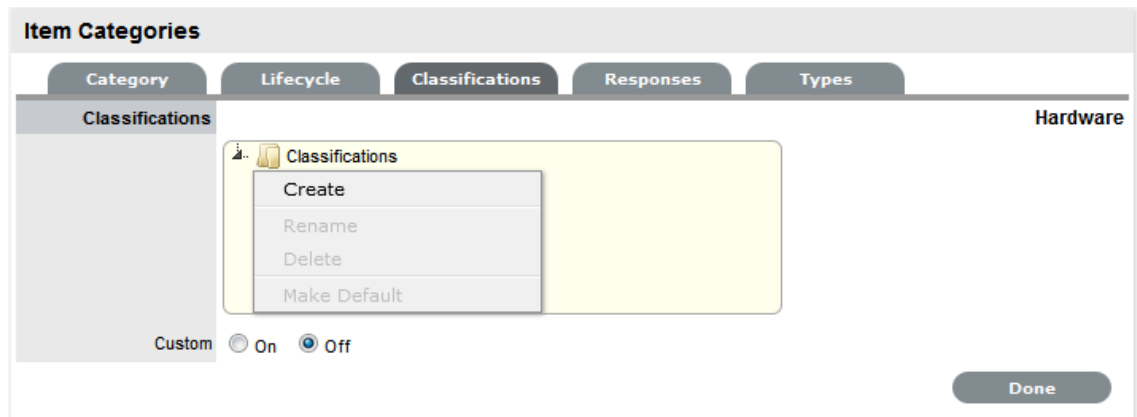
Additional Classifications can be created for each Item Category, while the system provided Classifications can be renamed or deleted. The Custom facility, when enabled, allows Users to add Classifications during the request creation process.



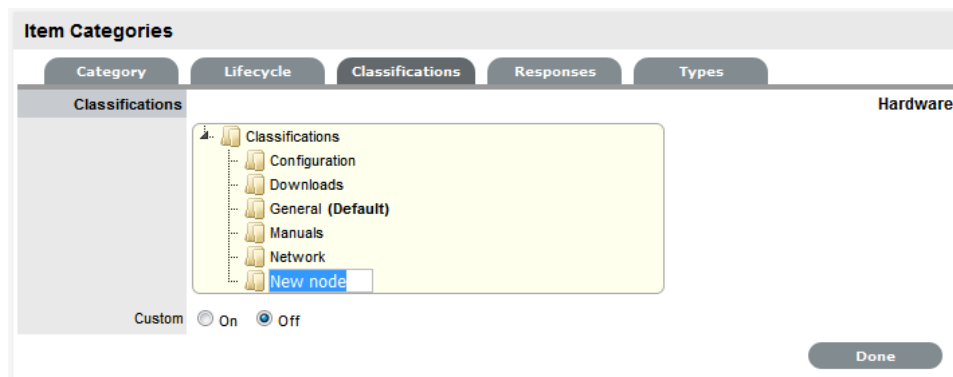
### Creating a New Item Category Classification

To add a new Classification:

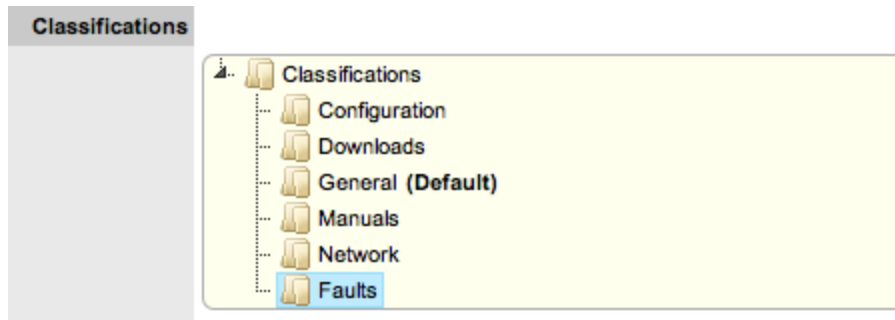
1. Select the Classification tab of an Item Category
2. Right-click on the Classifications header
3. Select Create



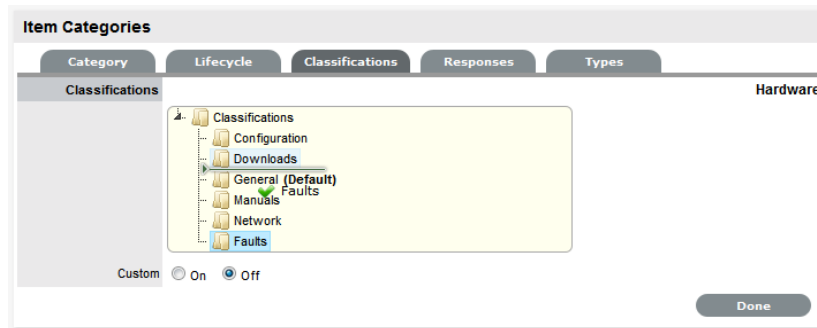
4. Enter the details in the newly created node



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.

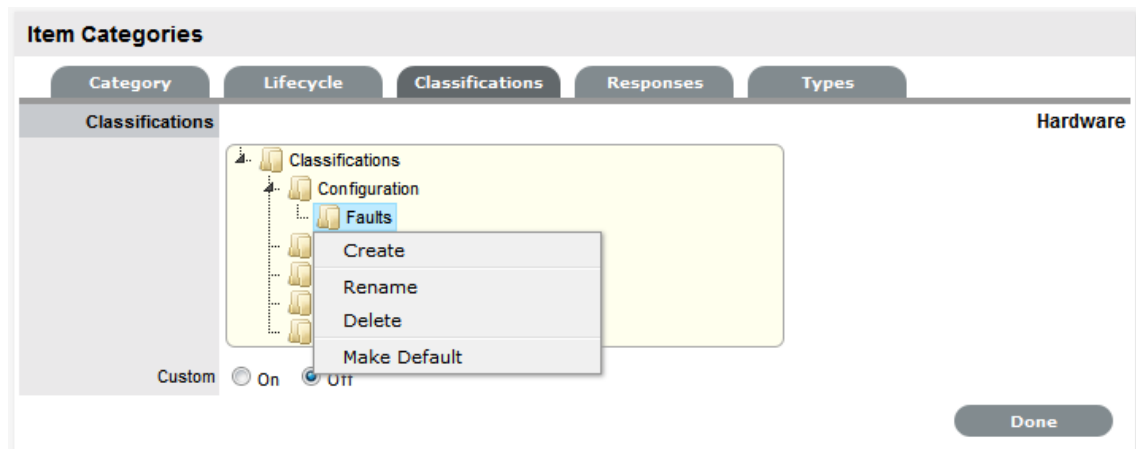
### ***Creating Sub-Classifications***

Classifications can be expanded to include nested Classifications.

To create Sub-Classifications:

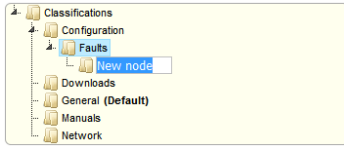
1. Right-click the relevant Classification header

The Create, Rename, Delete and Make Default options are displayed.

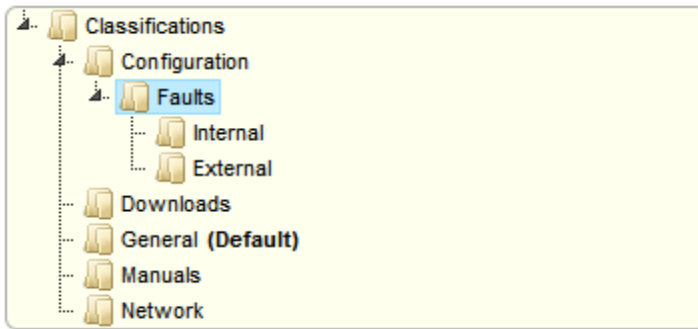


2. Select Create

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.

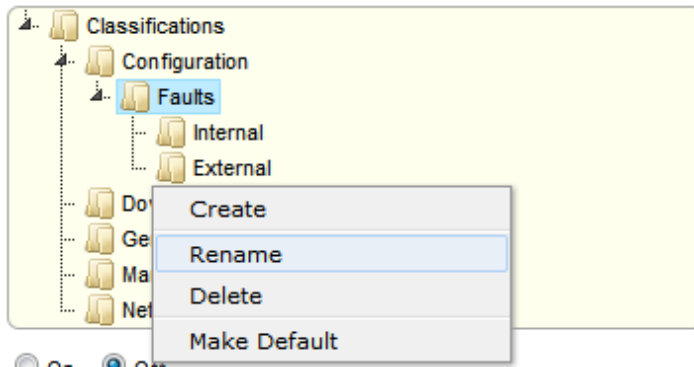


### ***Renaming a Classification***

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.

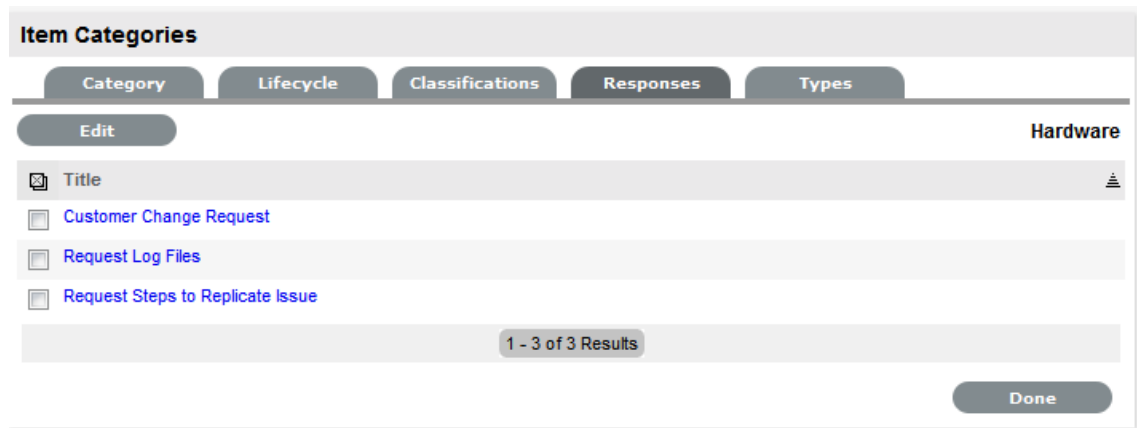
The following screen displays a list of default template options available within the Notes tab of a request:

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, showing '0 (Minutes)'. To the right of this is a timestamp '01/20/16 10:22' and a 'Select a template...' dropdown menu. Below these fields is a rich text editor. The editor has a 'Format' dropdown, 'Font Family', and 'Font Size' options. The text area contains '----- Initial Description -----' and 'Change Request - Item has been marked for creation'. At the bottom of the dialog, there are 'Attachments', 'Visibility' (Private/Public), and 'Create Knowledge' (Yes/No) options, along with 'Solution', 'Draft', and 'Add Note' buttons.

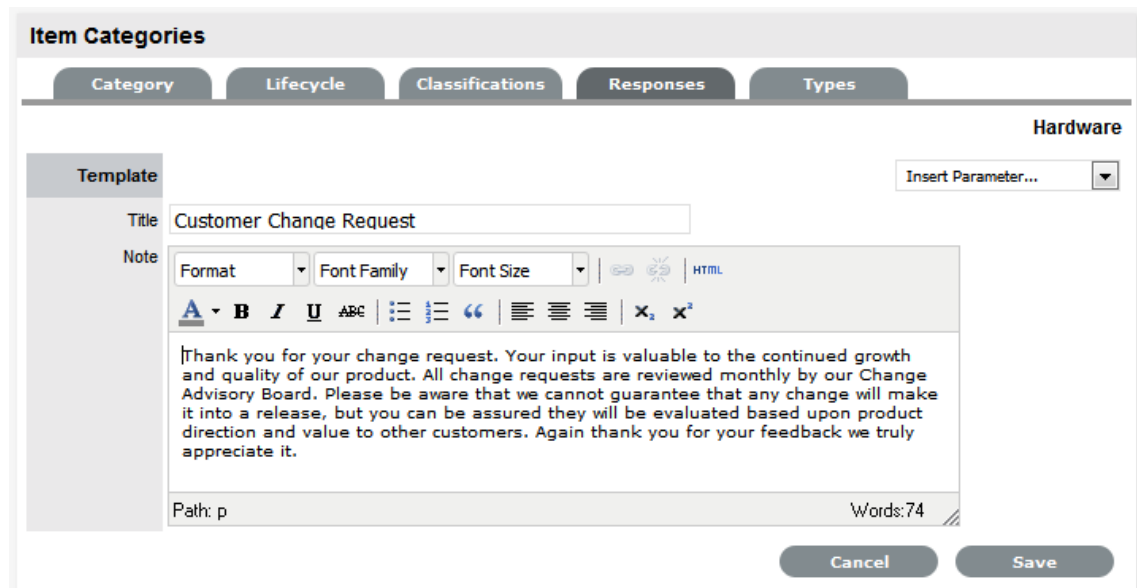
## Editing a Template

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.



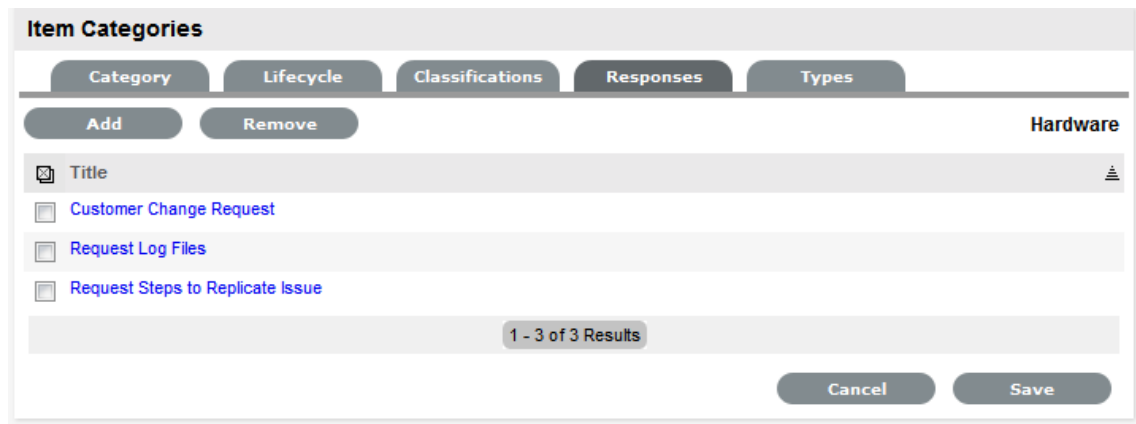
6. Amend the Note template and insert any relevant parameters
7. Click Save.

## Adding a Template

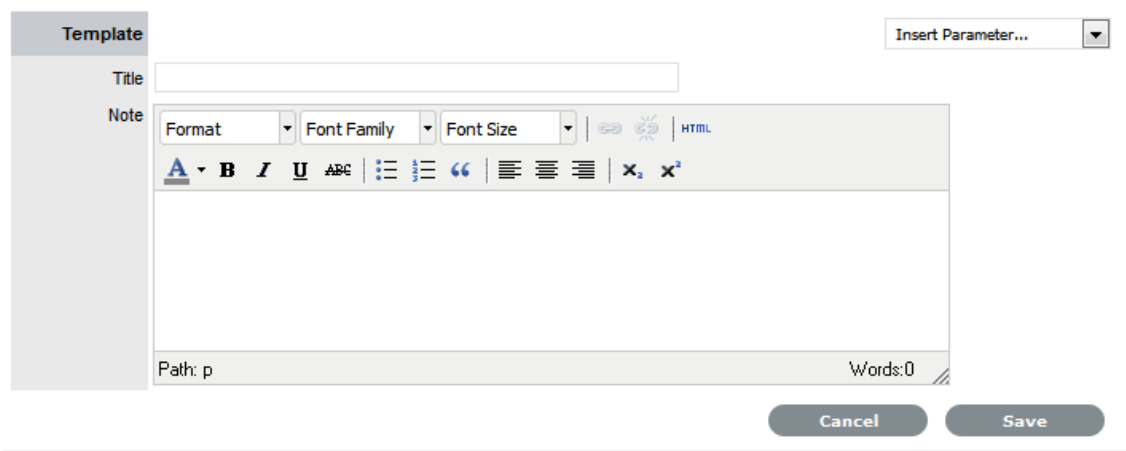
To add a Note template:

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

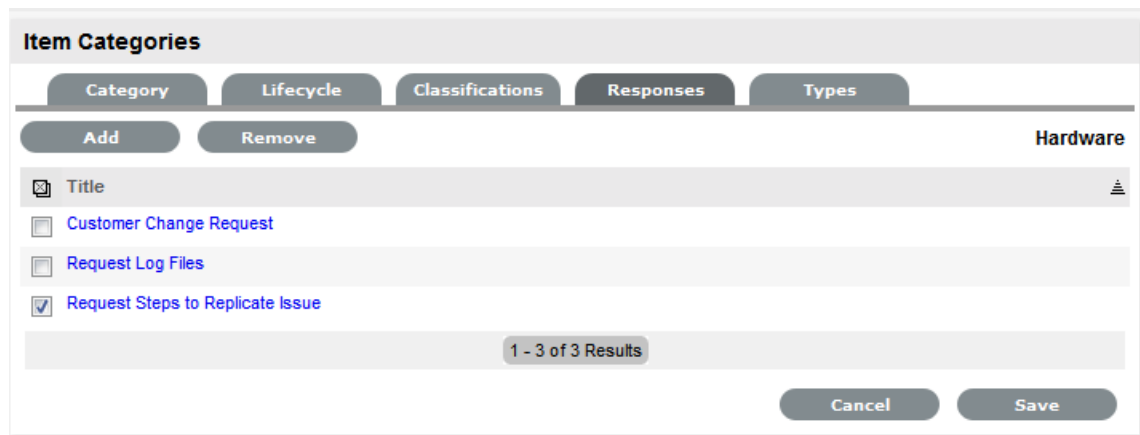


7. Complete the content for the Note and Save.

## Deleting a Template

To delete a template:

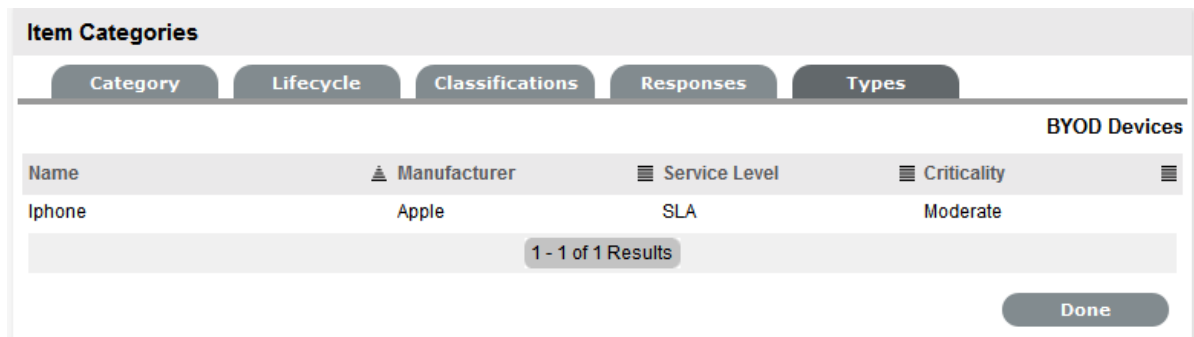
1. Go to Configuration>Categories
2. Select the hyperlink for the relevant Category
3. Move to the Responses tab
4. Click Edit



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.

- 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

---

- 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.
- Click Done.

## 2.6.9 Vendors

A summary of Supplier and Service Provider details is displayed within the Vendor List.

| Name | Type             | Contact Name | Contact Email | URL |
|------|------------------|--------------|---------------|-----|
| EP1  | Service Provider |              |               |     |
| A    | Service Provider |              |               |     |

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 and options:

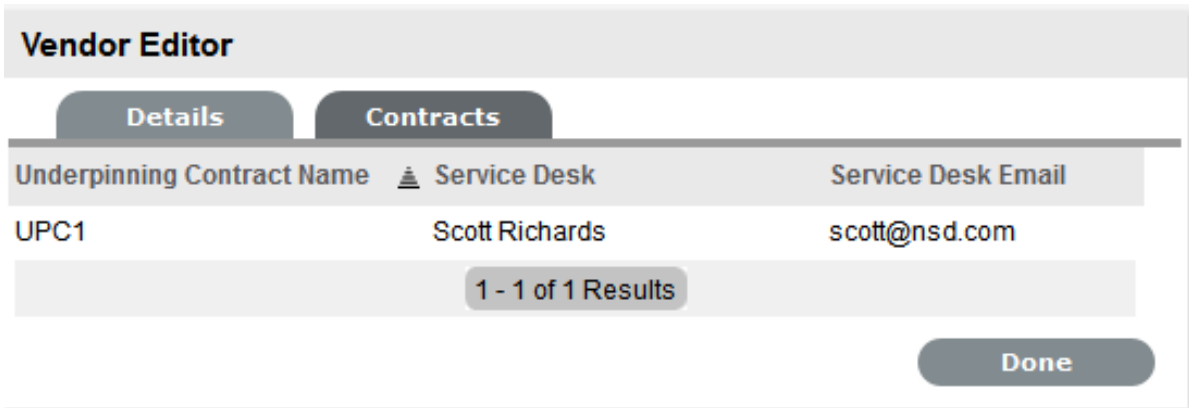
- Vendor Name:** Text input field containing 'New Vendor'.
- Type:** Dropdown menu with 'Service Provider' selected.
- Address:** Dropdown menu with 'Service Provider' and 'Supplier' options; 'Service Provider' is highlighted.
- City:** Text input field.
- State:** Text input field.
- Zip:** Text input field.
- Country:** Dropdown menu.
- Phone:** Text input field.
- Fax:** Text input field.
- Contact Name:** Text input field.
- Contact Email:** Text input field.
- URL:** Text input field.
- Notes:** Text area.

At the bottom of the form are two buttons: 'Cancel' and 'Save'.

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 screenshot shows a web form titled "Manufacturer Editor" with a "Details" tab selected. The form contains the following fields:

- Manufacturer:
- Short Name:
- Address:
- City:
- Zip:
- Country:
- Phone:
- Fax:
- URL:

At the bottom right of the form 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 635](#)
- ◆ [“Viewing Outages” on page 638](#)
- ◆ [“Customer Portal View” on page 638](#)
- ◆ [“Login Page View” on page 638](#)
- ◆ [“Planned Outage Page Options” on page 639](#)
- ◆ [“Troubleshooting” on page 639](#)

### 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

**Planned Outages**

**Details**

Interval: One Time

Start Date: [Calendar Icon]

End Date: [Calendar Icon]

Notification: None

Reason: [Text Area]

Cancel 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.<br><br>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    
Reminder   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 **🔍**

12. Click the Item Number hyperlink to add the Item to the Outage

**Planned Outages**

| Item           | 🔍                                      |
|----------------|--|
| Item Number    | 1000010                                |
| Item Type      | iphone 6                               |
| Offline Status | <input type="text" value="Offline"/>   |
| Online Status  | <input type="text" value="Available"/> |

13. 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.

14. Click Save

Repeat Steps 9 to 12 to add more than one Item to the Outage. Click **-** to remove Item details from the Outage.

15. Click Save and Done.

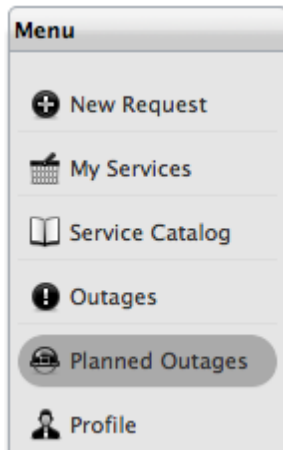
The Outage details are visible in the Planned Outage page, if the Criticality of the Item is equal to or greater than the Minimum Criticality set by the Administrator within the Setup>Privileges>System tab.

## 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.

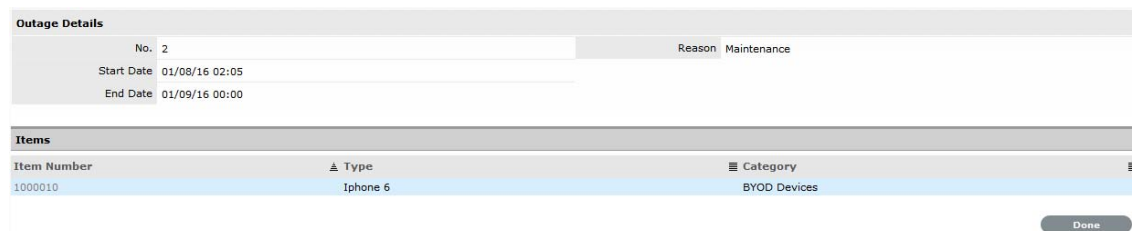


| Planned Outages |                |                |                    |             |
|-----------------|----------------|----------------|--------------------|-------------|
| No.             | Start Date     | End Date       | Items              | Reason      |
| 2               | 01/08/16 02:05 | 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

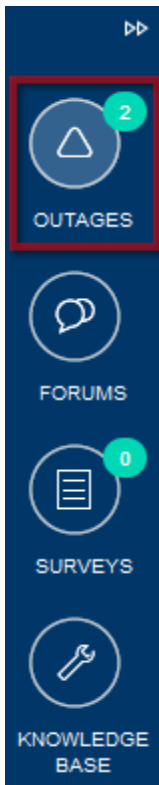
End Date 01/09/16 00:00

| 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.



| 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.



| 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 | livetime-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.

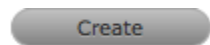
All AMIE Snapshots applied to an Item are removed from the AMIE Snapshot List View, when the list filter is set to display Unassigned Snapshots.

## Merging Snapshots



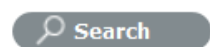
Use the Merge button when multiple Snapshots of an Item are to be stored against a single Item record in the CMDB. Select the related Snapshots by checking the relevant boxes next to the Id Number, and click the Merge button.

## 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.

---

---

## Search Parameter Options

---

|                  |   |
|------------------|---|
| 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.  |

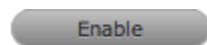
---

## 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



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 643](#)
- ◆ [Section 2.7.2, “Service Level Management Configuration,” on page 645](#)

- ♦ [Section 2.7.3, “Service,” on page 649](#)
- ♦ [Section 2.7.4, “Contracts,” on page 710](#)

## 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.

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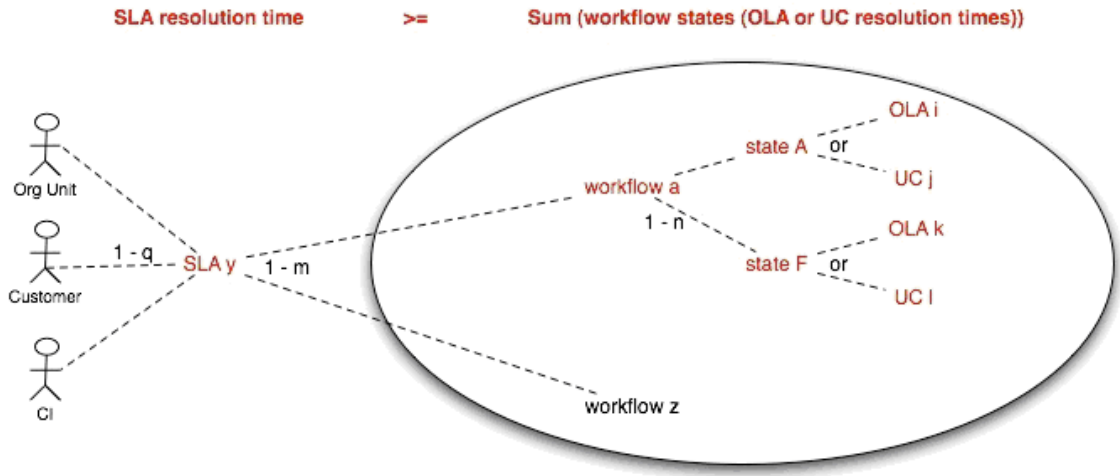
**NOTE:** Only Users assigned with the Service Level Management Role can create or modify SLAs.

---

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 645](#)
- ♦ [“OLAs & UCs” on page 645](#)
- ♦ [“Workflows and Workflow States” on page 645](#)
- ♦ [“Escalation” on page 645](#)
- ♦ [“SLAs and Workflow” on page 646](#)
- ♦ [“Configuring SLM in the system” on page 646](#)
- ♦ [“Applying SLM to request creation and management” on page 647](#)

### 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

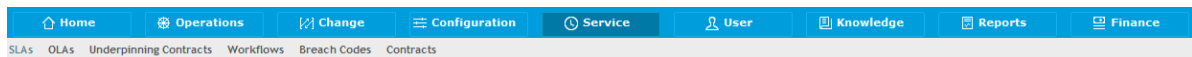
f. If the request is related to other Incidents, Problems, Change or Service Requests, view all related requests within the Related sidebar in the Summary screen.

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 649](#)
- ◆ [“Operational Level Agreements \(OLAs\)” on page 660](#)
- ◆ [“Underpinning Contracts” on page 665](#)
- ◆ [“Workflows” on page 670](#)
- ◆ [“Breach Codes” on page 706](#)
- ◆ [“Assigning an SLA” on page 707](#)

### 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.

**SLA Editor**

**Details** | Targets | Blackouts | Workflows

**Details**

Name |

On Breach  cc Team Leader

Pause on Holiday

Customer Timezone

Timezone | (GMT +5:30) New Delhi ▼

**Requirements**

Availability | 97.0 % Uptime

Interval Measured in  Days

**SLM**

Name

Email

**Internal Costs**

Annual Cost

Request Cost

Hourly Cost

**Customer Prices**

Annual Price

Request Price

Hourly Price

**Find Service Level Manager**

First Name  Email

Last Name  Phone

Cancel Next

3. Complete the fields, including any custom fields, as required:

---

**SLA Editor**

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**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.

---

---

## SLA Editor

---

|                             |  |
|-----------------------------|--|
| Pause on Holiday            | <p>**This option is only displayed if the Observe Public Holidays option has been enabled within the Administrator&gt;Setup&gt;Privileges&gt;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&gt;Setup&gt;Public Holidays screen and associated with requests via the assigned Technician and their associated Country.</p> |
| Customer Timezone           | <p>When enabled, SLA times displayed within the Technician request view uses the Customer timezone.</p>  |
| Timezone                    | <p>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.</p>   |
| Requirements                |  |
| Availability*               | <p>Used to state the time an Item under the SLA is required to be online. The default value is set to 97%.</p>   |
| Interval Measured in        | <p>Defines the number of days over which the Availability requirement is calculated.</p>   |
| 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                        | <p>Use the Find Service Level Manager search option, to enter the contact details of the Manager who will monitor the performance of the SLA.</p>  |
| 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>  |
| Internal Cost ^             |  |

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---

**SLA Editor**

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|                    |   |
|--------------------|---|
| Annual Cost ^      | <p>The SLA cost is calculated on the basis of what it 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 ^     | <p>Indicates the cost applied on a Per Request basis. This figure can be used as a reference for setting the Incident Price.</p>  |
| Hourly Cost ^      | <p>Indicates the cost applied on an Hourly basis. This figure can be used as a reference for setting the Hourly Price.</p>  |
| Customer Pricing ^ |   |
| Annual Price ^     | <p>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.</p> <p>The figure entered should be on a Annual Price per User basis.</p> |
| Request Price ^    | <p>Indicates the price paid by the customer when the SLA is applied on a Per Request basis.</p>   |
| Hourly Price ^     | <p>Indicates the price paid by the customer when the SLA is applied on an Hourly basis.</p>   |

\* 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:



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## SLA Editor

---

Targets

Targets

*Common:* Select Common if the SLA is to apply across Incidents, Requests, Problems and Change Management.

*Per Process:* 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

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.

---

---

## SLA Editor

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|                |   |
|----------------|---|
| 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.  |
| 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

The screenshot shows the 'SLA Editor' interface with the 'Details' tab selected. It includes radio buttons for 'Targets' (Common, Per Process) and 'Interval' (Hours, Minutes). Below is a table for 'Service Time' with columns for Priority, Response Time, Restoration Time, Resolution Time, 24 x 7 support, and Alert. The table lists four priority levels: Urgent, High, Medium, and Low, each with corresponding time values and support/alert settings. 'Cancel' and 'Next' buttons are visible at the bottom right.

| 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

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

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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 'Support' tab selected. The 'Support' section has two radio buttons: '24 x 7' (unselected) and 'Normal Support' (selected). Below this, there is an 'Apply Template' dropdown menu. The 'Weekdays' section is expanded, showing a list of templates: 'Weekdays 8 to 5' (highlighted), 'Weekdays 9 to 5', and '<closed>'. The 'Hours' section displays a table of support hours for each day of the week:

| Day       | Start Time | End Time |
|-----------|------------|----------|
| Monday    | 08:00      | 17:00    |
| Tuesday   | 08:00      | 17:00    |
| Wednesday | 08:00      | 17:00    |
| Thursday  | 08:00      | 17:00    |
| Friday    | 08:00      | 17:00    |
| Saturday  | <closed>   | <closed> |

At the bottom of the form, there are 'Cancel' and 'Save' buttons.

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.

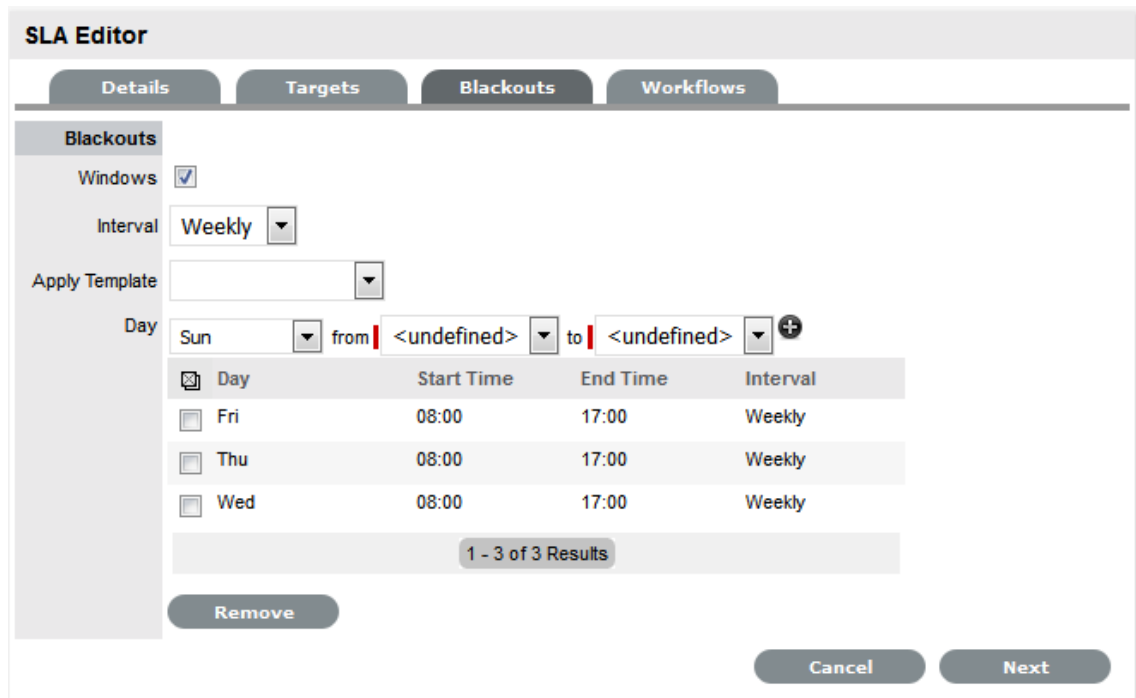
### ***Specifying an SLA Blackout***

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

The screenshot shows the 'SLA Editor' interface with the 'Blackouts' tab selected. On the left, the 'Blackouts' section has a 'Windows' checkbox checked and an 'Interval' dropdown menu. Below this is a table with columns 'Day', 'Start Time', 'End Time', and 'Interval'. The table currently shows '0 - 0 of 0 Results'. At the bottom of the table is a 'Remove' button. At the bottom right of the interface are 'Cancel' and 'Next' buttons.

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



6. Click Remove.

## Workflows

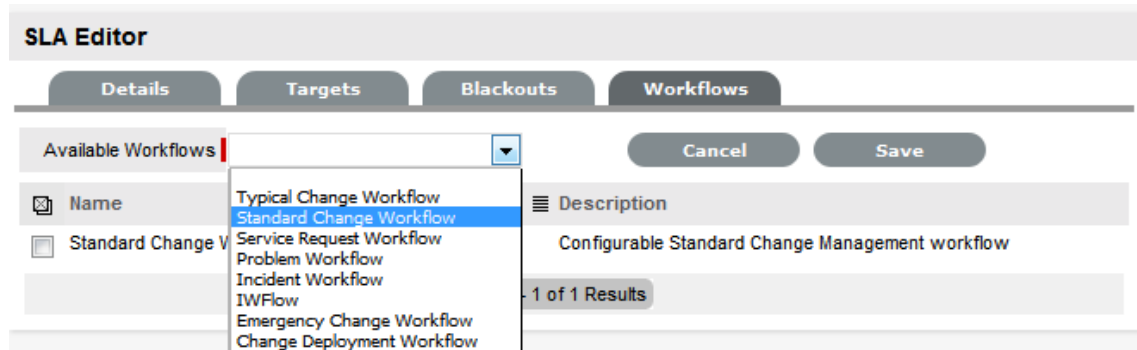
Workflows are associated with an SLA through the Workflows tab of the SLA Editor screen or within the Workflow itself. All SLAs assigned to the SLA are listed within this tab and Workflows can be added or removed within this tab, as required.

## ***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.



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

|                 |   |
|-----------------|---|
| <b>Priority</b> |   |
| Request         | Service Request Workflow                              |
| Change          | Standard Change Workflow                              |
| <b>SLM</b>      | Emergency Change Workflow<br>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><b>**This option is only displayed if the 'Public Holidays' option has been enabled within the Administrator&gt;Setup&gt;Privileges&gt;Technician tab.</b></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&gt;Setup&gt;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 |

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                                       | Selected Underpinning Contracts |
|--|---------------------------------|
| <input type="checkbox"/> New UPC 1<br><input type="checkbox"/> New UPC | 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

---

| <b>UPC Editor</b>                  |   |
|------------------------------------|---|
| <b>Details</b>                     |   |
| 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. |
| <b>SLM (Service Level Manager)</b> |   |
| 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

### Underpinning Contract Editor

Details
Targets
States

**Details**

Targets  Common  Per Process

Interval  Hours  Minutes

Service Time

| 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

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

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 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 671](#)
- ♦ [“Service Request & Change Management Workflows” on page 680](#)
- ♦ [“Release Workflow” on page 690](#)
- ♦ [“Status Notes” on page 697](#)
- ♦ [“Building Workflows” on page 699](#)

## 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.  |

| Default State                | Description  |
|------------------------------|--|
| 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.   |
| 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&gt;Privileges&gt; 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* | 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.   |
| Open                         | Used to indicate that the request is currently open.   |
| Open Restored                | 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.   |
| Pending                      | The default first State for new requests.  |
| 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><b>NOTE:</b> 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.

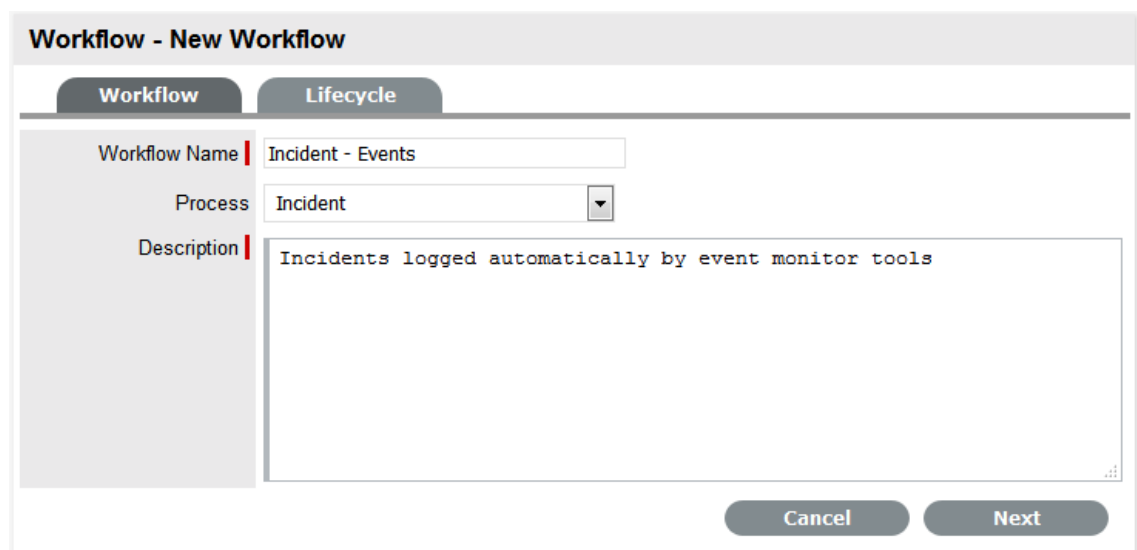
Once the Workflow Lifecycle has been defined, edit an existing Workflow by:

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 an 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"> <li>◆ 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.</li> <li>◆ 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.</li> </ul> |
| 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 &amp; 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**

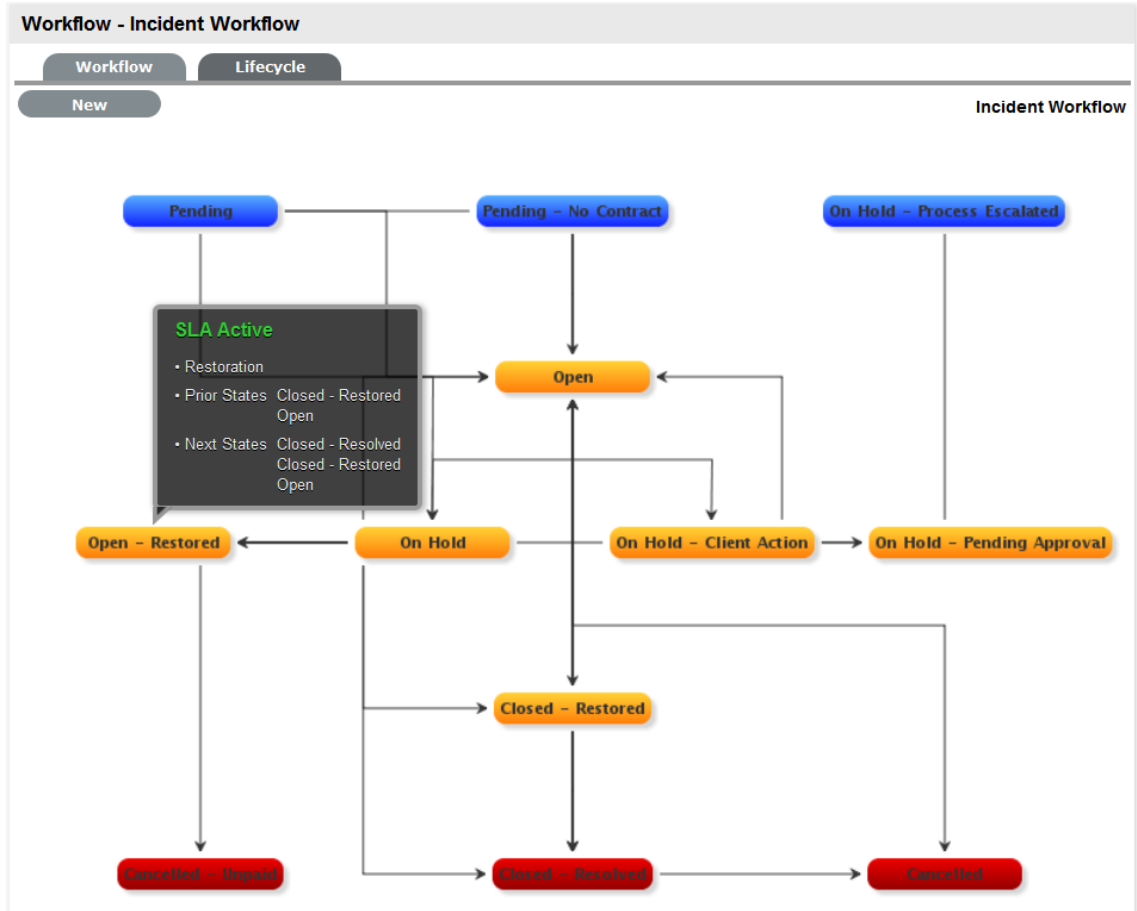
**Edit**

|                       |                   |
|-----------------------|-------------------|
| 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> |

---

---

| <b>Status</b>   |   |
|-----------------|---|
| 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 whether the State will be an Exit Point. An Exit Point is used to indicate the end of a Lifecycle.</p> <p><b>NOTE:</b> 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&gt;Setup&gt;Privileges&gt;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>  |

---

---

**Status**

---

|                 |   |
|-----------------|---|
| Contract Type   | 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. |
| Assign SLM      | 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.  |
| 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.

---

| <b>Color</b> |   |
|--------------|---|
| 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"> <li>◆ 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.</li> <li>◆ 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.</li> </ul> |

| 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

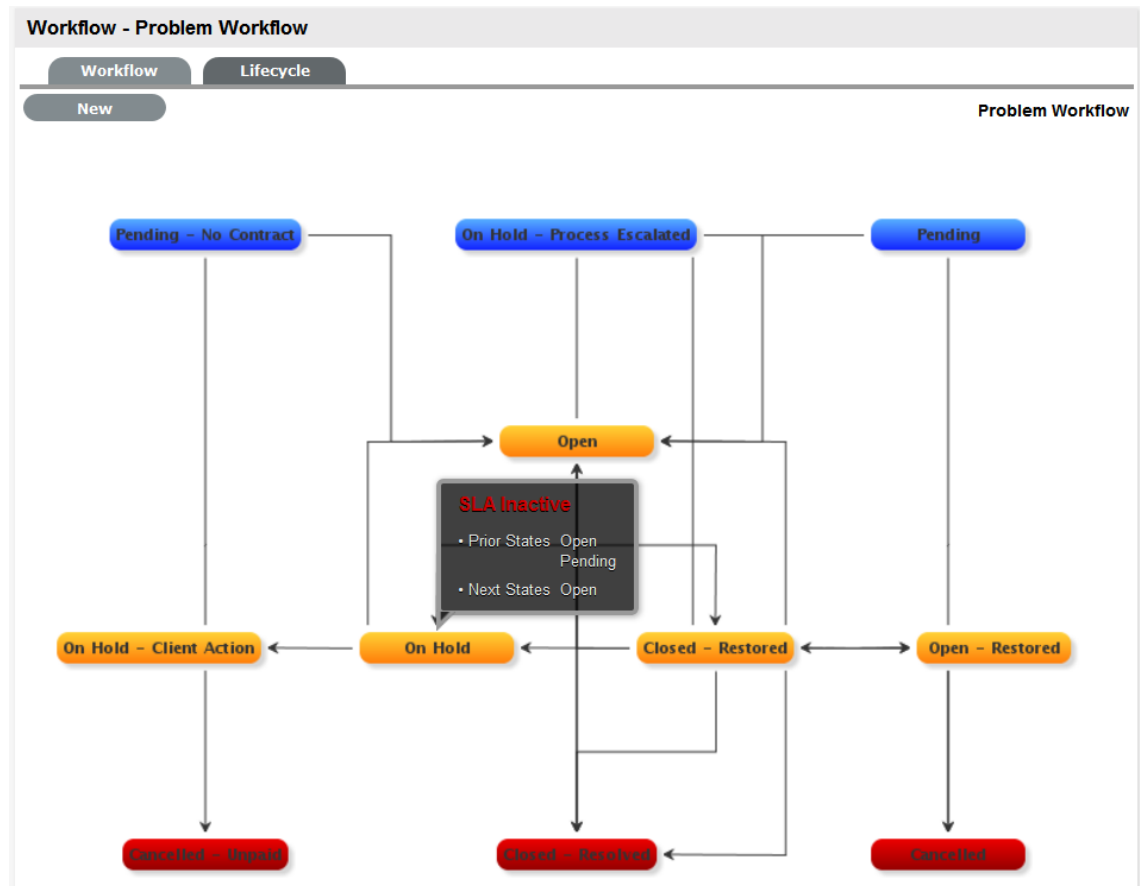
Description |

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 | On Hold

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 | Assign Yes for requests to be available in the Home tab by default, when assigned to this stage of the Workflow.<br><br>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. |

---

---

**Status**

---

|                |   |
|----------------|---|
| 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><b>NOTE:</b> An Entry/Exit status cannot be an Approval State.</p>  |
| 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><b>NOTE:</b> 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>  |

---

---

**Status**

---

|                 |   |
|-----------------|---|
| Listener Class  | <p>This field is visible if the Outbound Web Services option is enabled in the Admin&gt;Setup&gt;Privileges&gt;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>   |
| SLA Restoration | <p>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.</p>   |
| SLA Resolution  | <p>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.</p>   |
| Contract Type   | <p>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.</p>   |
| Assign SLM      | <p>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.</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 Request 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>   |

---

---

**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

The screenshot shows a web interface for editing a workflow. The title is "Workflow - Release Workflow". There are two tabs: "Workflow" and "Lifecycle". The "Workflow" tab is selected. Below the tabs is a "Duplicate" button. The main form area contains the following fields:

- Workflow Name: Release Workflow
- Process: Release
- Default Open Status: Plan
- Default Closed Status: Closed
- Description: Configurable Release Management workflow

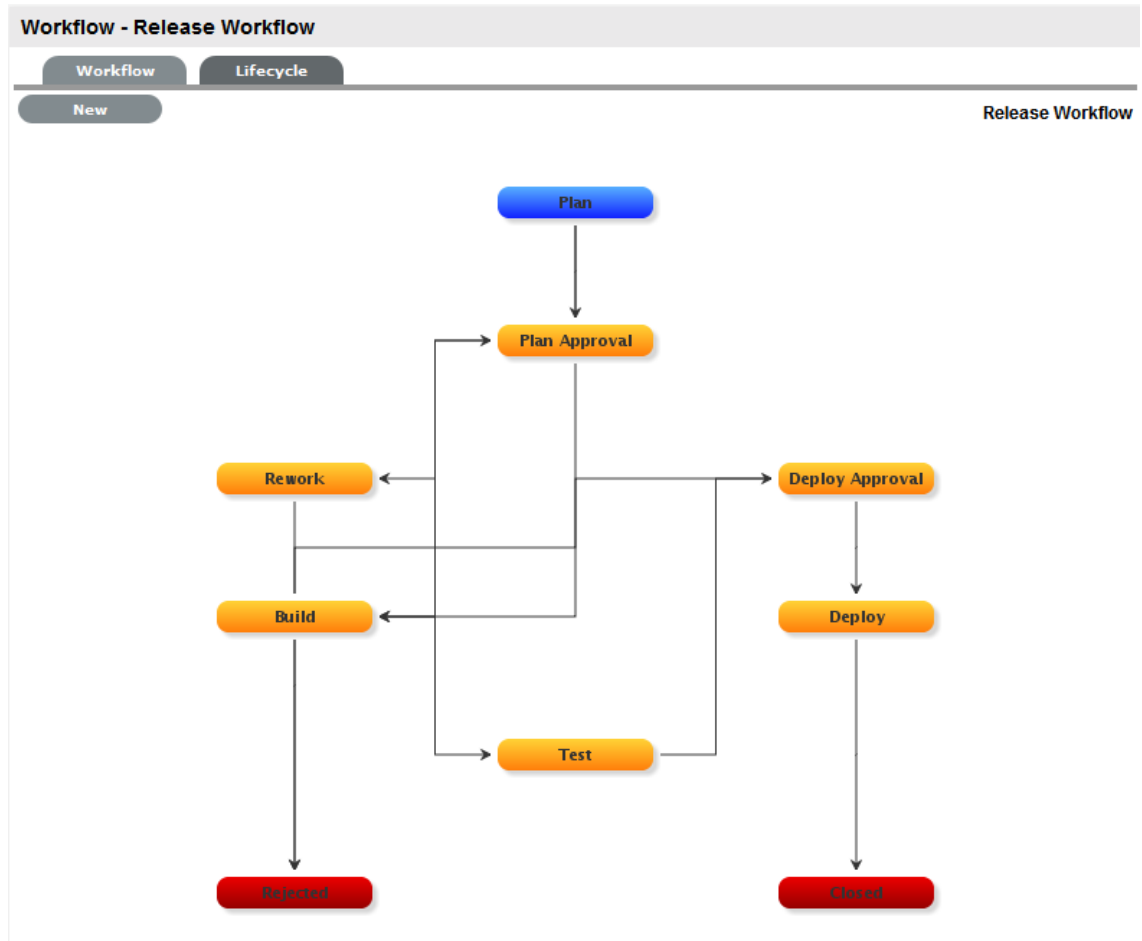
At the bottom right of the form are "Cancel" and "Save" buttons.

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<br>Deploy<br>Deploy Approval<br>Plan<br>Plan Approval<br>Rework | ▶ | None selected   |

**Next States**

| Available states  |   | Selected states |
|---|---|-----------------|
| Build<br>Closed<br>Deploy<br>Deploy Approval<br>Plan Approval<br>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><b>NOTE:</b> An Entry/Exit status cannot be an Approval State.</p>   |

---

---

**Status**

---

|                  |  |
|------------------|--|
| 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.  |
| 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><b>NOTE:</b> 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&gt;Setup&gt;Privileges&gt;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  | 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.   |
| 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 option is Yes.)<br><br>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.  |
| Approval     | (Visible when the Approval State or KBA Approval option is Yes.)<br><br>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. <ul style="list-style-type: none"><li>◆ <i>Team Manager</i>, select if a single Manager User assigned to the Team is to process the Request.</li><li>◆ <i>Team Managers#</i> 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.</li><li>◆ <i>Team Managers%</i> 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.</li></ul> |
| Reject State | (Visible when the Approval State option is Yes.)<br><br>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.

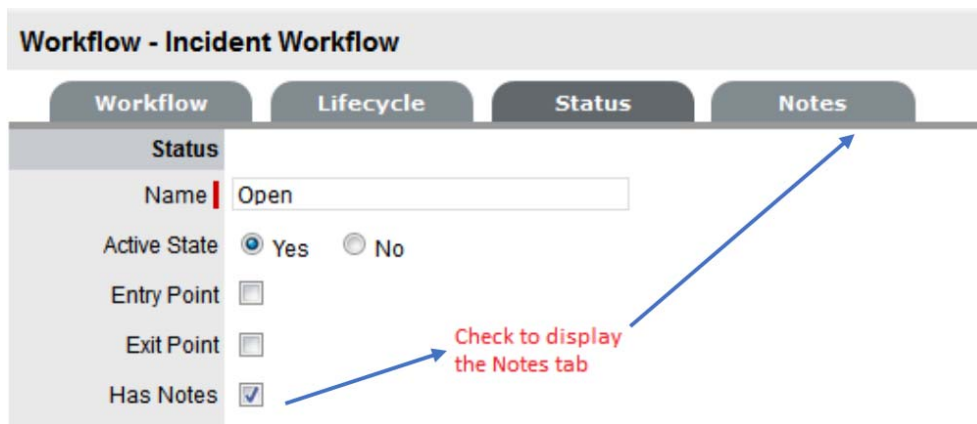
### **Status Notes**

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.

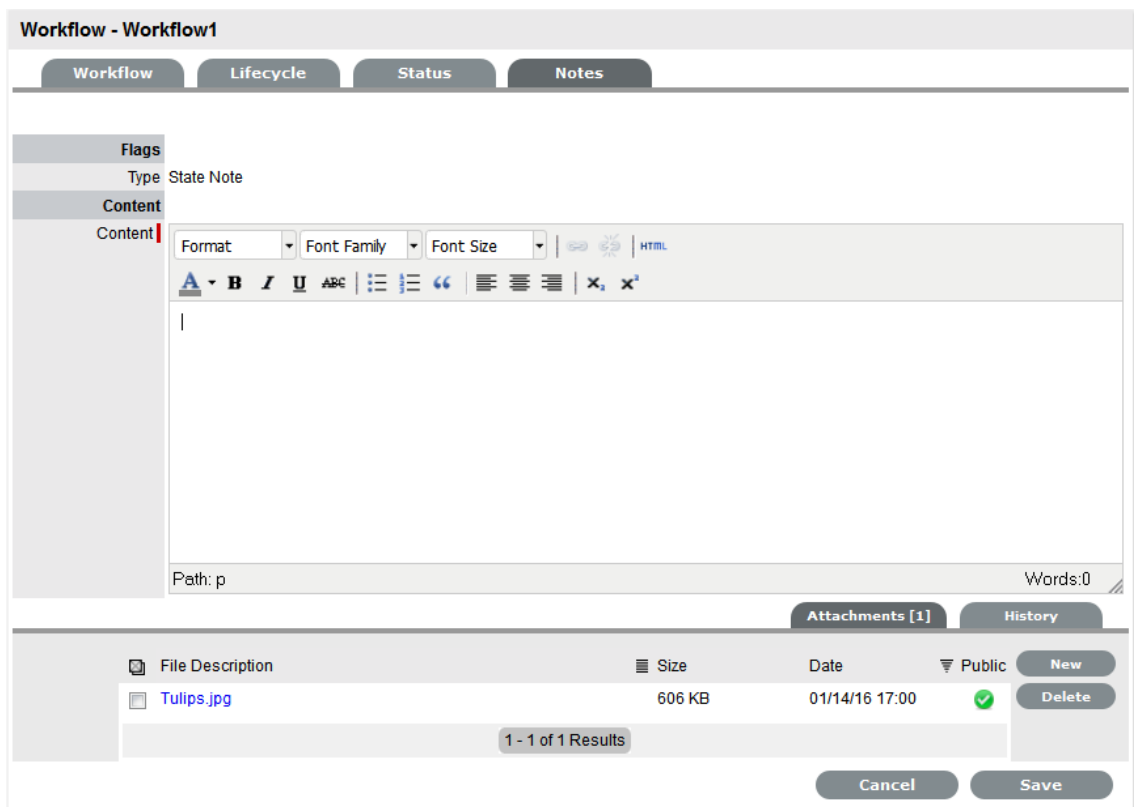
### ***Assign a Status Note***

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.



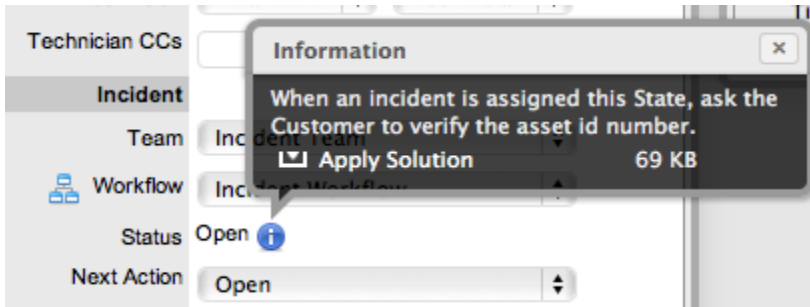
5. Select the Notes tab
6. Enter the Note content
7. Upload attachments, if required



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, **i** is displayed beside the Status field within the Summary tab of the request. Scroll over the **i** to view the Status Note and access any attachments.



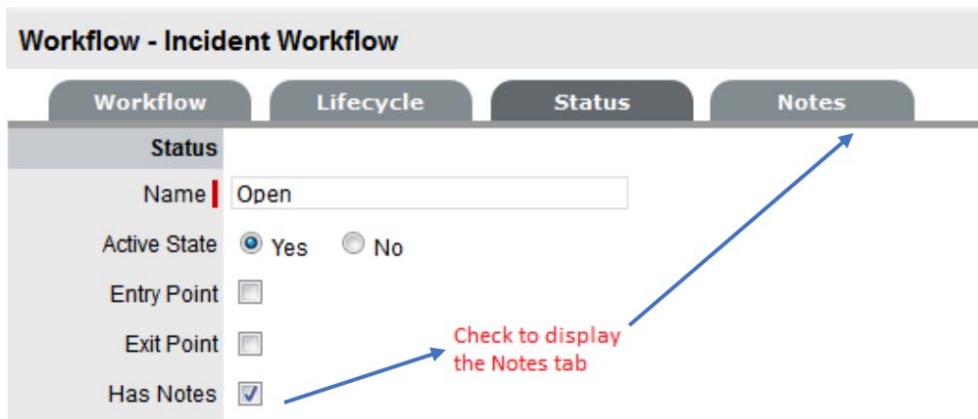
## Building Workflows

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:



### ***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 On Hold - Process Escalated

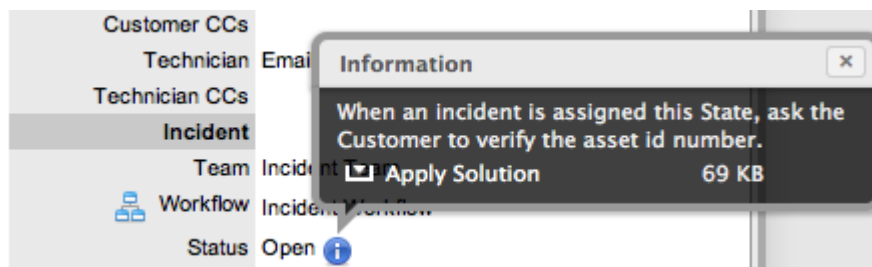
Note Action  Do nothing  Update status

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.





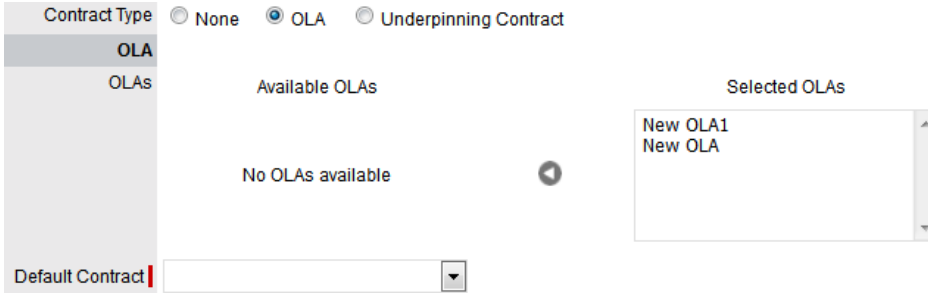
When a request moves into a Workflow stage with a Status Note,  is displayed next to the Status field in the request Information screen. Technicians can then view the notes by scrolling over the icon.

### **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.



The screenshot shows a configuration interface for 'Contract Type'. At the top, there are three radio buttons: 'None', 'OLA' (which is selected), and 'Underpinning Contract'. Below this, there is a section for 'OLAs'. On the left, there is a list of 'OLAs' with 'OLA' selected. In the center, under 'Available OLAs', it says 'No OLAs available'. On the right, under 'Selected OLAs', there is a list box containing 'New OLA1' and 'New OLA'. At the bottom, there is a 'Default Contract' dropdown menu.

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.

Contract Type  None  OLA  Underpinning Contract

**Underpinning Contract**

Underpinning Contracts

Available Underpinning Contracts

- UPC1
- New UPC12
- New UPC1
- New UPC

Selected Underpinning Contracts

None selected

Default Contract

Assign SLM  Yes  No

### ***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.

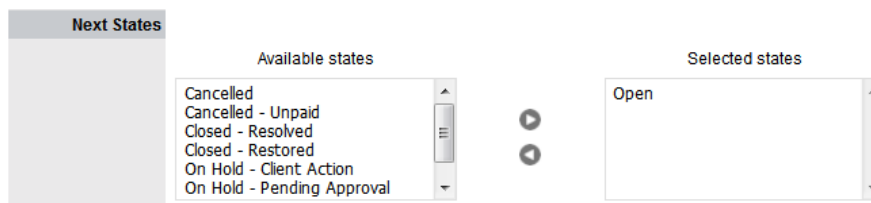


### ***If this State is a transitional State (i.e., not an Entry Point or Exit Point), where can the request come from when moving into this stage?***

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.

**Workflow - Typical Change Workflow**

**Workflow**      **Lifecycle**      **Status**

**Status**

Name |

Active State     Yes     No

Approval State     Yes     No

Item Editable     Yes     No

***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.   |

---

---

## Approval

---

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.

|                     |                 |
|---------------------|-----------------|
| <b>Accept State</b> |                 |
| Status              | On Hold         |
| Approval            | Team Manager    |
| <b>Reject State</b> |                 |
|                     | Customer        |
|                     | Line Manager    |
|                     | Team Manager    |
|                     | 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.

| Team Information   |                            |
|--------------------|----------------------------|
| Information        | Service                    |
| Group              | States                     |
| Layers             |                            |
| TeamSMG1           |                            |
| Workflows          | Emergency Change Workflow  |
| States             | Emergency Change Workflow  |
|                    | Change Deployment Workflow |
| Name               | Assigned Groups            |
| Cancelled          | Default Group              |
| Cancelled - Unpaid | Default Group              |

## Workflows Applied

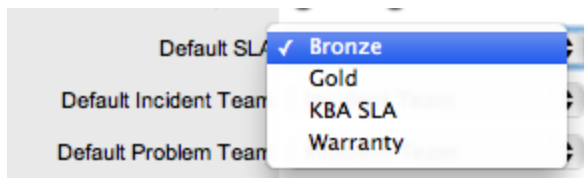
The final piece of the Workflow puzzle is to ensure that the correct Workflow is available when a request is created. To achieve this, in addition to assigning the request to the appropriate Team, the following configuration needs to be completed:

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.

---

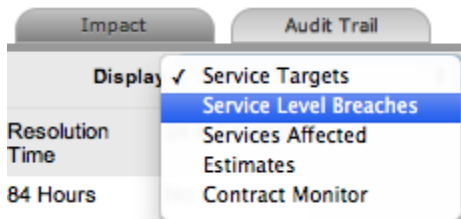
**NOTE:** Note: Failure to assign an SLA results in the system default settings being applied, which are configured in the administration console within the Setup>Privileges>Requests tab.

---



## 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

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.

| Name              | System | Description |
|-------------------|--------|-------------|
| Technical Problem | Yes    |             |

## 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:

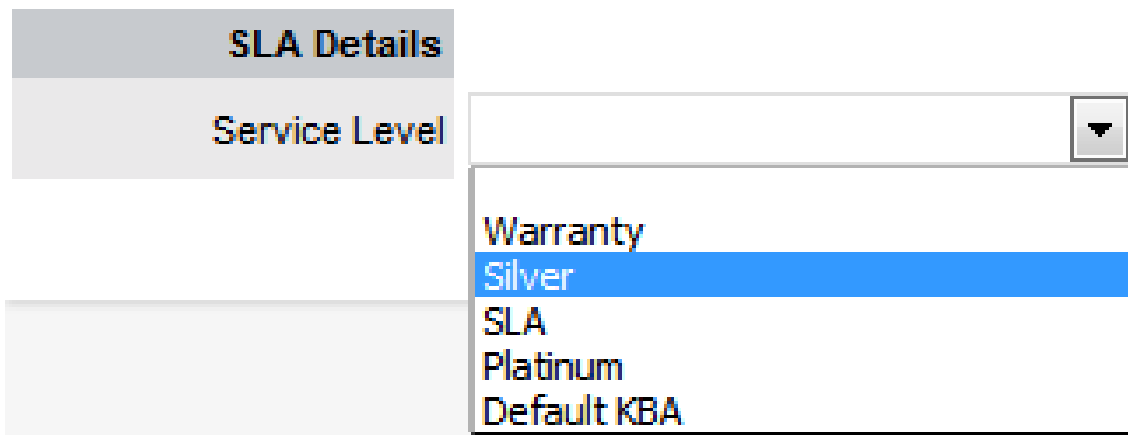
1. If the Customer has an SLA then assign this to the request
2. If the Customer does not have an SLA but the Organizational Unit does, assign this to the request
3. If the Customer or Organizational Unit does not have an SLA but the Item does, then assign this to the request
4. If none of the above 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.

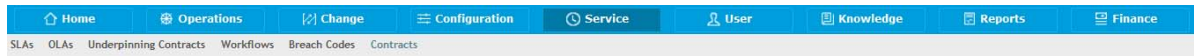
## Assigning an SLA to a Request - Only when Billing is enabled

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 710
- ♦ “Contract Assignment” on page 713
- ♦ “Pending Contracts” on page 723

### 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
6. Select a Service Level from the list

(If Invoices are enabled in the system, an Invoice number will be automatically generated and assigned to the Contract).

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.

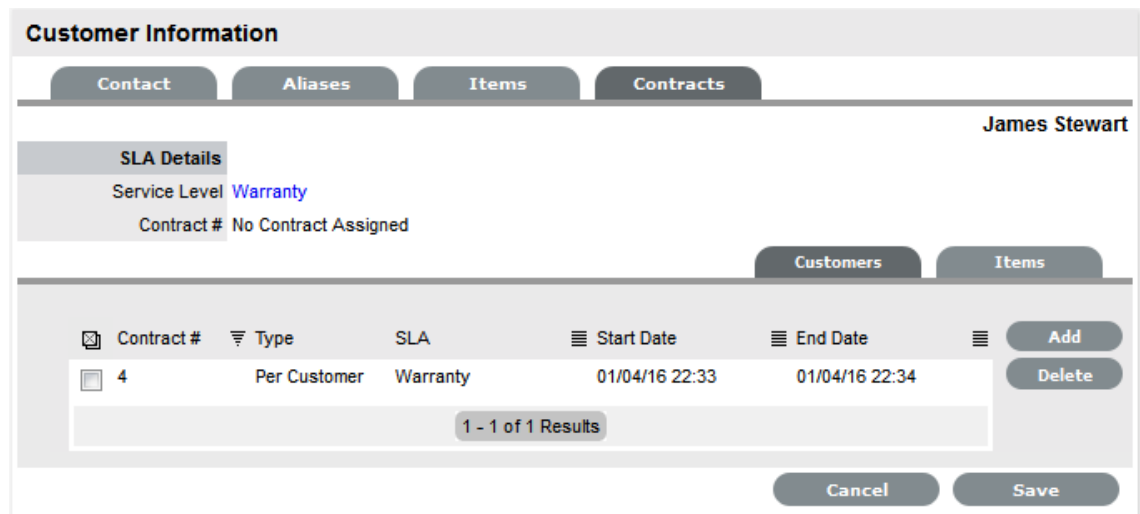
(If a Contract is forward dated with a Start Date set in the future, the Pending Contract status is assigned.

8. Add any relevant Invoice Notes
9. Check the Taxable box, if the Contract is to be taxed
10. Click Save

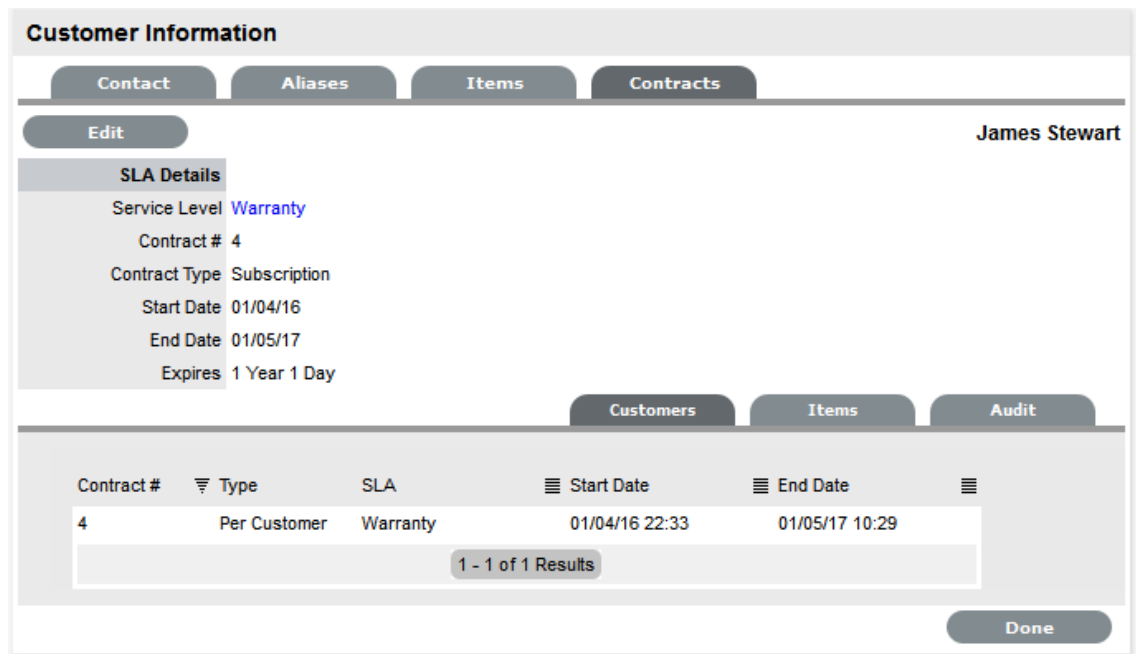
If invoices are enabled and a cost is associated with the SLA, a Warning message is displayed prompting that the invoice needs to be processed by a Finance User before the contract will become available in the system. The invoice can be processed in the Finance >Invoices tab.



11. Click Next to continue  
The system reverts to the Contracts summary screen



12. Click Save. Click 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 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

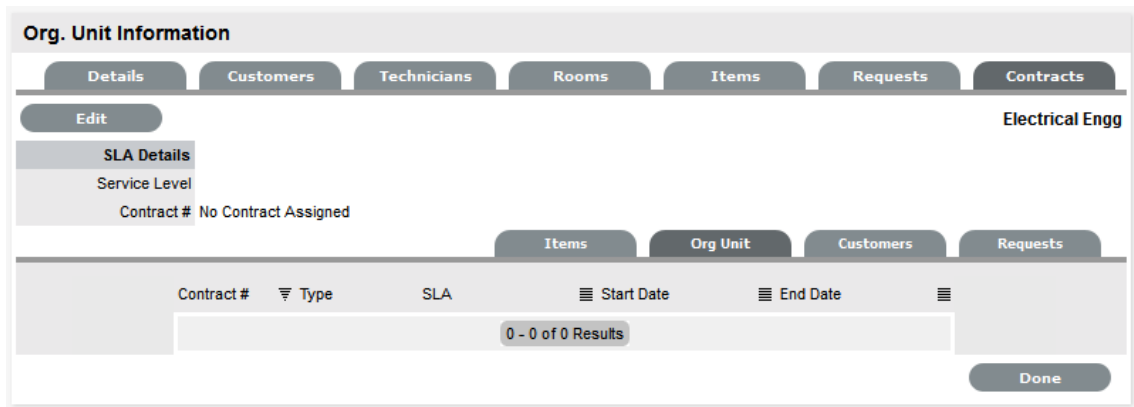
Organizational Units' Contract history is stored within the Contracts tab of the Org. Unit Information screen. All Contracts, valid and expired, are listed within the Org. Unit, Customer and Items tab of the Contracts tab.

**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

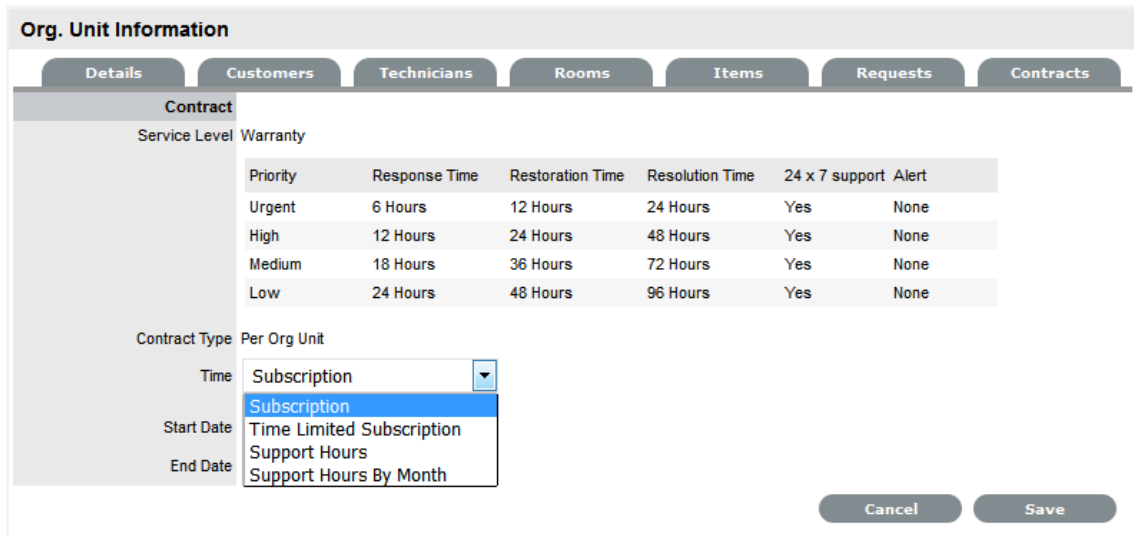
The Add and Delete buttons become available with the Contracts>Org Unit tab.

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 'Save'. The 'SLA Details' section is the same, but the 'Enable Contract' button is now disabled. The table of contracts is identical. 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 |      |     |            |          |

Delete
Cancel
Save

Add  
Delete

4. Click Add

(If Invoices are enabled in the system, an Invoice number will be automatically generated and assigned to the Contract).

**Item Information**

Information Details Costs Requests Relationships Outages AMIE Snapshots

**Contract**

Invoice Number 100016

Service Level

Cancel

5. Select an SLA from the drop-down option

The screen will display the SLA details and the Contract Type locked to Per Item.

**Item Information**

Information Details Costs Requests Relationships Outages AMIE Snapshots

**Contract**

Invoice Number 100016

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 Item

Time

Start Date

End Date

Notes

Price \$0.00

Tax \$0.00

Taxable

Total Cost \$0.00

Cancel Save

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.



The screenshot shows a window titled "Contract Information" with "Contract # 8" in the top right corner. The window is divided into two sections: "Details" and "Ownership".

| 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                          |
|               | <a href="#">Cancel Contract</a> |

Below the "Details" section is the "Ownership" section:

| Ownership |              |
|-----------|--------------|
| Customer  | Laura Morris |

A red arrow points to the "Cancel Contract" hyperlink.

3. Click the Cancel Contract hyperlink  
A Cancel Reason text box is displayed.
4. Enter an explanation for canceling the Contract

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 725](#)
- ◆ [Section 2.8.2, "Organizational Units," on page 735](#)
- ◆ [Section 2.8.3, "Partner Organizations," on page 748](#)
- ◆ [Section 2.8.4, "Users," on page 752](#)
- ◆ [Section 2.8.5, "Teams," on page 766](#)
- ◆ [Section 2.8.6, "Assignments," on page 793](#)

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.

---

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## Customer Information Fields

---

|              |  |
|--------------|--|
| Org. Unit    | <p>The Organizational Unit, be it a Company or Department with which the Customer is associated.</p> <p>(Organizational Units are created by the Supervisor, in Users &gt;Organizational Units.)</p>   |
| Line Manager | <p>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.)</p>   |
| Room         | <p>This field is visible if the Display Rooms option is set to Yes in the Setup&gt;Privileges&gt;Customer screen and there are Room details configured in Organizational Units.</p>  |
| Address 1    | <p>First line of Customer's address.</p>   |
| Address 2    | <p>Second line of Customer's address.</p>  |
| City         | <p>Customer's city details</p>   |
| State        | <p>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.</p>   |
| Zip/Postcode | <p>Customer's area code.</p>   |
| Country      | <p>Customer's country. The country selected will determine the time zone and state options for the Customer.</p>   |
| Email Locale | <p>Set the default language for email correspondence.</p>  |
| Phone        | <p>Enter Phone details.</p>  |
| Fax          | <p>Enter the Customer's fax number, if relevant.</p>   |
| Pager        | <p>Enter the Customer's pager details, if relevant.</p>  |
| 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"><li>1. From the drop-down list, select the SMS Service Provider.</li><li>2. Override SMS Address. If your service provider does not appear in the list, click this checkbox and enter an alternate Service Provider.</li></ol> |

---

---

## Customer Information Fields

---

|                |   |
|----------------|---|
| 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@smgateway.provider.com.  |
| Partner        |   |
| Customer of    | Nominate the Partner Organization associate with the Customer. This is an external service provider who manages the Customer's request.<br><br>(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.) |
| 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.<br><br>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.<br><br><b>NOTE:</b> 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

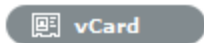
1. Click Done.

#### 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

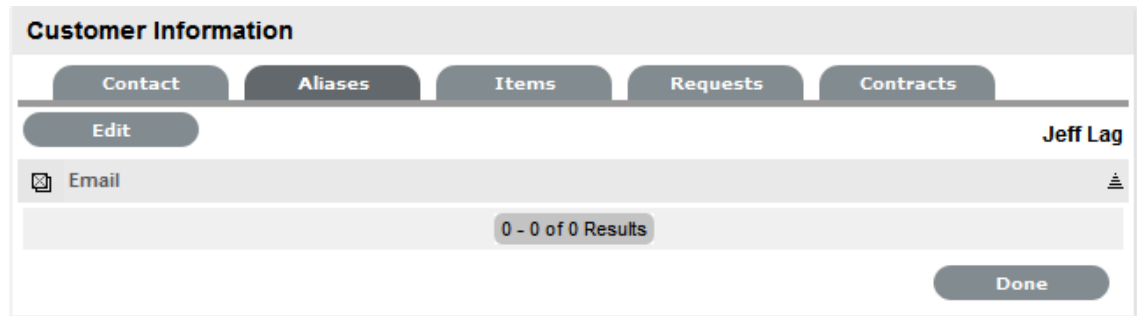
The Aliases tab is used to enter additional email addresses. Email addresses in the Aliases tab allow the Customer to send emails to the System or Team support addresses from more than one address. The system creates requests from these emails. Notifications for requests created using an address in the 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.

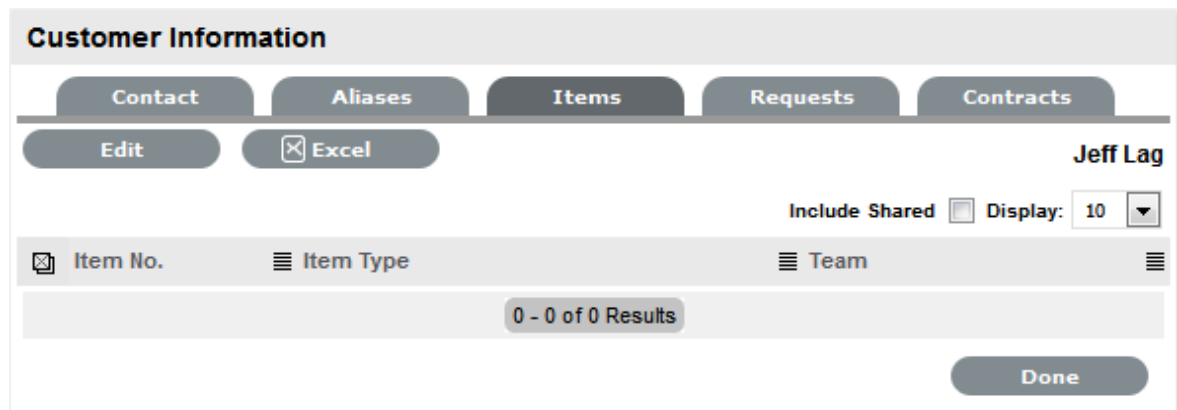
When an alias email address has been created for a Customer, a Send To field is displayed on the Customer Information screen, which allows the alias email address to be set as the default address applied to Customer correspondence.



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.

The screenshot shows the 'Customer Information' section with tabs for Contact, Aliases, Items, Requests, and Contracts. The 'Requests' tab is active. There are buttons for 'Excel' and 'New'. The user name 'Jeff Lag' is displayed. A filter dropdown is set to 'All Tasks [sys]' and the display count is '10'. A table header includes columns for Task #, Process, Date, Status, Technician, and Problem Report. Below the table, it shows '0 - 0 of 0 Results' and a 'Done' 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 with tabs for Contact, Aliases, Items, Requests, and Contracts. The 'Contracts' tab is active. There is an 'Edit' button and the user name 'Andy Fair' is displayed. Under the 'Contract' section, it shows 'Service Level Warranty' and 'Contract # No Contract Assigned'. Below this, there are tabs for 'Customers' and 'Items'. A table header includes columns for Contract #, Type, SLA, Invoice #, Start Date, and End Date. A single row is visible with Contract # 3, Type Per Customer, SLA Warranty, Invoice # 100004, Start Date 01/05/16 12:01, and End Date 01/06/16 11:09. Below the table, it shows '1 - 1 of 1 Results' and a 'Done' button.

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 a mobile application interface for "Customer Information". At the top, there are tabs for "Contact", "Aliases", "Items", "Requests", and "Contracts". Below the tabs is an "Edit" button and the name "Paul Pedron". A "Contract" section is visible, showing "Service Level" and "Contract # No Contract Assigned". Below this is a table with columns: "Contract #", "Type", "SLA", "Invoice #", "Start Date", and "End Date". The table currently displays "0 - 0 of 0 Results". At the bottom right, there is a "Done" button.

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**

Contract 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

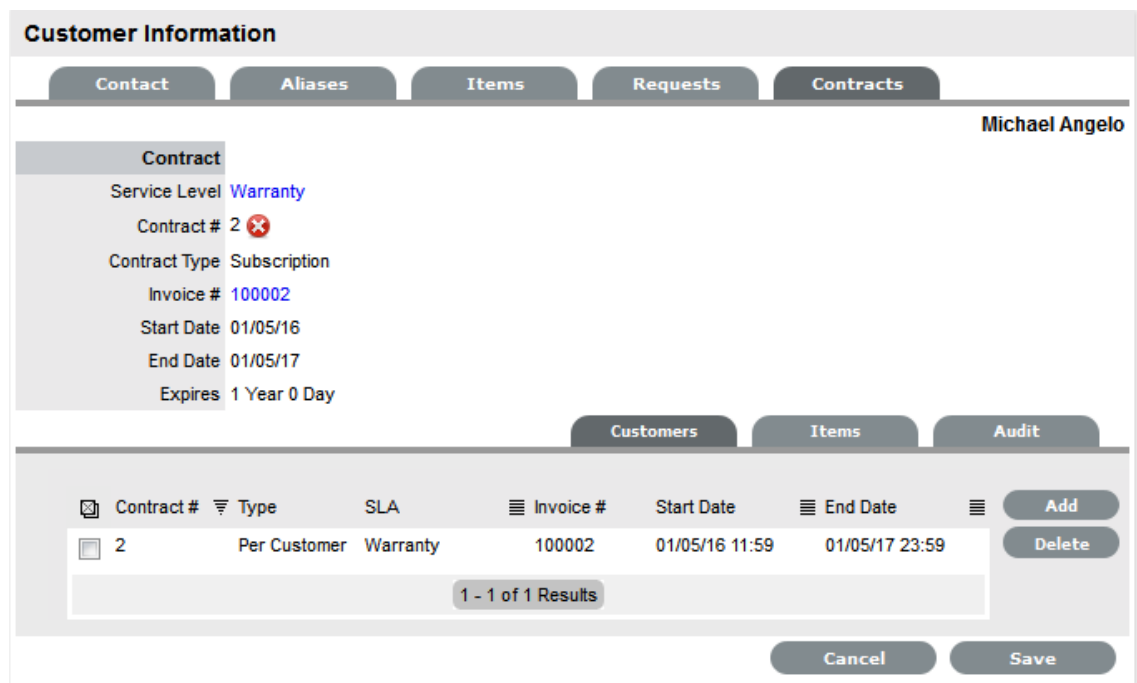
If *Support Hours By Month* is selected, define the number of Support Hours covered per month and on which day of the month the Contract is designated as the Rollover Day. The Start Date and End Date fields are automatically completed as an annual contract subscription but can be edited, as required.

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.



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.

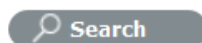
The Items tab within the Customer>Contracts screen is used to list all the Items with a Contract that are owned by a Customer.

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.

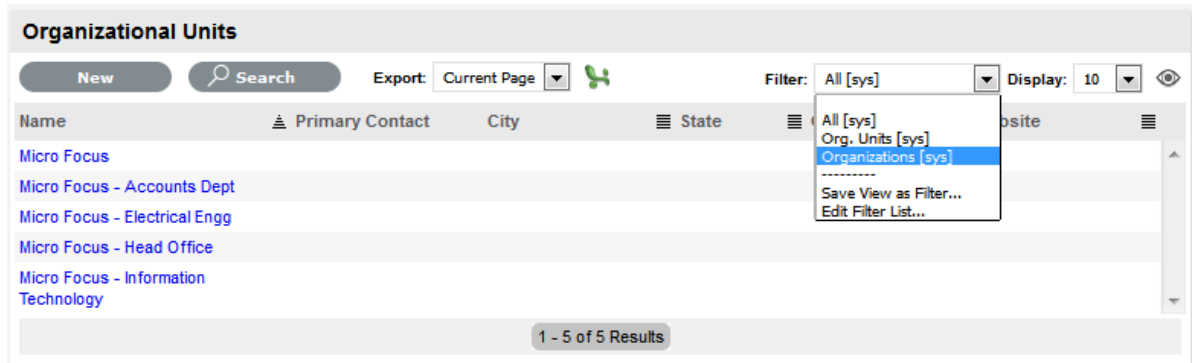
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### Organizational Unit Filters

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.

The screenshot shows the configuration form for authentication server settings. It includes the following fields and options:

- Customer Orgs:** Radio buttons for 'Yes' (selected) and 'No'.
- Company:** Radio buttons for 'Standard' (selected) and 'Custom'. Below it is a dropdown menu with 'company' selected.
- Department:** Radio buttons for 'Standard' (selected) and 'Custom'. Below it is a dropdown menu with 'department' selected.

**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

**Org. Unit Information**

Details Customers Technicians Items Requests Contracts

**Information**

Name

Org. Unit Type

Org. Unit Code

Address 1

Address 2

City

Zip

Country

Phone

URL

Email

**Notes**

**Handshaking**

Override  Yes  No

**Partner**

Customer of

Cancel Save

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:

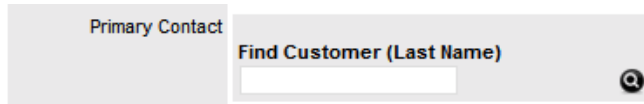
1. Select User>Organizational Units

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)



The screenshot shows a section titled "Primary Contact" with a search box labeled "Find Customer (Last Name)". The search box is empty and has a magnifying glass icon on the right side.

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.

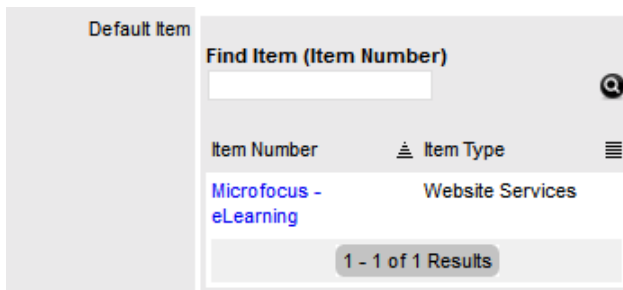
To assign a Default Item:

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.



The screenshot shows a section titled "Default Item" with a search box labeled "Find Item (Item Number)". Below the search box is a table with two columns: "Item Number" and "Item Type". The table contains one row with the item "Microfocus - eLearning" and the type "Website Services". At the bottom of the table, it says "1 - 1 of 1 Results".

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.

| 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          |

## 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

The screenshot shows the 'Org. Unit Information' interface with several tabs: Details, Customers, Technicians, Departments, Items, Requests, and Contracts. The 'Technicians' tab is active. Below the tabs, there is a 'Micro Focus' label. The main area contains an 'Available Technicians:' dropdown menu with a list of names: Craig Wilson, Ingo Engels, Joe K, Kamal K, Sankar R, and Vaibhav Jain. The 'Craig Wilson' option is currently selected. To the right of the dropdown are 'Cancel' and 'Save' buttons. Below the dropdown, there is a table with columns for 'Technician' and 'Email'. The table contains one entry for 'Joe K' with the email 'joe@nsd.com'. At the bottom right of the table, it says '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



**Org. Unit Information**

Details Customers Technicians **Departments** Items Requests Contracts

New Micro Focus

| Department Name                      | Primary Contact | Phone |
|--------------------------------------|-----------------|-------|
| Micro Focus - Accounts Dept          | Anil k          |       |
| Micro Focus - Electrical Engg        |                 |       |
| Micro Focus - Head Office            |                 |       |
| Micro Focus - Information Technology |                 |       |

1 - 4 of 4 Results

Done

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.

**Information**

The Department was added successfully. You may now add Rooms.

**Org. Unit Information**

Details Customers Technicians **Rooms** Items Requests Contracts

Edit MicroFocus Dept1

| Information  | Notes |
|--|-------|
| Name: Micro Focus - MicroFocus Dept1<br>Org. Unit Type: Department |       |

9. Select the Rooms tab if Rooms are to be added immediately
10. Click Edit
11. Select New

**Org. Unit Information**

Details Customers Technicians **Rooms** Items Requests Contracts

Edit a

Room Name

0 - 0 of 0 Results

Done

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.

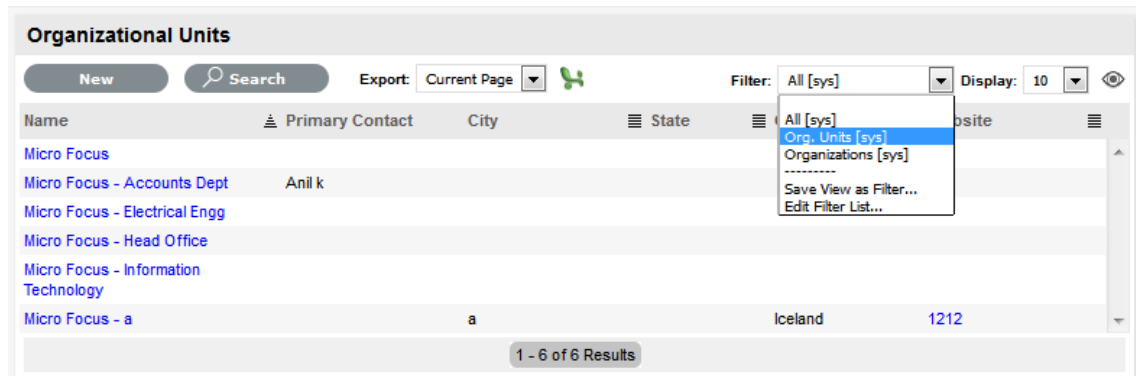
## Rooms Tab

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:

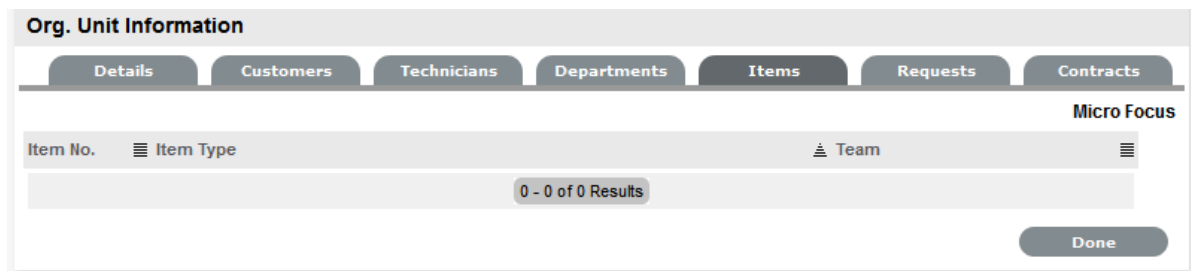
1. Within the Organizational Units list select the Org.Units filter



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.

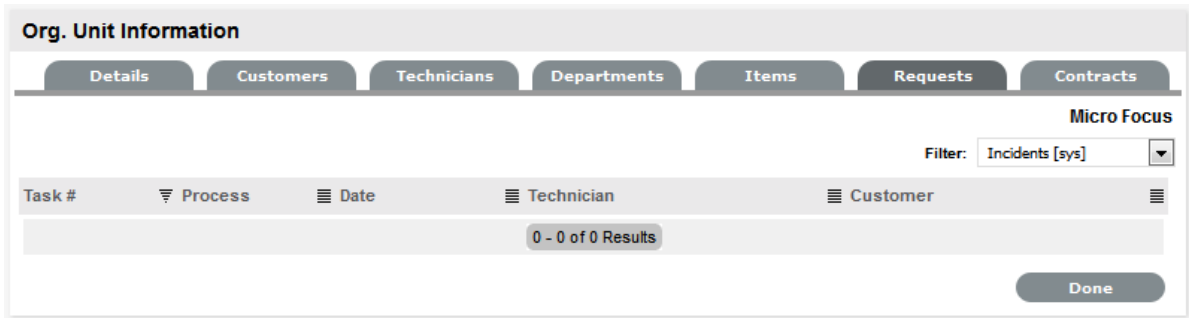
## Items Tab

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.



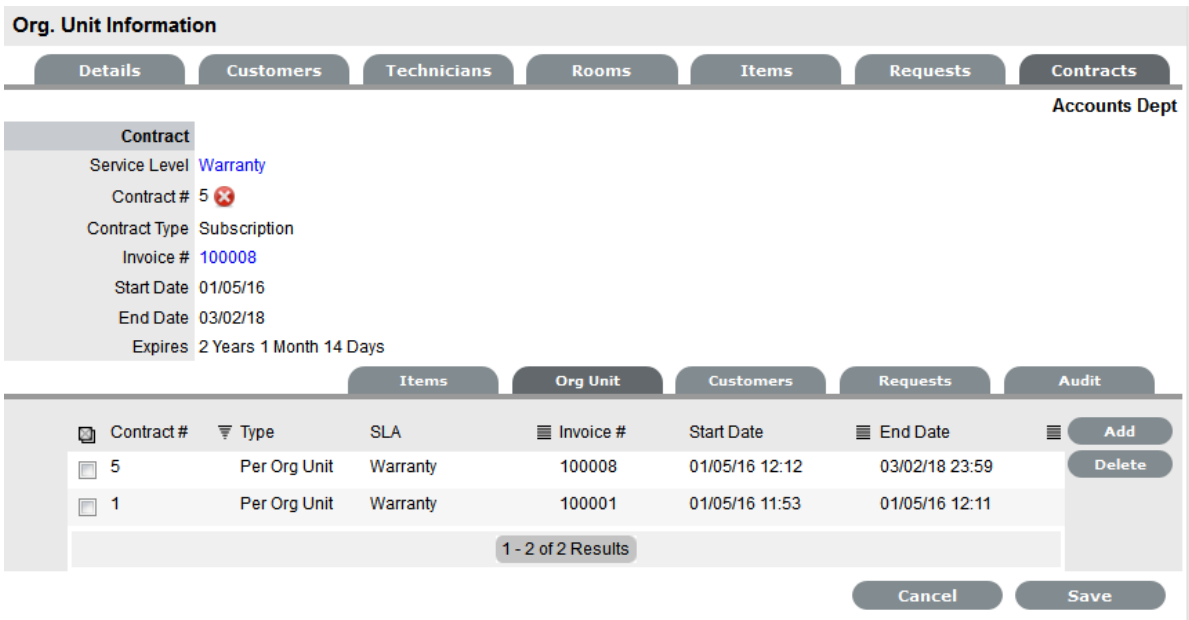
## Contracts Tab

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 Contract.

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.



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

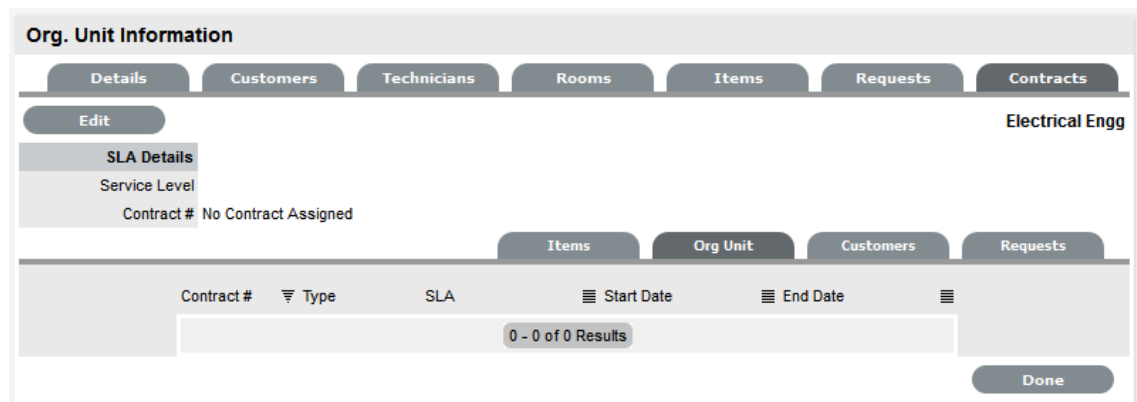
The Find Customer box is displayed. (Note that this search is only visible when customers have been assigned to the org unit)



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.

| 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  |

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.

**Org. Unit Information**

Details Customers Technicians Rooms Items Requests Contracts

Accounts Dept

**SLA Details**

Service Level [Warranty](#)

Contract # No Contract Assigned

Pending Contract # 5 [Enable Contract](#)

Items Org Unit Customers Requests

| 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 |

1 - 2 of 2 Results

Cancel Save

10. Click Save

To process the contract before the set Start Date select the Enable button.

**Org. Unit Information**

Details Customers Technicians Rooms Items Requests Contracts

Edit

Accounts Dept

**SLA Details**

Service Level [Warranty](#)

Contract # No Contract Assigned

Pending Contract # 5 [Enable Contract](#)

Items Org Unit Customers Requests


| 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 |

1 - 2 of 2 Results

Done

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.

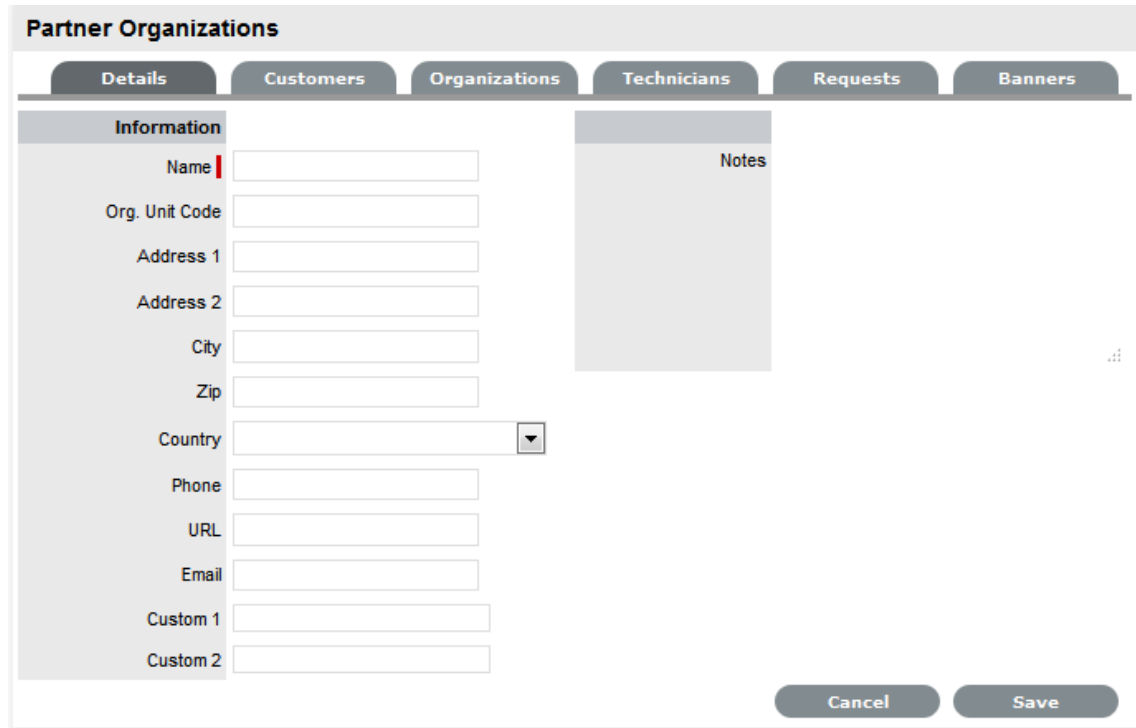
The Partner Organization capability also allows the banner within the Customer Portal for Customers associated with the Partner Organization, to be branded for the Partner Organization.



## 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 five tabs: "Details", "Customers", "Organizations", "Technicians", and "Banners". The "Details" tab is currently selected. Under the "Details" tab, there is an "Information" section on the left and a "Notes" section on the right. The "Information" section contains 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. The "Notes" section is a large text area. 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      | <a href="mailto:andy@nsd.com">andy@nsd.com</a>       |       | Micro Focus - Head Office            |
| Anil k         | <a href="mailto:anil@nsd.com">anil@nsd.com</a>       |       | Micro Focus - Accounts Dept          |
| Ashley Adam    | <a href="mailto:aav@nsd.com">aav@nsd.com</a>         |       | Micro Focus                          |
| Guruprasad S   | <a href="mailto:guru@nsd.com">guru@nsd.com</a>       |       | Micro Focus - Electrical Engg        |
| James Stewart  | <a href="mailto:james@nsd.com">james@nsd.com</a>     |       | Micro Focus - Information Technology |
| Jason Blackett | <a href="mailto:jason@nsd.com">jason@nsd.com</a>     |       | Micro Focus - Information Technology |
| Jeff Lag       | <a href="mailto:jeff@nsd.com">jeff@nsd.com</a>       |       | Micro Focus - Head Office            |
| Michael Angelo | <a href="mailto:michael@nsd.com">michael@nsd.com</a> |       | Micro Focus - SMG                    |
| Paul Pedron    | <a href="mailto:paul@nsd.com">paul@nsd.com</a>       |       | Micro Focus - Head Office            |
| Sachin Kumar   | <a href="mailto:sachin@nsd.com">sachin@nsd.com</a>   |       | 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

The screenshot shows the 'Partner Organizations' interface with the 'Technicians' tab selected. The interface includes a header with tabs for 'Details', 'Customers', 'Organizations', 'Technicians', 'Requests', and 'Banners'. Below the tabs is a section for 'Available Partners' with a dropdown menu, 'Cancel', and 'Save' buttons. A 'Technician' field with an 'Email' icon is visible. At the bottom, it shows '0 - 0 of 0 Results'.

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.

The screenshot shows the 'Partner Organizations' interface with the 'Requests' tab selected. The interface includes a header with tabs for 'Details', 'Customers', 'Organizations', 'Technicians', 'Requests', and 'Banners'. Below the tabs is a table with columns for 'Task #', 'Process', 'Date', 'Technician', and 'Customer'. A single row is visible with Task # 100010, Process Incident, Date 06/20/16, Technician Michel, and Customer Simon Super. A 'Filter: All Tasks [sys]' dropdown is visible. At the bottom, it shows '0 - 0 of 0 Results' and a 'Done' button.

| Task #                 | Process  | Date     | Technician             | Customer                    |
|------------------------|----------|----------|------------------------|-----------------------------|
| <a href="#">100010</a> | Incident | 06/20/16 | <a href="#">Michel</a> | <a href="#">Simon Super</a> |

## Banners

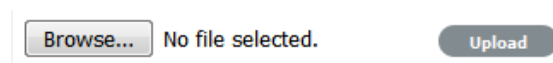
Within the Banners tab, a banner that brands the Partner Organization can be uploaded. This will override the system Customer Portal banner within Customer Portals for Customers associated with the Partner Organization. The graphic should be 500x70 pixels and PNG format.


### 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 753](#)
- ♦ [“Creating a User Account” on page 753](#)
- ♦ [“Information Tab” on page 753](#)
- ♦ [“Schedule Tab” on page 758](#)
- ♦ [“Aliases Tab” on page 760](#)
- ♦ [“Team Tab” on page 761](#)
- ♦ [“Skills Tab” on page 763](#)
- ♦ [“Org Units” on page 764](#)

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.<br><br>Every Technician Role assigned also needs a Supervisor assigned.<br><br><b>NOTE:</b> 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.<br><br><b>NOTE:</b> 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.<br><br>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.<br><br>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.  |

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---

## 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><b>NOTE:</b> 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"><li>◆ From the drop down list, select the SMS service provider.</li><li>◆ Override SMS Address. If your service provider does not appear in the list, click this checkbox and enter an alternate Service Provider.</li></ul> |
| 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@smgateway.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&gt;Setup&gt;Privileges&gt;User screen and the User is not on vacation, the system will consider them to be unavailable.</p>  |

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## User Information Fields

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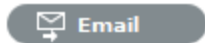
|              |   |
|--------------|---|
| Assignment   | <b>**Visible when the Assignment Control is enabled in Admin&gt;Setup&gt;Privileges&gt;User.</b><br><br>Set to Off if the User is not to be assigned new requests, irrespective of their Availability status. |
| On Vacation  | Placing a Technician 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

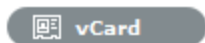
1. Complete the User detail information
2. Click Done.

## 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' window for 'Ingo Engels'. The 'Schedule' tab is selected. 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 is a table with columns: Purpose, Start Date, End Date, and Active. The table currently shows '0 - 0 of 0 Results'. At the bottom right are 'Cancel' and 'Save' buttons.

### 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.

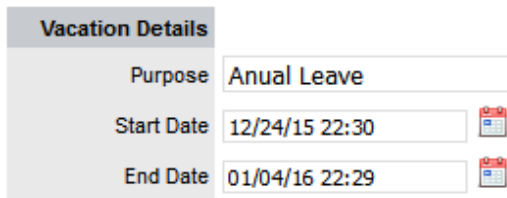
---

### 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.

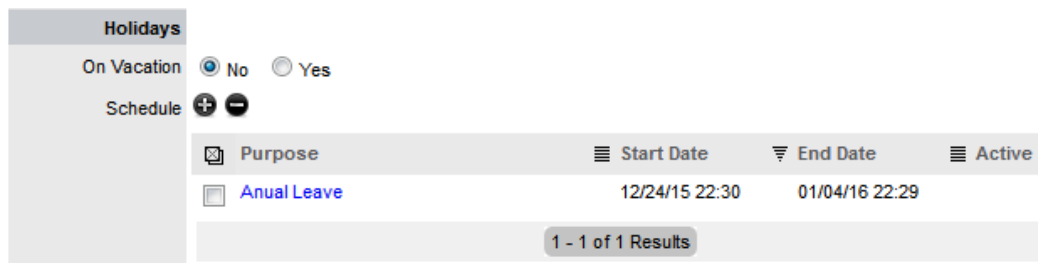
As a Supervisor User, to schedule User leave:

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.



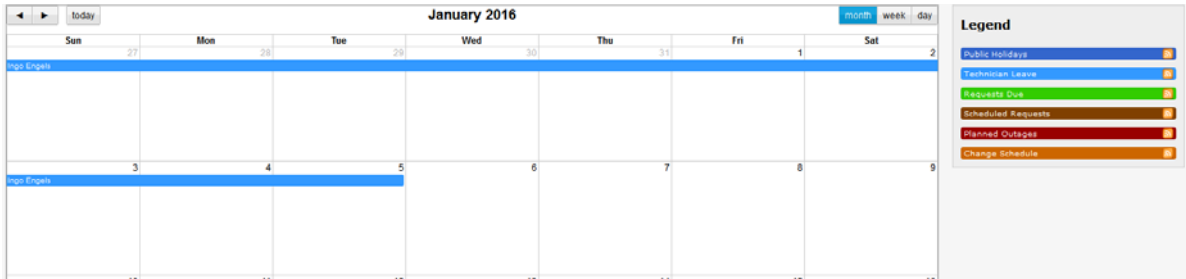
| Purpose      | Start Date     | End Date       | Active |
|--------------|----------------|----------------|--------|
| Annual Leave | 12/24/15 22:30 | 01/04/16 22:29 |        |

---

**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 with the 'Team' tab selected. The user name 'Ingo Engels' is displayed in the top right. Below the tabs, there is a section for adding a team. It includes a dropdown menu labeled 'Add By' with 'Team' selected. Below this, a list of teams is shown with radio buttons: 'BYOD-Incident-Team' and 'Change Management Team'. To the right, there is a search field labeled 'Find Team (Name)' with a magnifying glass icon. Below the search field is a checkbox labeled 'Assign new user to layer one'. At the bottom right, there are '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 menu is set to 'Team Template'. Below it, the 'Templates' dropdown menu is set to 'New Template'. A table with one row is visible, showing 'Team Name' and 'Layer'. The user's name, 'Ingo Engels', is displayed in the top right corner. 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 'Skills' tab interface. At the top, there's a 'User Information' header with tabs for 'Information', 'Schedule', 'Aliases', 'Team', 'Skills', and 'Org Unit'. The 'Skills' tab is selected. Below the tabs, the user name 'Ingo Engels' is displayed. There is an 'Item Category' dropdown menu, 'Cancel' and 'Save' buttons, and a table 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.

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.



**Find Customer**

First Name  Email

Last Name  Phone

Username  Org. Unit

Supported Org. Units Only

## 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

**User Information**

Information Schedule Aliases Team Skills **Org Unit**

Ingo Engels

Org. Units

Find Org. Unit (Name)

Cancel Save

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 767](#)
- ♦ [“Creating an Incident or Problem Team” on page 767](#)
- ♦ [“Creating and Configuring Additional Escalation Layers” on page 772](#)
- ♦ [“Editing an Escalation Layer” on page 773](#)
- ♦ [“Configuration of Escalation Layers” on page 773](#)
- ♦ [“Creating a Service or Change Request Team” on page 774](#)
- ♦ [“Service Portfolio Team” on page 784](#)
- ♦ [“Release & Deployment Team” on page 788](#)

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](#)

| Teams                  |                 |                   |      |                      |       |                          |             |
|------------------------|-----------------|-------------------|------|----------------------|-------|--------------------------|-------------|
| New                    |                 | Search            |      | Export: Current Page |       |                          | Display: 10 |
| 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

### Team Information

Information
Service

#### Details

Team Name

Process Incident

Team Lead

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

#### 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

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.  |
| 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.  |

| Options                 | Description  |
|-------------------------|--|
| Customer Notification   | <p>Sets the default notification method applied to requests for Customer correspondence, when requests are assigned to this Team.</p> <p>The Customer Defined option, derives the method of notification from the setting within the Customer's Profile or Account Information tab.</p>  |
| Technician Notification | <p>Sets the default notification method applied to requests for Technician correspondence, when requests are assigned to this Team.</p>  |
| Live Priority           | <p>Routes requests to Technicians who belong to the Team and logged into the system.</p>   |
| Self Assign             | <p>When enabled, requests created by a Technician will automatically be assigned to that Technician.</p>   |
| Notify on New           | <p>Determines who is informed about the creation of a new request.</p> <p><i>Technician</i> - notifies only the Technician assigned to the request.(This is the default setting.)</p> <p><i>Layer</i> - notifies all members in Layer One of the Team assigned to the request.</p> <p><i>Select Team</i> - notifies all technicians in the Team.</p> |
| Notify on Update        | <p>Determines who is informed when a request is updated.</p> <p><i>Technician</i> - notifies only the Technician assigned to the request.(This is the default setting.)</p> <p><i>Layer</i> - notifies all members in Layer One of the Team assigned to the request.</p> <p><i>Select Team</i> - notifies all technicians in the Team.</p>           |
| Notify on Escalate      | <p>Determines who is informed when a request is escalated.</p> <p><i>Technician</i> - notifies only the Technician assigned to the request.(This is the default setting.)</p> <p><i>Layer</i> - notifies all members in Layer One of the Team assigned to the request.</p> <p><i>Select Team</i> - notifies all technicians in the Team.</p>         |

| 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

10. Assign the relevant OLA's within Available OLA's list (Optional)

Highlight the Team Name and click the arrow icon to move an OLA to Selected OLA's 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

**Team Information**

Information Service **Layers**

Escalations

| Order | Name          | Assigned Technicians        |
|-------|---------------|-----------------------------|
| 1     | Layer 1       | Craig Wilson                |
| 2     | Default layer | Ingo Engels<br>Craig Wilson |

1 - 2 of 2 Results

Cancel New Save

TeamSMG

19. To delete a Layer, select the Layer Name
20. Click the Delete button and Save.

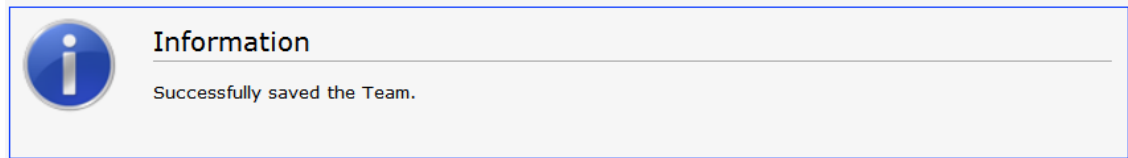
## Creating and Configuring Additional Escalation Layers

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.



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

**Members**

Technicians

Available Technicians

- Craig Wilson
- Ingo Engels
- Joe K
- Kamal K
- Sankar R
- Vaibhav Jain

Selected Technicians

None selected

**Location**

Address

City

State

Zip

Country

Phone

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.  |
| 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.  |

| Options                 | Description  |
|-------------------------|--|
| Customer Notification   | Sets the default notification method applied to requests for Customer correspondence, when requests are assigned to this Team.<br><br>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.<br><br><i>Technician</i> - notifies only the Technician assigned to the request. (This is the default setting.)<br><br><i>Layer</i> - notifies all members in Layer One of the Team assigned to the request.<br><br><i>Select Team</i> - notifies all members of the Team. |
| Notify on Update        | Determines who is informed when a Request is updated.<br><br><i>Technician</i> - notifies only the Technician assigned to the request. (This is the default setting.)<br><br><i>Layer</i> - notifies all members in Layer One of the Team assigned to the request.<br><br><i>Select Team</i> - notifies all members of the Team.           |
| Notify on Escalate      | Determines who is informed when a Request is escalated.<br><br><i>Technician</i> - notifies only the Technician assigned to the request. (This is the default setting.)<br><br><i>Layer</i> - notifies all members in Layer One of the Team assigned to the request.<br><br><i>Select Team</i> - notifies all members of the Team.         |

| Options  | Description  |
|--|--|
| Request Queue<br>(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<br>(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<br>(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<br>(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 Selected OLAs  
No OLAs available None selected

**Workflows**

Workflows Available Workflows Selected Workflows

Change Deployment Workflow  
Emergency Change Workflow  
Typical Change Workflow

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 |
|---------------------------------------|----------------------|-------------------|------------|
| <a href="#">Default Group</a>         | Ingo Engels          |                   | Technician |
| <a href="#">Default Manager Group</a> |                      | Senthil K         | Manager    |
| <a href="#">Group12</a>               |                      | 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 |
|---|-----------------|
| <a href="#">Cancelled</a>               | Default Group   |
| <a href="#">Cancelled - Unpaid</a>      | Default Group   |
| <a href="#">Closed (Verified) - CAB</a> | Default Group   |
| <a href="#">Closed - Resolved</a>       | Default Group   |
| <a href="#">On Hold</a>                 | Default Group   |
| <a href="#">On Hold - KBA Revise</a>    | Default Group   |
| <a href="#">Open</a>                    | Default Group   |
| <a href="#">Pending</a>                 | Default Group   |
| <a href="#">Pending - CAB</a>           | Default Group   |
| <a href="#">Pending - No Contract</a>   | 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 |

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

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

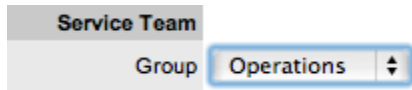
Description

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

**Members**

Technicians

Available Technicians

- Craig Wilson
- Ingo Engels
- Joe K
- Kamal K
- Sankar R
- Vaibhav Jain

**Location**

Address

City

State

Zip

Country

Phone

Selected Technicians

None selected

Cancel
Next

5. Complete the Team Location details, if required

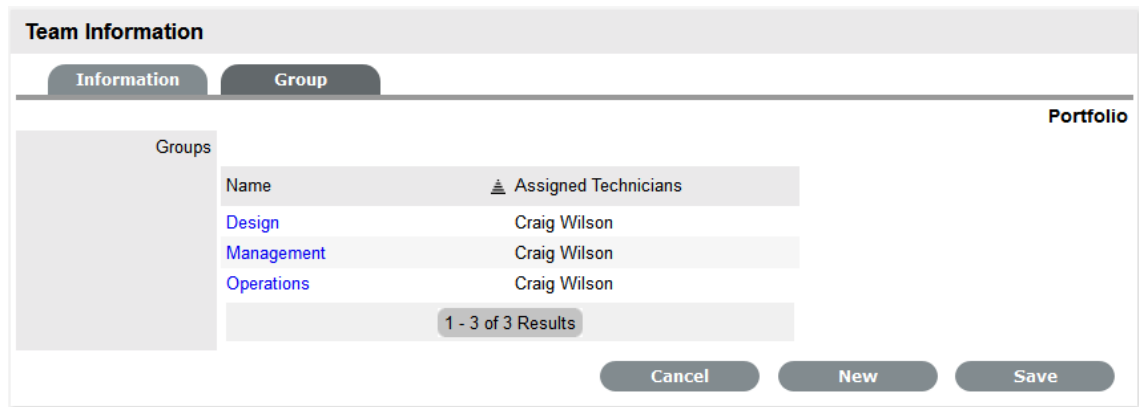
6. Select Technicians from the Available Technicians list

Highlight Technician names within the Available Technicians list and click the arrow icon to move the Users to the Selected Technicians list.

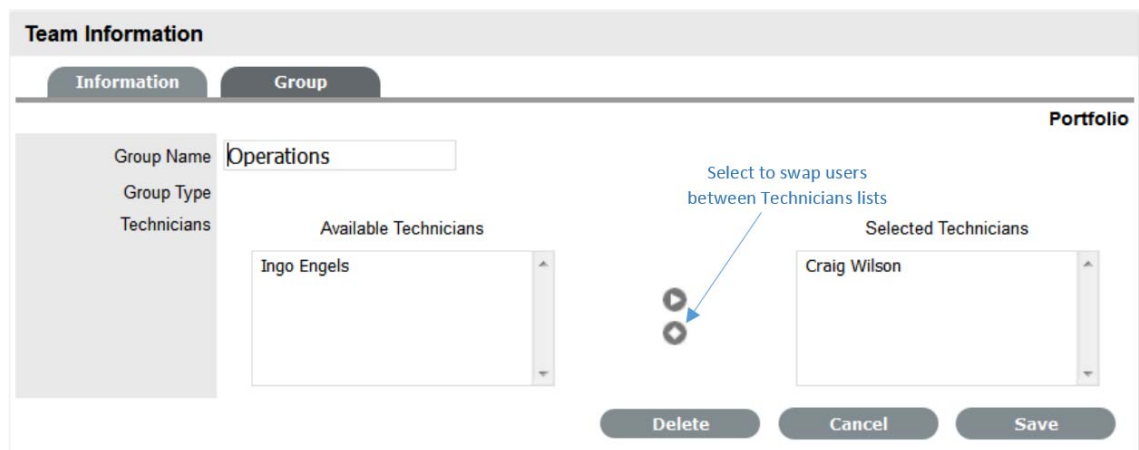
7. Set the Team Lead

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

The screenshot shows the 'Team Information' form with two tabs: 'Information' and 'Service'. The 'Details' section includes fields for Team Name (Release Team), Process (Incident), Team Lead, Incoming Email, Email Display Name, Customer Notification (Email), and Technician Notification (Email). There are also radio button options for Live Priority (Off), Self Assign (Off), and notification preferences for Technician, Layer, and Team. The 'Location' section includes fields for Address, City, State, Zip, Country, and Phone. The 'Members' section shows a list of Available Technicians (Craig Wilson, Ingo Engels, Joe K, Kamal K, Sankar R, Vaibhav Jain) and a Selected Technicians list (None selected). A right-pointing arrow icon is located between the two lists. At the bottom right, there are 'Cancel' and 'Next' buttons.

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 message 'No Workflows available') and a 'Selected Workflows' list containing 'Release Workflow'. Below these lists is a 'Default Workflow' dropdown menu also set to 'Release Workflow'. At the bottom right 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

**ReleaseT**

Group Name:

Group Type:  Technician  Manager  Deployment

Technicians

Available Technicians

- Joe K

Selected Technicians

- Ingo Engels
- Craig Wilson

Buttons: 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

**ReleaseT**

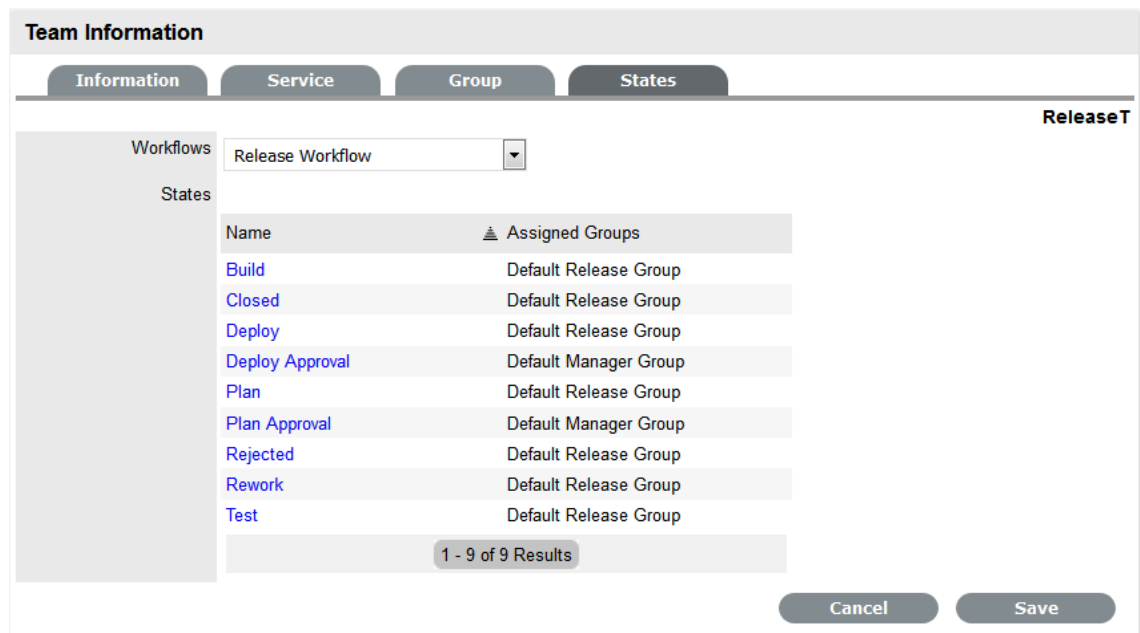
Groups

| Name                                  | Assigned Technicians        | Assigned Managers | Group Type |
|---------------------------------------|-----------------------------|-------------------|------------|
| <a href="#">Default Deploy Group</a>  | Ingo Engels<br>Craig Wilson |                   | Deployment |
| <a href="#">Default Manager Group</a> |                             | Mike S            | Manager    |
| <a href="#">Default Release Group</a> | Craig Wilson                |                   | Technician |

1 - 3 of 3 Results

Buttons: Cancel, New, Next

13. Click Next
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 793
- ◆ “Editing an Assignment Template” on page 795
- ◆ “Deleting an Assignment Template” on page 797
- ◆ “Applying Assignment Templates to New Users” on page 798
- ◆ “Applying Assignment Templates to Existing Users” on page 798

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.

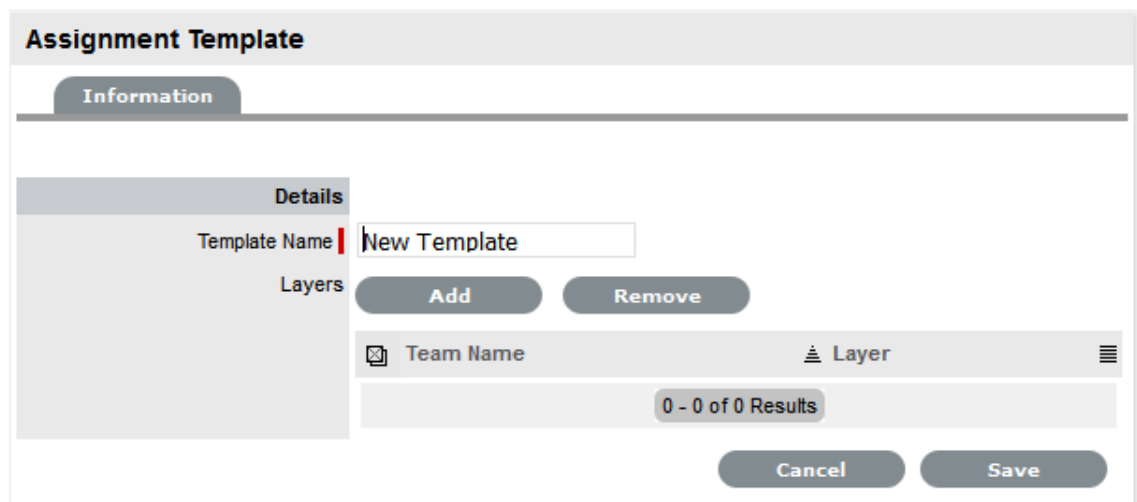
For example, a Frontline Support template may be created, where a User is assigned to Layer 1 of an Incident Team and a Work Group of a Service Request Team. They may also be assigned to an Update Customer Group within a Change Management Team. This template could then be easily applied to all Users 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

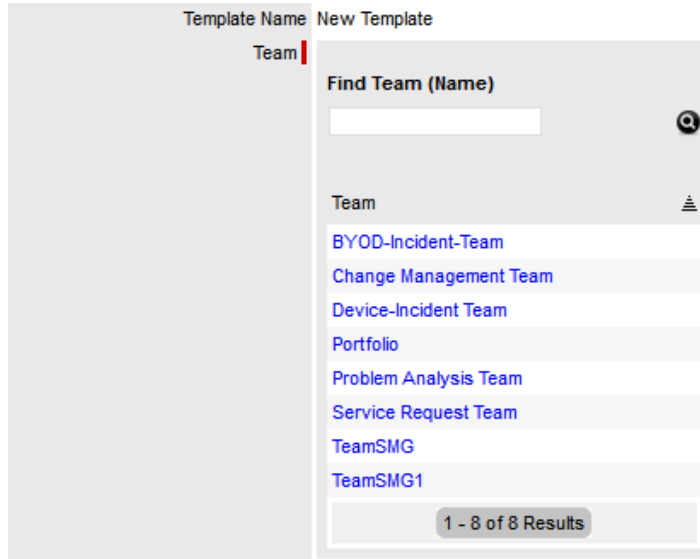


The screenshot shows the 'Assignment Template' creation interface. At the top, there is a header 'Assignment Template' and a sub-header 'Information'. Below this, there is a 'Details' section with a 'Template Name' field containing 'New Template'. Underneath, there is a 'Layers' section with 'Add' and 'Remove' buttons. Below the 'Layers' section, there is a table with columns 'Team Name' and 'Layer'. The table is currently empty, and a status bar below it shows '0 - 0 of 0 Results'. At the bottom right, 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

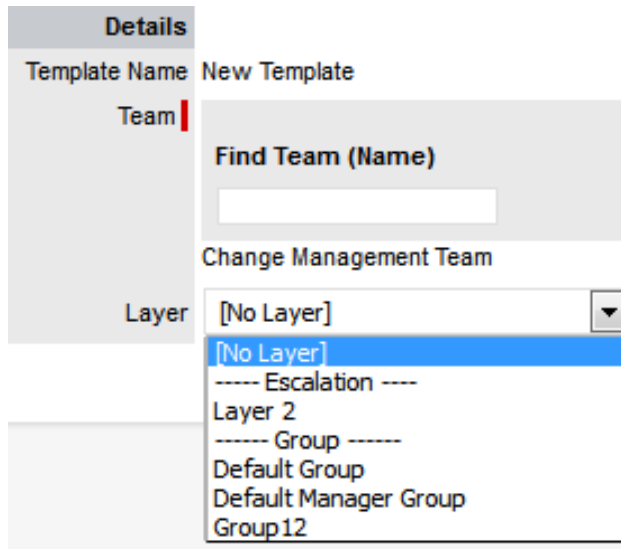
**Find Team (Name)**

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

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:

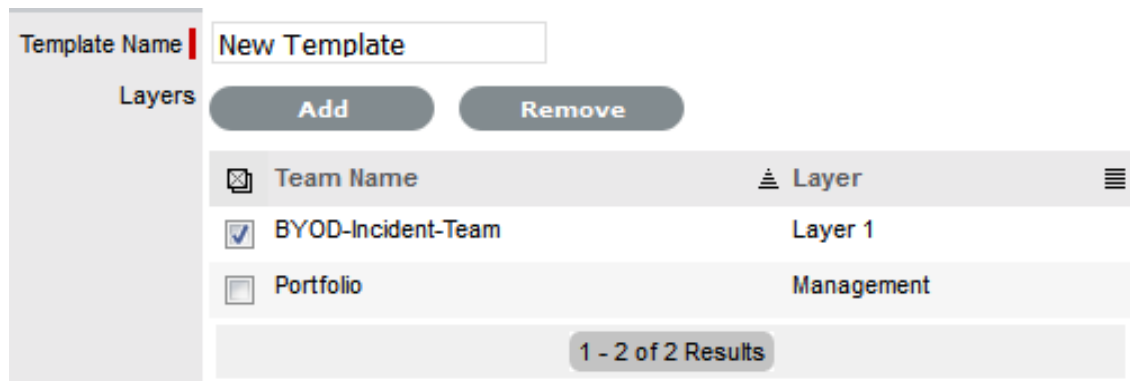
1. Select User>Assignments

| Template Name                | Owner   | Teams | Layers |
|------------------------------|---------|-------|--------|
| <a href="#">New Template</a> | Kamal K | 1     | 1      |

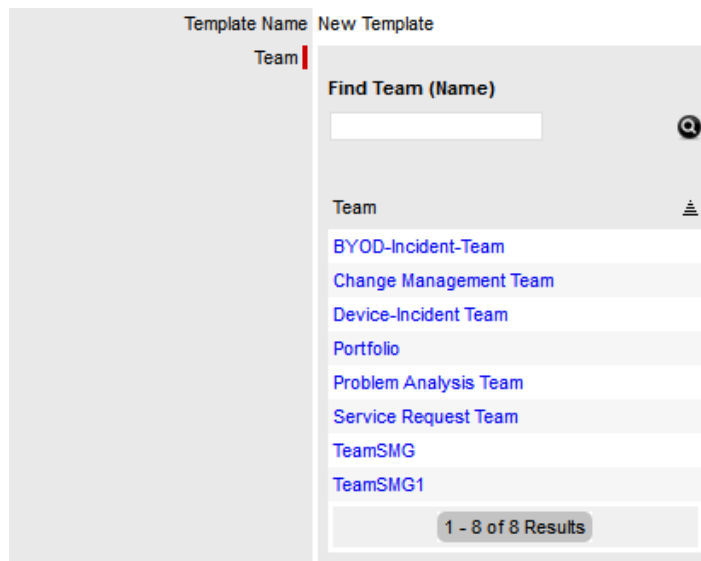
2. Click on the relevant Template Name hyperlink

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 are labels for 'Roles', 'Default Portal', 'Assignment Template', and 'Operations Processes'. The 'Roles' section contains a grid of checkboxes: 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 including 'Developer' (highlighted) and 'Service Desk Tech'. To the right of the 'Operations Processes' label, there is a checkbox for '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', which has opened a list of templates: 'New Template' and 'R&D Template'. The 'Ingo Engels' name is visible in the top right. '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 is a table with one row. The table has columns for 'Team Name', 'Layer', and 'Portfolio'. The 'Layer' column contains the text 'Management'. A '1 - 1 of 1 Results' indicator is shown below the table. 'Cancel' and 'Save' buttons are at the bottom right.

## 2.9 Knowledge

- ♦ Section 2.9.1, “Knowledge Management,” on page 800
- ♦ Section 2.9.2, “Articles, FAQs and Solutions,” on page 801
- ♦ Section 2.9.3, “Knowledge Base List, Search and Filter,” on page 808
- ♦ Section 2.9.4, “Content Approval Process,” on page 814
- ♦ Section 2.9.5, “Frequently Asked Questions (FAQs),” on page 829
- ♦ Section 2.9.6, “Article Groups,” on page 833
- ♦ Section 2.9.7, “Forums,” on page 838
- ♦ Section 2.9.8, “Surveys,” on page 845
- ♦ Section 2.9.9, “Surveying Customer Sentiment,” on page 854

## 2.9.1 Knowledge Management

Knowledge Management 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 privilege to create, edit, delete and publish Articles is defined for Users within the User Information screen
- ◆ For information regarding the Knowledge Base details page, see [“Knowledge Base List, Search and Filter” on page 808](#):
- ◆ For information regarding the Search and Filters of the Knowledge Base, see [“Knowledge Base List, Search and Filter” on page 808](#)
- ◆ For information regarding the implementation of the Knowledge Base content approval process, see [“Content Approval Process” on page 814](#)

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 fall-back 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 Articles, FAQs and Solutions


The Knowledge Base consists of Articles submitted by Users with Knowledge creation and publication rights. It is also the repository for Solutions, Backout Procedures, Workarounds and general information. Customers and Users can search Articles to find resolutions to common issues in order to handle the support load efficiently.

Following are some of the important sections in this page:

- ◆ [“Creating an Article or FAQ” on page 801](#)
- ◆ [“Viewing Knowledge Base Details” on page 802](#)
- ◆ [“Editing Knowledge Base” on page 803](#)
- ◆ [“Deleting Knowledge Base” on page 803](#)
- ◆ [“Direct Link” on page 804](#)
- ◆ [“Article Statistics” on page 804](#)
- ◆ [“Related Knowledge Base” on page 804](#)
- ◆ [“Article Attachments” on page 805](#)
- ◆ [“Article History” on page 805](#)
- ◆ [“Publishing an Article” on page 806](#)
- ◆ [“Automated Article Review Process” on page 806](#)
- ◆ [“Comments” on page 807](#)

### Creating an Article or FAQ

To create an Article or FAQ:

1. Click the  icon at the bottom of the page.
2. On the left-hand side, in the TYPE field, select the Article Type - Article or FAQ
3. Select the degree of public visibility from the Visibility drop-down menu

| Visibility Options | Description  |
|--------------------|--|
| Users              | Accessible to internal Users only (i.e., not to Customers).          |
| Users & Customers  | Visible to internal Users and Customers logged into the application. |
| Everyone           | Available publicly, without logging into the system.                 |

4. Select the Status of the Article from the drop-down menu options, as follows:

| Status              | Description   |
|---------------------|---|
| In Development      | <p>The Article is under development and is not accessible via a Knowledge Base search.</p> <p><b>**If the Control KBA via Request option is enabled this is the only State displayed when an Article is first created.</b></p>  |
| Pending Publication | <p>The Article has moved from development but requires approval before it is accessible via a Knowledge Base search.</p> <p><b>**If the Control KBA via Request is enabled in the application Setup and content is moved to a Pending Publication status, a Request is automatically generated that will require approval for the content to be accessible in the KB.</b></p> |
| Published           | <p>The Article has been approved and is included in a Knowledge Base search.</p>  |
| Archived            | <p>The Article is no longer accessible in the Knowledge Base. Users can search on Archived content and return to a Published state, if required.</p>  |

5. Select an Item Category

The Item Type search box and Classification list is displayed.

6. Assign the Classification for the Article from the drop-down options.

7. Set the Review Date

This option is displayed if Review KBA is enabled within Admin>Setup>Privileges>System. If the Review Date field is left blank, it will be auto-completed based on the system Setup. To remind Users to review article content, an alert and email will be sent to the author of the Article based on the number of days set for the Review KBA Alert in the system Setup. If the User is no longer active in the system, the reminder will be sent to the Supervisor of the User.

8. Search and select at least one Item Type or Item

An item type must have an item associated with it for there to be visibility for the knowledge base articles created within Service Desk.

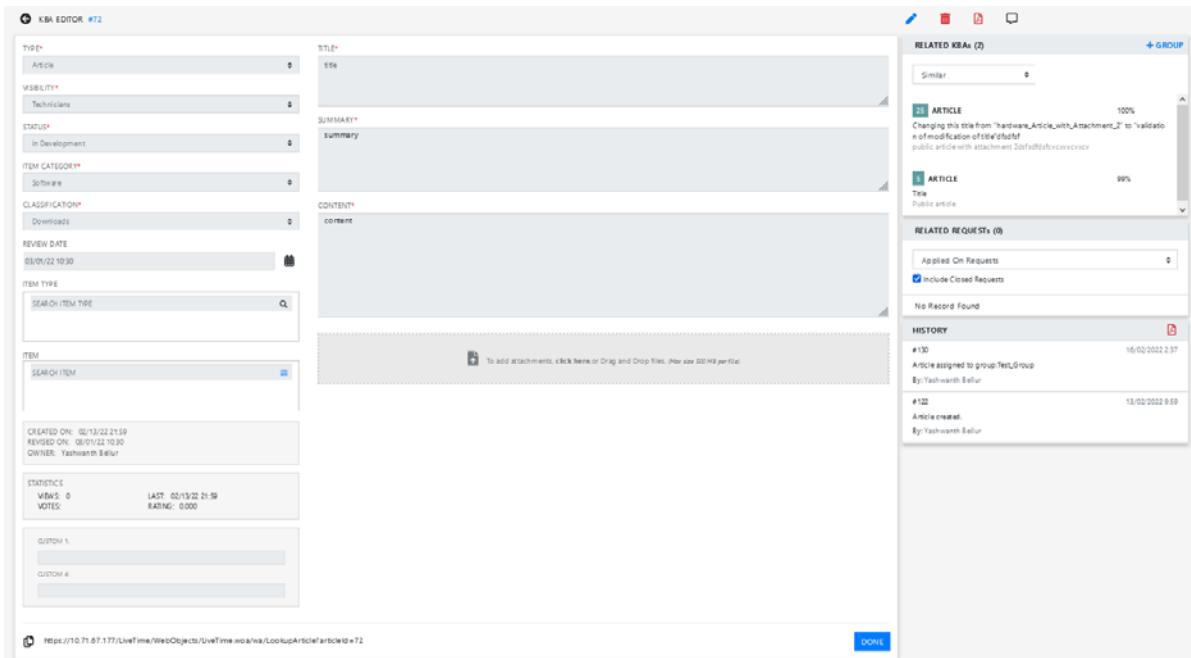
9. Enter a Title, Summary and Content for the Article or FAQ

If required, you can add an attachment.


10. Click Create.

## Viewing Knowledge Base Details

To View the Knowledge Base details, click the required KB ID. The following details are displayed in the Knowledge Base details page:



### Editing Knowledge Base

To edit a Knowledge Base, click the  icon.

User who has created the article, or users with Edit privilege can modify the content of an Article.

When the Control KBA via Request option is enabled and published KBA content is edited, a request for approval will automatically be generated when the edited content is saved. However, until the request is approved, the Article retains its published state and displays the pre-edited content.


---

**NOTE:** Users are designated editing rights within the User Information screen.

---

### Deleting Knowledge Base

Users that have the Delete privilege can delete a published Article by clicking its number in the

Articles list and Clicking the  button.

When the Control KBA via Request option is enabled and a published KBA is marked for deletion, a request for approval is automatically generated. However, until the request is approved, the Article remains accessible in the Knowledge Base.

---

**NOTE:** Users are designated deleting rights within the User Information screen.

---

## Direct Link

A Direct Link field is displayed when an Article is published and has the visibility defined for Technicians & Customers or Everybody. This link can be sent to system Users as a means of providing instant access to the Article.

## Article Statistics

For each Article, the Statistics field shows:

- ◆ when an Article was created
- ◆ when an Article was last reviewed
- ◆ the number of times it has been viewed
- ◆ the date an Article was last viewed
- ◆ an average rating score.

|            |                      |
|------------|----------------------|
| STATISTICS |                      |
| VIEWS: 0   | LAST: 02/24/22 02:26 |
| VOTES:     | RATING: 0.000        |

## Related Knowledge Base

The Related KBAs lists Similar Articles/FAQs and the percentage of relevant text contained in the Article. To view the content of KBAs, click the ID.

In this panel, you can group the current KBA with other KBAs. To group, click +GROUP, and then add the current KBA to a new group or an existing group.



**GROUP KNOWLEDGE BASE** ✕

Add current Kba to a

New Group  Existing Group

NAME\*

---

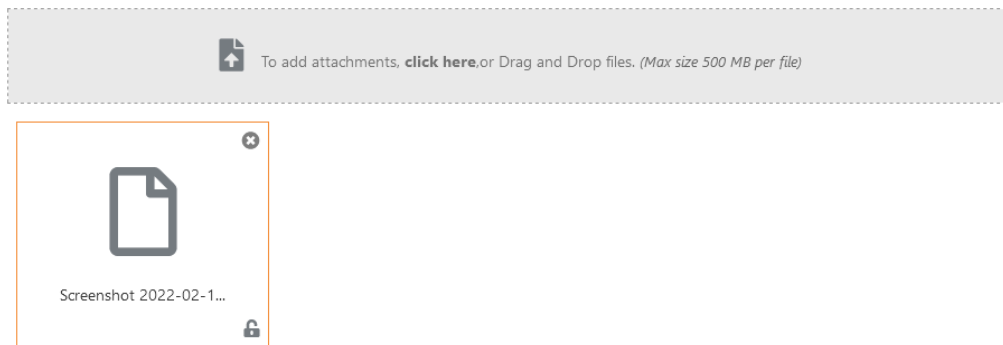
DESCRIPTION\*

---

CANCEL
CREATE

## Article Attachments

Files can be attached to the Article either by dragging and dropping the required file, or by clicking inside the Attachments panel.



To delete an attachment, click the remove button.

## Article History

To view the historical changes of a Knowledge Base Article, select the History tab inside the Article editor. The History is an audit trail of the Article, recording all activities from creation to publication of the Article. If changes are made to the Article a historical entry is recorded, and displayed with a Rollback option. This option allows the Article to be returned to a previous state, if the change is not required or permitted.

| HISTORY  |                 |
|---|-----------------|
| #132  | 16/02/2022 2:37 |
| Article assigned to group:Test_Group  |                 |
| By: Yashwanth Bellur  |                 |
| #120  | 13/02/2022 9:25 |
| Article created from Incident #: 100130   |                 |
| By: Yashwanth Bellur  |                 |

You have an option to export the article history into a PDF file. To export the data, click the PDF icon.

## Publishing an Article

By setting the status of a newly created Article to In Development the Article can be held in the author's Development list until it is ready to be submitted for approval.

When it is ready for approval, the author can move the Article status to Pending Publication. Articles with a status of Pending are accessible in the Pending Articles filter of the Knowledge Base.

Articles are made available for reference in the Knowledge Base when they are assigned a Published status.

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 requires approval by Users with publishing privileges before the content is accessible in the Knowledge Base. (See: [KBA Content Approval](#))

---

**NOTE:** Users are designated publishing rights within the User Information screen.

---

## Automated Article Review Process

When the Review KBA is enabled within Admin>Setup>Privileges>System each new KBA is created with a review date. If the Review Date field is left blank at the point of creation, it is auto-completed based on the system Setup. Article authors are sent an alert and email reminding them to review content when the reminder Alert date is triggered.

To review an Article, within the Knowledge Tab:

1. Open the relevant Article
2. Click Edit
3. Update content in the relevant fields
4. Click Review

**Article Editor**

Detail

**Flags**

Type Article

Visibility Technicians & Custom

Status Published

Item Category Service

Classification Question

Review Date 06/15/11

Review


Next Review Date

5. Complete the Next Review Date field, or leave blank for the system to auto-populate the field based on system settings
6. Click Save
7. Click Done.

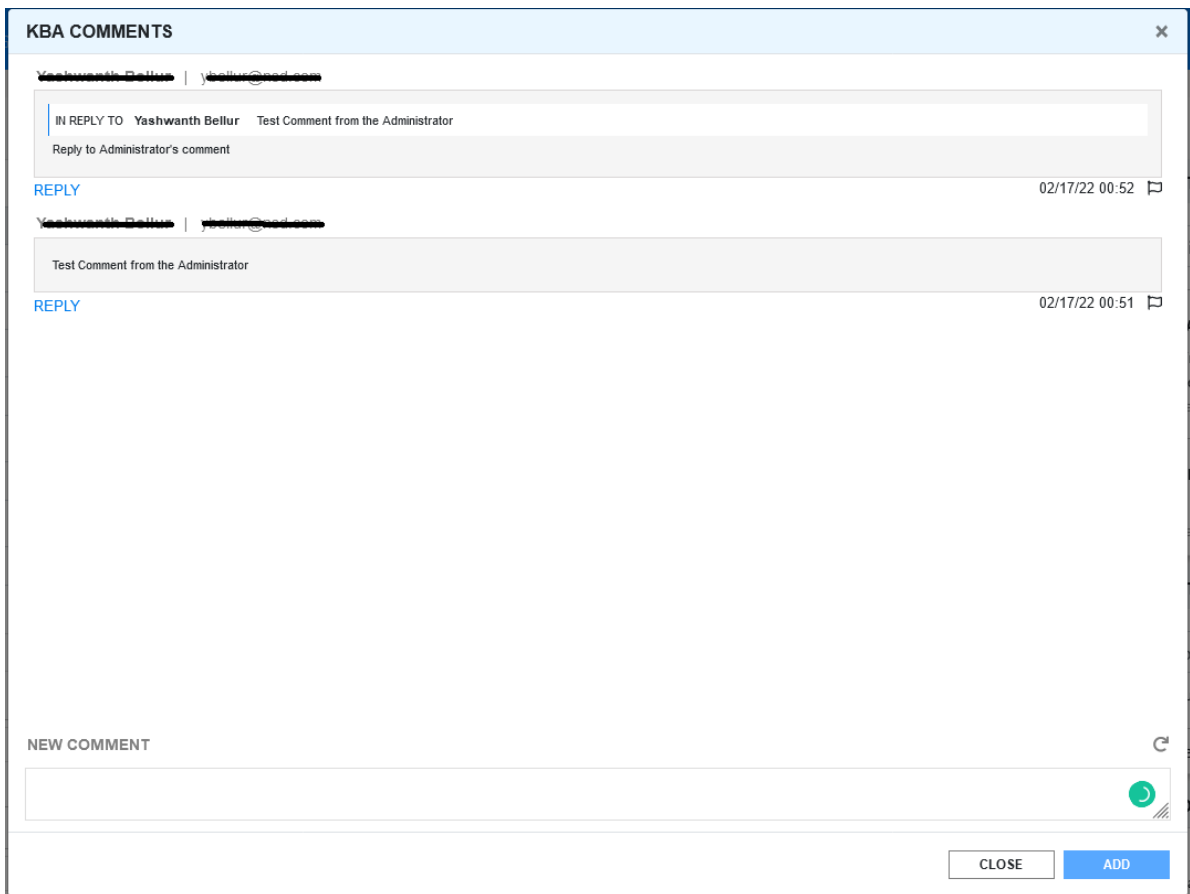
When the Control KBA via Request option is enabled in the Setup>Privileges>Request tab, Knowledge Base content with a Pending Publication status automatically generates a request that requires approval by Users with publishing privileges before the content is accessible in the Knowledge Base. (See: [KBA Content Approval](#))

## Comments

To enable comments section, Go to Setup, click Setup > privileges > System > Enable KBA Comments.

To add a comment in the Knowledge Base, open the knowledge base, click the  icon.

In the comments pop-up, specify the required comment in the New Comment text box, and then click Add.



You can also reply to the previous comments. You can also mark the comment as inappropriate (irrelevant) by clicking on the flag icon beside the comment. Only owner of the KBA can mark the comment as inappropriate.

### 2.9.3 Knowledge Base List, Search and Filter

In this page, we explain the listing, searching and filtering of knowledge base.

Following are some of the important links in this page:

#### Knowledge Base List

The Knowledge Base page lists all the knowledge base in various tabs . The following table explains the various tabs in this page:

| Filter View | Description   |
|-------------|---|
| All         | This tab displays all Knowledge Base, which includes Articles, FAQs and Solutions.                |
| Article     | Displays all the articles in the system. Article is a reference document for general information. |
| FAQs        | Lists all FAQs, regardless of publication status.   |

| Filter View | Description  |
|-------------|--|
| Solutions   | <p>Displays all the solutions that were 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.</p> <p>The solution tab also displays the Workaround and Backout procedures.</p> <p>Workarounds are created within an Incident or Problem, to provide a possible workaround for a specific request.</p> <p>Backout Procedures are created within Change Request as a fallback plan for withdrawing a change procedure.</p> |

### Knowledge Base Action


The following are the actions that can be performed in the Knowledge Base list page:

| Filter View | Description |
|-------------|-------------|
|-------------|-------------|

Managing Columns

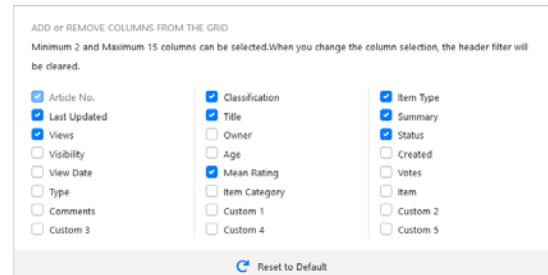
The columns displayed in the Knowledge Base page can be rearranged, reordered and resized.

- ◆ To Rearrange the columns, drag and drop the column to the required position.
- ◆ To reorder the columns, click the column header.
- ◆ To resize the column width, position the cursor and hover over the column line so the cross becomes a double arrow, click, hold, and drag the mouse to increase or decrease the column width.

- ◆ To add or remove columns, click the  icon, and then select the required field that should be displayed.

Ensure that a minimum of 2 and maximum 15 columns can be selected.

If you are adding or removing any columns, then the header filter will be cleared.



Row Actions

Each row in the Knowledge Base has its own set of actions. To view the actions, Click the kebab menu icon (vertical three dots). Following are some of the actions displayed:

- ◆ Archive
- ◆ In Development
- ◆ Pending Publication
- ◆ Publish
- ◆ Reset Rating
- ◆ Delete
- ◆ Export

---

## Filter View

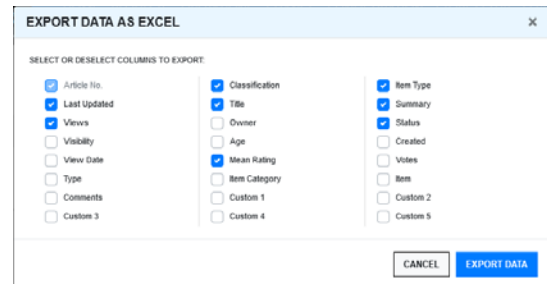
## Description

---

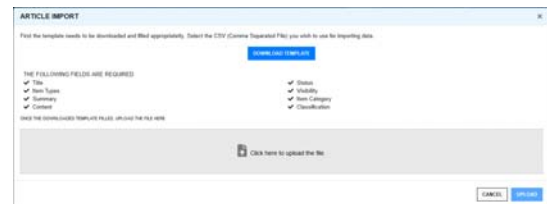
### Import or Export Data

Import or Export actions have different set of actions.

- ◆ To export the list, click the icon, and then in the pop-up, select the required columns that should be exported to an Excel sheet.



- ◆ To import the data, you need to follow the template. Click the icon and download the template. In the template, update the required information and then upload the file. After uploading the file, you need to map the columns in the excel sheet with the corresponding fields.



### Bulk Operations

Following are some of the bulk operations that can be performed on Knowledge Base. Select one or more than one Knowledge Base, and then perform any of the following action:

- ◆ **Group:** Select more than one KBs and click the icon to group. Ensure that the selected Knowledge Base is not part of other groups.
- ◆ **Delete:** Select the required KBs and then click the icon.
- ◆ To change the status of the KB, then select the required KB, click the icon, and then click the required option. The available options are Archive, In Development, Pending Publication and Publish.

## Knowledge Base Search and Filter

To search and filter the Knowledge Base, refer to the following sections:

- ◆ “Full Text Search” on page 812
- ◆ “Column Header Level Search” on page 812
- ◆ “Knowledge Base Filter” on page 812

### Full Text Search

To search the Knowledge Base, specify the required keyword and hit enter. If you had applied any filter or performed any header level search, then the results will be cleared. If you want to retain the existing applied filter criteria and want to search within the filtered results then ensure that you select the Search within Filtered Results check-box.

For more information, see [Full Text Search Options](#).

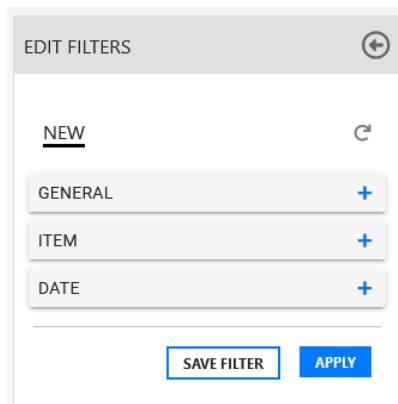
### Column Header Level Search

Use the column header level search to search the data within the column to narrow down the result. This option is available for many columns.



### Knowledge Base Filter

On the left-hand side of the Request page, the Filters panel is displayed. Using the options available in this panel, you can filter the unrelated data so that only the required data is displayed in the grid.



#### **General Filters**

This section of the filter includes the following options:

- ◆ My Content: Select this check-box if you want to filter only the content that you (logged-in user) had created
- ◆ Article Number: In this field, specify the KBA number.



- ◆ Article Type: In this field, select the type of the KBA. The available options are Article, FAQs, Solution and Workaround.
- ◆ Owner: In this field, specify the name of the KBA owner.
- ◆ Status: In this field, select the status of the KBA.
- ◆ Visibility: In this field, select the visibility of the KBA.

**ITEM Filter**


- ◆ Item Category: In this field, select the category to which the KBA belongs.
- ◆ Item Type/Item Number: In this field, specify the item number.

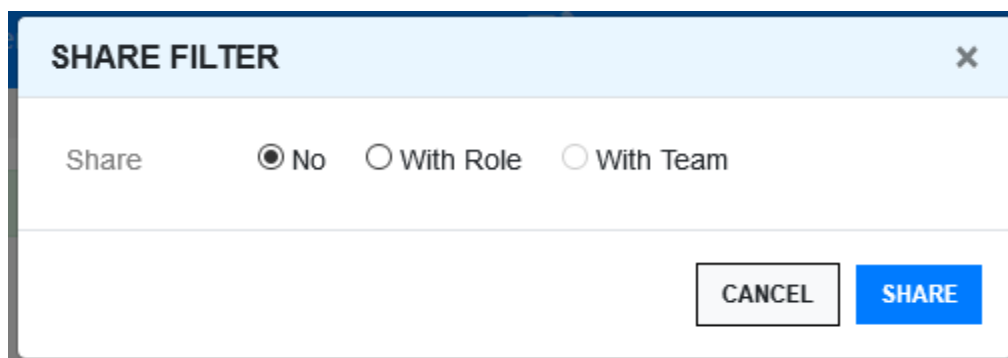
**Date**

- ◆ Created Date: In this field, select a date range when the KBA was created.
- ◆ Last Updated: In this field, select a date range when the KBA was last updated.
- ◆ Last Review: In this field, select a date range when the KBA was last reviewed.
- ◆ View Date: In this field, select a date range when the KBA was last viewed.

**Additional Actions**

Following are some of the actions that can be performed in this Filters panel:

- ◆ Apply Filters: After making the required modifications to the filter panel, click Apply to view the results.
- ◆ Reset Filter: To reset the data displayed in the grid and clear the filter fields, click the  icon.
- ◆ Save Filter: After modifying the filters, if required, you can save the filter for future use. To save the filter, click the Save Filter button.
- ◆ Load Saved Filters: To load or apply the saved filters, click the filter list panel, and then select the required filter.
- ◆ Share Filter: To share the filter, click the share icon, and then select the required option in the displayed pop-up.



The available options are:

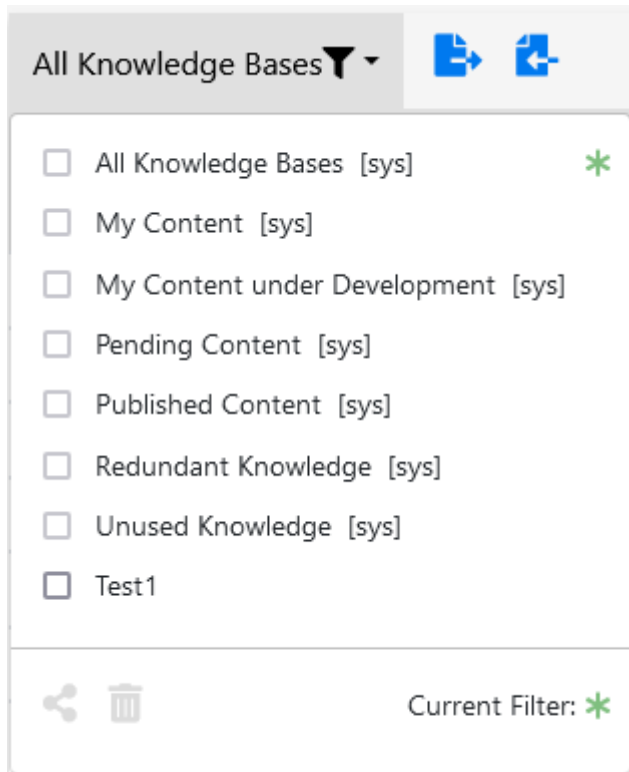
- ◆ No: Select this option to stop sharing the filters that was shared earlier.
- ◆ With Role: Select this option to share the filter with those who have same roles.
- ◆ With Team: Select this option to share the filter with your team.

- ♦ Delete Filter: Click the Delete button to delete the filter.

---

**NOTE:** Only the custom filters can be shared and deleted.

---



## 2.9.4 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

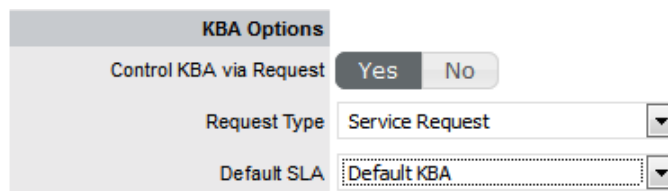
To enable the approval process, as an Administrator:

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 set to "Yes".
- 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.

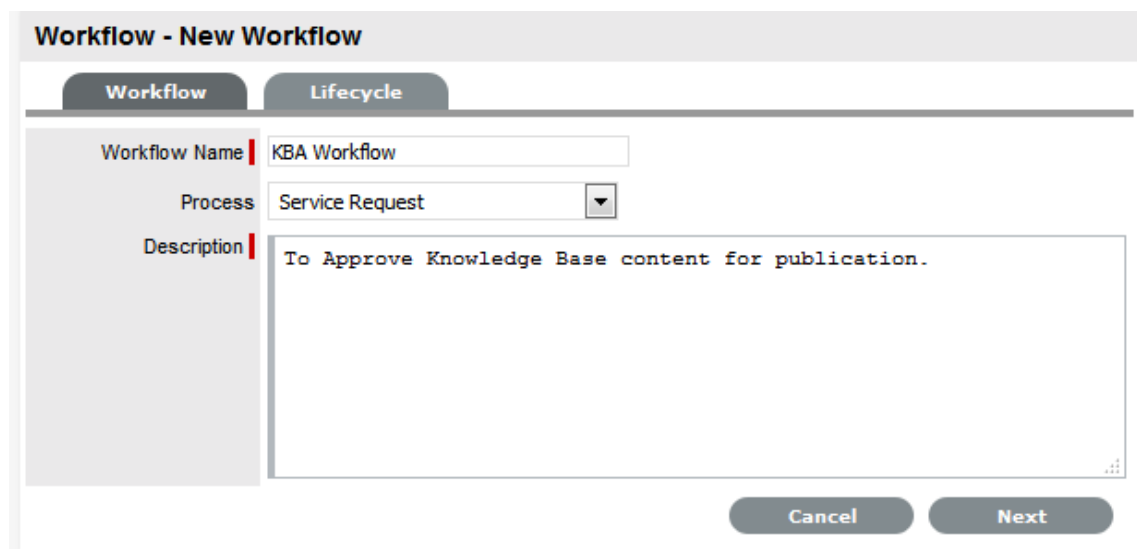
---

## 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". The form contains the following fields:

- Workflow Name:** A text input field containing "KBA Workflow".
- Process:** A dropdown menu with "Service Request" selected.
- Description:** A text area containing "To Approve Knowledge Base content for publication."

At the bottom right of the form, there 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

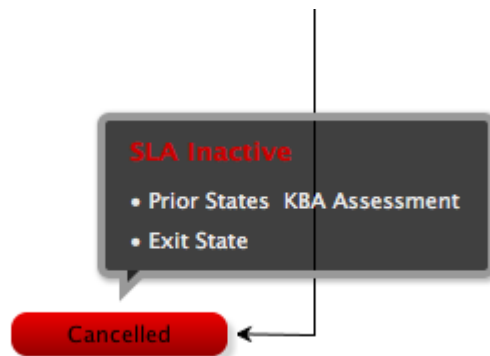
When a Request moves into the Pending Publication State three buttons will be displayed in the Request Summary tab Next Action Field:

| 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.)<br><br>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.<br><br>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 Sate 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

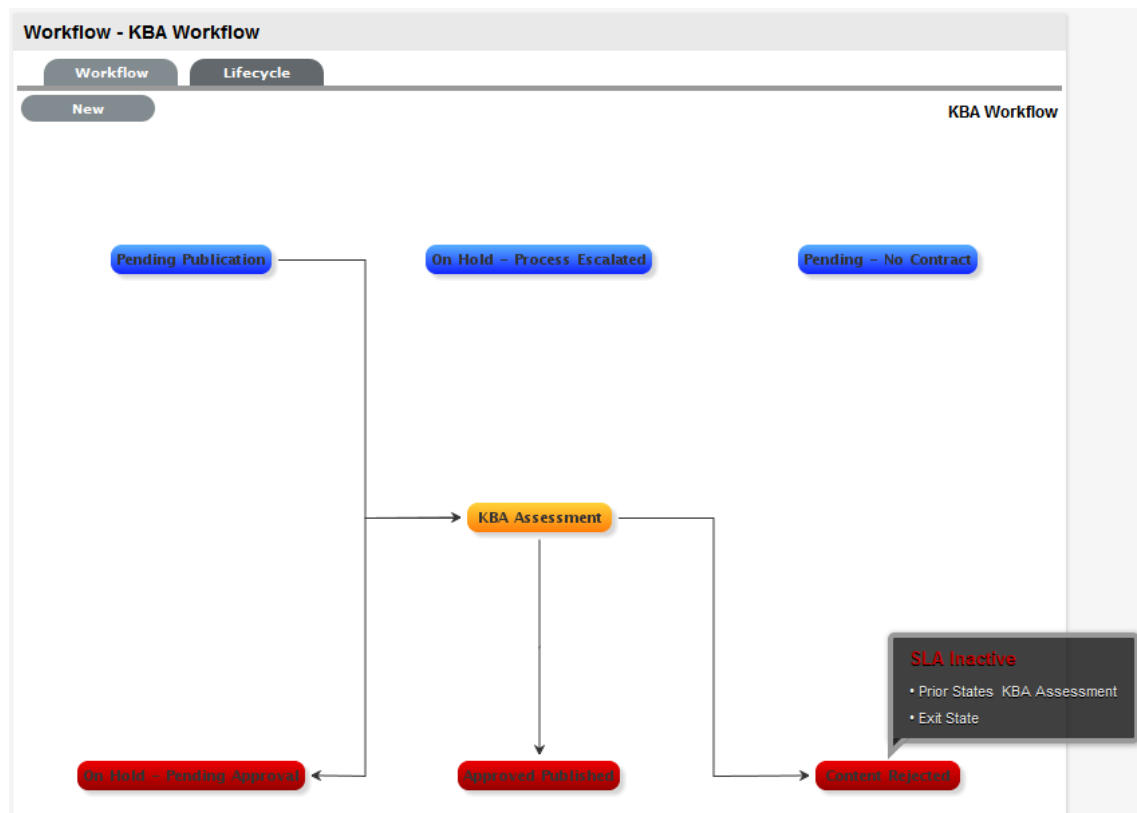
Selected states

- 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.

**Workflow - KBA Approval Workflow**

**Workflow** | **Lifecycle**

**Duplicate**

Workflow Name | KBA Approval Workflow

Process | Service Request

Default Open Status | Pending Publication

Default Closed Status | Cancelled - Unpaid

Note Action |   
 Cancelled - Unpaid  
 Approved Published  
 Content Rejected  
 Default KBA

SLA |   
 Find SLA (Name)  
  
 X Q  
 SLA  
 Warranty  
 Silver  
 SLA  
 Platinum  
 Default KBA  
 1 - 5 of 5 Results

Description | To Approve Knowledge Base content for publication.

**Cancel** **Save**

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.

**Team Information**

Information Service Group States Layers

**Agreements**

OLAs

Available OLAs

New OLA  
New OLA1

Selected OLAs

None selected

**Workflows**

Workflows

Available Workflows

Change Deployment Workflow  
Emergency Change Workflow  
Standard Change Workflow  
Typical Change Workflow

Selected Workflows

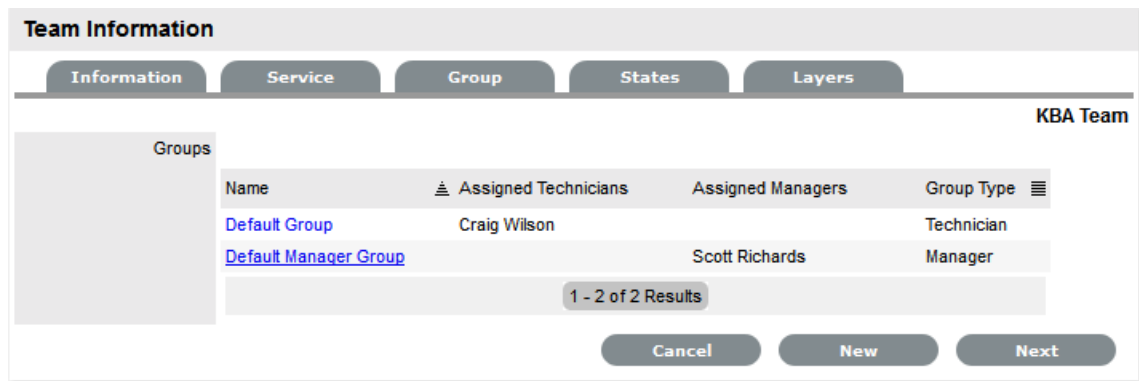
KBA Approval Workflow

Default Workflow

KBA Approval Workflow

Cancel Next

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 requires approval by Users with publishing privileges, before the content is accessible in the Knowledge Base.

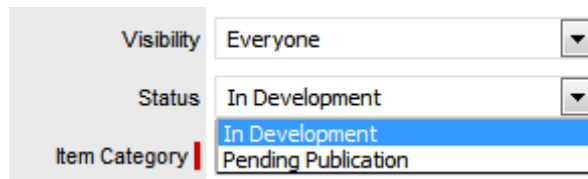
When the User has completed the content and the Article is ready for publication and moved to the Article Status of Pending Publication, a Request is automatically created. When the KBA is assigned the Pending Publication state, the content of the Article can no longer be edited.

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.

### Creating KBA Approval Requests

New KB content is initially saved with a status of In Development. When this content is ready to be published and if the Control KBA via Request is enabled, the following steps should be followed:

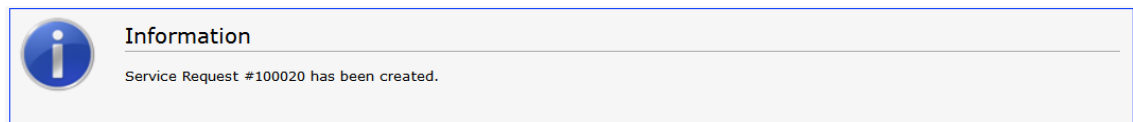
1. Go to the Knowledge > Articles tab
2. Select the Article No. link
3. Click Edit
4. Move the Status to Pending Publication



The screenshot shows a dropdown menu for the 'Status' field. The 'Status' label is on the left, and the dropdown is on the right. The current status is 'In Development'. The dropdown menu is open, showing two options: 'In Development' (highlighted in blue) and 'Pending Publication'.

5. Click Save

The Request Number that was generated is displayed and the KBA moves can no longer be edited.



6. Click Done.

### Managing KBA Approval Requests

KBA Approval Requests are found within the Request or Change tab, as defined in the Control KBA via Request customization. To approve new content within the relevant tab:

1. Select the Request # hyperlink

**Service Request Information**

Customer Contract Analysis Summary Notes Attachments Impact Audit Trail

Add Note Add Attachment Duplicate Print Alerts

Service Request # 100090

**Details**

Title

Customer Jeff Lag

Item Number Service Desk

Type Service Desk

Classification Question

Urgency Moderate

Impact Moderate

Priority Medium

**Assignments**

Escalation On Off

Escalation Layer Layer 1

Technician Vaibhav Jain

**Notification**

Customer Email Customer

Customer CCs

Technician Email Team

Technician CCs

**Service Request**

Team KBA Approval Team

Workflow KBA Approval workflow

Status Pending Publication

Next Action Pending Publication

**Pending KBA**

View KBA #140

Subject KBA Approval Article

Description Article has been updated and needs to be published

Delete Cancel Save

2. Click Edit
3. Select the View KBA link  
The contents of the KBA is displayed.
4. Click Done  
The screen returns to the Summary tab.
5. Move the Request to the Approval State

**Service Request**

Team KBA Approval Team

Workflow KBA Approval workflow

Status Pending Publication




Next Action KBA Assessment  
Pending Publication

6. Click Save
7. Click Edit  
The Accept, Revise and Reject buttons are displayed.

**Pending KBA**

View KBA #2

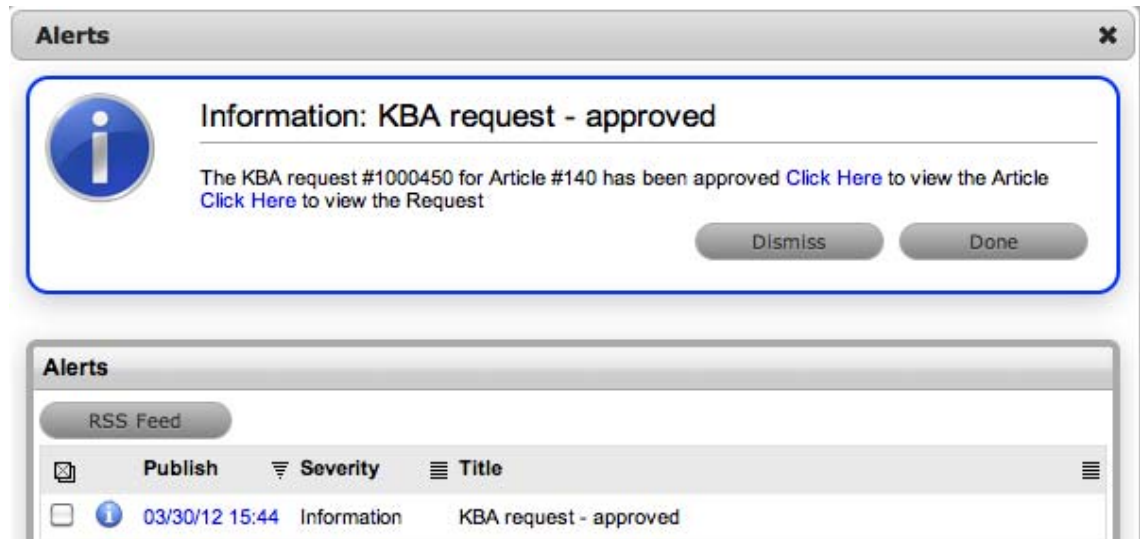
Operations    Revise

| Status  | Description   |
|---|---|
|  | <p>When selected the new content is approved for publication and the Request is moved to the Accept State.</p> <p>An Alert is sent to the KBA author informing them of the successful publication.</p>  |
|  | <p>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 Revise" State. The KBA is returned to the "In Development" State.</p> <p>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.</p> |
|  | <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.</p> <p>The KBA author is sent an Alert, notifying them that the content has been rejected.</p>                |

8. Select the appropriate Operations button  
A warning message is displayed, select OK. The system will move the Request to the appropriate State defined in the Workflow.
9. Add Note Content, if relevant  
Select Add Note button to save Note Content.
10. Click Done.



An alert is sent to the author of the KBA Article, notifying them if their KBA has been approved, rejected or requires revision. The Alert includes links to the related Article and Request.



---

**NOTE:** If a KBA Approval Request is deleted, the associated content reverts to the In Development status and the relationship between the Request and KBA is removed.

If a KBA is deleted when the associated Request is in the On Hold - KBA Rework system state, the Request moves to the Default Closed State for the assigned Workflow and the relationship between the two elements is deleted.

---

## 2.9.5 Frequently Asked Questions (FAQs)

Frequently Asked Questions (FAQs) are created by Users for Customers' reference in the Customer Portal.

---

**NOTE:** The privilege to create, edit, delete and publish FAQs is defined for Users within the User Information screen.

---

### Creating FAQs

To create an FAQ:

1. Select Knowledge>Articles
2. Click New

The screenshot shows the 'FAQ Editor' interface. At the top, there is a 'Detail' tab. Below it, a 'Flags' section is expanded, showing three dropdown menus: 'Type' set to 'FAQ', 'Visibility' set to 'Technicians & Customers', and 'Status' set to 'In Development'.

3. From the Type drop-down list, select FAQ
4. In the FAQ Editor, select a Visibility level  
Selecting Everyone will enable the FAQ to be viewed through the Public Access Knowledge Base.
5. Select a Status
6. Select an Item Category  
The Item Types and Classification fields appear.
7. Search and select an Item Type
8. Select a Classification
9. Set Review Date  
This option is displayed if Review KBA is enabled within Admin>Setup>Privileges>System. If the Review Date field is left blank, it will be auto-completed based on the system Setup. A content review reminder will also be sent to the author of the Article based on the number of days set for the Review KBA Alert in the system Setup. If the User is no longer active in the system, the reminder will be sent to the Supervisor of the User.
10. Enter the question

11. Enter the solution in the Answer field
12. Click Save.  
The FAQ will be listed on the Articles List.

## FAQ Statistics

For each FAQ, the Statistics field shows:

- ◆ when an FAQ was created
- ◆ when an FAQ was last reviewed
- ◆ the number of times it has been viewed
- ◆ the date an FAQ was last viewed
- ◆ an average rating score.

| STATISTICS |                      |
|------------|----------------------|
| VEWS: 0    | LAST: 02/24/22 02:26 |
| VOTES:     | RATING: 0.000        |

## Publishing an FAQ

By setting the status of a newly created FAQ to In Development the FAQ can be held in the author's Development list until it is ready to be submitted for approval.

When it is ready for approval, the author can move the FAQ status to Pending Publication. FAQs with a status of Pending are accessible in the Pending Articles filter of the Knowledge Base.

FAQs are made available for reference in the Knowledge Base when they are assigned a Published status.

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 requires approval by Users with publishing privileges before the content is accessible in the Knowledge Base. (See: [KBA Content Approval](#))

---

**NOTE:** Users are designated publishing rights within the User Information screen.

---

## Editing an FAQ

Users that have the Edit privilege can modify the content of an FAQ by clicking the number in the FAQ list, updating the content and selecting Save.

When the Control KBA via Request option is enabled and published KBA content is edited, a request for approval will automatically be generated when the edited content is saved. However, until the request is approved, the FAQ retains its published state and displays the pre-edited content.

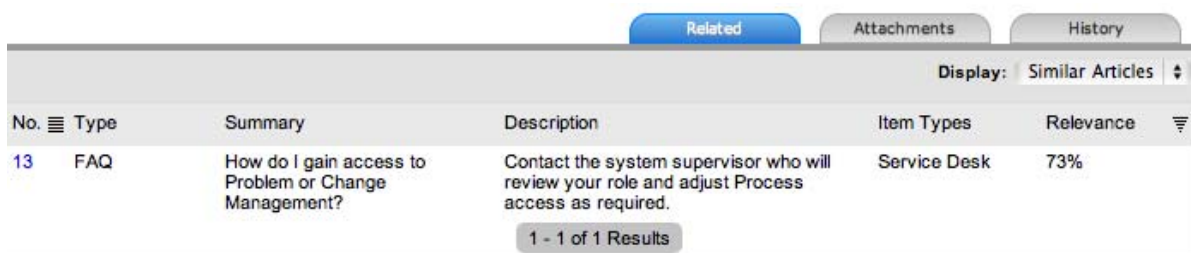
---

**NOTE:** Users are designated editing rights within the User Information screen.

---

## Related FAQs

The Related tab lists Similar FAQs and the percentage of relevant text contained in the FAQ. To view the content of an FAQ included in the Similar Articles screen of the Related tab, with the FAQ in Edit mode, select the FAQ No. link.



| No. | Type | Summary   | Description  | Item Types   | Relevance |
|-----|------|---|--|--------------|-----------|
| 13  | FAQ  | How do I gain access to Problem or Change Management? | Contact the system supervisor who will review your role and adjust Process access as required. | Service Desk | 73%       |

1 - 1 of 1 Results

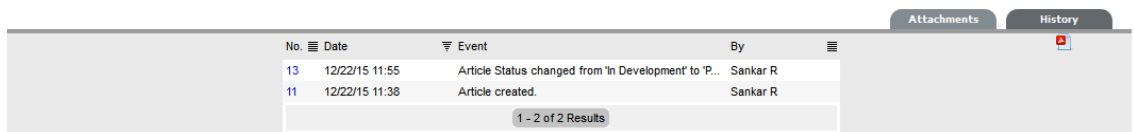
## FAQ History and Rollback Option

To view the historical changes of an FAQ, select the History tab inside the FAQ editor. The History is an audit trail of the FAQ, recording all activities from creation to publication of the FAQ. If changes are made to the FAQ, a historical entry is recorded and displayed with a Rollback option. This option allows the FAQ to be returned to a previous state, if the change is not required or permitted.

Rolling back an FAQ:

To rollback to a previous version of an FAQ:

1. Select Knowledge > Article
2. Click Edit
3. Select the FAQ number and its History tab
4. Select the history ID# hyperlink to view changes to the FAQ
5. Select the Rollback button to return the FAQ content to the previous state



The screenshot shows a table with columns for No., Date, Event, and By. The table contains two rows of data. The first row shows a status change from 'In Development' to 'Published' on 12/22/15 at 11:55 by Sankar R. The second row shows the article was created on 12/22/15 at 11:38 by Sankar R. There are 'Attachments' and 'History' tabs at the top right, and a '1 - 2 of 2 Results' indicator at the bottom.

| No. | Date           | Event   | By       |
|-----|----------------|---|----------|
| 13  | 12/22/15 11:55 | Article Status changed from 'In Development' to 'P... | Sankar R |
| 11  | 12/22/15 11:38 | Article created.                                      | Sankar R |

6. Click Save.

## Deleting an FAQ

Users who have the Delete privilege can delete a published FAQ by clicking its number in the FAQ list and selecting the Delete button.

When the Control KBA via Request option is enabled and a published KBA is marked for deletion, a request for approval is automatically generated. However, until the request is approved, the FAQ remains accessible in the Knowledge Base.

---

**NOTE:** Users are designated deleting rights within the User Information screen.

---

### 2.9.6 Article Groups

Related Articles that are linked and catalogued under one name are displayed within Article Groups. Article Groups are accessed in the Customer Portal when a Customer searches the Knowledge Base. These are presented as search results that contain a likely match to the search criteria, plus any related Articles.

Within the Portal, a list of Related Articles will appear when the Article is selected, if the Article is part of a Group. To view a related Article, the User needs to select the Article ID hyperlink.

## Office Updates

### Summary

Scheduled Updates

### Content

Office updates are scheduled to occur monthly. Register a request for an update to be included in a scheduled update.

### Related

| Article | Type    | Item Type | Classification | Content                    |
|---------|---------|-----------|----------------|----------------------------|
| 10      | Article | Office    | Installation   | Functionality and Features |

1 - 1 of 1 Results

|                        |                |                    |        |
|------------------------|----------------|--------------------|--------|
| <b>Article ID:</b>     | 9              | <b>Item Types:</b> | Office |
| <b>Type:</b>           | Article        |                    |        |
| <b>Classification:</b> | Installation   |                    |        |
| <b>Created:</b>        | 06/06/11 11:36 |                    |        |
| <b>Modified:</b>       | 06/06/11 11:38 |                    |        |

★ ★ ★ ★ ★ Rate

Technicians and Supervisors can also view related Articles if an Article Group exists. When an Article is selected, a Related tab is displayed. To move to a linked Article, select the ID number hyperlink.

Related Attachments History

Display  Similar Articles

| No. | Type    | Summary           | Description   | Item Types | Relevance |
|-----|---------|-------------------|---|------------|-----------|
| 9   | Article | Scheduled Updates | Office updates are scheduled to occur monthly. Register a request for an update to be included in a scheduled update. | Office     | 100%      |

1 - 1 of 1 Results

## Creating an Article Group

To create an Article Group:

1. Select Knowledge>Article Groups
2. Click New
3. Enter the Group Name
4. Enter a Group Description

**Group**

Group Detail Search Group Analysis

**New Group**

Name | Office Grouped Article

Description | Related Knowledge base for office products.

Cancel Save

5. Click Save

The Article search screen is displayed.

6. Use the search screen to find Articles to add to the Article Group

For specific Articles use the search criteria, or leave blank for the complete list of Articles to be displayed. See: [Knowledge Base Search](#).

**Group: Office Grouped Article**

Group Detail   Search   Group Analysis

**Basic**

All Text

Article No.

Last Review  ▼

Rating  ▼

Custom 1  Online  
-Hardware  
offline work  
-Router ▲ ▼

Custom 2

Custom 3

Custom 4

Custom 5

**Advanced**

Item Type/Item Number

Article Type  Article ▼

Title

Summary

Content

Attachment

**i** You may use a wide variety of search options to find the exact article you are looking for.

- To perform a single character wildcard search use the "?" symbol.
- To perform a multiple character wildcard search use the "\*" symbol.
- To do a fuzzy search use the tilde, "~", symbol at the end of a single word, so to find words similar to roam, enter "roam~". This will return terms like foam and roams.

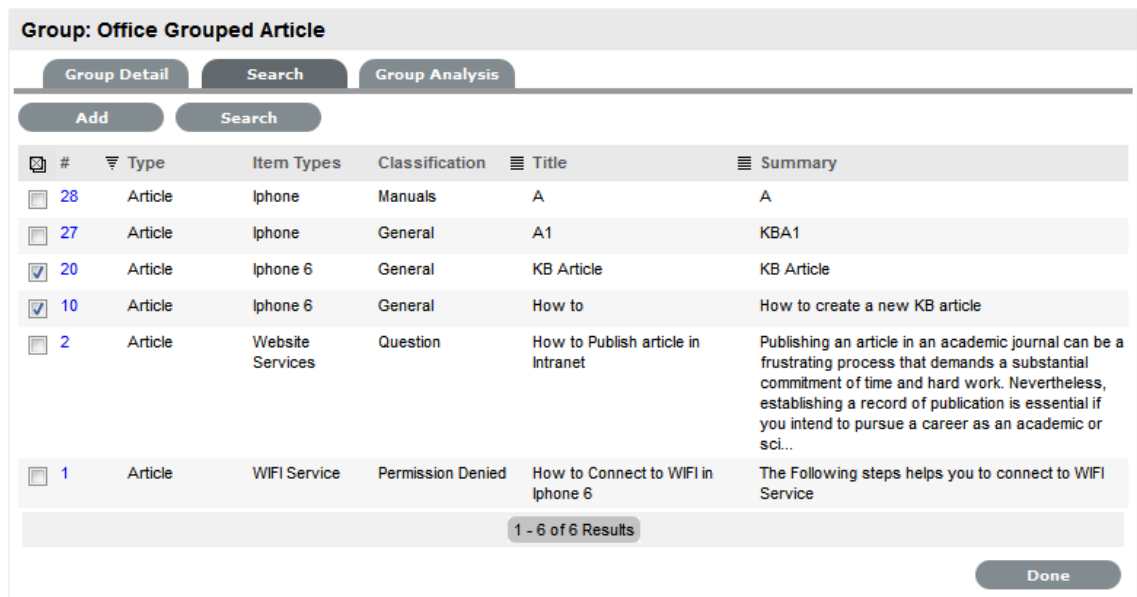
Clear   Search

7. Click Search

The search results list only includes Articles assigned the Published state.

8. Check the boxes of related Articles to be linked



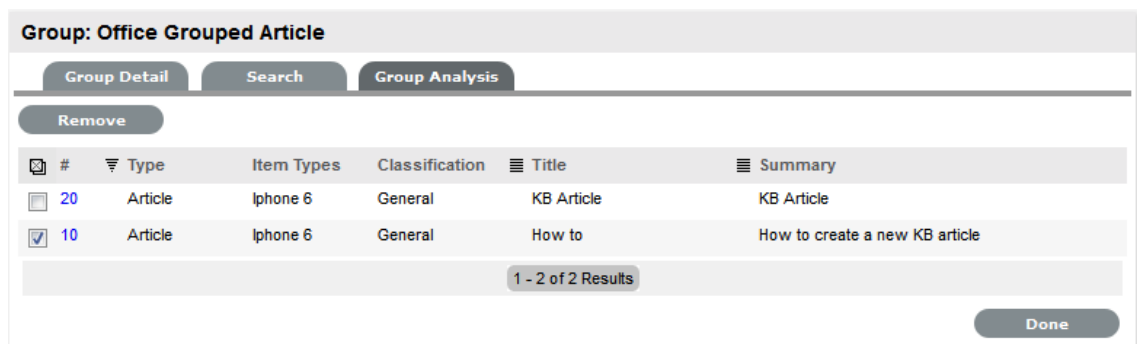


9. Click Add  
Continue to select and add Articles as required.
10. Move to the Group Analysis tab to view linked Articles
11. Click Done.

## Removing an Article

To remove an Article from a Group:

1. Select Knowledge > Article Groups
2. Select the Article Group name
3. Select the Group Analysis tab  
The Remove button is visible.
4. Check the box next to the Article that is to be removed from the Group



5. Click Remove
6. Click Done.













## 2.9.7 Forums



The Forums feature is a platform for informal discussions between Service Desk Users, and if enabled, between Users and Customers.

### Forum List Features

The Forum List displays a list of Forums that are currently active in the system. Within this screen the User has the ability to:

- ◆ Create new Forums
- ◆ Search Forums
- ◆ Edit Forums
- ◆ Move to bookmarked Forums.

| Forums   |        |           |   |
|--|--------|-----------|---|
| <a href="#">New</a> <a href="#">Search</a> <a href="#">Bookmarks</a>   |        |           |   |
| Forum  | Topics | Last Post | Visibility  |
|  <b>Change Management</b><br>Discussion on issues related to change management<br><i>Moderator: System User</i>               | 0      | No Post   | Users & Customers  |
|  <b>Configuration Management</b><br>Discussion on issues related to configuration management<br><i>Moderator: System User</i> | 0      | No Post   | Users & Customers  |
|  <b>General</b><br>General Discussion<br><i>Moderator: System User</i>  | 0      | No Post   | Users & Customers  |
|  <b>Incident Management</b><br>Discussion on issues related to incident management<br><i>Moderator: System User</i>           | 0      | No Post   | Users & Customers  |
|  <b>Problem Management</b><br>Discussion on issues related to problem management<br><i>Moderator: System User</i>             | 0      | No Post   | Users & Customers  |
|  <b>Service Level Management</b><br>Discussion on issues related to service level management<br><i>Moderator: System User</i> | 0      | No Post   | Users & Customers  |

| Forum Fields  | Description  |
|---|--|
| Forum   | Includes the Forum title, the Forum description and Moderator details.   |
| Topics  | The number of topics included in the Forum.  |
| Last Post   | Date of last posting.  |
| Visibility  | Defines the visibility set for this Forum, i.e., who can view it.  |
|  | Click the icon to Edit the Forum details or to Delete the Forum. This permission is only available to Users assigned the Moderator privilege.<br><br>Note: The General Forum can only be re-named and not deleted. |
|  | Click to display Forums that have been bookmarked.   |

## Creating a Forum Topic

A Forum can consist of an over-arching header with sub-categories or Topics.

To create a Forum:

1. Select Knowledge>Forums
2. Click New

3. Enter the Forum Name
4. Select the Forum Moderator from the drop-down list  
This list is generated from Users that have been assigned the Moderator privilege in their User Details form.
5. Define the Visibility:


| Visibility Options | Description  |
|--------------------|--|
| Users              | Viewable 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.                 |

6. Enter a Description for the Forum
7. Click Save
8. Click Done to return to the Forum list.

## Editing Forum Details

Users with Moderator privileges can edit Forum details and delete them.

To edit a Forum:

1. Select Knowledge>Forums
2. Click  to open the Forum

The Forum Editor screen is displayed.

3. Click Edit

Fields within the screen move into Edit mode.

**Forum Editor**

**Details**

Forum Name | Change Management

Moderator | Simon Supervisor

Visibility | Users & Customers

**Description**

Format | Font Family | Font Size | HTML

**A** | **B** | *I* | U | ABC | | | | | | | | **x<sub>2</sub>** | **x<sup>2</sup>**

Path: p | Words: 7

Delete | Cancel | Save

4. Enter the required changes

Or, select Delete to discard the Forum.

5. Select Save

The updated information is saved.

## Joining a Forum

Users can participate in a Forum by adding sub-categories for discussion called Forum Topics. Or, they can reply to an existing Topic by adding Posts.

To participate in a Forum:

1. Select Knowledge>Forums
2. Click on the Forum name link

The Topic Title screen is displayed.


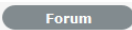




**Problem Management**

New | Forum

| Topic  | Status | Replies | Views | Author         | Last Post                        |
|--|--------|---------|-------|----------------|----------------------------------|
| <a href="#">RSS Knowledge</a><br>Information on RSS              | Active | 0       | 0     | Jason Blackett | No Posts                         |
| <a href="#">Problem KB</a><br>How to resolve the problem with KB | Active | 1       | 1     | Jason Blackett | Jason Blackett<br>01/19/16 06:35 |

1 - 2 of 2 Results

Inside a Forum the following Topic options are available:

| Topic Title Buttons  | Description   |
|--|---|
|       | Allows User to add a Forum sub-category called a Topic.                           |
|       | Allows the User to return to the Forum list.                                      |
|       | Indicates that the Topic has posts that are no older than 2 days.                 |
|       | Indicates that the Topic has posts that are no older than one week old.           |
|       | Indicates that the Topic has no posts or that the posts are older than one month. |
|  Edit | Allows the User to edit Topic details.  |
| Filters  | Description   |
| Active Topics  | Only displays all the Active Topics.  |
| All Topics   | Displays all Topics within the Forum, including Cancelled and Moved Topics.       |
| Cancelled Topics   | Displays only the Cancelled Topics.   |
| Moved Topics   | Displays the Topics that have been moved to another Forum.                        |

3. Click on a Topic Title to view the thread





The following buttons are available:

**Problem Management > Problem KB**

[New](#) [Topics](#) [Bookmark](#)


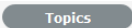
**Jason Blackett**  
01/19/16 11:03









How to resolve the problem with KB

**Jason Blackett**      
01/19/16 11:03

To resolve the problem with KB, Contact Administrator. Administrators should navigate to Knowledge Base and select the problem KB and update the KB article.

1 - 1 of 1 Results

| Topic Screen Buttons  | Description   |
|---|---|
|  | Allows the User to reply to the topic by adding a new post. Enter reply and Save. |
|  | Returns User to the Forum's Topic Title listing.                                  |

| Topic Screen Buttons   | Description   |
|--|---|
|   | Lists the forum on the Forum Bookmarks page. Click Bookmark and the Forum is automatically recorded within the Forum>Bookmarks screen. If a forum has been bookmarked, the Bookmark button is not available.  |
|  Show  | When selected the option  displays post content to User. When  is selected the post content is collapsed and no longer visible on the screen. |
|  Move   | Allows the User to move the current topic to another Forum.<br><br>When selected the option to move just the current post or all trailing posts is displayed. Select the appropriate option, select the new Forum Category, enter a reason for the relocation and select Move.                                  |
|  Delete   | Allows the User to delete the Topic title. This option is only available to Users with Forum Moderator permissions, which is configured within the User Information screen.<br><br>When selected, the system prompts for the User to enter a reason for erasing the topic before selecting Delete.              |
|  Edit   | Allows User to modify a post to the Forum. When selected, the Comments field is opened in edit mode, which allows the User to make amendments before clicking Update.   |

## Forum Search

To search the Forums:

1. Go to Knowledge>Forums
2. Click Search

The Forum Search screen is displayed.

**Forum Search**

**Full Text Search**

Search for Keywords

Search Anywhere  
 Search for Title  
 Search Content

**Search Options**

Category  ▼

Visibility  ▼

Status  ▼

User Roles  ▼

Author (Last Name)

**Display Options**

Previous Posts  ▼

Sort By  ▼

Sort Order  Ascending  Descending

3. Enter the relevant search option

For more information regarding using the Keyword search option, see [Full Text Search](#) information.

4. Click Search

The table of results will be displayed with related Forum details.

5. Click on a Forum Topic name to display the Topic screen.

## Forum Bookmarks

To view a list of Topics that have been flagged for easy access use the Bookmarks button within the Forums list. Within the Flagged Topics list, Users can set the Email Notification option to Yes for the system to send an email when a new post is added to a Topic.



| Flagged Topics     |                    |                   |                |   |       |  |       |        |  |
|--------------------|--------------------|-------------------|----------------|---|-------|--|-------|--------|--|
| Forums             |                    |                   |                |   |       |  |       |        |  |
| Topic              | Forum              | Created           | Author         | Replies   | Views | Last Post                                  | Email | Delete |  |
| Problem KB         | Problem Management | 01/19/16<br>11:03 | Jason Blackett | 1   | 4     | 01/19/16 11:05                             | No    | Delete |  |
|                    |                    |                   |                | Toggle to Yes, to get Email updates on this topic |       | Click to remove the topic from Flaged list |       |        |  |
| 1 - 1 of 1 Results |                    |                   |                |   |       |  |       |        |  |

The Delete option link allows the User to remove the Topic from the Flagged Topics list.

## 2.9.8 Surveys

The Service Desk can obtain feedback regarding the quality of support provided to Customers and any other issues by distributing Surveys to Service Desk staff and Customers. Surveys within the system can be created for specific Users or User Role groups, Customers who have logged requests and anyone who accesses the Service Desk.

---

**NOTE:** Users can only access the Knowledge>Surveys option to create Surveys, if the Survey Manager field has been ticked within the User>Users>User Information screen.

---

Refer to [Surveying Customer Sentiment](#) for additional information about surveys and customer satisfaction.

### Creating a Survey

To create a new Survey:

1. Select Knowledge > Surveys
2. Click New

3. Enter a Survey Title
4. Enter a Survey Description
5. Select an Audience:

---

### Survey Details

---

| Audience Type | Description |
|---------------|-------------|
|---------------|-------------|

---

---

## Survey Details

---

Serviced Customer

Send on Resolution

Send Survey

Send Once Only

A Survey is issued to Customers who have had a request resolved by service desk staff. This Survey type is available to Customers within the Customer Portal.

**NOTE:** Only one survey for the Serviced Customer audience can be published at a time.

If Serviced Customer is selected as the audience, an option called Send on Resolution becomes visible. When this option is enabled and a request is resolved, an email is automatically dispatched to the Customer asking them to complete a Survey.

If the Send on Resolution option is left disabled, the email must be sent manually. To send the email, select a closed request and click  within the Summary Information screen. An email is sent to the Customer with a Survey.

Select this option if you want Customers to receive the Serviced Customer Survey once and not on multiple occasions.

Serviced Customers

(1 in 5)

Everyone

Sends the survey to one in five Customers who log a request with the service desk.

A Survey that is published for all Users groups, including the Public Portal, Technicians and Customers.

When this option is set and the Allow Anonymous option is set to No, the survey will not be available on the Public Survey Portal.

Specific Customer

Email Notification

A Survey generated for a specific Customer/s.

If a specific Customer is selected:

1. Click the add button to invite Customers to the Survey
2. Search and select Customers
3. Select Save, to assign the Customer/s.

To notify the Customer via email, select the Email Notification option. When the Survey is published, an email is sent to the Customer/s.

Roles

Raise Alert

A Survey generated for a specific User Role/s.

If Roles is selected, a list of User Roles is displayed. Select the User Roles to receive the Survey.

To generate an Alert when the survey is published, select the Raise Alert option.

---

---


## Survey Details

---

Customers By Org Unit

Selected Org. Units


A Survey generated for Customers within one or more Organizational Units. When selected and saved, the option to assign Organizational Units is displayed.

Click the  to search and assign Org Units.

Customers By Item Type

Select Item Types

A Survey generated for Customers using one or more Item Types. When selected and saved, the option to assign Item Types is displayed.


Click the  to search and assign one or more Item Types.

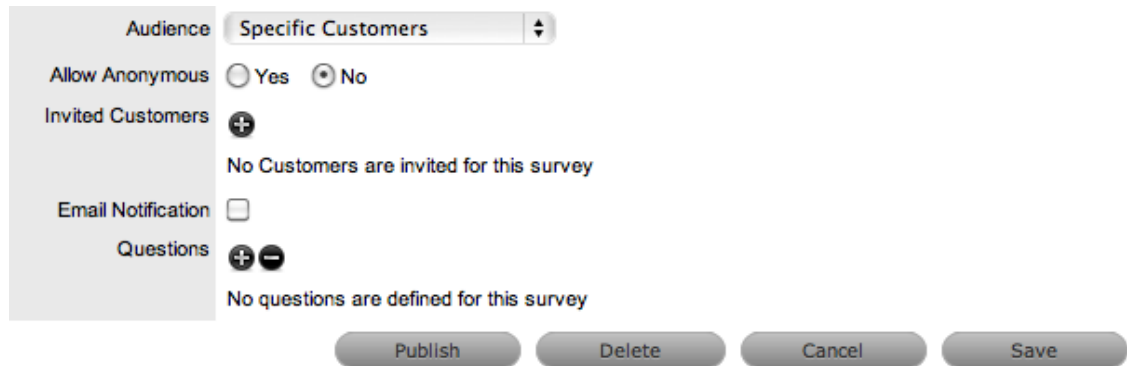
Allow Anonymous

Allows Customers to complete the Survey without their identity being recorded.




When this option is set to No and the survey audience is set to Everyone, the survey will not be available on the Public Survey Portal.

---

4. Click Save to add questions to the Survey
5. In the Questions field click  to create a new Survey question

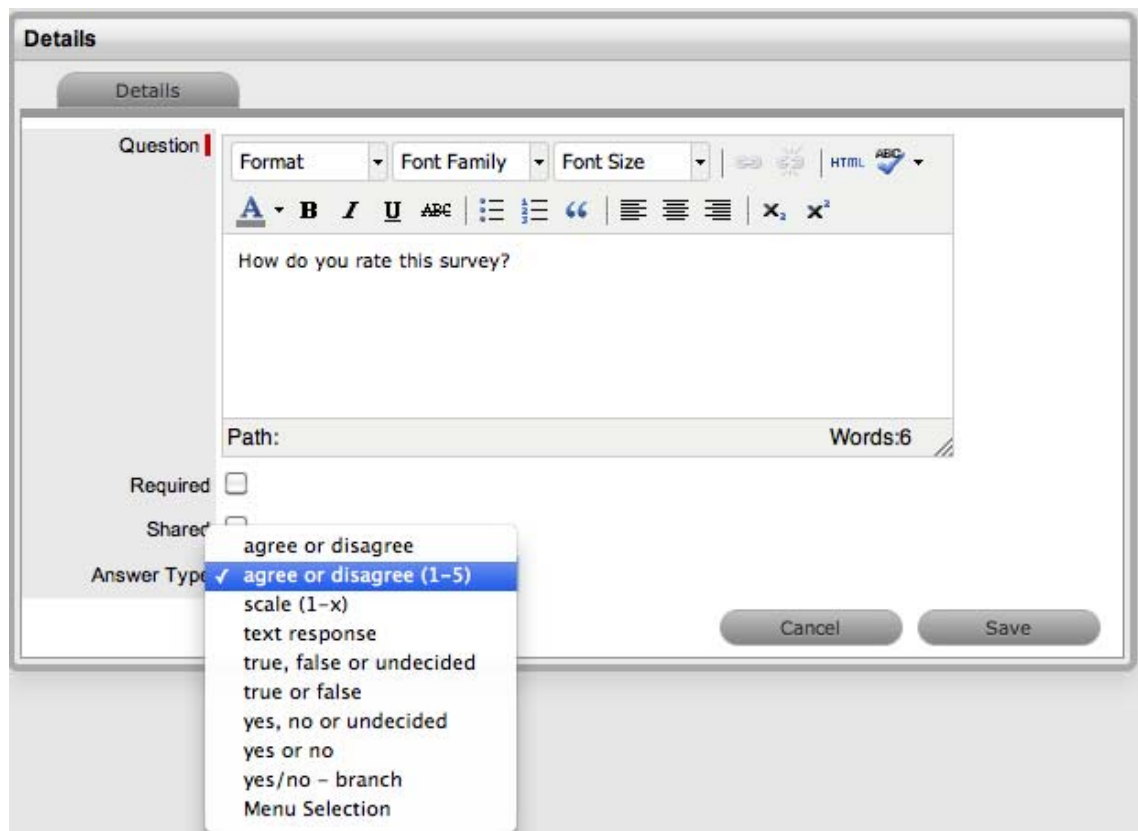


The image shows a configuration panel for a survey. It has a light gray background and contains several settings:

- Audience:** A dropdown menu currently set to "Specific Customers".
- Allow Anonymous:** Two radio buttons, "Yes" and "No". The "No" button is selected.
- Invited Customers:** A plus icon () followed by the text "No Customers are invited for this survey".
- Email Notification:** An unchecked checkbox.
- Questions:** Plus and minus icons ( ) followed by the text "No questions are defined for this survey".

At the bottom of the panel are four buttons: "Publish", "Delete", "Cancel", and "Save".

6. Enter the Question text




7. Check the Required option if an answer is mandatory
8. Tick Shared, if this question is to be included in surveys created by duplicating this survey in the future  
If selected, these questions cannot be edited in the newly created duplicated survey.
9. Select an Answer Type:



| Answer Type              | Description   |
|--------------------------|---|
| Agree or Disagree        | Displays the options to Agree or Disagree.  |
| Agree or Disagree (1-5)  | Displays the options to Agree or Disagree on a scale of 1 to 5.   |
| Scale (1-x)              | Provides the option to define the rating scale from 1 to 10. When selected, the Scale field is displayed allowing the User to define the range. |
| Text Response            | Provides a text box for text based responses.   |
| True, False or Undecided | Displays the options of True, False and Undecided.  |
| True or False            | Displays the options of True or False.  |
| Yes, No or Undecided     | Displays the options of Yes, No and Undecided.  |
| Yes or No                | Displays the options of Yes or No.  |

| Answer Type     | Description   |
|-----------------|---|
| Yes/No - branch | <p>Allows a further question to be asked based on a Yes or No answer given for the current question.</p> <p>When using this option, it may be necessary to return to the question configured with this selection after all the questions have been created for the survey, so the Branch Question can be configured appropriately.</p> <p>If End is selected, the User screen will automatically close when the configured selection is made.</p> |
| Menu Selection  | <p>Provides a list of possible responses.</p> <p>To create a list of responses:</p> <ol style="list-style-type: none"> <li>1. Click New</li> <li>2. Enter a response name</li> <li>3. Click Save</li> <li>4. Repeat to add multiple options.</li> </ol>   |

5. Click Save

6. Click  to enter additional questions  
(Refer to Steps 8 to 11 above)

7. Re-order the questions, if required

Check the box next to the relevant question and use  or  to move it in the appropriate direction.

8. When all questions are entered in the correct order, select Save.

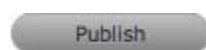
The Survey is now ready for publication.

## Publishing a Survey

After a Survey has been created, it must be published in order for it to be available to Customers and Users. Published Surveys are accessible through the Feedback tab.

To publish a Survey:

1. Select Knowledge > Surveys
2. Select the hyperlink of an unpublished Survey
3. Click Edit
4. Select



### Information

This survey has been published. Please check the end date

**Details**

Details

Responses

Results

Title

Sample Survey

Description

An example of how surveys are constructed.

Audience

Everyone

Allow Anonymous

No

Start Date

05/08/12 16:51

End Date

06/07/12 00:00

📅

Direct Link

<http://localhost:8080/LiveTime/WebObjects/LiveTime.woa/wa/CustomerSurveys?surveyId=1>

Cancel Survey

[Cancel Survey](#)

Questions

| Number | Response             | Question                           | Shared |
|--------|----------------------|------------------------------------|--------|
| 1      | scale (1-x)          | How do you rate this survey?       | ✖      |
| 2      | yes, no or undecided | Could it be improved?              | ✔      |
| 3      | text response        | If yes, how? If undecided, why so? | ✔      |

Cancel

Save

5. Enter an End Date for the Survey

By default the end date is set to one month after the start date. To modify the default end date, select a date within the calendar icon. The start date is set to the date the Survey is published.

6. Click Save.

A direct hyperlink is also created and saved with the survey. This can be sent to audience members for direct access to the survey.

---

**NOTE:** When a Survey is published it can no longer be edited.

To deactivate a Survey, adjust the End Date or click the cancel link within the Details tab of the Survey.

---

## Duplicating a Survey

Surveys can be duplicated both before or after publication.

To duplicate a Survey:

1. Select Knowledge > Surveys
2. Select the hyperlink of a Survey
3. Click the Duplicate button

The duplicate Survey is displayed.

4. Update the duplicate Survey, as required
5. Click Save.

The Survey is saved and ready to publish.

---

**NOTE:** Questions cannot be edited if they are duplicated from a Published Survey.

---

## 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, the survey can be accessed within the Home>Feedback screen:

1. Select Home > Feedback
2. Select the Fill Survey hyperlink
3. Complete the Survey
4. Click Done.

To complete a Survey within the Home Page of the Customer Portal:

1. Select Survey within the Menu side-bar
2. Select the Take Survey hyperlink
3. Complete the Survey
4. Click Done.

To complete a Survey as a Public User:

1. At the login page select Public Access Surveys
2. Select the Fill Survey hyperlink
3. Complete the Survey
4. Click Done.

## Viewing the results of a Survey

As a Survey is completed, the results are collated on a per User basis and summarized into a chart.

To view the results per User:

1. Select Knowledge > Survey
2. Select the relevant completed Survey's hyperlink
3. Select the Users tab

A list of Survey participants is displayed.



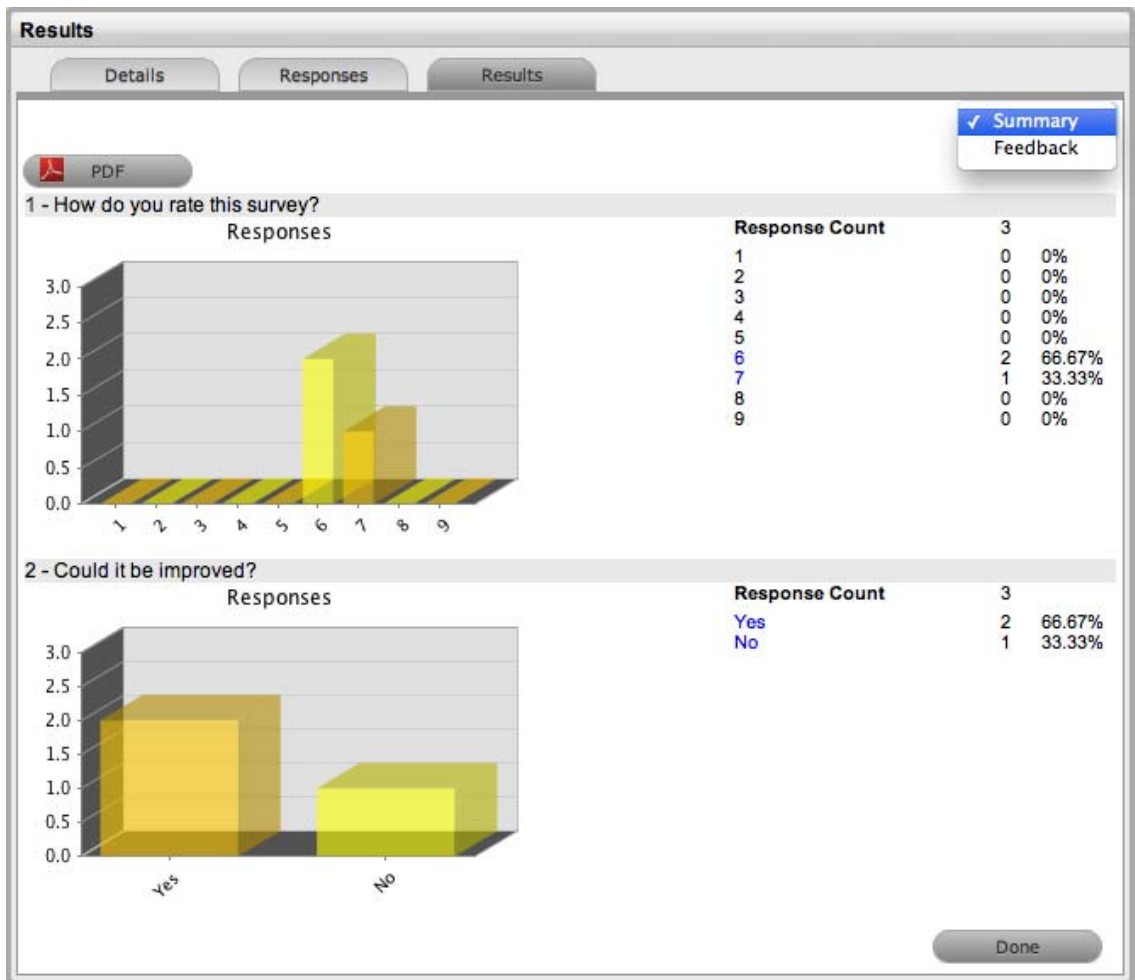
4. Select View to display the full response for each User.



To view a summary of results:

1. Select Knowledge > Survey
2. Select the relevant completed Survey's hyperlink
3. Select the Summary tab

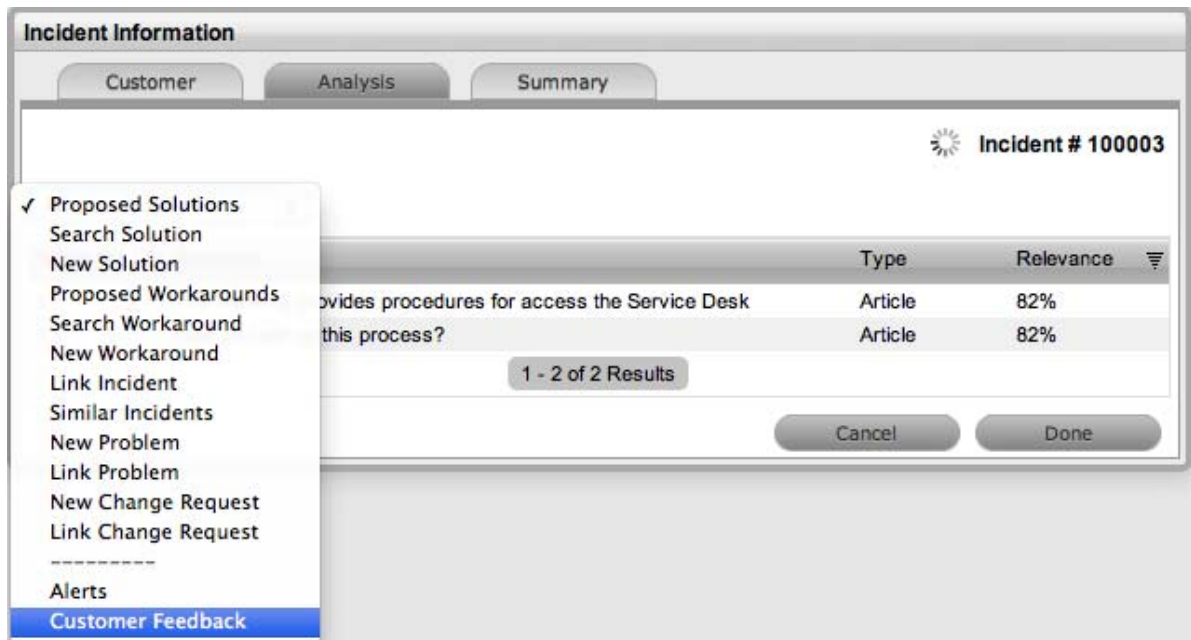
Each Survey question will be summarized and charted.



4. For text based questions, select Feedback from the drop-down list provided.

A list of text responses is displayed.

The completed Surveys sent to Serviced Customers upon resolution of an Incident, are also accessible within the Analysis tab of the Incident.



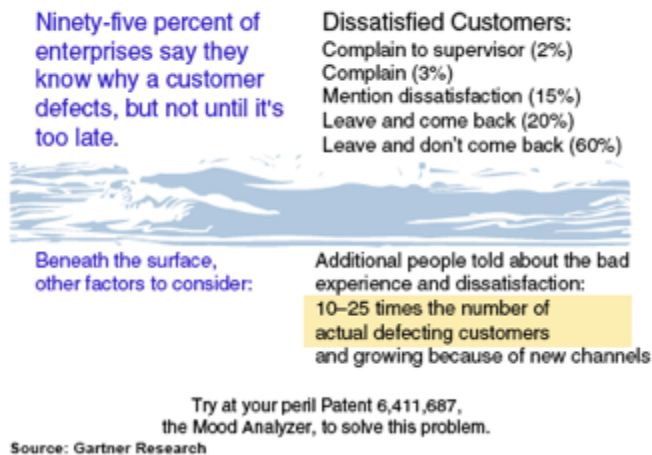
Refer to [Surveying Customer Sentiment](#) for indepth information about surveys and customer satisfaction.

## 2.9.9 Surveying Customer Sentiment

As a support organization that has automated its Service Desk, time has been invested in auditing manual workflow lifecycles and mapping them into the service management system. Consideration has been given to the way support teams work, what are the areas of speciality and by whom they are supported. Service Level Agreements have been agreed on and implemented, hopefully, with contractual obligations being met more often than not. There are very few customer complaints so on the surface of things all is going well, or is it?

System generated statistics capture operational data such as response time and resolution time, which are great for measuring the efficiency of the support service but do not garner the customers sentiment about the support organization (i.e., are they satisfied? Do they have confidence in the support provided?), based on their interaction with the Service Desk.

Figure 1. The Dynamics of Customer Dissatisfaction



Service Desk Supervisors who are serious about providing the best possible support and building an environment of continual service improvement must conduct surveys. A variety of surveys should be issued, the results evaluated and action plans adopted relative to the survey response data. To gain a true measure of customer satisfaction with the support service, surveys are a must.

Surveys provide core indicators of satisfaction levels with the service and systems delivered by the Service Desk, and enhance customer satisfaction, support efficiency and cost effectiveness metrics. Measuring end-user satisfaction relative to service desk goals can also assist in determining staff levels and training requirements, budget allocations, outsourcing strategies, IT strategy and rewards for service desk managers and staff.

Good surveys reveal patterns, trends and new information valuable to improving customer service. Three elements that are crucial to successful surveying include:

- ♦ Asking the right questions
- ♦ Asking at the right time
- ♦ Following up feedback.

Even with the first two elements correct, if feedback is ignored, the Service Desk risks alienating its customers and undermining the customer's confidence in the service.

## Real Time Surveys

Gartner Research indicates that 40% of responses are more accurate if customers are surveyed within 24 hours of the service desk interaction. There is also a 10 to 12% increase in response rates with customers who are surveyed immediately after a transaction (Kolsky, 2006). Gartner assessed real-time feedback as ideal and our service management system allows Service Desk operators to survey all customers when a support request is resolved.

The auto-sending of surveys within the system overcomes Gartner's observed drawbacks of real time surveys being costly and non-scalable.

## Customer Satisfaction Surveys

Building on the trends observed by the point-of-delivery surveys, periodic surveys can be used to gain real sense of the customers' perceived relationship with the Service Desk. This type of survey tends to be a little more complicated, detailed and specific than a transaction based survey. The questions responses can be rated on a numeric scale of 1 to 5, with a maximum of seven questions being recommended, as longer surveys tend to have lower response rates.

The sample size could be determined by the responses received to the point-of-delivery survey, as these customers have proved to be reliable in completing surveys. However, respondent details and activities must be recorded to ensure that the same customers are not always asked to complete surveys.

## Surveys to go

Passive surveys can also be used by a Service Desk to provide customers with the opportunity to comment on the service they receive, when the customers feels it is appropriate to do so.

## Service Desk Evolution

Transaction based and periodic surveys are great for monitoring day-to-day activities and base-lining trends of the Service Desk. To assist with forward planning and service desk evolution, more in depth surveys are required. Planning surveys may not necessarily be automated through Survey option within the system, in fact focus groups or face-to-face surveying methods may be preferred.

## Feedback & Analysis

With the potential of numerous survey responses being received, no matter how short the list of questions, the Service Desk Manager must set time aside to view the response statistics. In fact it has been found that poorly executed surveys that have no follow-up, promote greater customer dissatisfaction. Should negative feedback be received, the Service Desk Manager must have an appropriate escalation policy to manage the information.

## Conclusion

The use of surveys by the Service Desk is a positive demonstration to its customers that it is committed to the service it provides. Operational metrics measure the efficiency of the support service but are not a real indicator of customer satisfaction. To effectively monitor customer sentiment, support technicians' capability and build a culture of continual improvement surveys are mandatory. To this end a variety of survey techniques should be adopted by Service Desk Supervisors, which include point-of-delivery, periodic, passive and planning surveys.

(Reference: Kolsky, E., 2006, "Implement Customer Satisfaction Management Processes to Improve Revenue", ID No.:G00134295, 2 March 2006, Page 2. Gartner Research; Kolsky,E. & Maoz, M., 2003 "Using Customer Surveys to Improve Business Processes". ID No.:SPA-19-1128, 7 February 2003, Page 2. Gartner Research.)

## Surveys and Service Management

Surveys created within the service management system can be created for serviced Customers, specific Customers, User Role groups, Customers based on Organizational Unit or Item Type ownership, and the General Public. Surveys can be customized to meet the requirements of each audience types. (See: [Surveys](#) for detailed information about creation and publication of new Surveys in the service management tool.)

### Point of Delivery Surveys

A system Survey Manager can create a point-of-delivery or transaction based survey, within the Knowledge>Survey tab. The Title is completed to reflect the data to be sourced from the customers. The Description that is entered is used to introduce the survey to the Customer when the survey request is emailed to the Customer or accessed on the Customer Portal. From the Audience option, Serviced Customers is selected and the Send on Resolution option is marked to automatically send to the survey to the Customer when their support issue is resolved.

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**NOTE:** Tip: When constructing point-of-delivery or transaction based surveys it is recommended that the survey be short, that is no more than five questions with yes or no answers. Also, to avoid biased results, all customers should be surveyed regarding the service they received.

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**NOTE:** Fact: Only one Point of Delivery Survey can be active within the system at any one time.

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### Customer Satisfaction Surveys

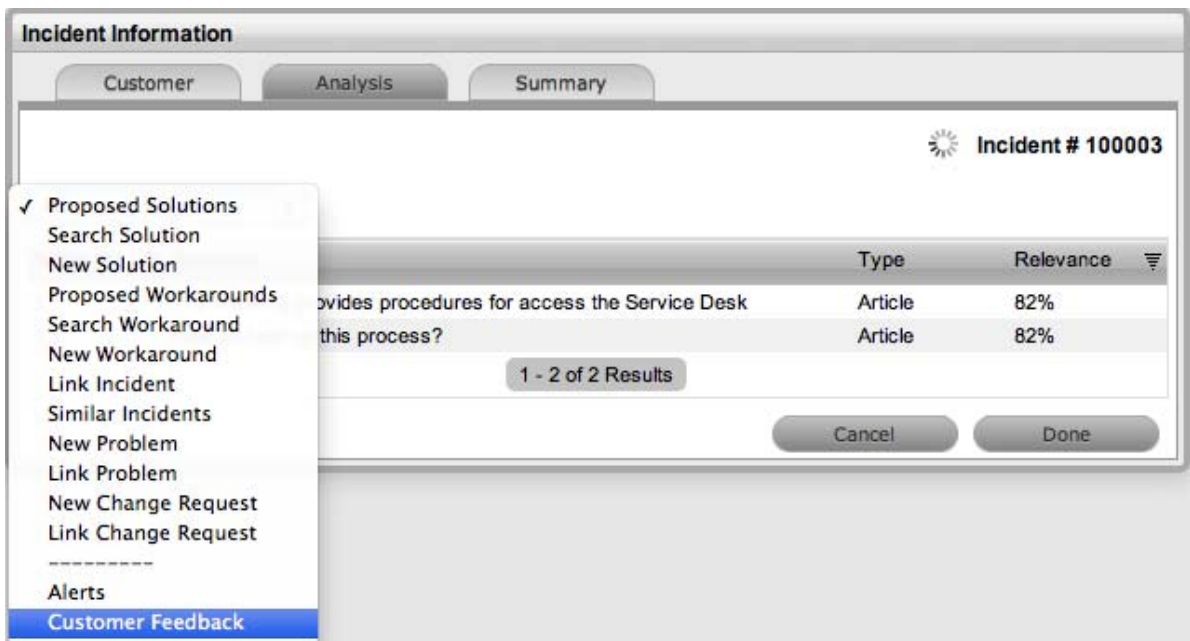
When a survey is created for Serviced Customers and the Send on Resolution option is not selected, the survey can be sent manually after the Incident is closed. The survey can be emailed from within the Incident Summary screen, by clicking the link that appears when the Incident moves to the status of Closed.

---

**NOTE:** Fact: To ensure Customers do not feel bombarded by the Service Desk, the system will not allow the same survey to be sent to the same customer on multiple occasions. There is also the ability to create Serviced Customers (1in 5) surveys.

---

The completed Surveys sent to Serviced Customers upon resolution of an Incident, are also accessible within the Analysis tab of the Incident.



## Public Surveys

Published surveys have the Audience defined as 'Everyone' and can be accessed using the Public Surveys link on the system Login page. These 'surveys to go' are completed by end-users without logging into the Customer Portal.

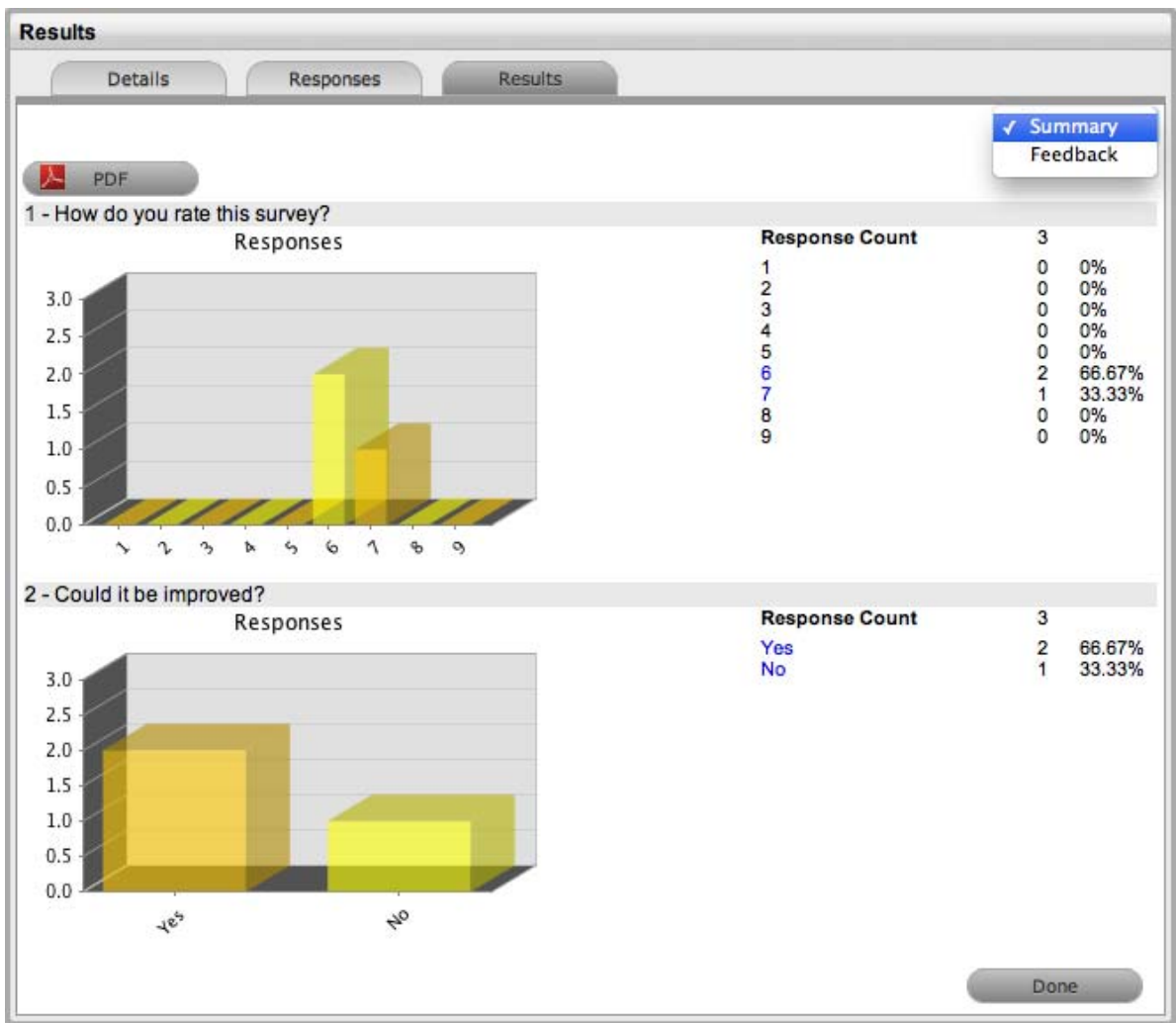
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**NOTE:** To allow Customers complete these Surveys anonymously, ensure the Allow Anonymous option is enabled.

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## Survey Results

Survey Results are visible under the Summary tab of an Active survey.



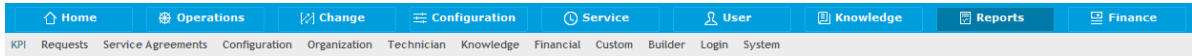
Graphical indicators and response percentages are displayed within the Summary filter of the Summary screen. If free text fields are used to obtain Customer comments, they can be accessed in the Feedback filter of the Survey Results Summary tab.

See: [Surveys](#) for detailed information about creation and publication of new Surveys in the service management tool.

## 2.10 Reports

- ◆ [Section 2.10.1, "Create a Report,"](#) on page 860
- ◆ [Section 2.10.2, "Trend Reports,"](#) on page 861
- ◆ [Section 2.10.3, "Custom Reports,"](#) on page 862
- ◆ [Section 2.10.4, "KPI Reports,"](#) on page 863
- ◆ [Section 2.10.5, "Requests,"](#) on page 864
- ◆ [Section 2.10.6, "Service Agreement Reports,"](#) on page 873
- ◆ [Section 2.10.7, "Configuration Reports,"](#) on page 876
- ◆ [Section 2.10.8, "Organization Reports,"](#) on page 876

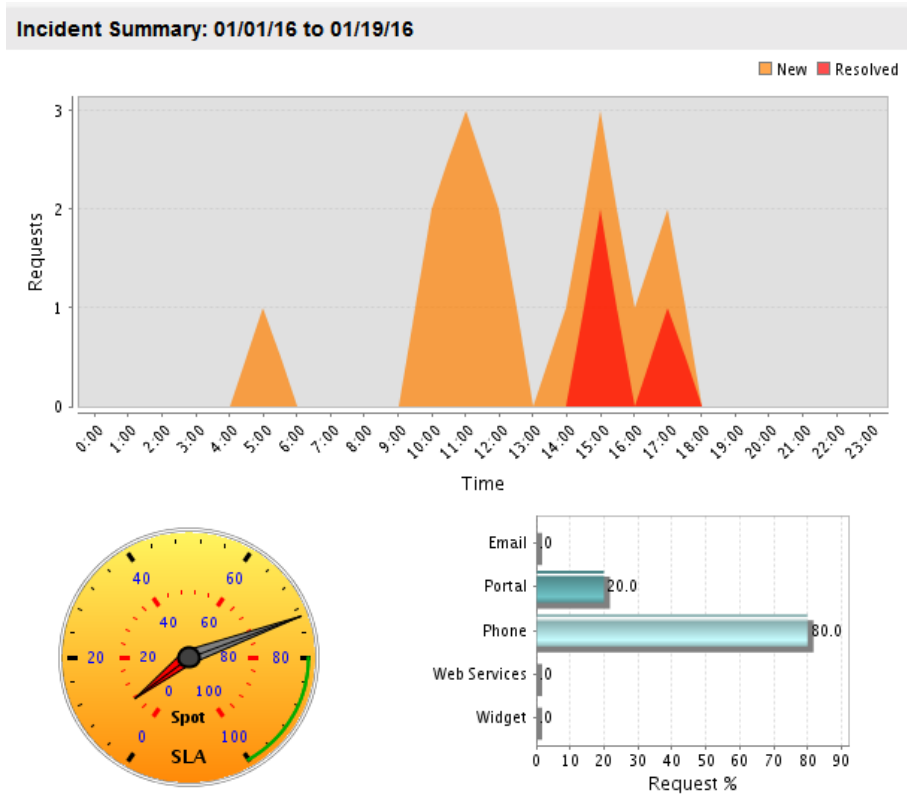
- ◆ Section 2.10.9, “Technician Reports,” on page 878
- ◆ Section 2.10.10, “Knowledge Reports,” on page 879
- ◆ Section 2.10.11, “Financial Reports,” on page 880
- ◆ Section 2.10.12, “Report Builder,” on page 881
- ◆ Section 2.10.13, “Login Report,” on page 892
- ◆ Section 2.10.14, “System Reports,” on page 893



Online reporting provides Supervisors with a graphical snapshot of the overall performance of the Service Desk and its Users. The real-time Reports Module delivers easy access, and on-demand visual feedback that can be exported to Excel and PDF format.

## 2.10.1 Create a Report

1. Select Reports> Report Type (e.g. Incident) sub-menu option
2. Select a Process, if relevant
3. Use the drop-down list to select the report required
4. Enter the date range, if applicable  
The default Start Date is the last day of the previous month.
5. Refine parameters, if required
6. Click Create to generate the report.





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**NOTE:** The results are displayed as a chart and as a text table. They both can be exported as an Excel spreadsheet or as a PDF document.

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## 2.10.2 Trend Reports

A Trend Report allows data to be compared over time to monitor patterns. This type of report is only available for Incident, Problem, Service and Change Requests.

To create a Trend report:

1. Select Reports> Report Type (e.g. Incident) sub-menu option
2. Use the drop-down list to select the required report
3. Select the Trend checkbox

The screenshot shows a web interface for configuring an Incident Report. The 'Incident Reports' section is active. The 'Process' is set to 'Incident Reports' and the 'Report Type' is 'Open Incidents by Priority'. The 'Start Date' is 01/01/16 and the 'End Date' is 01/19/16. The 'Trend' checkbox is checked, and a dropdown menu is open showing options: Day, 3 Days, Week (highlighted), Fortnight, and Month. A 'Create' button is located to the right of the dropdown menu.

4. If the trend data is available for the selected report, a drop-down field appears. Select a period for the data:

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### Date Ranges for Trend reports:

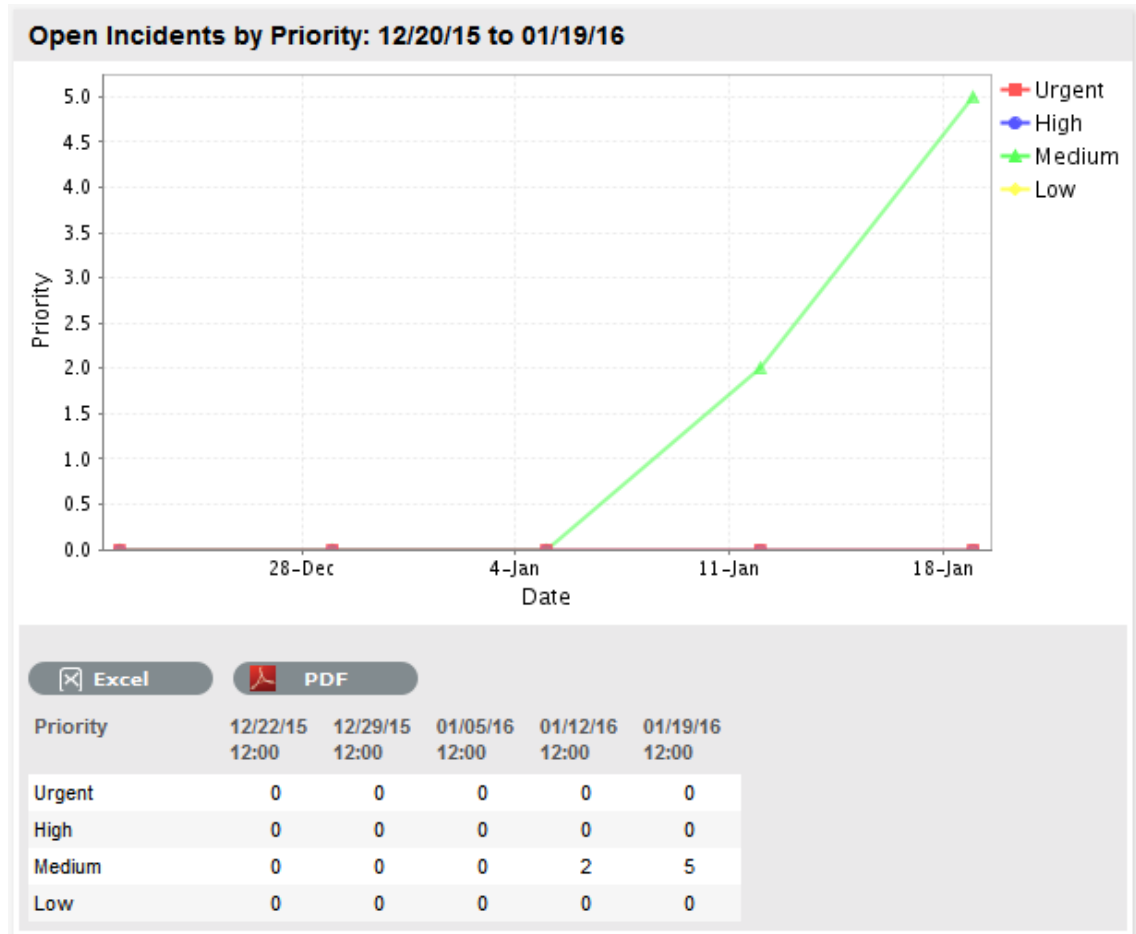
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|           |                           |
|-----------|---------------------------|
| Day       | Up to 14 days.            |
| 3 Days    | Up to 30 days.            |
| Week      | Up to at least 10 weeks.  |
| Fortnight | Up to at least 10 weeks.  |
| Month     | Up to at least 12 months. |

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5. For Start Date, enter the start date or click on the calendar icon to define it within the calendar
6. Enter the End Date or select it from the calendar

7. Click Create.



### 2.10.3 Custom Reports

To provide Users with access to service management data that is more meaningful and relevant to their organization create customized reports. Reports relevant to their organizational requirements can be uploaded into the system within the Admin>Reports>Customize tab for use in the Reports >Custom tab.

The following Reports are available for business analysis:

- ◆ [KPI Reports](#)
- ◆ [Incident Reports](#)
- ◆ [Problem Reports](#)
- ◆ [Change Request Reports](#)
- ◆ [Service Request Reports](#)
- ◆ [Configuration Reports](#)
- ◆ [Service Agreement Reports](#)
- ◆ [Organization Reports](#)
- ◆ [Technician Reports](#)

- ◆ [Knowledge Reports](#)
- ◆ [Financial Reports](#)
- ◆ [Builder](#)
- ◆ [Login Reports](#)
- ◆ [System Reports.](#)

## 2.10.4 KPI Reports

Key Performance Indicators (KPIs) are quantifiable measurements of performance used to define success factors, and indicate the progress towards organizational goals. System KPI reports are designed to provide a measure of the service and support operation success relative to management of requests over a period of time. Reports can be queried on any date range, up to 31 days.

Manager and Supervisor Users can generate these metrics on a weekly or monthly basis.

KPI Reports can be generated for:

- ◆ Service Requests
- ◆ Incidents
- ◆ Problems
- ◆ Change Requests
- ◆ Service Level Agreements
- ◆ Organizational Units
- ◆ Team.

| KPI Reports       | Description   |
|-------------------|---|
| Total Requests    | The number of requests included in the date range queried.  |
| Total New         | The number of newly created requests included in the date range queried.  |
| Total Resolved    | The number of requests resolved during the date range queried.  |
| Days              | The number of days included in the report.  |
| New Requests/Day  | The number of requests handled per day.   |
| Resolved/Day      | The number of requests resolved per day.  |
| Resolved Same Day | The number of requests that were resolved on the same day that they were created. This is based on the calendar date of the original request, logged in the timezone of the server that hosts the system. |
| Resolved On Spot  | The number of requests resolved by the Technician, within 10 minutes of being opened.   |
| Spot Rate %       | Percentage of requests resolved on-the-spot against the total number of Incidents.  |

| KPI Reports          | Description  |
|----------------------|--|
| Mean Resolution Time | The average time, calculated in minutes, it takes to resolve requests over the date range queried.                                     |
| via Email            | The number of requests created via email.  |
| via Portal           | The number of requests created by Customers via a portal, including any requests created by web services.                              |
| via Phone            | The number of requests created in the User Portal for Customers by Technicians.  |
| via Web Services     | The number of requests created using Web Services for Customers.   |
| via Widget           | The number of requests created by Customers using the system Widget.   |
| SLA Achieved         | The number of requests that met SLA targets.   |
| SLA Breached         | The number of requests that breached SLA targets.  |
| Resolution Layer 0   | The number of requests resolved at the point of request creation or for requests that are resolved with no time recorded against them. |
| Resolution Layer X   | The number of requests resolved at the Layer of escalation shown.  |

**NOTE:** Requests created via web services are reported as via Phone if the services are using a service account.

## 2.10.5 Requests

- ◆ [“Service Request Reports” on page 864](#)
- ◆ [“Incident Reports” on page 866](#)
- ◆ [“Problem Reports” on page 869](#)
- ◆ [“Change Reports” on page 871](#)

### Service Request Reports

Service Request Report options include:

| Service Request Reports           | Description  |
|-----------------------------------|--|
| Open Service Requests by Priority | The total of all Requests for each Priority (Urgent, High, Medium, Low).                             |
| Open Service Requests by Age      | All Open Requests grouped by day ranges (Age of the issue between 0-3, 3-7, 7-14, 14-28, 28 > days). |

| <b>Service Request Reports</b>             | <b>Description</b>  |
|--|---|
| Open/Resolved by Category                  | Displays the total amount of created, opened and resolved Service Requests per Item Category.                             |
| Open/Resolved Service Requests by Team     | Displays the total amount of created, opened and resolved Service Requests per Team.                                      |
| Open/Resolved by Item Type                 | Displays the total amount of created, opened and resolved Service Requests per Item Type.                                 |
| Service Request Time by Priority           | The average time, in minutes, it has taken to resolve Service Requests against each Priority (Urgent, High, Medium, Low). |
| Service Requests by Status (Active)        | Based on the selected Service Request Workflow, the total amount of Requests for each Status.                             |
| Service Requests by Status (Closed)        | Based on the selected Service Request Workflow, the total amount of Requests for each Status.                             |
| Service Requests by Team                   | The total of all Requests created for each support Team.  |
| Service Requests by Item Type              | The total of all Requests created against each Item Type  |
| Service Requests by Customer               | The total of all Requests each Customer has logged.   |
| Service Requests by Item                   | The total of all Requests created against each Item.  |
| Service Requests by Classification         | Based on Item Category, the total amount of Requests against each Classification.   |
| Service Requests by Item Category          | The total of all Service Requests created per Item Category.  |
| Service Requests by Service Level          | The total of all Requests for each SLA.   |
| Service Requests by Organization           | The total Requests against each Organization within the system.   |
| Service Requests by Workflow               | The total number of Service Requests logged against each Workflow.  |
| Service Requests by Created Technician     | The total number of Service Requests created by each Technician   |
| Service Requests by Service Infrastructure | The total number of Service Requests logged against Service Infrastructure Items.   |
| Service Requests by Original Technician    | The total number Service Requests against the first assigned Technician when logged with the system.                      |
| Service Requests by QuickCall Usage        | The total number of Requests created using QuickCall templates.   |
| Service Requests by Root Cause             | Service Requests where Items have been changed, displaying the original Item and current Item information.                |

| <b>Service Request Reports</b>            | <b>Description</b>  |
|---|---|
| Service Requests Timesheet by Date        | Sorted by Date, displays a detailed list of Requests.   |
| Service Requests Timesheet by Customer    | Sorted by Customers, displays a detailed list of Requests currently assigned to the Customer.                     |
| Service Requests Timesheet by Technicians | Sorted by Technicians, displays a detailed list of Requests currently assigned to the Technicians.                |
| Service Requests Timesheet by Org. Unit   | Sorted by Org.Unit, displays a detailed list of Requests currently assigned to the Organizational Unit.           |
| Logged Time by Team                       | The average time, in minutes, it has taken each Team to resolve their Requests.                                   |
| Logged Time Item Type                     | The average time, in minutes, it has taken to resolve Requests for each Item Type.                                |
| Logged Time by Service Level              | Against an SLA, the average time, in minutes it has taken to resolve a RFC.                                       |
| Logged Time by Priority                   | The average time, in minutes, it has taken to resolve Requests against each Priority (Urgent, High, Medium, Low). |
| Logged Time by Org Unit                   | The average time, in minutes, it has taken to resolve Requests for each Org Unit.                                 |
| Logged Time by Customer                   | The average time, in minutes, it has taken to resolve Requests for each Customer.                                 |
| Mean Open Time by Item Type               | Against each Item Type, the average time in hours, Requests have been open.                                       |
| Mean Open Time by Priority                | Against each Priority, the average time in hours, Requests have been open.  |
| Mean Open Time by Team                    | Against each Team, the average time in hours, Requests have been open.  |
| Mean Open Time by Customer                | Against each Customer, the average time in hours, Requests have been open.  |
| Mean Open Time by Org. Unit               | Against each Org. Units, the average time in hours, Requests have been open.                                      |

---

**NOTE:** Service Request Time: Service Request Time Reports are based on the Logged Time calculated for a Service Request. Logged Time is the amount of time in minutes a Service Request has been worked on by Technicians.

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## Incident Reports

Incident Report options include:

| <b>Incident Reports</b>              | <b>Description</b>  |
|--------------------------------------|---|
| Open Incidents by Priority           | The total of all Open Incidents against each Priority (Urgent, High, Medium, Low).                      |
| Open Incidents by Age                | All Open Incidents grouped by day ranges (age of the issue between 0-3, 3-7, 7-14, 14-28, 28 > days).   |
| Open/Resolved by Category            | Displays the total amount of created, opened and resolved Incidents per Item Category.                  |
| Open/Resolved Incidents by Team      | Displays the total amount of created, opened and resolved Incidents per Team.                           |
| Open/Resolved Incidents by Item Type | Displays the total amount of created, opened and resolved Incidents per Item Type.                      |
| Closed Incidents by Age              | All Closed Incidents grouped by day ranges (Age of the issue between 0-3, 3-7, 7-14, 14-28, 28 > days). |
| Incidents by Priority                | The total of all Incidents for each Priority (Urgent, High, Medium, Low).                               |
| Incidents by Status (Active)         | Based on the Incident workflow, the total amount of active Incidents by Status.                         |
| Incident by Status (Closed)          | Based on the Incident workflow, the total amount of inactive Incidents by Status.                       |
| Incidents by Team                    | The total of all Incidents created for each support Team.   |
| Incidents by Item Type               | The total of all Incidents created against each Item Type.  |
| Incidents by Customer                | The total of all Incidents each Customer has logged.  |
| Incidents by Item                    | The total of all Incidents created against each Item.   |
| Incidents by Classification          | Based on Item Category, the total of all Incidents against each Classification.                         |
| Incidents by Item Category           | The total of all Incidents created per Item Category.   |
| Incidents by Service Level           | The total of all Incidents for each Service Level Agreement.  |
| Incidents by Organization            | The total Incidents against each Organizational in the system.  |
| Incidents by Workflow                | The total Incidents assigned against each Incident Workflow in the system.                              |
| Incidents by Created Technician      | The total number of Incidents created by each Technician  |
| Incidents by Service Infrastructure  | The total number of Incidents logged against Service Infrastructure Items.                              |

| <b>Incident Reports</b>            | <b>Description</b>   |
|------------------------------------|--|
| Incidents by Escalation            | The total Incidents against each escalation layer within the system.   |
| Incidents by Original Technician   | The total number Incidents against the first assigned Technician when logged with the system.                      |
| Incidents by QuickCall Usage       | The total number of Incidents created using QuickCall templates.   |
| Incidents by Root Cause            | Incidents where Items have been changed, displaying the original Item and current Item information.                |
| Incidents Timesheet by Date        | Sorted by date, displays a detailed list of Incidents created on that day.   |
| Incidents Timesheet by Customer    | Sorted by Customer, displays a detailed list of Incidents for Customers.   |
| Incidents Timesheet by Technicians | Sorted by Technician, displays a detailed list of Incidents currently assigned to the User.                        |
| Incidents Timesheet by Org Unit    | Sorted by Org.Unit, displays a detailed list of Incidents currently assigned to the Organizational Unit.           |
| Logged Time by Team                | The average time, in minutes, it has taken a Team to resolve their Incidents.                                      |
| Logged Time Item Type              | The average time, in minutes, it has taken to resolve Incidents for each Item Type.                                |
| Logged Time by Service Level       | Against a service level, the average time, in minutes it has taken to resolve an Incident.                         |
| Logged Time by Priority            | The average time, in minutes, it has taken to resolve Incidents against each Priority (Urgent, High, Medium, Low). |
| Logged Time by Org Unit            | The average time, in minutes, it has taken to resolve Incidents for each Org Unit.                                 |
| Logged Time by Customer            | The average time, in minutes, it has taken to resolve Incidents for each Customer.                                 |
| Mean Open Time by Item Type        | Against each Item Type, the average time in hours, Incidents have been open.                                       |
| Mean Open Time by Priority         | For each Priority the average time in hours, Incidents have been open.   |
| Mean Open Time by Team             | Against each Team, the average time in hours, Incidents have been open.  |
| Mean Open Time by Customer         | Against each Customer selected, the average time in hours, Incidents have been open.                               |
| Mean Open Time by Org. Unit        | Against each Org. Unit selected, the average time in hours, Incidents have been open.                              |



| <b>Incident Reports</b>         | <b>Description</b>   |
|---------------------------------|--|
| Service Incidents by Root Cause | Incidents created against Service Items, where the Item has been updated, displaying the original Item and current Item information. |

**NOTE:** Incident Time: Incident Time Reports are based on the Recorded Time calculated for an Incident. Recorded Time is the amount in minutes an Incident has been worked on by Technicians.

## Problem Reports

Problem Report options include:

| <b>Problem Reports</b>      | <b>Description</b>   |
|-----------------------------|--|
| Open Problems by Priority   | The total amount of Open Problems against each Priority (Urgent, High, Medium, Low).                     |
| Open Problems by Age        | All Open Problems grouped by day ranges (Age of the Problem between 0-3, 3-7, 7-14, 14-28, 28 > days)    |
| Open/Resolved by Category   | Displays the total amount of created, opened and resolved Problems per Item Category.                    |
| Open/Resolved by Team       | Displays the total amount of created, opened and resolved Problems per Team.                             |
| Open/Resolved by Item Type  | Displays the total amount of created, opened and resolved Problems per Item Type.                        |
| Closed Problems by Age      | All Closed Problems grouped by day ranges (Age of the problem between 0-3, 3-7, 7-14, 14-28, 28 > days). |
| Problems by Priority        | The total of all Problems for each Priority (Urgent, High, Medium, Low).                                 |
| Problems by Status (Active) | Based on the Problem Workflow, the total amount of Problems for each status.                             |
| Problems by Status (Closed) | Based on the Problem Workflow, the total amount of Problems for each Status.                             |
| Problems by Team            | The total of all Problems created for each support Team.   |
| Problems by Item Type       | The total of all Problems created against each Item Type.  |
| Problems by Customer        | The total of all Problems each Customer has logged.  |
| Problems by Item            | The total of all Problems created against each Item.   |
| Problems by Classification  | Based on Item Category, the total amount of Problems against each Classification.                        |
| Problems by Item Category   | The total of all Problems created per Item Category.   |

| <b>Problem Reports</b>             | <b>Description</b>  |
|------------------------------------|---|
| Problems by Service Level          | The total of all Problems for each Service Level Agreement.   |
| Problems by Organization           | The total Problems against each Organizational Unit in the system.  |
| Problems by Workflow               | The total Problems assigned against each Problem Workflow in the system.  |
| Problems by Created Technician     | The total number of Problems created by each Technician   |
| Problems by Service Infrastructure | The total number of Problems logged against Service Infrastructure Items.   |
| Problems Timesheet by Date         | Sorted by Date, displays a detailed list of Problems.   |
| Problems Timesheet by Customer     | Sorted by Customers, displays a detailed list of Problems currently assigned to the Customer.                     |
| Problems Timesheet by Technicians  | Sorted by Technicians, displays a detailed list of Problems currently assigned to the Technicians.                |
| Problems Timesheet by Org. Unit    | Sorted by Org.Unit, displays a detailed list of Problems currently assigned to the Organizational Unit.           |
| Logged Time by Team                | The average time, in minutes, it has taken each Team to resolve their Problems.                                   |
| Logged Time Item Type              | The average time, in minutes, it has taken to resolve Problems for each Item Type.                                |
| Logged Time by Service Level       | Against an SLA, the average time, in minutes it has taken to resolve a Problem.                                   |
| Logged Time by Priority            | The average time, in minutes, it has taken to resolve Problems against each Priority (Urgent, High, Medium, Low). |
| Logged Time by Org Unit            | The average time, in minutes, it has taken to resolve Problems for each Org Unit.                                 |
| Logged Time by Customer            | The average time, in minutes, it has taken to resolve Problems for each Customer.                                 |
| Mean Open Time by Item Type        | Against each Item Type, the average time in hours, Problems have been open.                                       |
| Mean Open Time by Priority         | Against each Priority, the average time in hours, Problems have been open.  |
| Mean Open Time by Team             | Against each Team, the average time in hours, Problems have been open.  |
| Mean Open Time by Customer         | Against each Customer, the average time in hours, Problems have been open.  |

| <b>Problem Reports</b>      | <b>Description</b>   |
|-----------------------------|--|
| Mean Open Time by Org. Unit | Against each Org. Units, the average time in hours, Problems have been open. |

**NOTE:** Problem Time: Problem Time Reports are based on the Logged Time calculated for a Problem. Logged Time is the amount in minutes a Problem has been worked on by Technicians.

## Change Reports

Change Report options include:

| <b>Change Request Reports</b>         | <b>Description</b>   |
|---------------------------------------|--|
| Change Requests by Priority           | The total of all Change Requests for each Priority (Urgent, High, Medium, Low).  |
| Open Change Requests by Age           | The total amount of Open Change Requests over time.  |
| Open/Resolved by Category             | Displays the total amount of created, opened and resolved RFCs per Item Category.  |
| Open/Resolved Change Requests by Team | Displays the total amount of created, opened and resolved RFCs per Team.   |
| Open/Resolved by Item Type            | Displays the total amount of created, opened and resolved RFCs per Item Type.  |
| Change Request Time by Priority       | The average time, in minutes, it has taken to resolve Change Requests against each Priority (Urgent, High, Medium, Low). |
| Change Requests by Status (Active)    | Based on the selected Change Workflow, the total amount of Change Requests for each Status.                              |
| Change Requests by Status (Closed)    | Based on the selected Change Workflow, the total amount of Change Requests for each status.                              |
| Change Requests by Team               | The total of all Change Requests created for each support Team.  |
| Change Requests by Item Type          | The total of all Change Requests created against each Item Type  |
| Change Requests by Customer           | The total of all Change Requests each Customer has logged.   |
| Change Requests by Item               | The total of all Change Requests created against each Item.  |
| Change Requests by Classification     | Based on Item Category, the total amount of Change Requests against each Classification.                                 |
| Change Requests by Item Category      | The total of all RFCs created per Item Category.   |
| Change Requests by Service Level      | The total of all Change Requests for each SLA.   |

| <b>Change Request Reports</b>             | <b>Description</b>   |
|---|--|
| Open Change Requests by Age               | All Open Change Requests grouped by day ranges (Age of the issue between 0-3, 3-7, 7-14, 14-28, 28 > days).    |
| Change Requests by Organization           | The total Change Requests against each Organization within the system.   |
| Change Requests by Workflow               | The total Change Requests assigned against each Change Workflow within the system.                             |
| Change Requests by Created Technician     | The total number of Change Requests created by each Technician   |
| Change Requests by Service Infrastructure | The total number of RFCs logged against Service Infrastructure Items.  |
| Change Requests Pending Review            | Change Requests with a review date set will be listed.   |
| Change Requests by QuickCall Usage        | The total number of RFCs created using QuickCall templates.  |
| Change Requests Timesheet by Date         | Sorted by Date, displays a detailed list of Change Requests.   |
| Change Requests Timesheet by Customer     | Sorted by Customers, displays a detailed list of RFCs currently assigned to the Customer.                      |
| Change Requests Timesheet by Technicians  | Sorted by Technicians, displays a detailed list of RFCs currently assigned to the Technicians.                 |
| Change Requests Timesheet by Org. Unit    | Sorted by Org.Unit, displays a detailed list of Change Requests currently assigned to the Organizational Unit. |
| Logged Time by Team                       | The average time, in minutes, it has taken each Team to resolve their Change Requests.                         |
| Logged Time Item Type                     | The average time, in minutes, it has taken to resolve RFCs for each Item Type.                                 |
| Logged Time by Service Level              | Against an SLA, the average time, in minutes it has taken to resolve a RFC.                                    |
| Logged Time by Priority                   | The average time, in minutes, it has taken to resolve RFCs against each Priority (Urgent, High, Medium, Low).  |
| Logged Time by Org Unit                   | The average time, in minutes, it has taken to resolve RFCs for each Org Unit.                                  |
| Logged Time by Customer                   | The average time, in minutes, it has taken to resolve RFCs for each Customer.                                  |
| Mean Open Time by Item Type               | Against each Item Type, the average time in hours, RFCs have been open.  |
| Mean Open Time by Priority                | Against each Priority, the average time in hours, RFCs have been open.   |

| Change Request Reports      | Description  |
|-----------------------------|--|
| Mean Open Time by Team      | Against each Team, the average time in hours, RFCs have been open.       |
| Mean Open Time by Customer  | Against each Customer, the average time in hours, RFCs have been open.   |
| Mean Open Time by Org. Unit | Against each Org. Units, the average time in hours, RFCs have been open. |

**NOTE:** Change Time: RFC Time Reports are based on the Logged Time calculated for a Change Request. Logged Time is the amount of time in minutes a Change Request has been worked on by Technicians.

## 2.10.6 Service Agreement Reports

The Service Agreements tab allows the User to generate reports for Service Level Agreements, Operational Level Agreements and Service Provider Contracts across all or a specifically selected Process.

Each Service Agreement report displays data based on Service Targets and Actual Times. The information is displayed as follows:

| Report Attributes       |  |
|-------------------------|--|
| Response Time           | Actual Response time recorded.             |
| Agreement Response Time | Target Response Time.                      |
| Restore Time            | Actual Restoration time recorded.          |
| Agreement Restore       | Target Restoration Time.                   |
| Fix Time                | Actual Resolution time recorded.           |
| Agreement Fix           | Target Resolution Time.                    |
| Breached                | States if the Agreement has been breached. |

For details on some of these attributes, read the [Targets](#) section in [Service Level Agreements \(SLAs\)](#).

The reports available within the Service Agreements tab include:

| Service Agreement Reports     |  |
|-------------------------------|--|
| Request SLA Times by Customer | Derived by selecting a Customer, lists each of their requests, SLA target and actual times.            |
| SLA Times by Request          | Lists SLA targets and actual times for each request with a Service Level Agreement.                    |
| Request SLA Times by Org Unit | Derived by selecting an Organizational Unit, lists each of their requests SLA target and actual times. |

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## Service Agreement Reports

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|  |   |
|--|---|
| Request SLA Times by Priority                        | For each Priority, displays a list of request SLA targets and actual times.   |
| Request SLA Times by SLA                             | For each Service Level, displays a list of target and actual times for requests assigned that SLA.  |
| Request Times by Service Provider                    | Derived by selecting a Service Provider, displays a summary of all Underpinning Contracts fulfilled.  |
| Request Times by Underpinning Contract               | Derived by selecting an Underpinning Contract, displays each request covered by the underpinning contract with expected, actual and breached times recorded against Response, Restoration and Resolution times. |
| Request Times by OLA                                 | Derived by selecting an OLA, displays each request covered by the OLA with expected, actual and breached times recorded against Response, Restoration and Resolution times.                                     |
| Mean Request SLA Times by Customer                   | Derived by selecting a Customer, displays a list of the average SLA target and actual times against each SLA and request Priority.  |
| Mean Request SLA Times by Org Unit                   | Derived by selecting an Organizational Unit, displays a list of the average SLA target and actual times against each SLA and request Priority.  |
| Mean Request SLA Times by SLA                        | Displays the average SLA times for each SLA and request Priority.   |
| Mean Request Contract Times by Underpinning Contract | Derived by selecting an Underpinning Contract, details the calculated average Response, Restore and Resolution time for each State assigned the Underpinning Contract.  |
| Mean Request Contract Times by OLA                   | Derived by selecting an OLA, details the calculated average Response, Restore and Resolution time for each State assigned the OLA.  |
| Mean Request Contract Times by Service Provider      | Derived by selecting a Service Provider, details the calculated average Response, Restore and Resolution time for the Vendor's Contract.  |
| Total Request Time by Customer                       | Derived by selecting a Customer, displays the total amount of time spent by Technicians working on their requests.  |
| Request Achievement by SLA                           | Derived by selecting a Service Level, displays the request total that met the SLA times compared to the Incident total that was unsuccessful.   |
| Request Achievement Per Technician                   | Technician achievement rates with the percentage achieved, is reported against a selected SLA.  |

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## Service Agreement Reports

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|  |   |
|--|---|
| Request Achievement Per Customer                   | Achievement rates with the percentage achieved displayed across Customer, as reported against all or a selected SLA.  |
| Request Achievement Per Org. Unit                  | SLA achievement rates with the percentage achieved across Org. Units, as reported against all or a selected SLA.  |
| Reason for SLA Breaches                            | Derived by selecting a Service Level, displays the request total with an SLA breach explanation.<br><br>(Breach reasons are based on the Breach Codes created under the Service Level > Breach Code tab.)     |
| Breached Request Information                       | Lists each request with an SLA breach, including the point where the breach occurred (Response/Restoration/Resolution) and if an explanation was provided.  |
| Breached Request Information by Team               | For a selected Team, the report lists each request with a SLA breach, including the point where the breach occurred (Response/Restoration/Resolution) and if an explanation was provided.                     |
| Active Contracts by Service Provider (Summary)     | Derived by selecting a Service Provider, displays a summary of underpinning contracts currently being fulfilled.  |
| Active Contracts by Service Provider (Detailed)    | Derived by selecting a Service Provider, lists each current request covered by an underpinning contract with expected, actual and breached times recorded against Response, Restoration and Resolution times. |
| Active Contracts by Service Manager (Summary)      | Derived by selecting a Service Manager, displays a summary of underpinning contracts currently being fulfilled.   |
| Active Contracts by Service Manager (Detailed)     | Derived by selecting a Service Manager, lists each current request covered by an underpinning contract with expected, actual and breached times recorded against Response, Restoration and Resolution times.  |
| Breached Underpinning Contracts by Resolution Time | Lists each breached Underpinning Contract based on Resolution Time.   |
| Breached OLA Contracts by Resolution Time          | Lists each breached OLA based on Resolution Time.   |
| Item Availability                                  | Based on the defined Item Category and Minimum Criticality, the percentage Uptime of all Items for each Item Type is reported against the SLA uptime and also displays if breaches have been recorded.        |
| Maintenance Contract by Expiration Date            | Displays a list of Contracts with contact name, start and end dates for the time period entered.  |

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## 2.10.7 Configuration Reports

Configuration Report options include:

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### Configuration Item Reports

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|                                  |   |
|----------------------------------|---|
| Request Count by Item Type       | The total requests created against each Item Type.  |
| Items by Customer                | Lists Items owned by defined Customer.  |
| Items by Item Category           | The total number of Items created for each Item Category.   |
| Items by Item Status             | Derived from an Item Category, the total Items assigned to each Status.   |
| Items by Item Type               | The total number of Items created for each Item Type.   |
| Items by Manufacturer            | The total number of Items against each Manufacturer.  |
| Item by Service Level Expiration | Lists the number of Items covered by an SLA Contract over the remaining expiration period (Expiration period cover in month: Expired, <1, 1- 3, 3-6, 6-12, 12> in months).  |
| Item by Warranty Expiration      | Lists the number of Items covered by a warranty over the remaining expiration period (Expiration period cover in month: Expired, <1, 1- 3, 3-6, 6-12, 12> in months).   |
| Items Pending Audit              | Lists all Items based on their last audit date.( An Item's Audit Date can be set under Configuration > Select an Item > Costs.)   |
| Services by SLA Performance      | For a selected Service Item over a specified timeframe, the report shows the Target Availability Time compared to the Actual Uptime, number of SLA Response, Restoration and Resolution Breaches recorded and the total number of requests logged against the Item. |
| Top 10 Items by Time             | The top 10 time consuming Items with the total time spent on their Incidents.   |
| Value by Category                | The value for each Item Category, in dollars. The value is calculated by adding the amount entered in the Cost field for each Item per Category.  |

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## 2.10.8 Organization Reports

The following Organization Reports can be generated across requests for each Process:



| <b>Organization Reports</b>           | <b>Description</b>   |
|---------------------------------------|--|
| Requests by Org Unit                  | For each Org Unit the total requests created.  |
| Requests by Org Unit, by Country      | Refined by selecting a Country, shows the total number of requests created by each Org Unit.   |
| Open Requests by Org Unit             | For each Org Unit the total of open requests.  |
| Request Priority by Org Unit          | Derived by selecting an Org Unit, displays each Priority with the total of requests raised against it.   |
| Open Request Priority by Org Unit     | Derived by selecting an Org Unit, displays each priority with the total of open requests.  |
| Request Status by Org Unit            | Derived from Workflow and selecting an Org Unit, displays the total of requests for each Status.   |
| Request Time by Org Unit              | For each Org Unit the total of requests created and total time spent by Technicians.   |
| Requests by Item Room Location        | For each Room the total of requests created.   |
| Open Requests by Item Room Location   | For each Room the total of Open requests.  |
| Request Rooms by Org Unit             | Derived from selecting an Org unit, lists the total of requests created from each Room.  |
| Request Item Category by Organization | For a selected Org Unit, the report displays the number of requests logged against each Item Category.   |
| Request Item Type by Organization     | For a selected Org Unit, the report displays the number of requests logged against each Item Type.   |
| Mean Request Cost by Org Unit         | Based on the time spent on a request and a Technician's salary, the average cost (\$) to manage a particular Org Unit's Requests.  |
| Items by Org Unit                     | Lists the total of Items owned by each Org Unit.   |
| Total Cost by Org Unit                | Derived by selecting an Org Unit, displays the total cost and time to resolve the Org Unit's requests.   |
| Service Cost by Org. Unit             | For each Org. Unit, shows the cost of providing a Service, which is calculated nightly and saved, along with the revenue figures, in the ITEM_REVENUE table.<br><br>The cost of the Service includes all the cost factors and saves a figure each night, per service, per cost centre. This is the sum of these for a Service. |

| <b>Organization Reports</b>       | <b>Description</b>  |
|-----------------------------------|---|
| Service Revenue by Org. Unit      | <p>For each Org. Unit, shows the price charged for providing a Service that is calculated nightly and saved, along with the cost figures in the ITEM_REVENUE table.</p> <p>The price charge for the Service is determined in the cost calculator configured in the Service Item Type.</p>   |
| Total Service Cost by Org. Unit   | <p>For each Org. Unit, shows the cost of providing a Service that is calculated nightly and saved, along with the revenue figures, in the ITEM_REVENUE table.</p> <p>The cost of a Service includes all the cost factors and saves a figure each night, per service, per cost centre. This is the sum of these across all Services.</p> |
| Total Service Revenue by Org Unit | <p>For each Org. Unit, shows the price charged for providing all Services that is calculated nightly and saved, along with the cost figures in the ITEM_REVENUE table.</p> <p>The price charge for the Service is determined in the cost calculator configured in the Service Item Types associated with all Services.</p>              |

## 2.10.9 Technician Reports

Technician Reports include the following:

| <b>Technician Reports</b>   | <b>Description</b>  |
|-----------------------------|---|
| Open Requests by Technician | Displays a list of Technicians and total of open requests assigned to them.   |
| Open/Resolved by Technician | The report includes the number of requests created, open and resolved on by Technicians.  |
| Mean Logged Time (Closed)   | The average time to close requests for Technicians.   |
| Mean Logged Time            | In hours, the total time a Technician has left requests open.   |
| Priority by Technician      | For each Priority (Urgent/High/Medium/Low), the total of requests assigned to each Technician.  |
| Logged Time by Technician   | For each Technician the total time logged in minutes, the average time based on the number of Notes created, is displayed for the defined timeframe.                    |
| Team Requests by Technician | For the selected Team, each Technician the total time logged in minutes, the average time based on the number of Notes created, is displayed for the defined timeframe. |

| <b>Technician Reports</b>                     | <b>Description</b>   |
|---|--|
| Service Request Status by Technician (Active) | Based on a selected Service Request Workflow, lists each Technician and the total of RFCs assigned to each Status. |
| Service Request Status by Technician (Closed) | Based on a selected Service Request Workflow, lists each Technician and the total of RFCs assigned to each Status. |
| Incident Status by Technician (Active)        | Based on the Incident Workflow, lists each Technician and the total of Incidents assigned to each Status.          |
| Incident Status by Technician (Closed)        | Based on the Incident Workflow, lists each Technician and the total of Incidents assigned to each Status.          |
| Problem Status by Technician (Active)         | Based on the Problem Workflow, lists each Technician and the total of Problems assigned to each Status.            |
| Problem Status by Technician (Closed)         | Based on the Problem Workflow, lists each Technician and the total of Problems assigned to each Status.            |
| Change Request Status by Technician (Active)  | Based on a selected Change Request Workflow, lists each Technician and the total of RFCs assigned to each Status.  |
| Change Request Status by Technician (Closed)  | Based on a selected Change Request Workflow, lists each Technician and the total of RFCs assigned to each Status.  |
| Mean Request Open Time by Technician          | For a selected Request Type, the average open time for each Technician is displayed.                               |
| Incidents Logged by Technician                | Displays the total of Incidents created by each Technician.  |
| Last Login by Technician                      | List each Technician and their last login date.  |

## 2.10.10 Knowledge Reports

To maintain the quality and usefulness of the Knowledge Base content, the following reports can be generated for the Classifications of all Configuration Categories and Types:

| <b>Knowledge Reports</b>     | <b>Description</b>  |
|------------------------------|---|
| Articles by Category         | Displays the number of Articles created for each Classification as defined by the Item Category.  |
| Articles by Item Type        | Based on a selected Item Type, displays the number of Articles created for each Classification at the Item Category or Item Type level. |
| Articles Quality by Category | Shows the average rating for Articles against each Classification as defined by the Item Category.                                      |

| <b>Knowledge Reports</b>          | <b>Description</b>   |
|-----------------------------------|--|
| Articles Quality Item Type        | Based on a selected Item Type, shows the average rating for Articles against each Classification at the Item Category or Item Type level.                    |
| Articles Views by Category        | Shows the number of times Articles have been viewed against each Classification as defined by the Item Category.   |
| Articles Views by Item Type       | Based on a selected Item Type, shows the number of times Articles have been viewed against each Classification at the Item Category or Item Type level.      |
| Unused Article Count by Category  | Shows the number of Articles that have not been accessed against each Classification as defined by the Item Category.  |
| Unused Article Count by Item Type | Based on a selected Item Type, shows the number of Articles that have not been accessed against each Classification at the Item Category or Item Type level. |
| Unused Articles by Category       | Shows the details of Articles that have not been accessed against each Classification as defined by the Item Category.                                       |
| Unused Articles by Item Type      | Based on a selected Item Type, shows the details of Articles that have not been accessed against each Classification.  |

## 2.10.11 Financial Reports

The following Financial reports can be generated:

| <b>Finance Reports</b> | <b>Description</b>   |
|------------------------|--|
| Cost by Team           | The average cost per Team and the time in minutes, to resolve requests.  |
| Cost by Item Type      | The average cost per Item Type and the time in minutes, to resolve requests.   |
| Cost by Service Level  | The average cost by SLA and the time in minutes, to resolve requests.  |
| Cost by Technician     | The average cost per Technician and the time in minutes, to resolve requests.  |
| Service Cost           | <p>The cost of providing a Service is calculated nightly and saved, along with the revenue figures, in the ITEM_REVENUE table.</p> <p>The cost of the Service includes all the cost factors and saves a figure each night, per service, per cost centre. This is the sum of these for a Service.</p> |

| <b>Finance Reports</b>               | <b>Description</b>   |
|--------------------------------------|--|
| Service Revenue                      | <p>The price charged for providing a Service is calculated nightly and saved, along with the cost figures in the ITEM_REVENUE table.</p> <p>The price charge for the Service is determined in the cost calculator configured in the Service Item Type.</p>   |
| Total Service Cost                   | <p>The cost of providing a Service is calculated nightly and saved, along with the revenue figures, in the ITEM_REVENUE table.</p> <p>The cost of a Service includes all the cost factors and saves a figure each night, per service, per cost centre. This is the sum of these across all Services.</p> |
| Total Service Revenue                | <p>The price charged for providing all Services is calculated nightly and saved, along with the cost figures in the ITEM_REVENUE table.</p> <p>The price charge for the Service is determined in the cost calculator configured in the Service Item Types associated with all Services.</p>              |
| Service Consumption                  | <p>Uses the total number of consumers of a service as recorded in the ITEM_REVENUE table, which is broken down by cost centre,</p> <p>to illustrate how the number of consumers of a service varies over time.</p>   |
| Request Fulfilment Cost by Org. Unit | Total cost of Purchase Orders used to fulfil the Service Requests for an Org. Unit   |
| Request Fulfilment Costs             | Total cost of Purchase Orders used to fulfil Service Requests within the system.   |

Some of these costs are calculated by averaging the salaries of all Technicians entered in the system. If a Technician's salary has not been entered, the application will assign the Technician a default salary of \$35,000 per year.

## 2.10.12 Report Builder

The internal system report builder is designed as a mid-range report writing tool and does not replace report writing tools. It is intended to provide Users with the capability to build simple custom reports without requiring in-depth knowledge of the database schema.

Reports can be built across:

- ◆ All request types
- ◆ Teams and Technicians
- ◆ Items
- ◆ Organizational Units and Customers

- ◆ Knowledge Base Articles

Service level management including SLAs, OLAs and UCs.

Working with the Report Builder, Users visually construct a query that can be run against the database through the relevant Reports sub-menu tabs. Within the query the User defines the various components of a query:

*From* - the objects forming the basis of the query for the report (The User selects the table or tables to query.)

*Select* - the fields of the relevant objects to be used for the report and if appropriate, how this information is to be expressed or manipulated based on functions for performing calculations (A statement that is used to select data from a database.)


*Where* - applies conditions to the data for inclusion in the report (Filters records to be used in the report. Extracts records that meet specific criteria)

*Having* - a special type of 'where' expression that applies to calculated fields rather than individual fields

*Grouped* - how this information is collated for presentation. (The User defines how a single value is calculated from multiple values in a column e.g., average, count, sum.)

The various elements of a report definition are detailed in the following table:

| Report Builder | Description  |
|----------------|--|
| Details        |  |
| Name           | Enter a name that represents the data being presented by the report.   |
| Location       | Define the report list where the report will be stored within the Reports tab for generation.<br><br>For example, if Incident is selected, the custom report will be found in the Incident Request Reports within the Reports>Requests>Process screen. Within this screen it is displayed with an * and can be generated, edited and duplicated. |
| Sharing        | Select the Users who can access the report.<br><br>Role : Tick the User Role groups for the custom report to be included within these Users Reports tab .<br><br>Team: Select Team if the report is to be shared across members of a defined Team.   |
| From           |  |

| Report Builder  | Description   |
|-----------------|---|
| Entities        | <p>The content of the Available Entities field initially displays a Base Entity list. Upon moving one selection to the Selected Entities field, the Available Entities list is filtered to displays entities directly related to the entry added to the Selected Entity field.</p> <p>For example when building a report against Incidents, assign the Incident Entity first, and the Available Entity list will show data fields related to Incidents only, such as Request Team, Request Priority or Request Classification, etc.</p> |
| Select<br>Field | <p>Database options displayed here are derived from the Selected Entities Field. Within the first drop down list, select the database table to be used, and within the second drop down list select the column of information that is to be used for the report.</p>  |
| Function        | <p>If the information selected in the second drop down list of the Select field can be presented based on an applied condition, the Function field is displayed.</p> <p>For example, the Entity Request Priority can be expressed using a count, average, maximum, minimum or total.</p> <p>Define the condition to be applied to the Selected field and click  to add to the Select sidebar.</p>  |
| Display Name    | <p>Enter the Name for the field, as it is to be displayed in the report.</p>  |
| Where           | <p>For the details of a parameter are to be defined at the point a report is generated, select the Runtime option. For example, Technician Name.</p>  |
| Field           | <p>Database options displayed here are derived from the Selected Entities Field. Within the first drop down list, select the database table to be used, and within the second drop down list select the column of information that is to be used for the report.</p>  |

| <b>Report Builder</b> | <b>Description</b>   |
|-----------------------|--|
| Expression            | <p>This field defines how the information contained in the database table is to be treated when included in the report. For information that has no function, simply select if the defined parameter is to be true or false, for including in the report. For example, Archived or Deleted - true or false.</p> <p>If the information selected in the second drop down list of the Where field can be presented differently based on an applied condition, the Comparison list is displayed.</p> |
| Having                |  |
| Field                 | Drop down options displayed here are derived from the Selected objects that use a function.  |
| Expression            | <p>Having clauses are used to specify thresholds in queries.</p> <p>For example, a report that only returns Org Unit names that have an average fix time greater than an hour. (SELECT AVERAGE(INCIDENT.FIX_TIME), ORG_UNIT_ID FROM INCIDENT WHERE DELETED != 1 HAVING AVERAGE(INCIDENT.FIX_TIME) &gt; 60 GROUP BY ORG_UNIT_ID ORDER BY xO_0_)</p>   |
| Grouped By            |  |
| Field                 | <p>The displayed list is derived from the options included in the Select list for data that do not use functions.</p> <p>This defines the clauses used to group the data.</p>  |
| Order By              |  |
| Fields                | Select one or more expressions for sorting the data.   |
| Chart                 |  |
| Include Chart         | This option is available if the data selected for the report can be displayed in chart format.   |
| X-Axis                | Drawn from the Grouped By field.   |
| y-Axis                | Drawn from the Having field.   |
| Query                 |  |
| Select, From, Where   | Displays the query built by what has been defined in the Select, From, Where and Group By fields   |

Reports can be built that extend those included in the product to meet specific organizational needs, and a clear report objective is required before commencing the process of building a report.



## Example 1: Service Requests by Country

For example the service organization may want to report on which countries are generating the bulk of the Service Requests logged with the service desk. To build the report, the following steps are required:

1. Select the Reports > Builder tab
2. Enter the Details

This report will be named Total Service Requests by Country, and will be located under Requests > Service Request within the reports, shared with other Supervisors.

**Details**

Name |

Location | Request  Incident

Sharing |  Role  Team

Supervisor  Technician  
 Manager  Finance

3. In the From field, define which database tables/entities are required for the report

In order to build the report a base object is needed which in this case is the Service Request entity. The Request Customer Country entity is also required, but to access this, the Request Customer entity must be added first.

**From**

Entities | Available Entities | Selected Entities

Change Request  
Change Request Team  
Client  
Deployment Task  
Incident  
Incident Team

None selected

4. Based on the entities added within the From field, complete the Select and, if relevant, Function information

A count of requests by country is desired, so for the Select Field, select Service Request and ID, and set the objective (Function) is to count the request ID's. Click the **+** button to add this selection.

**Select**

Function | Count

Field | Service Request  . ID

This will provide the counts but in addition to this we need to see the names of the respective countries in the result, so once again within the Select Field, select Request Customer Country and then Name. Click the **+** button to add this selection.

**Select**

Field Request Customer Col . Name

5. Within the Where field, define how the information is to be treated for inclusion in the report  
This report should exclude records that are archived or deleted, so select those fields of the service request, setting the expression to False. Click the **+** button to add terms.

**Where**

Runtime Parameter

Field Service Request . Deleted

Expression  True  False **+**

6. Further refine the data requirements for inclusion in the report by completing the Having fields  
Since the Select option uses a Function, the Having selection is available. As the report is looking for high volume countries, it is possible to exclude countries with less than 5 results using the Greater or Equal to expression.

**Having**

Field Count(Service Request)

Expression Greater or Equal to 5 **+**

7. Within the Grouped By field, set how the data is to be presented  
The counts need to be collated by country, so add the Request Customer Country.Name option in the Group By field.

**Grouped By**

Fields  Request Customer Country.Name

8. Further refine how the data should be sorted for presentation using the Order By field  
For this report the key metric is the count, so this report should be sorted by the count, in descending order with the highest values appearing at the top of the report.

**Order By**

Fields Count(Service Request) Descending **+**

9. If a chart is to be included in the report, set the Chart field  
Inclusion of a chart showing the results can aid the presentation of result data, in this case the X-Axis will contain the country names, and the Y-Axis will represent the counts.

**Chart**

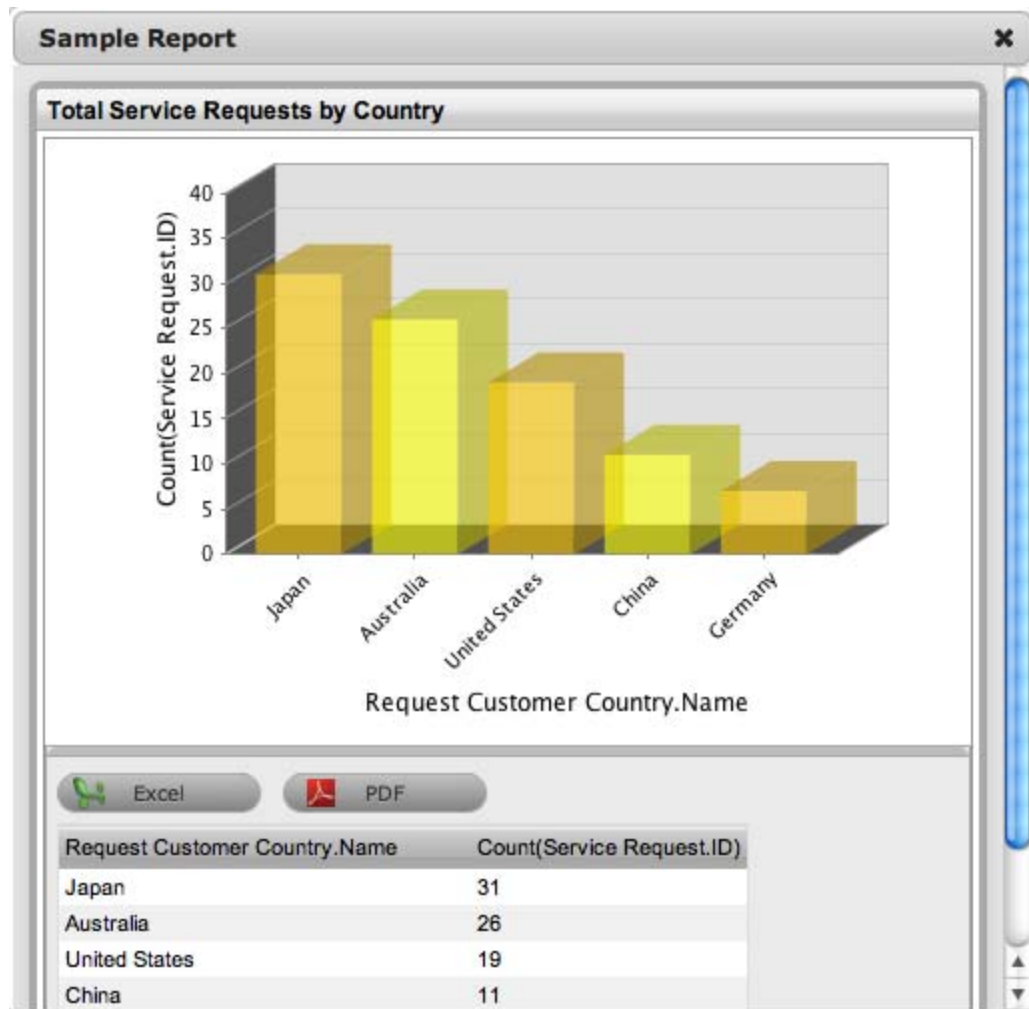
Include Chart

X-Axis Request Customer Col

Y-Axis Count(Service Request)

10. Click Test to generate a sample report or Save to record the report

The report definition is complete and a sample can be generated using the test button. Alternatively, it can now be saved, which will make it accessible in the Location specified when building the report.



11. Fine tune the report, if relevant, by adding Runtime Parameters

The sample report generated thus far is a good base but would benefit from some fine tuning, as it currently reports against all Service Requests ever logged. The desired data is more than likely to be measured over a specified time frame. This can be achieved by adding some runtime parameters to the Where clause for the Service Request entity.

**Where**

Runtime Parameter

Field: Service Request . Open Date

Expression: After

Working within the saved report, click Edit with the report selected and the report builder is opened, with the current definition in place.

**Where**

Runtime Parameter

Field: Service Request . Open Date

Expression: Before

Adding the above fields will allow start and end dates to be specified when the report is accessed.

12. Click Save

The report generation page now includes the newly added date fields.

**Service Request Reports**

Process: Service Request Reports

Report Type: Open Service Requests by Priority

Start Date (mm/dd/yy): 12/20/15

End Date (mm/dd/yy): 01/19/16

Trend:

Create

13. Access the report in the saved location.

Navigate to the Service Request filter of the Reports>Requests screen to access the Total Service Requests by Country report. The custom report will be prefixed with an asterisk for identification. It can be accessed and executed by the owner and other Supervisors per the defined sharing options.

**Service Request Reports**

Process: Service Request Reports

Report Type: \*Total Service Requests by Country

Create Edit Duplicate

## Example 2: Item Purchases by Item Category

For example the service organization may need to know what Items are purchased by Category within a specific timeframe. To build the report, the following steps are required:

1. Select the Reports > Builder tab
2. Enter the Details

This report will be named 'Item Purchases by Item Category', and it will be saved under Reports > Configuration and shared with other Supervisor and Finance Users.

- In the From field, define which database tables/entities are required for the report  
In order to build the report a base object is needed which in this case is the 'Item' entity. The Item Category is required, but to access it, the Item Type entity must be added first.

- Based on the entities added within the From field, complete the Select and, if relevant, Function information

A count by Item Category is desired, so for the Select option, the objective is to count the Item ID's. Click the **+** button to add this selection.

This will provide the counts but in addition to this we need to see the names of the Categories in the result, ideally along with the Category ID's for grouping. Click the **+** button to add this selection.

- Within the Where field, define how the information is to be treated for inclusion in the report

This report should exclude records that are archived or deleted, so select those fields of the service request, setting the expression to False. Click the **+** button to add terms.

**Where**

Runtime Parameter

Field  .

Expression  True  False **+**

This report will be run on a monthly basis, so it requires a date range to be defined at runtime by the user running the report. Click the **+** button to add the Before and After as Runtime Parameters.

**Where**

Runtime Parameter

Field  .

Expression  **+**

**Where**

Runtime Parameter

Field  .

Expression  **+**

(This report will not contain a Having clause as all the results are to be shown.)

6. Within the Grouped By field, set how the data is to be presented

The counts need to be collated by Item Category, so in the Group By field 'Item Category.ID' should be added. Click the **+** button to add this selection.

**Grouped By**

Fields  **+**

7. Further refine how the data should be sorted for presentation using the Order By field

This report is going to be ordered by category name to expedite any required checks that may be needed later. Click the **+** button to add this selection.

**Order By**

Fields   **+**

8. If a chart is to be included in the report, set the Chart field

Inclusion of a chart showing the results can aid the presentation of result data, in this case the X-Axis will contain the Category names, and the Y-Axis will represent the counts.

| Chart                               |                      |
|-------------------------------------|----------------------|
| <input checked="" type="checkbox"/> | Include Chart        |
| X-Axis                              | Item Category.Name   |
| Y-Axis                              | Count(Item.Item Num) |

9. Click Test to generate a sample report or Save to record the report

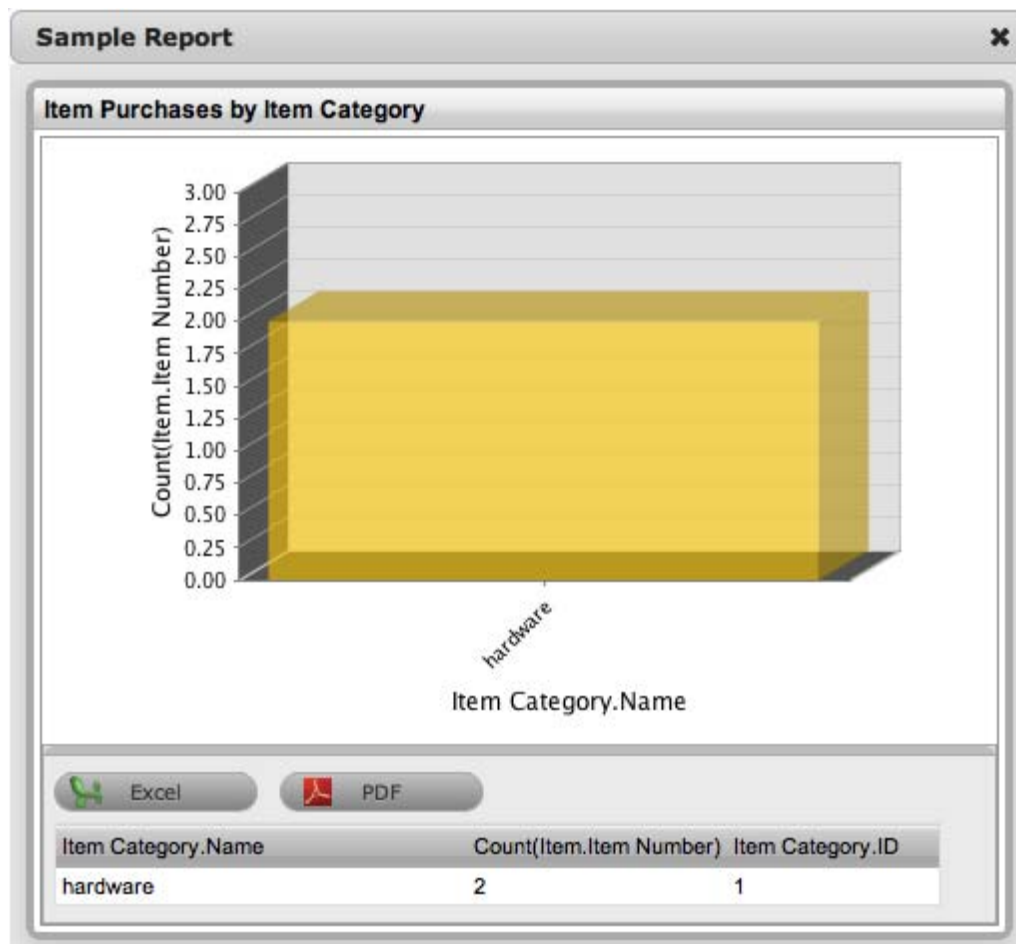
The report definition is complete and it can now be saved (which makes it accessible in the specified location), alternatively a sample can be generated using the Test button, which prompts for the required fields.

### Sample Report

#### Parameters

|                    |                      |  |
|--------------------|----------------------|--|
| Item.Audit Date <= | <input type="text"/> |  |
| Item.field10 <>    | <input type="text"/> |  |

**Create**



10. Access the report in the saved location.

Navigate to the Reports>Configuration screen to access the Item Purchases by Item Category report.

The custom report will be prefixed with an asterisk for identification. It can be accessed and executed by the owner and other Supervisor or Finance Users per the defined sharing options.

## 2.10.13 Login Report

The information displayed on the Login Report screen includes:

- ◆ Recent Logins with IP addresses, host details and login dates for Users who recently accessed the system
- ◆ Alert Manager Statistics showing active Alerts in the system  
Alerts can be created manually by Users and automatically by the system to notify Users about service and support activities.
- ◆ Current sessions, with an End Session option at the bottom of the screen.

---

**NOTE:** Administrator Users can click on Logout to end a User's session. This may be required if a User has disconnected from the system without logging out and needs access to log back in. This option is not required if the Terminate Active Session option is set to Yes in the Setup>Privileges>System tab.

---



## 2.10.14 System Reports

System reports are a real time summary of the system status and environment.

Report information includes:

- ♦ Statistics including a summary of key system metrics regarding the current session, the hosting environment and memory usage
- ♦ Overall application and database statistics
- ♦ Tasks lists all background system jobs including Indexing, which allows the Supervisor to view that the system is indexing correctly without sticking
- ♦ Information about the Java Virtual Machine running on the server.

## 2.11 Finance

- ♦ [Section 2.11.1, “Financial Management,” on page 893](#)
- ♦ [Section 2.11.2, “Financial Management Applied,” on page 894](#)
- ♦ [Section 2.11.3, “Invoices,” on page 905](#)
- ♦ [Section 2.11.4, “Purchase Orders,” on page 918](#)

### 2.11.1 Financial Management

Financial Management quantifies, in financial terms, the value of IT services for the business and IT department. This includes measuring the value of the underpinning infrastructure that provides the services and qualifying operational forecasts. Applying a services approach to IT, financial management helps identify, document and agree on the value of services being provisioned by IT, and provides service demand modeling and management.

With a goal to ensure funding for the delivery and consumption of services, Financial Management focuses on the demand and supply requirements based on business strategy, capacity inputs and forecasting use. As a transitional role between an organization's corporate finances and service management, Financial Management calculates and assigns a monetary value to a Service and service components to allow costs to be spread across the organization.

The monetary value is derived by calculating the operating and capital costs, which include the investments made in hardware and software license costs, annual maintenance fees for hardware and software and personnel resources used to support and maintain the services, across the number of Users.

Tightly integrated throughout the application, Financial Management derives hierarchical costs from within the CMDB and considers Org Units as Cost Centers, while extending functionality built into the Service Item costs calculator. Used as a forecasting tool, it provides the service organization with information about pricing a service, by detailing the contributing cost factors and applying concepts such as cost splitting across services that leverage common infrastructure. Stored in the CMDB, the central repository, organizations can generate their own reports and all data is broken down by cost center, ready to be reassembled in real time for the User interface to assist with business planning and the budgeting processes.

Financial Management is not a standalone process in this service management application, but a component of [Service Portfolio Management](#) and the [Service Catalog](#), with direct access being found within the [Service Item Costs](#) tab of any Service Category Item.

To access this functionality, Users must be assigned the Finance Role, in the Information tab of their User information screen. For detailed information about using Financial Management, refer to [Financial Management Applied](#).

## 2.11.2 Financial Management Applied

- ◆ [“Enable Financial Management Access” on page 895](#)
- ◆ [“Enable Functionality” on page 895](#)
- ◆ [“Charging for Service” on page 896](#)
- ◆ [“Forecast Service Costs” on page 898](#)
- ◆ [“Calculate Actual Service Costs” on page 900](#)
- ◆ [“Inherited Costs” on page 903](#)
- ◆ [“Finance Reports” on page 904](#)

Financial Management can be used to forecast the costs for offering a Service and can also calculate the amount that should be charged to the Service Users in order to recover costs.

To use Financial Management as a tool for calculating the financial value of the underpinning infrastructure that provisions services and to qualify operational forecasts, you need to:

- ◆ Provide the User access to the functionality
- ◆ Enable SLA costing functionality
- ◆ Enable the functionality within the Category
- ◆ Create the Item Type and enter forecast figures
- ◆ Create the Service Item, which automatically applies the forecast figures
- ◆ Build the relationships between the Service and underpinning hardware and software, to associate actual costs
- ◆ Use Finance Reports to compare forecast costs with actual costs, and chargeback costs to the Org. Unit Users.

---

**NOTE:** To complete the following outlined process, a User must have Supervisor and Administrator access.

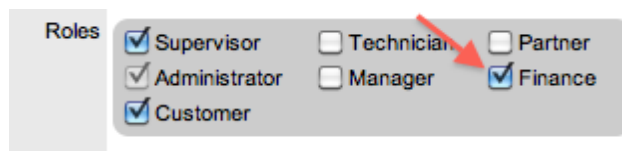
---

## Enable Financial Management Access

To access the Financial Management functionality a User must be assigned the Finance Role within the Information tab of their User Information screen. Assigning the Role within a system synchronized with an authentication server, the system administrator needs to include the User in the Finance group in LDAP.

To switch on the functionality for an existing User in a system not synched with an LDAP server, as a Supervisor:

1. Select the User > Users tab
2. Click on the Name hyperlink of the relevant User
3. Select Edit
4. Tick the Finance box in the Roles field



5. Click Save.

The User can now access the Finance Management functionality within the consolidated User view.

## Enable Functionality

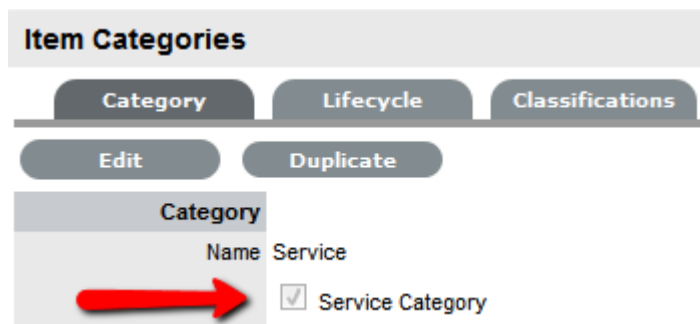
Financial information can only be calculated for Service Items that are created using a Category, which has the Service Category option enabled. By enabling this option, the Costs Tab is made available with the Item Type where baseline figures can be recorded.

As a User with the Finance Role:

1. Move to the Configuration > Categories tab
2. Click the Service Item Category hyperlink



3. Verify the Service Category option is checked



4. Click Done.

## Charging for Service

If the service and support organization is to charge Organizational Units, that is companies or departments, for the ongoing service they provide the costing functionality for the Service Level Agreements (SLAs) needs to be enabled, and the Prices for the different Agreements need to be assigned to each of the SLAs.

As a User with Administrator access, within the Setup screen:

1. Select Setup > Billing
2. Click Yes for the Display SLA Prices option

**Billing**


**Setup**

**Billing Module**


Enable Purchase Orders  Yes  No

Enable Contracts  Yes  No

Enable Invoices  Yes  No

Display SLA Prices  Yes  No 

**Global Settings**

Currency  

**Save**

3. Click Save

The Annual, Request and Hourly Price fields are now made available within an SLA Editor screen.

4. Switch to the User Portal to access the Supervisor view

5. Move to the Service > SLAs tab

6. Select the Name hyperlink for an SLA

The SLA Editor is now displayed.

7. Click Edit

8. Enter the relevant figure in the Annual Price field

The Annual Price entered should be the per User, per year price for the SLA.

**SLA Editor**

**Details** **Targets** **Blackouts** **Workflows**

**Duplicate**


**Details**

Name

On Breach  cc Team Leader

Pause on Holiday

Customer Timezone

**Internal Costs** 

Annual Cost

Request Cost

Hourly Cost

**Customer Prices**

9. Click Save and Done.

Repeat the process for all relevant SLAs configured in the system. For detailed information about configuring SLAs see [Creating SLAs](#).

## Forecast Service Costs

When proposing a Service as part of Service Portfolio Management, the investment and ongoing costs for offering a Service can be calculated. This information can then be used to project potential revenue for offering the Service and allow consumers of the Service to be charged for accessing the Service based on User access. For an example, we will use the Service Desk Service, considering the investment in hardware and software plus the ongoing SLA expense for offering the Service, when forecasting costs.

To forecast the cost of offering a Service, as a Financial User:

1. Move to the Configuration > Types tab
2. Select the default Service Desk Item Type  
If creating a new Item Type refer to [Creating Item Types](#).
3. Click Edit
4. Search and select the relevant SLAs for the Supported Levels field  
This is where SLAs that have Prices are associated with them.

The screenshot shows the 'Service Level' configuration interface. It includes a 'Default Level' dropdown menu and a 'Supported Levels' section with a selected SLA of '\$1,500.00 p.a.'. Below this is a search box labeled 'Find SLA (Name)' with a search icon and a list of results: 'Platinum', 'SLA', and 'Warranty'. A status bar at the bottom of the search results indicates '1 - 3 of 3 Results'.

5. Move to the Costs Tab  
The Capital, Recovery and Recurring cost fields are now displayed.
6. Complete the following fields:

| 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 number of years designated to recover the costs of implementing the Service.   |

---

**Costs**

---

|              |  |
|--------------|--|
| Recurring    | Enter the ongoing cost, on a per calendar month basis, for offering the Service. For example, annual support and maintenance agreement costs charged on a monthly basis.   |
| 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 <a href="#">Service Item Costs tab</a> to calculate the ongoing Revenue figures.</p> <p><b>NOTE:</b> 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 the 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.  |

---

7. Enter a figure in the Forecast Users field for each SLA

(The displayed SLAs are based on the ones assigned to the Supported Levels field in the Information tab.)

If multiple SLAs are assigned to the Item Type and Forecast Users are assigned to each SLA, the Costs are divided by the total number of Forecast Users as calculated across the SLAs to arrive at the B.E.P. The system does not differentiate between who the Users are, it only accounts for the number of Users

8. Enter the Price for the Service to recover costs in a per calendar month

Use the calculated Break Even Point (B.E.P.) to set the Price. This figure is then used as a comparison figure for the Actual cost in the Service Item Costs Tab.

**Type Information**

Information | Classifications | Items | Requests | **Costs** | Fields | Responses

**Service Desk**

| Forecast Costs |              | Actual Costs |           |
|----------------|--------------|--------------|-----------|
| Capital        | 18000.00     | Capital      | \$0.00    |
| Recovery       | 5 years      | Recurring    | 0.0 p.c.m |
| Recurring      | 250.00 p.c.m |              |           |

| Services |             |               |                |         |               |  |
|----------|-------------|---------------|----------------|---------|---------------|--|
| SLA      | Cost (p.a.) | Current Users | Forecast Users | B.E.P.  | Price (p.c.m) |  |
| Bronze   | \$300.00    | 1             | 70             | \$30.50 | 32.00         |  |
| Gold     | \$400.00    | 1             | 10             | \$38.83 | 40.00         |  |
| Silver   | \$350.00    | 1             | 20             | \$34.67 | 36.00         |  |

Delete | Cancel | Save

9. Click Save and Done.

The forecasted Price per User is now available within the Charges Price field on the Costs tab of the Service Item.

**Item Information**

Information | Details | **Costs** | Requests | Relationships

Edit | Duplicate | Print

**Item # 100002 (Service Desk)**

| Financial             |        | SLA Details   |                        |
|-----------------------|--------|---------------|------------------------|
| Cost                  | \$0.00 | Service Level | Silver ← Supported SLA |
| 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) | \$36.00 p.c.m (\$1.20 daily) | Avg Repair Time  | N/A |
| Cost (per user)  | \$81.77 p.c.m (\$2.73 daily) | Avg Time To Fail | N/A |

Forecast price per month per User for providing the Service. Estimation is based on 100 Users and the supported SLA

Actual cost per month per User based on 19 assigned Users and costs delegated from related Items.

## Calculate Actual Service Costs

To calculate the actual Service Costs, the relationships of the infrastructure Items that underpin the Service need to be mapped within the Relationships tab. Working with these relationships, it should be noted that the Service is considered a Child Item within the hierarchy.

To build the relationship map refer to the [Relationships Tab](#).

After the underpinning infrastructure and its associated costs are related to the Service Item, the following financial information is available in the Service Item Costs tab:



| 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><b>NOTE:</b> Typically for Service Items, the infrastructure costs would be zero as this would be derived from the associated Parent Items.</p> |
| 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.   |
| Usage Unit Cost   | 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.   |
| 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.   |
| Charges           |  |
| Price (per user)  | Draws the figure from the <a href="#">Service Item Type Costs tab</a> 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.  |

| Financial         | Description  |
|-------------------|--|
| 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.   |
| 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> Allows for the % cost to be assigned within the relationship. To do this, within the Service Item Relationships tab, all Items within the defined relationship map must have the same setting and then the Cost Split % can be set within the table included on the Relationships tab by clicking on the 0.00 link. Note, if a N/A link is visible within the Cost Split % column, then that Item does not have the Custom % option selected.</p> |
| Availability      |  |
| Avg Repair Time   | Entries displayed here are automatically calculated based on the average length of time an Item is offline.  |

**Financial**

**Description**

Avg Time To Fail

Figures displayed here are automatically calculated based on the average time between an Item being moved to an offline State.

### Inherited Costs

Charging Organizational Units appropriately for a Service can be based on figures derived from the Items associated with the Service. For example, the Service Desk is hosted on a server and uses service management software. The costs associated with the server and software are combined to make the Inherited Capital cost, while any ongoing support contracts would be assigned as an Inherited Ongoing cost on a per month basis.

**Item Information**

Information Details Costs Requests Relationships Outages AMIE Snapshots

Edit Print Item # Jason-Iphone6 (Iphone 6)

Available  
Item # Wifi Service  
Average Uptime: N/A  
Average Response Time: N/A  
Service Level: Warranty  
Last Updated: 01/07/16 15:00

Jason-Iphone6 (Iphone 6) is a child of Wifi Service (WIFI Service)

Loaded

Direction: Child - Parent      Display: 10

| Current Item | Relationship  | Related Item | Item #       | Identifier | Category     |
|--------------|---------------|--------------|--------------|------------|--------------|
| Iphone 6     | is a child of | Iphone 6     | 1000010      |            | BYOD Devices |
| Iphone 6     | is a child of | WIFI Service | Wifi Service |            | BYOD Devices |

To derive the amounts from the related infrastructure and populate the fields within the Child Item, the Delegate Costs field must be enabled within the Inherited Costs for the Parent Items and the technique for deriving the cost must be assigned to the CI.

**Item Information**

Information Details **Costs** Requests Relationships

Duplicate Print Item # 100003 (Oracle 11g)

**Financial**

Cost 10000.00

Monthly Cost 166.00

Purchase Date 06/14/11 17:58

Depreciate Over years

Depreciated Value \$0.00

Audit Date (mm/dd/yy)

PO Number

**Inherited Costs**

Inherited Capital \$20,000.00

Inherited Ongoing \$333.33

Delegate Costs  Yes  No

Strategy User Count

**SLA Details**

Service Level Silver

**Availability**

Avg Repair Time N/A

Avg Time To Fail N/A

Delete Cancel Save

In the Service Desk example, for the server hosting the Service Desk Service it would be appropriate to delegate costs applying the Child Count technique as multiple software/service CIs may be associated with the server. While, the User Count would be used to delegate costs to the service management software.

**Charges**

Price (per user) \$36.00 p.c.m (\$1.20 daily)

Cost (per user) \$81.77 p.c.m (\$2.73 daily)

**Revenue**

Month to Date N/A

Previous Month N/A

**Costs**

Month to Date N/A

Previous Month N/A

**Inherited Costs**

Inherited Capital \$30,000.00

Inherited Ongoing \$499.33

Delegate Costs  Yes  No

**Item Information**

Information Details **Costs** Requests Relationships

Edit Duplicate Print Item # 100003 (Oracle 11g)

**Financial**

Cost \$10,000.00

Monthly Cost \$166.00

Purchase Date 06/14/10 17:58

Depreciate Over 3 years

Depreciated Value \$6,666.67

**SLA Details**

Service Level Silver

**Availability**

Avg Repair Time N/A

**Item Information**

Information Details **Costs** Requests Relationships

Edit Duplicate Print Item # 100004 (Service Manager)

**Financial**

Cost \$20,000.00

Monthly Cost \$333.33

**SLA Details**

Service Level

After the relationships have been defined for the Service and the Inherited Costs applied, the Finance User can verify the forecast numbers by comparing the Inherited Costs within the Item>Costs tab, to the Capital and Recurring Costs recorded in the Item Types Costs tab. Any disparity between the figures should alert the Finance User as to whether the Service is within budget and if relevant, making or costing money.

## Finance Reports

The Finance User can access the following Reports within the Reports>Finance tab, to assist with verifying the cost and revenue generated by a Service, and monitoring how a Service is used.

| Finance Reports       | Description  |
|-----------------------|--|
| Service Cost          | <p>The cost of providing a Service is calculated nightly and saved, along with the revenue figures, in the ITEM_REVENUE table.</p> <p>The cost of the Service includes all the cost factors and saves a figure each night, per service, per cost centre. This is the sum of these for a Service.</p>     |
| Service Revenue       | <p>The price charged for providing a Service is calculated nightly and saved, along with the cost figures in the ITEM_REVENUE table.</p> <p>The price charge for the Service is determined in the cost calculator configured in the Service Item Type.</p>   |
| Total Service Cost    | <p>The cost of providing a Service is calculated nightly and saved, along with the revenue figures, in the ITEM_REVENUE table.</p> <p>The cost of a Service includes all the cost factors and saves a figure each night, per service, per cost centre. This is the sum of these across all Services.</p> |
| Total Service Revenue | <p>The price charged for providing all Services is calculated nightly and saved, along with the cost figures in the ITEM_REVENUE table.</p> <p>The price charge for the Service is determined in the cost calculator configured in the Service Item Types associated with all Services.</p>              |
| Service Consumption   | <p>Uses the total number of consumers of a service as recorded in the ITEM_REVENUE table, which is broken down by cost centre,</p> <p>to illustrate how the number of consumers of a service varies over time.</p>   |

### 2.11.3 Invoices

- ◆ “Creating Invoices” on page 906
- ◆ “Invoice Summary” on page 914
- ◆ “Invoice Payment & Delivery” on page 917
- ◆ “Contracts” on page 918



The Invoices sub-menu option is available within the Finance tab when the option has been enabled by the system administrator. Invoices allows support organizations to charge Customers for support services provided, and manage Items purchased with Service Contracts.

(For more information about enabling Billing, see: Setup>Billing within the Administrator Guide.)

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 by the system through the following screens:

- ♦ Within the Invoices section
- ♦ When an Incident 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 following sections are covered within Invoices:

- ♦ [Invoice creation](#) - creating an invoice for a Service Contract or an Item with a Service Contract
- ♦ [Invoice summary screen](#) - Summary tabs, emailing and editing an Invoice, and information about an Invoice Status
- ♦ [Invoice payment and delivery](#) - processing an Invoice when payment is required.

## Creating Invoices

- ♦ [“Creating an Invoice to purchase an Item and Service Contract” on page 906](#)
- ♦ [“Creating an Invoice to Purchase a Service Contract” on page 911](#)

Invoices can be created for Items and associated service Contracts, and for Items or Service Contracts only.

### Creating an Invoice to purchase an Item and Service Contract

To create an Invoice:

1. Select Finance>Invoices
2. Click New

The Customer tab appears.

3. To assign a Customer to the Invoice:

- a. Search for a Customer who already exists in the system

Enter any known information such as their First Name, Last Name, Email Address, Org. Unit or Username in the Find Customer fields. To view a list of all Customers in the database, leave all the fields blank.

**Invoice Editor**

Customer Items Contract Summary

**Contact**

- Name
- Email
- Phone
- Fax
- Pager
- Mobile
- Org. Unit
- Address 1
- Address 2
- City
- State
- Zip
- Country

**Find Customer**

First Name Email


Last Name Phone

Username Org. Unit


Supported Org. Units Only

Delivery Details  Use Customer Details

Cancel Next

- b. Click 
  - c. Click on a Customer's name to assign them to the Invoice
 

The Delivery Details are automatically extracted from the Customer Details. If they are not the same, uncheck by clicking the tick in the Use Customer Details box and enter the correct details.
  - d. Select Next to continue.
 

The system moves to the Items tab.
4. To add an Item Type for an Item Order:
- a. Select  if the Invoice is to purchase a new Item
 

Otherwise, click Next to purchase a Service Contract.
  - b. Search for the Item Type to be associated with the Invoice
 

Leave the search field blank and click the Search button to display a list of Item Types that can be assigned to the Invoice

- c. Select the relevant Item Type link to add it to the Invoice

**Invoice Editor**

Customer Items Contract Summary

Item Type | Iphone 6  
 Unit Price | \$0.00  
 Actual Price | 0.00  
 Units | 1  
 Taxable |

Cancel Save

| Item Type          | Item # | Unit Price | Actual Price | Units | Taxable | Total Price |
|--------------------|--------|------------|--------------|-------|---------|-------------|
| 0 - 0 of 0 Results |        |            |              |       |         |             |

- a. Enter the Actual Price information, if relevant and the number of Units to be ordered
- b. Mark the order as Taxable if required  
 The tax is not included in the Actual Price but will be calculated within the Invoice Summary tab.
- c. Click Save to add

The Item Type details are applied to the Invoice

**Invoice Editor**

Customer Items Contract Summary

| Item Type | Item # | Unit Price | Actual Price | Units | Taxable                             | Total Price |
|-----------|--------|------------|--------------|-------|-------------------------------------|-------------|
| Iphone 6  | TBA    | \$0.00     | \$0.00       | 1     | <input checked="" type="checkbox"/> | \$0.00      |

1 - 1 of 1 Results

Delete Add Cancel Next

- d. To add more Item Types, select **Add** and repeat the above process.  
 Alternatively, click Next to move to the Contract tab, if required.
5. To add a Service Contract for a newly ordered Item Type:
  - a. Select **Add** to add a Service Contract to the Invoice  
 Or, click Next to go to the Invoice summary.
  - b. Select the appropriate SLA from the drop-down options
  - c. Select the Item Type related to the Service Contract  
 To search for an Item Type enter any known details in the Find Item Type search field.
  - d. Click the Item Type link to assign it to the Invoice



**Invoice Editor**

Customer Items Contract Summary

SLA Warranty

Item Type Iphone 6

SLA Price \$0.00 per Annum

Actual 0.00

Units 1

Taxable

Time Subscription

Start Date 01/07/16 12:34

End Date 01/07/17 23:59

Cancel Save

| SLA                | Item Type | Item # | Contract # | Unit Price | Actual | Units | Hours | Taxable | Total |
|--------------------|-----------|--------|------------|------------|--------|-------|-------|---------|-------|
| 0 - 0 of 0 Results |           |        |            |            |        |       |       |         |       |

- e. Amend the Actual Price, if relevant
- f. Check the Contract as taxable, if relevant
- g. Select the Time period covered by the Contract:

*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.

- h. Click Save.

- 6. To add another contract to the Invoice, click **Add** and repeat the above process.

**Invoice Editor**

Customer Items Contract Summary

| SLA  | Item Type | Item # | Contract # | Unit Price | Actual | Units | Hours | Taxable                             | Total  |
|--|-----------|--------|------------|------------|--------|-------|-------|-------------------------------------|--------|
| <input checked="" type="checkbox"/> Warranty | Iphone 6  | TBA    | TBA        | \$0.00     | \$0.00 | 1     | N/A   | <input checked="" type="checkbox"/> | \$0.00 |

1 - 1 of 1 Results

Delete Add Cancel Next

7. Click Next to move onto the Summary page

### Invoice Editor

Customer
Items
Contract
Summary

Invoice # 100034

**Customer Details**

Name James Stewart  
 Org. Unit Micro Focus - Information Technology  
 Address 1  
 Address 2  
 City  
 State  
 Zip  
 Country

**Order Details**

PO Number   
 Order Date   
 Invoice Date   
 Due Date   
 Entered By Kamal K  
 Processed By

**Details**

Custom 1   
 Custom 2   
 Custom 3

**Line Items**

| Items           | Item Type | Actual Price | Units | Taxable | Total Price |
|-----------------|-----------|--------------|-------|---------|-------------|
|                 | Iphone 6  | \$0.00       | 1     |         | \$0.00      |
| <b>Subtotal</b> |           |              |       |         | \$0.00      |

| Contracts | SLA      | Item Type | Actual Price | Units | Taxable | Total Price |
|-----------|----------|-----------|--------------|-------|---------|-------------|
|           | Warranty | Iphone 6  | \$0.00       | 1     | N/A     | \$0.00      |

1 - 1 of 1 Results

Apply Terms

Notes

**Delivery Details**

First Name James  
 Last Name Stewart  
 Address 1  
 Address 2  
 City  
 State  
 Zip  
 Country

**Status**

Invoice Status Pending  
 Delivery Status Undelivered  
 Payment Status Pending Unpaid  
 Payment Date  
 Shipping Date   
 Tracking Number

**Costs**

Line Items Total \$0.00  
 Shipping   
 Tax \$0.00 (@ 13.00 %)  
 Adjustment   
**Total**

Cancel
Save

8. Enter a PO Number and make any other adjustments, if relevant

9. Click Save

10. Select **Email** to send the Invoice to the Customer, if required
11. Click Done.

## Creating an Invoice to Purchase a Service Contract

To create a Service Contract Invoice:

1. Select Finance>Invoices
2. Click New


The Customer tab appears.

3. To assign a Customer to the Invoice:

- a. To search for a Customer who already exists in the system

Enter any known information such as their First Name, Last Name, Email Address, Org. Unit or Username in the Find Customer fields. To view a list of all Customers in the database, leave all the fields blank.


The screenshot shows the 'Invoice Editor' interface with the 'Customer' tab selected. On the left, there is a 'Contact' list with fields: Name, Email, Phone, Fax, Pager, Mobile, Org. Unit, Address 1, Address 2, City, State, Zip, and Country. Below this is a 'Delivery Details' section with a checked box for 'Use Customer Details'. On the right, the 'Find Customer' search panel includes input fields for First Name, Email, Last Name, Phone, Username, and Org. Unit. There is a checked box for 'Supported Org. Units Only' and a search icon. At the bottom right, there are 'Cancel' and 'Next' buttons.

- b. Click 
- c. Click on a Customer's name to assign them to the Invoice

The Delivery Details are automatically extracted from the Customer Details. If they are not the same, uncheck by clicking the tick in the Use Customer Details box and enter the correct details.

- d. Select Next

The system moves to the Items tab and displays the following message




### Information

---

Select Add to add an Item or Next to create a contract

- e. Click Next again
- The system moves to the Contract tab.



### Information

---

Select Add to create a contract

- 4. To create a Service Contract:
  - a. Select **Add** to create the Service Contract
  - b. Select the appropriate SLA from the drop-down options

#### Invoice Editor

Customer
Items
Contract
Summary

SLA  
 Contract Type  
 SLA Price  
 Actual  
 Taxable  
 Time  
 Start Date  
 End Date

Warranty
Contract Type...

Cancel
Save

| SLA                | Contract Type | Name | Contract # | Unit Price | Actual | Units | Hours | Taxable | Total |
|--------------------|---------------|------|------------|------------|--------|-------|-------|---------|-------|
| 0 - 0 of 0 Results |               |      |            |            |        |       |       |         |       |

- c. Select the Contract Type

| Contract Type     | Description  |
|-------------------|--|
| Item Contract     | To purchase a contract for an Item. Search and select an Item using the Find Item search.                        |
| Customer Contract | To purchase a contract for a Customer. Search and select a Customer using the Find Customer search.              |
| Org Unit Contract | To purchase a contract for an Organizational Unit. Search and select an Org Unit using the Find Org Unit search. |

- d. Amend the Actual Price, if relevant
- e. Check the Contract as taxable, if relevant
- f. Select the Time period covered by the Contract:

If *Subscription* is selected, the Start and End Dates are automatically completed by the system.

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.

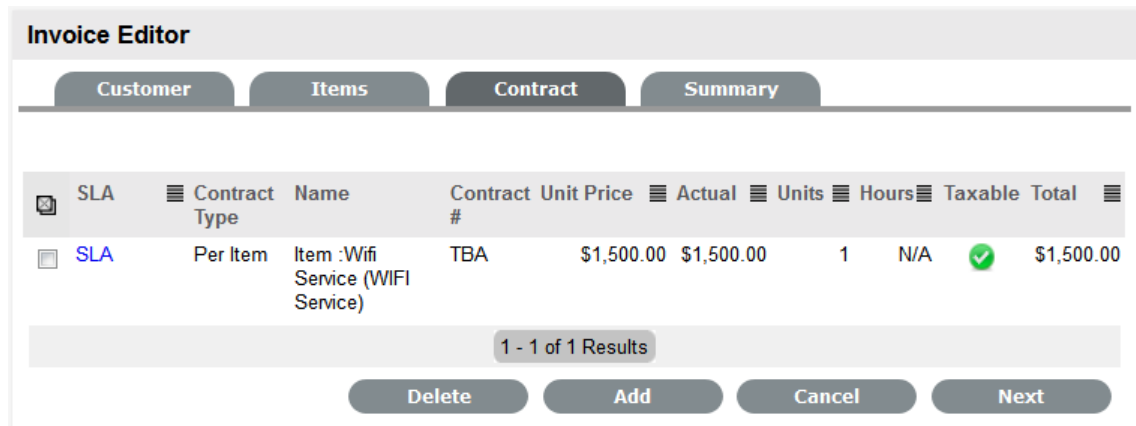
If *Support Hours* is selected, the number of support hours purchased by the Customers should be entered.

If *Support Hours by Month* is selected, a contract that covers a total number of support hours purchased for a defined timeframe and allocated on a per month basis.

(If a Contract is forward dated with a Start Date set in the future, the Pending Contract status is assigned. See [Pending Contracts.](#))

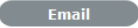
- g. Click Save

- 5. To add another contract to the Invoice, click  and repeat the above process.



The screenshot shows the 'Invoice Editor' interface with four tabs: Customer, Items, Contract, and Summary. The 'Contract' tab is active. Below the tabs is a table with the following columns: SLA, Contract Type, Name, Contract #, Unit Price, Actual, Units, Hours, Taxable, and Total. A single row is displayed with the following values: SLA, Per Item, Item :Wifi Service (WIFI Service), TBA, \$1,500.00, \$1,500.00, 1, N/A, a green checkmark, and \$1,500.00. Below the table, it says '1 - 1 of 1 Results'. At the bottom, there are four buttons: Delete, Add, Cancel, and Next.

- 6. Click Next to move onto the Summary page
- 7. Make any adjustments, as required

8. Click Save
9. Select  to send the Invoice to the Customer, if required
10. Click Done.

## Invoice Summary

- ♦ [“Emailing an Invoice” on page 916](#)
- ♦ [“Invoice Status” on page 917](#)
- ♦ [“Editing an Invoice” on page 917](#)

The Invoice Summary tab includes the invoiced Customer, delivery and order details. It allows Users to email the Invoice to relevant parties and displays the status of the Invoice. The summary screen also allows Finance Users to process an Invoice when payment is received.

The following fields are included with the Invoice Summary tab:

| Fields          | Description   |
|-----------------|---|
| PO Number       | Auto-generated or manually entered order identification number.   |
| Order Date      | Auto-generated or manually adjusted order date.   |
| Invoice Date    | Auto-generated or manually adjusted date for the invoice creation.  |
| Due Date        | The date the invoice is due. Auto-generated based on the Default Invoice Due value defined by the Administrator.                            |
| Entered By      | The User who created the invoice.   |
| Processed By    | The User who processed the invoice.   |
| Invoice Status  | Displays what stage of the order process the invoice is in.   |
| Delivery Status | Details the status of delivery for items on the invoice   |
| Payment Status  | Details if the invoice has been paid  |
| Payment Date    | Date the invoice was processed for payment.   |
| Shipping Date   | Manually entered date of shipping.  |
| Tracking Number | Reference number manually entered to track the order.   |
| Apply Terms     | For the system terms and conditions to be included in the PDF Invoice and the Invoice emailed to the Customer, tick the Apply Terms option. |
| Notes           | Enter any additional Invoice information within the Notes field.  |

| Fields                        | Description  |
|-------------------------------|--|
| Shipping, Discounts and Taxes | Before saving an Invoice, any shipping costs to be included in the grand Invoice total can be entered in the Shipping field. |
| Adjustment                    | The Adjustment field records Customer discounts and will be subtracted from the final order total.                           |

**NOTE:** A flat tax percentage can be added to taxable line Items included on the Invoice. This is a global property that is configured by the system Administrator, in Setup>Billing>Tax Rate, but can be edited if required.

**Invoice Editor**

Customer    Items    Contract    Summary

Edit    PDF    Invoice # 100035

**Customer Details**

Name James Stewart

Org. Unit Micro Focus - Information Technology

Address 1

Address 2

City

State

Zip

Country

**Order Details**

PO Number 12

Order Date 01/07/16 12:39

Invoice Date 01/07/16 12:39

Due Date 01/19/16 00:00

Entered By Kamal K

Processed By

**Details**

Custom 1

Custom 2 1

Custom 3

**Line Items**

Contracts

| SLA | Contract Type | Name                              | Actual Price | Units | Hours | Taxable                             | Total Price |
|-----|---------------|-----------------------------------|--------------|-------|-------|-------------------------------------|-------------|
| SLA | Per Item      | Item :Wifi Service (WIFI Service) | \$1,500.00   | 1     | N/A   | <input checked="" type="checkbox"/> | \$1,500.00  |

1 - 1 of 1 Results

Apply Terms

Notes

**Delivery Details**

First Name James

Last Name Stewart

Address 1

Address 2

City

State

Zip

Country

**Status**

Invoice Status Pending

Delivery Status Undelivered [Process](#)

Payment Status Pending Unpaid

Payment Date

Shipping Date 01/07/16 12:39

Tracking Number

**Summary**

Subtotal \$1,500.00

**Costs**

Line Items Total \$1,500.00

Shipping \$0.00

Tax (@ 13.00%) \$195.00

Adjustment \$0.00

**Total \$1,695.00**

Email    Done

## Emailing an Invoice

Once an invoice is created, selecting the Email button will send a copy of the Invoice to:

- ♦ The Customer who placed the order
- ♦ The system Finance User



- ♦ The User who recorded the Invoice
- ♦ The Customer who will take delivery, if different to the person who placed the order.

If the system Administrator has enabled the Email Invoice functionality in the application Setup, the Invoice will be emailed automatically to the relevant parties when it is created.

## Invoice Status

When an Invoice is first logged in the system it has a status of Pending. A pending Invoice can be edited. However, when an Invoice has been successfully delivered or processed, the Invoice Status moves to Active and it is no longer editable.

| Status          |                                     |
|-----------------|-------------------------------------|
| Invoice Status  | Pending                             |
| Delivery Status | Undelivered <a href="#">Process</a> |
| Payment Status  | Pending Unpaid                      |
| Payment Date    |                                     |
| Shipping Date   | 01/07/16 12:39                      |

An Invoice changes to a status of Cancelled when one of the following events occurs:

- ♦ Another Invoice is created to supersede the original Invoice; or
- ♦ The Invoice was created for a specific Incident and that Incident was deleted/cancelled either manually or due to the Incident Cancel Time, set by the system Administrator, being exceeded. See Setup>Billing within the Administrator Guide.

## Editing an Invoice

To amend Invoice details or to include additional Line Items, edit or enter the information prior to selecting the Process hyperlink. This link is not available when the Invoice is in Edit mode, as all Invoice information must be locked down to ensure the application has control of the details of the Items and their delivery.

## Invoice Payment & Delivery

- ♦ [“Processing an Invoice when Payment is Required” on page 918](#)
- ♦ [“Processing an Invoice when Payment is not Required” on page 918](#)

Relative to the workings of your support organization, Item and/or Support Contract Invoices may or may not need to be paid before an Item can be delivered to your Customer or Support Contract used by your Customer.

To update the Shipping Date, open the Invoice in Edit mode when the Delivery Status is Undelivered and enter the relevant date within the Shipping Date field.

## Processing an Invoice when Payment is Required

For organizations where the option of Payment Required is enabled by the Administrator, a User with Finance access is the only User who can update the Payment Status of an Invoice. To update the Payment Status, the Finance User selects the Payment Received hyperlink of an Invoice to change the status to Paid. Once payment has been made, any other User, such as a Supervisor, can process the Invoice.

| Status          |   |
|-----------------|---|
| Invoice Status  | Pending   |
| Delivery Status | Undelivered <a href="#">Process</a>             |
| Payment Status  | Pending Unpaid <a href="#">Payment Received</a> |
| Payment Date    |   |

## Processing an Invoice when Payment is not Required

If the Payment Required option has not been enabled by the system Administrator, a Line Item can be activated in the support system by selecting the Delivery Status Process hyperlink. This means that Customer payment does not need to be received by the organization before the Customer Item is delivered or a support contract is activated in the system.

When the Process hyperlink is clicked, the Invoice Status is updated to Active, and the Delivery Status changes to Delivered. (If the invoice is related to a support contract, the request status is moved from Pending - No Contract to the Workflow default open State, such as Pending.)

| Status          |   |
|-----------------|---|
| Invoice Status  | Active  |
| Delivery Status | Delivered                                       |
| Payment Status  | Pending Unpaid <a href="#">Payment Received</a> |
| Payment Date    |   |
| Shipping Date   | 07/29/10 14:01                                  |

## Contracts

- ◆ Contracts & Invoices
- ◆ Create a Contract
- ◆ Time Recorded

### 2.11.4 Purchase Orders

- ◆ [“Adding Line Items” on page 921](#)
- ◆ [“Editing Existing Line Items” on page 922](#)
- ◆ [“Removing a Line Item” on page 923](#)
- ◆ [“Converting a Purchase Order to an Item Number” on page 924](#)
- ◆ [“Searching Purchase Orders” on page 925](#)

Purchase Orders within the system 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 Purchase Order system, it is designed to easily link a specific PO number (and its associated vendor and date information) with an Item.

Select the Purchase Order sub-menu button under the Finance tab to display the list of current Purchase Orders in the system and the Purchase Order search tool.


To create a new Purchase Order:

1. Select Finance>Purchase Orders
2. Click New

The Purchase Order editor appears.


3. Enter the following details for the Purchase Order:

| Field         | Description  |
|---------------|--|
| Order Details |  |
| PO Number*    | The Identification number assigned to the Purchase Order (Must be unique). |
| Order Date*   | The date the Purchase Order was entered.                                   |

| Field            | Description   |
|------------------|---|
| Invoice Date*    | <p>The date the vendor shipped the Item. This information</p> <p>is used to help calculate warranty / lease expiration date.</p>  |
| Vendor*          | <p>The distributor or vendor of the item. Select from the drop-down menu, or create a new entry using the  button (at minimum for a new entry, the Vendor name is required).</p> |
| Order Type*      | <p>Purchase or Lease. Use the icon to switch between Types. If Lease is selected, Lease Length must be defined.</p>   |
| Originator Name* | <p>The Customer who placed the order. Use the last name to lookup the Customer, select the name to assign.</p>  |
| Deliver To       | <p>The Customer to take delivery and ownership of the new Item. Use the last name to look-up the Customer. If a Customer is not selected, it will remain as the Originator.</p>   |
| Notes            | <p>Additional information regarding the Purchase Order.</p>   |


\* Denote Mandatory Fields

1. Click Save to enter the Purchase Order into the database.

 **Information**  
You may now add line items.


---


**Purchase Orders Editor**

 Print



**Order Details**


PO Number

Order Date  

Invoice Date  

Date Format mm/dd/yy

Vendor   

Order Type  Purchase

Custom 1

Custom 2

Originator

Deliver To

PO Status Not Delivered

Notes

Freight  
Amount Applied

**Line Items**

| Item Type          | ID # | Part Number | Quantity | Unit Price | Delivered Status | Item Number |
|--------------------|------|-------------|----------|------------|------------------|-------------|
| 0 Line Items Total |      |             |          |            |                  | \$0.00      |

## Adding Line Items

Once a Purchase Order is saved to the database, the Line Item editor becomes available at the bottom of the Purchase Order form. Line Items define the Item Type, and contain part number and price information options.

To add a new Line Item:

1. In the Line Item field, click New

**Line Items**

| Item Type          | ID # | Part Number | Quantity | Unit Price | Delivered Status | Item Number |
|--------------------|------|-------------|----------|------------|------------------|-------------|
| 0 Line Items Total |      |             |          |            |                  | \$0.00      |

2. Search and select the Item Type

The screenshot shows a sidebar labeled 'Line Items' and a main form titled 'Item Type'. The form has a search bar with the text 'Find Item Type (Name)' and a magnifying glass icon. Below the search bar are three input fields: 'Part Number', 'Unit Price', and 'Quantity' (which contains the number '1'). At the bottom right of the form are two buttons: 'Cancel' and 'Save'.

3. Complete the Part Number (if known)

4. Enter the Price

5. Enter the Quantity

6. Click Save

| Line Items         | Item Type | ID # | Part Number | Quantity | Unit Price | Delivered Status        | Item Number |   |
|--------------------|-----------|------|-------------|----------|------------|-------------------------|-------------|---|
|                    | Iphone    | 1    |             | 1        | \$100.00   | Not Delivered - Confirm | TBA         | ⊖ |
| 1 Line Items Total |           |      |             |          |            |                         | \$100.00    |   |

7. To add more line items to the PO, click New and repeat steps 2 to 6

Remove any unwanted line items by selecting ⊖ within the relevant line.

8. Click Save

The Purchase Order is moved out of edit mode.

9. Click Done.

---

**NOTE:** Purchase Orders and Invoices are not automatically linked within the system. However, Invoices can be created for Purchase Orders. See: [Invoices](#).

---

## Editing Existing Line Items

To edit an existing PO:

1. Select Finance>Purchase Orders

2. Click the PO Number link

3. Click Edit

4. Move to the Line Items field and click the relevant Item Type link

The screen expands the Line Item editor.

Line Items | Item Type | lphone

Find Item Type (Name)

Part Number

Unit Price | 656.00

Quantity | 1

Cancel Save

5. Make the required changes
6. Click the Save button, within the Line Items field.

## Removing a Line Item

To remove a Line Item from an existing Purchase Order:

1. Select Finance>Purchase Orders
2. Click the PO Number link
3. Click Edit

The Minus and New buttons are displayed in the Line Item field.

| Line Items         | Item Type | ID # | Part Number | Quantity | Unit Price | Delivered Status        | Item Number |   |
|--------------------|-----------|------|-------------|----------|------------|-------------------------|-------------|---|
|                    | lphone    | 1    |             | 1        | \$100.00   | Not Delivered - Confirm | TBA         | ⊖ |
| 1 Line Items Total |           |      |             |          |            |                         | \$100.00    |   |

4. Move to the Line Items field and next to the relevant Item Type click ⊖
5. The system will confirm that the User wishes to continue

Really delete this line item?

Prevent this page from creating additional dialogs

OK Cancel

6. Click OK
7. Click Save.

## Converting a Purchase Order to an Item Number

A Purchase Order can be associated with an Item Number after its delivery has been recorded.

To confirm delivery:

1. Select Finance>Purchase Orders>Order number Hyperlink
2. On the Purchase Order Number link, click Edit

The Purchase Order opens in edit mode. Item information can be edited by selecting the Item Type link before Delivery has been processed.

**Purchase Orders Editor**

Print

**Order Details**

PO Number 100002

Order Date 01/19/16 12:26

Invoice Date 01/19/16 12:26

Date Format mm/dd/yy

Vendor NewVS

Order Type Purchase

Custom 1

Custom 2

Originator Andy Fair-andy@epm.blr.novell.com

Deliver To Andy Fair-andy@epm.blr.novell.com

PO Status Not Delivered - [Confirm Delivery](#)

Click to confirm delivery. This will allow the Line Item to convert into an item in the CMDB

3. Click the Confirm Delivery hyperlink  
The system will ask to confirm delivery.
4. Click OK within the system message  
The Generate Items For Delivered Line Items link appears.

Order Type Purchase

Originator Andy Fair-andy@epm.blr.novell.com

Deliver To Andy Fair-andy@epm.blr.novell.com

PO Status Delivered - [Generate Items For Delivered Line Items](#)

Click the generate item Number in CMDB

5. Click the link to generate an Item number  
This will generate a new Item for each line item of the PO.

| Line Items         | Item Type | ID # | Part Number | Quantity | Unit Price | Delivered Status | Item Number |
|--------------------|-----------|------|-------------|----------|------------|------------------|-------------|
|                    | lphone    | 1    |             | 1        | \$100.00   | Delivered        | 100029      |
| 1 Line Items Total |           |      |             |          |            |                  | \$100.00    |

6. Click Save  
The application will return to the Purchase Order screen.
7. Click Done.



## Searching Purchase Orders

Existing Purchase Orders can be searched using the PO number, order date, invoice date, the person who placed the order, the person to be allocated the Item or the Vendor.

To search for a specific PO:

1. Select Finance>Purchase Orders
2. Click Search

The Search Purchase Orders screen is displayed.

The screenshot shows a web form titled "Search Purchase Orders". The form has a light gray header with the title. Below the header, there are several input fields and dropdown menus. The fields are: "PO Number" (text input), "Order Date" (text input with a dropdown arrow and a calendar icon), "Invoice Date" (text input with a dropdown arrow and a calendar icon), "Date Format" (text input with the value "mm/dd/yy"), "Originator Last Name" (text input), "Deliver To Last Name" (text input), "Vendor" (text input with a dropdown arrow), "Order Type" (text input with a dropdown arrow), "Custom 1" (text input), and "Custom 2" (text input). At the bottom of the form, there are three buttons: "Cancel", "Clear", and "Search".

3. Enter the search details
4. Click Search

The results are displayed in a Purchase Order list. Use the column header arrows to sort the PO list.

5. Click the PO Number link to view or edit PO details.

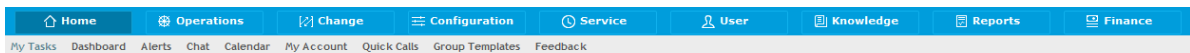


# 3 Technician/Partner Guide

- ◆ Section 3.1, “Home,” on page 927
- ◆ Section 3.2, “Operations,” on page 930
- ◆ Section 3.3, “Change,” on page 937
- ◆ Section 3.4, “Configuration,” on page 939
- ◆ Section 3.5, “Service,” on page 960
- ◆ Section 3.6, “User,” on page 971
- ◆ Section 3.7, “Knowledge,” on page 972
- ◆ Section 3.8, “Reports,” on page 972

## 3.1 Home

- ◆ Section 3.1.1, “Dashboard as default Home Tab,” on page 928
- ◆ Section 3.1.2, “Partner Role,” on page 928
- ◆ Section 3.1.3, “Calendar,” on page 930



When a Technician or Partner User logs into the system, it defaults to the Home tab, unless the Default Home setting has been adjusted within the My Accounts screen to Dashboard. This allows the User to instantly access requests that have been allocated to them and that are currently active. All tabs displayed across the service management processes depend on the Processes assigned to the Technician within the system.

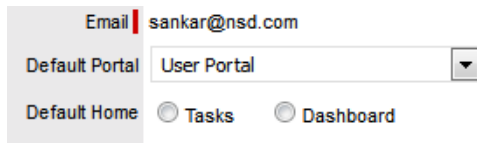
Personal Account information can be accessed and modified through the Home tab. Service Desk metrics are displayed graphically within the Dashboard option.

The Home tab gives access to the following tabs:

- ◆ [My Tasks](#) - Provides the User with a list of their active requests
- ◆ [Alerts](#) - With the option enabled, Users can create system Alerts
- ◆ [Chat](#)- Allows the User to view and accept Customers' chat requests (Visible when the option is enabled for the system.)
- ◆ [Calendar](#)- Displays an event calendar for requests and their due dates
- ◆ [My Account](#) - Allows the User to edit their personal information, including password resets and set their time zone
- ◆ [Dashboard](#) - The Dashboard can be configured to provide the User with the real time data on their requests' status
- ◆ [Feedback](#) - Allows the User to access published Surveys that are ready for their completion.

### 3.1.1 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 following fields:

- Email: sankar@nsd.com
- Default Portal: User Portal (dropdown menu)
- Default Home:  Tasks  Dashboard

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

### 3.1.2 Partner Role

A Partner is similar to a Technician as they have the same privileges, but can only view and manage their own Customers, Customer Items and Customer requests. Users with Partner system access are associated with Partner Organizations, which allows for multiple Partner Users to be available to service Customer requests. See: [Partner Organizations](#).

---

**NOTE:** When a request is created for a Partner's Customer it is automatically allocated to the Partner.

---

Customers can be associated with Partner Users via a Partner Organization, in one of two ways:

1. When a Partner logs in and creates a new Customer, the Customer is automatically associated with that Partner

- When the Administrator option Edit Customer Partner is enabled, and the Partner Organizations 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: Dr.

First Name: Ashley

Last Name: Adam

Username: vouqes

Password: [Reset Password]

Web access:  Enabled  Disabled

**Contact**

Primary Email: aav@nsd.com

Send To: Primary Email

Org. Unit: Micro Focus

Find Org. Unit (Name)

Line Manager: Andy Fair

Find Line Manager (Last Name)

Address 1

Address 2

City

Zip

Country

Email Locale: English

Phone

Fax

Pager

Mobile (Required for SMS)

SMS Override:  Override Address?

**Partner**

Customer of: PO1

**Roles**

Current

Administrator  Supervisor

Manager  Technician

Finance  Partner

Customer

Default Portal: Customer Portal

**Details**

Custom 1

Notes

**Partner Organisation associated with a Customer within this field**

Locale: PO1

Time zone: Paris, E

Last Login

Delete Cancel Save

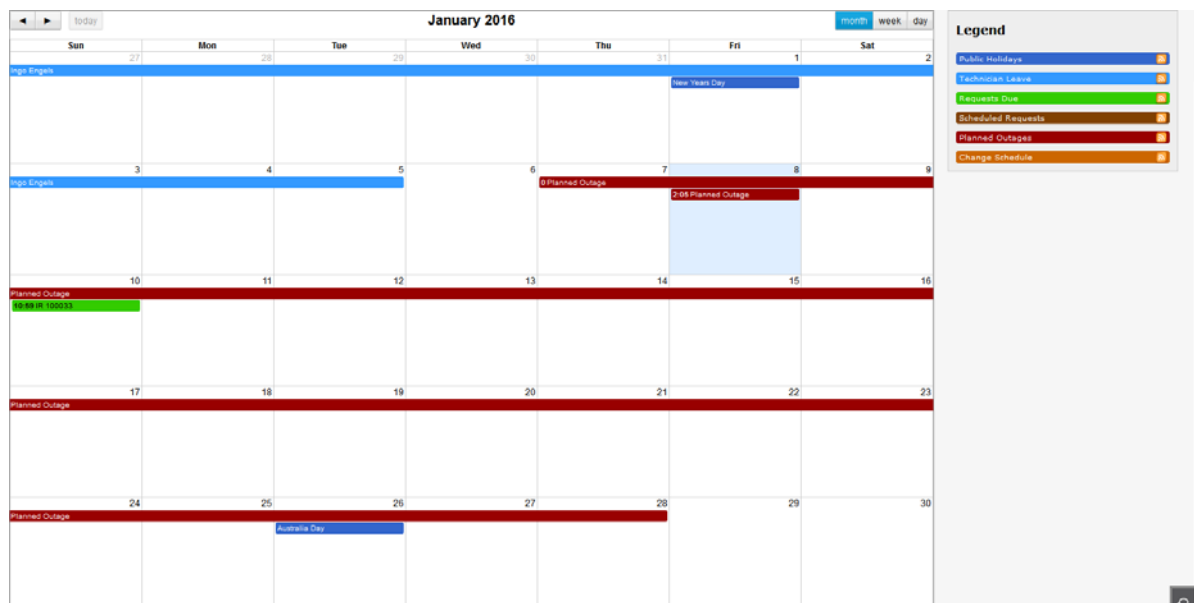
- ◆ My Tasks
- ◆ Dashboard
- ◆ Alerts
- ◆ Chat

### 3.1.3 Calendar

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.

- ◆ [My Account](#)
- ◆ [Feedback](#)

## 3.2 Operations

- ◆ [Section 3.2.1, "Request Fulfillment," on page 930](#)
- ◆ [Section 3.2.2, "Incident Management," on page 933](#)
- ◆ [Section 3.2.3, "Problem Management," on page 935](#)

### 3.2.1 Request Fulfillment

- ◆ [Request Fulfillment Overview](#)

## Request Tab

- ◆ [“Service Requests” on page 931](#)
- ◆ [“Summary Tab” on page 933](#)
- ◆ [“Request Groups” on page 933](#)
- ◆ [“Billing/Contracts” on page 933](#)

## Service Requests



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.  |
| Service Request Queue              | Displays Requests assigned to the System User by default, which Technicians can reassign after viewing<br><br>(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 within the Request tab, 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](#).

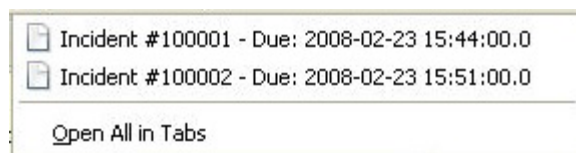
### **Service Request Search Tips**

- ◆ 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 to the Bookmarks Bar.

The following is an example of the information obtained by clicking on the RSS bookmark:



- ◆ [Customer Tab](#)
- ◆ [Quick Calls](#)
- ◆ [Item Tab](#)
- ◆ [Contract Tab](#)



- ◆ Details Tab
- ◆ Analysis Tab during Request Creation

### **Summary Tab**

- ◆ Analysis Tab
- ◆ Summary
- ◆ Service Terms
- ◆ Related Requests
- ◆ Status
- ◆ Priority
- ◆ Escalation Control
- ◆ *Notification*

### **Request Groups**

- ◆ Service Request Groups Tab
- ◆ Multi Item Requests

### **Billing/Contracts**

- ◆ Create a Contract
- ◆ Contracts & Invoices
- ◆ Time Recorded

### **Service Request Groups**

- ◆ Grouping Service Requests
- ◆ Multi Item Requests

## **3.2.2 Incident Management**

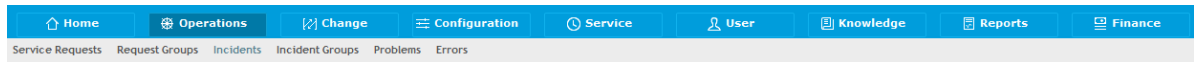
- ◆ “Incidents” on page 933
- ◆ “Incident GroupsIncidents” on page 935
- ◆ “Billing/Contracts” on page 935
- ◆ Incident Overview

### **Incidents**

- ◆ “Incident Tab” on page 934
- ◆ “Creating an Incident:” on page 934
- ◆ “Incident Queue” on page 934

- ◆ “Incident Search Tips” on page 934
- ◆ “RSS Feeds” on page 935

## Incident Tab



Incidents are requests raised for Customers, or raised by a Customer through the Customer Portal for a support service. An Incident is raised against a Configuration Item (Item) within the system. Incidents are assigned to Technicians and are escalated according to the Service Level Agreement (SLA) used.

The Operations>Incidents tab defaults to display all Incidents logged within the system. The other available Incident Filters include:

- ◆ My Active Incidents - displays all open/pending Incidents that are assigned to the logged-in User
- ◆ My Teams Incidents - displays all the Incidents allocated to the Teams that the User is assigned
- ◆ 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.)

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.

See: [Incident Queue](#)

### Incident Search Tips

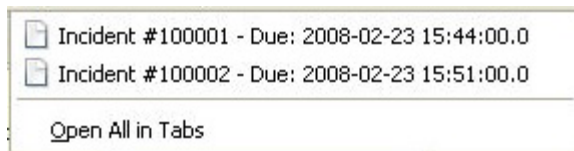
- ◆ The Incident Search option has a default Status to search only Active Incidents. To ensure search success, select the relevant Incident Status. If unsure, select All. To search for multiple Incident numbers at once, insert a comma separator between Incident numbers

- ◆ To search based on an Incident status, select the Incident Workflow option from the Workflow drop-down list. Once selected, a list of states will be 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 Incident 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 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 Bookmarks Bar.

The following is an example of the information obtained by clicking on the RSS bookmark:



## Incident Groups Incidents

- ◆ [Incident Groups](#)
- ◆ [Multi-Item Requests](#)

## Billing/Contracts

- ◆ [Contracts & Invoices](#)
- ◆ [Create a Contract](#)
- ◆ [Time Recorded](#)

## 3.2.3 Problem Management

- ◆ [“Problems Tab” on page 935](#)
- ◆ [“Billing/Contracts” on page 937](#)
- ◆ [Problem Overview](#)

## Problems Tab



The Operations>Problems tab defaults to display all Problems that require root-cause analysis logged within the system. The other available List Filters include:

- ◆ My Active Problems - displays all open/pending Problems that are assigned to the logged-in User
- ◆ My Teams Problems - displays all the Problems allocated to the Teams that the User is assigned.

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

A Problem is :

- ◆ Used to manage an ongoing or immediate situation where there is significant impact
- ◆ Created when more than one Incident has been raised around the same issue
- ◆ Used to find a solution to all the Incidents
- ◆ Differentiated from an Incident group, in that, a Problem is created to work on the cause of the Incidents within the Problem.

Problem Management can also be used pro-actively to prevent Problems by identifying related or recurring requests.

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 problem. 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 of LiveTime, the following information is required:

- ◆ [Customer Details](#)
- ◆ [Item Details](#)
- ◆ [Contract Details](#)
- ◆ [Classification and Description.](#)

## 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.
- ♦ [Customer Tab](#)
- ♦ [Quick Calls](#)
- ♦ [Item Tab](#)
- ♦ [Contract Tab](#)
- ♦ [Details Tab](#)

## Summary Tab

For details, see [Problem Management](#).

## Billing/Contracts

- ♦ Create a Request
- ♦ Contracts & Invoices
- ♦ Time Recorded
- ♦ Errors

See, [Problem Management](#).

## 3.3 Change

- ♦ [Change Overview](#)

### 3.3.1 Change Requests Tab



The Change Request tab defaults to display all Requests for Change (RFCs) logged within the system. The other available List Filters include:

- ♦ My Change Requests - displays all open/pending Requests that are assigned to the logged-in User
- ♦ My Teams Change Requests - displays all the RFCs allocated to the Teams that the User is assigned
- ♦ Pending Approvals - If the Supervisor User also has Manager privileges, this view provides the User with quick access to a list of requests that require Manager approval.

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](#)
- ♦ [Contracts Details](#)
- ♦ [Classification and Description.](#)

## 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 (See: [Full text searches.](#))
  - ♦ To search using an Item's Custom field information, select the Item Category to display any Custom Fields enable for that Item.
- ♦ [Customer Tab](#)
  - ♦ [Quick Calls](#)
  - ♦ [Item Tab](#)
  - ♦ [Contract Tab](#)
  - ♦ [Details Tab](#)

## Summary Tab

For details, see [Change](#).

## Change Groups

- ♦ [Change Groups](#)
- ♦ [Multi-Item RFCs](#)

## Billing/Contracts

- ♦ [Create a Request](#)
- ♦ [Contracts & Invoices](#)
- ♦ [Time Recorded](#)
- ♦ [Item RFC](#)

## 3.3.2 Change Groups Tab

- ◆ [“Multi-Item RFCs” on page 939](#)

### 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. The interface is divided into several sections:

- Customer:** Includes fields for Customer (Sachin Kumar), Item Number (10000101), Type (iPhone 6), Classification (General), Urgency (Moderate), Impact (Moderate), and Priority (Medium).
- Assignments:** Shows Escalation (On/Off), Escalation Layer (Default Group), and Technician (Ingo Engels).
- Notification:** Fields for Customer (Email), Customer CCs, Technician (Email), and Technician CCs.
- Change Request:** Fields for Team (Change Management Team), Workflow (Standard Change Workflow), Status (Pending - CAB), and Next Action (Pending - CAB).
- Service Terms:** Includes Agreement (SLA), Service Desk (Joe), Progress (a progress bar), Open Date, Due Date (01/16/16 12:49), FSC Date, Last Action (01/13/16 12:48), Time Recorded, and Affects (11 Users).
- ZENworks Tools:** Includes Manage (Bundles) and 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.

## 3.4 Configuration

- ◆ [Configuration Management](#)
- ◆ [Service Catalog](#)

### 3.4.1 Items

- ◆ [“View an Item” on page 941](#)
- ◆ [“To create an Item:” on page 941](#)
- ◆ [“Details” on page 945](#)
- ◆ [“Costs” on page 948](#)

- ◆ “Requests” on page 953
- ◆ “Relationships” on page 954
- ◆ “Outages” on page 957



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. See <a href="#">Creating Items</a> .        |
| Service Level Agreements (SLAs) | Service Level Agreements can be linked as follows: <ul style="list-style-type: none"> <li>◆ Per Item</li> <li>◆ Per Customer</li> <li>◆ Per Request</li> <li>◆ Per Organizational Unit.</li> </ul>   |
| 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. See <a href="#">Classification Tab</a> . |
| 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. See <a href="#">Categories LifeCycle</a> .  |

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 the ownership of Items in a bulk lot.

---

**NOTE:** Technicians can only edit an Item if they belong to the Item's support Team.

---

Filter views that are available within the Configuration>Items screen include:

---

| <b>Filter</b>     | <b>Relationship</b>   |
|-------------------|---|
| 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.

## 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&gt; Privileges&gt; 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.   |

| Item          | Description  |
|---------------|--|
| 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     | <p data-bbox="894 726 1438 842">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 data-bbox="915 863 1422 1058" style="list-style-type: none"> <li data-bbox="915 863 1422 953">1. Enter a Customer last name, or leave blank then click the Search button to view a list of all available Customers.</li> <li data-bbox="915 974 1422 1058">2. Click on the hyperlink for the relevant Customer name or names to assign them to the Item.</li> </ol> <p data-bbox="894 1079 1438 1142">If no specific Customer is allocated to the Item, it becomes a Global Item and is assigned to Everyone.</p>  |
| Org Units     | <p data-bbox="894 1173 1438 1262">These are the Org Units who own the Item. The Item can be assigned to one or multiple Organizational Units.</p> <p data-bbox="894 1283 1127 1310">To assign an Org Unit:</p> <ol data-bbox="915 1331 1422 1526" style="list-style-type: none"> <li data-bbox="915 1331 1422 1421">1. Enter an Org Unit name, or leave blank then click the Search button to view a list of available Org Units.</li> <li data-bbox="915 1442 1422 1526">2. Click on the hyperlink for the relevant Org Unit name or names to assign them to the Item.</li> </ol> <p data-bbox="948 1547 1438 1730"><b>NOTE:</b> 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: <a href="#">Primary Contact</a>.)</p> |
| Notification  |  |

| Item   | Description  |
|--------|--|
| Method | 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. |

3. Search and select an Item Type

4. Select 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.

## 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](#).

The screenshot shows the 'Item Information' form with the 'Details' tab selected. The form has a header with tabs for Information, Details, Costs, Requests, Relationships, Outages, and AMIE Snapshots. Below the tabs are buttons for Edit, Duplicate, and Print. The 'Item # Service Desk (Service Desk)' is displayed in the top right. The 'Details' section contains two columns of fields: Business Unit, Type, Environment on the left; and Date Responsible, Date Activated, Contact on the right. Below these are tabs for Description, Notes, Attachments, and Audit Trail. The 'Description' field is active and contains the text: 'Description entered here is displayed in the customer portal.' A 'Done' button is located at the bottom right of the form.

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).

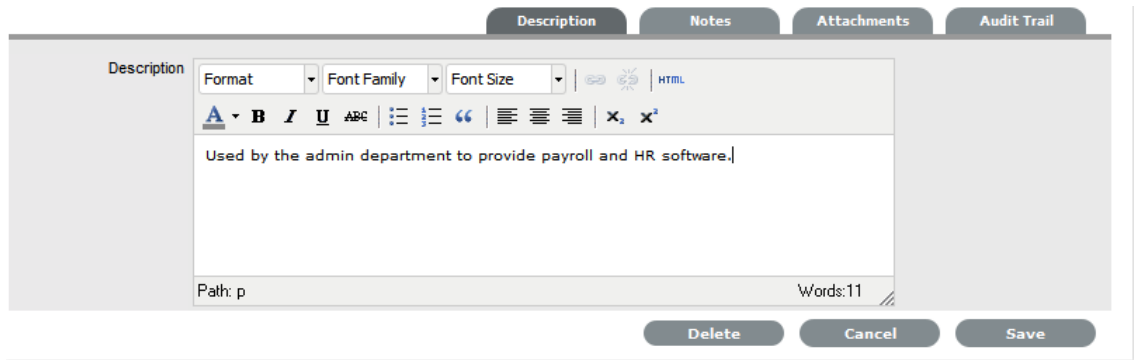
---

## 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



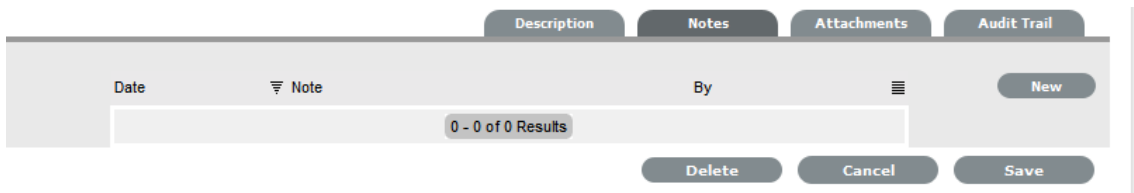
The screenshot shows a software interface with four tabs: Description, Notes, Attachments, and Audit Trail. The Description tab is active. Below the tabs is a rich text editor with a toolbar containing options for Format, Font Family, Font Size, and various text formatting icons (bold, italic, underline, link, unlink, list, quote, indent, outdent, subscript, superscript). The text area contains the text "Used by the admin department to provide payroll and HR software." Below the text area, it shows "Path: p" and "Words:11". At the bottom right of the editor are three buttons: Delete, Cancel, and Save.

4. Click Save.

## Item Notes

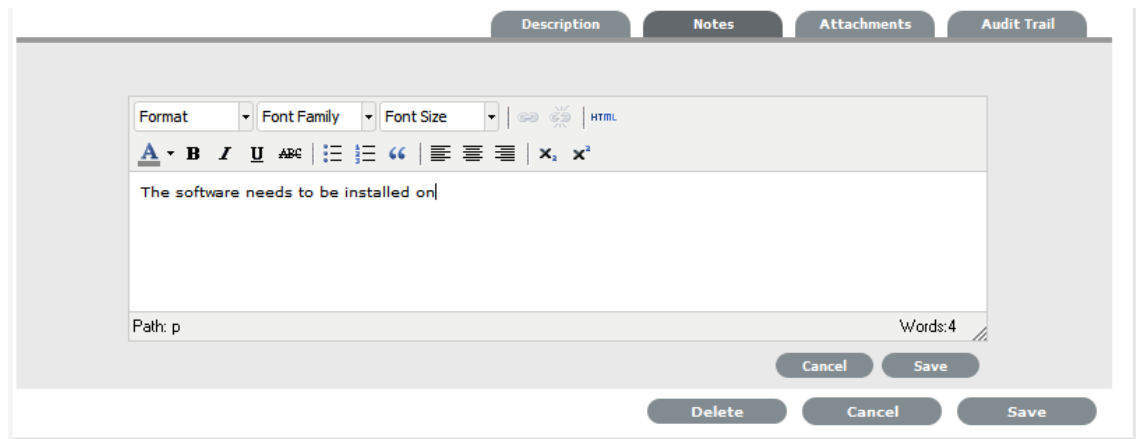
To add Notes to an Item, under the Item's Details tab:

1. Click Edit
2. Select the Notes tab



The screenshot shows a software interface with four tabs: Description, Notes, Attachments, and Audit Trail. The Notes tab is active. Below the tabs is a table with columns for Date, Note, and By. A search bar is present with the text "0 - 0 of 0 Results". At the bottom right of the interface are three buttons: Delete, Cancel, and Save. A "New" button is also visible in the top right corner of the table area.

3. Click New
4. Enter details in the Notes field



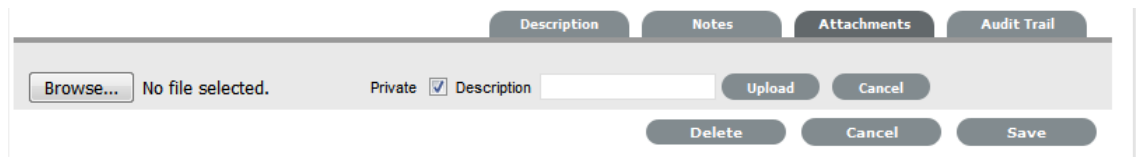
5. Click Save.

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.

| Description |                |   |          | Notes | Attachments | Audit Trail |
|-------------|----------------|---|----------|-------|-------------|-------------|
| 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

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:

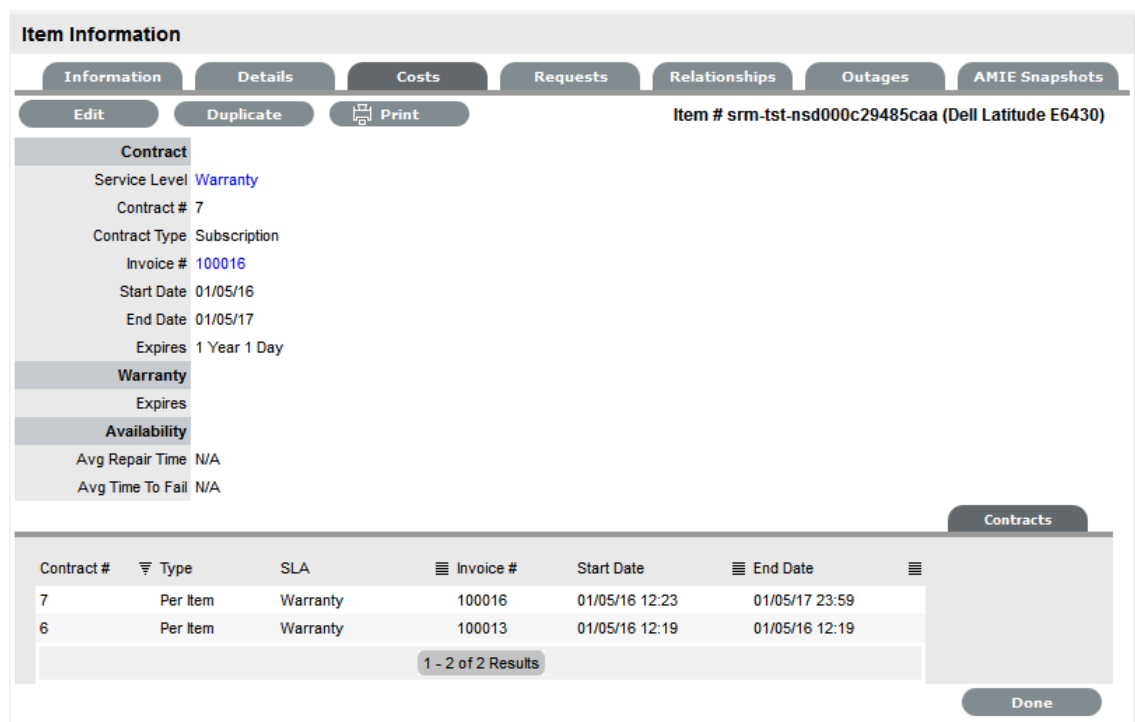


**Warning**

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.



The screenshot shows the 'Item Information' page for a Dell Latitude E6430. The 'Contracts' tab is active, displaying contract details and a table of contracts.

**Contract Details:**

- 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 Details:**

- Expires: [Link]

**Availability Details:**

- Avg Repair Time: N/A
- Avg Time To Fail: N/A

**Contracts Table:**

| 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

## Requests

This section lists all the requests that have been logged against an Item and is only visible to Technician Users 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                              |          |                |                   |              |                             |          |  |               |  |         |  |                |  |

## Relationships

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    |
|--------------------------------------|----------------|------------|-----------|
| <a href="#">jdk-7u60-windows-x64</a> | Windows Bundle |            | Installed |
| <a href="#">Wordweb7</a>             | Windows Bundle |            | Installed |
| <a href="#">Firefox 1.0</a>          | 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 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.



The screenshot shows the 'Item Information' interface with the 'Relationships' tab selected. The 'Direction' is set to 'Child - Parent'. A table displays the following relationship:

| Current Item                                     | Relationship  | Related Item   | Item #         | Identifier | Category |
|--|---------------|----------------|----------------|------------|----------|
| <input checked="" type="checkbox"/> Service Desk | is a child of | Windows Bundle | Microsoft 2010 |            | Service  |

At the bottom of the table, it indicates '1 - 1 of 1 Results'. There are 'Cancel' and 'Delete' buttons at the bottom right of the interface.

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

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

**Item Information**

Information Details Costs Requests Relationships Outages AMIE Snapshots

New Item Number 1000 (WIFI Service)

| No.                | Start Date | End Date | Reason | By |
|--------------------|------------|----------|--------|----|
| 0 - 0 of 0 Results |            |          |        |    |

Cancel Save

5. Click New

**Item Information**

Information Details Costs Requests Relationships Outages AMIE Snapshots

**Details**

Interval One Time

Start Date

End Date

Notification None

Offline Status Offline

Online Status Deployed

Reason

Cancel Save

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.

---

---

## Planned Outages

---

|              |  |
|--------------|--|
| 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     | <p>This option is displayed when a Notification is set for the Outage.</p> <p>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.</p> |
| 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: the first is set to 'Email' and the second is set to 'Primary Contacts'. The second row is labeled 'Reminder' and has a checked checkbox, a dropdown menu set to '24 hours', and the text '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.

See [Outages](#) for more information on setting up and viewing Item Outages.

- ◆ [Vendors](#)
- ◆ [Manufacturers](#)
- ◆ [Outages](#)

## 3.5 Service

- ◆ [Service Level Management](#)

### 3.5.1 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:

\* Denotes a mandatory field

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.

---

---

## SLA Editor

---

|                             |  |
|-----------------------------|--|
| Pause on Holiday            | <p>**This option is only displayed if the Observe Public Holidays option has been enabled within the Administrator&gt;Setup&gt;Privileges&gt;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&gt;Setup&gt;Public Holidays screen and associated with requests via the assigned Technician and their associated Country.</p> |
| Customer Timezone           | <p>When enabled, SLA times displayed within the Technician request view uses the Customer timezone.</p>  |
| Timezone                    | <p>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.</p>   |
| Requirements                |  |
| Availability*               | <p>Used to state the time an Item under the SLA is required to be online. The default value is set to 97%.</p>   |
| Interval Measured in        | <p>Defines the number of days over which the Availability requirement is calculated.</p>   |
| 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                        | <p>Use the Find Service Level Manager search option, to enter the contact details of the Manager who will monitor the performance of the SLA.</p>  |
| 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>  |
| Internal Cost ^             |  |

---

---

## SLA Editor

---

|                    |   |
|--------------------|---|
| Annual Cost ^      | <p>The SLA cost is calculated on the basis of what it 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 ^     | <p>Indicates the cost applied on a Per Request basis. This figure can be used as a reference for setting the Incident Price.</p>  |
| Hourly Cost ^      | <p>Indicates the cost applied on an Hourly basis. This figure can be used as a reference for setting the Hourly Price.</p>  |
| Customer Pricing ^ |   |
| Annual Price ^     | <p>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.</p> <p>The figure entered should be on a Annual Price per User basis.</p> |
| Request Price ^    | <p>Indicates the price paid by the customer when the SLA is applied on a Per Request basis.</p>   |
| Hourly Price ^     | <p>Indicates the price paid by the customer when the SLA is applied on an Hourly basis.</p>   |

^ 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

*Common:* Select Common if the SLA is to apply across Incidents, Requests, Problems and Change Management.

*Per Process:* 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

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.

---



---

## 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 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.  |
| 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

The screenshot shows the 'SLA Editor' interface with the 'Details' tab selected. It includes radio buttons for 'Common' (selected) and 'Per Process' under 'Targets', and 'Hours' (selected) and 'Minutes' under 'Interval'. Below is a table for 'Service Time' with columns for Priority, Response Time, Restoration Time, Resolution Time, 24 x 7 support, and Alert. The table lists four priority levels: Urgent, High, Medium, and Low, each with corresponding time values and support/alert settings. 'Cancel' and 'Next' buttons are at the bottom right.

| 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

- 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.

---

**NOTE:** 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.

- 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.

- 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 'Support' tab selected. The 'Support' section has two radio buttons: '24 x 7' (unselected) and 'Normal Support' (selected). Below this is an 'Apply Template' dropdown menu. The 'Weekdays' section shows a dropdown menu with two options: 'Weekdays 8 to 5' (selected) and 'Weekdays 9 to 5'. Below this is a table of support hours for each day of the week:

| Day       | Start Time | End Time |
|-----------|------------|----------|
| Sunday    | <closed>   | <closed> |
| Monday    | 08:00      | 17:00    |
| Tuesday   | 08:00      | 17:00    |
| Wednesday | 08:00      | 17:00    |
| Thursday  | 08:00      | 17:00    |
| Friday    | 08:00      | 17:00    |
| Saturday  | <closed>   | <closed> |

At the bottom of the form are 'Cancel' and 'Save' buttons.

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.

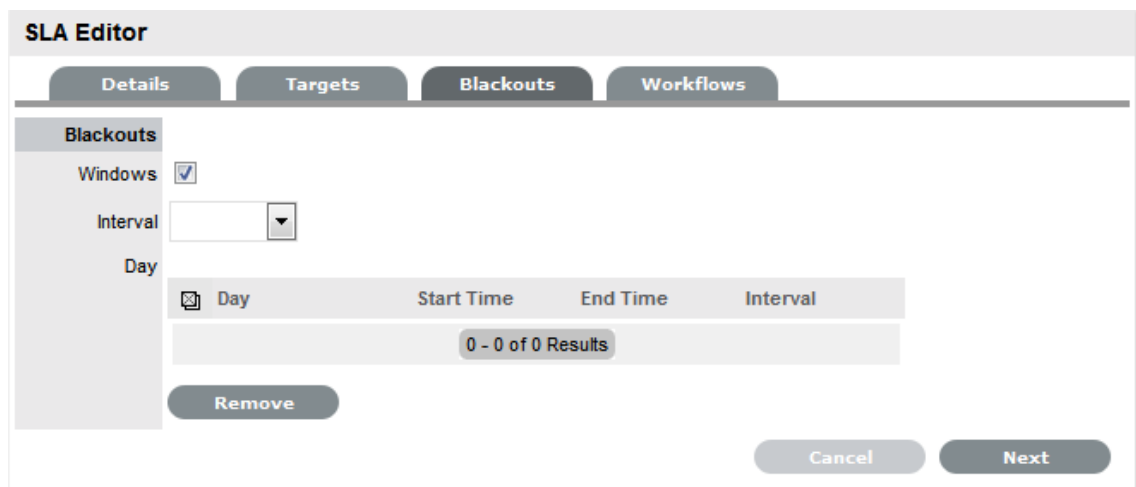
A Blackout Period is based on an agreement between the Customer and the Service Desk regarding set times that the Customer has no service expectations. This can also be the preferred time for Item upgrades and maintenance as they will not affect service availability.

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



The screenshot shows the 'SLA Editor' interface with the 'Blackouts' tab selected. The 'Windows' checkbox is checked. The 'Interval' is set to a dropdown menu. Below, there is a table with columns for 'Day', 'Start Time', 'End Time', and 'Interval'. The table is currently empty, showing '0 - 0 of 0 Results'. There are 'Remove', 'Cancel', and 'Next' buttons at the bottom.

| Day                | Start Time | End Time | Interval |
|--------------------|------------|----------|----------|
| 0 - 0 of 0 Results |            |          |          |

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.

**SLA Editor**

Details Targets Blackouts Workflows

**Blackouts**

Windows

Interval Weekly

Apply Template

Day Sun from <undefined> to <undefined>

| <input type="checkbox"/> Day | Start Time | End Time | Interval |
|------------------------------|------------|----------|----------|
| <input type="checkbox"/> Fri | 08:00      | 17:00    | Weekly   |
| <input type="checkbox"/> Thu | 08:00      | 17:00    | Weekly   |
| <input type="checkbox"/> Wed | 08:00      | 17:00    | Weekly   |

1 - 3 of 3 Results

Remove

Cancel Next

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

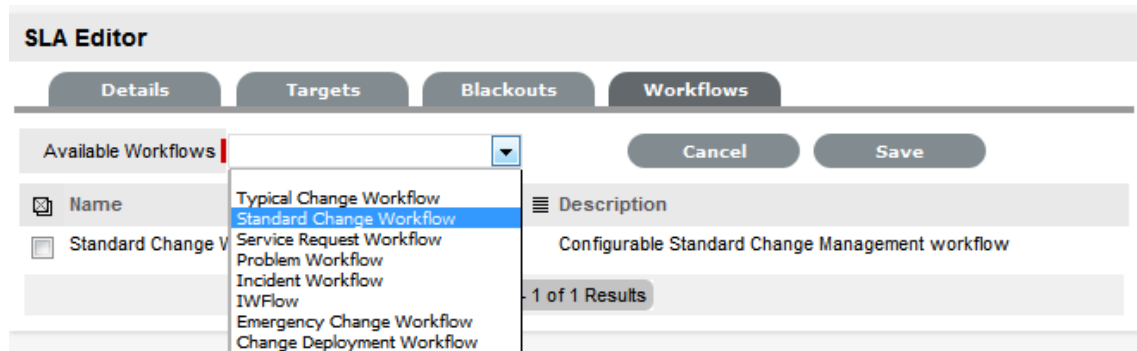
Workflows are associated with an SLA through the Workflows tab of the SLA Editor screen or within the Workflow itself. All SLAs assigned to the SLA are listed within this tab and Workflows can be added or removed within this tab, as required.

## 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.



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.

See: [Assigning an SLA to a Customer](#)

See: [Assigning an SLA to an Organizational Unit when Contracts are Disabled](#)

## Assigning a Default Workflow to an SLA

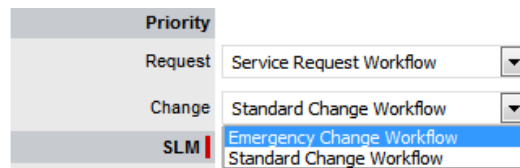
If more than one process Workflow is assigned to an SLA, it is required to select a default Workflow. This default Workflow will be the Workflow assigned to a request when the SLA assigned supports more than one Workflow.

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.
- ◆ [OLAs Tab](#)
  - ◆ [Underpinning Contracts Tab](#)

## Workflows

- ◆ [Incident & Problem Workflows](#)
- ◆ [Request & Change Workflows](#)
- ◆ [Release Workflow](#)
- ◆ [Status Notes](#)
- ◆ [Breach Codes Tab](#)
- ◆ [Assigning an SLA](#)

## 3.6 User



The User tab provides the options to create, modify and view Customer accounts and Organizational Units - companies and departments.

The sub-menu options within the User tab include:

- ◆ [Customers](#)
- ◆ [Organizational Units.](#)

- ◆ Customers
- ◆ Organizational Units

## 3.7 Knowledge

- ◆ Articles
- ◆ FAQs
- ◆ Article Groups
- ◆ Forums

## 3.8 Reports

- ◆ Section 3.8.1, “Create a Report,” on page 972
- ◆ Section 3.8.2, “Trend Reports,” on page 973
- ◆ Section 3.8.3, “Requests,” on page 975



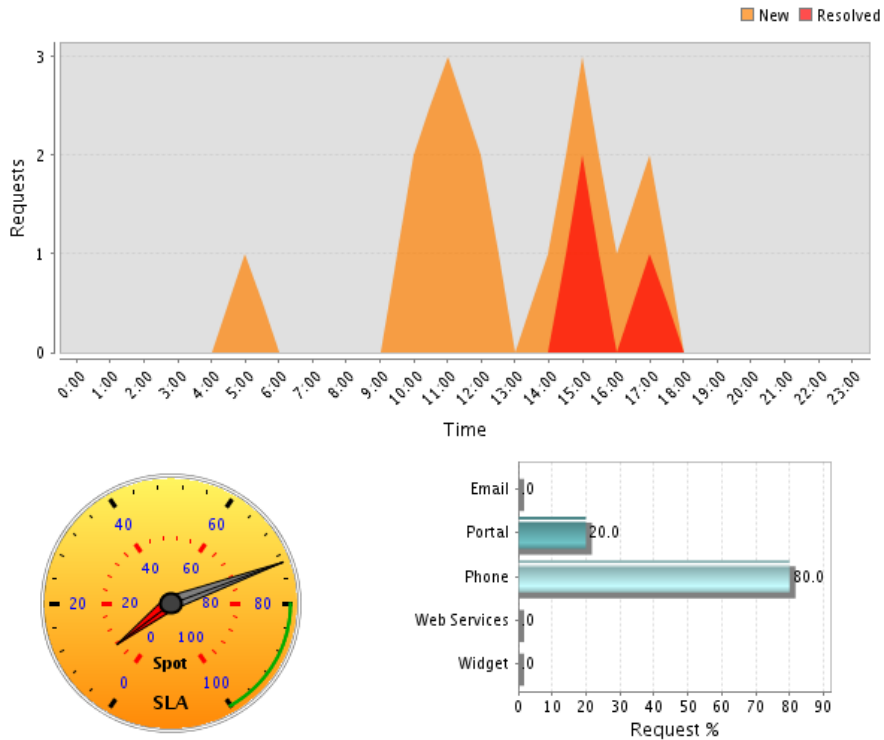
The system online reporting provides Technician Users with a graphical snapshot of the overall performance of the service desk and its Users. The real-time reports module delivers easy access, and on-demand visual feedback that can be exported to Excel and PDF format.

### 3.8.1 Create a Report

1. Select Reports> Report Type (e.g. Incident) sub-menu option
2. Select a Process, if relevant
3. Use the drop-down list to select the report required
4. Enter the date range, if applicable  
The default Start Date is the last day of the previous month.
5. Refine parameters, if required
6. Click Create to generate the report.



### Incident Summary: 01/01/16 to 01/19/16



**NOTE:** The results are displayed as a chart and as a text table. They both can be exported as an Excel spreadsheet or as a PDF document.

## 3.8.2 Trend Reports

A Trend Report allows data to be compared over time to monitor patterns. This type of report is only available for Incident, Problem, Service and Change Requests.

To create a Trend report:

1. Select Reports> Report Type (e.g. Incident) sub-menu option
2. Use the drop-down list to select the required report
3. Select the Trend checkbox

**Incident Reports**

Process: Incident Reports

Report Type: Open Incidents by Priority

Start Date (mm/dd/yy): 01/01/16

End Date (mm/dd/yy): 01/19/16

Trend:  Day

Day  
3 Days  
Week  
Fornight  
Month

Create

- If the trend data is available for the selected report, a drop-down field appears. Select a period for the data:

---

**Date Ranges for Trend reports:**

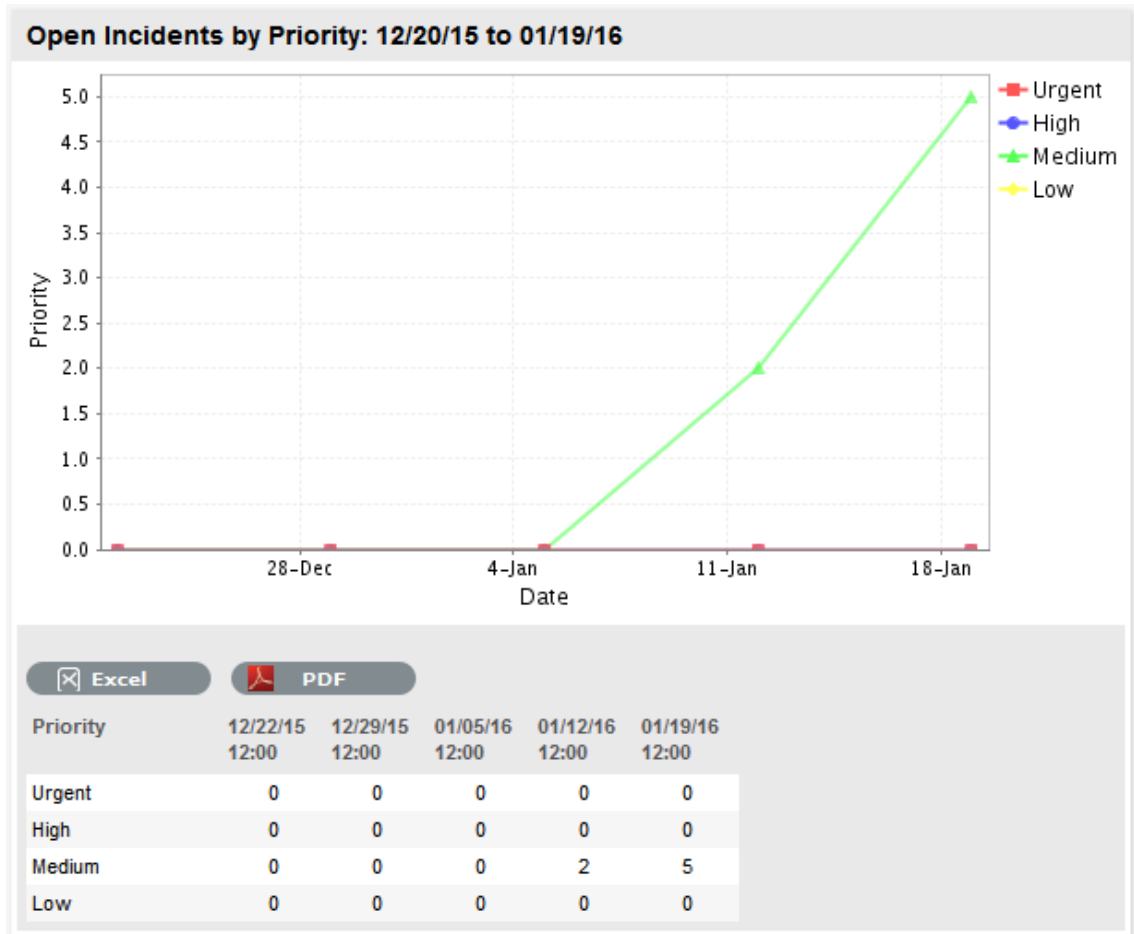
---

|           |                           |
|-----------|---------------------------|
| Day       | Up to 14 days.            |
| 3 Days    | Up to 30 days.            |
| Week      | Up to at least 10 weeks.  |
| Fortnight | Up to at least 10 weeks.  |
| Month     | Up to at least 12 months. |

---

- For Start Date, enter the start date or click on the calendar icon to define it within the calendar
- Enter the End Date or select it from the calendar

7. Click Create.



The following Reports are available for business analysis:

- ◆ [Incident Reports](#)
- ◆ [Problem Reports](#)
- ◆ [Change Request Reports](#)
- ◆ [Service Request Reports](#)
- ◆ [Configuration Reports](#)
- ◆ [Knowledge Reports.](#)

### 3.8.3 Requests

- ◆ [Service Request Reports](#)
- ◆ [Problem Reports](#)
- ◆ [Change Request Reports](#)
- ◆ [Incident Reports](#)
- ◆ [Configuration](#)
- ◆ [Knowledge](#)



# 4 Manager Guide

- ◆ [Section 4.1, “Home,” on page 977](#)
- ◆ [Section 4.2, “Operations,” on page 981](#)
- ◆ [Section 4.3, “Change,” on page 998](#)
- ◆ [Section 4.4, “Service,” on page 1006](#)
- ◆ [Section 4.5, “User,” on page 1008](#)
- ◆ [Section 4.6, “Knowledge,” on page 1008](#)
- ◆ [Section 4.7, “Reports,” on page 1008](#)

## 4.1 Home



The default screen within the Manager Home tab is the Dashboard tab and also includes the My Account and Feedback tabs.

The Home tab provides access to the following tabs:

- ◆ [Dashboard](#) - The Dashboard can be configured to provide the Manager access to real-time system reports in a single screen
- ◆ [My Account](#) - Allows the User to edit their personal information, including password resets and set their time zone
- ◆ [Feedback](#) - Allows the User to access published Surveys that are ready for completion.

### 4.1.1 Manager Role

A User with the Manager Role is a User who can oversee the activities of the Service Desk. 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 the service and support Team, 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
- ◆ Approve Service and Change Requests
- ◆ Approve Knowledge Base content

- ◆ Access the full range of reports
- ◆ Create and modify Item information.

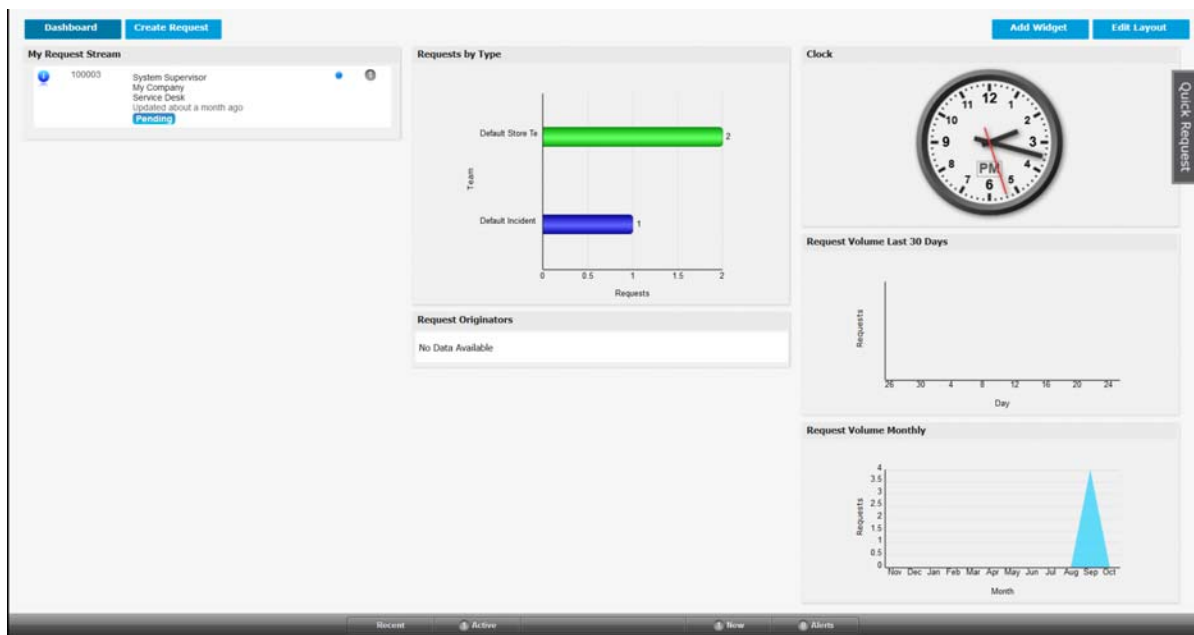
---

**NOTE:** Users who manage the service desk and are to be included as a Team member within support Teams, should be allocated a Supervisor Role.

---

## 4.1.2 Dashboard

The Dashboard is the default landing page for Manager Users when they log into the system. It provides a customizable screen that can display an automatically refreshed Service and Change Request list, system reports and information using widgets. The Request Stream widget provides Manager Users with a list of Service and Change Requests that require approval and automatically updates without requiring a screen refresh, as is required in the Operations and Change tabs.



### 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.

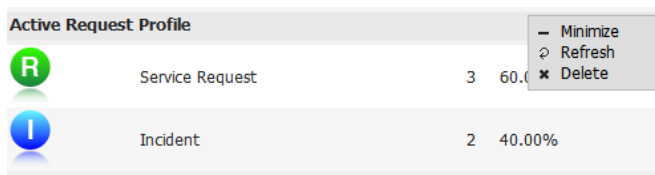
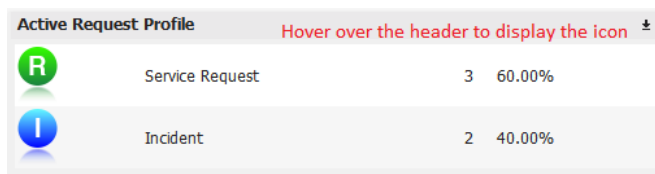


3. Click the image for the required Layout option

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

**Add Widget**

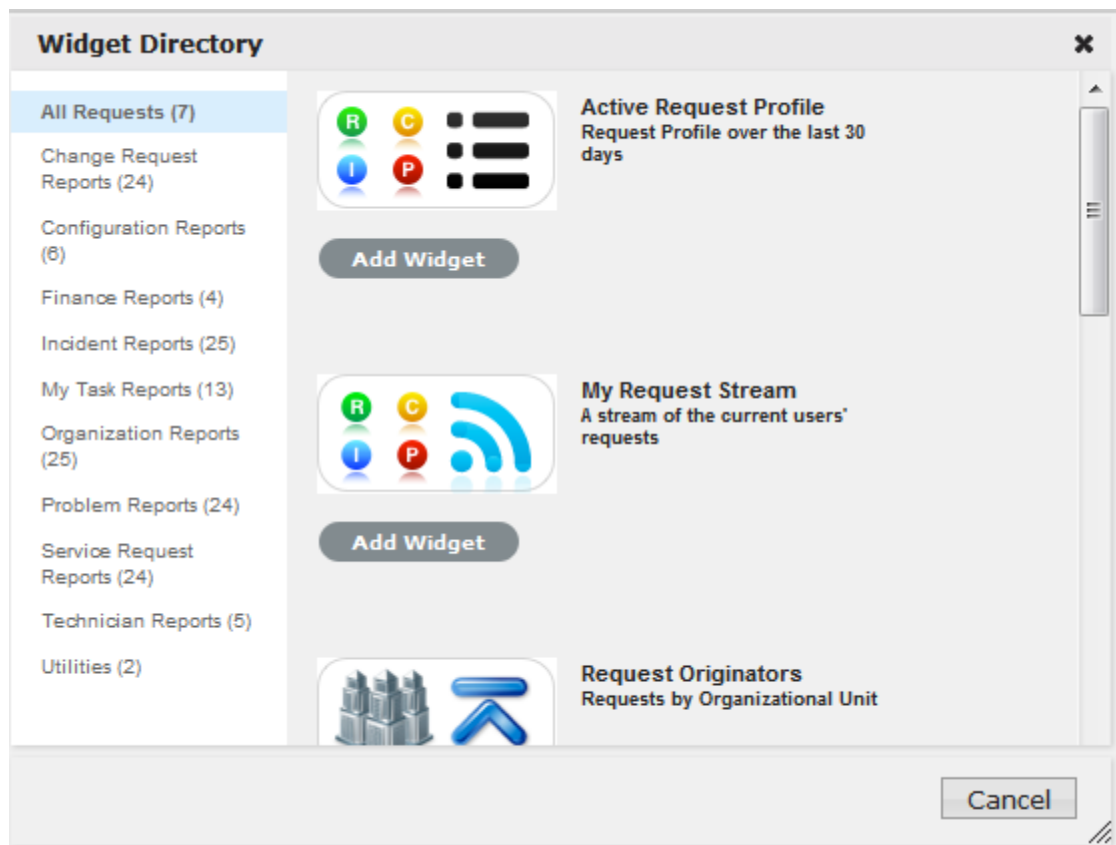
The Widget Directory is displayed with the categories across request types, Configuration Management, Finance and Utilities.

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.



- ◆ [My Account](#)
- ◆ [Feedback](#)

## 4.2 Operations

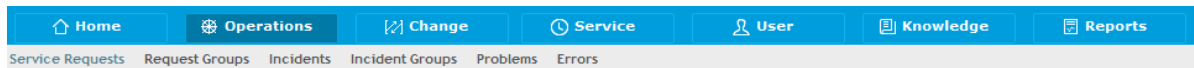
- ◆ [Section 4.2.1, “Request Fulfillment,” on page 981](#)
- ◆ [Section 4.2.2, “Incident Management,” on page 988](#)
- ◆ [Section 4.2.3, “Problem Management,” on page 994](#)

### 4.2.1 Request Fulfillment

- ◆ [Request Fulfillment Overview](#)

#### Service Requests

- ◆ [“Service Request Search Tips:” on page 982](#)
- ◆ [“Viewing Service Request Information” on page 982](#)



Service Requests are customer requests logged against Items that use the Service Category. Manager access provides a *read only* view of Service Requests logged with the application.

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.  |
| 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.) |

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.

### 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.


### Viewing Service Request Information





To view Request details, select the relevant Request Reference # hyperlink and the screen will default to the Summary Tab. The Summary tab provides comprehensive details related to the Service Request.

The summary information includes the following:

| Summary Tab | Description  |
|-------------|--|
| Contact     | <p>Displays the Customer assigned to the Request and their contact information. Click on the Customer Name or Org.Unit link for more details relating to Customer and Org Unit.</p> <p>To update the Customer details assigned to the request, click on the Customer tab and ensure the Request is in edit mode.</p> |

| Summary Tab      | Description   |
|------------------|---|
| Item             | <p>Displays the Item assigned to the Request. Scroll over  to view Item information recorded on the Details tab. Select the Type hyperlink for more information about the Item.</p> <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> |
| Details          |   |
| Classification   | <p>Displays the Request Classification that was selected when the Request was created. This can be updated, if required.</p>  |
| Priority         | <p>Shows the priority of the Request, which determines the Service Level triggers applied to the Request.</p> <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>   |
| Escalation       | <p>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.</p>  |
| Escalation Layer | <p>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.</p>  |
| Technician       | <p>The name of the Technician assigned to the Request.</p> <p>When a Service Request is assigned to the Queue, the name applied in the Technician field is System User.</p>   |
| Notification     |   |
| Customer         | <p>Shows 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.</p> <p><i>Customer CCs</i> is a free text field for any additional notification recipients, these can be divided into Customer and Technician CC lists.</p>   |

| Summary Tab     | Description  |
|-----------------|--|
| Technician      | <p>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.</p> <p><i>Technician CCs</i> is a free text field for any additional notification recipients, these can be divided into Customer and Technician CC lists.</p>  |
| Alternate Team  | <p>Is visible if the "Notify Alternate Team" option is enabled in the Admin&gt;Email&gt;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.</p>  |
| Service Request |  |
| Team            | <p>Displays the default support Team assigned to the Request. This can be changed by selecting another option within the drop-down list. The Team list is derived from the Workflow and Workflow State.</p>  |
| Workflow        | <p>Displays the default Workflow assigned to the Request. This can be changed by selecting another option within the drop-down list. The Workflow list is derived from the SLA assigned to the Request.</p> <p>Select  to view the Workflow in its entirety.</p>  |
| Status          | <p>Shows the current Workflow State of the Request.</p>  |
| Next Action     | <p>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.</p> <p>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.</p> |
| Status Due      | <p>Details the expiry time for the current Workflow State if the State has an OLA assigned.</p>  |
| 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>   |

| Summary Tab     | Description   |
|-----------------|---|
| Service Manager | Displays the name of the Service Level Manager responsible for overseeing Requests related to the assigned service agreement.   |
| Progress        | <p>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:</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> |
| 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.  |

## Request Approval Process

As part of the Request Fulfillment approval process, Users that have a Manager Role and are assigned to a Service Request Team can approve or reject Service Requests. To allow a Manager to approve a Request they must be assigned to the Service Request Workflow Approval State. (See: [Service Request Teams](#).) Then, when a Request is moved into an Approval State, the Manager is assigned the Request allowing them to view and reject or accept the Request.

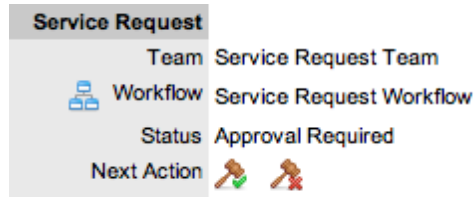
The security of the approval process can be enhanced by forcing the assigned Manager to re-enter their User Name and Password when processing a request. This is achieved by enabling the Strong Authentication option for the Team. (See: [Service Request Teams](#).)

The service management system allows Managers to approve a Request either via the application's interface or email.

### Accept or Reject a Service Request via the application

1. Select the Request tab
2. Select the filter option Pending Approvals
  - From the list provided select a Request ID hyperlink.
3. Click Edit

The Accept and Reject will be available to process the Request.



4. Select the Next Action option

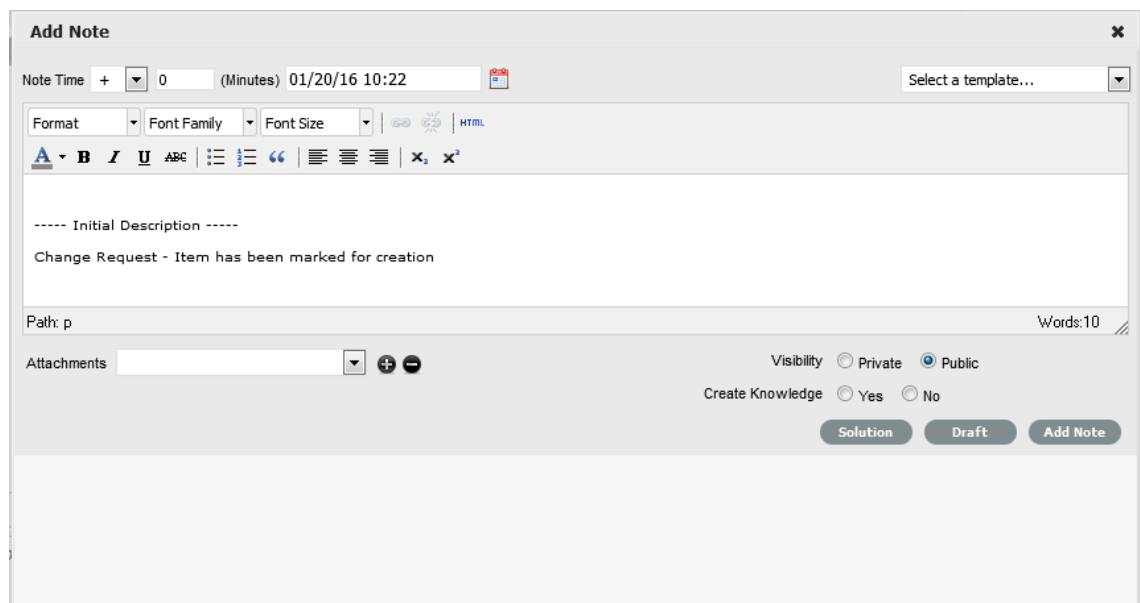
Click (Accept) or (Reject) button to move the Service Request into the relevant pre-defined state and re-assign the Request to a Technician allocated to the status.

5. Enter Authentication details, if prompted

When the Strong Authentication option is enabled for the Change Team associated with the request, an Approve Change Request window is displayed prompting the User to enter their Password details. Enter your Password and select the Authenticate button and click to close the pop-up window.

6. Enter additional details in the Notes Tab, if relevant

A Notes window is displayed to allow the Manager to add detailed information regarding the approval option selected.



7. Click Add Note.

Note that the Manager User will no longer be able to edit the Request after the selection is made, and the Request will continue through the Service Request Workflow Lifecycle.

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**NOTE:** If the Approval State is configured to be an Item Details Editable state, the Manager can amend the Item details when in this State.

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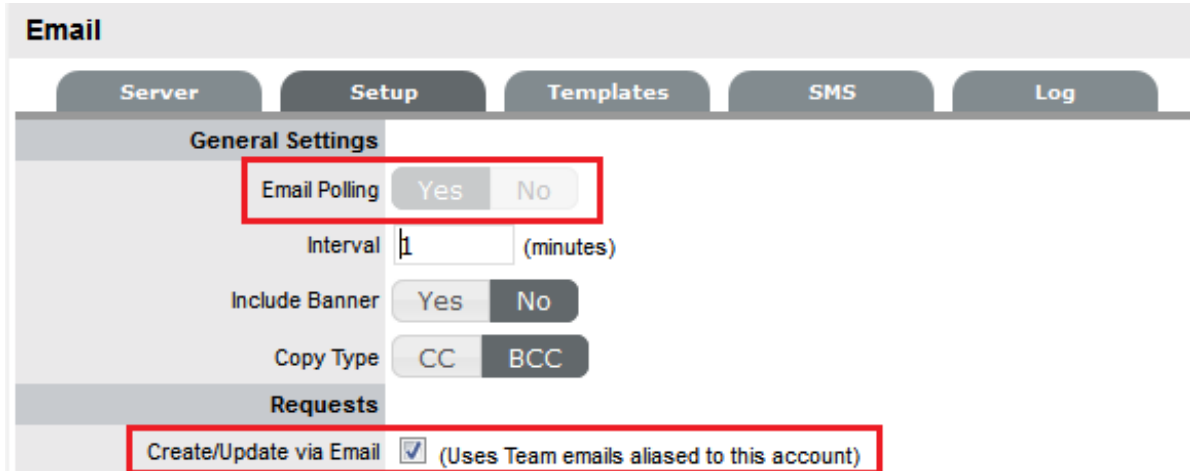
## Accept or Reject a Request via email

To use the Manager Request approval process via email, the following configuration must be in place:

The Administrator must configure the system Setup>Email screens to include:

- ♦ Email Polling functionality
- ♦ Create via Email option
- ♦ Customise the ApproveServiceRequest email content, as required.

The Supervisor must also include an incoming email address for the Service Request Team.



The screenshot shows the 'Email' configuration page with a navigation bar containing 'Server', 'Setup', 'Templates', 'SMS', and 'Log'. The 'Setup' tab is active. Under 'General Settings', there are four rows of controls: 'Email Polling' with 'Yes' and 'No' buttons (highlighted with a red box), 'Interval' with a text input field containing '1' and '(minutes)', 'Include Banner' with 'Yes' and 'No' buttons, and 'Copy Type' with 'CC' and 'BCC' buttons. Under the 'Requests' section, there is a row with 'Create/Update via Email' (checked checkbox) and '(Uses Team emails aliased to this account)' (highlighted with a red box).

When a Service Request is escalated to an Approval State, an email is sent to the assigned Manager User informing them that a Request is pending approval. The Manager can approve or reject the Service Request by simply replying to the escalation email using the words Accept /Yes or Reject/No.

When the system polls for incoming email, the Manager's response is automatically applied to the relevant Request and based on the Manager's response, the Request is routed to a Technician allocated to the next Workflow State. The Manager is also sent a confirmation email informing them that their selected action has been applied to the Request.

Example of email sent to Manager:

This Service Request is pending your approval.

Please access the Service Desk to approve the Service Request manually.

Alternatively, you may reply to this email:

To Accept the Service Request, include the words 'accept' or 'yes'.

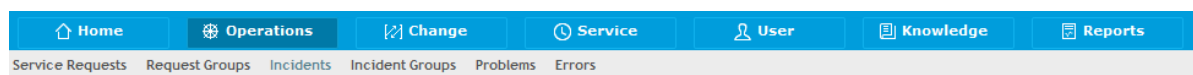
To Reject the Service Request, include the words 'reject' or 'no'.

| Service Request Information |                                       |
|-----------------------------|---------------------------------------|
| Service Request #:          | 100016                                |
| Date Opened:                | 11/25/09 13:01 (MM/dd/yy HH:mm)       |
| Classification:             | General                               |
| Technician:                 | Manager User                          |
| Item #:                     | 100002                                |
| Item Type:                  | Service Desk                          |
| Identifier:                 |                                       |
| Customer:                   | Dan Springer                          |
| Org Unit:                   |                                       |
| Customer Room:              |                                       |
| Country:                    |                                       |
| Due Date:                   | 11/25/09 16:01                        |
| Description:                | Request to update to Microsoft Vista. |

## 4.2.2 Incident Management

- ◆ [Incident Overview](#)

### Incident Tab



Incidents are requests raised for Customers, or raised by a Customer through the Customer Portal for a support service. An Incident is raised against a Configuration Item (Item) within the system. Incidents are assigned to Technicians and are escalated according to the Service Level Agreement (SLA) used.

For Users with Manager access to the Incident Management Process the Incidents tab provides a *read only* view of Incidents logged with the application. The tab defaults to display All Incidents logged within the system. 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 amended using the Display pop-up option.



## 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. Once selected, a list of states will be 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 Incident 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.


## Viewing Incident Information:





To view Incident details, select the relevant Incident Reference # hyperlink and the screen will default to the Summary Tab. The Summary tab provides comprehensive details related to an Incident.

The summary information includes the following:

| Summary Tab | Description   |
|-------------|---|
| Contact     | <p>Displays the Customer assigned to the Incident and their contact information. Click on the Customer Name or Org.Unit link for more details relating to Customer and Org Unit.</p> <p>To update the Customer details assigned to the request, click on the Customer tab and ensure the Request is in edit mode.</p> |
| Send Survey | <p>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.</p>  |

| Summary Tab      | Description   |
|------------------|---|
| Item             | <p>Displays the Item assigned to the Incident. Scroll over  to view Item information recorded on the Details tab. Select the Type hyperlink for more information about the Item.</p> <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 details 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> |
| Details          |   |
| Classification   | <p>Displays the Incident Classification that was selected when the Incident was created. This can be updated, if required.</p>  |
| Priority         | <p>Shows the priority of the Incident, which determines the Service Level triggers applied to the Incident.</p> <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>  |
| Escalation       | <p>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.</p>   |
| Escalation Layer | <p>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.</p>   |
| Technician       | <p>The name of the Technician assigned to the Incident.</p> <p>When an Incident is assigned to the Queue, the name applied in the Technician field is System User.</p>  |
| Notification     |   |
| Customer         | <p>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.</p> <p><i>Customer CCs</i> is a free text field for any additional notification recipients, these can be divided into Customer and Technician CC lists.</p>   |

| Summary Tab     | Description  |
|-----------------|--|
| Technician      | <p>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.</p> <p><i>Technician CCs</i> is a free text field for any additional notification recipients, these can be divided into Customer and Technician CC lists.</p> |
| Alternate Team  | <p>Is visible if the Notify Alternate Team option is enabled in the Admin&gt;Email&gt;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.</p>   |
| Incident        |  |
| Team            | <p>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.</p>   |
| Workflow        | <p>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> <p>Select  to view the Workflow in its entirety.</p>                        |
| Status          | <p>Shows the current Workflow State of the Incident.</p>   |
| Next Action     | <p>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.</p>   |
| Status Due      | <p>Details the expiry time for the current Workflow State if the State has an OLA assigned.</p>  |
| Service Terms   |  |
| Agreement       | <p>Displays the Service Level Agreement assigned to the Incident. The SLA is derived from either the Item, Customer or Organizational Unit.</p>  |
| Service Manager | <p>Displays the name of the Service Level Manager responsible for overseeing Incidents related to the assigned service agreement.</p>  |

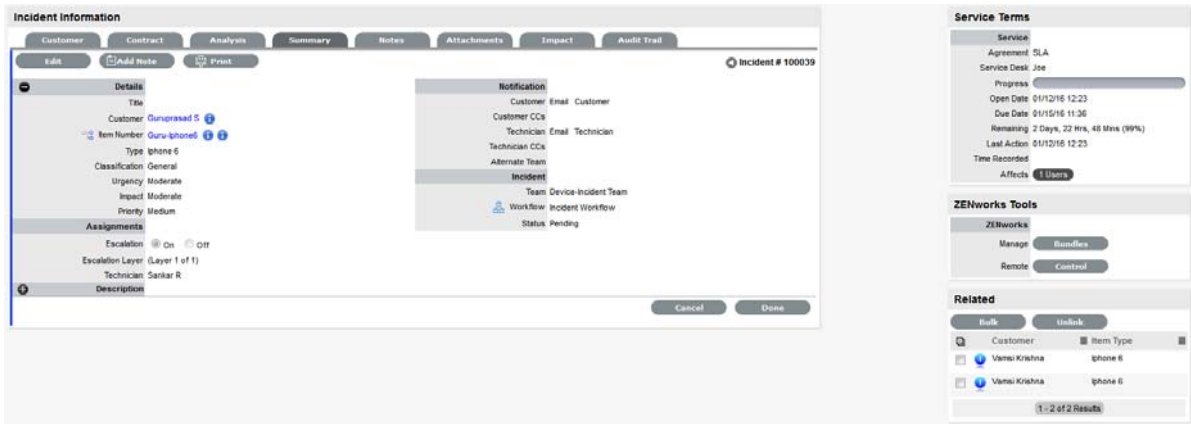
| Summary Tab   | Description   |
|---------------|---|
| Progress      | <p>Visually displays how the Incident is tracking against the assigned SLA and displays the percentage of SLA used when greater than 10%. The grey progress bar is gradually filled in based on the status of the SLA:</p> <p> - Workflow 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> |
| 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.  |

## Multi-Item Requests

Also 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.

For more information about managing Multi-Item Requests, see [Related Requests](#).

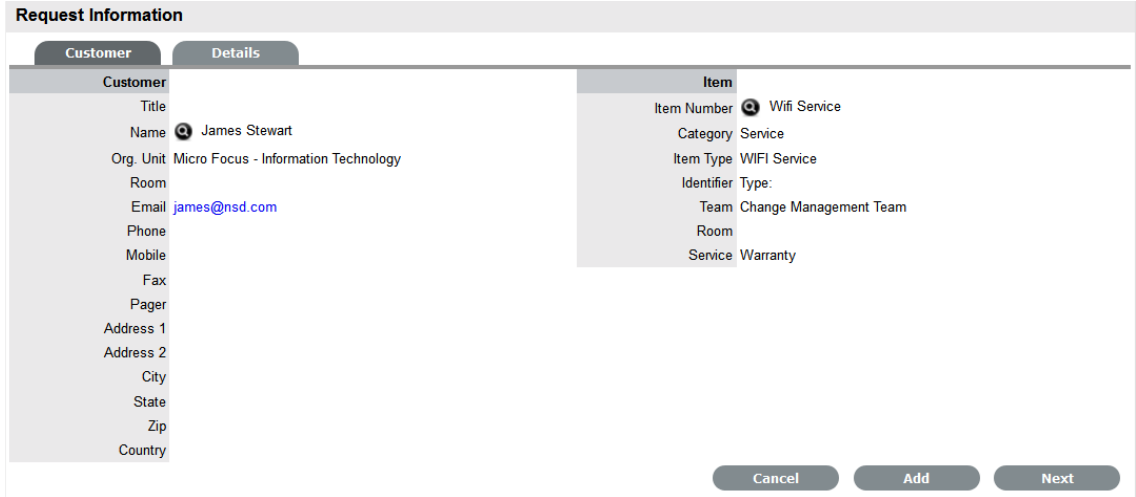
### Multi-Item Request Item Assignment

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    |
| <a href="#">James Stewart</a> | 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** Details

Request Type: New Incident

Classification: General

Subject:

Description:

Format: Font Family: Font Size: HTML

Path: p

Words: 0

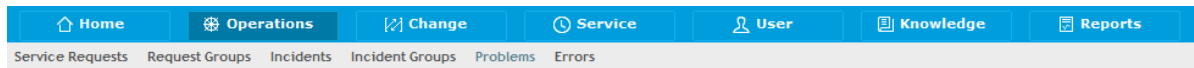
Cancel Done

- 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.

## 4.2.3 Problem Management

- [Problem Management Overview](#)

### Problem Management



Manager access provides a *read only* view of Problems logged with the application. The Problems tab defaults to display All Problems logged within the system. 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 issues.

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 problem. 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.

### ***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.

### ***Viewing Problem Information:***


To view Problem details, select the relevant Problem Reference # hyperlink and the screen will default to the Summary Tab. The Summary tab provides comprehensive details related to a Problem.





The summary information includes the following:

| <b>Summary Tab</b> | <b>Description</b>   |
|--------------------|--|
| Contact            | <p>Displays the Customer assigned to the Problem and their contact information. Click on the Customer Name or Org.Unit link for more details relating to Customer and Org Unit.</p> <p>To update the Customer details assigned to the request, click on the Customer tab and ensure the Request is in edit mode.</p> |

| Summary Tab      | Description   |
|------------------|---|
| Item             | <p>Displays the Item assigned to the Problem. Scroll over  to view Item information recorded on the Details tab. Select the Type hyperlink for more information about the Item.</p> <p>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.</p> <p>To update the Item details 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> |
| Details          |   |
| Classification   | <p>Displays the Problem Classification that was selected when the Problem was created. This can be updated, if required.</p>  |
| Priority         | <p>Shows the priority of the Problem, which determines the Service Level triggers applied to the Problem.</p> <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 Problem to alter the Priority assigned.</p>   |
| Escalation       | <p>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.</p>  |
| Escalation Layer | <p>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.</p>   |
| Technician       | <p>The name of the Technician assigned to the Problem.</p> <p>When a Problem is assigned to the Queue, the name applied in the Technician field is System User.</p>   |
| Notification     |   |



| Summary Tab     | Description   |
|-----------------|---|
| Technician      | <p>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.</p> <p><i>Technician CCs</i> is a free text field for any additional notification recipients, these can be divided into Customer and Technician CC lists. .</p> |
| Alternate Team  | <p>Is visible if the Notify Alternate Team option is enabled in the Admin&gt;Email&gt;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.</p>   |
| Problem         |   |
| Team            | <p>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.</p>   |
| Workflow        | <p>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.</p> <p>Select  to view the Workflow in its entirety.</p>                           |
| Status          | <p>Shows the current Workflow State of the Problem.</p>   |
| Next Action     | <p>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.</p>   |
| Status Due      | <p>Details the expiry time for the current Workflow State if the State has an OLA assigned.</p>   |
| 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>  |
| Service Manager | <p>Displays the name of the Service Level Manager responsible for overseeing Requests related to the assigned service agreement.</p>  |

| Summary Tab   | Description   |
|---------------|---|
| Progress      | <p>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:</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> |
| 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.  |

## 4.3 Change

- ◆ [Change Overview](#)
- ◆ [Section 4.3.1, “Change Requests,” on page 998](#)
- ◆ [Section 4.3.2, “RFC Approval Process,” on page 1002](#)
- ◆ [Section 4.3.3, “Releases,” on page 1005](#)
- ◆ [Section 4.3.4, “Deployments,” on page 1005](#)
- ◆ [Section 4.3.5, “Deployment Tasks,” on page 1005](#)

### 4.3.1 Change Requests

- ◆ [“Change Request Search Tips” on page 999](#)
- ◆ [“Viewing Change Request Information:” on page 999](#)



Manager access provides a *read only* view of Change Requests logged with the application.

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.  |
| 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.

## Change Request Search Tips





- ◆ Note 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 will be displayed
- ◆ To search by Classification, select an Item Category from the Category drop-down list. After the category is chosen, a list of Classifications are displayed
- ◆ To search based on the content of an RFC 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 enable for that Item.


## Viewing Change Request Information:





To view RFC details, select the relevant RFC Reference # hyperlink and the screen will default to the Summary tab. The Summary tab provides comprehensive details related to the RFC.

The summary information includes the following:

| Summary Tab | Description  |
|-------------|--|
| Contact     | <p>Displays the Customer assigned to the RFC and their contact information. Click on the Customer Name or Org.Unit link for more details relating to Customer and Org Unit.</p> <p>To update the Customer details assigned to the request, click on the Customer tab and ensure the Request is in edit mode.</p> |

| Summary Tab      | Description  |
|------------------|--|
| Item             | <p>Displays the Item assigned to the RFC. Scroll over  to view Item information recorded on the Details tab. Select the Type hyperlink for more information about the Item.</p> <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> 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.</p> <p> 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.</p> |
| Details          |  |
| Classification   | <p>Displays the RFC Classification that was selected when the Change Request was created. This can be updated, if required.</p>  |
| Priority         | <p>Shows the Priority of the RFC, which determines the Service Level triggers applied to the Request.</p> <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 Change Request to alter the Priority assigned.</p>   |
| Escalation       | <p>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.</p>   |
| Escalation Layer | <p>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.</p>   |
| Technician       | <p>The name of the Technician assigned to the RFC.</p>   |
| Notification     |  |

| Summary Tab    | Description  |
|----------------|--|
| Customer       | <p>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.</p> <p><i>Customer CCs</i> is a free text field for any additional notification recipients, these can be divided into Customer and Technician CC lists.</p>  |
| Technician     | <p>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.</p> <p><i>Technician CCs</i> is a free text field for any additional notification recipients, these can be divided into Customer and Technician CC lists.</p>  |
| Alternate Team | <p>Is visible if the Notify Alternate Team option is enabled in the Admin&gt;Email&gt;Setup tab. This allows the User to define another Team to be notified about updates regarding the RFC.</p>   |
| Change Request |  |
| Team           | <p>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.</p>  |
| Workflow       | <p>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.</p> <p>Select  to view the Workflow in its entirety.</p>  |
| Status         | <p>Shows the current Workflow State of the RFC.</p>  |
| Next Action    | <p>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.</p> <p>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.</p> |
| Status Due     | <p>Details the expiry time for the current Workflow State if the State has an OLA assigned.</p>  |
| Service Terms  |  |

| Summary Tab     | Description   |
|-----------------|---|
| 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        | <p>Visually displays how the RFC 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:</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> |
| 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.  |

## 4.3.2 RFC Approval Process

- ♦ [“Accept or Reject an RFC via the application” on page 1003](#)
- ♦ [“Accept or Reject an RFC via email” on page 1004](#)

As part of the Change Management approval process, Users that have a Manager Role and are assigned to a Change Management Team can approve or reject Change Requests. To allow a Manager to approve an RFC they must be assigned to the Change Workflow Approval State. (See:[Change Teams](#).) Then, when an RFC is moved into an Approval state, the Manager is assigned the RFC allowing them to view and reject or accept the RFC.

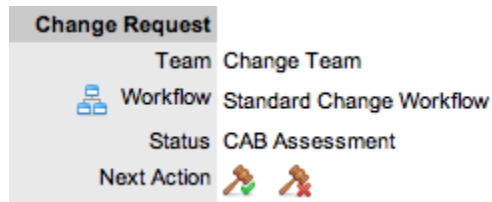
The security of the approval process can be enhanced by forcing the assigned Manager to re-enter their User Name and Password when processing a request. This is achieved by enabling the Strong Authentication option for the Team. (See: [Change Teams](#).)

The system allows Managers to approve an RFC via the application's interface and email.



## Accept or Reject an RFC via the application

1. Select the Change tab
2. Select the filter option Pending Approvals  
From the list provided select a Request ID hyperlink.
3. Click Edit


The Accept and Reject will be available to process the RFC.



4. Select the Next Action option

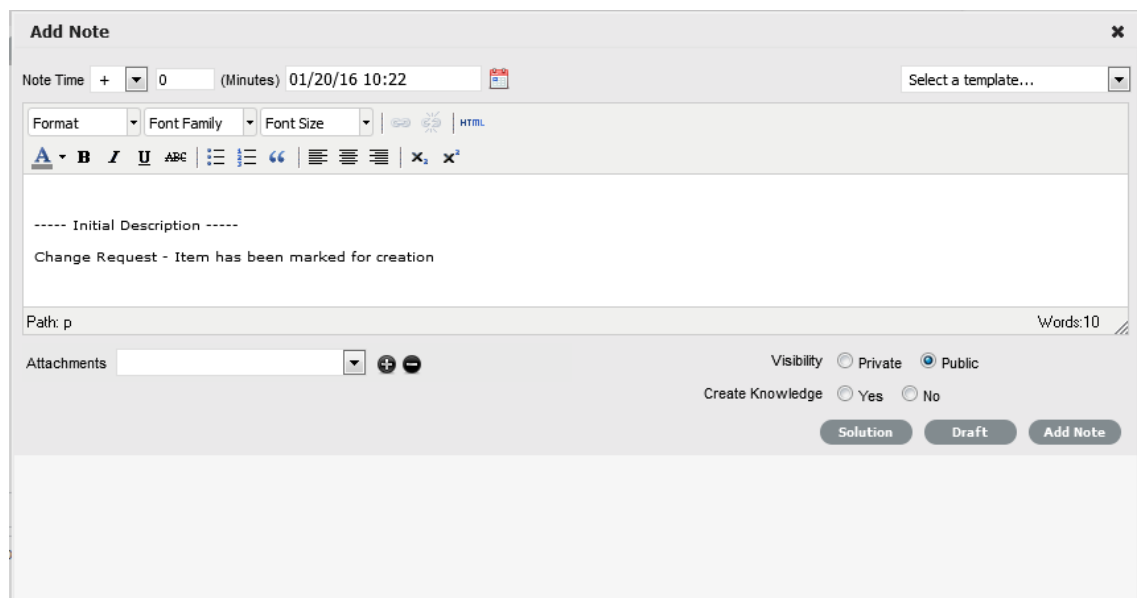
Click Accept () or Reject () button to move the Change Request into the relevant pre-defined state and re-assign the RFC to a Technician allocated to the Status.

5. Enter Authentication details, if prompted

When the Strong Authentication option is enabled for the Change Team associated with the request, an Approve Change Request window is displayed prompting the User to enter their Password details. Enter your Password and select the Authenticate button and click  to close the pop-up window.

6. Enter additional details in the Notes Tab, if relevant

A Notes window is displayed to allow the Manager to add detailed information regarding the approval option selected.

A screenshot of the 'Add Note' dialog box. The dialog has a title bar with 'Add Note' and a close button. It contains a 'Note Time' field with a plus sign, a dropdown arrow, and the value '0 (Minutes) 01/20/16 10:22'. There is a 'Select a template...' dropdown. Below is a rich text editor with a 'Format' dropdown, 'Font Family', 'Font Size', and 'HTML' options. The editor contains the text '----- Initial Description -----' and 'Change Request - Item has been marked for creation'. At the bottom, there is a 'Path: p' field, an 'Attachments' field with a dropdown and plus/minus buttons, 'Visibility' options (Private and Public, with Public selected), and 'Create Knowledge' options (Yes and No, with No selected). There are three buttons at the bottom: 'Solution', 'Draft', and 'Add Note'.

7. Click Add Note.

Note that the Manager User will no longer be able to edit the RFC after the selection is made, and the RFC will continue through the RFC Workflow lifecycle.

---

**NOTE:** If the Approval State is configured to be an Item Details Editable State, the Manager can amend the Item details when the RFC is in this State.

---

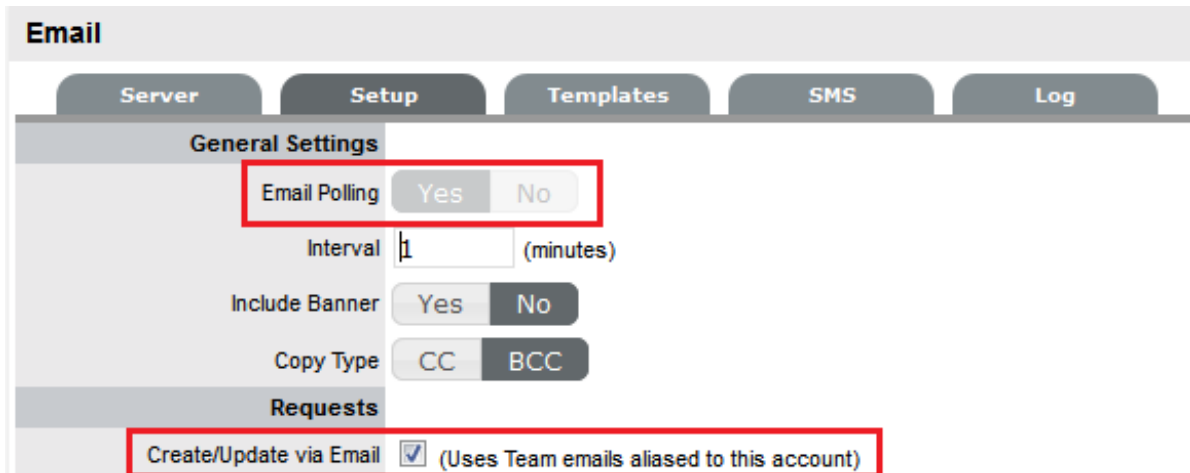
## Accept or Reject an RFC via email

To use the Manager RFC approval process via email, the following configuration must be in place:

The Administrator must configure the system Setup>Email screens to include:

- ◆ Email Polling functionality
- ◆ Create Incidents via Email option
- ◆ Customise the ApproveChange email content, as required.

The Supervisor must also include an incoming email address for the Change Team.



**Email**

Server Setup Templates SMS Log

**General Settings**

Email Polling Yes No

Interval 1 (minutes)

Include Banner Yes No

Copy Type CC BCC

**Requests**

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

When an RFC is escalated to a Change Approval state, an email is sent to the assigned Manager User informing them that an RFC is pending approval. The Manager can approve or reject the Change Request by simply replying to the escalation email using the words Accept /Yes or Reject/No.

When the system polls for incoming email, the Manager's response is automatically applied to the relevant RFC and based on the Manager's response, the RFC is routed to a Technician allocated to the next Workflow state. The Manager is also sent a confirmation email informing them that their selected action has been applied to the RFC.

Example of email sent to Manager:



This RFC is pending your approval.

Please access the Service Desk to approve the RFC manually.

Alternatively, you may reply to this email:

To Accept the RFC, include the words 'accept' or 'yes'.

To Reject the RFC, include the words 'reject' or 'no'.

| Change Request Information |                                      |
|----------------------------|--------------------------------------|
| <b>Change Request #:</b>   | 100135                               |
| <b>Date Opened:</b>        | 02/01/08 16:27 (mm/dd/yy hh:mm)      |
| <b>Classification:</b>     | Downloads                            |
| <b>Technician:</b>         | Manager User                         |
| <b>Item #:</b>             | 100203                               |
| <b>Item Type:</b>          | Service Desk                         |
| <b>Identifier:</b>         |                                      |
| <b>Customer:</b>           | dan springer                         |
| <b>Org Unit:</b>           |                                      |
| <b>Country:</b>            |                                      |
| <b>Due Date:</b>           | 02/01/08 16:57                       |
| <b>Description:</b>        | Request to update to Microsoft Vista |

### 4.3.3 Releases

- ♦ [Release and Deployment Management](#)
- ♦ [Releases](#)
- ♦ [Release Management Applied](#)

### 4.3.4 Deployments

- ♦ [Deployments](#)

### 4.3.5 Deployment Tasks

- ♦ [Deployment Tasks](#)

## 4.4 Service

- ◆ [Service Level Management](#)
- ◆ [Section 4.4.1, “Service,” on page 1006](#)
- ◆ [Section 4.4.2, “Assigning an SLA,” on page 1006](#)

### 4.4.1 Service

- ◆ [SLAs Tab](#)
- ◆ [OLAs Tab](#)
- ◆ [Underpinning Contracts Tab](#)

#### Workflows

- ◆ [Incident and Problem Workflows](#)
- ◆ [Request & Change Workflows](#)
- ◆ [Release Workflow](#)
- ◆ [Status Notes](#)
- ◆ [Breach Codes Tab](#)

### 4.4.2 Assigning an SLA

- ◆ [“Assigning an SLA to a Customer” on page 1007](#)
- ◆ [“Assigning an SLA to an Organizational Unit” on page 1007](#)

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:

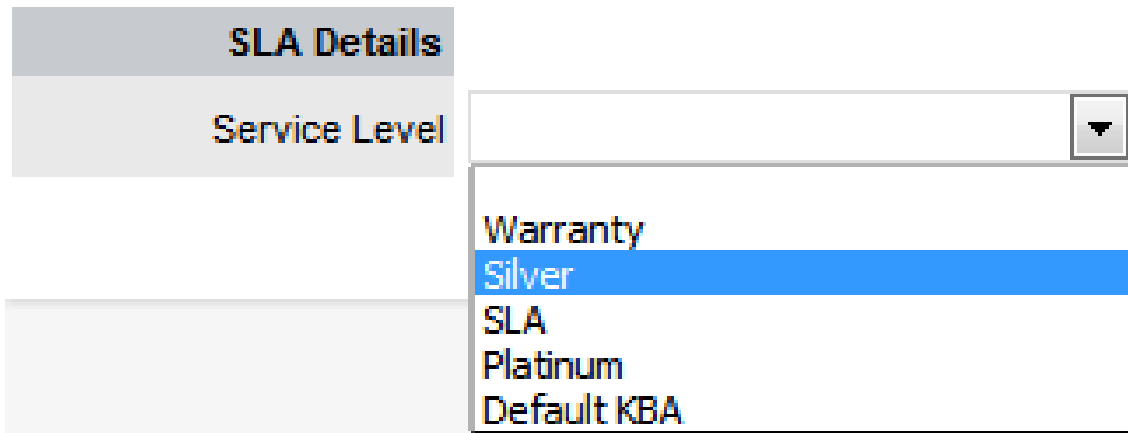
1. If the Customer has an SLA then assign this to the request
2. If the Customer does not have an SLA but the Organizational Unit does, assign this to the request
3. If the Customer or Organizational Unit does not have an SLA but the Item does, then assign this to the request
4. If none of the above 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

The screenshot shows the 'Org. Unit Information' form. At the top, there are tabs for 'Details', 'Customers', 'Technicians', 'Departments', 'Items', 'Requests', and 'Contracts'. Below these is a 'Micro Focus' label. The 'SLA Details' section is active, showing a 'Service Level' dropdown menu. The dropdown is open, displaying the following options: 'Warranty', 'Silver' (which is highlighted in blue), 'SLA', 'Platinum', and 'Default KBA'. At the bottom right of the form, there are 'Cancel' and 'Save' buttons.

6. Select Save.

## 4.5 User

- ♦ [List View Options: Users Tab](#)
- ♦ [Customers](#)
- ♦ [Organizational Units](#)

## 4.6 Knowledge

- ♦ [Articles](#)
- ♦ [FAQs](#)
- ♦ [Article Groups](#)
- ♦ [Surveys](#)

## 4.7 Reports

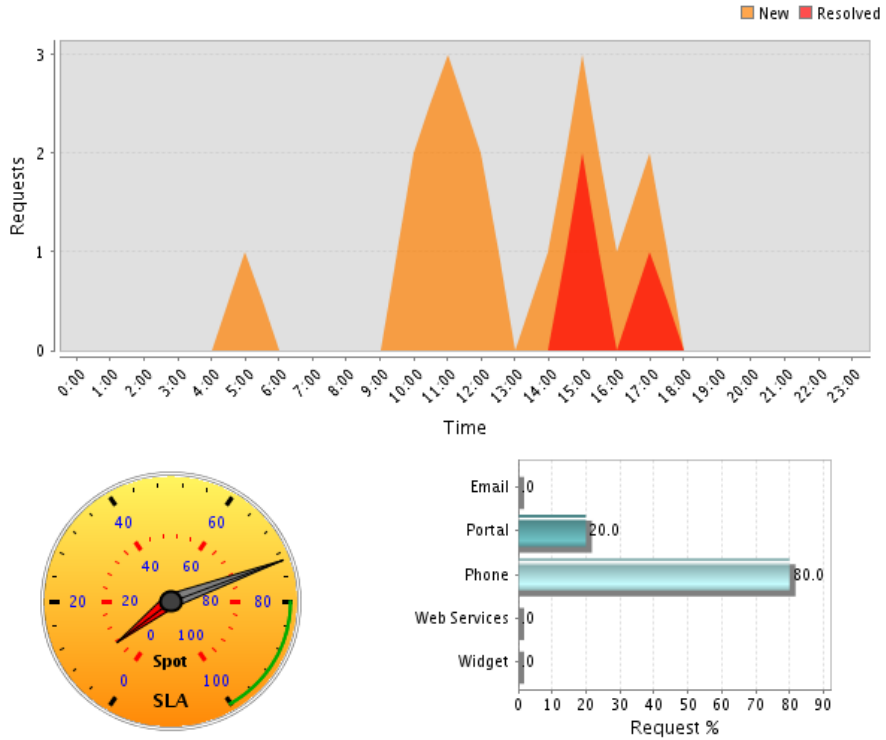


Online reporting provides Manager Users with a graphical snapshot of the overall performance of the Service Desk and its Users. The real-time Reports Module delivers easy access, and on-demand visual feedback that can be exported to Excel and PDF format.

### 4.7.1 Create a Report

1. Select Reports> Report Type (e.g. Incident) sub-menu option
2. Select a Process, if relevant
3. Use the drop-down list to select the report required
4. Enter the date range, if applicable
  - The default Start Date is the last day of the previous month.
5. Refine parameters, if required
6. Click Create to generate the report.

### Incident Summary: 01/01/16 to 01/19/16



**NOTE:** The results are displayed as a chart and as a text table. They both can be exported as an Excel spreadsheet or as a PDF document.

## 4.7.2 Trend Reports

A Trend Report allows data to be compared over time to monitor patterns. This type of report is only available for Incident, Problem, Service and Change Requests.

To create a Trend report:

1. Select Reports> Report Type (e.g. Incident) sub-menu option
2. Use the drop-down list to select the required report
3. Select the Trend checkbox

**Incident Reports**

Process: Incident Reports

Report Type: Open Incidents by Priority

Start Date (mm/dd/yy): 01/01/16

End Date (mm/dd/yy): 01/19/16

Trend:  Day

Day  
3 Days  
Week  
Fornight  
Month

Create

- If the trend data is available for the selected report, a drop-down field appears. Select a period for the data:

---

**Date Ranges for Trend reports:**

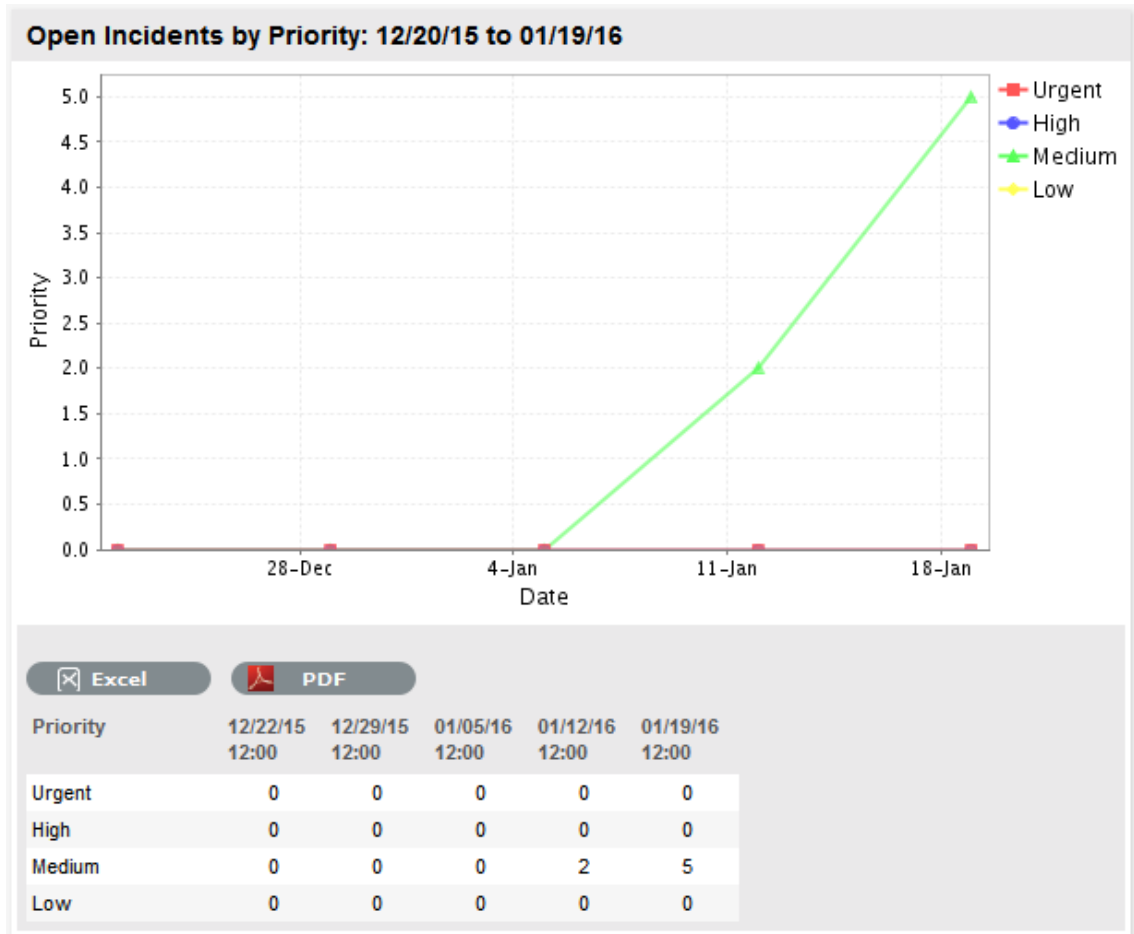
---

|           |                           |
|-----------|---------------------------|
| Day       | Up to 14 days.            |
| 3 Days    | Up to 30 days.            |
| Week      | Up to at least 10 weeks.  |
| Fortnight | Up to at least 10 weeks.  |
| Month     | Up to at least 12 months. |

---

- For Start Date, enter the start date or click on the calendar icon to define it within the calendar
- Enter the End Date or select it from the calendar

7. Click Create.



### 4.7.3 Requests

- ◆ [Service Request Reports](#)
- ◆ [Incident Reports](#)
- ◆ [Problem Reports](#)
- ◆ [Change Request Reports](#)
- ◆ [Service Agreements](#)
- ◆ [Organization](#)
- ◆ [Technician](#)
- ◆ [Knowledge](#)
- ◆ [Financial](#)
- ◆ [Builder](#)
- ◆ [Login](#)





# 5 Finance Guide

- ◆ Financial Management
- ◆ Financial Management Applied
- ◆ Section 5.1, “Home,” on page 1013
- ◆ Section 5.2, “Configuration,” on page 1014
- ◆ Section 5.3, “Service,” on page 1035
- ◆ Section 5.4, “User,” on page 1046
- ◆ Section 5.5, “Reports,” on page 1046
- ◆ Section 5.6, “Finance,” on page 1052

## 5.1 Home

- ◆ Section 5.1.1, “Finance Role,” on page 1013



When a Finance User selects the Home tab the system defaults to the My Account screen. Within this tab, personal account information can be accessed and modified.

The Home tab gives access to the following tabs:

- ◆ [My Account](#) - Allows the User to edit their personal information, including password resets, if enabled, and set their time zone
- ◆ [Feedback](#) - Allows the User to access published Surveys that are ready for completion.

### 5.1.1 Finance Role

Users with the Finance Role can only be assigned the Configuration and Service Level Management Processes. The Finance Role primarily drives the service costing models and, if relevant, maintains 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 Finance User is the only User with the privilege to process the payment of Invoices. The Invoice option must be enabled by the Administrator within the Billing Setup, for this privilege to become available.

---

- ◆ [My Account](#)
- ◆ [Feedback](#)

## 5.2 Configuration

- ◆ [Configuration Management](#)
- ◆ [Service Catalog](#)
- ◆ [Section 5.2.1, “Items,” on page 1014](#)

### 5.2.1 Items

- ◆ [“View an Item” on page 1016](#)
- ◆ [“Item Information” on page 1016](#)
- ◆ [“Details” on page 1020](#)
- ◆ [“Item Notes” on page 1021](#)
- ◆ [“Costs” on page 1023](#)
- ◆ [“Requests” on page 1028](#)
- ◆ [“Item Relationships” on page 1029](#)
- ◆ [“Outages” on page 1032](#)



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. See <a href="#">Creating Items</a> . |

| Element                         | Relationship   |
|---------------------------------|--|
| Service Level Agreements (SLAs) | Service Level Agreements can be linked as follows: <ul style="list-style-type: none"> <li>◆ Per Item</li> <li>◆ Per Customer</li> <li>◆ Per Request</li> <li>◆ or to an Organizational Unit.</li> </ul>  |
| 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. See <a href="#">Classification Tab</a> . |
| 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. See <a href="#">Categories LifeCycle</a> .  |

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 the ownership of Items in a bulk lot.

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. |

| <b>Filter</b>     | <b>Relationship</b>   |
|-------------------|---|
| 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.

## Item Information

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 Everybody

Org. Units All

Affects **13 Users**

\*Denotes mandatory fields.

| Item         | Description  |
|--------------|--|
| Item Number* | <p>If the Administrator has set the Item Numbers Editable option in Setup&gt; Privileges&gt; 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.   |

| Item          | Description  |
|---------------|--|
| 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     | <p data-bbox="894 722 1438 842">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 data-bbox="915 863 1422 1058" style="list-style-type: none"> <li data-bbox="915 863 1422 951">1. Enter a Customer last name, or leave blank then click the Search button to view a list of all available Customers.</li> <li data-bbox="915 972 1422 1058">2. Click on the hyperlink for the relevant Customer name or names to assign them to the Item.</li> </ol> <p data-bbox="894 1085 1438 1142">If no specific Customer is allocated to the Item, it becomes a Global Item and is assigned to Everyone.</p>  |
| Customers     |  |
| Org Units     | <p data-bbox="894 1169 1438 1260">These are the Org Units who own the Item. The Item can be assigned to one or multiple Organizational Units.</p> <p data-bbox="894 1287 1127 1314">To assign an Org Unit:</p> <ol data-bbox="915 1335 1422 1530" style="list-style-type: none"> <li data-bbox="915 1335 1422 1423">1. Enter an Org Unit name, or leave blank then click the Search button to view a list of available Org Units.</li> <li data-bbox="915 1444 1422 1530">2. Click on the hyperlink for the relevant Org Unit name or names to assign them to the Item.</li> </ol> <p data-bbox="948 1551 1438 1730"><b>NOTE:</b> 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: <a href="#">Primary Contact</a>.)</p> |
| Notification  |  |

| Item   | Description  |
|--------|--|
| Method | 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. |

3. Search and select an Item Type

4. Select 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.

## 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](#).

The screenshot shows the 'Item Information' form with the 'Details' tab selected. The form has a header with tabs for Information, Details, Costs, Requests, Relationships, Outages, and AMIE Snapshots. Below the tabs are buttons for Edit, Duplicate, and Print. The 'Item # Service Desk (Service Desk)' is displayed in the top right. The 'Details' section contains two columns of fields: Business Unit, Type, Environment on the left; and Date Responsible, Date Activated, Contact on the right. Below these are tabs for Description, Notes, Attachments, and Audit Trail. The 'Description' field is active and contains the text: 'Description entered here is displayed in the customer portal.' A 'Done' button is located at the bottom right of the form.

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).

---

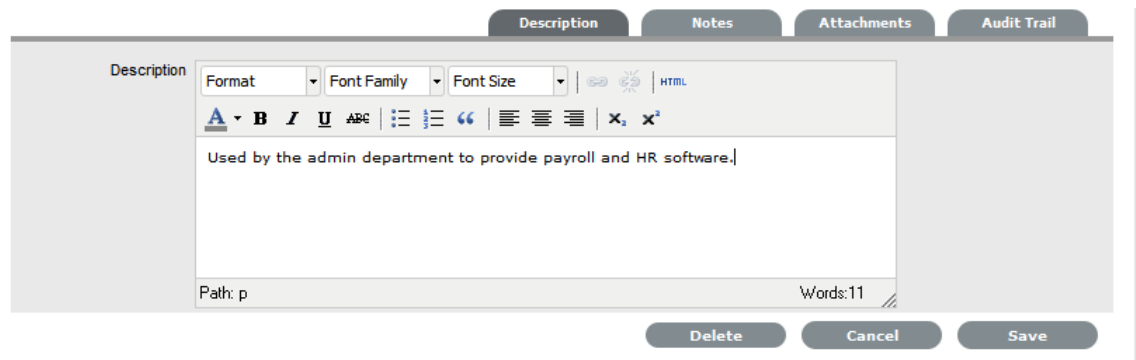


## Item Description

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



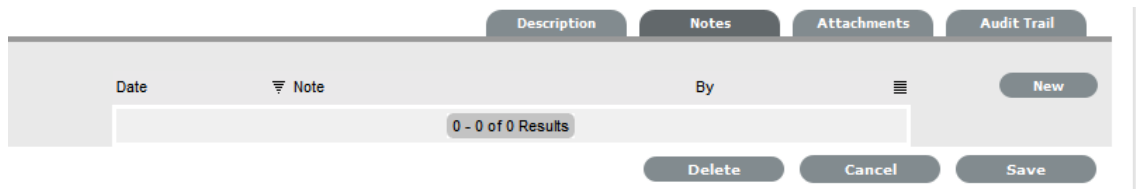
The screenshot shows the 'Description' tab selected in a tabbed interface. The 'Description' field is active, displaying a rich text editor with a toolbar containing options for Format, Font Family, Font Size, and HTML. The text area contains the text 'Used by the admin department to provide payroll and HR software.' Below the text area, the path is shown as 'Path: p' and the word count is 'Words:11'. At the bottom right, there are three buttons: 'Delete', 'Cancel', and 'Save'.

4. Click Save.

## Item Notes

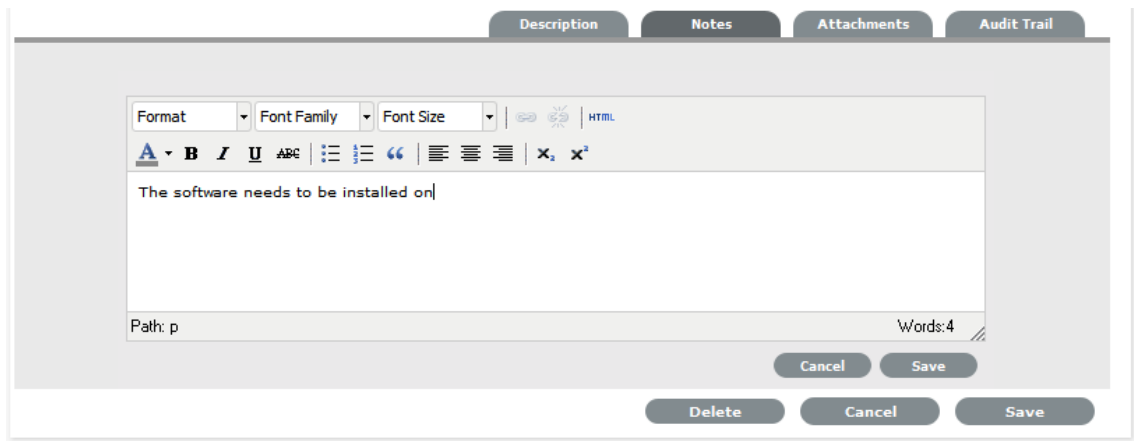
To add Notes to an Item, under the Item's Details tab:

1. Click Edit
2. Select the Notes tab



The screenshot shows the 'Notes' tab selected in a tabbed interface. The interface displays a table with columns for 'Date', 'Note', and 'By'. A search bar is present with the text '0 - 0 of 0 Results'. At the bottom right, there are three buttons: 'Delete', 'Cancel', and 'Save'. A 'New' button is also visible in the top right corner of the table area.

3. Click New
4. Enter details in the Notes field



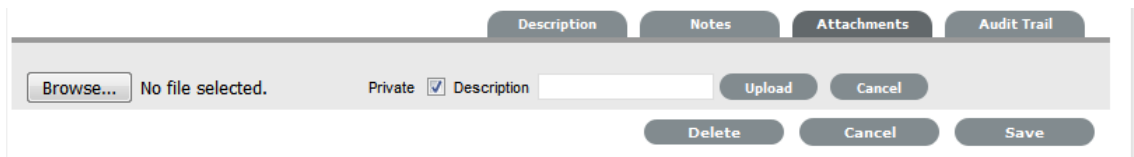
5. Click Save.

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.

| Description |                |   |          | Notes | Attachments | Audit Trail |
|-------------|----------------|---|----------|-------|-------------|-------------|
| 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

## 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

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.

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    |
|--------------------------------------|----------------|------------|-----------|
| <a href="#">jdk-7u60-windows-x64</a> | Windows Bundle |            | Installed |
| <a href="#">Wordweb7</a>             | Windows Bundle |            | Installed |
| <a href="#">Firefox 1.0</a>          | 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 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. |

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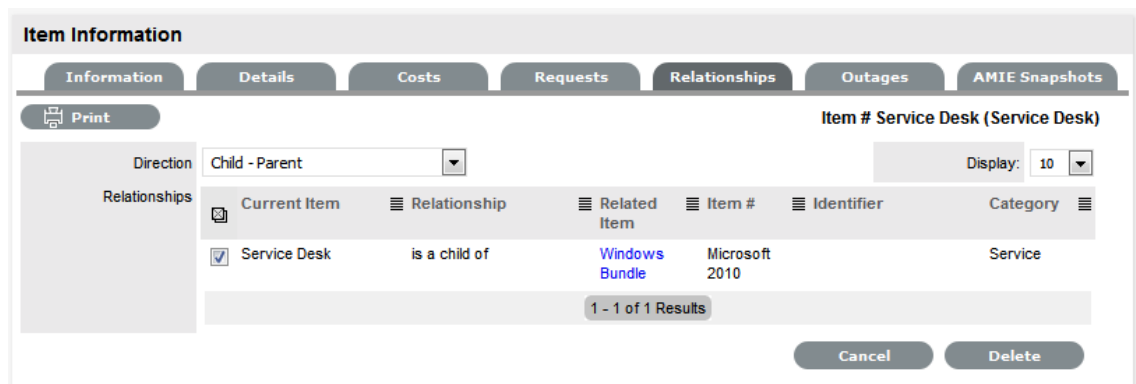
The Lifecycle State name can be accessed by scrolling over the Item icon within the Map.

## 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.



The screenshot shows the 'Item Information' interface with the 'Relationships' tab selected. The 'Direction' is set to 'Child - Parent'. A table displays the following relationship:

| Current Item                                     | Relationship  | Related Item   | Item #         | Identifier | Category |
|--|---------------|----------------|----------------|------------|----------|
| <input checked="" type="checkbox"/> Service Desk | is a child of | Windows Bundle | Microsoft 2010 |            | Service  |

At the bottom of the table, it indicates '1 - 1 of 1 Results'. There are 'Cancel' and 'Delete' buttons at the bottom right of the interface.

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

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

**Item Information**

Information Details Costs Requests Relationships Outages AMIE Snapshots

New Item Number 1000 (WIFI Service)

| No.                | Start Date | End Date | Reason | By |
|--------------------|------------|----------|--------|----|
| 0 - 0 of 0 Results |            |          |        |    |

Cancel Save

5. Click New

**Item Information**

Information Details Costs Requests Relationships Outages AMIE Snapshots

**Details**

Interval: One Time

Start Date: [ ] [ ]

End Date: [ ] [ ]

Notification: None

Offline Status: Offline

Online Status: Deployed

Reason: [ ]

Cancel Save

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.

---

---

## Planned Outages

---

|              |  |
|--------------|--|
| 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     | <p>This option is displayed when a Notification is set for the Outage.</p> <p>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.</p> |
| 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: the first is set to 'Email' and the second is set to 'Primary Contacts'. The second row is labeled 'Reminder' and has a checked checkbox, a dropdown menu set to '24 hours', and the text '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.

See [Outages](#) for more information on setting up and viewing Item Outages.

- ◆ [Types Tab](#)
- ◆ [Vendors](#)
- ◆ [Manufacturers](#)
- ◆ [Outages](#)

## 5.3 Service

- ◆ [Service Level Management](#)
- ◆ [Section 5.3.1, “Service Level Agreements \(SLAs\),” on page 1035](#)
- ◆ [Section 5.3.2, “Contracts,” on page 1046](#)

### 5.3.1 Service Level Agreements (SLAs)



Service Level Agreements (SLAs) are used by organizations to manage the level of service expected of IT and to ensure optimal maintenance of critical business systems. SLAs are documents that are negotiated between IT and Customer departments, to identify expectations and clarify responsibilities.

This tab is used to create and modify Service Level Agreements that provide service request management capabilities.

SLAs include the following elements:

- ◆ Notifications
- ◆ Targets
- ◆ 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.

The screenshot shows the SLA Editor interface with the following sections and fields:

- Details:** Name (text input), On Breach (checkbox), cc Team Leader (checkbox), Pause on Holiday (checkbox), Customer Timezone (checkbox), Timezone (dropdown menu showing "(GMT +5:30) New Delhi").
- Requirements:** Availability (97.0 % Uptime), Interval Measured in (text input) Days.
- Internal Costs:** Annual Cost (0.00), Request Cost (0.00), Hourly Cost (0.00).
- Customer Prices:** Annual Price (0.00), Request Price (0.00), Hourly Price (0.00).
- Find Service Level Manager:** First Name, Email, Last Name, Phone (text inputs).
- Buttons:** Cancel, Next.

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 RFC Alert field in Admin>Setup>Privileges>Requests. |
| Pricing ^        |   |
| Annual Price ^   | Indicates the cost applied on an Annual basis. This price is used within Items to calculate the cost of supplying services.   |
| Incident Price ^ | Indicates the cost applied on a Per Incident basis.   |
| Hourly Price ^   | Indicates the cost applied on an Hourly basis.  |
| On Warning       | Notification can be set to Carbon Copy (CC) an email to the Team Leader when the Warning time is breached.  |



---

## SLA Editor

---

|                              |  |
|------------------------------|--|
| On Breach                    | An email can also be sent to the Team Leader when an Escalation Time period is Breached.   |
| Pause on Holiday             | <p>**This option is only displayed if the Observe Public Holidays option has been enabled within the Administrator&gt;Setup&gt;Privileges&gt;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&gt;Setup&gt;Public Holidays screen.</p> |
| Customer Timezone            | When enabled, SLA times displayed within the Technician request view uses the customer timezone.   |
| 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 __ Days | Defines the number of days over which the Availability requirement is calculated.  |
| 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                        | This is also the Service Desk User who is assigned responsibility for managing the performance of external support providers who are forwarded Service Requests assigned with this SLA .   |
| 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>                                   |

---

\* Denotes a mandatory field

^ Only applicable when billing is enabled

## 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

Select Common if the SLA is to apply across Incidents, Requests, Problems and Change Management. 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

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.

---

---

## SLA Editor

---

|                   |   |
|-------------------|---|
| 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.  |
| 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

The screenshot shows the SLA Editor interface with the 'Details' tab selected. The 'Targets' section has 'Common' selected. The 'Interval' section has 'Hours' selected. Below is a table for 'Service Time' with columns for 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  |

Buttons: Cancel, Next

#### 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 the following:

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.

---

**NOTE:** 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.

---

1. 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.

2. 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

3. Click Save
4. 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 OLA support hours:

1. Select Service > SLAs
2. Select an SLA
3. Select a Priority link

This will display the Detail tab with Support Hours options of 24x7 and Normal.

The screenshot shows the 'SLA Editor' interface with four tabs: 'Details', 'Targets', 'Blackouts', and 'Workflows'. The 'Details' tab is active. On the left, under 'Milestones', 'Initial Response' is 12 hours, 'Restoration Time' is 24 hours, and 'Resolution Time' is 48 hours. 'Notify Override' is unchecked and 'Notification Type' is 'None'. Under 'Alerts', there is a plus icon. On the right, the 'Support' section has '24 x 7' selected and 'Normal Support' selected. Below this, 'Hours' and 'Apply Template' are shown. A 'Weekdays' dropdown menu is open, showing 'Weekdays 8 to 5' and 'Weekdays 9 to 5'. Below this, a table shows support hours for each day: Monday through Friday are 08:00 to 17:00, and Saturday and Sunday are '<closed>'. 'Cancel' and 'Save' buttons are at the bottom right.

4. The default setting is 24 X 7, to amend the support hours select the Normal Support option
5. Use the drop-down lists to customize the available support hours for each day

Note that the SLA timers become inactive when the support desk is closed.

6. Click Save.

## Blackouts

Blackouts are used as part of Change Management to advise Users about the time periods an Item using the SLA should be scheduled to be taken off-line if an Outage is necessary. When scheduling an Outage (Item>Details>Outages) the Blackout times are displayed advising the User of the best Planned Outage times.

After the option has been checked, use the dropdown lists to specify change windows.

A 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.


A Blackout Period is specified within an SLA. During this period, the SLA is seen to be inactive and its timers have stopped. OLAs that underpin a Workflow State that uses an SLA with a Blackout Period, will also adopt the Blackout Period.

### Specifying a SLA Blackout

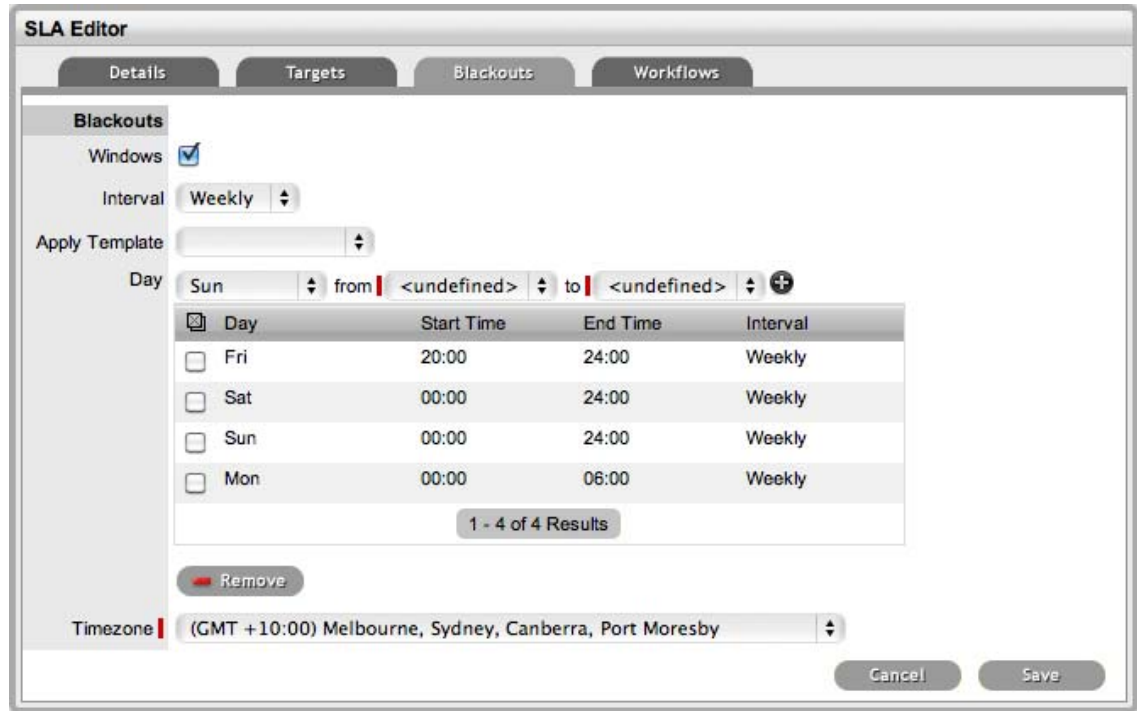
To specify a SLA Blackout:

1. Select Service >SLAs
2. Click a SLA hyperlink
3. Click Edit
4. Move to the Blackouts tab
5. Tick the Windows option

The screenshot shows the 'SLA Editor' interface with the 'Blackouts' tab selected. The 'Blackouts' section is active, and the 'Windows' checkbox is checked. Below it, there is an 'Interval' dropdown menu and a 'Day' section. The 'Day' section contains a table with columns for 'Day', 'Start Time', 'End Time', and 'Interval'. The table is currently empty, and a 'Remove' button is visible below it. At the bottom of the interface, there are 'Cancel' and 'Next' buttons.

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.

See: [Item Planned Outages using Blackout Periods](#)

To remove time-frames from the Blackout Period:

1. Select Service >SLAs
2. Click a 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



6. Click Remove.

## Assigning a Workflow

To assign a Workflow:

1. Select Service>SLAs
2. Click the relevant SLA link
3. Move to the Workflows tab

**Workflow - Problem Workflow**

**Workflow** Lifecycle

Duplicate

Workflow Name | Problem Workflow

Process | Problem

Default Open Status | Pending

Default Closed Status | Closed - Resolved

Note Action |  Do nothing  Update status

SLA

Find SLA (Name)

SLA

Warranty

1 - 1 of 1 Results

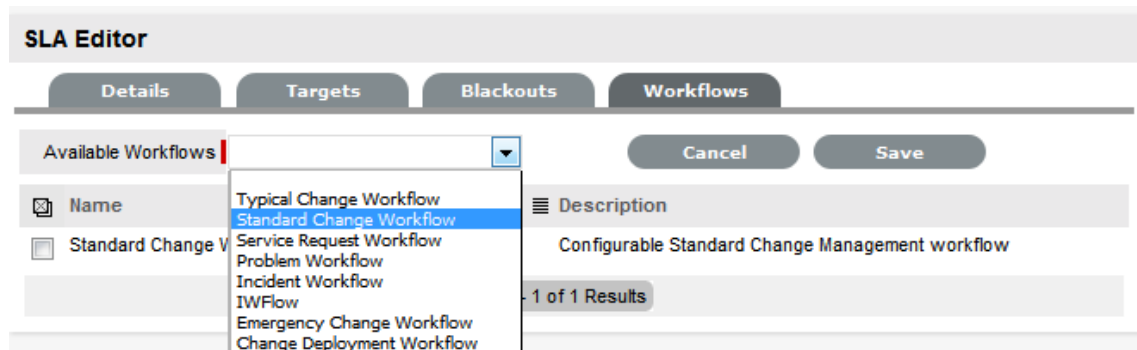
Description | Configurable Problem Management workflow

Cancel Save

4. Select Add

The Available Workflow drop-down list will be displayed.





5. Select a Workflow
6. 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 Incident 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 Incident creation process. Incidents 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 Incident can exist in the system.

See: [Assigning an SLA to a Customer](#)

See: [Assigning an SLA to an Organizational Unit when Contracts are Disabled](#)

- ♦ [OLAs Tab](#)
- ♦ [Underpinning Contracts Tab](#)

## Workflows

- ♦ [Incident and Problem Workflows](#)
- ♦ [Change Workflows](#)
- ♦ [Release Workflow](#)
- ♦ [Breach Codes](#)
- ♦ [Assigning an SLA](#)

## 5.3.2 Contracts

- ◆ [Contracts](#)
- ◆ [Contract Assignment](#)
- ◆ [Pending Contracts](#)

## 5.4 User

- ◆ [List View Options: Users Tab](#)
- ◆ [Customers](#)
- ◆ [Organizational Units](#)

## 5.5 Reports

### 5.5.1 Reports

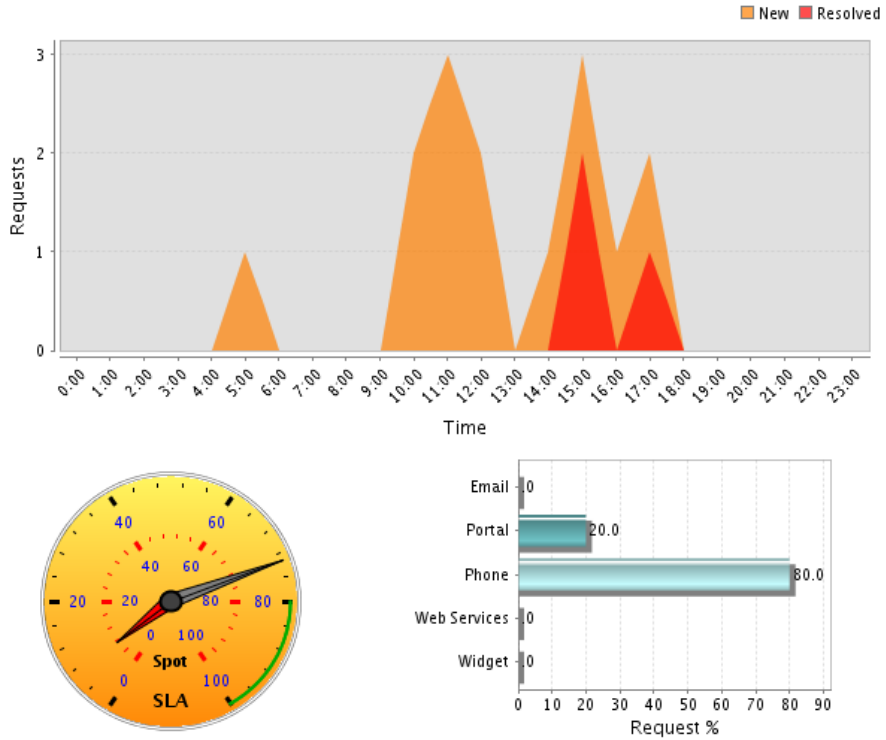


Online reporting provides Finance Users with a graphical snapshot of the overall performance of the Service Desk and its Users. The real-time Reports Module delivers easy access, and on-demand visual feedback that can be exported to Excel and PDF format.

### Create a Report

1. Select Reports> Report Type (e.g. Incident) sub-menu option
2. Select a Process, if relevant
3. Use the drop-down list to select the report required
4. Enter the date range, if applicable  
The default Start Date is the last day of the previous month.
5. Refine parameters, if required
6. Click Create to generate the report.

### Incident Summary: 01/01/16 to 01/19/16



**NOTE:** The results are displayed as a chart and as a text table. They both can be exported as an Excel spreadsheet or as a PDF document.

## Trend Reports

A Trend Report allows data to be compared over time to monitor patterns. This type of report is only available for Incident, Problem, Service and Change Requests.

To create a Trend report:

1. Select Reports> Report Type (e.g. Incident) sub-menu option
2. Use the drop-down list to select the required report
3. Select the Trend checkbox

**Incident Reports**

Process: Incident Reports

Report Type: Open Incidents by Priority

Start Date (mm/dd/yy): 01/01/16

End Date (mm/dd/yy): 01/19/16

Trend:  Day

Day  
3 Days  
Week  
Fornight  
Month

Create

- If the trend data is available for the selected report, a drop-down field appears. Select a period for the data:

---

**Date Ranges for Trend reports:**

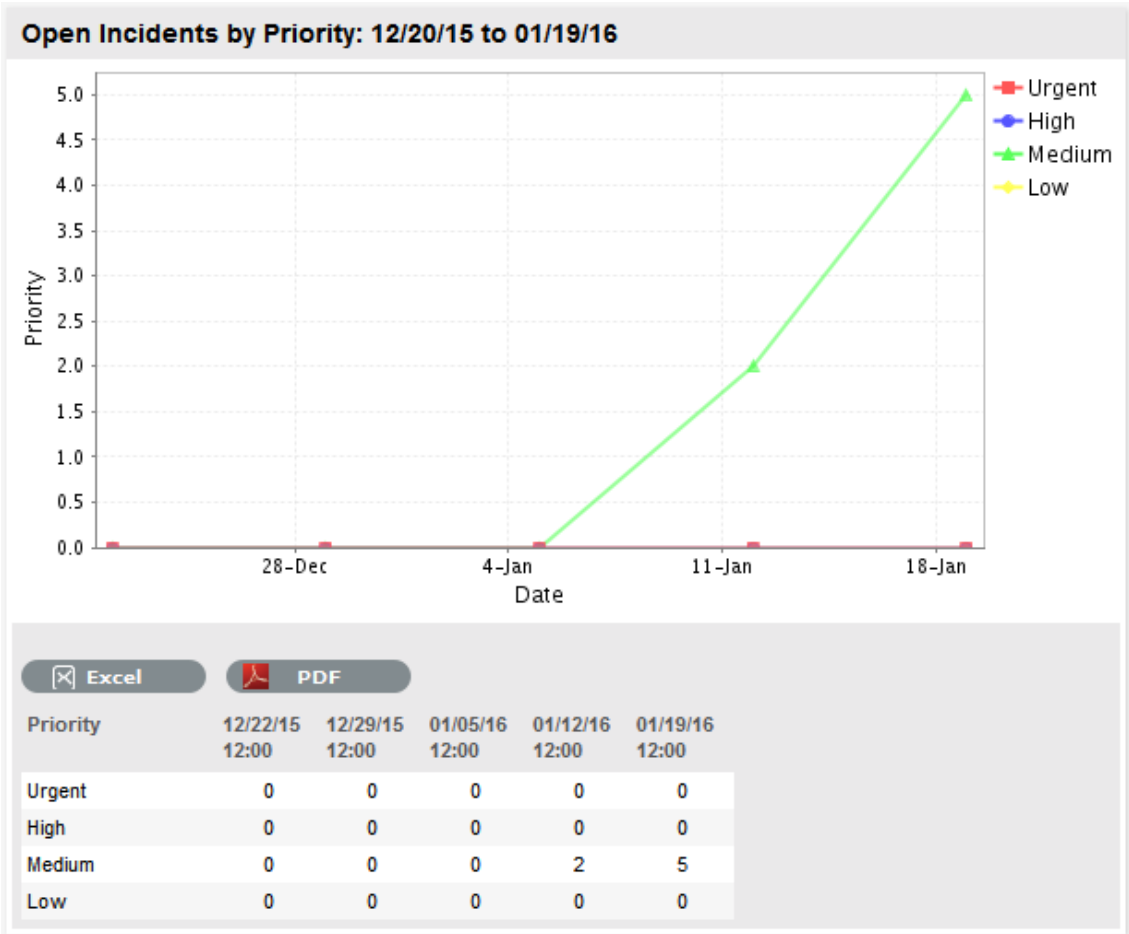
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|           |                           |
|-----------|---------------------------|
| Day       | Up to 14 days.            |
| 3 Days    | Up to 30 days.            |
| Week      | Up to at least 10 weeks.  |
| Fortnight | Up to at least 10 weeks.  |
| Month     | Up to at least 12 months. |

---

- For Start Date, enter the start date or click on the calendar icon to define it within the calendar
- Enter the End Date or select it from the calendar

7. Click Create.



### 5.5.2 Contract Reports

The following reports can be generated for Contracts:

| <b>Contract Reports</b>                               | <b>Description</b>  |
|---|---|
| Active Contracts by Service Provider (Summary)        | Derived by selecting a Service Provider, displays a summary of underpinning contracts currently being fulfilled.  |
| Active Contracts by Service Provider (Detailed)       | Derived by selecting a Service Provider, lists each current request covered by an underpinning contract with expected, actual and breached times recorded against Response, Restoration and Resolution times.   |
| Active Contracts by Service Manager (Summary)         | Derived by selecting a Service Manager, displays a summary of underpinning contracts currently being fulfilled.   |
| Active Contracts by Service Manager (Detailed)        | Derived by selecting a Service Manager, lists each current request covered by an underpinning contract with expected, actual and breached times recorded against Response, Restoration and Resolution times.    |
| Breached Underpinning Contracts by Resolution Time    | Lists each breached Underpinning Contract based on Resolution Time.   |
| Breached OLA Contracts by Resolution Time             | Lists each breached OLA based on Resolution Time.   |
| Incident Times by Service Provider                    | Derived by selecting a Service Provider, displays a summary of all Underpinning Contracts fulfilled.  |
| Incident Times by Underpinning Contract               | Derived by selecting an Underpinning Contract, displays each request covered by the underpinning contract with expected, actual and breached times recorded against Response, Restoration and Resolution times. |
| Incident Times by OLA                                 | Derived by selecting an OLA, displays each request covered by the OLA with expected, actual and breached times recorded against Response, Restoration and Resolution times.                                     |
| Mean Incident Contract Times by Underpinning Contract | Derived by selecting an Underpinning Contract, details the calculated average Response, Restore and Resolution time for each State assigned the Underpinning Contract.  |
| Mean Incident Contract Times by OLA                   | Derived by selecting an OLA, details the calculated average Response, Restore and Resolution time for each State assigned the OLA.  |
| Mean Incident Contract Times by Service Provider      | Derived by selecting a Service Provider, details the calculated average Response, Restore and Resolution time for the Vendor's Contract.  |
| Problem Times by Service Provider                     | Derived by selecting a Service Provider, displays a summary of all Underpinning Contracts fulfilled.  |

| <b>Contract Reports</b>                                     | <b>Description</b>   |
|---|--|
| Problem Times by Underpinning Contract                      | Derived by selecting an Underpinning Contract, displays each Problem covered by the Underpinning Contract with expected, actual and breached times recorded against Response, Restoration and Resolution times.        |
| Problem Times by OLA  | Derived by selecting an OLA, displays each Problem covered by the OLA with expected, actual and breached times recorded against Response, Restoration and Resolution times.  |
| Mean Problem Contract Times by Underpinning Contract        | Derived by selecting an Underpinning Contract, details the calculated average Response, Restore and Resolution time for each State assigned the Underpinning Contract.   |
| Mean Problem Contract Times by OLA                          | Derived by selecting an OLA, details the calculated average Response, Restore and Resolution time for each State assigned the OLA.   |
| Mean Problem Contract Times by Service Provider             | Derived by selecting a Service Provider, details the calculated average Response, Restore and Resolution time for the Vendor's Contract.   |
| Change Request Times by Service Provider                    | Derived by selecting a Service Provider, displays a summary of all Underpinning Contracts fulfilled.   |
| Change Request Times by Underpinning Contract               | Derived by selecting an Underpinning Contract, displays each Change Request covered by the underpinning contract with expected, actual and breached times recorded against Response, Restoration and Resolution times. |
| Change Request Times by OLA                                 | Derived by selecting an OLA, displays each Change Request covered by the OLA with expected, actual and breached times recorded against Response, Restoration and Resolution times.                                     |
| Mean Change Request Contract Times by Underpinning Contract | Derived by selecting an Underpinning Contract, details the calculated average Response, Restore and Resolution time for each State assigned the Underpinning Contract.   |
| Mean Change Request Contract Times by OLA                   | Derived by selecting an OLA, details the calculated average Response, Restore and Resolution time for each state assigned the OLA.   |
| Mean Change Request Contract Times by Service Provider      | Derived by selecting a Service Provider, details the calculated average Response, Restore and Resolution time for the Vendor's Contract.   |
| Service Request Times by Service Provider                   | Derived by selecting a Service Provider, displays a summary of all Underpinning Contracts fulfilled.   |

| Contract Reports   | Description   |
|--|---|
| Service Request Times by Underpinning Contract               | Derived by selecting an Underpinning Contract, displays each Service Request covered by the underpinning contract with expected, actual and breached times recorded against Response, Restoration and Resolution times. |
| Service Request Times by OLA                                 | Derived by selecting an OLA, displays each Change Request covered by the OLA with expected, actual and breached times recorded against Response, Restoration and Resolution times.                                      |
| Mean Service Request Contract Times by Underpinning Contract | Derived by selecting an Underpinning Contract, details the calculated average Response, Restore and Resolution time for each State assigned the Underpinning Contract.  |
| Mean Service Request Contract Times by OLA                   | Derived by selecting an OLA, details the calculated average Response, Restore and Resolution time for each State assigned the OLA.  |
| Mean Service Request Contract Times by Service Provider      | Derived by selecting a Service Provider, details the calculated average Response, Restore and Resolution time for the Vendor's Contract.  |

- ◆ [Financial](#)
- ◆ [Builder](#)

## 5.6 Finance

### 5.6.1 Invoices



The Invoices sub-menu option is available within the Finance tab when the option has been enabled by the system administrator. Invoices allows support organizations to charge Customers for support services provided, and manage Items purchased with Service Contracts.

(For more information about enabling Billing, see: Setup>Billing within the Administrator Guide.)

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 by the system through the following screens:

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



## Creating an Invoice to purchase an Item and Service Contract

To create an Invoice:

1. Select Finance>Invoices
2. Click New

The Customer tab appears.

3. Assign a Customer to the Invoice:

- a. To search for a Customer who already exists in the system

Enter any known information such as their First Name, Last Name, Email Address, Org. Unit or Username in the Find Customer fields. To view a list of all Customers in the database, leave all the fields blank.

The screenshot shows the 'Invoice Editor' window with four tabs: 'Customer', 'Items', 'Contract', and 'Summary'. The 'Customer' tab is active. On the left, there is a 'Contact' list with fields: Name, Email, Phone, Fax, Pager, Mobile, Org. Unit, Address 1, Address 2, City, State, Zip, and Country. Below this is a 'Delivery Details' section with a checked box for 'Use Customer Details'. On the right, the 'Find Customer' form has fields for First Name, Email, Last Name, Phone, Username, and Org. Unit. There is a checkbox for 'Supported Org. Units Only' and a search icon. At the bottom right are 'Cancel' and 'Next' buttons.

- b. Click 

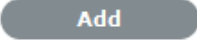
- c. Click on a Customer's name to assign them to the Invoice

The Delivery Details are automatically extracted from the Customer Details. If they are not the same, uncheck by clicking the tick in the Use Customer Details box and enter the correct details.

- d. Select Next to continue.

The system moves to the Items tab.

4. To add an Item Type for an Item Order:

- a. Select  if the Invoice is to purchase a new Item

Otherwise, click Next to purchase a Service Contract.

- b. Search for the Item Type to be associated with the Invoice

Leave the search field blank and click the Search button to display a list of Item Types that can be assigned to the Invoice.

- c. Select the relevant Item Type link to add it to the Invoice

The screenshot shows the 'Invoice Editor' interface with the 'Items' tab selected. The 'Item Type' is 'Iphone 6'. The 'Unit Price' is '\$0.00'. The 'Actual Price' is '\$0.00'. The 'Units' is '1'. The 'Taxable' checkbox is unchecked. There are 'Cancel' and 'Save' buttons at the bottom right. Below the form is a table with columns: Item Type, Item #, Unit Price, Actual Price, Units, Taxable, Total Price. The table currently shows '0 - 0 of 0 Results'.

- a. Enter the Actual Price information, if relevant and the number of Units to be ordered
- b. Mark the order as Taxable, if required

The tax is not included in the Actual Price but will be calculated within the Invoice Summary tab.

- c. Click Save to add the Item Type details to the Invoice

The screenshot shows the 'Invoice Editor' interface with the 'Items' tab selected. The table now contains one row: 'Iphone 6' with 'TBA' as the Item #, '\$0.00' as the Unit Price, '\$0.00' as the Actual Price, '1' as the Units, and '\$0.00' as the Total Price. The 'Taxable' checkbox is checked. There are 'Delete', 'Add', 'Cancel', and 'Next' buttons at the bottom. Below the table is a summary bar showing '1 - 1 of 1 Results'.

- d. To add more Item Types, select **Add** and repeat the above process. Alternatively, click Next to move to the Contract tab, if required.

5. To add a Service Contract for a newly ordered Item Type:

- a. Select **Add** to add a Service Contract to the Invoice  
Or, click Next to go to the Invoice summary.
- b. Select the appropriate SLA from the drop-down options
- c. Select the Item Type related to the Service Contract  
To search for an Item Type enter any known details in the Find Item Type search field.
- d. Click the Item Type link to assign it to the Invoice

**Invoice Editor**

Customer    Items    Contract    Summary

SLA: Warranty

Item Type: Iphone 6

SLA Price: \$0.00 per Annum

Actual: 0.00

Units: 1

Taxable:

Time: Subscription

Start Date: 01/07/16 12:34

End Date: 01/07/17 23:59

Cancel    Save

| SLA                | Item Type | Item # | Contract # | Unit Price | Actual | Units | Taxable | Total Hours |
|--------------------|-----------|--------|------------|------------|--------|-------|---------|-------------|
| 0 - 0 of 0 Results |           |        |            |            |        |       |         |             |

- e. Amend the Actual Price, if relevant
- f. Check the Contract as taxable, if relevant
- g. Select the Time period 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.

*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.

---

**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.

---

- h. Click Save

- 6. To add another contract to the Invoice, click **Add** and repeat the above process.

**Invoice Editor**

Customer Items Contract Summary

| <input type="checkbox"/> | SLA      | Item Type | Item # | Contract # | Unit Price | Actual | Units | Hours | Taxable                             | Total  |
|--------------------------|----------|-----------|--------|------------|------------|--------|-------|-------|-------------------------------------|--------|
| <input type="checkbox"/> | Warranty | Iphone 6  | TBA    | TBA        | \$0.00     | \$0.00 | 1     | N/A   | <input checked="" type="checkbox"/> | \$0.00 |

1 - 1 of 1 Results

Delete Add Cancel Next

7. Click Next to move onto the Summary page.

### Invoice Editor

Customer
Items
Contract
Summary

**Invoice # 100034**

#### Customer Details

Name James Stewart  
 Org. Unit Micro Focus - Information Technology  
 Address 1  
 Address 2  
 City  
 State  
 Zip  
 Country

#### Order Details

PO Number   
 Order Date 01/07/16 12:31   
 Invoice Date 01/07/16 12:31   
 Due Date 01/19/16 00:00   
 Entered By Kamal K  
 Processed By

#### Details

Custom 1   
 Custom 2   
 Custom 3

#### Line Items

Items

| Item Type       | Actual Price | Units | Taxable | Total Price |
|-----------------|--------------|-------|---------|-------------|
| Iphone 6        | \$0.00       | 1     |         | \$0.00      |
| <b>Subtotal</b> |              |       |         | \$0.00      |

Contracts

| SLA      | Item Type | Actual Price | Units | Hours | Taxable | Total Price |
|----------|-----------|--------------|-------|-------|---------|-------------|
| Warranty | Iphone 6  | \$0.00       | 1     | N/A   |         | \$0.00      |

1 - 1 of 1 Results

Apply Terms

Notes

#### Delivery Details

First Name James  
 Last Name Stewart  
 Address 1  
 Address 2  
 City  
 State  
 Zip  
 Country

#### Status

Invoice Status Pending  
 Delivery Status Undelivered  
 Payment Status Pending Unpaid  
 Payment Date  
 Shipping Date 01/07/16 12:31   
 Tracking Number

#### Costs

Line Items Total \$0.00  
 Shipping   
 Tax \$0.00 (@ 13.00 %)  
 Adjustment   
**Total**

Cancel
Save

8. Enter a PO Number and make any other adjustments, if relevant
9. Click Save

10. Select **Email** to send the Invoice to the Customer, if required
11. Click Done.

## Creating an Invoice to Purchase a Service Contract

To create a Service Contract Invoice:

1. Select Finance>Invoices
2. Click New


The Customer tab appears.

3. To assign a Customer to the Invoice:

- a. To search for a Customer who already exists in the system

Enter any known information such as their First Name, Last Name, Email Address, Org. Unit or Username in the Find Customer fields. To view a list of all Customers in the database, leave all the fields blank.

The screenshot shows the 'Invoice Editor' interface with four tabs: 'Customer', 'Items', 'Contract', and 'Summary'. The 'Customer' tab is active. On the left, there is a 'Contact' section with a list of fields: Name, Email, Phone, Fax, Pager, Mobile, Org. Unit, Address 1, Address 2, City, State, Zip, and Country. Below this is a 'Delivery Details' section with a checked box for 'Use Customer Details'. On the right, there is a 'Find Customer' search form with fields for First Name, Last Name, Username, Email, Phone, and Org. Unit. There is also a checkbox for 'Supported Org. Units Only' and a search icon. At the bottom right, there are 'Cancel' and 'Next' buttons.

- b. Click 
- c. Click on a Customer's name to assign them to the Invoice

The Delivery Details are automatically extracted from the Customer Details. If they are not the same, uncheck by clicking the tick in the Use Customer Details box and enter the correct details.

- d. Select Next to display the Items tab

The system moves to the Items tab and displays the following message



- c. Select the Contract Type:

| Contract Type     | Description  |
|-------------------|--|
| Item Contract     | To purchase a contract for an Item. Search and select an Item using the Find Item search.                        |
| Customer Contract | To purchase a contract for a Customer. Search and select a Customer using the Find Customer search.              |
| Org Unit Contract | To purchase a contract for an Organizational Unit. Search and select an Org Unit using the Find Org Unit search. |

- a. Amend the Actual Price, if relevant  
 b. Check the contract as taxable, if relevant  
 c. Select the Time period covered by the [Contract](#):

If *Subscription* is selected, the Start and End Dates are automatically completed by the system.

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, a contract that covers a total number of support hours purchased for a defined timeframe and allocated on a per month basis.

(If a Contract is forward dated with a Start Date set in the future, the Pending Contract status is assigned. See [Pending Contracts](#).)

---

**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.

---

- d. Click Save  
 e. To add another contract to the Invoice, click



**Add**

and repeat the above process.

The screenshot shows the 'Invoice Editor' interface with the 'Items' tab selected. The table below displays the invoice items:

| SLA | Contract Type | Name                              | Contract # | Unit Price | Actual     | Units | Hours | Taxable | Total      |
|-----|---------------|-----------------------------------|------------|------------|------------|-------|-------|---------|------------|
| SLA | Per Item      | Item :Wifi Service (WIFI Service) | TBA        | \$1,500.00 | \$1,500.00 | 1     | N/A   | ✓       | \$1,500.00 |

Below the table, there is a pagination indicator '1 - 1 of 1 Results' and four buttons: 'Delete', 'Add', 'Cancel', and 'Next'.

5. Click Next to move onto the Summary page
6. Make any adjustments, as required
7. Click Save
8. Select **Email** to send the Invoice to the Customer, if required
9. Click Done.

## Invoice Summary

The Invoice Summary tab includes the invoiced Customer, delivery and order details. It allows Users to email the Invoice to relevant parties and displays the status of the Invoice. The summary screen also allows Finance Users to process an Invoice when payment is received.

The following fields are included with the Invoice Summary tab:

| Fields          | Description  |
|-----------------|--|
| PO Number       | Auto-generated or manually entered order identification number.  |
| Order Date      | Auto-generated or manually adjusted order date.  |
| Invoice Date    | Auto-generated or manually adjusted date for the invoice creation.   |
| Due Date        | The date the invoice is due. Auto-generated based on the Default Invoice Due value defined by the Administrator. |
| Entered By      | The User who created the invoice.  |
| Processed By    | The User who processed the invoice.  |
| Invoice Status  | Displays what stage of the order process the invoice is in.  |
| Delivery Status | Details the status of delivery for items on the invoice  |

| <b>Fields</b>                 | <b>Description</b>  |
|-------------------------------|---|
| Payment Status                | Details if the invoice has been paid  |
| Payment Date                  | Date the invoice was processed for payment.   |
| Shipping Date                 | Manually entered date of shipping.  |
| Tracking Number               | Reference number manually entered to track the order.   |
| Apply Terms                   | For the system terms and conditions to be included in the PDF Invoice and the Invoice emailed to the Customer, tick the Apply Terms option. |
| Notes                         | Enter any additional Invoice information within the Notes field.  |
| Shipping, Discounts and Taxes | Before saving an Invoice, any shipping costs to be included in the grand Invoice total can be entered in the Shipping field.                |
| Adjustment                    | The Adjustment field records Customer discounts and will be subtracted from the final order total.  |

---

**NOTE:** A flat tax percentage can be added to taxable line Items included on the Invoice. This is a global property that is configured by the system Administrator, in Setup>Billing>Tax Rate, but can be edited if required.

---

**Invoice Editor**

Customer    Items    Contract    Summary

Edit    PDF    Invoice # 100035

**Customer Details**

Name James Stewart

Org. Unit Micro Focus - Information Technology

Address 1

Address 2

City

State

Zip

Country

**Order Details**

PO Number 12

Order Date 01/07/16 12:39

Invoice Date 01/07/16 12:39

Due Date 01/19/16 00:00

Entered By Kamal K

Processed By

**Details**

Custom 1

Custom 2 1

Custom 3

**Line Items**

Contracts

| SLA | Contract Type | Name                              | Actual Price | Units | Hours | Taxable                             | Total Price |
|-----|---------------|-----------------------------------|--------------|-------|-------|-------------------------------------|-------------|
| SLA | Per Item      | Item :Wifi Service (WIFI Service) | \$1,500.00   | 1     | N/A   | <input checked="" type="checkbox"/> | \$1,500.00  |

1 - 1 of 1 Results

Apply Terms

Notes

**Delivery Details**

First Name James

Last Name Stewart

Address 1

Address 2

City

State

Zip

Country

**Status**

Invoice Status Pending

Delivery Status Undelivered [Process](#)

Payment Status Pending Unpaid

Payment Date

Shipping Date 01/07/16 12:39

Tracking Number

**Summary**

Subtotal \$1,500.00

**Costs**

Line Items Total \$1,500.00

Shipping \$0.00

Tax (@ 13.00%) \$195.00

Adjustment \$0.00

**Total \$1,695.00**

Email    Done

## Emailing an Invoice

Once an invoice is created, selecting the Email button will send a copy of the Invoice to:

1. The Customer who placed the order
2. The system Finance User

3. The User who recorded the Invoice
4. The Customer who will take delivery, if different to the person who placed the order.

If the system Administrator has enabled the Email Invoice functionality in the application Setup, the Invoice will be emailed automatically to the relevant parties when it is created.

## Invoice Status

When an Invoice is first logged in the system it has a status of Pending. A pending Invoice can be edited. However, when an Invoice has been successfully delivered or processed, the Invoice Status moves to Active and it is no longer editable.

| Status          |                                     |
|-----------------|-------------------------------------|
| Invoice Status  | Pending                             |
| Delivery Status | Undelivered <a href="#">Process</a> |
| Payment Status  | Pending Unpaid                      |
| Payment Date    |                                     |
| Shipping Date   | 01/07/16 12:39                      |

An Invoice changes to a status of Cancelled when one of the following events occurs:

- ♦ Another Invoice is created to supersede the original Invoice
- ♦ The Invoice was created for a specific Incident and that Incident was deleted/cancelled either manually or due to the Incident Cancel Time, set by the system Administrator, being exceeded. See Setup>Billing within the Administrator Guide.

## Editing an Invoice

To amend Invoice details or to include additional Line Items, edit or enter the information prior to selecting the Process hyperlink. This link is not available when the Invoice is in Edit mode, as all Invoice information must be locked down to ensure the application has control of the details of the Items and their delivery.

## Invoice Delivery and Payment

Relative to the workings of your support organization, Item and/or Support Contract Invoices may or may not need to be paid before an Item can be delivered to your Customer or Support Contract used by your Customer.

To update the Shipping Date, open the Invoice in Edit mode when the Delivery Status is Undelivered and enter the relevant date within the Shipping Date field.

## Processing an Invoice when Payment is Required

For organizations where the option of Payment Required is enabled by the Administrator, a User with Finance access is the only User who can update the Payment Status of an Invoice. To update the Payment Status, the Finance User selects the Payment Received hyperlink of an Invoice to change the status to Paid. Once payment has been made, any other User, such as a Supervisor, can process the Invoice.

| Status          |   |
|-----------------|---|
| Invoice Status  | Pending   |
| Delivery Status | Undelivered <a href="#">Process</a>             |
| Payment Status  | Pending Unpaid <a href="#">Payment Received</a> |
| Payment Date    |   |

## Processing an Invoice when Payment is not Required

If the Payment Required option has not been enabled by the system Administrator, a Line Item can be activated in the support system by selecting the Delivery Status Process hyperlink. This means that Customer payment does not need to be received by the organization before the Customer Item is delivered or a support contract is activated in the system.

When the Process hyperlink is clicked, the Invoice Status is updated to Active, and the Delivery Status changes to Delivered. (If the invoice is related to a support contract, the request status is moved from Pending - No Contract to the Workflow default open State, such as Pending.)

| Status          |   |
|-----------------|---|
| Invoice Status  | Active  |
| Delivery Status | Delivered                                       |
| Payment Status  | Pending Unpaid <a href="#">Payment Received</a> |
| Payment Date    |   |
| Shipping Date   | 07/29/10 14:01                                  |

- ◆ [Purchase Orders](#)



# A Appendices

- ♦ [Working on requests](#)

## A.1 Email Polling & Request Creation via Email

The Email Polling feature automatically manages incoming support requests via email, helping organizations to respond quickly and efficiently to Customer inquiries and minimizes time-consuming data entry tasks for Technicians.

### A.1.1 Email Polling

By itself, the Email Polling feature acts as an auto-responder.

To turn on Email Polling:

1. Log in as Administrator
2. Select Setup>Email
3. Enter the Server Details

These are the system accounts for the incoming and outgoing mail servers.

4. Within the Setup Tab, select Yes for Email Polling
5. Complete the Interval field

Specify (in minutes) how long the system should wait between automated scans of the system email account. (At minimum this can be set to 5 minutes.) At the specified interval, the system will automatically scan the inbox of the system email address for messages.

6. Define remaining General, Requests and Notes Settings:

---

#### General Settings

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Email Polling

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.

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.

**NOTE:** This option will be locked down if the Create via Email option is selected.

Interval

Enter the time period the system will use to check the incoming server for any messages sent to the support system.

---

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## General Settings

---

|                          |   |
|--------------------------|---|
| Include Banner           | Select Yes to include a banner within emails sent from the system.<br><br>The banner will be derived from:<br>Setup>Customize>Setup>Public Banner.  |
| Email Errors             | When enabled, details of any system errors occurring while the application is running will be sent to the development lab.  |
| Copy Type                | For emails sent within requests, define if the Technician is to be copied or blind copied the correspondence.   |
| Requests                 |   |
| Create/Update via Email  | Select this option to enable requests to be created from emails addressed to the support system and Team addresses aliased on the email server.<br><br><b>NOTE:</b> Email Polling will be locked down to Yes when this option is selected and the Accept Anonymous option is displayed.   |
| Accept Anonymous         | 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.)   |
| Notify Alternate Team    | 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. |
| Self Mail                | When set to Yes, new Notes created by a Technician or Customer are also sent to them when they save the Note.   |
| 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

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## General Settings

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|                       |   |
|-----------------------|---|
| 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.<br><br><b>NOTE:</b> The content for automated emails sent from the system for languages other than English, is defined within the Localization>Content tab. |

---

7. Click Save

8. Customize the content of emails automatically sent by the system within the Templates tab

This includes [Handshaking \(CloseRequest\)](#), [No Account](#) and [Signature](#) Templates. The message prefix used by the system to recognize correspondence related to requests stored in the system can also be edited within the Prefix template.

If the request creation feature is turned off (i.e., the Create Incidents checkbox is not ticked), a reply is automatically emailed to the sender. The email informs the sender that requests are not received via email, and if they want to log a request they are advised to do so via the Customer Portal. The content of the Responder message can be configured by the Administrator in Setup>Email>Templates.

---

**NOTE:** Important: Before using the Email Polling feature, ensure that the main system email accounts inbox is empty. Otherwise, any messages in the inbox will be acted upon either with an auto-response message being bounced back to the sender or the system will attempt to create requests for the messages. The action will depend on the application's settings.

---

Please take special caution if the main system email account is an IMAP account. Unlike POP accounts, messages generally are not removed from an IMAP server's inbox after they are read. This means that failure to clear out the inbox prior to using the Email Polling feature could result in auto-responses being sent to (or requests being created for) every message in the inbox.

## A.1.2 Creating requests via Email

If the Create Incidents feature is turned on, the system will attempt to either create a new request or update an existing one each time a message arrives in the system inbox.

To activate this feature:

1. Tick the Create/Update via Email checkbox under Setup>Email>Setup
2. If all Team members are to receive a copy of the notification that a new request has been received, set the Notify Alternate Team option within the Information tab of the Team.

To create a request via email, a Customer with a pre-existing account can simply send an email message describing the issue to the appropriate Team email address (refer to Setting Up Team Aliases, below).

When a new message arrives, the system identifies the Customer by matching the sender's email address against the addresses of Customers registered in the database. If it fails to find a match, an email is bounced back to the sender notifying them that they must create an account before creating requests via email. The content of this message is configured in the No Account field under Setup>Email>Messages.

If a matching Customer account is found, and the address that the email was sent to belongs to an existing Team, a request is created in the system. The body of the email becomes the main text of the request description. Any attachments included with the email will also be attached to the request. The new request is assigned a priority type of Medium, and uses the default Classification - General.

If the Customer only owns a single Item, this Item is automatically assigned to the request and the standard system SLA check of Customer>OrgUnit>Item will be run to verify which SLA should be assigned to the request.

If the Customer owns multiple Items, the system can automatically assign the relevant Item upon request creation if the Customer prefixes the email subject with 'Item #' followed by the Item identification number as recorded in the CMDB. If the Customer has an account in the system and is assigned as an owner of the Item, the system will refer to Relationships and Skills configured in the CMDB, resulting in the request being routed to the most relevant Technician for the job.

---

**NOTE:** If you want to create a request against a specific item through an email, the email subject must be prefixed with 'Item #' followed by the Item identification number as recorded in the CMDB in the following format:

1. If Item identification include spaces, use: Item # <item\_identification>  
Example: Item # <ZENworks Agent>
2. If the item identification does not include spaces, use: Item # <item\_identification> or Item # item\_identification  
Example: Item # 102345 or Item # <102345>

---

In the case where the "Item #" is not included in the email subject line, and if the matching Customer is assigned zero or multiple Items, the new request uses the Unknown Item and the system default SLA. It is assigned to the Team or Technician who support the Unknown Item. When the Item is

changed from Unknown to a specific Item, the Team or Technician assigned may change based on the Team configured to support the Item. The SLA may also be automatically reset by the system as it applies the SLA derivation logic of Customer>OrgUnit>Item to assign the relevant SLA.

Once the request has been created, an entry is added to the request Audit Trail, stating the request was generated via email. The Customer and the assigned Technician then receive emails notifying them of the request number and details.

### **A.1.3 Monitoring Tools and Request Creation**

To automatically create requests from emails sent by monitoring tools, the monitoring tool must be created as a Customer within the system. The email address used by the monitoring tool can be the system default support address or a specific Team address. (See: Setting up Team Aliases below for sending to a Team address.) Once the request is created, an entry is added to the request Audit Trail, stating the request was generated via email. The monitoring tool Customer account and the assigned Technician receive emails notifying them of the request number and details.

If the monitoring tool Customer account is assigned to a single Item, this Item is automatically associated with the request and the standard system SLA check of Customer>OrgUnit>Item will be run to verify which SLA should be assigned to the request.

If the monitoring tool Customer account is associated with multiple Items within the CMDB, the system can automatically assign a specific Item upon request creation if the monitoring tool email prefixes the email subject with 'Item #' followed by the Item identification number as recorded in the CMDB. In this situation, if multiple Customers own the Item and if the request is to be associated with a different Customer after the request is created, Technicians can update the Customer details to move it from the monitoring tool Customer account within the Customer tab of the request Summary Tab.

In the case where the "Item #" is not included in the email subject line, and if the matching monitoring tool Customer account is assigned zero or multiple Items, the new request uses the Unknown Item and the system default SLA. It is assigned to the Team or Technician who support the Unknown Item. When the Item is changed from Unknown to a specific Item, the Team or Technician assigned may change based on the Team configured to support the Item. The SLA may also be automatically reset by the system as it applies the SLA derivation logic of Customer>OrgUnit>Item to assign the relevant SLA.

### **A.1.4 Adding Notes via Email**

Managing requests via email is handled by the application sending its initial email with the subject line prefixed by the 'Incident #' or in the case of Change Management, prefixing the RFC subject line with 'Change Request #', followed by a series of numbers that make up the individual request identification number. Customers simply reply to this email and their correspondence is assigned to the relevant request, and any attachments are also uploaded to their request. Technicians can also reply to these emails to update the request, if convenient.

When the Note has been created, an entry is added to the request Audit Trail, indicating that a Note was added via email. The Customer and assigned Technician are then sent emails alerting them to the creation of a new Note.

## A.1.5 Setting Up Team Aliases

For an incoming message to result in the successful creation of a request, it must be addressed either to the main system email address or to an email account that is an alias for the main system account and assigned to an existing Incident, Change or Service Request Team.

For example, if your main system email address is support@yourcompany.com and you want to set up three Teams, Team A, Team B and Team C, those three Teams should use email addresses that are aliases for support@yourcompany.com.

- ♦ teamA@yourcompany.com should forward messages to support@yourcompany.com
- ♦ teamB@yourcompany.com should forward messages to support@yourcompany.com
- ♦ teamC@yourcompany.com should forward messages to support@yourcompany.com.

---

**NOTE:** Consult the documentation that came with your mail server for information on setting up email aliases.

---

Using this technique, any message that is sent to teamA@yourcompany.com, teamB@yourcompany.com or teamC@yourcompany.com is automatically forwarded to support@yourcompany.com. The Email Polling mechanism then picks up those messages and responds accordingly. The resulting request is assigned to a Technician within the Team the message was addressed to.

An alternate configuration would involve setting a single Team's email address to the main system address, which by-passes the need for aliases but does not allow the system to funnel requests to specific Teams.

## A.1.6 Troubleshooting

If you have trouble setting up or using email polling and creation, keep the following tips in mind:

- ♦ For the request creation feature to work properly, both the Email Polling and Create/Update via Email options must be selected under the Admin>Setup>Email>Setup tab
- ♦ Only emails sent to the main system address or to an alias that is currently in use by an existing Team can be accepted
- ♦ All pertinent information regarding the main system email address and the incoming and outgoing mail servers must be completed correctly
- ♦ Ensure the Customer sending the email has a valid email address within the system.

---

**NOTE:** Only Incidents, Change and Service Requests can be created via email. If a User attempts to send an email to a Problem Team, a reply email will be forwarded to them informing the User that the email must be sent to an Incident, Change or Service Request Team, for a request to be logged with the system.

---

## A.2 inserted

### A.2.1 Email Templates

Administrators can customize the content and template details for emails automatically generated by the system within the Templates tab.

The labels for the Templates are generated in English, but can be customized within the [Setup>Localization>Content](#) tab.

The filter views within the Templates tab include:

| View Option             | Description   |
|-------------------------|---|
| Full Email Templates    | Allows Users to customize the content and insert <a href="#">parameters</a> of emails automatically generated and sent by the system.   |
| Email Summary Templates | Users configure the content of templates that are included in the automatically generated emails, which summarize the specific details of the matter at hand. See: <a href="#">Summary Templates</a>  |
| Email Keywords          | Allows Users to enter alternative words for the system to use when sending mail and parsing emails received at the support email address.<br><br>See: <a href="#">Keywords</a> for a description of where the words are used by the system. |
| Error Message Templates | Allows the Use to customize the error messages automatically generated and sent by the system. See: <a href="#">Error Messages</a> .  |
| Out of Office           | Allows the User to customize multiple Out of Office options for the system to identify in incoming email Subject lines, so it knows to ignore the email. See: <a href="#">Out of Office</a> .   |
| SMS Templates           | Allows Users to customize the content and insert <a href="#">parameters</a> for text messages automatically generated and sent by the system.   |

Content for the automatically generated email messages sent by the system is configured within the Full Email Templates filter screen of the Email > Templates tab. In addition to customizing the content of the messages, there is also the facility to insert parameters for specific details sourced from the database.

The template parameters, look and feel of email messages sent in regard to Knowledge Base Articles, Items, Requests, Invoices and Contracts are configured within the Email Summary Templates filter screen of the Templates tab.

## Configuring Full Email Templates

To configure messages:

1. Select Setup>Templates>Full Email Templates filter

The Full Email Template filter screen is displayed.

The screenshot shows the 'Email' configuration page with a navigation bar containing 'Server', 'Setup', 'Templates', 'SMS', and 'Log'. A dropdown menu is set to 'Full Email Templates'. Below the navigation is a table with two columns: 'Name' and 'Content'.

| Name                      | Content   |
|---------------------------|---|
| AccountInformation        | Hello {{Full Name}},<br><br>Below is your Account login information:<br><br>Account Type: {{Account Type}}<br>Username: {{Username}}<br><br>To retrieve your password please use 'Forgot Password' on the main login page.<br>Please contact the administration team if you have any further questions.                       |
| AccountInformationSubject | Your Account Information  |
| ApproveChange             | This RFC is pending your approval.<br><br>Please access the Service Desk to approve the RFC manually.<br><br>Alternatively, you may reply to this email:<br>To Accept the RFC, include the words 'accept' or 'yes'.<br>To Reject the RFC, include the words 'reject' or 'no'.   |
| ApproveServiceRequest     | This Service Request is pending your approval.<br><br>Please access the Service Desk to approve the Service Request manually.<br><br>Alternatively, you may reply to this email:<br>To Accept the Service Request, include the words 'accept' or 'yes'.<br>To Reject the Service Request, include the words 'reject' or 'no'. |

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### Email Templates

|                            |   |
|----------------------------|---|
| AccountInformation         | Sent when a Customer or User is emailed the login details of their account.   |
| AccountInformation Subject | Content to be included in the Email Subject line when a Customer or User is emailed the login details of their account.   |
| ApproveChange              | <p>Message sent to Managers when an RFC moves to an Approval State.</p> <p>The configured message must indicate to Managers that they are specific with their reply, using:</p> <p>The words 'accept' or 'yes', to Accept the Change</p> <p>The words 'reject' or 'no', to Reject the Change.</p> |

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## Email Templates

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|                                    |  |
|------------------------------------|--|
| ApproveServiceRequest              | <p>Message sent to Managers when a Service Request moves into an Approval State.</p> <p>The configured message must indicate to Managers that they are specific with their reply, using:</p> <p>The words 'accept' or 'yes', to Accept the Change</p> <p>The words 'reject' or 'no', to Reject the Change.</p> |
| ClosedPrefix                       | <p>Included at the beginning of the email when a request is closed.</p>  |
| ClosedTimeout                      | <p>Used by the handshake facility and prefaces emails sent as Incident Note using the Propose button.</p>  |
| CloseRequest                       | <p>Message included in the Email that uses the handshaking facility and proposes a Solution to the Customer.</p>   |
| CloseRequestLink                   | <p>The message sent with the hyperlink to enable Customers to keep a request open after a possible solution has been sent to them. This template is used in conjunction with the CloseRequest message when the Handshaking facility is used to by a Technician to propose a Note as a solution.</p>            |
| ContractExpired Message            | <p>Email sent to a Customer when a Contract has expired and a new request is logged or an existing request is still open when the expiration date is hit.</p>  |
| ContractTimeElapsed (Subject Line) | <p>Subject line for ContractExpiredMessage, which is he email sent to a Customer when a Contract period has elapsed or all purchased support hours have been used.</p>   |
| ContractTimeLow                    | <p>Email sent to a Customer when the amount of time remaining on a Contract triggers the low time percentage threshold. (The default percentage is defined in the Setup&gt;Billing&gt;Contracts tab.)</p>  |
| CreateChange                       | <p>Included at the beginning of the email to a Customer when a Change Request is first created.</p>  |
| CreateIncident                     | <p>Included at the beginning of the email to a Customer when an Incident is first created.</p>   |
| CreateProblem                      | <p>Included at the beginning of the email to a Customer when a Problem is first created.</p>   |
| CreateServiceRequest               | <p>Included at the beginning of the email to a Customer when a Service Request is first created.</p>   |

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## Email Templates

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|                                    |   |
|------------------------------------|---|
| InvoicePrefix                      | <p>Included at the start of an email sent to the Customer with a newly created Invoice.</p> <p>(This email content is also used for the email sent to Customers when the Setup&gt;Billing&gt;Contracts option is enabled and the number of days for the Subscription "Contract Renewal Time" is triggered.)</p> |
| ItemStatusChangePrefix             | <p>Included at the beginning of the email sent to a Customer when an Item Status has been amended and the option to notify customer is selected in the Item Information tab.</p>  |
| LDAPInformation                    | <p>Sent when a new Customer or User is emailed the login details of their account after an authentication server synch.</p>   |
| NewAttachmentToTech                | <p>Sent when to a User when a new attachment is added to a request in the Customer Portal.</p>  |
| NoAccount                          | <p>This message is sent to a Customer when they have attempted to log an Incident via Email but are not registered with the system.</p> <p><b>NOTE:</b> The Subject line of this email can be customized in the Error Message Templates filter of the Email&gt;Templates tab.</p>                               |
| NoContractCreate<br>RequestSummary | <p>Message sent to a Customer to inform them that work cannot commence on newly logged request as no contract is in place.</p>  |
| NoContractReminder<br>Summary      | <p>Reminder message sent to a Customer to inform them that work cannot commence on newly logged request as no contract is in place.</p>   |
| NoteClosedPrefix                   | <p>Email sent to a Customer when they have sent an email Note to the system, when a request was already closed.</p>   |
| NotePrefix                         | <p>Included each time a new Note is associated with an existing request.</p>  |
| PasswordLost                       | <p>Sent when a Customer or User is emailed their account information for login as a result of their selecting the Forgot Password link on the Login Page.</p>   |

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## Email Templates

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|  |   |
|--|---|
| PasswordQuestion                         | Sent when a Customer or User is emailed a challenge question for resetting their password for login as a result of their selecting the Forgot Password link on the Login Page. (The Password Questions option is enabled in the Setup>Privileges>System tab. The questions/answers are set within the Customer/User My Account Information screen.) |
| PasswordReset                            | Sent when a Customer or User is emailed their account information for login after their Password has been re-set within the Customer Information or User Information screen.  |
| PlannedOutagePrefix                      | Included in the email sent when an Item is scheduled to be taken offline.   |
| RequestAccepted<br>Prefix                | Acknowledgement sent to the person responsible for a Request in an Approval State, when a Request is approved.  |
| RequestDeescalate<br>FromTo              | When a request is manually de-escalated this message is sent to the newly assigned Technician.  |
| RequestDeescalate<br>NotAvailable        | When a request is manually de-escalated this message is sent to the previously assigned Technician to let them know that the request is no longer available for them to work on.  |
| RequestEscalateFromTo                    | When a request is manually escalated this message is sent to the newly assigned Technician.   |
| RequestEscalateNotAvailable              | When a request is manually escalated this message is sent to the previously assigned Technician to let them know that the request is no longer available for them to work on.   |
| RequestReassignedManager<br>Prefix       | This message is sent when the Manager responsible for processing the approval of a request is changed and is sent to the previously assigned Manager.   |
| RequestReassignedManager<br>ToTechPrefix | The message included in an email when a request moves from a Manager Approval State to the newly assigned Technician User.  |
| RequestReassignPrefix                    | When a request is reassigned this message is sent with the request details to the previously assigned User.   |
| RequestReassignToPrefix                  | When a request is reassigned this message is sent with the request details to the newly assigned User.  |

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## Email Templates

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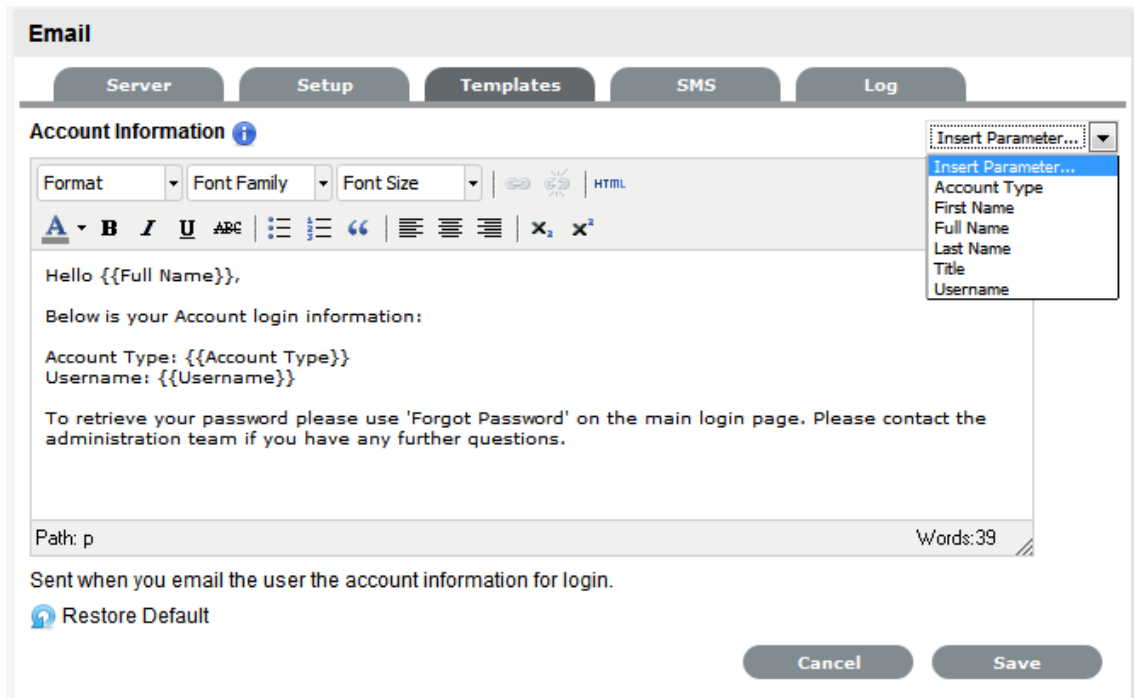
|                                 |  |
|---------------------------------|--|
| RequestRejectedPrefix           | Acknowledgement sent to the person responsible for a Request in an Approval State, when a Request is rejected.   |
| RequestStatusChanged<br>Prefix  | The content of an email sent when the Status of a request is moved from Pending-No Contract to the default open state of the assigned Workflow. This is sent to the assigned Technician.   |
| RequestStatusChanged<br>Subject | The content of the sent when the Status of a request is moved from Pending-No Contract to the default open state of the assigned Workflow. This is sent to the assigned Technician.        |
| RequestWorkaround               | Message sent when a Workaround is applied to a request in the Analysis tab and emailed to the Customer.  |
| Responder                       | Message sent from the monitored email account when the system does not accept new requests via email.  |
| Signature                       | The details included at the bottom of emails sent from the system.<br><br><b>NOTE:</b> Signatures can be customized on a per Team basis in the Setup>Localization>Content tab.             |
| SlaBreached                     | Email sent to the assigned User when an SLA is breached.   |
| SlaBreachedSubject              | The content in the Subject line of an email sent to an assigned User and Service Level Manager, and if configured within the SLA the Team Lead, when an SLA is breached.                   |
| SlaTimeElapsed                  | Sent to the assigned User and Service Level Manager, and if configured within the SLA the Team Lead, when an SLA Reminder/Warnings is triggered.   |
| SlaTimeElapsedSubject           | The content in the Subject line of an email sent to an assigned User and Service Level Manager, and if configured within the SLA the Team Lead, when an SLA Reminder/Warning is triggered. |
| SurveyCompleted                 | Thank you message automatically generated for Customers who have submitted a completed survey.   |
| SurveyPrefix                    | Message sent when a Customer or User is invited to complete a survey.  |
| SurveyReminderPrefix            | Message sent to a Customer or User to remind them to complete a survey.  |

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2. Click on the required message name link

The default text will be displayed.

3. Edit the message including inserting any relevant [Parameters](#)



The screenshot shows the 'Email' configuration window with tabs for 'Server', 'Setup', 'Templates', 'SMS', and 'Log'. The 'Account Information' section is active, displaying a rich text editor with the following content: 'Hello {{Full Name}},', 'Below is your Account login information:', 'Account Type: {{Account Type}}', 'Username: {{Username}}', and 'To retrieve your password please use 'Forgot Password' on the main login page. Please contact the administration team if you have any further questions.' The editor includes a toolbar with options for Format, Font Family, Font Size, and HTML. A 'Restore Default' button is located below the editor. A 'Cancel' and 'Save' button are at the bottom right. An 'Insert Parameter...' dropdown menu is open, showing options: 'Account Type', 'First Name', 'Full Name', 'Last Name', 'Title', and 'Username'.

4. Click Save.

---

**NOTE:** Approval Change, Approval Service Request, Create Problem and Create Change, Create Service Request apply to Service Manager Only.

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## Approval Messages

As the system allows Managers to approve or reject RFCs and Service Requests via email, the automatically generated emails must include specific instructions for the Manager to include either the words "accept" or "yes" to approve the RFC, or "reject" or "no" to reject the RFC in their reply. This is essential as the system will only recognize these key words when it automatically processes the email reply sent by the Manager.

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**NOTE:** This is only applicable to Service Manager.

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To use the [Manager Approval Process](#) via email, the system's email set-up must include the activation of the Email Polling functionality and the relevant Team details must include an incoming email address.

## A.2.2 Content

The Content tab allows Users to configure automated messages, user interface and system objects content for language files used by the application.

- ◆ “Item Type Request Fields” on page 1084
- ◆ “Email Parameters” on page 1092
- ◆ “Email Summary Templates” on page 1098
- ◆ “Keywords” on page 1106
- ◆ “Error Messages” on page 1110
- ◆ “Out of Office” on page 1113
- ◆ “SMS Templates” on page 1114

| Localization     |           |         |               |        |
|------------------|-----------|---------|---------------|--------|
| Regions          | Hours     | Content | Holidays      | Titles |
| Locale           | Language  | Country | Character Set |        |
| Chinese          | Chinese   |         |               | UTF-8  |
| Chinese (China)  | Chinese   | China   |               | UTF-8  |
| Chinese (Taiwan) | Chinese   | Taiwan  |               | UTF-8  |
| Dutch            | Dutch     |         |               | UTF-8  |
| English          | English   |         |               | UTF-8  |
| French           | French    |         |               | UTF-8  |
| German           | German    |         |               | UTF-8  |
| Hungarian        | Hungarian |         |               | UTF-8  |
| Italian          | Italian   |         |               | UTF-8  |
| Norwegian        | Norwegian |         |               | UTF-8  |

1 - 10 of 18 Results 

The customized content is applied to Customers and Users by setting the Email Locale option in their account information screen.

**Customer Information**

Contact Aliases Items

Email vCard

**Access**

Title

First Name | Jason

Last Name | Blackett

Username | jason@epm.blr.novell.com

Web access  Enabled  Disabled

**Contact**

Primary Email | jason@nsd.com

Send To Primary Email

Org. Unit Chinese Chinese (Simplified) Chinese (Traditional) Dutch English French German Hungarian Italian Norwegian Norwegian (Bokmal) Norwegian (Nynorsk) Polish Romanian Spanish Swedish Swedish (Sweden) Turkish

Line Manager

Address 1

Address 2

City

Zip

Country

Email Locale English

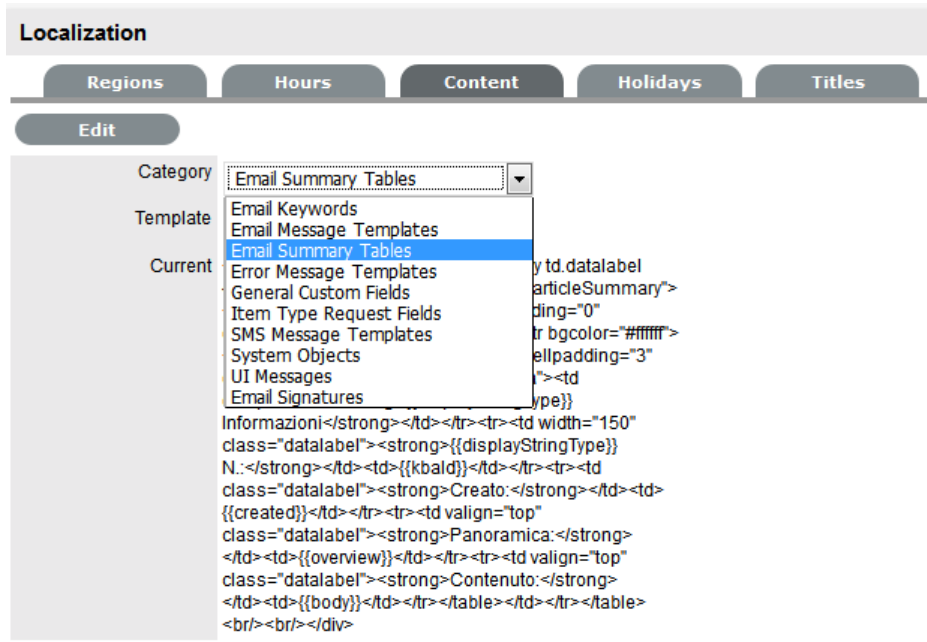
Content can be customized across the following elements and messages:

- ◆ [Email Keywords](#)
- ◆ [Email Message Templates](#)
- ◆ [Email Summary Tables](#)
- ◆ [Error Message Templates](#)
- ◆ [General Custom Fields](#)
- ◆ [Item Type Request Fields](#)
- ◆ [SMS Message Templates](#)
- ◆ [System Objects](#)
- ◆ [User Interface messages](#)
- ◆ [Email Signatures.](#)

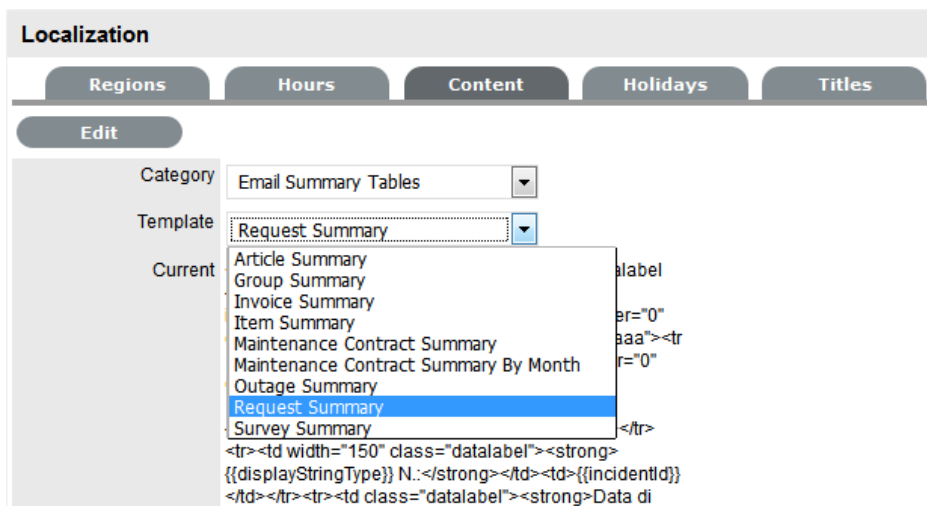
**NOTE:** It is recommended that the localization of user interface content, email and sms messages be done after they have been configured and reviewed within the Setup>Email and Setup>Customize tabs, respectively.

To customize content:

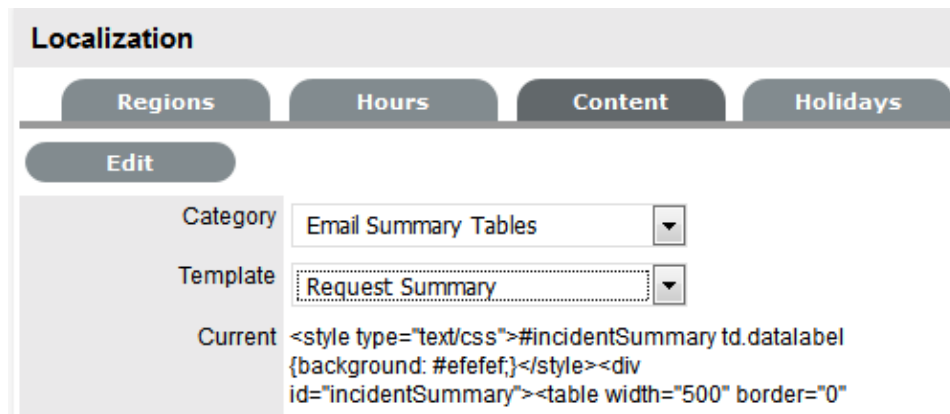
1. Select Setup>Localization
2. Move to the Content tab
3. Select the Locale link for the language file that is to be edited
4. Within the Category field, select the element to be customized



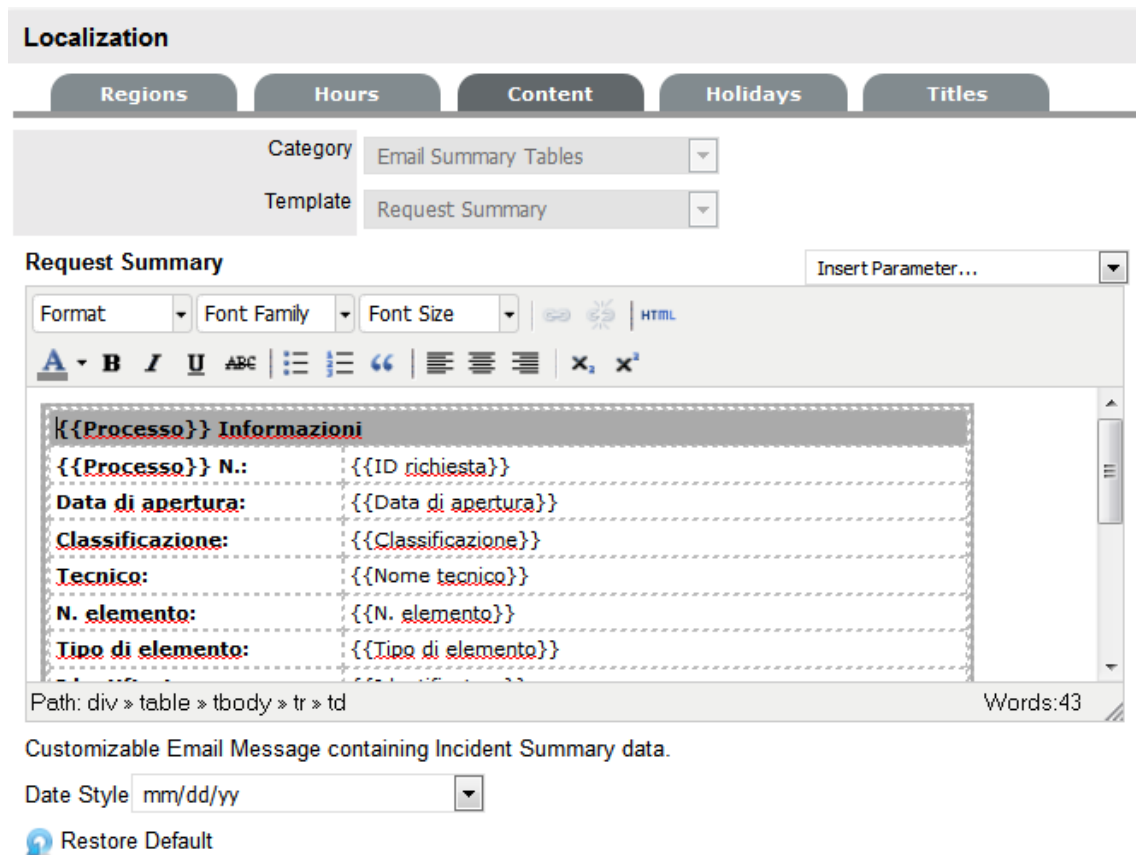
5. Within the default field displayed when the relevant Category is selected, choose the element to be customized



6. Click Edit



7. Amend the content and format, if required



8. Click Save.

Repeat the above process for all the relevant elements in the default list or select the Content tab to return to the Locale list.

# Item Type Request Fields

## Item Type Request 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.

| Field                           | Data Type | Style  | Active                              | Required | Customer Visible                    | Customer Editable                   | Default Value |
|---------------------------------|-----------|--------|-------------------------------------|----------|-------------------------------------|-------------------------------------|---------------|
| <a href="#">Access Enabled?</a> | Boolean   | Yes/No | <input checked="" type="checkbox"/> |          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | No            |
| <a href="#">Type Custom 2</a>   | String    | Text   |                                     |          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |               |
| <a href="#">Type Custom 3</a>   | String    | Text   |                                     |          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |               |
| <a href="#">Type Custom 4</a>   | String    | Text   |                                     |          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |               |
| <a href="#">Type Custom 5</a>   | String    | Text   |                                     |          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |               |

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.

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.  |
| 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.<br><br>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"> <li>◆ String - List or Free Text</li> <li>◆ Number</li> <li>◆ Boolean - radio buttons for Yes/No and True/False</li> <li>◆ Date - creates a date field</li> <li>◆ Currency- creates a currency field</li> <li>◆ Hyperlink.</li> </ul>                        |
| Style              | Defines how the data is recorded or presented in the field. (e.g., String - List or Free Text field.)<br><br>See <a href="#">Lists</a> or below for more information about creating a list within the 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.<br><br><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.)<br><br><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.

**Request Information**

Customer Details

**Request**

Request Type: New Incident

Classification: Service Offline

**Details**

Access enabled?  Yes  No

Field configured in the Item Type>Fields tab

Subject: [Empty]

Description: [Rich text editor toolbar]

Path: [Empty] Words: 0

Cancel Done

**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

Style: Text List

List Contents: [Entries]

Default Value: [Empty]

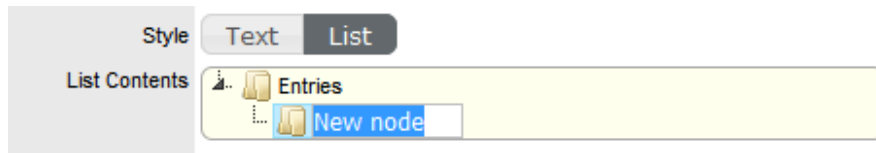
Enable Description: Y

Context Menu: Create, Rename, Delete

Cancel Save

2. Click Create

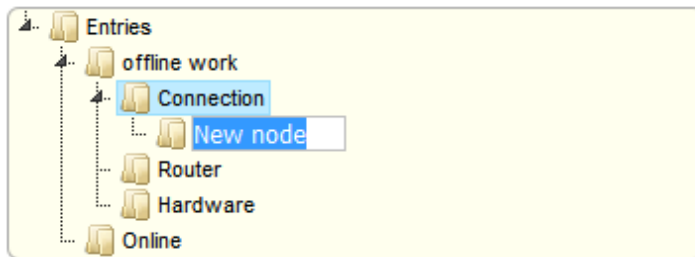
A New node link displayed



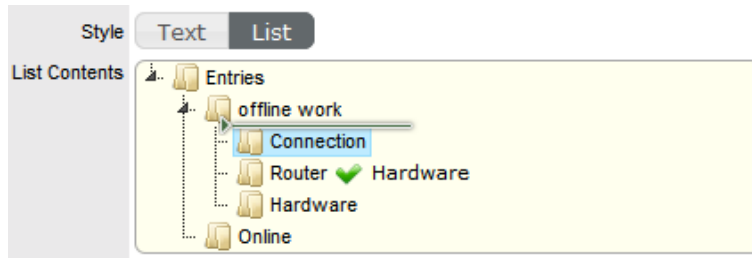
3. Enter the name of the field
4. Click outside the field to save the entry



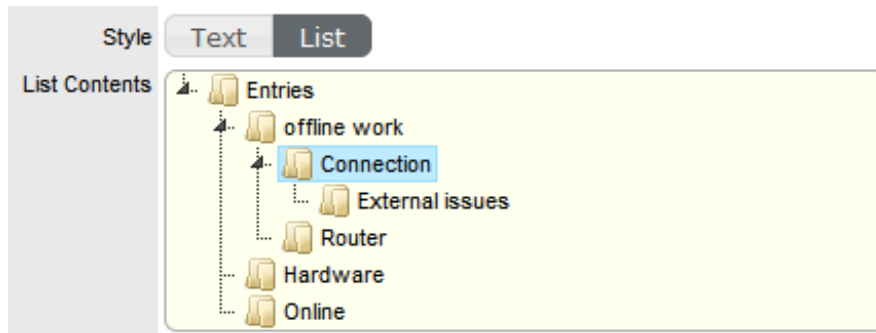
5. Repeat this process until all list entries have been added  
To create a nested list, right click on the relevant list entry and repeat the above process.



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.



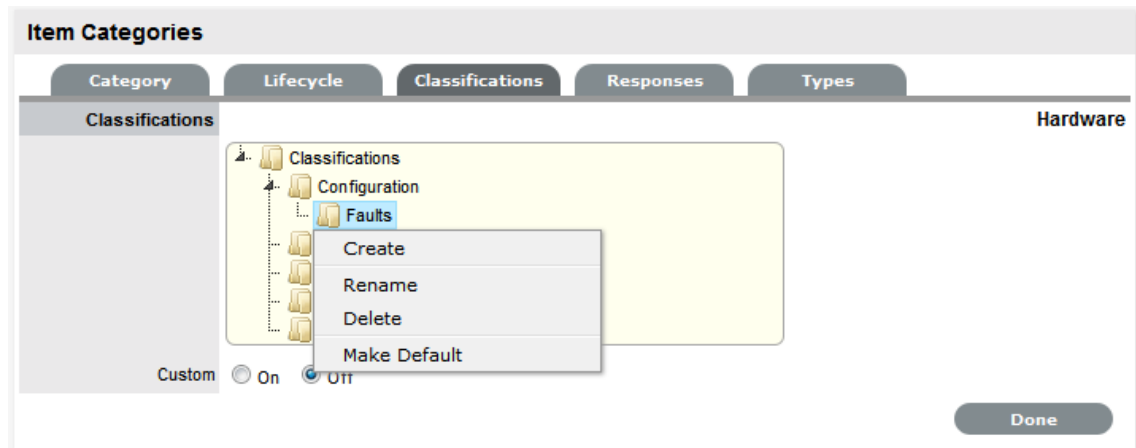
## Creating Nested List Entries

List entries can be expanded to include nested options.

To create a nested list:

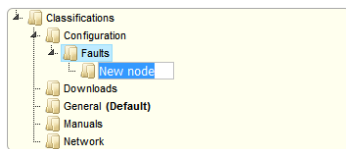
1. Right-click the relevant list entry header

The Create, Rename, Delete and Make Default options are displayed.

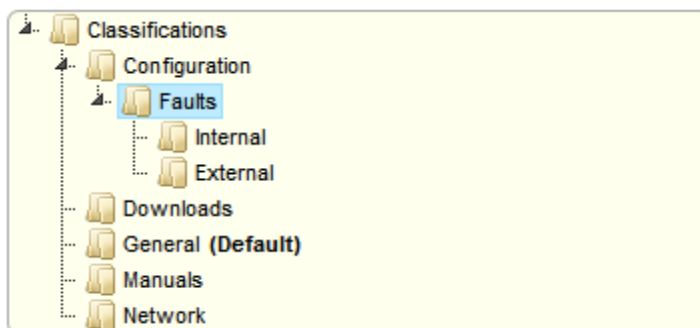


2. Select Create

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.

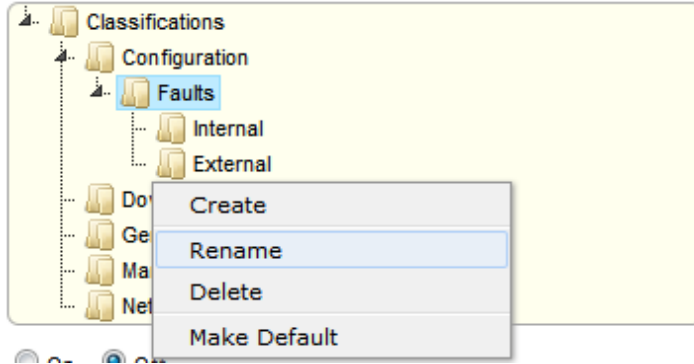


## Renaming a List Entry

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.

## Portals

All Public Access home page messages and some Customer Portal pages can be customized within the Portals tab.

Knowledge of HTML is required to edit this section. Links to documents and downloads may be added. The content can be customized for the following system Portals:

- 1.

| Name           | Description   |
|----------------|---|
| AlertHome      | Accessed by clicking the Alerts link on the system Login screen.                                    |
| AllServices    | Visible as the header within the Service Catalog screen of the Services tab in the Customer Portal. |
| CustomerForums | Visible as the header within the Forums page of the Customer Portal.                                |
| ForumsHome     | Visible as the header within the Forums pages of Public Forums.                                     |

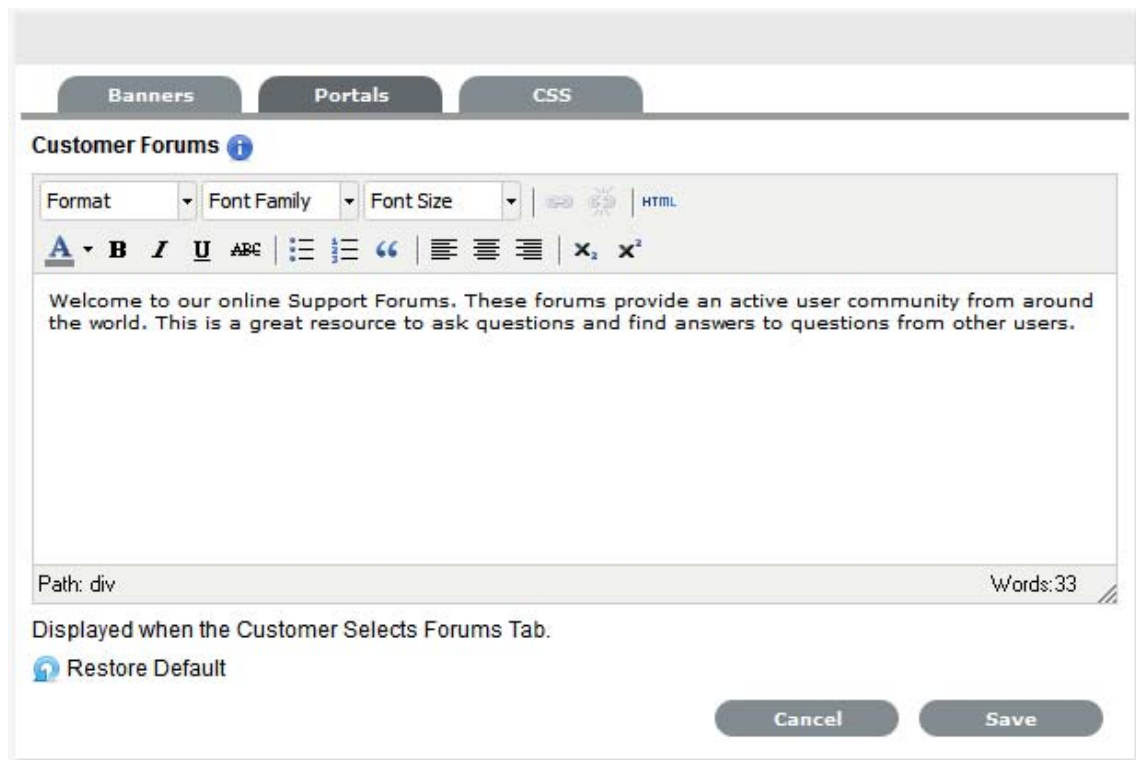
| Name          | Description   |
|---------------|---|
| Items         | Visible in the Items tab within the Customer Portal.  |
| KnowledgeHome | Accessed by clicking the Knowledge Base link on the system Login screen.                                  |
| Login         | Visible on the screen where system users enter their login credentials.                                   |
| Logout        | Visible on the page displayed when system users log out.  |
| OutagesHome   | Accessed by clicking the Outage link on the system Login screen of Service Manager installations.         |
| PlannedHome   | Accessed by clicking the Planned Outage link on the system Login screen of Service Manager installations. |
| Requests      | Visible in the Requests tab within the Customer Portal.   |
| SelfHelp      | Visible in the Self Help tab within the Customer Portal.  |
| Services      | Visible as the header within the Services tab of the Customer Portal.                                     |
| SurveyHome    | Displayed in the public online surveys page.  |
| Welcome       | Displayed on the landing page when the Customer logs into the Customer Portal.                            |

To customize a Portal message:

1. Select Setup > Customize

| Banners   Portals   CSS        |   |  |
|--------------------------------|---|--|
| Name                           | Title   |  |
| <a href="#">AlertHome</a>      | Public alerts page.   |  |
| <a href="#">AllServices</a>    | Displayed when the Customer selects Service Catalog page under Services Tab . |  |
| <a href="#">CustomerForums</a> | Displayed when the Customer Selects Forums Tab.                               |  |
| <a href="#">ForumsHome</a>     | Public forums page.   |  |
| <a href="#">Items</a>          | Displayed when the Customer Selects Items Tab.                                |  |
| <a href="#">KnowledgeHome</a>  | Public knowledge page.  |  |
| <a href="#">Login</a>          | Displayed on the main login page.   |  |
| <a href="#">Logout</a>         | Displayed when the user logs out.   |  |
| <a href="#">OutagesHome</a>    | Public outages page.  |  |
| <a href="#">PlannedHome</a>    | Public planned outages page.  |  |
| <a href="#">Requests</a>       | Displayed when the Customer Selects Requests Tab.                             |  |
| <a href="#">SelfHelp</a>       | Displayed when the Customer Selects Self Help Tab.                            |  |
| <a href="#">Services</a>       | Displayed when the Customer Selects Services Tab.                             |  |
| <a href="#">Sspr</a>           | Displayed on the main login page.   |  |
| <a href="#">SurveyHome</a>     | Online surveys page.  |  |
| <a href="#">Welcome</a>        | Displayed when the Customer has logged in.                                    |  |

2. Select the Name hyperlink  
The HTML editor appears.



3. Edit the message as required
4. 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](#).

## Email Parameters

The drop-down options included in the Email Parameters lists used within the Full Email Templates throughout the application, are drawn from the following parts of the system:

Parameter options for Account Information, LDAP Information, Password Information templates:

| Parameter    | Source  |
|--------------|---|
| Account Type | The Default User Role derived from the Customer or User information screen. |
| First Name   | Derived from Customer or User information screen.                           |



| Parameter | Source  |
|-----------|---|
| Full Name | Derived from Customer or User information screen and combines the First and Last Name.  |
| Password  | Derived from Customer or User information screen.   |
| Title     | Derived from Customer or User information screen.<br><br><b>NOTE:</b> This option is visible if Enable Titles is selected within the Admin>Setup>Privileges>Customer. |
| Username  | Derived from Customer or User information screen.   |

Parameters for the request, Approve Change, Approve Service Request, Closed, Closed Timeout templates:

| Parameter              | Source   |
|------------------------|--|
| Classification         | Drawn from the Classification field, in the Summary tab of a request.  |
| Close Date             | Shows the Close Date as recorded in the Service Terms information of the request.  |
| Country                | Derived from the Country field window in the Customer Tab of a request.  |
| Customer Name          | Derived from the Customer Field in the Summary tab of a request.   |
| Customer Phone         | Derived from the Contact Phone Field in the Summary tab of a request.  |
| Customer Room          | Derived from the Item Room Field in the Summary tab of a request.  |
| Date Style             | Detail drawn from the Admin>Setup>Privileges>Customer tab.   |
| Due Date               | Derived from the Service Terms window in the Summary Tab of a request.   |
| Email Locale           | Derived from the Contact tab of the Customer Information details.  |
| FSC Date               | Derived from the Service Terms window in the Summary Tab of a Change Request.  |
| Handshaking Close Days | Derived from the Org Unit associated with the Customer or number of default days defined in the Setup>Privileges>Requests tab. |
| Identifier             | Derived from the Item Identifier Field in the Summary tab of a request.  |
| Item #                 | The Item Number is derived from the Item details recorded in the Customer Tab of a request.                                    |

| Parameter           | Source   |
|---------------------|--|
| Item Type           | The Item Type is derived from the Item details recorded in the Customer Tab of a request.  |
| Last Note ID        | Shows the system generated Note identification number as a hyperlink, for the Note last added to a request. When clicked by the Customer or User, defaults to the request information screen for that request inside the system. |
| Notes               | Details the number of Notes added to a request.  |
| Open Date           | Derived from the Service Terms window in the Summary Tab of a request.   |
| Org Unit            | Derived from the Org Unit field window in the Customer Tab of a request.   |
| Priority            | Derived from the Priority Details as recorded in the Summary tab of a request.   |
| Process             | Shows if the request is a Service Request, Incident, Problem or Change.  |
| Request Description | Derived from the initial Description entered for the request, as recorded in the Summary tab.  |
| Request Id          | Shows the system generated request identification number.  |
| Request URL         | Shows the request identification number as a URL to allow the Customer to enter the system within the specific request screen by clicking the URL.   |
| Subject             | Derived from the Subject entered for the request that is populated from an Email Subject line or directly into the application, and recorded in the Summary tab.   |
| Team                | Shows the Team assigned to manage the request.   |
| Team Phone          | Display the Team telephone number as recorded in the Team Information screen.  |
| Technician Name     | Shows the name of the Technician assigned to the request.  |
| Title               | Derived from Customer or User information screen.<br><br><b>NOTE:</b> This option is visible if Enable Titles is selected within the Admin>Setup>Privileges>Customer.  |

Parameter available in Contract Time templates:

| Parameter | Source  |
|-----------|---|
| Threshold | Draws the percentage from the Threshold field in the Setup>Billing>Contracts tab. |

Options for the Invoice templates:

| Parameter                               | Source  |
|---|---|
| Adjustment                              | Drawn from the Cost Calculations field, and is the amount that is deducted from the sub-total.  |
| Customer Name                           | Derived from the Customer Details Name field on the invoice.  |
| Customer Title                          | Derived from Customer Information screen.<br><br><b>NOTE:</b> This option is visible if Enable Titles is selected within the Admin>Setup>Privileges>Customer. |
| Delivery Status                         | Shows the assigned Delivery Status from the Invoice.  |
| Due Date                                | Drawn from the Order Details of the invoice.  |
| Entered By                              | Drawn from the Order Details of the invoice.  |
| Invoice #                               | Shows the system generated Invoice Number.  |
| Invoice Date                            | Drawn from the Order Details of the invoice.  |
| Invoice Status                          | Derived from the Status field of the invoice.   |
| Line Items Total                        | Derived from the Costs section of the Invoice and shows the overall cost for Items on the invoice.  |
| List of Item Type Line Items            | When Items are associated with an invoice, shows the details recorded in the Item Type field.   |
| List of Maintenance Contract Line Items | When Contracts are associated with an invoice, shows the details recorded in the Contract Type Name field.  |
| Notes                                   | Shows any details recorded in the Notes field of the invoice.   |
| Order Date                              | Drawn from the Order Details and shows the date the invoice was received.   |
| Org Unit                                | Derived from the Customer Details and shows the customer's associated Org Unit.   |
| PO Number                               | Drawn from the Order Details and shows the Purchase Order number associated with the invoice.   |
| Payment Date                            | Shows date of payment for the invoice based on details recorded in the Invoice Status section.  |
| Payment Status                          | Shows if payment has been received for the invoice based on details recorded in the Invoice Status section.   |
| Processed By                            | Drawn from the Order Details and shows the name of the User who processed payment of the invoice.   |
| Shipping                                | Shows the Shipping Costs as derived from the Costs section of the invoice.  |

| <b>Parameter</b>     | <b>Source</b>   |
|----------------------|---|
| Shipping Date        | Derived from the Status section of the invoice and shows the expected shipping date of goods. |
| Tax                  | Drawn from the Costs Section and shows the tax applied to the invoice.                        |
| Tax Rate             | Drawn from the Costs Section and shows the tax rate applied to the invoice.                   |
| Terms and Conditions | Shows details recorded in the Terms and Conditions field of the invoice.                      |
| Total                | The Grand Total of the Invoice, including tax and any adjustments.                            |
| Tracking Number      | Drawn from the Tracking Number field within the Status section of the Invoice.                |

Parameters for the Item Status Change template:

| <b>Parameter</b> | <b>Source</b>   |
|------------------|---|
| Category         | Shows the Item Category from the Item Information tab.                              |
| Criticality      | Shows the assigned Criticality of the Item as recorded in the Item Information tab. |
| Item Number      | Shows the Item Number as recorded in the Item Information tab.                      |
| Item Type        | Details the Item Type as entered in the Item Information tab.                       |
| Status           | Shows the Status of the Item as recorded in the Item Information tab.               |

Parameter for the New Attachment template:

| <b>Parameter</b> | <b>Source</b>  |
|------------------|--|
| File Name        | Allows the file name of the newly received attachment to be included in the email to the User. |

Parameters for the Escalation templates:

| <b>Parameter</b>    | <b>Source</b>  |
|---------------------|--|
| Current Technician  | Shows the name of the newly assigned Technician.   |
| Previous Technician | Shows the name of the Technician who was previously assigned the request.                  |
| Process             | Shows the ITIL Process of the request, i.e., Change, Incident, Problem or Service Request. |
| Request ID          | Shows the Request identification number.   |

Parameters for the request Status update templates:

| <b>Parameter</b> | <b>Source</b>  |
|------------------|--|
| New Status       | Shows the details of the newly assigned Workflow State.                                    |
| Previous Status  | Shows the Status name of the previously assigned to the request.                           |
| Process          | Shows the ITIL Process of the request, i.e., Change, Incident, Problem or Service Request. |
| Request ID       | Shows the Request identification number.   |

Parameters for the SLA templates:

| <b>Parameter</b> | <b>Source</b>  |
|------------------|--|
| Hr/Min           | Shows the time as recorded in hours or minutes, based on the SLA configuration.            |
| Name             | Shows the name of the SLA.   |
| Phase            | Shows the SLA phase of Response Time, Restoration Time or Resolution Time.                 |
| Process          | Shows the ITIL Process of the request, i.e., Change, Incident, Problem or Service Request. |
| Time Elapsed     | Shows the amount of time passed for the phase of the SLA.                                  |
| Time Limit       | Shows the amount of total time associated with the phase of the SLA.                       |

Parameters for the Survey templates:

| Parameter           | Source   |
|---------------------|--|
| Description         | Shows the content included in the Description field of the survey. |
| Name                | Shows the Title of the survey.                                     |
| Number of Questions | Shows the number of questions included in the survey.              |

## Email Summary Templates

Automated email messages sent in relation to requests, Knowledge Base Articles, Items, Invoices and Contracts include a summary table of information or template. The information included in these tables, parameters, look and feel are configured within the Email Summary Templates filter screen of the Templates tab.

Knowledge of HTML would be useful when customizing the templates, but is not mandatory.

**Email**

Server Setup **Templates** SMS Log

Email Summary Templates ▼

| Name           | Content   |
|----------------|---|
| ArticleSummary | <p><b>{{Article Type}} Information</b></p> <p><b>{{Article Type}} #:</b> {{Article ID}}</p> <p><b>Created:</b> {{Created}}</p> <p><b>Overview:</b> {{Overview}}</p> <p><b>Content:</b> {{Content}}</p>  |
| GroupSummary   | <p><b>Group Information</b></p> <p><b>Group #:</b> {{Group #}}</p> <p><b>Start Date:</b> {{Start Date}}</p> <p><b>Status:</b> {{Status}}</p> <p>{{List of Active Requests}}</p>   |
| InvoiceSummary | <p><b>Invoice Information</b></p> <p><b>Invoice #:</b> {{Invoice #}}</p> <p><b>Invoice Status:</b> {{Invoice Status}}</p> <p><b>Order Date:</b> {{Order Date}}</p> <p><b>Invoice Date:</b> {{Invoice Date}}</p> <p><b>Shipping Date:</b> {{Shipping Date}}</p> <p><b>Due Date:</b> {{Due Date}}</p> <p><b>Payment Date:</b> {{Payment Date}}</p> <p><b>Delivery Status:</b> {{Delivery Status}}</p> |

The templates for messages that can be configured within this screen include:

| <b>Message</b>        | <b>Description</b>   |
|-----------------------|--|
| Article Summary       | Email that notifies User about the pending Review date of a Knowledge Base Article.  |
| Group Summary         | Email sent to the Users when a Request Group is created, updated or closed.  |
| Invoice Summary       | Email sent to a Customer that summarizes their Invoice information and included in all correspondence regarding the Invoice. This is forwarded with the InvoicePrefix content that is configured in the Email>Templates>Full Email Templates filter view.<br><br>This template is also used for the email sent to Customers when the Setup>Billing>Contracts option is enabled and the number of days for the Subscription "Contract Renewal Time" is triggered. |
| Item Summary          | Email sent to a Customer when a Service Item moves into an inactive State, when the email notification option is selected within the Item.   |
| MaintContract Summary | Email sent to a Customer including their service maintenance contract details.   |
| Request Summary       | Email sent to Users when a request is created or updated.  |
| Survey Summary        | The survey summary template is included in system generated emails regarding survey notification and reminders.  |

To customize the message template:

1. Select Setup > Email > Templates
2. Select the Email Summary Templates filter
3. Click the Template Name hyperlink

The HTML editor appears.

4. Modify the table, as required

As part of the customization, the Administrator can use system parameters included in the Insert Parameter drop down list. Using these options ensures the customized template includes the correct format for the information to be sent in the email.

| <b>Icon</b>      | <b>Description</b>   |
|------------------|--|
| Insert Parameter | The drop-down list options ensure that the HTML correct format is used for these details to be included on the customized message. |
| Restore Defaults | Restores the System default email message.   |

5. Adjust the Date Style format, if relevant
6. Click Save.

## Template Field Options

### ArticleSummary

This template is included in the system generated emails for Knowledge Base Article reviews.

| Field         | Source  |
|---------------|---|
| Article ID    | Knowledge Base Article number.                                |
| Article Title | Displays content drawn from the Title field.                  |
| Article Type  | Shows if it is a general Article, Solution Workaround or FAQ. |
| Content       | Drawn from the Title field of a KBA.                          |
| Created       | Displays the date the Article was created.                    |
| Overview      | Derived from the Problem field of a KBA.                      |

### GroupSummary

This template is included in system generated emails when a request group is created, updated and closed.

| Field                   | Source  |
|-------------------------|---|
| Description             | Derived from the Description field on the Details tab of a requests group.          |
| Group #                 | The identifying group number generated by the system for the request group.         |
| List of Active Requests | Indicates the number of requests in an Active State contained in the request group. |
| Name                    | Drawn from the Name field on the Details tab of a request group.                    |
| Start Date              | Is derived from the date that a request group is created.                           |
| Status                  | Derived from the Status field on the Details tab of a request group.                |

### InvoiceSummary

The Invoice Summary template is used when the Email button is selected within the Invoice Editor screen and when an Invoice is created and updated.



| Field                                   | Source  |
|---|---|
| Adjustment                              | Drawn from the Cost Calculations field, and is the amount that is deducted from the sub-total.  |
| Customer Name                           | Derived from the Customer Details Name field on the invoice.  |
| Customer Title                          | Derived from Customer Information screen.<br><br><b>NOTE:</b> This option is visible if Enable Titles is selected within the Admin>Setup>Privileges>Customer. |
| Delivery Status                         | Shows the assigned Delivery Status from the Invoice.  |
| Due Date                                | Drawn from the Order Details of the invoice.  |
| Entered By                              | Drawn from the Order Details of the invoice.  |
| Invoice #                               | Shows the system generated Invoice Number.  |
| Invoice Date                            | Drawn from the Order Details of the invoice.  |
| Invoice Status                          | Derived from the Status field of the invoice.   |
| Line Items Total                        | Derived from the Costs section of the Invoice and shows the overall cost for Items on the invoice.  |
| List of Item Type Line Items            | When Items are associated with an invoice, shows the details recorded in the Item Type field.   |
| List of Maintenance Contract Line Items | When Contracts are associated with an invoice, shows the details recorded in the Contract Type Name field.  |
| Notes                                   | Shows any details recorded in the Notes field of the invoice.   |
| Order Date                              | Drawn from the Order Details and shows the date the invoice was received.   |
| Org Unit                                | Derived from the Customer Details and shows the customer's associated Org Unit.   |
| PO Number                               | Drawn from the Order Details and shows the Purchase Order number associated with the invoice.   |
| Payment Date                            | Shows date of payment for the invoice based on details recorded in the Invoice Status section.  |
| Payment Status                          | Shows if payment has been received for the invoice based on details recorded in the Invoice Status section.   |
| Processed By                            | Drawn from the Order Details and shows the name of the User who processed payment of the invoice.   |
| Shipping                                | Shows the Shipping Costs as derived from the Costs section of the invoice.  |

| <b>Field</b>         | <b>Source</b>   |
|----------------------|---|
| Shipping Date        | Derived from the Status section of the invoice and shows the expected shipping date of goods. |
| Tax                  | Drawn from the Costs Section and shows the tax applied to the invoice.                        |
| Tax Rate             | Drawn from the Costs Section and shows the tax rate applied to the invoice.                   |
| Terms and Conditions | Shows details recorded in the Terms and Conditions field of the invoice.                      |
| Total                | The Grand Total of the Invoice, including tax and any adjustments.                            |
| Tracking Number      | Drawn from the Tracking Number field within the Status section of the Invoice.                |

### **ItemSummary**

This template is included in system generated emails for Item Status changes:

| <b>Field</b> | <b>Source</b>   |
|--------------|---|
| Category     | Shows the Item Category from the Item Information tab.                              |
| Criticality  | Shows the assigned Criticality of the Item as recorded in the Item Information tab. |
| Item Number  | Shows the Item Number as recorded in the Item Information tab.                      |
| Item Type    | Details the Item Type as entered in the Item Information tab.                       |
| Status       | Shows the Status of the Item as recorded in the Item Information tab.               |

### **MaintContractSummary**

This template is included in system generated emails regarding the creation and update of service contracts.

| <b>Field</b>  | <b>Source</b>   |
|---------------|---|
| Contract #    | Shows the system generated Contract Number.                       |
| Contract Type | Specifies if the Contract is a Per Incident or Per Item Contract. |
| End Date      | Includes the date the current Contract date ends.                 |
| Invoice #     | Shows the system generated Invoice Number.                        |
| Remaining     | Shows the amount of time remaining on a Contract.                 |

| <b>Field</b> | <b>Source</b>  |
|--------------|--|
| SLA          | Includes the name of the SLA included as part of the Contract. |
| Start Date   | Shows the commencement date of the current valid Contract.     |

### ***MaintContractSummaryByMonth***

This template is included in system generated emails regarding the creation and update of service contracts that are automatically renewed on a monthly or quarterly basis.

| <b>Field</b>        | <b>Source</b>   |
|---------------------|---|
| Contract #          | Shows the system generated Contract Number.                       |
| Contract Type       | Specifies if the Contract is a Per Incident or Per Item Contract. |
| End Date            | Includes the date the current Contract date ends.                 |
| Interval End Date   | Shows the contract.   |
| Interval Remaining  | Shows the contract.   |
| Interval Start Date | Shows the contract.   |
| Invoice #           | Shows the system generated Invoice Number.                        |
| Remaining           | Shows the amount of time remaining on a Contract.                 |
| SLA                 | Includes the name of the SLA included as part of the Contract.    |
| Start Date          | Shows the commencement date of the current valid Contract.        |

### **OutageSummary**

This template is included in system generated emails related to Planned Outages.

| <b>Field</b>            | <b>Source</b>  |
|-------------------------|--|
| Outage Items            | Shows the details of Items associated with the Outage.                 |
| Outage Reason           | Displays the content of Reason field in the Outage information screen. |
| Outage Related Requests | Shows Requests related to the Outage.                                  |
| Outage Schedule         | Details the Start and End Date of the Outage.                          |

## RequestSummary

The request summary template is included in emails relating to the creation, update and closure of requests.

| Field                  | Source   |
|------------------------|--|
| Classification         | Drawn from the Classification field, in the Summary tab of a request.  |
| Close Date             | Derived from the Service Terms window in the Summary Tab of a request.   |
| Country                | Derived from the Country field window in the Customer Tab of a request.  |
| Customer Name          | Derived from the Customer Field in the Summary tab of a request.   |
| Customer Phone         | Derived from the Contact Phone Field in the Summary tab of a request.  |
| Customer Room          | Derived from the Item Room Field in the Summary tab of a request.  |
| Date Style             | Detail drawn from the Admin>Setup>Privileges>Customer tab.   |
| Due Date               | Derived from the Service Terms window in the Summary Tab of a request.   |
| Email Locale           | Derived from the Customer Information details screen and defines the language used by emails sent from the system.   |
| FSC Date               | Derived from the Service Terms window in the Summary Tab of a Change Request.  |
| Handshaking Close Days | Drawn from the Admin>Setup>Privileges>System, unless overridden by the number of days defined in the Super>User> OrgUnit>Details tab.  |
| Identifier             | Derived from the Item Identifier Field in the Summary tab of a request.  |
| Item #                 | The Item Number is derived from the Item details recorded in the Customer Tab of a request.  |
| Item Type              | The Item Type is derived from the Item details recorded in the Customer Tab of a request.  |
| Last Note Id           | Shows the system generated Note identification number as a hyperlink, for the Note last added to a request. When clicked by the Customer or User, defaults to the request information screen for that request inside the system. |
| Notes                  | Details the number of Notes added to a request.  |

| <b>Field</b>        | <b>Source</b>   |
|---------------------|---|
| Open Date           | Derived from the Service Terms window in the Summary Tab of a request.  |
| Org Unit            | Derived from the Org Unit field window in the Customer Tab of a request.  |
| Priority            | Derived from the Priority Details as recorded in the Summary tab of a request.  |
| Process             | Shows if the request is a Service Request, Incident, Problem or Change.   |
| Request Description | Derived from the initial Description entered for the request, as recorded in the Summary tab.   |
| Request Id          | Shows the system generated request identification number.   |
| Request URL         | Shows the system generated request identification number as a hyperlink. When clicked by the Customer or User, defaults to the request information screen for that request inside the system. |
| Subject             | Derived from the Subject entered for the request that is populated from an Email Subject line or directly into the application, and recorded in the Summary tab.                              |
| Team                | Shows the Team assigned to manage the request.  |
| Team Phone          | Display the Team telephone number as recorded in the Team Information screen.   |
| Technician Name     | Shows the name of the Technician assigned to the request.   |

### **SurveySummary**

The survey summary template is included in system generated emails regarding survey notification and reminders.

| <b>Field</b>        | <b>Source</b>   |
|---------------------|---|
| Description         | Drawn from the Survey Description Field.              |
| Name                | Displays the Name given to the Survey.                |
| Number of Questions | Shows the number of questions included on the Survey. |

## Keywords

Keywords are used by the system to identify how to handle inbound and outbound email from the system.

The following table includes a list of all Keywords that are used by the system, which can be customized, and where they appear in the application:

| Keyword        | Direction           | Description   |
|----------------|---------------------|---|
| Accept         | Inbound             | Accept or Yes is used to Approve Requests and must be included in the approval email.   |
| Accepted       | Outbound            | Included in Subject line for emails generated when a request has been accepted and sent to the person responsible managing the approval.            |
| AddToGroup     | Outbound            | Not Used.   |
| Article        | Outbound            | Included in the Subject line of emails sent to Customers including an Knowledge Base Articles.  |
| Author         | Outbound            | Included in content of Forum update message.  |
| AutoReply      | Outbound            | Included in the Subject line of emails for error messages.  |
| ChangeRequest  | Inbound<br>Outbound | Customer must include in email Subject line when updating a Change Request.<br><br>Automatically included in Subject line of Change Request emails. |
| ChatLog        | Outbound            | Used in the Subject line of emails sent to Customer with a copy of a chat transcript.   |
| Classification | Inbound             | Included in Subject line with keyword "Item" e.g. Item Classification. Cannot be used alone.  |
| Closed         | Outbound            | Included in Subject line of email responding to request, e.g. Incident Closed.  |
| Contract       | Outbound            | Used in Subject line regarding Contract activity (i.e, Contract Active or Contract Low).  |

| <b>Keyword</b> | <b>Direction</b>    | <b>Description</b>  |
|----------------|---------------------|---|
| Created        | Outbound            | Included in Subject line of email responding to creation of a request, e.g. Request (or Invoice) Created.   |
| Customer       | Outbound            | Keyword in Subject line of email regarding a Contract status, e.g. Customer Name Contract Active  |
| DeEscalated    | Outbound            | Included in Subject line of email to User regarding a request being de-escalated.   |
| Deleted        | Outbound            | Included in Subject line of email regarding a deleted request (or Invoice), e.g. Request Deleted.   |
| Delivered      | Outbound            | Included in Subject line of email regarding an Invoice, e.g. Item Delivered.  |
| Details        | Outbound            | Included in Subject line of email responding to a request, e.g. Request (or Invoice) Details.   |
| Escalated      | Outbound            | Included in Subject line of email responding to request, e.g. Request Escalated.  |
| Forum          | Outbound            | Keyword in Subject line e.g. Forum Update   |
| Group          | Outbound            | Not used  |
| Hours          | Inbound & Outbound  | Used in emails when the system refers to hours. For example, SLA and Contract emails.   |
| Incident       | Inbound<br>Outbound | Customer must include in Subject line, when updating an Incident.<br><br>Automatically included in Subject line for emails generated regarding Incidents.   |
| IncidentQueue  | Outbound            | Inserted as the technician name when a request is assigned to the request Queue and the Technician Name is configured as a parameter in the outgoing email. |
| Invoice        | Outbound            | Keyword in Subject line, e.g. Invoice Created (or Details/ Deleted/Delivered).  |

| <b>Keyword</b>  | <b>Direction</b>   | <b>Description</b>  |
|-----------------|--------------------|---|
| Item            | Inbound            | Keyword in Subject line, e.g. Item Classification.  |
|                 | Outbound           | Keyword in Subject line e.g. Item # Contract Active, or Item # Status Update  |
| Minutes         | Inbound & Outbound | Used in emails when the system refers to minutes. For example, SLA and Contract emails.   |
| NewNote         | Outbound           | Included in content of email advising that a new Note has been added to a request.  |
| NewSolution     | Outbound           | Not used.   |
| No              | Inbound            | Reject or No is used to Reject Requests and must be included in the rejection email.  |
| OrgUnit         | Outbound           | Keyword in Subject line of email regarding contract status, e.g. OrgUnit Name Contract Active   |
| PlannedOutage   | Outbound           | Included in Subject line of automated email notifications about planned Item outages.   |
| Prefix          | Inbound & Outbound | Included as prefix in email subject line.   |
| Problem         | Outbound           | Automatically included in Subject line for emails generated regarding Service Requests.   |
| Reassigned      | Outbound           | Included in the Subject line of emails sent regarding reassigned requests.  |
| ReceivedMessage | Outbound           | Included in content of email replying to Customer attempting to update a request that has already been closed. (Subject line Request closed.) |
| Reject          | Inbound            | Reject or No is used to Reject Requests and must be included in the rejection email.  |
| Rejected        | Outbound           | Included in Subject line for emails generated when a request has been rejected and sent to the person responsible managing the approval.      |



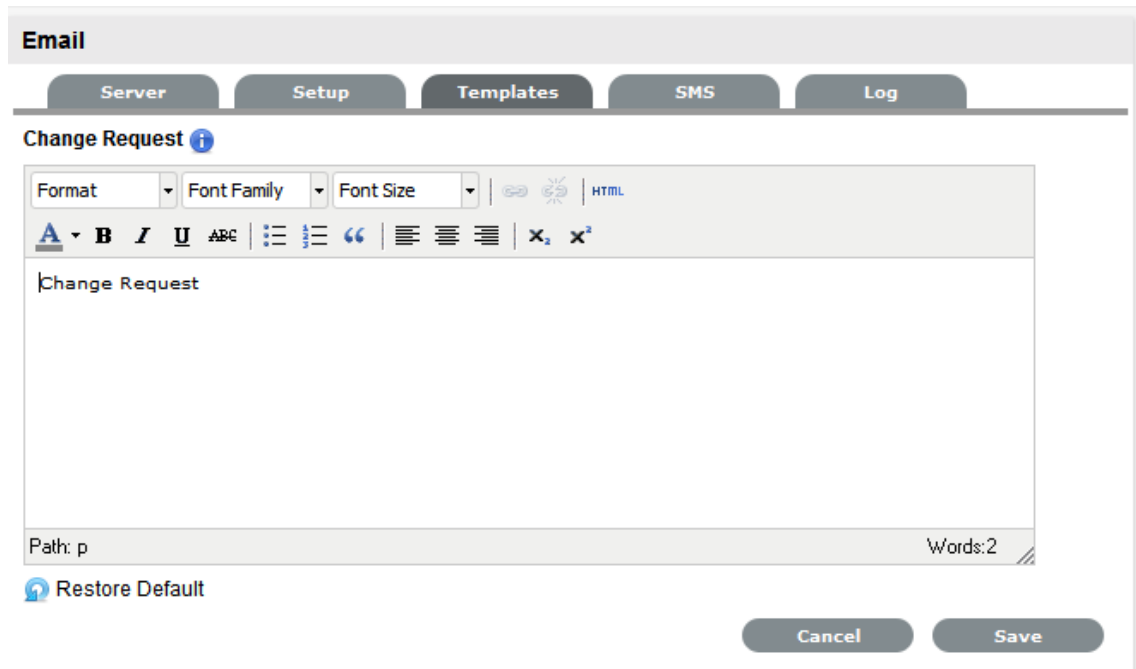
| <b>Keyword</b>  | <b>Direction</b>    | <b>Description</b>   |
|-----------------|---------------------|--|
| Reminder        | Outbound            | Reminding the Manager to process a Request that is waiting for approval.   |
| Resolution      | Outbound            | Included in Subject line for emails generated regarding SLA Resolution times.  |
| Resolved        | Outbound            | Included in Subject line for emails generated regarding SLA Resolution times.  |
| Response        | Outbound            | Included in Subject line for emails generated regarding SLA Response times.  |
| Restoration     | Outbound            | Included in Subject line for emails generated regarding SLA Restoration times.   |
| ReviewReminder  | Outbound            | In Subject line of email reminding User to review Article,<br>e.g. ReviewReminder Article #  |
| Service Request | Inbound<br>Outbound | Customer must include in Subject line, when updating a Service Request.<br><br>Automatically included in Subject line for emails generated regarding Service Requests. |
| SolutionCreated | Outbound            | Included in Subject line of email to Customer when a solution has been created for an open request.  |
| SolutionFound   | Outbound            | Included in Subject line of email to Customer when a solution has been found and applied to an open request.   |
| Status          | Outbound            | Included in Subject line for emails regarding , e.g. Item # Status Update  |
| SystemWarning   |                     | Outbound: Warning of unpaid invoice.   |
| Unknown         | Outbound            | Used in emails when the value of parameters selected for inclusion are not known.  |
| Unpaid          | Outbound            | Warning of unpaid invoice.   |
| Updated         | Outbound            | Included in Subject line of email, e.g. Request Updated.   |

| Keyword | Direction | Description   |
|---------|-----------|---|
| Yes     | Inbound   | Accept or Yes is used to Approve Requests and must be included in the approval email. |

## Customize Keywords

To allow the system to recognize an alternative word for a System Keyword:

1. Select Setup>Email>Templates
2. Choose the Keywords filter view
3. Click on the relevant Name hyperlink



4. Enter the customized word
5. Click Save.

## Error Messages

Error Messages are automatically generated and sent by the system in relation to various application activities. The following table includes details for when each Error Message is used by the system:

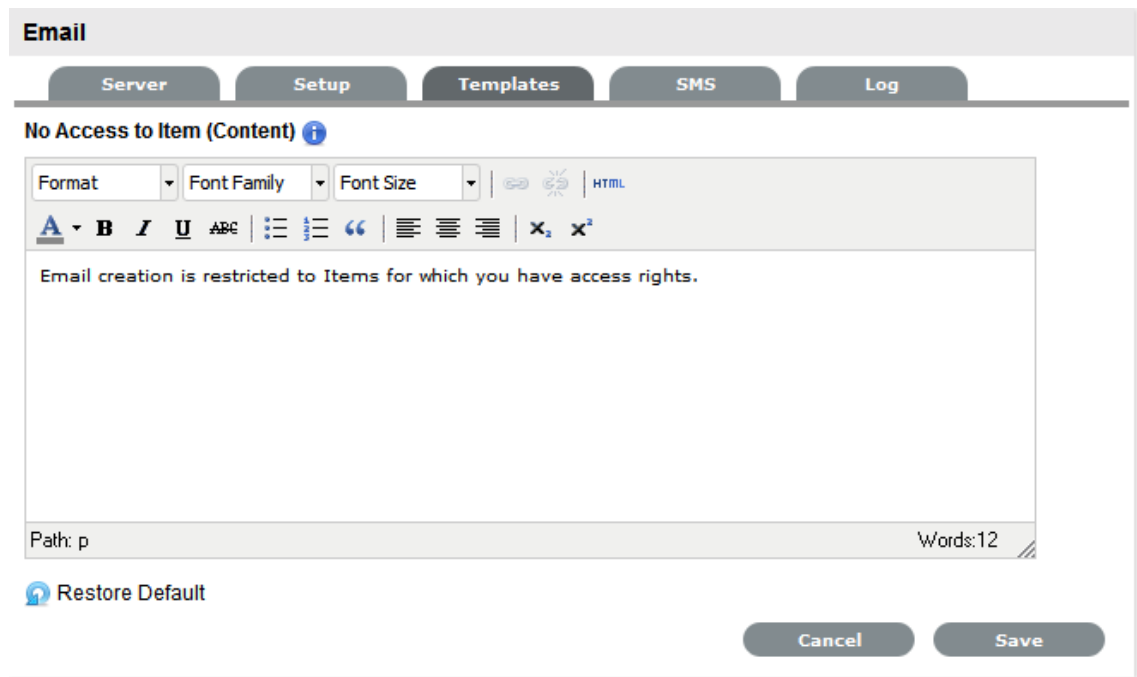
| Message                 | Description   |
|-------------------------|---|
| ApprovalRequiredContent | The main content of an email sent to a Customer attempting to edit request, which is currently in "Approval" State. Such requests cannot be edited until approval is given. |

| <b>Message</b>              | <b>Description</b>  |
|-----------------------------|---|
| ApprovalRequiredSubject     | Email Subject Line content for ApprovalRequiredContent emails.  |
| InvalidTeam                 | The main content of an email sent regarding the system receiving an email including an address and name of Team that does not match. For example, email may have been intended for Change Team but used Incident Team address, or vice versa. |
| NoAccessToItemContent       | The main content of an email sent when the system receives an request via email that includes an Item# in the Subject line that the Customer does not have access.  |
| NoAccessToItemSubject       | The Subject Line of an email sent when the system receives an request via email that includes an Item# in the Subject line that the Customer does not have access.  |
| NoIncidentFoundContent      | The main content of an email sent by the system when it cannot find the Incident # referred to in the email.  |
| NoIncidentFoundSubject      | Email Subject Line content for NoIncidentFoundContent emails.   |
| NoPermissionChangeContent   | The body of the email sent when a Customer tries to log a Change Request via email and the "Create Change Requests" option is disabled in the Admin>Setup>Privileges>Customer tab.  |
| NoPermissionChangeSubject   | The Subject line content included on NoPermissionChangeContent emails.  |
| NoPermissionIncidentContent | The body of the email sent when a Customer tries to log an Incident via email and the "Create Incidents" option is disabled in the Admin>Setup>Privileges>Customer tab.   |
| NoPermissionIncidentSubject | The Subject line content included on NoPermissionIncidentContent emails.  |
| NoPermissionProblemContent  | The body of the email sent when a Customer sends a request a Problem Management Team.   |
| NoPermissionProblemSubject  | The Subject line content included on NoPermissionProblemContent emails.   |
| NoPermissionRequestContent  | The body of the email sent when a Customer tries to log a Service Request via email and the Create Service Requests option is disabled in the Admin>Setup>Privileges>Customer tab.  |
| NoPermissionRequestSubject  | The Subject line content included on NoPermissionRequestContent emails.   |

| Message                     | Description  |
|-----------------------------|--|
| NoServiceIncidentContent    | The content of the email sent when a Customer tries to log an Incident for a Service by including the Item# in the Subject line of their email addressed to the Incident Team, and the "Service Incident" option is disabled in the Admin>Setup>Privileges>Customer tab.                         |
| NoTeamFound                 | The main content of an email sent by the system when it receives an email sent a Team email address that is not in the system.   |
| NoUserFound                 | The Subject Line included on the NoAccount emails.<br><br><b>NOTE:</b> The content for emails sent by the system when it receives emails from addresses that do not exist in the system, i.e., NoAccount email, can be configured in the Full Email Templates filter of the Email>Templates tab. |
| RequestCreationErrorContent | The system generated email sent when an error occurs during the creation of request. An example of an error would be if the database becomes unavailable during the request creation process.  |
| RequestCreationErrorSubject | The Subject line content included on the RequestCreationErrorContent email.  |
| UnauthorizedApprove         | The email sent when a Manager sends email attempting to approve change but does not have approval permission enabled.  |
| UnrecognizedAction          | The email sent when a Manager sends an email attempting to accept or reject a Change but does not use the keywords YES or ACCEPT, NO or REJECT.  |

To edit a Message:

1. Click on the required message name link



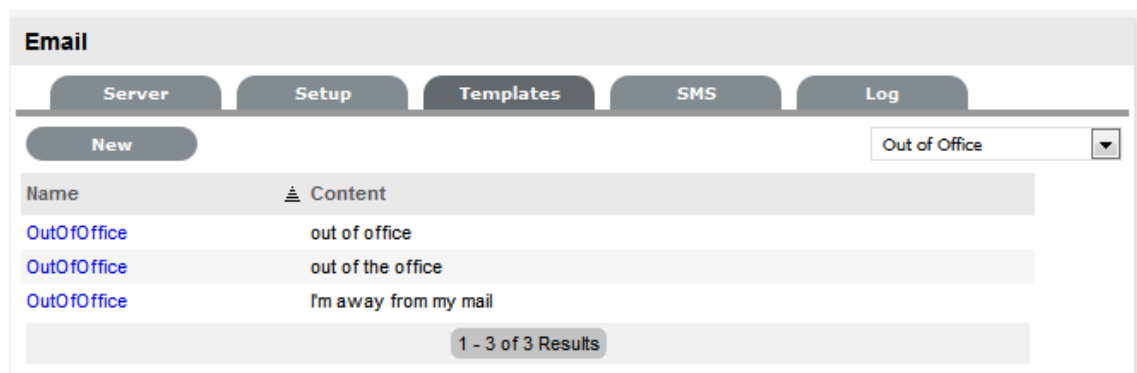
2. Update the message content
3. Click Save.

## Out of Office

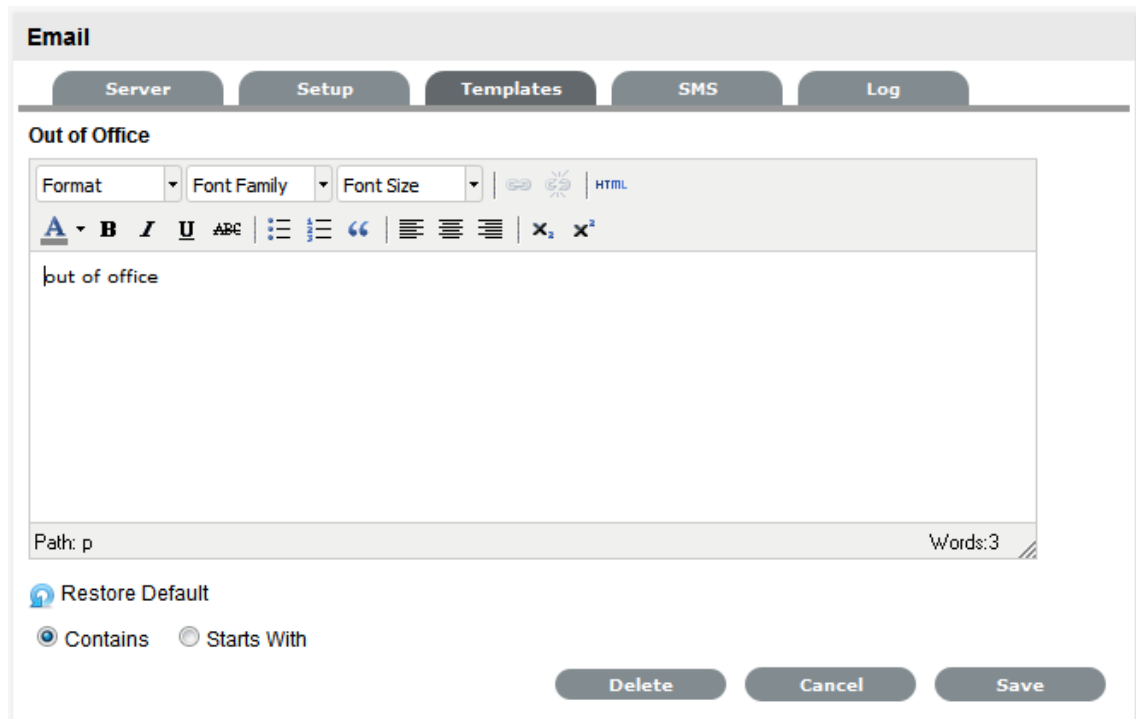
Users can customize multiple Out of Office options within the application, which allows the system to identify incoming email Subject lines with this message in different languages. The system will ignore emails with this content in the Subject line of emails.

To add or edit out of office messages as an Administrator:

1. Go to the Setup tab
2. Move to the Email>Templates tab



3. Select the Out of Office option
4. Click New or select the relevant message link
5. Add or amend the Subject line content that is to be identified by the system



6. Click Save.

## SMS Templates

The templated text and parameters for SMS messages sent from the system regarding requests and Item outages are configured within the SMS Templates filter screen of the Templates tab.

Template can be customized for the following messages sent from by the system:

---

### SMS Templates

|                          |   |
|--------------------------|---|
| ApproveChangeSMS         | Message sent to Managers when an RFC moves to an Approval State.  |
| ApproveServiceRequestSMS | Message sent to Managers when a Service Request moves into an Approval State.   |
| ClosedRequestSMS         | Included at the beginning of the email when a request is closed.  |
| ClosedTimeoutSMS         | Used by the handshake facility and prefaces emails sent as Incident Note using the Propose button.  |
| CloseRequestLinkSMS      | Message sent with the hyperlink to enable Customers to keep a request open after a possible solution has been sent to them. If the Customer clicks on the link, the automated close process is deactivated. |
| CloseRequestSMS          | Message sent when the handshaking facility is applied and the Technician proposes a Solution to the Customer.   |

---

---

## SMS Templates

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|   |   |
|---|---|
| CreateRequestSMS                            | Message sent to a Customer when a request is created.   |
| DeleteRequestSMS                            | SMS sent to a User when a request is deleted.   |
| GroupCreateSMS                              | SMS sent to a User when a request group has been created in the system.   |
| InvoicePrefixSMS                            | Message sent to a Customer with a newly created Invoice.  |
| ItemStatusChangeSMS                         | SMS sent to a Customer when an Item Status is changed.  |
| NewAttachmentToTechSMS                      | SMS sent to a Technician when a Customer uploads an attachment to a request in the Customer Portal.   |
| NoteClosedPrefixSMS                         | SMS sent to when a new Note is added to a closed request.   |
| NoteClosedSMS                               | Sent to a Customer when they have attempted to a Note to a request that is already closed.  |
| NotePrefixSMS                               | Sent each time a new Note is associated with an existing request.   |
| PlannedOutageSMS                            | Included in the SMS sent when an Item is scheduled to be taken offline.   |
| RequestDeescalate<br>FromToSMS              | Message sent when a request is manually de-escalated this message is sent to the newly assigned Technician.   |
| RequestDeescalate<br>NotAvailableSMS        | Message sent when a request is manually de-escalated this message is sent to the previously assigned Technician to let them know that the request is no longer available for them to work on. |
| RequestEscalateFromToSMS                    | Message sent when a request is manually escalated this message is sent to the newly assigned Technician.  |
| RequestEscalateNot<br>AvailableSMS          | Message sent when a request is manually escalated this message is sent to the previously assigned Technician to let them know that the request is no longer available for them to work on.    |
| RequestReassignedManager<br>PrefixSMS       | This message is sent when the Manager responsible for processing the approval of a request is changed and is sent to the previously assigned Manager.   |
| RequestReassignedManager<br>ToTechPrefixSMS | The message included in an email when a request moves from a Manager Approval State to the newly assigned Technician User.  |
| RequestReassignPrefixSMS                    | When a request is reassigned this message is sent with the request details to the previously assigned User.   |

---

---

## SMS Templates

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|                            |  |
|----------------------------|--|
| RequestReassignToPrefixSMS | When a request is reassigned this message is sent with the request details to the newly assigned User.   |
| RequestStatusChanged       | The content of an email sent when the Status of a request is moved from Pending-No Contract to the default open state of the assigned Workflow. This is sent to the assigned Technician. |
| PrefixSMS                  |  |

---

To customize an SMS message template:

1. Select Setup > Email > Templates
2. Move to the SMS Templates filter

3. Select the Message Name hyperlink

The HTML editor appears.

---

| Icon | Description   |
|------|---|
|      | The drop-down list options provides specific details to be included on the SMS message. |
|      | Restores the system default SMS message.  |

---

4. Modify the message as required

As part of the customization, the Administrator can use the existing parameters included in the Insert Parameter drop down list. Using these options ensures the customized message use the correct format for the details regarding this information.

5. Click Save.



## SMS Parameters

Parameters for new and updated Request templates:

| Parameter   | Source  |
|-------------|---|
| Process     | Shows if the request is a Service Request, Incident, Problem or Change. |
| New Status  | Shows the Workflow State assigned to the request.                       |
| Request Id  | Shows the system generated request identification number.               |
| Request URL | A direct link to the request.   |

Parameters for the Group templates:

| Parameter  | Source   |
|------------|--|
| Group #    | Shows the Group ID number.   |
| Group URL  | A direct link to the request Group.  |
| Group Type | Identifies the Group as Service Request, Incident, Problem or Change requests. |

Parameters for the Invoice template:

| Parameter   | Source                        |
|-------------|-------------------------------|
| Invoice #   | Shows the Invoice number.     |
| Invoice URL | A direct link to the invoice. |

Parameters for the Item Status Change templates:

| Parameter   | Source  |
|-------------|---|
| Item Number | Shows the Item Number as recorded in the Item Information tab.        |
| Status      | Shows the Status of the Item as recorded in the Item Information tab. |

Parameter for the New Attachment template:

| Parameter | Source   |
|-----------|--|
| File Name | Allows the file name of the newly received attachment to be included in the email to the User. |

Parameters for the Planned Outage templates:

| Parameter         | Source   |
|-------------------|--|
| Outage End Date   | Drawn from the End Date field in the Configuration>Planned Outages screen.                   |
| Outage Items      | Shows the Items associated with the Planned Outage in the Configuration>Planned Outages tab. |
| Outage Start Date | Drawn from the Start Date field in the Configuration>Planned Outages screen.                 |

Parameters for the Escalation templates:

| Parameter           | Source   |
|---------------------|--|
| Current Technician  | Shows the name of the newly assigned Technician.   |
| Previous Technician | Shows the name of the Technician who was previously assigned the request.                  |
| Process             | Shows the ITIL Process of the request, i.e., Change, Incident, Problem or Service Request. |
| Request ID          | Shows the Request identification number.   |

### A.2.3 Email Signatures

Email Signatures that are applied at the base of all emails sent by the system are customized within the Full Email Templates filter of the Setup>Email>Templates tab. These can also be customized on a per Team basis using the Localization functionality.

To set the system default Signature:

1. Select Setup>Email
2. Go to the Templates Tab
  - The Full Email Templates filter view is displayed
3. Click to the final page of the Email Templates
4. Select the Signatures link

**Email**

Server Setup Templates SMS Log

Full Email Templates

| Name                  | Content   |
|-----------------------|---|
| Signature             | <p>-----</p> <p>Novell Service Desk<br/> <a href="http://www.novell.com">http://www.novell.com</a></p> <p><i>Click the Signature link to open in Edit mode.<br/> Enter the default content and click Save.</i></p>  |
| SlaBreached           | {{Phase}} Time Exceeded {{Time Limit}} {{Hr/Min}}.  |
| SlaBreachedSubject    | Contract Breached {{Name}}  |
| SlaTimeElapsed        | {{Time Elapsed}}% of the time to complete the {{Phase}} for this {{Process}} has elapsed.   |
| SlaTimeElapsedSubject | Contract ("{{Name}}") - {{Phase}} time warning {{Time Elapsed}}% elapsed  |
| SurveyCompleted       | Thank-you for completing our survey on {{Name}}   |
| SurveyPrefix          | You have been selected to take part in a user feedback survey for our Service Desk.   |
| SurveyReminderPrefix  | <p>Please access the Service Desk to complete the survey described below.</p> <p>In an effort to continually improve the Service Desk customer experience, we would value your feedback regarding a recent Service Desk interaction.</p> <p>Please take a moment to complete the user feedback survey described below, that was emailed to you recently. Your time and effort will be most appreciated.</p> <p>To provide feedback, access the survey through the following link.</p> |

51 - 58 of 58 Results

5. Edit the content
6. Click Save.

## Team Signatures

After Teams have been created by the Supervisor in the User>Teams tab, an Administrator can customize the content of the Signature for the Team within the Setup>Localization>Content tab. This function allows individual signatures to be customized for each Team and in the relevant language for Customers.

To amend the Signature details on a per Team basis:

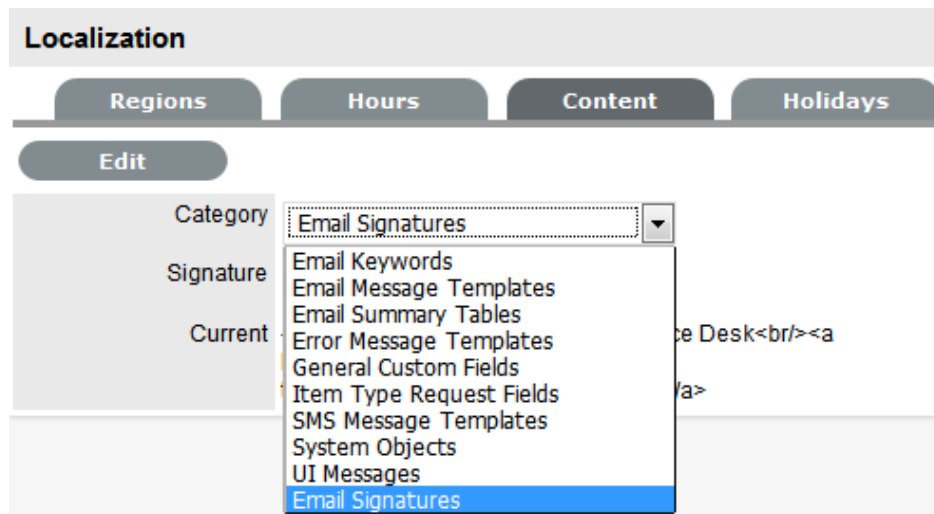
1. Select Setup>Localization
2. Click the Content tab
3. Select the Link of the language file to be customized

To create a signature file for each Team in English, select the English Locale link.

4. In the Category list select Email Signatures

A Signature list is displayed that includes the default Signature and the list of Team names configured in the system.

5. Select the Team Signature within the drop down list



6. Click Edit
7. Amend the signature details
8. Click Save.

### A.3 Technician Assignment

The logic behind Technician Assignment within the system is more than the application basing the allocation on the Technician location, load or skill set, as more extensive parameters are considered when routing requests to Technicians. By understanding the variables within the assignment process, Users can configure the system to better reflect the workflow of its service support Team environment.

When a request is logged with the service desk, the Team is selected based on the SLA and Workflow State of the request.

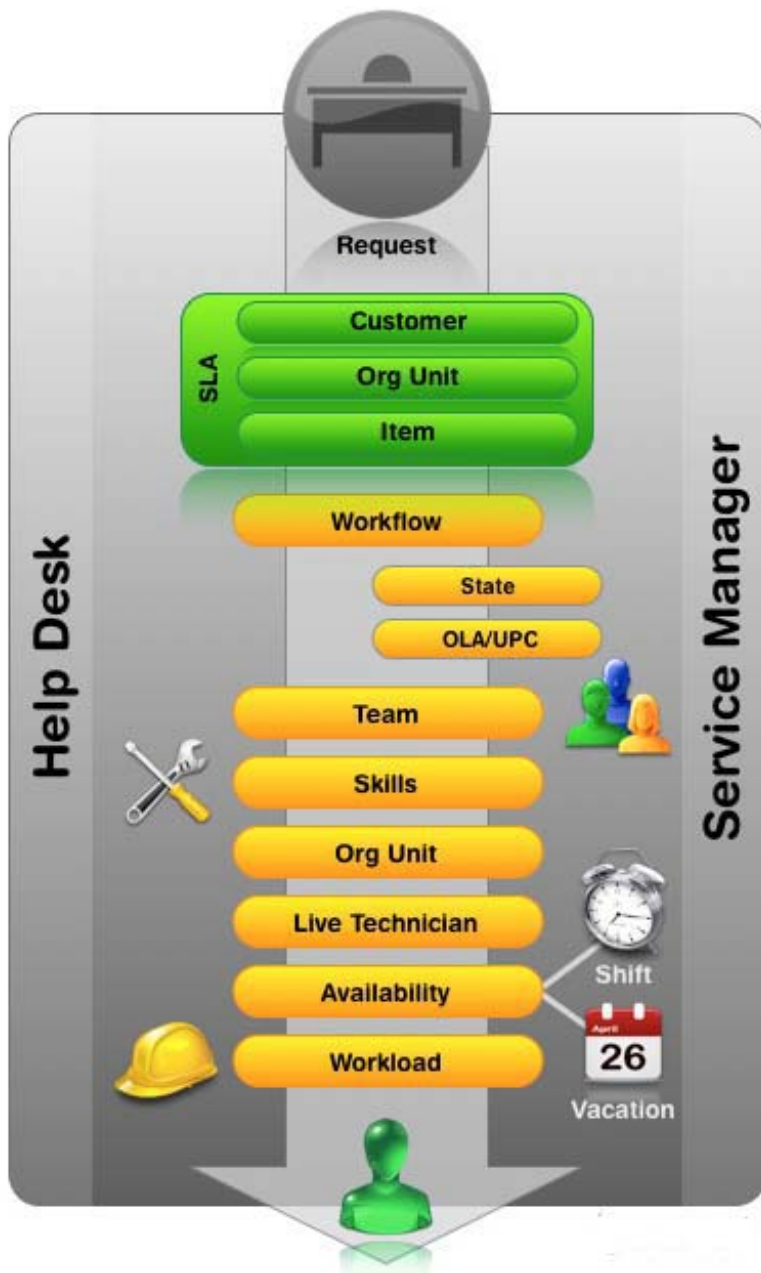


Figure 1: Request assignment logic

After the Team has been assigned to the request, the application:

1. Checks if the Team has escalation layers, and validates the capability of Technicians in Layer or Group associated with the request
2. To make an assignment within the layer or group, the system checks if Technicians are assigned areas of specialty - Skills or Classifications. If so, the system matches the Classification of the request 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 request'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.

---

**NOTE:** It should be noted that if the Technician Define Work Hours option has been enabled in the Admin>Setup>Privileges>User, the hours of work **MUST** be defined within the Super>User>Users>Schedule tab, otherwise the system will ignore the Technician Assignment logic and automatically allocate new requests to the Team Lead.

---

Please note that these are not only the forces that govern request assignment. Other factors that determine the routing of requests include the Team assigned to Workflow State, the Technician assignment privilege and if request Queues are enabled.

### **A.3.1 Service Manager and Workflow States**

Within Service Manager the pool of Technicians that can be assigned to a request is increased by the OLA or Underpinning Contract assigned to the Workflow State of the request.

Service Manager allows Workflow States to be governed by internal or external contracts, known as OLAs or Underpinning Contracts, respectively. OLAs can be assigned to different support Teams, which means if the Team changes as a result of the Workflow State change, the request may be routed to a whole new pool of Technicians.

If the Workflow is supported by an Underpinning Contract, the request is assigned internally to the responsibility of the Service Level Manager.

### **A.3.2 Self Assign Option**

The Self Assign functionality allows the application to override the business logic of request assignment. This feature enables the automatic allocation of requests to the Technician who creates the request. A Supervisor User can activate Self Assign for requests on a per Team basis, within the Team Information screen.

### **A.3.3 Request Queues**

That about covers the automated routing of requests, but support Teams who prefer to create a queue or holding bay for newly created requests, are also catered for within the system.

Queues are activated on a per Team basis. This means, where one support Team may use the automated routing process, another can create a holding bay. The holding bay allows Technicians to choose their jobs from the Queue, as opposed to having requests automatically assigned by the system.

The Administrator User can activate the Queues feature in the application Setup>Privileges>Requests tab. The Supervisor User then enables the option within the Team Information screen, as required. New requests assigned to a Team with this preference enabled, are assigned to the System User. To access requests held in the Queue, Technicians use the Request Queue Filter within the Home Tab.

The request can then be re-assigned to a specific Technician within the Summary Tab of the request. See: [Queues](#).

## **A.4 Public Holidays, SLAs and Technician Assignment**

The Public Holidays functionality allows the system to be configured to automatically account for non-service days of the Service Desk, irrespective of its location. This forms part of the Technician assignment facility, as the system logic considers public holidays in relation to service level requirements and Technician availability. For example, where the Service Desk has a global customer base and office locations in multiple countries, the observed public holidays for the different countries and states can be configured by the Administrator. Then when a request is logged by a customer in one country where the service desk has a public holiday, it assigns the new request to a Technician in a region that does not have the holiday.

The system also adjusts the SLA timers in relation to breaches and escalations, where relevant. This means that once a public holiday starts (i.e., at midnight in the location where the holiday falls), the due dates of all requests are moved forward for the period of time that the public holiday is in effect.

### **A.4.1 Accessing Public Holidays functionality**

The Public Holidays functionality is enabled and configured by the Administrator User. To enable Public Holidays, enable the Observe Public Holidays in the Setup>Privileges>User tab. This provides access to a fully configurable list of public holidays within the Setup>Localization>Holidays tab.

### **A.4.2 List View and Bulk Operations**

The list view displays all the holidays for the selected region. Select multiple holidays to perform bulk operations such as Select multiple holidays to Activate or Deactivate.

### **A.4.3 Creating New Holidays**

By default the system includes the national public holidays for a number of countries that can be accessed by changing the filter view of the Holidays list. This list can be expanded to include any country, including relevant holidays for its different states or provinces.

To set new Holidays for any Country and State or Province, as an Administrator:

1. Select Setup>Localization>Holidays
2. Click New

**Localization**

Regions Hours Content **Holidays** Titles

**Details**

Name

Active

**Location**

Country Australia

State

**Schedule**

Interval Recurring

Date

Day of Month

Open Hours <closed> to <closed>

Cancel Save

3. Complete the field details.

4. If Custom Schedule is defined as the Interval, select **+**

The Date field for rescheduling the Holiday is displayed. This allows the Administrator to adjust the day the public holiday is observed, and caters for instances where the public holiday falls on the weekend but is observed on either the Monday or Friday. The Administrator must account for this adjustment on an annual basis for all relevant holidays.

**Localization**

Regions Hours Content **Holidays** Titles

**Details**

Name Ballarat Cup Day

Date

Cancel Save

5. Enter the Date and Save

The date is saved as a Rescheduled Entry.

6. Click Save.

---

**NOTE:** The Administrator must adjust the dates for rescheduled holidays on an annual basis. Tip: Use the scheduled Quick Call functionality within the Supervisor>Home tab, to annually create the task automatically.

---



## A.4.4 Delete a Rescheduled Entry

To change a rescheduled entry for a Holiday, the existing entry must be deleted. It should be noted that historical entries cannot be deleted as they may be required for historical reference purposes.

To delete a rescheduled entry for a Holiday:

1. Select Setup>Localization>Holidays
2. Click on the hyperlink of the relevant Holiday
3. Click on the relevant Rescheduled Entry hyperlink
4. Select the Delete button

A warning window will appear

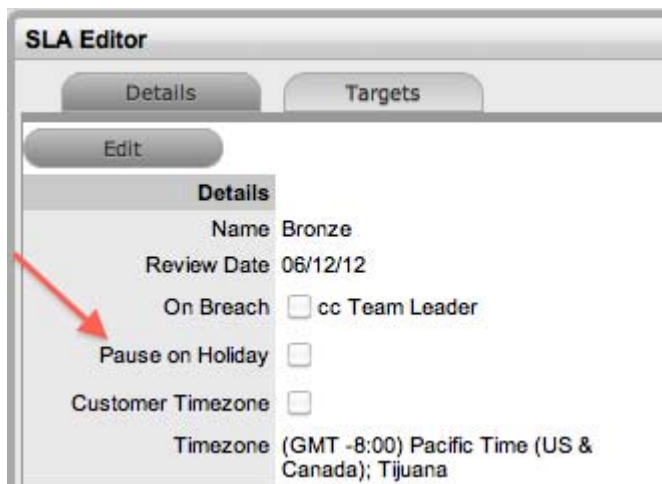
5. Click OK within the warning window

The Rescheduled Entry window will close.

## A.4.5 Public Holidays System Logic

The Public Holiday logic is applied to SLAs on a per SLA basis. This allows for the system to include SLAs that observe the public holidays and others that do not.

For Public Holidays to be considered in relation to an SLA, the Pause on Holiday option needs to be enabled for the specific SLA. This option is only visible within the SLA Editor screen after the Administrator has activated the Public Holidays option within the Setup>Privileges>User tab.



Things to note when working with the Pause on Holiday option:

- ◆ When a public holiday occurs for a Technician, their assigned requests only have their SLA timers adjusted if the SLA option Pause on Holiday check-box is ticked. Any requests that have an SLA that do not have this option set, continue as normal.
- ◆ The amount of time a request is paused relies on the SLA open hours, which may be defined as 24 hours or specific hours of operation. For example, where the SLA open hours are defined as 9:00am to 5:00pm weekdays, the base time of 8 hours is applied to pause the SLA.

- ♦ If the Service Desk is opened for part of the day that is declared as a public holiday, the Open Hours set for the public holiday will be deducted from the SLA open hours. For example, if the public holiday was observed from 12:00pm, where the SLA open hours are defined from 9:00am to 5:00pm, the base time would be reduced by 3 hours and the SLA paused for 5 hours.
- ♦ If the Due Date falls on a Public Holiday and the hours applied to pause the SLA do not push the Due Date to normal operating hours then:
  1. For 24x7 support - the system pushes the due date to midnight, or the beginning of the next service day.
  2. For configured support hours or "normal support" - the due date is pushed to the start time of the next "open" day. For example, if a public holiday falls on a Friday for a support operation that works 9:00am to 5:00pm Monday to Friday, and an Incident's due date is 2:00pm on the Friday, then the due date is pushed to 9:00am the following Monday.
- ♦ If the request is in a Workflow State where an OLA applies, the OLA is adjusted by the same amount that the SLA is paused.
- ♦ When the Pause on Holiday option is enabled for a new request that is logged with the system during Public Holiday hours, if the system cannot find an available Technician for request assignment, it assigns the request to a Technician in the first layer of escalation, based on the Technician Assignment logic. This scenario generally applies to organizations where the service desk Team is based in one location. (If all Technicians have their On Vacation status marked to Yes, the request is assigned to the Team Lead.)
- ♦ If a Technician is not available to work on the request, and the new request is assigned an SLA with the Pause on Holiday flag enabled, then the due date is calculated based on the time the request is created plus the number of hours left of the public holiday. For example, where the SLA open hours are paused for 24 hours (i.e., a full day), for a request created at 8:00pm the due date is calculated using the target of the SLA Priority plus 4 hours (as there are 4 hours remaining of the public holiday).

## A.5 Web Services

The Web Services Interface enables third party applications to interact directly with the service management application in a secure and controlled fashion. The interface is based on the SOAP standard for Web Services. For more information about SOAP Web Services, please see: <http://www.w3.org/standards/webofservices/>.

The system's Web Services Interface is intended for developers to use to extend the application's accessibility and requires a basic familiarity with Java. For detailed information and instructions, please contact Micro Focus Customer Center to obtain a copy of the *WebServices API* document.

## A.6 Internationalization

*Internationalization* is the process of designing an application so that it can be adapted to various languages and regions without engineering changes. Sometimes the term internationalization is abbreviated as i18n, because there are 18 letters between the first "i" and the last "n."

The system is an internationalized program that has the following characteristics:

- ♦ The addition of localized data that allows the same executable to run worldwide

- ◆ Textual elements, such as status messages and the GUI component labels, are not hard-coded in the program. Instead they are stored outside the source code and retrieved dynamically
- ◆ Support for new languages does not require re-compilation
- ◆ Culturally-dependent data, such as dates and currencies, appear in formats that conform to the end user's region and language
- ◆ The application can be localized quickly.

*Localization* is the process of adapting software for a specific region or language by adding locale-specific components and translating text. The term localization is often abbreviated as l10n, because there are 10 letters between the "l" and the "n."

## A.6.1 Internationalization

The support system internationalized framework is very intuitive and flexible, which allows Users to localize it for a particular language and character encoding schema.

The primary task of Users performing localization of the application is translating the user interface elements in the external text file - LiveTime.properties.

The following steps are a guide through the localization process. This example assumes French localization of the application and uses the ISO-8859-1 character set.

### 1. *Ensure the Desktop's Operating System has the appropriate character set installed*

The localization file and rendering requires the character set to be available for data entry and data presentation.

### 2. *Ensure the RDBMS is created using the appropriate character set*

This is required so that French data entry can be successfully saved and retrieved from the database.

### 3. *Specify the correct character set encoding for the system*

Edit the 'Properties' file (/CONTAINER\_APPS\_PATH>/LiveTime/WEB-INF/LiveTime.woa/Contents/Resources folder) and specify the character set to use for presentation to the end user. This character set is sent to the end users to control presentation in both the user interface and outbound email.

### 4. *Edit the UI strings in the external properties file*

The 'LiveTime.properties' file (/CONTAINER\_APPS\_PATH>/LiveTime/WEB-INF/LiveTime.woa/Contents/Resources folder) stores the externalized user interface content. This file is stored in plain text, the default (English) is encoded using the ISO-8859-1 character set. Alternative versions of this file can be created in any text editor that allows the file to be saved in the necessary character set.

The first step in creating a local version of this file is to save a copy of it, representing the appropriate language. For this example of the French translation, there is no need to worry about the file encoding, simply save a copy of the file called 'livetime\_fr.properties'

## A.6.2 Simple Messages

The copy of this file consists of a collection of name-value pairs, each are broken up into clusters representing user interface components.

For example:

```
ClassName.greetings=Hello
```

```
ClassName.farewell=Goodbye
```

```
ClassName.inquiry=How are you?
```

The 'name' or 'key' section (ClassName.greetings) of these strings is of little relevance to the end user except to note that if they are changed, the system is not able to look them up.

The 'value' component of these pairs (Hello) represents the corresponding user interface value. The (French) translator can safely edit these values and they will appear within the system.

```
ClassName.greetings=Bonjour.
```

```
ClassName.farewell=Au revoir.
```

```
ClassName.inquiry=Comment allez-vous?
```

## A.6.3 Compound Messages

Compound messages contain variable data i.e., data that the support system substitutes into a message at run time. For example, given the message 'Hello Sunshine', the string Sunshine may vary. This message is difficult to translate because the position of the string in the sentence is not the same in all languages, or alternatively the value may need to be generated by the application based on some business logic.

Where this substitution is necessary, the localized strings have a set of braces containing an id number (a substitution variable). These blocks are replaced at run time by the system and are identified by its presence. The localized version of a given string must contain the same number of substitution variables.

For example:

```
ClassName.helloSunshine=hello {0}
```

This will render as "hello sunshine", however we could modify this message to read "sunshine, hello" by doing this:

```
ClassName.helloSunshine={0}, hello
```

1. Edit the Locale Definitions file

The 'LiveTimeLocales.xml' file (/Resource folder) defines the language code and charset used in order to process the strings defined in the external properties file.

Typically, this is the charset used when the external properties file is saved.

By default the following language locale is selected:

```
<LOCALE language="en" country="" charset="ISO-8859-1"/>
```

To enable the French external properties file to behave correctly, comment the above line and uncomment the following line:

```
<LOCALE language="fr" country="" charset="ISO-8859-1"/>
```

For convenience, many values are already supplied in this file so it is just a matter of uncommenting the necessary entry.

If an entry for the locale language is non-existent, then define it in the file by supplying the language code, country code, and charset, as illustrated in the above examples.

#### 1. File Names.

The names of the localized files do follow a standard. In the French example, `livetime_fr.properties` was the resulting file name. The 'fr' component of this name comes from iso 639-1. A full list of these codes is available here:

<http://www.ics.uci.edu/pub/ietf/http/related/iso639.txt>

*Example of Login Page Translated:*



Bienvenue à notre système en ligne de soutien. Veuillez entrer votre username et mot de passe à l'ouverture

Nom d'utilisateur

Mot de passe

Ne pas oublier le code d'accès

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