Innovator Service Desk

An ITIL Based Open Source Solution

Aras Innovator 8.2

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1 Overview

The Innovator Service Desk Solution (ISD) is based on the OGC's concept of IT Service Management which is outlined in Infrastructure Technology Infrastructure Library (ITIL) Specification (v2). In addition to the guidelines outlined by the OGC, the ISD Solution also includes capabilities outlined by the members of the IPT.

The primary focus of the Service Desk in an ITIL environment is to restore service as quickly as possible. The ISD Solution serves as the single point of contact between users and IT Service Management. The ISD Solution includes functionality in the following key areas:

- Incident Management
- Problem Management
- Change Management
- Service Level Management
- Email Integration

1.1 Incident Management

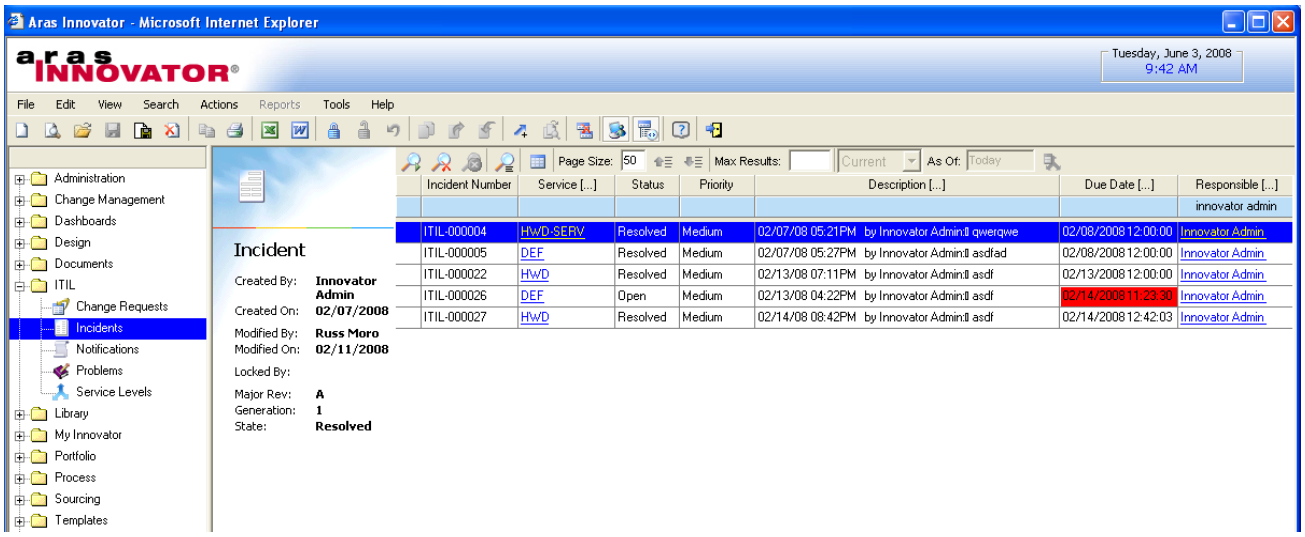
The goal of Incident Management is to restore normal service as quickly as possible, while minimizing any adverse impact on business operations.

The Incident Management capabilities in the solution allow the IT User to:

- Resolve service disruptions faster, thus reducing their impact on the business
- Achieve cost efficiencies and improve resource management
- Increase customer satisfaction through reduced resolution times and a more systematic approach to Incident prioritization
- Ensure the focus of the Service Desk is on service management and customer satisfaction.

The 'ITIL Incident' Itemtype in the ISD Solution serves as a vehicle for initiating, managing, and documenting Incidents. The 'ITIL Incident' Itemtype is available under the ITIL TOC folder. When 'Incidents' is selected in the TOC, the Innovator Main Grid Window displays a list of Incidents and their key properties (e.g. 'Status', 'Priority', 'Responsible', etc.).

Incidents (TOC & Main Grid View)



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When creating a new Incident, the user is responsible for entering basic information about the Incident (light shaded fields in Incident form) which includes:

- **Service:** Type of service for the Incident that must be selected from a pre-defined service structure ('ITIL Service' Library). This library can be customized to meet the organization's needs.
- **Urgency:** The Urgency of the Incident. Select from a list (Not Important, Difficult to Work, Work Stoppage). This field is used in the 'Priority' calculation ('value' of selected list item is used). This list can be customized to meet the organization's needs
- **Impact:** The Impact of the Incident. Select from a list (Individual, Location Wide, Company Wide). This field is used in the 'Priority' calculation ('value' of selected list item is used). This list can be customized to meet the organization's needs.
- **New Comment:** The User may add a new comment to the 'Description' field on the Incident form by entering a value in this field and clicking 'Submit'.

Additionally, there are several fields that are auto-populated by the system (after the Incident has been saved) cannot be altered by the user (grey shaded fields in Incident form):

- **Incident #:** This is a unique, sequential number and can be changed my modifying the 'ITIL Sequence' (Administration->Sequences)
- **Initiated On:** Date/Time the Incident was created
- **Description:** Comments (added by via the 'New Comment' field) are appended to the description field along with the user's name and timestamp. The User may single click on the 'Description' field and the system will launch a read-only window with the contents of the 'Description' field and scrolling enabled.
- **Priority:** Calculated directly from the 'Urgency' and 'Impact' values (Urgency + Impact = Priority)
- **Status:** Current Lifecycle state of the Incident (Open, Idle, or Resolved)
- **Due Date:** Date/Time the Incident is due. The value set in this field = the service level 'Response Time' + Incident 'Initiated On' field values. The 'Coverage Start Time' and 'Coverage End Time' for the service level are also accounted for in the calculation of the 'Due Date'. Additionally, this field is color coded based on the remaining time to close the Incident:
    - **White:** Lifecycle State of Incident is 'Resolved'
    - **Green**: Lifecycle State of Incident is NOT 'Resolved', 'Due Date' > Current Date/Time
    - **Yellow:** Lifecycle State of Incident is NOT 'Resolved', 'Initiated On' + 'Warning Time' (from service) >= Current Date/Time AND Current Date/Time < 'Due Date'
    - **Red:** Lifecycle State of Incident is NOT 'Resolved', 'Due Date' >= Current Date/Time
- **Closed On:** Date/Time the Incident was closed ('set resolved' action)
- **Time Spent (Min):** Calculated field representing the total amount of time the form has been opened for an Incident in the 'Open' lifecycle state. The calculated value is cumulative and is stored by the system each time the Incident Form is closed. When the form is re-opened, the value in the field is updated. Note: The system doesn't update the value of this field for Incidents that are in either the 'Idle' or 'Resolved' lifecycle states. The primary purpose of setting an Incident to 'Idle' (using 'Set Idle' action) is to prevent accumulating additional time when viewing the form.

The remaining fields are described, below:

- **Initiated By:** The name of the user who initiated the Incident. Manually populated for manually created Incidents. When an Incident is auto-created from an email

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using the ITIL Email Retriever application, the 'initiated by' is automatically set to the name of the user within Innovator based on a match on email address (email 'From' address -> Innovator User Account 'Email' property).

- **Service Level:** System chooses the Service level based on the shorted possible response time for all ITIL Service Levels to which the Incident 'Initiated By' user is assigned. The value of this field may be overridden by the User.
- **Responsible:** The name of the user or group responsible for resolving the Incident. System auto-populates this field based on the 'Responsible' property value defined in the 'ITIL Service' defined in the Incident. The value of this field may be overridden by the User.
- **Standard Solution:** The IT User may choose from a library of standardized ITIL Solutions. This field is optional. However, the 'Responsible' Identity must record a Standard Solution and/or a Solution Description before being able to set the Incident to 'Resolved' (Closed).
- **Solution Description:** If recording a Standard Solution is not appropriate, then the user may manually enter text describing the solution to Incident. This field is optional. However, the 'Responsible' Identity must record a Standard Solution and/or a Solution Description before being able to set the Incident to 'Resolved' (Closed).
- **Offline time (Min):** The IT User may enter additional time to that auto-calculated by the system ('Time Spent' field – see above) to account for the total time spent in the managing the Incident.

Incident Actions:

- **Claim:** Automatically sets the 'Responsible' property on the Incident to the current user's alias identity
- **Convert to Problem:** Automatically creates a new Problem and copies relevant property values from the Incident.
- **Convert to Change:** Automatically creates a new Change Request and copies relevant property values from the Incident.
- **Set Idle:** Promotes the Incident lifecycle to the 'Idle' state. Incidents that are in the 'Idle' state will not accumulate 'Time Spent' when the Incident Form is open.
- **Set Resolved:** Promotes the Incident lifecycle to the 'Resolved' state. An Incident may not be promoted to the 'Resolved' state unless either a Standard Solution and/or Solution Description have been recorded.

Incident Relationships:

- **Information:** Displays both Open and Closed ITIL Items (Incidents, Problems, & Change Requests) that are 'related' (have the same 'Service') to the current Incident. This provides the user a quick view of other Incidents, etc. that already exists in the system.
- **Activities:** Allows a set of Activities to be defined for the Incident (Name, Due Date, Description, Notes)
- **Notifications:** Allows notifications to be defined for the Incident. The identity populated in the 'Display For' property will determine to which users the notification will be routed. Notifications are sent via email (upon promotion of the Notification to 'Active') and are also displayed in the Web Extension UI ('Active' State only).
- **Attached Files:** Files such as screenshots, etc. may be attached to the Incident. When an Incident is created from an email using the ITIL Email Retriever application, files attached to the inbound email are automatically attached to the Incident.

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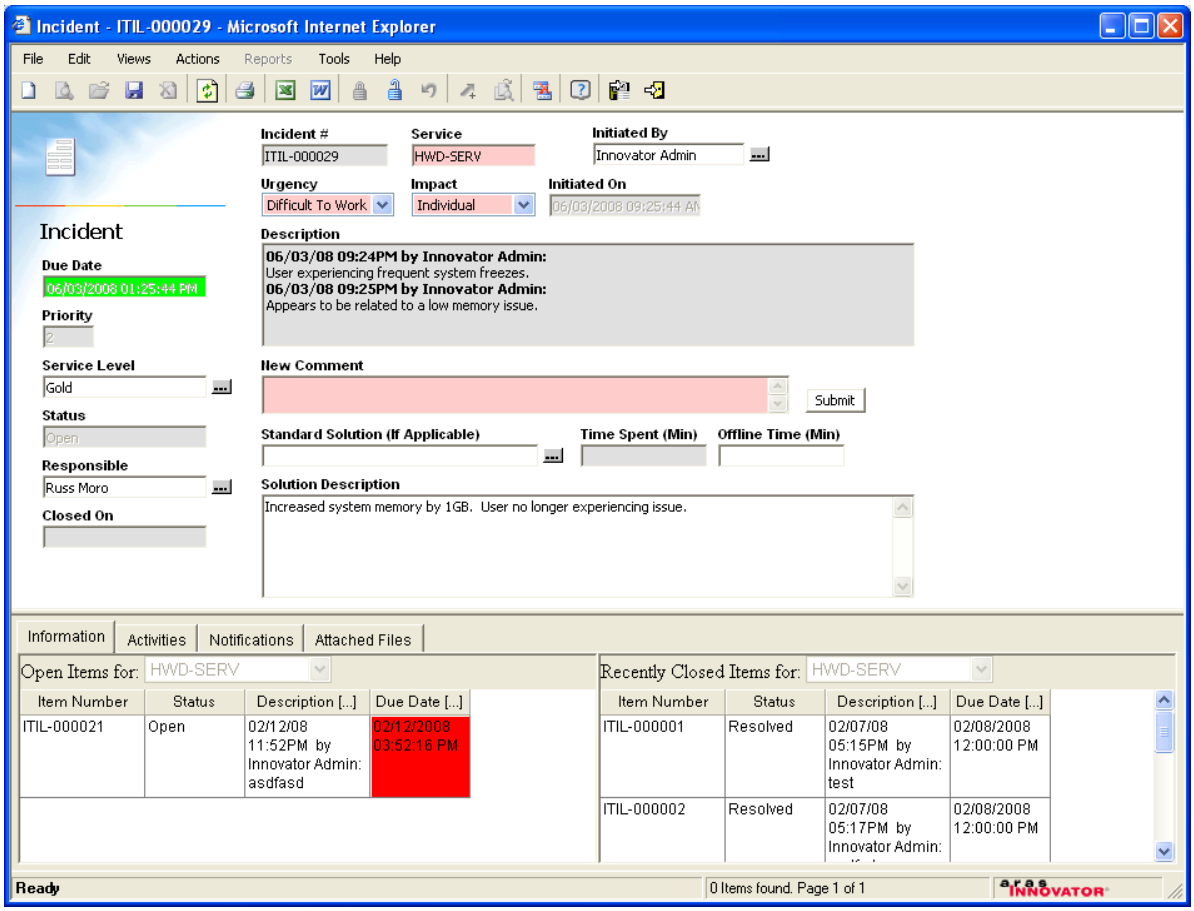
Incident Form



1.2 Problem Management

Problem Management aims to proactively prevent the occurrence of Incidents, Problems and errors within the IT infrastructure, in order to reduce the impact of these occurrences on the business.
Deeper issues within the IT infrastructure are investigated by Problem Management. Incident prevention is superior to managing Incidents once they have occurred. Problem Managements is the investigator within the organization, analyzing historic and current information to identify trends indicative of underlying faults. It also looks to Incident Management for the identification of Major Incidents that warrant Problem investigation.

The 'ITIL Problem' Itemtype in the ISD Solution serves as a vehicle for initiating, managing, and documenting Problems. The 'ITIL Problem' Itemtype is available under the ITIL TOC folder. When 'Problems' is selected in the TOC, the Innovator Main Grid Window displays a list of Problems and their key properties (e.g. 'Status', 'Priority', 'Responsible', etc.).

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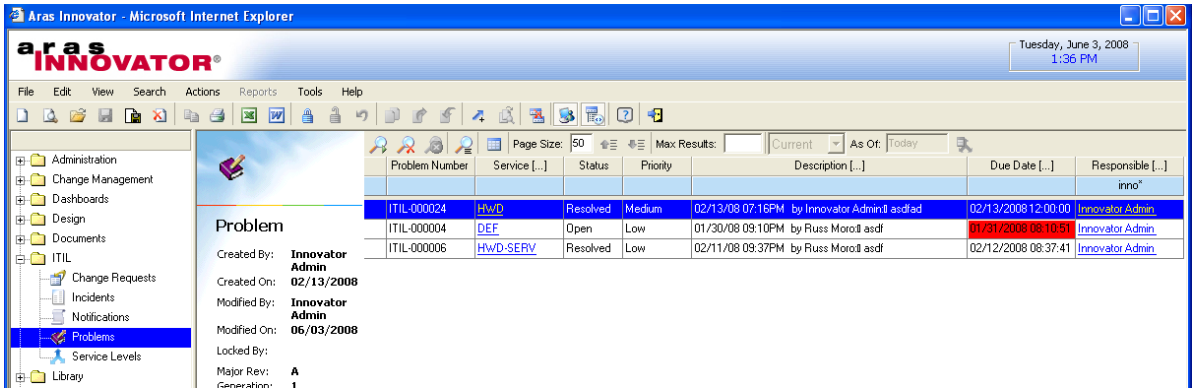
Problems (TOC & Main Grid View)



When creating a new Problem, the user is responsible for entering basic information about the Problem (light shaded fields in Problem form) which includes:

- **Service:** Type of service for the Problem that must be selected from a pre-defined service structure ('ITIL Service' Library). This library can be customized to meet the organization's needs.
- **Urgency:** The Urgency of the Problem. Select from a list (Not Important, Difficult to Work, Work Stoppage). This field is used in the 'Priority' calculation ('value' of selected list item is used). This list can be customized to meet the organization's needs
- **Impact:** The Impact of the Problem. Select from a list (Individual, Location Wide, Company Wide). This field is used in the 'Priority' calculation ('value' of selected list item is used). This list can be customized to meet the organization's needs.
- **New Comment:** The User may add a new comment to the 'Description' field on the Incident form by entering a value in this field and clicking 'Submit'.

Additionally, there are several fields that are auto-populated by the system (after the Problem has been saved) cannot be altered by the user (grey shaded fields in Problem form):

- **Problem #:** This is a unique, sequential number and can be changed my modifying the 'ITIL Sequence' (Administration->Sequences)
- **Initiated On:** Date/Time the Incident was created
- **Description:** Comments (added by via the 'New Comment' field) are appended to the description field along with the user's name and timestamp. The User may single click on the 'Description' field and the system will launch a read-only window with the contents of the 'Description' field and scrolling enabled.
- **Priority:** Calculated directly from the 'Urgency' and 'Impact' values (Urgency + Impact = Priority)
- **Status:** Current Lifecycle state of the Problem (Open, Idle, or Resolved)
- **Due Date:** Date/Time the Incident is due. The value set in this field = the service level 'Response Time' + Problem 'Initiated On' field values. The 'Coverage Start Time' and 'Coverage End Time' for the service level are also accounted for in the calculation of the 'Due Date'. Additionally, this field is color coded based on the remaining time to close the Incident:
  - **White:** Lifecycle State of Problem is 'Resolved'
  - **Green**: Lifecycle State of Problem is NOT 'Resolved', 'Due Date' > Current Date/Time
  - **Yellow:** Lifecycle State of Problem is NOT 'Resolved', 'Initiated On' + 'Warning Time' (from service) >= Current Date/Time AND Current Date/Time < 'Due Date'
  - **Red:** Lifecycle State of Problem is NOT 'Resolved', 'Due Date' >= Current Date/Time

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- **Closed On:** Date/Time the Problem was closed ('set resolved' action)
- **Time Spent (Min):** Calculated field representing the total amount of time the form has been opened for an Problem in the 'Open' lifecycle state. The calculated value is cumulative and is stored by the system each time the Problem Form is closed. When the form is re-opened, the value in the field is updated. Note: The system doesn't update the value of this field for Problems that are in either the 'Idle' or 'Resolved' lifecycle states. The primary purpose of setting a Problem to 'Idle' (using 'Set Idle' action) is to prevent accumulating additional time when viewing the form.

The remaining fields are described, below:

- **Initiated By:** The name of the user who initiated the Problem. Manually populated field.
- **Service Level:** System chooses the Service level based on the shorted possible response time for all ITIL Service Levels to which the Problem 'Initiated By' user is assigned. The value of this field may be overridden by the User.
- **Responsible:** The name of the user or group responsible for resolving the Problem. System auto-populates this field based on the 'Responsible' property value defined in the 'ITIL Service' defined in the Incident. The value of this field may be overridden by the User.
- **Standard Solution:** The IT User may choose from a library of standardized ITIL Solutions. This field is optional. However, the 'Responsible' Identity must record a Standard Solution and/or a Solution Description before being able to set the Problem to 'Resolved' (Closed).
- **Solution Description:** If recording a Standard Solution is not appropriate, then the user may manually enter text describing the solution to Incident. This field is optional. However, the 'Responsible' Identity must record a Standard Solution and/or a Solution Description before being able to set the Problem to 'Resolved' (Closed).
- **Offline time (Min):** The IT User may enter additional time to that auto-calculated by the system ('Time Spent' field – see above) to account for the total time spent in the managing the Problem.

Problem Actions:

- **Convert to Change:** Automatically creates a new Change Request and copies relevant property values from the Problem.
- **Set Idle:** Promotes the Problem lifecycle to the 'Idle' state. Problems that are in the 'Idle' state will not accumulate 'Time Spent' when the Problem Form is open.
- **Set Resolved:** Promotes the Problem lifecycle to the 'Resolved' state. A Problem may not be promoted to the 'Resolved' state unless either a Standard Solution and/or Solution Description have been recorded. Additionally, if a Problem has related Incidents that are currently in the Open State, the System will prompt the user if they would like those Incidents to be automatically promoted to 'Resolved' (closed) as well.

Problem Relationships:

- **Information:** Displays both Open and Closed ITIL Items (Incidents, Problems, & Change Requests) that are 'related' (have the same 'Service') to the current Problem. This provides the user a quick view of other Incidents, etc. that already exists in the system.
- **Incidents:** Allows one or more Incidents to be related to the Problem.
- **Notifications:** Allows notifications to be defined for the Problem. The identity populated in the 'Display For' property will determine to which users the notification will be routed. Notifications are sent via email (upon promotion of the Notification to 'Active') and are also displayed in the Web Extension UI ('Active' State only).

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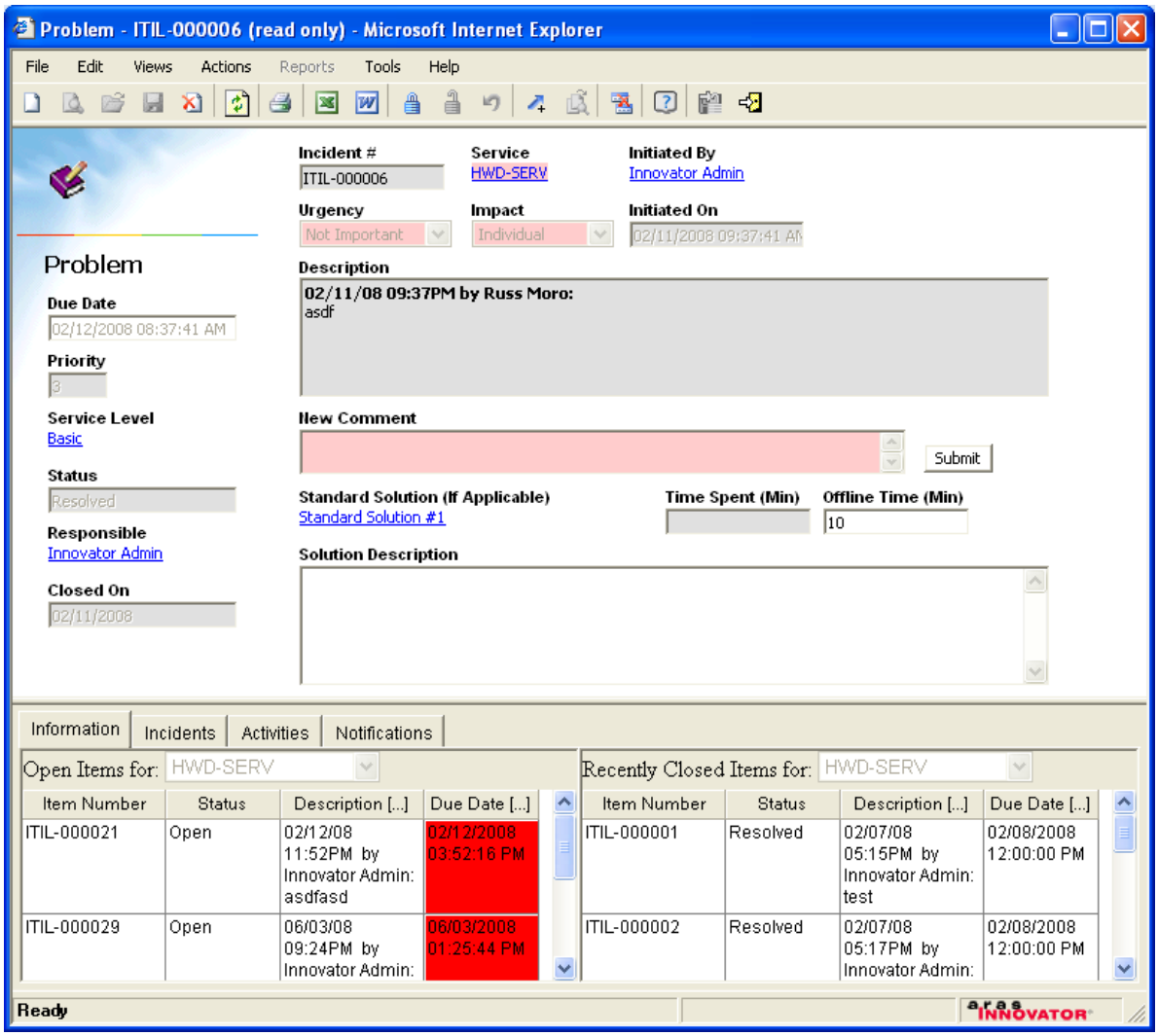
Problem Form



1.3 Change Management

To ensure the efficient supply of IT services, it is essential that changes are managed and controlled systematically, thus minimizing any undue disruption to IT services delivered to the customer.

Request for changes (RFCs) can arise in order to correct a fault in the IT infrastructure that has been identified through the Problem Management process. There are a number of other reasons why customers or other external parties would submit RFCs to the IT organization.

Change Management provides a way of managing and controlling the way changes are initiated, assessed, planned for, scheduled and implemented.

The Change Management portion of the ISD Solution includes:

- components of the IT infrastructure (e.g. hardware, software and documentation)
- IT services (SLAs)
- IT service organizations (e.g. organizational structure and procedures).

The 'ITIL Change' Itemtype in the ISD Solution serves as a vehicle for initiating, managing, and documenting Changes. The 'ITIL Change' Itemtype is available under the ITIL TOC folder ('Change Requests'). When 'Change Requests' is selected in the TOC, the Innovator

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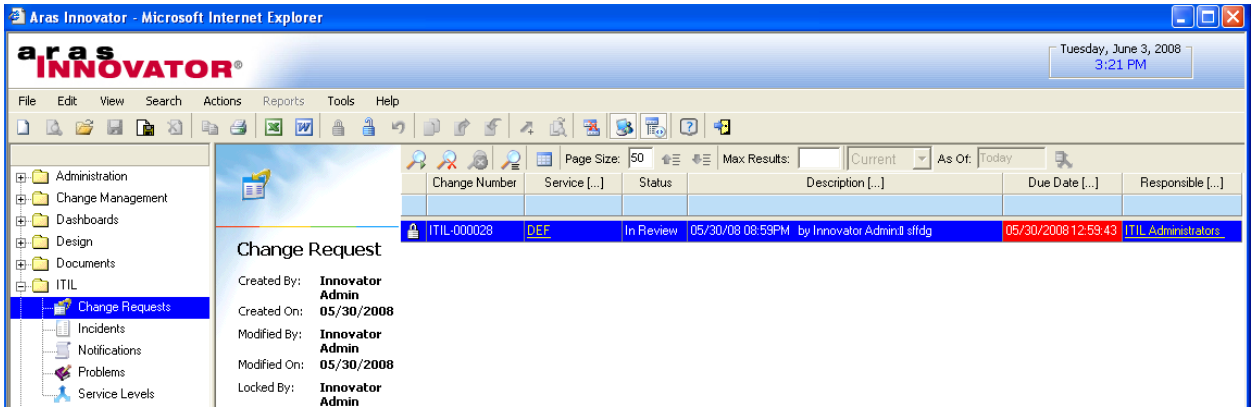
Main Grid Window displays a list of Change Requests and their key properties (e.g. 'Status', 'Priority', 'Responsible', etc.).

Change Requests (TOC & Main Grid View)



When creating a new Change Request, the user is responsible for entering basic information about the Problem (light shaded fields in Problem form) which includes:

- **Service:** Type of service for the Change Request that must be selected from a pre-defined service structure ('ITIL Service' Library). This library can be customized to meet the organization's needs.
- **Urgency:** The Urgency of the Change Request. Select from a list (Not Important, Difficult to Work, Work Stoppage). This field is used in the 'Priority' calculation ('value' of selected list item is used). This list can be customized to meet the organization's needs
- **Impact:** The Impact of the Change Request. Select from a list (Individual, Location Wide, Company Wide). This field is used in the 'Priority' calculation ('value' of selected list item is used). This list can be customized to meet the organization's needs.
- **New Comment:** The User may add a new comment to the 'Description' field on the Incident form by entering a value in this field and clicking 'Submit'.

Additionally, there are several fields that are auto-populated by the system (after the Change Request has been saved) cannot be altered by the user (grey shaded fields in Change Request form):

- **Change Number:** This is a unique, sequential number and can be changed my modifying the 'ITIL Sequence' (Administration->Sequences)
- **Initiated On:** Date/Time the Incident was created
- **Description:** Comments (added by via the 'New Comment' field) are appended to the description field along with the user's name and timestamp. The User may single click on the 'Description' field and the system will launch a read-only window with the contents of the 'Description' field and scrolling enabled.
- **Priority:** Calculated directly from the 'Urgency' and 'Impact' values (Urgency + Impact = Priority)
- **Status:** Current Lifecycle state of the Change Request (Open, Idle, or Resolved)
- **Due Date:** Date/Time the Incident is due. The value set in this field = the service level 'Response Time' + Change Request 'Initiated On' field values. The 'Coverage Start Time' and 'Coverage End Time' for the service level are also accounted for in the calculation of the 'Due Date'. Additionally, this field is color coded based on the remaining time to close the Change Request:
  - **White:** Lifecycle State of Change Request is 'Resolved'
  - **Green**: Lifecycle State of Change Request is NOT 'Resolved', 'Due Date' > Current Date/Time

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    - **Yellow:** Lifecycle State of Change Request is NOT 'Resolved', 'Initiated On' + 'Warning Time' (from service) >= Current Date/Time AND Current Date/Time < 'Due Date'
    - **Red:** Lifecycle State of Change Request is NOT 'Resolved', 'Due Date' >= Current Date/Time
- **Closed On:** Date/Time the Change Request was closed ('set resolved' action)
- **Time Spent (Min):** Calculated field representing the total amount of time the form has been opened for a Change Request in the 'Open' lifecycle state. The calculated value is cumulative and is stored by the system each time the Change Request Form is closed. When the form is re-opened, the value in the field is updated. Note: The system doesn't update the value of this field for Change Requests that are in either the 'Idle' or 'Resolved' lifecycle states. The primary purpose of setting a Change Request to 'Idle' (using 'Set Idle' action) is to prevent accumulating additional time when viewing the form.

The remaining fields are described, below:

- **Initiated By:** The name of the user who initiated the Change Request. Manually populated field.
- **Service Level:** System chooses the Service level based on the shorted possible response time for all ITIL Service Levels to which the Change Request 'Initiated By' user is assigned. The value of this field may be overridden by the User.
- **Responsible:** The name of the user or group responsible for resolving the Change Request. System auto-populates this field based on the 'Responsible' property value defined in the 'ITIL Service' defined in the Incident. The value of this field may be overridden by the User.
- **Cost Estimate:** Allows the user to specify a dollar amount for the Change Request Cost Estimate (must be a decimal value).
- **Estimated Impact:** Allows the User to specify the estimated impact of the Change Request
- **Offline time (Min):** The IT User may enter additional time to that auto-calculated by the system ('Time Spent' field – see above) to account for the total time spent in the managing the Change Request.

Change Request Relationships:

- **Information:** Displays both Open and Closed ITIL Items (Incidents, Problems, & Change Requests) that are 'related' (have the same 'Service') to the current Problem. This provides the user a quick view of other Incidents, etc. that already exists in the system.
- **Contributing Factors:** Allows one or more ITIL Items (Incidents, Problems, or Change Requests) that contributed to the creation of the Change Request to be specified.
- **Unintended Results:** Allows one or more ITIL Items (Incidents, Problems, or Change Requests) that had an unintended consequence to be specified.
- **Activities:** Allows a set of Activities to be defined for the Incident (Name, Due Date, Description, Notes)
- **Notifications:** Allows notifications to be defined for the Change Request. The identity populated in the 'Display For' property will determine to which users the notification will be routed. Notifications are sent via email (upon promotion of the Notification to 'Active') and are also displayed in the Web Extension UI ('Active' State only).

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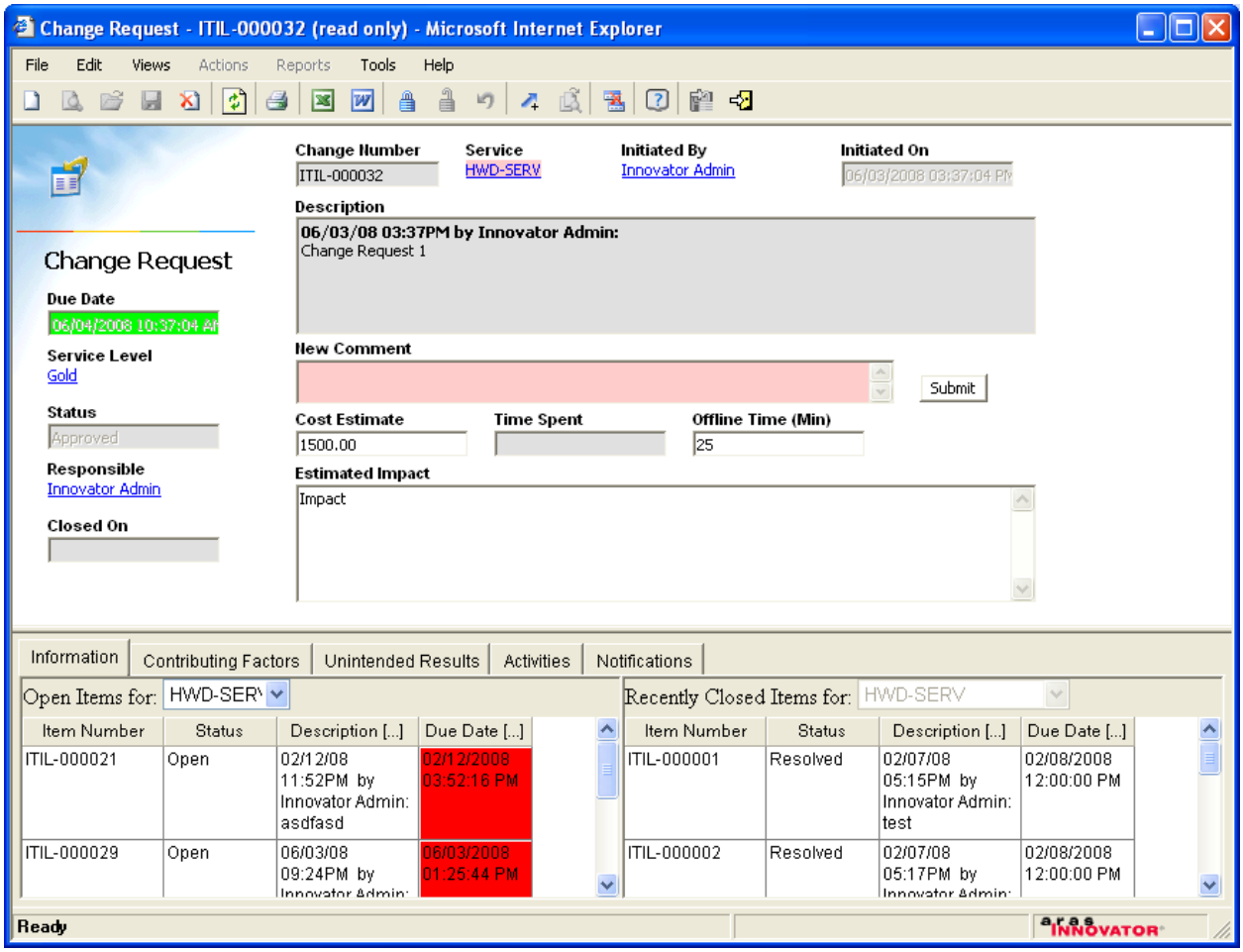
Change Request Form



1.4 Service Level Management

A "Service Level" defines the level of service provided to end-users within an ITIL environment. Each Service Level has a name and description, a response time, a warning time, an escalation time, and overall coverage times. The Response Time defines how long (in business hours) a service provider is allotted to finish work on the item. The Coverage Times define the start and end times (in military time) of coverage.

The 'ITIL Service Level' Itemtype in the ISD Solution is used to define the Service Level structure for the organization. The 'ITIL Service' Itemtype is available under the ITIL TOC folder. When 'Service Levels' is selected in the TOC, the Innovator Main Grid Window displays a list of Service Levels and their key properties (e.g. 'Name, 'Response Time', etc.).

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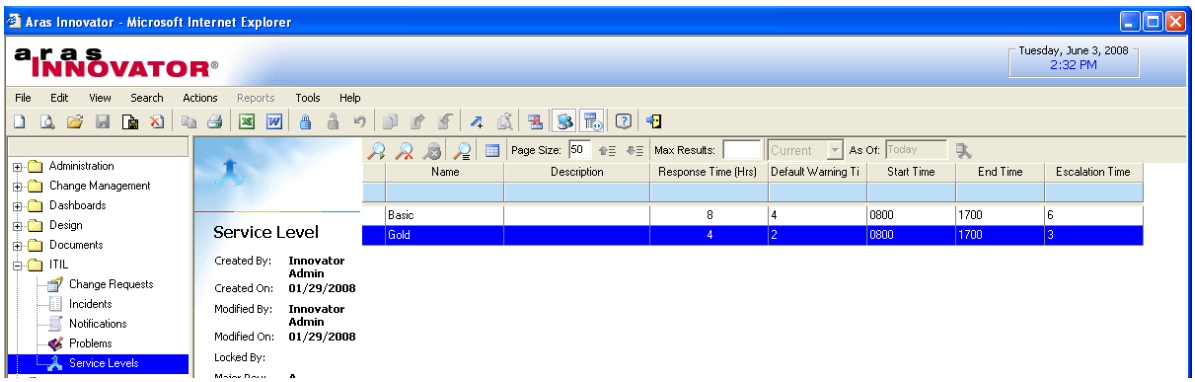
Service Level (TOC & Main Grid View)



The following is a description of the fields on the 'Service Level' form. Required Fields are denoted by a lightly shaded background:

- **Name:** Service Level Name
- **Description:** Service Level Description
- **Response Time:** Integer value representing the number of hours to be added to the ITIL Item (Incident, Problem, Change Request) 'Initiated On' date property to determine the 'Due Date'. Coverage Start Time and Coverage End Time are factored into the 'Due Date' calculation. See example, below.
- **Warning Time:** Integer value representing the number of hours to be added to the ITIL Item (Incident, Problem, Change Request) 'Initiated On' date property to determine the appropriate 'Warning Time'. When the 'Warning Time' has been exceeded, an email is automatically sent to the 'Responsible' identity for the ITIL Item. Coverage Start Time and Coverage End Time are factored into the calculation of the 'Warning Time'.
- **Escalation Time:** Integer value representing the number of hours to be added to the ITIL Item (Incident, Problem, Change Request) 'Initiated On' date property to determine the appropriate 'Escalation Time'. When the 'Escalation Time' has been exceeded, an email is automatically sent to the 'Responsible' identities Manager for the ITIL Item. Coverage Start Time and Coverage End Time are factored into the calculation of the 'Escalation Time'.
- **Coverage Start Time:** Denotes the start of ITIL Service coverage. Should be specified in Military time Format. See example, below.
- **Coverage End Time:** Denotes the end of ITIL Service coverage. Should be specified in Military time Format. See example, below.

Service Level Relationships:

- **Subscribers:** Used to specify which identities (individual users and/or groups) are members of the 'Service Level'. The same identity may be specified on more than one Service Level (system automatically chooses the service level with the shortest response time). Anyone that can be set as the initiator ('Initiated By') of an ITIL item (Incident, Problem, or Change Request) should be a member of an identity that is a subscriber on at least one service level. A typical configuration would have the 'World' or 'All Employees' identity assigned to one of the service levels as a default.
- **Service Exceptions:** Service Exceptions are used to exclude Services from the Service Level or to define custom response and warning times. A Service marked as Excluded prevents any Incident/Problem/Change Request from using that service (or its children) from being assigned to the Service Level. A Service Exception with a custom response time may increase or decrease the amount of time allotted to resolve the item

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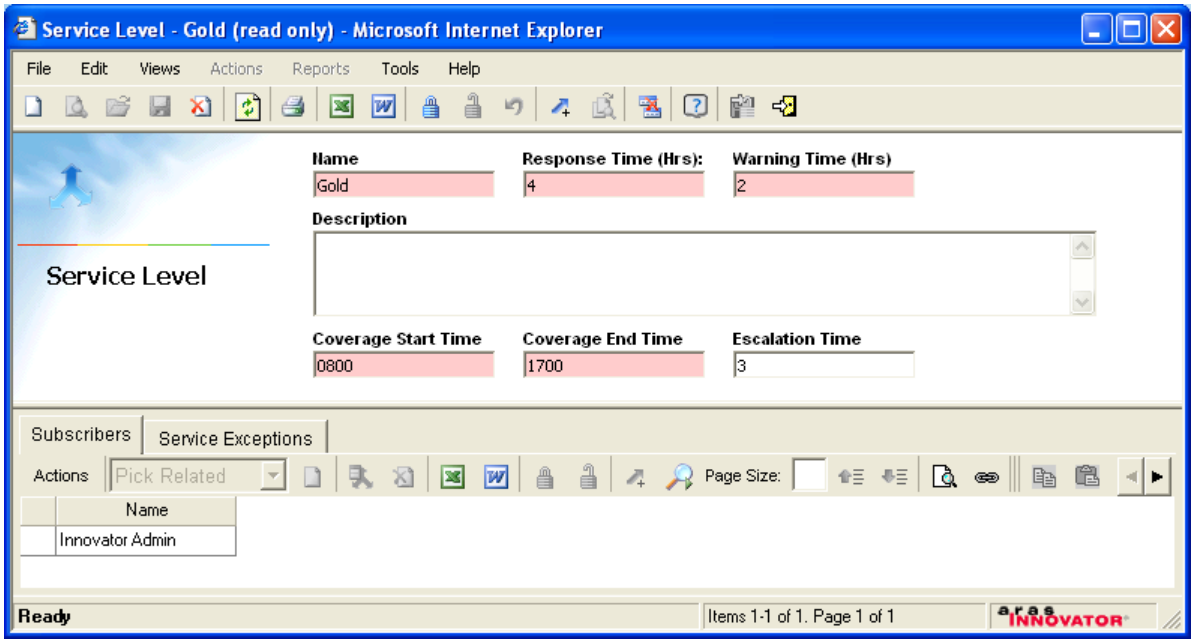
Service Level Form



Example of Coverage Start/End Time Influence on 'Due Date' Calculation:
Consider a Service Level with coverage beginning at 8:00 am (0800) and ending at 5:00 pm (1700), with a response time of 6 hours. An Incident subject to the Service Level reported at 8:30 am (0830) would need to be resolved by 2:30 pm (1430) the same day. If the Incident was reported at 1:00 pm (1300), it would need to be resolved by 10:00 am (1000) the following day. If the Incident was reported after-hours at 9:00 pm (2100), the response time would begin at the coverage start time of 8:00 am (0800) and resolution would be required by 2:00 pm (1400). The Service Level calculation must also take the user's business calendar into account, including weekends and holidays. For example, if an Incident was reported on a Friday at 3:00 pm (1500) and Saturday, Sunday and Monday were defined as non-working days, then the Incident would be due by noon (1200) on Tuesday.

1.5 Email Integration

The ISD Solution has built-in behaviors for sending emails (via SMTP) to specific users based on a set of pre-defined events:

(1) Email is sent to all members of the 'Responsible' Identity on an ITIL Incident, Problem, or Change Request when the ITIL Item is first created and/or whenever the 'Responsible' Identity property value is changed.
(2) Email is sent to all members of the 'Responsible' Identity when the warning time has been exceeded for an ITIL Incident, Problem, or Change Request.
(3) Email is sent to all managers (as configured in the User Itemtype) of the 'Responsible' Identity members when the escalation time has been exceeded for an ITIL Incident, Problem, or Change Request. In cases where a Manager is common to several members of the 'Responsible' Identity, then only a single email will be sent to the Manager
(4) When an ITIL Incident is set to 'resolved' (closed), a survey email is sent to the 'Initiated By' user.

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2 Installation and Configuration

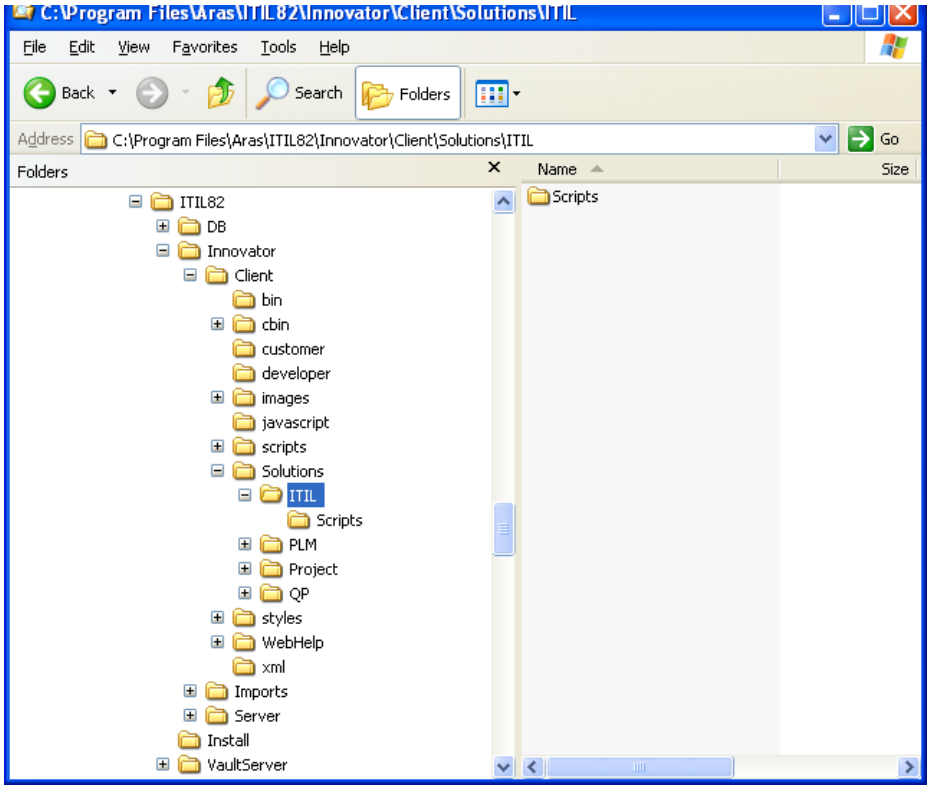
This section describes the steps required to install and configure the ISD Solution:

Note: The ISD Solution is currently only configured to work with Innovator v8.2.

2.1 Installation

2.1.1 Extract the contents of the ISD Solution .ZIP file to a local directory on the Innovator server.

2.1.2 Create a new folder named 'ITIL' on the Innovator Server (within the Innovator 8.2 File Tree) under the '\Innovator\Client\Solutions' folder. See screenshot, below:



2.1.3 Copy the 'scripts' folder from the extracted .zip files into the newly created 'ITIL' folder. The new structure should be '\Innovator\Client\Solutions\ITIL\scripts\'.

2.1.4 Import the 'ITIL' package contained within the .zip file into the target database using the **8.2** Innovator Import Tool. It is important that you use this version of the Import Tool. The Manifest File to be used for the import is 'ITIL.MF'. The Package contents are located in the 'Import' folder.

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2.1.5 [Optional] Install/Configure Innovator Service (Scheduler). The ISD solution uses the Innovator Service to call a method ('ITIL Time Warning Examinator') that inspects all ITIL Items (Incidents, Problems, & Change Requests) and sends out warning, escalation, and overdue emails when appropriate. Installation/Configuration instructions are distributed with the Innovator Service (see 'Aras Innovator 8.2 - Service Instructions.PDF'). An example of a job configured (InnovatorServiceConfig.xml) for this service is shown, below:

```
<job>
      <method>ITIL Time Warning Examinator</method>
      <months>*</months>
      <days>*</days>
      <hours>*</hours>
       <minutes>*</minutes>
</job>
```

2.1.6 Clear Client and Server Cache:

- Restart 'World Wide Web Publishing' service on the server.
- Close all IE browser windows on the client (check task manager to ensure no 'iexplore.exe' instances are running).
- Delete temporary IE files on the client machine (IE->Tools->Internet Options->Delete Files)

2.2 Configuration

This section describes areas of the ISD solution that need to be configured prior to using it.

2.2.1 **Service Tree Configuration:**

Each organization that provides ITIL based services uses the notion of a "Service Tree" to organize work. The Service Tree consists of a hierarchical structure of *Services*, which represent types of work to be performed. A simple example of such a hierarchy is shown below:

- Software
  - Desktop
    - Office
    - CAD
  - Server
- Hardware
  - Server
  - Desktop
- Network
  - Wiring
  - Hardware

In this example, there are three top-level services (*Software*, *Hardware* and *Network*), each of which has subservices. Subservices may be further broken down, resulting in a multi-level structure. In this example, the *Software-Desktop* service has *Office* and *CAD* subservices. There are no limitations on the number of services or the number of levels for an organization, but in practice there are typically not more than 100 services organized in no more than 4 levels. Each organization is expected to have its own unique structure, so no pre-loaded tree will be included.

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The Innovator Service Desk solution includes an ItemType named 'ITIL Service' to model the Service Tree. Each 'ITIL Service' has a name, description, abbreviation and a responsible Identity (owned_by_id). A RelationshipType named 'ITIL Service Structure' is included to model the multi-level structure. The keyed name of each 'ITIL Service' is calculated based on the abbreviations of the service and its parents. For example, in the above structure the keyed name of the CAD service should be "SW-Desktop-CAD".

The 'ITIL Service' Itemtype can be found in the Innovator TOC (under 'Library' folder -> 'ITIL Services')

2.2.2 Service Levels:

The set of Service Levels to be used within your organization needs to be defined before any ITIL Items may be created. See the 'Overview' section (above) for more information on Service Levels.

2.2.3 ITIL Standard Solutions Library:

The set of Standard Solutions to be used within your organization needs to be defined before users may select from the library. The library will likely grow over time and new items may be added at any point by an ITIL Administrator. The Solutions Library can be found in the Innovator TOC (under the 'Library' Folder -> 'ITIL Solutions')

2.2.4 Security Access/Permissions:

The following identities are provided with the solution and should be utilized to assign the system users the appropriate level of access within the ISD Solution:

- **ITIL Administrators:** Full Access/Permissions within the ISD Solution
- **ITIL Change Manager:** Manages ITIL Change Requests
- **ITIL Help Desk:** Manages ITIL Incidents
- **ITIL Problem Manager:** Manages ITIL Problems

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