**IBM Control Desk 7.6 Service Request Management Fundamentals**



TP362 (Classroom)

# Course description

This course introduces you to the fundamental concepts of managing a service desk using IBM® Control Desk. Through instructor-led discussion, demonstrations, and hands-on labs, you learn how to create and resolve service requests, incidents, and problems. You also learn to manage a service catalog, obtain user feedback through surveys, and generate reports.

After an introduction to IBM Service Management, and the ITIL® library, the course covers the main components of Service Request Management in IBM Control Desk.

The lab environment for this course uses the Windows Server 2012 R2, x64 platform.

For information about other related courses, visit the IBM Training website:

<http://www.ibm.com/training>

# General information

## Delivery method

Classroom or instructor-led online (ILO)

## Course level

ERC 1.0

## Product and version

IBM Control Desk 7.6

## Audience

This course is designed for anyone who implements or uses IBM Control Desk for Service Desk and Service Catalog functions, or anyone working with service requests, incidents, or problems.

## Learning objectives

When you complete this course, you can perform the following tasks:

* Describe the features and applications of the Service Desk and Service Catalog
* Explain the purpose and goals of request fulfillment, incident management, and problem manag processes
* Search for solutions within Control Desk
* Open, take ownership, review, update, close, and transfer service requests, incidents and proble
* Handle an issue from initial report to resolution using the Service Desk
* Follow an offering from shopping to fulfillment using the Service Catalog

## Prerequisites

Before taking this course, make sure that you have basic skills with operating systems, database administration, IPv4 networking, and service desk concepts. Additionally, it is beneficial to have taken course TP351, IBM Control Desk Fundamentals.

## Duration

3 days

## Skill level

Basic

## Classroom (ILT) setup requirements

**Table 1 Configuration for each instructor and student**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **System label** | **Machine type and processor** | **RAM** | **Hard disk** | **Display resolution** | **Operating system** |
| itracr | 2.5 GHz or faster Duo Core | 8 GB  minimum | 90 GB | 1024 x 768 | Windows 2012 Server 64 bit R2 |
| itracmail | 2.5 GHz or faster Duo Core | 2 GB  minimum | 8 Gb | 1024 x 768 | RHEL 7 |

**Table 2 Required network configurations**

**Network configuration Classroom requirement**

Specify **isolated networks** or a **single network** isolated networks Specify whether **Internet access** is required must not be provided Specify whether a **DHCP server** is required not necessary Specify whether **promiscuous mode** is required not necessary

Host name itracr12.tiv.ibm.com is required

IP address 192.168.1.210 is required

Host name itracmail.tiv.ibm.com is required

IP address 192.168.1.211 is required

## Table 3 Required software for class

**Software product**

**Version**

**Operating systems**

**System labels requiring**

**software product**

Windows 2012 Standard Edition

R2 64 bit itracr12.tiv.ibm.com

IBM DB2 Enterprise Edition

IBM WebSphere Application Server Network Deployment

IBM Control Desk Service Provider Edition

10.5 Windows 2012 Server R2 64 bit

8.5.5.3 Windows 2012 R2 64 bit

7.6.0 FP Windows 2012 R2 64

bit

itracr12.tiv.ibm.com itracr12.tiv.ibm.com

itracr12.tiv.ibm.com

IBM Java SDK 7 Windows 2012 R2 64 bit

Oracle Java 8 Windows 2012 R2 64 bit

itracr12.tiv.ibm.com itracr12.tiv.ibm.com

## Table 3 Required software for class (continued)

**Software product**

**Version**

**Operating systems**

**System labels requiring**

**software product**

Mozilla Thunderbird 45.2.0 Windows 2012 R2 64

bit

itracr12.tiv.ibm.com

Microsoft Silverlight Latest version

Windows 2012 R2 64 bit

itracr12.tiv.ibm.com

Microsoft Internet Explorer 11.0 Windows 2012 R2 64

bit

Mozilla Firefox 48.0.2 Windows 2012 R2 64 bit

itracr12.tiv.ibm.com itracr12.tiv.ibm.com

Adobe Reader Latest version

Windows 2012 R2 64 bit

itracr12.tiv.ibm.com

7zip Latest

version

Windows 2012 itracr12.tiv.ibm.com

RedHat Enterprise Linux 7 RHEL itracmail.tiv.ibm.com

Postfix From

distribution

From distribution itracmail.tiv.ibm.com

Cyrus mail client

# Notes

The following unit and exercise durations are estimates, and might not reflect every class experience.

This course is an update of TP360, 8P360: IBM SmartCloud Control Desk 7.5 Fundamentals ERC1.0

# Course agenda

The course contains the following units:

## Unit 1 Overview

Estimated time: 1 hour 15 minutes

|  |  |
| --- | --- |
| Overview | IBM Control Desk provides a wide range of functions. This unit provides an overview of the Service Desk and Service Management. |
| Learning objectives | * List at least three challenges that are faced by IT organizations * List at least three features of IBM Control Desk that address these challenges * Define IT Infrastructure Library® (ITIL®) and explain its relationship to IBM Control Desk * Give an overview of IBM Control Desk service request management |

## Unit 2 Service management

Estimated time: 1 hour 15 minutes

|  |  |
| --- | --- |
| Overview | This unit covers service-related definitions and an introduction to service desk activities. |
| Learning objectives | * Define a service * List the service request management processes that IBM Control Desk manages * Describe the ticket lifecycle |

## Unit 3 The Service Desk

Estimated time: 3 hours 15 minutes

|  |  |
| --- | --- |
| Overview | IBM Control Desk provides a wide range of functions. This unit provides an overview of the Service Desk and Service Management. |
| Learning objectives | * Navigate the classroom environment to log in, create service requests and search for solutions * Take ownership of a service request, change the SR’s status and resolve the ticket * Create entries in the solution application to build the knowledge base within IBM Control Desk * Transfer a service request to another resolver * Use the data in an existing service request to create an incident within Control Desk |

## Unit 4 Service requests, incidents, and problems

Estimated time: 1 hour 45 minutes

|  |  |
| --- | --- |
| Overview | This unit details service requests, incidents, and problems. Topics include the differences between the ticket types; the process flows involved in handling the tickets; and the roles involved. |
| Learning objectives | * Describe the differences between service requests, incidents, and problems. * Create a problem ticket from the incident ticket, bringing existing data forward. * Search external knowledge bases for solutions. * Use known errors to efficiently resolve incidents and problems. * Follow the flow of a complex issue from report to resolution. * Define and describe the roles that are associated with the Service Desk. |

## Unit 5 The Service Catalog

Estimated time: 1 hour 45 minutes

|  |  |
| --- | --- |
| Overview | Introduction, linked to preface. |
| Learning objectives | * Order a service offering * Check on the progress of a request * Fulfill a catalog request |

## Unit 6 Self-service

Estimated time: 2 hours

|  |  |
| --- | --- |
| Overview | This unit describes how requesters use the self-service tools. |
| Learning objectives | * Define *self-service* * Use self-service tools to search for solutions * Create a service request using self service * Use the View Service Requests application to view status and add logs * List the roles and responsibilities of those involved with self-service * Distinguish between the self-service user interface and the Service Portal |

## Unit 7 Workflows

Estimated time: 3 hours

|  |  |
| --- | --- |
| Overview | This unit defines workflows, shows how they are used in IBM Control Desk, and details scenarios in which they are used. |
| Learning objectives | * Define the term workflow and explain how workflows help the Service Desk perform its mission * Successfully resolve a service request using a workflow * Trace a simple workflow |

## Unit 8 Eighth unit placeholder

Estimated time: 2 hours

|  |  |
| --- | --- |
| Overview | This unit covers service level agreements (SLAs), including their purpose and use. |
| Learning objectives | * Define service level agreement, and explain how SLAs help the Service Desk pe * Create a new service level agreement * Enable SLA hold * Define a commitment and a notification * Apply an SLA * Use SLA hold to stop the clock * Provide an example of a service level agreement |

## Unit 9 Surveys

Estimated time: 1 hour and 30 minutes

|  |  |
| --- | --- |
| Overview | With IBM Control Desk, you can create and send customer satisfaction surveys. This unit describes the various survey techniques and tools that you can use to create a survey. |
| Learning objectives | * Determine whether to track a survey or not * Create a survey template * Create a survey |

## Unit 10 Reporting

Estimated time: 45 minutes

|  |  |
| --- | --- |
| Overview | This unit provides an overview of the reporting capability in IBM Control Desk. |
| Learning objectives | * Define reporting options * Run predefined reports |

# For more information

To learn more about this course and other related offerings, and to schedule training, visit ibm.com/training.

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