

Course Exercises

IBM Control Desk 7.6 Service Request Management Fundamentals

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About this book

Background

In the exercises for this course, you use IBM Control Desk to manage the operations of the service desk of a fictional company. Several employees of the company are involved in the exercises, and their roles are defined in the following table.

User ID	Role
bob	Self-service user and service requester
fred	User manager
jane	Service Desk manager
maxadmin	Account used to configure the system
nancy	Incident analyst
schroeder	Service Catalog designer (not used in these exercises)
scott	Service Desk analyst
steve	User and service requester

Passwords for all accounts on this image are **object00**.

Image Information

This course includes two virtual images. One has IBM Control Desk installed. This image is a 64-bit Microsoft Windows 2012 Standard Server. The second image is a 64-bit Red Hat Enterprise server which acts as a mailserver. If you need help starting the guests or accessing the operating system login screen, ask your instructor, or consult the instructions you received when you registered for this course.



Note: When running this image locally, the host computer must support 64-bit virtual machines. Most new computers can support 64-bit virtual machines. However, you might have to enable the virtualization technology in your BIOS. For more details, refer to the following website:

VMware Knowledge Base article - http://kb.vmware.com/selfservice/microsites/search.do?language=en_US&cmd=displayKC&externalId=1003944

Unit 1 Overview exercises

In these exercises, you ensure that the lab environment is operational by logging in, checking the network settings, and starting IBM Control Desk. Next, you use the features of the Service Desk to resolve various issues.



Note: Your environment might differ slightly from the one shown in the screen captures that are used in this exercise book. Sometimes your results might not exactly match the book, but the results should be similar.

Exercise 1 Logging in to the operating system

Your first step is logging in to the operating system of the lab machine.

1. Ensure that your virtual machine image is running



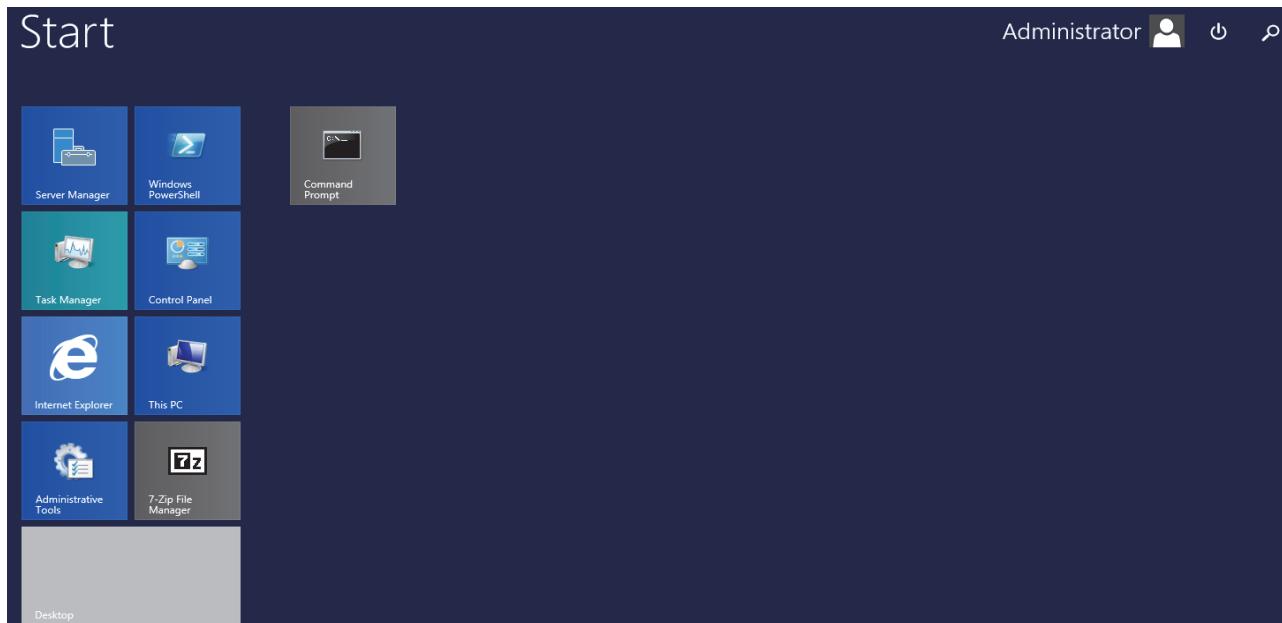
Note: You might use a different key sequence or menu selection, depending on your environment. For example, when running a virtual machine on a Windows host, you might press Ctrl+Alt+Insert to access the login screen on the virtual machine.

2. Click the left mouse button anywhere in the screen two or three times to display the login screen. The login screen defaults to Administrator as the user.
3. Enter the password **object00**.
4. Press the Enter key to log in to Windows 2012.

Exercise 2 Verifying image network configuration

The image for this course is designed to use the static IP address of **192.168.1.210** with the host name **itracr12.tiv.ibm.com**. Changing the IP address or host name can cause the software to not operate properly. In this exercise, you verify the network configuration of the system you are using.

1. Click the Windows Start icon in the lower left corner of the screen. A screen similar to the one shown below is displayed:



2. Single Click the **Command Prompt** icon. The main desktop is displayed and a command window is active.
3. Type the following command:
`ping -4 itracr12.tiv.ibm.com`
4. Verify that the fully qualified host name can be resolved. You receive a reply from the system by using the host name.

A screenshot of a Command Prompt window titled "Administrator: Command Prompt". The window shows the following output:

```
Microsoft Windows [Version 6.3.9600]
(c) 2013 Microsoft Corporation. All rights reserved.

C:\Users\Administrator>ping -4 itracr12.tiv.ibm.com

Pinging itracr12.tiv.ibm.com [192.168.1.210] with 32 bytes of data:
Reply from 192.168.1.210: bytes=32 time<1ms TTL=128

Ping statistics for 192.168.1.210:
    Packets: Sent = 4, Received = 4, Lost = 0 (0% loss),
    Approximate round trip times in milli-seconds:
        Minimum = 0ms, Maximum = 0ms, Average = 0ms

C:\Users\Administrator>
```

5. Repeat the test by running the following commands. All commands must receive a reply.

```
ping -4 itracr12  
ping 192.168.1.210
```

 **Note:** If you do not receive a reply, your operating system is not configured properly, either by a misconfigured network card or IP stack. Correct the virtual machine configuration. If you are using this system in a classroom or supported lab environment, contact your instructor or lab support personnel.

Exercise 3 Starting IBM Control Desk

The IBM Control Desk services are configured for to automatically start the class image. Batch files are provided to start and stop the services as needed. The batch file starts WebSphere Application Server, and the IBM Control Desk application server (MXServer). In this exercise, you locate and review the start and stop batch files.



Note: Do not execute the batch scripts. IBM Control Desk is already running. The purpose of this exercise is to show you a method of starting and stopping the system manually.

1. Right-click the **Start IBM Control Desk** shortcut on the desktop and select **Edit**. When you complete your review, close the Notepad without saving the file.
2. Repeat Step 1 for the **Stop IBM Control Desk** shortcut.

Unit 2 Service management exercises

This unit has no student exercises.

Unit 3 The Service Desk exercises

The purpose of these exercises is to show you the details and purpose behind many of the tasks that are done inside IBM Control Desk. In a production environment, you would expect many of these tasks to be automatically performed by templates, workflows, or customizations.



Note: Your environment might differ slightly from the one shown in the screen captures that are used in this exercise book. Sometimes your results might not exactly match the book, but the results should be similar.

Exercise 1 Simple informational service request

In this exercise, Scott, a service desk analyst, receives a call from Bob, who cannot print from Notepad. Scott can resolve this call without needing to look up a solution or reference any other source of information.

Scott starts Firefox and logs in.

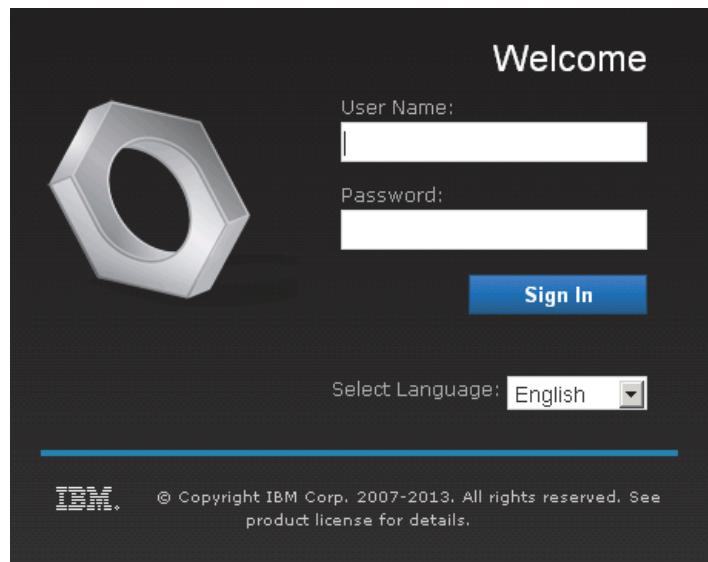
Logging in

1. Start Firebox by clicking the icon on the Windows desktop. Firefox starts and shows the IBM Control Desk login screen.



Note: Depending on the processor speed and installed memory in the machine running the itracr12 virtual image, the amount of time that is required, after starting the virtual machine and when the environment is fully operational varies. If you open Firefox and receive an error indicating the Welcome screen is unavailable, this could be the cause. Generally, waiting between 5 and 10 minutes after starting the image is sufficient. If the welcome screen is not displayed after 15 minutes, ensure that the IBM WebSphere services are showing as "Started." If they are not, attempt to start them manually. The Windows Services application is available by selecting **Administrative Tools** from the Windows **Start** menu and selecting **Services**.

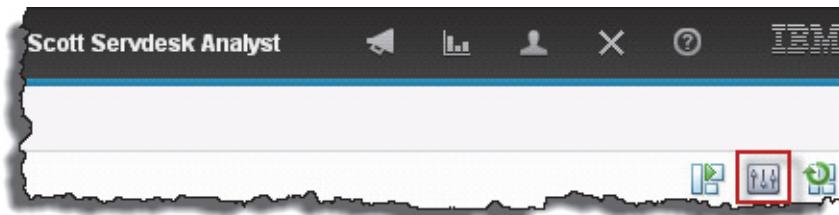
2. Sign in as Scott with the user name **scott** and the password **object00**.



Set a default Start Center

When Scott logs in, he is shown the **All Users Start Center** tab. the default tab is editable by an administrator in the security settings, or by an individual user. Since Scott is spending most of his time by performing Service Desk duties, he customizes his own environment.

3. Click the **Display Settings** icon in the upper right of the screen.



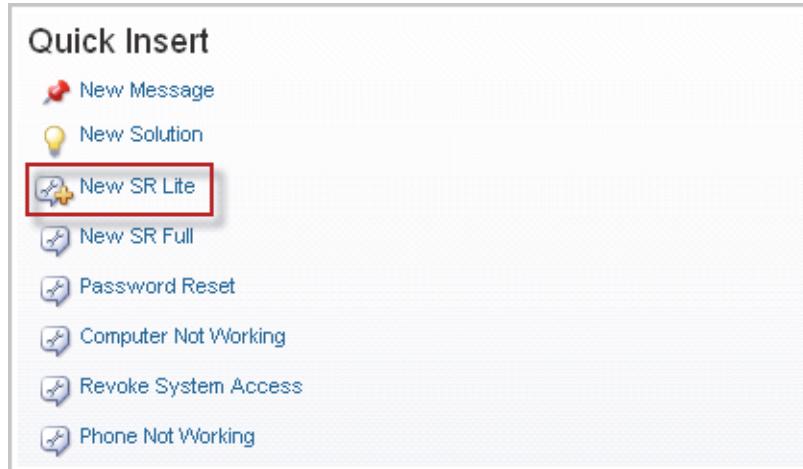
4. Select the **Service Desk Analyst** tab as **default**.
5. Click **OK**.
6. Verify that the **Service Desk Analyst** Start Center is shown.

Creating a service request

Scott receives a telephone call from Bob. He wrote a short note in Windows Notepad, but he does not know how to print it. For Scott, this issue is a simple informational request that he can resolve by using his own knowledge.

The first step is to create a service request ticket to document the contact between Bob and the Service Desk.

7. Create a **Service Request** by clicking the **New SR Lite** link in the **Quick Insert** portlet.



The **Create Service Request** application opens.

8. In the **Reported By** field, enter **Bob**, and press **Tab**.

Create Service Request

Use this form to fill out a new request for service. When you are done and press Alt + F1. The icons located next to a field may be used to as

Reported By:

BOB



Phone:

713-297-7900

E-mail:

bob@tivoli.edu

Download Remote Diagnostics Agent

Screen Capturer

Bob's contact information from his person record fills the phone and email fields.

9. Enter **bob** in the **Affected User** field and press the Tab key.

10. Click the **Select Value** icon (magnifying glass) beside the **Reported Priority** field.

Select Value

Select this service request reported priority, as determined by the person making the request. Fill in the fields below the priorities table column names and hit enter (or press the icon) to narrow the search results. Click the Priority entry to select it and close this dialog. Click the Cancel button to close this dialog without selecting a Priority.

Filter 1 - 5 of 5

Value	Description
1	<u>Urgent</u>
2	<u>High</u>
3	<u>Medium</u>
4	<u>Low</u>
5	<u>Planning</u>

Cancel

Scott asks Bob how important his printing job is. He replies that it is important because he must print several notes.

11. Click the number **3** beside **Medium**.

12. Scroll down to the Request Description section, and enter the following information into the appropriate fields:

Summary: print from Notepad

Details: Bob needs to know how to print a document from Notepad.

13. In the **Request Category** section, click the **Detail Menu** (double arrows) beside the **Classification** field and select **Suggest Classification**.

14. Select **210204 (IT Issue \ Software \ Other Software)** and click **Select Classification**.

15. Click **Submit**.

A dialog that shows the Service Request number is shown. Make a note of the SR number.

-
16. Click **Return to Start Center**.

Checking the queue

During a regular work day, Scott and the other Service Desk personnel work many tickets. New tickets appear in the Service Desk Group Queue until an agent takes ownership of them.

17. Locate the **Service Desk Group Queue** on the Start Center and sort it by descending date by clicking the **Creation Date** twice.

18. Find the service request that you created and select it.

Service Desk Group Queue				
Service Request	Class	Summary	Status	Creation Date
1010	SR	print from Notepad	NEW	5/4/13 21:20:35
SR1269	SR	Firewall Change Requests	NEW	2/19/12 12:52:16
TUSC1056	SR	asset	NEW	12/21/11 15:00:23
TUSC1041	SR	Refresh PC	NEW	12/21/11 11:50:45
SR1388	SR	Air Conditioner broken on 1st floor	NEW	10/10/11 17:18:10
SR1337	SR	Cannot resolve network password issue	NEW	9/13/11 16:38:26
SR1326	SR	Cisco 6500 switch needed ASAP, like now	INPROG	8/10/11 13:50:57
SR1325	SR	Request PC	NEW	8/10/11 13:28:49
SR1263	SR	New Asset Request	INPROG	7/15/11 12:52:30
SR1262	SR	New Asset Request	INPROG	7/15/11 12:39:39

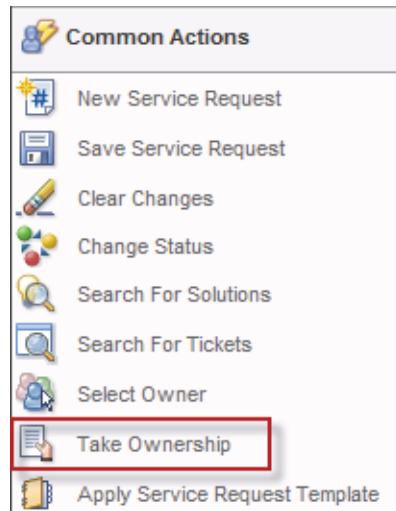
The Service Requests application opens.

The screenshot shows the Service Requests application interface. At the top, there's a navigation bar with icons for Find Service Request, Search, and various actions. Below the bar, a sidebar on the left lists options like Go To Applications, Available Queries, All Records, All Bookmarks, and several Open Service Requests. The main area displays a ticket detail for ticket number 1010, titled "print from Notepad". The ticket details include the owner (Scott), owner group (Operations Specialist Group), and status (Queued). A red box highlights the ticket number and title. Another red box highlights the "Queued" status in the status bar.

Notice that the ticket number, description, and status are clearly visible.

Taking ownership

19. Take ownership by clicking **Take Ownership** in the navigation bar under **Common Actions**.



Notice that taking ownership completes the **Owner** field and changes the status to Queued. Scott is now indicated in the **Owner** field as the person that is managing the service request process for this ticket.

Marking ticket as In Progress

20. Change the status to **In Progress** by clicking **Change Status** on the navigation bar.

The image shows two windows. The top window is a 'Common Actions' menu with various options like 'New Service Request', 'Save Service Request', and 'Change Status'. The 'Change Status' option is highlighted with a red box. The bottom window is a 'Change Status' dialog box. It has fields for 'Service Request' (containing '1010' and a link to 'print from Notepad'), 'Status' (containing 'QUEUED' and 'Queued'), and a dropdown for 'New Status' which is set to 'In Progress'. There are also fields for 'Status Date' (containing '5/14/13 22:39:25') and 'Memo'. At the bottom are 'OK' and 'Cancel' buttons.

21. Set the new status to **In Progress** and click **OK**.

Categorizing and prioritizing

Scott must ensure that the ticket has both a category and a priority that is assigned to it. He already used the suggested category when he initially created the ticket, but if he had not, he could easily enter that information in the next step.

The phone conversation with Bob, in addition to the level Scott selected for the reported priority, helps Scott decide what impact and urgency to give the request. Bob is the only one affected, and he already stated that it is important. Therefore, Scott determines that the impact is low, and urgency is medium.

22. Scroll to **Service Request Details** and click the **Categorize and Prioritize** icon.



23. Enter a **4** for impact and a **3** for urgency in the appropriate fields. The **Internal Priority** field automatically displays a **4** based on the other values that were provided.

A screenshot of a "Calculate Priority" dialog box. It contains several input fields: "VIP" (checkbox), "Reported Priority" (dropdown set to 3), "CI Impact" (dropdown set to 3), "Impact" (dropdown set to 4 with a magnifying glass icon), "Urgency" (dropdown set to 3 with a magnifying glass icon), and "Internal Priority" (dropdown set to 4). Below these fields is a checkbox labeled "Is Global Issue?" which is unchecked.

Scott could enter an affected asset or other information here, but none of the fields are relevant to the current issue.

24. Click **OK**.

Informing the requester

All the basic fields are completed, and it is time to resolve the request. Without looking up anything, Scott knows how to print from Notepad. In fact, he believes that this information is so common that he does not check to see whether there is an existing solution. Normally, if there were no existing solution, Scott would create one.

Scott tells Bob to click **File > Print**. The solution works for Bob. Bob tells Scott that he can now print from Notepad.

Verifying resolution

Scott confirms with Bob that his issue is resolved. Bob tells Scott that he needs no additional help.

Resolving ticket

Scott now indicates what was done and resolves the ticket.

Creating work log entry

Scott writes what he did on the ticket so that any other agent who views the ticket knows how it was resolved.

25. Click the **Log** tab.

The screenshot shows a software interface with a top navigation bar containing tabs: List View, Service Request, Solution Details, Activities, Related Records, Log, Service Address, and Map. The Log tab is highlighted with a red box. Below the navigation bar, there are fields for Service Request (1010), Site, and Status (INPROG). A subtab bar has Work Log and Communication Log tabs, with Work Log selected. Under Work Logs, there is a table header with columns: Record, Class, Created By, Date, Type, Summary, and Viewable?. A message "...No rows to display..." is shown below the table. At the bottom right is a 'New Row' button.

26. With the **Work Log** subtab selected, click **New Row**.

27. Change the **Type** field to **Work**.

28. In the **Summary** field, type **Informed requester**.

29. In the **Details** field, type **Told Bob how to print from Notepad**.

The screenshot shows the Work Log entry form. The table header includes columns: Record, Class, Created By, Date, and Type. A single row is displayed with values: 1010, SR, SCOTT, 5/14/13 23:04:25, and WORK. Below the table is a 'Details' section. On the left, there are fields for Record (1010), Class (SR), Created By (SCOTT), Date (5/14/13 23:04:25), and Type (WORK). On the right, there are fields for Summary (Informed requester) and Details. The Details field contains the text "Told Bob how to print from Notepad." with a rich text editor toolbar above it.

30. Click the **Save Service Request** icon at the top of the page.



Note: You can also save the service request by using the **Common Actions** menu on the navigation bar.

Resolving the ticket

31. Resolve the ticket by changing the status to Resolved. If you cannot remember how to change the status, see step [Step 20](#) on page 3-7.

The dialog box is titled "Change Status". It contains fields for "Service Request" (1010) and "Status" (INPROG). A dropdown menu under "New Status" shows "Resolved" as the selected option. The "Status Date" field shows "5/14/13 23:09:55". There is a "Memo" text area and "OK" and "Cancel" buttons at the bottom.



Note: Control Desk automatically completed the **Actual Finish** field of the **Key Dates** section, but you must go to the **Service Request** tab to see the change.

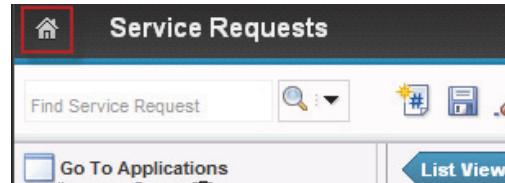
32. Click the **Service Request** tab.

33. Verify that the **Actual Finish** time has been entered.

The "Key Dates" section includes fields for "Reported Date" (5/14/13 21:20:35), "Target Contact" (empty), "Actual Contact" (empty), and "Actual Finish" (5/14/13 23:09:55). The "Actual Finish" field is highlighted with a red border.

34. Verify the progress bar indicates that the ticket is **Resolved**.

35. Return to the **Start Center**.



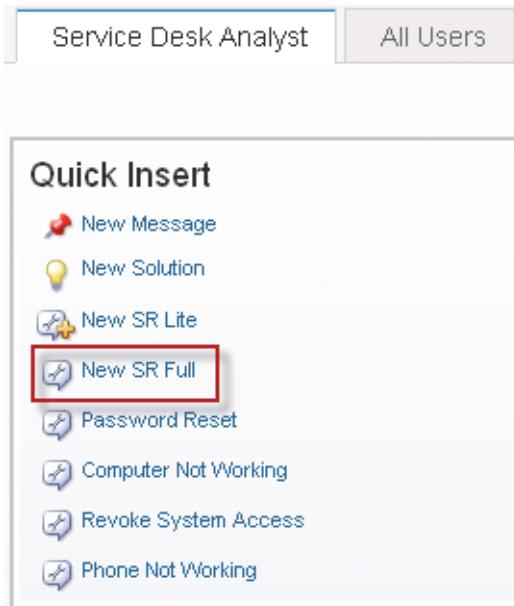
Exercise 2 Solution lookup

Scott receives a call from Steve, who is having slow network performance while accessing a server. He simply wants to know whether this slowness is a known problem. An existing solution exists that Scott must search for.

Creating a service request

Scott starts the Service Request from the Start Center.

1. Take a minute to look at the categories of information Scott has access to from the start center. See whether any of the portlets have a possible solution to this problem. Do not spend too much time looking until you create a service request.
2. In the Quick Insert section, click **New SR Full**.



Notice that this time the Service Requests application immediately opens and creates a new service request without first prompting you for initial information.

Taking ownership

3. Take ownership by clicking **Take Ownership** in the navigation bar under **Common Actions**.
Scott is now indicated in the **Owner** field as the manager of the service request process for this ticket. The status changes to Queued.

Marking ticket as In Progress

4. Change the status to **In Progress** by clicking **Change Status** on the navigation bar.
5. Set the status to **In Progress** and click **OK**.

Entering basic information

Entering the Reported By person

6. Click the **Detail Menu** (double arrow) icon beside the **Reported By** field, and choose **Select Value**.

Person	Name	Title	Department
ST			
STEVE	Steve Requester		
EPMANALYST1	analyst1 ep		
EPMANALYST2	analyst2 ep		
SCCDGUEST	Guest		

7. Filter the **Person** field for **ST**, and select **STEVE**.
8. The **User Information** section fields are completed.

Entering the summary

9. Type **Slow network**.

Entering the details

10. Type **Steve is getting slow performance while reaching a remote server. He wants to know whether the slow performance is a known issue.**

Entering the classification

You learned how to enter a classification in the previous exercise. However, in this exercise you use the Categorize and Prioritize feature.

11. Click the **Categorize and Prioritize** icon beside **Internal Priority**.
12. Beside the **Classification** field, click the **Select Value** icon.

13. In the **Description** filter field, type **performance** and press Enter.
14. Click the **21030301 IT Issue \ Networks \ Wan \ Performance** entry.

Classification	Description	Organization	Site
21030201	IT Issue \ Networks \ Lan \ Performance		
21030301	IT Issue \ Networks \ Wan \ Performance		
21030401	IT Issue \ Networks \ Internet \ Performance		
SDANWPERF	IT Issue \ Networks \ Performance		

Indicating impact and urgency

Steve is the only one affected as far as Scott knows, and he already stated that it is important. Scott determines that the impact is Medium and urgency is High.

15. Enter a **3** for impact, a **2** for urgency, and a **2** for reported priority in the appropriate fields. The **Internal Priority** field automatically displays a **2**.
16. Click **OK**.

Searching for the solution

Scott filled out the basic information for this ticket, but he now must research the problem further.

17. Click the **Search For Solutions** icon on the navigation bar under **Common Actions**.
18. Enter a search term of **slow** and click **Search**.
19. One solution is displayed. Expand the solution.

Solution	Description	Times Applied
	★★★★★ SPOC1042 Network Slow Response at Southern Sites 0	

20. Scroll down, if necessary, and view the contents of the **Symptom**, **Cause**, and **Resolution** fields.
The information presented sounds like it might match this issue.

Trying the solution

Scott asks Steve some more questions about the location of the server he is trying to reach, and about his network performance on the LAN. He runs some diagnostics to be sure. After a few minutes, it is apparent that the solution matches his issue. Because this solution matched the request, Scott applies the solution to the ticket.

Using the solution

21. Click **Use Solution** on the left under the solution number.

Solution: SPOC1042 Author: NANCY

Symptom:
Intermittent slow response on all application at Southern locations.

A brief message at the top of the screen indicates that the solution is applied.



22. Click the **Solution Details** tab to view the applied solution.

List View Service Request Solution Details Activities

You can apply a solution to the Incident, and set a status as to how this applied solution information

Search for Solution

Service Request: 1011 Slow network

Solution: SPOC1042 Network Slow Response at Southern Sites

Solution Status: CONSIDER

The solution is now under consideration. When more information is known, the status can be changed to successful or failed.

23. Click the **Service Request** tab to return to the main service request screen.

Linking the global issue

Scott must associate this service request with the existing global issue.

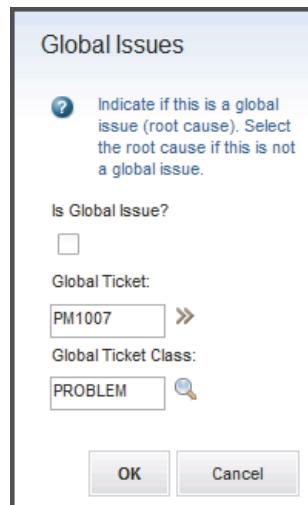
24. Click the **Global Issue** icon.



From the **Global Issues** window, you can specify a ticket as the root cause of a global issue, or to specify a global ticket as the cause for this ticket. In this case, you specify another ticket as the cause.

25. Click the **Detail Menu** icon beside **Global Ticket**, and click **Select Value**.

26. Click **PM1007 Network Slow**.



27. Click **OK**.

The ticket is automatically saved, and the global issue icon changes.

28. Click the **Related Records** tab.

29. Click the **Detail Menu** icon for the problem record and select **Go To Problems**.

The screenshot shows a software interface titled "Related Tickets". At the top, there are buttons for "Filter", "Search", "Sort", and "1 - 1 of 1". Below this is a table with columns: "Related Record Key", "Description", "Class", "Status", and "Relationship". A single row is selected, showing "PM1007" in the key column and "Network slow" in the description column. The "Class" column shows "PROBLEM", "Status" shows "INPROG", and "Relationship" shows "ISGLOBAL". Below the table is a "Related Work" section with a "Go To Problems" button. A context menu is open over the "Go To Problems" button, listing "Select Value", "Classification", and "Attributes". The "Go To Problems" button itself is highlighted with a red box.

30. Click the **Related Records** tab for the problem.

Notice that a change order is associated with this problem. **CM1152** is **In Progress**.

31. Click **Return** at the upper right of the page to go back to the service request.

Resolving the ticket

Scott shares the news with Steve, and tells him that the change CM1152 was entered, and is in progress. Steve is satisfied with the answer. Scott asks if he can open an incident to resolve the issue, but Steve declines because he is satisfied that a change is being worked. Steve asks Scott to close the ticket, and they end their call. Scott indicates what was done and resolves the ticket.

Creating a work log entry

Scott must write what he did on the ticket so that any other agent who views the ticket knows how it was resolved. It might be obvious from the fact that a solution was applied, but Scott's company wants all the information to be recorded to avoid confusion.

32. Click the **Log** tab. Notice that an associated client note from Problem record PM1007 exists in the log.
33. With the **Work Log** subtab selected, click **New Row**.
34. Change **Type** to **Work**.
35. In the **Summary** field, type **Informed requester of open change record**.
36. In the **Details** field, type **Told Steve that there is an open change record to address this known problem**.
37. Save the record.

The screenshot shows a "Work Log" entry form. The "Summary" field contains the text "Informed requester of open change record". The "Details" field contains the text "Told Steve that there is an open change record to address this known problem." Below the details field is a rich text editor toolbar with various icons for font, size, and alignment. The text "Told Steve that there is an open change record to address this known problem." is also visible in the bottom right corner of the screen.

Resolving the ticket

38. Change the status of the ticket to **Resolved**.
39. Return to the **Start Center**.

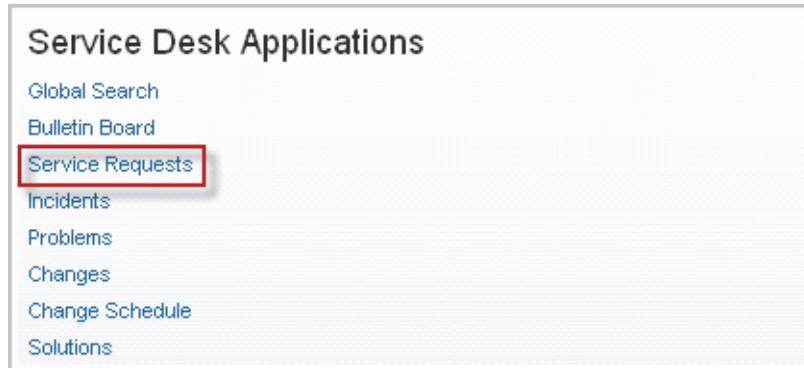
Exercise 3 Creating a solution

In this exercise, Scott receives another call from Bob, who cannot print from another application, PayrollMaster. There is no existing solution, so Scott must create one. Printing from PayrollMaster sounds like a simple informational request, and Scott is familiar with the PayrollMaster program. However, it is not something that everyone is familiar with.

Scott asks Bob how important his printing job is. He replies that it is important. There is no other way of getting the information out of the application, and he needs the document for a meeting. However, the meeting is not until next week.

Creating a service request

1. Click the **Service Requests** option in the **Service Desk Applications** portlet.



2. Click **New Service Request** in the **Common Actions** section of the navigation bar.



Note: As a Service Desk Analyst, you used three different methods of creating a service request: Quick inserts **New SR Lite** and **New SR Full**, and **New Service Request** from within the **Service Requests** application.

Recording the initial information

3. Record the following fields:
 - Source: **PHONECALL**
 - Reported By: **BOB**
 - Common Requests: **{leave blank}**
 - Reported Priority: **2**
 - Summary: **Printing from PayrollMaster**
 - Details: **Bob does not know how to print from PayrollMaster.**

4. Click **Submit Now**.

Taking ownership

5. Take ownership by clicking **Common Actions > Take Ownership**.

Marking the ticket as In Progress

6. Change the status to **In Progress**.

Categorizing and prioritizing

The phone conversation with Bob, in addition to the level Scott selected for the reported priority, helps Scott decide what impact and urgency to give the request.

Because Bob is the only one affected, and he already stated that the print job is important, Scott determines that the impact is high. However, because he does not need to print for at least a week, Scott believes the urgency to be medium.

7. Click **Categorize and Prioritize**.
8. For the **Classification**, enter **4107**.
9. Enter a **2** for impact and a **3** for urgency.
10. Click **OK**.

Searching for a solution

Scott knows how to print from the PayrollMaster application, but he understands that not everyone does. He must make sure that there is an existing solution; if none exists, he must create one.

11. Click **Common Actions > Search For Solutions** on the navigation bar.

12. Enter a search term of **PayrollMaster** and click **Search**.

No solutions are shown. Try widening the search.

13. Click **Clear Fields**, then click **Search**.

Search Results		Filter	Search	Print	Up	Down	1 - 5 of 13	Next
Solution	Description			Times Applied	Priority	Priority	% Effectiveness Score	
▶ ★★★★★	SPOC1042 Network Slow Response at Southern Sites	1					100	
▶ ★★★★★	TUSC1002 Billing System Performance degradation	2					100	
▶ ★★★★☆	SPOC1025 Corporate network account password reset							
▶ ★★★★☆	SPOC1027 How to release a software license	0						
▶ ★★★★☆	SPOC1028 How to order hardware or software	0						

A few solutions are shown, but none tells how to print from PayrollMaster.

14. Press **Close**.

Because you know the answer to Bob's request, you tell him to print by using the **Reporting > Print** menu item in the PayrollMaster application. He tries this solution and is able to print.

Verifying the resolution

Scott verifies with Bob that his issue is resolved. Bob says that he needs no additional help.

Creating a solution

Scott creates a solution so that the next time this problem occurs, the agent that answers the telephone knows how to handle it.

15. Click the **Solution Details** tab.

16. In the **Resolution** field, type **To print from PayrollMaster, click Reporting > Print**.

17. Use the text markup tools to make **Reporting > Print** show up in bold print.

18. To make the solution visible to Bob if he reviews the service request himself, select the **Self-Service Access** option. You might need to scroll up.

19. Save the ticket.

Currently, the solution applies only to, and is only visible from, this service request. This type of solution is known as an *ad hoc* solution. However, an automated process goes through all of the ad hoc solutions in service requests and creates stand-alone solutions from them.

Complete the ticket

20. Create a work log with this information:
 - Summary: **Informed requester how to print**
 - Details: **Told Bob how to print a PayrollMaster document, and created a solution since none existed.**
21. Save the ticket.
22. Change the ticket status to **Resolved**.
23. Return to the **Start Center**.

Exercise 4 Changing requests

In this exercise, Steve walks to the support department and asks to have his desktop computer replaced. It is too old and slow to do the work he needs. Computers three years and older can be replaced under company policy.

As Scott, you create a service request.

1. Start the **Service Requests** application by clicking the navigation bar **Go To Applications > Service Desk > Service Requests**.

This sequence is another method of starting applications, and is useful if the application you want to use is not in the portlets on your Start Center.

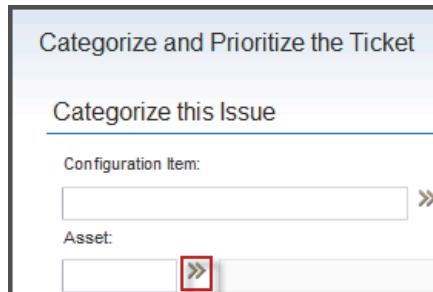
2. Click **New Service Request**.
3. Enter the source. Remember that Steve walked up to the support department.
4. Enter **Steve** in the **Reported by** field.
5. Enter an appropriate value for the reported priority.
6. Enter a summary of **User requires a new desktop computer**.
7. Give the ticket details of your own choosing. Make sure to mention that the requester says that his computer is over three years old and he would like it replaced.
8. Click **Submit Now**.
9. Take ownership.
10. Click **Common Actions > Service Request in progress** then click **OK**.
This sequence is an alternate way to quickly change the status of the ticket.

11. Click **Categorize and Prioritize**.

Indicating the asset

Because this issue is about a specific item, Scott must list the asset.

12. Select an asset by clicking the **Detail Menu** icon after the **Asset** field and selecting **Select Value**.



The window shows all assets that belong to Steve.

13. Select **TUSC1057**.

The screenshot shows a 'Select Value' dialog box. At the top, there are filter fields for 'User/Custodian' set to 'STEVE' and 'Custodian' set to 'STEVE'. Below the filters is a toolbar with icons for 'Filter', 'Search', and navigation. A table lists assets with columns for Asset, Description, Location, Site, and Reconciliation Failures?. The row for 'TUSC1057' is highlighted in blue, showing 'Lenovo G550 Desktop' as the description, 'SOUTHERN' as the location, 'PMSCRTP' as the site, and a small checkbox indicating no reconciliation failures.

Asset	Description	Location	Site	Reconciliation Failures?
TUSC1057	Lenovo G550 Desktop	SOUTHERN	PMSCRTP	<input type="checkbox"/>

At the bottom right are 'Continue' and 'Cancel' buttons.

Scott must verify that the computer is over three years old.

14. Using the **Detail Menu** icon again, select **Go To Assets**. View the installed date to ensure that it is at least three years ago.

The screenshot shows a 'Purchase Information' form. It includes fields for Vendor, Manufacturer, Installation Date (set to 3/3/08), and Purchase Price (set to 2,000.00). The 'Installation Date' field is highlighted with a red box.

The date is well over three years ago.

15. At the upper right corner of the screen, click **Return**.



16. Enter a classification / class description of **20104 - Request for Service \ IT \ New Asset Request**.

Scott asks Steve how important getting the computer replaced is. Steve states that he cannot do his work any longer on it, and he has a deadline that is coming up. Many people depend on his prompt work.

17. Enter the impact and urgency you feel the issue deserves.

18. Click **OK**.

Informing requester of status

Everything looks correct, so Scott tells Steve that he is putting in a request to have the computer changed.

Starting a workflow

Because other people use this ticket to help resolve the request, Scott double-checks it to ensure that it has all the necessary information.

19. Verify that the following fields are complete. Provide any missing information.

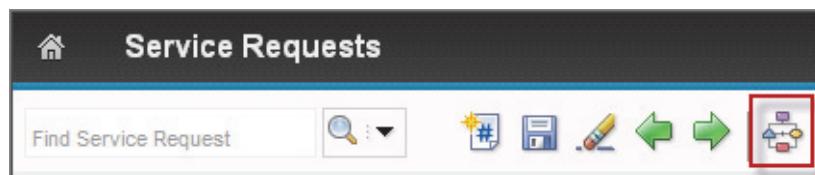
- Reported By
- Summary
- Details
- Classification
- Priority
- Asset

20. Create a work log entry with the following information:

- Summary: **Starting workflow to obtain a new IT asset.**
- Details: **Checked that computer was over three years old. After verifying the age of the computer, I started the new IT asset workflow.**

21. Save the ticket.

22. Click the **Route Workflow** icon.



23. Select the process **ITNEWASSET** and click **OK**.

24. In the **More Actions** section of the navigation bar, click **Workflow >View Workflow Assignments.**

25. Click **View Workflow Map.**

26. Verify that the service request is waiting for management approval (MGRAPPR).

27. Click **OK**.

28. Return to the **Start Center**.

The request is entered, and the ticket now follows the processes that are detailed for IT asset management. Additional information about managing IT assets is detailed in the course **IBM Control Desk 7.5 IT Asset Management Fundamentals**.

Exercise 5 Working with existing tickets

In addition to calls that come in, agents must look for existing tickets that they can resolve. These tickets can come from self-service, other agents, or automated processes. Because agents transfer ownership of tickets, it is vitally important for agents to leave well-written, complete work logs.

Checking the inbox and work view

1. From the **Service Desk Analyst** tab, check the **Inbox / Assignments** for anything that must be worked on.

There is a problem with Steve's request. It should have been transferred to Steve's manager for approval, but Steve's person record does not have a valid entry for supervisor. Scott fixes the issue by routing the request to Steve's manager. He can ask HR to fix the person record later.

2. Click **Route**.
3. Click **Reassign**.
4. Click **Select Value**.
5. Find and click **Fred**.
6. In the Memo field enter: **Steve's person record is missing manager**.
7. Click **Ok**.
8. Return to the **Start Center**.
9. Verify that the inbox is empty.

Search for new unassigned service requests

10. Check for any new unassigned service requests. Open the **Service Requests** application by using either of the following methods:
 - The **Service Requests** item in the **Service Desk Applications** portlet
 - The item in the **Go To Applications** navigation bar

11. Filter for queued tickets by typing **que** into the **Status** field and pressing Enter.

Service Requests						
Service Request	Summary	Reported By	Customer	Internal Priority	Priority	Status
			>>			que
TUSC1057 ⁱ	New Asset Request	BOB		4		QUEUED
TUSC1070 ⁱ	Update Asset to New Owner	BOB			4	QUEUED
TUSC1072 ⁱ	Asset update	BOB			4	QUEUED
TUSC1074 ⁱ	New Location for Asset	BOB			4	QUEUED
TUSC1076 ⁱ	Asset Update New Group	BOB			4	QUEUED
TUSC1078 ⁱ	Asset status Update	BOB			4	QUEUED
TUSC1080 ⁱ	Not Primary user	BOB			4	QUEUED

There are several tickets open from Bob. They seem to be related to assets, and Jake is already working with Bob. So everything seems to be under control. Look for new tickets next.

12. Try filtering for new tickets by typing **new** into the **Status** field and pressing Enter.

Service Requests						
Service Request	Summary	Reported By	Customer	Internal Priority	Priority	Status
			>>			new
SR1039 ⁱ	Security intrusion Alert on Several PCs at Site 156	SCOTT			3	NEW
SR1057 ⁱ	Error when installing software	BOB			3	NEW
SR1064 ⁱ	Can not reach Oracle Financial web site	FRED		1		NEW
SR1269 ⁱ	Firewall Change Requests	BOB				NEW
SR1325 ⁱ	Request PC	BOB				NEW
SR1337 ⁱ	Cannot resolve network password issue	JACKSON			2	NEW
SR1388 ⁱ	Air Conditioner broken on 1st floor	BOB				NEW
TUSC1041 ⁱ	Refresh PC	BOB				NEW
TUSC1056 ⁱ	asset	BOB				NEW

Select Records

As Scott is reviewing the new ticket list, he notices that one of them has an internal priority of 1. Because this request is urgent, he opens the ticket and prepares to work the issue.

Opening the ticket

13. Open the high-priority ticket by clicking the ticket number.

The ticket opens with the **Service Request** tab selected.

The screenshot shows a ticket detail view for SR1064. The ticket summary is "Can not reach Oracle Financial web site". The ticket is assigned to "Owner: BOB" and has an "Internal Priority: 1". The "Target Finish" date is listed as "3/19/11 10:43:36". The ticket status bar at the bottom shows a timeline with colored segments: New (green), Queued (light grey), In Progress (grey), Pending (light grey), Resolved (light grey), and Closed (light grey). The "Service Request" tab is currently selected.

Do not take ownership of the ticket yet. Scott must determine what is going on first.

Viewing existing information

Scott looks over the existing fields in the ticket, especially the **Summary**, **Details**, and **Reported Date**. There is little information in this ticket.



Note: Because the class demonstration data was created in the past, the reported date is old compared to the date when you take this course. For the exercise, assume that the reported date was only a few minutes ago.

Scott then looks at the solution details and related records but finds nothing there. The only item that is left is the work log.

14. View the work log.

Summary:

No time to resolve

Details:

Fred is in an important off-site meeting and cannot reach the financial web page. He had to hang up before we could work the issue.
No further details are available

Scott sees that Fred reported this issue a few minutes ago but had to end the call abruptly because of a meeting. Scott wants to check whether a followup email was sent.

15. Look at the communication log.

The screenshot shows a software interface for viewing communication logs. At the top, there are two tabs: "Work Log" (which is selected) and "Communication Log". Below the tabs, the title "Communication Logs" is displayed, followed by a toolbar with various icons for filtering, searching, and navigating. A table header row is shown with columns: "Originating application", "ID", "Is Global Issue?", "Created By", "To", "Date", and "Subject". Below the header, a message "...No rows to display..." is visible.

There are no entries, so nothing was sent. The work log says that no other information is available, so this lack of documentation is expected.

If Scott needed more information, he could look at the ownership and status history of the ticket.

16. Click **More Actions > View History**.

Scott can see that nobody has owned the ticket, and it has been only in the New status.

17. Click **OK**.

Scott knows that if the requester is unwilling or unable to work the ticket that the priority must be lowered. He decides to take ownership of the ticket and work the issue.

18. Take ownership of the ticket.

19. Set the status to **In Progress**.
20. Click **Common Actions > Search For Tickets**.
21. Search for tickets with the same classification, **210701**.



Note: The fastest way to enter the classification from the ticket is to click the icon to the right of the **Detail Menu** arrows, which is **Copy from Ticket**. It pulls the classification from the classification field in the service request and places it, with the proper search value in the classification field.

Search Results Filter > 🔎 🖊️ ⬆️ ⬇️ 1 - 5 of 7 ➡️				
	Is Global?	Incident	Description	Status
<input type="checkbox"/>	▶	TUSC1030	Oracle system appears to be down -website error 404	NEW
<input type="checkbox"/>	▶	TUSC1028	Oracle system appears to be down -website error 404	NEW
<input type="checkbox"/>	▶	TUSC1025	Oracle system appears to be down -website error 404	NEW
<input type="checkbox"/>	▶	IM1026	Unable to access Oracle Financials	RESOLVED
<input type="checkbox"/>	▶	IM1030	oracle Batch job 7120 failed on second attempt	NEW

The system shows all tickets that share a classification. There are many tickets with similar issues, but some are old and others are already resolved.

22. Add a filter to the results to remove resolved issues and issues before Fred reported his problem.
 - Status:**!=resolved**
 - Status Changed: **>12/17/11**

Search Results Filter > 🔎 🖊️ ⬆️ ⬇️ 1 - 2 of 2 ➡️				
	Is Global?	Incident	Description	Status
		TUSC1030	Oracle system appears to be down -website error 404	NEW

23. Press Enter to refresh the results.
24. Switch between the tabs for **Search Incidents**, **Search Service Requests**, and **Search Problems**. The search parameters are retained, but the type of tickets that are shown is filtered.

25. Open the details of one of the tickets by clicking the triangle beside the ticket number.

	Service Request	Description
<input type="checkbox"/>	SR1044	Unal
<input type="checkbox"/>	SR1048	Can'
<input type="checkbox"/>	SR1047	Brow

Service Request Details

Service Request: SR1044 Owner:  

26. Click the **Detail Menu** icon for the ticket and select **Go To Problem**, **Go To Incidents**, or **Go To Service Request** depending on the ticket you chose.

27. Review the details; then, return to the list.

Scott determines that these tickets are not related.

28. Click **Return**, then click **Close** to stop searching.

29. Click the **Service Request** tab.

Scott calls Fred and asks to work the service request. Fred indicates that he is in the meeting for the rest of the day, and that he can wait until tomorrow to try the financial web page again. They both agree to lower the urgency to a **3**, and impact to a **2**.

30. Change the Impact, Urgency, and Reported Priority to match Scott's conversation with Fred.

31. Create a work log detailing the phone conversation with Fred. Include the changes that are made to the record in your details.

32. Save the record.

33. Change the status to **pending**.

When Fred calls back to work the problem, they perform initial troubleshooting and might open related Incident and Problem records, or associate this Service Request with a global issue.

34. Return to the **Start Center**.

Exercise 6 Transferring a ticket

In this exercise, Scott receives a call from Fred. Fred is away at a meeting, but he must give a visiting contractor access to a secure room to replace a notebook part. The contractor must have access because no computers are allowed to leave the secure area. Scott says that he will handle it and hangs up.

Scott calls the secure room and discovers that Nancy is there and can facilitate Fred's request. He decides to transfer the ticket to Nancy so that she can follow up with Fred after the contractor leaves.

1. Open the **Service Requests** application.
2. Click the **New Service Request** icon.
3. For Common Requests, enter **SDAREQFAC Request Facility Access**.



Note: When you enter information into the Common Requests field, you are choosing a template that is applied to the ticket. Ticket templates allow you to quickly enter data for a common type of ticket. For instance, the **SDAREQFAC** template assigns an owner group, sets a classification, and sets an internal priority and summary.

4. Complete the fields for **Source**, **Reported By**, **Summary**, and **Details**.
5. Enter a reported priority of **1** because the contractor can leave if he is not allowed access to the room and bill the company for his time.
6. Click **Submit Now**.
7. Enter an impact and urgency.
8. In the Specifications section, enter appropriate values for both attributes.
9. Enter a work log stating the work that must be done and that Fred must be contacted with the results after the contractor leaves.

Transferring the ticket

Because all the basic fields are completed, Scott can transfer the request.

10. Click **Common Actions > Select Owner**.

11. Open the Persons filter, enter person group **srmdesk** and person **nan**, and press Enter.

The screenshot shows a table with three columns: Person Group, Person, and Name. The Person Group column contains 'srmdesk'. The Person column contains 'nan'. The Name column contains 'NANCY' with the subtitle 'Nancy Incident Analyst'. A red box highlights the 'Filter' button at the top left of the table header.

12. Select **Nancy**. Notice that the status has changed to Queued and Nancy is listed as the owner.

13. Return to the Start Center.

14. Sign out.

Resolving the request

Next, you sign in as Nancy, work the service request, and send Fred a confirmation email.

15. Sign in as **Nancy Incident Analyst** with the user name **nancy** and the password **object00**.

16. Open the **Service Requests** application.

Nancy is looking for the new service request that Scott is sending her. She decides to use the query **All open service requests that are owned or controlled by the logged in user** to quickly find it.

17. Click the query and open the service request.

The screenshot shows the Service Requests application interface. On the left, there is a sidebar with a 'Available Queries' section containing various service request filters. One item, 'All open service requests that belong to the logged user', is highlighted with a red box. The main area displays a table of service requests with columns: Service Request, Summary, and Reported By. The second row, which has a red box around its entire row, represents a service request for 'Request Facility Access' reported by 'FRED'. Other rows include requests from 'BOB', 'JAMESJS', and 'SRM1016'.

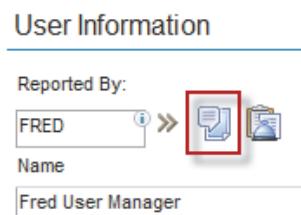
Note: Clicking the Available Queries heading minimizes the other sections. If you need more room horizontally, you can click and drag the right border to resize the menu.

18. Read the ticket fields and the work log. From what Scott entered earlier, Nancy can figure out what must be done.
19. Change the status to **In Progress**.

If you do not see the option that you are looking for, you might need to click the **Common Actions** heading.

Shortly after putting the request in progress, the contractor knocks on the door, and Nancy escorts him to the broken notebook. He replaces the system board, and Nancy verifies that the notebook is working properly. She escorts him out of the secure room. Now that the notebook is repaired, send Fred a confirmation email.

20. Click the **Service Request** tab.
21. Click **Send Email** after the **Reported By** field.



22. Select the **Detail Menu** next to the **Template** field at the top of the screen. Locate and select the template that is named SRRESRB -
23. Enter a message detailing that the contractor made the necessary repairs and that Nancy verified the work. Also, state that this request is now considered to be resolved.



24. Click **Send** to send the email.

Closing the ticket

Nancy must indicate what was done and resolve the ticket.

25. Create a work log entry that describes what you did to resolve the request.
26. View the sent email by clicking the **Communication Log** subtab.

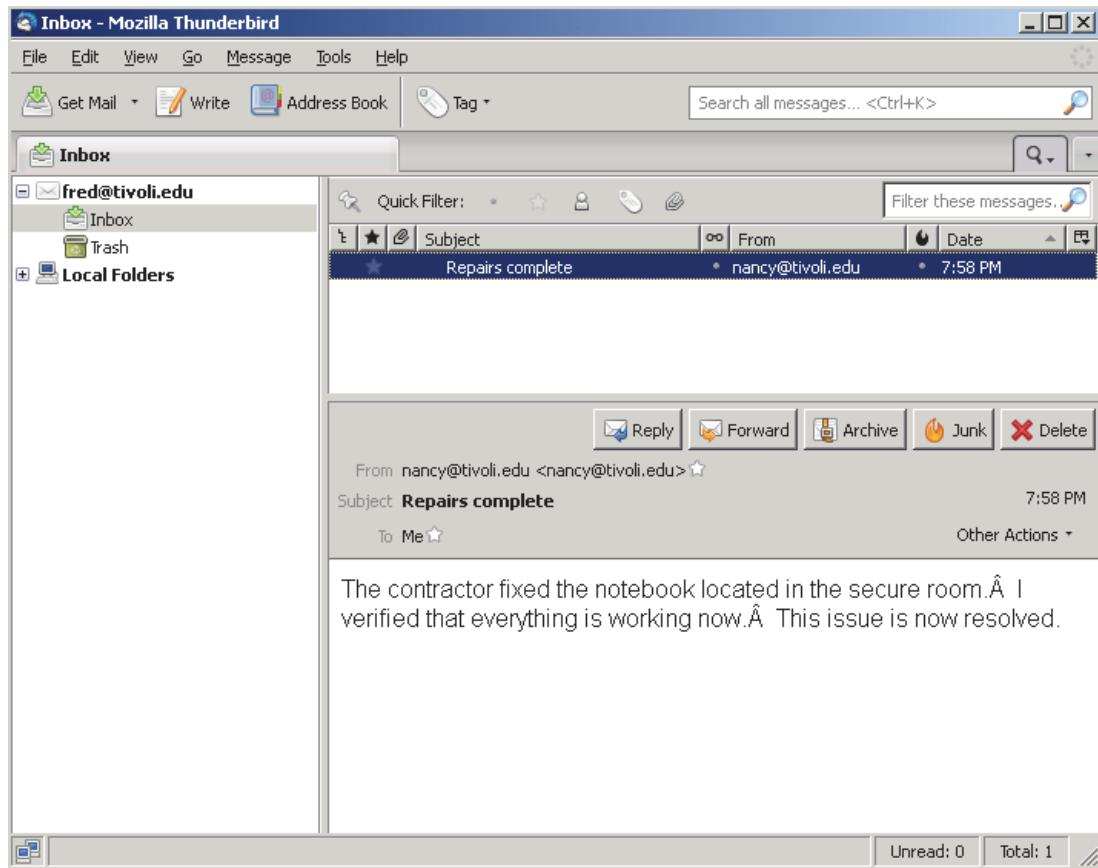
27. Set the ticket status to **Resolved**.
28. Sign out.

Viewing the email

29. Start Mozilla Thunderbird. Use the icon to the right of the Windows **Start** icon.



The email looks similar to the following example.



30. Close Mozilla Thunderbird.

Exercise 7 Handling a complex issue (Part 1, service request)

This three-part exercise familiarizes you with service request management process by guiding you through the tasks of processing a service request, incident, and problem.

Scenario: Bob Enduser notices that his computer is running slowly. Finally, he reboots, defragments the hard drive, and decides to call the help desk.

- Part 1: As Scott, a Service Desk representative, you handle the initial call from Bob. You create a service request, create an incident from the service request, and transfer the incident to an incident analyst.
- Part 2: As Incident Analyst Nancy, you manage this incident through its resolution, create a problem, and create a workaround solution for this issue in the future.
- Part 3: Nancy also acts as a Problem Analyst. As Nancy, you troubleshoot the issue and complete the work that is required to resolve the issue.

In this first part of the exercise, a Service Desk agent creates a service request ticket that is based on the call.

Issue detection

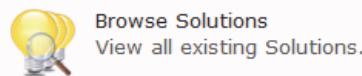
Bob is experiencing slow performance when using the custom billing application. He tries rebooting his notebook and defragmenting the hard disk, but nothing helps. He searches for a solution before calling the help desk to open a ticket.

1. Log in as Bob with user name **bob** and password **object00**.



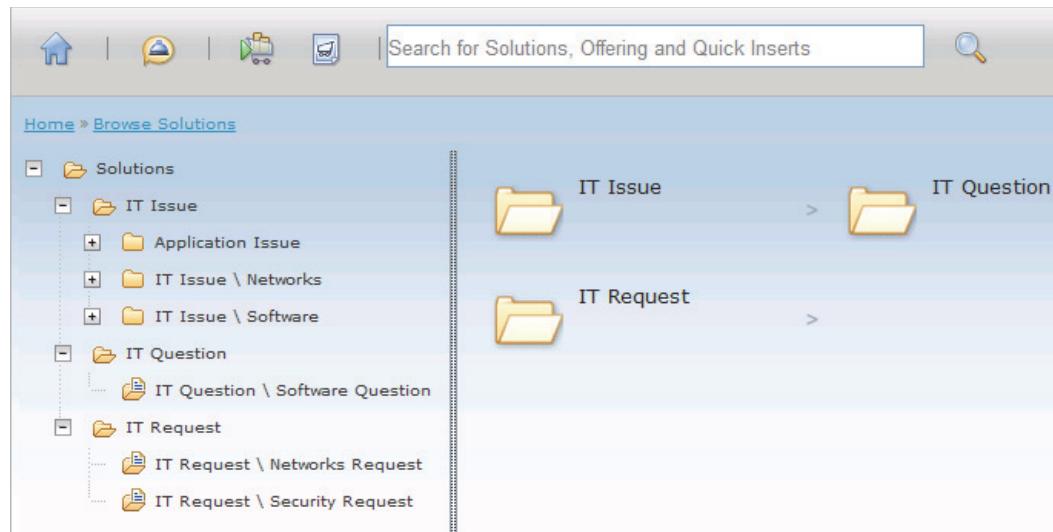
Note: You can see that Bob's Start Center is different than the others you used. This screen is the Self Service Center.

2. Click **Browse Solutions**.

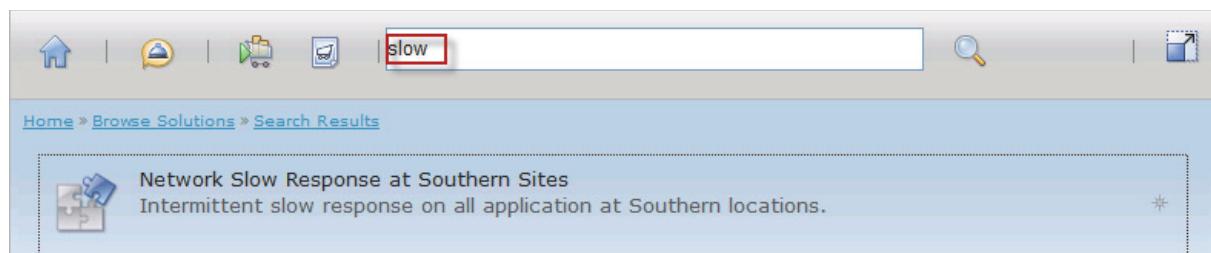


3. Expand the navigation tree to review the solution categories that are presented by default.

There are currently no hardware-related solutions.



4. In the search bar, search for **slow**.



5. Click **Network Slow Response at Southern Sites**.

Bob reviews the solution and decides it does not apply.

The screenshot shows the 'View Solution' page for 'Network Slow Response at Southern Sites' (SPOC1042). The page includes:

- A rating section with five stars and a 'Rate this solution' button.
- A 'Solution:' section showing 'SPOC1042' and 'Network Slow Response at Southern Sites' with a 'Edit' icon.
- Navigation tabs: 'Solution Details' (highlighted), 'User Feedback', and 'Attachments'.
- A 'Solution Details' section below the tabs.

6. Review the solution details; then, click **No - Return to Solution Search**. The solution does not match Bob's issue exactly but it gives him some ideas. He decides to call the help desk to ask some questions and report the issue.
7. Sign out.

Allowing users to search for solutions is part of the self-service features of IBM Control Desk. In many cases, users find their own solutions, and resolve the problem without having to ever contact the service desk.

Documenting the issue

The initial call

Bob calls the company support line and explains the issue to Scott, the Service Desk analyst. After talking with Bob, Scott realizes that the notebook computer might be experiencing a hardware, software, or networking issue and more work is required to determine which. Scott knows that the first step in fixing the issue is to create a service request ticket.

8. Sign in as Scott with user name **scott** and password **object00**.

9. From the Quick Insert portlet, click **New SR Lite**.

10. In the **Reported By** and **Affected User** fields, enter **Bob**.

11. Click the **Select Value** icon beside **Reported Priority**.

Scott asks Bob to rate, on a scale of 1 to 5, with 1 the highest, what he believes the priority to be. Because Bob must access the billing application for a special project, Bob rates it a 1, which is urgent.

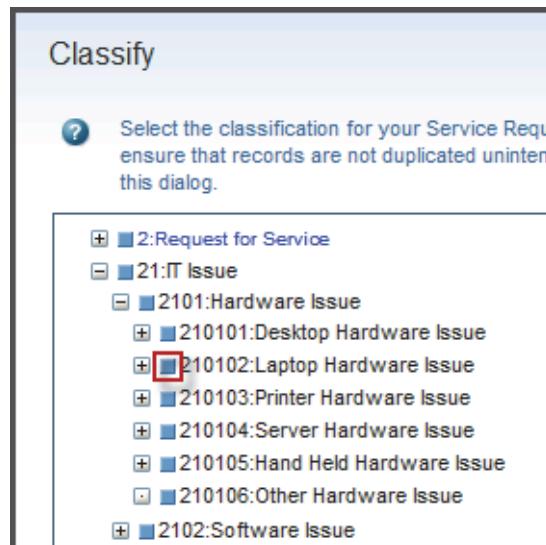
12. Select **1** for the **Reported Priority**.

13. In the **Summary** field, enter **notebook computer running slowly**.

14. In the **Details** field, enter **Bob reports that his notebook is running slowly**.

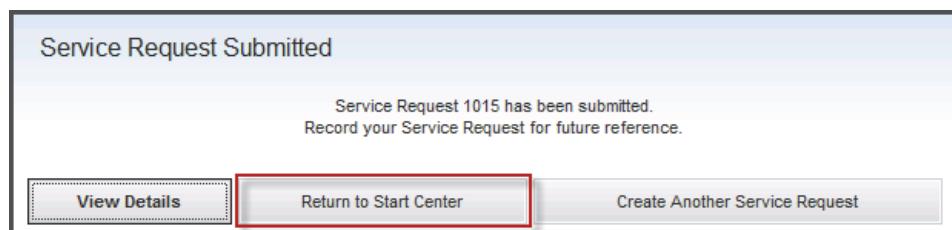
15. Click the **Detail Menu** button beside **Classification**, and select **Classify**.

16. Until some additional troubleshooting is done, Scott decides to classify the issue as it was reported. Expand the classification menu and select the **blue box** beside **210102 Laptop Hardware Issue**.



17. Click **Submit**.

18. Click **Return to Start Center**.



Taking ownership

Scott goes about his other duties, and eventually must work with the service request that he created for Bob. He starts by opening the Service Requests application.

19. From the navigation bar, click **Go To Applications > Service Desk > Service Requests**.
20. Press Enter to list all the records.

21. Hover the cursor over the Service Request record number you created for Bob.

The screenshot shows a software interface for managing service requests. At the top, it says "Ticket Details". Below that, there are several fields: "Ticket" (containing "1015" and a tooltip "Notebook computer running slowly"), "Status" (set to "NEW"), "Ticket Class" (set to "SR"), "Classification" (set to "IT Issue \ Hardware \ Laptop"), "Owner" (set to "--"), "Configuration Item" (set to "--"), "Owner Group" (set to "--"), and "Asset" (set to "--"). At the bottom of the main window, there is a row with three buttons: "1015 ⓘ", "Notebook computer running slowly", and "BOB".

Information about the ticket is displayed. This information is helpful for scanning tickets without having to open each one individually.

22. Click the record number to open.
23. Take a minute to review the record.
24. Take ownership of the ticket.
25. Set the status to **In Progress**.

Selecting the asset



Note: To locate the asset in the classroom database, change the **Filter By** field to **All** in the next step, and click **Refresh**. All assets are displayed.

26. Click the **Detail Menu** button at the end of the **Asset** field, and click **Select Value**.
Scott verifies with Bob that the affected asset is ITAM1004.
27. Select **ITAM1004**.
28. Save the service request.

Initial investigation

The basic information is entered. Scott searches through all existing solutions to try to solve this issue as soon as possible. However, Scott can already tell that this issue requires an incident.

Searching existing solutions



Note: In this scenario, Scott uses the search feature to look for an existing solution, but there is not a matching solution in the database. Do not be alarmed because the purpose is to demonstrate the method of searching, not to quickly resolve the issue.

29. In the navigation bar, click **Common Actions > Search For Solutions**.
30. In the **Search Terms (optional)** field, enter **slow** and press **Enter**.
Bob already viewed this solution.
31. Search one more time for **hardware**.
One result is shown, but it does not match the situation.
32. Try a few terms of your own, such as **performance** or **notebook**, or clear the **Search Terms** field completely.
33. Because none of the solutions matches this issue, return to the service request by clicking **Close**. Another method that Scott can try is to look for tickets that are similar to this ticket. Perhaps this issue has occurred before and no one created a solution for it.

Search for tickets

34. From the navigation bar, select **Common Actions > Search for Tickets**.
35. Click the **Search Service Requests** tab.
36. Enter **slow** in the **Search Terms** field and click **Search**.
Some Service Requests are found.
37. Review ticket **SR1053** by clicking the **view details** (triangle) icon.
38. Click the **Detail Menu** button beside **SR1053** and select **Go To Service Requests** to open the result in its parent application in preview mode.
Scott reviews the service request and determines that it is not the same issue that Bob is experiencing. continues to search for a solution.
39. Click **Return** at the top of the page.

40. Click the tabs for **Search Incidents** and **Search Problems**.

One problem contains the term **slow**, but it is not a match for this issue.

41. Close the **Search For Tickets** window.



Note: Search results are live, and details of the search hits can be viewed without opening the related application.

Scott is unable to find a quick solution to this issue, and must escalate this issue to a higher level of support.

Scott tells Bob that support will fix the issue as soon as possible, and gives him the service request ticket number for his reference.

42. Write the service request number that is shown in the upper left corner of the **Service Request** tab in your notes.

Categorizing and prioritizing

Before Scott escalates the issue, he must assign impact and urgency values to the issue.

43. From the navigation bar, click **Common Actions > Categorize and Prioritize**.

Bob's information, which is combined with Scott's own knowledge and experience, leads Scott to agree that the issue is high priority.

44. Enter a **2** for **impact** and a **1** for **urgency** in the appropriate fields.

45. Click **OK**.

Adding a work log entry

Scott must enter a short message that explains what was done so far. This information is important for the next level of support to know.

46. Create a work log entry with **Contacted requester** in the **Summary** field. In the **Details** field, type **I spoke with Bob on the phone. His notebook is running slowly when accessing the billing application. He has tried defragging his hard disk and rebooting.**

47. Scott determines that there is no need for Bob to be able to read this log, because it is a communication between Service Desk analysts. Leave the **Viewable** check box cleared.

48. Save the service request.

Creating an incident

Scott now must create an incident ticket so that higher levels of support can work on the issue. He creates it from inside the service request to create a relationship between the two tickets.

49. From the navigation bar, click **Common Actions > Create Incident**.
50. A short message indicates that an incident was created, and the Service Request changes status to **Queued**.

Viewing related records

51. To see the incident that was created, select the **Related Records** tab.

Scott can see the new incident, which has a status of Queued and a relationship to the service request of Followup.

Related Tickets			Filter	Search	Print	Up	Down	1 - 1 of 1	Print	Close
Related Record Key	Description		Class	Status	Relationship					
1001	Notebook computer running slowly		INCIDENT	QUEUED	FOLLOWUP					
Search For Tickets			Select Ticket			New Row				

This relationship is important for two reasons:

- It links all of the tickets together.
- When the status of the incident is changed, the status of the service request also changes.

52. Click the **Detail Menu** after the **Related Record Key** field of the new incident and select **Go To Incidents**.

Many fields were carried over from the service request.

53. Verify that the information from the Service Request was transferred to the new Incident. Check the contact information and internal priority.

54. From the navigation bar, click **Common Actions > Select Owner**.

The Select Owner window opens.

If Scott wanted to delegate the ticket to a specific person, the delegation could be performed here. However, Scott just wants to transfer the incident to anyone in the Incident group.

55. Open the **Person Groups** tab and select **Service Request Management Hardware Group (SRMHARD)**.

Note: If you do not see your selection on the first page, use the filter or the navigation arrows to see other choices.

Scott's name is removed from the **Owner** field, and **SRMHARD** is now in the **Owner Group** field. Also, the status of both the incident and the originating service request are set to Queued.

56. Click **Return** from the menu bar.

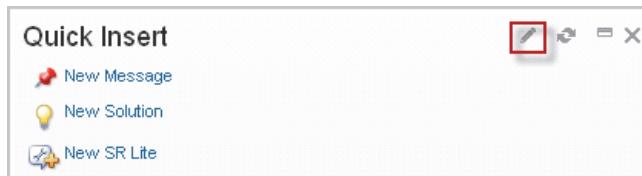
57. Return to the **Start Center**.

Exercise 8 Combining Quick Insert and ticket templates

Now, instead of looking at scenarios of the Service Desk, the following exercises look at a few individual features of IBM Control Desk. These features are designed to save time and make common tasks easier.

In previous exercises, you created a service request and then applied a ticket template to it. For cases where a particular type of record was frequently created, it is easier if both of these tasks were done at the same time.

1. When the cursor hovers over a portlet, more tools become available. Edit the **Quick Insert** portlet.



2. Click **Select Actions**.
3. Select the **New Service Request (SR)** action and click **OK**.

<input type="checkbox"/> New Requisition	CREATEDR
<input type="checkbox"/> New Service Request	CREATESR
<input checked="" type="checkbox"/> New Service Request	SR
<input type="checkbox"/> New Service Request	SRMSSCTR

A new action is created at the top of the list.

4. Change the description to **New Printer Issue SR**.
5. Enter **SDAPrinter** for the **Template ID**.
6. Click **Finished**.
7. Click **New Printer Issue SR** in the Quick Insert portlet. Notice how it creates a new service request with basic information completed.
8. Return to the Start Center. Do not save the new service request.

Exercise 9 Solutions application search

When you search for solutions by using the **Solutions** application, a rating is assigned to each match. Ranking is provided in the left margin by each solution. Self-service users can provide solution feedback as ranking and comments.

The ranking feedback indicates the number of stars the feedback receives:

- Five stars: Excellent
- Four stars: Very Good
- Three stars: Good
- Two stars: Fair
- One star: Average

This rating displays the quality of the match. Factors that are used for the ranking include the following items:

- Average rank
- Number of times viewed
- Number of times applied by Service Desk agents and by self-service users

To test the ranking system, imagine you have an issue with the billing system where the system starts running slowly and then gives you error 34. Look for any existing solutions to this issue.

1. Open the **Solutions** application.

You can click **Go To Applications > Service Desk > Solutions**, or use the **Solutions** link on the Start Center.

2. Type **billing** in the **Description** field and press Enter to display a list of all matching solutions.

The screenshot shows a search interface for the Solutions application. At the top, there are buttons for 'Advanced Search' and 'Save Query'. Below that is a search bar with the word 'billing' typed into it. The main area is a table with the following columns: Solution, Description, Status, Type, Self-Service Access?, and Author. There are two rows of results:

Solution	Description	Status	Type	Self-Service Access?	Author
TUSC1003	Billing System Access issue - Error 34	ACTIVE	APP	<input checked="" type="checkbox"/>	MAXADMIN
TUSC1002	Billing System Performance degradation	ACTIVE	APP	<input type="checkbox"/>	MAXADMIN

Notice that only one solution is ranked highly. The same solution is available to self-service users.

3. Which solution would you try first, and why?

Remain in the Solutions application to continue with the next exercise.

Exercise 10 Creating a stand-alone solution

In this exercise, you create a solution that is not tied to a ticket. This solution covers the way to remove the cover of a particular server. Typically, a solution like this applies to all servers, but this particular server has specific requirements.

1. If you have not already, start the Solutions application.
2. Click the **New Solution** icon.
3. Use the following information:
 - Description: **Server will not power up**
 - Include this solution in the Self Service Center?: **[Selected]**
 - Classification: **21010406 (Server Power/Battery issue)**
 - Asset: **ITAM4001**.
 - Keywords: **power, keywordtest, C2, security**
 - Symptom: **Server will not power up**
 - Cause: **C2 Security switch**
 - Resolution: **The access panel on this server is connected to a C2 security switch that does not allow the server to power up after it has been opened. To start the server after tripping the switch, use the maintenance key to reset the switch.**

Solution: 1001 Server will not power up Rate this solution

Status: DRAFT Include this solution in the Self Service Center?

% Effectiveness Score:

Solution Details Administrative Details Related Solutions User

Classification: 21 \ 2101 \ 210104 \ 21010406

Class Description: IT Issue \ Hardware \ Server \ Power / Battery

Asset: ITAM4001

Asset Description: IBM 8303 Server

Add keywords to improve the ai contain multiple words.

Keywords: c2, keywordtest, power, security

Attaching an image to the solution

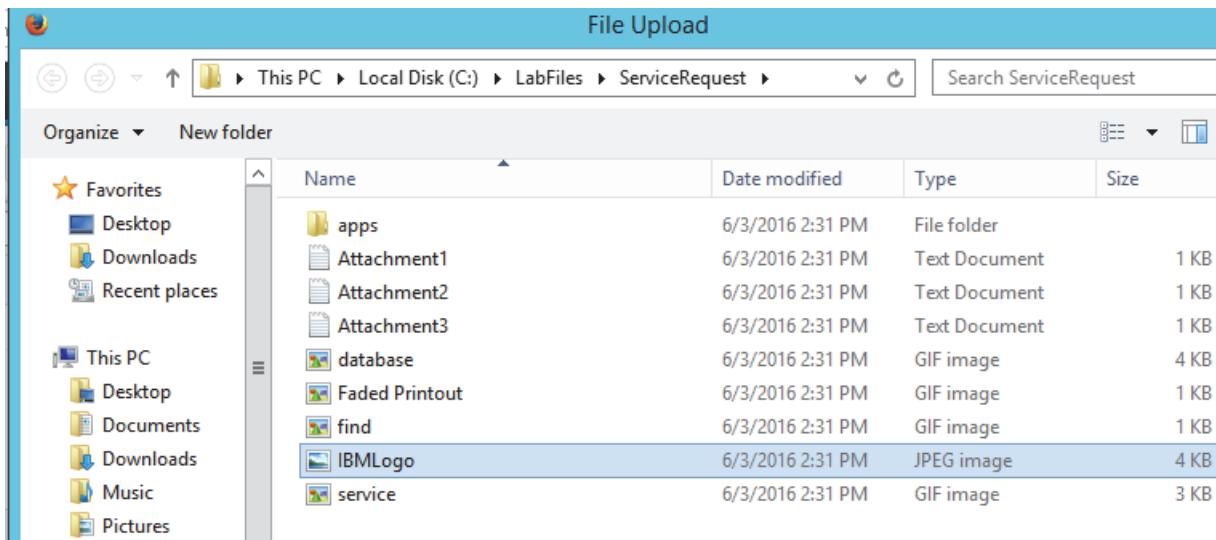
You can attach and display an image on the solution record. This feature is in addition to the existing attachment's functions.



Note: You can attach only a single image.

4. Click **More Actions > Add/Modify Image**.
5. Click **Browse** and select **C:\Labfiles\ServiceRequest\IBMLogo.jpg**.

In the production environment, your image might display something more specific to the situation, like a diagram that shows the switch location.



6. Click **OK**.

You can see the image that you attached at the top of the solution.

7. Save the solution if necessary.

Note: This solution is not available for use until it is marked Active by a knowledge administrator. Scott has the authority to create solutions, but does not have the authority to change the status. These roles can be configured to fit your environment.

8. Sign out.

Exercise 11 Keywords

Keywords can help users find solutions, but keywords exist separately from solutions.

When keywords are created inside solutions, they are added to the keyword index. From the keywords database, the list of keywords can be updated across all solutions.



Note: Keywords are not searchable by using the **Global Search** window. They can be found only by searching in the **Self Service Center** or **Self Service Global Search**.

Typically, the knowledge administrator approves stand-alone solutions. The knowledge administrator in this demonstration is **Nancy**.

Removing keywords

1. Sign in as Nancy with the user name **nancy** and the password **object00**.
2. Start the **Solutions** application by clicking the **Go To Applications** navigation bar and selecting **Service Desk > Solutions**.
3. Press Enter to view the list of solutions.
4. While viewing the list of solutions, click **More Actions > Add Delete Keywords**.
A list of all keywords that are used in all solutions is displayed.

The knowledge administrator is responsible for approving the keywords that are used in solutions. The department has a policy that all keywords must be at least 3 characters long, so the term **c2** must be deleted.

5. Click the **Mark row for delete** icon (trash can) beside the keyword **c2**.
6. Click **Yes** to confirm the deletion.
7. Click **OK**.
8. Find and open the solution that you created about the C2 security switch.
Notice that the keyword **c2** is no longer present.
9. On the navigation bar under **Common Actions**, click **Change Status**.
10. Set the new status to **Active** and click **OK**.

Searching the text fields

11. Start the **Global Search** application by clicking **Go To Applications** on the navigation bar and selecting **Service Desk > Global Search**.
 12. In the **Search Terms** field, type **power, security**, and press Enter.

Search Results		Filter						1 - 2 of 2	
		Solution	Description	Times Applied					
		SPOC1039	Security compliance Message AT2930	0					
		1001	Server will not power up	0					

Two solutions are shown.



Note: A cron task **PmObjSearchCron** is responsible for indexing the contents of solutions, and this cron task defaults to run once per day. In your lab environment, the time was shortened to every 5 minutes. If you do not see the expected results, wait a few minutes and try again.

13. Click to view the details for solution **SPOC1039**.

The solution was found because the search terms match the text fields.

- #### 14. Search for **keywordtest**.

Searching by using keywords

15. Start the **Self Service Global Search** application by clicking **Go To Applications** on the navigation bar and selecting **Self Service > Self Service Global Search**.
 16. In the **Find** field, type **keywordtest** and click the **Find** icon (magnifying glass).
 17. Click to view the details for the solution you created.
The solution matches the keyword that you entered.
 18. Repeat your previous search terms: **power** and **security**.
 19. Sign out.

You have reached the end of the exercises.

Inform your instructor that you have completed the exercises in this unit.

Unit 4 Service requests, incidents, and problems exercises

These exercises continue the handling of a complex issue.

Exercise 1 Handling a complex issue (Part 2, incident)

The hardware team receives the incident

Incident Analyst Nancy takes ownership of the incident Scott created: Bob's notebook is running slowly. She troubleshoots the issue, resolves the incident, and creates a problem ticket.

Remember that at the incident stage, the emphasis is on getting the user up and running rather than solving the root issue.

Opening the incident

1. Sign in as Nancy with user name **nancy** and password **object00**.
2. Click the **Incident Analyst** tab.

Nancy notices that there is a new high-priority incident in her group work view. Notice that the incident is displayed in the group work view of everyone that belongs to the SRMHARD group.

3. Open the incident by clicking the Incident number, and take ownership.



Note: Because Nancy takes ownership of the incident, it no longer is displayed in anyone else's work view. Nancy must take ownership as soon as she decides to work on a ticket so that no other SRMHARD group member tries to work on it.

4. Change the status of this incident to **In Progress**.

Working with an incident

Gathering background information

Nancy looks over the incident to learn the details of the issue and to determine what was done so far.

Look at all the fields of the incident, paying particular attention to the **Details** field.

5. Review the **Work Log** and **Communication Log** sections and see whether there are any entries.

It looks like some basic troubleshooting was done.

6. Click the **Related Records** tab and look at the service request. You must go to the **Service Requests** application by clicking **Detail Menu**.

7. Look at the service request to pick up any information that was not on the incident.

8. Click **Return**.

Because this notebook problem affects only one user, Nancy does not mark this ticket as a global issue.

9. Go to the **Incident** tab and verify that the **Global Issue** icon is not active. Hovering the mouse cursor over the icon creates a pop-up window.

10. Save the incident if necessary.

From looking at the service request and incident, it seems that the Service Desk agent already performed basic troubleshooting. Nancy must get the user back to work by using a workaround.

She talks to Bob and tries to find a workaround for the problem.

Resolving the incident

Providing the requester with a workaround

Nancy contacts Bob on the telephone and verifies with him that the notebook still has slow performance. Nancy guides Bob through some more diagnostic steps and discovers that the notebook performs slowly only when using the billing application. Other applications work fine, but Bob had only used billing today. Also, Bob is using a backup server instead of the main billing server.

Nancy asks Bob to configure his connection to use the main server. After the change in configuration, everything is working properly again. Nancy asks if he is satisfied that the issue is resolved. Bob confirms that it is.

Although Bob's incident is resolved, Nancy decides to open a problem ticket to fix the backup server. Nancy creates a problem ticket to troubleshoot the server, and marks the incident as Resolved.

Sending a communication

Even though Nancy talked to Bob on the phone, company policy states that when an incident is resolved, a communication must be sent.

11. Click the **Send Email** icon at the end of the **Reported By** field on the Incident tab.

The **Create Communication** application starts.

12. Open the **Template Selection** screen by clicking the **Detail Menu** icon at the end of the **Template** field and clicking **Select Value**.

The list of templates is displayed.

INCRESRB - Incident resolved (to requester) might apply to the situation.

13. Select the **INCRESRB** template.

14. Send the email message by clicking **Send**.

15. Confirm that the email is added to the communication log of the ticket by reviewing the **Communication Log** section.

Adding a work log entry

Nancy creates a work log entry to describe what she found and did.

16. Create a work log entry and enter the following information.

- Type: **WORK**
- Summary: **Changed billing server**
- Details: **Bob's notebook is now using the primary billing server.**

17. Save the incident record.

Creating a problem ticket

Nancy now must create a problem ticket to fix the backup server. She creates it from inside the incident record to create a relationship between the two tickets.

18. From the **More Actions** menu, click **Create > Problem**.

A message at the top of the screen indicates that a problem was created.

Viewing related records

19. To see the problem that was created, click the **Related Records** tab.

Nancy can see the new problem, which has a status of **QUEUED** and a relationship to the incident of **FOLLOWUP**.

20. Click the **Detail Menu** button after the **Related Record** field of the new problem and select **Go To Problems**.

The Problems application opens.

Many fields were carried over from the incident to the problem.

Nancy thinks about what priority to assign. Bob's connection is working now, so the urgency is lower than the 1 assigned to the incident. However, the backup server needs to be fixed in case the primary server goes down.

21. Remove Bob's name from the **Affected Person** field.

22. In the **Priority** fields, enter a **3** for **Impact** and a **2** for **Urgency**.

23. What priority was automatically inserted into the **Internal Priority** field?

24. Change the summary to **Billing server slow performance**.

25. Change the details to **The backup billing server is performing slowly. The primary server is ok.**

26. On the **Asset** field, click the **Detail Menu** icon, and then **Select Value**.

27. Change the asset to **ITAM4001**. The description should show up as **IBM 8303 Server**.



Note: The assets are filtered by User/Custodian. You need to remove this filter to see the correct server. Change the filter to **All** and click **Refresh**.

A system message asks if you would like to update the location.

28. Click **Yes**.

29. Change the classification to **210104 IT Issue \ Hardware \ Server**. Remember that you can filter the description for **server**.

30. Save the problem.

Nancy could assign this new problem to the appropriate group for the next available person to handle, but she already knows the situation and decides to keep ownership of this issue.

31. Click **Return** from the menu bar.

Because the incident is resolved, Nancy must close the ticket.

32. Set the status of the incident to Resolved by using the **Resolve Incident** action, and clicking **OK** in the Change Status dialog.

Notice that the status of the originating Service Request is automatically changed to **RESOLVED**, but the Problem remains **QUEUED**.

Nancy's work with the incident is finished.

33. Return to the Start Center.

Exercise 2 Automated solution handling

When working with a customer on a ticket, an agent might not find an existing solution to the issue.

After the issue is resolved, the agent will complete the fields of the **Solution** tab, stating what was done to resolve the problem. This type of solution is known as an **ad hoc solution**.

IBM Control Desk automates the processing of these ad hoc solutions into the formal solution base as new draft solutions. When these solutions are in the formal solution base, the knowledge administrator can review all the new draft solutions and make the relevant ones active.

1. Logged in as Nancy, start the Incidents application by clicking the **Go To Applications** navigation bar and selecting **Service Desk > Incidents**.
2. Click the **New Incident** icon.
3. Give the incident a summary of **ad hoc solution test**.
4. Click **Submit Now**.
5. Go to the **Solution Details** page by clicking the **Solution Details** tab.
6. Do not type anything into the **Solution** field. It is automatically completed later.
7. In the **Symptom** field, type **ad hoc symptom**.
8. In the **Cause** field, type **ad hoc cause**.
9. In the **Resolution** field, type **ad hoc resolution**.
10. Save the incident.

Currently, the solution information is only used inside this single incident.

By default, IBM Control Desk performs these tasks once per day:

- Detects the ad hoc solution that you created earlier
- Creates a solution record with a system-generated ID number and in a Draft status
- Copies over the fields from the incident ticket **Solution Details** tab
- Copies the new solution ID number to the incident ticket **Solution Details** tab

IBM Control Desk performs the last task so that the next time the process is run, it does not try to redo this process on the ad hoc solution. Therefore, instead, the ad hoc solution has an ID number and is a stand-alone solution. In your classroom environment, these tasks are run every 5 minutes.

Verifying that the ad hoc solution was processed

11. Wait a few minutes and click the **List View** tab. Reopen the ticket that is created in the first part of this exercise. Hint: summary = **Ad hoc solution test**.

12. Click the **Solution Details** tab and note the following details:

- The **Solution** field is populated with the formal solution number. The next time that the cron task runs, it will not attempt to process this solution again.
- The **Details** field is populated with the **Details** field from the incident ticket.

Incident:

1004	Ad hoc solution test	
------	----------------------	--

Solution:

A92	» Ad hoc solution test	
-----	------------------------	--

Solution Status:

--	--	--

If you do not see a solution number, wait a few minutes more. If you still do not see it, return to the **Start Center**, reopen the **Incidents** application, and try again.

13. View the formal solution by clicking the **Detail Menu** icon after the **Solution** field and selecting **Go To Solutions**.

You can see the newly created solution record. Notice that the status is Draft.

Solution:

A92	Ad hoc solution test
-----	----------------------

Status:

DRAFT

Knowledge administrators review these draft solutions and activate the ones that should be available in the knowledge base.

14. Click **Return** to return to the Incidents application.

15. Return to the **Start Center**.

Exercise 3 Searching external knowledge management systems

In IBM Control Desk, when a global search is initiated, you can search multiple external knowledge management tools on websites in addition to the IBM Control Desk database. The user is spared the effort of going to multiple tools and searches.

You can configure external sites for your environment, for example:

- IBM TechDev
- Yahoo
- Google
- Bing

A new browser window opens for each external knowledge management tool result.



Note: This process might not show working sites, depending on whether you have an Internet connection. By default, your virtual machine is not configured for Internet access. Also, you can configure the sites that are opened on an external search.

1. While still logged in as Nancy, open the **Global Search** application by selecting **Service Desk > Global Search** from the navigation bar at the left..
2. Add the term **print** to the **Search Terms** field.
3. Click the **Search External Knowledge Base** tab.

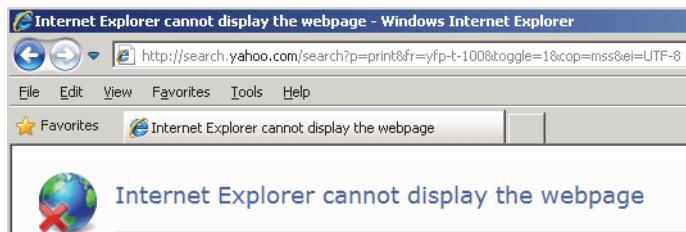
The screenshot shows the Global Search interface with the 'Search External Knowledge Base' tab selected. The 'Search Terms' field contains 'print'. The 'Available External Knowledge Bases' table lists four entries: IBM, Google, Bing, and Yahoo, each with a checked checkbox next to it. The table includes columns for Description and a checkbox column.

Description	checkbox
IBM	<input checked="" type="checkbox"/>
Google	<input checked="" type="checkbox"/>
Bing	<input checked="" type="checkbox"/>
Yahoo	<input checked="" type="checkbox"/>

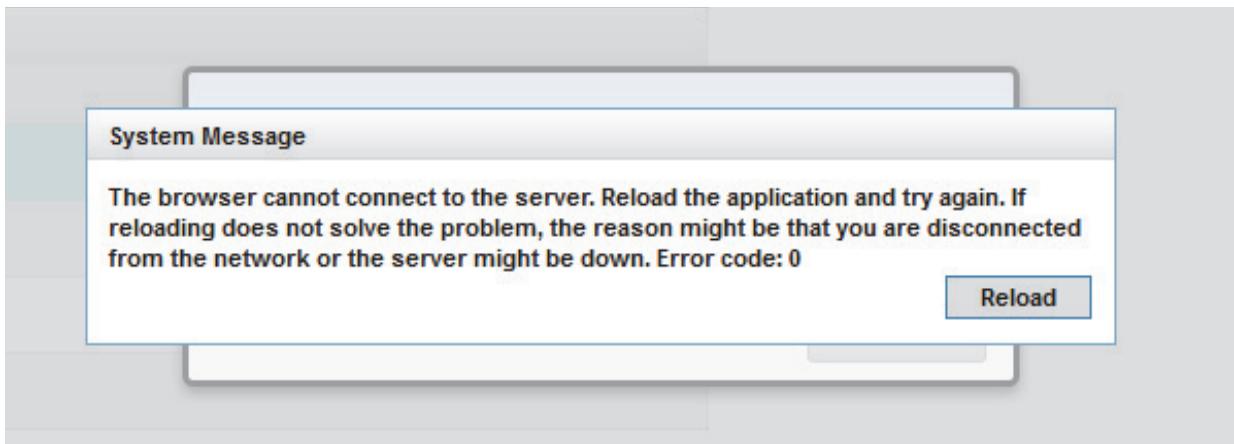
4. Select all of the available knowledge bases, and click **Search**.



Note: Depending on the browser you choose to use, the screen that is displayed varies. In the first example, Internet Explorer displays the Internet Explorer cannot display the webpage message. Mozilla Firefox behaves in a different manner. Initially, you might receive an error that indicates an SQL error, followed shortly by the second message shown, which indicates an inability to connect.



Notice that a browser is opened to search each external site.



5. Close the new browser windows.
6. Return to the **Start Center**.

Exercise 4 Handling a complex issue (Part 3, problem)

Problem analysts receive the problem ticket

As an incident analyst, Nancy was responsible for finding a quick workaround for the incident that Scott created for Bob. Now that the workaround is in place, Nancy is also going to work the problem ticket for a permanent solution as a problem analyst.

Opening the problem

1. If you are logged out, sign in as **Nancy** with the user name **nancy** and the password **object00**.
2. Click the **Incident Analyst** tab on Nancy's Start Center.

Nancy finds some time to work on the new problem ticket and finds it in the Known Problems portlet. The description is **Billing server slow performance**.

Known Problems			
Ticket ID	Description	Creation Date	Status
PM1007	Network slow	3/17/11 11:14:20	INPROG
1003	Billing server slow performance	6/4/13 17:57:29	QUEUED
Set Graph Options		1 - 2 of 2	

Because Nancy became the problem owner when she created it, she does not have to take ownership.

3. Open the problem by clicking the problem number.
4. Change the status of this problem to **In Progress**.

Working with a problem

Gathering background information

Nancy was working on other higher priority issues recently and decides to review the ticket details to refresh her memory.

5. Read the details and log entries that are associated with the problem ticket.

From the details in the incident ticket, Nancy knows to check the backup billing server. She runs some diagnostic tests, checks the log files, and examines the running applications. When she is finished, she determines that the Java virtual machine is out of date and must be upgraded.

Nancy creates an activity to define what work to do, which asset requires the update, and who is to perform the work.



Note: In a corporate production environment, Nancy would complete a change request and get approval before performing any work. For this lab exercise, assume that the change process was completed. A lab on Change Management is available if you would like more information.

Creating the activity

Nancy adds an activity to upgrade the Java software on the server.

6. Access the **Activities** tab and add a new row to the **Activities** table.



A new activity record is created by using information from the problem as its basis.

The screenshot shows a table titled "Activities" with one row. The columns are "Sequence" (with value 1156), "Activity" (with value "Billing server slow performance"), and "Summary". Below the table, there is a section titled "Activity Information" containing fields for "Activity" (1156), "Location" (SOUTHERN), "Asset" (ITAM4001), and "Description" (Billing server slow performance).

7. Write the activity number in your notes.

Nancy notices that the description that was copied over from the problem does not match what needs to be done.

8. Change the **Summary** of the activity to **Upgrade Java**.
9. Click **Activity Processing** at the bottom of the **Activity** section and click **Select Owner**.



10. Use the filter on the **Person** field to search for Nancy.



Note: The search results display multiple entries because Nancy is a member of many person groups, but they all refer to the same person. You can filter by group, person, or a combination of the two.

11. In the **Select Owner** window, select any one of the records for **Nancy** in the person column.

Persons		
Person Group	Person	Name
	nancy	
PMCHGANA	NANCY	Nancy Incident Analyst
PMSCOS	NANCY	Nancy Incident Analyst
SRMAPPL	NANCY	Nancy Incident Analyst
SRMDESK	NANCY	Nancy Incident Analyst
SRMEMAIL	NANCY	Nancy Incident Analyst
SRMHARD	NANCY	Nancy Incident Analyst
SRMNET	NANCY	Nancy Incident Analyst

12. Click **OK** to close the system message window.

The activity status currently is WAPPR (Waiting on Approval). Nancy must approve the activity before any work can be done.

13. Click **Activity Processing** and select **Change Status**.

14. Select **Approved** and click **OK**.

15. Click **OK** to close the system message.

The problem ticket is now waiting on the Java upgrade.

16. Change the problem status to **Pending**.

Exercise 5 Performing the work

Nancy must log on to the server, upgrade the Java software, and close the activity.

1. Change the activity status to **In Progress** by clicking **Activity Processing > Change Status**.
2. Close the system message.

Performing the work and close the activity

Nancy logs on to the server. She shuts down the Java services, installs the updated software, checks the new version number, and restarts the services.

She ensures that the billing application is working properly and then logs out. Now it is time to finish the paperwork.

3. Create a work log entry that details the Java update by clicking the **Detail Menu** icon after the **Activity** field, selecting **Go To Activities and Tasks**, and clicking the **Log** tab.

	<u>Sequence</u>	<u>Activity</u>	<u>Summary</u>
	1156	➡ Upgrade Java	Activity Information

4. Click **New Row** to create a work entry.
Use your own words to describe the Java update.
5. Save the activity.
6. Return to the problem.
7. Change the status of the activity to **Completed**.
8. Click **OK** to close the system message.

Note: If you are unable to find **Completed** you may be looking at the Problem, rather than the activity. To change the status of the Activity, click **Activity Processing**, then select **Change Status**. **Completed** is one of the options from the drop down menu.

Exercise 6 Closing the problem

Entering the solution information for this problem

Nancy enters details about how this issue was solved.

Follow these steps to create a solution for this specific problem:

1. Click the **Solution Details** tab.
2. Enter the following information.

Field	Value
Solution	[Leave this field blank. This information is entered automatically if you use an existing applicable solution.]
Symptom	Backup billing server running slowly
Cause	Java software was back-level
Resolution	Updated Java

3. Now that the problem has a solution, you can mark it as a known error. On the **Problem** tab, select the **Is Known Error** check box.

Target Description: _____

Is Known Error?

Customer: _____ > _____

4. Change the status of the problem to **Resolved**.
5. Sign out.

Exercise 7 Using known errors to narrow down solutions

Setting a problem to Known Error can be helpful. To see how, you act as a Service Desk agent who works an issue that was reported: Oracle Financials Issues.

1. Sign in as **Scott** with the user name **scott** and the password **object00**.
2. Start the Service Requests application by clicking the Go To Applications navigation bar and selecting **Service Desk > Service Requests**.
3. Click **New Service Request**.
4. Click **Submit Now**.
5. Set the classification to **210701 (Oracle Financials Issue)**.

You can view similar tickets to see whether any others deal with similar issues.



6. Click **Common Actions > Search For Tickets**.
7. Beside the **Classification** field, click the **Copy from ticket** icon.
8. Click **Search**.
9. Click each of the tabs for **Incidents**, **Service Requests**, and **Problems**.

You see many tickets from each category. A typical service desk, after a few months, can have thousands of tickets. These tickets can take a while to go through, and most of them record only the issue, not what was done to correct it.

Looking through similar tickets can help a Service Desk agent find solutions.

10. While on the **Search Problems** tab, select the **Only show active known errors** option, and click **Search**.

Now only the problems that contain a verified error (and probably the solution) are shown.

11. Select the ticket by selecting the check box at the left, and click **Relate Selected Tickets**.

Search Results						
	Known Error?	Problem	Description	Status	Status Changed	In Attachment
<input checked="" type="checkbox"/>		TUSC1013	Oracle system appears to be down -website error 404	PENDING	12/16/11 13:28:06	<input type="button" value="Relate Selected Tickets"/>

12. Click **Close**, then click the **Related Records** tab.

Notice that the Problem record and the corresponding Solution are now related to the current record.

13. Sign out.

You have reached the end of the exercises. Inform your instructor that you have completed the exercises in this unit.

Unit 5 The Service Catalog exercises

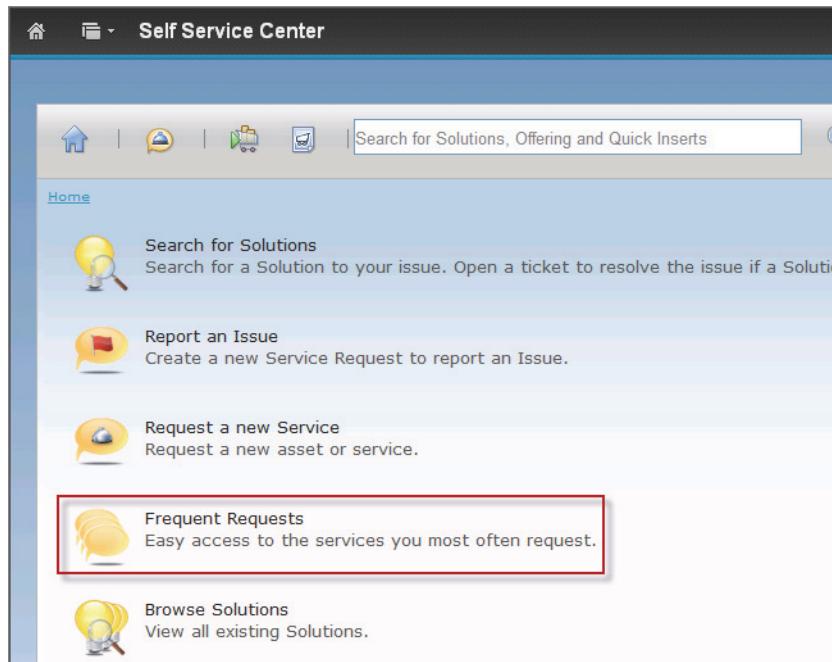
In these exercises, you follow an offering from ordering to fulfillment.

- As a self-service user (**Bob**), you purchase an offering.
- As a line manager (**Fred**), you approve the request.
- As an operations specialist (**Nancy**), you fulfill the request.

Exercise 1 Ordering an offering

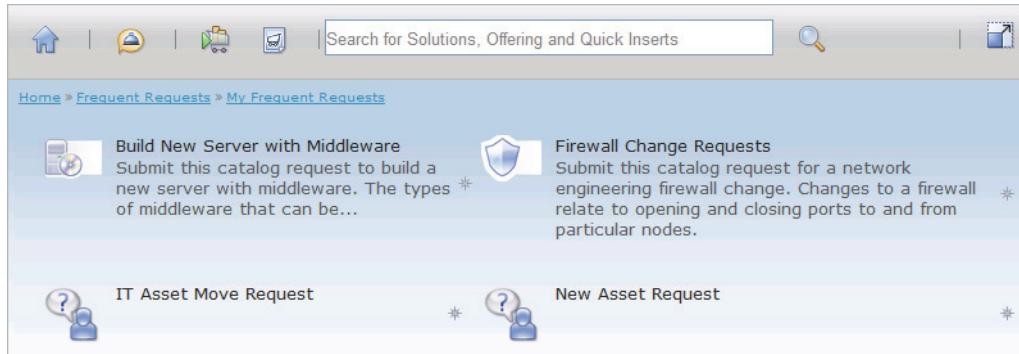
In this exercise, you look for services in both the Self Service Center and the Service Catalog.

1. Sign in as **Bob** with the user name **bob** and the password **object00**.
2. Click **Frequent Requests** from the **Self Service Center**.

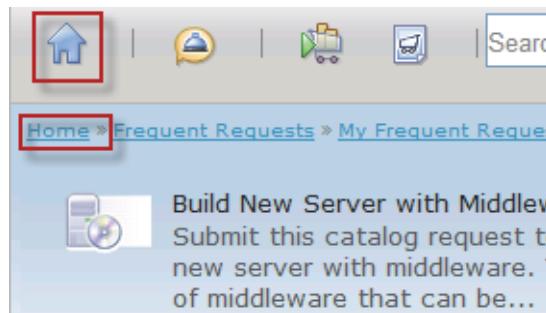


Notice the choices that are listed here. There are options for system-wide frequent requests, and Bob's personal most frequent requests.

3. Click **My Frequent Requests** to see what Bob uses most frequently.



4. Go back to the Self Service Center home page by clicking either the **Home** icon or the word **Home** in the breadcrumbs.



5. Click **Report an Issue**, **IT Issue**, and **Network Connectivity**.

The **Report an Issue** window opens.

6. Add this offering to Bob's favorites list by clicking **Add to Favorites**.

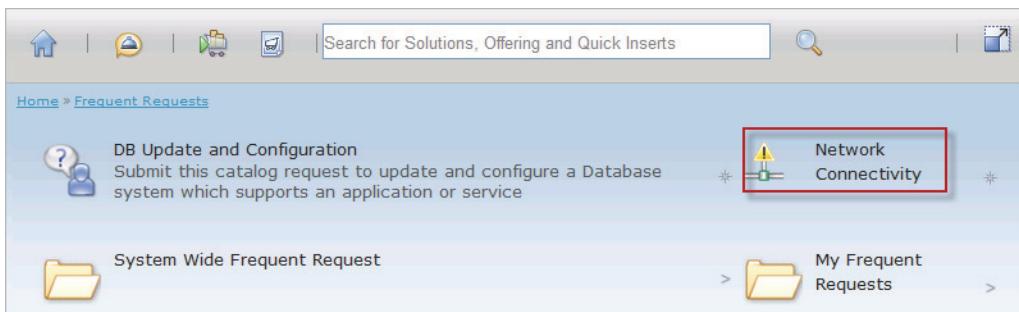
7. Click **OK** on the system message window.

Notice that **Add to Favorites** changed to **Delete from Favorites**.

8. Click **Cancel** on the **Report an Issue** window.

9. Click the Self Service Center **Home** icon.

10. Click **Frequent Requests**.



Notice that the **Network Connectivity** choice was added to the **Frequent Requests** list.

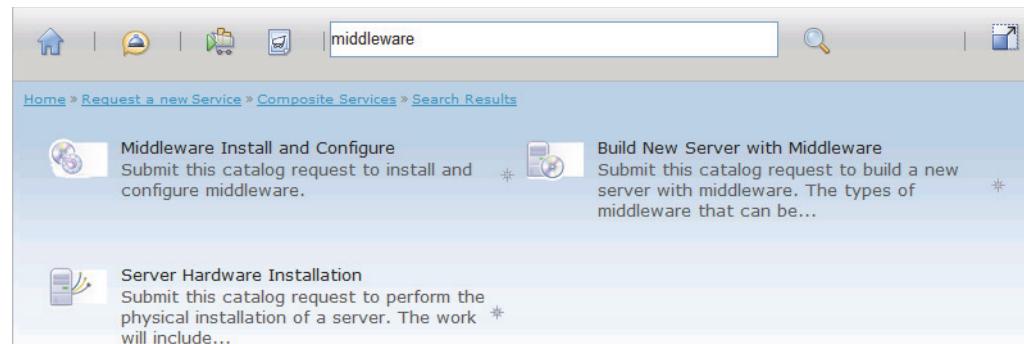
11. Click the Self Service Center **Home** icon.

12. Click **Request a new Service**.

There are many categories and offerings available here. Bob has several options for choosing what he is looking for.

13. Click **Composite Services**.

14. One of the offerings that Bob is interested in is **Build New Server with Middleware**. Instead of clicking it, search for **middleware** in the search bar.

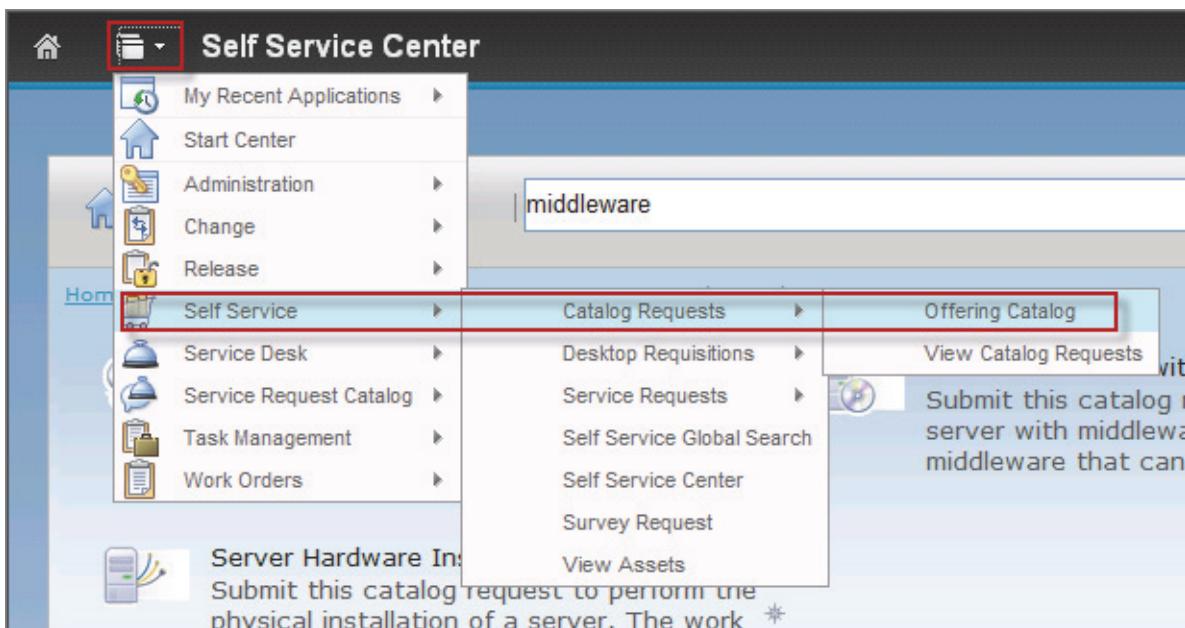


If you know what you are looking for, the search bar can bring results quickly without requiring navigation of categories.

Browsing the catalog

Sometimes Bob likes to look through the Self Service Center. Sometimes he prefers to search for the offering that he is looking for. But sometimes he wants to use the full Service Catalog interface.

15. Click the **Go To** icon > **Self Service** > **Catalog Requests** > **Offering Catalog**.



16. In the **Browse by Catalog** navigation bar, click **IT Services** > **Composite Services**.

Clicking **Composite Services** presents you with the same choices that you found in the Self Service Center.

The screenshot shows a web-based service catalog interface titled "Find What You Need". On the left, there's a sidebar titled "Browse by Catalog" with a tree view. The tree starts with "End User Services", which has "IT Asset Management Catalog" as a child. Under "IT Services", there are several collapsed categories: "Composite Services", "Data Network Services", "Distributed Client Services", "Enterprise Security Management", "Fixed Cost Service Requests", "Server Systems Management", and "SmartCloud Control Desk Demo". To the right of the sidebar, there are search fields for "Search:" and "Catalog:". Below these, under the heading "Offerings", there are two main sections: "Offering UI Display" and "Build New Server". The "Offering UI Display" section contains a link to "Build New Server" with a server icon. The "Build New Server" section contains a link to "Submit this catalog request to build a new server".

17. Click **View All Offerings** in the search bar.

18. Scroll down and view all the offerings that come with Service Catalog.

The screenshot shows a list of catalog requests under the heading "Offerings". At the top right, there are navigation links: "Previous", "1 - 20 of 31", and "Next". The list includes three items: 1. "Offering UI Display" with a link to "Add Database To Server" and a database icon. Description: "Submit this catalog request to add a database to a server.". 2. "Build New Server" with a link and a server icon. Description: "Submit this catalog request to build a new server.". 3. "Build New Server with Middleware" with a link and a server icon. Description: "Submit this catalog request to build a new server with middleware. The types of middleware that can be created comprises a Database Management System (DBMS), a Message Queuing (MQ) System ...".

Ordering from the catalog

Bob is now ready to place his order to build a new server with middleware.

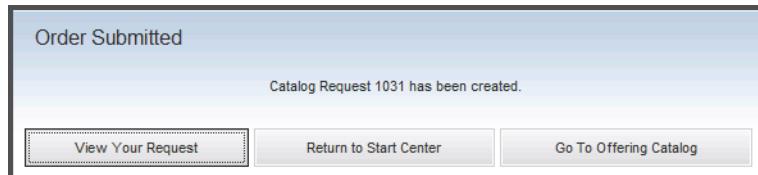
19. Use any method that you like to find and select the offering **Build New Server with Middleware**.

20. Enter the following information for the new server:

Field	Value
Host Name	BOB-SRV1
IP address	10.10.10.10
Operating System	PMSC_WINXP1

Field	Value
Network Zone	corporate
Expected Release Date	{one week from today}
User IDs	none
Project Name	Project Demo

21. Click **Continue**.
22. Select the **Install DB** option.
23. Click **Continue**.
24. In the **Summary** section, click **Submit Request**.
A window opens.
25. Make a note of the newly created request number.



26. Click **View Your Request**.
On this page, you can review the status, details, and history of the catalog request.
27. Sign out.

Exercise 2 The fulfillment process

There are two steps in the fulfillment process:

- **Approval:** The request is approved or denied.
- **Fulfillment:** If approved, the order is fulfilled.

Approval

Line manager approval

The first step in the approval process is for the cart submitter's supervisor to approve or deny the request. In this example, Bob's supervisor is Fred.

1. Log in as **Fred** with the user name **fred** and the password **object00**.

A new **Inbox** assignment requires manager approval.

Description	DUE DATE	Route
Manager Approval from BOB for 'Firewall Change Requests'	2/19/12 12:52:43	[Route icon]
Manager Approval from BOB for 'Request PC'	8/10/11 13:31:41	[Route icon]
Manager Approval for New Asset Request	5/11/12 20:28:32	[Route icon]
Manager Approval for New Asset Request	5/15/13 15:14:57	[Route icon]
Manager Approval from BOB for 'Build New Server with Middleware'	6/10/13 16:32:22	[Route icon]

2. Start the workflow by clicking the **Route** icon beside the assignment.

The service request that contains the order open and a **Complete Workflow Assignment** window opens.



Complete Workflow Assignment

Task:

Manager Approval from BOB for 'Build New Server with Middl

Action:

Accept

Reject

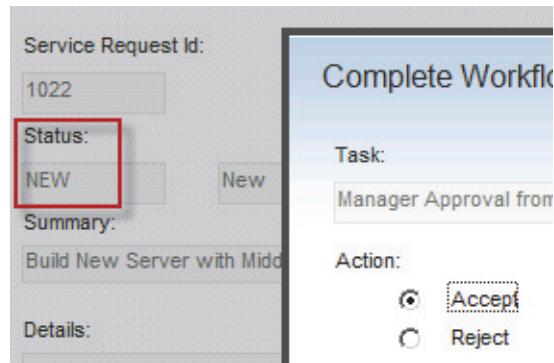
Memo:

Earlier Memos Filter > ... 0 - 0 of 0

Memo	Person	Transaction Date
...No rows to display...		

OK Reassign Cancel

Note at the top of your screen that the service request status is **New**.



- Leave **Accept** selected and click **OK**.

The window closes, leaving the service request open. Notice that the service request has a status of Queued.

- Sign out.

Fulfillment

When approval occurred, work orders were created from the job plan in the service request.

- Sign in as Nancy with the user name **nancy** and the password **object00**.
- Click the **Operations Specialist** tab.
- Find and select the service request in the **Group SR Queue**.

Group SR Queue		
Service Request	Summary	Internal Priority
1022	Build New Server with Middleware	QUEUED
Set Graph Options		

- Take ownership of the service request.
- Click the **Activities** tab.
- Select the **Detail Menu** icon of the **Activity** field and select **Go To Activities and Tasks**.

Activities		
Sequence	Activity	Summary
10	1157	Build New Server with Middleware v2

- Click the **Plans** tab.

Here you can see the various tasks that are created to fulfill the request that is made by the user.

Tasks for Activity 1157				
Sequence	Task	Summary	Estimated Duration	
▶ 10	10	Install OS & Standard Applications	1:00	
▶ 20	20	Configure SAN LUNs	1:00	
▶ 30	30	Install & Configure Database	1:00	
▶ 40	40	Install & Configure WAS	1:00	
▶ 50	50	Create Change Record for Server Deploy	0:15	
▶ 60	60	Deploy Server	0:15	

12. Click **Return** at the top of the screen.

13. Sign out.

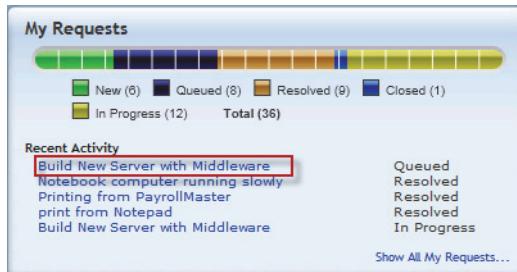
Typically, the work would be done and the request would be fulfilled.

However, fulfillment does not always occur immediately. In the following exercise, you learn how users can see the progress of their requests.

Exercise 3 Checking the progress of a request

1. Sign in as **Bob** with the user name **bob** and the password **object00**.

On the **Self Service Center**, Bob can see the status of his request.



2. Click the service request to see the details.

The figure is a screenshot of the 'View Service Request' dialog. At the top, there's a navigation bar with tabs: New, Approved, Queued (highlighted in green), In Progress, Pending, Resolved, and Closed. Below the tabs, there are three input fields: 'Service Request:' (1022), 'Summary:' (Build New Server with Middleware), and 'Status:' (Queued). Underneath these fields, there's an 'Owner:' field with 'NANCY' and an information icon. Below the main fields, there are several data entry fields grouped into pairs: 'Creation Date:' (6/10/13 18:27:32), 'Reported By:' (BOB), 'Affected User:' (BOB); 'Target Start:' (empty), 'Target Finish:' (empty); 'Changed Date:' (6/10/13 19:12:34), 'Changed By:' (NANCY). At the bottom right, there are three buttons: 'OK', 'Cancel', and 'Show Offering dialog'.

If you want to communicate any information to the people who fulfill your request, you can create a service request log entry.

3. Click the **Log** tab.
4. Click **Add Log Entry**.
5. For the summary, enter **Need more RAM**.

6. For the details, enter **I need to install another application that requires 16 GB of extra RAM.**

The screenshot shows a service request detail view. At the top, there are navigation buttons for 'Work Log', 'Filter', search, and sorting. Below this is a table with three columns: 'Created By' (BOB), 'Date' (6/10/13 19:25:40), and 'Summary' (Need more RAM). Under 'Summary', there is a text input field containing 'Need more RAM'. Below the summary is a rich text editor toolbar with buttons for font, size, and format. In the main content area, there is a text box containing the note: 'I need to install an additional application that requires 16GB of additional RAM.'

The note is added to the service request and is handled by the fulfillment team.

7. Click **OK** on the View Service Request window.
8. Sign out.

You have reached the end of the exercises. Inform your instructor that you have completed the exercises in this unit.

Unit 6 Self-service exercises

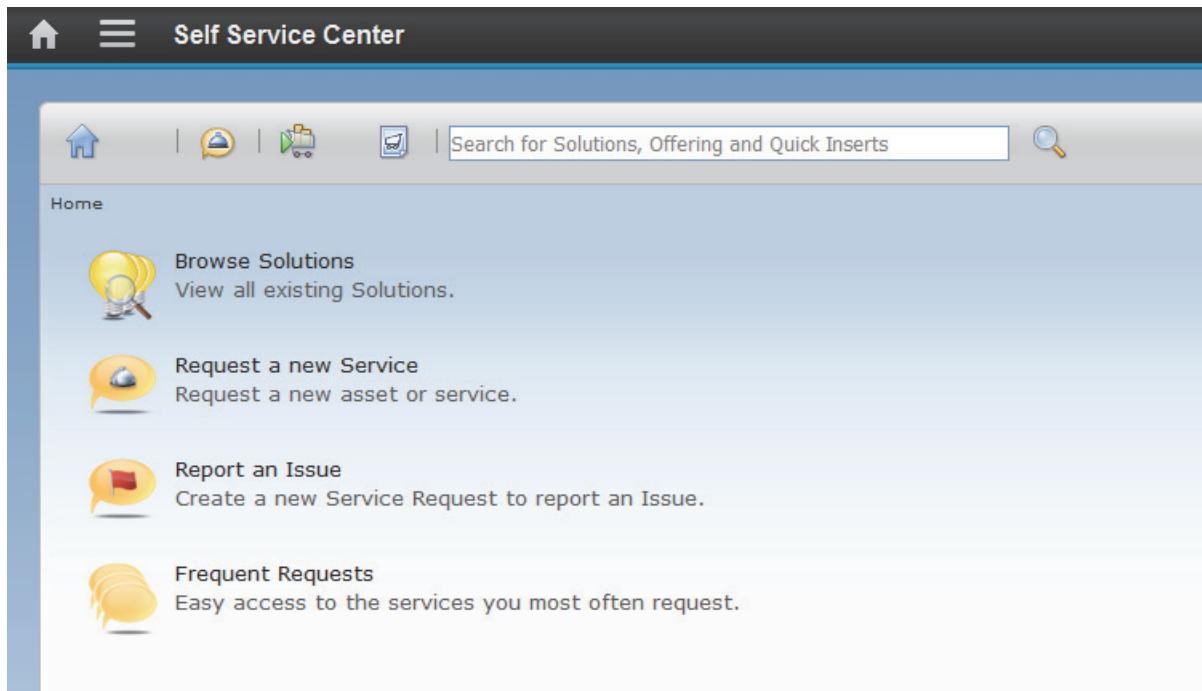
The exercises for this unit introduce you to the Self Service Center and show you how a typical user searches solutions, checks status, and orders services with it. You also use the email interface to request a service.

Exercise 1 Finding solutions with the self-service tools

Bob cannot log in to Oracle Financials. He is getting Error 404. Before he calls the Service Desk, Bob attempts to find the answer himself using the self-service tools.

Searching for solutions

1. Log in as **Bob** with the user name **bob** and the password **object00**.



2. Enter oracle 404 in the search bar and press **Enter**.

3. Click the first entry to view it.

Bob reads the solution and tries it, and it works.

The next step is to rate the solution.

Rating a solution

4. In the **User Feedback** tab, select the **Rank the Solution** button, select **Excellent**.
5. In the comments field, type **This worked perfectly the first time!**



6. Submit your rating and comments by clicking **OK**.
7. Click **Yes** to answer the **Did this solution help you resolve your issue?** question at the bottom of the page.

Did this solution help you resolve your issue? Yes No - Create a Service Request No - Return to Solution Search

Notice that a resolved service request was created and it has the same summary as the applied solution. This record is the one that Bob used from the Service Desk to resolve his issue, and it is in the **My Requests** portlet.



Exercise 2 Creating a service request by using self-service

Bob just got a new personal smartphone, and he needs help configuring it for use on the corporate network. Rather than call the service desk immediately, he searches for the answer himself using the Self Service Center.

Searching for a solution

1. If you are not at the Self Service Center, return to it by clicking the Go To Applications navigation bar and selecting **Self Service > Self Service Center**.
2. Enter the terms **phone corporate network** in the search field and see if any FAQs match Bob's issue.
3. Press Enter to show the results in the main interface.

Creating a service request

There are several matches, and two of them look promising. Bob can choose between **Network Connectivity** or **Phone Not Working**.

4. Click **Network Connectivity**.

The screenshot shows a search results page for 'phone corporate network'. The results are as follows:

- Corporate network account password reset: User cannot gain access to the network due to an invalid password.
- How to request a corporate application account: Require access to a corporate application e.g. CCMDB, CRM, Oracle Financials, TAMIT, TSRM.
- Phone Not Working: I and S Network Consulting. Submit this catalog request for network consulting services. Network consulting services are required...
- Network Connectivity**: This item is highlighted with a red box. Description: Submit this catalog request for a network engineering firewall change. Changes to a firewall relate to opening and closing ports to and from particular nodes.
- Network Slow Response at Southern Sites: Intermittent slow response on all application at Southern locations.
- Firewall Change Requests: Submit this catalog request for a network engineering firewall change. Changes to a firewall relate to opening and closing ports to and from particular nodes.
- Server Hardware Installation: Submit this catalog request to perform the physical installation of a server. The work will include...
- Lotus Notes - Change User Name or Certifier: Submit this catalog request to change a Lotus Notes user name or certifier. Lotus Notes IDs have

5. Complete the details of the service request as you think Bob might enter them, for example:
 - Details: **My new smartphone can not access the corporate network. I cannot connect to the access point.**
 - Priority: **2**
 - Was the access denied? **Yes**
 - Error Message if any? **Contact your administrator**
 - What type of network access? **Intranet**
 - How are you accessing the network? **Wireless**

Report an Issue

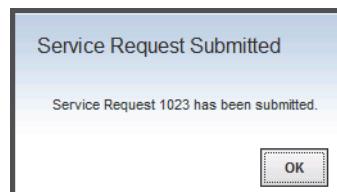
Tell me the description and details of your problem, and submit the new record. If the 'Attachments' tab is displayed, you can attach logs or additional files or take a screen capture of your desktop and attach that along with your submission.

Describe the Issue	Attachments						
<p>* Summary: Network Connectivity</p> <p>Details:  My new smart phone will not access the corporate network. I cannot connect to the access point. </p>							
<p>Reported For: BOB</p> <p>Ticket Type: IT Issue \ Networks \ Connection</p> <p>Affected Asset:</p>	<p>Priority: 2</p> <p>Phone: 713-297-7900</p> <p>E-mail: bob@tivoli.edu</p>						
<p>Attributes Filter >    1 - 4 of 4 </p> <table border="1"> <thead> <tr> <th>Description</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>Was the access denied?</td> <td>YES</td> </tr> <tr> <td>Error Message if any?</td> <td>Contact your administrator</td> </tr> </tbody> </table>		Description	Value	Was the access denied?	YES	Error Message if any?	Contact your administrator
Description	Value						
Was the access denied?	YES						
Error Message if any?	Contact your administrator						
<p><input type="button" value="Delete from Favorites"/> <input type="button" value="Submit Now"/> <input type="button" value="Cancel"/></p>							

6. Because the asset belongs to Bob, leave that field blank.

Notice that the **Ticket Type** is already filled out.

7. Click **Submit Now**.



8. Click **OK**.

Finding the service request

9. Find the new service request in the My Requests portlet and click it.



From the View Service Request screen, Bob has Read access to much of the ticket. He can also add logs and attachments, or read logs and solutions posted by the help desk.

10. Close Mozilla Thunderbird

You have reached the end of the exercises.

Inform your instructor that you have completed the exercises in this chapter.

Unit 7 Workflows exercises

These exercises continue the handling of a complex issue.

Exercise 1 Using workflows to successfully resolve a service request

In this scenario, a call comes in with a simple request. You search for and find a solution, and then resolve the request.

This exercise shows you how using workflows can help you work faster and more consistently.

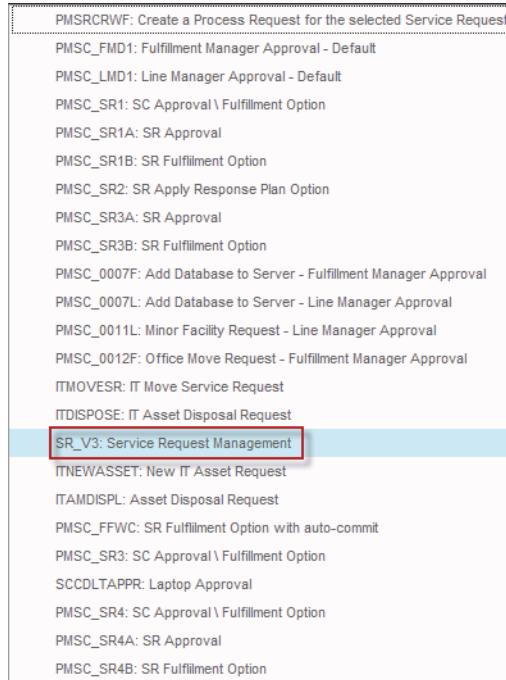
Routing a workflow

Steve calls the help desk to report slow network performance. He talks to Scott, who opens a service request. In this exercise, Scott routes the service request through the SR_V3 workflow, which enforces a process for service requests. Finally, the workflow ensures that required fields are completed before proceeding. It prompts the service desk analyst to search for a solution, and prompts the analyst to complete processing of the ticket. In a production environment, the workflow enforces proper ticket handling processes.

1. Sign in as Scott with the user name **scott** and the password **object00**.
2. Click the **New SR Full** item in the **Quick Insert** portal.
3. Before doing anything else, click the **Route Workflow** icon.



4. Select the **SR_V3** workflow and click **OK**. It might take a minute or so to start the workflow the first time.



As you can see from the message, the workflow verifies that certain fields are completed before you continue.



5. Click **Close** to close the message window.

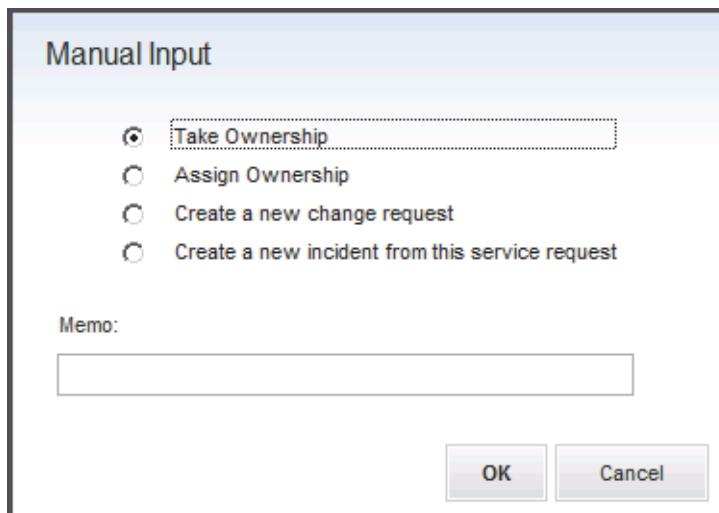
Entering basic information

6. Enter the following information.

Field	Value
Source	PHONECALL
Reported by	Steve
Summary	{Workflow} Network performance is slow
Details	Workflows make processes easier.
Site	PMSCRT

Field	Value
Reported Priority	1
Impact	2
Urgency	1
Classification	2103 - IT Issue \ Networks

7. Save the ticket.
8. Click the **Route Workflow** icon.
9. Select **Take Ownership** and click **OK**.



10. Click the **Route Workflow** icon again.

The workflow opens the **Search For Solutions** application for you.

11. Enter search terms **network slow** and click **Search**.
12. View the details of the discovered solution by clicking the gray triangle.
Scott verifies with Steve that this solution answers his question.
13. Click **Use Solution**.
14. Click the **Route Workflow** icon.
15. Select **A solution was found** and click **OK**.
Scott asks if there is anything else he can help Steve with. Steve says no and asks to close the ticket.
16. Select **The service request has been fulfilled** and click **OK**.
The status of the ticket is automatically changed to **Closed**.

You can see how the workflow process automates steps and verifies that fields are correctly completed.



Note: Companies customize workflows before using them. Business requirements dictate what actions the workflows perform. For example, the workflow can be changed to set the ticket to Resolved, or require other fields to be completed.

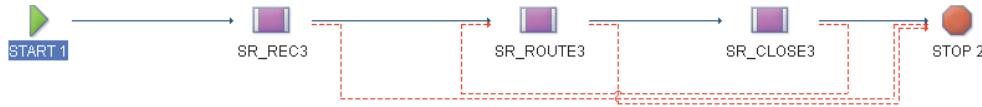
Exercise 2 Reviewing a workflow

In this exercise, you open the SR_V3 workflow in the Workflow Designer application and review some of the details.

Opening SR_V3 in the Workflow Designer

1. Select **Go To Applications > System Configuration > Platform Configuration > Workflow Designer**.
2. Find and select **SR_V3**.

Notice that the workflow contains a start node, a stop node, and three subprocesses.



3. Double-click **SR_REC3**.

The title and description of the subprocess are shown here, but to get details or make changes, you must open the subprocess in the Workflow Designer.

4. Click **OK**.

Opening SR_REC3 in the Workflow Designer

5. Click **List View** to return to the workflow list.
6. Find and select **SR_REC3**.
7. Review the properties for conditional node **REC_SR**.

This condition ensures that particular fields are completed before continuing the workflow. Review the SQL expression to see which fields are required. If the statement evaluates to FALSE, the negative (red dashed) line is followed.

8. Click **OK** to close the node properties.
9. Review the properties for interaction node **MSG1**.
This message is displayed when the required fields are not completed.
10. Click **OK** to close the node properties.
11. Repeat this process to review the properties for the remaining nodes.
12. Sign out.

You have reached the end of the exercises. Inform your instructor that you have completed the exercises in this unit.

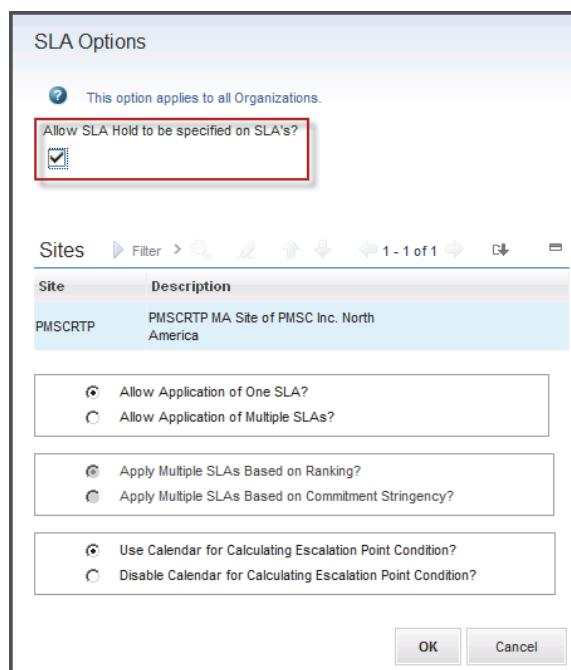
Unit 8 Service level agreements exercises

Exercise 1 Enabling SLA Hold

By default, SLA Hold is disabled, but you can enable it in the Organizations application. In this exercise, you enable SLA Hold.

Enabling SLA Hold

1. Sign in as **maxadmin** with the password **object00**.
2. Start the Organizations application by clicking the Go To Applications navigation bar and selecting **Administration > Organizations**.
3. Press Enter to see the list of organizations.
4. Click the **PMSCIBM** organization.
5. On the navigation bar in the **More Actions** section, click **SLA Options**.
6. Select the option **Allow SLA Hold to be specified on SLAs**.



7. Review the other options available when configuring SLAs.
8. Click **OK**.

Exercise 2 Creating a new SLA

In this exercise, you create an SLA for service requests.

Creating an SLA

1. Start the Service Level Agreements for Service Providers application by clicking the **Go To Applications** navigation bar and selecting **Service Level > Service Level Agreements (SP)**.
2. In the **Common Actions** list, click **New SLA**.
3. Enter the following values:

Field	Value
Description	Demo SLA for Service Requests
Applies To	SR
Enable SLA Hold?	<input checked="" type="checkbox"/>
Ranking	100
Start Date	{today}
End Date	{one year from today}
Review Date	{six months from today}
Ticket Organization	PMSCIBM
Ticket Site	PMSC RTP

Defining a commitment

4. In the Commitments section, click **New Row**.
5. Enter the following details for the new commitment:
 - Description: **Contact within 1 hour**
 - Type: **Contact**
 - Value: **1**
 - Units of Measure: **hours**

Defining an escalation

- Click the **Define Escalation** icon.

Commitments		Type	Value	Unit of Measure
1001	Contact within 1 hour	CONTACT	1.00	HOURS

Details

* Commitment: 1001 Contact within 1 hour * Value: 1.00 * Type: CONTACT * Unit of Measure: HOURS Time Period (Days):

New Row

The **Escalation** tab opens.

- Click the **set schedule** icon.
- Set the schedule to every 10 minutes.

Set Schedule

Select Schedule or Time Interval

Select a date interval and then Preview to see the dates.

Every [text box] second(s)

Every [text box] 10 minute(s)

Every [text box] hour(s),

- Click **OK**.

- Under **Escalation Points**, set the elapsed time interval to **30 minutes**.

- Save the escalation.

Escalation Points		Elapsed Time Attribute	Elapsed Time Interval	Interval Unit of Measure
1	CONTACTDATE	30.00	MINUTES	

Details

Escalation Point: 1 Elapsed Time Interval: 30.00 Elapsed Time Attribute: CONTACTDATE Interval Unit of Measure: MINUTES Escalation Point Condition: ACTUALCONTACTDATE is null and status not in (select value from synonymdomain where maxvalue='SLAHOLD') Repeat?

New Row

Defining a notification

12. Below the Escalations section, click the **Notifications** sub-tab.
13. Click **New Row** in the **Notifications** area.
14. Click the **Detail Menu** icon beside **Template** and click **Select Value**.
15. Click **SRTGTEMP**.
16. Save the escalation.



Note: In a customer or production environment, a communication template would be created for SLA purposes. Creating communication templates is beyond the scope of this class, and this template is being used only because one is required for the escalation.

Configuring the second commitment

17. Return to the **Service Level Agreement** tab.
18. In the Commitments section, click **New Row**.
19. Enter the following details for the new commitment:
 - Description: **Response within 12 hours**
 - Type: **Response**
 - Value: **12**
 - Units of Measure: **hours**
20. Click the **Define Escalation** icon for the new commitment.
21. Under Escalation Points, set the elapsed time interval to **6 hours**.
22. Click **New Row** in the **Notifications** area.
23. Click the **Detail Menu** icon beside **Template** and click **Select Value**.
24. Click **SRTGTEMP**.

Configuring the third commitment

25. Return to the **Service Level Agreement** tab.
26. In the Commitments section, click **New Row**.

27. Enter the following details for the new commitment:

- Description: **Resolution within 24 hours**
- Type: **Resolution**
- Value: **24**
- Units of Measure: **hours**

28. Click the **Define Escalation** icon for the new commitment.

29. Under Escalation Points, set the elapsed time interval to **12 hours**.

30. Click **New Row** in the **Notifications** area.

31. Click the **Detail Menu** icon beside **Template** and click **Select Value**.

32. Click **SRTGTEMP**.

33. Save the SLA record.

Validating the escalation

34. Return to the **Service Level Agreement** tab.

35. In the **More Actions** section of the navigation bar, click **Escalation > Validate Escalation**.



A message states the validation was successful.

36. Click **Common Actions > Change Status**.

37. Change the status to **Active** and click **OK**.

The SLA is now activated and ready to be applied to a Service Request.

Exercise 3 Applying the SLA

In this exercise, you apply an SLA to a ticket and process the ticket before the SLA is broken.

Creating a service request

1. Start the Service Requests application by clicking the **Go To Applications** navigation bar and selecting **Service Desk > Service Requests**.
2. Click **New Service Request** and enter the following information:
 - Reported by: **Bob**
 - Reported Priority: **1**
 - Summary: **SLA Demo**
3. Click **Submit Now**.
4. Scroll down to the Service Request Details section and enter a Site of **PMSC RTP**.

Applying the SLA

5. In the **More Actions** section of the navigation bar, click **Apply SLA**.
6. Scroll down to the **Key Dates** section.

Notice that the **SLA Applied** check box is selected.

The screenshot shows the 'Key Dates' section of a service request form. It includes fields for Reported Date (9/7/16 17:40:07), Actual Contact, Actual Finish, Adjusted Contact, Adjusted Finish, and Accumulated Hold Time (0:00). Below these fields are two checkboxes: 'SLA Applied?' and 'SLA Hold Enabled?'. The 'SLA Applied?' checkbox is checked and highlighted by a red arrow.

Verifying the SLA

7. Click **View SLAs**.

- Verify that the target contact date is 1 hour after the reported date.

The screenshot shows the 'View SLAs' dialog box. At the top, there are four groups of date fields: 'Reported Date' (6/12/13 14:21:11), 'Target Contact' (6/12/13 15:21:11), 'Adjusted Contact' (6/12/13 15:21:11), and 'Actual Contact' (empty). Below these are 'Affected Date' (6/12/13 14:21:11), 'Target Start' (6/13/13 02:21:11), 'Adjusted Start' (6/13/13 02:21:11), and 'Actual Start' (empty). Then are 'Creation Date' (6/12/13 14:21:11), 'Target Finish' (6/13/13 14:21:11), 'Adjusted Finish' (6/13/13 14:21:11), and 'Actual Finish' (empty). An 'Accumulated Hold Time(HH:MM)' field shows 0:00. At the bottom right is an 'OK' button.

SLA	Description	Applies To	Type	Adjusted Contact Time	Adjusted Response Time	Adjusted Resolution Time	Shift	Enable SLA Hold
S1001	Demo SLA for Service Requests SR	CUSTOMER	SR	6/12/13 15:21:11	6/13/13 02:21:11	6/13/13 14:21:11		<input checked="" type="checkbox"/>

- Verify that the target start is 12 hours after the reported date
- Verify that the target finish is 24 hours after the reported date.
- Click OK to close the **View SLAs** dialog box.

Change the ticket status

- Take ownership of the ticket. Notice that the status changed to Queued, but there was no change to any of the date fields.
- Change the ticket status to **In Progress** and click **View SLAs**.
Notice that the **Actual Start** field automatically displays the time that the status was changed.
- Is the **Actual Start** earlier than the **Target Start**?
Yes, it is. You met the 12-hour response commitment.
- Click OK to close the **View SLAs** dialog box.
- Change the ticket status to **Pending**. Did any date fields change?
*No, no date fields changed because the **Pending** status does not set a date field.*
- Click OK to close the **View SLAs** dialog box.
- Set the ticket status to **Resolved**.
Notice that the **Actual Finish** time automatically displays the time that the status was changed.
- Is the **Actual Finish** time earlier than the **Target Finish**?
Yes, it is. You successfully met the one-day resolution commitment.

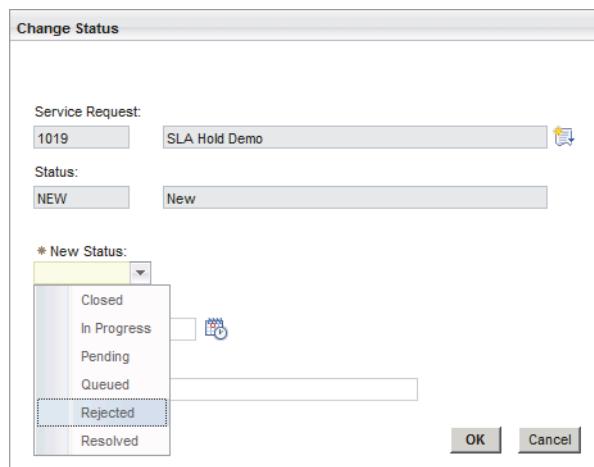
20. Click OK to close the **View SLAs** dialog box.

Exercise 4 Pausing the clock with SLA Hold

Use SLA Hold to pause an SLA when, for reasons beyond your control, you cannot work on a ticket.

Creating a service request

1. If you are not in the Service Requests application, click the **Go To Applications** navigation bar and select **Service Desk > Service Requests**.
2. Click the **New Service Request** icon.
3. Enter the following information:
 - Reported by: **Bob**
 - Reported Priority: **2**
 - Summary: **SLA Hold Demo**
4. Click **Submit Now**.
5. Enter the following extra information:
 - Classification: **210302 (IT Issue \ Networks \ LAN)**
 - Site: **PMSC RTP**
6. Click the **Save Service Request** icon.
7. Click the **Change Status** icon. View the ticket statuses that are available and notice that there is no SLA Hold status.



8. Click **Cancel**.

Applying the SLA

- In the **More Actions** section of the navigation bar, click **Apply SLA**.

Notice that two check boxes are now selected: **SLA Applied** and **SLA Hold Enabled**.

Site:
PMSCRTP 

SLA Applied?

SLA Hold Enabled?

Also, notice that a new ticket section was added to the right of the **Dates** section.

Adjusted Contact:

Adjusted Finish:

Accumulated Hold Time(HH:MM):
0:00

Verifying SLA times

- Verify that the correct SLA response and resolution times are shown. The adjusted contact is the current time plus 1 hour; the adjusted start is the current time plus 12 hours; the adjusted finish is the current time plus 24 hours.

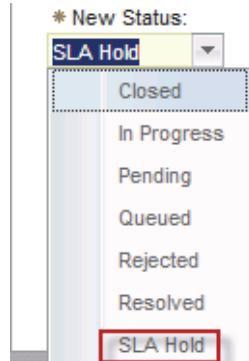
Dates

Reported Date: 6/18/12 20:09:25  	Target Contact: 6/18/12 21:09:25  	Actual Contact: <input type="text"/>  
Affected Date: 6/18/12 20:09:25  	Target Start: 6/19/12 08:09:25  	Actual Start: <input type="text"/>  
Creation Date: 6/18/12 20:09:25  	Target Finish: 6/19/12 20:09:25  	Actual Finish: <input type="text"/>  
Outage Duration: 0:00		<input type="text"/>

Because SLA hold is not in effect, notice that **Accumulated Hold Time (HH:MM)** is 0:00.:

Turning on SLA Hold

11. Click the **Change Status** icon. Change the ticket status from **New** to **SLA Hold**. Control Desk added this status after you applied the SLA Hold service level agreement.



12. Wait at least 1 minute.



Note: While the ticket has a status of **SLA Hold**, no SLA escalations can fire.

13. Check the ticket status time by selecting **More Actions > View History**. Note how much time is shown in the **Time Spent** field of the **SLAHOLD** row.



Note: The **Time Spent** field is not completed until the ticket's status is changed from SLA Hold. The calculation does not occur until SLA Hold has been activated and deactivated.

SLAHOLD				9/7/16 18:02:09	MAXADMIN		
NEW				9/7/16 17:55:45	MAXADMIN		00:06:24

14. Click **OK** to close the window.

15. Change the ticket status to **Pending**.

Notice that the time the ticket was in SLA Hold status is shown in the **Accumulated Hold Time (HH:MM)** field.

The screenshot shows the 'SLA Hold' dialog box with the following fields:

- Adjusted Contact: 6/18/12 21:14:25
- Adjusted Start: 6/19/12 08:14:25
- Adjusted Finish: 6/19/12 20:14:25
- Accumulated Hold Time(HH:MM): 0:05

The 'Accumulated Hold Time(HH:MM)' field is highlighted with a red border.

This time (rounded to the nearest minute) was added to the **Adjusted Start** and **Adjusted Finish** times.

The screenshot shows two windows side-by-side. On the left is the main ticket view with fields: Target Contact (6/18/12 21:09:25), Actual Contact (empty), Target Start (6/19/12 08:09:25), Actual Start (empty), Target Finish (6/19/12 20:09:25), Actual Finish (empty), and Outage Duration (0:00). On the right is the 'SLA Hold' dialog box with the same four fields as above, plus an additional 'Accumulated Hold Time(HH:MM)' field set to 0:05. Red dashed arrows point from the 'Actual Start' and 'Actual Finish' fields in the main window to their respective counterparts in the SLA Hold dialog box.

Now the time the ticket was in the SLA Hold status is not counted against the SLA when meeting commitments. Tickets can be moved into and out of SLA Hold status multiple times.

16. Return to the **Start Center**.

17. Sign out.

You have reached the end of the exercises. Inform your instructor that you have completed the exercises in this unit.



Important: When this exercise was written, the classroom image was misreporting SLA hold time. The minutes the ticket was in SLA Hold status was being added as seconds to the Adjusted Start and Adjusted Finish times. It was unclear at the time if the issue was with the product or with the classroom image. Your instructor will update you regarding the current status. The exercise will demonstrate the capability, however the actual times will be incorrect.

Unit 9 Surveys exercises

These exercises take you through the process of creating and sending surveys.

Survey forms

Surveys take different forms, depending on whether or not you want to know who is filling them out.

- **Tracked:** This form requires users to log in to complete the survey. The Survey application tracks whom the survey is sent to and ensures that only those users can access and complete the survey. To complete the survey, a user must sign in to IBM Control Desk. This survey type is based on Maximo. You access it through the Survey Request self-service application.
- **Untracked:** These surveys do not track the users, so that users can complete surveys anonymously. The user accesses these surveys through a direct link to the survey; there is no requirement to log in to IBM Control Desk. This survey type is JavaServer Page (JSP) and is browser-based.

Which form the user receives depends on the survey URL that is sent to them.

Survey creation overview

Surveys are created by using the following steps:

1. Create a set of questions in the Questions application.
2. (*optional*) Create a survey template in the Survey Template application.
3. Create a survey in the Survey application.
4. Assign the survey to a Maximo object.
5. Assign questions to the survey.
6. (*optional*) Apply a template.

Exercise 1 Creating question and answer sets

You begin creating a survey by creating survey questions and their selectable answers. You can then associate one or more of these questions to one or more surveys. The same question can be associated to more than one survey.

Creating the first question

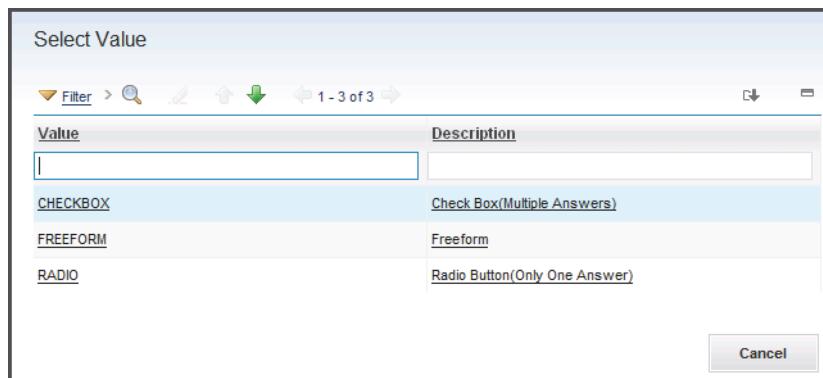
1. Sign in as **Maxadmin** with the user name **maxadmin** and the password **object00**.
2. On the navigation bar, click **Go To Applications > Administration > Survey Management > Questions** to open the Questions application.
3. Click the **New Question** icon.

If the Question or Answers are more than 150 characters, it will be truncated in the survey application, if it is more than 150 characters

Question ID:
1001

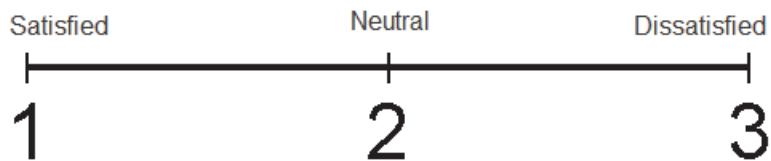
Question:
Rate your satisfaction with the service desk.

4. Type the following text in the question field: **Rate your satisfaction with the service desk.**
5. Beside the **Type** field, click the **Select Value** icon.
6. Select **RADIO**.



7. Create an answer for this question by clicking **New Row**.
 8. Type an answer of **Satisfied**, a weight of **1**, and an order of **1**.
- Order** determines the arrangement of the answers in the survey. Use this setting to reorder answers independent of the order in which they are shown in the **Answer** section.

Weight defines a range of possible values, important for reporting. Weight is typically used for satisfaction-type questions like this one. In this example, 1 represents Satisfied, and 3 represents Dissatisfied. After a report averages the responses, it is apparent that a 1.2 average represents many satisfied customers, but a 2.6 average indicates many dissatisfied customers.



9. Create another answer of **Neutral**, a weight of **2**, and an order of **2**.
10. Create another answer of **Dissatisfied**, a weight of **3**, and an order of **3**.

Answer	Weight	Order	
Satisfied	1	1	
Neutral	2	2	
Dissatisfied	3	3	

11. Click the **Save Question** icon.

Notice that you can assign questions to a particular organization or site if you want. Also, notice that questions are created in an Active state by default.

Creating the second question

12. Click **New Question**.
13. Type the following question: **What methods did you try to resolve the issue?**
14. Beside the **Type** field, click the **Select Value** icon.
15. Click **CHECKBOX**.
16. Create an answer for this question by clicking **New Row**.
17. Type an answer of **Self service**, a weight of **10**, and an order of **1**.
18. Create another answer of **Telephone support**, a weight of **1000**, and an order of **2**.

19. Create another answer of **Other**, a weight of **100000**, and an order of **3**.

Answer	Weight	Order	
Self service	10	1	
Telephone support	1000	2	
Other	100000	3	
			New Row

20. Save the question.

View the questions

21. Click the **All Records** query.

Question ID	Question	Type	Status
1001	Rate your satisfaction with the service desk.	RADIO	ACTIVE
1002	What methods did you try to resolve the issue?	CHECKBOX	ACTIVE

IBM Control Desk comes with 20 predefined questions and shows 20 rows at a time. You must go to the next page to see the new questions.

22. Click the **Next Page** icon.

The two new questions are visible.

Exercise 2 Creating a survey

You can create new surveys, manage existing surveys, and then send these surveys to users for their responses. A survey must have one or more questions that are associated with it. You can use the same questions in more than one survey.

After the questions are created, open the **Survey Management** application and relate the questions.

The sequence of status change for the survey is Draft, Active, and Closed.

- When the status is Draft, users can continue to update the survey contents (questions and answers).
- When the status of the survey is changed to Active, the survey is ready to be published to customers. In the Active state, the survey cannot be changed back to Draft, and the survey questions and answers cannot be updated.
- To make updates to an active survey, you must change the status to Closed. Then you can duplicate the original survey. The new duplicate survey starts in Draft state and you can make updates. The duplicate survey is independent of the original survey. When the survey state is Active, the attributes on the record are changed to read-only.

Creating a new survey

1. Open the **Surveys** application (On the navigation bar, click **Go To Applications > Administration > Survey Management > Surveys**).
2. Press Enter to list the default surveys.



Note: Basic surveys are included with IBM Control Desk for Service Catalog, Service Requests, Incidents, and Problems.

3. Click the **New Survey** icon.
4. Complete the following fields:
 - Survey: **SRM Survey**
 - Description: **Demo SR Survey**

5. Set the **Applies To** object to **SR**.

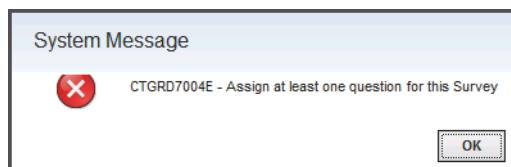
The screenshot shows a survey creation form. The 'Survey ID' is 1001. The 'Survey' name is 'SRM Survey'. The 'Description' is 'Demo SR Survey'. In the 'Applies To' section, the input field contains 'SR' and has a magnifying glass icon next to it. Below the input field is a 'Template Id' section with two dropdown menus and a double arrow icon between them.

Note: the **Applies To** field is used when automatically sending a survey, which is done through an escalation. The object that is specified in the **Applies To** field is the type of object that triggers the escalation. If you plan to send a survey manually only, you would set the **Applies To** object to **Default**.

As soon as you enter the **Applies To** object, the **Tracked URL** and **UnTracked URL** fields are automatically completed.

The screenshot shows the survey creation form with various metadata fields. The 'Status' is 'DRAFT'. The 'Creation Date' and 'Changed Date' are both '6/14/13 17:24:32'. The 'Site' and 'Organization' fields are empty. The 'Created By' field contains 'MAXADMIN'. Below these, the 'Tracked URL' field contains 'http://itracr/maximo/ui/maximo.jsp?event=loadapp&value=surv' and the 'UnTracked URL' field contains 'http://itracr/maximo/webclient/survey/jspssurvey.jsp?userId=m'. Both of these fields are highlighted with a red border.

6. Try saving the survey. Does it work?



7. Click **OK**.

8. Click **Select Questions** in the **Select Questions for Survey** section.

9. Select the questions that you created previously, as shown in the following graphic.



10. Click **OK**.

If you wanted, you could change the order of the questions by changing the **Order** fields.

11. Verify that the survey automatically saved. You can save the survey by clicking the **Save Survey** icon.

Exercise 3 Previewing the survey

Before deploying a survey, preview it to make sure that everything is correct. Surveys have two different forms. The **Tracked** form is based on Tivoli's process automation engine. The **Untracked** form is based on a JavaServer Pages (JSP) browser. Each type of form is previewed differently.

Previewing tracked surveys

Preview tracked surveys, which are based on Tivoli's process automation engine, by using the **Survey Preview** tab.

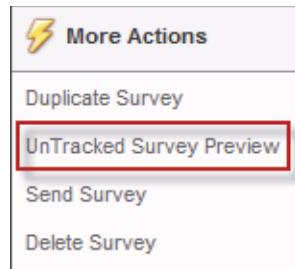
1. Click the **Survey Preview** tab.

The screenshot shows a survey preview interface. At the top, there are three tabs: 'List View' (disabled), 'Survey' (disabled), and 'Survey Preview' (selected). Below the tabs, the main area has a header 'Fill the questions for the survey'. The first question is '1. Rate your satisfaction with the service desk.' It includes a radio button group with 'Satisfied' selected, and options for 'Neutral' and 'Dissatisfied'. The second question is '2. What methods did you try to resolve the issue?'. It has a 'Select Answer' button followed by a list of four items: 'Check all boxes', 'Self service', 'Telephone support', and 'Other'. The 'Self service' option is highlighted with a blue background. A note at the bottom left says: 'Note: You can see how plain this survey is. You create a survey template in [Exercise 10](#) on page 9-25 that can add an image and some introductory text to your survey.'

Previewing untracked surveys

Preview untracked surveys, which are JSP browser-based, by using a browser.

1. Click **UnTracked Survey Preview** from the **More Actions** menu.



After a short delay, a new browser window opens, showing the previewed survey.

If the survey is not opened, verify that your browser allows pop-up windows.

The survey preview shows two questions:

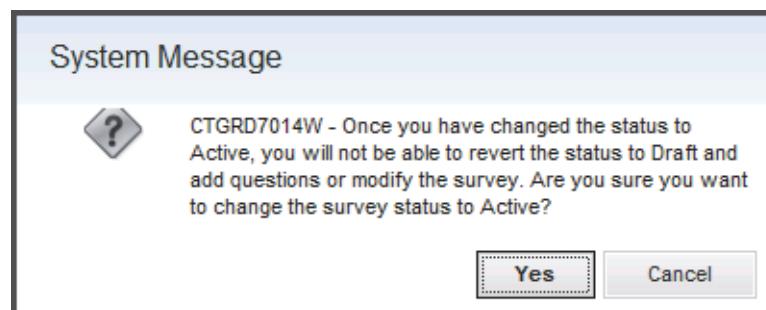
1. Rate your satisfaction with the service desk.
 Satisfied
 Neutral
 Dissatisfied
2. What methods did you try to resolve the issue?
 Self service
 Telephone support
 Other

Notice that the display of this untracked survey looks a little different from the tracked survey.

When you are satisfied with how the survey looks in both the tracked and untracked forms, you can make it active.

2. Close the **UnTracked Survey** browser window.
3. Click **Common Actions > Change Status**.
4. Change the status of the survey to **Active** and click **OK**.

A system message window opens.



5. Click **Yes**.

Exercise 4 Sending surveys manually

Surveys can be sent to users either manually or automatically:

- **Manually:** Surveys can be sent immediately after an interaction with the service desk.
- **Automatically (by condition or escalation):** Surveys can be sent after a number of days, number of tickets, or other criteria. You try this method in [Exercise 9, “Sending a survey automatically,” on page 9-19](#).

The simplest method of sending surveys is by doing it manually each time. You normally use this method when you want to send a survey to customers immediately after taking care of their issue.



Note: Only surveys with a status of Active can be sent.

There are two survey communication templates that are preconfigured with IBM Control Desk.

Template	Description
SURVEYTRACKED	Communication Template for sending a Tracked Survey.
SURVEYUNTRACKED	Communication Template for sending a Un-Tracked Survey.

You send the surveys to *Bob*, who represents a standard user.

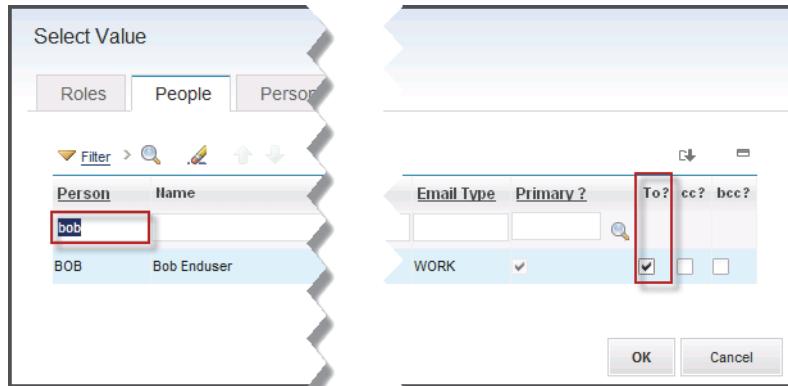
Sending a tracked survey

1. Click the **Survey** tab.
2. Select the URL listed in the **Tracked URL** field, right-click it, and click **Copy**.
3. In the navigation bar under **More Actions**, click **Send Survey**.
4. Beside the **Template** field, click the **Detail Menu** icon and click **Select Value**.
5. Click the communication template titled **SURVEYTRACKED**. This template completes certain fields with predetermined values.



Note: In a production environment, templates are customized to save time by completing fields with appropriate information. In the lab exercises, these templates are not customized, and are for demonstration only. You manually configure the communication to override the template. The **Send From**, **Subject**, and **Message** fields are populated with data from the template. Updating and using the template saves time when sending surveys.

6. Replace the URL in the message field with the URL you copied in [Step 2](#) on page 9-10.
7. Change the **Subject** field to **Tracked Survey**.
8. Select who the survey is sent to by clicking the **Select Value** icon beside the **To** field.
9. Click the **People** tab.
10. Filter on **bob**.
11. Select the **To** option for Bob.



12. Click **OK**.
- Bob's email address, **bob@itracmail.tiv.ibm.com**, is placed into the **To** field.
13. Change **Send From** to **maxadmin@itracmail.tiv.ibm.com**.

A screenshot of the 'Send Survey' dialog. The 'Template' dropdown is set to 'SURVEYTRAC'. The 'To:' field contains 'bob@tivoli.edu'. The 'Subject' field is set to 'Tracked Survey'. The 'Message' field contains a URL: 'http://itrac/maximo/u/maximo.jsp?event=loadapp&value=surveyreq&sid=1001&recordclass=SR&recordkey=:TICKETID&'. The 'Send From:' field is set to 'administrator@tivoli.edu'. The 'Send' button is visible at the bottom right.

14. Click **Send**.
- A quick status message indicates that the communication was sent.

BMXAA0260I - Communication has been sent.

Sending an untracked survey

15. Select the URL listed in the **UnTracked URL** field, right-click it, and click **Copy**.
16. On the navigation bar under **More Actions**, click **Send Survey**.
17. Select the communication template titled **SURVEYUNTRACKED**. This template completes certain fields with predetermined values.
18. Replace the URL in the message field with the URL you copied in Step 15.
19. Change the **Subject** field to **Untracked Survey**.
20. Select **bob** as the person to send to, as you did in the previous section.
21. Change **Send From** to **administrator@itracmail.tiv.ibm.com**.
22. Click **Send**.

Exercise 5 Viewing the number of survey responses received

1. Return to the list view, and press Enter to view all records.
2. Look at the row that contains the survey that you created and at the last column, **Response Received**.

Survey ID	Survey	Applies To	Status	Site	Organization	Response Received
SRM1004	Standard SC Survey	SR	DRAFT			
SRM1001	Standard Service Request Survey	SR	DRAFT			
SRM1002	Standard Incident Survey	INCIDENT	DRAFT			
SRM1003	Standard Problem Survey	PROBLEM	DRAFT			
1001	SRM Survey	SR	ACTIVE			0

This column shows that you did not receive any responses to the survey you sent out.

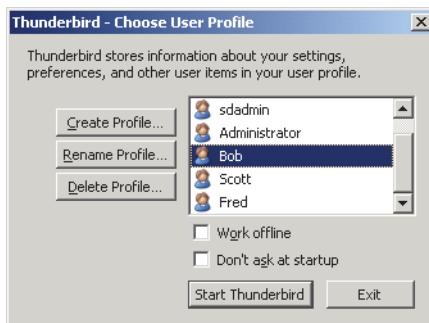
3. Sign out.
4. Close the browser.

Exercise 6 Taking the surveys

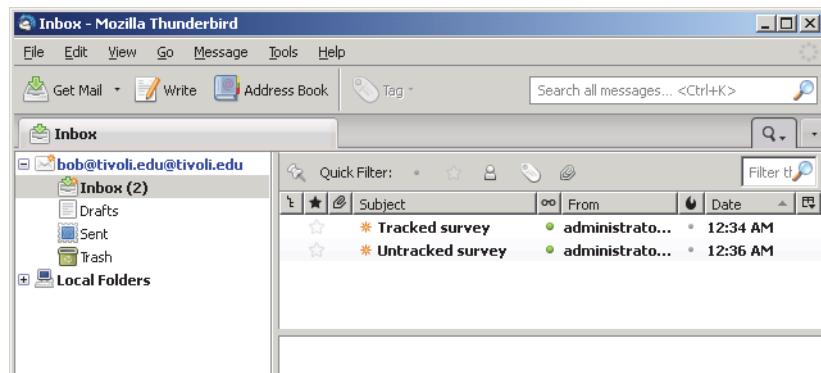
Taking a tracked survey

When users click this type of URL from their email, they are taken to the IBM Control Desk login page. Upon successful authentication, the new Survey Request application automatically opens and users see the survey.

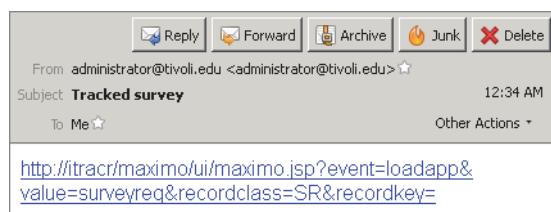
1. Open the **Mozilla Thunderbird** email application by clicking the icon beside the Windows Start button.
2. Choose the **Bob** profile.



3. There are now two new emails. If there are not, click **Get Mail** until the emails arrive.



4. Open the **Tracked Survey** email.



5. Click the link. A browser window opens, prompting you to sign in to **IBM Control Desk**. If you cannot click the link, you must copy and paste it into the browser window manually.
6. Sign in as **bob** with password **object00**.

IBM Control Desk opens to the **Survey Request** application. The survey that is referenced in the email is displayed.

Fill the questions for the survey

1. Rate your satisfaction with the service desk.

Satisfied
 Neutral
 Dissatisfied

2. What methods did you try to resolve the issue?

Select Answer Filter > Filter 1 - 3 of 3

<input type="checkbox"/> Check all boxes
<input type="checkbox"/> Self service
<input type="checkbox"/> Telephone support
<input type="checkbox"/> Other

7. Complete the survey with the following selections:
 - Satisfied
 - Self service
8. Scroll down and click **Submit Survey**.
9. Sign out of IBM Control Desk and close the browser.

Taking an untracked survey

10. Open the **Untracked Survey** email.

Quick Filter: Filter th

Subject: Tracked Survey From: sdadmin@tivoli.edu

Subject: Untracked Survey From: sdadmin@tivoli.edu

From: sdadmin@tivoli.edu ★
Subject: Untracked Survey
To: Me ★
<http://maxfirebsd2.tivlab.austin.ibm.com:9080/maximo/webclient/survey/jspSurvey.jsp?sid=1001&recordclass=SR&recordkey=1001>

11. Click the link that is contained in the message. If you cannot click the link, you must copy and paste it into the browser window manually.
A browser window opens, displaying the survey.

12. Complete the survey by using the following selections:

- Neutral
- Self service, Telephone support

13. Scroll down and submit the survey.

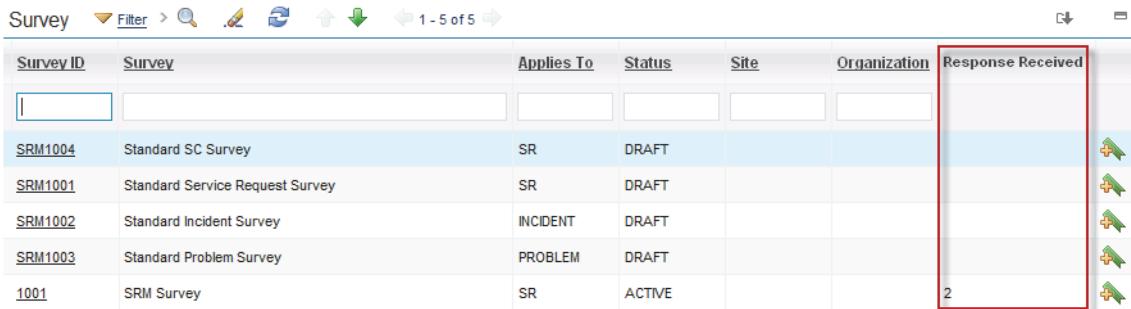
A confirmation message is displayed.

14. Close the browser window.

15. Close Mozilla Thunderbird.

Exercise 7 Viewing the number of survey responses received

1. Open a browser window and sign in to IBM Control Desk as **maxadmin** with the user name **maxadmin** and the password **object00**.
2. On the navigation bar, click **Go To Applications > Administration > Survey Management > Surveys** to open the Surveys application.
3. Press Enter to display all records.
4. Look at the row that contains the survey that you created and at the last column, **Response Received**.



Survey ID	Survey	Applies To	Status	Site	Organization	Response Received
SRM1004	Standard SC Survey	SR	DRAFT			
SRM1001	Standard Service Request Survey	SR	DRAFT			
SRM1002	Standard Incident Survey	INCIDENT	DRAFT			
SRM1003	Standard Problem Survey	PROBLEM	DRAFT			
1001	SRM Survey	SR	ACTIVE			2

This column shows the responses that are received for all surveys. You can see that two responses to your survey were received.

Exercise 8 Viewing survey results

The **Survey** application displays simple statistics for the selected survey.

1. Click the survey that you created, **SRM Survey**.

A screenshot of the Survey application's List View tab. The tab bar includes 'List View' (highlighted in blue), 'Survey', 'Survey Preview', and 'Survey Results'. The main area shows survey details: Survey ID: 1001, Survey: SRM Survey, Description: Demo SR Survey, Applies To: SR, and Template Id: (empty).

2. Click the **Survey Results** tab.

A screenshot of the Survey application's Survey Results tab for the 'SRM Survey'. The tab bar includes 'List View', 'Survey', 'Survey Preview', and 'Survey Results' (highlighted in blue). The page title is 'SRM Survey'. Key statistics shown include Survey Status: ACTIVE, Launched: 7/25/13 20:23:50, Closed:, Email Invites: 2, Viewed: 2, and Submitted: 2 (Does not include blank responses). Below this, a question is listed: '1. Rate your satisfaction with the service desk.' A table titled 'Results' shows the distribution of responses:

Answer	Count	Percent
Satisfied	1	50%
Neutral	1	50%
Dissatisfied	0	0%
Total	2	100%

You can see how many email invitations were sent, how many times the survey was viewed, and the number of responses submitted.

Each question is shown with how the question was answered, broken down into a discrete count and percentage. Freeform type questions list the answer that each respondent submits.

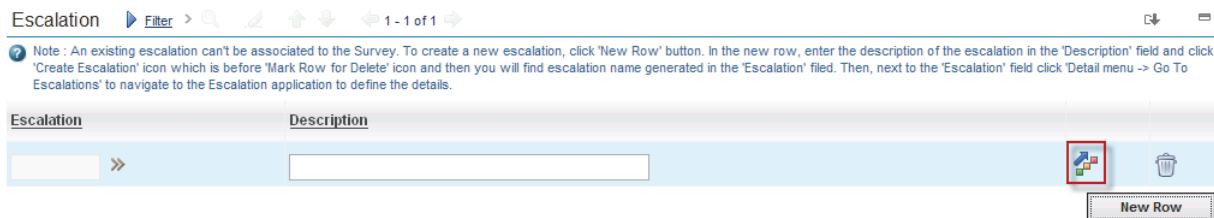
Exercise 9 Sending a survey automatically

Using escalations, you can send a survey to a particular user or a group of users automatically when a particular condition is met. The **Escalation** section in the Survey application lists the set of escalation records that are defined for this survey. Use this section to define escalation records. You can define one or more escalations for one survey.

To enable a survey to be sent automatically after a service request is closed, complete the following steps.

Creating the escalation

1. Click the **Survey** tab.
2. In the **Escalation** section, click **New Row**. Scroll down if necessary.
3. Enter the description **After SR Closed** in the new row.
4. Click the **Create Escalation** icon.



A new escalation is created in the **Escalation** application and an **Escalation ID** is displayed in the **Escalation** field.

5. Click **OK** to close the notification.
6. Click the **Detail Menu (>>)** next to the **Escalation** field and click **Go To > Escalations**. The **Escalation** application opens.

Note: The escalation **Description** and **Applies To** fields from the main table were carried over to the escalation.

7. Enter the condition: **STATUS in (select value from synonymdomain where domainid = 'SRSTATUS' and maxvalue in ('CLOSED'))**

The screenshot shows the 'Escalation' tab selected in a software interface. Under the 'Escalation' section, there is a row with '1038' and 'After SR Closed'. Below it, under 'Applies To', is 'SR'. In the 'Condition:' field, the SQL statement 'STATUS in (select value from synonymdomain where domainid='SRSTATUS' and maxvalue in ('CLOSED'))' is entered. A small icon of three colored cubes is visible next to the condition text.

Note: The SQL statement for the previous step checks the service request status and escalates only if the status is CLOSED.

8. Select **Create Successful Execution Entry** option.

9. Click **New Row** in the **Escalation Points** section.

Create an escalation point with the following attributes:

- Elapsed Time Attribute: **REPORTDATE**
- Escalation Point Condition: **STATUS in (select value from synonymdomain where domainid = 'SRSTATUS' and maxvalue in ('CLOSED'))**

The screenshot shows the 'Escalation Points' screen with one row listed. The first column is 'Escalation Point' with value '1'. The second column is 'Elapsed Time Attribute' with value 'REPORTDATE'. Below the table, in the 'Details' section, the 'Escalation Point' is set to '1', the 'Elapsed Time Attribute' is 'REPORTDATE', and the 'Escalation Point Condition' is the same SQL statement as before: 'STATUS in (select value from synonymdomain where domainid='SRSTATUS' and maxvalue in ('CLOSED'))'. A small icon of three colored cubes is visible next to the condition text.

Note: The SQL statement for the previous step causes the escalation point to act when the service request status is CLOSED. The escalation point determines when the escalation condition is checked.



Attention: The use of proper syntax within the **Condition** fields is critical to the success of this exercise. If the syntax is incorrect when the escalation runs, results are unpredictable. Each of the condition text boxes has an icon centered to its right. When selected, the icon will display a validation dialog for the command within the box. Select the icon, then select the **Test Expression** button in the lower left. If the syntax is reported as correct, select **OK**. to continue. If the syntax is incorrect, you may be required to select **Cancel** to exit the application. Locate the error in the syntax and retest it until the test passes.

10. Save the escalation.

Creating the notification

11. Create a notification by selecting the **Notifications** sub-tab at the bottom of the page and clicking **New Row**.

The screenshot shows a user interface for managing notifications. At the top, there are two tabs: 'Actions' and 'Notifications'. The 'Notifications' tab is currently selected and has a red border around it. Below the tabs, there is a toolbar with icons for filtering, searching, and sorting. The main area is titled 'Notifications' and shows a table with three columns: 'Template', 'Role Recipient', and 'Subject'. A message '...No rows to display...' is shown below the table. At the bottom right of the table area, there is a button labeled 'New Row' with a red border around it.

12. In the **Template** field, enter **ESCSRSURVEY**.
13. Click the **Detail Menu** icon after the **Template** field and select **Go To Communication Templates**.
14. When the communication template opens, scroll down to the **Message** field.
15. Review the message, ensuring the email will be sent by administrator@itracmail.tiv.ibm.com; and that the url points to **localhost:9080**.
16. Click the **Save Communication Template** icon.
17. Click **Return with Value** to return to the main escalation screen and automatically update the notification field.
18. Beside the **Schedule** field, click the **Set Schedule** icon.
19. Change the schedule to be **2 minutes** rather than the 1 hour that it currently is, and click **OK**.

The screenshot shows a 'Schedule' field with the value '2m*****'. To the right of the field is a small icon with a calendar and a clock, representing the 'Set Schedule' function.

20. Save the escalation.

21. In the navigation bar under **More Actions**, click **Validate** to make sure that the condition is correct.



22. Click **OK** to close the system message.
23. In the navigation bar under More Actions, click **Activate/Deactivate Escalation**.
Notice that the **Active** option is now selected.
24. Click **Return**.
25. Save the survey.
26. Sign out.

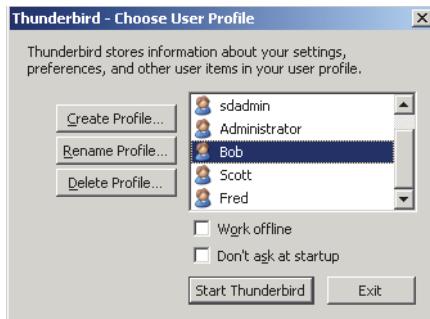
Creating the service request

27. Sign in as Scott with the user name **scott** and the password **object00**.
28. Click **New SR Full** in the Quick Insert portal.

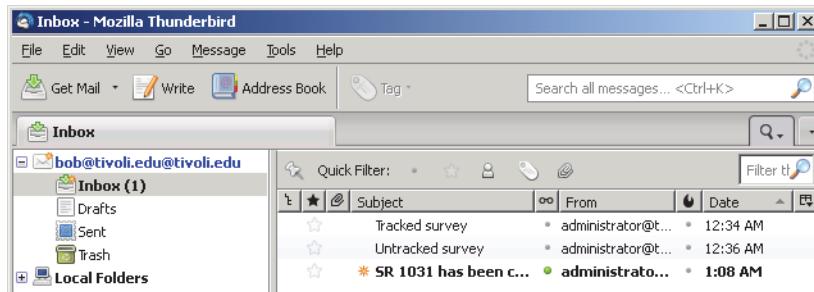


29. Enter the following information:
- Reported By: **bob**
 - Summary: **Automatic Survey Test**
30. Save the service request.
31. Select **Change Status** from the **Common Actions** menu.
32. Change the status to **Closed**.
This step triggers the escalation.

33. Sign out of IBM Control Desk.
34. Close the browser.
35. Open the **Mozilla Thunderbird** email application. The icon is on the Windows Start bar.
36. Choose the **Bob** profile.



37. There is a new email. If not, wait 2 or 3 minutes and click **Get Mail**.



38. Open the new message.

39. Click the link. A browser window opens, prompting you to sign in to IBM Control Desk.



Note: If the link in the email did not work, you can try copying the text of the link into the address bar of the browser.

40. Sign in as **bob** with the password **object00**.

IBM Control Desk opens to the self-service Survey Request application.

41. Press Enter to list the available surveys Bob can respond to.

The survey that is referenced in the email is visible.

Survey Id	Survey	Description	Record Class	Record Key
1001	SRM Survey	Demo SR Survey	SR	1030

42. Click the survey to display it.

43. Complete the survey however you would like.

44. Scroll down and click **Submit Survey**.

The survey is no longer shown in the list.

45. Sign out of IBM Control Desk.

46. Close Mozilla Thunderbird.

Exercise 10 Creating a survey template

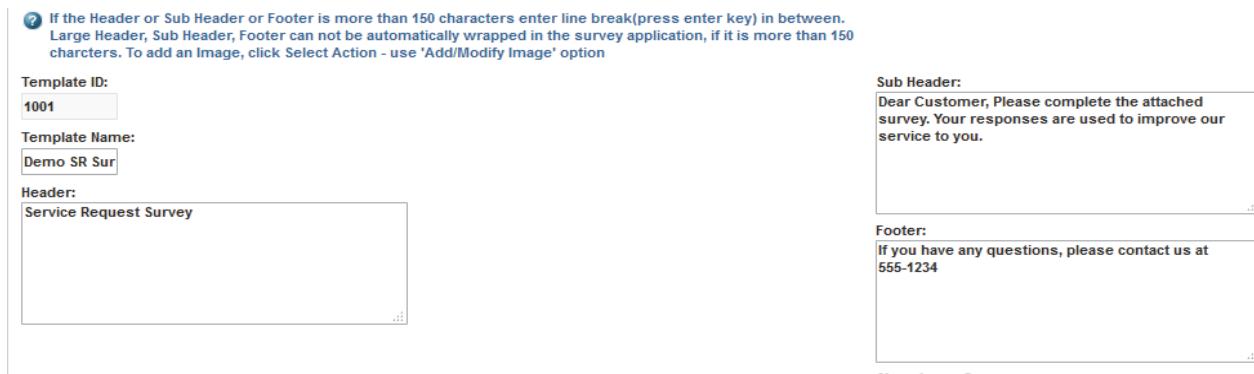
You can create survey templates to be used when creating a survey. These templates automatically complete certain survey fields with predefined values, saving you time when creating surveys.

The **Survey Templates** application is used to define these templates. Use this application to define the following fields:

- **Header** defines the survey heading.
- **Sub Header** defines description or custom messages the user can read before completing the final survey.
- **Footer** defines a custom footer message after the user completes the survey.
- **Image** is used to show a company logo or image in the final survey.

To create a survey template, complete the following steps:

1. Sign in to IBM Control Desk as **Maxadmin** with the user name **maxadmin** and the password **object00**.
2. On the navigation bar, click **Go To Applications > Administration > Survey Management > Survey Templates** to open the Survey Templates application.
3. Click the **New Survey Template** icon.
4. Enter the following values:
 - Template Name: **Demo SR Survey Template**
 - Header: **Service Request Survey**
 - Sub Header: **Dear Customer, Please complete the attached survey. Your responses are used to improve our service to you.**
 - Footer: **If you have any questions, please contact us at 555-1234.**

A screenshot of the 'New Survey Template' configuration form. It shows fields for Template ID (1001), Template Name (Demo SR Sur), Header (Service Request Survey), Sub Header (Dear Customer, Please complete the attached survey. Your responses are used to improve our service to you.), and Footer (If you have any questions, please contact us at 555-1234). A note at the top right says: 'If the Header or Sub Header or Footer is more than 150 characters enter line break(press enter key) in between. Large Header, Sub Header, Footer can not be automatically wrapped in the survey application, if it is more than 150 characters. To add an Image, click Select Action - use 'Add/Modify Image' option'.

5. On the navigation bar under More Actions, click **Add/Modify Image**.
6. Browse to **C:\labfiles\servicerequest** and select **IBMLogo.jpg**.
7. Click **OK**.

- To add the image to the survey, select the **Show Image** option.



- To see the image in a larger size, click the image.

- Close the preview.

- Click **Save Survey Template**.

After you define and create a survey template, you can apply it to a survey by completing the **Template ID** field in the Survey application.

Testing the template

To see the template in a survey, complete the following steps:

- On the navigation bar, click **Go To Applications > Administration > Survey Management > Surveys** to open the Surveys application.

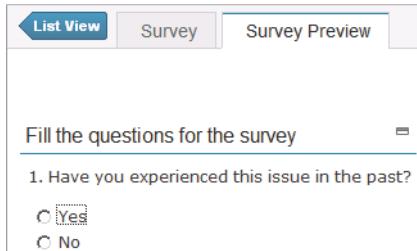
- Click **New Survey**.

- Complete the following fields:

- Survey: **Template Test**
- Description: **Template Test**
- Applies To: **SR**

- Click **Select Questions**, select the first available question, **SRM1016**, and click **OK**.

- Click the **Survey Preview** tab and view the survey.



The screenshot shows a survey preview window. At the top, there are three tabs: 'List View' (blue), 'Survey' (disabled), and 'Survey Preview' (selected). Below the tabs, a header says 'Fill the questions for the survey'. A single question is listed: '1. Have you experienced this issue in the past?'. Underneath the question are two radio buttons: 'Yes' (selected) and 'No'.

Note the empty space above the question.

- Go back to the **Survey** tab.

- In the **Template ID** field, select the template that you created.

- Save the survey.

20. Look at the survey preview again and note the differences.



Service Request Survey

Dear Customer, Please complete the attached survey. Your responses are used to improve our service to you.

Fill the questions for the survey

1. Have you experienced this issue in the past?

- Yes
 No

If you have any questions, please contact us at 555-1234

Submit Survey

21. Return to the **Start Center**.

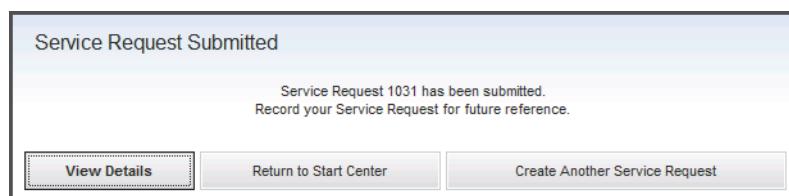
Exercise 11 Associating a survey to a ticket

It is important to be able to look at a survey sent out at the closure of a ticket to gauge customer satisfaction with the handling of the issue. With IBM Control Desk, surveys can be associated with tickets.

1. Create a service request with the summary of **Survey association test**.



2. Submit the service request and make a note of the **Service Request** number.



3. Click **Return to Start Center**.
4. On the navigation bar, click **Go To Applications > Service Desk > Service Requests** to open the Service Request application.
5. Open the service request that you created.
6. Click the **Related Records** tab.

Notice that there is nothing under the **Related Survey Record** section.

Related Survey Record		
Survey ID	Survey	Description
...No rows to display...		

7. Open the **Surveys** application.
8. Find and click the Survey ID for the original **SRM Survey** you created.
9. Verify that the **Applies To** object is **SR** (service request).
10. Copy the untracked URL from the **UnTracked URL** field.
11. On the navigation bar under **More Actions**, click **Send Survey**.

12. At the **Template ID** field, select the **SURVEYUNTRACKED** survey template.

SURVEYUNTRACKED Communication Template for sending a
Un-Tracked Survey.

13. Paste the URL from [Step 8](#) on page 9-28 into the **Message** field.

Subject:
Survey - SRM Survey Summary - Demo SR Survey : Please
Message:
http://itracr/maximo/webclient/survey/jpsurvey.jsp?userId=max

14. Enter the ticket number of the ticket you want to associate to this survey. In this case, enter the number you wrote down in [Step 2](#) on page 9-28 after the text **recordkey=** at the end of the URL.

The end of the URL looks similar to the following example:

&recordclass=SR&recordkey=<YOUR SERVICE REQUEST NUMBER>&

Message:
http://itracr/maximo/webclient/survey/jpsurvey.jsp?
userId=maxadmin&lan=EN&sid=1001&recordclass=SR&recordkey=1031&

15. Change the **Subject** field to **UnTracked Survey Association Test**.

16. Select who the survey is sent to by clicking the **Select Value** icon at the end of the **To** field.

17. Click the **People** tab and find **bob**.

18. Select the **To** option for **bob**.

19. Click **OK**.

20. Change the **Send From** field to **administrator@itracmail.tiv.ibm.com**

21. Click **Send**.

A quick status message indicates that the communication was sent.

22. Return to the **Start Center**.

23. Sign out.

24. Close the browser.

25. Open Mozilla Thunderbird with the **bob** profile and wait for the new email to arrive.

26. Click the link, answer the questions (your choice), and submit the survey.

27. Close the newly created browser window that the survey opened in.

28. Close Mozilla Thunderbird.

29. Open Internet Explorer, and sign in as **Maxadmin** with the user name **maxadmin** and the password **object00**.
30. Reopen the **Survey association text** service request.
31. Open the **Related Records** tab and note the section **Related Survey Record**, below the **Solutions** section.

Related Survey Record		
Survey ID	Survey	Description
1001	» SRM Survey	Demo SR Survey

32. Click the **Survey ID** detail menu (») and select **Go to Surveys**.
The related survey opens. Here you can look at the details of the survey that was sent.
33. Click **Return**.
34. Sign out.

You have reached the end of the exercises. Inform your instructor that you have completed the exercises in this unit.

Unit 10 Reporting exercises

The exercises in this unit familiarize you with navigation through the reporting module and provide insight into the types of reports that are provided with a base installation of IBM Control Desk. Additionally, you are exposed to methods used to request subsets of data based on a range of dates or other criteria, depending on the flexibility built into the reports.

Exercise 1 Service requests Created By Catalog Orders report

1. Sign in as **Jane** with the user name **jane** and the password **object00**.

Before you can generate a report, you must configure it.



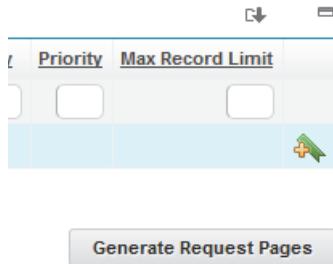
Note: Methods of generating reports in IBM Control Desk version 7.6 vary slightly, depending on the number of languages that have been selected during the product's installation. The steps in this exercise assume multiple languages. On a system with only a single language installed, the **Generate Request Page** button is displayed next to the **Preview** button when the report is selected from a list of reports.

2. From the **Navigation Bar**, click **Go To Applications**, and then **Administration > Reporting > Report Administration**.
3. If the **Filter** fields are not visible, select the arrow next to the word **Filter** in the upper left portion of the Reports application. In the **Description** field, filter for **service requests created** and press **enter**.

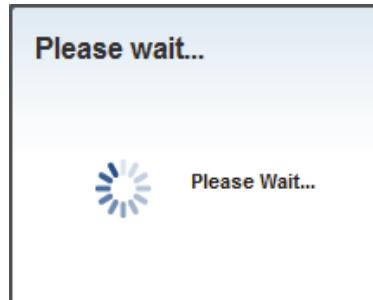
Reports	
Report File Name	Description
	service requests created
<u>flagged_actualci.rptdesign</u>	Actual CIs Flagged for Deletion
<u>deleted_actualci.rptdesign</u>	Deleted Actual CIs
<u>actualci_detail.rptdesign</u>	Actual CI Details
<u>actualci_history.rptdesign</u>	Actual CI History
<u>itclasscounts.rptdesign</u>	IT Asset Counts by Classification
<u>assetpurchcost.rptdesign</u>	Asset Purchase Cost Rollup

The report that is named **sr_from_catalog_sc.rptdesign** is the only result.

4. Click **Generate Request Page** in the lower-right corner of the Settings section.



While the query runs in the background and the report is being generated, the **Please wait** icon and message are displayed.



5. After the request page is generated, click **Close** on the system message. The report is ready to run.

6. Click **Preview**.

Request Page

Schedule

Immediate

At this Time

Recurring

Email

To:

Subject:

Comments:

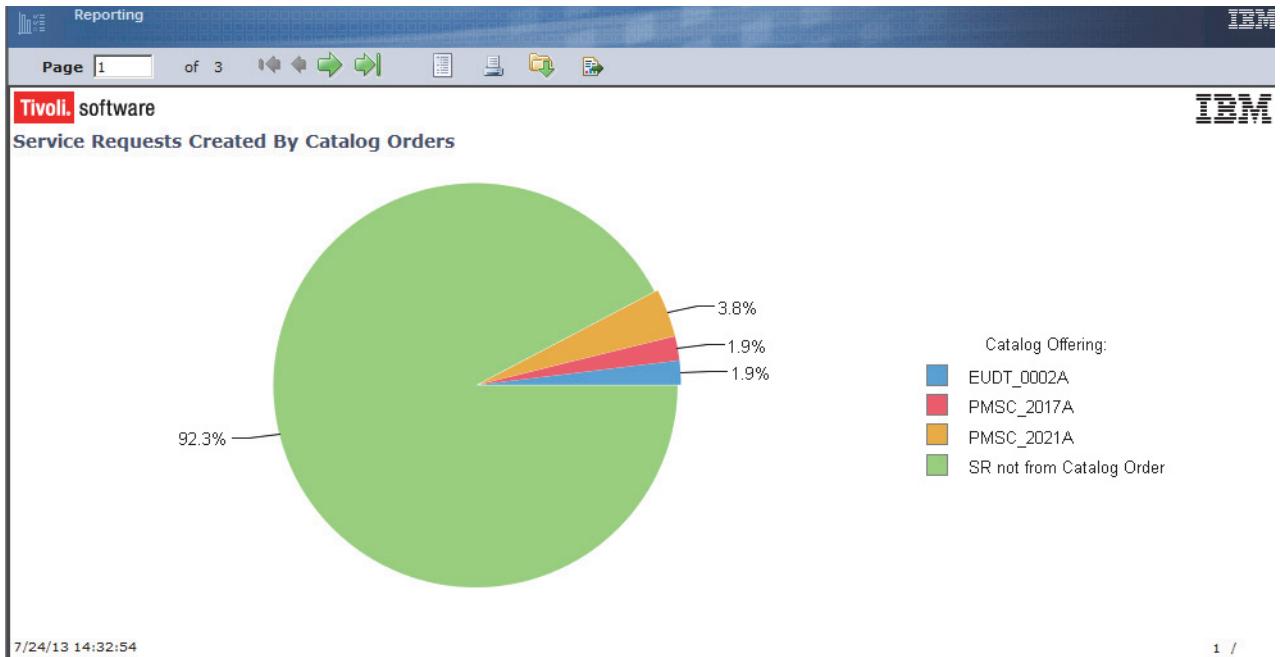
File Type: PDF XLS XLSX XLS Other

Report Delivery Format: Email with a file attachment Email with a file URL

Submit **Cancel**

7. Leave all fields at their default, and click **Submit**.

In a minute or two, a new browser window opens and the report opens.



8. Review the report, by using the arrow buttons to navigate pages.
9. Follow the hyperlink for one of the tickets and review the details that are presented.
10. Close the report by closing the browser window.

Exercise 2 Total number of incidents by internal priority report

1. Click **List View** to return to the report list.
2. Clear the **Description** field, and select the **Report Name** filter field. Press Enter to open all reports.
3. Filter the description for **total number of incidents by**.
4. Select **tlsm_Total_Number_of_Tickets.rptdesign - Total number of incidents by internal priority**.
5. When the report has been generated, click **Generate Request Page**.
6. Close the system message.
7. Click the report name, and click **Preview**.
8. Enter a **start date** of **January 1, 2000**, and an **end date** of today.
9. Click **Submit**.
10. Review the report.
11. Close the report by closing the browser window.
12. When you are finished, sign out.

You have reached the end of the exercises. Inform your instructor that you have completed the exercises in this unit.



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