

Course Guide

IBM Control Desk 7.6 Service Request Management Fundamentals

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Contents

About this course	xvii
Course objectives	xix
Audience	xix
Prerequisites	xix
Course description	xx
Unit 1 Overview	1-1
Objectives	1-2
Lesson 1 Service Request Management challenges	1-3
Service Request Management challenges of IT	1-4
Service Request Management challenges of IT	1-5
Facing the challenges	1-6
Lesson 2 Industry standards	1-7
Based on best practices	1-8
IT Infrastructure Library	1-9
IBM and ITIL	1-10
Lesson 3 Tivoli's process automation engine	1-11
Overview of Tivoli's process automation engine	1-12
Four key components	1-13
Data integration	1-14
Lesson 4 IBM Control Desk	1-15
IBM Control Desk courses	1-16
Process content packs introduction	1-17
Process content packs overview	1-18
IBM Service Management process management	1-19
IBM Control Desk	1-20
Review questions	1-21
Review answers	1-22
Summary	1-23
Unit 2 Service management	2-1
Objectives	2-2
Lesson 1 IBM Service Management overview	2-3
Defining a service	2-4
Defining service management	2-5
IBM IT Service Management	2-6
Lesson 2 Service operation	2-7
Overview	2-8
Request fulfillment	2-8
Request fulfillment objectives	2-9
Service requests	2-9

Service request categories	2-10
Service request handling	2-10
Process flow key	2-11
Request fulfillment process overview	2-11
Incident management	2-12
Incident management process activities	2-12
Problem management	2-13
Problem management process diagram	2-13
Change management	2-14
Change	2-14
Simple change	2-15
Complex change	2-15
Lesson 3 Support levels overview	2-16
Support levels	2-17
Lesson 4 Tickets overview	2-18
Tickets	2-19
Ticket types	2-20
Ticket areas	2-21
Ticket lifecycle	2-22
Ticket applications	2-23
Lesson 5 Working with other management processes	2-24
Process managers	2-25
Process requests	2-26
Predefined process requests	2-27
Generic process requests	2-28
Review questions	2-29
Review answers	2-30
Summary	2-31

Unit 3 The Service Desk	3-1
Objectives	3-2
Lesson 1 Service Desk overview	3-3
Service Desk	3-4
Service Desk functions	3-4
Service Desk interactions	3-5
Lesson 2 The Service Requests application	3-6
The Service Requests window	3-7
Service Requests application tabs	3-8
Lesson 3 Looking for new tickets	3-9
My Work portlet	3-10
Service Desk Group Queue portlet	3-11
Service Requests record list	3-12
Basic search	3-13
Advanced search	3-14
Available queries	3-15
Lesson 4 Creating new service requests	3-16
Methods for creating service requests	3-17
Quick Insert portlet	3-18

Ticket templates	3-19
Quick Insert + ticket templates	3-20
Service Requests application	3-21
Duplicating tickets	3-22
Lesson 5 Filling out the service request	3-23
The service request form	3-24
Service Request section	3-26
Service Request identifier field	3-27
Owner or Owner Group field	3-28
Ticket ownership	3-29
Source field	3-30
Created By field	3-30
Status field	3-31
Ticket attachments	3-32
The document library	3-33
User Information section	3-34
Reported By and Affected Person fields	3-35
Additional user information	3-36
Service Request Details section	3-37
Summary and Details fields	3-38
Asset, Location, and Configuration Item fields	3-39
Intersection between assets and configuration items	3-40
Multiple assets, locations, and CIs	3-41
GL Account field	3-42
Asset Site field	3-43
Classification fields	3-44
Classification path	3-45
UNSPSC classifications	3-46
Selecting classifications	3-47
Attributes	3-48
Priority fields	3-49
Priority level values	3-50
The three types of priority level	3-51
How the internal priority is determined	3-52
Priority Matrix application	3-53
Impact + urgency = internal priority	3-54
Service group	3-55
Service	3-56
Vendor field	3-56
Site field	3-57
Create work order options	3-58
Response plans	3-59
Key Dates section	3-60
Service request templates	3-61
Lesson 6 Time management	3-62
Time management	3-63
Start and Stop timer	3-64
Confirming time spent	3-65

Lesson 7 Information locations overview	3-66
Information locations	3-67
Solutions	3-68
Frequently asked questions	3-69
Another ticket	3-70
Ticket attachment	3-70
External knowledge bases	3-71
Your or another agent or analyst's knowledge	3-71
Lesson 8 Searching for information	3-72
Searching for information: Methods	3-73
Search Solutions application	3-74
Solutions application	3-75
Solution information	3-76
Global Search application	3-77
Search scope	3-78
Search operators	3-79
Search results	3-80
Attachment hit indication	3-81
Solution result	3-82
Solution tracking	3-83
External knowledge base result	3-84
Other tickets	3-85
Similar tickets	3-86
Other tickets by the same person	3-87
Tickets that are related by service group	3-88
Tickets that are related by service	3-89
Lesson 9 Fulfilling the request	3-90
How agents fulfill the request	3-91
Providing information	3-92
Using another tool	3-92
Creating an incident ticket	3-93
Creating a process request	3-93
Process requests in use	3-94
Lesson 10 Communications	3-95
Communications overview	3-96
Email	3-96
Communication methods	3-97
Communication templates	3-98
Recipients	3-99
Logs	3-100
The communication log	3-101
The work log	3-102
Instant messaging	3-103
IMBot	3-104
IMBot benefits	3-105
Computer Telephony Integration (CTI)	3-106
The email listener	3-107
Lesson 11 Documenting the solution	3-108

Documenting the solution: Overview	3-109
Solution fields	3-110
Field formatting	3-111
Solutions that relate to other solutions	3-111
Lesson 12 Resolving tickets	3-112
Resolving versus closing	3-113
Deleting tickets	3-114
Lesson 13 The Incidents application	3-115
Incidents application window	3-116
Incidents application tabs	3-117
Lesson 14 Creating the incident ticket	3-118
Creating the incident ticket	3-119
Incident ticket template	3-120
Selecting a template	3-121
Applying a template	3-122
Lesson 15 Filling out the incident ticket	3-123
Defining the incident	3-124
Describing the incident	3-124
Automation tab	3-125
Failure Reporting tab	3-126
Failure reporting	3-127
Failure hierarchy	3-128
List failure codes	3-129
Creating a global issue	3-130
Lesson 16 Resolving the incident	3-131
Methods for resolving the incident	3-132
Transfer the ticket	3-133
Create an activity work order	3-134
Activity owners	3-135
Common activity statuses	3-136
Tasks	3-137
The Activities and Tasks application	3-138
Job plans	3-139
Applying a job plan to an activity	3-140
Lesson 17 The Problems application	3-141
The Problems application window	3-142
Problems application tabs	3-143
Lesson 18 Creating a problem ticket	3-144
Problem application window	3-145
Known error: Problem ticket	3-146
Problem ticket template	3-147
Review questions	3-148
Review answers	3-149
Student exercises	3-150
Summary	3-150

Unit 4 Service requests, incidents, and problems	4-1
Objectives	4-2
Lesson 1 Process flow	4-3
Service Desk process flow overview	4-4
Typical ticket flow	4-5
Three scenarios	4-7
Scenario 1: Requester does not know how to print document	4-8
Scenario 2: Requester receives error message #101	4-9
Scenario 3: Requester receives error message #102	4-10
Lesson 2 Request Fulfillment roles	4-11
Roles	4-12
Requester	4-13
Requester (Self Service Center user) Start Center	4-14
Service desk analyst	4-15
Service desk analyst Start Center	4-15
Service desk manager	4-16
Service desk manager Start Center	4-16
Service desk administrator	4-17
Service desk administrator Start Center	4-17
Lesson 3 Simple information request scenario	4-18
Simple information request scenario	4-19
Log in to the system	4-20
Create a service request	4-21
Take ownership	4-22
Start time tracking	4-23
Change status to show that the ticket is being worked on	4-24
Enter basic information	4-25
Inform the requester	4-26
Verify the resolution	4-26
Create a work log entry	4-27
Resolve the ticket	4-28
Stop the timer	4-29
Lesson 4 Solution lookup scenario	4-30
Solution lookup scenario	4-31
Perform initial steps	4-32
Search for the solution	4-33
Try the solution	4-34
Verify the resolution	4-35
Solution status	4-36
Perform closing steps	4-37
Lesson 5 Solution creation scenario	4-38
Solution creation scenario	4-39
Perform initial steps	4-40
Resolve the request	4-40
Create a solution	4-41
Perform closing steps	4-42
Lesson 6 Complex issue scenario	4-43
Receive the call	4-44

Perform initial steps	4-45
Ticket templates	4-46
Issue specific information	4-47
Initial investigation	4-48
Search existing solutions	4-49
Search for tickets	4-50
Global Search	4-51
Search results	4-52
Add a work log entry	4-53
Create an incident	4-54
View related records	4-55
Temporary jump to incident	4-56
Delegate the ticket	4-57
Person Groups tab	4-58
Incident ticket changes	4-59
Enter time	4-60
Lesson 7 Incident management overview	4-61
Incident	4-62
Major incident	4-62
Workarounds and fixes	4-63
Incident management basics	4-63
Incident management example	4-64
Incident management objectives	4-64
Lesson 8 Global issues	4-65
Global issue: Definition	4-66
Relating other records to global issues	4-66
Lesson 9 Event management	4-67
Event management basics	4-68
OMNIbus integration	4-68
Lesson 10 Incident roles	4-69
Incident management roles	4-70
Incident analyst	4-70
Incident analyst Start Center	4-71
Incident manager	4-71
Incident manager Start Center	4-72
Incident administrator	4-72
Incident administrator Start Center	4-73
Incident owner	4-73
Incident owner Start Center	4-74
Lesson 11 Incident management scenario	4-75
The incident team receives the incident ticket	4-76
Open the incident	4-76
Gather background information	4-77
View incident details	4-77
Check the logs	4-78
Look at related records	4-78
Define global issue	4-79
Search for similar tickets	4-79

The incident analyst's diagnosis	4-80
Provide the requester with a workaround	4-80
Create a solution specific to the incident	4-81
Create a general solution	4-81
Send a communication	4-82
Apply a template	4-82
Add a new work log entry	4-83
Create a problem ticket	4-83
Assign priority	4-84
Delegate the problem ticket	4-84
Resolve the incident ticket	4-85
Lesson 12 Problem management overview	4-86
Definition of a problem	4-87
Problems versus incidents	4-87
Reasons for distinguishing between incidents and problems	4-88
Definition of a major problem	4-88
Definition of a known error	4-89
Definition of problem management	4-89
Benefits of using problem management	4-90
Problem management versus incident management	4-90
Problem management example	4-91
Lesson 13 Problem management roles	4-92
Problem management roles	4-93
Problem analyst	4-93
Problem analyst Start Center	4-94
Problem manager	4-94
Problem manager Start Center	4-95
Problem administrator	4-95
Problem administrator Start Center	4-96
Problem owner responsibilities	4-96
Problem owner Start Center	4-97
Lesson 14 Problem management scenario	4-98
Problem analysts receive the problem ticket	4-99
Open the problem ticket	4-99
Gather background information	4-100
Diagnose the problem	4-100
Document the steps	4-101
Create the activity	4-101
Fix the problem	4-102
Complete the activity	4-102
Enter the solution information for this problem	4-103
Student exercises	4-103
Summary	4-104
Unit 5 The Service Catalog	5-1
Objectives	5-2
Lesson 1 Service Catalog overview	5-3
Half of the picture	5-4

The Service Catalog	5-5
The importance of having a Service Catalog	5-6
Structure	5-7
Service request changes	5-8
Lesson 2 The Service Catalog process	5-9
Service Catalog process diagram	5-10
Management approval	5-12
Lesson 3 Scenario	5-14
Locating an offering	5-15
Selecting an offering	5-16
Summary page	5-17
Shopping Cart application	5-18
Submitting the shopping cart	5-19
Line manager: Approval requested	5-20
Line manager: Approved	5-21
Fulfillment manager: Approval requested	5-22
Fulfillment manager: Approved	5-23
Service request	5-24
Service request: Activity work order	5-25
Operations analyst: Work order approval requested	5-26
Operations analyst: Work order approved	5-27
Work order: Tasks	5-28
Work order: Close	5-29
Review questions	5-30
Review answers	5-31
Student exercises	5-32
Summary	5-32
 Unit 6 Self-service	 6-1
Objectives	6-2
Lesson 1 Overview	6-3
Self-service definition	6-4
Lesson 2 Role	6-5
Self-service users	6-6
Self-service users' responsibilities	6-7
Lesson 3 Self-service tools	6-8
Self Service Center	6-9
Self Service Center menu	6-10
Search for Solutions	6-11
Report an Issue	6-12
Request a new Service	6-13
Frequent Requests	6-14
Create Request	6-15
Self-service user Start Center	6-16
View Service Requests application	6-17
Screen captures	6-18
Screen capturer	6-19
Lesson 4 Scenarios	6-20

Three scenarios	6-21
Scenario 1: Finding solutions by using self-service	6-21
Signing in to the system	6-22
Searching	6-23
Searching solutions	6-24
Viewing solution details	6-25
Rating the solution	6-26
Returning to the Start Center	6-27
Scenario 2: Creating a service request using self-service	6-28
Create a service request	6-29
Filling out the report	6-30
Submitting the service request	6-31
Checking status	6-32
Scenario 3: Creating a service request through email	6-33
Starting the mail reader	6-34
Creating and sending an email message	6-35
The service request is created	6-36
A reply is received	6-37
Lesson 5 Navigating the Service Portal	6-38
The Self Service Portal	6-39
Logging in to the Service Portal	6-40
User's Self Service Center	6-41
Agent's ticketing dashboard	6-42
Review questions	6-43
Review answers	6-44
Student exercises	6-45
Summary	6-46
Unit 7 Workflows	7-1
Objectives	7-2
Lesson 1 Overview	7-3
Definition of workflow	7-4
Workflow benefits	7-5
Workflow capabilities	7-6
Workflows included with IBM Control Desk	7-7
IBM Tivoli Unified Process links directly to workflow	7-8
Subflows	7-9
Escalations	7-10
Lesson 2 Workflow process maps	7-11
The workflow process map	7-12
Node types	7-13
Connection line types	7-14
Lesson 3 Task assignments	7-15
Definition of task assignment	7-16
Workflow and roles	7-17
Workflow Inbox/Assignments portlet	7-18
Viewing workflow assignments	7-19
Lesson 4 Routing workflow	7-20

Initiating a workflow	7-21
Workflow toolbar icons	7-22
Multiple applicable workflows	7-23
Manual Input window	7-24
Interaction window	7-25
Complete Workflow Assignment window	7-26
Reassigning tickets	7-27
Communication templates and workflow	7-28
Stopping a workflow	7-29
Previously started workflow processes	7-30
Lesson 5 Workflow actions	7-31
Workflow actions	7-32
Workflow history	7-33
Workflow Help	7-34
Lesson 6 Scenarios	7-35
Three scenarios	7-36
Scenario A: Service request successfully resolved	7-36
Scenario B: Service request unsuccessfully resolved	7-44
Scenario C: Handling an incident	7-50
Review questions	7-53
Review answers	7-54
Student exercises	7-55
Summary	7-55

Unit 8 Service level agreements.....	8-1
Objectives	8-2
Lesson 1 Overview	8-3
Service level agreements	8-4
Why SLAs are needed	8-5
Lesson 2 Commitments	8-6
Definition of a commitment	8-7
Commitment forms	8-8
Service level agreement example	8-9
Commitment points	8-10
Determining whether a commitment was met	8-11
Baseline dates	8-12
Target and Adjusted dates	8-13
Adjusted and Actual dates	8-14
Example: SLA was applied to a ticket	8-15
Example: Checking to see whether commitments were met	8-16
Lesson 3 Escalations	8-17
Overview of escalations	8-18
Escalation abilities	8-19
Escalations and SLAs	8-20
Escalation example	8-21
Lesson 4 Applying service level agreements	8-22
Applying SLAs: Methods	8-23
Notification that SLA has been applied	8-24

Verifying that an SLA has been applied	8-25
Multiple service level agreements	8-26
Determining when SLAs are in effect	8-27
SLA hold	8-28
Review questions	8-29
Review answers	8-30
Student exercises	8-31
Summary	8-31
Unit 9 Surveys	9-1
Objectives	9-2
Lesson 1 Measuring satisfaction	9-3
Assessing customer satisfaction	9-4
Survey timing	9-4
Survey types	9-5
Lesson 2 Survey forms	9-6
Tracked versus untracked survey forms	9-7
Tracked surveys	9-7
Untracked surveys	9-8
Lesson 3 Creating a survey	9-9
Survey creation overview	9-10
Create question-and-answer sets	9-11
Question details	9-12
Question attributes	9-12
Question order	9-13
Question weight	9-13
Create a survey template	9-14
Sample survey template	9-15
Create the survey	9-16
Assign a Maximo object to the survey	9-17
Tracked and untracked URLs	9-17
Assign questions	9-18
Apply a template	9-18
Preview the survey	9-19
Previewing tracked surveys	9-19
Previewing untracked surveys	9-20
Activate the survey	9-21
Lesson 4 Sending surveys	9-22
Methods for sending surveys	9-23
Survey communication templates	9-24
Manually sending a survey	9-24
Automatically sending a survey	9-25
Viewing the number of survey responses received	9-25
Taking a tracked survey	9-26
Taking an untracked survey	9-26
Viewing survey results	9-27
Associating a survey to a ticket	9-28
Review questions	9-29

Review answers	9-30
Student exercises	9-31
Summary	9-32
Unit 10 Reporting.....	10-1
Objectives	10-2
Lesson 1 Overview	10-3
Data analysis options	10-4
Reporting	10-5
The Report Administration application	10-6
Lesson 2 Running reports	10-7
Accessing reports: Reports link	10-8
Accessing reports: Navigation bar	10-9
Reports application tabs: On-demand reports	10-10
Request page	10-11
Request page: Parameters section	10-12
Request page: Schedule section	10-13
Request page: Email section	10-14
Reports application tabs: Scheduling Status	10-15
Lesson 3 Reports	10-16
Types of reports	10-17
Service Request reports	10-18
Incident reports	10-20
Problem reports	10-22
Solution reports	10-24
Service Level Agreement reports	10-25
Survey reports	10-26
Service Catalog reports	10-27
Review questions	10-28
Review answers	10-29
Student exercises	10-30
Summary	10-30

About this course

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IBM Control Desk 7.6 Service Request Management Fundamentals Course Guide

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

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

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

Details	
Delivery method	Classroom or instructor-led online (ILO)
Course level	ERC 1.0
	This course is an update of TP360, 8P360: IBM SmartCloud Control Desk 7.5 Fundamentals ERC1.0

Details	
Product and version	IBM Control Desk 7.6
Recommended duration	3 days
Skill level	Basic

Objectives

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

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

Audience

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

Prerequisites

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

Course description

The course contains the following units:

1. [Overview](#)

IBM Control Desk provides a wide range of functions. This unit provides an overview of the Service Desk and Service Management.

2. [Service management](#)

This unit covers service-related definitions and an introduction to service desk activities.

3. [The Service Desk](#)

This unit details the Service Desk, listing its functions and benefits. Details of how the Service Requests, Incidents, and Problems applications work are covered. Start Centers, searching for solutions, communications, and logs are also covered.

4. [Service requests, incidents, and problems](#)

This unit details service requests, incidents, and problems. Topics include the differences between the ticket types; the process flows involved in handling the tickets; and the roles involved.

5. [The Service Catalog](#)

This unit is about the Service Catalog, offerings, and shopping carts.

6. [Self-service](#)

This unit describes how requesters use the self-service tools.

7. [Workflows](#)

This unit defines workflows, shows how they are used in IBM Control Desk, and details scenarios in which they are used.

8. [Service level agreements](#)

This unit covers service level agreements (SLAs), including their purpose and use.

9. [Surveys](#)

With IBM Control Desk, you can create and send customer satisfaction surveys. This unit describes the various survey techniques and tools that you can use to create a survey.

10. [Reporting](#)

This unit provides an overview of the reporting capability in IBM Control Desk.

Unit 1 Overview

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1 Overview

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IBM Control Desk provides a wide range of functions. This unit provides an overview of the Service Desk and Service Management.

Objectives

- List at least three challenges that are faced by IT organizations
- List at least three features of IBM Control Desk that address these challenges
- Define IT Infrastructure Library® (ITIL®) and explain its relationship to IBM Control Desk
- Give an overview of IBM Control Desk service request management

Lesson 1 Service Request Management challenges

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Lesson 1 Service Request Management challenges

Overview

3

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This lesson provides reasons to perform Service Request Management functions.

After completing this lesson, you should be able to perform the following tasks:

- List business requirements of Service Request Management
- List IBM Control Desk solutions to those requirements

Service Request Management challenges of IT

IT organizations face similar challenges regardless of the business of their respective companies.

- Requests for services must be fulfilled.
- Interruptions in service must be addressed.
- Wide-spread or recurring problems must be fixed.
- Customer satisfaction goals must be met.

Service Request Management challenges of IT

Businesses of every size and type rely on information technology to keep their systems operational, but IT practices are common among all types of business. IT organizations around the world face similar help desk challenges every day. They keep vital systems and employees operational by eliminating obstacles, while maintaining customer satisfaction at the same time.

Service Request Management challenges of IT

- There are often restrictions on how these challenges are overcome.
 - Solutions must be delivered within a limited time frame.
 - Services must be available a certain percentage of the time.
 - Users must be able to solve their own problems.
- Data from the IT department is in demand.
 - Reports must be generated for management.
 - Solutions must be accessible to users.

Service Request Management challenges of IT

In addition to addressing these challenges, businesses must also consider restrictions. Solutions must be delivered within acceptable time frames and minimum uptime for services must be maintained. Limits on service desk staffing necessitate providing automated solutions that users can access themselves.

Management looks to IT departments for statistics about the operational efficiency of the IT infrastructure. Reports about how many and what types of problems users are having as they do their jobs must be generated so that solutions can be planned and tracked.

Providing a unified solution that is powerful, accessible, and efficient is the key to success.

Facing the challenges

IBM Control Desk provides the capabilities to manage these challenges by using proven industry standard techniques.

- The **Service Desk** addresses unexpected outages by providing service request, incident, and problem management.
- The **Service Catalog** and **Self Service** allow users to search for and order their own solutions to common issues.
- **Service Level Agreements** ensure that services are provided in a timely and effective manner.
- **Workflows** automate business processes to reduce errors and improve efficiency.
- **Surveys** measure customer satisfaction.
- **Reports** provide valuable insight to IT operations.
- **Integration** with other products to provide a complete solution.

Facing the challenges

IBM Control Desk is the solution that addresses these problems and more. The combination of the Service Desk with Service Catalog addresses the needs of Request Fulfillment, Incident management, and Problem management. Because these tools are built on the framework of Tivoli's process automation engine, automation, reporting, and integration with other systems is provided at a low level.

Lesson 2 Industry standards

IBM Training



Lesson 2 Industry standards

Overview

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This lesson describes IBM Control Desk's relationship to industry standards. After completing this lesson, you should be able to describe IBM Control Desk's relationship to ITIL and Tivoli® Unified Process.

Reference

ITIL Library

<https://www.ibm.com/developerworks/servicemanagement/>

Based on best practices

Built from the ground up on the IT Infrastructure Library (ITIL) framework, IBM Control Desk uses best practices from around the world.

Based on best practices

IBM Control Desk is designed from the start to use best practices throughout the business world, with the strongest consideration being ITIL compliance.

IT Infrastructure Library

- The IT Infrastructure Library (ITIL) is a set of concepts and policies for managing information technology (IT) infrastructure, development, and operations.
- ITIL describes many important IT practices with comprehensive check lists, tasks, and procedures that can be tailored to any IT organization.
- This library provides a cohesive set of best practices that are drawn from public and private sectors across the world.

IT Infrastructure Library

Think of the IT Infrastructure Library (ITIL) as a book that contains sections on each IT task. ITIL includes what many companies believe are the best ways to accomplish those tasks. ITIL is a framework of best practices, not a methodology. It describes only what must be done, not how to do it.

The latest version of ITIL is v3, released in 2007. It was updated in July 2011.

IBM and ITIL

- IBM initially contributed to ITIL, and continues to contribute as a developer, reviewer, and user of ITIL.
- The ITIL application management book, co-written by authors from IBM and other companies, is the basis for the lifecycle concept in ITIL Version 3. It lays the basic groundwork for how to integrate Service Management practices throughout the solution lifecycle.

Lesson 3 Tivoli's process automation engine

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Lesson 3 Tivoli's process automation engine

Overview

11

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This lesson introduces Tivoli's process automation engine.

After completing this lesson, you should be able to perform the following tasks:

- Explain what Tivoli's process automation engine is
- Describe the components of a Tivoli's process automation engine environment

Overview of Tivoli's process automation engine

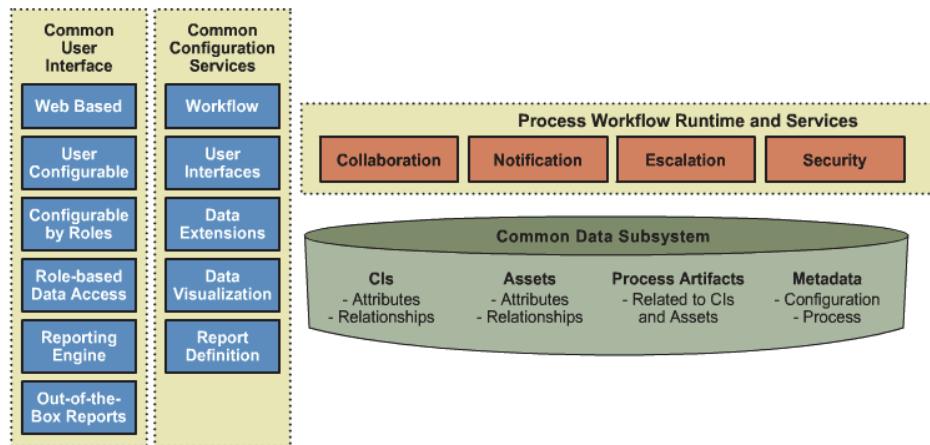
- **Tivoli's process automation engine** is a platform that is used to host IBM service management products.
- Tivoli's process automation engine provides these features:
 - A standards-based platform for processing data
 - Workflow services
 - Application design services
 - Work management services
 - Policy integration across IT management processes

Overview of Tivoli's process automation engine

The IBM service management platform is Tivoli's process automation engine. Many Tivoli process management products run on top of Tivoli's process automation engine. The engine provides the following common services for these products:

- **Data repository**: The engine provides a platform that can store information from the products in a common SQL-based data repository.
- **Workflow services**: Many business processes require information to be delivered to people who fill different roles in the organization. Using common workflow services that are provided by the engine, you can automate this process.
- **Application design services**: The engine provides a common facility that you can use to modify and extend applications in the various products. You can also write new applications.
- **Work management services**: The engine provides mechanisms for planning for tasks, assigning those tasks to employees, and tracking the time that is spent on those tasks.
- **Policy integration across IT management processes**: The engine provides security, classification, and other services that run across Tivoli process management products.

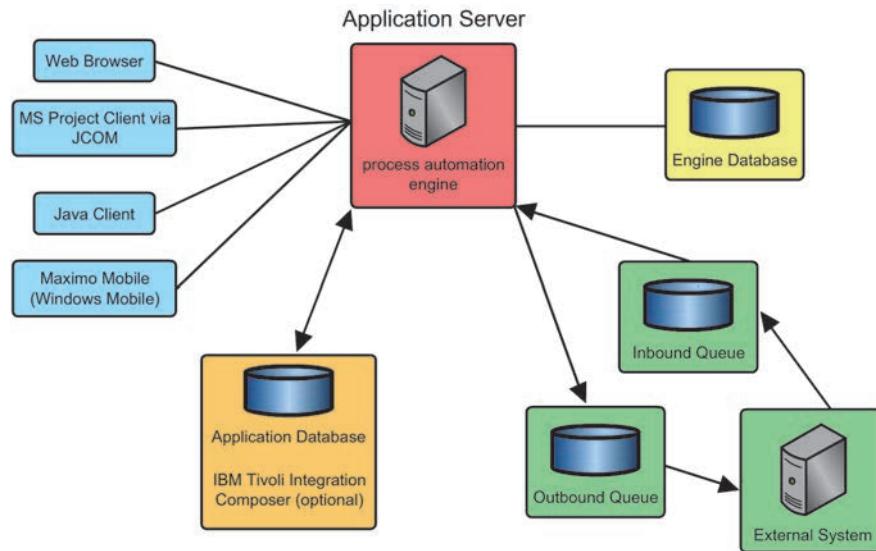
Four key components



Four key components

The four components use field-tested technology to create a platform for a service delivery environment.

Data integration



Overview

14

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Data integration

In a typical IBM Control Desk environment, a cluster of application servers handles incoming requests from various sources such as web browsers, automated services, and mobile clients. The application server stores information about the environment inside the engine database, which is also a cluster of servers that run DB2®, Oracle, or MS-SQL.

More data can be retrieved from external systems by using IBM Tivoli Integration Composer or by using Java queues. Detailed information on these processes can be found in the Tivoli's process automation engine Fundamentals course.

Lesson 4 IBM Control Desk

IBM Training



Lesson 4 IBM Control Desk

Overview

15

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This lesson covers where IBM Control Desk fits into the IBM Service Management picture and how you can use Process Content Packs to add value.

After completing this lesson, you should be able to perform the following tasks:

- Explain what Process Content Packs are and how they are used.
- Explain what processes IBM Control Desk Service Request Management handles from an ITIL perspective

IBM Control Desk courses



Overview

16

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IBM Control Desk courses

The Foundations class covers all aspects of IBM Control Desk at a high level, and has exercises that demonstrate integration between the components. Tivoli's process automation engine Fundamentals covers administration of the server and database, workflows, application designer, reports, and other features of the Tivoli's process automation engine framework that are not specific to IBM Control Desk.

Process content packs introduction

- Process content packs allow you to quickly apply prescriptive configurations for business processes to a new IBM Control Desk for quick time to value.

- Documentation is available from IBM developerWorks at the following website:

<https://www.ibm.com/developerworks/community/wikis/home?lang=en#!wiki/IBM%20SmartCloud%20Control%20Desk/page/Process%20Content%20Packs>

Process content packs introduction

Process content packs are a new way to get a fresh installation of IBM Control Desk that is quickly populated with industry best practices for quick time to value.

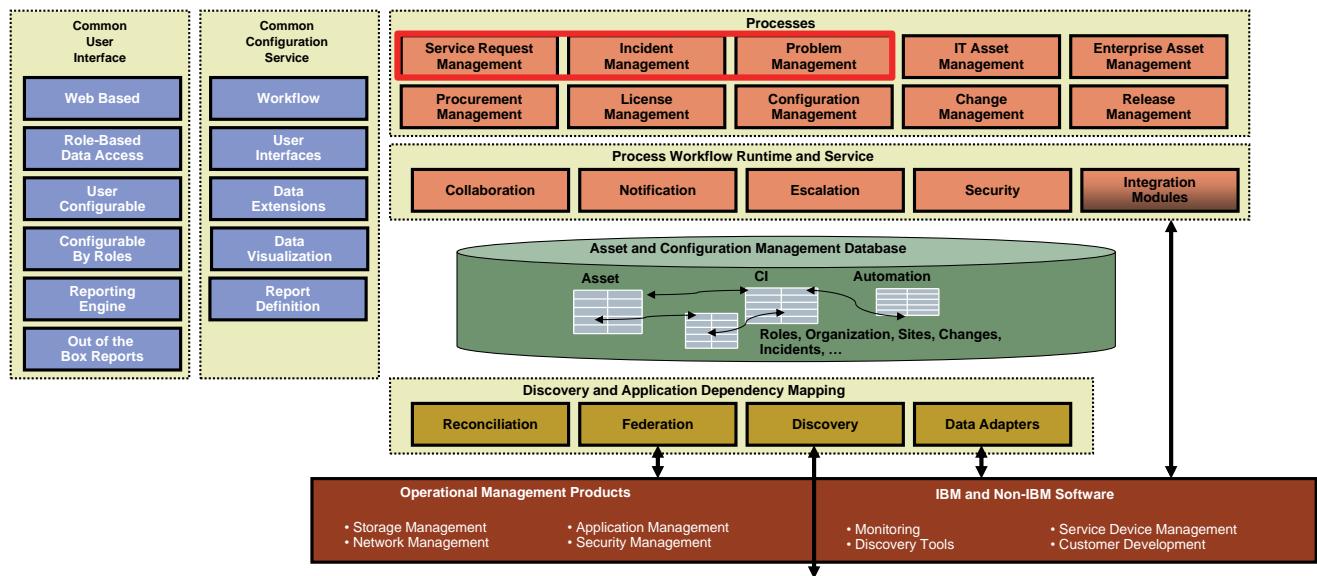
Process content packs are imported in new installations only and should not be applied to existing production environments. They will overwrite existing data.

Process content packs overview

Process content packs are built with ITIL guidelines and real-world best practices

- **Prepackaged content** for IBM Control Desk that allow processes to be rapidly deployed.
- Provide product configurations to support processes based on **IBM and industry recommendations** that can be deployed in minutes to dramatically reduce the **time to value**.
- Take advantage of key features and functions **reducing the reliance of consulting and/or deep product knowledge** for supporting successful deployments.
- **Includes detailed documentation** to reduce training, user documentation, and product adoption time.

IBM Service Management process management



Overview

19

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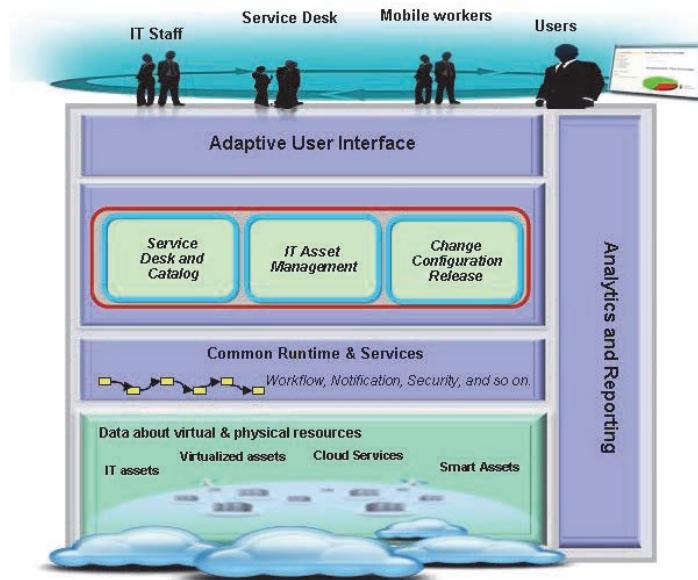
IBM Service Management process management

The IBM Service Management strategy is based on Tivoli's process automation engine. For Change and Configuration Management the Change and Configuration Process Managers provide the facilities to performing and managing the processes, and Tivoli Application Dependency Discovery Manager provides configuration and topology information for the resources in the IT infrastructure.

The two process managers are just a few of the process management components that plug in to this environment. Supplemental process managers include Incident, Problem, and Release management, to name a few.

The processes that are covered in this course are Service Request, Incident, and Problem Management.

IBM Control Desk



Overview

20

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IBM Control Desk

Review questions

1. What are some challenges faced by IT organizations? (List at least three)
 2. What three main processes do the Service Desk and Service Catalog address?

Review answers

1. What are some challenges faced by IT organizations? (List at least three)

*Service Requests must be fulfilled/
Interruptions in service must be addressed.
Widespread or recurring problems must be fixed.
Customer satisfaction goals must be met.*

2. What three main processes do the Service Desk and Service Catalog address?

*Request Fulfillment (or Service Request Management),
Incident Management, and
Problem Management.*

Summary

- List at least three challenges that are faced by IT organizations
- List at least three features of IBM Control Desk that address these challenges
- Define IT Infrastructure Library® (ITIL®) and explain its relationship to IBM Control Desk
- Give an overview of IBM Control Desk service request management

Unit 2 Service management

IBM Training

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2 Service management

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This unit covers service-related definitions and an introduction to service desk activities.

Objectives

- Define a service
- List the service request management processes that IBM Control Desk manages
- Describe the ticket lifecycle

Lesson 1 IBM Service Management overview

IBM Training



Lesson 1 IBM Service Management overview

Service management

3

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This lesson defines services and service management and shows how IBM performs service management.

After completing this lesson, you should be able to perform the following tasks:

- Define a service
- Define service management

Defining a service

- An offering, function, or activity delivered to an internal or external customer.
It might contribute revenue or complete a required task for an organization.
- Its output is created by using human, intellectual, financial, and physical assets.

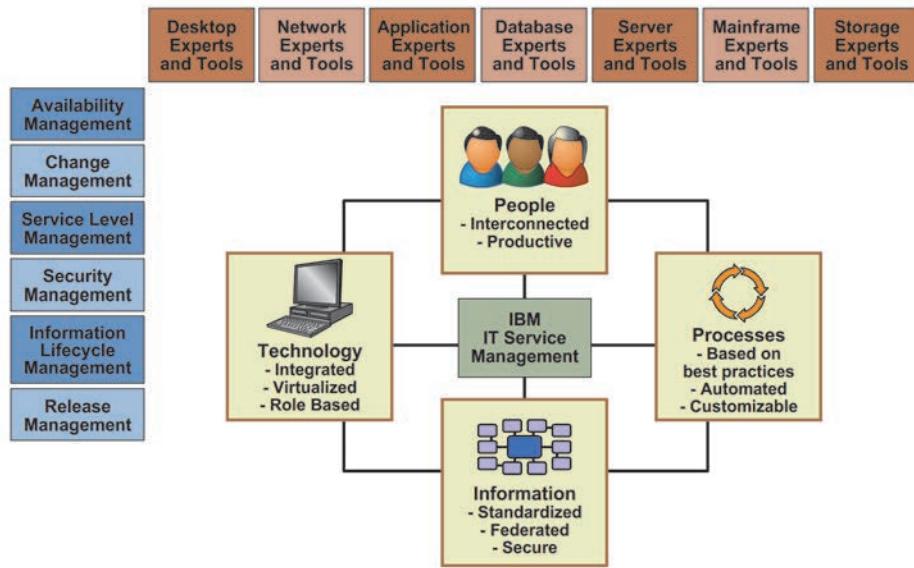
Defining a service

The service to be performed is not always clear at the beginning. For example, the service might be to replace toner in a printer. However, it might originate with a customer reporting an issue with faded text on printouts. An IT service is based on the use of information technology and supports the customer's business process.

Defining service management

- Encompasses the management processes, tactics, and best practices that are needed to deliver business services
- Is the alignment of IT and operation assets with wanted business outcomes

IBM IT Service Management



Service management

6

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IBM IT Service Management

IBM Service Management performs the following tasks:

- Encompasses the management processes, tactics, and best practices to deliver business services
- Involves developing, deploying, and managing services to help reduce IT and operations costs through automated processes and to more effectively manage compliance
- Pulls together critical components, such as people, processes, information, and technology, with an array of tightly integrated solutions

Lesson 2 Service operation

IBM Training



Lesson 2 Service operation

Service management

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After completing this lesson, you should be able to perform the following tasks:

- Define service operation
- List the service request management processes that IBM Control Desk manages

Overview

- **Service Operation** is the ITIL term for the collection of all service management processes.
- The three service request management processes that IBM Control Desk is involved with:
 - Request fulfillment
 - Incident management
 - Problem management

Request fulfillment

- **Request fulfillment** is the process of handling service requests from users.
- Its purpose is to receive service requests from users and route each request to the appropriate process for handling.
- Some service requests are handled by the request fulfillment process itself, whereas many others are routed to other processes for fulfillment.

Request fulfillment objectives

The objectives of the request fulfillment process include these tasks:

- Providing a channel for users to request and receive standard services for which a predefined approval and qualification process exists
- Providing information to users and customers about the availability of services and the procedure for obtaining them
- Sourcing and delivering the components of requested standard services
- Assisting with general information, complaints, or comments

Service requests

- A **service request** is a communication from an internal or external customer that reports an issue, asks for information, or requests a service.
- A service request ticket documents both the request and the requester's interaction with the Service Desk.
- Service requests provide a means of tracking all Service Desk interactions with customers, such as these examples:
 - Walk-up customers
 - Telephone calls
 - Email requests

Service request categories

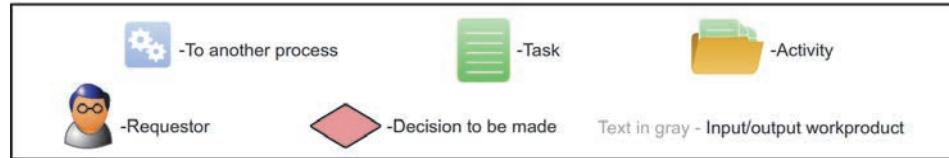
A service request can come in the following forms:

- Request for information
- Ask for help
- Request for advice
- Feedback
- Report of an incident
- Need for provisioning
- Service or item ordering
- Something else

Service request handling

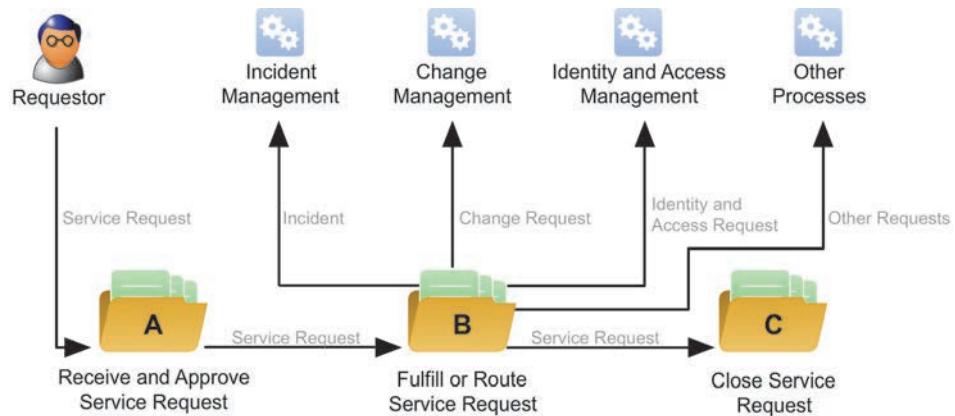
- The following types can be handled with only a service request:
 - Request for information
 - Ask for help
 - Request for advice
 - Feedback
- The following types need processing beyond that of a service request:
 - Report of an incident
 - Need for provisioning
 - Service or item ordering

Process flow key



Process flow key

Request fulfillment process overview

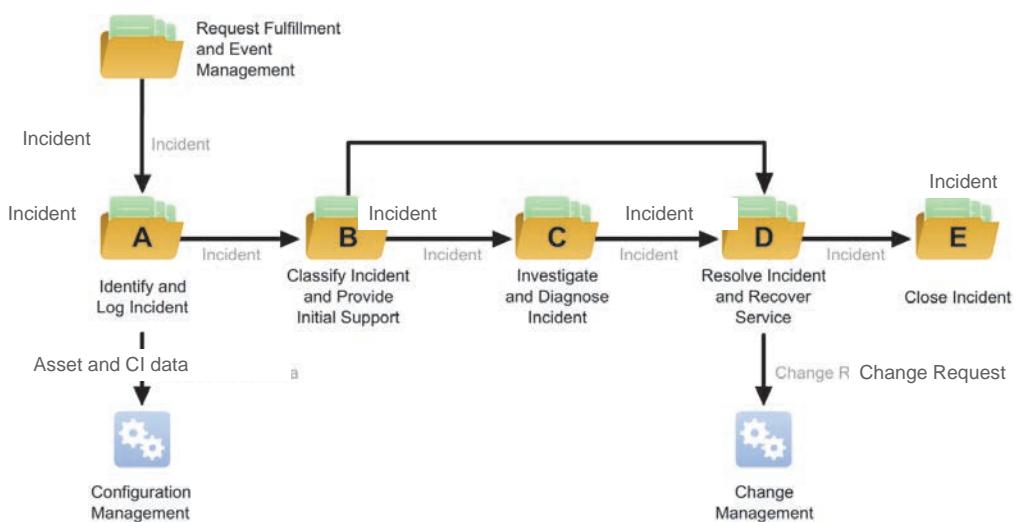


Request fulfillment process overview

Incident management

- **Incident management** concentrates on minimizing business impact by restoring unexpectedly degraded or disrupted services to users as quickly as possible.
- Incident management is often performed through workarounds or temporary fixes, rather than by trying to find a permanent solution.

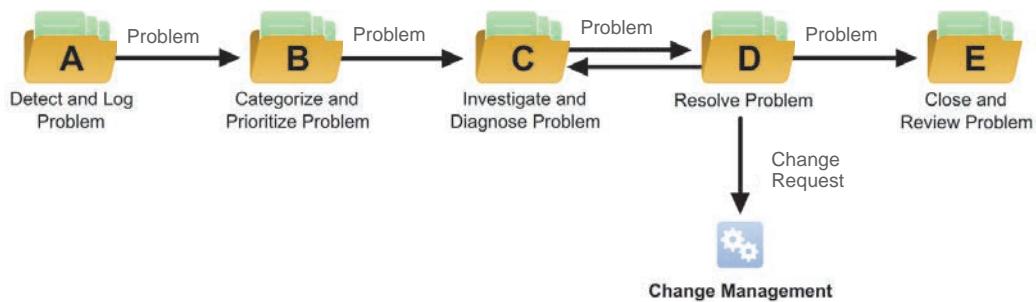
Incident management process activities



Problem management

Problem management is the process of diagnosing the root cause of an incident and arranging for a permanent correction.

Problem management process diagram



Change management

- Though usually not directly addressed in this class, change management is tightly related to service operation. IBM Control Desk provides robust change functionality.
- A **change** is an alteration that is made to an item that could affect production.
- **Change management** ensures that standardized methods and procedures are used for efficient and prompt handling of all changes.

Change

- It is important to understand the term *change* because different types of change are handled by using separate processes.
- A **change** is an action that results in a new status for one or more IT infrastructure assets.
- There are two types of changes:
 - Simple change
 - Complex change (or simply *change*)

Simple change

- A **simple change** is a preapproved change that is low risk and relatively common, and that follows a set procedure.
- Examples:
 - Password reset
 - Addition of user accounts for new employees
 - Replacement of printer supplies
- Simple changes are handled by the request fulfillment process and are logged and tracked by using a service request.

Complex change

- A **complex change** is one that is higher risk, not preapproved, or relatively uncommon, and might or might not follow a set procedure.
- Examples:
 - Replacing broken equipment
 - Installing security patches on an operating system
- Complex changes usually require the creation of a formal proposal. This proposal is a **change request**, also known as a **request for change** or **RFC**.
- These types of changes are handled by a separate process that is known as **change management**.

Lesson 3 Support levels overview

IBM Training

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Lesson 3 Support levels overview

Service management

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In this lesson, you learn about the levels of support in a service desk organization.

After completing this lesson, you should be able to perform the following tasks:

- List the levels of support
- Describe the differences between the levels

Support levels

- **Level (or tier) 1**
“Knows a little about a lot”
 - **Level 2**
“Knows slightly more about slightly less”
 - **Level 3**
“Knows a lot about a little”
-
- If the Level 1 individual cannot solve a problem, it is escalated to Level 2. If that level cannot solve the issue, it is escalated to Level 3.

Support levels

As the level increases, depth of knowledge increases while scope decreases. For maximum benefit, all issues should start at the lowest level and escalate when necessary.

Lesson 4 Tickets overview

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Lesson 4 Tickets overview

Service management

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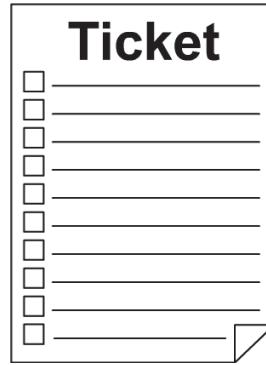
In this lesson, you learn about tickets and ticket types.

After completing this lesson, you should be able to perform the following tasks:

- Define what a ticket is
- List the types of tickets IBM Control Desk SRM works with
- Describe the ticket lifecycle

Tickets

A **ticket** is a collection of information that is contained within IBM Control Desk that relates to service issues.



Tickets

The term ticket originates from the small cards in a typical wall-mounted work planning system back when this type of support started.

Ticket types

There are three types of tickets: service request, incident, and problem:

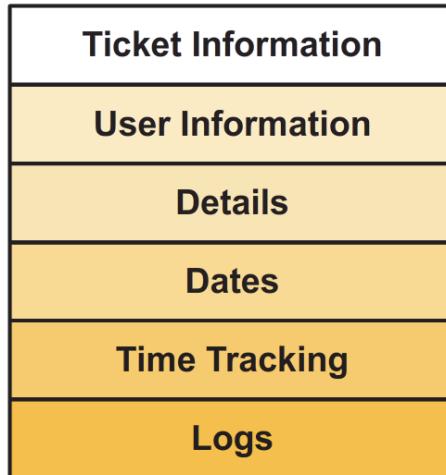
- A **service request** ticket documents the requester's interaction with the Service Desk and contains a request for some sort of service.
- The requested service might be to resolve incidents. **Incidents** are disruptions or potential disruptions in service availability or quality, and are tracked with an incident ticket.
- These incidents can stem from **problems**. A **problem** is the underlying cause of one or more incidents, and is then tracked with problem tickets.

Ticket types

The ticket applications are closely related and share many features. These features include the ability to perform the following tasks:

- Define relationships between tickets
- Link them together for information purposes
- View the linkages and details in the appropriate applications

Ticket areas

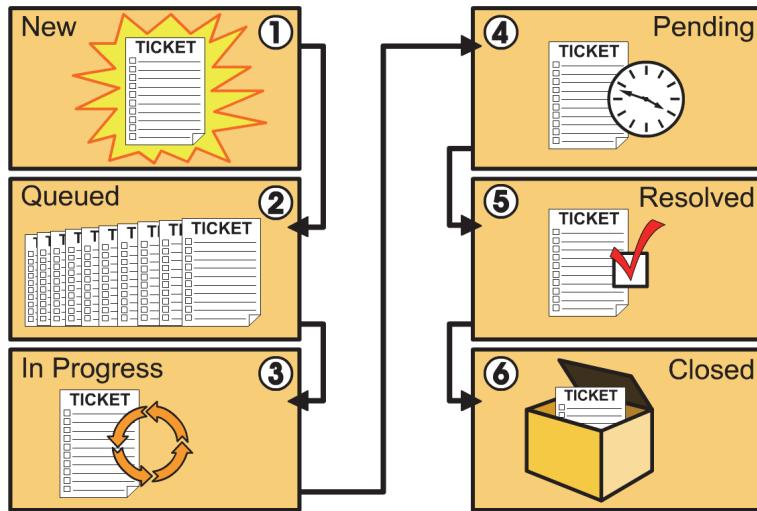


Ticket areas

Tickets have six main areas:

- **Ticket information:** General information about the ticket, such as the ticket number, who owns it, the status, the source, and who created the ticket.
- **User information:** Who reported the ticket, and who the ticket affects.
- **Details:** Information about what issue the ticket represents, its priority, its classification, and other details.
- **Dates:** Various time stamps that show when the ticket was created, when people were contacted, and other dates.
- **Time tracking:** Tracks the time various people spend working with the ticket.
- **Logs:** Records of events.

Ticket lifecycle



Ticket lifecycle

The lifecycles of most tickets follow the same order:

- **New**: A ticket is created. New is the default status for new tickets. Ticket status cannot be changed back to New after their status changes from New.
- **Queued**: The ticket that is transferred to a person or group, but work is not started.
- **In Progress**: Someone took ownership of the ticket and is working on it.
- **Pending**: The ticket is waiting for some external action, for example, response from requester, vendor response, parts on order.
- **Resolved**: The work is done, and the issue is resolved, or a solution or service was provided and the ticket is complete. If necessary, tickets can be reopened, and their status changed from Resolved back to Queued, In Progress, or Pending.
- **Closed**: The ticket becomes a history record and cannot change status again; however, the ticket can still be edited. All changes that are made on a history record are recorded.

Ticket applications

The screenshot shows the 'Service Requests' application interface. On the left is a navigation sidebar with links like 'Go To Applications', 'Available Queries', 'All Records', 'All Bookmarks', and various 'Open Service Requests' and 'Common Actions'. The main panel displays a 'View Record List > 1006' for a 'Service Request'. The record details include:

Service Request:	Owner:	Owner Group:
1006	[Redacted]	PIMSCOS
Catalog Request ID:	Source:	Created By:
1028	SERVICECATALOG	BOB

Below this is a section for 'Current Workflow Assignments' which states 'There are no workflow assignments.' Further down is a 'User Information' section with fields for 'Reported By' (set to 'BOB'), 'Name' (set to 'BOB'), 'Phone' (set to '713-297-7900'), and 'E-mail' (set to 'bob@ibm.com'). At the bottom is a 'Service Request Details' section.

Ticket applications

Tickets are accessed through applications. Each ticket type has a corresponding application.

Lesson 5 Working with other management processes

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Lesson 5 Working with other management processes

Service management

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After completing this lesson, you should be able to perform the following tasks:

- Define process manager
- Define process request
- Define generic process request

Process managers

A **process manager** provides software controls that ensure adherence to the rules and procedures (the process) designed by the company or organization to safely handle changes that affect the IT environment.

Process managers

IBM Control Desk is a process manager for request fulfillment, incident, and problem management, and also change and release management.

When process managers are installed together, they integrate to provide a level of coordination between related functions. The mechanism by which these products work together is an entity that is known as a process request.

Process requests

- A **process request** can be thought of as a ticket with a written note on it that is forwarded to various people (or entities) requesting them to perform various actions, resulting in the objective of the process.
- Create a process request when resolution or investigation of the issue that is described in a ticket record requires the control of another management process.
- There are two types of process requests:
 - Generic
 - Predefined

Predefined process requests

- Beyond service request, incident, and problem, IBM Control Desk has two other predefined request types: **change** and **release**.
- Requests of these types are handled in a manner similar to service request, incident, and problem tickets. For example, a change process request is sent to the change department. If the change department accepts the request, a change record is created and the change process continues from there.

Predefined process requests

Here are examples of these types of processes:

- Changing the IT environment through a complex change (change management)
- Managing configuration items (configuration management)
- Rolling out new software and related hardware (release management)

Generic process requests

- A **generic** process request is one that has no process manager type.
- Use a generic process request when a company has unique internal processes, such as an approval process for all expenses.
- You can then use other processes without having specific process managers installed.

Review questions

1. What is a service?
2. What three service request management processes is IBM Control Desk involved with?
3. At what point in the ticket lifecycle has the ticket's issue been corrected or worked around?

Review answers

1. What is a service?

A service is an offering, function, or activity that is delivered to an internal or external customer. It might contribute revenue or complete a required task for an organization.

2. What three service request management processes is IBM Control Desk involved with?

Request fulfillment, Incident management, and Problem management.

3. At what point in the ticket lifecycle has the ticket's issue been corrected or worked around?

Resolved.

Summary

- Define a service
- List the service request management processes that IBM Control Desk manages
- Describe the ticket lifecycle

Summary

Unit 3 The Service Desk

IBM Training

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3 The Service Desk

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This unit details the Service Desk, listing its functions and benefits. Details of how the Service Requests, Incidents, and Problems applications work are covered. Start Centers, searching for solutions, communications, and logs are also covered.

Objectives

- Navigate the classroom environment to log in, create service requests and search for solutions
- Take ownership of a service request, change the SR's status and resolve the ticket
- Create entries in the solution application to build the knowledge base within IBM Control Desk
- Transfer a service request to another resolver
- Use the data in an existing service request to create an incident within Control Desk

Lesson 1 Service Desk overview

IBM Training

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Lesson 1 Service Desk overview

This lesson provides an overview of the Service Desk.

After completing this lesson, you should be able to perform the following tasks:

- Describe the Service Desk, listing its functions and benefits.
- Explain the general process flow that is used by the Service Desk.
- List the methods of communication that is used by the Service Desk.

Service Desk

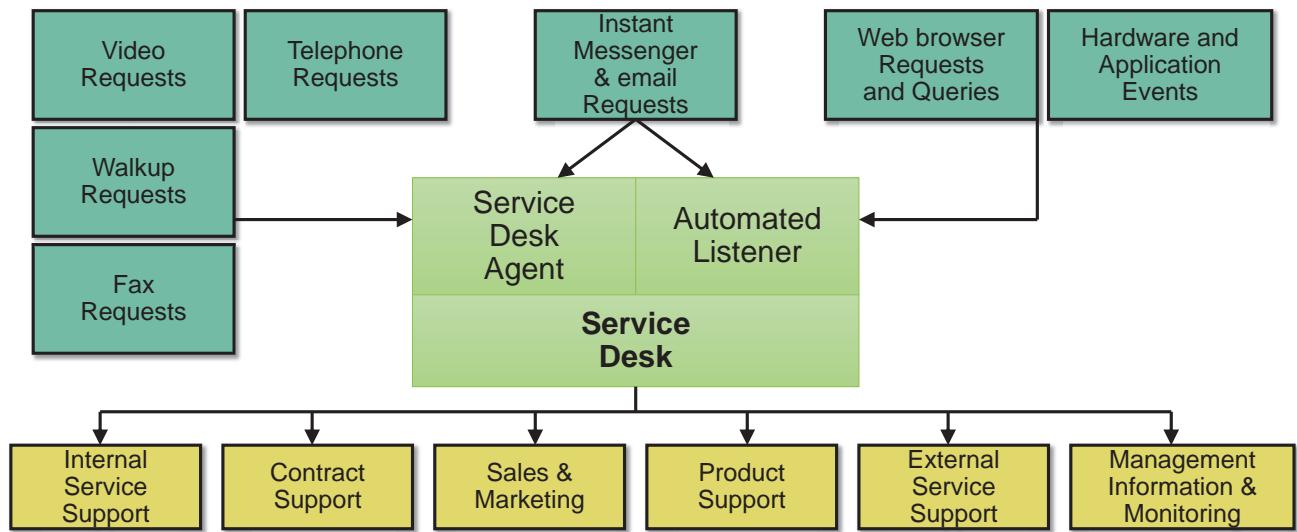
- The Service Desk is a central point of contact between service providers and users daily.
- It is where users can report issues, ask for information, and request services.
- It facilitates the restoration of normal operational service with minimal business impact on the customer within agreed-upon levels and business priorities.
- With the Service Desk, users can report issues and request services.

Service Desk functions

Common Service Desk functions include the following examples:

- Receiving calls, acting as a first-line customer liaison, and dealing directly with simple requests and complaints
- Keeping customers informed on request status and progress
- Making an initial assessment of requests, attempting to resolve them or to refer them to someone who can
- Providing initial assessment of all incidents; making first attempt at incident resolution, referral to second-line support, or both, based on agreed-upon service levels
- Coordinating second-line and third-line support

Service Desk interactions



Service Desk interactions

Information gets to the Service Desk from different sources, and different organizations use the outputs for many purposes. Outputs can be in the form of actions, alerts, email communications, and reports.

Lesson 2 The Service Requests application

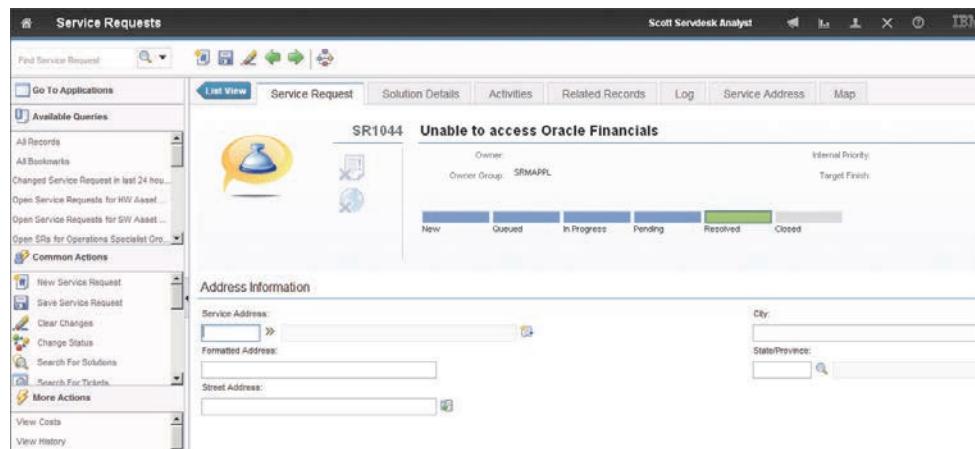
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Lesson 2 The Service Requests application

This lesson covers the Service Requests application. After completing this lesson, you should be able to describe what each of the tabs in the application does.

The Service Requests window



The Service Requests window

Tickets are accessed through applications. Each ticket type has a corresponding application.

Service Requests application tabs



Service Requests application tabs

The Service Requests application contains the following tabs:

- **List** to search for service requests.
- **Service Requests** to create, modify, view, and delete identifying information for the service request.
- **Activities** to show activities (work being done) related to the request.
- **Related Records** to relate, view, and navigate relationships between service requests, incidents, problems, and other records.
- **Solution Details** to add or view solution information for this record.
- **Log** to create, view, modify, or delete work log entries, and to view communication log entries.
- **Specifications** to classify a service request and specify attributes to define it further. For example, a service request might involve the classification of a computer, with attributes of memory, disk space, and speed, for which you can define values. Attributes help categorize service requests, making it easier to find and manage service requests.

Lesson 3 Looking for new tickets

IBM Training

IBM

Lesson 3 Looking for new tickets

In this lesson, you explore ways to find tickets that need to be worked. After completing this lesson, you should be able to describe six ways of searching for tickets.

My Work portlet

My Work						
Record	Class	Priority	Description	Reported Date	Status	
SR1044	SR		Unable to access Oracle Financials	3/15/11 16:15:49	RESOLVED	
SR1054	SR	1	Slow responses on all apps	3/17/11 11:02:15	INPROG	
SR1055	SR	3	Slow response in OraFin and email	3/17/11 11:06:52	INPROG	
SR1064	SR	2	Can not reach Oracle Financial web site	3/18/11 10:43:36	PENDING	
TUSC1179	ACTIVITY	2	App Support Server RT23411 has a batch file that has abended, Please research and support	12/15/11 09:59:23	COMP	
TUSC1013	PROBLEM	4	Oracle system appears to be down - website error 404	12/16/11 11:03:45	PENDING	
TUSC1031	PROBLEM	4	Oracle system appears to be down - website error 404	12/19/11 14:28:22	PENDING	
TUSC1033	PROBLEM	3	Oracle system appears to be down - website error 404	12/19/11 14:28:25	PENDING	
1010	SR	4	print from Notepad	5/14/13 21:20:35	RESOLVED	
1011	SR	2	Slow network	5/14/13 23:26:49	RESOLVED	

[Set Graph Options](#)

1 - 10 of 13 | [Next Page >>](#)

My Work portlet

The My Work portlet on the Start Center shows all tickets that are owned by the agent. Selecting a ticket opens the corresponding ticket application with the ticket loaded and ready for editing.

Service Desk Group Queue portlet

Service Desk Group Queue					Filter			
Service Request	Class	Summary	Status	Creation Date				
SR1337	SR	Cannot resolve network password issue	NEW	9/13/11 16:38:26				
SR1388	SR	Air Conditioner broken on 1st floor	NEW	10/10/11 17:18:10				
SR1269	SR	Firewall Change Requests	NEW	2/19/12 12:52:16				
SR1325	SR	Request PC	NEW	8/10/11 13:28:49				
SR1039	SR	Security intrusion Alert on Several PCs at Site 156	NEW	3/14/11 15:03:04				
SR1057	SR	Error when installing software	NEW	3/17/11 11:57:34				
SR1216	SR	New Asset Request	INPROG	6/2/11 16:51:37				
SR1106	SR	New Asset Request	INPROG	4/27/11 16:21:07				
SR1263	SR	New Asset Request	INPROG	7/15/11 12:52:30				
SR1326	SR	Cisco 6500 switch needed ASAP , like now	INPROG	8/10/11 13:50:57				

[Set Graph Options](#) 1 - 10 of 18 | [Next Page >>](#)

Service Desk Group Queue portlet

Tickets in the group queue are visible by all members of the group. After a member of the group takes ownership of the ticket, it is removed from the group queue.

Service Requests record list

More information'."/>

Service Request	Summary	Reported By	Customer	Internal Priority	Priority	Status	Owner
1002	Build New Server with Middleware	BOB		4		INPROG	NANCY
1010	print from Notepad	BOB		4	3	RESOLVED	SCOTT
1011	Slow network	STEVE		2		RESOLVED	SCOTT
1012	Printing from PayrollMaster	BOB		2	2	RESOLVED	SCOTT
1013	User requires a new desktop computer	STEVE		1	3	INPROG	SCOTT
1014	Request Facility Access	FRED		1	2	INPROG	NANCY
1015	Notebook computer running slowly	BOB		1	1	RESOLVED	SCOTT
1016						NEW	
1022	Build New Server with Middleware	BOB				QUEUED	NANCY
1023	Network Connectivity	BOB			2	QUEUED	SCOTT

Service Requests record list

You can filter tickets in the record list from the main screen with a basic search or with the Advanced Search feature.

Basic search

Advanced Search | Save Query | Bookmarks

Use this application to view, create and modify service request records. To show My Location on the map, you need to allow the browser to share your location with the server. After the permission is given, click the refresh button. Only the records which have the service address defined will be shown on the map. [More Information](#)

List Map - Side by Side Map - Below

Service Requests Filter > 1 - 20 of 52

Service Request	Summary	Reported By	Customer	Internal Priority	Priority	Status	Owner
1002	Build New Server with Middleware	BOB		4		INPROG	NANCY
1010	print from Notepad	BOB		4	3	RESOLVED	SCOTT
1011	Slow network	STEVE		2		RESOLVED	SCOTT
1012	Printing from PayrollMaster	BOB		2	2	RESOLVED	SCOTT

Basic search

Basic searches use only the fields that are listed in the results view (Service Request #, Summary, Reported By, Internal Priority, Status, and Owner Group). Basic searches are technically filtering rather than searching, but the result is the same.

Advanced search

More Search Fields| Current Query:

Service Request: <input type="text"/>	Service Group: <input type="text"/> >>	Status: <input type="text"/>
Summary: <input type="text"/>	Service: <input type="text"/>	Site: <input type="text"/>
Asset: <input type="text"/> >>	Vendor: <input type="text"/> >>	History? <input type="text"/>
Asset Site: <input type="text"/>	Reported By: <input type="text"/> >>	Internal Priority: <input type="text"/>
Location: <input type="text"/> >>	Owner: <input type="text"/> >>	Originating Record: <input type="text"/> >>
Configuration Item Number: <input type="text"/> >>	Owner Group: <input type="text"/> >>	Orginal Record Class: <input type="text"/>
Classification: <input type="text"/> >>	Customer: <input type="text"/> >>	External Record: <input type="text"/>
	Agreement: <input type="text"/> >>	Response Plan: <input type="text"/> >>

Dates

Reported Date	From <input type="text"/>	To <input type="text"/>	Affected Date	From <input type="text"/>	To <input type="text"/>
Target Contact	<input type="text"/>	<input type="text"/>	Actual Contact	<input type="text"/>	<input type="text"/>

Advanced search

Clicking **Advanced Search** provides many more fields to search on. Here you can search on dates, the name of the person that is affected by the issue, the reported priority, and more.

Available queries

The screenshot shows the 'Available queries' page in the IBM Service Desk. On the left, a navigation bar lists various service requests, with 'All Records' selected. Below this are sections for 'Common Actions' and 'More Actions'. The main area displays a table of service requests with columns for 'Service Request', 'Summary', and 'Reported By'. The table contains 12 rows, each representing a different service request. The first row, '1002', is highlighted.

Service Request	Summary	Reported By
1002	Build New Server with Middleware	BOB
1010	print from Notepad	BOB
1011	Slow network	STEVE
1012	Printing from PayrollMaster	BOB
1013	User requires a new desktop computer	STEVE
1014	Request Facility Access	FRED
1015	Notebook computer running slowly	BOB
1018		
1022	Build New Server with Middleware	BOB
1023	Network Connectivity	BOB
1024		BOB

Available queries

The left navigation bar provides quick access to common queries. Clicking a query shows the records that meet those criteria.

Lesson 4 Creating new service requests

IBM Training



Lesson 4 Creating new service requests

This lesson is about creating Service Request tickets. After completing this lesson, you should be able to list four ways of creating an SR ticket.

Methods for creating service requests

There are multiple ways to create a service request ticket:

- Quick Insert (Lite or Full)
- Quick Insert + templates
- Service Requests application
- Duplicating an existing ticket

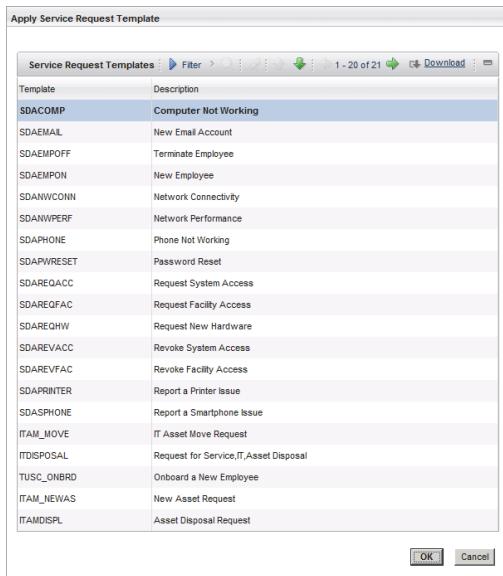
Quick Insert portlet



Quick Insert portlet

Click the **New Service Request** selection in the Start Center's Quick Insert portlet to open the Service Requests application and create a service request.

Ticket templates



Ticket templates

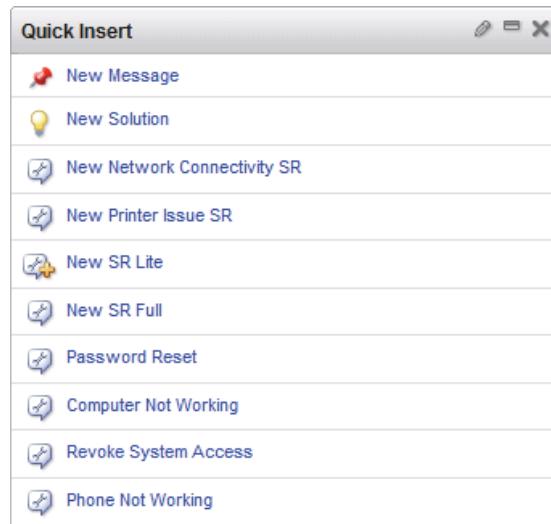
Ticket templates are used to create and manage prepopulated tickets. Service Desk environments can use these templates to standardize common or high-volume service requests, incidents, or problems. A ticket template can include response activities and an owner or owner group who assumes responsibility for the ticket.

Using templates reduces the time Service Desk agents spend on data entry and provides a planned response to high-volume calls.

When using ticket templates, a new ticket is created in the standard way, and then the template is applied to it. After a template is used, the information from the template can be modified as needed.

For example, assume that the Service Desk receives a large quantity of requests to reset user passwords. An administrator creates a ticket template to handle these common service requests. When a request for password reset is received, the agent creates a new service request and applies the Password Reset ticket template. The ticket is then automatically categorized. The internal priority is set, and any other predefined values in the record's fields are supplied. Moreover, a series of predefined steps always occurs to support password resets. Therefore, these activities can be created or existing job plans can be used and included on the template.

Quick Insert + ticket templates



Quick Insert + ticket templates

In addition to creating a service request, the Quick Insert portlet can immediately apply a ticket template to the service request. With this method, you can rapidly create a specific type of service request ticket. This method is mostly used for common service requests.

Service Requests application

The screenshot shows the 'Service Requests' application interface. On the left, there's a sidebar with sections for 'Available Queries' (listing 'All Records', 'All Bookmarks', 'Changed Service Request in last 24 hours...', 'Open Service Requests for HW Asset M...', 'Open Service Requests for SW Asset M...', 'Open SRs for Operations Specialist Gro...', and 'All late service requests') and 'Common Actions' (listing 'New Service Request', 'Change Status', and 'Print'). The 'New Service Request' button is highlighted with a red box. The main area has a toolbar with icons for search, save, and other actions. Below the toolbar, there's a message: 'Use this application to view, create and modify service request records. To show click the refresh button. Only the records which have the service address defined'. At the bottom of the main area, there are three buttons: 'List', 'Map - Side by Side', and 'Map - Below'. The main table is titled 'Service Requests' and has columns 'Service Request' and 'Summary'. There are also buttons for 'Filter', search, and other actions.

The Service Desk

22

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Service Requests application

Click the New Service Request icon to create a new blank service request. When a ticket is created using this method, an initial window gathers important information about the ticket before Control Desk displays the full record. This window assists service desk agents in quickly populating tickets without having to navigate the full details page to enter basic information.

Duplicating tickets

- The Duplicate Service Request menu item makes a copy of an open service request.
- Duplication is an efficient way to create a new ticket. When a ticket is duplicated, the system copies all of the information from the existing ticket except for items that are specific to the ticket that is being copied.

Lesson 5 Filling out the service request

IBM Training

IBM

Lesson 5 Filling out the service request

In this lesson, you learn how to enter data into an SR ticket. After completing this lesson, you should be able to describe all the fields of an SR ticket.

The service request form

The screenshot shows a service request record for ticket number 1002. The title of the ticket is "Build New Server with Middleware". Key details include:

- Owner: NANCY
- Owner Group: [empty]
- Internal Priority: 4
- Created By: BOB
- Status: In Progress
- Approval status: Approved by Line Manager, Approved by Fulfillment Manager, Approved, Queued

The form is divided into sections:

- Address Information:** Fields for Service Address, Formatted Address, Street Address, City, and State/Province.
- User Information:** Fields for Reported By and Affected Person.

The service request form

As you can see, a new service request contains many fields that must be completed correctly.

Enter the following information into all service request tickets:

- Service Request
- Service Request Identifier
- Owner or Owner Group
- Source
- Created By
- Status
- Attachments
- User Information
- Reported By
- Affected Person
- Service Request Details
- Summary
- Details
- Asset or Configuration Item information
- Classification

- Priority
- Service and Service Group
- Vendor
- Site
- Dates
- Reported Date
- Affected Date
- Creation Date
- Service Request identifier
- Owner or Owner Group
- Source
- Created By
- Status
- Attachments

Service Request section



Service Request identifier field

- The Service Request identifier field contains information that identifies the service request. It is usually automatically generated and can start with a prefix.
- Identifier fields can look like the following examples:

1001

1002

1003

SRM0001

SRM0002

SRM0003

Service Request identifier field

The identifier must be unique.

Owner or Owner Group field

- The owner of a service request ticket is the person or group that is in charge of the record from an administrative perspective. The owner keeps the customer updated and acts as the contact person for any issues that involve the work.
- The term owner represents a single person who is handling a ticket.
- An owner group is a group within the organization that is assigned responsibility for a ticket.

Owner or Owner Group field

Owner groups can be associated with classifications. In this case, when a classification is chosen, it populates the **Owner Group** field.

For example, the IT group might be assigned to a ticket that involves providing a computer to a new employee. Either the **Owner** or the **Owner Group** field is populated, but not both.

Ticket ownership

The screenshot shows the IBM Service Desk Analyst interface with the following components:

- Quick Insert:** A sidebar with icons for New Message, New Solution, New SR List, New SR Full, Password Reset, Computer Not Working, Revolve System Access, Phone Not Working, and New Printer Issue SR.
- Bulletin Board:** A panel showing "There are currently no bulletin board messages to view."
- Inbox / Assignments:** A panel showing "No Assignments found for Scott Servdesk Analyst"
- My Work:** A table listing tickets with columns: Record, Class, Priority, Description, Reported Date, and Status. The data is as follows:

Record	Class	Priority	Description	Reported Date	Status
SR1041	SR	1	Unable to access Oracle Financials	20/11/11 16:18:48	RESOLVED
SR1044	SR	3	Slow response on all sites	20/11/11 16:18:45	RESOLVED
SR1055	SR	3	Slow-response in Oracle and email	3/12/11 11:06:52	INPROG
SR1094	SR	2	Can not reach Oracle Financial web site	3/12/11 10:43:38	PENDING
TUSC1179	ACTIVITY	2	App Support Server RT23M11 has a batch file that has stalled, Please research and support	12/12/11 09:59:23	COMP
TUSC1013	PROBLEM	4	Oracle system appears to be down -website error 404	12/12/11 11:00:46	PENDING
TUSC1031	PROBLEM	4	Oracle system appears to be down -website error 404	12/12/11 14:28:22	PENDING
TUSC1033	PROBLEM	3	Oracle system appears to be down -website error 404	12/12/11 14:28:25	PENDING
1010	SR	4	print from Notepad	8/12/11 21:20:35	RESOLVED
1011	SR	2	Slow network	8/12/11 22:26:49	RESOLVED

The Service Desk

29

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Ticket ownership

Individuals or groups can assume responsibility for, or ownership of, a ticket. When a group owns a ticket, all members of the group see the ticket in their Service Desk Group Queue portlet. Any individual member can then take ownership of the ticket. When ticket ownership changes from a group to an individual, the ticket is no longer displayed in the group queue of other group members.

When you begin work on a service request, the agent takes ownership of the ticket. Taking ownership prevents other people from attempting to work on the ticket concurrently.

When an agent takes ownership of a ticket, that agent is responsible for managing the ticket until either of the following events occurs:

- It is resolved.
- The ticket is delegated to another group or person because:

A more knowledgeable or technical group must address the issue.

A service level agreement calls for escalation of the ticket to a different group if it is not resolved within a certain period.

Source field

Indicates how an issue was reported:

- Telephone call
- Walk-up
- Email
- Instant messaging
- Self-service
- Event management
- Service Catalog
- Interesting report (The issue resulted from viewing a report)
- External Service Desk

Created By field

- Specifies the person who created the ticket.
- This field is populated automatically when the ticket is created.

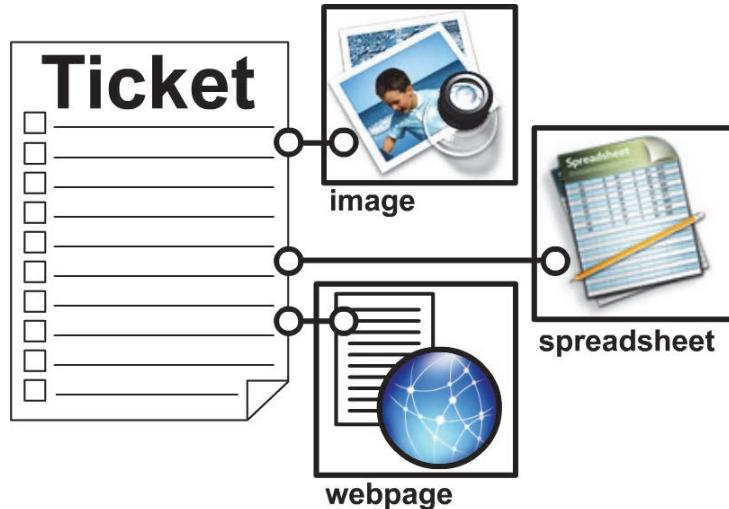
Status field

- New (default status): A ticket has been created. Tickets cannot have their status changed back to New after their status has been changed from New.
- Queued: The ticket has been transferred to a person or group but work has not yet begun.
- In Progress: Someone has taken ownership of the ticket and is working on it.
- Pending: The ticket is waiting for some external action (for example, response from user, vendor response, or parts on order).
- Resolved: The work is completed, the issue is resolved, or a solution or service has been provided and the ticket is complete. If necessary, tickets can be reopened and have their status changed from Resolved back to Queued, In Progress, or Pending.
- Closed: The ticket becomes a history record and cannot have its status changed again; however, the ticket can still be edited. All changes made on a history record are recorded.

Status field

When the status of a ticket is changed, the date and time of the status change are recorded. The agent can also record a memo that explains the reasons behind the change.

Ticket attachments

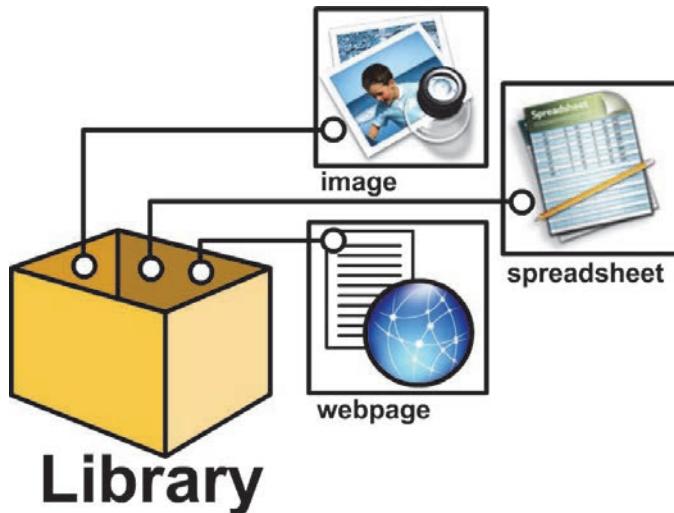


Ticket attachments

Files can be attached to tickets. Many types of information can be attached to a ticket, including images, spreadsheets, and web pages.

Attachments added to a new ticket typically consist of screen captures that show the reported issue. They can also contain some other information that can help describe the issue or request.

The document library



The document library

Not all attachments are coming into the Service Desk from requesters. Attachments can also go out to requesters from the Service Desk.

Control Desk supports the concept of a document library. A document library is a collection of folders that contain attachments to be sent out from the Service Desk. For example, there might be a standard security letter for all users who receive new computers.

User Information section

User Information

Reported By:	Affected Person:
<input type="text"/> >>	<input type="text"/> >>
Name	Name
<input type="text"/> >>	<input type="text"/> >>
Customer:	
<input type="text"/> >> <input type="text"/> >>	

User Information section

Two fields hold user names. These fields can be different, depending on the situation where the ticket was opened.

- Reported By
- Affected By

Reported By and Affected Person fields

- **Reported By:** Identifies person who is making the service request
- **Affected Person:** Identifies person who is affected by the issue

Reported By and Affected Person fields

When you enter information for any of the user fields, the related fields are automatically populated with information from the person record, if it exists. For example, assume that you enter a valid telephone number for the person that reports the incident. The system enters the corresponding user name in the **Reported By** field, full name, and email address.

After you enter information in the **Reported By** fields, all of the **Affected Person** fields are filled with the same information. You can then change the Affected Person information if the affected person is different from the Reported By user.

After you enter information in the **Affected Person** fields, the **Asset Site** field is populated with the site that is listed in the person record of the affected user.

Additional user information

User Information

Reported By:

BOB   

Name:

Person Details

Person	Site
BOB	--
Name	Department
Bob Enduser	--
Primary Phone	Supervisor
713-297-7900	Fred User Manager
Primary E-mail	Time Zone
bob@tivoli.edu	--



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Additional user information

The user name fields contain an icon that provides details about the relevant person record.

Service Request Details section

Service Request Details

Summary:	Service Group:
Details:	Service:
Customer Charge Account:	Site:
Customer Cost Center:	Asset:
Classification Path:	Location:
Class Description:	Configuration Item:
Internal Priority:	

Service Request Details section

Notice these fields in the Service Request Details section:

- **Summary**
- **Details**
- **Asset, Configuration Item, and Location**
- **Virtualized Environment**
- **Target Description**
- **GL Account**
- **Asset Site**
- **Classification**
- **Priority**
- **Service Group and Service**
- **Vendor**
- **Site**

Summary and Details fields

- A summary is a short description of the request.
- Details are a long description.

Summary and Details fields

In the **Summary** field, enter a concise statement of the request. Full and complete information is placed in the **Details** field.

Asset, Location, and Configuration Item fields

- Assets are possessions that can be evaluated and assessed a financial value. There are various forms of assets, such as servers, printers, and applications.
- A location is generally defined as a place where assets are operated, stored, or repaired. Locations are normally defined as a means of tracking assets.
- A configuration item is any asset that must be managed to deliver an IT service.
- A virtualized environment is one in which the asset or configuration item is not real. An example is the virtual computer on a VMware image.

Asset, Location, and Configuration Item fields

Specify the primary affected asset, location, and configuration item (CI). Specify more assets, locations, and CIs in the Multiple Assets, Locations, and CIs section.

When a relationship exists between assets, locations, and CIs, the related fields are automatically populated when you enter information in any one of the fields. For example, when you enter an asset identifier in the **Asset** field, the related location and CI identifiers, if any, are automatically entered in the **Location** and **Configuration Item** fields.

A relationship describes the dependency or connectivity between configuration items by using basic terms such as runs on, installed on, or contains. A CI can be a source or target in a relationship. For example, an operating system CI is part of the following relationships:

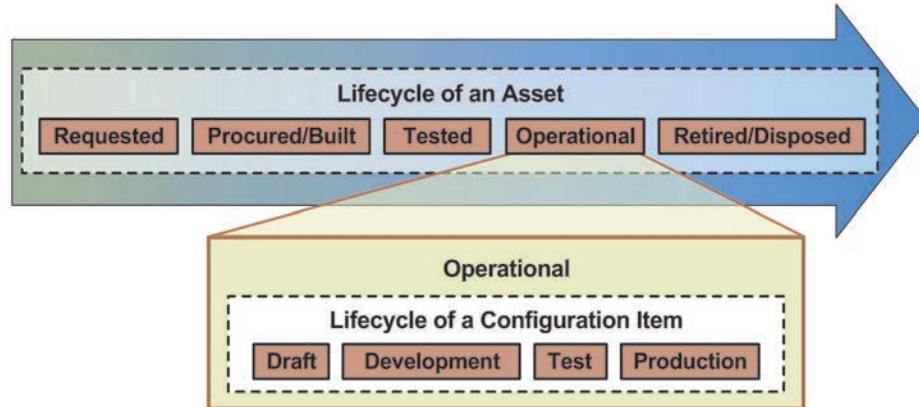
The application CI runs on the operating system CI. In this relationship, the operating system is the object (target) of the relationship.

The operating system CI runs on a computer system CI. In this relationship, the operating system is the subject (source) in the relationship.

If there is a target, enter it into the **Target Description** field in these situations:

- Whether it is an official CI or not
- If it is helpful to know when resolving the ticket

Intersection between assets and configuration items



Intersection between assets and configuration items

An asset becomes a CI when it is necessary to control changes to its configuration.

These concepts intersect at the operation phase. Assets have a lifecycle that spans procurement and development through operations and retirement. After an asset is in operation within the IT infrastructure, it can also be considered a configuration item.

After a useful lifetime, this CI is removed from operational status and reverts to strictly being an asset. Thus, an asset has a longer lifecycle than a CI.

Multiple assets, locations, and Cls

- When the ticket deals with two or more assets, locations, or Cls, they can be added by using the Multiple Assets, Locations, and Cls section.
- They must all share a GL account (no cost splitting).

GL Account field

- **General ledger** (GL) accounts can be used to collect financial data that corresponds in scope and format to an outside accounting system.
- Enter a GL Account, if this ticket must be charged against an account.

GL Account field

GL account codes typically consist of several segments, which are separated by delimiters such as hyphens, as in the following example:

6210-300-450

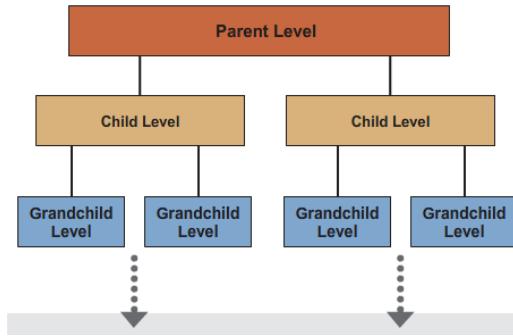
This GL account code has three segments. Each segment represents a component. For example, cost center is in the first segment, activity is in the second, and resource is in the third.

Asset Site field

- Site of the asset on the service request. Use this field when the asset site is different from the affected user site.
- The default value is the site of the person record in the Affected User field.

Classification fields

- Classifications are a means of identifying and describing data.
- Classification is the process of structuring records into organized hierarchies.



Classification fields

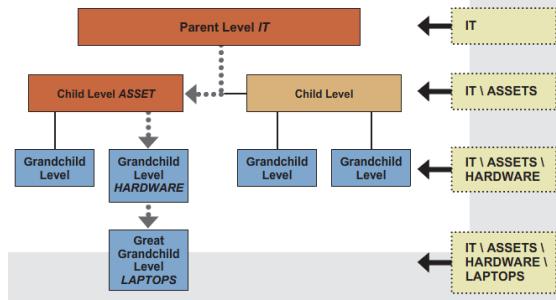
Use classifications to more easily locate tickets and to ensure that tickets are not duplicated unintentionally. Classifications also can help agents and managers search for applicable solutions, enter the record into workflow, and escalate the issue for further attention.

Classifications can optionally contain ownership (owner group and service group) and priority (indicated priority) information. In this case, when a classification is selected, ownership and priority can be automatically entered.

Selecting some classifications displays questions that are used to determine the correct classification.

If tickets are not classified or grouped, they can still be found by using text searches.

Classification path



Classification path

The Classification path is the structure from the top-level parent to the child. An attribute is a means of grouping characteristics of a classification. It allows for logical grouping of similar characteristics.

Classification structures are similar to directory structures in both construction and how they are displayed. Classification structures are hierarchical and created in parent-child relationships. First, create a parent classification; then, add its children. (Each child is also a classification.) Each child can then become a parent and have its own children.

The following example shows the classification of an issue with a computer monitor:

- Classification: 21010104
- Classification Path: 21\2101\210101\21010104
- Class Description: IT Issue \ Hardware \ Desktop \ Monitor

UNSPSC classifications

21	IT Issue
2101	Hardware Issue
210101	Desktop Hardware Issue
21010101	Boot Issue
21010102	Drive Issue
21010103	Data Issue
21010104	Monitor Issue
21010105	Other
21010106	Power / Battery
210102	Laptop Hardware Issue
21010201	Boot Issue
21010202	Drive Issue
21010203	Data Issue
21010204	Power / Battery

UNSPSC classifications

Control Desk provides a set of classifications for Service Desk that can be optionally installed. The United Nations Standard Products and Services Code (UNSPSC) provides an open, global multisector standard for efficient, accurate classification of products and services.

Control Desk comes with these codes in the Best Practices optional installation. They are installed in your lab systems. See <http://www.unpsc.org/> for more details.

Selecting classifications

- By classification or classification description
- By classification path

The left screenshot shows a 'Select Value' interface with a grid of classification items. The columns are 'Classification' and 'Description'. The items listed are:

Classification	Description
21	IT Issue
2101	IT Issue \ Hardware
210101	IT Issue \ Hardware \ Desktop
21010101	IT Issue \ Hardware \ Desktop \ Boot
21010102	IT Issue \ Hardware \ Desktop \ Drive
21010103	IT Issue \ Hardware \ Desktop \ Data
21010104	IT Issue \ Hardware \ Desktop \ Monitor
21010105	IT Issue \ Hardware \ Desktop \ Other
21010106	IT Issue \ Hardware \ Desktop \ Power / Battery
210102	IT Issue \ Hardware \ Laptop
21010201	IT Issue \ Hardware \ Laptop \ Boot
21010202	IT Issue \ Hardware \ Laptop \ Drive

The right screenshot shows a 'Classify' interface with a hierarchical tree structure. The root node is '2:Request for Service', which branches into '21:IT Issue', '2101:Hardware Issue', and '210102:Laptop Hardware Issue'. '2101:Hardware Issue' further branches into '210101:Desktop Hardware Issue' and '210105:Other'. '210101:Desktop Hardware Issue' branches into '21010101:Boot Issue', '21010102:Drive Issue', '21010103:Data Issue', '21010104:Monitor Issue', and '21010106:Power / Battery'. '210102:Laptop Hardware Issue' branches into '210103:Printer Hardware Issue' and '210104:Server Hardware Issue'. '210105:Other' branches into '210105:Hand Held Hardware Issue' and '210106:Other Hardware Issue'.

Selecting classifications

You can use any of the classification fields to select a classification, depending on which way you want to view the information.

Attributes

- **Attributes** describe the characteristics of the classification.
- Common attributes for items and assets are disk size, RAM size, and processor speed.
- After objects are classified, attributes become specifications for that instance and can be updated.

Priority fields

- An important part of managing the volume of Service Desk tickets is to define priorities for each ticket.
- Priority drives the order in which the tickets are handled and the allocation of resources for resolving them.

Priority fields

Priority level values are defined as follows:

- **Urgent:** A catastrophic production problem that can severely affect your production systems, or in which your production systems are down or not functioning. Loss of production data and no procedural workaround exists.
- **High:** A problem in which your system is functioning but in a severely reduced capacity. The situation is causing significant impact to portions of your business operations and productivity. The system is exposed to potential loss or interruption of service.
- **Medium:** A medium- to low-impact problem that involves partial non-critical loss of function. It impairs some operations, but you can continue to function. Either of the following situations might be occurring:
 - A minor issue with limited loss or no loss of function, or impact to your operation
 - An issue for which there is an easy circumvention or avoidance by the requester
- **Low:** General usage questions or request for a modification. There is no impact on quality, performance, or function.

Priority level values

The following values are used to indicate priority:

- Urgent
- High
- Medium
- Low

Priority level values

Priority level values are defined as follows:

1. **Urgent:** A catastrophic production problem that can severely affect your production systems, or in which your production systems are down or not functioning. Loss of production data and no procedural workaround exists.
2. **High:** A problem in which your system is functioning but in a severely reduced capacity. The situation is causing significant impact to portions of your business operations and productivity. The system is exposed to potential loss or interruption of service.
3. **Medium:** A medium- to low-impact problem that involves partial non-critical loss of function. It impairs some operations, but you can continue to function. Either of the following situations might be occurring:
 - A minor issue with limited loss or no loss of function, or impact to your operation
 - An issue for which there is an easy circumvention or avoidance by the requester
4. **Low:** General usage questions or request for a modification. There is no impact on quality, performance, or function.

The three types of priority level

There are three types of priority level:

- Indicated (classification generated): The priority that is associated with the classification that is selected for the ticket. A value is automatically entered in this field if an indicated priority is associated with the selected classification.
- Reported (requester generated): The priority reported by the requester, typically through using the self-service tools.
- Internal (agent generated): The actual priority that is used to determine the order in which tickets are handled and the allocation of resources for resolving tickets.

By default, the **Indicated Priority** and **Internal Priority** fields are read-only.

How the internal priority is determined

- The Internal Priority field is read-only, indicating that the priority matrix is enabled.
- The priority matrix is an internal mapping system in which an agent enters a value for impact and urgency and the matrix generates the internal priority.
- If the matrix is enabled, then the internal priority is generated for the agent. If it is disabled, the agent specifies the internal priority directly.

Priority Matrix application

Type	Impact	Description	Urgency	Description	Internal Priority	Description
INCIDENT	1	Critical	1	Critical	1	Urgent
INCIDENT	1	Critical	2	High	1	Urgent
INCIDENT	1	Critical	3	Medium	2	High
INCIDENT	1	Critical	4	Low	3	Medium
INCIDENT	1	Critical	5	Planning	3	Medium
INCIDENT	2	High	1	Critical	1	Urgent
INCIDENT	2	High	2	High	1	Urgent

Priority Matrix application

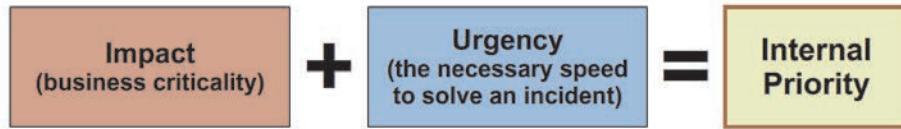
A priority matrix translates Impact and Urgency into Internal Priority. After a ticket's Impact and Urgency fields are completed, the Internal Priority field is automatically populated based on the values in the priority matrix.

For example, if an agent enters **1** and **4** in the **Impact** and **Urgency** fields of a ticket record, the system enters a **3** in the **Internal Priority** field.

Each of the ticket types (service requests, incidents, and problems) can have its own priority matrix. You create priority matrixes with the Priority Matrix application.

The priority matrix can be disabled. If the priority matrix is disabled, Indicated Priority gives the agent some guidance in assigning an internal priority to a ticket (entered in the **Internal Priority** field).

Impact + urgency = internal priority



Impact + urgency = internal priority

The internal priority level is automatically determined from the combination of Impact and Urgency:

Impact is the potential effect that an unresolved issue has on the ability of the business to effectively perform its activities or deliver its services. For example, the failure of a server that supports many customers might be considered to have a critical impact on the business.

An indication of impact is often (but not always) the number of users affected. In some cases, the loss of service to a single user can have a major business impact. It all depends on who is trying to do what. Other factors that can also contribute to impact levels are risk to life or limb, the number of services that are affected, the level of financial losses, or the effect on business reputation.

Urgency is the speed that is considered appropriate to resolve an issue of a particular impact. For example, an unresolved problem might have a high potential to disrupt business activities (high impact). However, it might have a relatively low urgency if a temporary fix or workaround is available.

The Reported and Indicated Priority levels can be used to help determine the Impact and Urgency levels.

Service group

- A service group is a group that is responsible for a certain type of service.
- For example, a company could have an IT service group and a Facility service group.
- It is used as a way of organizing services according to who is responsible for them.
- The Organization, Site, Service Group, and Service fields are used to route the ticket to the right people. Those fields together signify who will normally own the issue that the ticket is concerned with.

Service group

In addition to being automatically entered when a classification is selected, service groups can be associated with a ticket manually.

This field is automatically populated if a service group is associated with the classification that is entered on the ticket. For example, the classification Issue might be associated with the IT service group.

You use the Service Groups application to define all services that you provide or procure. You create a service group for each type of service you define.

You can group tickets, work orders, and contracts by service group or individual service. You can also associate a specific asset, asset type, or location with a service. With the Service Groups application, you can view the relationships that exist between these records and a particular service group or service.

Other examples include Warranty, Environmental Services, Pest Management, EMS, Security Systems, Special Projects, Telecom, Equipment Repair, and Grounds.

Service

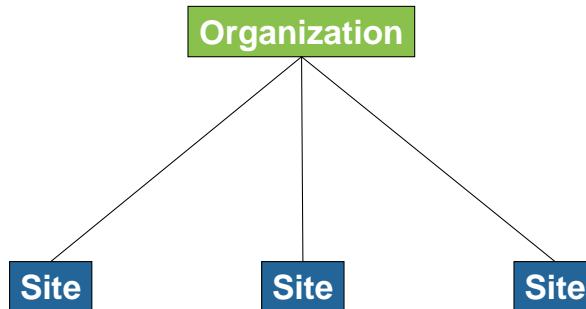
- A list of related services that are provided or procured by a service organization within your company or by an external service provider.
- For example:
 - IT service group
 - Email support
 - Printer support
 - Workstation support
 - Facility service group
 - Moves
 - Maintenance

Vendor field

If the responsibility for the issue (according to Service Group, Service, or Asset) belongs to an outside company, that company is listed here.

Site field

Enter the site that the service request concerns.



Site field

If the **Site** field is not automatically populated (through selection of the Reported by person), you must complete it.

The next two fields, **SLA Applied** and **Accumulate SLA Hold Time**, are covered in Unit 12, “Service level agreements”.

Create work order options

- Use this field to specify how you want work orders to be created from multiple assets.
- For example, assume that TASK is selected. When you create a work order from the service request, it will create one work order with a subtask for each asset in the Multiple, Assets, Location, and CIs section.

Response plans

- Response plans ensure that similar work is performed in a repeatable and consistent way.
- A response plan provides a convenient way to make the management of a ticket easier, more efficient, and more repeatable across similar tickets.
- Response plans can also contain job plans, ticket templates, owners, or owner groups, and other conditions that can be matched with tickets. When a response plan is applied, the system finds a plan that matches the attributes of that ticket.

Response plans

You can apply multiple response plans to a ticket. You can also view a history of all response plans ever applied to the ticket. Response plans are like ticket templates, but can have different effects, depending on the fields of the ticket when it is applied. Response plans can also be applied to work orders.

Key Dates section

Key Dates

Reported Date: 5/14/13 21:20:35	Target Contact: <input type="text"/>	Actual Contact: <input type="text"/>
Target Finish: <input type="text"/>		
View SLAs		

Reported Date

Date and time when issue was first reported

Target Dates

Date and time when SLA's are broken

Actual Dates

Date and time when ticket contact is made or resolution is achieved

The **Target** and **Actual** fields are used only for service level agreements.

Service request templates

- A service request template contains predefined data that you can insert in common, high-volume service request records. An applied template can specify information such as owner or owner group, internal priority, and classification.
- Applying templates can significantly reduce the time that is needed to create service requests because you can insert information simply by applying the correct template. Application of templates is a flexible process. The service request can be modified until the service request is in the Closed status.

Service request templates

When you apply a service request template, it overwrites existing data in the record. If there is data in a service request's field but no data in the corresponding field on the template, the template does not delete the existing data.

A template can contain the following information, which is copied to the service request when you apply the template:

- Internal Priority
- Owner or Owner Group
- Service Group or Service
- Classification
- Vendor
- Organization
- Site
- Status
- Activities

Lesson 6 Time management

IBM Training

IBM

Lesson 6 Time management

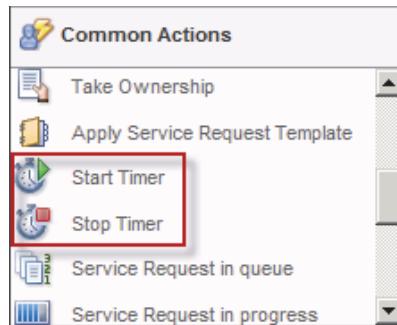
This lesson introduces you to time management for tickets. After completing this lesson, you should be able to explain what time management is used for and how to track time on tickets.

Time management

Frequently, companies want to capture data about the amount of time that workers spend on activities or tasks. This information might be needed, for example, because of the following reasons:

- The Service Desk's goal is to resolve issues within a certain time period.
- The company needs a record of laborers' working hours to calculate costs or to bill outside labor.

Start and Stop timer



Start and Stop timer

The Common Actions toolbar has two icons that are named Start Timer and Stop Timer. Upon beginning work with a ticket, the agent starts the timer. Control Desk then begins recording labor actuals for the ticket.

Confirming time spent

Confirm Timer

The Timer is going to record the time you have spent managing your
Ticket Class:

Record Key:

Review the information below before submitting.
You may update the values and click 'OK' to submit.
Click 'Cancel' to return to the record; the Timer will continue to run.

Start Date:

Start Time:

Finish Date:

Finish Time:

Hours:

Confirming time spent

When the agent finishes working with the ticket, the timer is stopped and Control Desk calculates the elapsed time. This time is added to any existing time already recorded.

Lesson 7 Information locations overview

IBM Training



Lesson 7 Information locations overview

In this lesson, you learn where to find information. After completing this lesson, you should be able to describe where information that is related to the Service Desk is stored.

Information locations

Information can be located in the following places:

- Solutions
- Frequently asked questions (FAQs)
- Another ticket
- Ticket attachment
- External knowledge bases (websites)
- Your or another agent's or analyst's knowledge

Information locations

Finding the information that is needed to fulfill a request or issue can mean different things, depending on the request.

Solutions

- A solution is a predefined response to a commonly asked question or a problem.
- There are two types of solutions:
 - Stand-alone solutions: Solutions that are not tied to a ticket, such as how to reset a password or how to troubleshoot computer crashes. The collection of stand-alone solutions in IBM Control Desk is known as the Solutions Knowledge Base.
 - Ticket-based solutions: Solutions that have been entered into the solution fields of a ticket, but have not been generalized and turned into stand-alone solutions.

Frequently asked questions

- Frequently asked questions (FAQs) are a special type of solution. A solution describes how to fix an issue; a FAQ provides more informational answers.
- A special portlet on the Start Center simplifies searching for only FAQs and not general solutions.

Frequently asked questions

An example of a FAQ might be the location of printer toner, or the steps to follow for setting up a new employee.

Another ticket

- The same issue might have been reported and resolved on another ticket.
- Other open tickets might also contain the same issue. In this case, all the common tickets can be tied together and worked on as a single ticket.

Ticket attachment

Information can be located inside files that are attached to tickets.

External knowledge bases

Not everything will be found inside of IBM Control Desk. It is often helpful to look at external knowledge bases (websites).

Existing knowledge

- You or some other agent or analyst might already know the information.
- If this information is not available through an existing solution, consider adding one. It can help the next agent by being easy to find and can also speed up the resolution of the issue.
- The more solutions available to the agent, the more requests and issues can be resolved at the lowest level possible.

Lesson 8 Searching for information

IBM Training



Lesson 8 Searching for information

This lesson is about searching for the information that is stored in the locations that are mentioned in the previous lesson. After completing this lesson, you should be able to list four ways to search for information by using Control Desk.

Searching for information: Methods

With IBM Control Desk, you have many different ways to find information, including the following examples:

- Search Solutions
- Solutions
- Global Search
- Similar Tickets

Search Solutions application

The screenshot shows the 'Search Solutions' application interface. At the top, there are search filters for 'Solution', 'Classification', 'Class Description', 'Type', 'Asset', and 'Configuration Item'. Below the filters is a table titled 'View Solutions' with columns: Solution, Description, Type, Times Applied on Incidents, Times Viewed, Status, Creation Date, Last Changed Date, and Classification. The table contains five rows of data. At the bottom, there is a section for 'Attachments' with a table showing 'Document' and 'Description' columns.

Solution	Description	Type	Times Applied on Incidents	Times Viewed	Status	Creation Date	Last Changed Date	Classification
SPOC1025	Corporate network account password reset	FAQ	1	3/8/11 10:32:52	9/14/11 10:12:19	31\3103		
SPOC1027	How to release a software license	FAQ	0	3/9/11 12:06:00	8/8/11 07:00:14	41\4102		
SPOC1028	How to order hardware or software	FAQ	0	3/9/11 12:12:15	9/25/11 13:38:23	41		
SPOC1029	How to request a corporate application account	FAQ	0	3/6/11 12:38:59	4/7/11 07:20:58	31\3107		
SPOC1042	Network Slow Response at Southern Sites			1	3/17/11 07:26:25	7/12/11 11:41:06	21\2103\210303\21030301	

The Service Desk

78

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Search Solutions application

The Search Solutions application searches for either all solutions or those solutions that share classification with the current ticket.

Solutions application

The screenshot shows a web-based application titled "Solutions" with a dark header bar. The header includes a "Find Solution" search bar, several icons for filtering and saving queries, and the user name "Scott Servdesk Analyst". Below the header is a toolbar with icons for advanced search, save query, and other functions. The main area is a table titled "Solutions" with 16 items listed. The columns are: Solution, Description, Status, Type, Self-Service Access?, and Author. Each row contains a star rating icon, a unique ID, a brief description, the status (ACTIVE or INACTIVE), the type (FAQ or APP), a checkmark in the self-service access column, and the author's name (MAXADMIN, FRED, or NANCY). There are also small green icons in the last column.

Solution	Description	Status	Type	Self-Service Access?	Author
★★★★★ SPOC1285	Oracle Financials Access - 404 Error	ACTIVE	FAQ	✓	MAXADMIN
★★★★★ SPOC1038	Software install failure error 8140	INACTIVE	FAQ	✓	FRED
★★★★★ TUSC1003	Billing System Access issue - Error 34	ACTIVE	APP	✓	MAXADMIN
★★★★★ SPOC1025	Corporate network account password reset	ACTIVE	FAQ	✓	MAXADMIN
★★★★★ SPOC1027	How to release a software license	ACTIVE	FAQ	✓	MAXADMIN
★★★★★ SPOC1042	Network Slow Response at Southern Sites	ACTIVE		✓	NANCY
★★★★★ TUSC1002	Billing System Performance degradation	ACTIVE	APP	□	MAXADMIN
★★★★★ SPOC1028	How to order hardware or software	ACTIVE	FAQ	✓	MAXADMIN
★★★★★ SPOC1029	How to request a corporate application account	ACTIVE	FAQ	✓	MAXADMIN
★★★★★ SPOC1039	Security compliance Message AT2930	INACTIVE	FAQ	✓	FRED
★★★★★ SPOC1292	Package Tracking Software Error 870	INACTIVE	TRACKING	✓	MAXADMIN

Solutions application

Control Desk provides a Solutions application that can be used to create and manage solution records in a Service Desk environment.

Just like searching for tickets, solutions can be found by filtering the list page of the Solutions application.

Solution information

Each solution contains information that can be used to judge its worth:

- Number of Hits: The number of times users have viewed this solution.
- Last View Date: The last time a user viewed this solution.
- Average Ranking: The average ranking that users have assigned to this solution. Users can rank a solution as Excellent, Very Good, Good, Fair, and Average.
- Number of Times Applied: The number of times that users have used this solution to try to resolve an issue.
- User Comments History: Comments from other users are listed in the User Comments History section near the bottom of the record.
- Solution Author: The login ID of the user who created this solution record.
- Expiration Date: A date after which the solution record is no longer available.

Global Search application

The screenshot shows the Global Search application interface. At the top, there are tabs for 'Search Solutions', 'Search Incidents', 'Search Service Requests', 'Search Problems', and 'Search External Knowledge Base'. Below these are search criteria fields for 'Search Terms (optional)', 'Classification', 'Type', 'Asset', and 'Configuration Item'. A 'Search' button and a 'Clear Fields' button are at the bottom of the search area. Below the search area is a 'Search Results' table with columns: Solution, Description, Times Applied, Priority, % Effectiveness Score, Changed Date, and In Attachment. The table contains five rows of data. At the bottom of the page, there are links for 'The Service Desk', '81', and '© Copyright IBM Corporation 2016'.

Solution	Description	Times Applied	Priority	% Effectiveness Score	Changed Date	In Attachment
▶ ★★★★★ SPOC1042	Network Slow Response at Southern Sites	2		100	7/12/11 15:41:06	
▶ ★★★★★ TUSC1002	Billing System Performance degradation	2		100	3/21/12 18:50:56	
▶ ★★★★★ SPOC1025	Corporate network account password reset	0			9/14/11 14:12:19	
▶ ★★★★★ SPOC1027	How to release a software license	0			8/8/11 11:00:14	
▶ ★★★★★ SPOC1028	How to order hardware or software	0			9/25/11 17:38:23	

Global Search application

Use Global Search to find tickets (including text-based ticket attachments), solutions, and external knowledge bases.

Access Global Search through the **Go To** menu like any other application, from the left navigation pane, or from a ticket application by using the **Global Search** button.

Search scope

The following fields are searched:

- **Tickets**
 - Summary
 - Details
- **Solutions**
 - Description (short and long)
 - Symptom
 - Cause
 - Resolution
- **Attachments**
 - If they are text-based

Search scope

By default, Global Search searches records in all supported applications for the specified text.

The search examines the following fields in each record:

- The **Description** fields (short and long description) and the **Symptom**, **Cause**, and **Resolution** fields in solution records
- The system searches for solution records that were created in the Solutions application. It does not search for solutions that were created on the **Solution Details** tab in the Incidents or Problems applications.
- The **Summary** and **Details** fields in service request, incident, and problem records

The scope of the search can be restricted by selecting which record types to search, which fields to search, or both.

More fields can be selected by using the **Select Additional Attributes** button.

Each time that you open the Global Search window, you must reselect any additional fields to be searched on. The selections are not persistent.

Search operators

Sometimes you do not know the exact value for a field you want to use in a query. For example, you might remember only part of a service request number, but not the exact number. When you do not know the exact value, you can search by using the partial value plus a wildcard character.

=	You can place an equal sign (=) before a word or number to find only records that exactly match that word or number. There should be no space between the equal sign and the word or characters that follow.
<> OR !=	You can place a greater than and less than symbol (<>) or an exclamation point followed by an equal sign (!=) before a word or number to find only records that do not match that word or number exactly. There should be no space between the sign and the word or characters that follow.
>	You can place a greater than symbol (>) before a word or number to find records greater than the word or number. For example, >5 in the WO Priority field would return WO priorities of 6 and above.
<	You can place a less than symbol (<) before a word or number to find records less than the word or number. For example, < 5 in the WO Priority field would return WO priorities of 0 - 4.

Search operators

A wildcard character is a special symbol that stands for one or more characters. A character is an individual letter or number.

Use percent (%) for any number of characters (zero, one, or multiple) in the specified position. For example, enter 100% to find records that start with 100.

Use underscore (_) for one character in the specified position. For example, enter 100 to find records that start with 100 and have a fourth position.

Search results

The screenshot shows the 'Service Requests' search results page. On the left, there's a sidebar with various links like 'All Records', 'All Bookmarks', and 'Changed Service Request in last 24 hours'. The main area shows a list of 'Solution Results' with columns for 'Solution' and 'Description'. The first few entries are:

Solution	Description
SPOC1038	Software Install failure error 8140
SPOC1039	Security compliance Message AT2930
SPOC1292	Package Tracking Software Error 870
SPOC1295	Oracle Financials Access - 404 Error

The Service Desk

84

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Search results

Look through the results to see whether any of them look like they might contain the information that you are looking for.

You can either view a summary of the result or open the entire result record in its home application.

Attachment hit indication

- The column In Attachment indicates that a search hit occurred in an attachment rather than the record itself.
- Documents in txt, doc, html, and xml format are searchable.

Solution Results			
Solution	Description	Class	In Attachment
▶ 1001	Solution attachment demo 1		DOC4
▶ 1002	Solution attachment demo 2		DOC1 DOC2
▶ 1003	Solution demo with no attachments		

Attachment hit indication



Note: If a document has multiple attachments, and hits are found in more than one attachment, each hit is shown separated by a double pipe (||).

Attachments of txt, xml, html, and doc formats are searchable currently. Files should be named appropriately.

Solution result

The screenshot shows a web-based application titled "View Solution". At the top, there is a navigation bar with four tabs: "Solution Details" (which is selected and highlighted in blue), "Related Solutions", "User Comments History", and "Attachments". Below the navigation bar, the title "Solution Details" is displayed. Under this title, the "Solution:" field contains the identifier "SPOC1295" and the description "Oracle Financials Access - 404 Error". To the right of the description is a small icon of a document with a star. Below the solution details, the "Symptom:" field contains the text "Unable to access Oracle Financials using Internet Explorer with 404 errors."

Solution result

When you have reviewed the solution results, if you find one that will resolve the ticket, you can apply it to that ticket. Service Desk agents can associate a solution to a service request, incident, or problem ticket. The contents of the solution are copied into the fields of the ticket's **Solution** tab.

Solution tracking

- Sometimes when working on an issue, whether service request, incident, or problem, multiple solutions are tried before an issue is resolved.
- IBM Control Desk can track all solutions that have been applied to a ticket.

Solution Tracking			
Solution Id	Description	Type	Classification
▶ SPOC1295	Oracle Financials Access - 404 Error		Oracle Financials Issue

Solution tracking

The **Tried Solutions** tab is not displayed by default. To see and use it, you must enable it using the Application Designer and turn on auditing for the ATicket database table.

External knowledge base result

The screenshot shows two windows side-by-side. On the left is a 'Global Search' interface with a search bar containing 'Email Server in Bedford is down'. A callout box points to this bar with the text 'The search term is passed to the external sites'. Below the search bar are several checkboxes: 'Check External KM?' (checked), 'Check All?' (checked), 'Solution?' (checked), 'Service Request?' (checked), 'Problem?' (checked), and 'Incident?' (checked). On the right is a browser window titled 'PSdb | Power Systems (including System p) | Search all - Microsoft Internet Explorer'. The address bar shows 'https://techdev.austin.ibm.com/psdb/system/searchAll.do?accessed=0'. The main content area is titled 'Search Results' and shows a list of 206 matches. A callout box points to this list with the text 'Search hits are highlighted'. One specific result is highlighted, showing details: 'Seq 78 PMR 11,788 created: 2016-01-26 mod ...server for precise info call solved ... 5765F2300129C NRWDNC PRS'. The browser interface includes standard menu items like File, Edit, View, Favorites, Tools, Help, and a toolbar with icons for Back, Forward, Stop, Refresh, Home, Search, and Favorites.

External knowledge base result

When a global search is initiated, multiple external knowledge management tools (websites) can be searched in addition to the Control Desk database.

A new browser window opens for each external knowledge management tool result. This feature saves the user from having to go to multiple tools to search.

Other tickets

- Looking at tickets that are similar or in some way related to the ticket being worked on can be beneficial.
- There are four methods of searching for these tickets:
 - Similar tickets
 - Other tickets by the same person
 - Tickets that are related by service group
 - Tickets that are related by service

Similar tickets

- Sometimes when looking for answers to an issue, it helps to look at other tickets that are similar to the ticket you are working on.
- You can search for existing tickets that are similar to the open ticket by searching for tickets that contain the same value in the Classification field.

Similar tickets



Note: You can also use this feature to search for potential duplicate records.

Other tickets by the same person

View Tickets and WOs

The following ticket(s) and WO(s) have been reported by the same person as the current ticket. Click Relate Records to relate the selected records.

If the base ticket is global:

- Click Relate Records to Global Issue to relate the selected tickets to the global issue. WOs cannot be related as related as global issues.
- Click Cancel to return; your ticket will not be saved.

Tickets

Ticket	Class	Status	Reported Date	Target Start	Description	Reported Priority
1001	SR	DRAFT	5/11/12 15:33:18		Build New Server	A
PULSE1017	INCIDENT	INPROG	2/8/12 07:22:38		Power consumption on the Web Application is not displayed properly	3
TUSC1080	SR	QUEUED	12/23/11 09:11:03		Not Primary user	4 P
TUSC1078	SR	QUEUED	12/23/11 09:09:25		Asset status Update	4 P
TUSC1076	SR	QUEUED	12/23/11 09:07:47		Asset Update New Group	4 T

Work Orders

Work Order	Class	Status	Reported Date	Target Start	Description	Priorit
------------	-------	--------	---------------	--------------	-------------	---------

Other tickets by the same person

It can be helpful to see other tickets or work orders that a person reported or of which that person is a target..

You can relate tickets and work orders to the current ticket for reference or information. This type of a relationship is informal. It provides no status inheritance or other type of link. Linking records informally lets agents navigate to related records, view related information for similar records, and view open tickets that are associated with a field.

The following fields can be used to view and relate work orders:

- Asset
- Location
- Configuration Items

Tickets that are related by service group

View Related Records for Service Group

View Related Records for the Service Group
 View Related Records for the Service Group and Services

[Tickets](#) [Work Orders](#) [Assets and Locations](#) [Asset Types](#) [Service Level Agreements](#) [Contracts](#) [Configuration Item](#)

The following ticket(s) reference the same Service Group as the current record. Click Relate Records to relate the selected tickets to the current record.

If the base ticket is global:
• Click Relate Records to Global Issue to relate the selected tickets to the global issue. WOs cannot be related as related as global.
• Click Cancel to return; your record will not be saved.

1 - 6 of 6

Ticket	Class	Description	Status	History?	Service Group	Service
IM1030	INCIDENT	oracle Batch job 7120 failed on second attempt	NEW	<input type="checkbox"/>	SRMIT	SRMSER
SRM1015	INCIDENT	User can't access his email	QUEUED	<input type="checkbox"/>	SRMIT	SRMSER
SRM1017	INCIDENT	Error when trying to connect to the network	NEW	<input type="checkbox"/>	SRMIT	SRMSER
SRM1090	INCIDENT	Connection problem with email server	QUEUED	<input type="checkbox"/>	SRMIT	SRMSER
SRM1002	SR	Can't authenticate with VPN server	CLOSED	<input checked="" type="checkbox"/>	SRMIT	SRMSER
SRM1005	SR	Monitor is not working	RESOLVED	<input type="checkbox"/>	SRMIT	SRMSER

Tickets that are related by service group

Use the View Related Records for Service Group window to view all the records that are associated with the **Service Group** field (or the service group and service) in the current record.

Tickets that are related by service

View Related Records for Service

Tickets Work Orders Assets and Locations Asset Types Service Level Agreements Contracts Configuration Item

The following ticket(s) reference the same Service as the current record. Click Relate Records to relate the selected tickets to the current record.

If the base ticket is global:
• Click Relate Records to Global Issue to relate the selected tickets to the global issue. WOs cannot be related as related as global.
• Click Cancel to return; your record will not be saved.

Ticket	Class	Description	Status	History?	Service Group	Service
SRM1005	SR	Monitor is not working	RESOLVED	<input type="checkbox"/>	SRMIT	SRMSER
SRM1015	INCIDENT	User can't access his email	QUEUED	<input type="checkbox"/>	SRMIT	SRMSER
SRM1090	INCIDENT	Connection problem with email server	QUEUED	<input type="checkbox"/>	SRMIT	SRMSER
SRM1017	INCIDENT	Error when trying to connect to the network	NEW	<input type="checkbox"/>	SRMIT	SRMSER
IM1030	INCIDENT	oracle Batch job 7120 failed on second attempt	NEW	<input type="checkbox"/>	SRMIT	SRMSER

Relate Records **OK**

Tickets that are related by service

The View Related Records for Service window is similar to the one for service groups that are shown on the previous page. However, you can use this window to view only matching services, not service groups.

Lesson 9 Fulfilling the request

IBM Training



Lesson 9 Fulfilling the request

The Service Desk

94

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This lesson is about fulfilling requests from SR tickets. After completing this lesson, you should be able to list possible ways to fulfill a service request.

How agents fulfill the request

Fulfilling requests can take many forms. Agents can perform the following tasks:

- Provide information, or answers, on their own
- Use another tool to fulfill the request
- Create an incident ticket so that a higher level of support can work the issue
- Create a work order listing work that others must do
- Create a process request so that the request is handled by another process

How agents fulfill the request

Whatever form is used, the management of the service request (as the customer contact) remains with the Service Desk agent.

Providing information

- If the request concerns the requester that is needing information, such as how to print from an application, the agent provides the information.
- When providing the information, the agent should check to see whether any existing solutions or FAQs cover the subject. If none exists, the agent should create one so that other agents, if they do not already know the information, can find it.

Using another tool

- If another tool fulfills the request, the agent uses the tool and then tells the requester the outcome.
- For example, for a password reset, the agent could start IBM Tivoli Access Manager, perform the reset, and then inform the requester of the new password.

Creating an incident ticket

- If there are no existing solutions to the requester's issue, and the agent does not have the knowledge or ability to troubleshoot or fix the issue, the agent creates an incident ticket.
- The incident ticket would then be worked on by level 2 or 3 support.

Creating a process request

- If the ticket is routed to another process manager, a process request is used.
- The request is created and sent to the appropriate management process for fulfillment.

Process requests in use

- When you create a process request from a ticket:
 - A new process request record is opened
 - Information from the ticket record is copied
 - Any missing fields need to be completed
- After the process request is reviewed and accepted:
 - A record is created in the appropriate process management application
 - A record is created in the Work Order Tracking application

Process requests in use

When you create a process request from a ticket, a new process request record is opened in the Process Requests application. Information from the ticket record is copied to the process request. Information from the process request record is copied to the Related Records tab of the ticket.

You or a process request analyst must complete the process request record before it can be entered into the appropriate process management workflow. For example, a process manager must be specified in the **Process Manager Type** field on the record.

After the process request is reviewed and accepted, a record is created in the appropriate process management application, for example, the Changes application for a change request. A record is also created in the Work Order Tracking application.

For example, a Service Desk analyst might create a ticket that involves taking a set of servers offline to resolve a problem. The analyst creates a process request of type Change. The ticket information is copied to the process request record. After the process request analyst accepts the process request, a change record is created in the Changes application.

Lesson 10 Communications

IBM Training



Lesson 10 Communications

The Service Desk

101

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This lesson is about communicating with the Service Desk. After completing this lesson, you should be able to describe the methods of communication the Service Desk can use.

Communications overview

- Communicating with the requester is an important part of the request fulfillment process.
- Communication can go both ways:
 - From the requester to the Service Desk
 - Everything starts when the requester contacts the Service Desk with a request or issue
 - Requesters themselves can check the ticket status
 - From the Service Desk to the requester
 - Keeping the requester informed of the status of the request
 - Asking the requester more details as the ticket moves through the process

Email

User Information

Reported By: 

Name: 

Phone: 

E-mail:  
Select Value
Create Communication

Service Request Details

Communication methods

There are many ways to communicate between the Service Desk and requesters:

- Email
- Logs
- Instant messaging
- Remote diagnostics
- Computer telephony
- Email listener

Communication templates

The Communication Templates application is used to create and manage generic communication templates. These templates can be used to standardize frequently used email communications, also known as notifications.

The screenshot shows the 'Communication Template' application window. At the top, there are tabs for 'Communication Template', 'Recipients', and 'Attachment Folders'. Below the tabs, there's a section for 'Template' details:

- Template:** LSNSRPCEBR (Template used to generate confirmation email for creation of SR)
- Created By:** MAVALINH
- Status:** ACTIVE
- Date:** 7/5/06 06:18:32
- Applies To:** INBOUNDCOMM
- Accessible From:** ALL
- Comm Log Entry?** (checkbox)

Below this is the 'Template Details' section:

- To:** LSNSRSENTO
- cc:**
- bcc:**
- Send From:** makardine@us.ibm.com
- Reply To:**
- Subject:** SR ## objectkey## created

The 'Message' area contains a rich text editor with various buttons for bold, italic, underline, etc. A note at the bottom says: "Your e-mail has been processed. Service Request objectkey has been created with subject: subject. Please use this identifier in all future email communications regarding this Service Request."

At the bottom of the window, there are buttons for 'Save', 'Cancel', and 'Format Hint'. The footer of the application window includes the text 'The Service Desk', '105', and '© Copyright IBM Corporation 2016'.

Communication templates

Service Desk agents can manually create and send email communications from ticket-related applications by using standardized information from predefined communication templates. Communication templates can also be used to create email notifications for use with the automated workflow and escalation processes.

Example: Creating automatic responses to be used when a new ticket is created.

Specific file attachments and document folders can be associated to a communication template. When a communication is sent, files in the associated document folders, and those hardcoded in the template itself, are attached.

Example: A company policies document that is attached to a service rejection email message.

When a communication is created, you can use either a communication template populate default data or a free-form communication. If a template that uses substitution variables is used, then Control Desk enters data from the template. Such data might include the identifier, subject, and solution.

Recipients

- Recipients are the audience for an email communication.
- Recipients can be specified by:
 - Role
 - Person
 - Person group
 - Email address

Recipients

Recipients are specified by these characteristics:

- **Role:** Defines a function or position in a business. A role can represent a job title, such as a department manager, or an assigned duty, such as a watch officer. Roles allow these constructs to be abstracted and reused.
- **Person:** A specific person to whom to send the communication. For example, the supervisor of a group might always need notification when a certain event occurs.
- **Person group:** A set of people that are typically grouped by function or department. By default, communications are sent to all people in the group.
- **Email address:** An email address, typically for someone who is not a known Control Desk user. It is used, for example, when a reply must be sent to a vendor.

Logs

- Each ticket contains two different logs to detail communications sent back and forth:
 - Communications log
 - Work log

The communication log

The communication log displays messages that are sent between Service Desk agents and requesters.

The screenshot shows a software interface titled 'Communication Log' under the 'Work Log' tab. A single communication log entry is displayed. The entry details are as follows:

Originating application	ID	Is Global Issue?	Created By	To
SCOTT	bob@tivoli.edu			

Below the table, there is a 'Details' section containing the following fields:

- Originating application: [redacted]
- ID: [redacted] >
- Is Global Issue?
- Created By: SCOTT
- Date: 6/4/12 16:03:50
- To: bob@tivoli.edu
- Subject: New SR
- Message: Hi Bob,
It's Scott. Just wa
Thanks,
Scott
- Inbound?

The communication log

Control Desk automatically makes entries in the communication log. The log is used to maintain a record of inbound and outbound messages and attachments that are sent between requesters and agents. The log shows entries for the existing record, an originating record, and any follow-up records.

Although business practices vary widely from one organization to another, Service Desk agents commonly communicate the status of a ticket with the originator.

If an incoming email generates a service request, email details are also stored as the initial entry in the ticket's communication log. Images, whether embedded within the email or attached, are also visible from within the communication log.

You can use the communication template to populate default data or create a one-time communication. Depending on system settings, this action can enable an email listener process to associate the record with the originating record. Communications can then go to the original requester and all related communications can become part of the current record.

Entries in the communication log are read-only.

The work log

The work log records work-related information.

Record	Class	Created By	Date	Type	Summary	Viewable?
1002	SR	SCOTT	6/4/12 16:06:49	WORK	Contacted Bob	<input checked="" type="checkbox"/>
1002	SR	SCOTT	6/4/12 16:07:14	WORK	Fixed the error	<input checked="" type="checkbox"/>

The work log

The work log is a diary field to note work that is performed while a ticket is being managed. Agents create the entries in the work log, which is used to record telephone conversations, work performed, work that must be done, observations, and feedback from customers.

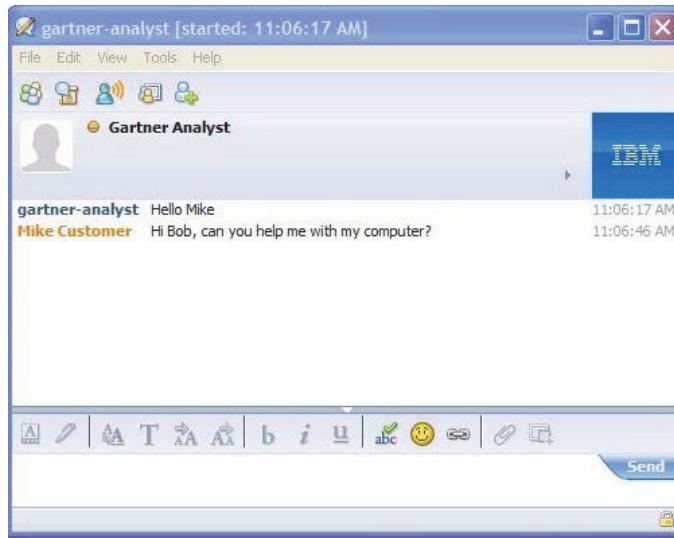
Each entry is one of three types: Client Note, Update, or Work (performed).

- **Client Note:** Makes the log entry viewable by the client
- **Update:** An update to the service request
- **Work:** Specifies a work-related log

If the entry is marked Viewable, it is visible to the individuals listed in the **Reported By** and **Affected Person** fields.

Requesters can then create more work log entries in response. For example, at the resolution of a ticket, a Service Desk agent might request feedback from the customer. The customer can provide the feedback by using a work log entry.

Instant messaging



Instant messaging

If your Service Desk is integrated with an instant messenger, you can conduct conversation sessions with anyone that is involved with a ticket. In these sessions, you can gather information to help resolve an issue.

Control Desk instant messaging offers the following functions:

- The Service Desk analyst can begin a conversation session in real time with any person who is related to a ticket.
- The person who requested the service request can talk to a Service Desk analyst in real time by using an instant messenger application.
- When the conversation ends, the transcript of the conversation is saved in the communication log under the **Log application** tab.

IMBot

- IMBot is a chat bot that responds to instant messages (IM).
- These incoming messages are interpreted as commands to execute within IBM Control Desk. These commands can include listing and querying tickets, and even creating service requests, from an IM interface.

IMBot

Commands can be sent to the IMBot by typing them in the chat window. The IMBot interprets the commands and display the results.

IMBot commands include these examples:

- **Help:** Returns general help or, if an argument is passed, the help for that command.
- **List:** Lists tickets in a status other than Closed where the requester is the Reported By person.
- **Query:** Queries an individual ticket.
- **Create SR:** Creates a service request with the specified description. Does not support attachments.
- **Request Chat:** Creates a service request to chat with the requester.

IMBot benefits

Some of the features and benefits to using IMBot are:

- Ease of access, ease of use: IMBot does not require any special software to use. It works with the existing instant messaging system.
- Speed: Querying tickets through IMBot is much faster than through the IBM Control Desk Web interface.
- Extensible: IMBot provides a simple API for creating new commands. These commands can be bound to IMBot to extend its functionality.

Computer Telephony Integration (CTI)

- With CTI, your telephony system can interact with IBM Control Desk.
- The net effect is that agents already have the required screen on their terminal before speaking with the customer.
- Using CTI, you can populate IBM Control Desk records and fields with mapped information based on lookup information that is provided by the CTI system. It populates that data instantaneously in the Reported By and Affected By fields.
- CTI is supported for Genesys systems. Unsupported integrations with Cisco and JTAPI are also available.



Computer Telephony Integration (CTI)

The integration with Genesys is supported. Refer to ISM Library,
<https://www-304.ibm.com/software/brandcatalog/ismlibrary/details?catalog.label=1TW10SR01>.

The integration with JTAPI is NOT supported. But, the integration procedure is documented in ISM Library. Refer to
<https://www-304.ibm.com/software/brandcatalog/ismlibrary/details?catalog.label=1TW10SR05>.

The integration with Cisco is NOT supported. But, the integration procedure is documented in ISM Library. Refer to
<https://www-304.ibm.com/software/brandcatalog/ismlibrary/details?catalog.label=1TW10SR08>.

The email listener

- IBM Control Desk has a feature that is called the email listener, which efficiently processes inbound emails into service request, incident, and problem tickets.
- The system then separates the email into discrete components, such as To, From, CC, Subject, and Message, and extracts and stores any attachments.

The email listener

The email listener can create, update, and query Service Request, Incident, and Problem records.

Lesson 11 Documenting the solution

IBM Training



Lesson 11 Documenting the solution

In this lesson, you learn about documenting solutions in tickets. After completing this lesson, you should be able to describe how and where to document solutions for tickets.

Documenting the solution: Overview

- If there was no existing solution, and the Service Desk might benefit from one, the agent should create one.
- The agent can create one using the Solutions application. However, an easier method is to add the solution information directly into the ticket.
- By completing the fields on the Solution tab, a solution specific to that ticket is created. This type of solution is known as an ad hoc solution.
- From there you can create a standard solution. To do so, create a solution and then generalize the fields by removing any specific references to a particular person, and so on.

Solution fields

The screenshot shows the 'Solution' tab selected in a navigation bar. Below it, various solution details are listed in a grid:

Solution:	SPOC1295	Oracle Financials Access - 404 Error	
Classification:	21\2107\210701	»	
Class Description:	Oracle Financials Issue		
Last View Date:	6/4/12		
Type:			
Status:	ACTIVE		
Status Creation Date:	8/8/11 08:37:21		
Self-Service Access?	<input checked="" type="checkbox"/>		
Solution Author:	MAXADMIN		
Expiration date:	<input type="text"/>		
Number of Hits:	2		
Times Applied by Service Desk on Incidents:	1		
Times Applied by Self Service:	1		
Last Changed Date:			

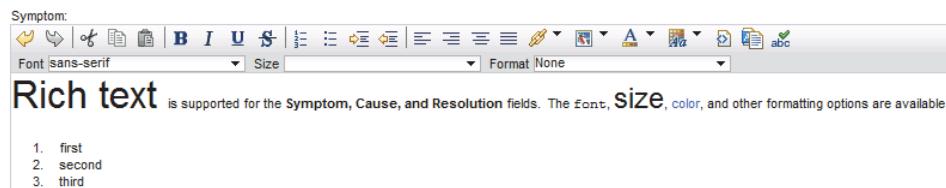
Solution fields

Note the following Solution fields:

- **Classification:** Specify what classification the solution belongs to.
- **Type:** Enter a type, for example, FAQ, Solution.
- **Asset or configuration item:** If a solution is associated with a particular piece of equipment, list it here.
- **Symptom:** Describe the requester question or problem.
- **Cause:** List the cause or causes of the problem.
- **Resolution:** Answer the question to explain how to solve the problem.
- **Image:** A single image can be attached to the solution.
- **Keywords:** Add keywords that can help others find the solution.
- **Self-Service Access:** Select this check box to make the solution accessible to self-service users. Some solutions might not be appropriate for self-service users to view. Those solutions might be too complex for customers to perform, or customers might not be authorized to perform them.

Field formatting

- The Symptom, Cause, and Resolution fields support rich text markup. You can change features such as font, size, and formatting options.
- Use this feature to highlight different parts of the solution.



Solutions that relate to other solutions

- Like the ability to relate tickets to each other, solutions can also be related to each other.
- This relationship can be one to one, one to many, or many to many.

Related Solutions		
Related Solution		Description
▶	1001	Printout light
▶	1002	Printout light
▶	1003	Expiration test

Lesson 12 Resolving tickets

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Lesson 12 Resolving tickets

In this lesson, you learn about the various methods that might be used to resolve a service request.

The lesson covers the differences between closing and resolving a ticket and the circumstances under which a ticket could be deleted.

Resolving versus closing

- In most cases, instead of closing the ticket with a closed status, it is preferable to close it with a Resolved status.
- The Resolved status is usually preferred because after a ticket has been marked Closed, it cannot be reopened. However, in some cases it might be necessary to reopen the ticket (for example, if the issue recurs).

Resolving versus closing

Some companies create workflows to automatically close a resolved ticket after a defined number of days.

Deleting tickets

- Tickets can be deleted only if the following conditions are met:
- The ticket must have one of the following statuses:
 - New
 - Queued
- The ticket cannot
 - Have any related tickets that are associated with it, and the ticket cannot be listed as a related ticket on any other record
 - Have been an originating record for another ticket
 - Have any work log entries
 - Have ever been in a workflow

A service request should be canceled only in rare cases. Even if a request proves to be unauthorized or misdirected, most organizations prefer to keep a record.

Lesson 13 The Incidents application

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Lesson 13 The Incidents application

The Service Desk

123

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This lesson is an overview of the Incident application and the fields and sub-tabs of which it is built. After completing this lesson, you should be able to describe the data captured by the Incident application and understand the purpose of each sub tab and what information the subtabs capture.

Incidents application window

The screenshot shows the 'Incidents' application window. At the top, there's a toolbar with various icons for search, filter, and navigation. The main area displays an incident record for IM1026, titled 'Unable to access Oracle Financials'. The incident is assigned to 'NANCY' and has an internal priority of '1'. It was created by 'SCOTT' on 3/15/11 at 17:40:51. A status bar at the bottom shows 'New', 'Queued', 'In Progress', 'Pending', 'Resolved', and 'Closed' status indicators.

User Information

Reported By: BOB
Name: Bob Enduser
Source:
Customer:

Affected Person:
Name: Bob Enduser

Incident Details

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124

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Incidents application window

The Incidents application is used to create and modify incident records.

Incidents application tabs



Incidents application tabs

The Incidents application contains the following tabs:

- **Incident** to create, modify, view, and delete identifying information for the incident record, and to search for possible solutions.
- **Solution Details** to add or view solution information for this record.
- **Activities** to report actual labor time that is spent resolving the incident and to create, delegate, and track activity work orders for the incident.
- **Related Records** to relate, view, and navigate relationships between service requests, incidents, problems, and other records.
- **Log** to create, view, modify, or delete work log entries, and to view communication log entries.
- **Failure Reporting** to view and record failure information for assets and locations on a problem record.
- **Automation** to start workflows that might help correcting the incident.
- **Service Address** to view the geographic location information about the incident, such as address or longitude and latitude of the site.
- **Map** view a map of the location that is related to the incident.

Lesson 14 Creating the incident ticket

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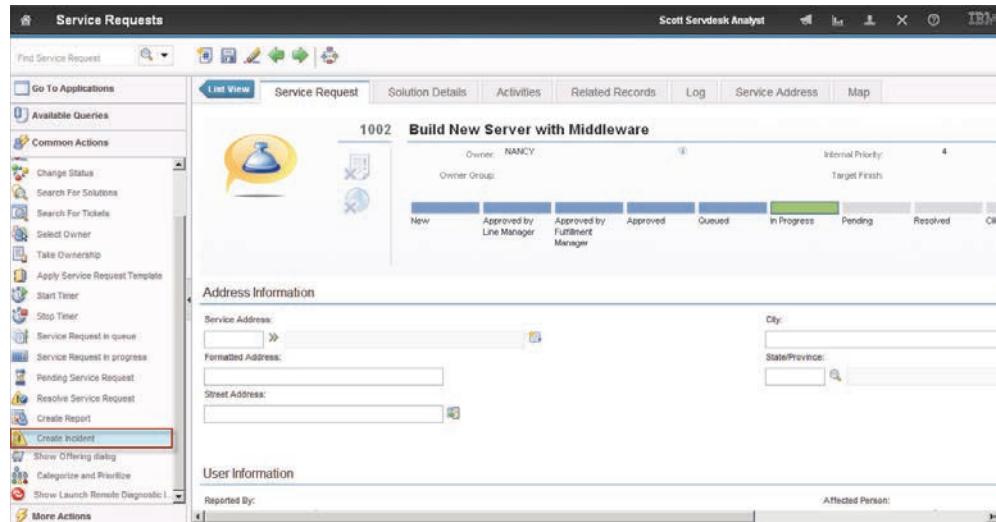
Lesson 14 Creating the incident ticket

The Service Desk

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In this lesson, you learn how to create an incident ticket. Additionally, you learn how to locate and apply templates to reduce the amount of keyboard input that is required when completing the ticket information. After completing this lesson, you should be able to navigate to the Incident application and create a new Incident ticket. You should also be able to select and apply a template to the tickets you create.

Creating the incident ticket



Creating the incident ticket

As with service requests incident tickets can be created in multiple ways. However, the standard way is to create one from within the Service Requests application. This method creates a relationship between the two tickets.

Incident ticket template

- An incident template contains predefined data that you can insert in common, high-volume incident records. An applied template can specify information such as internal priority, classification, owner, service, vendor, and activities.
- Applying templates can significantly reduce the amount of time that is needed to create incident records because you can insert information simply by applying the correct template. Application of templates is a flexible process because you can modify applied information until the incident is in a Resolved or Closed status.

Selecting a template

When you select a template, the system searches for active templates for incident records. Because templates can contain and apply job plans, the set of templates from which you choose depends on the organization and site that is associated with the incident record.

Selecting a template

When the **Site** field of an incident is blank, the system displays all incident templates for all organizations when the cursor is in the field, after you press the Enter key.

If there is a value in the **Site** field of the incident, the system displays the following templates:

- Incident templates where the site that is specified on the incident is within the organization that is specified on the template
- Incident templates that have no specified organization

Applying a template

- When you apply an incident template to an incident record, it overwrites existing data in the record. If there is data in an incident's field but no data in the corresponding field on the template, the template does not delete the existing data.
- If a template activity contains activities, job plans, or both, the system creates an incident activity for each template activity and potentially for each template job plan. Addition of activities for job plans is site-dependent.
- Activities that are created from job plans include creation of associated labor, materials, services, and tools from the job plan.

Applying a template

A template can contain the following information, which is copied to the incident when you apply the template:

- Priority
- Classification Path
- Owner or Owner Group
- Vendor
- Service or Service Group
- Organization

You can modify the applied information until the incident is in a Resolved or Closed status.

Lesson 15 Filling out the incident ticket

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Lesson 15 Filling out the incident ticket

The Service Desk

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In this lesson, you learn how to complete the fields in an Incident ticket.

Proper description of the specific problem areas, when they occurred, where they occurred, and the impact of the incident on the customer's work are all used to determine a proportionate response. A clear definition of the problem and its impact helps determine the type and number of resources required to resolve the incident. When you complete this lesson, you should be comfortable navigating the Incident application's fields and tabs and be able to describe their purpose and appropriate content.

Defining the incident

- Because the investigation is based on the definition of the incident, this definition must state precisely which deviation or deviations from the agreed-upon service levels have occurred.
- Often, during the definition of an incident, the most likely cause is already indicated. Take care not to jump to conclusions, which can guide the investigation in the wrong direction from the beginning.

Describing the incident

- The following aspects are used to describe the issue:
 - Identity: Which part does not function well? What is the problem?
 - Location: Where does the problem occur?
 - Time: When did the problem start to occur? How frequently has the problem occurred?
 - Size: What is the size of the problem? How many parts are affected?

Automation tab

Description	Process	Process Revision
Get the list of Windows Computer Systems using REST API	RBARESTAPI	1
Reset Cell Relay	RBASMRESET	1
Reset CISCO3840 Router to default settings	RBARECONF	1

Automation tab

The only differences between the incident ticket and service request ticket screens are the **Failure Reporting** and **Automation** tabs. You use the **Automation** tab to start automated workflows that might help resolving the incident.

Failure Reporting tab

Type	Failure Code	Description	Actions
PROBLEM	APPCODE	Application Code	
CAUSE	BUG	Bug	
REMEDY	WORKKRND	Work Around	

[List Failure Codes](#)

Failure Reporting tab

You use the **Failure Reporting** tab to view and record failure information for assets and locations.

Failure reporting

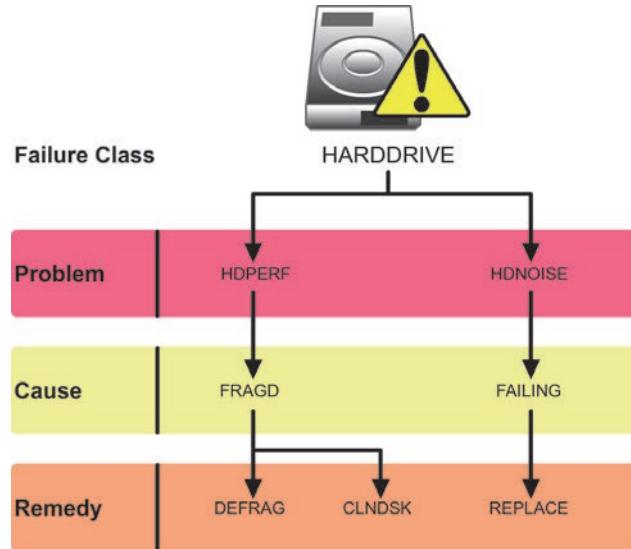
- A failure report is a coded description of an asset failure, typically expressed in terms of a problem code, cause code, and remedy code.
- These reports can help identify trends and isolate probable causes of breakdowns.

Failure reporting

One of the goals of problem management is to get to the root cause of an incident and record the resolution of the problem. IBM Control Desk accomplishes this objective with the use of failure reports.

If you do not use failure reporting to report information about the asset or location, you can use the **Solution Details** tab. On this tab you can enter free-form descriptions of the problem, cause, and remedy. The downside to this method is that with a free-form description it is impossible to drill down or hierarchically view the information.

Failure hierarchy



Failure hierarchy

A failure hierarchy is a structured list of legitimate failures and solutions that are defined for a site. With this structure, failures can be reported against an asset or locations.

A failure hierarchy does the following tasks:

- Identifies all levels of asset problems, causes, and remedies
- Provides a framework within which failures can be reported and the causes of breakdowns can be recorded and tracked

Failure hierarchy can consist of between one and four levels. In other words, you can describe the failure class only, or the failure class down to the remedy, or any combination in between.

List failure codes

Select Failure Codes

Select a failure code by clicking anywhere in the row. Click Select to select the highlighted row and move down to the next level of the failure hierarchy. Click Select and Return to select the highlighted row and return without continuing down the hierarchy. Click Cancel to return to the original page with no selections.

Failure Code	Type	Description
NWKRESP	Network Response	
ORACFIN	Oracle Financials Issue	
EMAIL	Email	
DESKTOP	Desktop	

Records Solution Details Log Failure Reporting Service Address Specifications Automation

Site: PMSCRTP Status: QUEUED

Remarks: Oracle Financials Issue

Remark Date:

Failure Report Filter 1 - 3 of 3

Type	Failure Code	Description
PROBLEM	USERERR	User Error
CAUSE	USERED	User Education
REMEDY	USERTRN	Recommended User Training

List Failure Codes

List failure codes

Use the List Failure Codes window in the Incidents application to report failure information for the asset or location on the record.

There must be a value in the **Site** field before you can report failure information. If there is a failure class that is associated with the asset on the record, the system enters it in the **Failure Class** field.

Creating a global issue

Global Issues

Indicate if this is a global issue (root cause). Select the root cause if this is not a global issue.

Is Global Issue?

Related to Global ID: >>

Global Class:

OK **Cancel**

Select Value

Ticket	Description	Class	Organization
PM1007	Network slow	PROBLEM	PMSIBM
IM1029	Network slow	INCIDENT	PMSIBM
SR1053	Network slow	SR	PMSIBM
PULSE1016	Cell Relay #1 is not functional	INCIDENT	

Classification Search

Attributes	Description	Section	Search Value
...No rows to display...			

Ticket	Class	Description
MR1001	INCIDENT	Forgot Email Password
MR1002	INCIDENT	Unable Quota Exceeded - Need more space
SR10101	INCIDENT	unable directory from application server
SR10102	INCIDENT	User can't access his mail
SR10103	INCIDENT	Connection problem with email server

The Service Desk

139

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Creating a global issue

Change the global issue status of a ticket by clicking the globe on the first page of a service request, incident, or problem ticket.

If a ticket is a global issue, then select the **Is Global Issue** option.

If a ticket must be associated with a global issue, use the detail menu option to choose the related ticket. It can be selected from a list of global issues, or you can search for other tickets based on classification or attributes.

Lesson 16 Resolving the incident

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Lesson 16 Resolving the incident

The Service Desk

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In this lesson, you learn the various ways a ticket can be resolved.

Within IBM Control Desk, tickets can be resolved through the physical action of the resolver:

- Transfer the ticket to another individual or team with more expertise or
- Create an activity work order that sets a defined process in motion, including specific activities and tasks

When you complete this lesson, you will be able to describe the differences between resolving and closing an incident ticket; you should also understand the larger impact of how an incident is finished.

Methods for resolving the incident

Resolving the incident can take many forms. The analyst can take the following actions:

- Transfer the ticket to another department better suited to resolve the incident
- Create an activity work order
- Generate a work plan
- Create a process request so that the request is handled by another process

Methods for resolving the incident

The chosen solution here depends on company process. Although Control Desk can document every step to follow and who performs them, many businesses might not need this level of detail. Many smaller companies choose to transfer tickets with a description of what must be done.

Transfer the ticket

- If, after troubleshooting, you find that the issue belongs to another service or person group, you can transfer the ticket.
- Enter a detailed description of what was done, what was found, your ideas, theories, and so on. Include anything that can help the next person resolve the issue.

Create an activity work order

- A work order is a request for work to be performed. An activity work order (or just activity) is a type of work order that has a ticket as a parent.
- It specifies activities to be accomplished, and the labor, materials, services, and tools that are needed to complete the work.
- You can think of an activity as being similar to a ticket, a collection of information used for a particular purpose. A ticket tracks an issue or request, but an activity tracks work that is performed.

Create an activity work order

When you create a work order from an incident, you create a relationship between the two records. Creating such a relationship usually is for information purposes only, with no inheritance of status or other type of linkage.

For example, a ticket for a network printer problem might include three activities:

- Check the network connection.
- Check the printer.
- Check the network.

The **Site** field is automatically populated, depending on the information available:

- If the incident contains a value in the **Asset Site** field, the system copies the value to the **Site** field of the work order.
- If the incident does not contain a value in the **Asset Site** field but does contain a value in the **Site** field, the system copies that value to the Site field of the work order.
- If neither field contains a value, the system copies the default insert site of the logged-in user to the **Site** field of the work order.

Activity owners

- Each activity can be assigned to a different owner or owner group if needed.
- For example, hiring a new employee could include the following activities:
 - Issue security badge: Assigned to the Security group
 - Issue computer: Assigned to the IT group
 - Assign telephone number: Assigned to the Telecommunications group

Common activity statuses

- WAPPR: Waiting on Approval
- APPR: Approved
- WMATL: Waiting on Material
- INPRG: In Progress, or Initiated
- COMP: Completed
- CLOSE: Closed
- CAN: Canceled

Common activity statuses

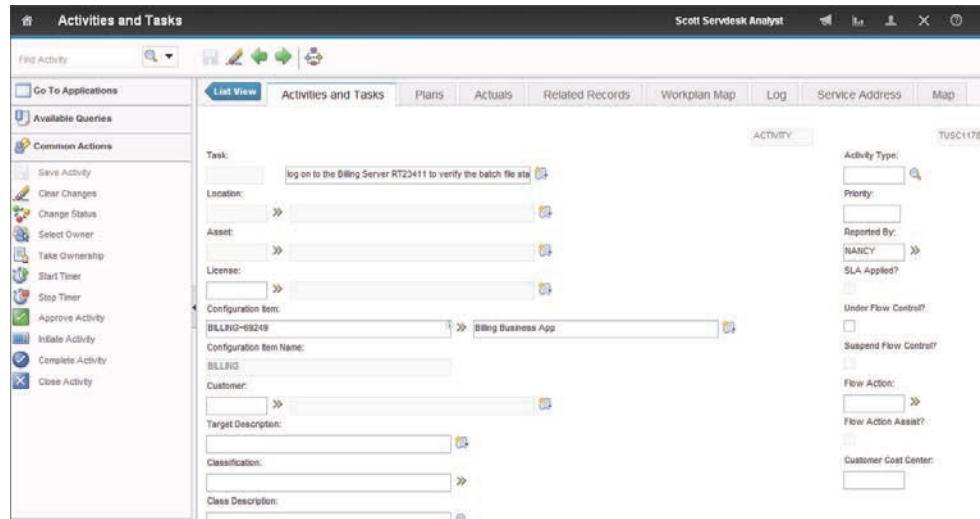


Note: The default status for activities is WAPPR.

Tasks

- Each activity can be broken down into a series of steps that must be performed to complete the job.
- SmartCloud Control Desk calls these numbered steps tasks.
- Tasks contain a description of the work to be done at that step, and the estimated time for its completion.

The Activities and Tasks application



The Activities and Tasks application

The Activities and Tasks application is used to plan, review, and manage activities.

Non-Service Desk workers or technicians can use the Activities and Tasks application to report completion of work that is assigned to them by Service Desk analysts or technicians.



Note: Activities are not created in this application. Activities are created in the ticket applications or by creating a generic process request.

Job plans

- A job plan is a detailed description of how a job is to be performed and the resources that are needed to complete it.
- A job plan typically includes procedural descriptions and lists of estimated materials, items, labor, and tools to be used on the job.
- If you use a job plan, you do not have to enter the same information every time you create a work order for similar work.
- Think of a job plan as a sort of ticket template for work orders.

IBM Control Desk uses job plans to predefine the work plan information. Job plans describe the work that must be done on a work order.

Applying a job plan to an activity

- When you assign a job plan to an activity, its resource estimates and tasks are copied into a work plan for the work order.
- You can then modify a work plan so that the procedures, labor, materials, and tools are more specific to the work order, without affecting the original job plan template.

Lesson 17 The Problems application

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Lesson 17 The Problems application

The Service Desk

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This lesson is an overview of the Problems application and the fields and sub-tabs of which it is built. When you complete this lesson, you should be able to describe the appropriate time to use the Problems application and how it compares with Service Requests and Incidents.

The Problems application window

The screenshot shows the 'Problems' application window. At the top, there's a toolbar with various icons for search, save, and navigation. Below the toolbar, a message bar indicates that location sharing permission is required for map functionality. A navigation bar at the top right shows the user is 'Scott Servdesk Analyst'. The main area is a grid table titled 'Problems' with columns for Problem, Summary, Reported By, Customer, Internal Priority, Status, Owner, and Owner Group. The table contains 11 rows of problem records, each with a unique ID and a brief description. The last three rows are identical, describing Oracle system downtime with website error 404.

Problem	Summary	Reported By	Customer	Internal Priority	Status	Owner	Owner Group
1003 ¹	Billing server slow performance	BOB		2	PENDING	NANCY	
PM1005 ¹	Unable to access Oracle Financials	BOB		1	CLOSED	NANCY	
PM1007 ¹	Network slow	JAMESJS		1	INPROG	NANCY	
SRM1001 ¹	User can't access his email	BOB		3	CLOSED		
SRM1106 ¹	Connection problem with email server	BOB		1	CLOSED	NANCY	
TUSC1013 ¹	Oracle system appears to be down -website error 404	BOB		4	PENDING	SCOTT	
TUSC1031 ¹	Oracle system appears to be down -website error 404	BOB		3	PENDING	SCOTT	
TUSC1032 ¹	Oracle system appears to be down -website error 404	BOB		4	QUEUED		
TUSC1033 ¹	Oracle system appears to be down -website error 404	BOB		3	PENDING	SCOTT	

The Problems application window

Although the process of problem management is different from incident management, the Problems application that supports it is similar to the Incidents application.

Problem records can be created in the Problems application, or by using the Create Problems action available from any ticket or work order application.

Problems application tabs



Problems application tabs

The Problems application contains the following tabs:

- **Problem** to create, view, modify, or delete the problem record.
- **Activities** to report actual labor time that is spent resolving the problem and to create, delegate, and track activity work orders for the problem.
- **Related Records** to relate, view, and navigate relationships between service requests, incidents, problems, and other records.
- **Solution Details** to add or view solution information for this record.
- **Log** to create, view, modify, or delete work log entries, and to view communication log entries.
- **Failure Reporting** to view and record failure information for assets and locations on a problem record.
- **Specifications** to classify a problem and specify attributes to define it further. For example, a problem might involve the classification of a computer, with attributes of memory, disk space, and speed, for which you can define values. Attributes help categorize problems, making it easier to find and manage problems.
- **Service Address** to view the geographic location information about the incident, such as address or longitude and latitude of the site.

Lesson 18 Creating a problem ticket

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Lesson 18 Creating a problem ticket

The Service Desk

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In this lesson, you learn how to create a problem ticket through a review of the screen fields and tabs. Additionally, the **Is Known Problem** check box is described. A known problem usually has a previously defined workaround that can shorten the time to resolution. When you complete this lesson, you should be able to be able to complete a Problem ticket with an appropriate amount of information to be useful for resolver subject matter experts to understand and respond to the root cause of an issue.

Problem application window

The screenshot shows the 'Problems' application window. At the top, there's a toolbar with icons for search, refresh, and various actions. Below the toolbar, a navigation bar includes 'List View' (which is selected), 'Problem', 'Activities', 'Related Records', 'Solution Details', 'Log', 'Failure Reporting', 'Specifications', 'Service Address', and 'Map'. The main area displays a problem record with the ID '1001'. It features a yellow warning icon and a circular progress bar indicating the status: 'New' (green), 'Queued' (grey), 'In Progress' (yellow), 'Pending' (orange), 'Resolved' (blue), and 'Closed' (grey). To the right of the progress bar are fields for 'Owner', 'Owner Group', 'Internal Priority', 'Target Finish', 'Created By' (MAXADMN), and 'Applied Template'. Below this, the 'User Information' section contains fields for 'Reported By' (with a dropdown menu showing 'MAXADMN'), 'Affected Person' (with a dropdown menu showing 'MAXADMN'), 'Name', 'Phone', and 'E-mail'. The 'Problem Details' section includes fields for 'Summary' (with a small image icon), 'Classification' (with a dropdown menu showing 'MAXADMN'), 'Classification Path' (with a dropdown menu showing 'MAXADMN'), 'Class Description' (with a dropdown menu showing 'MAXADMN'), and 'Virtualized?' (with a checkbox). There's also a 'Attachments' section with a magnifying glass icon. At the bottom left, it says 'Indicated Priority:'. The bottom of the window has a footer with 'The Service Desk', '154', and '© Copyright IBM Corporation 2016'.

Problem application window

The Problem application is laid out in a similar way to the Service Request and Incident applications. It contains fields for the reporting user, affected user, name, address, phone, and email. Additionally, it contains fields in which the problem can be described and classified.

Like the other applications, there are fields to describe the asset and configuration item that are involved in the problem as well as fields in which the user can record time that is spent on the problem.

As shown in the next slide, there is a **Is Known Error** field that can be useful in researching and solving the problem in a minimum amount of time.

Known error: Problem ticket

Target Description:



Is Known Error?

Customer:

 >> 

Known error: Problem ticket

Identify a problem as a known error by selecting the **Is Known Error** check box. Select this check box to indicate that the problem has a solution or a known workaround. Selecting this check box adds the problem to the collection of known errors that Service Desk agents use to provide quick resolution to related problems.



Note: The **Is Known Error** check box is disabled until you add a solution to the problem on the **Solution Details** tab. You must also classify the problem to include it in the list of search results that are displayed when an agent searches for problems that are marked as known errors. From a ticket record, an agent can search for known problems that match the classification of the ticket.

Problem ticket template

- A problem template contains predefined data that you can insert in common, high-volume problem records. An applied template can specify information such as internal priority, classification, owner, service, vendor, and activities.
- Applying templates can significantly reduce the amount of time that is needed to create problem records because you can insert information simply by applying the correct template. Application of templates is a flexible process because you can modify applied information until the problem is in a Resolved or Closed status.

Review questions

1. What does a service desk do?
2. What is the purpose of ticket templates
3. What are some ways that users communicate with the Help Desk?

Review answers

1. What does a service desk do?

The Service Desk is a central point of contact between service providers and users on a daily basis. It is where users can report issues, ask for information, and request services. It facilitates the restoration of normal operational service with minimal business impact on the customer within agreed-upon levels and business priorities. With the Service Desk, users can report issues and request services

2. What is the purpose of ticket templates?

Ticket templates save time when opening common ticket types by automatically completing fields with predetermined information.

3. What are some ways users communicate with the Help Desk?

Telephone, face-to-face (walk-up), fax, video, email, instant messaging, web interface, or by automated messages sent by hardware and software.

Student exercises



Student exercises

Summary

- Navigate the classroom environment to log in, create service requests and search for solutions
- Take ownership of a service request, change the SR's status and resolve the ticket
- Create entries in the solution application to build the knowledge base within IBM Control Desk
- Transfer a service request to another resolver
- Use the data in an existing service request to create an incident within Control Desk

Summary

Unit 4 Service requests, incidents, and problems

IBM Training



4 Service requests, incidents, and problems

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This unit details service requests, incidents, and problems. Topics include the differences between the ticket types; the process flows involved in handling the tickets; and the roles involved.

Objectives

- Describe the differences between service requests, incidents, and problems.
- Create a problem ticket from the incident ticket, bringing existing data forward.
- Search external knowledge bases for solutions.
- Use known errors to efficiently resolve incidents and problems.
- Follow the flow of a complex issue from report to resolution.
- Define and describe the roles that are associated with the Service Desk.

Lesson 1 Process flow

IBM Training



Lesson 1 Process flow

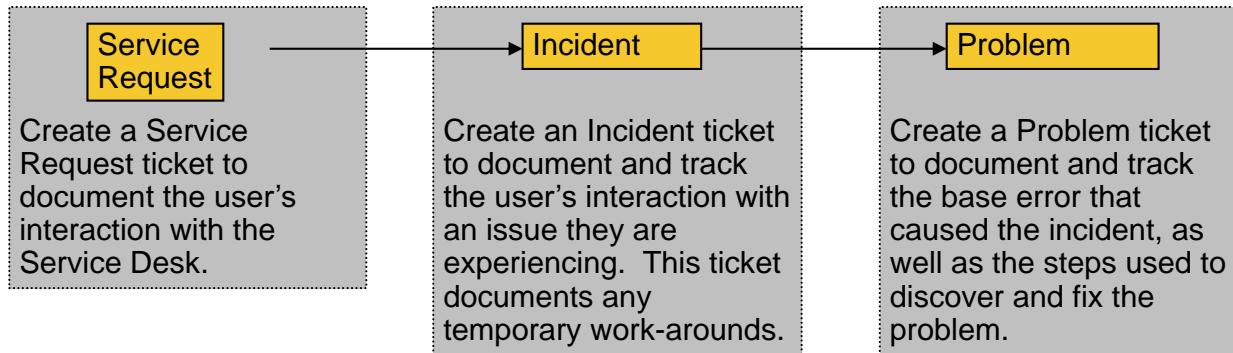
Service requests, Incidents, and Problems

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In this lesson you learn the process flow of a help desk ticket. Tickets can be opened as Service Requests, resolved, and then closed. In other scenarios, the Service Request might lead to the creation of an Incident ticket, a Problem ticket, or both.

After you complete this lesson, you will understand the various scenarios and be able to perform the tasks required in the unit's exercises.

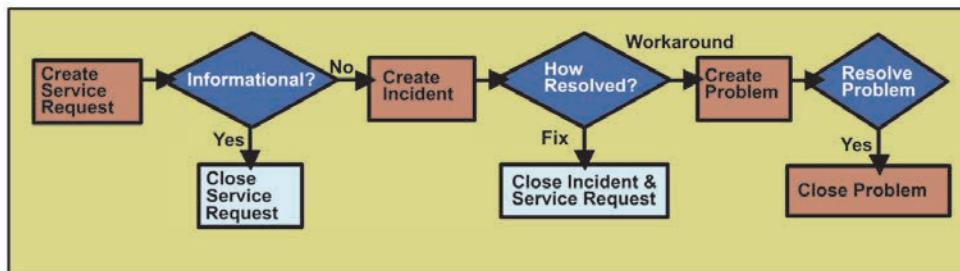
Service Desk process flow overview



Service Desk process flow overview

The typical process flow is from Service Request to Incident to Problem. However, this is not the only way tickets can be created. It is possible to create tickets independently, and they can be of one, two, or all three types.

Typical ticket flow



Typical ticket flow

The first step in any contact with the Service Desk is the creation of a service request ticket. This contact can come in many forms, including the following examples:

- A call from a person who asks how to order toner
- An instant message from a requester who is experiencing an issue with a notebook
- An automated communication from a hardware monitoring application

Contact with the Service Desk is typically for one of two reasons: either a request for information, or to report an issue.

If the requested service was for information only, the information is given, the Service Request ticket is closed, and the interaction with the Service Desk ends. No further action is required to satisfy the request.

Example: A caller wants to know where to order toner because the printouts from the department's printer are light.

If the service request involves an issue that must be resolved, an incident ticket is created to track the issue. A relationship is then formed between the two tickets.

A service request ticket details only the contact between the Service Desk and the requester. The incident ticket is created to detail the issue that is raised by the request.

The Service Desk tries to resolve the issue through investigation and diagnosis.

One of two things can happen:

- A fix (permanent solution) is discovered. It proves to be simple (or involves as much work as a workaround (temporary solution) and can be handled at the current level of support.
- A fix is not known, or, if known, proves to be a complex one that takes a long time to implement. In this case, the requester is provided with a workaround and a problem ticket is created to track the underlying cause.

Although service restoration has the highest priority, consider the risk that a workaround might exacerbate the original incident. For example, certain virus infections might spread beyond their initial scope if a simple service restoration is put into effect.

If the incident and the underlying cause of the incident are resolved, then both the incident and service request tickets are closed.

Because the focus of incident management is to get the requester back to work as soon as possible, the Service Desk devises a temporary workaround. A problem ticket is created to track the permanent fix.

It is important to think of the incident and problem as separate entities. Think of the incident and service request as being connected because they both deal with the requester, but the problem deals strictly with the issue.

Example: The requester is temporarily switched over to another printer (the incident is resolved through a workaround). A problem ticket is created to repair the broken printer.

The problem is fixed. Any temporary workarounds are reversed, and everything is functioning correctly again. All open tickets are closed.

Three scenarios

- The three following scenarios all share the same theme: a requester cannot print a document.
- The underlying cause is different in each case.

Scenario 1: Requester does not know how to print document



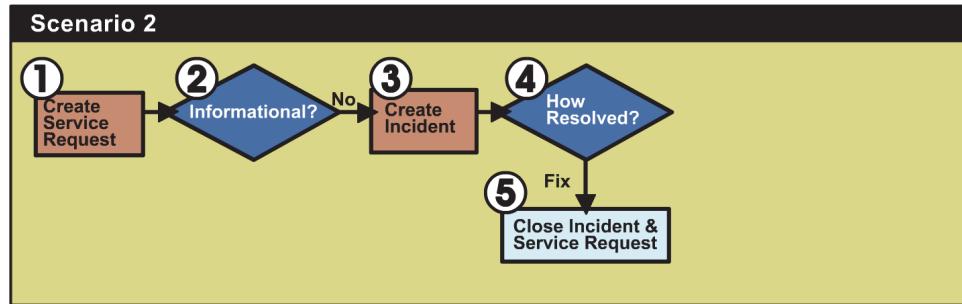
Reported issue: Requester does not know how to print document

Underlying cause: Lack of knowledge

Scenario 1: Requester does not know how to print document

1. The Service Desk receives a call from a requester who does not know how to print a document.
2. The Service Desk tells the requester how to print a document.
3. Because a lack of knowledge is not considered to be an incident, the service request is resolved and the service request ticket is closed.

Scenario 2: Requester receives error message #101



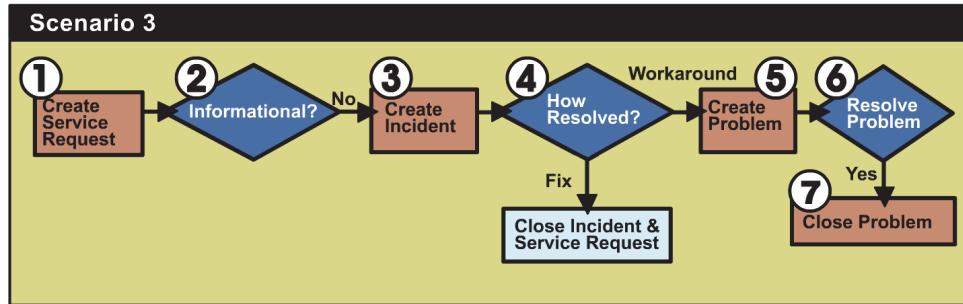
Reported issue: Requester receives error message #101

Underlying cause: *The printer is not online*

Scenario 2: Requester receives error message #101

1. A requester calls the Service Desk and reports error message # 101 when printing a document.
2. Receiving an error while printing is considered an incident and not just a request for information.
3. As a result, an incident ticket is created to track the resolution of the issue.
4. An analyst researches the error code and discovers that the printer is off line. Pressing the Online button on the printer is quick, and completely resolves the requester's issue.
5. The incident and originating service request tickets are closed.

Scenario 3: Requester receives error message #102



Reported issue: Requester receives error message #102

Underlying cause: *The printer is broken*

Scenario 3: Requester receives error message #102

1. A requester calls the Service Desk and reports error message # 102 when printing a document.
2. Receiving an error while printing is considered an incident and not just a request for information.
3. Therefore, an incident ticket is created to track the resolution of the issue.
4. The agent researches the error code and discovers that the printer is broken and needs repair. To get the requester back to work quickly, the Service Desk redirects the requester's computer to use another printer. The service request and incident are closed.
5. A problem ticket is created to track the repair of the printer.
6. The printer is repaired.
7. The problem ticket is closed.

Lesson 2 Request Fulfillment roles

IBM Training



Lesson 2 Request Fulfillment roles

Service requests, Incidents, and Problems

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In this lesson, you learn the various roles within IBM Control Desk that are involved with request fulfillment. After you complete this unit, you can explain the responsibilities of each role.

Roles

Four roles are involved in request fulfillment:

- Requester
- Service desk analyst
- Service desk manager
- Service desk administrator

Not all companies use all roles. It depends on the size of the company: some companies might have one person who performs multiple roles.

Requester

- The **requester** is the person that is contacting the Service Desk.
- Requesters do not need to be users in IBM Control Desk, but they should have a person record.
- A requester might be a self-service user.
- In the lab exercises, the requester is Bob.

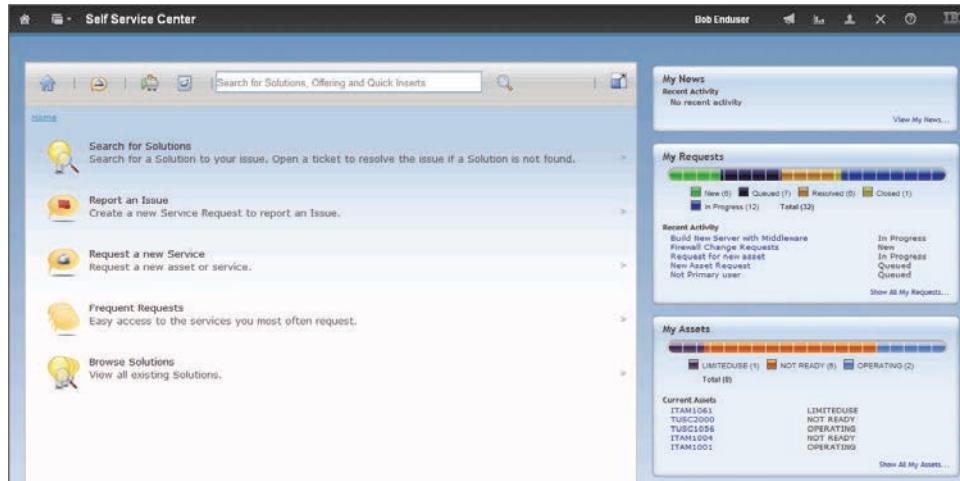
Requester

The requester's responsibilities are as follows:

- Uses IT services to perform business tasks
- Contacts the Service Desk for these items:
 - Information requests
 - Service requests
 - Reporting incidents
- Provides information, as needed, for these items:
 - Submitted incidents
 - Problems that are related to incidents opened by the requester

In your exercises, the requesters are Bob and Steve.

Requester (Self Service Center user) Start Center



Requester (Self Service Center user) Start Center

A self-service user is a special type of requester that has access to the Self Service Center application. These requesters can search for their own solutions, reporting and tracking issues, requesting services, and tracking their assets all within a convenient interface.

Service desk analyst

- The **service desk analyst**, (or service desk agent) is the level 1 person that is working the Service Desk.
- Service desk analysts make initial attempts to resolve service requests.
- Service desk analysts create incidents from service requests.
- In the lab exercises, the service desk analyst is Scott.

Service desk analyst

Service desk analyst Start Center

Bulletin Board: There are currently no bulletin board messages to view.

Inbox / Assignments: No Assignments found for Scott Servdesk Analyst

My Work:

Record	Class	Priority	Description	Reported Date	Status
SR1044	SR	1	Unable to access Oracle Financials	3/5/11 16:15:49	RESOLVED
SR1054	SR	1	Slow responses to help desk	3/7/11 11:06:52	PENDING
SR1055	SR	3	Slow responses to Oracle Financials email	3/7/11 11:06:52	PENDING
TUSC1179	ACTIVITY	2	App Support Server RT23411 has a batch file that has abstended. Please research and support	12/15/11 09:58:23	COMP
TUSC1013	PROBLEM	4	Oracle system appears to be down -website error 404	12/16/11 11:02:45	PENDING
TUSC1033	PROBLEM	4	Oracle system appears to be down -website error 404	12/16/11 11:26:22	PENDING
TUSC1034	PROBLEM	3	Oracle system appears to be down -website error 404	12/16/11 14:28:25	PENDING

1 - 7 of 7

Global Incidents:

Incident	Internal Priority	Summary	Creation Date	Status
INT029	1	Network slow	3/17/11	INPROG
PULSE1016	1	Cell Router #1 is not functional	3/7/12	INPROG
			19/08/07	

Service Desk Group Queue:

Service Request	Class	Summary	Status	Creation Date
SR1337	SR	Cannot resolve network password issue	NEW	8/3/11 16:38:26
SR1388	SR	Air Conditioner broken on 1st floor	NEW	10/1/11 17:18:10
SR1269	SR	Firewall Change Requests	NEW	2/1/12 12:52:16
SR1223	SR	Printers not printing	NEW	2/1/12 12:57:49
SR1099	SR	Security Intrusion Alert on Several PCs at Site 156	NEW	3/1/11 15:02:04
SR1057	SR	Error when installing software	NEW	3/1/11 11:57:34
SR1064	SR	Can not reach Oracle Financial web site	NEW	3/8/11 10:43:36

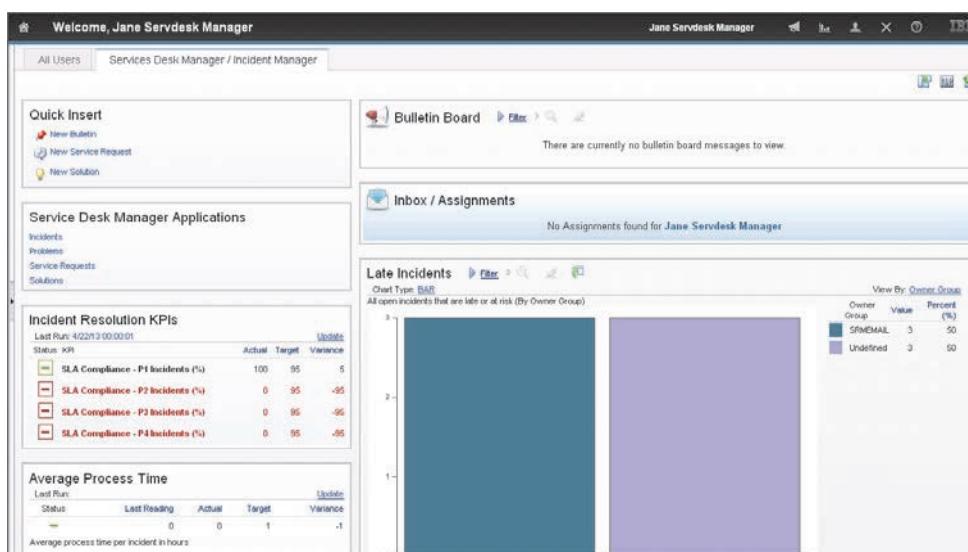
Service desk analyst Start Center

Service desk manager

- The **service desk manager** is responsible for the smooth operation of the Service Desk.
- Service desk managers watch SLA reports, queue statistics, and other reports related to the operation of the service desk.
- In the lab exercises, the service desk manager is Jane.

Service desk manager

Service desk manager Start Center



Service desk manager Start Center

Service desk administrator

- The **service desk administrator** is responsible for system-level administration of the Service Desk.
- Service desk administrators assign security groups and roles for service desk analysts and managers.
- In the lab exercises, the service desk manager is maxadmin.

Service desk administrator

Service desk administrator Start Center

The screenshot shows the Service Request Administrator Start Center. The top navigation bar includes tabs for 'All Users', 'Process Management Requester', and 'Service Request Administrator'. The main area is divided into several panels:

- Quick Insert:** Buttons for 'New User' and 'New Person'.
- Bulletin Board:** A message board stating "There are currently no bulletin board messages to view."
- Inbox / Assignments:** A panel stating "No Assignments found for maxadmin".
- Open Service Requests:** A table listing five open service requests (SR1337, SR1388, SR1047, SR1048, SR1053) with columns for Task ID, Description, Internal Priority, Status, Owner, Owner Group, Target Start, and Target Finish.
- Late Work Orders for all open Service Requests:** A table showing late work orders with columns for Last Run, Status, Last Reading, Actual, Target, and Variance. It indicates 0 late or at-risk work orders from open service requests.
- Gauge Chart:** A semi-circular gauge chart ranging from 0 to 11, with the needle pointing to 0.

Service desk administrator Start Center

Lesson 3 Simple information request scenario

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Lesson 3 Simple information request scenario

Service requests, Incidents, and Problems

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In this lesson, you learn how a Service Request for simple information is handled by the help desk personnel.

After you complete the lesson, you can explain time tracking within a ticket and how to change the status of a ticket as it progresses through the process.

Simple information request scenario

- Bob took some notes in the Windows Notepad application.
- He needs to print the notes, but doesn't know how.
- He calls the Service Desk and speaks with Scott.

Simple information request scenario

Scott, a Service Desk agent, receives a call from a requester who cannot print from Windows Notepad. He can resolve this call without having to search for a solution or refer to any other source of information. He begins by starting IBM Control Desk and logging in.

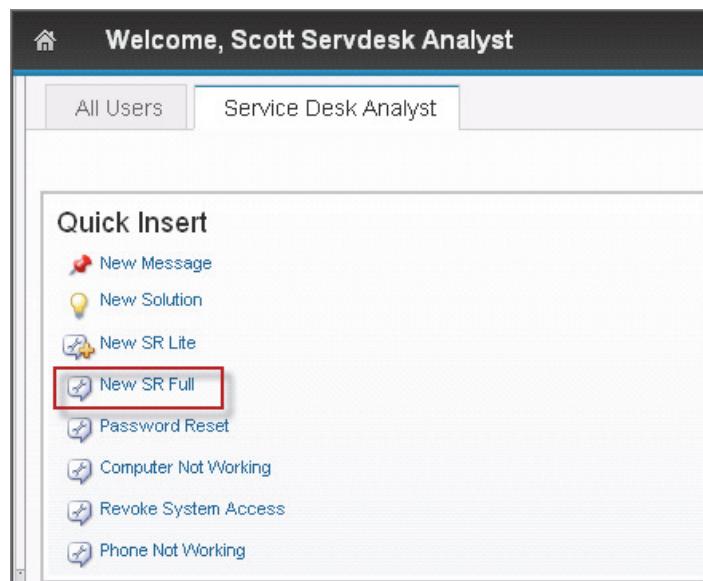
Log in to the system



Log in to the system

Scott logs in to IBM Control Desk. Bob wrote a short note in Windows Notepad, but he cannot figure out how to print it. For Scott, this question is a simple informational request that he can resolve by using his own knowledge.

Create a service request



Create a service request

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

Take ownership

The screenshot shows the IBM Service Request interface. In the top navigation bar, the 'Service Request' tab is selected. On the right side, there is a 'Common Actions' menu with several options: 'New Service Request', 'Save Service Request', 'Clear Changes', 'Change Status', 'Search For Solutions', 'Search For Tickets', 'Select Owner', 'Take Ownership' (which is highlighted with a red box), 'Apply Service Request Template', and 'Start Timer'. Below the menu, the main content area displays a service request with ID 1010. The request has a yellow speech bubble icon and two attachments. The status bar at the bottom shows the following states: New (blue), Queued (green, highlighted with a red box), In Progress, Pending, Resolved, and Closed. The 'Owner' field is populated with 'SCOTT'. The 'Internal Priority' and 'Target Finish' fields are empty.

Service requests, Incidents, and Problems

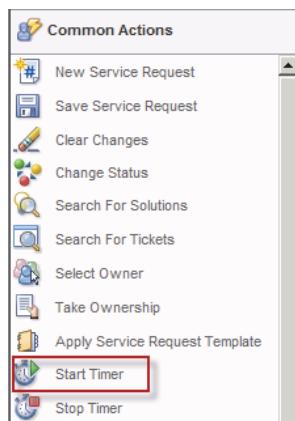
24

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Take ownership

Scott takes ownership by clicking the **Take Ownership** option on the navigation bar. Notice that taking ownership completes the **Owner** field and changes the status to Queued.

Start time tracking



Time Tracking								
Activity	Labor	Name	Approved?	Start Date	Start Time	End Time	Regular Hours	Rate
	SCOTT	Scott Servdesk Analyst		6/4/12	17:36:5		0:00	10.00

Service requests, Incidents, and Problems

25

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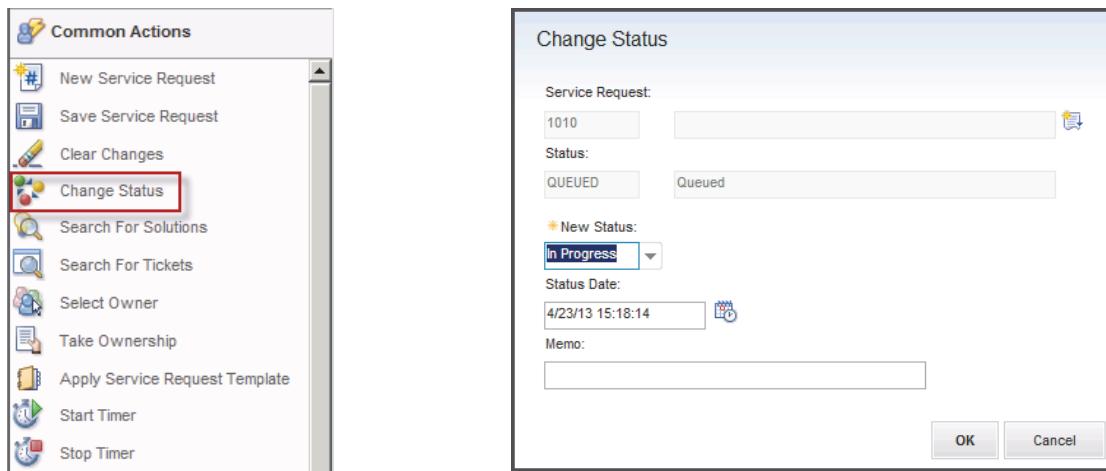
Start time tracking

Scott starts tracking the time that he spends on this request by clicking the Start Timer icon. To check the time that he spent on the ticket, Scott can scroll to the bottom of the ticket and expand the Time Tracking area.



Attention: The time tracking feature is optional and not used in the student exercises.

Change status to show that the ticket is being worked on



Change status to show that the ticket is being worked on

Scott must indicate that the service request is being worked on. He changes the status to In Progress by clicking the Change Status icon on the toolbar.

Enter basic information

User Information

Reported By:	Affected Person:
BOB   	BOB   
Name	Name
Bob Enduser	Bob Enduser
Customer:	
  	  

Service Request Details

Summary:	Service Group:
Printing from notepad   	  
Details:	Service:
Requester does not know how to print from Windows Notepad.	  
	Site:
	PMSCRTP  

Enter basic information

Scott completes the basic fields in the ticket: **Source**, **Reported By**, **Summary**, **Details**, **Priority**, and **Classification**.

Inform the requester

- Now that all the basic fields are populated, Scott can resolve the request. Without having to look 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 if there is an existing solution. (Normally, if there was not an existing solution, Scott should create one.)
- Scott tells Bob to click **File > Print**. Bob does this and tells Scott that it works and he can now print from Notepad.

Verify the resolution

- Scott verifies with Bob that his issue is resolved. He agrees and Scott asks him if he has anything else he needs help with. He says no, so Scott hangs up the phone.
- Scott will indicate what was done and close the ticket.

Create a work log entry

The screenshot shows a software interface titled "Work Logs". At the top, there is a header with columns: Record, Class, Created By, Date, Type, Summary, and Viewable?. A single record is listed: Record 1010, Class SR, Created By SCOTT, Date 4/23/13 15:42:52, Type WORK, Summary "Informed requester", and Viewable? checked. Below the header, there are two main sections: "Summary" and "Details". The "Summary" section contains the text "Informed requester". The "Details" section contains a rich text editor toolbar and a text area with the content "Told Bob how to print his Notepad document.". There are also "Type" and "Viewable?" checkboxes on the right side of the details section.

Create a work log entry

Scott writes what he did on the ticket so that any other agent that views the ticket knows how it was resolved. He creates a work log entry.

Resolve the ticket

Change Status

Service Request:
1010 Printing from notepad

Status:
INPROG In Progress

* New Status:
Resolved

Status Date:
4/23/13 15:48:21

Memo:

OK Cancel

Resolve the ticket

Scott writes what he did on the ticket so that any other agent that views the ticket knows how it was resolved. He creates a work log entry.

Stop the timer

The screenshot shows the 'Common Actions' menu on the left and the 'Confirm Timer' dialog box on the right. The 'Common Actions' menu includes options like New Service Request, Save Service Request, Clear Changes, Change Status, Search For Solutions, Search For Tickets, Select Owner, Take Ownership, Apply Service Request Template, Start Timer, and Stop Timer. The 'Stop Timer' option is highlighted with a red box. The 'Confirm Timer' dialog box contains fields for Ticket Class (SR), Record Key (1010), Start Date (4/23/13), Start Time (14:57:25), Finish Date (4/23/13), Finish Time (15:54:50), Hours (0:57), and a checkbox for Complete Workorder?.

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32

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Stop the timer

If your security group has permission to display it, the tracked labor shows up on the **Activities** tab of the Service Requests application.

Lesson 4 Solution lookup scenario

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Lesson 4 Solution lookup scenario

Service requests, Incidents, and Problems

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In this lesson, you learn how to search the Control Desk application's repository of existing information.

Solution lookup scenario

- Bob is receiving a 404 error in Oracle Financials.
- He calls the Service Desk and speaks with Scott.

Solution lookup scenario

In this scenario, Scott receives a call from Bob, who wants to know whether the slow response from a server is a known issue. He must search for an existing solution.

Scott asks Bob if he wants to open an incident to report the slow performance. Bob says not if it is a known issue. He already has a ticket open and wants to know whether the server he is trying to reach is also part of the issue.

Perform initial steps

Scott performs the following tasks:

- Creates a new service request
- Starts time tracking
- Takes ownership
- Marks the ticket as In Progress
- Enters the basic information

Search for the solution

The screenshot shows the 'Common Actions' menu on the left and the 'Search For Solutions' search interface on the right. The 'Search For Solutions' interface includes fields for 'Search Terms (optional)' (containing 'oracle'), 'Classification', and 'Type'. The search results table shows one result: SPOC1295 Oracle Financials Access - 404 Error.

Solution	Description	Times Applied	Priority
SPOC1295	Oracle Financials Access - 404 Error	0	0

Service requests, Incidents, and Problems

36

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Search for the solution

Scott hears about network problems often. He must verify that a network issue matches Bob's question. He knows that his company records known network issues in the solution database for easy search.

Scott clicks the Search Solutions icon on the menu bar. He can see that there is an existing solution titled Network Slow Response at Southern Sites. He views the resolution, and it seems to be a match.

Try the solution

The screenshot shows the 'Solution Details' tab selected in the top navigation bar. The main area contains fields for 'Service Request' (1011), 'Solution' (SPOC1295, Oracle Financials Access - 404 Error), and 'Solution Status' (CONSIDER). There is also a 'Site' dropdown set to PMSC RTP and a 'Self-Service Access?' checkbox. A note at the top states: 'You can apply a solution to the Incident, and set a status as to how this applied solution performed for this ticket. Solutions marked as 'Solution Failed' will be'. Below the form is a rich text editor toolbar.

Try the solution

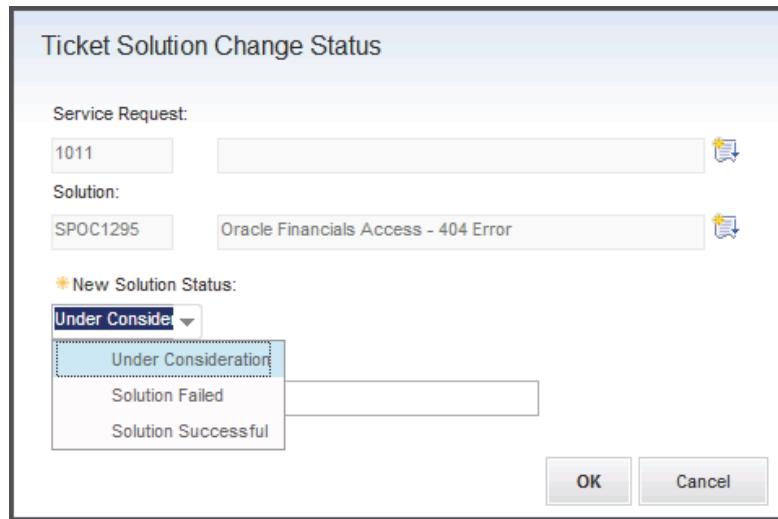
Scott talks to Bob and asks him to verify the site of the server. He also asks Bob to run a few commands to verify that the issue is present, and it is. Because this solution resolved the request, Scott applies the solution to the ticket.

He clicks Use Solution and sees a quick message at the top of the screen that informs him that the solution was applied.

Verify the resolution

- Scott verifies with Bob that his issue is resolved.
- He agrees and Scott asks him if he has anything else he needs help with. He says no, so Scott hangs up the phone.

Solution status



Solution status

When a solution is applied to a ticket, the status of the solution is tracked also. A solution is under consideration until it is determined whether the solution fails or succeeds.

Perform closing steps

- Now that the request is resolved, Scott can perform all the steps involved in closing a ticket.
- Scott performs the following steps:
 - Creates a work log entry
 - Sets the ticket status to Resolved
 - Stops logging his time

Perform closing steps

Scott returns to the Start Center and continues working.

Lesson 5 Solution creation scenario

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Lesson 5 Solution creation scenario

Service requests, Incidents, and Problems

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In this lesson, you learn how solutions are created and how to apply a solution to a ticket. When you complete the lesson, you can create new solutions to enhance the value of the ICD data repository.

Solution creation scenario

- Bob does not know how to print a report from the PayrollMaster software.
- He calls the Service Desk and speaks with Scott.

Solution creation scenario

In this scenario, Scott receives a call from Bob, who cannot print from another application, PayrollMaster. Because there is no existing solution, Scott must create one.

The call sounds like a simple informational request, and Scott is familiar with the PayrollMaster program.

Perform initial steps

Scott performs the following steps:

- Creates a new service request
- Starts time tracking
- Takes ownership
- Marks the ticket as In Progress
- Enters the basic information

Perform initial steps

Resolve the request

- Scott tells Bob to print using the **Reporting > Print** menu item in the PayrollMaster application. He tries this and is able to print.
- Scott verifies with Bob that his issue is resolved. He agrees and Scott asks him if he has anything else he needs help with. He says no, so Scott hangs up the phone.

Resolve the request

Create a solution

Service Request Activities Related Records Solution Details Log

Service Request: 1006 Printing from PayrollMaster

Solution:

Symptom:

Cause:

Resolution:

To print from PayrollMaster, click Reporting > Print

Create a solution

Scott knows how to print from the PayrollMaster application, but he understands that not everyone will. He must confirm that there is an existing solution, and if there is not one, he creates one. Then, the next time this problem occurs, the agent who answers the telephone will know how to handle it.

Going to the **Solution Details** tab, Scott types To print from PayrollMaster, clicks **Reporting > Print** into the **Resolution** field. Informational solutions like these do not use the **Symptom** and **Cause** fields.

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

Perform closing steps

- Now that the request is resolved, Scott can perform all the steps involved in closing a ticket.
- He performs the following steps:
 - Creates a work log entry
 - Sets the ticket status to resolved
 - Stops logging his time

Perform closing steps

Scott returns to the Start Center and continues working.



Attention: Remember that closing a ticket means placing it in either Resolved or Closed status.

Lesson 6 Complex issue scenario

IBM Training



Lesson 6 Complex issue scenario

Service requests, Incidents, and Problems

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In this lesson, you will follow an issue from the time the help desk is notified through the creation of additional ticket types as it becomes more apparent that it is not a simple scenario. The incident requires the creation of an incident and finally a problem ticket before being resolved.

When you complete the lesson, you can perform these tasks:

- Open a service request
- Manage time tracking
- Change the ticket's status
- Complete the fields required within the incident and problem applications
- Generate other ticket types while relating them to existing ticket types so that anyone reviewing the artifacts within Control Desk can see a full representation of the order of events during the issue's lifecycle

Receive the call

- Bob Enduser notices that his computer is running slow. He reboots, defrags the hard disk, and finally decides to call the help desk.
- Bob calls the company support line and Scott answers the call.
- Bob explains the issue to Scott.

Receive the call

This scenario covers the service request portion of the **Service Request > Incident > Problem** process.

Bob has another issue that he must resolve. His computer is running slowly, even after he performs the usual initial troubleshooting steps.

As Scott, 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.

Perform initial steps

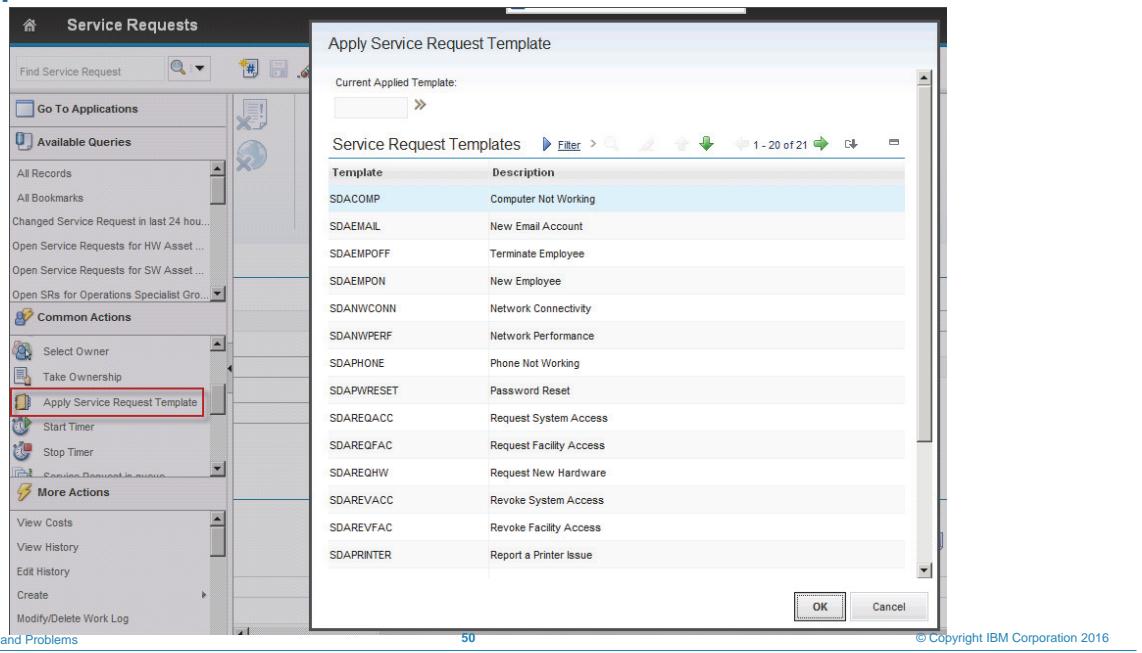
Scott performs the following steps:

- Creates a new service request
- Starts time tracking
- Takes ownership
- Marks the ticket as In Progress
- Enters the basic information

Perform initial steps

In addition to the basic information, because this request deals with a specific asset, Scott adds Bob's notebook to the ticket as an asset.

Ticket templates



Ticket templates

Scott wants to create service requests that are consistent for the same types of issues, and he also wants to save some time. By clicking the **Apply Service Request Template** menu option, Scott can look for a ticket template that he can use to automatically populate some fields.

He discovers a template with the name of **Computer Not Working** and applies it.

Issue specific information

Service Request Details

Summary: <input type="text" value="Notebook computer running slowly"/>	Service Group: <input type="text"/>
Details: <input type="text" value="Bob reports that his notebook is running slowly."/>	Service: <input type="text"/>
Customer Charge Account: <input type="text"/>	Site: <input type="text"/>
Customer Cost Center: <input type="text"/>	Asset: <input type="text"/> ITAM1004 Lenovo Thinkpad T61
Classification Path: <input type="text" value="21\2101\210102"/>	Location: <input type="text"/> NEWYORK New York Office
Class Description: <input type="text" value="IT Issue \ Hardware \ Laptop"/>	Configuration Item: <input type="text"/>
Internal Priority: <input type="text"/>	Source: <input type="text" value="SELFSERVICE"/>

Issue specific information

Notice that the following fields are automatically completed:

- Classification
- Class Description

You can customize templates with pre-approved data, which reduces the time it takes to complete common tickets.

Initial investigation

- Scott will search all existing solutions to try to solve Bob's issue as soon as possible.
- However, Scott can already tell that this is a complex issue that will probably require him to create an incident.

Search existing solutions

The screenshot shows the 'Search For Solutions' application window. At the top, there is a 'Common Actions' menu with options like 'Clear Changes', 'Change Status', 'Search For Solutions' (which is highlighted with a red box), 'Search For Tickets', 'Select Owner', and 'Take Ownership'. Below the menu is a search interface with tabs for 'Search Existing Solutions' and 'Search External Knowledge Base'. A search term 'hardware' is entered in the search bar. There are filters for 'Classification', 'Asset', and 'Configuration Item'. The search results table shows one hit: 'SPOC1028 How to order hardware or software 0'. The table has columns for Solution, Description, Times Applied, Priority, % Effectiveness Score, Status Creation Date, % Effectiveness Score, Changed Date, and In Attachment. The status creation date is listed as 3/9/11 17:12:15 and the changed date as 3/25/11 17:38:23. At the bottom right of the window is a 'Close' button.

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55

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Search existing solutions

Scott starts the Search For Solutions application. He first tries searching with the word *hardware*. There is a hit, but it does not apply. He tries other searches, but finds nothing that helps.

Search for tickets

Search For Tickets

Search Incidents **Search Service Requests** Search Problems

Search service requests. Use one or more of the following fields to specify search criteria [More information](#)

Search Terms (optional):

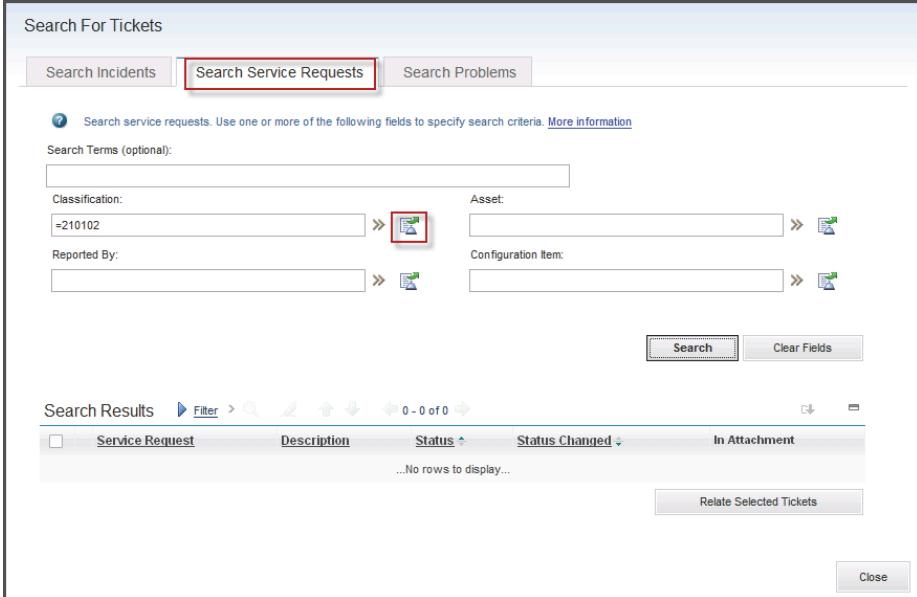
Classification: Asset:

Reported By: Configuration Item:

Search **Clear Fields**

Search Results **Filter** > 0 - 0 of 0
 Service Request **Description** **Status** **Status Changed** **In Attachment**
...No rows to display... **Relate Selected Tickets**

Close



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54

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Search for tickets

Another method that Scott can try is to look for tickets that are similar to this ticket. Perhaps this issue is documented in another ticket, and no one created a solution for it.

Scott clicks **Search For Tickets** on the navigation bar. He selects the **Search Service Requests** tab and clicks the icon to copy the Classification from the current ticket. No similar tickets are found.

Global Search

Global Search

Search Solutions Search Incidents Search Service Requests Search Problems Search External Knowledge Base

?

Use one or more of the following fields to specify search criteria. [More information](#)

Search Terms (optional):

Classification: »

Type: »

Asset: »

Configuration Item: »

Search Results Filter > 1 - 1 of 1

Solution	Description	Times Applied	Priority	% Effectiveness Score	Changed Date	In Attachment
SPOC1028	How to order hardware or software	0			9/25/11 17:38:23	

Global Search

The Global Search application combines the ability of tickets and solutions into one application.

Search results

Search Results 1 - 5 of 16

Solution	Description	Times Applied	Priority	% Effectiveness Score	Changed Date	In Attachment
SPOC1042	Network Slow Response at Southern Sites	2		100	7/12/11 15:41:06	
TUSC1002	Billing System Performance degradation	2		100	3/21/12 18:50:56	
SPOC1025	Corporate network account password reset	0			9/14/11 14:12:19	
SPOC1027	How to release a software license	0			8/8/11 11:00:14	
SPOC1028	How to order hardware or software	0			9/25/11 17:38:23	

Solution Details

Solution: SPOC1042 Author: NANCY

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

Cause:
Peak loads on WAN link to Southern sites are causing intermittent slow responses on all applications. Change been opened to implement additional capacity. ETA still to be determined based upon parts and engineer availability.

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Search results

There are various hits in solutions, incidents, and service requests. Scott looks at the details for each hit and cannot find anything helpful.

Scott did not find a quick solution to Bob's issue. He must escalate this issue to a higher level of support. Scott tells Bob that Support will fix his issue as soon as possible and gives him the service request ticket number for his reference.

Add a work log entry

The screenshot shows the 'Work Logs' interface. At the top, there are tabs for 'Work Log' and 'Communication Log'. Below the tabs is a toolbar with icons for filter, search, and navigation. A grid displays log entries with columns for Record, Class, Created By, Date, Type, Summary, and Viewable?. One entry is selected, showing details in a large text area. The 'Details' section contains fields for Record (1015), Class (SR), Created By (SCOTT), Date (5/15/13 21:28:09), Type (WORK), and a summary field containing the text: 'I spoke with Bob on the phone. His notebook is running slowly when accessing the billing application. He has tried defragging his hard drive and rebooting.' There is also a 'Viewable?' checkbox.

Add a work log entry

After setting the priority, 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.

Create an incident

The screenshot shows the 'Service Requests' application interface. At the top, there's a navigation bar with 'Service Requests' and various icons. Below it is a toolbar with buttons for 'Find Service Request', search, and other actions. On the left, there's a sidebar with 'Available Queries' and 'Common Actions'. Under 'Common Actions', the 'Create Incident' button is highlighted with a red rectangle. The main area shows a service request titled '1015' with a yellow speech bubble icon. To the right is a 'Notebook' section with tabs for 'Own' and 'Owner Grp', and a 'New' button. Below the notebook is an 'Address Information' section with fields for 'Service Address' and 'Formatted Address'. At the bottom, there's a footer with copyright information.

Create an incident

Scott now must create an incident ticket so that the incident team can work on the issue. He creates it from within the service request to create a relationship between the two tickets.

View related records

The screenshot shows the IBM Service Request Management interface. At the top, there are tabs: List View, Service Request, Solution Details, Activities, Related Records (which is selected), Log, Service Address, and Map. Below the tabs, there are fields for Service Request (1015) and Description (Notebook computer running slowly). There are also Site and Status fields (Status: QUEUED). A search bar and a map icon are also present. The main area is titled 'Related Tickets' and shows a single result: '1001 >> Notebook computer running slowly'. The table has columns: Related Record Key, Description, Class, Status, and Relationship. The 'Relationship' column for this row contains 'FOLLOWUP' and is highlighted with a red box. Below this table, there is a 'Details' section with fields for Related Record Key (1001), Description (Notebook computer running slowly), Class (INCIDENT), Status (QUEUED), and Relationship (FOLLOWUP).

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59

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View related records

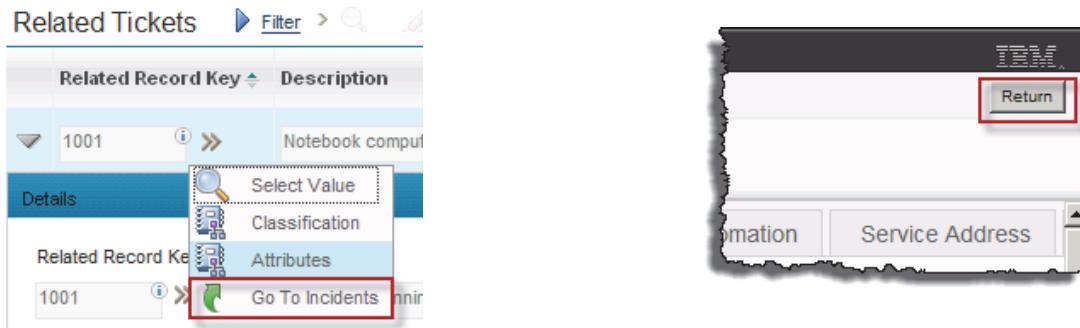
Scott goes to the **Related Records** tab to see the incident that was created. It has a status of Queued and its relationship to the service request is Followup.

This relationship is important for two reasons:

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

Also, many of the service request fields were copied to the incident, saving time.

Temporary jump to incident



Temporary jump to incident

Scott clicks the Detail Menu icon on the right side of the **Related Record** field and selects **Go To Incidents**.

The Incident application opens, but there is one other difference: the menu bar is now empty except for one item marked **Return**. Clicking **Return** takes you back to the Service Requests application.

Scott sets the incident's **Priority** fields.

Delegate the ticket

Select Owner

Persons Person Groups

Person Group:

Date:

Persons	Filter >			
Person Group	Person	Name	Shift	Open Work
CHAT_Q	MAXADMIN	maxadmin	2	
ITAMFRNIM	ARUN	Arun Financial Analyst	0	
ITAMHAM	ITAMHAM	ITAMHAM	0	
ITAMINVN	ELMO	Elmo Inventory Admin	0	
ITAMSAM	ITAMSAM	ITAMSAM	0	
PMCFGADM	PMCFGADM	PMCFGADM	0	
PMCFGAUD	PMCFGADM	PMCFGADM	0	
PMCFGLIB	PMCFGADM	PMCFGADM	0	
PMCFGMGR	PMCFGADM	PMCFGADM	0	
PMCHGANA	MAXADMIN	maxadmin	2	

Service requests, Incidents, and Problems

61

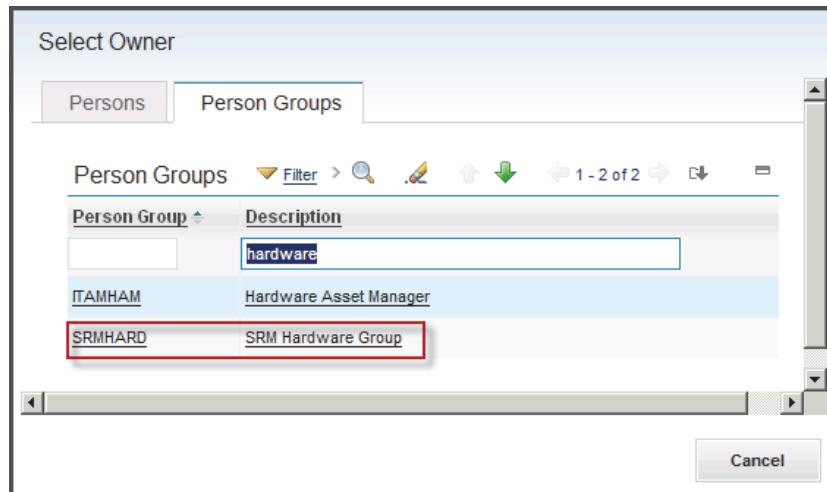
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Delegate the ticket

Scott opens the Select Owner window. It opens with the **Persons** tab selected. If Scott wanted to delegate the ticket to a specific person, he could make the delegation here. However, Scott just wants to transfer the incident to anyone in the Incident group.

He selects the **Person Groups** tab.

Person Groups tab



Person Groups tab

Scott selects the SRM Hardware Incident group, SRMHARD.

Incident ticket changes

Owner Group:	Status:
SRMHARD	QUEUED
Created By:	
SCOTT	

Incident ticket changes

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

Scott returns to the service request.

Enter time

The Timer is going to record the time you have spent managing your
Ticket Class:
INCIDENT
Record Key:
1003
Review the information below before submitting.
You may update the values and click 'OK' to submit.
Click 'Cancel' to return to the record; the Timer will continue to run.
Start Date:
6/4/12
Start Time:
19:04:5
Finish Date:
6/4/12
Finish Time:
19:35:2
Hours:
0.31

Enter time

Scott's work with the service request is finished; so he records his time. Scott then returns to the Start Center. Finished with his portion of the issue, he works on other tickets.

Lesson 7 Incident management overview

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Lesson 7 Incident management overview

Service requests, Incidents, and Problems

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In this lesson, you learn the steps involved in managing an incident.

When you complete the lesson, you can determine if an incident should be considered *major*, and you can determine if and when you can apply a *workaround*.

Incident

- An **incident** is a deviation from the expected standard operation of a system or service. When the requester is calling to report that something is not working right, that is an incident.
- The incident covers the requester's interaction with a problem, not the problem itself.

Major incident

- The definition of what qualifies as a major incident varies from company to company. One common definition is any incident that has a high priority, affects many people, and needs detailed root cause analysis.
- Major incidents usually share the following characteristics:
 - Dedicated team that is required to handle the incident
 - Reduced time scales
 - Greater urgency

Workarounds and fixes

Methods for restoring service:

- A **workaround** involves getting around the fault without actually fixing it.
- A **fix** is a solution to the fault, and can be a procedure or software that should be used.

Incident management basics

- The primary objective of incident management is to get the user up and running as quickly as possible.
- This process might involve providing a workaround or fix. However, it does not necessarily mean getting to the root of what caused the incident (that process is handled by problem management).
- Fix the customer, not the problem.

Incident management example

- A requester's computer freezes and he calls the Service Desk. The Service Desk creates a service request. After hearing the requester's issue with the computer, the Service Desk creates an incident ticket.
- The Service Desk tells the requester to reboot. It works, the requester can get back to work, and the incident is resolved.
- A few days later, his computer freezes again. Looking at previous tickets, the Service Desk notices that it also happened a few days before.
- The Service Desk creates a **problem** ticket (linked to the incident ticket), because rebooting the computer only solves the incident temporarily. It does not fix the root cause of whatever is making the computer freeze.

Incident management objectives

The incident management process includes the following objectives:

- Following interruptions, IT service is rapidly restored.
- Workarounds are created to resolve similar service interruptions.
- IT service availability is sustained at a high level.

Lesson 8 Global issues

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Lesson 8 Global issues

Service requests, Incidents, and Problems

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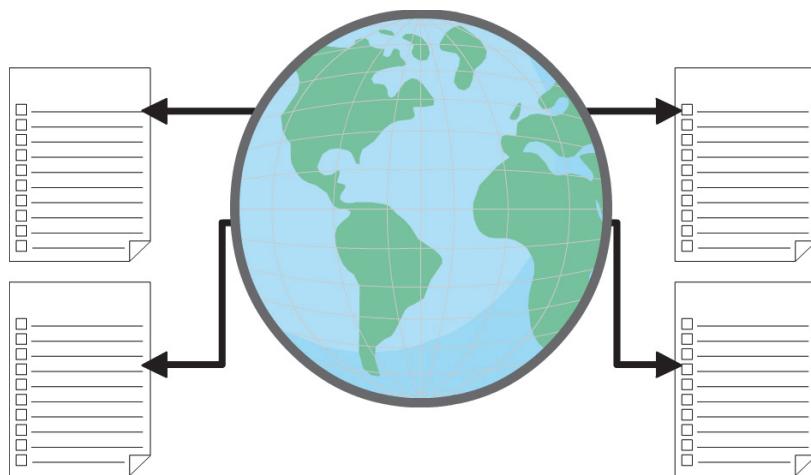
In this lesson, you learn what types of tickets can be considered global issue; you learn how to mark an issue as global within Control Desk; and you learn how to associate follow-on tickets with the global-issue ticket.

When you complete the lesson, you can create a global-issue ticket and configure follow-on tickets within Control Desk to be automatically updated and closed by linking them with the original global issue.

Global issue: Definition

A **global issue** is an incident or problem that potentially affects multiple users, or is likely to be the root cause of additional issues.

Relating other records to global issues



Lesson 9 Event management

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Lesson 9 Event management

Service requests, Incidents, and Problems

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In this lesson, you learn what types of products can *feed* Control Desk to automatically create incidents. You learn about integrating other IBM or third-party products with Control Desk through the use of the Email listener.

When you complete this lesson, you can explain the email listener and how it works.

Event management basics

- Incidents can come not only from requesters, but also from the event management process.
- Event management** can be described as software that monitors servers, workstations, and network devices for routine and non-routine events.
- Event management software can automatically open incident tickets in the SmartCloud Control Desk.
- The automated opening of Service Desk tickets in response to events accelerates the resolution process. It reduces mean time to repair and sometimes solves a problem before it is reported or becomes worse.

Event management basics

OMNIbus integration

Serial	Node	Count	Last Occurred	Summary
1992	orc:ORACLEAPACHE...	1	6/28/08 10:4...	ITM_DRC_DB[Total_DB_Size<>0.00 OR Total_Table_Spaces<>0] ON orc:ORACLEAPAC...
2395	IBM-P520KUX	1	6/30/08 1:22...	ITM_UX_file[Avail_Swap_Space_MB<>0 OR Used_Swap_Space_MB<>0] ON IBM-P520K...
2589	netcool	4901	7/5/08 3:17:5...	Probe Heartbeat Message (Probe: mtrapd, Host: netcool, ObjectServer: NCOMS)
2590	netcool	4899	7/5/08 3:17:1...	syslogd probe on netcool: No syslog messages received for 60 seconds
2781	IBM-P520PX	28	7/6/08 3:17:5...	ITM_UX_Proc[Transfers_Bytes_per_Sec<>0] ON IBM-P520PX (Transfers_Bytes_per_Sec)
2783	netcool.LZ	1	7/5/08 3:05:5...	ITM_Test_Disk[Space_Available<>0 OR Space_Used<>0] ON netcool.LZ (Space_Availab...

OMNIbus integration

Lesson 10 Incident roles

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Lesson 10 Incident roles

Service requests, Incidents, and Problems

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In this lesson, you learn the various roles within IBM Control Desk that are involved with Incident Management. When you complete this unit, you will be able to explain and perform the responsibilities of each role.

Incident management roles

There are four roles that are used in incident management:

- Incident analyst
- Incident manager
- Incident administrator
- Incident owner

Incident analyst

The **incident analyst** determines what is required to solve incidents and initiates appropriate actions. These actions can include:

- Performing problem determination
- Creating a workaround, if applicable
- Executing a resolution, if applicable
- Updating the incident reporting system with the workaround or permanent resolution information
- In the lab exercises, the incident analyst is Nancy.

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Incident analyst Start Center

Quick Insert

- New Service Request
- New Incident
- New Problem
- New Change
- New Solution

Incident Analyst Applications

- Service Requests
- Incidents
- Problems
- Changes
- Solutions

Global Incidents

Incident	Summary	Creation Date	Status
IM1029	Network slow	3/7/11 11:00:14	INPROG
PULSE1016	Call Relay #1 is not functional	2/7/11 19:06:07	INPROG

Known Problems

Ticket ID	Description	Creation Date	Status
SRM1000	Connection problem with email server		

Group Work Queue

Incident	Summary	Internal Priority	Status	Owner	Owner Group	Target Start	Target Finish
IM1067	Forgot Email Password	3	QUEUED	SRMEMAIL		10/12/11 17:10:21	
IM1088	Inbox Quota Exceeded - Need more space	3	QUEUED	SRMEMAIL			

My Late Work

Ticket ID	DESCRIPTION	Internal Priority	Status	Owner	Owner Group	Target Start	Target Finish
SRM1027	Browser issue with OnePin	3	INPROG	NANCY	SRMEMAIL	5/16/11 17:40:51	
SRM1015	User can't access his email	2	QUEUED	NANCY	SRMEMAIL	10/15/07 11:26:00	10/15/07 12:36:00
SRM1000	Connection problem with email server	2	QUEUED	NANCY	SRMEMAIL	10/10/07 22:54:00	10/10/07 12:54:00

My Open Work

Ticket ID	Description	Creation Date	Status
-----------	-------------	---------------	--------

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81

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Incident analyst Start Center

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Incident manager

- The **incident manager** is responsible for the smooth operation of the Service Desk.
- Incident managers watch SLA reports, queue statistics, and other reports related to the operation of the service desk.
- In the lab, the incident manager is Jane.

Service requests, Incidents, and Problems

82

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Incident manager

Incident manager Start Center

The screenshot shows the 'Welcome, Jane Servdesk Manager' screen. At the top left is a 'Quick Insert' panel with options: New Bulletin, New Service Request, and New Solution. Below it is a 'Service Desk Manager Applications' section with links to Incidents, Problems, Service Requests, and Solutions. The main area features several dashboards: a 'Bulletin Board' showing no messages, an 'Inbox / Assignments' section stating 'No Assignments found for Jane Servdesk Manager', and a 'Late Incidents' chart. The 'Late Incidents' chart displays 3 open incidents for the owner group 'SRMEMAIL' and 3 for 'Undefined'. Other sections include 'Incident Resolution KPIs' and 'Average Process Time'.

Service requests, Incidents, and Problems

83

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Incident manager Start Center

Incident administrator

- The **incident administrator** is responsible for system-level administration of the Service Desk.
- Incident administrators assign security groups and roles for service desk analysts and managers.
- In the lab, the service desk manager is pmincadmusr.

Service requests, Incidents, and Problems

84

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Incident administrator

Incident administrator Start Center

Ticket ID	Description	Internal Priority	Status	Owner	Owner Group	Target Start	Target Finish
IM1057	Forgot Email Password	3	QUEUED	SRMEMAIL	SRMEMAIL	10/12/11	17:10:21
IM1088	Inbox Quota Exceeded - Need more space	3	QUEUED				
IM1027	Browser issue with OracleIn	3	INPROG	NANCY		3/18/11	17:40:51
IM1026	Can't access Oracle Financials	3	INPROG	NANCY			
IM1029	Network slow	1	INPROG	NANCY			

Incident owner

- The **incident owner** oversees all activities that are related to the assigned incident.
- Responsible for the overall handling of a specific incident
- Brings in appropriate analysts and specialists as needed
- Ensures that the incident is resolved and closed
- In the lab, the incident owner is pmincownusr.

Incident owner Start Center

The screenshot shows the 'Incident owner Start Center' interface. At the top left is a 'Quick Insert' panel with links to 'New Incident', 'New Service Request', and 'New Solution'. Below it is a 'Favorite Applications' section with links to 'Incidents', 'Problems', 'Service Requests', and 'Solutions'. The main area features several cards: 'Open Incidents' (Status: Last Reading 0, Actual 0, Target 5, Variance -5), 'My Late Incidents' (No Data Found), 'My Open Incidents' (No Data Found), and a 'Bulletin Board' card stating 'There are currently no bulletin board messages to view.' A large gauge chart at the bottom indicates performance levels from 0 to 20, with the needle pointing to approximately 10.

Lesson 11 Incident management scenario

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Lesson 11 Incident management scenario

Service requests, Incidents, and Problems

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In this lesson you learn the steps involved in managing an incident within IBM Control Desk.

When you complete this lesson, you can perform these tasks:

- Create (open) an incident ticket
- Make it a global issue
- Review existing data to gather additional information
- Create work logs
- Look at related records
- Apply workarounds
- Determine when to escalate the call through the creation of problem records

The incident team receives the incident ticket

- Incident queues work the same as Service Request queues.
- Which ticket is chosen depends on rules and priorities.

The incident team receives the incident ticket

Open the incident

The screenshot shows two main sections of the IBM Service Portal:

- Inbox / Assignments:** A section titled "Inbox / Assignments" with a message "No Assignments found for **Nancy Incident Analyst**".
- Group Work Queue:** A table titled "Group Work Queue" showing three incidents:

Incident	Summary	Internal Priority	Status	Owner	Owner Group	Target Start	Target Finish
1001	Notebook computer running slowly	1	QUEUED		SRMHARD		
IM1087	Forgot Email Password	3	QUEUED	SRMEMAIL		10/12/11	17:10:21
IM1088	Inbox Quota Exceeded - Need more space	3	QUEUED	SRMEMAIL			

Open the incident

Gather background information

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

Gather background information

View incident details

Incident Details

Summary:

Notebook computer running slowly



Details:

Bob reports that his notebook is running slowly.

View incident details

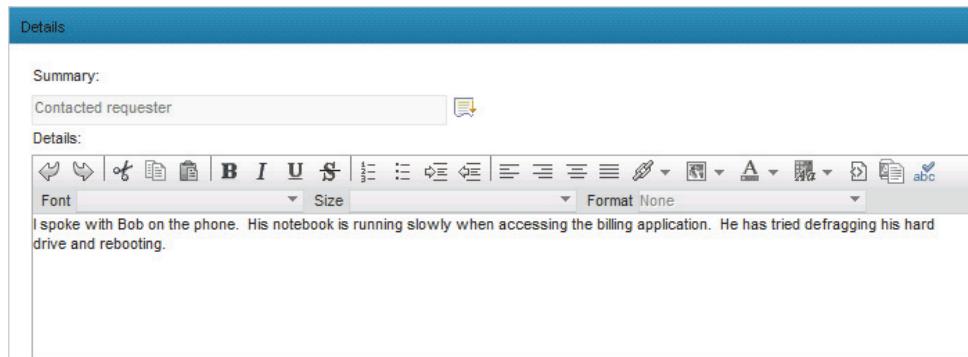
Check the logs

Details

Summary:
Contacted requester

Details:

I spoke with Bob on the phone. His notebook is running slowly when accessing the billing application. He has tried defragging his hard drive and rebooting.



Check the logs

Look at related records

Related Tickets 1 - 2 of 2

Related Record Key	Description	Class	Status	Relationship
1015	Notebook computer running slowly	SR	QUEUED	ORIGINATOR

Select Value
Classification
Attributes

Search For Tickets Select Ticket New Row

Related Work 0 - 0 of 0



Look at related records

Define global issue

The screenshot shows the 'Define global issue' dialog box overlaid on the main application window. The dialog has a title 'Global Issues' and contains the following fields:

- A question mark icon followed by the text: 'Indicate if this is a global issue (root cause). Select the root cause if this is not a global issue.'
- A checkbox labeled 'Is Global Issue?'. This checkbox is checked.
- A text input field labeled 'Related to Global ID:' with a double arrow button to its right.
- A text input field labeled 'Global Class:' with a magnifying glass icon to its right.
- Buttons for 'OK' and 'Cancel' at the bottom right.

Define global issue

Search for similar tickets

The screenshot shows the 'Search For Tickets' interface. The search form includes the following fields:

- Classification: +210102
- Asset:
- Configuration Item:
- Status: (checkboxes for 'Show only global incidents that are not in CLOSED or RESOLVED state' and 'Show only incidents that are not in CLOSED or RESOLVED state')
- Only show active global incidents? (checkbox)
- Only show open incidents? (checkbox)

At the bottom, there are 'Search' and 'Clear Fields' buttons. Below the search form is a table titled 'Search Results' with the following columns:

Is Global?	Incident	Description	Status	Status Changed	In Attachment
...No rows to display...					

Buttons for 'Relate Selected Tickets' and 'Close' are also present.

Search for similar tickets

The incident analyst's diagnosis

- 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 currently using a backup server instead of the main billing server.

The incident analyst's diagnosis

Provide the requester with a workaround

- 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.

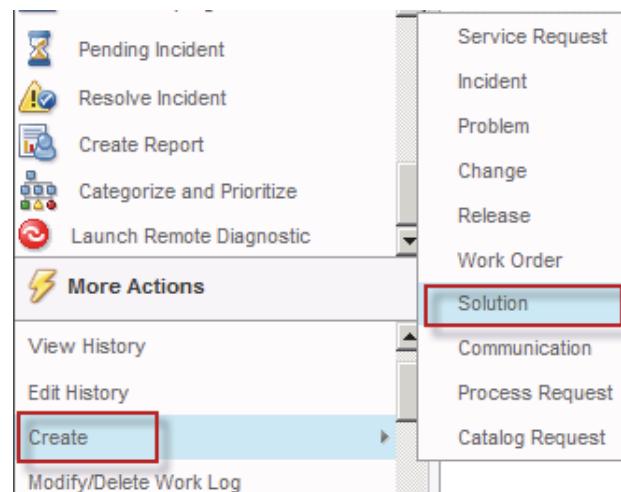
Provide the requester with a workaround

Create a solution specific to the incident

- **Description** Fix for slow billing server performance
- **Symptom** Client experiences slow notebook performance in billing application
- **Cause** Logged in to malfunctioning server
- **Resolution** Verify user is logged into primary server. Try logging into a different server.

Create a solution specific to the incident

Create a general solution



Create a general solution

Send a communication

Even though Nancy has just talked with Bob on the phone, company policy states that when an incident is resolved, an email communication is sent.

Service requests, Incidents, and Problems

101

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Send a communication

Apply a template

The screenshot shows two windows side-by-side. On the left is the 'Create Communication' dialog, which includes fields for 'Template' (with a browse button), 'To' (bob@tivoli.edu), 'cc', 'bcc', 'Subject', and a rich text 'Message' editor. On the right is a 'Select Value' window showing a list of templates with their descriptions. The 'INCRESRB' template is highlighted with a red border, indicating it is selected.

Template	Description
incident	Template for Inbound email for new Incident
LSNRINCI	Template for Inbound email for update Incident
LSNRINUI	Incident is assigned
CTINCASN	Incident creation template
INCREATED	Incident assign to group template
INCASGNGRP	Incident assign to person template
INCASGNPER	Incident closed (to requestor)
INCLLSRB	Incident closed (to assignee)
INCCLSOWN	Incident resolved (to requestor)
INCRESRB	Incident resolved (to assignee)
INCRESOWN	Incident resolved (to assignee)

Service requests, Incidents, and Problems

102

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Apply a template

Add a new work log entry

Details

Summary:
Changed billing server

Details:

Font Size

Bob's notebook is now using the primary billing server.

Add a new work log entry

Create a problem ticket

Nancy creates a problem ticket to ensure the root issue is resolved.

Create a problem ticket

Assign priority

Reported Priority:

2

Impact:

3 Medium

Urgency:

2 High

Internal Priority:

2 High

Assign priority

Delegate the problem ticket

Select Owner

Persons Person Groups

Person Group:
SRMHARD

Date:

Refresh

Persons Filter > 1 - 2 of 2

Person Group	Person	Name	Shift	Open Work
SRMHARD	NANCY	Nancy Incident Analyst	16	
SRMHARD	SCOTT	Scott Servdesk Analyst	6	

Cancel

Delegate the problem ticket

Resolve the incident ticket

- Because the incident is resolved, Nancy must close the ticket.
- She stops the timer and sets the ticket to Resolved. Because of the relationship between the incident and service request, the service request status is automatically set to Resolved.
- Nancy returns to the Start Center and begins working on other tickets.

Lesson 12 Problem management overview

IBM Training



Lesson 12 Problem management overview

Service requests, Incidents, and Problems

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In this lesson, you learn about Problem Management in IBM Control Desk.

When you complete this lesson, you can describe and define a Problem and know when to create a problem record.



Definition of a problem

A **problem** is the unknown underlying cause of one or more incidents.

Definition of a problem



Problems versus incidents

- With an *incident*, an error occurs.
- A **problem** can be:
 - The root cause of an incident
 - The occurrence of the same incident many times
 - An incident that affects many users

Problems versus incidents

Reasons for distinguishing between incidents and problems

Without this distinction between incidents and problems, and keeping separate incident and problem records, either of the following situations might occur:

- Incidents are closed too early in the overall support cycle. There are no actions that are taken to prevent recurrence. In this case, the same incidents have to be fixed over and over again.
- Incidents are kept open so that root cause analysis can be done. In this case, knowledge of when the service was actually restored is lost.

Reasons for distinguishing between incidents and problems

Definition of a major problem

- The definition of what qualifies as a major problem will vary from company to company.
- Major problems usually share the following characteristics:
 - Service impact
 - Problem duration
 - Cost and efficiency to achieve resolution and closure

Definition of a major problem

Definition of a known error

- A **known error** is a problem for which the root cause is known and a temporary workaround or a permanent alternative has been identified.
- Known errors always deal with a configuration item or asset that is at fault.

Definition of problem management

- **Problem management** is the process of diagnosing the root cause of an error and arranging for a correction.
- It ensures stability in IT services by identifying and removing errors in the IT infrastructure.

Benefits of using problem management

Benefits of taking a formal approach to problem management include:

- Having a standard way to approach every problem saves time.
- The number of incidents is reduced.
- The solutions are permanent. There is a gradual reduction in the number and impact of problems and known errors, because those that are resolved will stay resolved.
- People learn from their mistakes. The process provides the historical data from which to identify trends, and the means of minimizing failures and reducing the impact of failures.
- Hardware issue trending. Suppose that a particular model of hard drive keeps having issues. If you are made aware of this trend, you could stop purchasing any more of them and possibly replace the existing ones.

Problem management versus incident management

- | | |
|--|---|
| <ul style="list-style-type: none">• Incident management goal:• To restore the service to the customer as quickly as possible, often through a workaround rather than by trying to find a permanent solution. | <ul style="list-style-type: none">• Problem management goal:• To quickly and accurately determine and resolve the root cause of an incident.• To prevent <i>further</i> incidents. |
|--|---|

A problem is *not* created to resolve an incident.

Resolution of a problem *does not* mean that related incidents are automatically resolved.

Problem management example

- A requester's computer freezes and she calls the Service Desk. The Service Desk creates a service request and incident.
- The Service Desk tells her to reboot and the incident is fixed.
- A few days later, her computer freezes again and the Service Desk notices that it happened a few days before as well.
- The Service Desk creates a problem ticket, because rebooting the computer only solves the incident temporarily. It does not fix the root cause of whatever is causing the computer to freeze.

Lesson 13 Problem management roles

IBM Training



Lesson 13 Problem management roles

Service requests, Incidents, and Problems

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In this lesson, you learn the various roles within IBM Control Desk that are involved with Problem Management. When you complete this unit, you should be able to explain the responsibilities of each role.

Problem management roles

There are four roles that are used in problem management:

- Problem analyst
- Problem manager
- Problem administrator
- Problem owner

Problem analyst

The problem analyst determines what is required to solve problems and initiates appropriate actions. These actions can include:

- Identifying the need for a change request to resolve the problem
- Creating a workaround
- Performing problem determination
- Executing a workaround, if applicable
- Executing a resolution, if applicable
- Updating the problem reporting system with the root cause and permanent resolution information

Problem analyst Start Center

Problem manager

- The **problem manager** is responsible for the smooth operation of the Service Desk.
- Problem managers watch SLA reports, queue statistics, and other reports related to the operation of the service desk.
- In the lab, the problem manager is pmprbmgrusr.

Problem manager Start Center

The screenshot shows the 'Problem manager Start Center' window. At the top left is a 'Quick Insert' panel with options: 'New Bulletin' (red icon), 'New Service Request' (blue icon), and 'New Solution' (yellow icon). Below it is a 'Favorite Applications' section with links: Bulletin Board, Incidents, Problems, Service Requests, and Solutions. A central dashboard displays 'Average Process Time' with a gauge showing a value of 0. The gauge scale ranges from 0 to 5 hours, with increments of 0.5. The bottom right of the dashboard has a 'Variance' value of -1. To the right of the dashboard are four panels: 'Bulletin Board' (empty), 'Inbox / Assignments' (empty), 'Late Problems' (empty), and 'Open Problems' (empty).

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123

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Problem manager Start Center

Problem administrator

- The **problem administrator** is responsible for system-level administration of the Service Desk.
- Problem administrators assign security groups and roles for service desk analysts and managers.
- In the lab, the service desk manager is pmprbadmusr.

Service requests, Incidents, and Problems

124

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Problem administrator

Problem administrator Start Center

The screenshot shows the 'Problem administrator Start Center' interface. At the top, there are tabs for 'All Users' and 'Problem Administrator'. Below the tabs, there's a 'Quick Insert' section with a message: 'You do not have access to the selected actions.' To the right of this is a 'Bulletin Board' section with a message: 'There are currently no bulletin board messages to view.' Further down is an 'Inbox / Assignments' section with a message: 'No Assignments found for PMPRBADMUSR'. The main area is titled 'Open Problems' and contains a table of 5 entries:

Ticket ID	Description	Internal Priority	Status	Owner	Owner Group	Target Start	Target Finish
TUSC1001	Network slow	1	PENDING	NANCY			
TUSC1005	Network Connectivity	2	PENDING	NANCY			
TUSC1011	Oracle system appears to be down.-website error 404	3	PENDING	SCOTT			
TUSC1023	Oracle system appears to be down.-website error 404	3	PENDING	SCOTT			
TUSC1013	Oracle system appears to be down.-website error 404	4	PENDING	SCOTT			

Below the table is a note: '1 - 5 of 8 | Next Page >>'. On the left side of the main area, there's a 'Late Activities for Problems' section with a table and a gauge chart. The table shows current values for Last Reading, Actual, Target, and Variance. The gauge chart ranges from 0 to 11, with the needle pointing towards 0.

Problem owner responsibilities

- Oversees all activities that are related to the assigned problem
- Responsible for the overall handling of a specific problem
- Brings in appropriate analysts and specialists as needed
- Ensures that the problem is resolved and closed
- In the lab, the problem owner is pmprbownusr.

Problem owner Start Center

The screenshot shows the 'Problem owner Start Center' interface. At the top, there are tabs for 'All Users' and 'Problem Owner'. The main area is divided into several sections:

- Quick Insert:** Buttons for 'New Problem' and 'New Solution'.
- Bulletin Board:** A section stating "There are currently no bulletin board messages to view."
- Favorite Applications:** Links for 'Incidents', 'Problems', and 'Solutions'.
- Open Problems:** A dashboard with a gauge chart titled "Problems that are currently open". The gauge scale ranges from 0 to 20, with major ticks at 0, 2, 4, 6, 8, 10, 12, 14, 16, 18, and 20. The needle points to 0. Below the gauge, there is a table with columns: Status, Last Reading, Actual, Target, and Variance. The status is green, indicating everything is within target.
- Inbox / Assignments:** A section stating "No Assignments found for PMPRBOWNUSR".
- My Late problems:** A section stating "No Data Found."
- My Open Problems:** A section stating "No Data Found."

Lesson 14 Problem management scenario

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Lesson 14 Problem management scenario

Service requests, Incidents, and Problems

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In this lesson, you follow a ticket that has been escalated from either a service request or an incident.

After you complete the lesson, you should be able to perform these tasks:

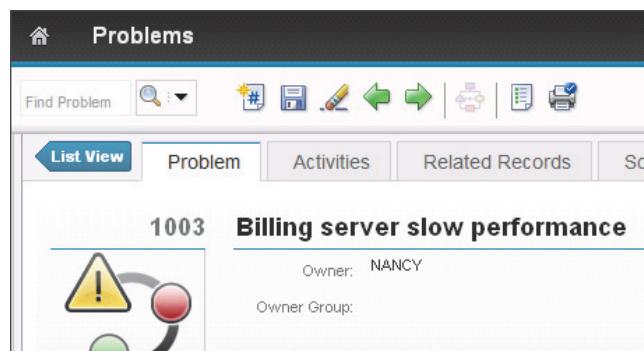
- Open a problem ticket
- Properly document your attempts to resolve it
- Create work and communication logs in the application to track the work performed on the ticket
- Create a multiple-step activity
- Document the steps used to resolve the problem through the creation of a solution
- Record the symptoms, cause, and ultimate solution

Problem analysts receive the problem ticket

Problem tickets work the same way as Service Requests and Incidents.

Problem analysts receive the problem ticket

Open the problem ticket



Open the problem ticket

Gather background information

Problem Details

Summary:

Billing server slow performance



Details:

The backup billing server is performing slowly. The primary server is ok.

Gather background information

Diagnose the problem

- Nancy was working on other higher priority issues recently, and decides to review the ticket details to refresh her memory.
- From the details in the incident ticket, Nancy knows to check the backup billing server. She runs some diagnostic, 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 needs to be upgraded.

Diagnose the problem

Document the steps

Nancy creates an activity that details the steps that are required to fix the problem.

Document the steps

Create the activity

Activities Filter > 1 - 1 of 1

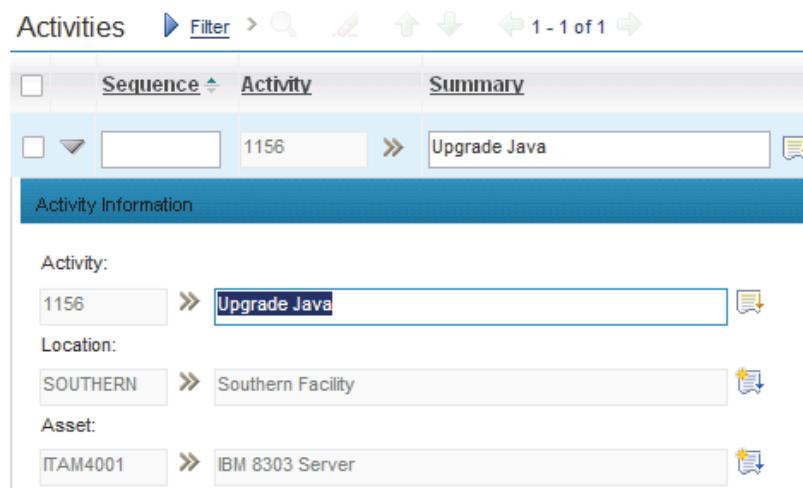
	Sequence	Activity	Summary
<input type="checkbox"/>	1156	Upgrade Java	

Activity Information

Activity: 1156 ➤ Upgrade Java

Location: SOUTHERN ➤ Southern Facility

Asset: ITAM4001 ➤ IBM 8303 Server



Create the activity

Fix the problem

- 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.

Fix the problem

Complete the activity

- Nancy logs back in to the system and reopens the activity.
- She creates a work log entry to detail the upgrade, and closes the activity by changing its status to Completed.

Complete the activity

Enter the solution information for this problem

- Symptom
Backup billing server running slowly
- Cause
Java software was back-level
- Resolution
Updated Java

Enter the solution information for this problem

Student exercises



Student exercises

Summary

- Describe the differences between service requests, incidents, and problems.
- Create a problem ticket from the incident ticket, bringing existing data forward.
- Search external knowledge bases for solutions.
- Use known errors to efficiently resolve incidents and problems.
- Follow the flow of a complex issue from report to resolution.
- Define and describe the roles that are associated with the Service Desk.

Unit 5 The Service Catalog

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5 The Service Catalog

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This unit is about the Service Catalog, offerings, and shopping carts.

Objectives

- Order a service offering
- Check on the progress of a request
- Fulfill a catalog request

Lesson 1 Service Catalog overview

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Lesson 1 Service Catalog overview

In this lesson, you learn what a service catalog is and the important role it plays in an organization.

After you complete this lesson, you can describe the characteristics of a service catalog, an offering, and the shopping cart. You can also explain the relationship between a catalog request and a service request.

Half of the picture

- The Service Desk works well for one-time requests or issue reporting. But that is only half of the picture.
- How do the employees of a company know all the services their IT department provides? There is no central list that tells the requesters what services they are entitled to and how to obtain them.
- Furthermore, unless a list is made, the IT department personnel themselves might not know all the services that they provide and the best way to provide them.
- The Service Catalog provides this other half of the picture.

The Service Catalog

- Using the *Service Catalog*, users can obtain IT services through published service offerings.
- With the Service Catalog, users can *order* services.

The Service Catalog

The Service Catalog details the best ways to provide services, so that the same services are efficiently provided the same way each time.

The importance of having a Service Catalog

- The importance of a Service Catalog is often underestimated.
- Creating a Service Catalog is not the same as simply listing or describing services.
- The catalog is part of a cyclic design process that involves:
 - Continually providing an IT portfolio strategy
 - Linking and defining IT services
 - Systematically monitoring the strategy and services
 - Providing feedback to close the loop
 - Eventually redesigning the services and the catalog, which can mean adding, retiring, or redefining services

The importance of having a Service Catalog

The value in a catalog service is not provided by the catalog alone. Additional value is provided by the evaluation cycle, which determines which services must be included in the catalog and which ones must be retired.

Structure

- Everything starts with the **offering**, which is a service a requester can order. Offerings can initiate a workflow, launch another application, or display information to a user.
- Offerings are grouped into **catalogs**. A catalog is a container for one or more offerings.
- When shopped for, offerings are placed into a **shopping cart**, which is used to hold offerings the user intends to order.
- A **catalog request** is created to internally represent the cart, and a **service request** is created to represent each offering added to the cart.

Service request changes

Service Request Details

Summary:	Offering:
Firewall Change Requests	PMSC_2017A
Details:	Service Group:
	IT
Customer Charge Account:	Service:
	SECSUPP
Customer Cost Center:	Site:
	PMSCRTTP
Classification Path:	Asset:
PMSC_DNS\PMSC_O	
Class Description:	Location:
Operations	
Catalog Request ID:	Configuration Item:
CART1088	Source:
	SERVICECATALOG
Internal Priority:	

Service request changes

Service requests that originate from the Service Catalog include the following additional attributes:

- Catalog Request ID
- Offering
- Offering Description
- Quantity

The **Specifications** tab includes the attributes and values that are specified on the offering screen when the request was submitted.

In addition, four statuses are added:

- **DRAFT**: Request is not yet submitted
- **APPLM**: Approved by line manager
- **APPFM**: Approved by fulfillment manager
- **APPR**: Approval processing complete

Lesson 2 The Service Catalog process

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Lesson 2 The Service Catalog process

The Service Catalog

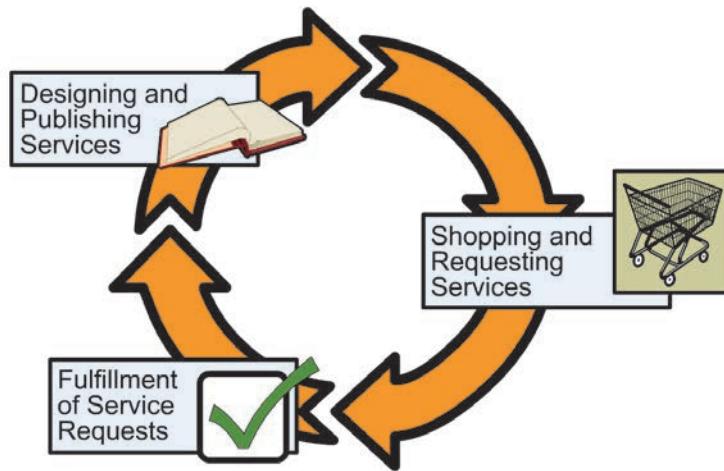
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In this lesson, you add to your knowledge of the service catalog and the iterative process that it undergoes to stay current.

You learn how to perform the following tasks:

- Design and publish services
- Shop and request services
- Approve and fulfill catalog requests

Service Catalog process diagram



The Service Catalog

10

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Service Catalog process diagram

Designing and publishing services

In this step, offerings and catalogs are created and published. A *service delivery manager* determines what services to offer, their delivery plan, and providers. A *service designer* creates and publishes offerings and catalogs through the Offerings and Catalogs applications.

Shopping and requesting services

In this step, offerings are searched for, selected, and submitted.

The *requester* (role name: service requisition user) shops and adds offerings to the shopping cart by using the Offering Catalog application.

- A catalog request is created with a status of New.
- A service request corresponding to the offering is created with a status of Draft. It links the service request to the catalog request

The requester adds another offering to the shopping cart.

The requester is finished and submits the shopping cart.

- A service request corresponding to the offering is created with a status of Draft. It is linked to the existing catalog request.
- Workflow changes each service request's status to New.



Attention: While shopping, the user can click **Order Now**, which creates a shopping cart, adds the offering to it, and submits it all in one step. All of these actions are performed without disturbing the contents of the current cart.

Management approval

Workflow	Line Manager Approval	Fulfillment Manager Approval
Type: <input type="button" value="Default"/>	Preapproved? <input checked="" type="checkbox"/> Default Workflow? <input type="checkbox"/>	Preapproved? <input checked="" type="checkbox"/> Default Workflow? <input type="checkbox"/>
Workflow:	<input type="button"/> >>	Workflow: <input type="button"/> >>

Approval process

The approval process for each service request depends on the configuration options that are specified when using the Organizations and Offerings applications.

The options make it possible to implement the following approval scenarios:

- Both Line Manager and Fulfillment Manager approval are required.
- Automatic approval for both the Line Manager and the Fulfillment Manager.
- Line Manager approval only required.
- Fulfillment Manager approval only required.

The default workflow is started for each service request created. This workflow starts another workflow (PMSCSR3A) that drives the approval process.

Fulfillment of service requests

Finally, in this step, the selected offerings are approved and fulfilled. All actions necessary to fulfill the service are completed here.

Each service request is sent to the line manager (role name: service requisition user manager) for approval or rejection.

Each service request that the line manager approves is sent to the fulfillment manager (also known as the operations analyst) for approval or rejection. For example, when ordering a new computer, a user might get manager approval to submit the entire order, but the fulfillment organization might not be able to deliver that request. The cost center might not be appropriate. The specification might not be according to the contracted service. The number of requests might be exceeded. Other validation might be necessary.

If the service request is approved, its status is set to APPRLM, and it is sent to the fulfillment manager for approval. If the service request is rejected, its status is set to Resolved, and processing for this service request stops. As soon as one of the service requests is either approved or rejected, the status of the catalog request is set to In Progress. If all of the service requests are rejected, then the catalog request status is set to Resolved.

If the service request is approved, its status is set to APPRFM. The workflow then checks to see whether there are any other approval steps. If there are no more, it then sets the status of the service request to APPR. The workflow checks to see whether a ticket template is specified on the offering that is associated with the service request.

If a ticket template exists, it is applied to the service request. If it included a job plan, an activity work order is created with a status of WAPPR.

The user contact analyst checks the completeness of the service request. If more information is needed to process the request, the analyst works with the requester to get it. When satisfied, the analyst sets the status of the ticket to In Progress. Work management approves the activity, changing its status to APPR.

The operations specialist performs the activities and then marks the activities as Complete. This action sets the service request to Complete also.

If this service request was the final unresolved service request, it is automatically marked as Closed. Fulfillment is complete.

If the service request is rejected, its status is set to Resolved, and processing for this service request stops. If all of the service requests are rejected, then the catalog request status is set to Resolved.

Lesson 3 Scenario

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Lesson 3 Scenario

The Service Catalog

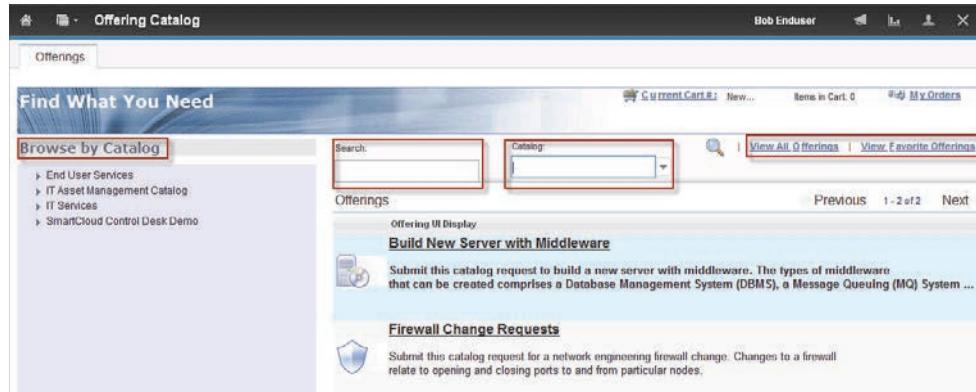
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In this lesson, you learn how to perform the following tasks:

- Locate and select offerings
- Verify and submit catalog requests
- Receive and approve or reject requests as a line manager or fulfillment manager

Additionally, you learn how the service catalog can generate activities, tasks, and work orders and assign them to various teams within your organization.

Locating an offering



Locating an offering

After opening the catalog, customers want to locate the offering that they are interested in. There are three methods for locating an offering:

- By catalog
- By using the Favorite Offerings
- By searching.

When a user selects an offering in the category pane on the left side, all relevant offerings are shown in the Offerings area. This area also contains the results of a search.

Offerings that the customer marked as a favorite are displayed with the View Favorite Offerings option.

Selecting an offering

Build New Server with Middleware

Item: PMSC_2021A
Last Update: 1/11/12 22:42:13

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 or an Application Server (AS). The service is performed using a largely manual install process.

Offering Details

* Requested For: BOB User Provided Attachments

→ 1. Server Configuration → 2. Middleware Configuration → 3. Summary

* Host Name:
* IP Address:
* Organization:

Selecting an offering

When a user selects an offering, the system opens a window that shows the offering details, such as the following examples:

- A detailed description
- The date by which the offering must be completed
- More information relevant to the selected offering

The user responds to the questions pertinent to the offering, and can attach files that can help the agent when fulfilling the request.

Summary page

Build New Server with Middleware

Item: PMSC_2021A
Last Update: 1/11/12 22:42:13

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 or an Application Server (AS). The service is performed using a largely manual install process.

Offering Details

* Requested For: BOB

User Provided Attachments

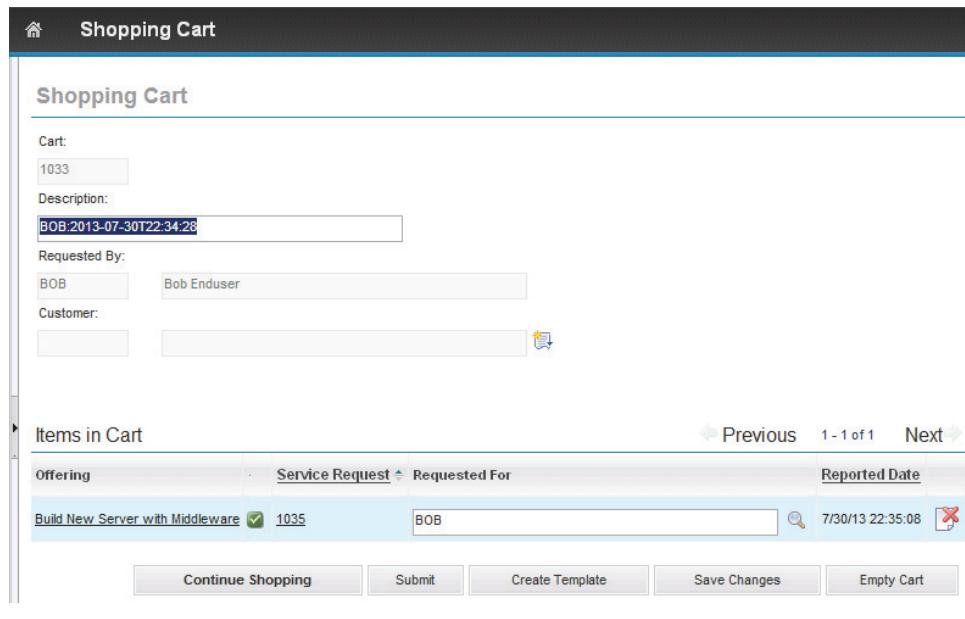
→ 1. Server Configuration → 2. Middleware Configuration → 3. Summary

Request for new Server with hostname = WebServer, Operating System = PMSC_LINUX1 and IP Address = 10.10.10.150.

Summary page

If the offering has more than one page, the final page shows a summary.

Shopping Cart application

The screenshot shows the 'Shopping Cart' application interface. At the top, there's a header bar with a home icon and the title 'Shopping Cart'. Below it, a section titled 'Cart' contains fields for 'Cart' (with value '1033'), 'Description' (with value 'BOB:2013-07-30T22:34:28'), 'Requested By' (with value 'BOB' and 'Bob Enduser'), and 'Customer' (with a dropdown menu). A large section below is titled 'Items in Cart' and displays a table with one row. The table has columns for 'Offering' (listing 'Build New Server with Middleware'), 'Service Request' (with value '1035' and a checked checkbox), 'Requested For' (with value 'BOB'), and 'Reported Date' (with value '7/30/13 22:35:08'). To the right of the table are buttons for 'Previous', '1 - 1 of 1', and 'Next'. At the bottom of the 'Items in Cart' section are buttons for 'Continue Shopping', 'Submit', 'Create Template', 'Save Changes', and 'Empty Cart'. The footer of the page includes links for 'The Service Catalog', '16', and '© Copyright IBM Corporation 2016'.

Shopping Cart application

After the offerings are selected, they are added to the shopping cart. Multiple services can thus be requested in a single action, rather than individually as they are selected.

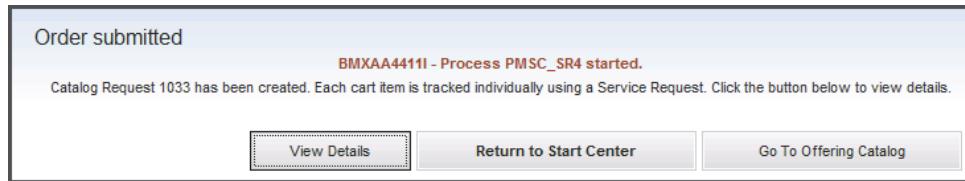
At this point, the customer verifies the following information:

- Personal information
- Shipping destination

The customer also checks that all of the selected offerings are present.

By clicking the icon to the right of each item in the shopping cart, a customer can remove an item from the cart.

Submitting the shopping cart



Submitting the shopping cart

When the cart is submitted, the user can view the details or return to either the Start Center or the Offering Catalog.

Line manager: Approval requested

User Manager All Users

Managers' Applications

Service Requests
Incidents

Bulletin Board Filter > Search <

There are currently no bulletin board messages to view.

KPI Graph

Last Run: 1/21/09 13:26:59

Status	Last Reading	Actual	Target	Variance
Green	0	0	1	-1

Service Requests Waiting for Approval

Inbox / Assignments

Next Assignment Due: 7/30/13 22:37:23

Description	DUEDATE	Route
Manager Approval from BOB for 'Firewall Change Requests'	2/19/12 12:52:43	BOB
Manager Approval from BOB for 'Request PC'	8/1/011 13:31:41	BOB
Manager Approval for New Asset Request	5/11/12 20:28:32	BOB
Manager Approval for New Asset Request	5/15/13 15:14:57	BOB
Manager Approval from BOB for 'Build New Server with Middleware'	7/30/13 22:37:23	BOB

1 - 5 of 5

Line manager: Approval requested

This slide shows the line manager workflow assignment record that was routed to the supervisor.

Line manager: Approved

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](#)

Line manager: Approved

When the user selects the route workflow icon, the Complete Workflow Assignment window opens. The status is changed based on the option selected.

Fulfillment manager: Approval requested

 **Inbox / Assignments**

Next Assignment Due: 7/30/13 23:00:20 [Refresh](#)

Description	Due Date	Priority	Start Date	Route
Fulfillment Manager Approval	7/30/13 23:00:20		7/30/13 23:00:20	

1 - 1 of 1

Fulfillment manager: Approval requested

This slide shows the fulfillment manager workflow assignment record that was routed to the operations analyst for approval.

Fulfillment manager: Approved

Complete Workflow Assignment

Task:
Fulfillment Manager Approval

Action:
 Accept
 Reject

Memo:
[Empty text area]

Earlier Memos [Filter](#) > 0 - 0 of 0

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

[OK](#) [Reassign](#) [Cancel](#)

Fulfillment manager: Approved

When the user selects the route workflow icon, the Complete Workflow Assignment window opens.

Service request



After the approval process is completed, the service request status is set to QUEUED or APPR depending on the workflows involved.

Service request: Activity work order

The screenshot shows the 'Activities' tab of a service request in the IBM Service Catalog. The top navigation bar includes 'List View', 'Service Request', 'Solution Details', 'Activities' (which is selected), 'Related Records', 'Log', 'Service Address', and 'Map'. Below the navigation is a search bar for 'Service Request' containing '1035' and 'Build New Server with Middleware'. To its right are fields for 'Site' (PMSCRTP) and 'Status' (QUEUED). The main area is titled 'Activities' and displays a table with one row. The table columns are: Sequence (10), Activity (Build New Server with Middleware v2), Summary, Location, Asset, Configuration Item, and Status (WAPPR). The 'Activity Processing' dropdown menu is open at the bottom right of the table.

Service request: Activity work order

The **Activities** tab identifies the activity work order that you can optionally create when a ticket template is applied to the service request.

Operations analyst: Work order approval requested

The screenshot shows the IBM Service Catalog interface for an 'Operations Analyst'. The top navigation bar includes 'Change Approval, analysis and implementation', 'All Users', 'Incident Analyst', and 'Operations Specialist'. The main content area is titled 'Welcome, Nancy Incident Analyst'. It features several portlets:

- Quick Insert:** Buttons for 'New Service Request', 'New Work Order', 'New Incident', 'New Problem', and 'New Change'.
- Bulletin Board:** A message board stating 'There are currently no bulletin board messages to view.'
- Inbox / Assignments:** A section stating 'No Assignments found for Nancy Incident Analyst'.
- Main Applications:** A sidebar with links to 'Service Requests', 'Work Order Tracking', 'Activities and Tasks', 'Job Plans', 'Ticket Templates', 'Search Solutions', 'Solutions', 'Incidents', 'Problems', and 'Chances'.
- Group SR Queue:** A table showing one work order:

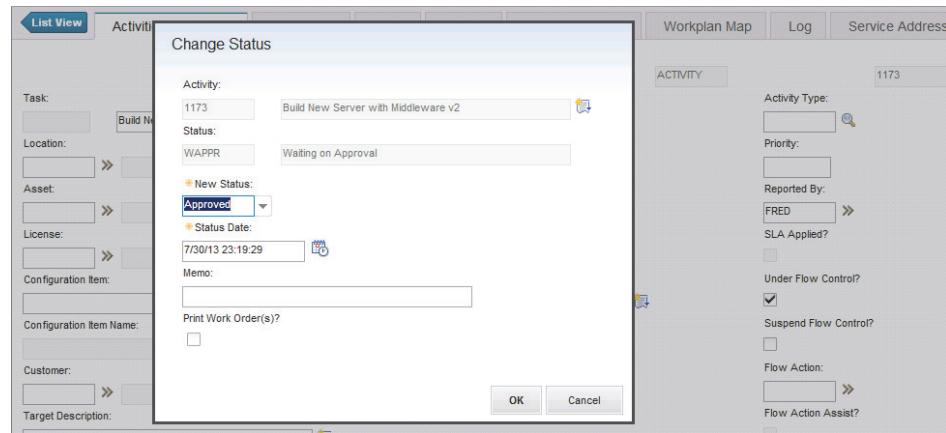
Service Request	Summary	Internal Priority	Status	Owner	Owner Group	Target Start	Target Finish
1005	Build New Server with Middleware	Medium	PENDING	PMSCOG			

1 - 1 of 1
- Group Tasks Queue:** A table showing 'No Data Found.'

Operations analyst: Work order approval requested

When a ticket template is applied, the activity work order is displayed in the Work Orders Waiting for Approval portlet.

Operations analyst: Work order approved



Operations analyst: Work order approved

This slide shows the activity work order that was automatically created when the ticket template was applied to the service request. The work order is approved.

Work order: Tasks

Screenshot of the IBM Service Catalog interface showing the 'Work order: Tasks' view. The interface includes tabs for List View, Activities and Tasks, Resources, Plans (selected), Actuals, Related Records, Workplan Map, Log, Service Address, and Map.

Activity: 1173 - Build New Server with Middleware v2

Job Plan Revision Number: 5

Job Plan: PMSC_0021B

Supervisor: [] >> Status: APPR

Lead: [] >> Site: PMSCRTP

Person Group: [] >>

Tasks for Activity 1173

Sequence	Task	Summary	Estimated Duration	Route	Route Stop	Status	Owner	Owner Group	Action
10	10	Install OS & Standard Applications	1:00			WAPPR	[] >>	PMSCOS	[]
20	20	Configure SAN LUNs	1:00			WAPPR	[] >>	PMSCOS	[]
30	30	Install & Configure Database	1:00			WAPPR	[] >>	PMSCOS	[]
40	40	Install & Configure WAS	1:00			WAPPR	[] >>	PMSCOS	[]
50	50	Create Change Record for Server Deploy	0:15			WAPPR	[] >>	PMSCOS	[]
60	60	Deploy Server	0:15			WAPPR	[] >>	PMSCOS	[]

New Row

Work order: Tasks

The work order tasks are the tasks that are created when the ticket template (containing a job plan) is applied to the service request.

Work order: Close



Work order: Close

When the work order is closed, the service request is automatically closed.

Review questions

1. What value does a Service Catalog add over a Service Desk alone?
2. What are the main components of the Service Catalog?
3. How can you tell if a service request was created through the Service Catalog?

Review answers

1. What value does a Service Catalog add over a Service Desk alone?

The Service Catalog provides a structured and automated way for users to request published services from the Service desk. Because offering definitions include the method of delivery, they are consistently fulfilled. A life-cycle review of the offerings ensures that resources are properly prioritized when deciding which offerings to keep or revise.

2. What are the main components of the Service Catalog?

The Service Catalog consists of:

Catalogs, which contain offerings

Offerings that can be ordered

A **Shopping Cart** that bundles the offerings of an individual order and

Catalog Requests that represent placed orders.

3. How can you tell if a service request was created through the Service Catalog?

The following fields in the Service Request will be completed:

Offering field

Catalog Request ID field

Source is SERVICECATALOG

Student exercises



Student exercises

Summary

- Order a service offering
- Check on the progress of a request
- Fulfill a catalog request

Summary

Unit 6 Self-service

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6 Self-service

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This unit describes how requesters use the self-service tools.

Objectives

- Define *self-service*
- Use self-service tools to search for solutions
- Create a service request using self service
- Use the View Service Requests application to view status and add logs
- List the roles and responsibilities of those involved with self-service
- Distinguish between the self-service user interface and the Service Portal

Lesson 1 Overview

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Lesson 1 Overview

Self-service

3

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In this lesson, you learn the definition of self-service and the benefits self-service can provide to an organization.

Self-service definition

The process of users who use Service Desk tools to solve their own issues is known as **self-service**.

Self-service definition

Using the self-service tools, in many cases, requesters find a solution and never have to create a service request. If a requester cannot find a solution, only then must the service request be created.

Lesson 2 Role

IBM Training

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Lesson 2 Role

In this lesson, you learn about the self-service role and the responsibilities a self-service user has.

Self-service users

When using the Service Desk themselves, requesters are known as ***self-service users***.

Self-service users

In this course, the self-service user is called the requester.

Self-service users' responsibilities

Self-service users (requesters) must perform these tasks:

- Use the Service Desk self-service tools to resolve their own issues
- Contact the Service Desk for these requests and incidents:
 - Information requests
 - Service requests
 - Reporting incidents
- Provide information, as needed, in these cases:
 - Submitted incidents
 - Problems that are related to incidents opened by the requester

Lesson 3 Self-service tools

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Lesson 3 Self-service tools

Self-service

8

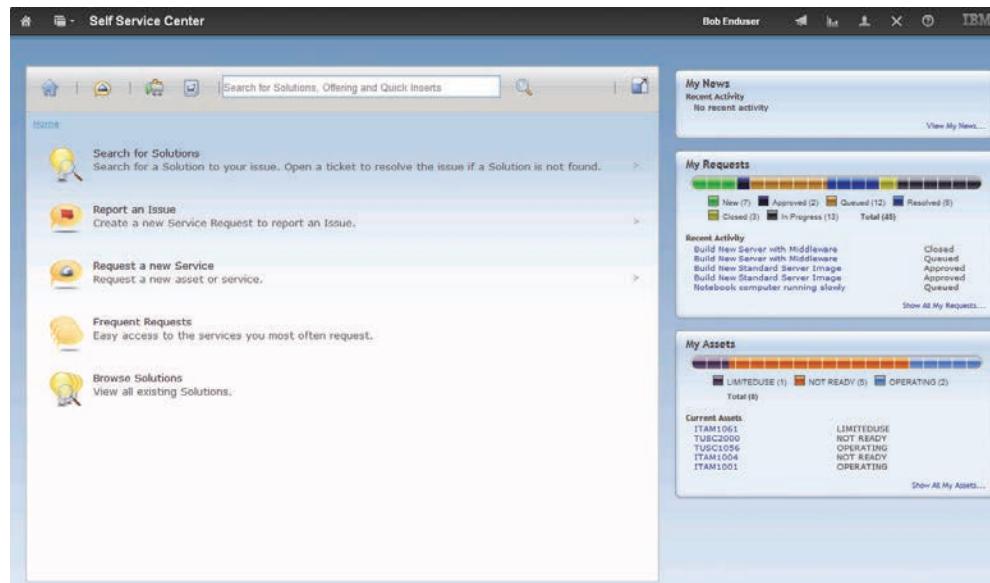
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In this lesson, you learn about the Self Service Center and how to use it.

Additionally, you learn how to perform these tasks:

- Search for solutions
- Report an issue
- Request a service
- Define your personal list of frequent requests
- Navigate and use the service request application
- Use the tooling in Control Desk to capture screens to include with certain requests

Self Service Center



Self Service Center

The default self-service user Start Center contains three portlets:

- **My News:** Displays bulletin board messages.
- **My Requests:** Shows recent requests and the status of the user's service requests.
- **My Assets:** Shows assets that the user is responsible for and their status.

Self Service Center menu

These are the menu choices in the **Self Service Center**:

- Search for solutions
- Report an Issue
- Request a new Service
- Frequent Requests
- Browse Solutions

The Self Service Center is an application that is designed with users in mind. The interface is clean and simple, and it provides quick access to the features most users require.

Search for Solutions

The screenshot shows the IBM Service Portal interface. At the top, there's a navigation bar with links like 'Search for Solutions', 'Report an Issue', 'Request a new Service Request', and 'Frequent Request'. A central search window titled 'Search for Solutions' has a text input field containing 'Enter key words about the issue' and two buttons: 'Search' and 'Close'. Below this, the main content area displays a 'My Requests' dashboard with various status filters and counts. Underneath the dashboard, there's a 'My Assets' section. The bottom half of the screen shows a 'Search Results' page for the query 'error'. It lists three items: 'Oracle Financials Access - 404 Error' (with a 5-star rating), 'Billing System Access issue - Error 34' (with a 5-star rating), and 'Smart Meter display flashing with error code L1890' (with a 4-star rating). Each result includes a brief description and a link to view more details.

Self-service

11

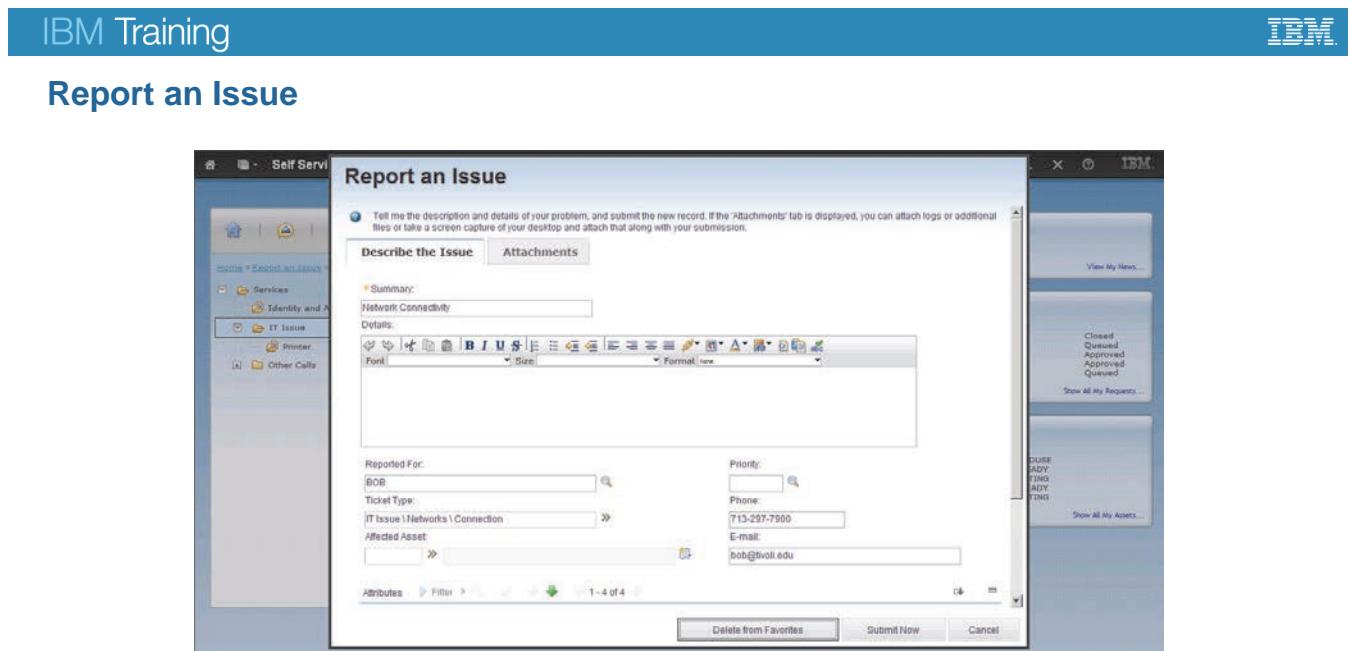
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Search for Solutions

The Search for Solutions tool presents the user with a key word search window. Search results are shown for any matches in the Solutions application, including frequently asked questions. Clicking a result displays the full solution, asks the user if the solution resolved the issue, and gives the option to create a service request.

Because requesters can search for solutions on their own, the Search Solutions tool follows the ITIL framework of best practices. Service Desk personnel can focus on other issues, optimizing their performance, and improving responses associated with service level commitments.

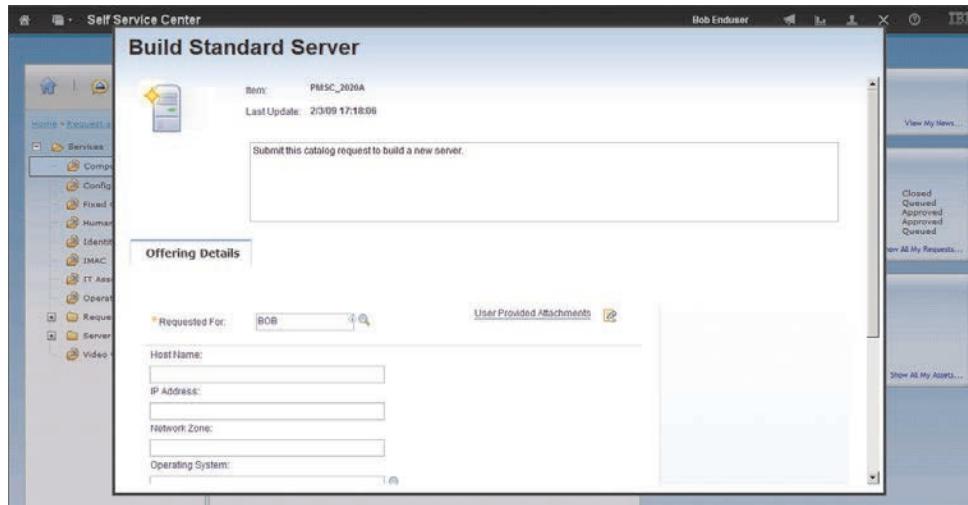
The self-service Search for Solutions tool is a limited version of the agent's Search Solutions application.



Report an Issue

Requesters use the Report an Issue tool to quickly create a service request by using a categorized list of options. These options are taken from ticket templates that were marked for self-service access.

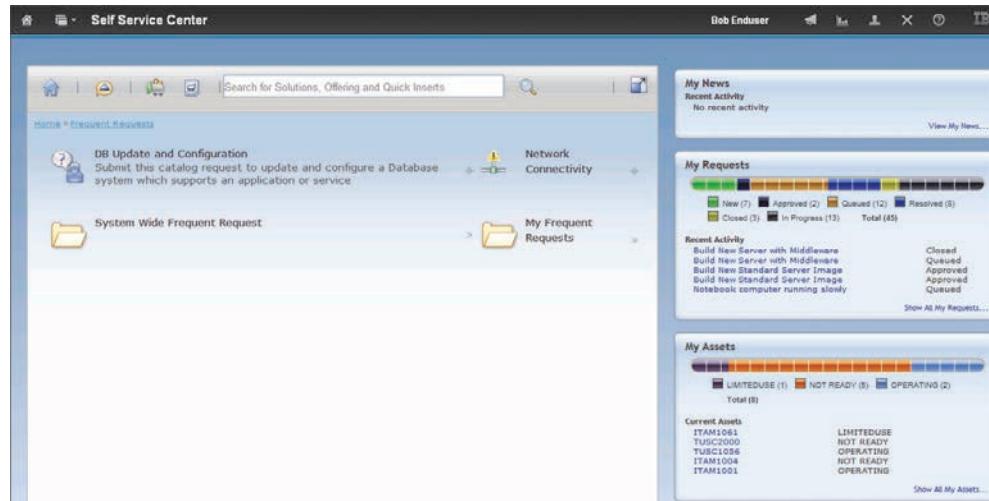
Request a new Service



Request a new Service

Requesters use the Request a new Service tool to quickly create a service request by using a categorized list of options. These options are taken from the Service Catalog.

Frequent Requests



Frequent Requests

The Frequent Requests tool provides quick access to frequently requested service requests. If a self-service user marks a service request as a favorite, the request shows up at the top level of this tool.

Create Request

The screenshot shows the 'Report an Issue' form within the IBM Self-Service application. The left sidebar contains links like 'Home', 'Search for', 'Report an issue', 'Request a quote', 'Frequent Problems', and 'Browse Solutions'. The main window has tabs 'Describe the Issue' (selected) and 'Attachments'. The 'Describe the Issue' tab includes fields for 'Summary' (with a rich text editor), 'Details' (with a toolbar), 'Reported For' (set to 'BOB'), 'Priority' (dropdown), 'Ticket Type' (dropdown), 'Phone' (text input), 'Affected Asset' (dropdown), 'E-mail' (text input), and a 'Submit Now' button.

Create Request

A self-service user can quickly create a service request by clicking **Create Request**. With this option, a self-service user can create a service request without templates or preconfigured catalog offerings.

Self-service user Start Center

The screenshot shows the 'Welcome, Bob Enduser' screen of the IBM Self-service user Start Center. On the left, a sidebar titled 'Go To Applications' lists various service management categories. The main area is divided into several panels: 'Quick Insert' (with options like IT Asset Disposal Request, IT Asset Move Request, and New IT Asset Request), 'Services' (listing Self Service Center, Offering Catalog, Shopping Cart, Create Service Request, Create Requisition, Self Service Global Search, Search Solutions, and Survey Request), 'My Requests' (with links to View Service Requests, View Catalog Requests, View Requisition, View Templates, and View Drafts), and 'Bulletin Board' (which is currently empty). A 'Frequently Asked Questions' panel displays a list of four questions with their average ranking.

Description	The Average Ranking of the Solution
Corporate network account password reset	3
How to release a software license	4
How to order hardware or software	
How to request a corporate application account	

Self-service user Start Center

Self-service users are not limited to just using the Self Service Center. They also have access to a Start Center just like every other IBM Control Desk user.

View Service Requests application

Use this form to search for service requests. For additional details about a field description, place the cursor in the field and press Alt + F1. The icons located next to a field may be used to assist in choosing/selecting an appropriate value for a test. For alphanumeric fields, use < before the test to look for exact matches. Otherwise, the comparison will be case insensitive and match partial text entries.

Service Request Id	Summary	Classification Description	Status	Asset	Location	Configuration Item Name	Reported By	Reported Date	Affected User
SR1286	Air Conditioner broken on 1st floor	Request for Service \ Facility	New				BOB	10/10/11 17:18:10	BOB
SR1844	Unable to access Oracle Financials	Oracle Financials Issue	Resolved				BOB	3/15/11 16:15:49	BOB

Self-service

17

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View Service Requests application

With the View Service Requests application, requesters can search their own submitted service requests. By default, all service requests are displayed. Requesters can use Search fields to narrow the list to find a particular service request.

At any time, requesters can look up their service requests to view status information or other details, or to print a service request. They can also add or view attachments, such as documents or web pages.

In addition, they can view and update the Service Request Log. This log contains communications to and from the Service Desk agent who is handling this request.

Screen captures

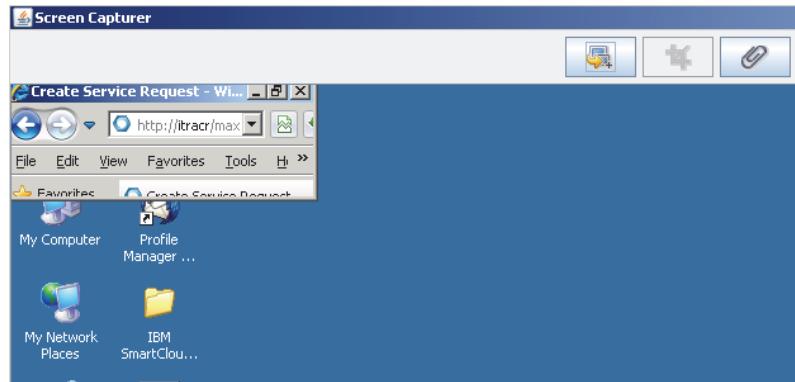
- In the self-service user **Create Service Request** application, you can take screen captures when creating a new ticket.
- This feature can add clarity to the problem and speed up the resolution.



Screen capturer

From left to right, the screen capturer icons are as follows:

- Retake screen capture
- Crop image
- Save image as attachment



Self-service

19

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Screen capturer



Attention: You might have to manually restore the IBM Control Desk window to the position it was before you started the screen capture.

The Screen Capturer is a Java application. Users to attach a screen capture to a ticket.

Lesson 4 Scenarios

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Lesson 4 Scenarios

Self-service

20

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In this lesson, you use the Self Service Center to perform these tasks:

- Search for solutions
- Create a service request using the Self Service Center
- Create a service request by using email

Three scenarios

1. Finding solutions by using self-service
2. Creating a service request by using self-service
3. Creating a service request through email

Scenario 1: Finding solutions by using self-service

- An employee, Bob, is having problems logging in to Oracle Financials. When he tries to log in he gets error 404.
- Before he calls the Service Desk, he attempts to find the answer himself using the self-service tools.

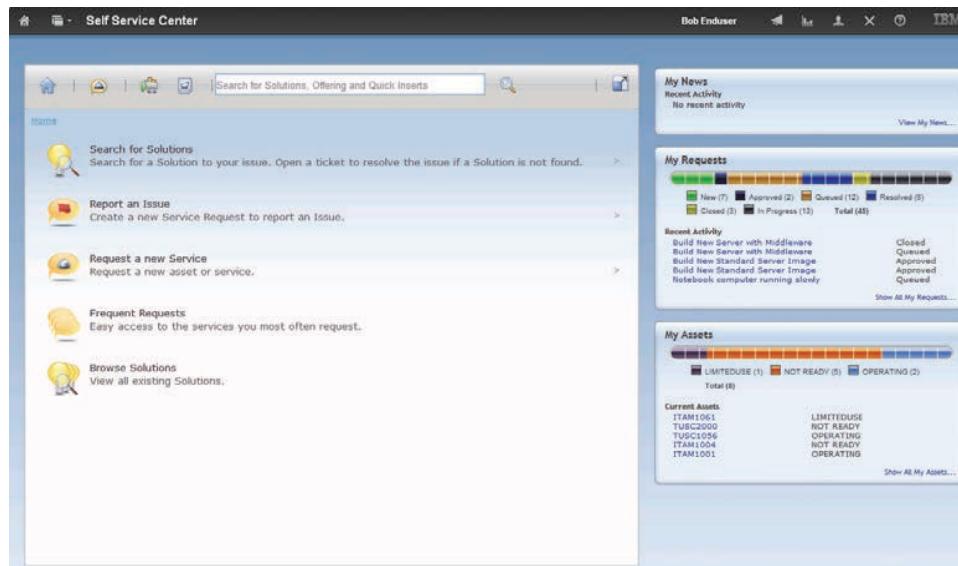
Signing in to the system



Signing in to the system

Bob signs in to the system.

Searching



Searching

this type of information typically is in the frequently asked questions, so Bob searches through them by typing Oracle into the Self Service Center's Search tool.

Searching solutions

The screenshot shows a search results page with a toolbar at the top containing icons for Home, Search, and Help. A search bar contains the text 'oracle'. Below the toolbar, the breadcrumb navigation shows 'Home > Search Results'. Two search results are displayed:

- Oracle Financials Access - 404 Error**
Unable to access Oracle Financials using Internet Explorer with 404 errors.
- How to request a corporate application account**
Require access to a corporate application e.g. CCMDB, CRM, Oracle Financials, TAMIT, TSRM.

Searching solutions

Bob gets two hits on the search. He opens the first solution to view the details.

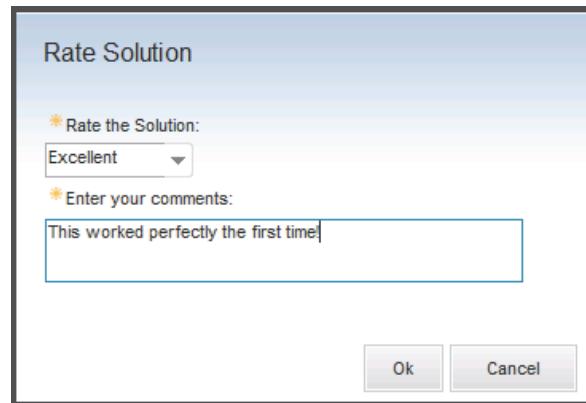
Viewing solution details

The screenshot shows a web-based application window titled 'View Solution'. At the top left is a 5-star rating icon. To its right is a 'Rate this solution' button. Below the rating is a 'Solution' section containing the ID 'SPOC1295' and the title 'Oracle Financials Access - 404 Error'. On the far right of this section is a small edit icon. Below this are three tabs: 'Solution Details' (which is selected), 'User Feedback', and 'Attachments'. A vertical scroll bar is visible on the right side of the main content area. Under the 'Solution Details' tab, there are two sections: 'Publish Date:' with the value '8/8/11 12:37:21' and 'Number of times applied:' with the value '0'. Below these is a 'Symptom:' section containing the text 'Unable to access Oracle Financials using Internet Explorer with 404 errors.'

Viewing solution details

Bob checks the host file and discovers that it is in fact outdated. He updates the file and now everything works.

Rating the solution



Rating the solution

To help other requesters that look for the same answer, Bob ranks the solution, adds a comment, and saves the changes.

Returning to the Start Center

Did this solution help you resolve your issue?

Yes

No - Create a Service Request

No - Return to Solution Search

Returning to the Start Center

Bob returns to the Start Center and goes back to work.

Scenario 2: Creating a service request using self-service

- In this scenario, 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 decides to search for the answer himself using the Self Service Center.

Scenario 2: Creating a service request using self-service

Bob logs in to the system and searches for a solution.

Create a service request

The screenshot shows a search results page for 'phone corporate network' in the IBM Service Catalog. 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.
- 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**

Self-service

30

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Create a service request

Bob finds two links that might apply to this issue. His issue is more related to the network than the phone, So he clicks the link for creating a service request that is related to network connectivity

Filling out the report

Report an Issue

* Summary:
Network Connectivity

Details:

Font: sans-serif Size: Format: None

My new smartphone will not access the corporate network. I cannot connect to the access point.

Reported For: BOB Priority:

Ticket Type: IT Issue \ Networks \ Connection Phone:

Affected Asset: 713-297-7900

E-mail: bob@tivoli.edu

Attributes Filter 1 - 4 of 4

Description	Value
Was the access denied?	YES
Error Message if any?	Contact your administrator
What type of network access?	INTRANET

Delete from Favorites Submit Now Cancel

Self-service

31

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Filling out the report

Notice that Bob's contact information is already entered, as is the classification and a generic summary.

Bob enters a more detailed description of the service request:

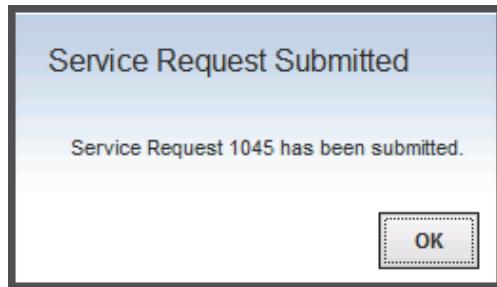
Details: My new smartphone will not access the corporate network. I cannot connect to the access point.

Because this phone is a personally owned device, Bob does not enter an affected asset. Corporate rules might require that he enter it into the tracking system before it is allowed access to the corporate network, however.

Bob must give the request a priority. After thinking about the issue, he assigns a priority of High.

Bob fills out the attribute fields and submits the service request.

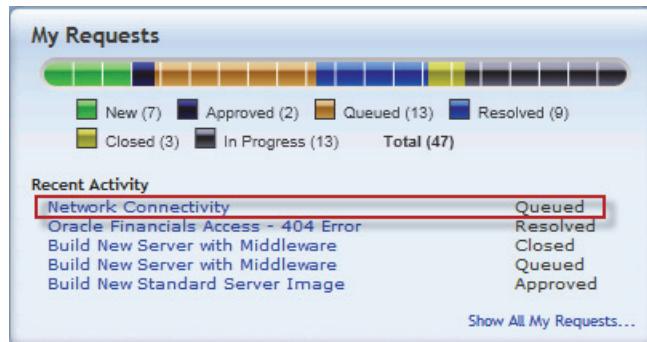
Submitting the service request



Submitting the service request

Bob gets confirmation that his service request was entered. He makes a note of the number for later reference.

Checking status



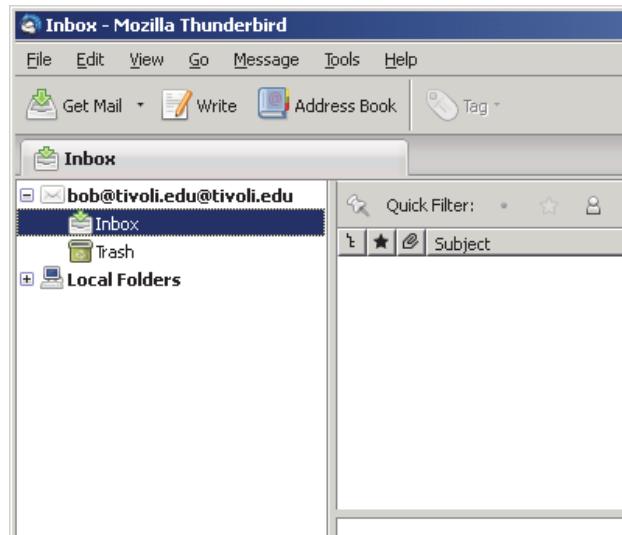
Checking status

Bob goes back to the Self Service Center, and sees that the new service request is visible under the My Requests portlet.

Scenario 3: Creating a service request through email

- In this scenario, Bob cannot find his employee handbook and wants to get another copy.
- Bob submits a service request through an email message.

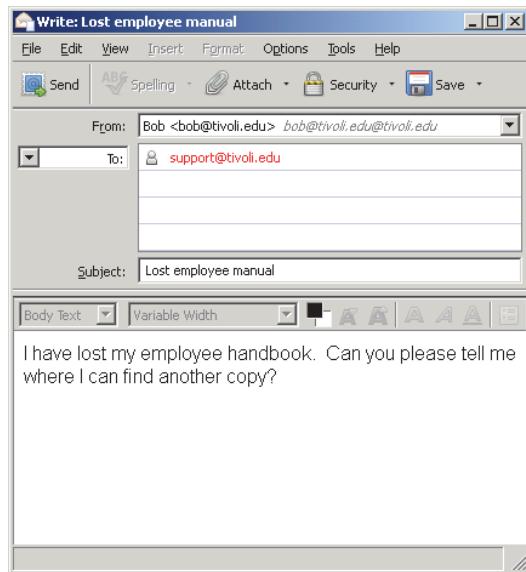
Starting the mail reader



Starting the mail reader

Bob starts the mail reader.

Creating and sending an email message



Creating and sending an email message

Bob creates an email message that describes his issue and sends the message to the company's support email address.

The service request is created

View Service Request

General Log Solutions Attachments

This task displays the details of the service request

Request Details

Summary:	Lost employee manual
Service Request:	1010
Creation Date:	6/5/12 18:04:04
Reported By:	BOB
Target Start:	
Changed Date:	6/5/12 18:04:04
Status:	New
Affected User:	BOB
Target Finish:	
Changed By:	BOB

Attributes

Attribute	Value	Unit of Measure
No attributes found		

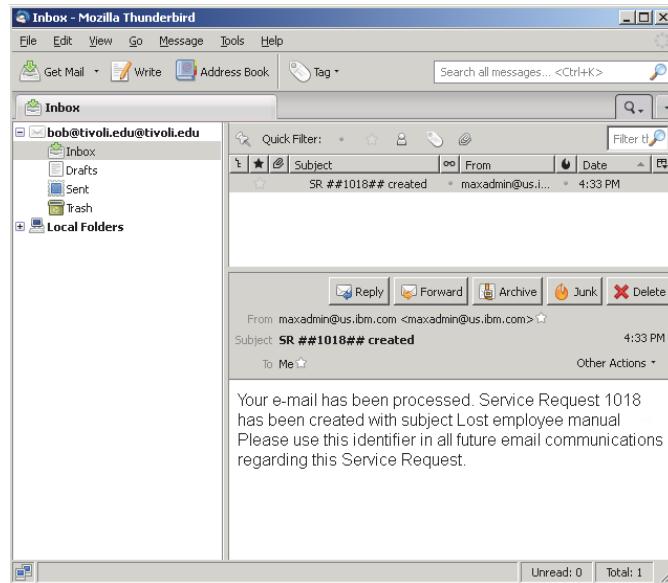
Previous 0 - 0 of 0 Next

OK

The service request is created

The email listener picks up the message and creates a service request after parsing the information.

A reply is received



Self-service

38

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A reply is received

A message is sent to Bob giving the status of the request.

Lesson 5 Navigating the Service Portal

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Lesson 5 Navigating the Service Portal

Self-service

39

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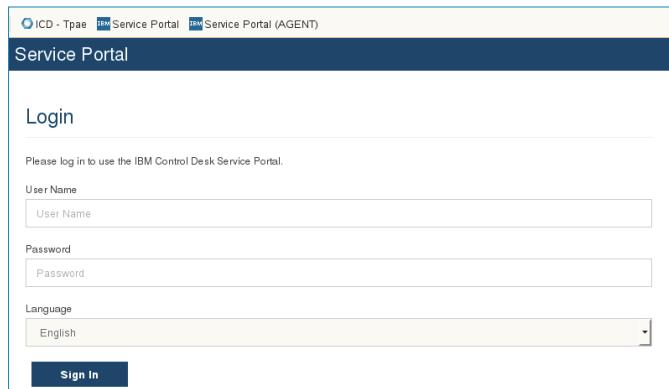
In this lesson, you learn the differences between the Self Service application and the Service Portal application. You learn the differences between the user's self service portal and the self service portal used by service desk agents and managers.

The Self Service Portal

- New approach to self service initially released in late version 7.5
- Cleaner interface
- Limited capabilities at present, but new features being added all the time
- Contains the ability to
 - Open new tickets
 - Review, update and close existing tickets
 - Perform searches for solutions
 - Add attachments to tickets
 - Chat with help desk personnel (if the capability is implemented)
- Initially available only on Linux installations
 - Windows version being developed

Logging in to the Service Portal

- Self Service Center (users)
[https://<host>:<port>/portal/default/**self-service**#](https://<host>:<port>/portal/default/self-service/#)
- Ticketing dashboard (service desk agents)
[https://<host>:<port>/portal/default/**agent**#](https://<host>:<port>/portal/default/agent/#)



The screenshot shows the login interface for the IBM Service Portal. At the top, there's a navigation bar with icons for ICD - Tpae, Service Portal, and Service Portal (AGENT). Below this is a dark blue header bar with the text "Service Portal". Underneath is a light blue "Login" section. It contains three input fields: "User Name", "Password", and "Language" (with "English" selected). A "Sign In" button is at the bottom of the form.

Self-service

41

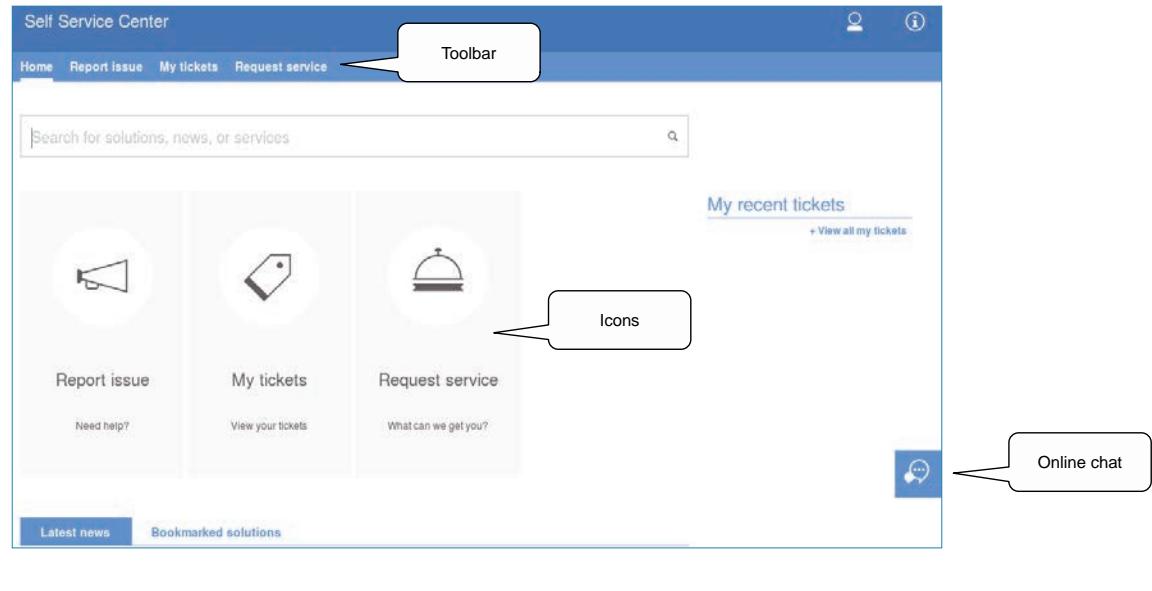
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Logging in to the Service Portal

There are two different URLs for the Service Portal. One is for users and the other is for Service Desk agents and staff. They appear identical, so it is important to ensure that the URL contains self-service for users and agent for Service Desk personnel.

It is through IBM Control Desk roles that the system determines what start center the user logging in to Control Desk receives. The Service Portal replaces the standard start center when the roles are properly configured. There are two different role settings that cause the user's login to direct them to the Self-service interface described earlier in this lesson and the Service Portal.

User's Self Service Center



User's Self Service Center

This screen shows an approximation of what the user sees when he or she logs in to the system, if his or her roles are set to allow access to the Service Portal.

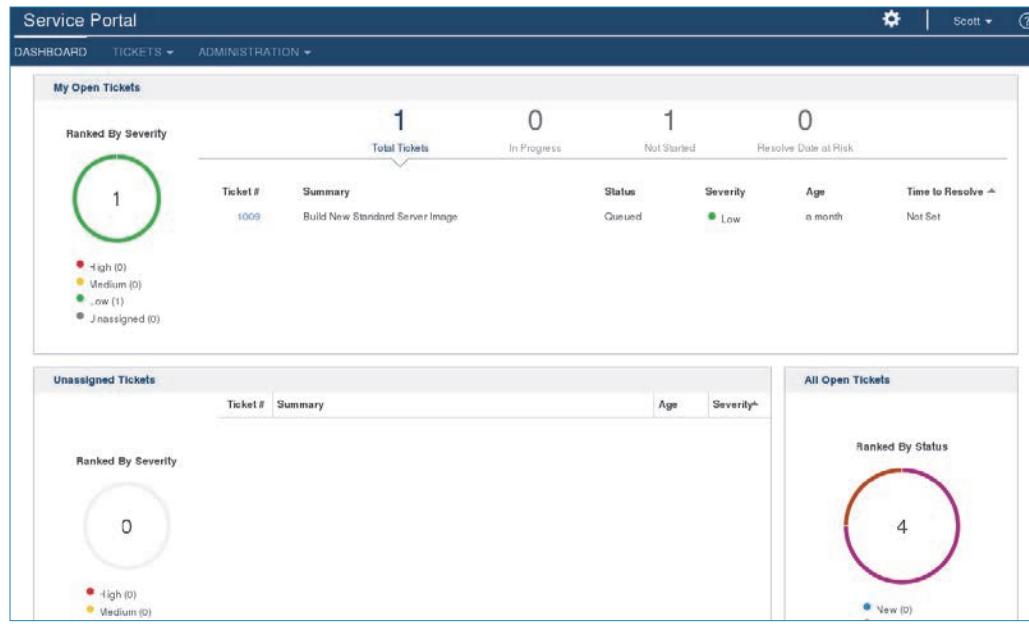
The screen provides the user with a streamlined interface that allows them to report an issue, view their existing tickets (to check status, for example) or open a service request.

As described earlier, a Service Request is a request for service. It could be IT related or unrelated to IT. When the user reports an issue, an Incident ticket is generated.

If the IT department is posting status for outages, the **Latest News** tab at the bottom of the screen is presented. From the second tab, **Bookmarked solutions**, users can bookmark solutions to issues that they are having and refer to the solutions again in the future.

The toolbar at the top duplicates the large icons in the center of the screen. And, if the chat function is enabled, the icon at the lower right initiates a chat request with the Service Desk.

Agent's ticketing dashboard



Self-service

43

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Agent's ticketing dashboard

When a Service Desk agent logs in to the system, they see this interface. If the SLA feature is employed at the customer site, the interface contains pods that display information about existing tickets, including the severity, status, age, and time remaining to resolve.

It also shows any tickets that are in the queue but have not been assigned to a user. Agents can *pick up* tickets here and add them to their own queue.

The Service portal is available only on systems that run the Linux operating system.

Review questions

1. What actions can self-service users perform from the Self Service Center?
2. What are the responsibilities of self-service users?
3. Where do the **Request a new Service** options come from?

Review answers

1. What actions can self-service users perform from the Self Service Center?

Search for solutions, report issues, request new services, check the status of the user's assets and tickets, and read bulletins.

2. What are the responsibilities of self-service users?

- Self-service users (requesters) must perform these tasks:
- Use the Service Desk self-service tools to resolve their own issues
- Contact the Service Desk for information requests, service requests, and reporting incidents

3. Where do the **Request a new Service** options come from?

Requesters use the Request a new Service tool to quickly create a service request by using a categorized list of options. These options are taken from the Service Catalog.

Student exercises



Summary

- Define self-service
- Use self-service tools to search for solutions
- Create a service request using self service
- Use the View Service Requests application to view status and add logs
- List the roles and responsibilities of those involved with self-service
- Distinguish between the self-service user interface and the Service Portal

Unit 7 Workflows

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7 Workflows

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This unit defines workflows, shows how they are used in IBM Control Desk, and details scenarios in which they are used.

Objectives

- Define the term workflow and explain how workflows help the Service Desk perform its mission
- Successfully resolve a service request using a workflow
- Trace a simple workflow

Lesson 1 Overview

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Lesson 1 Overview

Workflows

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In this lesson, you learn how to perform the following tasks:

- Describe what a workflow is and explain the capabilities it has
- Locate workflows within Control Desk and describe when they should be used
- Explain the relationship between workflows and the Tivoli Unified Process

Definition of workflow

A **workflow** can be thought of as a map that guides a ticket, or an agent's interaction with that ticket, through a set of steps. It ensures that user issues are handled in a consistent and repeatable way.



Definition of workflow

Workflows provide a means of electronically reproducing business processes so that they can be applied to tickets. They also make business practices repeatable. Workflows get information to the right people at the right time. For example, workflow processes can send a solution for review, approval, and activation. Workflows might also be used to automatically send a solution in response to a service request.

Workflow processes can be complex, but they consist of simple components.

Workflow benefits

Using workflows has the following benefits:

- Consistently applies business practices to tickets
- Manages the movement of a ticket through a process from start to finish
- Routes a ticket and instructions to the appropriate individual or individuals so that they can act on it
- Ensures that individuals act on tickets that are assigned to them in a timely manner
- Guides users through their interaction with a ticket
- Ensures that an audit trail exists for each ticket and process

Workflow capabilities

Workflows provide the following capabilities:

- Workflow processes and their supporting records can be used for all organizations and sites, and can be site-specific.
- A ticket can be routed into a workflow process automatically or manually.
- When a process task requires a user decision, the ticket can automatically be assigned to a role that resolves to a person group, person, or alternate at run time.
- Assignees can receive notifications of assignments in their Workflow Inbox or by email, eliminating the need for users to search for their assignments.
- Delegates can be specified when workers are unavailable.
- Agents can link from their Workflow Inbox directly to the assigned record.

When a process requires user input, a window can be displayed with a menu of context-appropriate options that are specified in the process. When only a single choice of actions exists, a ticket can be moved through a step in a process automatically. You can define a time limit for completing a task after which the ticket can automatically be escalated. You can define the point at which email notifications are generated. A workflow process for one type of Service Desk ticket, such as a service request, can start a process for another type of ticket, such as an incident.

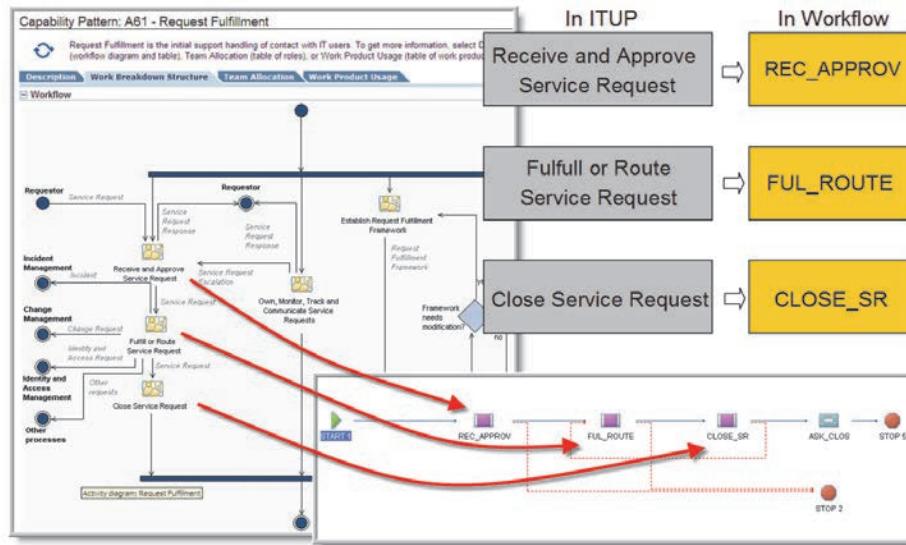
Workflows included with IBM Control Desk

Process	Description	Object	Process Revision	Enabled?	Active?	
ITAMDISPL	Asset Disposal Request	SR	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
ITDISPOSE	IT Asset Disposal Request	SR	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
ITMOVESR	IT Move Service Request	SR	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
ITNEWASSET	New IT Asset Request	SR	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PMSC_0007F	Add Database to Server - Fulfillment Manager Approval	SR	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PMSC_0007L	Add Database to Server - Line Manager Approval	SR	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PMSC_0011L	Minor Facility Request - Line Manager Approval	SR	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PMSC_0012F	Office Move Request - Fulfillment Manager Approval	SR	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PMSC_FFWC	SR Fulfillment Option with auto-commit	SR	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PMSC_FMD1	Fulfillment Manager Approval - Default	SR	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
PMSC_LMD1	Line Manager Approval - Default	SR	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Workflows included with IBM Control Desk

These workflows are only a sample of the service request-centered workflows. There are also workflows for incidents, problems, work orders, activities, communications, solutions, and users.

IBM Tivoli Unified Process links directly to workflow



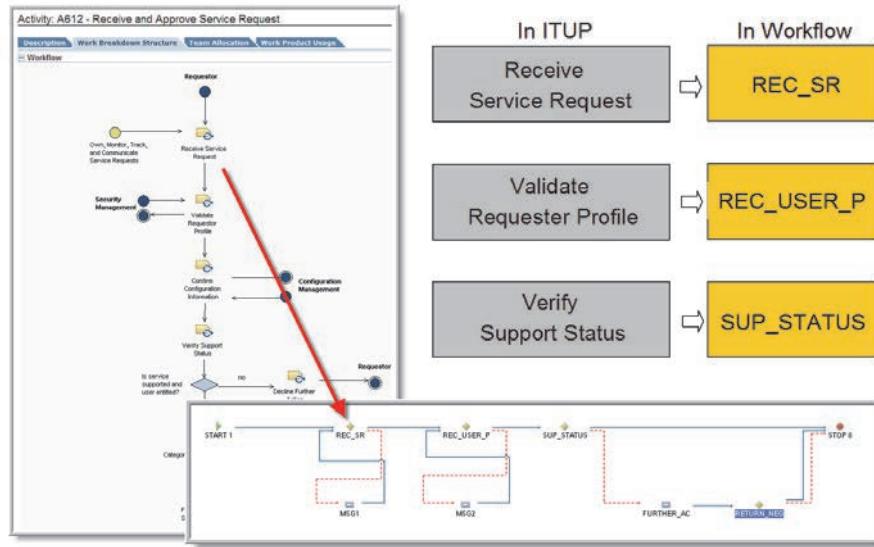
Workflows

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IBM Tivoli Unified Process links directly to workflow

The processes from IBM Tivoli Unified Process are directly mapped into workflows.

Subflows



Workflows

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Subflows

This mapping continues all the way down to the subflow level.

Escalations

Like service level agreements, workflows use escalations to perform functions automatically and send notifications.

Lesson 2 Workflow process maps

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Lesson 2 Workflow process maps

Workflows

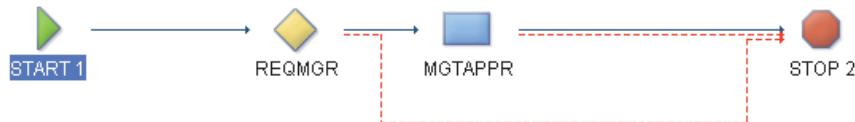
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In this lesson, you learn how to perform the following tasks:

- Read and understand a workflow process map
- Navigate to the workflow designer
- Describe the connection types within the workflow designer

The workflow process map

The Minor Facility Request – Line Manager Approval workflow is shown in the following map.



The workflow process map

Workflows are displayed graphically by showing a process map.

A workflow process map consists of *decision points* (called nodes) and connecting lines (also known as *action lines*) between the decision points. The nodes indicate points in a process where a decision is made. The connection lines show the path that the record takes after a decision point. A box around the node highlights the record's current location in the process.

With a workflow map, agents can see where their assignment falls in the context of the entire process.

Node types

Tool Image	Description
	The Start node indicates the beginning of a workflow process. There can be only one starting point to any process.
	Stop nodes mark the point where a workflow process ends and a record leaves workflow control.
	Task nodes direct the path of the record. Task nodes are used when business rules call for an affirmative or negative user response to an Inbox assignment.
	Condition nodes are defined to automatically direct records according to information contained within the record.
	Manual Input nodes direct the path of a record. With Manual Input nodes, the user can select the next step from a menu.
	A Subprocess node represents a complete workflow process nested within another workflow process.
	An Interaction node helps to lead a user down particular problem resolution paths by offering well-defined choices. These choices guide the user through a scripted path and manage the relationship with the record in any particular session. A Manual Input node typically precedes the Interaction node.
	Wait nodes are used to create a certain reaction to an action. When a workflow encounters a Wait node in an active process, the process pauses at that node indefinitely until any of the specified events occurs.

Node types

The *Start node* indicates the beginning of a workflow process. There can be only one starting point to any process.

Stop nodes mark the point where a workflow process ends and a record leaves workflow control.

Task nodes direct the path of the record. Task nodes are used when business rules call for an affirmative or negative user response to an Inbox assignment.

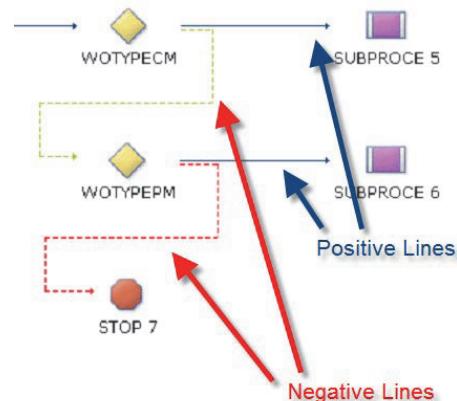
Condition nodes are defined to automatically direct records according to information contained within the record.

Manual Input nodes direct the path of a record. With Manual Input nodes, the user can select the next step from a menu.

A *Subprocess node* represents a complete workflow process nested within another workflow process.

Connection line types

- **Positive:** This line is followed when the expressed condition has been met.
- **Negative:** This line is followed when the expressed condition has not been met.



Lesson 3 Task assignments

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Lesson 3 Task assignments

Workflows

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In this lesson, you learn how to perform the following tasks:

- Define and explain a task or workflow assignment
- Describe the relationship between people, roles, and their relationship to workflow assignments
- View workflow assignments, and workflow history

Definition of task assignment

- A **task assignment** is a record that has been routed to the agent for action, based on the information contained in a workflow process.
- Task assignments are also known as *workflow assignments*.

Workflow and roles

Task assignments are made to *roles*, which resolve to either a person, a person group, or an email address.

Workflow and roles

Sometimes an individual is unavailable for an extended time, such as vacation, and cannot receive assignments. In that case, Workflow can route the individual's assignments to a designated alternate.

Workflow processes consider the following parts of a person record:

- **Supervisor:** Person who oversees or manages the individual. This information is used for escalations.
- **Primary email:** Email address to which notifications are sent.
- **Primary Calendar:** The work calendar that the individual follows. This information is used when determining assignments and escalations.
- **Primary Shift:** The shift that the individual works. This information is used when determining assignments and escalations.

A workflow process can also route a record to a person group.

Workflow Inbox/Assignments portlet

The screenshot shows a table titled "Inbox / Assignments". At the top left is an envelope icon. To its right is the title "Inbox / Assignments". Below the title is a message: "Next Assignment Due: 5/15/13 15:14:57". On the far right is a "Refresh" link. The table has three columns: "Description", "DUE DATE", and "Route". There are four rows of data:

Description	DUE DATE	Route
Manager Approval from BOB for 'Firewall Change Requests'	2/19/12 12:52:43	
Manager Approval from BOB for 'Request PC'	8/10/11 13:31:41	
Manager Approval for New Asset Request	5/11/12 20:28:32	

Below the table is a footer: "1 - 4 of 4".

Workflow Inbox/Assignments portlet

Using the Workflow Inbox/Assignments portlet on the Start Center, agents can view their current assignments quickly and efficiently in a modifiable list format.

Agents use the Inbox to review, route, and complete their task assignments. Records that are displayed in the Workflow Inbox are assigned to the agent. These workflow assignments must be completed before the record can move to the next step in the process.

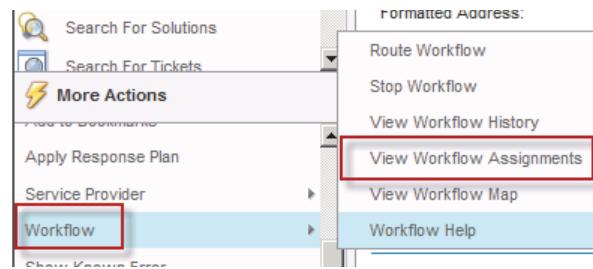
The Description column in the Workflow Inbox displays instructions from the workflow process that describes what action the agent must perform to complete a task assignment. In the slide, the description is Manager Approval from BOB for *Firewall Change Requests*.

To view the record before acting, click the description for the assignment. The associated application opens the record. You can view and modify the record and perform any required actions that the workflow process does not control.

The Inbox also includes the following items:

- **Due Date:** The calculated time value that is needed to finish the workflow assignment.
- **Route:** Click the Route icon to route the workflow process to the next assignment level.

Viewing workflow assignments



A screenshot of the 'View Workflow Assignments' window. The window title is 'View Workflow Assignments'. It contains a table with one row, showing the following data:

Assigned Person Code	Name	Description	Process
FRED	Fred User Manager	Manager Approval from BOB for 'Firewall Change Requests'	PMSC_LMD1

At the bottom of the window are three buttons: 'View Workflow History', 'View Workflow Map', and 'OK'.

Workflows

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Viewing workflow assignments

You can also view the workflow assignments for a ticket by selecting **Workflow > View Workflow Assignments** from the **Select Action** menu.

In the View Workflow Assignments window, you can perform the following tasks:

- View a list of the active workflow assignments for the record.
- View the workflow history for a record by clicking the button.
- View the workflow map for any processes that are currently managing the record by clicking the button.

Lesson 4 Routing workflow

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Lesson 4 Routing workflow

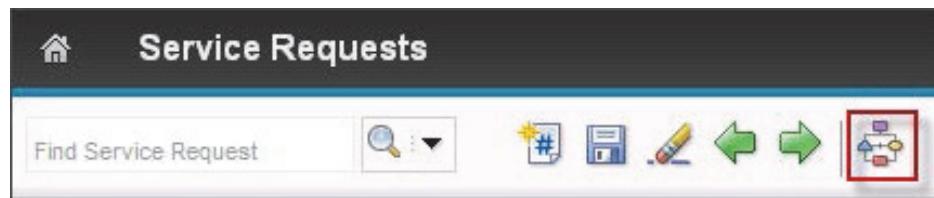
Workflows

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In this lesson, you learn how to perform the following tasks:

- Initiate a workflow and recognize the states of the workflow icon
- Describe the types of workflows and choose the type most appropriate for the outcome that you want
- Stop a workflow or reassign a ticket using a workflow
- Use communication templates within workflows to inform individuals of ticket status

Initiating a workflow



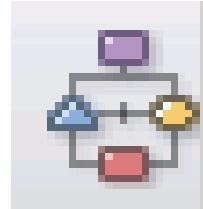
Workflows

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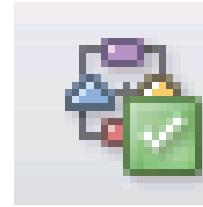
Initiating a workflow

Use the Route Workflow icon or action to Initiate a workflow process for a record.

Workflow toolbar icons



Indicates that the application is workflow-enabled, but that the current ticket is not in a workflow.



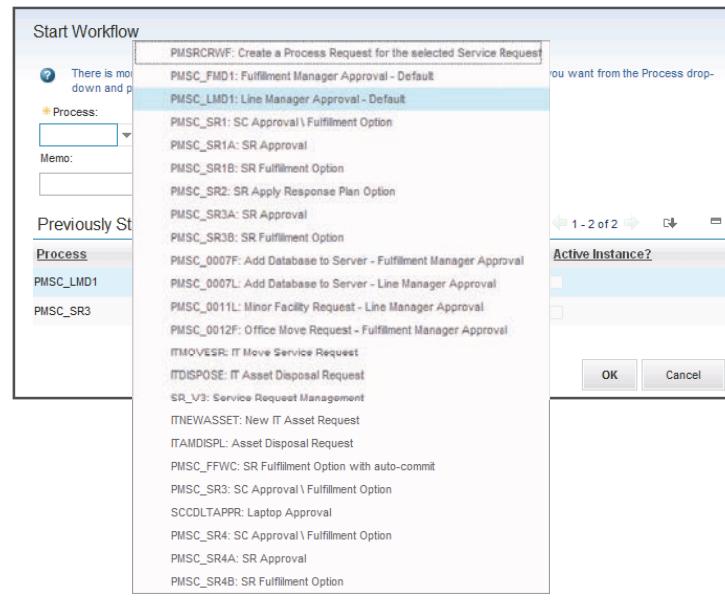
Indicates that the current ticket is under the control of a workflow process.

Workflow toolbar icons

The workflow administrator can configure the application to display one or more workflow icons in the toolbar, depending on the number of active processes that exist for the application. These toolbar icons are used to route a record into a workflow process.

When a workflow process is activated for a ticket, workflow actions and icons are automatically added to the application used to create and manage those tickets.

Multiple applicable workflows



Workflows

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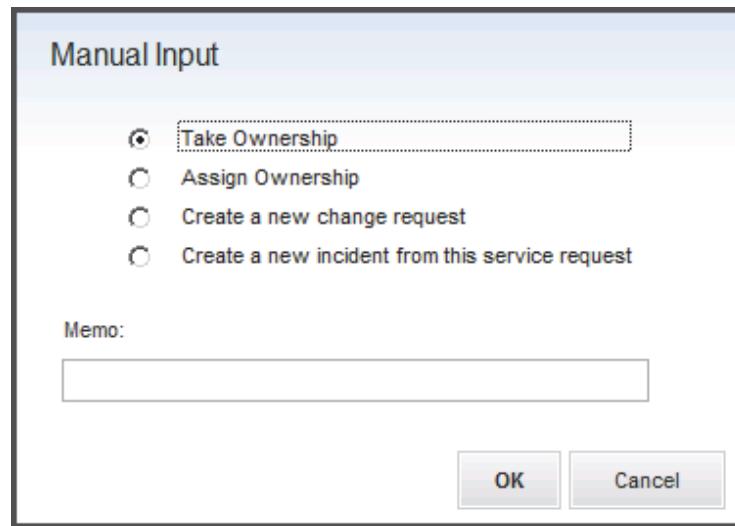
Multiple applicable workflows

There might be more than one workflow that applies to the ticket you are working with. In this case, you must select the workflow.

When a ticket is under the control of a workflow process, the agent might see one of the following types of workflow user interactions:

- Manual Input windows
- Interaction message windows
- Complete Workflow Assignment windows

Manual Input window



Manual Input window

A workflow process might require an agent to decide what action to take regarding the record.

When a Manual Input node is encountered in a workflow process, a Manual Input window opens. The window contains a list of options. These options allow the agent to select what happens to the record.

Some actions that the agent might take include the following examples:

- Performing an action
- Changing the status of a record
- Creating a related record

Interaction window



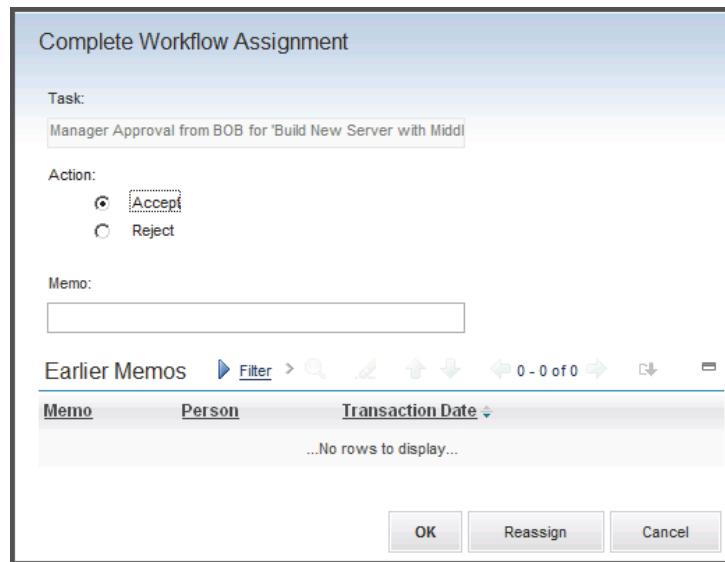
Interaction window

Selecting an option in a Manual Input window might display a second window that contains instructions. The workflow administrator might design the workflow process to guide agents through their interaction with the record. For example, the process might prompt agents to enter data in one or more fields, or to select an action from the application's **Select Action** menu.

When an Interaction node is encountered in a workflow process, any of the following actions might be performed:

- Display an application tab with instructions for adding or modifying data.
- Display instructions to perform a particular application action.
- Automatically trigger an action from the toolbar or **Select Action** menu.
- Automatically trigger a process, such as another workflow process.

Complete Workflow Assignment window



Complete Workflow Assignment window

A workflow process might require someone to review and approve a record. When a Task node is encountered in a workflow process, a task assignment is generated. Notifications of an assignment can be received through email and the Workflow Inbox.

When agents receive an assignment in their Inbox or in an email message, they have two options:

- Click the link to the record to view the record.
- Click the Route icon to complete the assignment.

You can view memos that are entered by individuals who previously reviewed the record. You can also write memos to individuals who might review the record later.

Task assignments can have a time limit. If the assignment is not completed within the specified time limit, the ticket can be escalated.

Reassigning tickets

Select Owner

Persons Person Groups

Person Group:

Date:

Refresh

Persons Filter > 1 - 15 of 112

Person Group	Person	Name	Shift	Open Work
CHAT_Q	MAXADMIN	maxadmin	2	
ITAMFINN	ARUN	Arun Financial Analyst	0	
ITAMHAM	ITAMHAM	ITAMHAM	0	
ITAMINVN	ELMO	Elmo Inventory Admin	0	
ITAMSAM	ITAMSAM	ITAMSAM	0	
PMCFGADM	PMCFGADM	PMCFGADM	0	
PMCFGAUD	PMCFGADM	PMCFGADM	0	
PMCFGLIB	PMCFGADM	PMCFGADM	0	
PMCFGMGR	PMCFGADM	PMCFGADM	0	
PMCHGANA	MAXADMIN	maxadmin	2	

Cancel

Workflows

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Reassigning tickets

If necessary, an agent can reassign a task assignment to another individual. For example, suppose that an agent must decide whether to approve a replacement part for a work order, and a coworker has more experience with the type of repair. The agent might forward the task assignment to the coworker and include a note that asks for the coworker's opinion.

Communication templates and workflow

- Workflow uses communication templates for notifications.
- Many individuals come into contact with a record as it moves through its lifecycle. Often those individuals want or need to know about the progress of the record.

Communication templates and workflow

You can configure the system to generate email messages at the onset of the following events:

- When the system assigns a task
- When the assigned user finishes or rejects a task
- When a Manual Input node is reached
- When the system evaluates a condition to be true or false
- When there is a stop in the workflow

Stopping a workflow



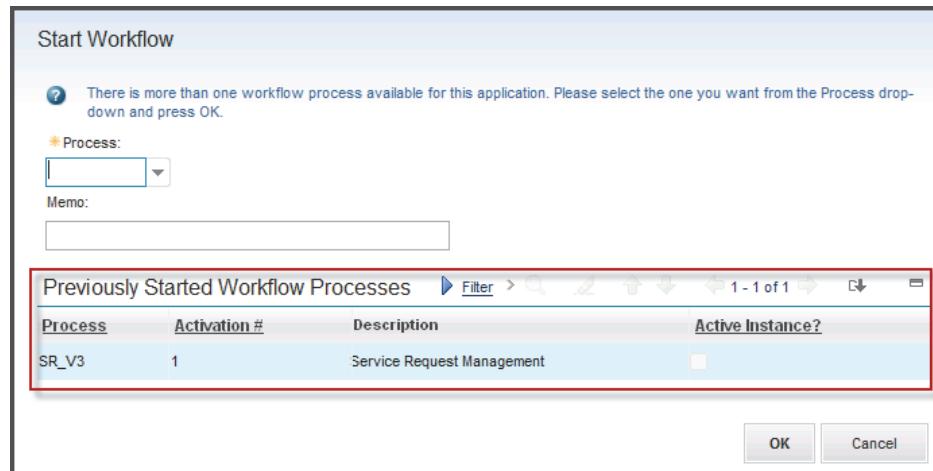
Stopping a workflow

You can stop workflows at any time. When a workflow is stopped, the system takes the record out of Workflow, notifies the specified recipients, and writes a transaction history record.

Both past and current participants of the stoppage can be notified by using a standard communication template or an email message.

The workflow history stays permanently recorded, regardless of whether it was stopped by an administrator, a user, or the end of the workflow.

Previously started workflow processes



Previously started workflow processes

After a workflow is stopped, the workflow is shown in the Previously Started Workflow Processes section of the Start Workflow window.

Lesson 5 Workflow actions

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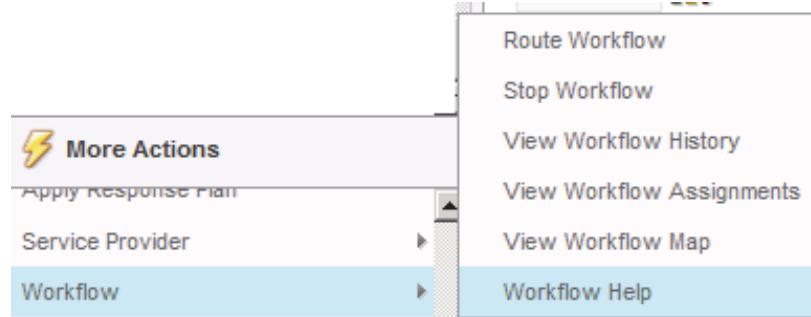
Lesson 5 Workflow actions

Workflows

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In this lesson, you learn how to review workflow history and display help regarding the use of workflows.

Workflow actions



Workflow actions are available from the **Workflow** menu. This menu provides the **Route Workflow** action and the option to stop workflows.

Workflow history

View Workflow History				
Process	Reassigned?	Description	Transaction Date	Person
SR_V3	<input type="checkbox"/>	Process Started	7/31/13 14:50:06	SCOTT
SR_REC3	<input type="checkbox"/>	Process Started	7/31/13 14:50:06	SCOTT
SR_REC3	<input type="checkbox"/>	Followed True Action	7/31/13 14:50:06	SCOTT
SR_REC3	<input type="checkbox"/>	Followed True Action	7/31/13 14:50:06	SCOTT
SR_REC3	<input type="checkbox"/>	Followed True Action	7/31/13 14:50:06	SCOTT
SR_V3	<input type="checkbox"/>	Followed True Action	7/31/13 14:50:06	SCOTT
SR_ROUTE3	<input type="checkbox"/>	Process Started	7/31/13 14:50:06	SCOTT
SR_ROUTE3	<input type="checkbox"/>	Take Ownership	7/31/13 14:50:08	SCOTT
SR_ROUTE3	<input type="checkbox"/>	Routing Action Performed	7/31/13 14:50:10	SCOTT
SR_ROUTE3	<input type="checkbox"/>	Routing Action Performed	7/31/13 14:50:13	SCOTT

Workflow history

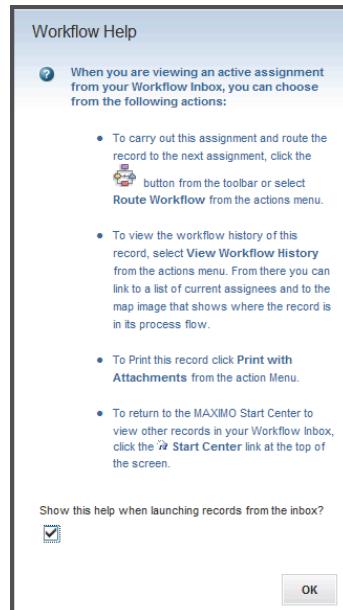
For auditing purposes, a record is maintained of all records that are routed through a workflow process.

The View Workflow History window shows workflow-related actions that users took on the record. The window shows the nodes that the record passed and the type of transaction each node required. It shows what action took place at each node, the date of the action, and the labor code for the action. Some transactions are performed automatically, but they are not displayed.

The Workflows table window includes the following information:

- The name of the workflow process
- The type of transaction
- A description of the action that took place
- The date on which the action occurred
- The person ID of the individual who initiated the action

Workflow Help



Workflows

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Workflow Help

Workflow Help is presented the first time that a workflow is initiated from the inbox.

Lesson 6 Scenarios

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Lesson 6 Scenarios

Workflows

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In this lesson, you learn how to traverse through a service request and an incident, and use workflows at various points to complete the required activities for successful fulfillment of the ticket, whether the resolution of the tickets are successful or not.

Three scenarios

In these examples, the SR_V3 workflow is run to one of three conclusions:

1. A service request is successfully resolved.
2. A service request is unsuccessfully resolved.
3. An incident is created from the service request.

Scenario A: Service request successfully resolved

In this scenario, a call comes in with a simple request. A solution is searched for and found. Finally the request is resolved.

SR successfully resolved: Part 1



Please complete the missing fields



To continue the workflow, complete the following fields:
Source, Description, Site ID, Impact and Urgency, then select
Route Workflow

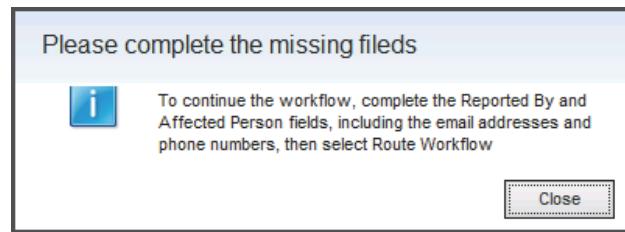
[Close](#)



SR successfully resolved: Part 1

An agent creates a service request and clicks the Route Workflow icon. The workflow starts and determines that some required fields are not completed. An interaction message prompts the agent to complete the fields. After completing the fields, the agent clicks the Route Workflow icon again.

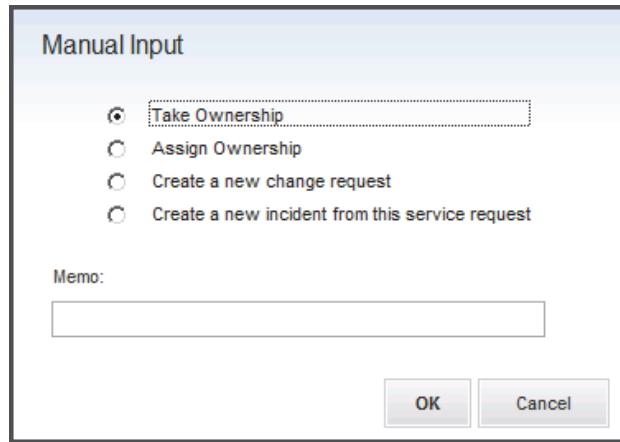
SR successfully resolved: Part 2



SR successfully resolved: Part 2

The agent completed some of the required fields but forgot to list the Affected By and Reported By persons. After completing the fields, the agent clicks the Route Workflow icon again.

SR successfully resolved: Part 3



SR successfully resolved: Part 3

A Manual Input window prompts the agent to change the owner, create a change request, or create an incident. The agent takes ownership.

SR successfully resolved: Part 4

Search For Solutions

Search Existing Solutions Search External Knowledge Base

Search solutions created in the Solutions application. Use one or more of the following fields to specify search criteria. [More information](#)

Search Terms (optional):

Classification: Asset:

Type: Configuration Item:

Search Results [Filter](#) > 0 - 0 of 0

Solution	Description	Times Applied	Priority	Priority	% Effectiveness Score	Status	Creation Date	% Effectiveness Score	Changed Date	In Attachment
To find records, use the filter fields above and then press Enter.										

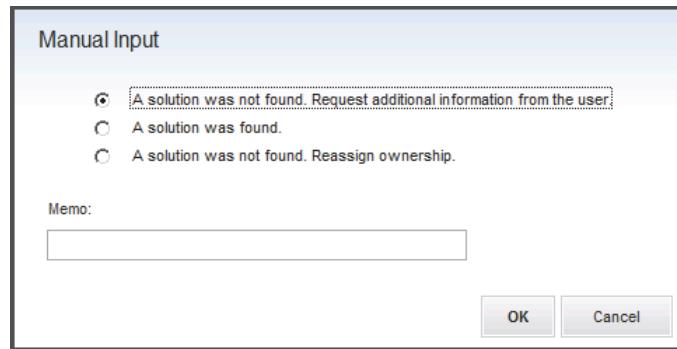


SR successfully resolved: Part 4

The workflow displays the solution window and prompts the agent to search for a solution. If a solution does not exist, the agent can create one. If the agent already knows the solution to the issue, the agent can cancel the solution window.

The agent searches for, and finds, a solution to the issue. The agent then continues the workflow by clicking the Route Workflow icon.

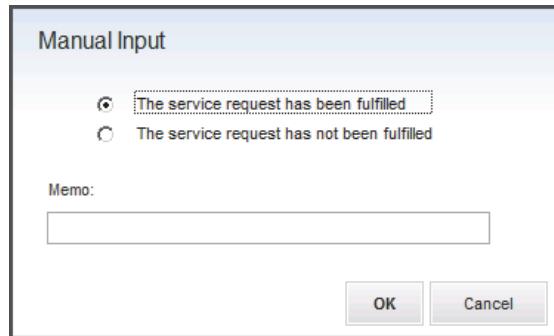
SR successfully resolved: Part 5



SR successfully resolved: Part 5

The agent indicates that the solution was found by selecting **A solution was found**.

SR successfully resolved: Part 6



SR successfully resolved: Part 6

The agent confirms that the service request met the user's expectations and then continues the workflow. The workflow changes the status of the ticket to Closed, and the workflow ends.

SR successfully resolved: Part 7

View Workflow History				
Process	Reassigned?	Description	Transaction Date	Person
▶ SR_V3	□	Process Started	7/31/13 14:50:06	SCOTT
▶ SR_REC3	□	Process Started	7/31/13 14:50:06	SCOTT
▶ SR_REC3	□	Followed True Action	7/31/13 14:50:06	SCOTT
▶ SR_REC3	□	Followed True Action	7/31/13 14:50:06	SCOTT
▶ SR_REC3	□	Followed True Action	7/31/13 14:50:06	SCOTT
▶ SR_V3	□	Followed True Action	7/31/13 14:50:06	SCOTT
▶ SR_ROUTE3	□	Process Started	7/31/13 14:50:06	SCOTT
▶ SR_ROUTE3	□	Take Ownership	7/31/13 14:50:08	SCOTT
▶ SR_ROUTE3	□	Routing Action Performed	7/31/13 14:50:10	SCOTT
▶ SR_ROUTE3	□	Routing Action Performed	7/31/13 14:50:13	SCOTT

SR successfully resolved: Part 7

In this window, the agent can view the workflow history and see the various workflows that are involved and the decisions that are made at each step.

Notice that only the first 10 of 16 steps are shown on this page of the window.

Scenario B: Service request unsuccessfully resolved

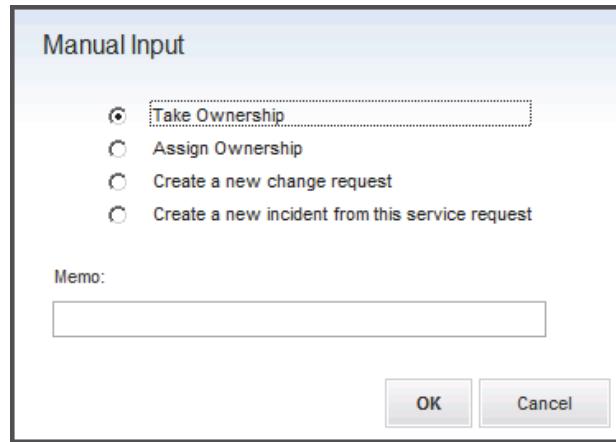
- In this scenario, a call comes in with a request for toner for a printer that the IT department no longer supports.
- A solution is searched for but is not found. The request cannot be fulfilled. The requester, when informed, is not happy and asks to speak to the agent's manager.

Scenario B: Service request unsuccessfully resolved



Attention: For this scenario and the following scenario, the agent properly completes the required fields of the service request ticket before starting the workflow

SR unsuccessfully resolved: Part 1



SR unsuccessfully resolved: Part 1

The agent recognizes that a request for toner is a service request and does not require an incident or change. The agent takes ownership of the ticket. The agent is familiar with the situation regarding these old printers and does not transfer the ticket to another agent.

SR unsuccessfully resolved: Part 2

Search For Solutions

Search Existing Solutions Search External Knowledge Base

Search Terms (optional):

Classification: Asset:

Type: Configuration Item:

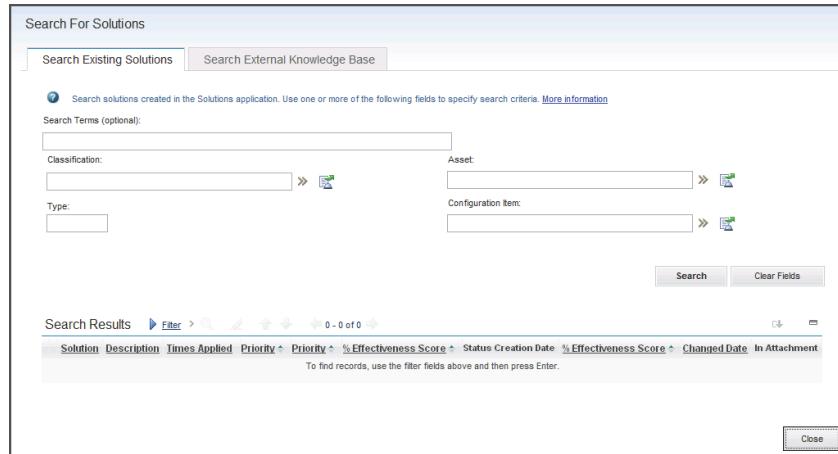
Search Clear Fields

Search Results Filter 0 - 0 of 0

Solution Description Times Applied Priority %Effectiveness Score Status Creation Date %Effectiveness Score Changed Date In Attachment

To find records, use the filter fields above and then press Enter.

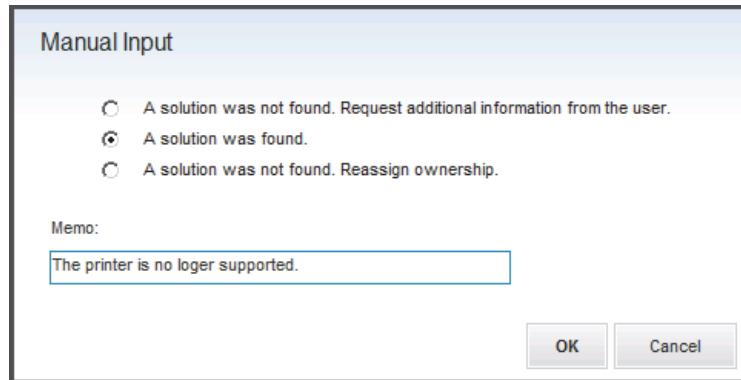
Close



SR unsuccessfully resolved: Part 2

The agent discovers that there is no existing solution in the FAQ regarding the decision to stop supporting the model of printer that the requester is calling about. The agent makes a note to later create a FAQ entry so the next agent in this situation can use it.

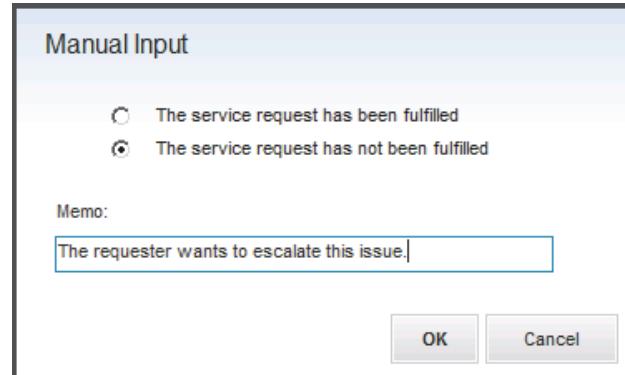
SR unsuccessfully resolved: Part 3



SR unsuccessfully resolved: Part 3

The agent knows the solution to this issue, and enters some descriptive text in the Memo field.

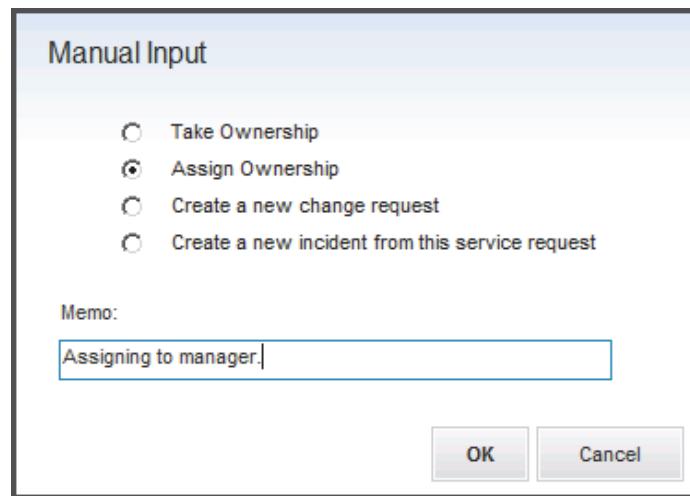
SR unsuccessfully resolved: Part 4



SR unsuccessfully resolved: Part 4

When prompted whether the service request was fulfilled, the agent indicates that it has not, and enters a memo that states the requester wants to escalate the issue to a manager.

SR unsuccessfully resolved: Part 5



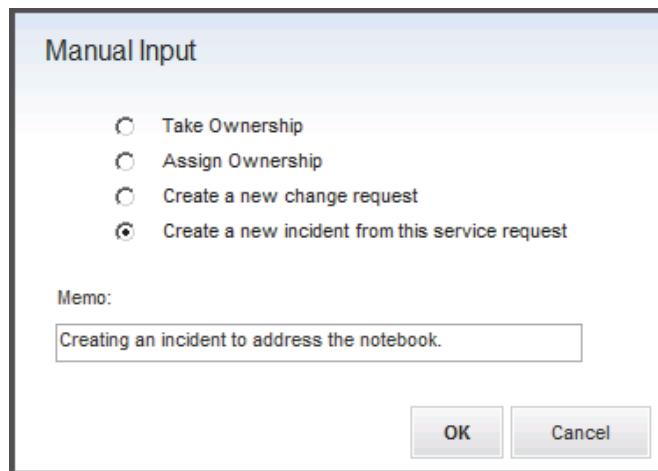
SR unsuccessfully resolved: Part 5

The agent transfers ownership of the service request to a manager.

Scenario C: Handling an incident

- In this scenario, a call comes in with a report of a notebook that will not turn on.
- An incident ticket is created from the service request.

Handling an incident: Part 1



Recognizing that this issue is not a service request, the agent decides to create an incident from the service request. The agent enters a description in the **Memo** field.

Handling an incident: Part 2

Related Tickets		
Related Record Key	Description	Class
1001	Notebook computer running slowly	INCIDENT
		Status
		QUEUED
		Relationship
		FOLLOWUP
Search For Tickets Select Ticket New Row		

Handling an incident: Part 2

The agent goes to the **Related Records** tab of the service request and sees the newly created incident ticket. The Level 2 support person who receives the incident would start the workflow. The workflow would assist the support person through the incident management process.

Review questions

1. What is a workflow?
2. What are some benefits that using workflows provide?
3. What are some capabilities workflows provide?

Review answers

1. What is a workflow?

A workflow can be thought of as a map that guides a ticket, or an agent's interaction with that ticket, through a set of steps. It ensures that user issues are handled in a consistent and repeatable way.

2. What are some benefits that using workflows provide?

Using workflows has the following benefits:

Consistently applies business practices to tickets

Manages the movement of a ticket through a process from start to finish

Routes a ticket and instructions to the appropriate individual or individuals so that they can act on it

Ensures that individuals act on tickets that are assigned to them in a timely manner

Guides users through their interaction with a ticket

Ensures that an audit trail exists for each ticket and process

Student exercises



Workflows

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Student exercises

Summary

- Define the term workflow and explain how workflows help the Service Desk perform its mission
- Successfully resolve a service request using a workflow
- Trace a simple workflow

Workflows

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Summary

Unit 8 Service level agreements

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8 Service level agreements

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This unit covers service level agreements (SLAs), including their purpose and use.

Objectives

- Define service level agreement, and explain how SLAs help the Service Desk perform its mission
- Create a new service level agreement
- Enable SLA hold
- Define a commitment and a notification
- Apply an SLA
- Use SLA hold to stop the clock
- Provide an example of a service level agreement

Lesson 1 Overview

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Lesson 1 Overview

Service Level Agreements

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In this lesson, you learn the definition of a Service Level Agreement and how SLAs are used to ensure appropriate response to a service request, incident, or problem.

Service level agreements

- A **service level agreement (SLA)** is a written agreement between the Service Desk (service provider) and customer. It documents the levels of service the customer will be provided with.
- An SLA is a collection of promises and penalties. It records the promises and penalties, but not the means or details of execution.
- The primary purpose of the SLA is to verify that the customer is getting the level of service required.

Service level agreements

A **service provider** is the organization that supplies services to one or more internal or external customers. You can think of it as the Service Desk answering the requests and issues of its customers.

The SLA describes the service, documents service level targets, and specifies the responsibilities of the service provider and the customer. A single SLA can cover multiple IT services or multiple customers.

Why SLAs are needed

- In a perfect world, all customer contacts with the Service Desk would be handled instantly.
- In the real world, Service Desks are busy, support staffs are overworked, and things always take longer than expected.
- SLAs are a compromise between the level of service that the customer requires and the level that the Service Desk (IT and technical support) can provide, based on resources available and overall cost.

Lesson 2 Commitments

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Lesson 2 Commitments

Service Level Agreements

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In this lesson, you learn how to perform the following tasks:

- Define a commitment within a Service Level Agreement
- Describe the various forms a commitment can take
- Correlate commitments with specific timeframes
- Determine if a commitment has been met or not
- Describe circumstances that can influence the calculation of commitment dates and times

Definition of a commitment

- In the SLA, the Service Desk commits to doing something within a certain time or up to a certain level. These are the promises mentioned earlier.
- A **commitment** is a specific responsibility that the service provider must meet to fulfill the service level agreement with the customer.

Definition of a commitment

Remember that a service is a set of tasks that are provided by the service provider that fulfills one or more of a customer's needs. The service level (known as a *commitment* in IBM Control Desk) describes a measurable or quantifiable aspect of that service.

Commitment forms

Commitments in SmartCloud Control Desk take the following forms:

- **Contact:** Identifies when interaction begins with requester (for example, return call or email). Applies only to self-service and email requests.
- **Response:** The Service Desk must start working on a new ticket within a set amount of time.
- **Resolve:** The Service Desk must resolve the request or issue the ticket within a set amount of time.
- **Other:** Some other promise that is made between the Service Desk and the customer. Some examples are reliability, availability, and downtime.

Commitment forms

Examples of the Other commitment form are as follows:

- A web server is available at a higher than 95% level.
- A network switch is down less than 5 minutes a month.

This unit focuses on the contact, response, and resolve types.

Service level agreement example

- CompanyX (running the Service Desk) has an SLA agreement with a customer.
- The SLA states that CompanyX must do the following tasks:
 - **Contact** the person who emailed or created their own service request within **30 minutes**
 - **Respond** to requests or issues within **2 hours**
 - **Resolve** requests or issues within **4 days**
- If these commitments are not met at a level higher than 95% each month, there are penalties against CompanyX.

Commitment points

Contact within 30 minutes



Respond within 2 hours



Resolve within 4 days



If the commitment is not met by the marked point, CompanyX is in violation of the service level agreement.

Determining whether a commitment was met

- SmartCloud Control Desk has an automated process (cron task) that constantly checks the difference between the current time and the commitment time.
- At the bottom of a ticket is a **Dates** section that contains timestamps of when events have occurred or must occur by.
- There are three types of timestamps:
 - **Baseline:** These track when events start.
 - **Target:** These track when commitments expire. They are set when an SLA is applied to a ticket.
 - **Actual:** These track when events occur. They are set when the status of a ticket is changed.

Baseline dates

View SLAs			
Reported Date: 6/12/13 14:21:11	Target Contact: 6/12/13 15:21:11	Adjusted Contact: 6/12/13 15:21:11	Actual Contact:
Affected Date: 6/12/13 14:21:11	Target Start: 6/13/13 02:21:11	Adjusted Start: 6/13/13 02:21:11	Actual Start: 6/12/13 14:41:44
Creation Date: 6/12/13 14:21:11	Target Finish: 6/13/13 14:21:11	Adjusted Finish: 6/13/13 14:21:11	Actual Finish: 6/12/13 14:42:49
Accumulated Hold Time(HH:MM): 0:00			

Reported Date

When issue was first reported

Affected Date

When the issue first affected the requester

Creation Date

When the ticket was created

Reported date is set when the request or issue was first reported. This date typically is the same as the creation date.

Affected date is set to when the issue first affected the user, which might be some time before it was reported. This field is optional.

Creation date is set when the ticket is first created.

Target and Adjusted dates

View SLAs		
Reported Date: 6/12/13 14:21:11	Target Contact: 6/12/13 15:21:11	Adjusted Contact: 6/12/13 15:21:11
Affected Date: 6/12/13 14:21:11	Target Start: 6/13/13 02:21:11	Adjusted Start: 6/13/13 02:21:11
Creation Date: 6/12/13 14:21:11	Target Finish: 6/13/13 14:21:11	Adjusted Finish: 6/13/13 14:21:11
		Accumulated Hold Time(HH:MM): 0:00

Target Contact

Date and time by which contact is to occur

Target Start

Date and time that work should begin on issue

Target Finish

Date and time by which issue is to be resolved

Adjusted dates are target dates that have been offset by SLA Hold.

Target and Adjusted dates

When an SLA is applied to the ticket, depending on the type commitment present, these actions occur:

- If it includes a contact commitment, the system enters a value in the **Target Contact** field.
- If it includes a response commitment, the system enters a value in the **Target Start** field.
- If it includes a resolution commitment, the system enters a value in the **Target Finish** field.

Adjusted and Actual dates

View SLAs

Reported Date: 6/12/13 14:21:11	Target Contact: 6/12/13 15:21:11	Adjusted Contact: 6/12/13 15:21:11	Actual Contact: <input type="text"/>
Affected Date: 6/12/13 14:21:11	Target Start: 6/13/13 02:21:11	Adjusted Start: 6/13/13 02:21:11	Actual Start: 6/12/13 14:41:44
Creation Date: 6/12/13 14:21:11	Target Finish: 6/13/13 14:21:11	Adjusted Finish: 6/13/13 14:21:11	Actual Finish: 6/12/13 14:42:49
Accumulated Hold Time(HH:MM): 0:00			

Actual Contact

Actual Contact is manually supplied by the person who contacts the user.

Actual Start

Actual Start is set when the status of the ticket changes to In Progress.

Actual Finish

Actual Finish is set when the status of the ticket changes to Resolved.

When the ticket status is set to Queued, and if an SLA with a contact commitment was applied, the **Actual Contact** field is set.

When the ticket status is set to In Progress, the **Actual Start** field is set. This status indicates that work has started on the ticket, and not just when the ticket was delegated to someone.

When the ticket status is set to Resolved, the **Actual Finish** field is set.

Example: SLA was applied to a ticket

Ticket created on March 3 at 12:00:

- Must contact requester by 12:30
(12:00 + 30 minutes = 12:30)
- Must respond to issue by 14:00
(12:00 + 2 hours = 14:00)
- Must resolve issue by March 7 at 12:00
(3/3 12:00 + 4 days = 3/7 12:00)

Dates	
Reported Date:	Target Contact:
3/3/12 12:00	3/3/12 12:30
Affected Date:	Target Start:
3/3/12 12:00	3/3/12 14:00
Creation Date:	Target Finish:
3/3/12 12:00	3/7/12 12:00

Example: SLA was applied to a ticket



Attention: The seconds were removed from the image for clarity.

Example: Checking to see whether commitments were met

Dates		
Reported Date: 3/3/12 12:00	Target Contact: 3/3/12 12:30	Actual Contact: 3/3/12 12:04
Affected Date: 3/3/12 12:00	Target Start: 3/3/12 14:00	Actual Start: 3/3/12 12:30
Creation Date: 3/3/12 12:00	Target Finish: 3/7/12 12:00	Actual Finish: 3/9/14 14:00

- Must contact requester by **12:30**
Requester contacted at **12:04**
- Must respond to issue by **14:00**
Issue responded to at **12:30**
- Must resolve issue by **March 7 at 12:00**
Issue resolved at **March 9 at 14:00**



Lesson 3 Escalations

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Lesson 3 Escalations

Service Level Agreements

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In this lesson, you learn how to perform the following tasks:

- Understand and create escalations
- Associate SLA commitments with escalations

Overview of escalations

- Through escalations, you can be notified that a commitment is in risk of being broken.
- Escalations can automatically perform tasks when certain events occur.
- An **escalation** is a Tivoli's process automation engine function that can automatically monitor specific processes. Upon reaching a specified predetermined point (known as an **escalation point**), it can cause things to happen.
- The primary goal of escalations is to ensure that critical tasks are completed on time.

Workflows also use escalations.

Escalation abilities

Escalations can do two things:

- They can perform a function automatically (action).
- They can send an email (notification).

There is no one standard escalation. Administrators customize escalations to perform the needed function.

Escalations and SLAs

Use escalations to perform actions such as:

- Send a notification to an agent or manager
- Change priority of a ticket
- Reassign ownership of a ticket to another agent or manager

These escalations do not have to be done all at once. They can be set up to work in a graduated form. First, an administrator can send a reminder notification to an agent. Later, if the commitment is still at risk of not being met, more serious action can be taken. For example, the ticket can be reassigned and the agent's manager can be notified.

Escalation example

Contact within 30 minutes



Respond within 2 hours



Resolve within 4 days



Escalation example

CompanyX sets up the following escalations:

- **Contact:** If there is no contact 10 minutes before the commitment would be broken, then these actions occur:
 - Send a notification to inform the agent that a commitment is in danger of being broken
 - Response: If there is no response to the request or issue 1 hour before the commitment would be broken, then these actions occur:
 - ◆ Set the ticket priority to very high
 - ◆ Send a notification to the agent and the agent's supervisor that informs them that a commitment is in danger of being broken
- **Resolution:** If there is no resolution to the request or issue one day before the commitment would be broken, then these actions occur:
 - Send a notification to the agent's supervisor and the department manager that informs them that a commitment is in danger of being broken
 - Transfer the ticket to another agent
 - Send a notification to the agents that informs them of the transfer

Lesson 4 Applying service level agreements

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Lesson 4 Applying service level agreements

Service Level Agreements

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In this lesson, you learn how to perform the following tasks:

- Apply SLAs to a Control Desk ticket
- Determine when SLAs are in effect
- Describe SLA Hold and explain how it can affect commitments

Applying SLAs: Methods

- To **apply** a service level agreement means to associate an SLA with a ticket.
- An SLA can be applied in different ways:
 - The system might apply an SLA automatically through a workflow or escalation process, or through another SLA. This method is the most common way SLAs are applied.
 - An agent can use the **Apply an SLA** action. With this method, the system chooses and applies the most appropriate SLA or SLAs to the record.
 - An agent can use the **Select or Deselect an SLA** action to view and select an SLA to apply to a ticket. This method can also be used to remove an applied SLA.

Adding or removing an SLA on a ticket causes IBM Control Desk to perform these actions:

- Recalculate any Target Contact, Target Start, and Target Finish dates
- Activate or deactivate any escalations that are associated with the added or removed SLA

Notification that SLA has been applied

 BMXAQ0091I - SLA S1001 has been applied.

Notification that SLA has been applied

When an SLA is applied to a ticket, a status message is displayed briefly.

Verifying that an SLA has been applied

Key Dates

Reported Date:
6/12/13 14:21:11

Actual Contact:

Actual Finish:
6/12/13 14:42:49

[View SLAs](#)

SLA Applied?



SLA Hold Enabled?



SLAs						
SLA	Description	Applies To	Type	Adjusted Contact Time	Adjusted Response Time	Adjusted Resolution Time
▶ 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

Verifying that an SLA has been applied

To confirm that an SLA was applied, view the **SLA Applied** check box on the ticket. This check box is selected when an SLA was applied to a ticket.

Another method to verify that an SLA was applied is to use the **More Actions > View SLAs** option.

Multiple service level agreements

- There can be as many SLAs as a company wants.
- There are separate SLAs for each of the ticket types.

Multiple service level agreements

For example, separate SLAs can exist for each of the following situations:

- Problem tickets with network issues (Classification)
- Incidents with a high internal priority (Priority)
- The company CEO listed as the Affected By person (Affected By)
- Problems that are related to model A1234 printers (Asset)
- Service requests from the Minneapolis site (Site)
- Network incidents with a high internal priority from the CEO related to model A1234 printers at the Minneapolis site that belong to the Network Service group (Classification, Priority, Asset, Site, Service Group)

Determining when SLAs are in effect

- For organizations that are not open 24 hours a day, 365 days a year, there must be some periods when the Service Desk is closed. SLAs should not be in effect during these times.
- SmartCloud Control Desk uses the Calendars and Shifts information to determine when a Service Desk is and is not open.

Determining when SLAs are in effect

For example, suppose that an organization is open only from 9:00 AM to 5:00 PM, Monday through Friday, and a service request comes in on Saturday. In this case, the SLA does not begin to apply until 9:00 AM on Monday. This determination is made through a combination of Tivoli's process automation engine common calendars and shifts.

SLA hold

- You can use an **SLA hold** to avoid unnecessary penalties for violating SLAs. With an SLA hold, the SLA clock can be paused when something occurs beyond the control of IT staff.
- After an SLA is put on hold, escalations that are associated to that SLA will not trigger until the SLA is taken off of the hold.

SLA hold is optional. An administrator can enable or disable it.

Review questions

1. What is an SLA?
2. What are three common commitments that SLAs monitor?
3. What mechanism is used to ensure that SLAs are met?

Review answers

1. What is an SLA?

A service level agreement (SLA) is a written agreement between the Service Desk (service provider) and customer. It documents the levels of service with which the customer will be provided.

2. What are three common commitments that SLAs monitor?

Contact: *Identifies when interaction begins with requester (for example, return call or email). Applies only to self-service and email requests.*

Response: *The Service Desk must start working on a new ticket within a set amount of time.*

Resolve: *The Service Desk must resolve the request or issue the ticket within a set amount of time.*

3. What mechanism is used to ensure that SLAs are met?

SLAs are monitored and automatically acted upon by escalations. These escalations can automatically perform tasks and send notifications when certain events occur.

Student exercises



Service Level Agreements

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Student exercises

Perform the exercises for this unit.

Summary

- Define service level agreement, and explain how SLAs help the Service Desk perform its mission
- Create a new service level agreement
- Enable SLA hold
- Define a commitment and a notification
- Apply an SLA
- Use SLA hold to stop the clock
- Provide an example of a service level agreement

Service Level Agreements

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Summary

Unit 9 Surveys

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9 Surveys

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With IBM Control Desk, you can create and send customer satisfaction surveys. This unit describes the various survey techniques and tools that you can use to create a survey.

Objectives

- Determine whether to track a survey or not
- Create a survey template
- Create a survey

Lesson 1 Measuring satisfaction

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Lesson 1 Measuring satisfaction

Surveys

3

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In this lesson, you learn what customer satisfaction is and how surveys can help determine the level of customer satisfaction a company experiences. You also learn to describe the types of surveys within IBM Control Desk and the time at which a survey can be sent.

Assessing customer satisfaction

- Customer surveys can help assess customer satisfaction and evaluate the performance of all areas of the Service Desk and Service Catalog.
- Customer satisfaction surveys are used to gather these qualitative evaluations.
- With performance metrics, surveys enhance management's ability to gauge service desk performance.

Survey timing

Examples of when a survey might be used:

- Each time a user creates a self-service service request.
- Every 6 months to all users who have had a service request that is created on their behalf.
- Every 20th user when a service request is marked resolved.
- When the 50th resolved or closed incident ticket is generated in the system, an email message is sent to the user who created that ticket

Survey types

Three sample surveys are included with IBM Control Desk:

- Service Request
- Incident
- Problem

Lesson 2 Survey forms

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Lesson 2 Survey forms

Surveys

7

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In this lesson, you learn the terms tracked and untracked survey, and you learn how the survey types are defined in IBM Control Desk.

Tracked versus untracked survey forms

- Surveys take different forms, depending on whether you want to know who is filling them out:
 - Tracked
 - Untracked
- Which form a user receives depends on the survey URL sent to that user.

Surveys

8

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Tracked versus untracked survey forms

Tracked surveys

- Tracked surveys require users to log in to complete the survey. The **Survey** application keeps track of who 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 Maximo-based and is accessed through the **Survey Request** self-service application.

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

Surveys

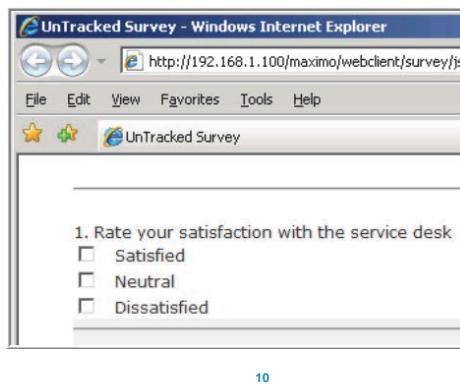
9

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Tracked surveys

Untracked surveys

- Untracked surveys do not track users, so users can complete surveys anonymously.
- Users access these surveys through a direct link to the survey; there is no need to log in to IBM Control Desk. This survey type is JavaServer Page (JSP) browser-based.



Untracked surveys

Untracked surveys might encourage honest participation due to their anonymous nature. However, you have no direct control over who takes the survey or how many times it is taken.

Lesson 3 Creating a survey

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Lesson 3 Creating a survey

Surveys

11

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In this lesson, you learn how to perform the following tasks:

- Create question and answer sets to be used in a survey
- Apply relative weight to each question within the survey
- Create a new survey with the survey tool
- Preview tracked and untracked surveys
- Apply questions to a survey and change the survey status to active
- Create a survey template and optionally add a graphic to it

Survey creation overview

- Surveys are created by using the following steps:
- Create a set of questions in the Questions application.
- Create a survey template in the Survey Template application (optional).
- Create a survey in the Survey application.
- Assign the survey to a Maximo object.
- Assign questions to the survey.
- Apply a template (optional).

Survey creation overview

After you create a survey template, you can quickly and easily apply it to surveys. Templates can make surveys appear more personalized, and can provide useful information, such as contact information, to users.

Create 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. A question can be associated to more than one survey.
- The new **Survey Question Management** application is used to create and maintain questions that are used in surveys.

Create question-and-answer sets



Note: You can assign questions to a particular organization or site if you want.



Note: Questions are created in an active state by default.

Question details

- Each question has a type:
 - Check box
 - Freeform
 - Radio button

Select Value	
Value	Description
CHECKBOX	Check Box(Multiple Answers)
FREEFORM	Freeform
RADIO	Radio Button(Only One Answer)

- The status of a question can be:
 - Active (default)
 - Archive

Question details

Question attributes

Questions have two attributes:

- Order
- Weight

Answers		Filter >	Search	Up	Down	1 - 3 of 3	Next	Cancel
Answer		Weight	Order					
Satisfied		1	1					
Neutral		2	2					
Dissatisfied		3	3					

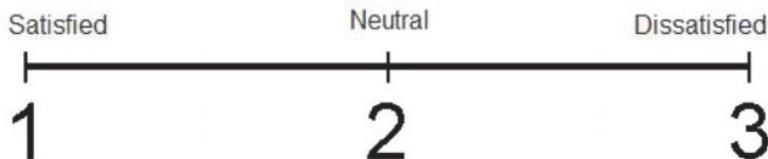
Question attributes

Question order

Order determines the sequence of the answers in the survey. Using this attribute, you can resequence answers independently of the order in which they are shown in the **Answer** section.

Question weight

- Use **weight** to define a range of possible values, important for reporting. This attribute is usually used for satisfaction-type questions.
- For example, assume that 1 represents satisfied and 3 represents dissatisfied. After a report averages the responses, it is obvious that a 1.2 average represents many satisfied customers, and a 2.6 average represents many dissatisfied customers.



Create a survey template

- You can create survey templates to be used when creating a survey. These templates populate certain survey fields with predefined values, saving you time when creating surveys.
- The **Survey Template** application is used to define the following fields:
 - **Header:** The survey heading
 - **Subheader:** Description or custom messages that the respondent can read before completing the final survey
 - **Footer:** Custom footer message displayed after the user completes the survey
 - **Image:** Company logo or some other image

Sample survey template

The screenshot shows a survey interface with the following elements:

- Header:** "List View", "Survey", "Survey Preview".
- Image:** IBM logo.
- Title:** "Service Request Survey".
- Text:** "Dear customer, please fill out our survey".
- Section:** "Fill the questions for the survey".
- Question 1:** "1. Have you experienced this issue in the past?"
Options: Yes, No.
- Text at bottom:** "If you have any questions, please contact us at 555-1234."
- Buttons:** "Submit Survey".

Sample survey template

Shown is the header, image, and subheader.

Create the survey

- You can create new surveys and 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 changes for the survey is Draft, Active, and Closed.

Create the survey

When the status is in draft, the 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. When the status is active, the survey cannot be changed back to draft. Once in an active state, the survey questions and answers cannot be updated.

If you want to make updates to an active survey, you need to change the status of the active survey to closed. Then you can duplicate the original survey. The new duplicate survey starts out 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.

Assign a Maximo object to the survey

- Beyond the standard attributes like the ID and description, there is an **Applies To** field.
- The **Applies To** field is used when automatically sending a survey. This method is performed through an escalation. The object that is specified in the **Applies To** field is the type of object that triggers the escalation.
- If you only plan to send a survey manually, you can set the **Applies To** object to **Default**.

Survey ID: 1001
Survey: SRM Survey
Description: Demo SR Survey
Applies To: SR

Template Id:

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Assign a Maximo object to the survey

Tracked and untracked URLs

- As soon as the **Applies To** object is entered, the **Tracked URL** and **UnTracked URL** fields are automatically populated.
- These are the URLs sent out to the customers.

Status: DRAFT
Creation Date: 1/9/12 15:25:31
Changed Date: 1/9/12 15:25:31
Site:

Organization:

Created By: SDADMIN

Tracked URL: http://tsrmvcell52.tivlab.raleigh.ibm.com/maximo/ui/maximo.jsp?
UnTracked URL: http://tsrmvcell52.tivlab.raleigh.ibm.com/maximo/webclient/sur

Assign questions

- Assign previously created questions to the survey.
- Their order can be modified.

Select Questions

Question ID	Question	Type	Status	Creation Date	Created By	Site
1001	Rate your satisfaction with the service desk.	RADIO	ACTIVE	6/14/13 16:44:01	MAXADMIN	
1002	What methods did you try to resolve the issue?	CHECKBOX	ACTIVE	6/14/13 16:56:17	MAXADMIN	

OK Cancel

Assign questions

Apply a template

- Apply a template to the survey.
- The survey is now ready to be sent out.

Apply a template

Preview the survey

- Before deploying a survey, preview it to make sure that everything is correct.
- Because surveys have two different forms, **Tracked** (Maximo-based) and **Untracked** (JSP browser-based), they are each previewed differently.

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Preview the survey

Previewing tracked surveys

- You can preview tracked surveys by using the **Survey Preview** tab. This tab displays the survey inside of IBM Control Desk.

The screenshot shows the 'Survey Preview' tab selected in the top navigation bar. Below the tab, there is a heading 'Fill the questions for the survey'. The first question is '1. Rate your satisfaction with the service desk.' with three radio button options: 'Satisfied' (selected), 'Neutral', and 'Dissatisfied'. The second question is '2. What methods did you try to resolve the issue?'. Below this question, there is a 'Select Answer' dropdown menu. Underneath the dropdown, there is a list of four items, each with a checkbox:

- Check all boxes
- Self service
- Telephone support
- Other

Previewing untracked surveys

You can preview untracked surveys by using a browser.

1. Rate your satisfaction with the service desk.

- Satisfied
- Neutral
- Dissatisfied

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

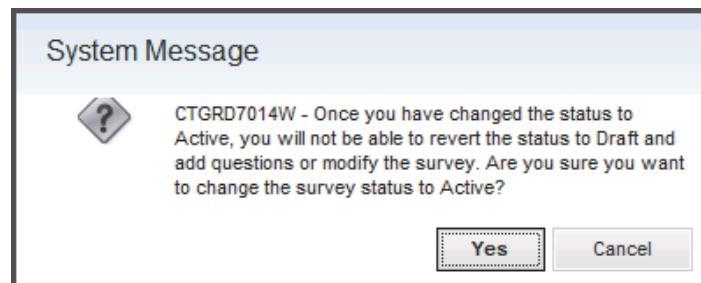
- Self service
- Telephone support
- Other

Previewing untracked surveys

Notice that the display of the survey looks a little different between the tracked and untracked surveys. The reason is that more control over the formatting is possible with the JSP-based untracked surveys over the capabilities included in Maximo-tracked surveys.

Activate the survey

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



Activate the survey

After you activate a survey, you cannot edit it again. If changes are required, you must create a new survey.

Lesson 4 Sending surveys

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Lesson 4 Sending surveys

Surveys

29

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In this lesson, you learn how to perform the following tasks:

- Send surveys manually or automatically, based on escalations
- Associate surveys with communication templates
- Take surveys, noting the differences between tracked and untracked surveys
- Review survey results
- Associate a survey to a particular Control Desk ticket

Methods for sending surveys

Surveys can be sent to the users in either of the following ways:

- **Manually:** Surveys can be sent immediately after a call
- **Automatically** (using condition or escalation): Surveys can be sent after a number of days, number of tickets, and so on

Methods for sending surveys



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

Survey communication templates

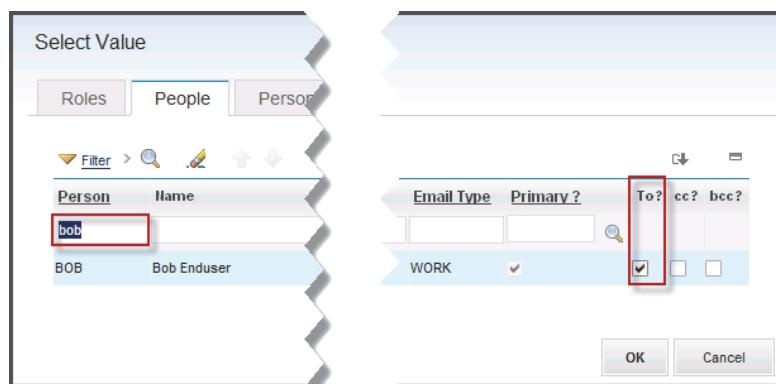
Included with the best-practice materials are the two survey communication templates that are shown in the following image.

Template	Description
<input type="text"/>	
<u>SURVEYTRACKED</u>	Communication Template for sending a Tracked Survey.
<u>SURVEYUNTRACKED</u>	Communication Template for sending a Un-Tracked Survey.

Survey communication templates

Manually sending a survey

Use the **Send Survey** Select Action menu item to create the email. Then, apply a communication template and send.



Manually sending a survey

Automatically sending a survey

- Using escalations, you can enable a survey to be sent to a particular user or group of users automatically when a particular condition is met.
- The **Survey** application **Escalation** section lists the set of escalation records that are defined for this survey. You use this section to define escalation records. You can define one or more escalations for one survey.
- One example is to send a survey automatically after a service request is closed.

Surveys

33

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Automatically sending a survey

Viewing the number of survey responses received

- The **Survey Results** tab of the **Surveys** application keeps a running total of responses that are received from all surveys sent.
- If no survey is selected, a list of all surveys is shown with the number of responses 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

Surveys

34

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Viewing the number of survey responses received

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Taking a tracked survey

After clicking this type of URL from the email message, the user is taken to the **IBM Control Desk** login page. Upon successful authentication, the new **Survey Request** application automatically opens and the user sees the survey.

The screenshot shows the IBM Control Desk interface. At the top, there's an email header with 'From: sdadmin@tivoli.edu' and 'Subject: Tracked Survey'. Below it is a toolbar with 'Reply', 'Forward', 'Archive', and 'Junk' buttons. The main area is titled 'Survey Request' with a 'Filter' dropdown and search icons. A table lists a single survey entry:

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

At the bottom, there are navigation links for 'Surveys', '35', and '© Copyright IBM Corporation 2016'.

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Taking an untracked survey

- Untracked surveys work similarly to tracked surveys, except that a Web browser is launched instead of IBM Control Desk.
- A message thanking the user for responding to the survey is displayed after the survey is complete. Text and messages in the surveys is intended to be customized.

Viewing survey results

The screenshot shows the 'Survey Results' tab selected in a navigation bar. The main title is 'SRM Survey'. Below it, survey statistics are displayed: Survey Status: ACTIVE, Launched: 7/25/13 20:23:50, Closed:, Email Invites: 2, Viewed: 2, Submitted: 2 (Does not include blank responses). A question '1. Rate your satisfaction with the service desk.' is listed. Below it is a table titled 'Results' showing the distribution of responses:

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

Viewing survey results

When a survey is selected, the **Survey Results** tab shows simple statistics of the selected survey. You can see how many email invites 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 into a discrete count and percentage. Free-form type questions have a list of the answers submitted by each respondent.

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. Seeing the results can show you how satisfied the customer was with the handling of the issue.
- Surveys can be associated with tickets.

Related Survey Record		
Survey ID	Survey	Description
1001	» SRM Survey	Demo SR Survey

Review questions

1. What are the two types of surveys?
2. How often should you send out surveys?
3. What types of answers are supported in surveys?

Review answers

1. What are the two types of surveys?

Tracked and untracked.

2. How often should you send out surveys?

The answer depends on many factors, and can change over time. There is no easy answer to this question.

Some factors that should be considered include the length of time required to complete the survey, the willingness of recipients to complete surveys, and the quality of the feedback you expect to receive from the surveys. Experimentation is advised

3. What types of answers are supported in surveys?

Freeform text, check box, and radio button.

Student exercises



Summary

- Determine whether to track a survey or not
- Create a survey template
- Create a survey

Unit 10 Reporting

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10 Reporting

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This unit provides an overview of the reporting capability in IBM Control Desk.

Objectives

- Define reporting options
- Run predefined reports

Lesson 1 Overview

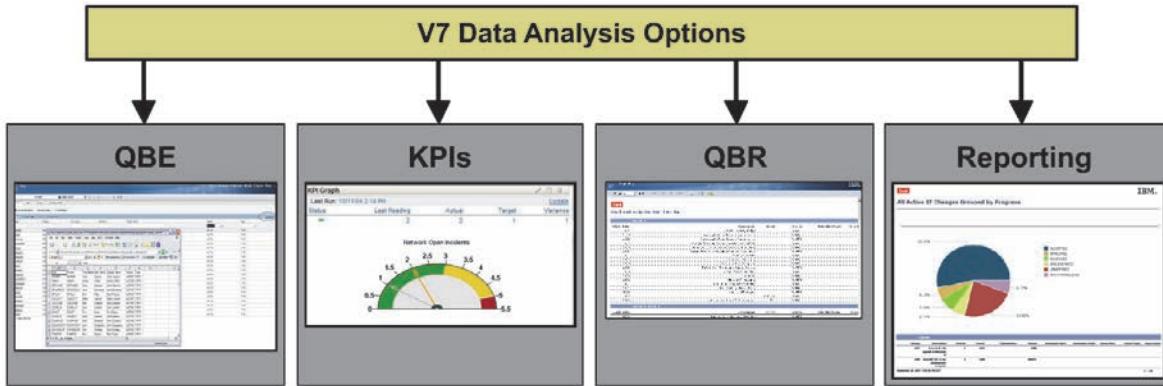
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Lesson 1 Overview

In this lesson, you learn how to recognize and choose from the various types of reports within IBM Control Desk, selecting the ones that are most appropriate for the specific information that you seek to extract from the Control Desk data.

Data analysis options



Data analysis options

Various mechanisms are available to analyze data. These mechanisms present the data in various formats so that the user can quickly get the information to make the best business decisions possible.

Depending on the individual business case and user, you might want to evaluate by using data analysis options other than Reporting.

- **Query by example (QBE) or application list download:** QBE is available from all Application List pages. The user can immediately download the results to Microsoft Excel® for closer analysis. The QBE is a way for all users to analyze the data. QBEs do not run in the Business Intelligence and Reporting Tool (BIRT) Report Engine.
- **Key performance indicators (KPIs):** KPIs are metrics that highlight performance against a set goal. KPIs are available in list and graphic format. They quickly highlight status in red, yellow, and green. KPIs also link to reports and display historical trending for additional data analysis. KPIs do not run in the BIRT Report Engine.
- **Query-based reporting (QBR):** QBRs enable ad hoc reporting by using the BIRT Report Engine. With a QBR, the user can create a unique report by using a wizard. The wizard guides the user in selecting, naming, and ordering the fields, and then determining whether to save this unique report. Additionally, QBRs can be scheduled, emailed, and enabled for security access.

Reporting



Reporting

Reporting is a valuable tool for managing the Service Desk function and the service support processes.

IBM Control Desk ships with a set of reports. These reports provide information about Service Desk incidents, problems, service requests, and solutions, and Service Catalog orders.

The formatted and concise information from these reports provides management with meaningful data. With reports, management can make informed business decisions and assess Service Desk performance within the ITIL framework and processes.

Formats include lists, detailed analyses, expanded views, tables, and graphical reports. Over 450 reports are available in Version 7.6.1 of IBM Control Desk.

The Report Administration application

The screenshot shows the Report Administration application interface. At the top, there's a toolbar with icons for Find Report File, Save Query, Bookmarks, Advanced Search, Filter, and other report management functions. Below the toolbar is a navigation bar with Reports, Filter, and a search bar. The main area displays a table of reports with columns: Report File Name, Description, Application, Report Folder, and Report Type. The table lists 1 - 20 of 470 reports. Some rows are collapsed under expandable arrows.

Report File Name	Description	Application	Report Folder	Report Type
actualci_detail.rptdesign	Actual CI Details	ACTUALCI	ACTUALCI	BIRT
actualci_history.rptdesign	Actual CI History	ACTUALCI	ACTUALCI	BIRT
flagged_actualci.rptdesign	Actual CIs Flagged for Deletion	ACTUALCI	ACTUALCI	BIRT
deleted_actualci.rptdesign	Deleted Actual CIs	ACTUALCI	ACTUALCI	BIRT
#classcounts.rptdesign	IT Asset Counts by Classification	ASSET	ASSET	BIRT
assetpurchasecost.rptdesign	Asset Purchase Cost Rollup	ASSET	ASSET	BIRT
asset_availability.rptdesign	Asset Availability	ASSET	ASSET	BIRT
detailasset_fail.rptdesign	Details of Asset Failures	ASSET	ASSET	BIRT
sumasset_fail.rptdesign	Summary of Asset Failures by Location	ASSET	ASSET	BIRT
asset_costrollup.rptdesign	Maintenance Cost Rollup	ASSET	ASSET	BIRT

The Report Administration application

You create, edit, and access reports through the Report Administration application.

Lesson 2 Running reports

IBM Training

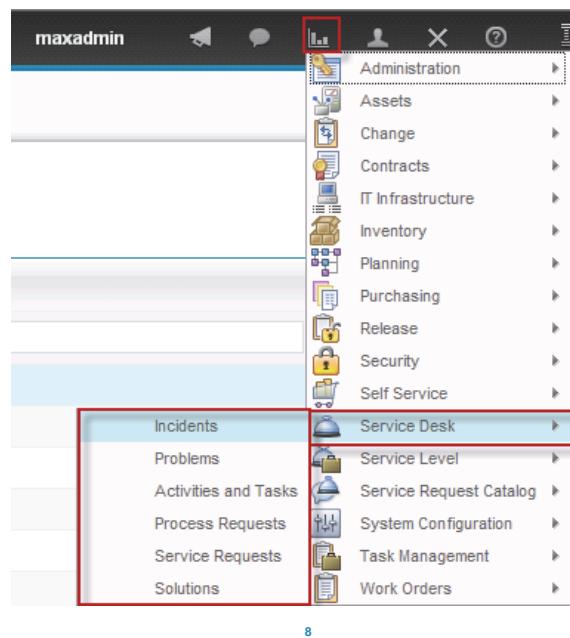
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Lesson 2 Running reports

In this lesson, you learn how to perform these tasks:

- Access reports in Control Desk
- Complete and generate report request pages
- Schedule reports to run at specific times or intervals
- Run a report immediately

Accessing reports: Reports link



Accessing reports: Reports link

Clicking the **Reports** link on the Start Center opens a list of modules that contain reports. From this list, you can select a module to view a list of reports available for that module.

Accessing reports: Navigation bar

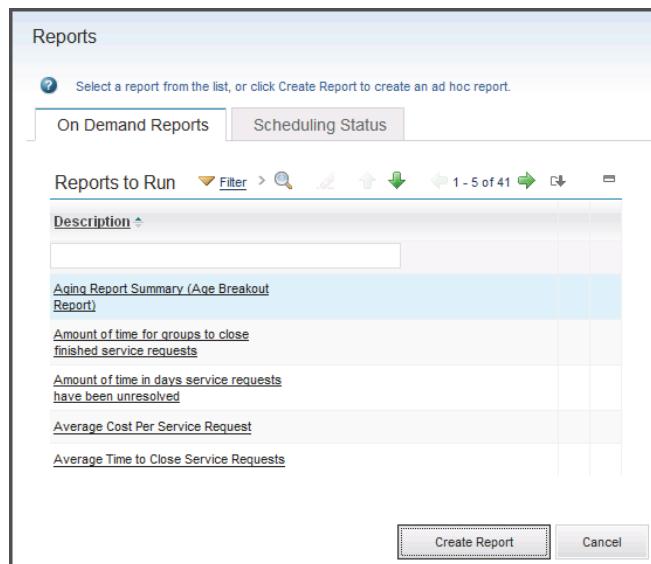
The screenshot shows the 'Service Requests' application interface. At the top, there's a navigation bar with icons for search, refresh, and other functions. Below it is a toolbar with buttons for 'Find Service Request', 'Advanced Search', 'Save Query', and 'Bookmark'. A sidebar on the left contains links like 'Go To Applications', 'Available Queries', 'Common Actions', 'More Actions', and 'Run Reports'. The 'Run Reports' link is highlighted with a red box. The main area displays a list of 'Service Requests' with a 'Summary' view. At the bottom of the main area, there are buttons for 'List', 'Map - Side by Side', and 'Map - Below'.

Accessing reports: Navigation bar

Alternatively, many applications provide a button to run a detailed report for the selected record or run a list report for a group of selected records.

You can also use the **Select Action** menu to view a list of reports available for the application.

Reports application tabs: On-demand reports



Reports application tabs: On-demand reports

Selecting a report opens the Reports window.

The **On Demand Reports** tab lists all reports in a specific area to which the agent has security privileges.

Request page

Request Page

Help Text

Parameters

Start Date:

End Date:

Service:

Service Group:

Schedule

Immediate

At this Time

Recurring

Request page

When a report is run, the Request Page window opens. Use this window to configure the selected report.

Request page: Parameters section

Parameters

Start Date::

End Date::

Service::

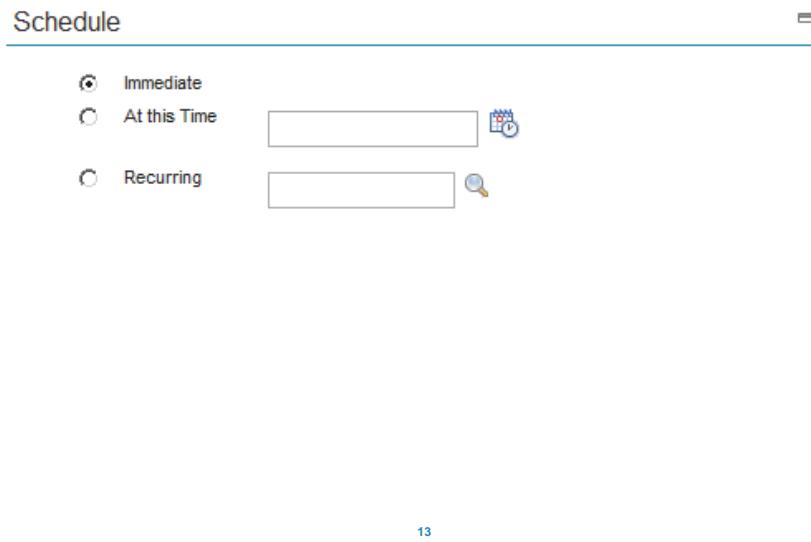
Service Group::

Request page: Parameters section



Note: If the report has parameters, any fields that are marked with an asterisk (*) must be completed

Request page: Schedule section



Request page: Schedule section

The report can be displayed either immediately, at a specified time, or on a repeated schedule.

Request page: Email section

Email

To: fred@tivoli.edu 

Subject: Report - Average service request cost

Comments:
Please review this report.

File Type: Report Delivery Format:

PDF Email with a file attachment
 XLS Email with a file URL

Request page: Email section

Scheduled reports are formatted as Portable Document Format (PDF) files and must be sent in email. The email messages can include a subject and comments.

Reports application tabs: Scheduling Status

The screenshot shows the 'Reports' application interface. At the top, there is a navigation bar with tabs: 'On Demand Reports' (selected) and 'Scheduling Status'. Below the navigation bar, a message says 'Select a report from the list, or click Create Report to create an ad hoc report.' A table titled 'Schedules You Can Edit' displays one scheduled report: 'Average Cost Per Service Request' (Type: Recurring, Next Run Time: 8/1/13 00:00:00). Below the table, there are sections for 'Schedule' and 'Email'. In the 'Schedule' section, the 'Report Name' is set to 'Average Cost Per Service Request' and the 'Type' is 'Recurring'. The 'Email' section includes fields for 'To' (fred@tivoli.edu) and 'Subject' (Average service request cost). At the bottom right are 'Create Report' and 'Cancel' buttons.

Reports application tabs: Scheduling Status

The **Scheduling Status** tab lists scheduled reports. It also shows the status of previously scheduled reports.

Lesson 3 Reports

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Lesson 3 Reports

In this lesson, you learn how to identify reports within IBM Control Desk to ensure that the proper reports are used to extract the appropriate data, depending on the required results.

Types of reports

IBM Control Desk provides the following types of Service Request Management related reports:

- Service Request
- Incident
- Problem
- Solution
- Service Level Agreement
- Survey
- Service Catalog

Service Request reports

The following is a partial list of service request-focused reports:

- Total Number of Requests
- Service Request Details
- Service Request Details (Customer)
- Service Request List
- Service Request List (Customer)
- Volume Report for Service Request Management
- Service Desk Contact, Response, and Resolution
- Disposition Report for SR Management
- Open Ticket Detail
- Open Ticket Detail (Customer)
- Service Desk Case Volume Summary
- Average Time to Close Service Requests
- Average Cost per Service Request
- Daily Morning Tickets
- Manage Top Tickets

Service Request reports

The following is a partial list of service request-focused reports:

- **Total Number of Requests:** For a specified location, displays service requests that have a status of Closed or Resolved. Tickets are sorted by internal priority and ticket ID.
- **Service Request Details:** Displays comprehensive information about a service request ticket. This report is displayed when you click the name of a service request ticket that is listed in another report.
- **Service Request List:** Lists and displays comprehensive information about Service Desk tickets, with links to the Service Desk Details report for each ticket in the list.
- **Volume Report for Service Request Management:** For a specified date range and attribute or attributes, displays a list of service request tickets for a particular agent. Also displays service requests in order by a specified parameter.
- **Service Desk Contact, Response, and Resolution:** For a specified site and date range, shows the average and maximum times for contact, response, and resolution following submission of Service Desk tickets.
- **Disposition Report for SR Management:** For a specified date range, shows details such as the following examples:
 - Total number of service requests that created a problem
 - Percent of total service requests that created a problem
 - Total problems with their status

- **Open Ticket Detail:** For a specified location, displays service requests that have a status of Closed or Resolved. Service request tickets are sorted by internal priority and ticket ID.
- **Service Desk Case Volume Summary:** For a specified range of reported dates, calculates the number of tickets by status, which is organized by owner and owner group.
- **Average Time to Close Service Requests:** For a specified date range, provides a list of closed service requests, which are grouped by internal priority. Also displays the average close time.
- **Average Cost per Service Request:** For a specified date range, lists service requests and shows the status, internal priority, impact, urgency, service, service group, and actual cost for each listed ticket.

Incident reports

The following is a partial list of incident-focused reports:

- Open Ticket Detail (and Customer version)
- Incident List
- Incident List (and Customer version)
- Service Desk Contact, Response, and Resolution
- Incident Details
- Total Number of Incidents
- Average Time to Close Incidents
- Average Cost per Incident
- Volume Report for Incidents
- Disposition Report for Incident Management

Incident reports

The following is a partial list of incident-focused reports:

- **Open Ticket Detail:** For a specified location, displays incidents that do not have a status of Closed or Resolved. Incidents are sorted by internal priority and ticket ID.
- **Incident List:** Lists and displays comprehensive information about reported incidents, with links to the Incident Details report for each incident in the list.
- **Service Desk Contact, Response, and Resolution:** For a specified site and date range, shows the average and maximum times for contact, response, and resolution following submission of incidents.
- **Incident Details:** Displays comprehensive information about an incident. This report is displayed when you click the name of an incident that is listed in another report. The other report must be open to access the Incident Details report.
- **Total Number of Incidents:** Shows the number of total incident reports. For each status and for a specified date range, also lists incidents by internal priority, from highest priority to lowest.
- **Average Time to Close Incidents:** For a specified date range, provides a list of closed incidents, which are grouped by internal priority. Also displays the average close time.
- **Average Cost Per Incident:** Lists incidents for a specified date range. Shows the status, internal priority, impact, urgency, service, service group, and actual cost for each listed incident.
- **Volume Report for Incidents:** For a specified date range and incident attribute or attributes, displays a list of incident tickets for a particular agent. Also displays incidents in order by a specified parameter.

- **Disposition Report for Incident Management:** For a specified date range, shows such information as these examples:
 - The total number of service requests that created an incident
 - The percentage of total service requests that created an incident
 - Total incidents with their status

Problem reports

The following is a partial list of problem-focused reports:

- Open Ticket Detail (and customer version)
- Problem List (and customer version)
- Service Desk Contact, Response, and Resolution
- Problem Details (and customer version)
- Total Number of Problems
- Average Time to Close Problems
- Problem Resolution
- Volume Report for Problem Management
- Disposition Report
- Incident Generation
- Incident Generation (Known Error)
- Elapsed Time for Unresolved Problems

Problem reports

The following is a partial list of problem-focused reports:

- **Open Ticket Detail:** For a specified location, displays problems that have a status of Closed or Resolved. Incidents are sorted by internal priority and ticket ID.
- **Problem List:** Lists and displays comprehensive information about reported problems, with links to the Problem Details report for each incident in the list.
- **Service Desk Contact, Response, and Resolution:** For a specified site and date range, shows the average and maximum times for contact, response, and resolution following submission of problems.
- **Problem Details:** Displays comprehensive information about a problem. This report is displayed when you click the name of a problem that is listed in another report. The other report must be open to access the Problem Details report.
- **Total Number of Problems:** Shows the number of total problem reports. Also lists problems for each status and for a specified date range by internal priority, from highest priority to lowest.
- **Average Time to Close Problems:** For a specified date range, provides a list of closed problems, which are grouped by internal priority. Also displays the average close time.
- **Problem Resolution:** For a specified date range, lists problems and shows the status, internal priority, impact, urgency, service, service group, and actual cost for each listed problem.
- **Volume Report for Problem Management:** For a specified date range and problem attribute or attributes, displays a list of problem tickets for a particular agent.

- **SLA Compliance:** Provides a table that, for a specified date range, shows the target start, target finish, actual start, and actual finish dates for reported problems. For each problem in the table, displays status, internal priority, impact, urgency, service, and service group information.
- **Disposition Report:** For a specified date range, shows such information as these examples:
 - The total number of service requests that created a problem
 - The percentage of total service requests that created a problem
 - Total problems with their status
- **Incident Generation:** Shows all problems with an unknown error. For each problem, shows the related incidents.
- **Incident Generation (Known Error):** Shows all problems with a known error. For each problem, shows the related incidents.
- **Elapsed Time for Unresolved Problems:** For a specified date range, shows elapsed time for unresolved problems.

Solution reports

The following solution-focused reports are available:

- Solution List
- Solution Details
- Solution Change History
- Service Desk Self-service Solution
- Solution Application
- Incidents and Problems with Informal Solutions
- Incidents and Problems with Formal Solutions

Solution reports

The following solution-focused reports are available:

- **Solution List:** Lists all the solutions that were recorded. Each listing includes the solution ID, description, classification, status, and self-service availability, which is organized by site.
- **Solution Details:** Intended for users who have problems with their computer, printer, network, or other devices. This report is accessed from a search and provides information so that the user can troubleshoot and resolve the problem. It includes information about problem symptoms, causes, and resolutions.
- **Self-service Solution:** Provides the total number of self-service user interactions with the Solutions database that resulted in issue resolution with no Service Desk interaction. These interactions produce higher percentages of call avoidance and reduction.
- **Incidents and Problems with Informal Solutions:** For a specified date range, lists incidents and problems with solutions that are not associated with a previously known solution. For each solution, provides information about the symptoms that led to the ticket, the cause of the symptoms, and the solution that was recorded. A pie chart displays informal solutions as a percentage of total tickets.
- **Incidents and Problems with Formal Solutions:** For a specified date range, lists incidents and problems with solutions that are associated with a previously known solution. For each solution, provides information about the symptoms that led to the ticket, the cause of the symptoms, and the solution that was recorded. A pie chart displays formal solutions as a percentage of total tickets.

Service Level Agreement reports

The following SLA-focused reports are available:

- SLA Details
- Service Level Exception
- SLA List
- Service Target Compliance
- Service Desk Contact, Response, and Resolution

Service Level Agreement reports

The following SLA-focused reports are available:

- **SLA Details:** Displays comprehensive information about an SLA. This report is displayed when the name of an SLA that is listed in another report is clicked. The other report must be open to access the SLA Details report.
- **Service Level Exception:** For a specified date range, displays all tickets that did not meet the SLA commitments. Also indicates whether the violations are against the contract, the response, or the resolution.
- **SLA List:** Lists and displays comprehensive information about SLAs, with links to the SLA Details report for each ticket in the list.
- **Service Target Compliance:** For a specified date range, site, service group, and service, calculates the percentage of SLA compliance for resolved and closed tickets. Groups tickets by service group and service and reports at the service level the compliance percentage for contact, response, and resolution. Only tickets that have an applied SLA are counted for this report.
- **Service Desk Contact, Response, and Resolution:** For a specified site and date range, shows the average and maximum times for contact, response, and resolution following submission of tickets that involve SLAs.

Survey reports

The following survey-focused reports are available:

- Surveys Sent and Received
- Service Request Survey
- Incident Survey
- Problem Survey

Survey reports

The following survey-focused reports are available:

- **Surveys Sent and Received:** Shows the number of surveys that were sent and received for a specified parameter.
- **Service Request Survey:** Shows the results of the Service Request survey, a predefined survey that is provided by the Survey application.
- **Incident Survey:** Shows the results of the Incident survey, a predefined survey that is provided with the Survey application.
- **Problem Survey:** Shows the results of the Problem survey, a predefined survey that is provided by the Survey application.

Service Catalog reports

The following Service Catalog-focused reports are available:

- Offerings List
- Offering Detail
- Offerings Not Ordered
- Offerings Order Frequency
- Catalog Request List
- Catalog Request Detail
- Catalog Request Performance
- Catalog Orders Awaiting Approval More than 5 Days
- Service Requests Created By Catalog Orders

Service Catalog reports

The following Service Catalog-focused reports are available:

- **Offerings List:** Lists offerings.
- **Offering Detail:** Shows details of an offering.
- **Offerings Not Ordered:** Offerings that have not been ordered within a specified time period.
- **Offerings Order Frequency:** Shows number of times that an offering has been ordered.
- **Catalog Request List:** Lists catalog requests.
- **Catalog Request Detail:** Shows details of a catalog request.
- **Catalog Request Delivery Performance:** Shows delivery times for fulfilling requested services. Compares approval date to the close date.
- **Catalog Request Awaiting Approval More than 5 Days:** Shows catalog requests that are in Approval (APPR) status for more than five days.
- **Service Requests Created By Catalog Orders:** Shows which service requests are created through Service Catalog orders.

Review questions

1. What is the goal of a report?
2. Name three of the five report formats.
3. In what manner and format are scheduled reports sent?
4. How might a report be run from within an application?

Review answers

1. What is the goal of a report?

To provide formatted and concise information that provides management with meaningful data that helps them to:

Make informed business decisions

Assess Service Desk performance within the ITIL framework and processes

2. Name three of the five report formats.

Lists

Detailed analyses

Expanded views

Tables

Graphical

3. In what manner and format are scheduled reports sent?

Email and PDF

4. How might a report be run from within an application?

Using the More Actions menu or the Reports button

Student exercises



Student exercises

Summary

- Define reporting options
- Run predefined reports

Summary



IBM Training



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