

# **HP OpenView Service Desk 4.5**

## **User's Guide**

**First Edition**



**i n v e n t**

**Manufacturing Part Number: N/A**

**July 2002**

---

## Legal Notices

Hewlett-Packard makes no warranty of any kind with regard to this manual, including, but not limited to, the implied warranties of merchantability and fitness for a particular purpose. Hewlett-Packard shall not be held liable for errors contained herein or direct, indirect, special, incidental or consequential damages in connection with the furnishing, performance, or use of this material.

**Restricted Rights Legend.** Use, duplication or disclosure by the U.S. Government is subject to restrictions as set forth in subparagraph (c)(1)(ii) of the Rights in Technical Data and Computer Software clause in DFARS 252.227-7013.

Hewlett-Packard Company  
3000 Hanover Street  
Palo Alto, CA 94304 U.S.A.

Rights for non-DOD U.S. Government Departments and Agencies are as set forth in FAR 52.227-19 (c)(1,2).

**Copyright Notice.** © Copyright 2001, 2002 Hewlett-Packard Company

The nomenclature of each version of this software (and manuals therefore) has been devised for commercially convenient reasons, and is not intended to denote the degree of originality of any version of the software with respect to any other version. The extent of protection afforded by, and duration of copyright is to be determined entirely independently of this nomenclature.

### Trademark Notices

Adobe® and Acrobat® are trademarks of Adobe Systems Incorporated.

Java™ is a U.S. trademark of Sun Microsystems, Inc.

Microsoft® is a U.S. registered trademark of Microsoft Corporation.

Netscape, Netscape Commerce Server, Netscape Communications, Netscape Communications Server, the "N" logo, Netscape Navigator, the Netscape Navigator Included logo, and Netscape Proxy Server are U.S. trademarks of Netscape Communications Corporation.

UNIX® is a registered trademark of the Open Group.

Windows NT® is a U.S. registered trademark of Microsoft Corporation.

**Windows® and MS Windows® are U.S. registered trademarks of Microsoft Corporation.**



**1. Introducing Service Desk**

What Is Service Desk? . . . . .	28
Starting Service Desk . . . . .	29
Navigating Through Service Desk . . . . .	31
The Service Desk Console . . . . .	31
How Service Desk Works . . . . .	35
Functional Structure of Service Desk . . . . .	35
Focus on Solutions. . . . .	35
Technical Structure of Service Desk . . . . .	36
Ensuring a High Quality Application . . . . .	36
Ensuring High Usage Flexibility . . . . .	36

**2. Product Concepts**

General Concepts . . . . .	38
ITIL . . . . .	38
How Service Desk Uses ITIL. . . . .	39
Understanding Service Desk Processes. . . . .	39
Service Desk Roles . . . . .	42
Service Users. . . . .	42
Customers . . . . .	43
Contact Persons . . . . .	43
Specialists . . . . .	44
Organizations . . . . .	44
Configuration Managers. . . . .	44
Change Managers. . . . .	45
Problem Managers . . . . .	45
Service Level Managers . . . . .	46
Person and Organization Managers . . . . .	47
System and Application Administrators . . . . .	47

**3. Service Desk Features**

Templates . . . . .	50
Approval . . . . .	52
Introducing Approval . . . . .	52
Approval Sheets . . . . .	54
Approval Roles. . . . .	56
Scenario: Approving a Change Request. . . . .	56
Managing Work . . . . .	59

---

# Contents

Service Today .....	59
Work Orders .....	59
Assignment .....	60
Life Cycles and Status Codes .....	61
Folders and Categories .....	63
Folders .....	63
Categories .....	64
History Lines .....	65
The International Support Desk .....	66
Time Zones .....	66
Localization .....	66
Service Desk Flexibility .....	67
Administrator Console .....	67
Service Desk Console .....	69
Introducing Service Pages .....	71
Accessing Service Pages .....	71
Approval via the Web .....	72

## 4. Basic Tasks

Viewing Information .....	74
Using Table Views .....	74
Using Chart Views .....	76
Using Explorer Views .....	78
Using Card Views .....	79
Using Tree Views .....	79
Using Project Views .....	80
Using the Actions Menu .....	81
Using Advanced Find .....	82
Scenario: Searching for Similar Service Calls .....	84

## 5. Customer Tasks

Scenario: Registering a Service Call .....	90
What is the Solution? .....	90
Administering Service Calls .....	91
Registering Service Calls .....	91
Using Service Pages (SP) .....	91

## 6. Help Desk Personnel Tasks

Scenario: Help Desk Operator Intervention . . . . .	94
Overview of Help Desk Operator Tasks . . . . .	95
Administering Service Calls . . . . .	96
Registering Service Calls . . . . .	96
Running a Checklist . . . . .	98
Viewing Service Calls . . . . .	98
Updating Service Calls . . . . .	99
Creating Subcontract Service Calls . . . . .	99
Closing Service Calls . . . . .	99
Scenario: Service Call Creation . . . . .	101
Relating Service Desk Processes . . . . .	107
Identifying Related Service Desk Roles . . . . .	108

## **7. Configuration Manager Tasks**

Administering Configuration Items . . . . .	110
Categorizing Configuration Items . . . . .	111
Registering Configuration Items . . . . .	112
Using the New Configuration Item Form . . . . .	112
Using the Generate CI Wizard . . . . .	113
Viewing Configuration Items . . . . .	114
Updating Configuration Items . . . . .	115
Specifying Periodic Outages . . . . .	116
Deleting Configuration Items . . . . .	117
Relating Configuration Items . . . . .	118
Scenario: Registering a Batch of PCs . . . . .	119
Identifying Related Service Desk Roles . . . . .	124

## **8. Specialist Tasks**

Administering Specialist Actions . . . . .	126
Accepting Service Calls . . . . .	126
Viewing Service Calls . . . . .	127
Updating Service Calls . . . . .	127
Closing Service Calls . . . . .	128
Creating Subcontract Service Calls . . . . .	128
Scenario: Creating a Subcontract Service Call Involving an Operations Management Service Provider . . . . .	128
Scenario: Creating a Subcontract Service Call Involving a Business Service Provider . . . . .	129

---

# Contents

Relating Service Desk Items . . . . .	130
Scenario: Investigating a Problem . . . . .	131
Identifying Related Service Desk Roles . . . . .	136

## 9. Change Manager Tasks

Administering Changes . . . . .	138
Approving Changes . . . . .	138
Viewing Changes . . . . .	139
Updating Configuration Items . . . . .	139
Closing Change Requests . . . . .	139
Planning Occasional Outages . . . . .	143
Passing Outage Information to OpenView Operations . . . . .	145
Updating CIs According to Work Orders . . . . .	146
Specifying Planned Attribute Values . . . . .	146
Specifying the Change Manager . . . . .	148
Checking if a CI is Related to Other Work Orders . . . . .	148
Scenario: Planning a Change . . . . .	150
Identifying Related Service Desk Roles . . . . .	152

## 10. Problem Manager Tasks

Administering Problem Manager Tasks . . . . .	154
Registering Problems . . . . .	155
Relating Service Desk Items . . . . .	157
Scenario: Registering a Problem . . . . .	159
Scenario: Initiating a Change . . . . .	162
Identifying Related Service Desk Roles . . . . .	164

## 11. Service Level Manager Tasks

Establishing Service Structures . . . . .	166
Service Types . . . . .	166
Business Services . . . . .	167
Operations Management Services . . . . .	167
Underpinning Services . . . . .	167
Service Relations . . . . .	167
Parent–Child Relations . . . . .	168
Using–Used Relations . . . . .	168
Managing–Managed Relations . . . . .	168
Supporting–Supported Relations . . . . .	168



Underpinning–Underpinned Relations . . . . .	168
Valid Structural Relations for Services and CIs . . . . .	169
Scenario: Establishing a Service Structure . . . . .	169
Automatic Retrieval of Service Levels into Incidents . . . . .	173
Incidents Related to a Service . . . . .	175
Incidents Related to a Configuration Item . . . . .	175
Including Operations Management and Underpinning Services in Service Structures 176	
Creating Effective Service Level Agreements . . . . .	177
Defining Hours for Service Level Agreements . . . . .	178
Developing Service Level Agreements . . . . .	179
SLA Elements . . . . .	180
Evaluating Service Level Agreements . . . . .	181
Internal and External Evaluations . . . . .	181
Types of Performance Evaluations . . . . .	182
Service Availability . . . . .	182
Analyzed Performance . . . . .	182
Planning Performance . . . . .	182
Incorporating Service Performance Safety Margins . . . . .	183
Integrating with HP OpenView Internet Services (OVIS) . . . . .	184
Identifying Related Service Desk Roles . . . . .	185

## **12. Persons and Organization Administrator Tasks**

Administering Personnel and Organizations . . . . .	188
Categorizing Persons and Organization Entries . . . . .	189
Registering Persons and Organizations . . . . .	190
Creating Person Entries . . . . .	190
Creating Organization Entries . . . . .	192
Creating Workgroup Entries . . . . .	193

## **13. Service Desk Administrator Tasks**

Performing Administrator Tasks . . . . .	196
Creating Templates and Actions . . . . .	197
Archiving Information . . . . .	198
Creating Reports Using Third-Party Tools . . . . .	200
Overview of Reporting . . . . .	200

---

# Contents

Figure 1-1. Service Desk Database Connection Wizard. . . . .	29
Figure 1-2. Service Desk Logon Dialog Box . . . . .	30
Figure 1-3. The Service Desk Console. . . . .	31
Figure 1-4. The Title Bar . . . . .	32
Figure 1-5. The Toolbars . . . . .	32
Figure 1-6. The Shortcut Bar. . . . .	32
Figure 1-7. Data View . . . . .	33
Figure 1-8. Change Request Displayed in a Form . . . . .	34
Figure 3-1. An Example Template. . . . .	51
Figure 3-2. Viewing Approval Tasks . . . . .	53
Figure 3-3. Approval Sheet . . . . .	54
Figure 3-4. Initiating the Approval Process . . . . .	57
Figure 3-5. Voting. . . . .	58
Figure 3-6. Granting Approval for the Change . . . . .	58
Figure 3-7. Administrator Console View. . . . .	67
Figure 3-8. Service Pages Process . . . . .	72
Figure 4-1. Service Calls: Table View . . . . .	75
Figure 4-2. Sorting Information in Table Views. . . . .	75
Figure 4-3. Grouping Information in Table Views . . . . .	76
Figure 4-4. Service Calls: Chart View. . . . .	77
Figure 4-5. Explorer View Panes. . . . .	78
Figure 4-6. Card View: Personnel . . . . .	79
Figure 4-7. Tree View: Organization Structure . . . . .	80
Figure 4-8. Project View: Work Orders in a Change Item . . . . .	80
Figure 4-9. Service Call View: Actions Menu . . . . .	81
Figure 4-10. Service Call View: Advanced Find . . . . .	82
Figure 4-11. Advanced Find: More Choices . . . . .	83
Figure 4-12. Advanced Find: Advanced . . . . .	84
Figure 4-13. Initiating the Search. . . . .	85
Figure 4-14. Adding a Phrase to the Value Field . . . . .	86
Figure 4-15. Running the Search and Displaying the Result . . . . .	87
Figure 4-16. Pasting Fields into the New Service Call . . . . .	88
Figure 6-1. Service Today View for the Help Desk Workgroup . . . . .	95
Figure 6-2. New Service Call. . . . .	97
Figure 6-3. Service Call Deletion. . . . .	100
Figure 6-4. Service Call Closure . . . . .	101

---

## Figures

Figure 6-5. New Service Call Using Default Form and Template . . . . .	102
Figure 6-6. Identifying the Caller . . . . .	102
Figure 6-7. Registering Service Details . . . . .	103
Figure 6-8. Describing the Problem . . . . .	104
Figure 6-9. Setting the Impact . . . . .	105
Figure 6-10. Request to Restart the Web Server . . . . .	106
Figure 6-11. Service Call Relation. . . . .	107
Figure 7-1. CMDB Console . . . . .	111
Figure 7-2. New Configuration Item. . . . .	112
Figure 7-3. CI Subject to Periodic Outage . . . . .	116
Figure 7-4. Launching the Generate CI Wizard. . . . .	119
Figure 7-5. Selecting the correct template . . . . .	120
Figure 7-6. Modifying the template. . . . .	120
Figure 7-7. Specifying the parent CI. . . . .	121
Figure 7-8. Specifying the child CIs . . . . .	121
Figure 7-9. Specifying the search codes . . . . .	122
Figure 7-10. Search code warning . . . . .	122
Figure 7-11. Viewing the CI creation report . . . . .	123
Figure 7-12. New CI hierarchy . . . . .	123
Figure 8-1. Service Call Relation Tab . . . . .	131
Figure 8-2. Viewing the work order. . . . .	132
Figure 8-3. Viewing Details of the Incident . . . . .	133
Figure 8-4. Viewing Details of the Incident . . . . .	134
Figure 8-5. Attaching the Report to the Work Order . . . . .	135
Figure 9-1. New Change Form . . . . .	138
Figure 9-2. Change Request Deletion . . . . .	141
Figure 9-3. Change Request: Duplicate Closure . . . . .	142
Figure 9-4. Work Order Involving Occasional Outage . . . . .	144
Figure 9-5. Planning Suggestion . . . . .	145
Figure 9-6. Specifying Planned Attribute Values. . . . .	147
Figure 9-7. Specifying the Work Order Status that Triggers the CI Update . . . . .	148
Figure 9-8. Listing Other Work Orders Affecting a CI . . . . .	149
Figure 9-9. Creating Work Orders. . . . .	150
Figure 9-10. Viewing Start and Finish Dates Graphically . . . . .	151
Figure 10-1. Problem Data View . . . . .	155
Figure 10-2. Problem: New Request . . . . .	156

Figure 10-3. Problem Request: Service Call Relations .....	158
Figure 10-4. Copying an Incident into a Problem .....	159
Figure 10-5. Specifying the Relation Type .....	160
Figure 10-6. Relating the Problem to an Incident .....	160
Figure 10-7. Assigning the Problem to a Specialist .....	161
Figure 10-8. Adding a New Change Request as a Problem Solution Proposal. ....	162
Figure 10-9. Requesting an Approval Process for the Change .....	163
Figure 11-1. Business Service Composition .....	170
Figure 11-2. Service Usage Relations .....	170
Figure 11-3. Configuration Item Usage Relations .....	171
Figure 11-4. Operations Management and Underpinning Service Relations. ....	171
Figure 11-5. The Complete Service Structure .....	172
Figure 11-6. Automatic Insertion of Service Level in Incidents .....	174
Figure 11-7. Service Level Agreement .....	177
Figure 11-8. Hours of Service .....	178
Figure 12-1. Organization Group View .....	188
Figure 12-2. New Person Entry .....	191
Figure 12-3. New Organization Entry .....	193
Figure 12-4. New Workgroup .....	194
Figure 12-5. Workgroup Calendar .....	194
Figure 13-1. Reporting Process .....	201

---

# Figures

---

## Preface

This guide introduces you to the key concepts behind HP OpenView Service Desk. Scenarios are described to provide implementation examples. This product will be referred to as Service Desk throughout the remainder of this guide.

This guide does not include detailed instructions to perform specific tasks with Service Desk. For detailed instructions, refer to the online help or one of the other Service Desk guides. See “Related Publications” on page 18 for an overview of the documentation available for Service Desk.

This guide is for anyone requiring a general overview of the concepts behind Service Desk. This guide assumes the reader has basic knowledge of computer systems, IT operations, networks and applications.

This book is organized as follows:

- Chapter 1, “Introducing Service Desk,” on page 27 describes the look of HP OpenView Service Desk. It also provides an overview on the functional and technical structure of Service Desk.
- Chapter 2, “Product Concepts,” on page 37 describes the concepts behind Service Desk.
- Chapter 3, “Service Desk Features,” on page 49 introduces key features available in Service Desk.
- Chapter 4, “Basic Tasks,” on page 73 describes tasks basic to your IT infrastructure personnel.
- Chapter 5, “Customer Tasks,” on page 89 describes the user role and associated tasks in Service Desk.
- Chapter 6, “Help Desk Personnel Tasks,” on page 93 describes the contact person role and associated tasks in Service Desk.
- Chapter 7, “Configuration Manager Tasks,” on page 109 describes the configuration manager role and associated tasks in Service Desk.
- Chapter 8, “Specialist Tasks,” on page 125 describes the role of the Specialist and associated tasks in Service Desk.
- Chapter 9, “Change Manager Tasks,” on page 137 describes the role of the change manager and associated tasks in Service Desk.

- Chapter 10, “Problem Manager Tasks,” on page 153 describes the role of the problem manager and associated tasks in Service Desk.
- Chapter 11, “Service Level Manager Tasks,” on page 165 provides hints and tips on defining service levels for the service level manager role.
- Chapter 12, “Persons and Organization Administrator Tasks,” on page 187 describes the role and responsibilities of the human resources administrator.
- Chapter 13, “Service Desk Administrator Tasks,” on page 195 describes the role of the application and system administrators and associated tasks in Service Desk.



## Revision History

When an edition of a manual is issued with a software release, it has been reviewed and tested and is therefore considered correct at the date of publication. However, errors in the software or documentation that were unknown at the time of release, or important new developments, may necessitate the release of a service pack that includes revised documentation. Revised documentation may also be published on the Internet, see “We Welcome Your Comments!” in this preface for the URL.

A revised edition will display change bars in the left-hand margin to indicate revised text. These change bars will only mark the text that has been edited or inserted since the previous edition or revised edition.

When a revised edition of this document is published, the latest revised edition nullifies all previous editions.

**Table 1**

### **Revision History**

<b>Edition and Revision Number</b>	<b>Issue Date</b>	<b>Product Release</b>
First Edition	July 2002	Service Desk 4.5

## Related Publications

This section helps you find information that is related to the information in this guide. It gives an overview of the Service Desk documentation and lists other publications you may need to refer to when using this guide.

### The Service Desk Documentation

Service Desk provides a selection of books and online help to assist you in using Service Desk and improve your understanding of the underlying concepts. This section illustrates what information is available and where you can find it.

---

**NOTE**

This section lists the publications provided with Service Desk 4.5. Updates of publications and additional publications may be provided in later service packs. For an overview of the documentation provided in service packs, please refer to the readme file of the latest service pack. The service packs and the latest versions of publications are available on the Internet. See the section “We Welcome Your Comments!” in this preface for the URLs.

- 
- The `Readme.htm` files on the Service Desk CD-ROMs contain information that will help you get started with Service Desk. The Readme files also contain any last-minute information that became available after the other documentation went to manufacturing.

The Service Desk 4.5 server is coded in Pure Java and is platform independent. The installation software for each platform varies. Service Desk is therefore distributed on three CD-ROMs, one each for Microsoft Windows (2000 and NT4), HP-UX, and Sun Solaris. A different readme file is available on each CD-ROM.

- The *HP OpenView Service Desk: Release Notes* give a description of the features that Service Desk provides. In addition, they give information that helps you:
  - compare the current software’s features with those available in previous versions of the software;
  - solve known problems.

The Release Notes are available as a PDF file on the HP OpenView Service Desk 4.5 for Windows CD-ROM . The file name is Release\_Notes.pdf.

- The *HP OpenView Service Desk: User's Guide* introduces you to the key concepts behind Service Desk. It gives an overview of what you can do with Service Desk and explains typical tasks of different types of Service Desk users. Scenario descriptions are provided as examples of how the described features could be implemented.

The User's Guide is available as a PDF file on the HP OpenView Service Desk 4.5 for Windows CD-ROM. The file name is User's\_Guide.pdf.

- The *HP OpenView Service Desk: Supported Platforms List* contains information that helps you determine software requirements. It lists the software versions supported by Hewlett-Packard for Service Desk 4.5.

The Supported Platforms List is available as a PDF file on the HP OpenView Service Desk 4.5 for Windows CD-ROM. The file name is Supported\_Platforms\_List.pdf.

- The *HP OpenView Service Desk: Installation Guide* covers all aspects of installing Service Desk.

The Installation Guide is available as a PDF file on the HP OpenView Service Desk 4.5 for Windows CD-ROM. The file name is Installation\_Guide.pdf.

- The *HP OpenView Service Desk: Administrator's Guide* provides information that helps application administrators to set up and maintain the Service Desk application server for client usability.

The Administrator's Guide is available as a PDF file on the HP OpenView Service Desk 4.5 for Windows CD-ROM. The file name is Administrator's\_Guide.pdf.

- The *HP OpenView Service Desk: Data Exchange Administrator's Guide* explains the underlying concepts of the data exchange process and gives instructions on exporting data from external applications and importing it into Service Desk. The data exchange process includes importing single service events and batches of data.

The Data Exchange Administrator's Guide is available as a PDF file on the HP OpenView Service Desk 4.5 for Windows CD-ROM. The file name is Data\_Exchange.pdf.

- The *HP OpenView Operations Integration Administrator's Guide* explains the integration between Service Desk and HP OpenView Operations for Windows and UNIX®. This guide covers the installation and configuration of the integration and explains how to perform the various tasks available with the integration.

The OpenView Operations Integration Administrator's Guide is available as a PDF file on the HP OpenView Service Desk 4.5 for Windows CD-ROM. The file name is `OVO_Integration_AG.pdf`.

- The *HP OpenView Service Desk: Migration Guide* provides a detailed overview of the migration from ITSM to Service Desk, to include an analysis of the differences in the two applications. Detailed instructions in this guide lead through the installation, configuration and other tasks required for a successful migration.

The Migration Guide is available as a PDF file on the HP OpenView Service Desk 4.5 for Windows CD-ROM. The file name is `Migration_Guide.pdf`.

- The *HP OpenView Service Desk: Web API Programmer's Guide* contains information that will help you create customized integrations with Service Desk using the Service Desk Web API. This API is particularly suited for developing Web applications.

The Web API Programmer's Guide is available as a PDF file on the HP OpenView Service Desk 4.5 for Windows CD-ROM. The file name is `Web_API_pg.pdf`.

- The *HP OpenView Service Desk: Data Dictionary* contains helpful information about the structure of the application.

The Data Dictionary is available as an HTML file on the HP OpenView Service Desk 4.5 for Windows CD-ROM. The file name is `Data_Dictionary.htm`.

- The *HP OpenView Service Desk 4.5 Computer Based Training (CBT)* CD-ROM is intended to assist you in learning about the functionality of HP OpenView Service Desk 4.5 from both a user and a system administrator perspective. The CD-ROM contains demonstration videos and accompanying texts that explain and show how to perform a wide variety of tasks within the application. The CBT also explains the basic concepts of the Service Desk application.

The *HP OpenView Service Desk 4.5 Computer Based Training (CBT)* CD-ROM will be shipped automatically with the regular Service Desk software. The CBT will be available for shipment shortly after the release of the Service Desk software.

- The online help is an extensive information system providing:
  - procedural information to help you perform tasks, whether you are a novice or an experienced user;
  - background and overview information to help you improve your understanding of the underlying concepts and structure of Service Desk;
  - information about error messages that may appear when working with Service Desk, together with information on solving these errors;
  - help on help to learn more about the online help.

The online help is automatically installed as part of the Service Desk application and can be invoked from within Service Desk. See the following section entitled “Using the Online Help” for more information.



### **Reading PDF Files**

You can view and print the PDF files with Adobe® Acrobat® Reader. This software is included on the HP OpenView Service Desk 4.5 CD-ROM. For installation instructions, see the `readme.htm` file on the CD-ROM.

The latest version of Adobe Acrobat Reader is also freely available from Adobe’s Internet site at <http://www.adobe.com>.

### **Using the Online Help**

You can invoke help from within Service Desk in the following ways:

- To get help for the window or dialog box you are working in, do one of the following:
  - Press **F1**.
  - Click the help toolbar button .
  - Choose **Help** from the **Help** menu.
  - Click the help command button  in a dialog box.

- To search for help on a specific subject using the table of contents or the index of the help system: choose Help Contents & Index from the Help menu.



When you are in the help viewer, you can find help on how to use the help system itself by clicking the Help toolbar button:




Service Desk also provides tooltips and “What’s This?” help for screen items like buttons, boxes, and menus.

A *tooltip* is a short description of a screen item. To view a tooltip, rest the mouse pointer on the screen item. The tooltip will appear at the position of the mouse pointer.

“*What’s This?*” help is a brief explanation of how to use a screen item. “What’s This?” help generally gives more information than tooltips. To view “What’s This?” help:

1. First activate the “What’s This?” mouse pointer in one of the following ways:
  - Press **Shift+F1**.
  - Click the “What’s This?” toolbar button .
  - Choose What ‘s This? from the Help menu.
  - In dialog boxes, click the question mark button  in the title bar.

The mouse pointer changes to a “What’s This?” mouse pointer .

2. Then click the screen item for which you want information. The “What’s This?” help information appears in a pop-up window.

To close the pop-up window, click anywhere on the screen or press any key on your keyboard.

## **Other Related Publications**

In addition to the Service Desk documentation mentioned above, you may want to refer to the following publications when using this guide:

ITIL Online Glossary at [www.itil.co.uk/glossary.htm](http://www.itil.co.uk/glossary.htm)

## Typographic Conventions

The table below illustrates the typographic conventions used in this guide.

Font	What the Font Represents	Example
<i>Italic</i>	References to book titles  Emphasized text	See also the <i>HP OpenView Service Desk: Installation Guide</i> .  <i>Do not delete</i> the System user.
<b>Bold</b>	First-time use of a term that is explained in the glossary	The <b>service call</b> is the basis for incident registration.
Courier	Menu names  Menu commands  Button names  File names  Computer-generated output, such as command lines and program listings	You can adjust the data view with the commands in the View menu.  Choose Save from the menu.  Click Add to open the Add Service Call dialog box.  To start the installation, double-click <code>setup.htm</code> .  If the system displays the text <pre>C:\&gt;dir a:</pre> The device is not ready then check if the disk is placed in the disk drive.
<b>Courier bold</b>	User input: text that you must enter in a box or after a command line	If the service call must be solved within 30 minutes, enter 30.

<b>Font</b>	<b>What the Font Represents</b>	<b>Example</b>
<i>Courier italic</i>	Replaceable text: text that you must replace by the text that is appropriate for your situation	Go to the folder <i>X:\Setup</i> , where <i>X</i> is your CD-ROM drive.
<b>Helvetica bold</b>	Keyboard keys  A plus sign (+) means you must press the first key ( <b>Ctrl</b> in the example), hold it, and then press the second key ( <b>F1</b> in the example).	Press <b>Ctrl+F1</b> .



## **We Welcome Your Comments!**

Your comments and suggestions help us understand your needs, and better meet them. We are interested in what you think of this manual and invite you to alert us to problems or suggest improvements. You can submit your comments through the Internet, using the HP OpenView Documentation Comments Web site at the following URL:

[http://ovweb.external.hp.com/lpe/comm\\_serv](http://ovweb.external.hp.com/lpe/comm_serv)

If you encounter errors that impair your ability to use the product, please contact the HP Response Center or your support representative.

The latest versions of OpenView product manuals, including Service Desk manuals, are available on the HP OpenView Manuals Web site at the following URL:

[http://ovweb.external.hp.com/lpe/doc\\_serv](http://ovweb.external.hp.com/lpe/doc_serv)

Software patches and documentation updates that occur after a product release, will be available on the HP OpenView Software Patches Web site at the following URL:

<http://support.openview.hp.com/cpe/patches>



---

# **1** **Introducing Service Desk**

This chapter provides a general overview of Service Desk. It also describes the technical and functional structure, as well as how to navigate through Service Desk.

## What Is Service Desk?

HP OpenView Service Desk automates IT infrastructure management processes to control the quality and delivery of business critical IT services. The supported IT management processes can be managed against agreed-upon service levels. The service level is negotiated and agreed upon by the customers of the service.

Service Desk helps you:

- Increase the quality and quantity of delivered services
- Decrease the time required to resolve incidents
- Prevent incidents from occurring or reoccurring
- Reduce the risk associated with an evolving IT infrastructure
- Manage processes involved in delivering high-quality service levels

Service Desk is a structured, process-oriented application that supplies tools for managing, reporting, and improving all IT management processes. It can be modified to fit into the procedures of any IT department. It can also be integrated with a variety of tools to further extend the capabilities of your IT department.

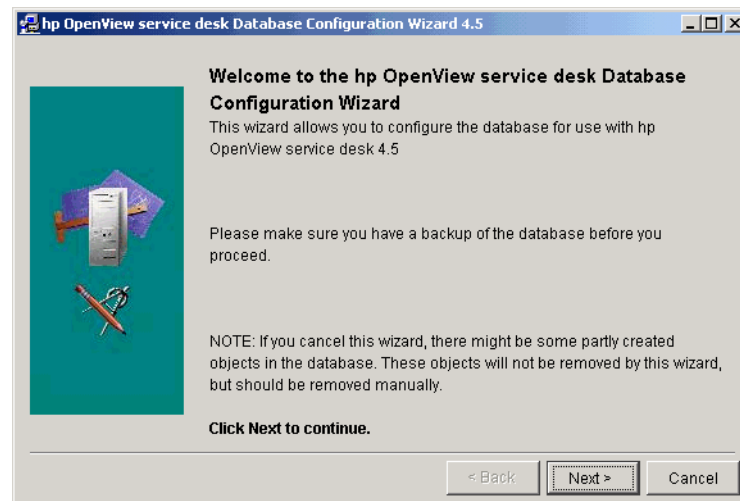
---

## Starting Service Desk

When you start Service Desk, the application tries to connect with the Service Desk application server with information stored on your hard disk. If Service Desk cannot find the information, the Service Desk Database Connection Wizard guides you through the process of creating a database connection:

**Figure 1-1**

### Service Desk Database Connection Wizard



If database connection information is found on your hard drive, Service Desk automatically connects to the application server and displays the Service Desk console. If database connection information is on your hard drive but is incorrect, a Logon dialog box is displayed:

**Figure 1-2**      **Service Desk Logon Dialog Box**



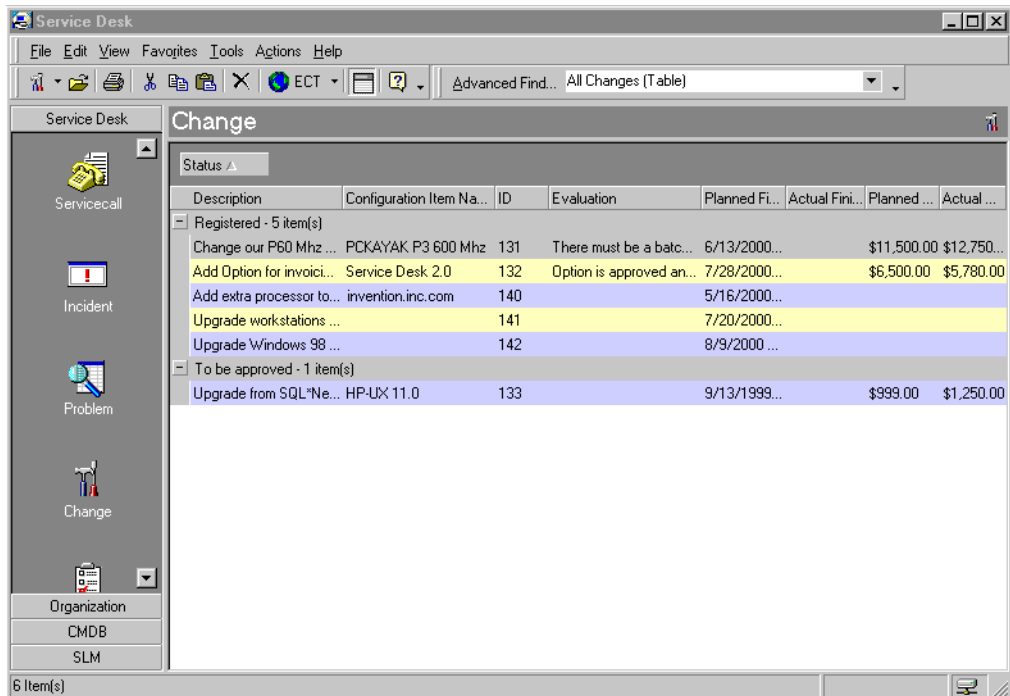
Based on how the system administrator configures Service Desk, you may be required to log on. When starting Service Desk, a logon screen is displayed requesting your name, password and the name of the computer where the Service Desk application server is located, as illustrated above in Figure 1-2.

## Navigating Through Service Desk

### The Service Desk Console

The starting point for most tasks within Service Desk is the **console**:

**Figure 1-3** The Service Desk Console



The console presents the application visually. The information displayed is a visual representation of data or information stored in a database. The console is the primary tool to enter and manipulate information in the Service Desk database.

At the top of the console, you will see the **title bar**:

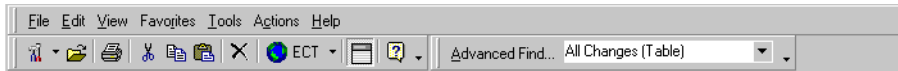
**Figure 1-4**                    **The Title Bar**



The title bar states “Service Desk”. At the right side of the title bar, you will see the standard Windows® buttons for closing and resizing the console window:

Below the title bar, you will see one or more **toolbars**:

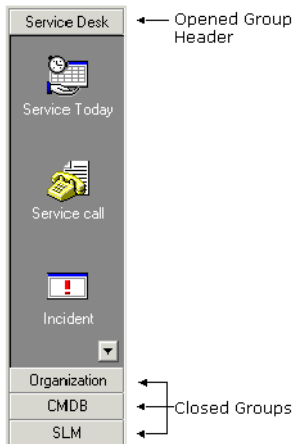
**Figure 1-5**                    **The Toolbars**



You use toolbars to start commands. There are two distinct types of toolbar: the **menu bar** and the **button bar**. In the menu bar, commands are represented by their names and are grouped in menus. In the button bar, the commands are represented by an icon. The commands started from the toolbar may vary from changing the way the information in the database is shown to exiting the program. Toolbars can be customized. The names of the commands and their location can be modified to suit the needs of your organization.

Below the toolbar, you will see the data view and the **shortcut bar**. The shortcut bar is located at the left hand side of the console:

**Figure 1-6**                    **The Shortcut Bar**



Click an icon in the shortcut bar to show a different data view. Each shortcut icon represents a different data item or a link to an external application such as Microsoft Word®.



One or more shortcuts can be organized into groups. A **group** is a collection of shortcut icons. You can add, modify or delete groups to customize Service Desk to your business needs. Click a group header to open the group.

The **data view** displays an overview of information. For information you manage, the data view provides an overview of records in Service Desk. For example, the data view in the figure below displays an overview of all the change requests in a certain network:

**Figure 1-7**

**Data View**

Description	Configuration Item Na...	ID	Evaluation	Planned Fi...	Actual Fini...	Planned ...	Actual ...
Registered - 5 item(s)							
Change our P60 Mhz ...	PCKAYAK P3 600 Mhz	131	There must be a batc...	6/13/2000...		\$11,500.00	\$12,750...
Add Option for invoici...	Service Desk 2.0	132	Option is approved an...	7/28/2000...		\$6,500.00	\$5,780.00
Add extra processor to...	openview3.rose.hp.com	140		5/16/2000...			
Upgrade workstations ...		141		7/20/2000...			
Upgrade Windows 98 ...		142		8/9/2000 ...			
To be approved - 1 item(s)							
Upgrade from SQL*Ne...	HP-UX 11.0	133		9/13/1999...		\$999.00	\$1,250.00

Service Desk can display data view information in several different ways:

- Table views display different records below each other in a list. For each record, the values of preselected attributes are displayed next to each other.
- Tree views display information in a hierarchical structure.
- Chart views display information graphically in a number of different formats, including line charts, pie charts, and bar charts.
- Card views display information as individual cards.

- Explorer views display information in a number of panes. The main information is displayed in the base pane. A navigation pane provides a method of navigating to the main information. Leaf panes display detailed information about an item highlighted in the base pane.

For more information on using views, see See “Viewing Information” on page 74.

You can edit a record by double-clicking the item or line in the data view. For example, if you double-click the change request with ID 140 listed in Figure 1-7 on page 33, the details of that change request are displayed in a form:

**Figure 1-8**

### Change Request Displayed in a Form

The screenshot shows a software window titled "140 - Master Change". The window has a menu bar (File, Edit, View, Tools, Actions, Help) and a toolbar with icons for Save and Close, and other standard actions. Below the toolbar, there is a status bar indicating "Due in 11 days". The main content area is divided into two panes. The left pane contains the following fields: ID: 140, Status: Registered, Description: Add extra processor to handle extra load of the Web Server, Information: The Web Server right now is not capable of handling the huge amount of requests, therefore an extra processor will be added, Solution: (empty), Configuration I...: SRVHP004, Project: (empty), and Manager: (empty). The right pane contains the following fields: Impact: Top (Site / Organization affected), Priority: 1 Top, Deadline: 19/10/2001 17:41, Actual Finish: (empty), Category: Unplanned, Classification: Incident/problem, Closure code: (empty), Category (Service ...: Unplanned, Status (Service To...: Registered, Assignment...: (empty), and Folder: (empty).

## How Service Desk Works

Functionally, Service Desk is divided in point solution modules while technically, Service Desk is divided into layers. Understanding the structure of Service Desk will help you understand the behavior of the application and prevent problems from occurring.

### Functional Structure of Service Desk

Each Service Desk process is supported by a module. Point solutions group different modules together to form a solution for one specific Service Desk problem.

#### Focus on Solutions

Effective IT infrastructure management presents a number of issues:

- How to deliver cost-effective service
- How to justify IT configuration items
- How to manage an evolving IT infrastructure
- How to handle users

You will be faced with one or more of these issues when you manage an IT infrastructure regardless of the scale of your IT infrastructure. For example, when you are at home, using your computer to write a letter, the same issues occur as when you are managing a network of 3,000 or more nodes in a global company. Depending on the type of computer you use, you must invest time to maintain it. The computer must work and be configured properly. In addition, the settings of the underlying operating system must be correct to ensure the computer is working. If someone changes your computer settings, the time you need to return the computer to the default settings may be considerable. You may even consider purchasing another computer for other members of your family.

The example described above illustrates the cost effectiveness of a service. The service is the availability of a word processor when your child is not using the computer. The cost effectiveness in this example is expressed in the time you need to adjust the settings for the word-processor and the operating system compared to the time you actually use the word processor.

When you scale this example to a company with a network of over 2000 nodes, you can appreciate the greater responsibility to act promptly. You must focus on delivering solutions, and Service Desk supports you in this goal.

## **Technical Structure of Service Desk**

To optimize performance and scalability, Service Desk uses a three-tier architecture system consisting of the following:

- A database server
- An application server
- A client

## **Ensuring a High Quality Application**

Service Desk is built on object-oriented methodologies using Java™, an object-oriented language.

The visible part of Service Desk on the client computer runs in a Java Virtual Machine. Features are added to check versions of the user classes when Service Desk is started. Whenever a new version of a Java class is available, Service Desk updates to the newer version. Depending on the number of new Java classes, this update will never take more than a few seconds. This ensures that the used application is always up-to-date.

## **Ensuring High Usage Flexibility**

High flexibility is offered with Service Desk in two ways:

- By minimizing network traffic, the load on the network is reduced and the database is able to service more users.
- By distributing Service Desk over the client and the server computer, you can use Service Desk from anywhere using a modem and still have workable response times.

---

## **2** **Product Concepts**

This chapter gives an overview of the general concepts and user roles behind Service Desk. Understanding the concepts upon which Service Desk is based is critical to optimizing usage of Service Desk within your organization.

## General Concepts

Service Desk is a structured, process-oriented application that supplies effective tools for managing, reporting and improving your IT support processes. An IT support environment is easier to manage when business-critical service levels are well-regulated. Centralized management of your IT support is provided by Service Desk's capabilities.

### ITIL

Service Desk is based on ITIL principles. ITIL (the IT Infrastructure Library) was created by **CCTA** (Central Computer and Telecommunications Agency) to address the need for consistent quality within IT. ITIL essentially helps organizations improve their IT service management. As the foremost comprehensive guidance on **IT service provisioning**, its implementation or similar best-practices methodology is critical in assuring your IT users receive a high level of service.

ITIL covers a number of service management elements, including service support, service delivery, infrastructure management, application management, and the business perspective. Each element focuses on a range of issues. For example, service support concentrates on the service desk function, which draws on processes such as incident management, configuration management, change management, and problem management.

The concepts upon which ITIL and most best-practices principles are based recognize that organizations are increasingly dependent on IT services to satisfy their business needs. The dependency on IT services requires a high quality IT infrastructure and service management process. Quality must be in line with business needs and user requirements.

ITIL processes provide a high quality environment for the management of IT services and IT infrastructures. ITIL best practices explain how to provide quality IT services while facing skill shortages, budgetary requirements, system complexity, and user requirements.

## How Service Desk Uses ITIL

Service Desk is designed specifically for companies and departments responsible for providing outstanding IT service. Service Desk manages the processes that define, negotiate, document and manage services that are delivered to IT users. IT users require assistance and Service Desk provides the tools to ensure that services are supported in a cost-effective manner.

You can employ Service Desk processes to provide effective management of your IT service provision, IT infrastructure and customer support center. Service Desk supports the following processes and functions based on ITIL best practices.

- Service desk
- Incident management
- Problem management
- Change management
- Service level management
- Configuration management

Details of the above processes are discussed later in this guide. A short description of each of the processes follows. The descriptions below provide a starting point for understanding how Service Desk works.

### Understanding Service Desk Processes

A **service call** is a record of a request for support from a user about an IT service. The service call is created the moment a user contacts the service desk. After a service call is received and created, it is constantly updated with information in response to the request made by the user.

An **incident** is an operational event which is not part of the standard operation of the system. **Incident management** is the process of documenting, monitoring, and resolving incidents to restore the standard operation of a system. The word “system” here is not limited to the hardware of the IT infrastructure; the system is everything that is

involved in supplying an IT service. This not only includes the hardware but also intangible things such as knowledge of the specialists involved in delivering a service.

A **problem** is a condition identified from multiple service calls and incidents exhibiting a pattern of common symptoms or, if derived from a single incident, an indication of an unknown cause. **Problem management** is the process of analyzing service calls and incidents to identify the cause. Investigating and resolving an unknown cause is part of incident resolution. However, whereas incident resolution is only focused on resolving the individual incident, problem management utilizes associated techniques and information to pinpoint the cause. Once the problem is found, a change can be initiated to prevent further incidents from reoccurring. Problem management may also conclude that the cause of one or more incidents is known but that the change is not feasible. The problem then is a **known error**. A known error can be seen as a special instance of a problem.

A **change** is a detailed description of modifications applied to the managed IT infrastructure or anything necessary for delivering the service. Anything that is related to delivering the service in the IT infrastructure can be changed except for the service and the service level agreement. **Change management** is the process of controlling and managing changes from the moment that the change is proposed until completion. A change can be proposed through problem management or directly as a request for change. Change management finds the justification for the change and, if the change is agreed upon, the change is performed. Changes can be grouped together into a **project**.

A **configuration item** (CI) represents an object in your IT infrastructure. All the configuration items together define the working IT infrastructure environment for the employees of your IT support organization and possibly your customers. A configuration item is not only hardware but can also be software. **Configuration Management** is the process of controlling and managing configuration items throughout the life cycle of a CI. The life cycle of a configuration item begins at the proposal of acquisition and ends with its disposal.

**Service Level Management** is the process of defining, agreeing, documenting, and managing the service levels that are required and cost justified. The **service level agreement (SLA)** specifically details the contents of the agreement between an IT service provider and customers. A clear and concise description of the service level agreement simplifies



the agreement upon the conditions for the IT service provider as well as the customer. The service level agreement details the level of service provided to customers.

## Service Desk Roles

Different people are involved when implementing and using Service Desk. The level of involvement ranges from people whose work is supported by Service Desk while they do not notice the existence of the application, to people who actively work with the application on a daily basis. A role defines the rights and responsibilities that a Service Desk user has.

The primary roles in Service Desk are:

- Service Users
- Customers
- Contact persons
- Specialists
- Organizations
- Configuration managers
- Change managers
- Problem managers
- Service level managers
- Personnel and organization managers
- System and application administrators

### Service Users

Service users are the receivers of services. Service users have the hands-on experience with the service delivered. It is the work of the service user that is supported by the service.

A service user in general will not know a support organization is using Service Desk. Service users can contact their help desk by telephone, fax, e-mail or HTML Web browser using Service Pages (SP). When using SP, the service user is able to interact directly with the Service Desk application using a Web browser.

## Customers

Services are agreed upon with customers. Customers can be individual service users, but a customer can also be a department or company. The service provider manages the IT services of the customer for the delivered services, not necessarily to the individual users.

## Contact Persons

Contact persons are involved in the use of Service Desk when contracted service is provided or received. The contact person is the intermediary through whom both parties of the contract communicate.

Contact persons work in the following two scenarios:

- The service provider delivers a contracted service. In this scenario the contact person is the link between service users and the service provider. The contact person provides first level support; if the severity or complexity of events goes beyond the contact person's skills, the contact person forwards a service call to a specialist.

An example of this scenario is the relation between an application supplier and a customer company. The service provider is the application supplier while, within the customer company, first level support is supplied by the help desk of the customer. In the help desk, one person is responsible for immediate support of the application. This person will also be the contact person towards the application supplier such as a help desk operator.

- The service provider receives a contracted service. In this scenario the contact person, an employee with the contractor, is the link between the service provider and the contractor. The contact person is now responsible for accepting and responding to any calls of the service provider.

Another example of this scenario is the relation with a lease company. The help desk of an IT support organization contracts a lease company for most of the hardware. If a monitor breaks down, the IT support organization calls the contact person of the lease company to request a replacement.

From the above examples, you notice that the contact person is only the name of a person who is responsible for executing on an agreed contract. The contact person links the different service providers in a service delivery process.

## Specialists

Specialists are persons who are involved in delivering service to agreed service levels. Specialists are usually IT personnel trained in a specific service. Specialists perform specific tasks to maintain the IT infrastructure and the delivered services.

Specialists may be grouped within workgroups based on their specialization.

Well-known specializations are:

- Application
- Server
- Network
- Security
- Hardware
- Database

Of course, specializations may be different in your company. The identified specializations depend on the needs of the customers and the delivered services. Specialists may also be grouped into specialist workgroups. Each member of a specialist workgroup possesses similar skill sets and expertise.

Specializations that are not critical to the service provider may be outsourced. The contractor, whose core business is a specialization, is not a specialist or a specialist group. The contractor is an outside company, with a contact person to link the companies in the service delivery line.

## Organizations

All the roles discussed in this section are part of an organization. An organization describes the companies to which each person is a member. Usually the organization structures registered in Service Desk follow the structure of a company.

## Configuration Managers

Configuration managers help organizations deliver quality IT service by controlling and regulating the IT assets of organizations. The duties of a configuration manager which can be supported by Service Desk are:

- management and control of all configuration items;
- maintenance of records pertaining to configuration items;
- auditing the IT infrastructure for authorized CIs;
- controlling changes to CIs.

## **Change Managers**

Change managers ensure that modifications to business systems are monitored and implemented. As businesses develop, the following events may necessitate changes:

- Problems raised by incident or problem reports
- User dissatisfaction
- New configuration items
- Component upgrades
- New business requirements
- New legislation
- New products or services

The change manager monitors and evaluates the efficiency of the service desk at every stage. Overseeing the coordination and implementation of changes requires a firm grasp of IT resources and services available.

## **Problem Managers**

A problem manager's responsibilities can be divided into five areas:

- Incident control  
Provision of second level support after the help desk for diagnosing and resolving incidents and coordinating with other support specialists.
- Problem control  
Identification, diagnosis and documentation of root causes of incidents to prevent reoccurrence and to identify potential problems.
- Error control

The process of resolving and correcting problems in the IT infrastructure.

- Proactive prevention control  
Preventing problems in the IT infrastructure before they occur.
- Management information from the control processes

## **Service Level Managers**

Service level managers focus on providing high-quality IT infrastructure services with a particular focus on customers. A service level manager understands the complex relationships between inter-dependent and supporting services, sets up service level agreements that function coherently, and monitors the targets within these agreements so that service providers and customers can review their performance.

In establishing an understanding of service relationships, the service level manager identifies the following:

- Services that can be broken down into component parts, which can be offered as a whole or in part
- Business services that either use or depend on other business services
- Operations management services that maintain the configuration items used by business service
- Operations management services that outsource certain aspects of maintenance support to underpinning services

In defining SLAs, the service level manager focuses on the following:

- Quality service provision
- Cost justifiable service quality
- Services that meet business, customer and user demands
- Integrating Service Desk processes
- Identifying roles and responsibilities in service provision
- Illustrating performance indicators

## **Person and Organization Managers**

Person and organization managers ensure that entries and updates to IT infrastructure users and service desk personnel are current. The service desk personnel entries should be monitored to provide information on staffing needs required to meet agreed service levels. As businesses develop, the following events may necessitate adding and removing person and organization entries in Service Desk:

- New service desk employees.
- New users.
- New customers.

The person and organization manager monitors and evaluates the efficiency of the users and service desk staff entries at every stage. As each CI is an asset related to an organization or user, integrity of the person and organization entries in Service Desk is paramount.

## **System and Application Administrators**

System administrators and application administrators define and maintain the standard settings for Service Desk implementation. In consultation with IT infrastructure management, the system administrator and the application administrator regulate the overall look and feel of Service Desk.

System administration tasks include account administration, access rights and managing roles within Service Desk.

Some of the tasks of system and application administrators will often be performed by consultants.





---

## **3 Service Desk Features**

This chapter describes some of the key features Service Desk provides to support the implementation of your business processes.

## Templates

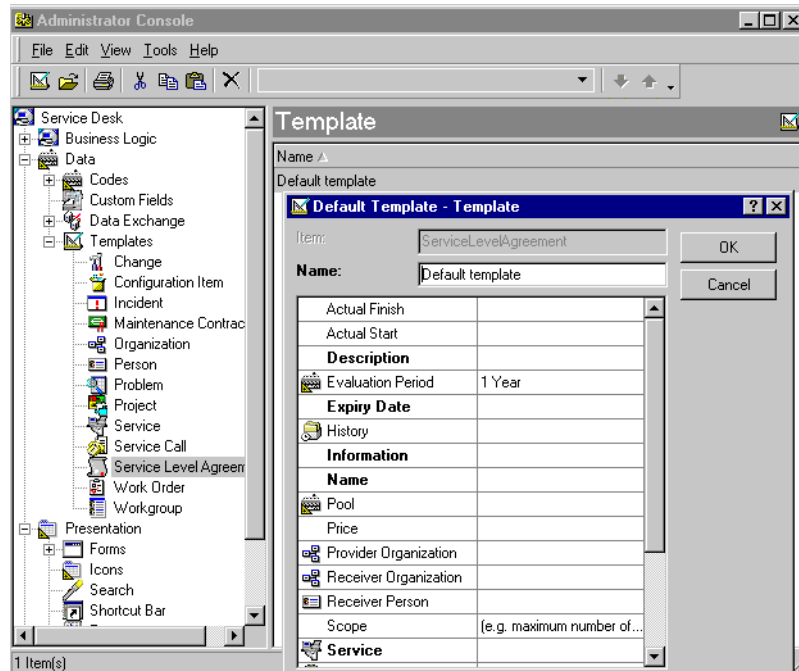
Whenever a new item is created in Service Desk, values are copied into it from a template. After the new item is created, you can edit the fields and enter further values in the new item. Each type of item has at least one template. Additional templates can be created for each item type to handle issues of a specific nature; for example, service call templates might be created to handle the arrival of a new employee or to create a new user account.

For specific information on implementing templates, please refer to *HP OpenView Service Desk: Administrator's Guide*.

Service Desk provides templates that can be configured and then used as part of your implementation. By using the supplied templates, you can speed up implementation and improve processes immediately.

For example, a template for Service Level Agreements can be used to apply a particular evaluation period:

**Figure 3-1** An Example Template



Each time a service level agreement is created, the evaluation period specified in the template is automatically entered in the correct place on the form.

You can customize any template to present the information required to support your business strategy.

Templates can be configured to establish relations with other existing items, or to trigger the creation of new related items. For example, a service call template for registering a forgotten password can be set up to trigger the creation of a work order that requests resetting the password.

Templates should be reviewed regularly and altered if required as a result of changes in your business practices.

If you create a large number of templates, you can organize them into template categories. See “Administrator Console” on page 67.

## Approval

The delivery of business-critical IT services depends on prompt decision making. Steps within the IT management process may need to be authorized to maintain agreed-upon service levels. Ensuring that the appropriate specialists are involved in decision making before implementation is crucial to productivity. When authorizing IT management processes, it is counter-productive and time-consuming to manually track issues requiring action.

Service Desk provides a structured, process-oriented approval mechanism for managing and authorizing IT management processes.

### Introducing Approval

Approval provides the ability to automatically request authorization for issues requiring action. For example, if a change to your network is required, how can the appropriate specialists authorize this change in a timely manner? Approval ensures that agreements to proposed actions are secured automatically in line with your company's strategy.

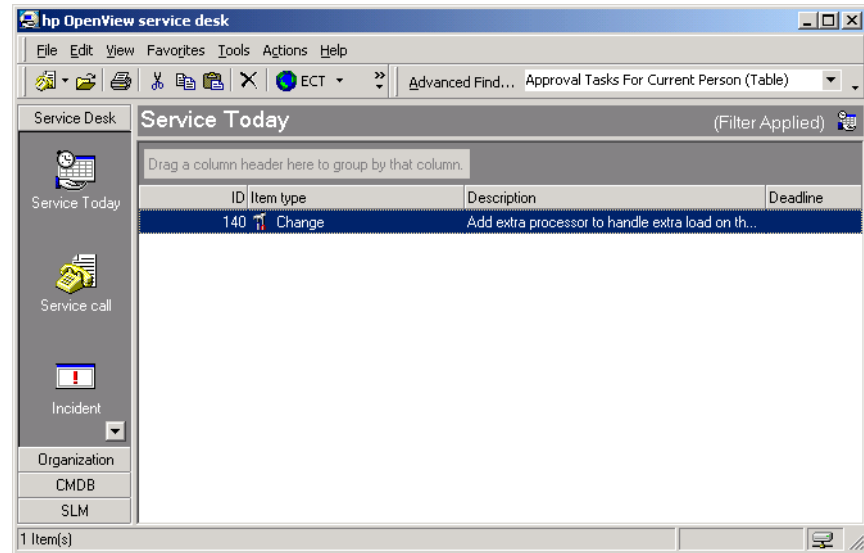
The approval process is conducted using an approval sheet. The status of the approval sheet is initially *Inactive*. In this stage, the approval sheet indicates a deadline date for a response and identifies the personnel who need to grant authorization.

The status of the approval sheet is changed from *Inactive* to *Active* to begin the approval process.

Approvers can view all the items awaiting their approval by selecting a suitable view, such as the *Approval Tasks for Current Person* current view in the *Service Today* data view:

Figure 3-2

## Viewing Approval Tasks



Approvers can search for items that require their approval using the More Choices tab page on the Advanced Find dialog box (see “Using Advanced Find” on page 82).

Users can also choose to be automatically notified of approval tasks by e-mail.

---

**NOTE**

Approvers can only receive automatic notification of approval tasks by e-mail if this facility has been enabled in the Service Desk client on the machine they are using. Information on how to enable notification of approval tasks by e-mail is available in the Online help.

---

The approvers then vote by selecting Yes or No. The results are automatically tabulated and, when enough predetermined approvers have authorized the action, the approval status automatically changes to Ready. The approval result reflects that the approval task has been completed and, if approved, implementation can begin.

If approvers have not entered a vote at the end of the predetermined approval period, the approval sheet status automatically changes to Ready. The approval result, however, is Rejected.

## Approval Sheets

Approval sheets can be added to work orders, changes, projects, problems, incidents, and service calls.

The approval sheet is used by the approval initiator to start the approval process, and as a ballot by the designated voters.

Figure 3-3

## Approval Sheet

131 - Master Change

File Edit View Tools Actions Help

Save and Close Default template

Overdue by 42 days.

ID: 131

Status: Registered

Description: Upgrade workstations to e-Vectras

Information: desired: All PCs built before 02/04/98 should be replaced by e-Vectras: Intel® Pentium® III 800EB MHz to 933 MHz processor with 256 KB full-speed level-2 cache 256 MB SD RAM Integrated Intel 3D Direct AGP

Solution:

Configuration I... PCKAY006

Project:

Manager:

General Approval Sheet Work orders Relations Time/Cost Predec

Requestor:

Initiator: Johnson, Martin

Description:

Approval Status: Active

Deadline:

Result: Incomplete

#Approvers Requir... 2

Strategy: 2 Out of 2

Approval group:

Approval Votes

Approver	Approver Organization	Approved
Scholes, Ann	IT Operations Department	
Swires, Steve	IT Operations Department	

Add... Modify... Remove...

Although approval sheets can be customized by administrators, by default the approval sheet consists of the following fields:

- Approval Status  
The approval status can be set to Inactive, Active or Ready.
- Deadline

This is the last date that a vote on an approval sheet can be received.

- #Approvers Req

The number of accepted votes required by the designated specialists before the process is approved.

- Strategy

The strategy describes how many approvals are required out of the total pool of specialists that were asked to vote. For example, if 10 specialists were asked to approve an action, if your company strategy is that only one of the specialists must approve the process, then the strategy would be 1 out of 10.

- Description

This is a free text field and contains a description of the action that requires the approval procedure.

- Information

This is a free text field that contains any information that relates to the description, such as why the change is required, and could help in the decision making process for the approvers.

- Approval group

When the `Approval group` field is left empty, the approval initiator can fill in arbitrary persons as voters.

When a work group is selected as an approval group, all the members of the work group are listed as voters. At this stage, the approval initiator can decide to remove one or more of the work group members from the list, for example because they will not be able to respond before the deadline. The approval requestor is automatically removed by the system. When the `Approval group` field is emptied, the `Approver` list remains unchanged. When another group is entered in the group field, the members of this group are added to the list of approvers. The number of approvers is unlimited.

- Approval Votes

Information regarding the specialists voting on actions can be previewed here. The preview contains the approver's name and vote. If the specialist has rejected the action, a reason will be displayed.

- Result

This field reflects the results of the voting.

## Approval Roles

The responsibilities of your specialists are based on their areas of expertise. To best utilize their knowledge, as well as strengthen your service desk performance, several crucial roles must be identified. The approval roles will assist in developing effective implementation of the approval feature.

To implement the approval feature, you should identify staff for the following roles within your organization:

- **Approval initiator**  
An action requiring approval must be identified. This process is completed by specialists, help desk employees, change managers, problem managers, or anyone authorized within your organization.
- **Approval activator**  
Changing the status of an approval sheet from *Inactive* to *Active* is crucial to beginning the approval process. An approval activator can be the approval initiator or someone designated by your organization to review proposed approvals before beginning the approval process.
- **Voter**  
The specialist who is designated by the approval activator or approval initiator need to vote on the approval sheets. The specialists can be notified automatically of issues requiring their vote. Approvers can be individual specialists or part of a defined group.
- **Approval monitor**  
To ensure that decisions are made in a timely manner, a role such as a change manager may be designated to monitor approval sheet statuses. If an approval sheet has not been voted upon before the deadline, the approval monitor can be designated for final authorization.

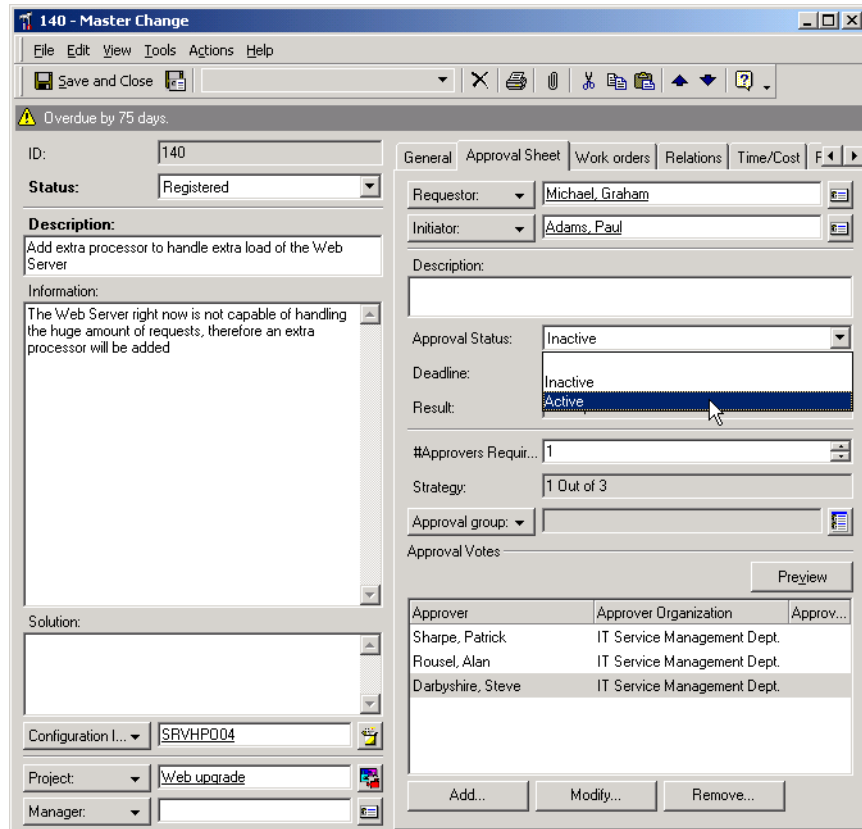
## Scenario: Approving a Change Request

Paul Adams, a change manager at Invention Incorporated, receives a request to approve a change proposed by a problem manager (see “Scenario: Initiating a Change” on page 162). The change involves adding an extra CPU to a web server. He initiates the approval process. Approval initiation involves specifying the voters, the deadline for voting, and the approval policy (that is, the minimum number of positive



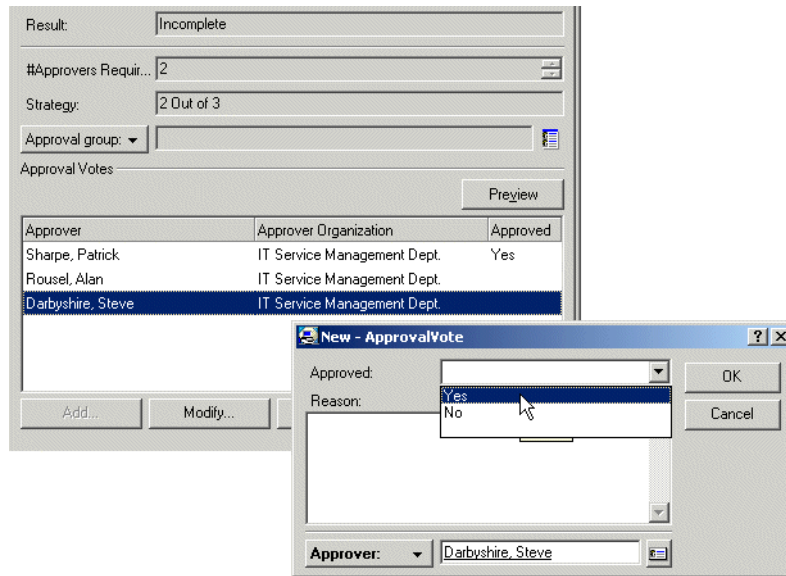
votes that must be cast for approval to be granted). For this process, three voters are added, and a minimum of two voters must vote in favor of the change. Having registered himself as the approval initiator and defined the approval settings, Paul can now activate the approval process:

**Figure 3-4** Initiating the Approval Process



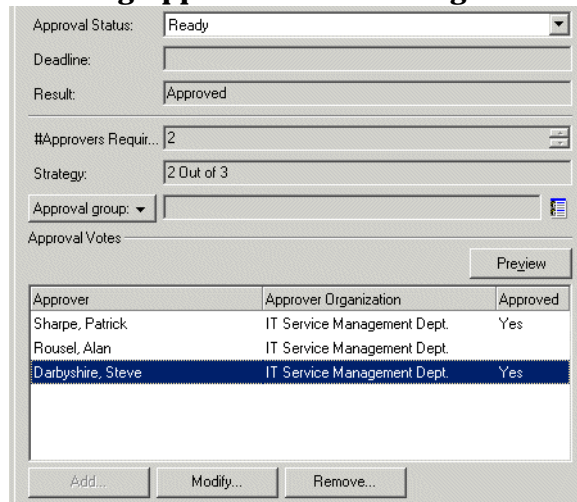
As soon as the approval process becomes active, Service Desk prevents the approval settings from being changed. Service Desk sends each voter an e-mail message notifying them of the requirement to vote. At this stage, the approval result is set to Incomplete.

**Figure 3-5** Voting



As soon as a second voter approves the change, Service Desk sets the result to *Approved*, and the approval status is set to *Ready*, indicating that the approval process is now complete:

**Figure 3-6** Granting Approval for the Change



Now that the change has been approved, it can be planned in detail (see “Scenario: Planning a Change” on page 150).

## Managing Work

This section describes features that help users manage their work.

### Service Today

The Service Today data view gives a comprehensive overview of items that are assigned to the user who is currently logged on. Service Today shows all service calls, incidents, work orders, problems, and changes that have the user as the responsible person.

Service Today views can be created and modified just like any other item.

### Work Orders

Service calls, incidents, problems and changes often result in a large amount of work to be done. Work orders enable Service Desk users to plan, assign and follow up on that resulting work. A work order can be related to the item from which the work results, or it can be created independently of any other item.

All work registered in a work order has a priority, and progress of the work is shown in the work order status. Details regarding the planned cost and maximum time expected for task completion can be noted in the work order. An estimate of the time that it will take a specific workgroup to perform the work can be made with the planned time estimate. The person who creates the work order can give it a deadline for completion and assign a time limit for the maximum amount of time to be spent on the work. As the work progresses, the work order can be updated with information reflecting the actual completion time and date, the time spent working on the item, and any costs incurred or other changes in the scope of the work. It is possible to view the status of each work order and make adjustments to the scheduled work as necessary.

Work orders provide an audit trail of completed work or work still in progress. Responsibility for completing a work order can change. If the individual assigned the work order cannot complete the task for some reason, it can be assigned to another specialist or back to the individual who originally assigned the work.

Service Desk automatically creates history lines whenever a work order's status is changed. The history lines record who changed the work order and when the work order was changed. By viewing the history lines, Service Desk users can determine when a work order is completed, overdue or not progressing. You can also record additional information that may help solve the work order and use it to track the amount of time spent working on the work order.

## **Assignment**

Assignment is a key feature in managing work. Assignment enables the most suitable person to be made responsible for handling an item. With assignment, every Service Desk user can see who is responsible for an item. Service calls, incidents, problems, projects and changes can all be assigned.

When assigning work to a workgroup, a planned time estimate can be made to help determine which workgroup is able to perform the work in the allotted period of time. The opening hours calendar and holiday schedule associated with the workgroup is used to determine a planned finish time. If the workgroup meets the deadline requirements you can continue and dispatch the work, or perform the calculation again with another workgroup.

## Life Cycles and Status Codes

Each item in Service Desk goes through a life cycle. Status codes are used to show where an item is in the life cycle. The status given an item determines its state in the life cycle. The item is first created and then it goes through a period where it is either active or idle, and your organization is either accountable for the item or not. Eventually the item transitions to a closed state and is deleted or archived.

Each kind of item has its own life cycle. For example, all service calls, incidents, problems and changes have a similar life cycle. However, the life cycle of a service level agreement, or a configuration item is different.

Let us look at the general life cycle of a service call. When a customer calls the help desk, a service call is created. At this point in most organizations the item is considered to be in an active state, and the organization is accountable for providing support. If the help desk employee cannot solve the issue, the help desk employee dispatches the service call to a specialist. The specialist accepts or rejects the service call. The specialist can also plan the work or dispatch the work again to another specialist. During this time the status of the service call changes and the service call switches between active and inactive states depending on the status given. Later, the specialist solves the issue or completes the work and dispatches the service call back to the help desk. The help desk then contacts the customer to discuss the solution. At this point the status changes again and the item may go into a not-accountable state, while the customer evaluates the solution. If the customer accepts the solution, the service call is given a closed status and work on the service call stops. The service call may be used for analysis, to generate an SLA evaluation report, or become part of a knowledge base, for example. At this point the service call is in an closed state. The service call will eventually be deleted or archived to make room in the database, ending the life cycle of the service call.

The life cycle of the service call is almost linear. The service call is created, handled and finally deleted or archived. Some steps such as dispatching, planning and working on the service call may take place more than once. The life cycle of the service call becomes circular when the customer rejects the solution, and work on the service call is reopened.

The item's position in its life cycle is expressed in the item's status code. In the example of a maintenance contract, the status codes used for the item are: In negotiation, In test, In production and Annulled. As you see, the status codes only show the life cycle steps that are important for use in Service Desk. In other words, the status codes are a schematic representation of the item's life cycle in real-life.

Depending on how an item is handled in your company and on the information your company thinks is important, Service Desk items can have a small or a large number of status codes. These status codes can then be assigned a state. You can create views and reports based on the state of an item. For example a view can be defined to show all open service calls that are not being worked on that should be worked on. This would be an idle item that is in an accountable state.

## **Folders and Categories**

Folders and categories help with the processing of Service Desk information. Essentially, they both group items, but in different ways, as explained below.

### **Folders**

By placing items in folders, users can separate items according to customer groups, business types, or any predetermined grouping. For example, your organization may work with different customers. Those customers can be different departments in one company, or they may be different companies. Within your organization, personnel may be dedicated to one customer group. By separating items into folders, each Service Desk user can concentrate on the needs of specific folders.

The use of folders is best illustrated in a help desk environment. In a large help desk environment, customers are given a telephone number that is specific for their company or their user type. The calls for one customer or business type now all come in at the help desk through one help desk employee or one workgroup. The help desk employee knows all about his regular customers, knows the common problems of the folder and knows the best specialists for the folder. If this help desk employee only needs to work on the items for one folder, it speeds up the work. Service Desk can retrieve only the items from the folder the employee works on using views that filter on the folder field. Not only help desk employees, but also specialists can be dedicated to work for one group and can benefit from the use of folders.

Using the folder entitlements feature is a way to further refine user access capabilities. This is done by providing the means to limit access to folders for each Service Desk item. The effect this has on Service Desk users is that when a user searches for items or displays a data view, the user only sees items in the folders to which they have access. For example, a user with a particular role can be permitted to modify service calls for Inventions Inc. but only view work orders. The users will only be able to create, view, modify, or delete those items in the folders that their folder entitlements permit.

## Categories

By placing items in the correct category, items can be handled in the most appropriate way. For example, it may be important to distinguish between service calls that register a complaint and service calls that request information. You can then define views that only show one or more specific category.

Each type of item can have its own distinct category structure. Category structures can be very complex. Configuration items, for example, may have a category structure with a number of levels. Each level in the structure categorizes an item more specifically. The different levels of category structures are displayed in a tree view, which shows the hierarchical structure. The higher category is more general; the lower category is more specific. In general, items are placed in the most detailed category that is applicable.

Categorizing an item also results in enabling or disabling custom fields. All custom fields defined for an item are shown in the item's form. However, some custom fields may not be applicable for a category. For example, two custom fields may be defined for configuration items: one custom field shows the IP address of a network card, the other custom field shows the paper size of a printer. The custom field for the IP address is only applicable when the Network category is used for the configuration item. When you select the Network category, the paper size is disabled. For printers, only the paper size is applicable.



---

## History Lines

History lines act as a diary by recording what happens to an item. Service Desk users can add comments that can be helpful for handling the item. History lines can also be used to keep track of the time users spend working on an item. This information can be added up for project planning or for tracking the amount of hours billed to customers, for example.

Items in Service Desk are modified every day. Some modifications are small and unimportant, but often it is essential to know who made a change. For example, it may be necessary to know who closed a service call. The history lines in Service Desk provide the tools to record this information.

Tracking the changes of items is called auditing. The audit policy defines what information Service Desk writes in the history lines. The default setup is based on what most Service Desk clients consider to be minimum requirements.

History lines can be system-generated or user-generated:

- System-generated history lines are created by Service Desk. For example, when an item is changed, a history line can be generated revealing when the change took place, who applied the change, and what the change was. System-generated lines cannot be changed by Service Desk users, but extra information can be added to them. Not everything that happens to an item needs to be registered in history lines. The system administrator controls what is registered and what is not registered.
- User-created history lines are an excellent means to pass on information that can be helpful when handling the item. User-created history lines can also record questions, contain copies of e-mail correspondence, hold a summary of a telephone call or reference other material that is used to handle the item. A user-created history line also shows when the line was created, and by whom. Users can modify the subject and the information of user-created history line.

## The International Support Desk

For many IT support organizations, the IT business operates globally. Customers and colleagues may be distributed over an entire continent or even around the world, working in different time zones. Using Service Desk and modern communication technologies, IT support organizations are able to solve the day-to-day problems of global IT infrastructures.

### Time Zones

Deadlines — the dates and times by which events must be solved — are agreed upon in the customer's local time. Customers want to know the target date and time expressed in their local time, whereas colleagues want to see deadlines expressed in their local time. Service Desk users can switch between displaying dates and times in the local time of a customer, a colleague, or their own local time. This way, when talking to a customer, users can discuss dates and times in the customer's own time zone and still see what it means for your own schedule or that of a colleague. Service Desk also takes into account daylight saving hours for you and your customer.

Service Desk can support your work around the world, because date and time information is stored in Coordinated Universal Time (UTC). UTC is considered standard time: all other times and time zones are calculated from UTC. For example, if you live and work in Minneapolis (MN, USA) you are in the Central Standard Time (CST) time zone. In the CST time zone it is 6 hours earlier than it is in the UTC time zone. To calculate local time for Minneapolis, six hours are subtracted from the stored time. To calculate local time for Tokyo, Japan, nine hours are added to the stored time.

### Localization

By localizing, you can translate or adapt almost any text used in Service Desk for use in a local language, or for use with your organization's glossary of IT terms.

Service Desk uses UTF-8 character encoding, and adheres to the Microsoft Windows language standards, so every language that can be set in Microsoft Windows can be set in Service Desk.

## Service Desk Flexibility

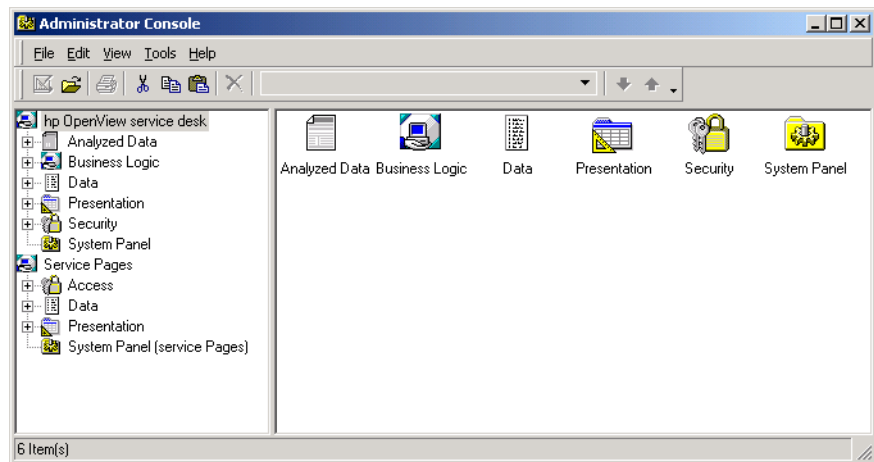
Service Desk provides flexibility in configuration and customization. System administrators can use the Administrator Console to configure and customize Service Desk centrally for all users, while individual users can select options and apply customizations that do not affect other users.

### Administrator Console

The Administrator Console enables system administrators to apply settings, and to design forms, views, graphs and fields for distribution to users with the correct authorizations:

Figure 3-7

#### Administrator Console View



Administrators can fine-tune Service Desk settings according to the needs of a specific IT infrastructure. Settings can be changed whenever service policies need to change.

Administrators can create and modify the following definitions in the Administrator Console:

- Accounts and roles

Accounts provide users with access to Service Desk. Roles control the things users can do in Service Desk. Roles determine access rights to items, fields, views, forms, templates and actions. Roles can fine-tune access rights to items by setting entitlements based on folders and status. Roles also determine whether users can apply customizations to the toolbar, create shortcuts, create or modify views, and so on.

- Business logic

- Rules

Administrators can create rules that makes it possible to execute a number of different actions in Service Desk. Two types of rules can be created for this purpose: database rules, and UI (user interface) rules. Each rule triggers an action when items are created, deleted, or changed in the Service Desk database or in the graphical user interface.

- Actions

Smart actions are shortcuts to additional tasks performed by external programs. An example would be using Microsoft Excel for a report on all CIs.

System actions are shortcuts to features designed by the Service Desk developers. System actions are created for tasks that would be too complex to be completed manually. System actions include a checklist wizard that can be used by help desk personnel to ask standard questions when customers request service, and a CI wizard that can be used by configuration managers to create batches of configuration items.

Overview actions are shortcuts to views that display information based on the current context.

- Views

Administrators can create system views and control user access to them. If users are authorized, they can create their own custom views or modify system views. A modified system view or custom view is only available to the user who created it.

- Forms

Using drag-and-drop actions, administrators can easily design forms.

- Fields

Administrators can add, remove, or update required fields in the **CI lifecycle**. An example would be requiring an authorization field for change requests.

- **Templates**

In addition to the templates provided on the demo database, you can create new templates to fit the needs of your specific IT infrastructure. For example, you can create a template for registering new employees.

Templates are also used as part of the process of importing data into Service Desk from an external data source. For further details, please refer to *HP OpenView Service Desk: Data Exchange Administrator's Guide*.

- **Template categories**

You can create template categories and assign templates to them. This enables you to group similar templates together, and to organize templates into a structure. One template category structure is shared by all item types. One approach to using template categories might be to create a category for each type of item, and then to create a number of sub-categories below this level. For example, a template category for configuration items might contain separate sub-categories for different types of configuration item (such as hard disks, monitors, and so on).

- **General settings**

Administrators can modify, update or delete information behind all settings. For example, you can add a user's phone extension to the quick search capabilities.

## **Service Desk Console**

The Service Desk console enables Service Desk users to customize support information that they view, and to apply personal preferences to Service Desk options.

Information displayed in data views can be grouped, sorted and filtered without the time constraint of learning a programming language to do so.

The settings that users can apply include such things as the language used in user interface components such as labels, menus and messages, the appearance of required fields in forms, and the formats used for displaying and entering dates, times, currencies and numbers.

## Introducing Service Pages

Service Pages is an extension of Service Desk. Not only do users have the ability to contact the help desk via a Web browser, but they access the current data.

Service Pages supports two types of user: support engineers who already have access to Service Desk, and service users.

Service users can use Service Pages to do the following:

- Search for known solutions
- Read through frequently asked questions (FAQs)
- Submit and track service requests

Support engineers can use Service Pages to do the following:

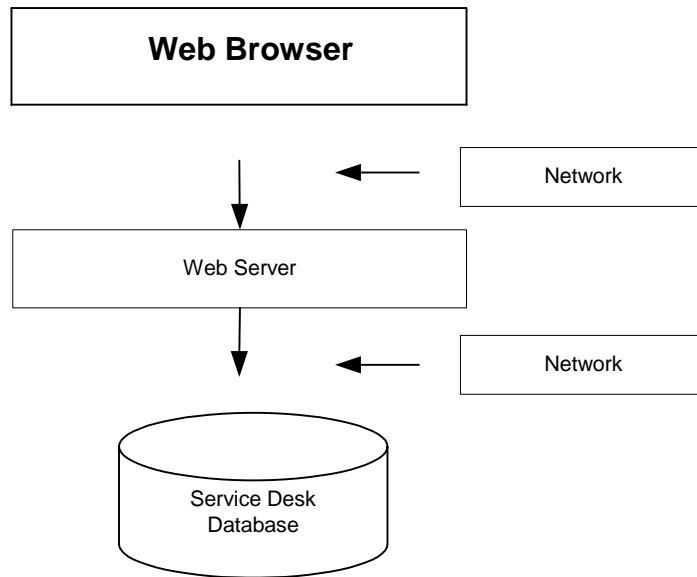
- Create service calls
- Create incidents
- Overview service calls
- Overview incidents
- Overview problems
- Overview changes
- Overview work orders

Support engineers can modify or view records when using one of the available overview options. The system administrator can define the layout of the overviews as well as the templates that are used to create records. When setting up the overviews, the system administrator specifies views for a restricted list and a full list.

## Accessing Service Pages

Service Pages can be accessed using an HTML browser such as Netscape® or Microsoft Internet Explorer®. The client communicates over the network to a Web server. The Web server can share space with the application server or be located elsewhere to balance the network traffic and increase performance. Your Web browser communicates with the Web server over a network.

**Figure 3-8**      **Service Pages Process**



### **Approval via the Web**

In order to change the status of an item such as a service call or a change, approval is sometimes required by one or more people. With Service Desk, a Web page is available from where approvers can vote on a requested action. The Approval Web page is not part of Service Pages and can only be reached through a specific URL that is sent to approvers by e-mail.



---

## **4 Basic Tasks**

This chapter describes basic tasks performed by all Service Desk users.

## Viewing Information

Service Desk offers considerable control over the way you view information. You can choose the content of information that will be displayed, for example all open service calls, and you can specify the format that you would like the information displayed. The basic formats for displaying information are:

- Table view
- Chart view
- Explorer view
- Card view
- Tree view
- Project view

### Using Table Views

Table views are the standard way to represent items. A table view of service calls, for example, shows each service call on a separate row, with values of specific attributes arranged in columns:

Figure 4-1

**Service Calls: Table View**

ID ▲	Deadline	Description	Status
22	01/08/2001 23:00	How can I look up a charge number in the ICIS system	Registered
23	27/07/2001 23:00	Password forgotten.	Waiting
25	27/07/2001 23:00	How to create a new section in a word document.	Registered
26	27/07/2001 15:00	Printer toner cartridge empty	Closed
27	27/07/2001 23:00	Password forgotten PROFS	Closed
28	01/08/2001 23:00	Calculation result error after retrieving sales volume re...	Registered
29	26/07/2001 17:00	User unable to mail messages via E-mail application.	Registered
30	27/07/2001 23:00	Computer locked up when trying to print VISIO docum...	Registered
31	27/07/2001 15:00	Printer paper jam during printing EXCEL sheet	In Progress
32	27/07/2001 23:00	Calculation results in an error after running the monthl...	Registered
36	27/07/2001 15:00	Printer toner cartridge is empty: error message: "Tone...	In Progress
37	26/07/2001 08:59	Mailservr probably down. Unable to access E-mail	Registered
38	26/07/2001 08:59	Unable to send mail via the E-mail application	Closed
39	26/07/2001 08:59	Mail server out of order: Users unable to use the E-ma...	In Progress
40	26/07/2001 16:00	ICIC response time beyond 3 sec	In Progress
49	26/07/2001 17:00	Forgotten e-mail password	Closed
55	26/07/2001 17:00	Forgot e-mail password	Waiting
56	26/07/2001 08:59	Forgotten e-mail password.	Closed

Information can be sorted in a particular order. For example, service calls can be sorted by resolution deadline:

Figure 4-2

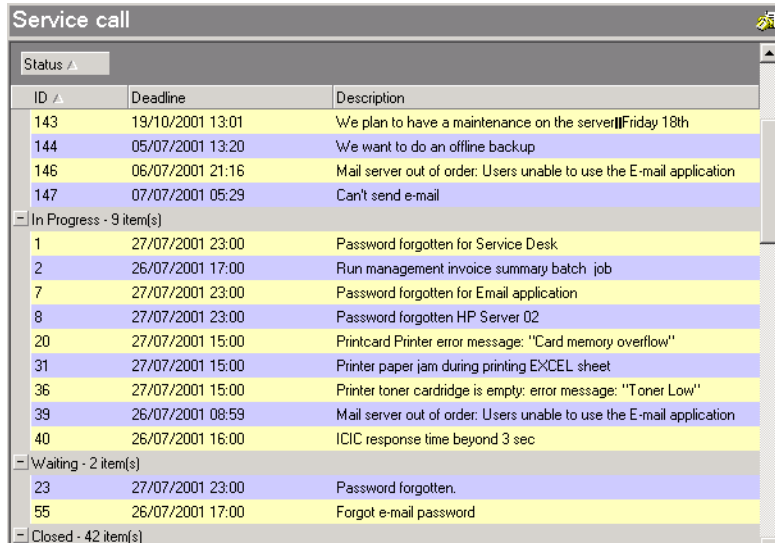
**Sorting Information in Table Views**

ID	Deadline ▲	Description	Status
20	27/07/2002 15:00	Printcard Printer error message: "Card memory overflo...	In Progress
118	27/07/2002 15:00	How do I compact MSOutlook PST Files?	Closed
120	27/07/2002 15:00	How do I perform a web query?	Closed
122	27/07/2002 15:00	Why does Word Fail to Open "Cannot Open The Exis...	Closed
119	27/07/2002 15:00	How do I specify what data is valid for data entry in c...	Closed
31	27/07/2002 15:00	Printer paper jam during printing EXCEL sheet	In Progress
36	27/07/2002 15:00	Printer toner cartridge is empty: error message: "Tone...	In Progress
66	27/07/2002 15:00	Password forgotten	Closed
26	27/07/2002 15:00	Printer toner cartridge empty	Closed
112	27/07/2002 16:00	How to Open Someone Else's Calendar or Other Folder	Closed
17	27/07/2002 23:00	Characters CPQ DeskPro keyboard produces unexpe...	Closed
27	27/07/2002 23:00	Password forgotten PROFS	Closed
32	27/07/2002 23:00	Calculation results in an error after running the monthl...	Registered
8	27/07/2002 23:00	Password forgotten HP Server 02	In Progress
30	27/07/2002 23:00	Computer locked up when trying to print VISIO docum...	Registered
7	27/07/2002 23:00	Password forgotten for Email application	In Progress
25	27/07/2002 23:00	How to create a new section in a word document.	Registered
23	27/07/2002 23:00	Password forgotten.	Waiting
64	27/07/2002 23:00	Password forgotten	Closed

Information can be grouped in a table view. For example, you can group together service calls according to their status:

Figure 4-3

### Grouping Information in Table Views



The screenshot shows a table titled "Service call" with a "Status" dropdown menu. The table is grouped by status, with expandable sections for "In Progress", "Waiting", and "Closed". Each group contains a list of items with columns for ID, Deadline, and Description. The items are color-coded: yellow for "In Progress" and "Closed", and blue for "Waiting".

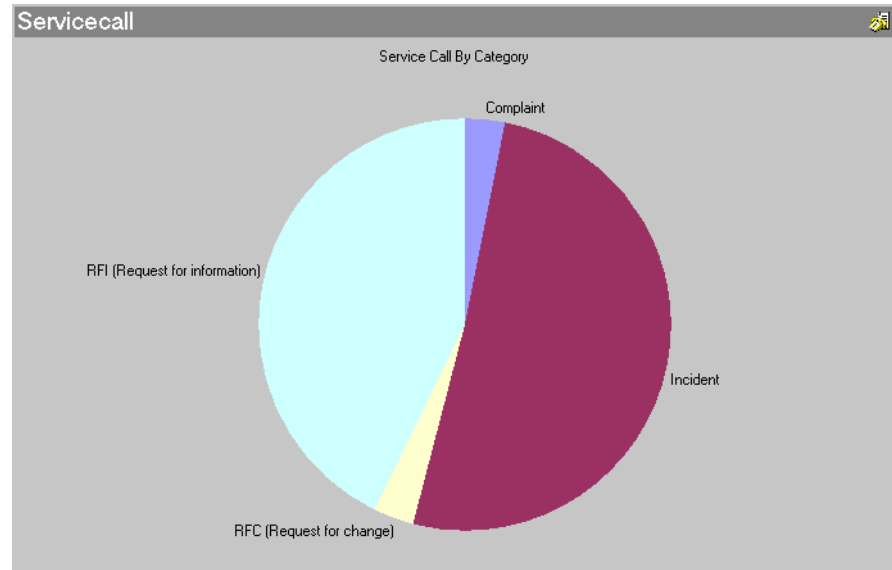
ID	Deadline	Description
143	19/10/2001 13:01	We plan to have a maintenance on the server on Friday 18th
144	05/07/2001 13:20	We want to do an offline backup
146	06/07/2001 21:16	Mail server out of order: Users unable to use the E-mail application
147	07/07/2001 05:29	Can't send e-mail
In Progress - 9 item(s)		
1	27/07/2001 23:00	Password forgotten for Service Desk
2	26/07/2001 17:00	Run management invoice summary batch job
7	27/07/2001 23:00	Password forgotten for Email application
8	27/07/2001 23:00	Password forgotten HP Server 02
20	27/07/2001 15:00	Printcard Printer error message: "Card memory overflow"
31	27/07/2001 15:00	Printer paper jam during printing EXCEL sheet
36	27/07/2001 15:00	Printer toner cartridge is empty: error message: "Toner Low"
39	26/07/2001 08:59	Mail server out of order: Users unable to use the E-mail application
40	26/07/2001 16:00	ICIC response time beyond 3 sec
Waiting - 2 item(s)		
23	27/07/2001 23:00	Password forgotten.
55	26/07/2001 17:00	Forgot e-mail password
Closed - 42 item(s)		

### Using Chart Views

Charts provide graphical overviews of items. A chart groups items and displays the absolute or relative size of the groups. Charts can present information in a variety of different styles. With the chart view, you have easy-to-read, on-screen reports that are printable:

**Figure 4-4**

**Service Calls: Chart View**



Charts also provide easy access to items. This is done by double-clicking on a portion of the chart to display a table view, card view, or another chart view containing the items related to that portion.

Chart views can be customized. For example, you can select the color scheme of the chart, the kind of chart to be displayed (such as pie, scatter graph, and bar), and in cases of 3D charts, the angle from which the chart is to be viewed.

A chart groups items along the x-axis and shows the quantity of each group (that is, the count) along the y-axis. For pie charts, the x-axis determines the individual segments of the pie, and the y-axis determines the size of each segment.

Instead of displaying the count along the y-axis, you can choose to display planned or actual costs or durations, and you can display any of the following calculated values:

- The total summation of cost or duration
- The average cost or duration
- The minimum cost or duration
- The maximum cost or duration

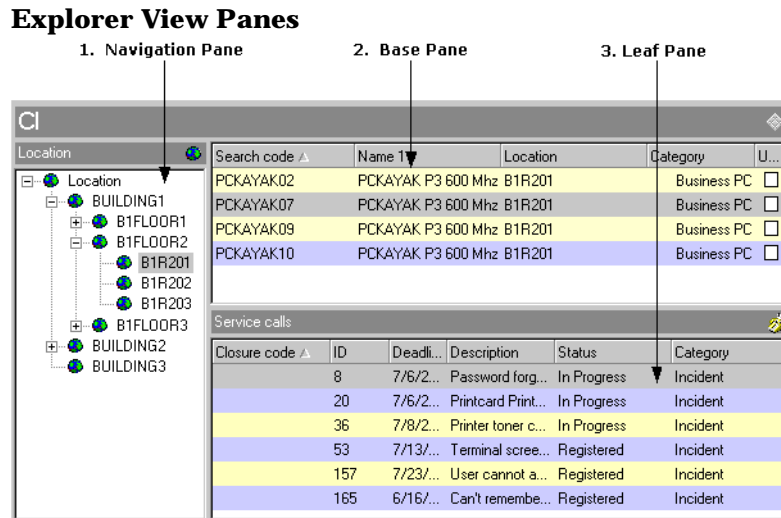
You can display a secondary value along the y-axis. This enables you to compare two contrasting values, such as planned and actual cost. Alternatively, the y-axis value can be broken down into a series of component groups. For example, instead of displaying the total number of service calls (y-axis) against the registration date (x-axis), you can display the service calls as a series broken down by impact code.

You can copy Service Desk charts and paste them into other applications such as Microsoft Word or Powerpoint.

## Using Explorer Views

An explorer view contains a navigation pane, a base pane and one or more leaf panes, as in the following example:

Figure 4-5



The base pane displays the basic information you are looking for. The leaf panes display details associated with the information highlighted in the base pane. The navigation pane provides a way of finding the basic information.

To find an item in an explorer view:

1. Navigate in the navigation pane and click an item.
2. Highlight an item in the base pane.
3. The leaf pane will display details associated with the highlighted item.

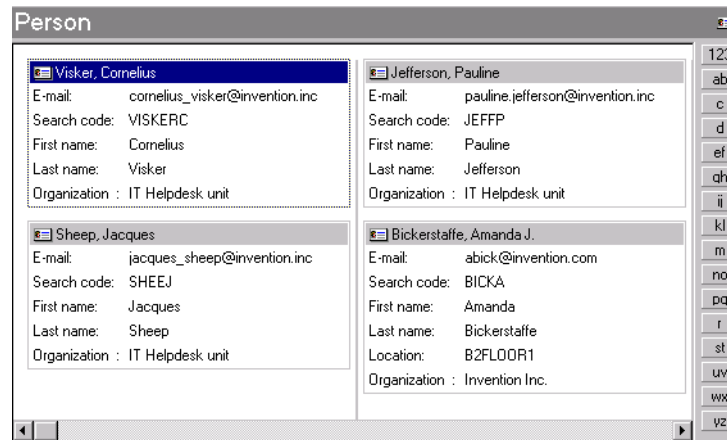
For example, in Figure 4-5 above, you use the location navigation pane to identify the CIs at a particular location. Having found the CI you are interested in, you highlight it in the base pane to view a list of all service calls registered against the CI in the service calls leaf pane.

## Using Card Views

Card views display information as a card index. Each item appears as an individual card. Each line in the card shows a detail of the item.

You can use a card view to quickly retrieve or view items that you can arrange in alphabetical order, such as information about employees:

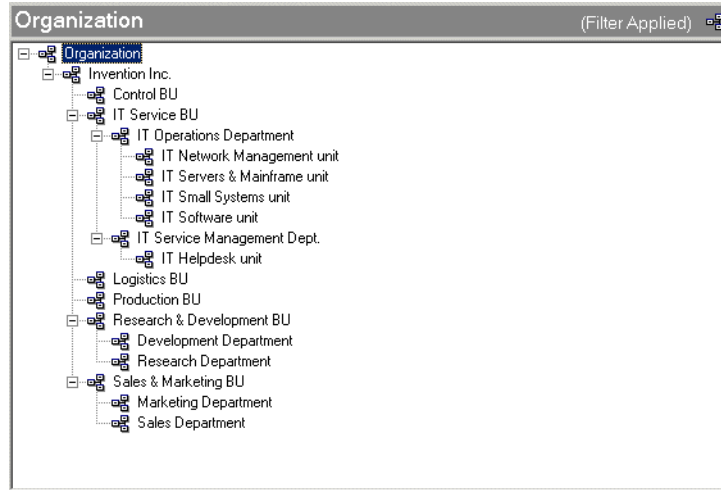
**Figure 4-6** Card View: Personnel



## Using Tree Views

Tree views display information in a format similar to the navigation pane of the explorer view. Tree views are useful for displaying structured information, such as departments within organizations.

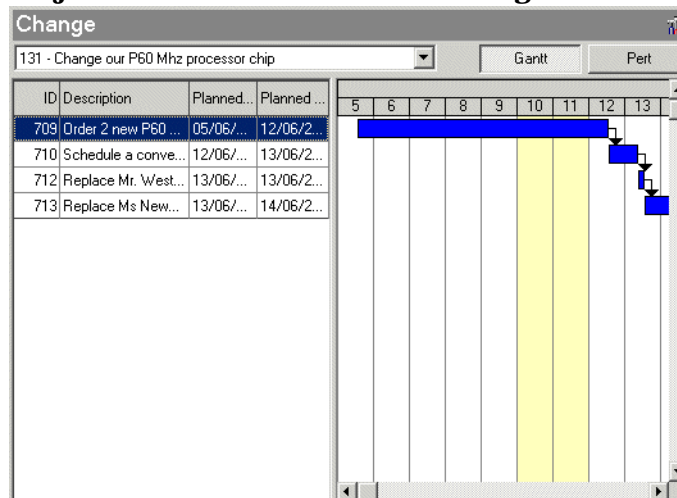
**Figure 4-7** Tree View: Organization Structure



## Using Project Views

Project views provide overviews of coordinated activities. You can display information about the work orders that are grouped together into a change item, or the change items that are grouped together into a project. The project view lists the activities, and displays the planned progress graphically, either in a Gantt chart or a Pert chart:

**Figure 4-8** Project View: Work Orders in a Change Item

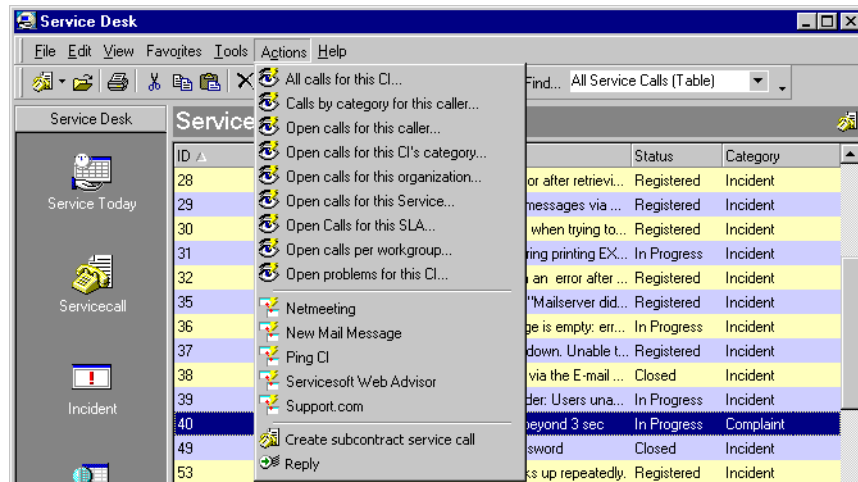




## Using the Actions Menu

The **Actions** menu provides shortcuts to tasks related to Service Desk items. The following figure shows an example Actions menu for service call items:

**Figure 4-9** Service Call View: Actions Menu



The Actions menu contains three types of actions:

- Smart link actions

Smart link actions start external programs. The external program may be called with information passed from the currently highlighted or opened item. For example, Microsoft Word may be opened to create a text file using the ID of the currently opened service call as the name for the Microsoft Word file.

- Overview actions

Overview actions open table views of other items. The information in the opened table view can be filtered to display information related to the currently selected or opened item.

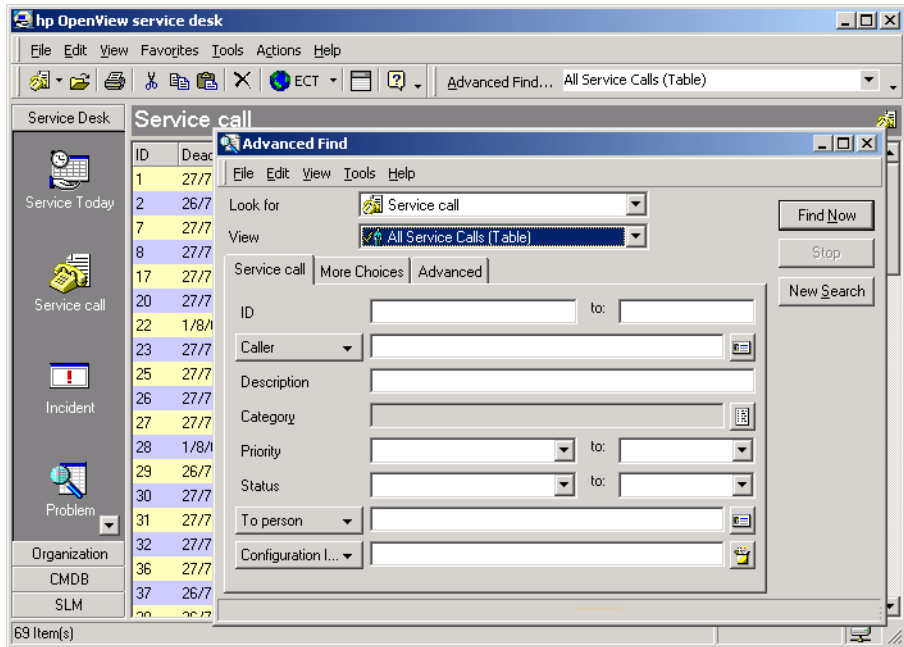
- System actions

System actions are actions defined by the developers of Service Desk to perform complex actions that cannot be performed any other way. Creating subcontract service calls is an example of a system action.

## Using Advanced Find

With Advanced Find you can specify complex search criteria to find items stored in Service Desk. The following figure shows the Advanced Find dialog box opened ready to enter search criteria for service calls:

**Figure 4-10** Service Call View: Advanced Find

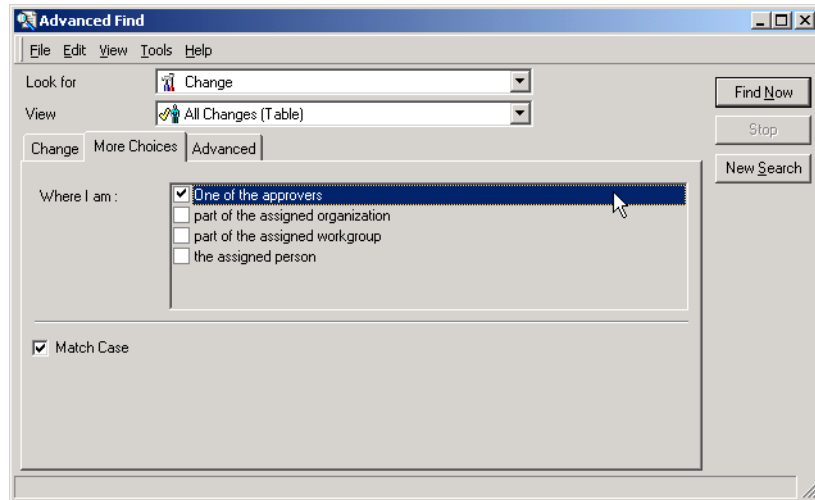


The first tab page of the Advanced Find dialog box contains fields that enable you to perform the most common searches. For example, you can search for service calls raised by a particular caller.

The More Choices tab page provides search criteria associated with the Service Desk user performing the search. For example, a Service Desk user can search for all change requests for which the Service Desk user is an approver:

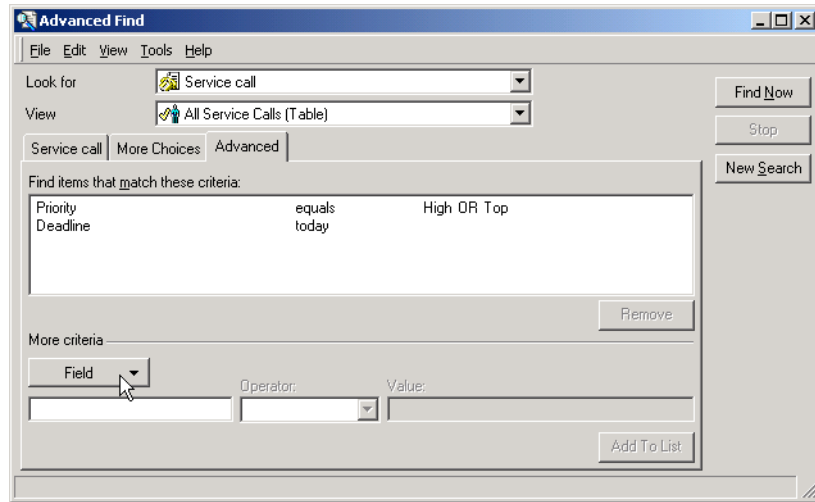
Figure 4-11

### Advanced Find: More Choices



The Advanced tab page supports the most complex search criteria. For example, you can search for all top- or high-priority service calls whose resolution deadline is due to expire today:

**Figure 4-12**      **Advanced Find: Advanced**

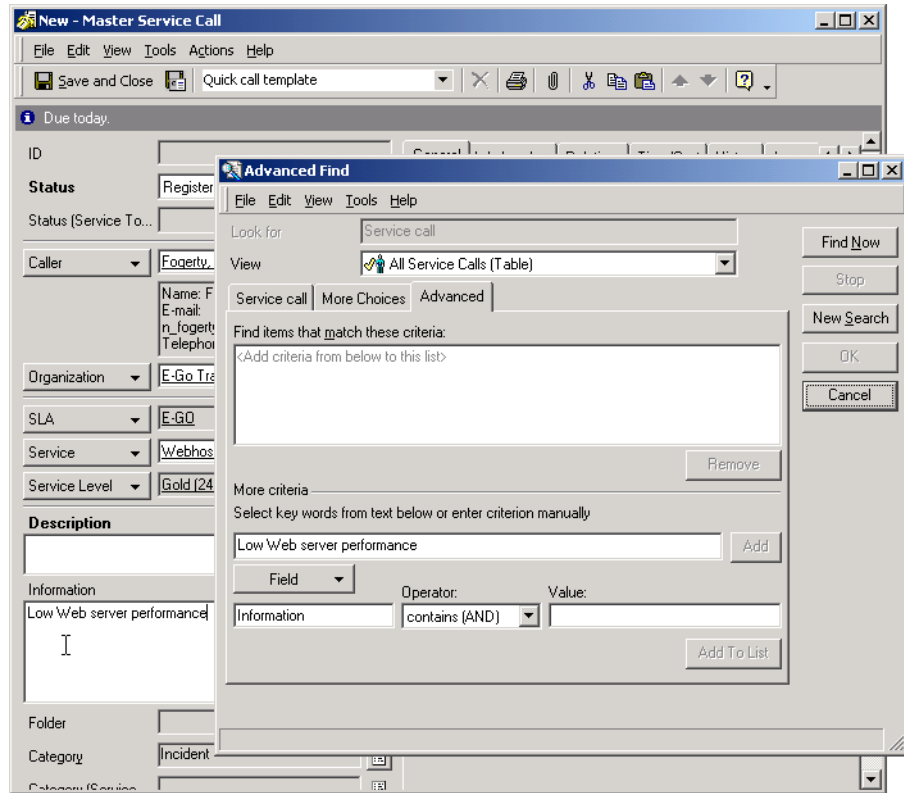


### Scenario: Searching for Similar Service Calls

In the process of registering a service call in which the caller describes low web server performance as a symptom, Robert, a help desk operator, decides to speed up the task by using a similar service call as a basis. He must first find the service call. With the cursor in the `Information` field, Robert presses **F2** to display the Advanced Find dialog box, into which Service Desk copies the contents of the `Information` field:

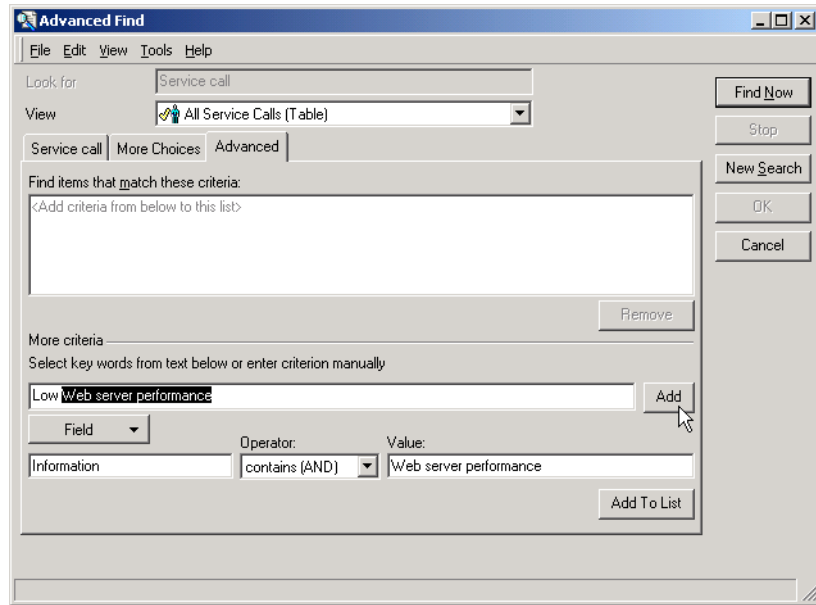
Figure 4-13

### Initiating the Search



Robert then selects the phrase “Web server performance” (other service calls may have used adjectives other than “low” to describe the performance), and clicks the Add button. The phrase is added to the Value field:

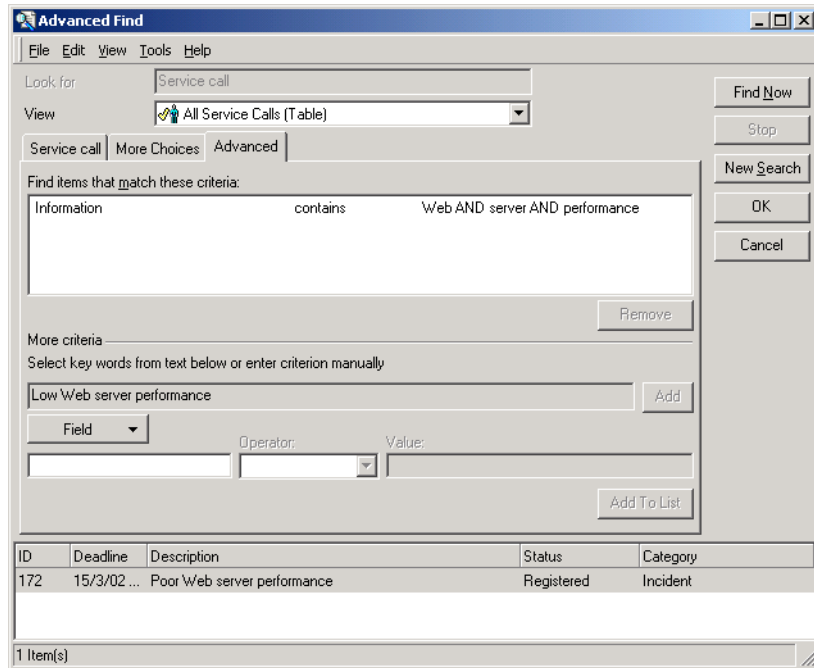
**Figure 4-14** Adding a Phrase to the Value Field



Robert clicks **Add To List** to add the condition to the list of search criteria, then clicks **Find Now** to start the search. One matching service call is found, and this is displayed at the bottom of the **Advanced Find** dialog box:

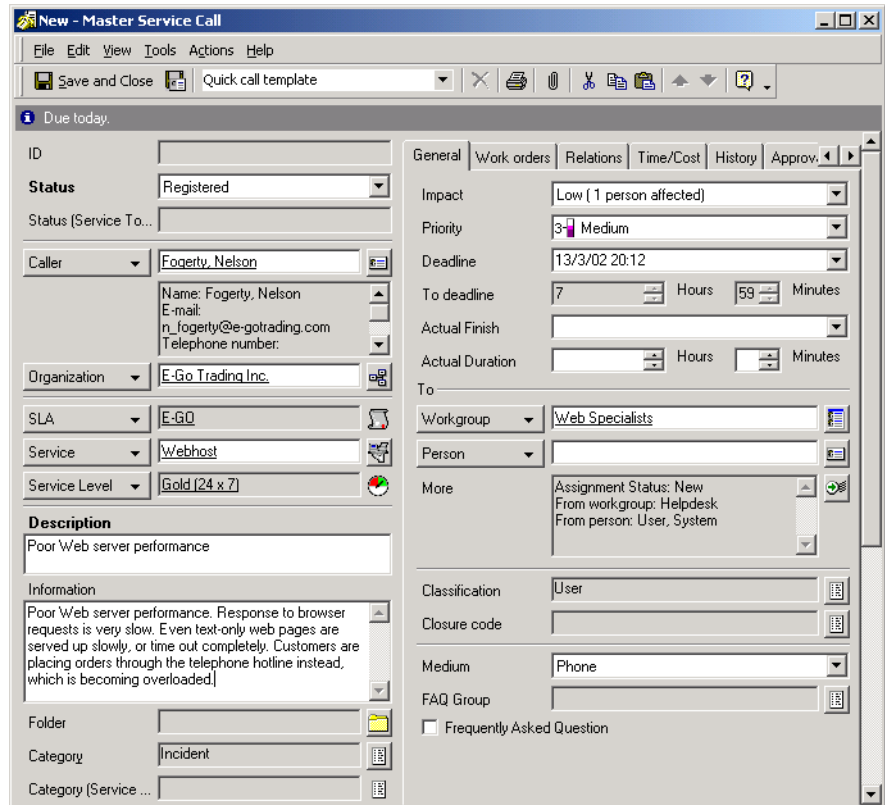
Figure 4-15

### Running the Search and Displaying the Result



Finally, Robert selects the retrieved record and clicks OK. Fields are copied from the retrieved record and pasted into the new service call:

**Figure 4-16** Pasting Fields into the New Service Call



---

**NOTE**

Settings in the Administrator Console determine which fields are copied from an item.

Robert can now edit any of the fields, as required.



---

# **5** **Customer Tasks**

This chapter outlines the process of reporting service calls and verifying their status.

## **Scenario: Registering a Service Call**

Sarah Clark, an employee of your company, is experiencing problems with Microsoft Outlook. She is unable to view the global address list.

She has accessed the Service Pages on the IT department's intranet as well as the Frequently Asked Questions (FAQs) but is unable to resolve the problem.

### **What is the Solution?**

Sarah can contact your help desk in several ways to receive assistance.

She can call, fax or notify you via e-mail. Sarah chooses to log a call using Service Pages. By using Service Pages, she immediately receives an ID number for her reported service call, and can track the progress of her service call with her HTML browser.

## **Administering Service Calls**

The ultimate goal of service users is to receive prompt resolution of their IT infrastructure issues. Service users can quickly report issues in a variety of ways:

- E-mail
- HTML browser (Service Pages)
- Phone
- Fax

## **Registering Service Calls**

The function of a help desk is to resolve the support requests raised by customers. Basic information must be communicated before help desk personnel can perform effectively.

Regardless of the medium customers use to request support, they should be prompted to report basic information such as:

- Caller's name
- Affected configuration item
- Exact description of the issue
- How many people are affected (one person, group, department or organization)

## **Using Service Pages (SP)**

Using an HTML browser, a customer can report service calls as well as view possible solutions in FAQs (Frequently Asked Questions). Customers can also view the solutions to the service calls they report.



---

## **6 Help Desk Personnel Tasks**

This chapter describes the functions and menus a help desk operator can use when opening and tracking service calls. An outline of the process of handling service calls while connected to Service Desk is provided.

## **Scenario: Help Desk Operator Intervention**

Your human resources department has just hired a new employee, Sam Thomas, and passes the new employee service request to the service desk via e-mail. You open Service Desk and create a new service call using the new employee template.

The new employee template automatically generates a number of work orders using pre-defined templates. The work orders are automatically assigned to the appropriate IT departments, and include tasks such as placing a desk and computer, creating an e-mail account, creating Internet connections and installing software.

Sam Thomas is unable to create a request using Service Pages (SP) as he is a new employee and does not (yet) have Internet access.

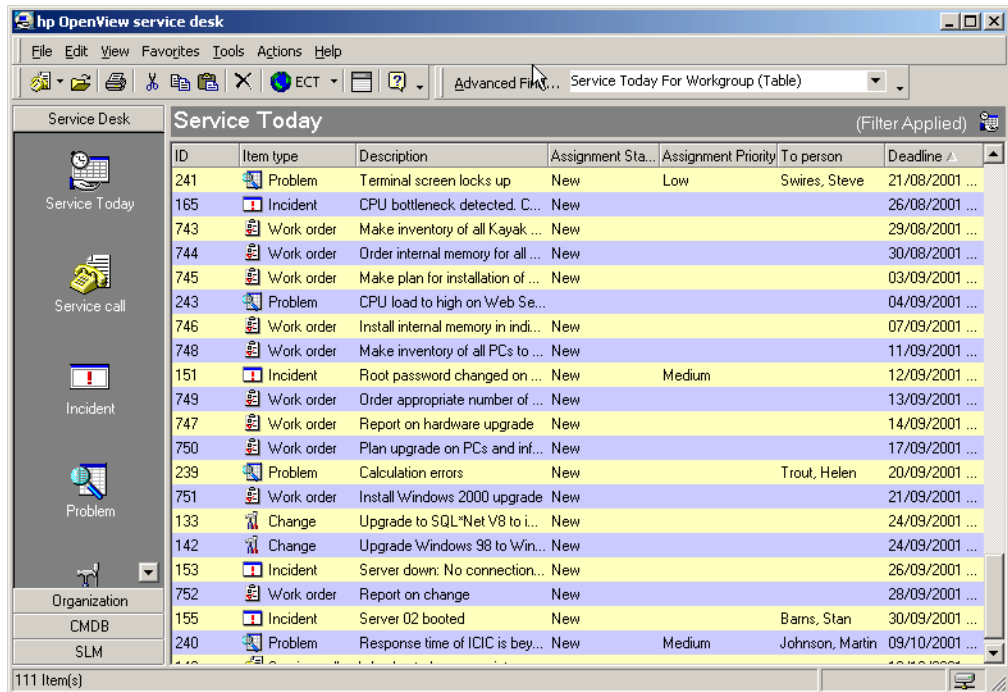
By using Service Desk, most processes required for Sam to begin his responsibilities are automated after the help desk operator has been contacted.

## Overview of Help Desk Operator Tasks

The help desk operator's primary task is to provide solutions as soon as possible for people with IT infrastructure issues. You are the first line of contact for customers requesting support. You must balance the tasks of registering customers' calls and providing solutions. If you are unable to provide a solution, the information you receive must be used to alert specialists.

As a help desk operator, you use predefined views (for example, to monitor the status of a CI), and use the appropriate tools defined by the Application Administrator. After logging into Service Desk, a help desk operator may begin with the following console:

**Figure 6-1** Service Today View for the Help Desk Workgroup



## **Administering Service Calls**

Service calls are registered requests from customers to do one or more of the following:

- Solve an incident
- Change some aspect of the service
- Provide information

## **Registering Service Calls**

The Service Call form is used for registering service calls:



Figure 6-2

### New Service Call

Your IT infrastructure management may decide to use the supplied default template or create a similar template with dedicated requirements for your organization.

When registering a service call, gathering essential information is crucial to resolution. The information you enter is not only used by the specialists resolving the service call but may be accessed by the change manager, problem manager, configuration manager, and persons and organization manager. Checklists (see “Running a Checklist” on page 98) are a convenient way of gathering information from the caller.

The following fields are always mandatory:

- Description

An accurate description of the exact issue must be logged. From this description, the specialists can begin resolving the service call.

- Status

Clicking the arrow next to the `Status` field displays a list of statuses that can be applied to the new service call. You cannot enter a free text response but must select from the list. The list is administered by the Service Desk system administrator. For example, you can indicate that a service call has been registered by selecting `Registered` from the list.

---

**NOTE**

Other fields may also be mandatory, as determined by your IT infrastructure management in cooperation with the Service Desk system administrator. By default, mandatory fields are displayed in a bold font. You can change the appearance of mandatory fields to help identify them.

---

## Running a Checklist

Checklists are questionnaires created by your system administrator. You can use checklists when registering service calls. Each checklist contains a set of standard questions that a caller can be asked. You can log the answers given by the caller, and checklists can include suggestions and solutions based on the answers given. When the questionnaire is completed, the log is automatically copied into the `Information` field of the service call, where specialists can view the information.

## Viewing Service Calls

Service calls can be accessed and viewed in a variety of ways from within the Service Desk console. You can display service calls from the `Service Today` or `Service Call` data views. Alternatively, you can view service calls in the following ways:

- Choosing an overview action from those available on the `Action` menu. For example, while viewing a list of all CIs, you can choose an overview action to display all service calls reported on the currently highlighted CI.
- Choosing `Advanced Find`.

For additional information on using the `Action` menu or `Advanced Find`, please refer to `Service Desk Online Help`.

## Updating Service Calls

When you view service calls, you can also update the records with additional information. Examples of situations where you might need to update the record are:

- Assigning specialists
- Modifying contact information
- Recording your attempts to resolve the service call
- Changing the status of a service call

If you are unable to provide first-line support, you should dispatch the service call to a specialist. For further information on dispatching a service call, please refer to Service Desk Online Help.

## Creating Subcontract Service Calls

If analysis reveals that you need to apply to another service provider to resolve the root cause of a service call or incident, you can create a subcontract service call. Service Desk automatically copies information from the original event, and registers you as the caller. For further information, please refer to Service Desk Online Help.

## Closing Service Calls

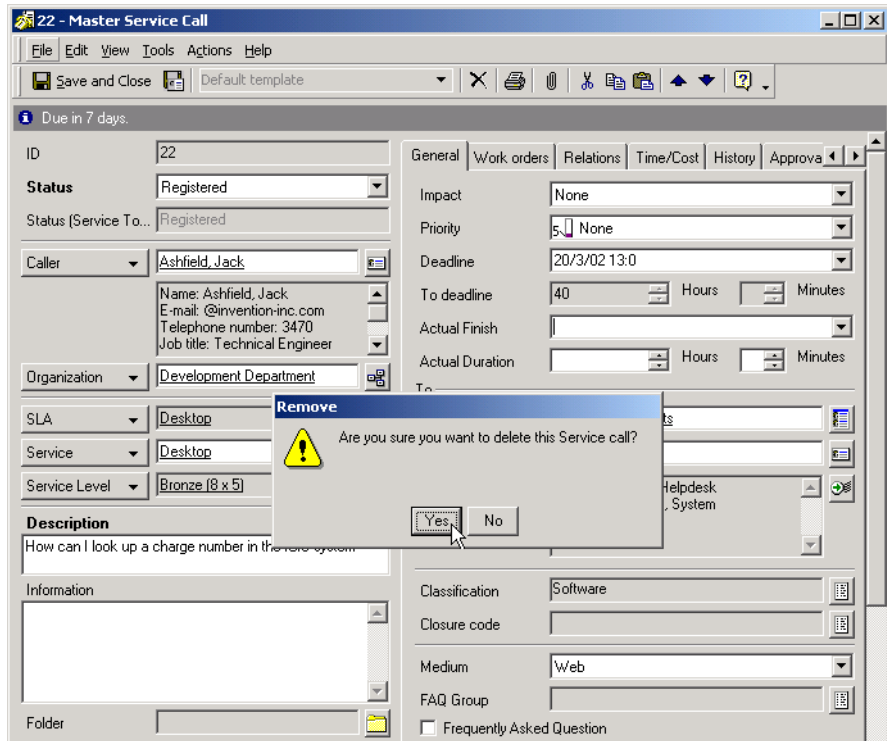
Occasionally, you may be required to close service calls to maintain the integrity of your help desk management policies. This may need to be done if, for example, a customer has reported a service call in error. As the request is an error and does not require intervention from a specialist, you may be asked to close the call.

Your IT infrastructure management team determines when you should close such calls. You may address duplicate calls in one of two ways:

- Deleting the service call record

If your management team determines removing the record entirely from Service Desk is appropriate, please use this option with care. The record is permanently deleted from Service Desk by using **CTL+D**. If the user later contacts you with the same request, you will be required to create a new service call. The following figure displays an example service call record deletion:

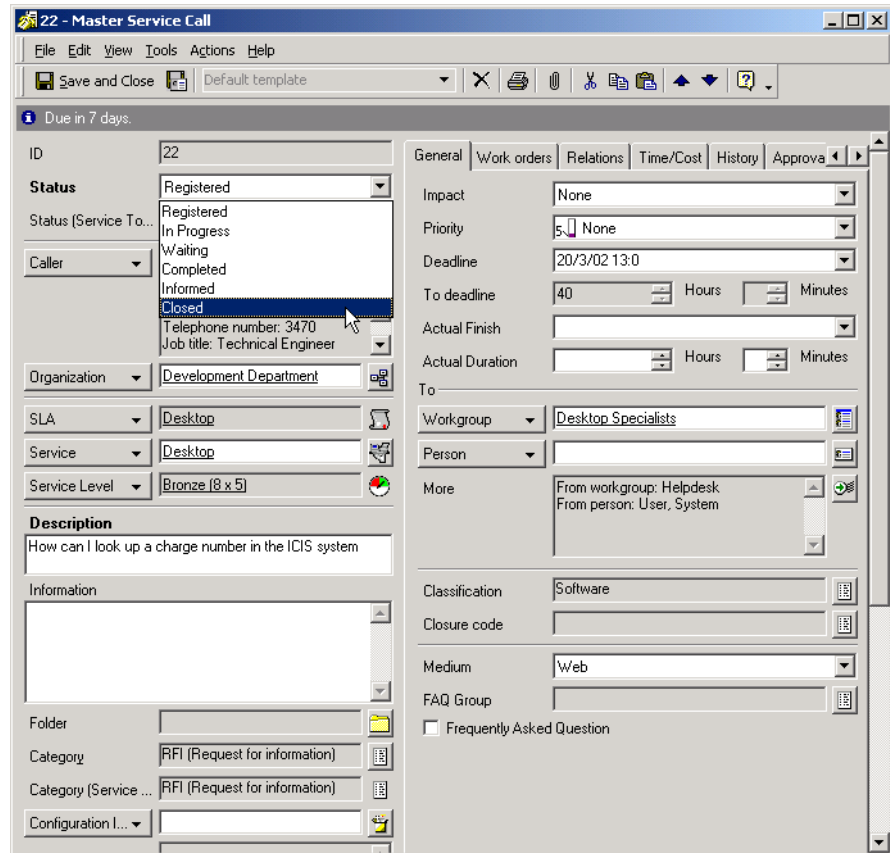
**Figure 6-3** Service Call Deletion



- Changing the status to closed

If your management team determines changing the service call status to Closed is appropriate, supplying a reason in the Solution field may be advisable. You should also close any work orders that are related to the service call. The following figure displays an example service call closure.

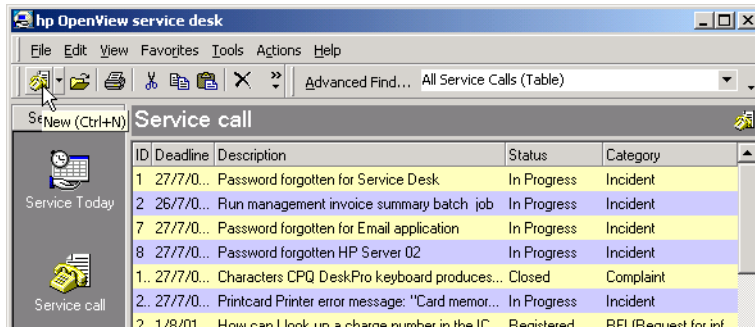
**Figure 6-4** Service Call Closure



### Scenario: Service Call Creation

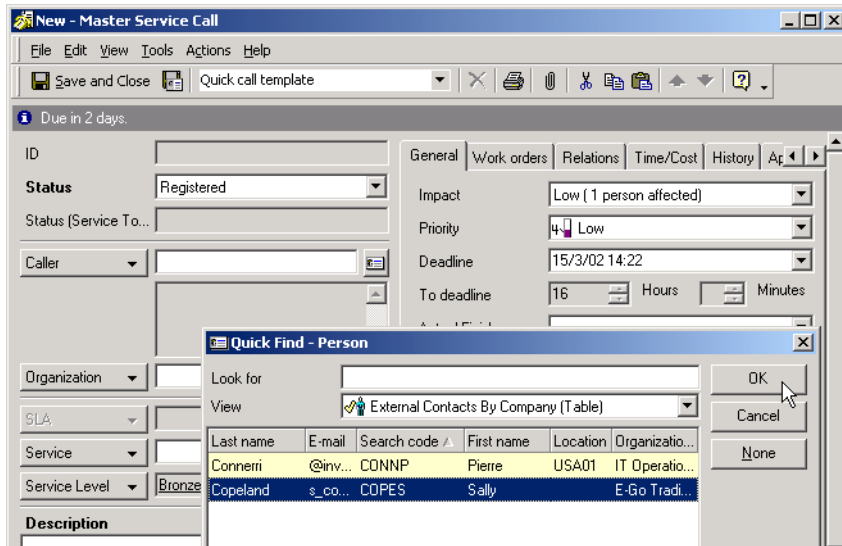
John, a help desk operator, takes a phone call from a customer requesting support. John opens a new service call using the default form and template:

**Figure 6-5** New Service Call Using Default Form and Template



John starts by identifying the caller. This helps to confirm that the caller is a customer with a valid service level agreement. The caller identifies herself as Sally Copeland. John types the first few characters of the surname, then presses the TAB key. Service Desk finds more than one name that matches the search string, and displays them in a Quick View dialog box:

**Figure 6-6** Identifying the Caller

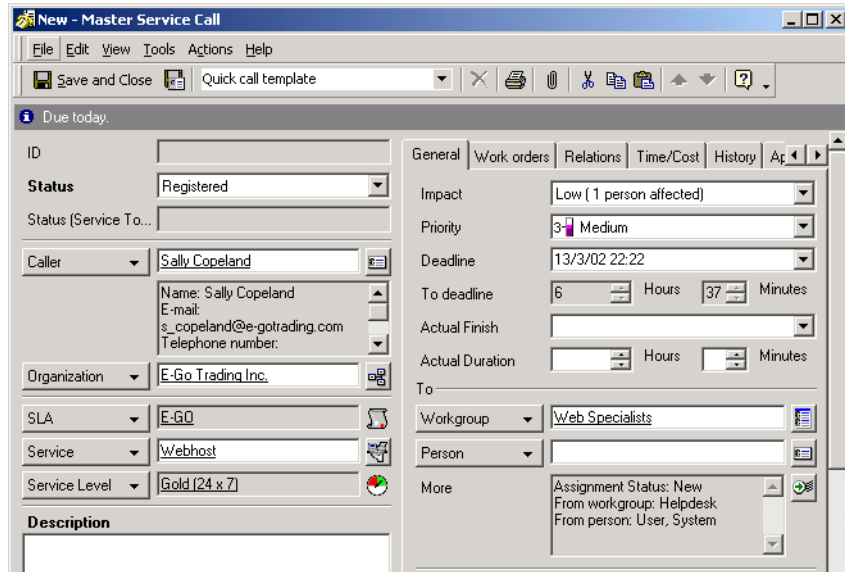


After confirming her organization as E-Go Trading Incorporated, John selects the correct caller name from the list and clicks OK. Service Desk finds only one service for which the caller or the caller's organization is a service receiver with a service level agreement, and so these details are automatically inserted in the appropriate fields, together with the

service level applicable to the SLA. Because the SLA covering the provision of the web hosting service for E-Go Trading specifies a default support entity (the Web Specialists group within the IT services unit of Invention Incorporated), Service Desk assigns responsibility for resolving the service call to this group:

**Figure 6-7**

**Registering Service Details**



John now asks the caller to explain the reason for the call. He types the information into the Information field, and supplies a brief summary in the Description field:

**Figure 6-8**

**Describing the Problem**

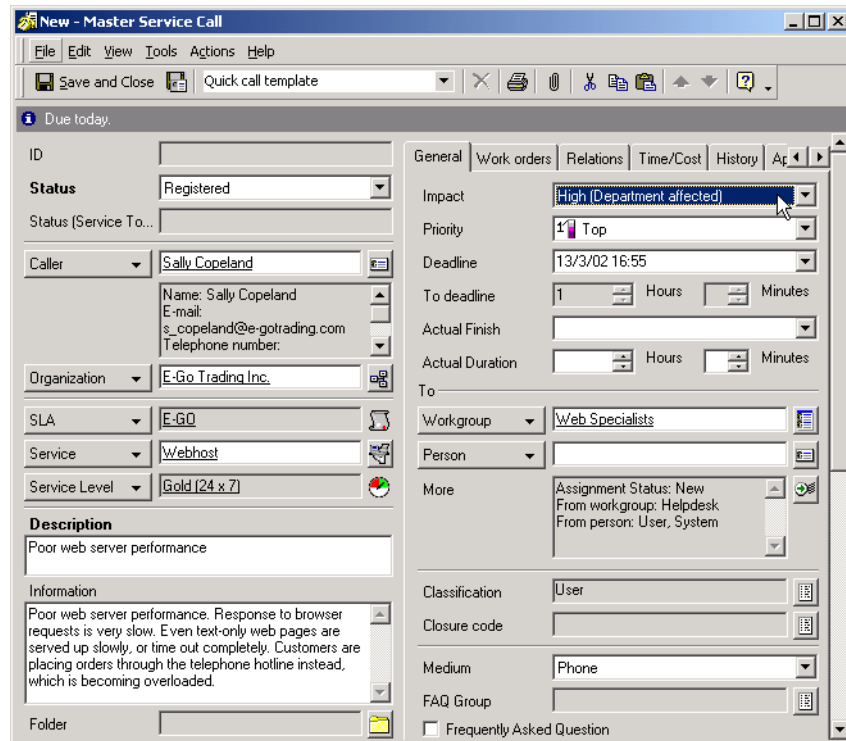
SLA	E-GO	Workgroup
Service	Webhost	Person
Service Level	Gold (24 x 7)	More
<b>Description</b>		
Poor web server performance		
<b>Information</b>		Classification
Poor web server performance. Response to browser requests is very slow. Even text-only web pages are served up slowly, or time out completely. Customers are placing orders through the telephone hotline instead, which is becoming overloaded.		Closure code
Folder		Medium
		FAQ Group
		<input type="checkbox"/> Frequently

After discussing with the caller the extent to which the service is being impaired, John assigns a high impact code to the service call. The impact-priority mapping defined in the service level (Gold 24x7) automatically allocates the highest (Top) priority code, which in turn applies a maximum resolution duration of one hour. Service Desk automatically sets the deadline accordingly, taking service hours and time zones into consideration:



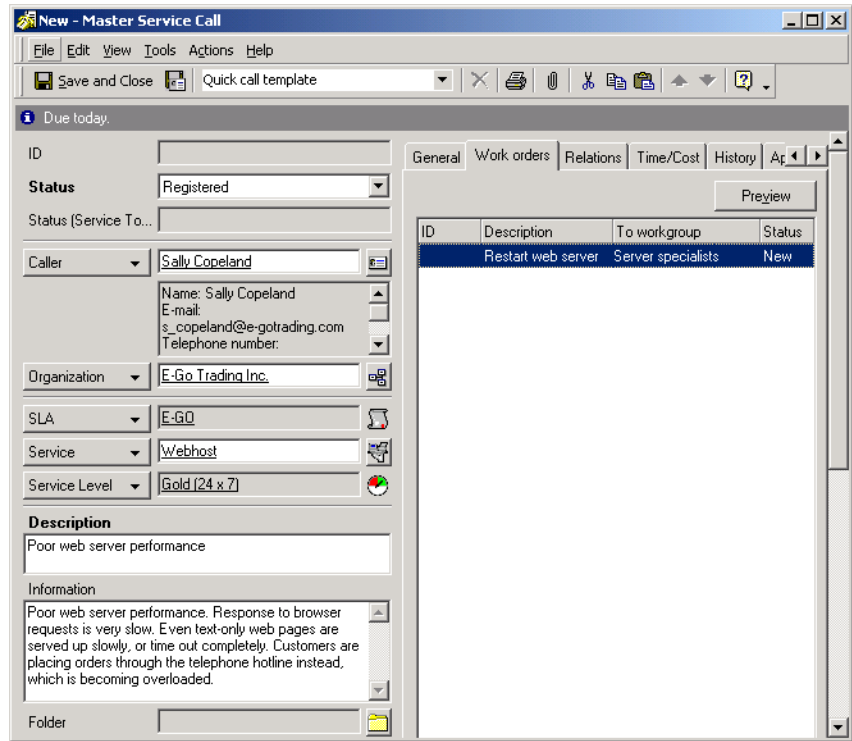
Figure 6-9

### Setting the Impact



John knows that the help desk's standard response to symptoms of this type is to have the server restarted. John adds a work order to the service call to perform this action, and assigns it to the Server specialists workgroup:

**Figure 6-10** Request to Restart the Web Server



Finally, the service call is saved and the form is closed. At this point, the service call appears in the Service Today data view of the Server specialists group, which has been assigned the task of resolving the service call.

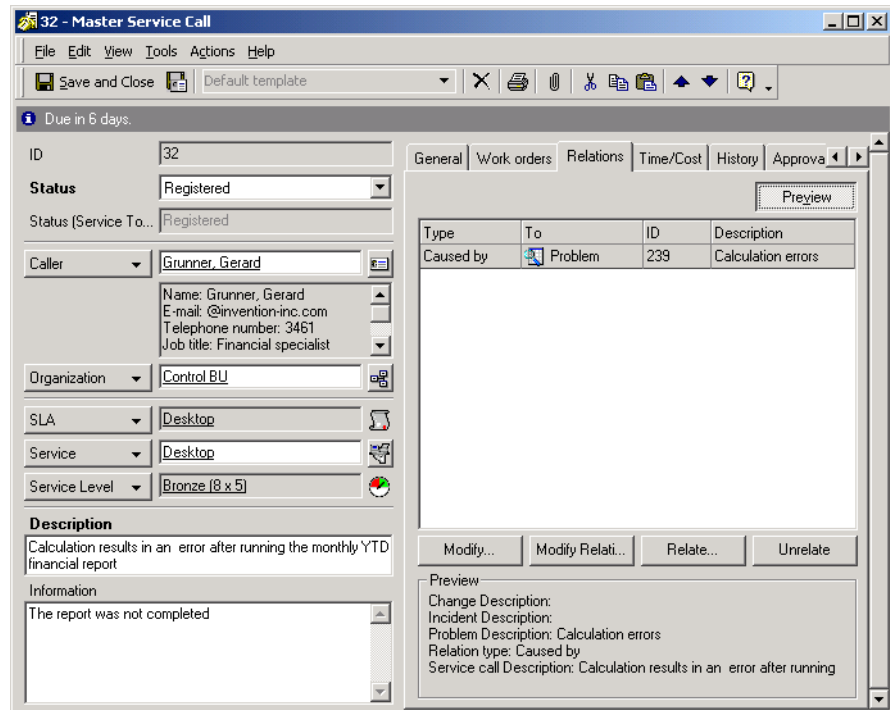
## Relating Service Desk Processes

By indicating any Service Desk items (for example, problems and changes) to which a service call is related, you help specialists to resolve IT infrastructure issues.

When you relate a service call to another Service Desk item, the information is linked and the IT specialists, in cooperation with the problem or change manager, can begin action:

**Figure 6-11**

### Service Call Relation



## Identifying Related Service Desk Roles

Your role as help desk operator interacts with the following Service Desk roles:

- **Specialists**  
The service calls you are unable to resolve are usually assigned to specialists.
- **Configuration manager**  
The configuration manager classifies the assets in the IT infrastructure. The configuration manager determines the format for search codes which identify CIs that you create service calls for.
- **Problem manager**  
The service calls you report are reviewed by the problem manager to identify recurring incidents.
- **Change manager**  
The service calls you register are reviewed to identify changes both proactively and reactively. In addition, you may be required to notify customers of the impending changes to their CIs.
- **Service level manager**  
Service level agreements determine the level of support and service a customer is entitled to. The service level manager directly affects the amount of service you, as first-line support, and the specialist are able to provide on a service call.
- **Persons and organization manager**  
IT infrastructure personnel and end-users form the basis of your address list. The persons and organization manager determines the data that humanizes each CI: the service professionals providing assistance and the actual CI owners.

Your tasks as the primary contact person are critical to receive maximum benefit to Service Desk implementation. Without your accurate identification of service call issues and consistent entry of call registration data, the appropriate specialists cannot properly assist end-users in resolving IT infrastructure issues.

---

# 7

## **Configuration Manager Tasks**

This chapter describes the general approach a configuration manager may take when implementing Service Desk. The process of managing Configuration Items is also provided.

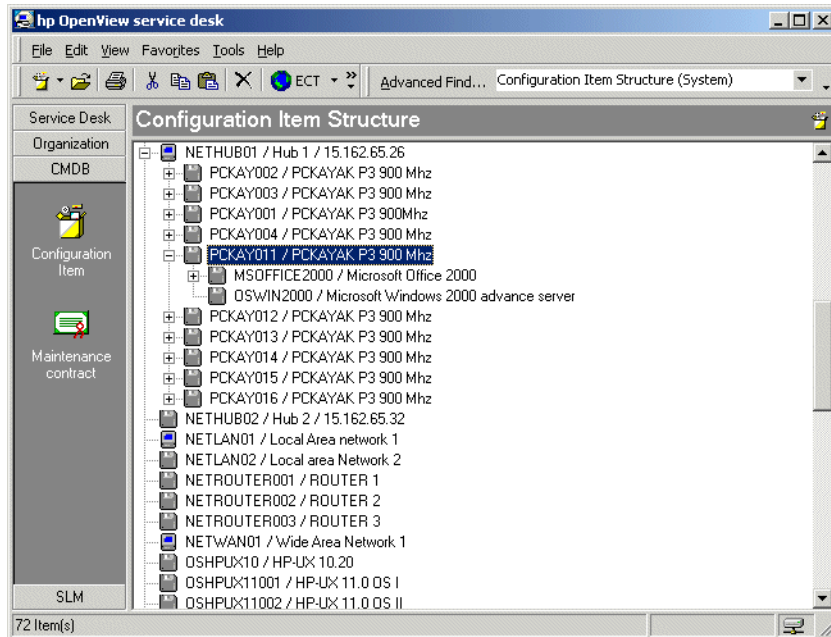
## Administering Configuration Items

Configuration management is a key element of Service Desk. Configuration items include everything that makes up the IT infrastructure, such as networks, mainframes, personal computers, software, and peripherals. As a configuration manager, you define what should be considered a configuration item in your IT infrastructure. Configuration items are managed along with corresponding maintenance contracts in the **configuration management database (CMDB)**.

Figure 7-1 displays the CMDB console. The CMDB group in the shortcut bar contains icons that display information about configuration items and information about the maintenance contracts from the suppliers of CIs:

Figure 7-1

### CMDB Console



## Categorizing Configuration Items

What is relevant in your IT infrastructure? Although one configuration manager may, along with mainframes and personal computers, consider mouse devices, digital cameras and mouse pads to be CIs, another configuration manager may decide that only mainframes and personal computers should be considered CIs.

---

### NOTE

When determining the level of detail for CIs, remember that a consistent and highly detailed system of CIs can assist in pinpointing IT service failures. For example, if a personal computer cannot run a program because of insufficient RAM, identifying the RAM for an upgrade would be preferable to identifying the personal computer. If both the personal computer and the RAM are separate CIs, the upgrade could be scheduled with minimal costs.

---

## Registering Configuration Items

You can register configuration items in the following ways:

- Using the New Configuration Item form
- Using the Generate CI wizard

### Using the New Configuration Item Form

If you need to create a small number of configuration items or if the configuration items have little or nothing in common, use the New Configuration Item form:

**Figure 7-2** New Configuration Item

The screenshot shows the 'New - Configuration Item' dialog box. The 'General' tab is selected, displaying various fields for configuration item registration. The 'Search code' field contains 'LAN01', and the 'Status' is set to 'Production'. The 'Name 1' field contains 'Local area network'. The 'Category' is set to 'Hardware / Network / N'. The 'Unique' checkbox is checked, and 'Max. Installations' is set to '1'. The 'General' tab also shows fields for 'Location' (EUR001), 'Brand', 'Owner Person', 'Owner Organiz...', 'Administrator P...', 'Administrator ...' (Network Specialists), 'Administrator ...' (IT Operations Department), 'Outsourced to', and a 'Remark' text area.

When creating CIs, the following fields are always mandatory:



- Search code

Determining a naming system for your search code enables other users to quickly identify each unique CI.

If your organization already has a naming system in place for CIs, Service Desk allows you to integrate that naming system into the search codes. Your contact persons, users, specialists and IT infrastructure managers can identify CIs with a system they are familiar with. If your naming convention requires unique CIs to have unique search codes, Service Desk can ensure that this convention is enforced.

- Status

Clicking the arrow next to the `Status` field displays a list of status codes that can be applied to the new CI. Service Desk users creating new CIs cannot enter a free text response but must select from the list you have determined in cooperation with the Service Desk system administrator. For example, you can indicate that a CI has been ordered by selecting `Ordered` from the list.

- Maximum Installations

Shows the maximum number of allowed installations of a non-unique CI. For unique CIs, this value is automatically set to 1.

---

**NOTE**

Other fields may also be mandatory, as determined by your IT infrastructure management in cooperation with the Service Desk system administrator. By default, mandatory fields are displayed in a bold font. You can change the appearance of mandatory fields to help identify them.

---

## Using the Generate CI Wizard

If you need to register batches of similar or identical configuration items, use the Generate CI wizard. The wizard guides you through the process step-by-step, from specifying the template through to specifying the format for the search codes. Upon completion, you can view a summary report of the configuration items created, including details of configuration items that could not be created. For instructions on using the Generate CI wizard, please refer to Service Desk Online Help.

## Viewing Configuration Items

Viewing CIs is made easier if you have created a search code naming system that is used consistently by other Service Desk users.

Configuration items can be accessed and viewed in a variety of ways from within the Service Desk console. You can display CIs from the Configuration Item data view. Alternatively, you can view CIs in the following ways:

- Choosing an overview action from those available on the `Action` menu. For example, while viewing a list of all services, you can choose an overview action to display all CIs managed by the currently highlighted operations management service.
- Choosing an overview action from those available on a lookup item button. For example, while registering a service call, you can choose an overview action to display all CIs used by the caller.
- Choosing `Advanced Find`.

For additional information on using the `Action` menu, lookup item buttons or `Advanced Find`, please refer to the Service Desk Online Help.

## Updating Configuration Items

When you view CIs, you can also update the records with additional information, provided that your assigned user role gives you permission to do so. Examples of situations where you might need to update the record are:

- Change of ownership
- Modifying contact information
- Change of status

You can use work orders to plan the automatic updating of CIs. For details, please refer to “Updating CIs According to Work Orders” on page 146.

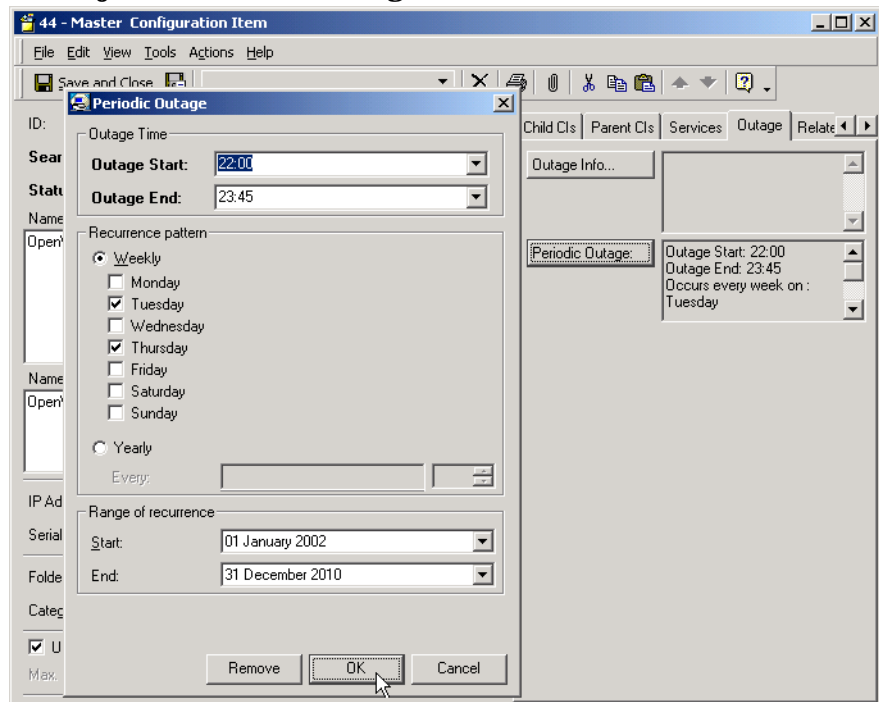
## Specifying Periodic Outages

You can specify details of periodic (recurring) outages for a CI. Periodic outage planning has the following benefits:

- Help desk staff can respond to service calls registered during a periodic outage of a CI. Callers can be informed of the outage, and can be given an indication as to when the CI is due to become available again.
- Information about periodic outages can be used to suppress 'node down' messages in OpenView Operations, as described in "Passing Outage Information to OpenView Operations" on page 145.

If a CI undergoes an occasional (incidental) planned outage, this information can be registered in the work order for the work involving the outage, as described in "Planning Occasional Outages" on page 143.

**Figure 7-3** CI Subject to Periodic Outage



## Deleting Configuration Items

Deleting configuration items is relatively simple, but you should do so with care. When deleting a CI, remember the importance of the relations you have created. If the CI is related to another CI, the deletion of one of the CIs may cause problems. For example, a user is experiencing problems with his computer not operating properly. Despite specialists attempts, the computer is deemed inoperable and replaced. When you attempt to delete the CI, a message may appear reminding you that the record is still related to a service call. As a result, you must first remove the reference to the computer from the service call record before removing it from the CMDB.

## Relating Configuration Items

Configuration Item entries should not only contain specific information about each asset present in your IT infrastructure but should also explain relationships between different CIs. If you have identified a computer as a CI and the corresponding monitor as a CI, the computer will be affected if the monitor fails to work and vice versa. The relationship between these two CIs needs to be expressed. With Service Desk, this relationship can be expressed in several ways.

Each CI can be a component of another CI by establishing a parent-child hierarchy. In our example of the monitor and the computer, the computer could be identified as the parent and the monitor as the child. In parent-child relation types, a child cannot operate properly without the parent. This type of relation creates a hierarchy between CIs.

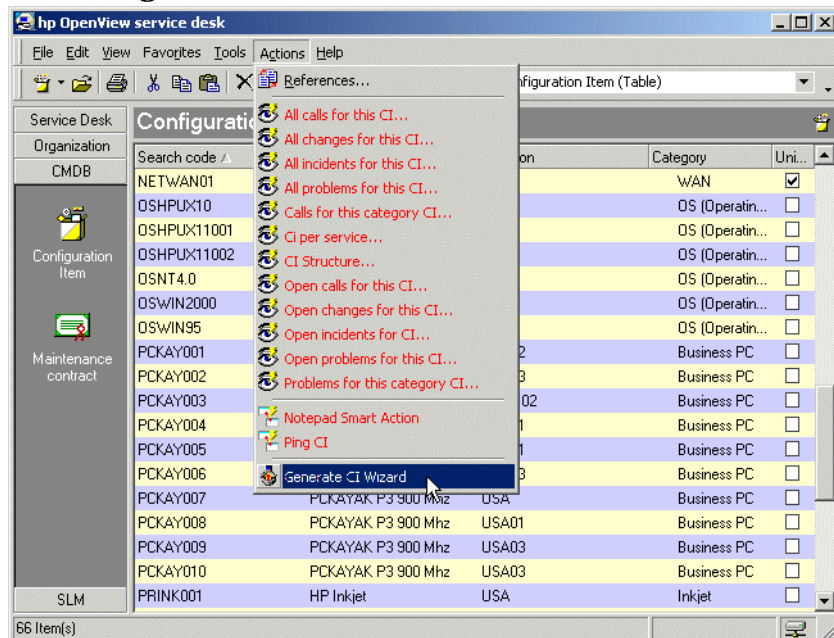
You can also establish relationships between CIs without a hierarchy. By establishing a direct relationship between CIs, they are on the same level. An example of a relation would be between a personal computer and a network laser printer. The personal computer and laser printer are equal because they can function properly without each other.

## Scenario: Registering a Batch of PCs

Patrick Sharp, a configuration manager at Invention Incorporated needs to register a new batch of six PCs placed on order by the development department. He chooses to use the Generate CI Wizard.

Figure 7-4

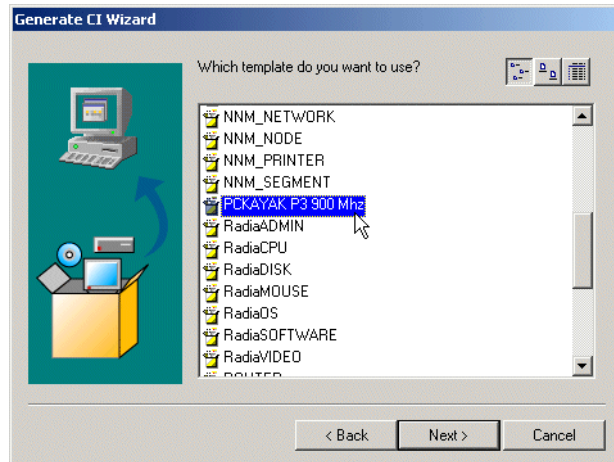
### Launching the Generate CI Wizard



He chooses a pre-existing template that has been set up to store most of the characteristics of the type of PC on order (Hewlett-Packard Kayak PCs):

**Figure 7-5**

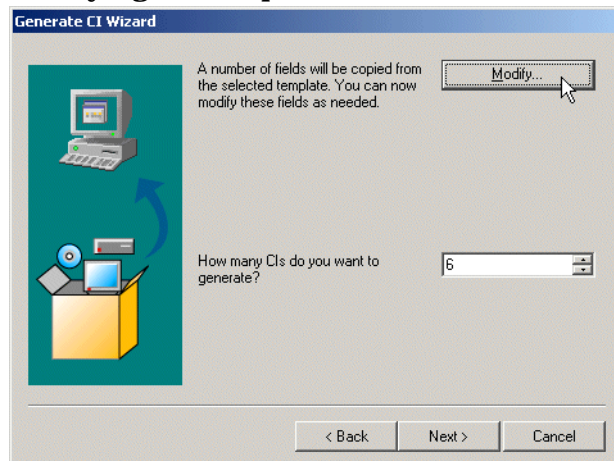
**Selecting the correct template**



He then specifies the required number of CIs (six), and opens the template in a form so that he can change settings that apply to this particular batch of PCs:

**Figure 7-6**

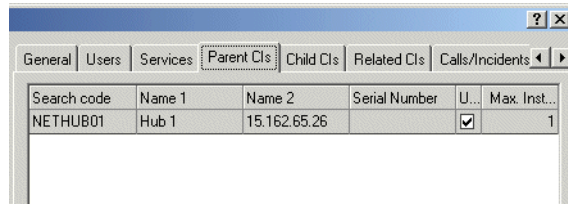
**Modifying the template**



Specific settings for this batch of PCs include the parent (the PCs are to be added to network hub 1)

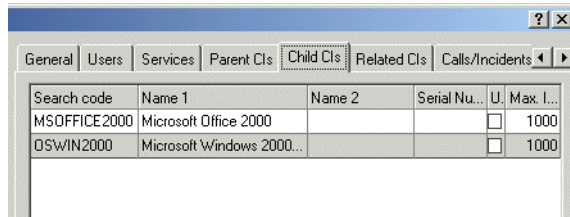


**Figure 7-7** Specifying the parent CI



Each PC will be delivered with a particular operating system and pre-installed software, and these are linked as child CIs:

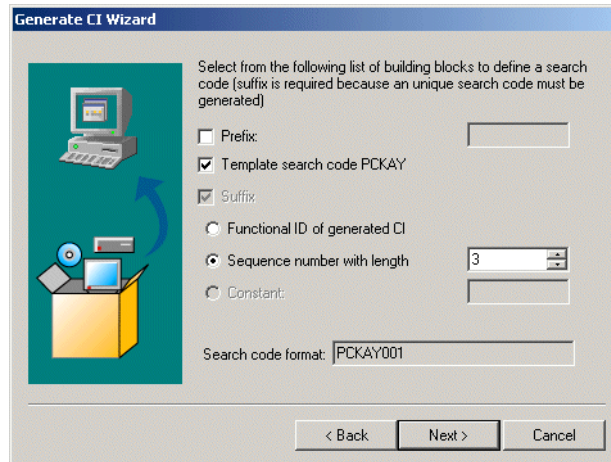
**Figure 7-8** Specifying the child CIs



The search codes for this batch of PCs are to continue the existing search code pattern (PCKAYnnn):

**Figure 7-9**

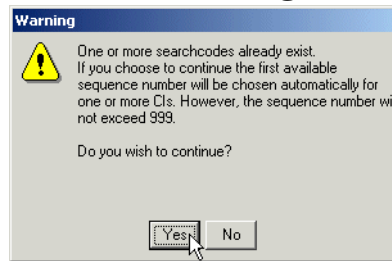
### Specifying the search codes



Because the search code numbering system is already in use, and the option to enforce unique search codes is selected as a general setting, Service Desk displays a warning message indicating that numbering will not begin from 001, but from the first available number:

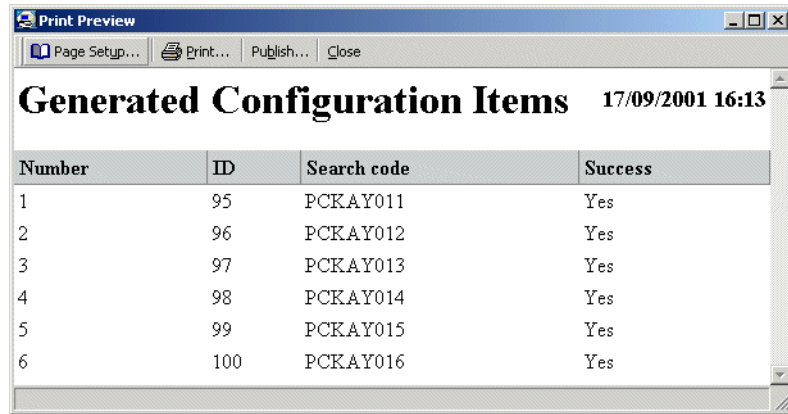
**Figure 7-10**

### Search code warning



After the CIs have been created, Patrick views the CI creation report:

**Figure 7-11** Viewing the CI creation report

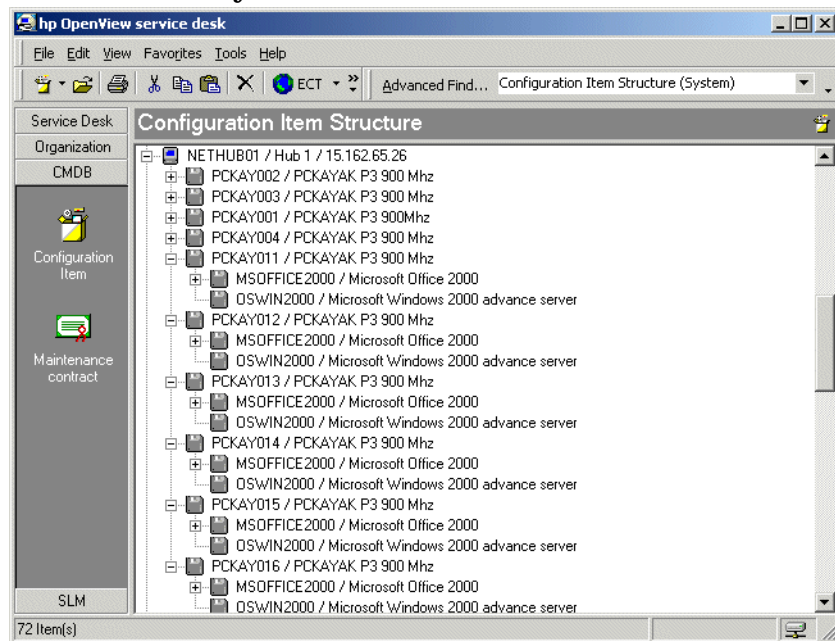


The screenshot shows a 'Print Preview' window with a table titled 'Generated Configuration Items' dated '17/09/2001 16:13'. The table has four columns: 'Number', 'ID', 'Search code', and 'Success'. It lists six items, all with a 'Success' status of 'Yes'.

Number	ID	Search code	Success
1	95	PCKAY011	Yes
2	96	PCKAY012	Yes
3	97	PCKAY013	Yes
4	98	PCKAY014	Yes
5	99	PCKAY015	Yes
6	100	PCKAY016	Yes

Finally, Patrick views the hierarchy of newly-created CIs:

**Figure 7-12** New CI hierarchy



The screenshot shows the 'hp OpenView service desk' interface. The main window displays a 'Configuration Item Structure' for a system. The hierarchy starts with 'NETHUB01 / Hub 1 / 15.162.65.26' and branches into several configuration items (PCKAY002 through PCKAY016). Each PCKAY item is associated with 'PCKAYAK P3 900 Mhz'. Some PCKAY items are further associated with 'MSOFFICE2000 / Microsoft Office 2000' and 'OSWIN2000 / Microsoft Windows 2000 advance server'. A sidebar on the left shows 'Service Desk' options like 'Organization', 'CMDB', 'Configuration Item', and 'Maintenance contract'. The status bar at the bottom indicates '72 Item(s)'.

## Identifying Related Service Desk Roles

Your tasks as configuration manager directly affect the tasks of most Service Desk roles. Not only will you need to determine which roles have access to CIs and maintenance contracts, you need to ensure that you develop policies and procedures which can be consistently applied.

Service Desk roles you may interact with include:

- **System administrator**  
With the system administrator, you can discuss CI item access, views on data, templates as well as creating additional mandatory fields on CIs that your organization requires. The system administrator will implement your plans as well as determine which roles have access to CI and maintenance contract items.
- **Help desk personnel**  
Help desk operators refer to CIs when registering service calls.
- **Specialists**  
Specialists refer to CIs when resolving service calls and incidents.
- **Change managers**  
The CIs you register are reviewed to identify changes both proactively and reactively. In addition, change managers may contact you regarding changes to CIs and acquisitions of new CIs.
- **Problem managers**  
The CIs you manage will be used by the problem manager in identify recurring incidents.
- **Person and organization managers**  
IT infrastructure personnel and end-users form the basis of your address list. The persons and organization manager determines the data that connects each CI with the service professionals providing assistance and the CI owners.

---

## **8** **Specialist Tasks**

This chapter describes the tasks associated with people involved with delivering service and maintaining service levels.

## Administering Specialist Actions

The Service Desk console is your primary tool for managing and responding to service calls submitted by customers, contact persons, change managers and problem managers. The console enables you to do the following:

- Select open service calls submitted by users
- Respond to incidents
- View CI history and information
- Set the status of a service call
- Set the status of a change request
- Modify existing service calls and incidents
- Enter information on your time expenditure

The Service Desk group contains shortcuts to all processes that you may administer. You can click any of the shortcuts, for example the Service Call shortcut, and a default table of all service calls is displayed. You can click the box at the top of the display to sort the open service calls in either ascending or descending order. You can use the Service Today data view to display all workflow items assigned to you or your workgroup.

For more information on editing or acting on service call processes, refer to the Service Desk Online Help.

## Accepting Service Calls

When a service call has been assigned to your work group for processing, you must carefully detail the steps you have taken to resolve the service call. The primary focus of your time expenditure should be for resolving IT infrastructure incidents, not completing tedious paperwork. Service Desk supports you in this goal; however, basic information that records the work you're accomplishing should be provided.

Describing your work serves these purposes:

- Solutions are supplied directly to the customer
- Solutions may be re-used

- Solutions may be used for preventative action

The following fields are always required:

- Status

There are six default status values. The names can be changed by the system administrator but the functionality will remain the same. Additional statuses can be defined by the Service Desk system administrator. The default status values are: registered, in progress, waiting, completed, informed and closed.

- Description

This field provides an overview of the IT infrastructure issue.

---

**NOTE**

Other fields may also be mandatory, as determined by your IT infrastructure management in cooperation with the Service Desk system administrator. By default, mandatory fields are displayed in a bold font. You can change the appearance of mandatory fields to help identify them.

---

## Viewing Service Calls

You can view selected service calls based on your own criteria, such as by specialist, within the Service Desk console. By using the toolbar, you can view information by:

- choosing an overview action from those available on the **Action** menu;
- choosing **Advanced Find** on the **Tools** menu.

For additional information on using the **Action** menu or **Advanced Find**, please refer to **Service Desk Online Help**.

## Updating Service Calls

When you respond to service calls, incidents, and change requests, you should make the appropriate notations in Service Desk in the work order. The work order contains all the details on the work you have

completed or are requested to complete. For additional information on the steps needed to update a Service Desk item, please refer to the Service Desk Online Help.

In general, when responding to a Service Desk item, you should record all actions taken to support the customer's request. Your solutions and workarounds form the basis of an accurate FAQ. By accessing the FAQ using Service Pages, customers can solve common problems themselves and you can focus your efforts on resolving events.

## **Closing Service Calls**

Depending on the processes within your organization, you may need to close a service call when you have resolved it or discovered a workaround. You should take care in supplying a concise solution on the service call as well as changing the service call status to `Closed`.

In addition, you should complete the work order. If work orders were created and related to the service call, close them before closing the service call. For further information on work orders, please refer to Service Desk Online Help.

## **Creating Subcontract Service Calls**

If analysis reveals that you need to apply to another service provider to resolve the root cause of a service call or incident, you can create a subcontract service call. Service Desk automatically copies information from the original event, and registers you as the caller. For further information on creating subcontract service calls, please refer to Service Desk Online Help.

### **Scenario: Creating a Subcontract Service Call Involving an Operations Management Service Provider**

An incident is created in Service Desk when performance indicators for a database instance exceed the warning threshold. The help desk may already have linked several customer calls to this incident, and the incident may have been assigned to the database management workgroup.

The database management workgroup finds that the poor performance is due to a UNIX® administrator having changed system parameters of the UNIX server on which the instance is running. The database management workgroup implements a temporary solution for the



customers by changing database parameters. The help desk can close the customer calls and can edit the incident to indicate it is being handled, but the incident is not closed at this stage.

The database management workgroup creates a subcontract service call from the incident and assigns it to the workgroup responsible for managing the server. The subcontract service call requests that the UNIX system parameters be reset to their previous values.

When the database workgroup is notified that the system parameter changes have been undone, they reset the database parameters and close the original incident.

### **Scenario: Creating a Subcontract Service Call Involving a Business Service Provider**

An incident is detected on the performance of an Internet service provided to a customer. The root cause is traced to a capacity decrease on the Internet connection service provided by an external service provider.

Internally, a workaround is implemented to redistribute the remaining capacity in order to maintain service levels.

From the incident, a subcontract service call is created and assigned to the provider of the backbone access service requesting restoration of capacity on the Internet connection service.

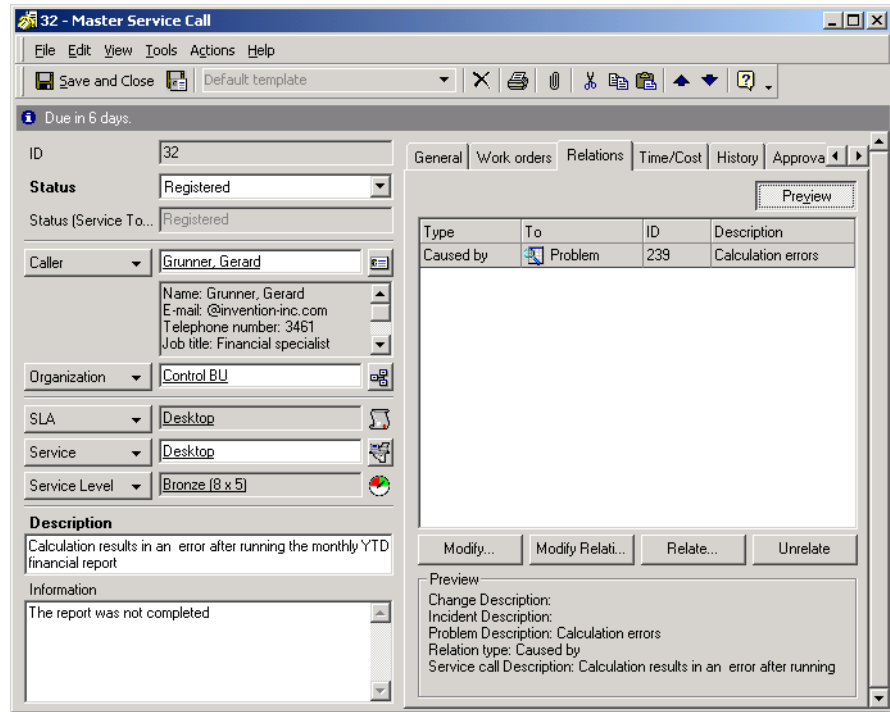
## Relating Service Desk Items

By relating Service Desk items, you can proactively resolve IT infrastructure issues. Relations supply additional information on service calls which have similar issues. You can check the related Service Desk items by clicking the record.

If the related Service Desk item is closed, you should check the solution to see if the issue is a known error or a solution was provided. By checking the related service calls, incidents, changes, projects or problems, you can greatly reduce your time expenditure. The following figure shows a service call relation to a problem:

**Figure 8-1**

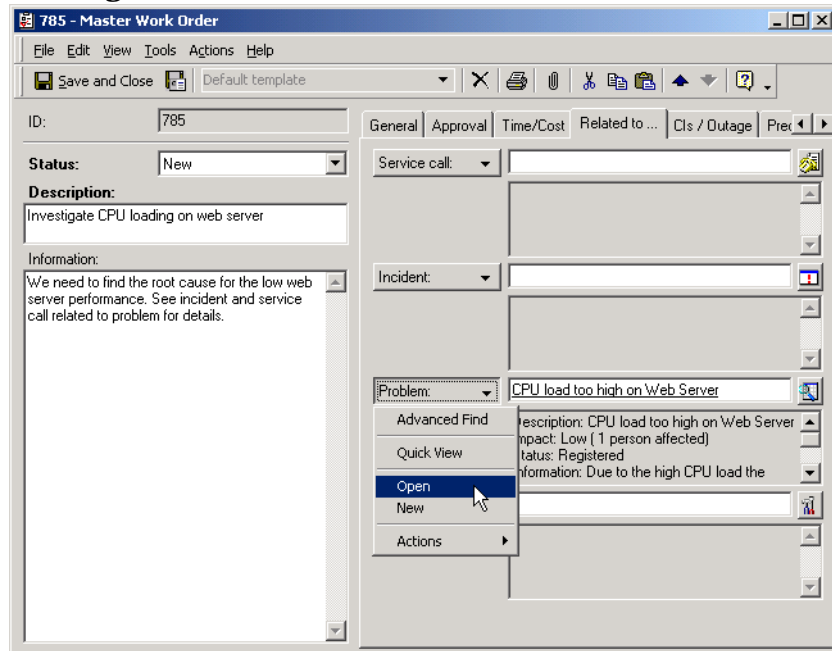
**Service Call Relation Tab**



**Scenario: Investigating a Problem**

Stan Barns, a member of the Server Specialists group at Invention Incorporated, has been assigned the task of investigating the performance of a web server to identify the root cause of its low performance (see “Scenario: Registering a Problem” on page 159). He opens the work order that has been assigned to him, views the tab page showing relations with other workflow items, and opens the related problem:

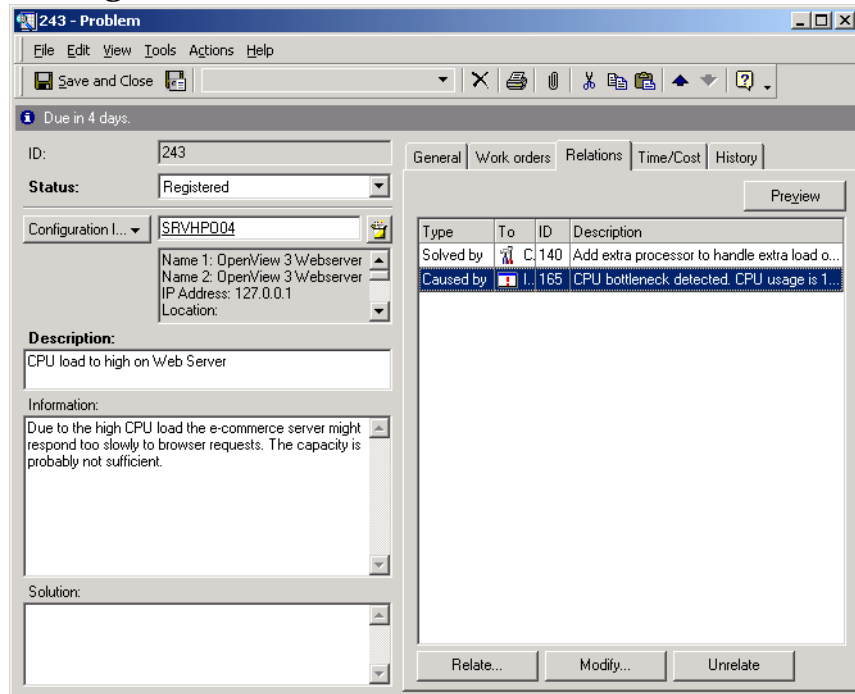
**Figure 8-2** Viewing the work order



By viewing the relations tab page in the problem, he sees that the problem has a “caused by” relation with an incident:

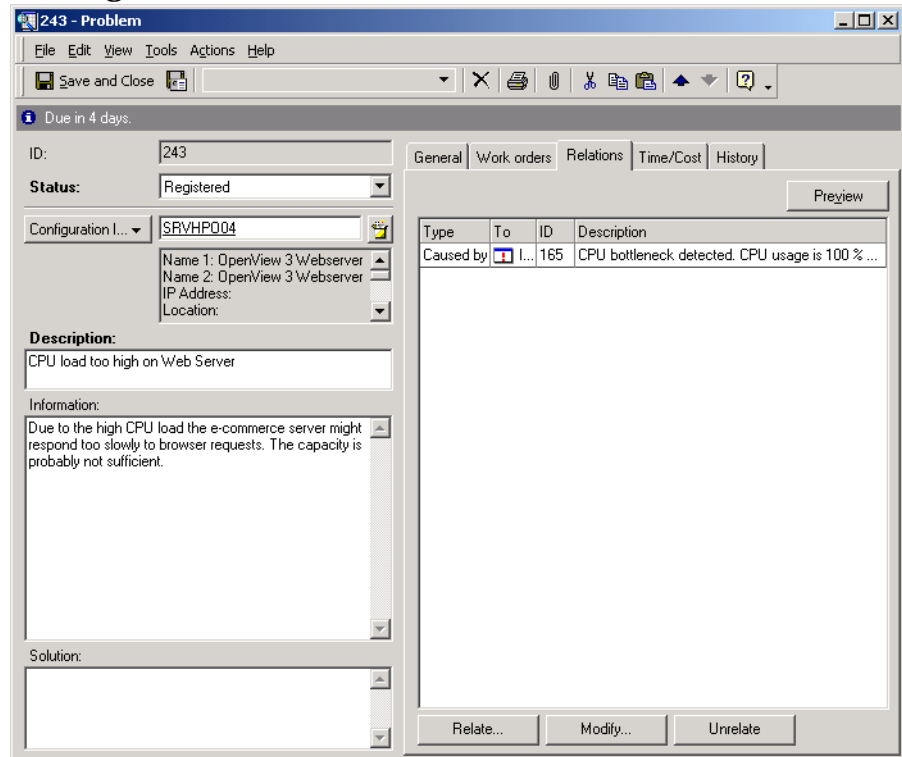
Figure 8-3

### Viewing Details of the Incident



He opens the incident to study the details:

**Figure 8-4** Viewing Details of the Incident

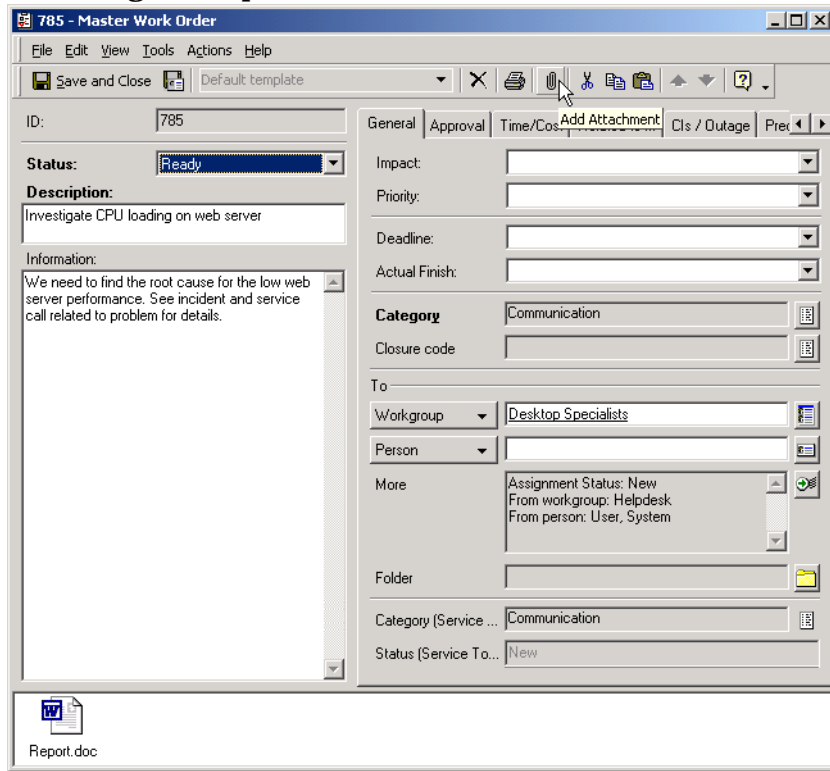


Based on the information supplied in the incident, Stan uses log file entries and diagnostics information to establish a report detailing the pattern of server loading throughout the day and week. The report shows that during certain periods of the day, the web server receives requests to deliver web pages at a rate higher than it can handle. The web server hosts a commercial e-commerce web site, and its popularity was underestimated at the business planning stage.

Stan attaches the report to the work order, changes its status to Ready, and assigns it back to the originator, who can then assess any changes that need to be made in the light of Stan's investigations (see "Scenario: Initiating a Change" on page 162):

Figure 8-5

### Attaching the Report to the Work Order



## Identifying Related Service Desk Roles

Your role as specialist interacts with the following Service Desk roles:

- Change manager

The change manager may create change requests that you are required to implement. Change requests may be accompanied by work orders requiring your action.

The service calls you resolve are reviewed to identify changes both proactively and reactively. In addition, you may be required to notify customers of the impending changes to their CIs.

- Problem manager

The problem manager may create problem requests that you are required to investigate. Problem requests may have associated work orders requiring your action.

- Service level manager

Service level agreements determine the level of support and service a customer is entitled to. The service level manager must incorporate your resources and response time into creating realistic SLAs. Your response time on all Service Desk processes will support the service level manager's negotiated agreements with end-users.

- Help Desk Personnel

The service calls that help desk operators register but are unable to resolve may be assigned to you.



---

# 9

## Change Manager Tasks

Change management involves the management of scheduled changes in your IT infrastructure. This includes scheduling changes, providing detailed information about scheduled changes, planning outages, and deleting changes.

## Administering Changes

You can identify changes in Service Desk from the main console. When you want to add a change, a form similar to the following is displayed:

**Figure 9-1** New Change Form

The screenshot shows a 'New - Master Change' window with a menu bar (File, Edit, View, Tools, Actions, Help) and a toolbar. Below the toolbar, there's a status bar indicating 'Due in 12 days.' The form is organized into several sections:

- General:** ID, Status (Registered), Requestor, Description (Add extra processor to handle extra load of the Web Server), Information (The Web Server right now is not capable of handling the huge amount of requests, therefore an extra processor will be added), Solution, Configuration I... (SRVHP004), Project (TEST), Manager.
- Approval Sheet:** Impact (Top (Site / Organization affected)), Priority (1 Top), Deadline (26/3/02 13:0), Actual Finish.
- Work orders:** Category (Unplanned), Classification (Incident/problem), Closure code, Category (Service...) (Unplanned), Status (Service To...) (Registered).
- Relations:** To (Workgroup, Person), More (From workgroup: Network Specialists, From person: Trout, Helen), Folder.

## Approving Changes

The delivery of business-critical IT services depends on prompt decision making. Steps within the IT management process may need to be authorized to maintain agreed-upon service levels. Ensuring that the appropriate specialists are involved in decision making before implementation is crucial to productivity. When authorizing IT management processes, it is counter-productive and time-consuming to manually track issues requiring action.

Service Desk approval provides a structured, process-oriented mechanism that supplies an effective method of managing and authorizing IT management processes. For an overview of the approval process in Service Desk, see “Introducing Approval” on page 52.

## Viewing Changes

Change requests can be accessed and viewed in a variety of ways from within the Service Desk console. You can display changes from the Change data view. Alternatively, you can view changes in the following ways:

- Choosing an overview action from those available on the `Action` menu. For example, while viewing a list of all CIs, you can choose an overview action to display all changes affecting the currently highlighted CI.
- Choosing `Advanced Find`.

For additional information on using `Advanced Find` or the `Action` menu, please refer to the Service Desk Online Help.

## Updating Configuration Items

If you assign work orders to change requests that involve modifications to attribute values of configuration items, you can trigger the attribute values to change automatically as soon as the work order reaches a specified status. See “Updating CIs According to Work Orders” on page 146.

## Closing Change Requests

When you are ready to close a change request, you will need to update the status of the request to `Closed`.

Occasionally, you may be required to close change requests which required no action. For example, a change request that has been entered in error or a duplicate change request do not require any actions and they must either be closed or deleted.

Your IT infrastructure management team may determine how you should handle such cases. You may address duplicate calls in one of two ways:

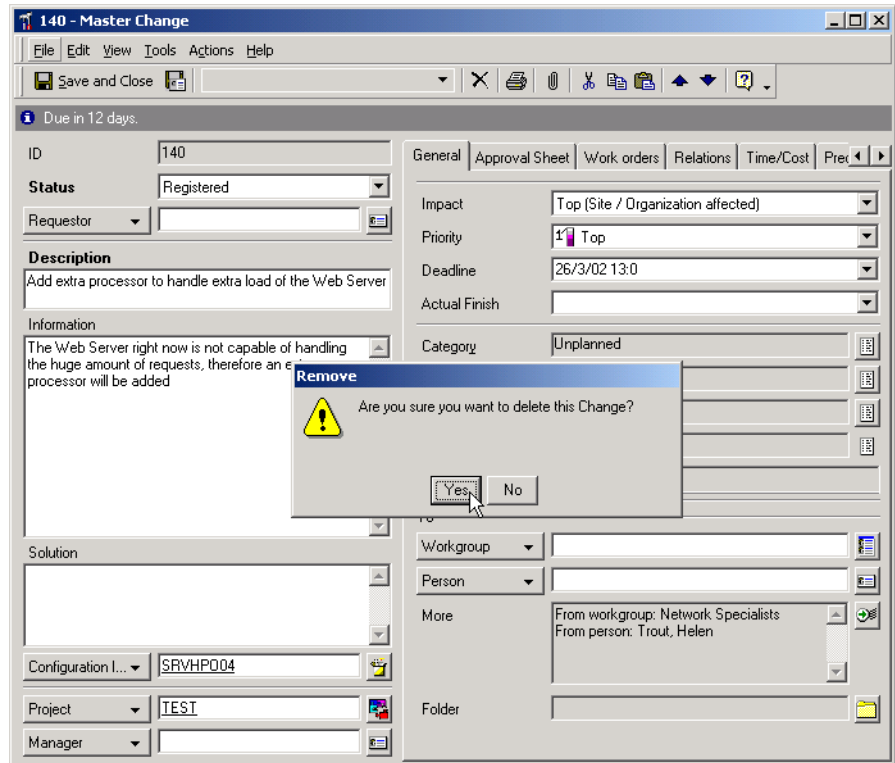
- Deleting the change

If your management team determines removing the records entirely from Service Desk is appropriate, please use this option with care as in Figure 9-2. The record will be permanently deleted from Service Desk by using **CTL+D**. If a help desk operator has related the change to other service calls or incidents, problems may occur in your CMDB.

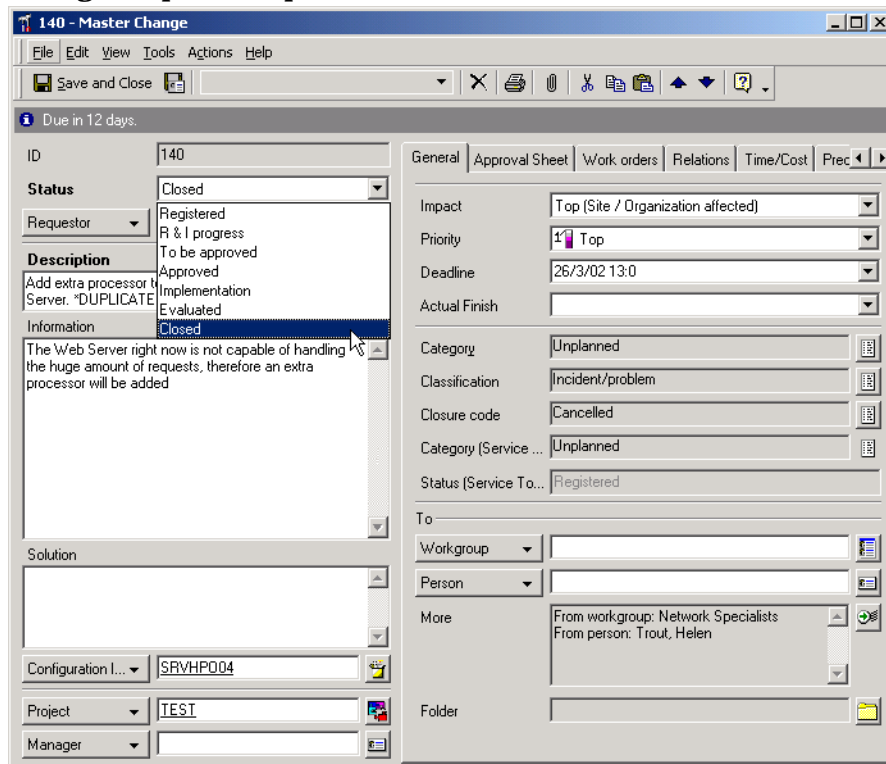
- Changing the status to closed

Your management team may decide that the status must be changed to Closed if, for example, the change request is a duplicate. Selecting **Cancelled** from the **Closure Code** field is one possibility, but it would be advisable to ask your Service Desk system administrator to create a closure code titled **Duplicate** to identify such situations. In the example provided in Figure 9-3, the change manager has supplied a reason in the **Description** field and selected a closure code of **Cancelled**.

**Figure 9-2** Change Request Deletion



**Figure 9-3** Change Request: Duplicate Closure



**TIP**

The change manager can simulate changes before they are implemented and closed. By creating a test database, the change manager can preview the effects of the changes before implementation. Discuss creating a test database with your Service Desk system administrator.

## Planning Occasional Outages

Service Desk provides outage planning features that enable you to minimize the disruption caused by occasional (incidental) outages due to work requiring the shutdown of CIs for a period of time. Occasional outage planning has the following benefits:

- Service Desk can calculate a window of opportunity that identifies a period when the planned outage would have the least impact on services that use the affected CIs.
- Help desk staff can respond to service calls registered during an occasional outage of a CI. Callers can be informed of the outage, and can be given an indication as to when the CI is due to become available again.
- Information about occasional outages can be used to suppress 'node down' messages in OpenView Operations, as described in "Passing Outage Information to OpenView Operations" on page 145.

If a CI undergoes regular recurring planned outages, this information can be registered in the CI, as described in "Specifying Periodic Outages" on page 116.

---

### NOTE

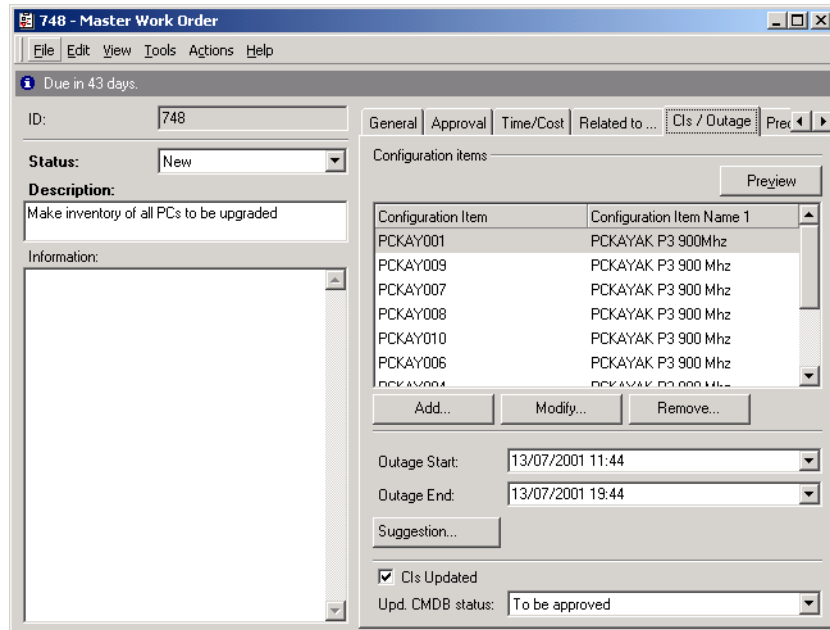
Occasional outage planning is supported not only in work orders related to change requests, but also in work orders related to service calls, incidents, problems, and projects.

---

An occasional outage is specified in the work order for the task requiring the outage:

Figure 9-4

### Work Order Involving Occasional Outage



When you double-click a related CI, a dialog box is displayed, in which you can specify whether the particular CI is affected by outage.

For occasional outages, you can specify the outage period directly, or Service Desk can perform a 'window of opportunity' calculation, which calculates a suggested time period when the impact would be minimal on services that use the affected CIs:



Figure 9-5

### Planning Suggestion

Planning Suggestion

Preconditions

Planning Period: 01/01/2002 13:59 to: 31/01/2002 13:59

Duration: 8 Hours Minutes

Calculate

Suggestion

Suggested Period: 01/01/2002 13:59 to: 01/01/2002 21:59

Available Period: 01/01/2002 13:59 to: 01/01/2002 21:59

OK Cancel

The 'window of opportunity' calculation takes support hours and time zones into consideration, and is especially useful if a work order affects the outage of a number of CIs.

### Passing Outage Information to OpenView Operations

Planned outage information can be sent to reconfigure OpenView Operations for UNIX to suppress 'node down' messages during outage periods.

For an occasional outage specified in a work order, you can pass outage information for each CI impacted by the outage. For periodic outages, you can pass outage information for each impacted CI.

Information passed to OpenView Operations includes recurring and occasional outage times, condition status variables, applications impacted on nodes subject to outage, severity, and message operation details. For further information on passing outage information to OpenView Operations, please refer to *Service Desk Online Help*.

Additional configuration tasks are required to enable the passing of outage information to OpenView Operations. Please refer to *OpenView Operations Integration Administrator's Guide* for details.

## Updating CIs According to Work Orders

When planning changes that involve modifications to attribute values of CIs, you can specify the planned values within the work order, and you can trigger the attribute values to change automatically as soon as the work order reaches a specified status.

Although the planning of changes most commonly involves physical moves of CIs to new locations, the transfer of CI ownership, and the transfer of administrative responsibility, you can plan changes to any simple attribute value of a CI (that is, any attribute that holds a single value as opposed to a list of values).

---

### NOTE

Automatic updating of CIs is supported not only in work orders related to change requests, but also in work orders related to service calls, incidents, problems, and projects.

---

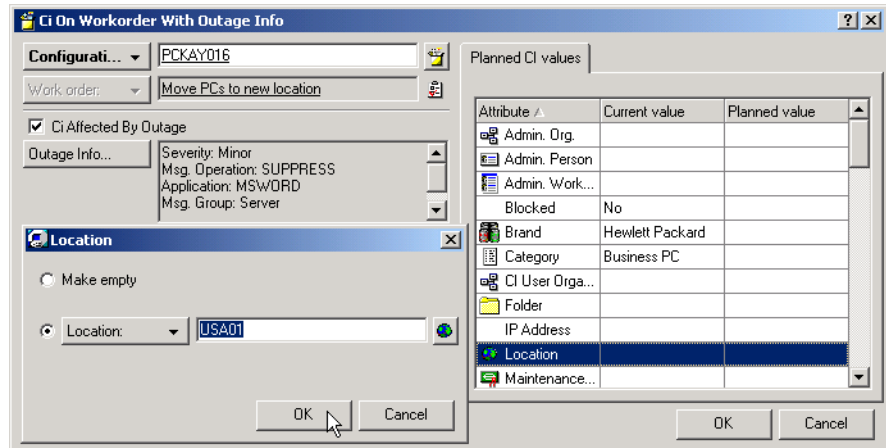
## Specifying Planned Attribute Values

You can specify attribute changes for any of the CIs related to a work order.

Planned attribute values are specified in the CI On Work Order With Outage Info window, which is displayed when you relate a CI to the work order. For example, the following figure shows a change to the location of a CI being planned:

Figure 9-6

### Specifying Planned Attribute Values

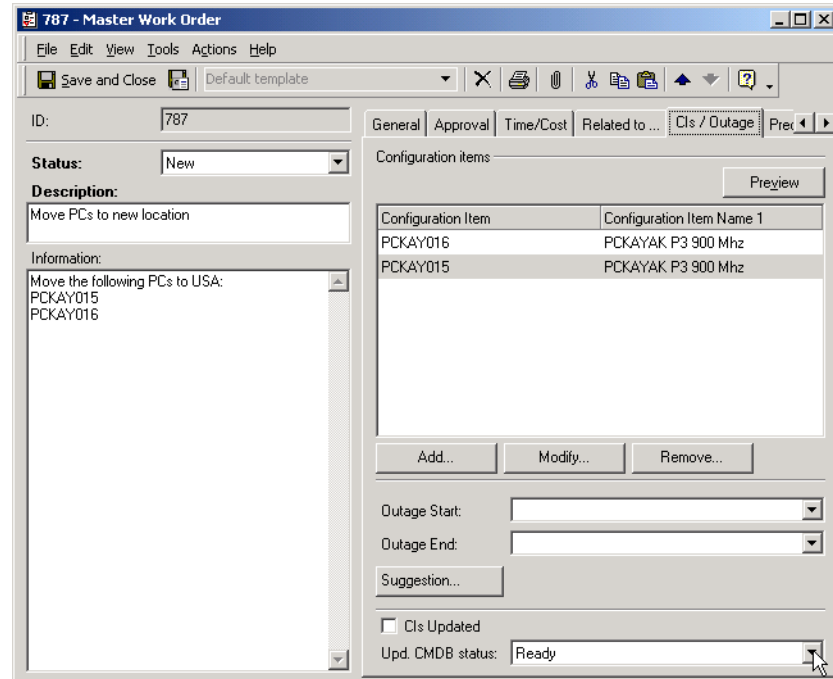


The CI On Work Order With Outage Info window displays the attribute names, the current value of each attribute (blank fields indicate attributes for which no value is currently assigned), and the planned attribute value (blank fields indicate attributes for which no change is planned).

The work order in the following figure triggers the updating of two CIs to take place as soon as the work order reaches the Ready status:

**Figure 9-7**

**Specifying the Work Order Status that Triggers the CI Update**



The CI's Updated check box indicates whether an update has already been completed. Once updated, the planned values cannot be changed.

**Specifying the Change Manager**

The change manager can be specified in the manager field in the change entity. The names available to be specified as change manager can only be added/removed by the system administrator.

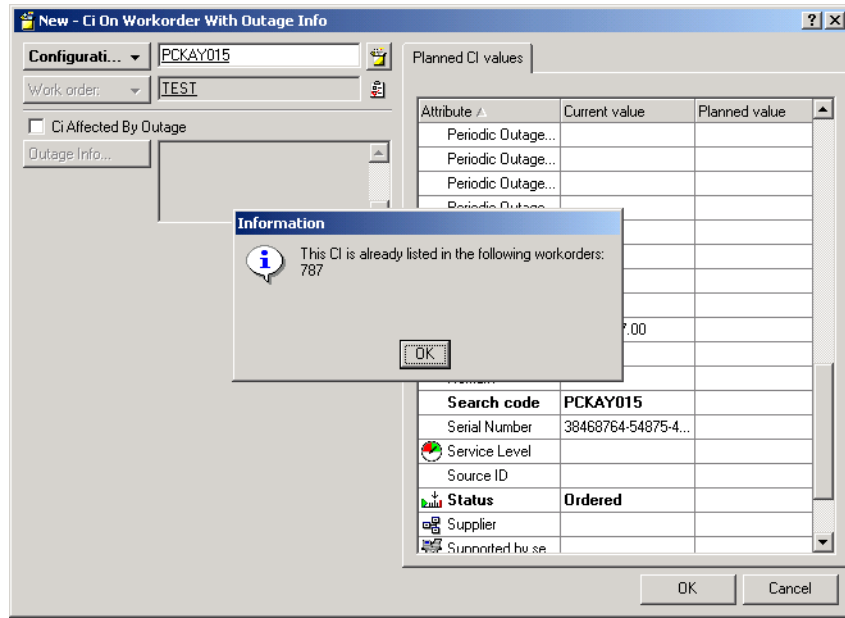
**Checking if a CI is Related to Other Work Orders**

If a CI is subject to more than one work order, you can plan separate attribute changes in each work order.

Whenever you relate a CI to a work order, Service Desk checks if the CI is already related to other work orders. If other work orders are found for which the actual finish date has not yet expired, the work order IDs are listed in a message box:

Figure 9-8

Listing Other Work Orders Affecting a CI



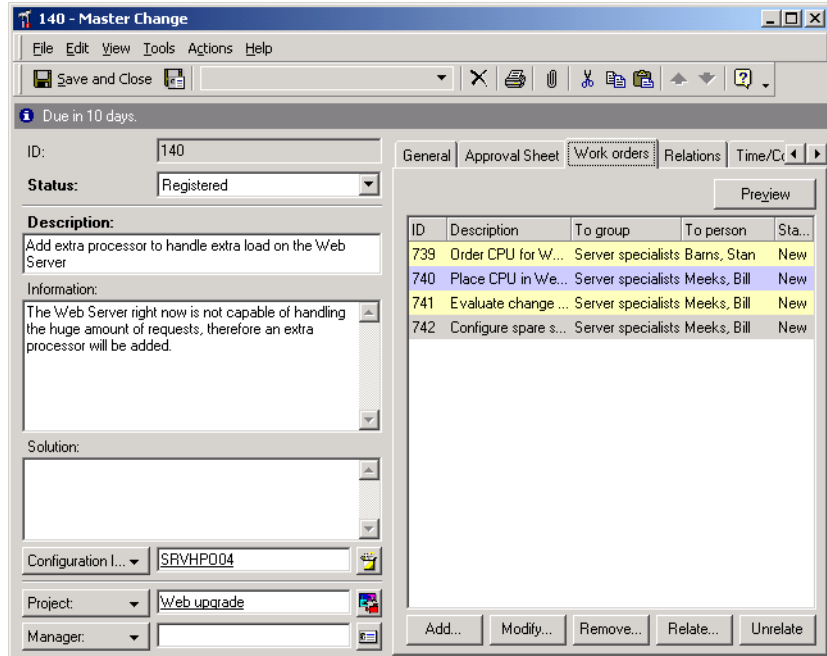
You can then check the planned changes to attribute values in the listed work orders to avoid duplication of changes.

## Scenario: Planning a Change

Paul Adams, a change manager at Invention Incorporated, is responsible for implementing a change to install an additional CPU in a web server. The change is already approved (see “Scenario: Approving a Change Request” on page 56), but it must now be planned, and the tasks involved in the change must be assigned.

He adds a number of work orders to the change, and assigns each one to a suitable specialist:

**Figure 9-9**      **Creating Work Orders**



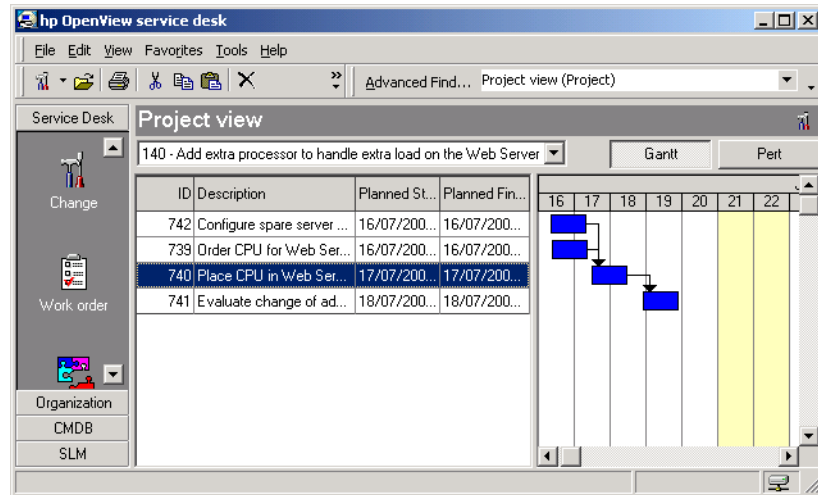
The tasks involve configuring a spare server to act as a temporary replacement for the overloaded web server, ordering a CPU, installing it, and evaluating the improvement in performance.

The tasks are grouped together to indicate dependencies, such as tasks that cannot start until other tasks have been completed. For example, the installation of the CPU can only be performed after the CPU has

been ordered and delivered, and a backup server has been configured as a temporary replacement, but these two preceding tasks can be performed concurrently.

Paul uses the graphical Gantt chart project view to verify the scheduling of the tasks:

**Figure 9-10** Viewing Start and Finish Dates Graphically



## Identifying Related Service Desk Roles

Your role as change manager interacts with the following Service Desk roles:

- **Configuration manager**  
The configuration manager classifies the assets in the IT infrastructure requiring changes.
- **Problem manager**  
Your role closely interacts with the problem manager. The problem manager creates most of the change requests requiring your intervention. The problem manager reviews service calls and recurring incidents. When a pattern is identified, a change request is opened.
- **Help desk personnel**  
Help desk operators register service calls which you review to identify CIs requiring changes.
- **Service level manager**  
Service Level Agreements determine the level of support and service a customer is entitled to. The service level manager directly affects the amount of service and changes to CIs that you, as change manager, and the specialist are able to provide.
- **Specialists**  
Specialists implement the changes that you plan. The specialist will need to interact closely with you to detail when actions are implemented. You should not close change requests before notification from the specialist of completion.



---

## **10**      **Problem Manager Tasks**

This chapter describes the general approach a problem manager may take when implementing Service Desk. An outline of the process of pro-active and re-active problem management is also provided.

## **Administering Problem Manager Tasks**

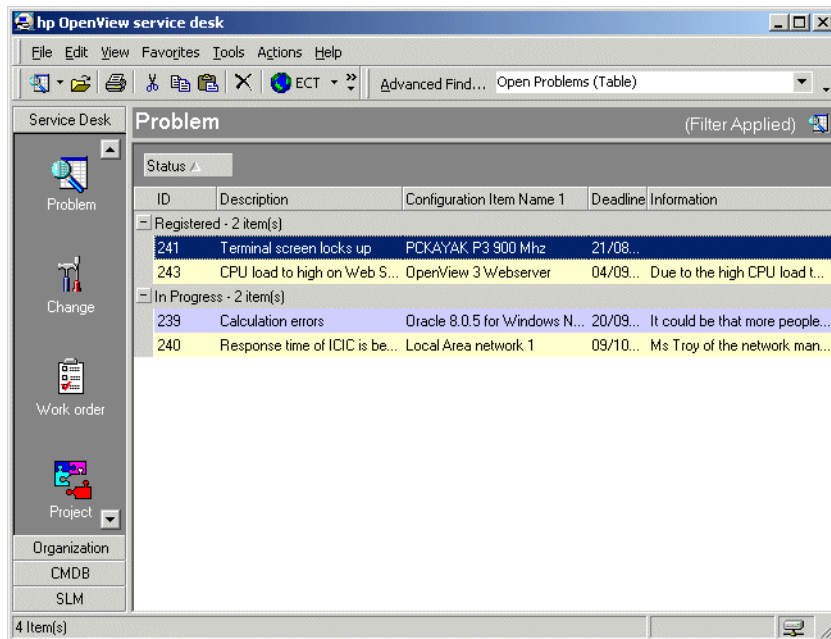
The problem manager identifies and resolves problems in an IT infrastructure to support IT service quality goals.

Problem management attempts to identify deficiencies in the service delivery or service support functions, especially those that cause recurring problems. By solving problems, problem management aims to reduce the quantity of service calls and incidents.

Problem management is not simply a matter of responding to recurring issues. You can also anticipate issues requiring changes. You can identify problems before service calls are reported. For example, if a department plans an international move, you could identify the move as a problem that could result in service calls from lost network connections to missing peripherals.

Registered problems are displayed in the Problem data view:

**Figure 10-1** Problem Data View



The purpose of registering problems in Service Desk is to identify the root cause of problems in the IT infrastructure. By identifying the root cause of a problem, a definitive solution can be investigated and implemented. By identifying a problem, you begin with a known error. As problem manager, you identify known errors so that the change manager can provide solutions.

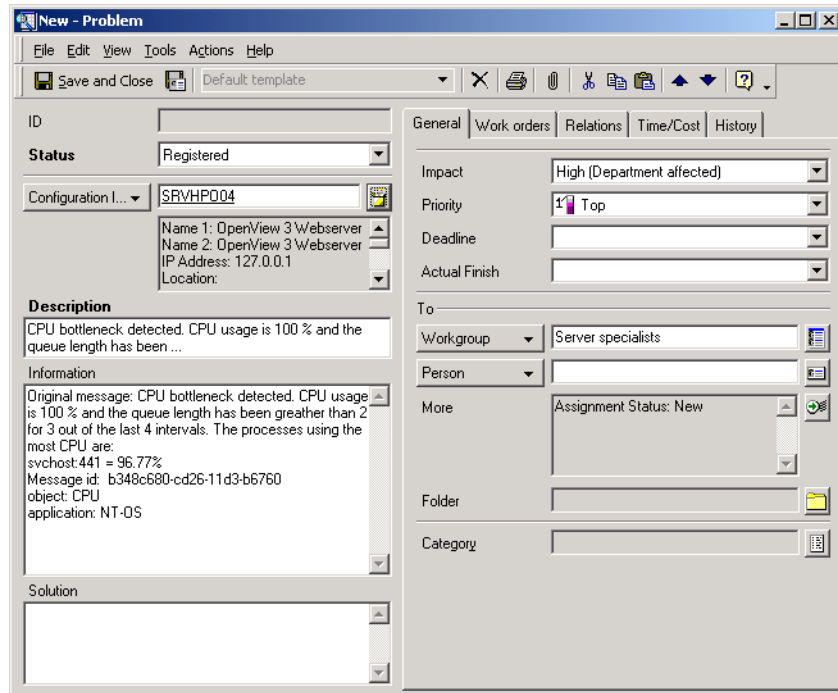
Viewing reported service calls is vital to your role. You need to review service calls to identify problems that need to be solved. For further information on viewing open service calls, refer to “Viewing Service Calls” on page 98 in Chapter 6, Help Desk Personnel Tasks, or Service Desk Online Help.

## Registering Problems

When registering a problem, gathering essential information is crucial to resolution. The information you, as problem manager, enter is used by the change manager to propose modifications in the IT infrastructure.

When you register a new problem, a form similar to the one in the following figure is displayed:

**Figure 10-2** **Problem: New Request**



The following fields are always mandatory:

- Description

An accurate description of the exact issue must be entered. The description provides a starting point for resolving the problem. The description can also contribute to a set of frequently asked questions (FAQs) maintained in Service Pages. (See “Introducing Service Pages” on page 71.)

- Status

Clicking the arrow next to the Status field displays a list of codes to describe the status of the problem. You cannot enter a free text response but must select from the list administered by the Service Desk system administrator. For example, you can indicate that a problem has been registered by selecting Registered from the list.

---

**NOTE**

Other fields may also be mandatory, as determined by your IT infrastructure management in cooperation with the Service Desk system administrator. By default, mandatory fields are displayed in a bold font. You can change the appearance of mandatory fields to help identify them.

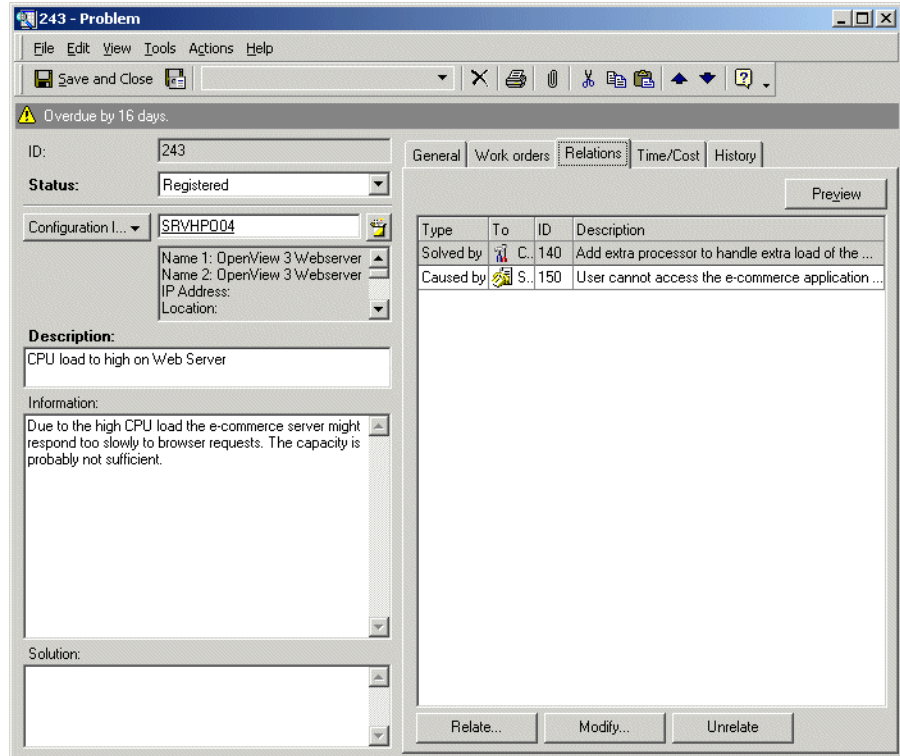
---

### **Relating Service Desk Items**

As part of the process of registering a problem, you need to relate the problem to service calls and incidents.

By indicating the service calls and incidents that are related to problems you identify, your change manager can resolve IT infrastructure issues. The change manager can view the related items:

**Figure 10-3** Problem Request: Service Call Relations



Relating Service Desk items also records your investigation into known errors. Other authorized Service Desk users can view the information and take appropriate action. For example, suppose you relate a problem to several open and closed service calls. A specialist is currently working on an open service call and has proposed a workaround. The specialist knows that the IT infrastructure management is aware of the problem and can advise the end-user that a permanent resolution is pending.

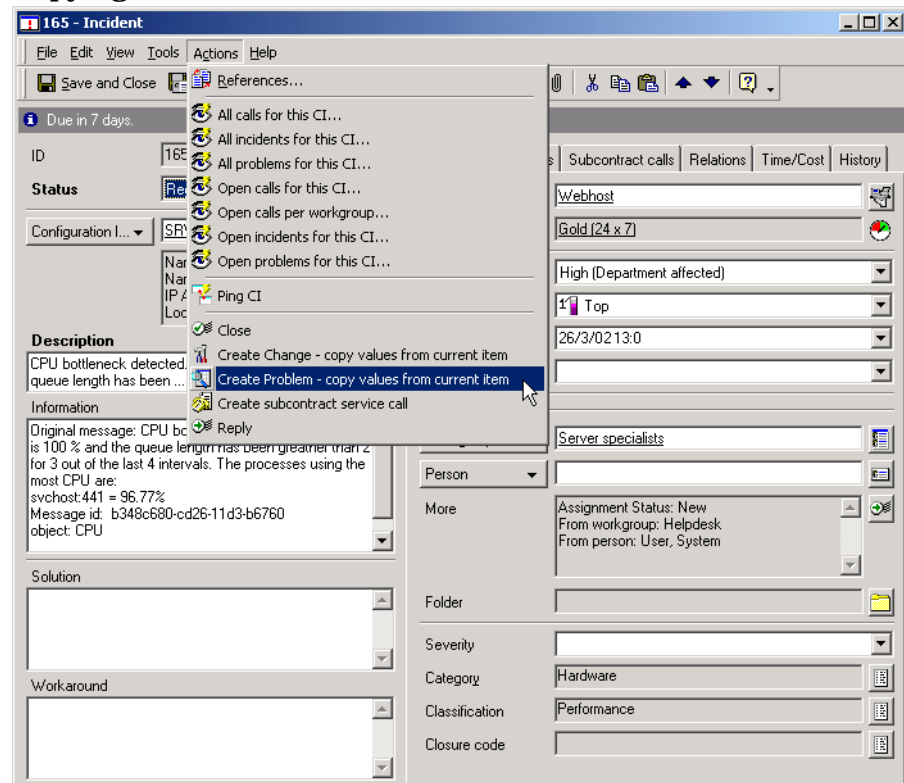
For additional information on relating service calls and incidents to problems, please refer to Service Desk Online Help.

## Scenario: Registering a Problem

Graham Michael, a problem manager in the IT Service Management department within Invention Incorporated, identifies a problem requiring investigation while observing the history of incidents raised against a particular web server. He selects a representative incident in the incidents view, and creates a new problem from it:

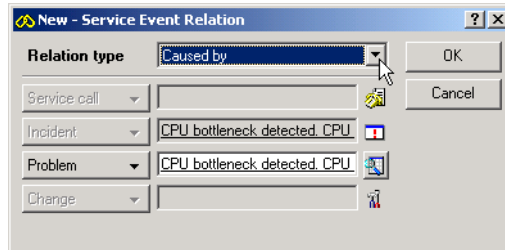
Figure 10-4

### Copying an Incident into a Problem



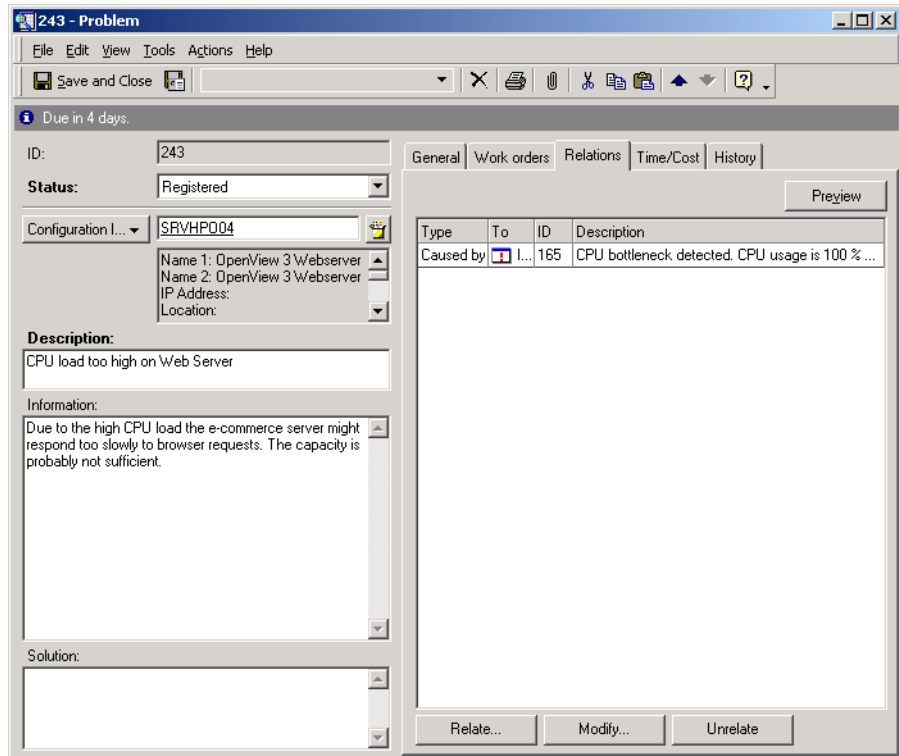
Service Desk creates a new problem record into which data is copied from the incident. Graham modifies the contents of the Information and Description fields, then closes the problem. Service Desk displays a dialog box in which Gordon specifies the type of relation the problem has with the incident (in this case the problem is caused by the incident):

**Figure 10-5** Specifying the Relation Type



The defined relation can now be seen in the problem's list of relations:

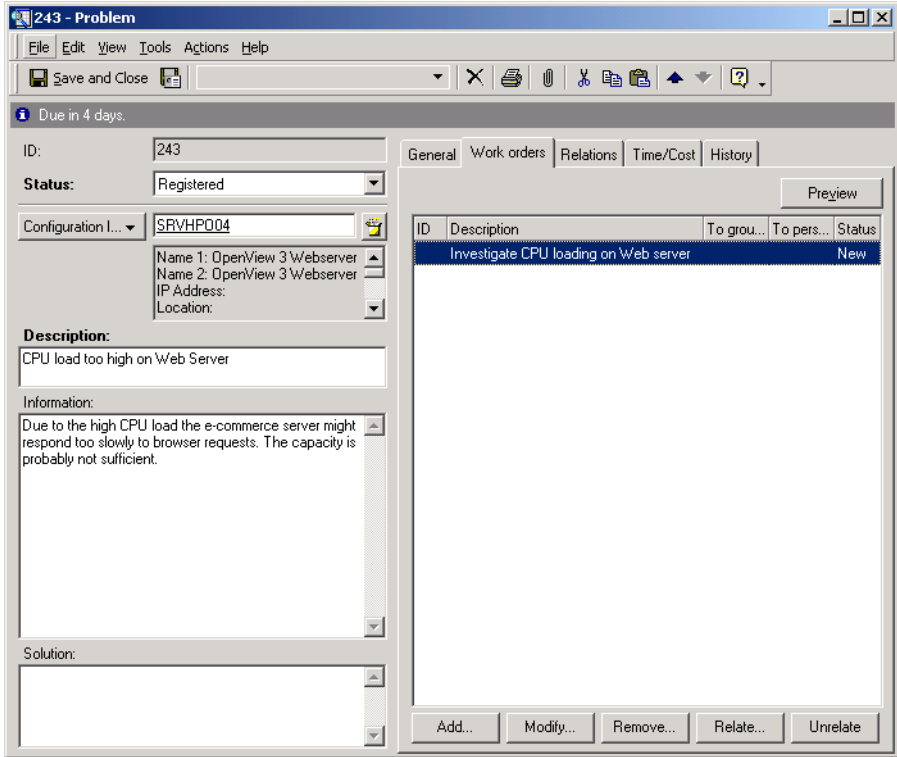
**Figure 10-6** Relating the Problem to an Incident



Graham then adds a work order requesting investigation of the problem to find the root cause:



**Figure 10-7** Assigning the Problem to a Specialist



The work order is assigned to a specialist in the Web Specialists workgroup (see “Scenario: Investigating a Problem” on page 131).

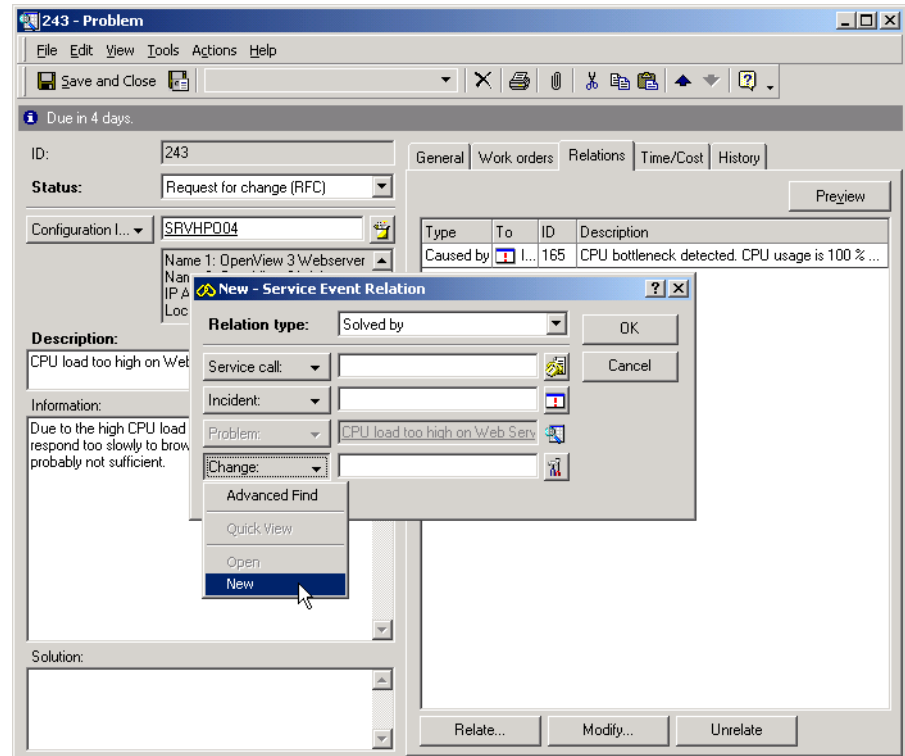
## Scenario: Initiating a Change

Graham Michael, problem manager in the IT Service Management department within Invention Incorporated, receives a completed work order detailing the results of an investigation into the CPU loading on a web server (see “Scenario: Investigating a Problem” on page 131). The report indicates that the CPU is overloaded at particular times during the week. Graham decides to propose adding a CPU to the web server.

He opens the relevant problem record, changes its status to Request for change, and adds the proposed change as a new “solved by” relation:

Figure 10-8

### Adding a New Change Request as a Problem Solution Proposal



The new change request is opened in the default form. Graham provides basic details outlining the nature of the requested change. The change request policy at Invention Incorporated requires this type of change to

undergo an approval process, so Graham places a request to initiate approval by entering his name in the Requestor field on the approval sheet and assigning the change request to the change manager:

Figure 10-9

### Requesting an Approval Process for the Change

The screenshot shows a window titled "140 - Master Change" with a menu bar (File, Edit, View, Tools, Actions, Help) and a toolbar. A warning icon indicates "Overdue by 75 days." The form is divided into several sections:

- General:** ID: 140, Status: Registered.
- Description:** Add extra processor to handle extra load of the Web Server. Information: The Web Server right now is not capable of handling the huge amount of requests, therefore an extra processor will be added.
- Approval Sheet:** Requestor: Michael Graham, Initiator: (empty), Description: (empty), Approval Status: (empty), Deadline: (empty), Result: Incomplete, #Approvers Required: (empty), Strategy: 0 Out of 0, Approval group: (empty), Approval Votes: (empty).
- Solution:** (empty text area).
- Configuration:** SRVHPD04.
- Project:** Web upgrade.
- Manager:** (empty).

Buttons at the bottom include "Add...", "Modify...", "Remove...", and "Preview".

When Graham saves and closes the form, Service Desk places the change request in the change manager's Service Today data view. The change manager can now conduct the approval process for the change (see "Scenario: Approving a Change Request" on page 56).

## Identifying Related Service Desk Roles

Problem management interacts with the following Service Desk roles:

- **Change Manager**

Problem managers need to interact closely with change managers. The problem manager is the initiator of many change requests.
- **Configuration Manager**

Your tasks as problem manager are critical to configuration managers. Without your accurate identification of recurring service call issues, the configuration manager is not aware of issues requiring modifications to the IT infrastructure issues.
- **Help Desk Personnel**

Help desk operators register service calls which you review proactively and reactively to identify recurring IT infrastructure issues.
- **Service Level Manager**

Service Level Agreements determine the level of support and service a customer is entitled to. The service level manager directly affects the amount of service to CIs that you, as problem manager, and the change manager are able to provide.
- **Specialists**

By reviewing the investigations of specialists, you can identify known errors. As the IT infrastructure personnel in the field, specialists also report recurring issues. Specialists need to interact closely with you to detail when workarounds and solutions to known errors are implemented.

---

# **11** **Service Level Manager Tasks**

This chapter provides hints and tips on establishing a service structure, defining service level agreements, and monitoring their performance. It includes information on developing, creating, and defining service level agreements.

## Establishing Service Structures

An effective service level management process is based on a clear understanding of the dependency relations between the various services involved in an IT infrastructure. Service Desk helps the service level manager to develop this understanding by:

- enabling services to be registered according to their type;
- enabling services to be assembled in structures that accurately describe their inter-dependencies.

The benefits of establishing a service structure are seen in improved root cause and impact analysis capabilities, including:

- the ability to trace service calls to root cause incidents raised either on configuration items or on services;
- a clearer distinction between impact events and root-cause events, leading to easier identification of the service level agreement applicable to resolving an event;
- the ability to assess the impact on top-level services when failures occur either on lower level services or on configuration items;
- quick identification of service providers who need to be addressed when higher level services are affected by the disruption of a lower level service or configuration item;
- validation of underpinning service levels.

## Service Types

In IT service management, many best practice models distinguish between different types of service. Doing so enables the identification of different types of relations between different types of service and configuration items.

Service Desk distinguishes between the following types of service, each of which is defined below:

- Business services
- Operations management services
- Underpinning services

### **Business Services**

Business services are the facilities that provide transaction processing capacity and/or system resource capacity. These include all services delivered to customers in accordance with an agreed level of service for an agreed cost, and lower level services that are not necessarily offered to customers. Lower level services might be acquired from external providers. Examples of business services include application services, network services, and hosting services.

### **Operations Management Services**

Operations management services provide general management responsibilities for the administration and fault handling of the hardware and software resources used by business services.

Typically, an IT organization that provides business services may split responsibility for the management of resources into specialist areas (such as network, database, and server management) regardless of the business services that use those resources.

Furthermore, certain operations management services may be outsourced. This is common for relatively mature commodity operations management services, which a specialist organization may be able to deliver more economically than a business service provider.

### **Underpinning Services**

When certain areas of responsibility are outsourced by an operations management service provider (for example, the provision of maintenance and repair), the provision of the outsourced service is referred to as an underpinning service.

By definition, there must be a relation between an underpinning service and the operations management service it underpins, and also between an underpinning service and the configuration items it is responsible for supporting.

### **Service Relations**

Once a service level manager has identified the services involved in an IT infrastructure, the next step is to consider the way each service relates to other services and to configuration items. In line with many best practice models, Service Desk identifies a number of distinct types of relations, each of which is defined below.

### **Parent–Child Relations**

A particular service may be composed of distinct areas each of which is offered as a service. Parent–child relations can exist between business services or between operations management services.

An example of a parent-child relation between business services is where a service provider offers a complete supply-chain-management solution to a trading-partner community. Typically, the main customer is an enterprise that requires a service level agreement covering the overall parent service. Suppliers and distributors in the trading-partner community, however, only need to sign up for certain specific child service components, and require service level agreements that cover those narrower service provisions.

### **Using–Used Relations**

A particular business service may use (that is, depend on) other business services, and it may itself be a resource used by other business services. These relations form a hierarchy that contains business services towards the top, lower level services lower down, and configuration items at the bottom.

A used business service may be provided in-house, or it may be outsourced to an external IT service provider.

### **Managing–Managed Relations**

Relations of this type are between operations management services and the configuration items over which they assume managerial responsibility.

### **Supporting–Supported Relations**

Relations of this type are between underpinning services and the configuration items for which they assume specific areas of responsibility, such as the repair or replacement of hardware.

### **Underpinning–Underpinned Relations**

Relations of this type are between underpinning services and the operations management services that outsource specific areas of responsibility, such as the repair or replacement of hardware.



## Valid Structural Relations for Services and CIs

The following table shows which relations are valid between service types and configuration items. To read the table, choose an entry from the left column to see whether it relates to an entry in the top row. For example, an operations management service can manage configuration items, a configuration item can be supported by an underpinning service, and an underpinning service can underpin operations management services:

**Table 11-1 Valid Hierarchical Relations for Services and CIs**

Type	Business Service	Operations Management Service	Underpinning Service	Configuration Item
<b>Business Service</b>	Uses, Parent			Uses
<b>Operations Management Service</b>		Parent	Underpinned by	Manages
<b>Underpinning Service</b>		Underpins		Supports
<b>Configuration Item</b>	Used by	Managed by	Supported by	Uses, Parent

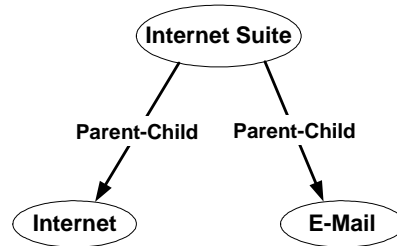
### Scenario: Establishing a Service Structure

Edwin is responsible for implementing a service level management process at Invention Solutions Incorporated. As part of this process, he decides to establish a service structure in Service Desk. To aid clarity, this scenario presents a simplified view of the IT infrastructure under consideration.

Edwin starts by analyzing the business services offered to internal customers. Invention Solutions offers a suite of Internet solutions composed of two services: e-mail and Internet Access (including access to remote computers, file transfer, and Web-browsing). Customers can purchase each component separately, or can purchase the entire suite. Each service is available at two service levels: a standard level with

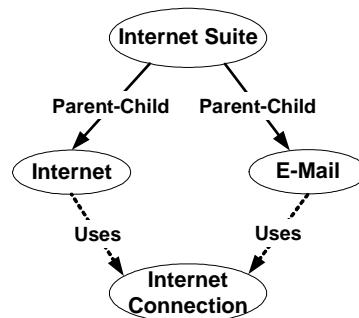
support during normal office hours, and a premier level, with 24-hour support seven days per week. The following figure illustrates the composition of the business services:

**Figure 11-1 Business Service Composition**



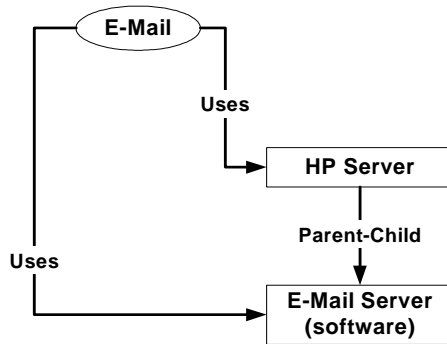
Each business service depends on an Internet connection service, and this relation is illustrated in the following figure. The Internet connection service is provided by an external company. Although this service is not supplied to Edwin’s customers directly, its unavailability would have an impact on the Internet and e-mail services:

**Figure 11-2 Service Usage Relations**



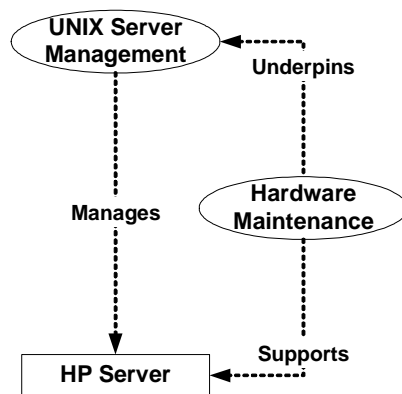
Edwin now considers the configuration items used by the business services. In reality, e-mail service provision would use a number of e-mail servers, with e-mail software installed on each server. In this simplified scenario, we assume that the e-mail service uses two configuration items: an e-mail server and e-mail software. Analysis by the configuration manager has already determined that these configuration items have a parent-child relation.

**Figure 11-3 Configuration Item Usage Relations**



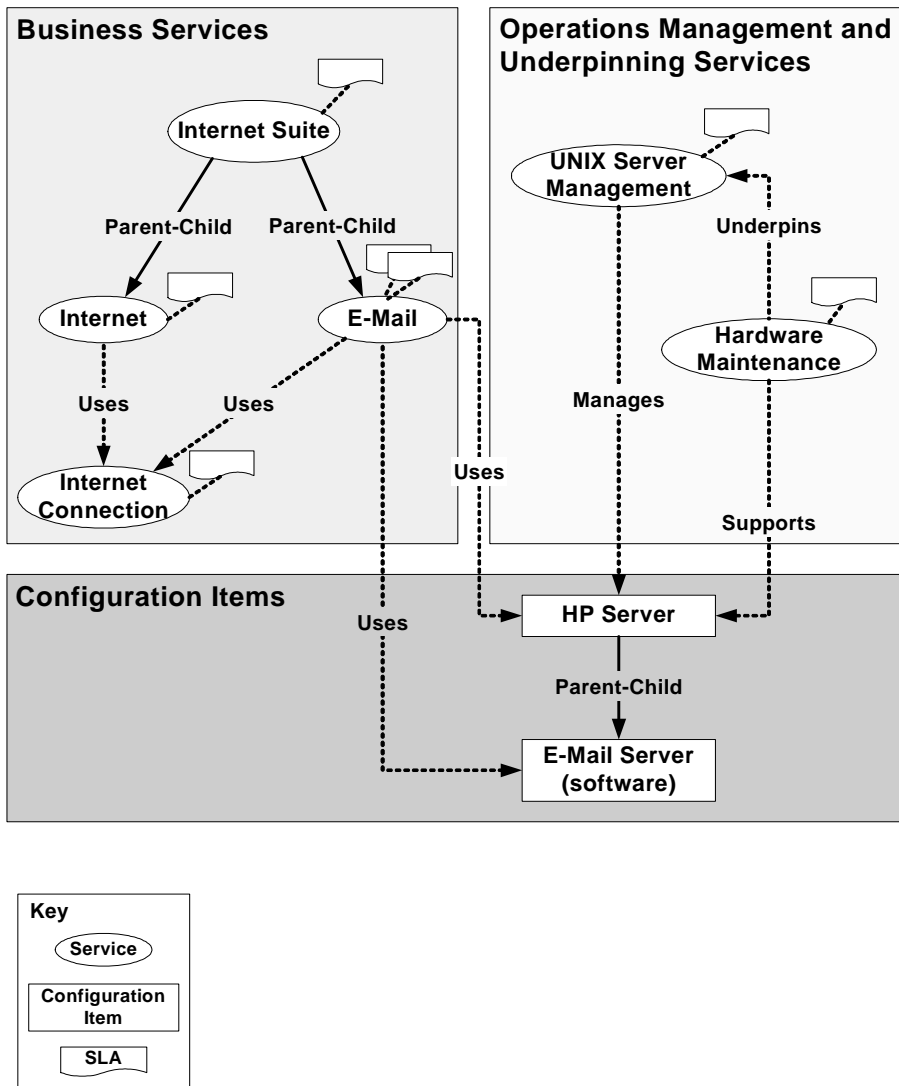
Finally, Edwin considers the operations management services responsible for managing the used configuration items. In this scenario, the HP server is managed by a UNIX server management group within Invention Solutions. However, hardware maintenance is outsourced to Hardware Maintenance Incorporated. The following figure illustrates these relations:

**Figure 11-4 Operations Management and Underpinning Service Relations**



The following figure illustrates all the above relations between business services, configuration items, operations management services, and underpinning services:

**Figure 11-5** The Complete Service Structure

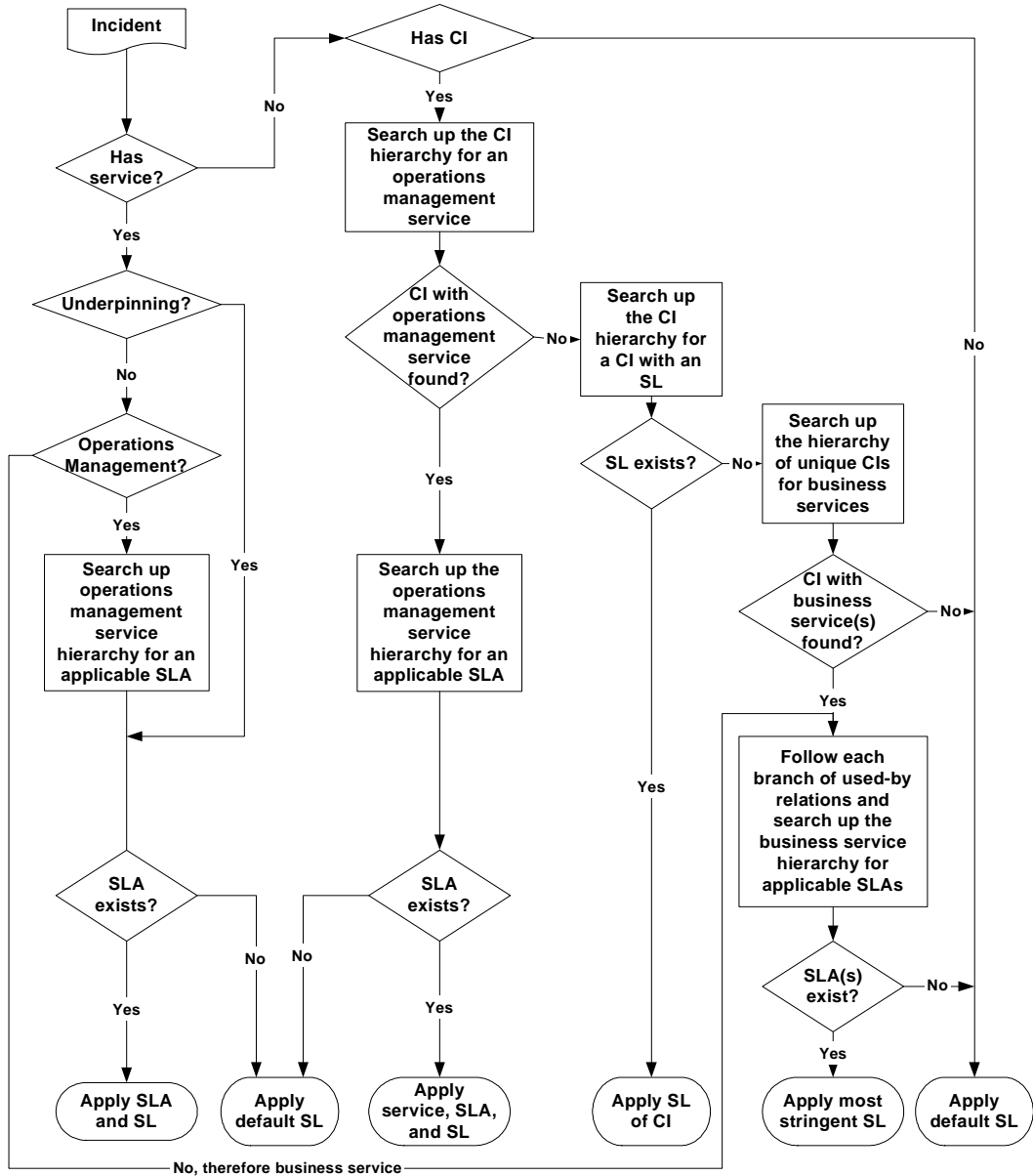


## **Automatic Retrieval of Service Levels into Incidents**

When incidents are created either manually or automatically, Service Desk retrieves the most appropriate service level, and this in turn contributes to the automatic calculation of the event resolution deadline. The content of the service structure determines which service levels are retrieved (as explained below), and service level managers should be aware of this when establishing a service structure.

Figure 11-6 on page 174 illustrates the way Service Desk searches for the most appropriate service level to assign to an incident. See “Incidents Related to a Service” on page 175 and “Incidents Related to a Configuration Item” on page 175 for an explanation of the retrieval algorithm.

**Figure 11-6 Automatic Insertion of Service Level in Incidents**



Key: SL = Service Level; SLA = Service Level Agreement; CI = Configuration Item

### **Incidents Related to a Service**

If the incident is related to an operations management service, Service Desk searches up the operations management service hierarchy and retrieves the first SLA found, together with its service level. If no SLA is found, Service Desk retrieves the default service level.

If the incident is related to an underpinning service with an SLA, the SLA is retrieved together with its service level. If the underpinning service does not have an SLA, Service Desk retrieves the default service level.

If the incident is related to a business service, more than one SLA may be applicable. Service Desk establishes a list of candidate SLAs, identifies the SLA with the most stringent service level, and retrieves that service level. If only one candidate SLA is identified, the SLA is retrieved together with its service level.

### **Incidents Related to a Configuration Item**

If the incident is related to a CI, Service Desk searches for an item of the following types:

1. A responsible operations management service. If an operations management service is found, Service Desk searches up its service hierarchy for an SLA. If an SLA is found, it is retrieved together with the service and service level; otherwise, Service Desk retrieves the default service level.
2. A CI with an assigned service level. If found, the service level is retrieved.
3. A business service that uses the CI. If a business service is found, more than one SLA may be applicable. Service Desk establishes a list of candidate SLAs, identifies the SLA with the most stringent service level, and retrieves that service level.

If, for a particular criterion, Service Desk does not find a service level, the search is repeated recursively for each parent configuration item up the configuration item hierarchy. This search is only performed if the configuration item entered in the incident is unique, and the search is restricted to unique parents up the hierarchy.

## **Including Operations Management and Underpinning Services in Service Structures**

When establishing a service structure, the service level manager can choose to include or exclude operations management and underpinning services.

The inclusion of operations management services in a service structure is more appropriate for relatively complex IT infrastructures where the management of resources is split into specialist areas of competency (for example, separate departments responsible for network, database, and server management). Service level management processes may not benefit from the inclusion of operations management services in the case of relatively simple IT infrastructures.

The inclusion or exclusion of operations management services also influences the type of service level that is automatically retrieved into incidents:

- In service structures that include operations management services as well as business services, the retrieved service levels tend to reflect the event resolution time to which an operations management service provider needs to respond to meet its obligations to the business service providers. These commitments tend to be more stringent than those between business service providers and their customers.
- In service structures that contain only business services, the retrieved service levels tend to reflect the event resolution time to which a business service provider needs to respond to meet its obligations to customers.



## Creating Effective Service Level Agreements

A service level agreement (SLA) specifies the contents of an agreement by which an IT service provider delivers a service to a customer. Although applying SLAs is a feature of Service Desk, you can also implement Service Desk without detailing service level management processes.

Service level agreements are applicable between the actual start and finish dates. To reduce administration, you can create an SLA for several receivers. Another option available to you is to use templates to create new service level agreements as needed.

Take care when creating new service level agreements on-demand when using templates. SLAs defined on-demand may offer services which differ from your overall service level policy.

The following figure shows how a simple SLA is used to define when an e-mail service is available to a customer:

**Figure 11-7** Service Level Agreement

The screenshot shows the '1 - Service Level Agreement' window. The interface includes a menu bar (File, Edit, View, Tools, Actions, Help) and a toolbar with icons for Save and Close, Print, Copy, Paste, Undo, Redo, and Help. The main area is divided into several sections:

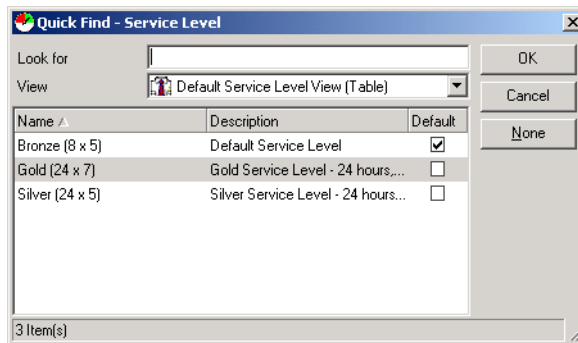
- General:** ID: 1, Name: E-mail (24 x 7), Status: Active.
- Description:** E-mail agreement for 24 x 7.
- Information:** SLA for full e-mail.
- Scope:** This service is limited to 75 e-mail users. A higher number of users will lead to renegotiation of the price.
- Provider Orga...:** IT Service BU.
- Applied time zone:** Provider (selected), Receiver (unselected).
- Service:** E-MAIL.
- Service Level:** Gold (24 x 7).
- Actual Start:** 24/9/00 13:0.
- Actual Finish:** 25/9/02 13:0.
- Price:** \$ 5,000.00.
- Term of Payment:** Yearly.
- Evaluation Period:** 3 Months.
- Account Mana...:** Rousel, Alan.

---

## Defining Hours for Service Level Agreements

Your organization may offer different levels of service based on hours of service availability. For example, in the following figure, you see that bronze level of service is defined as 8 hours per day, 5 days per week. Gold level would provide service 24 hours per day, 7 days per week. Silver level would provide service 24 hours per day, 5 days per week.

**Figure 11-8** Hours of Service



A service provider and service receiver may be located in different time zones. When you supply a service to a customer, the SLA specifies whether the support hours apply to the time zone of the service receiver or to the service provider.

## Developing Service Level Agreements

Service level agreements have always existed in IT infrastructure even when end-users were not aware of their existence. Customers believed that agreements were created by IT departments without their input and were based on performance measurements that they did not understand. Today, SLAs need to begin with your end-user's requirements as well as meet your IT infrastructure requirements.

Effects of low quality service are hard to quantify but the potential costs are relatively high. If a customer's IT infrastructure has an availability rate of 80%, that means 20% of the time they are non-productive. Multiply this percentage by the number of IT users, and then you can realize the total loss to the organization. IT technology should be embraced to improve a customer's business. When customers do not trust their technology, due to poor service levels, they will not attempt to maximize their resources.

IT personnel frustration is another consequence of poor service. IT staff unable to meet customer demands see their jobs as an ordeal rather than a rewarding occupation. Trained and experienced staff become stressed and leave the company. Lack of service results from the lack of good data concerning the perception and quality of the personnel.

The solution to poor quality and service is to implement service level agreements.

The first step in developing an SLA is to speak with both your customer's IT business owners and your IT service desk personnel. By speaking to your customers, you can learn what they consider to be a typical service call and what response they expect. When speaking to your customers, discuss their needs in terms of their processes and procedures and relate to the technology terms of the end-user.

Meet with your IT help desk staff to define all elements of the service level agreement. There should be a consensus from all Service Desk roles that they can meet the expectations of the customer. If any elements of the SLA are not clearly understood, they should be redefined with your help desk personnel in mind. Without consensus from your help desk personnel, service level agreements can never be met.

## SLA Elements

Service level agreements should contain the following elements:

- **Statement of intent**  
Describe how the SLA will be used by your organization and your service users.
- **Description**  
Describe the service covered by the SLA.
- **User environment**  
Describe who will use the service and how the service will be used.
- **Service status notification**  
Describe how the status of a service will be communicated to your customers. For example, will you use SLA reporting, e-mail, or an HTML browser?
- **Business impact**  
Describe the impact to the customer if response times and availability expectations are not met. These impacts might include service-user labor costs, dissatisfied customers, lost productivity, lost opportunities, lost revenue or lost credibility. These costs should be, if possible, quantified in terms of costs.
- **Measurement**  
Explain the actions your organization will take to monitor your response level to service calls. One way to do this is to hold regular performance reviews. SLA evaluation reporting provides your organization and your service users with quantifiable feedback on the success of your service commitment level. The reports can also be used by the problem and change managers to identify trends towards potential incidents and service calls that can be eliminated. With these measurable facts, you can identify actions for improvement, allocate resources more effectively, and justify costs. (See “Evaluating Service Level Agreements” on page 181.)

---

**TIP**

For additional information on the procedure to add SLAs to Service Desk, please refer to Service Desk Online Help.

---

## Evaluating Service Level Agreements

Evaluating the performance of the service delivered by an SLA is an important element of the service level management process. Service Desk provides features that support this function. Service level managers can do the following:

- Define Service Desk metrics that determine the types of performance evaluations to be made. You can measure service availability, analyzed performance, and planning performance.
- Register performance targets in each SLA. For example, an SLA can register a minimum target service availability of 95% measured over service support hours, with a minimum MTBF (that is, mean time between failure) of 5 hours.
- Schedule SLA evaluation reports to be generated at regular intervals.
- Produce pre-run evaluation reports that anticipate the result of a final (scheduled) evaluation report.
- Use the negative indications included in the results of a pre-run or final report to investigate events responsible for diminishing service level performance.

### Internal and External Evaluations

Evaluation reporting can be used in two different ways, depending on whether the service covered by the SLA is a business service or an operations management or underpinning service:

- Business services can be evaluated to provide your service users with quantifiable measurements that show how well your organization is meeting its service commitment level.
- Operations management and underpinning services can be evaluated so that you can review how effectively the providers of these services are meeting their service commitment levels.

## **Types of Performance Evaluations**

Several types of evaluation report can be produced. For further information on how Service Desk calculates performance, and for instructions on how to set up evaluation reports, please refer to Service Desk online help.

### **Service Availability**

This report measures the following aspects of service availability:

- The amount of time the service was available, displayed as a percentage of total time. Availability can be calculated based on service support hours or on calendar time (that is, independent of support hours).
- The mean time between failure (MTBF), which is defined as the average length of time between events that constitute service failure.
- The number of events (service calls or incidents) registered during the evaluation period.
- The number of events with an impact equal to or higher than the failure impact code.

### **Analyzed Performance**

This report measures the following aspects of the support organization's ability to analyze events:

- The average pickup time measures the average time needed for the support organization to start working on a service call or incident.
- The average solution time measures the average time needed for the support organization to solve service calls and incidents.

### **Planning Performance**

This report measures the following aspects of the support organization's ability to plan the resolution of events:

- The number of calls over duration measures the number of logged calls that were not resolved within the planned duration.
- The number of calls that passed their deadline measures the number of logged calls that were not resolved within the maximum duration.

## **Incorporating Service Performance Safety Margins**

If you establish a service hierarchy that contains operations management (and possibly underpinning) services as well as business services, you can use the evaluation reporting features of Service Desk to introduce the most cost-effective service performance safety margins into your IT support model. You do this by judicious negotiation of minimum availability targets for all the services involved.

In general, it is advisable to ensure that the minimum availability targets promised to you by your operations management and underpinning service providers are higher than those you promise for the delivery of business services to your service users. The greater the gap between the target level for a business service and target levels for the operations management services that support it, the higher the service performance safety margin. Conversely, the smaller the gap, the higher the risk that your organization is unable to meet its service commitment levels.

## **Integrating with HP OpenView Internet Services (OVIS)**

The HP OpenView Internet Services integration enables you to combine the operational monitoring capabilities of HP OpenView Internet Services with the capabilities of Service Desk to manage the administration of SLAs.

The integration enables you to do the following:

1. Enter Internet Services metrics in an SLA.

The metrics specify details of the availability conditions, targets and locations to be monitored by Internet Services.

2. Create a configuration file that contains the metrics, details of customers, and the service associated with the SLA.

3. Import the configuration information into Internet Services.

4. Set up a smart action that launches the Internet Services dashboard from within the currently opened SLA in Service Desk.

The dashboard displays operational monitoring information according to the metrics that were defined in the SLA and exported to Internet Services.

For more information on how to specify Internet Services metrics in an SLA, refer to the Service Desk online help. For instructions on how to integrate Service Desk with HP OpenView Internet Services, please refer to HP OpenView Service Desk: Data Exchange Administrator's Guide.



## Identifying Related Service Desk Roles

Service level managers directly affect the work of other Service Desk roles:

- **Configuration Manager**  
Service level agreements determine the levels of service required from the CIs managed by the configuration manager.
- **Help Desk Personnel**  
When help desk personnel register service calls, Service Desk notifies the help desk operator of the level of service available for a particular service. The first-line level of support that a help desk operator provides needs to be in line with the applicable SLA.
- **Change Managers**  
Change managers need to plan modifications to IT infrastructures within the boundaries of the SLAs that are in effect.
- **Problem Managers**  
While monitoring service calls and Incidents, problem managers need to keep in mind the boundaries of the SLAs that are in effect.

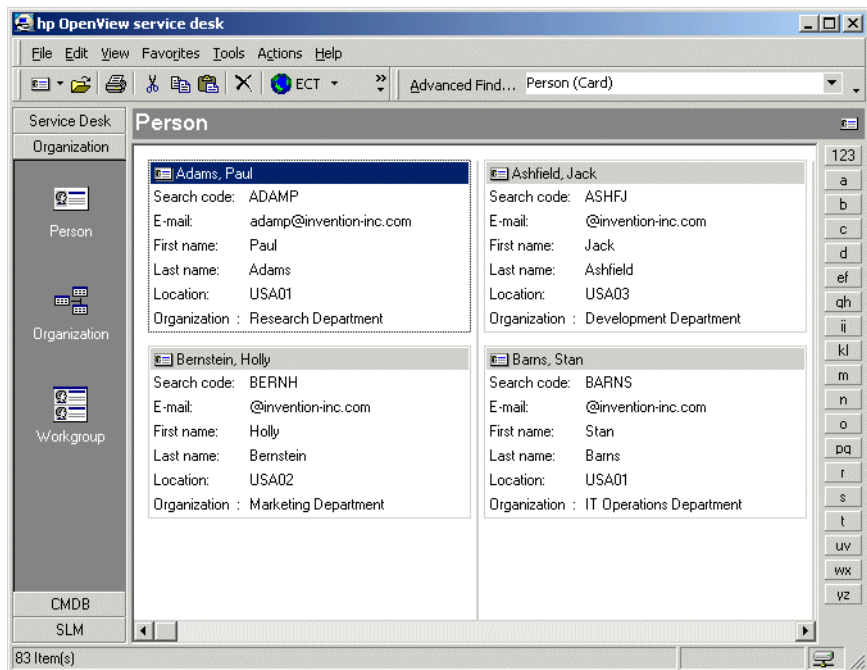
Service Level Manager Tasks  
**Identifying Related Service Desk Roles**



## Administering Personnel and Organizations

The Organization group on the Service Desk console is the work space for the personnel and organization manager:

**Figure 12-1** Organization Group View



The Organization group provides access to the following data views:

- Person
- Organization
- Workgroup

You can create person entries for your internal IT support personnel, contacts at internal or external organizations, and customers.

Once personnel have been registered, configuration managers can identify users, owners, and administrators of configuration items; help desk personnel can identify callers when registering service calls;

Service Desk users can assign items to individuals (for example, help desk personnel can assign service calls to specific specialists); approval requestors, initiators and voters can be identified, and so on.

Most organizations consist of various departments. By arranging your person entries according to the same departments within your organization, you can evaluate the performance of a department in terms of service calls. You can also relate departments to your employees.

## **Categorizing Persons and Organization Entries**

Before you create entries for persons and organizations in Service Desk, you should define the scope of your data. You should first consider how internal and external organization data should be compiled and entered. If you decide to enter the data on an as-needed basis, you must determine a person or group responsible for creating organizational data.

Decide which Service Desk roles should be authorized to create and update organizational data, and coordinate with your system administrator to apply the appropriate authorizations. Authorization should be dependent on the tasks and information needs of each role.

Before implementation, you should decide on a consistent nomenclature system for organization search codes. A well-chosen search code that is consistently used for all entries simplifies the task of looking up organizations when Service Desk is used.

After you have considered your organization entries, you can define required data for person entries. When creating relations between person entries and external organization entries, you should define a policy for private information, such as telephone and e-mail addresses, which is consistent with the legal statutes in your country. For example, requiring information such as a private telephone number in all entries might violate privacy laws in your country.

Finally, you should develop a categorization system to distinguish between different person entries, organization entries, and workgroup entries. For example, you may want to identify contractors separately from employees and create a Contact category for your customers.

## Registering Persons and Organizations

Registering internal personnel is important for tracking hours worked on service calls. For example, by assigning the employees you enter to CIs, service calls and requests, you can schedule them for given service operations and afterwards monitor their response time.

---

### NOTE

When creating a search code for a person or organization entry, the code must be unique and can consist of letters, digits or both. Unlike descriptions, codes are definitive as soon as you have created them. The only way to change a code is to remove it and then create a new one.

When creating entries for private data of employees or customers, consider the privacy laws of their countries.

---

### Creating Person Entries

When you create a person entry, a form similar to the following appears on your console:

Figure 12-2

### New Person Entry

The screenshot shows a software window titled "Bickerstaffe, Amanda J. - Master Person". The window has a menu bar (File, Edit, View, Tools, Actions, Help) and a toolbar with icons for Save and Close, Print, Copy, Paste, and other functions. The form is divided into two main sections. The left section contains fields for "Search code" (BICKA), "Full name" (First name: Amanda, Middle name: J., Last name: Bickerstaffe, Title: Mrs.), "Name" (Bickerstaffe, Amanda J.), "Initials" (A.B.), "Organization" (Invention Incorporated), "Telephone number" (+1 610 3456757), "Pager Number", "E-mail" (a\_bickerstaffe@invention-inc.com), "Employee number" (53341400), and "Identification numb...". The right section has tabs for "General", "Address/Phone", "Workgroups", "CI Admin /User", and "CI Owner". The "General" tab is active and contains fields for "Status" (Active), "Category" (Employee), "Account" (Bickerstaffe), "Folder", "Location" (USA01), "Time Zone" (Eastern Standard Time (New York)), "Job title" (General Manager), "Gender" (Unspecified, Male, Female), "Date of Birth" (03 November 1966), and a "Remark" text area.

The following fields are always required:

- Search Code

You should create a system of search codes that enables other Service Desk users to quickly retrieve person entries. For example, a help desk operator is more likely to consistently enter codes created by last name, or a last name plus initials.

- Name

The Name field enables you to register the person's name in the way it is displayed, for example, in card views. Full details of the person's name (comprising first, middle and family names, title and suffix) should be entered in the Full Name field.

---

**NOTE**

Other fields may also be mandatory, as determined by your IT infrastructure management in cooperation with the Service Desk system administrator. By default, mandatory fields are displayed in a bold font. You can change the appearance of mandatory fields to help identify them.

---

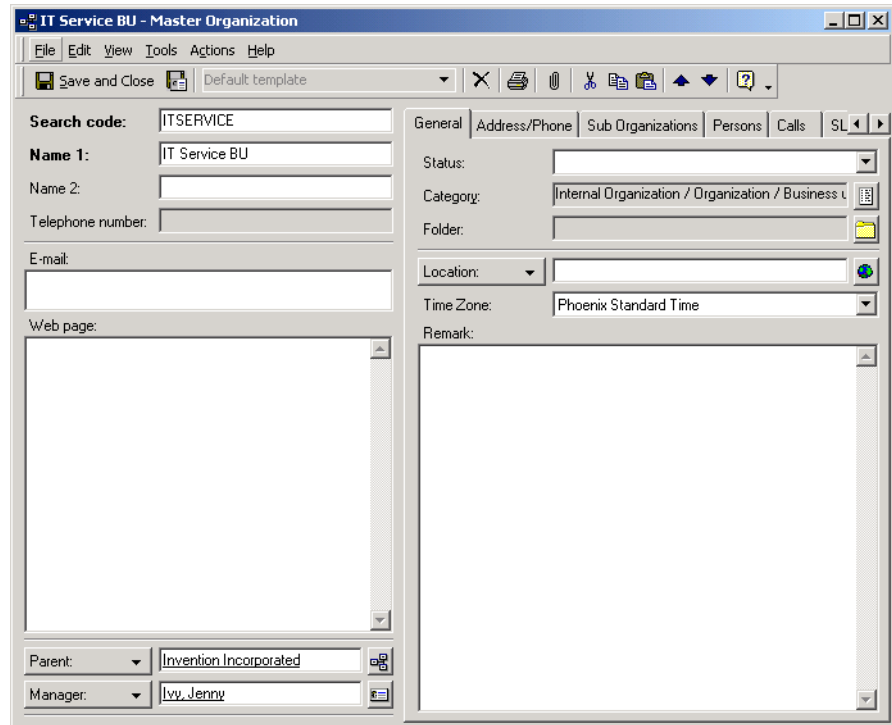
**Creating Organization Entries**

When you create an Organization entry, a figure similar to the following appears on your console:



Figure 12-3

### New Organization Entry



The screenshot shows a software window titled "IT Service BU - Master Organization". The window has a menu bar with "File", "Edit", "View", "Tools", "Actions", and "Help". Below the menu bar is a toolbar with icons for "Save and Close" and "Default template". The main area is divided into two columns. The left column contains input fields for "Search code:" (ITSERVICE), "Name 1:" (IT Service BU), "Name 2:", "Telephone number:", "E-mail:", and "Web page:". The right column has a tabbed interface with tabs for "General", "Address/Phone", "Sub Organizations", "Persons", and "Calls". The "General" tab is selected and contains fields for "Status:", "Category:" (Internal Organization / Organization / Business Unit), "Folder:", "Location:", "Time Zone:" (Phoenix Standard Time), and "Remark:". At the bottom of the window, there are two dropdown menus: "Parent:" (Invention Incorporated) and "Manager:" (Ivy, Jennv).

### Creating Workgroup Entries

Workgroups provide a way of organizing your IT specialists into functional groups. When assigning a service call to have it resolved, it can be assigned to a workgroup. The details of the workgroup include the names of the individual personnel within it. Each member is capable of performing the same tasks.

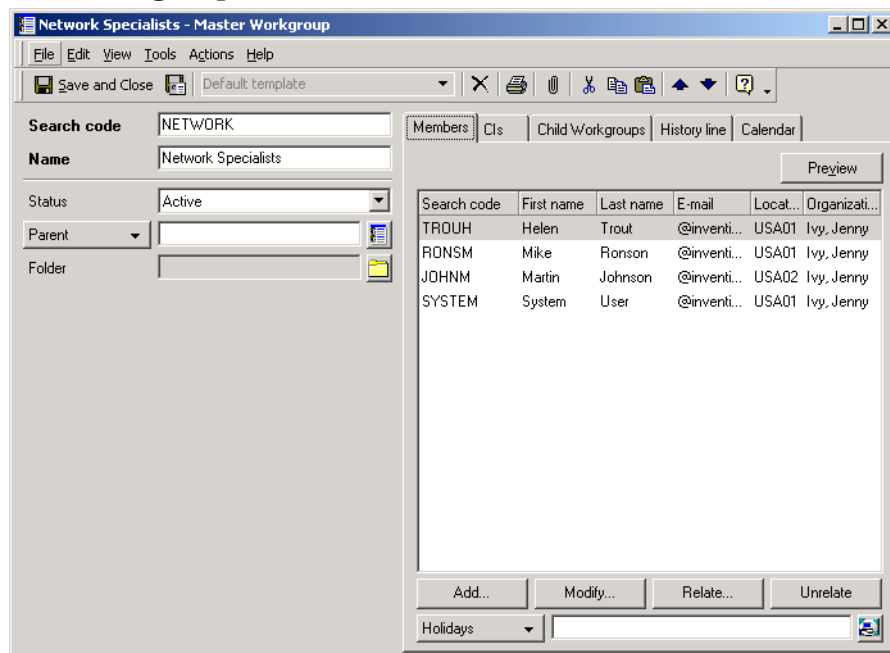
When defining workgroups, you may create a naming system that reflects the area of expertise. For example, you may decide to name one workgroup Help Desk and another workgroup Network Technicians.

Because personnel in your IT infrastructure may have several specializations, specialists can be members of many different workgroups. Specialists can also be members of workgroups that span geographical locations. A workgroup may include contractors from external organizations as well as internal departments.

When you create a workgroup, a form similar to the following appears on your console:

**Figure 12-4**

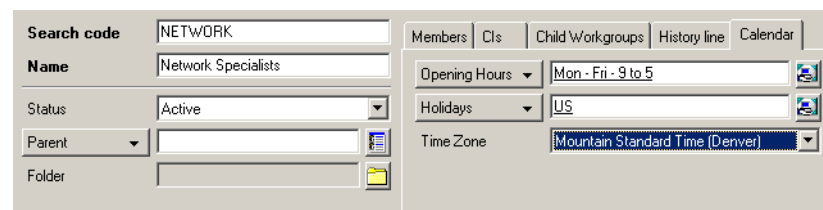
### New Workgroup



A calendar can be added to a workgroup. The calendar provides information necessary for performing planned time estimates when assigning work to a workgroup. The calendar contains an Opening Hours schedule showing when the workgroup is providing support, and a Holidays schedule showing the holidays the workgroup will not be working:

**Figure 12-5**

### Workgroup Calendar



---

# **13** **Service Desk Administrator Tasks**

This chapter provides a brief overview of the administrator roles in Service Desk.

## **Performing Administrator Tasks**

There are two administrator roles within Service Desk: system administrator and application administrator. The application administrator determines the menus and actions available in Service Desk as it appears to your IT personnel and the system administrator manages all system settings: authorizations, role definitions, defaults, templates, and any other system settings required for Service Desk to operate. Depending on your personnel resources, the system and application administrator duties can be performed by the same individual or by several people.

In cooperation with the persons and organizations manager, the system administrator determines all authorizations. The administrator must create accounts for all Service Desk users based on their person entry.

First, the system administrator must create a login name. The login name may be the same as the person entry search code but this is not a requirement. The system administrator must also create a password for the user to log on to Service Desk or Service Pages for the first time.

If the user is a help desk employee, the system administrator will need to identify the user's roles. For further information on defining Service Desk roles, refer to the HP OpenView Service Desk: Administrator's Guide.

### **Determining Service Desk Role Privileges**

For each configured Service Desk user, the system administrator determines the user's specific role. In defining roles, each Service Desk user should have clearly defined responsibilities. For example, you may want to prevent a help desk operator from creating change requests. The system administrator, however, automatically has the maximum scope of an administrator, and can access any area for which another Service Desk role is responsible.

## Creating Templates and Actions

When creating templates and actions, the system administrator should discuss the settings with the appropriate process owners. Within this context, the system administrator can enter the default values. For example, if IT infrastructure management would like one new employee template for contractors and one for permanent employees, the system administrator should consult with management to determine their exact specifications.

Carefully chosen template settings can simplify the work of Service Desk users. For example, when creating templates for configuration items, the value entered in the search code field can be used as a building block to define search codes for configuration items created using the Generate CI Wizard (see “Using the Generate CI Wizard” on page 113).

A template should be created with the intended users’ input, otherwise a template that does not meet the users’ needs may result.

## Archiving Information

The amount of information Service Desk accumulates increases the longer Service Desk is used. As the quantity of information builds up, it occupies more and more space on the production database, and in extreme cases can cause Service Desk performance to diminish.

Archiving is particularly useful for information that is too useful to discard, but is not accessed frequently enough to justify the space it occupies and the impact it has on performance. For example, a service call may be resolved and closed, but deleting it would delete information about investigations into the underlying issues and the solution implemented.

When information is archived, it is copied to a predetermined archive folder before being deleted from the production database. The archived information is stored in XML format.

Archived information can be viewed using any XML browser.

Archiving can be scheduled to take place regularly via an external scheduler, or can be performed immediately as a low-priority process.

---

### NOTE

Ensure that information is not archived or deleted until it no longer contributes to other Service Desk processes. For example, incidents and service calls should not be archived or deleted until they no longer contribute to SLA evaluation results.

---

Administrators can control the following:

- The types of item to be archived. Work orders, changes, projects, problems, service calls, and incidents can be archived
- The criteria used to determine what information is archived. Any combination of conditions that can be set up in a Service Desk data view can be used, such as items that are currently in a particular status, items that were created on or before a particular date, items whose actual finish date is some time during the previous month, and so on.

- The attributes that are archived (for example, you may want to archive the Description, Information, and Solution attributes when archiving service calls). Any simple attribute can be included. Attribute sets (that is, attributes that hold their values in lists, such as the approvers on an approval sheet) cannot be included in the view. However, certain attribute sets (including history lines) can be archived. Attachments can also be archived.
- The time zone used for archived date-time information.

## Creating Reports Using Third-Party Tools

The delivery of business-critical IT services depends on prompt decision making. Steps within the IT management process may need to be reviewed to monitor agreed-upon service levels. When reviewing IT management processes, it is counter-productive and time-consuming to manually track issues.

Using Service Desk, you can create reports that provide an effective method of managing your IT management processes.

### Overview of Reporting

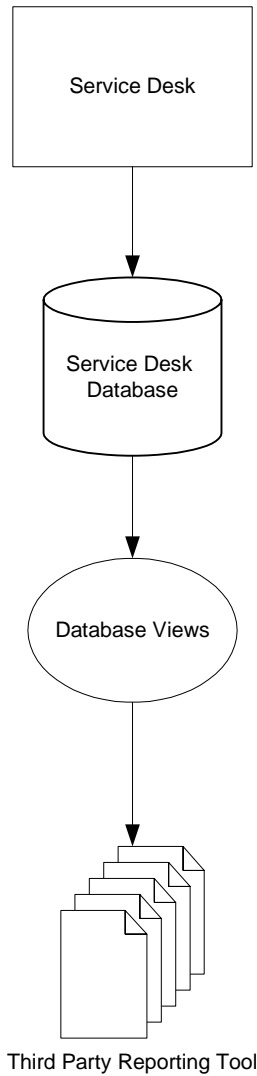
Reporting provides flexibility and convenience for reviewing past, managing current, and forecasting future infrastructure needs. For example, you want to monitor the performance of a configuration item. By printing a report of all service calls for a particular CI, you can view statistics on the average availability of a CI based on any specified time period.

The information in your Service Desk database can be used as a basis to create professional reports in a third-party reporting tool, as depicted in Figure 13-1. Your reporting tool, such as Business Objects, Crystal Reports, Microsoft Access, or Microsoft Excel, can access the information stored in Service Desk when you create database views and a data dictionary.

For detailed information on reporting, see the *HP OpenView Service Desk: Administrator's Guide*.



**Figure 13-1**      **Reporting Process**





**Symbols**

#Approvers Req  
approval status, 55

**A**

actions  
smart link, 81  
system, 81  
Actions menu  
using, 81  
activator  
approval roles, 56  
Administrator Console, 67  
Advanced Find  
using, 82  
Application administrator, 95  
application administrator, 196  
approval  
roles, 56  
sheet, 54  
status, 54  
voting, 53  
approval activator  
approval roles, 56  
approval initiator  
approval roles, 56  
approval monitor  
approval roles, 56  
approval roles  
approval activator, 56  
approval initiator, 56  
approval monitor, 56  
approver, 56  
approval status  
# Approvers Req, 55  
approval, 55  
approval votes, 55  
deadline, 54  
inactive, 52  
result, 55  
strategy, 55  
approval votes  
approval status, 55  
approver  
approval roles, 56

**B**

best practices  
see also ITIL, 50

business services, 167  
button bar, 32

**C**

card views  
using, 79  
CCTA, 38  
change, 40  
management, 39  
change manager  
Service Desk role, 42  
chart views  
using, 76  
checklists  
running, 98  
configuration  
management, 39, 40  
configuration item, 40  
configuration manager  
Service Desk role, 42  
Console  
Service Desk, 31  
contact person  
Service Desk role, 42, 43  
tasks, 95  
contact person role  
helpdesk operator, 43  
control  
error, 45  
incident, 45  
problem, 45  
customer  
Service Desk role, 42, 43

**D**

data view, 32  
deadline  
approval status, 54

**E**

error  
control, 45  
known, 40  
explorer views  
using, 78

**F**

Frequently Asked Questions  
SP, 91

---

# Index

## H

helpdesk operator  
  contact person role, 43  
  tasks, 95

## I

incident, 39  
  control, 45  
  management, 39  
initiator  
  approval roles, 56  
item  
  configuration, 40  
ITIL, 38, 39

## K

known error, 40

## M

management  
  change, 39, 40  
  configuration, 39, 40  
  incident, 39  
  problem, 39, 40  
  project, 40  
  service level, 39, 40  
menu bar, 32  
monitor  
  approval roles, 56

## O

operations management services, 167  
organization  
  group, 188  
  Service Desk role, 42

## P

person  
  entry, 190  
person and organization manager  
  Service Desk role, 42, 47  
problem, 40  
  control, 45  
  management, 39, 40  
problem manager  
  Service Desk role, 42, 45  
project views  
  using, 80

## R

reporting, 200  
result  
  approval status, 55  
role  
  persons and organization, 196  
roles  
  approval, 56  
  Service Desk, 42

## S

service call  
  registering, 91  
  subcontract, 99, 128  
Service Desk  
  Console, 31  
  roles, 42  
Service Desk console, 69  
Service Desk role  
  change manager, 42  
  configuration manager, 42  
  contact person, 42, 43  
  customer, 42, 43  
  organization, 42  
  person and organization manager, 42, 47  
  problem manager, 42  
  problem managers, 45  
  service level manager, 42, 46  
  specialist, 42, 44  
  user, 42  
Service Desk roles  
  privileges, 196  
service level  
  automatic retrieval in incidents, 173  
  management, 39, 40  
service level agreements  
  creating, 177  
  defining support hours, 178  
  developing, 179  
service level manager  
  Service Desk role, 42, 46  
Service Pages, 71  
  user tasks, 91  
service relations  
  establishing, 169  
  managing-managed, 168  
  parent-child, 168  
  supporting-supported, 168  
  underpinning-underpinned, 168

- using-used, 168
- valid, 169
- services
  - business, 167
  - operations management, 167
  - relations, 167
  - structuring, 166
  - types, 166
  - underpinning, 167
- shortcut bar, 32
- specialist
  - Service Desk role, 42, 44
- specializations
  - and Service Desk roles, 44
- status
  - approval, 54
- strategy
  - approval status, 55
- system actions, 68
- system administrator, 196

## **T**

- table views
  - using, 74
- tasks
  - contact person, 95
  - helpdesk operator, 95
- template, 69
- title bar, 31
- tool bar, 32

## **U**

- underpinning services, 167
- user
  - Service Desk role, 42
  - tasks, 91
- users
  - Service Desk roles, 42

## **V**

- views
  - card, 74
  - chart, 74
  - explorer, 74
  - project, 74
  - table, 74
  - tree, 74
- voting
  - approval, 53

## **W**

- workgroup, 193

