HP OpenView Service Desk 4.0

User's Guide

First Edition

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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 16 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 25 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 65 describes tasks basic to your IT infrastructure personnel.
- Chapter 5, “Customer Tasks,” on page 75 describes the user role and associated tasks in Service Desk.
- Chapter 6, “Help Desk Personnel Tasks,” on page 79 describes the contact person role and associated tasks in Service Desk.
- Chapter 7, “Configuration Manager Tasks,” on page 91 describes the configuration manager role and associated tasks in Service Desk.
- Chapter 8, “Specialist Tasks,” on page 101 describes the role of the Specialist and associated tasks in Service Desk.
- Chapter 9, “Change Manager Tasks,” on page 109 describes the role of the change manager and associated tasks in Service Desk.

- Chapter 10, “Problem Manager Tasks,” on page 123 describes the role of the problem manager and associated tasks in Service Desk.
- Chapter 11, “Service Level Manager Tasks,” on page 131 provides hints and tips on defining service levels for the service level manager role.
- Chapter 12, “Persons and Organization Administrator Tasks,” on page 149 describes the role and responsibilities of the human resources administrator.
- Chapter 13, “Service Desk Administrator Tasks,” on page 157 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

Edition and Revision Number	Issue Date	Product Release
First Edition	August 2001	Service Desk 4.0

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 4.0. 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` file on the Service Desk CD-ROM contains information that will help you get started with Service Desk. It also contains any last-minute information that became available after the other documentation went to manufacturing.
- 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 4.0 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 4.0 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 4.0.

  The Supported Platforms List is available as a PDF file on the HP OpenView Service Desk 4.0 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 4.0 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 4.0 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 4.0 CD-ROM. The file name is `Data_Exchange.pdf`.

- The *HP OpenView Service Desk: VantagePoint Operation Integration Administrator's Guide* explains the integration between Service Desk and VantagePoint 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 VantagePoint Operation Integration Administrator's Guide is available as a PDF file on the HP OpenView Service Desk 4.0 CD-ROM. The file name is `VPO_Integration_AG.pdf`.

- The *HP OpenView Service Desk: Migration Guide* provides a detailed

overview of the migration from ITSM 5.7 to Service Desk 4.0, 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 4.0 CD-ROM. The file name is `Migration_Guide.pdf`.

- The *HP OpenView Service Desk: API Programmer's Guide* contains information that will help you create customized integrations with Service Desk. This guide depicts the API structure, and explains some of the basic functions with examples for using the Application Programming Interface (API) provided with Service Desk. The API extends the HP OpenView Service Desk environment by providing independent programmatic access to data-centered functionality in the Service Desk application server environment.

  The API Guide is available as a PDF file on the HP OpenView Service Desk 4.0 CD-ROM. The file name is `API_pg.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 4.0 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 4.0 CD-ROM. The file name is `Data_Dictionary.htm`.

- The *HP OpenView Service Desk 4.0 Computer Based Training* (CBT) CD-ROM is intended to assist you in learning about the functionality of HP OpenView Service Desk 4.0 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 4.0 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 4.0 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

Typographic Conventions

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

Font	What the Font Represents	Example
Italic	References to book titles	See also the *HP OpenView Service Desk: Installation Guide*.
	Emphasized text	*Do not delete* the System user.
Bold	First-time use of a term that is explained in the glossary	The **service call** is the basis for incident registration.
`Courier`	Menu names	You can adjust the data view with the commands in the `View` menu.
	Menu commands	Choose `Save` from the menu.
	Button names	Click `Add` to open the Add Service Call dialog box.
	File names	To start the installation, double-click `setup.htm`.

	Computer-generated output, such as command lines and program listings	If the system displays the text
		`C:\>dir a:`
		`The device is not ready`
		then check if the disk is placed in the disk drive.

`Courier bold`	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`**.
`Courier italic`	Replaceable text: text that you must replace by the text that is appropriate for your situation	Go to the folder *X*:\\Setup, where *X* is your CD-ROM drive.

Font	What the Font Represents	Example
Helvetica bold	Keyboard keys A plus sign (**+**) means you must press the first key (**Ctrl** in the example), hold it, and then press the second key (**F1** in the example).	Press **Ctrl+F1**.

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

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

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 that will extend the capabilities of your IT department.

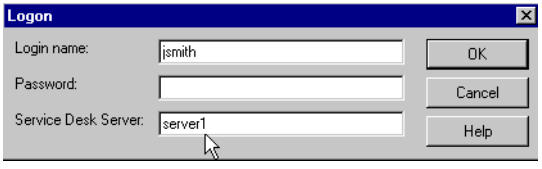
Starting Service Desk

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 Connection Wizard automatically begins as illustrated in Figure 1-1. You will be asked to create a database connection using the wizard:

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 you will see the Service Desk console. If database connection information is on your hard drive but is incorrect, a Logon dialog box appears as illustrated in Figure 1-2.

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.

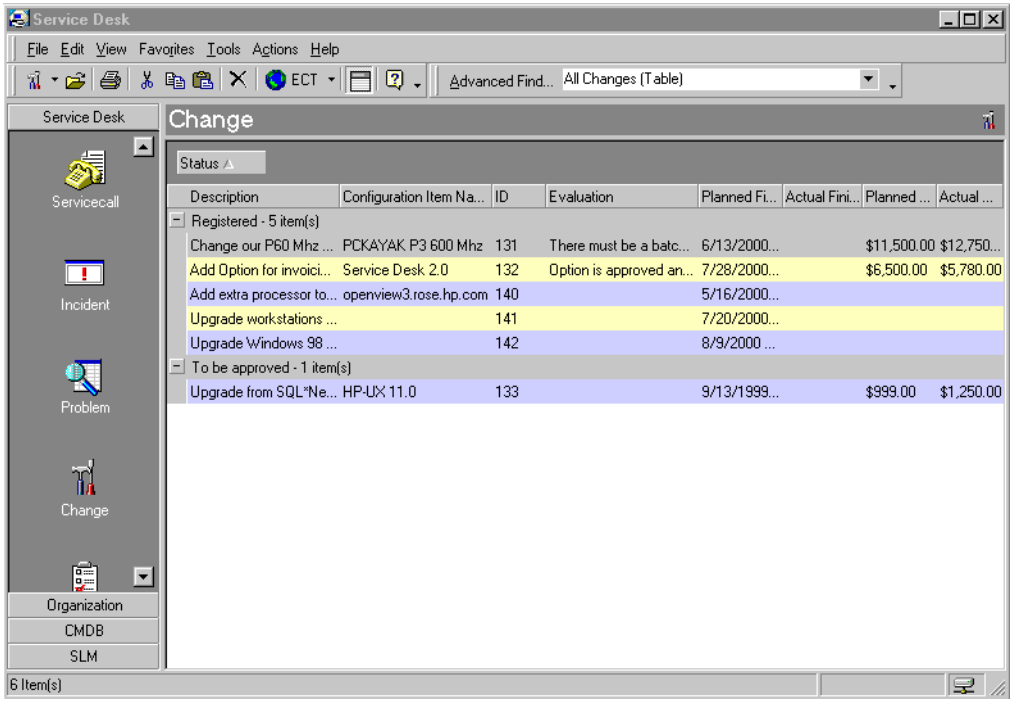
Navigating Through Service Desk

The Service Desk Console

The starting point for most tasks within Service Desk begins with the **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 information into the Service Desk database.

Figure 1-3 The Service Desk Console

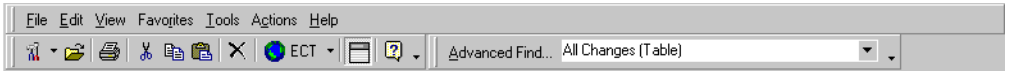


At the top of the console, you will see the **title bar**. The title bar states "Service Desk". At the right side of the title bar, you will see the standard Windows® buttons for closing and resizing the console window.

Figure 1-4 The Title Bar

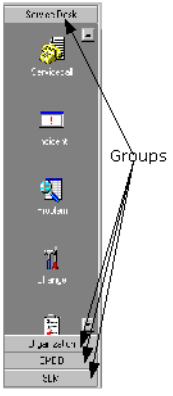
Below the title bar, you will see one or more **toolbars**. You use toolbars to start commands. There are two distinct types of toolbar: the **menu bar** and the **button bar**. In the menu bar, commands are represented by their names and are grouped in menus. In the button bar, the commands are represented 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 are customizable. The names of the commands and their location can be modified to suit the needs of your organization.

Figure 1-5 The Toolbars



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. Click a shortcut 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®.

Figure 1-6 The Shortcut Bar

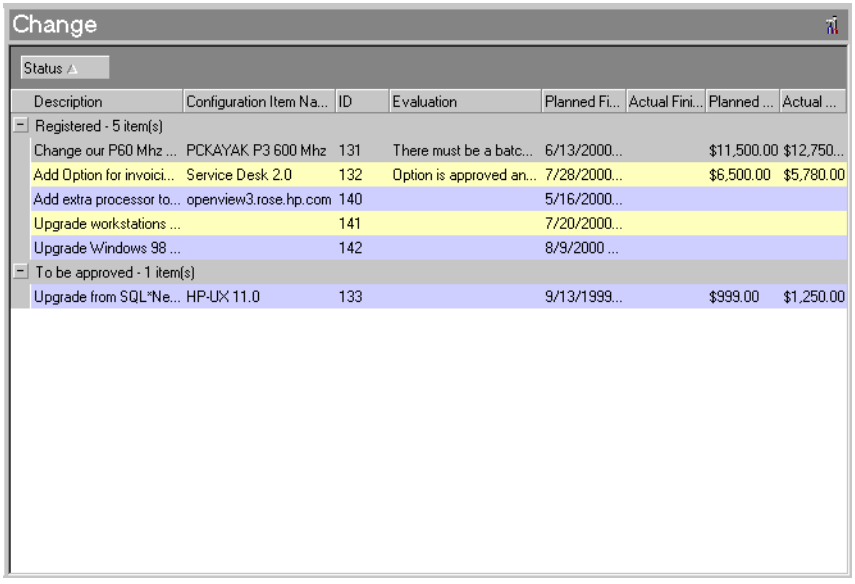


One or more shortcuts can be organized into groups. A **group** is a collection of shortcut icons. You can add, modify or delete groups to customize Service Desk to your business needs.

You can place the shortcut icons in groups, so you can find information quickly in Service Desk. You can always modify the contents of the shortcut bar.

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, an overview of all the changes in a certain network.

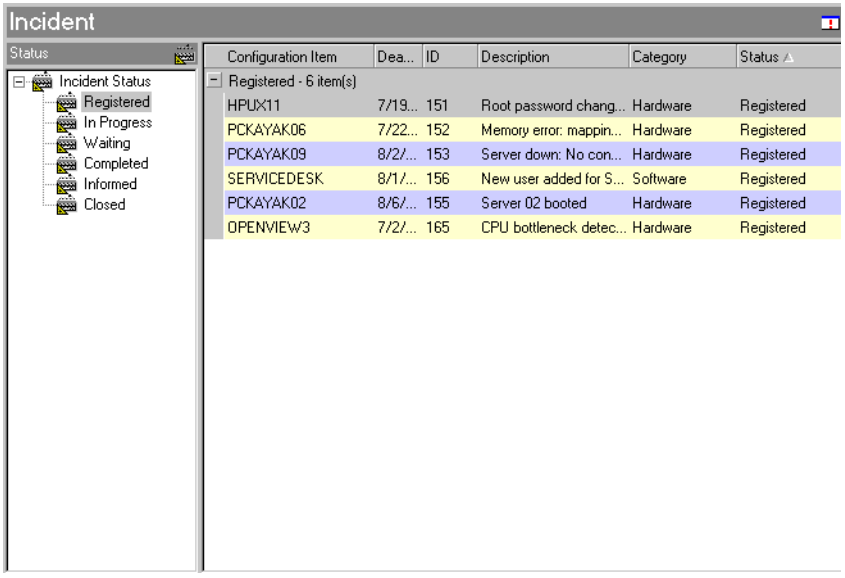
Figure 1-7 **Data View**



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

- a multirecord list containing preselected attributes next to each other and different records below each other. Figure 1-7 displays a multi-record view of changes. You can group the lines in the data view, by dragging and dropping one of the columns to the heading of the data view.
- a tree view with a multirecord listing, making navigation between a tree view. In Figure 1-8, the changes are shown in a tree view combined with multirecord listings. The tree view displays registered changes and changes waiting to be approved.

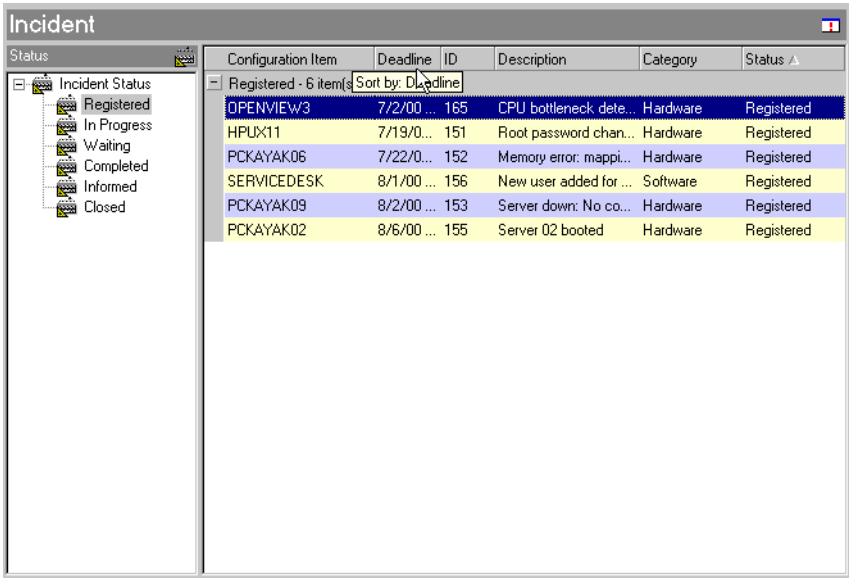
Figure 1-8 Data View in Tree Format



- a chart view displays information graphically in a number of different formats, including line charts, pie charts, and bar charts.
- a card view displays information as individual cards.
- an explorer view

The data view provides an overview of a list of records. You can edit one record by double clicking the item or line in the data view. You can also sort information displayed in a data view list by clicking the title groupings. By clicking `Deadline` as in Figure 1-9, the records will be sorted according to the deadline date.

Figure 1-9 Incidents grouped by deadline in data view



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 is an example of the cost effectiveness of a service. The service is the availability of a word processor when your child is not on 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:

- 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.

Ensuring Fast Data Response

To ensure rapid response, the amount of network traffic created by Service Desk is minimized.

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. A service desk 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, problem management, and so on.

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 ensures 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

An **incident** is an operational event which is not part of the standard operation of the system. **Incident management** is the process of documenting incidents and monitoring the incident until the standard operation of the system is restored. 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 the service.

A **problem** is a condition identified from multiple 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 incidents to identify the cause. Investigating and resolving

an unknown cause is part of incident resolution. However, where 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 the 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.

A **configuration item** (CI) is an item that represents an object in your IT infrastructure. Using this item, the employees of the company or your customers are able to perform their tasks to create the working environment. A configuration item is not only hardware but can also be the software. **Configuration Management** is the process of controlling and managing configuration items throughout the life cycle of the CI. The life cycle of the configuration item begins at the proposal of acquisition and ends with its disposal.

A **service call** is a record of a support request by a user about an IT service. The service call is created the moment the 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.

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.

The Service Desk Function

By consolidating the processes mentioned in the previous section, Service Desk provides the elements required to support the service desk function in accordance with ITIL principles.

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:

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

Users

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

A user in general will not know a support organization is using Service Desk. Users can contact their help desk by telephone, fax, email or HTML Web browser using Service Pages (SP). When using SP, the 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 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 scenarios 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 to resolve an event.

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, and 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:

- 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.

Scenario: Managing a Help Desk

The information technology manager of a large multinational company has responded to concerns expressed by the general manager. The IT manager is being asked to provide high-quality help desk service for users while, at the same time, reducing or maintaining current IT spending levels.

As the company expanded, its divisions spread across several continents. The method of registering service requests had difficulty coping with the increasing workload. This resulted in decentralization of the help desk. Each office selected their own method of handling service calls. As each office was connected by networks at different sites, when service calls were handled by individual offices related to networking problems, efforts by specialists were duplicated.

The IT manager is faced with managing help desks around the world but without a reliable means of registering service calls and managing problems.

In addition, the IT manager wants to define general help desk policies and create service level agreements. The IT manager, however, has no tools to accomplish this task. The company currently has written policies which are distributed via email to the various offices.

By using Service Desk, a help desk can be managed from a central location and service calls can be distributed to the appropriate specialists.

Service Desk can be customized to fit into any help desk environment. It is possible to apply service level agreements, manage configuration items and help desk policies to ensure that agreements are not violated while providing quality service.

3 Service Desk Features

This chapter describes some of the key features Service Desk provides to support the processes you choose to employ.

Scenario: A Customer Profile

Susan is a help desk supervisor at a company offering service-based solutions to small retail outlets. Services range from simple hardware sales to network setup and configuration with associated hardware and software. The company also provides ongoing day-to-day on-site support.

Susan's help desk system was 10 years old and completely inflexible. She would like to implement a service management tool which is more user friendly and more sophisticated than the current system. The new system needs to be flexible enough for out of the box implementation without sacrificing the ability to handle thousands of configuration items which were currently in use.

Susan selects Service Desk as the most cost effective means to create a centralized and coordinated help desk. She selected Service Desk because of the ease of implementation. Using the best-practices templates included with Service Desk, Susan was able to create a help desk which provided end-user satisfaction. Service levels have also increased because issues which can be solved using the Frequently Asked Questions using an HTML browser are resolved quickly.

The help desk has improved business practices and provided a Web interface for reporting service calls. Susan is able to provide her customers with a line of communication using an HTML browser they are familiar with to report service calls.

Introducing Ready-to-Use Policies and Tools

- Best Practices Templates

  Service Desk offers templates that can be configured and then used as part of your implementation. Using best practice templates speeds implementation and improves processes immediately.

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

- Complete integration with Microsoft® User Interface

  Training service desk personnel is a time-consuming exercise. Using an application with a familiar look and feel can reduce the learning curve considerably. HP OpenView Service Desk has a platform which is based on Microsoft technology that fully integrates with the Microsoft desktop. As a result, Service Desk minimizes the end-user training normally associated with new applications.

  The Microsoft Internet Explorer Web browser is also incorporated in the console, as illustrated earlier in Figure 1-3 on page 29. Your help desk staff, specialists and administrators can browse the Web and launch any application from the Service Desk console.

- Ability to easily create relations

  Changes, incidents, problems, service calls and templates can be related to each other in Service Desk. Creating a **relation** between items provides additional information and flexibility within your service desk.

NOTE Relations created between changes, incidents, problems and service calls are not the same as the relation created between configuration items (CIs) or **work orders**. Work orders are meant to be related to items to find solutions to problems.

- 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 provide agreed-upon service levels. Ensuring that

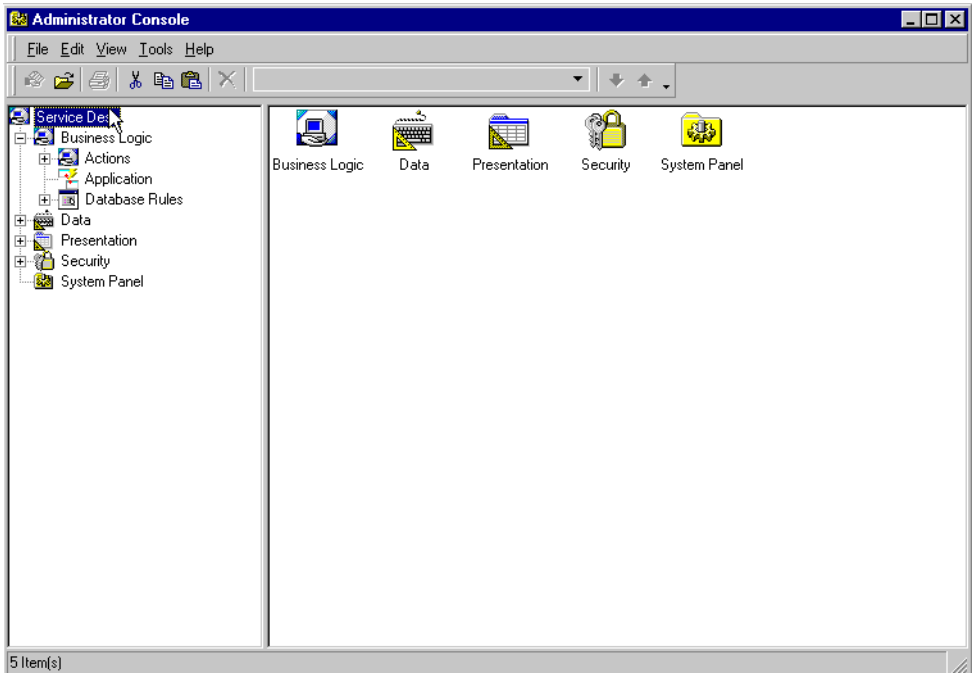
the appropriate specialists are involved in decision making before implementation is crucial to productivity. When authorizing IT management processes, it is counter-productive and time-consuming to manually track issues requiring action.

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

- Service Desk Console Flexibility

  The Service Desk console enables personnel to customize support information that they view. Helpdesk operators, specialists, administrators, and managers have the ability to create graphical charts, drag and drop information to another desktop application such as MS-Word or MS-PowerPoint using an interface similar to Microsoft Outlook. The layout designer provides organizations the flexibility to build their own screens, views, fields, and graphs without knowledge of programming. Data can be grouped, sorted and filtered without the time constraint of learning a programming language to do so.

Figure 3-1 Administrator Console View



The **Administrator Console**, depicted in Figure 3-1, is the tool which specifically provides flexibility in designing screens, views, graphs and fields. You can fine-tune the settings to your specific IT infrastructure needs to meet your service policies as your business demands change.

You can modify or create the following definitions with the Application Layout Designer:

— Actions

You can modify **smart actions** that are performed by Service Desk. Smart actions are shortcuts to additional tasks from external programs. An example would be using MS Excel for a report on all CIs.

System actions are shortcuts to actions designed by the Service Desk developers. System actions are too complex to be completed manually.

— Fields

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

— Forms

Using drag and drop actions, you can easily design forms.

— General settings

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

— Templates

In addition to the best-practices templates provided, you can create new templates to fit your specific IT infrastructures need. 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. The structure is common to all items. 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).

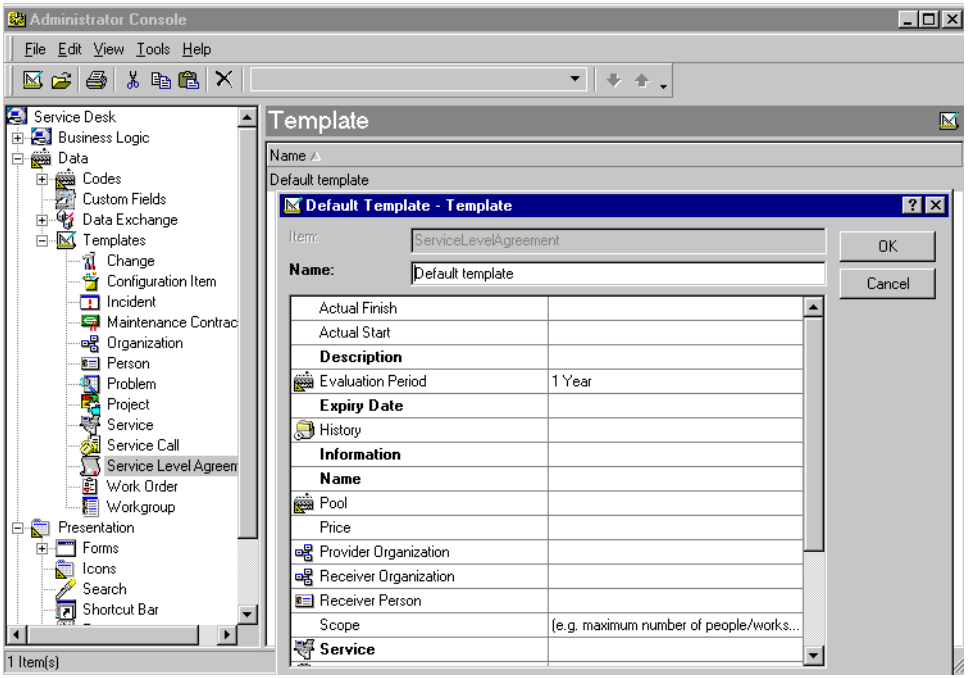
— Views

You can specify which table views, graph views and explorer views will be displayed for Service Desk users.

Accelerating Best Practices Implementation by Using Templates

The templates included with Service Desk allow you immediately to implement sound practices for your IT infrastructure. Whenever you create a new item, values are copied into it from the template. After the new item is created, you can edit the fields and enter further values in the new item.

Figure 3-2 An Example Template



For example, a template for Service Level Agreements (see Figure 3-2) can be used to apply a particular evaluation period each time a service level agreement is created. 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.

When editing templates for configuration items, the value 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.

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

Introducing Approval

Approval provides the ability automatically to 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.

When an action requires an approval, an approval sheet must be completed. 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 specialists who should authorize the action.

The status of the approval sheet should be changed from `Inactive` to `Active` to begin the approval process.

Approvers are notified that their votes are required by an active approval sheet within Service Desk in the Service Today view or by e-mail. Approvers can search for any action that requires their approval through Service Desk using the `More Choices` tab page on the `Advanced Find` dialog box (displayed by selecting `Advanced Find from the Tools` menu).

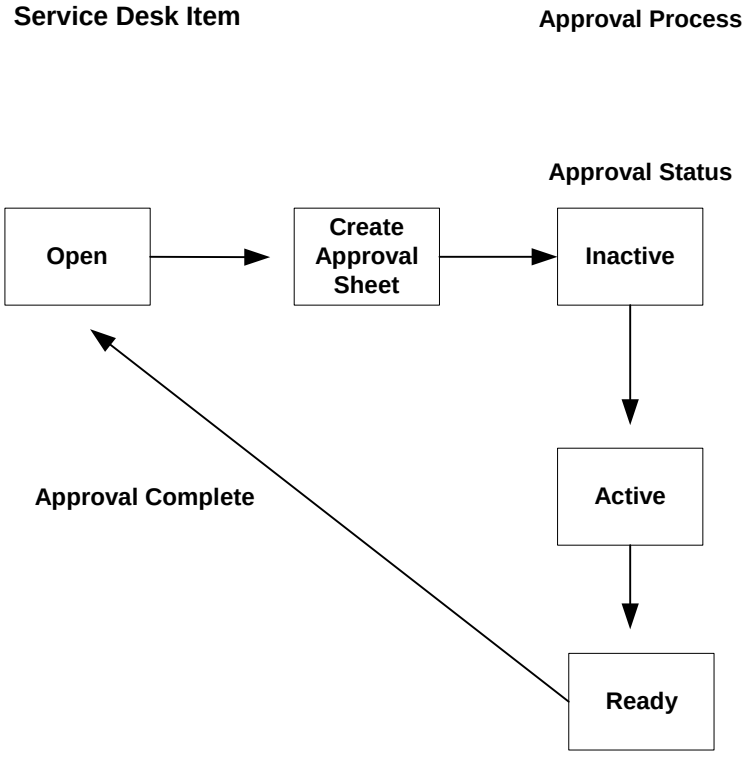
NOTE

Approvers can only be notified automatically by e-mail if this facility has been enabled within the Tools facility of Service Desk on the machine they are using.

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`.

Figure 3-3 Approval Process



Approval Sheets

Approval sheets can be added to any workflow class item within Service Desk:

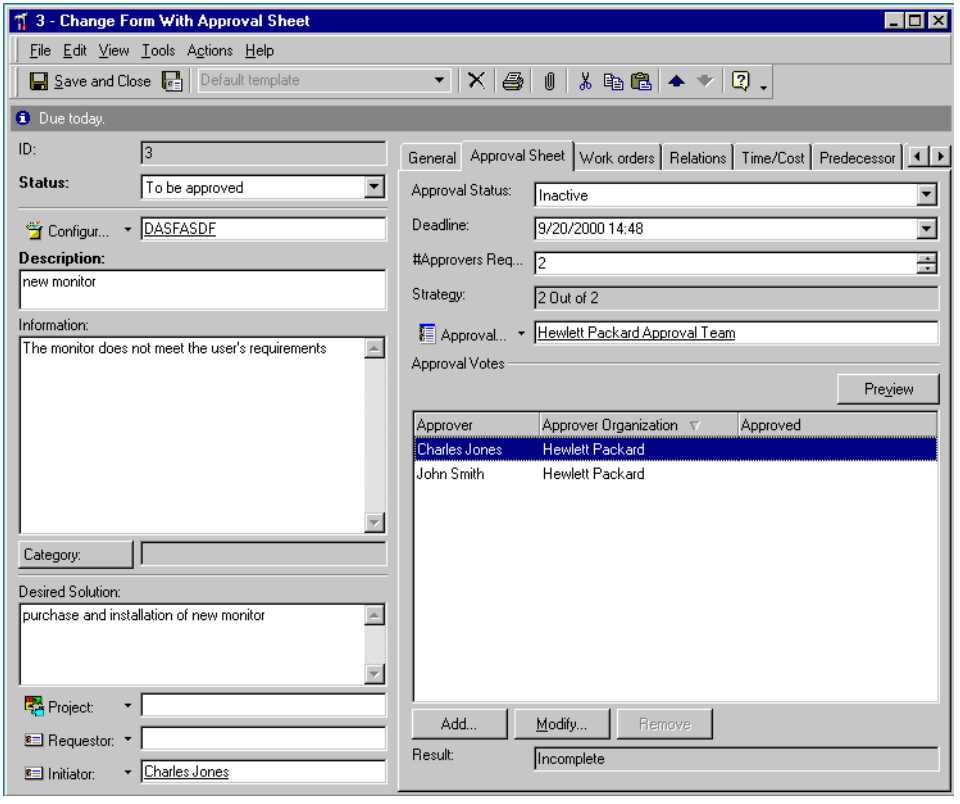
- Change
- Project
- Problem
- Incident
- Service call
- Work order

When opening a form, a tab for the approval sheet is enabled. The

initiator of the approval process as well as the designated approvers are able to view the approval sheet.

The approval sheet serves two purposes: as a ballot for the designated approvers as well as a means to start the approval process.

Figure 3-4 Approval Sheet



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 random 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.

Introducing Service Pages

Service Pages are an extension to Service Desk. Not only do users have the ability to contact the help desk via a Web browser, but the data that is visible in Service Pages is actually the current data.

Service Pages provide support for two types of user: support engineers who already have access to Service Desk, and end users.

End 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:

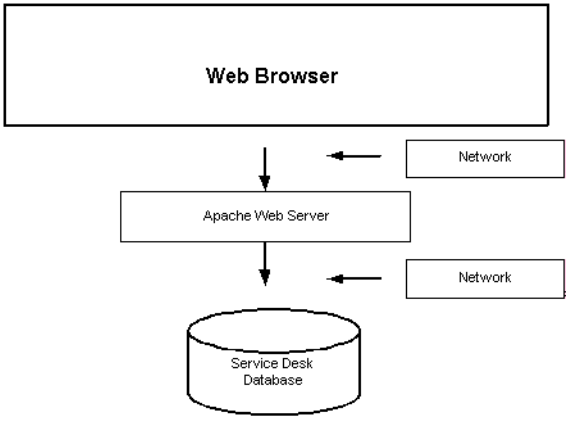
- Create service calls
- Create incidents
- Overview service calls
- Overview incidents
- Overview problems
- Overview changes
- Overview work orders

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 an Apache Web server. The Apache 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 3-5 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 Service Desk users.

Viewing Information

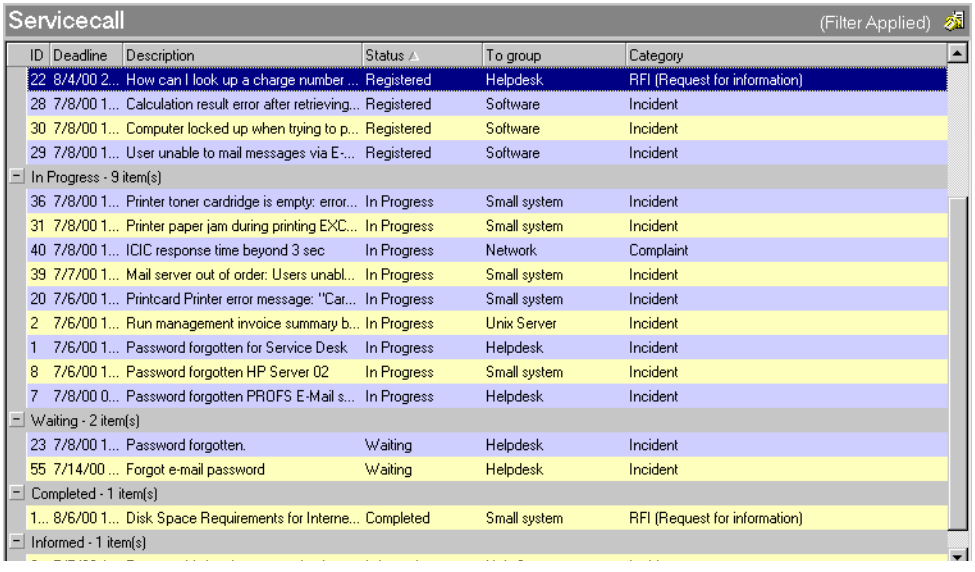
Service Desk offers you considerable control over the way you view information. You can choose the content of information that will be displayed, for example all open service calls, and you can specify the format that you would like the information displayed. The basic formats for displaying information 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. Table views display information you need to do your everyday work as in Figure 4-1.

Figure 4-1 Service Calls: Table View



Using Chart Views

Charts are powerful overviews of items. A chart groups items and displays the absolute or relative size of the groups in a variety of ways. The chart view allows you to use numerous different styles of charts in which to present your information. Some of the charts will also allow you to view them in 3D. With the chart view, you have easy-to-read, on-screen reports that are printable.

The charts also provide easy access to items in the groups. This is done by clicking on a portion of the chart, this will display a table containing the items related to that portion, these items can then be selected to view more detailed information.

Chart views can also be customized. Customization will allow, amongst other things, 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 that the chart is to be viewed from to be changed.

A chart groups items and shows the size of each group. The size of the group can mean different things, such as:

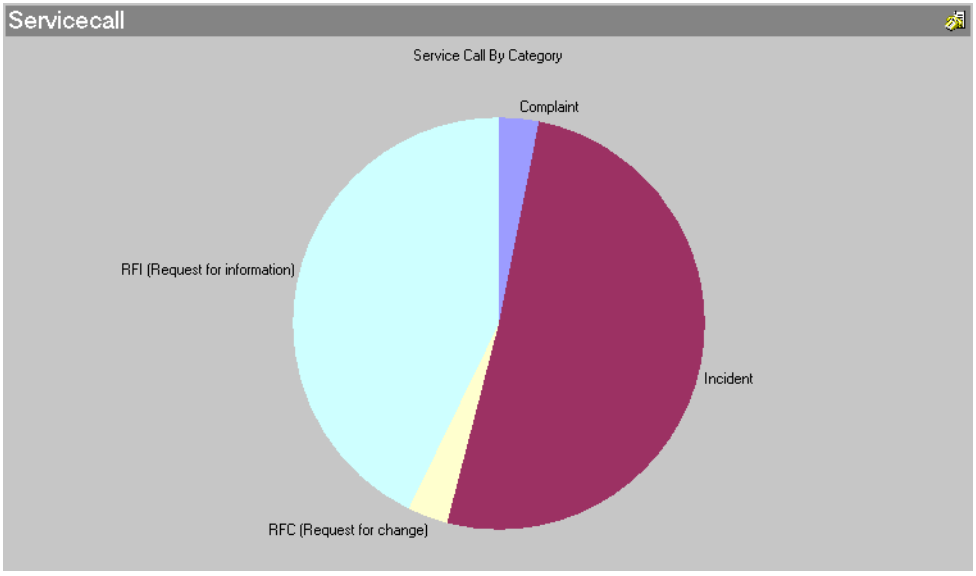
- the number of items in the group,
- the total of a summation of field values,
- the average value of a field in the group
- the minimum of the maximum value of a field in the group.

Different types of charts show the groups differently. Pie charts display the groups in relative sizes as in Figure 4-2. The entire pie represents all items while group sizes are shown as percentages of the total pie. Bar charts, however, display items in absolute sizes.

With Service Desk, you can also use the chart in another application, such as MS Word or Powerpoint. To use the chart:

1. Choose `Copy` from the `Edit` menu.
2. Switch to the application where you wish to use the chart
3. Choose `Paste` from the other application's `Edit` menu.

Figure 4-2 Service Calls: Chart View



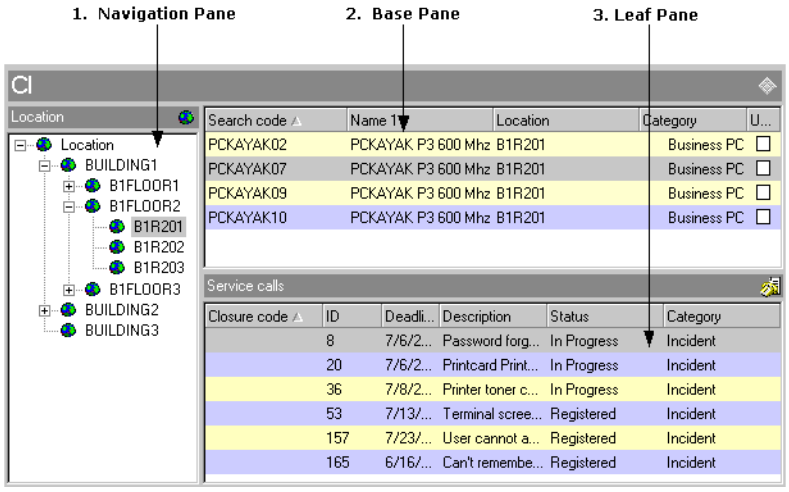
Using Explorer Views

An explorer view contains a navigation pane, a base pane and one or more leaf panes as in Figure 4-3. The base pane will display the information you are looking.

To find an item in an explorer view:

1. Navigate in the navigation pane and click an item.
2. Select an item in the base pane.
3. The leaf pane will display the information.

Figure 4-3 **Explorer View Panes**

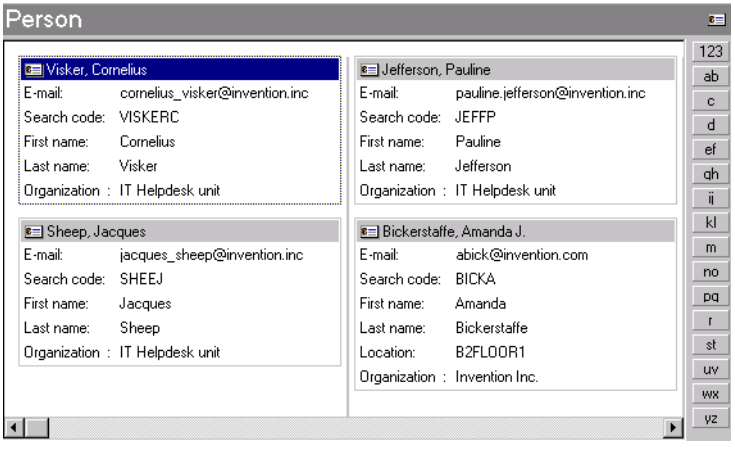


Using Card Views

Card views display information as cards. 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, for example, information about employees.

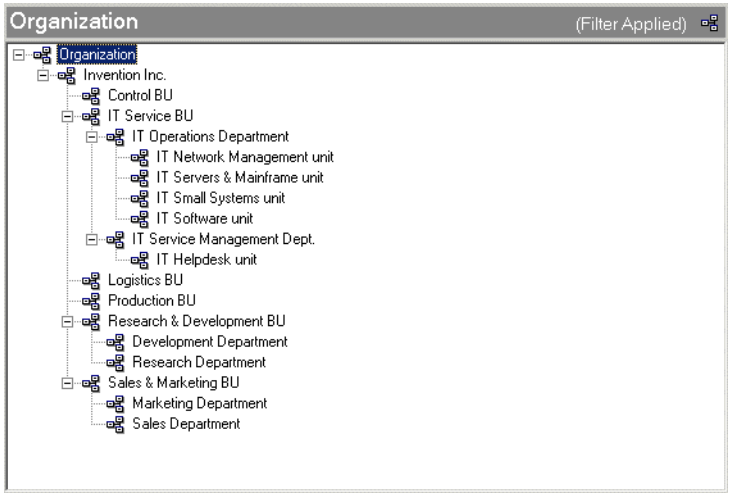
Figure 4-4 **Card View: Personnel**



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.

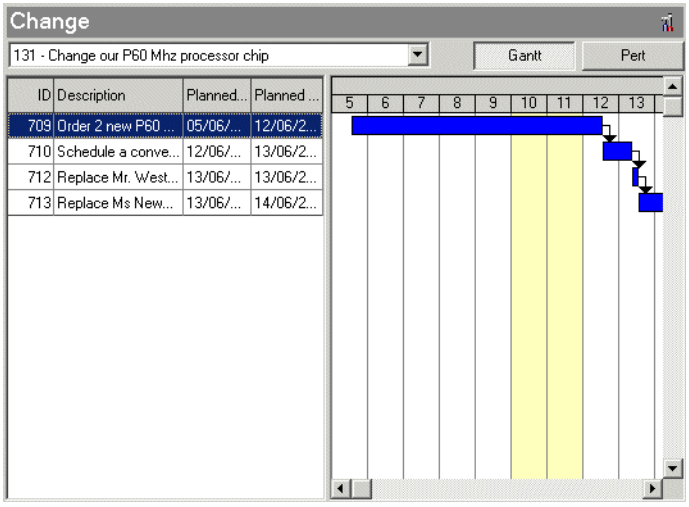
Figure 4-5 **Tree View: Organization Structure**



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 tree view lists the activities, and displays the planned progress graphically, either in a Gantt chart or a Pert chart.

Figure 4-6 **Project View: Work Orders in a Change Item**



Using the Actions Menu

The `Actions` menu provides shortcuts to tasks related to Service Desk items. Figure 4-7 shows an example `Actions` menu for change items. The `Actions` menu contains three types of actions:

- Smart link actions

  Smart link actions start external programs. The external program may be called with passing information from the item you had selected or opened when clicking the smart link action command. For example, MS Word may be opened to create a text file using the ID of the service call as the name for the MS Word file.

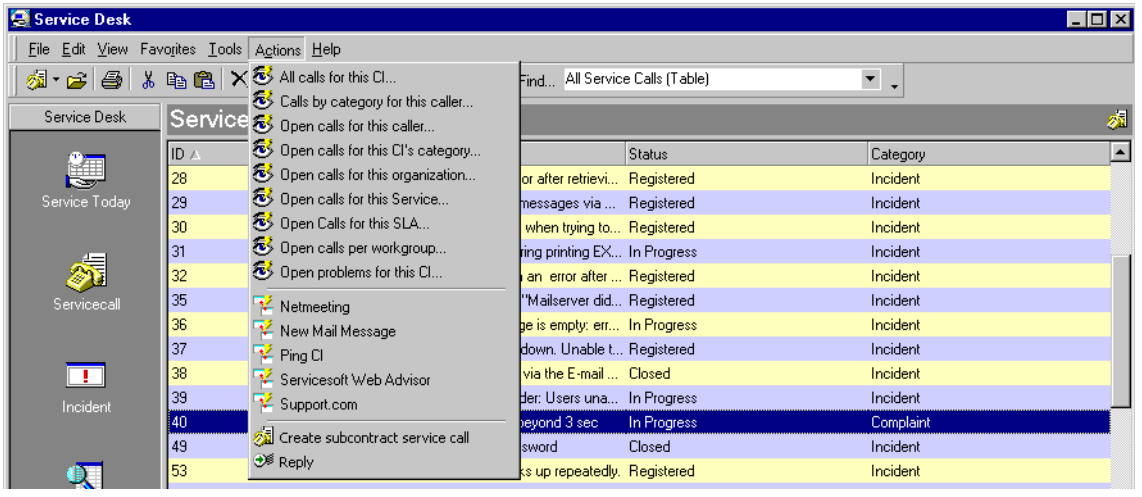
- Overview actions

  Overview actions open table views of other items. The information in the opened table view can be filtered to display information related to the item you had selected or opened when clicking the overview action command.

- System actions

  System actions are tasks that would be too complex to perform manually. Creating subcontract service calls is an example of a system action.

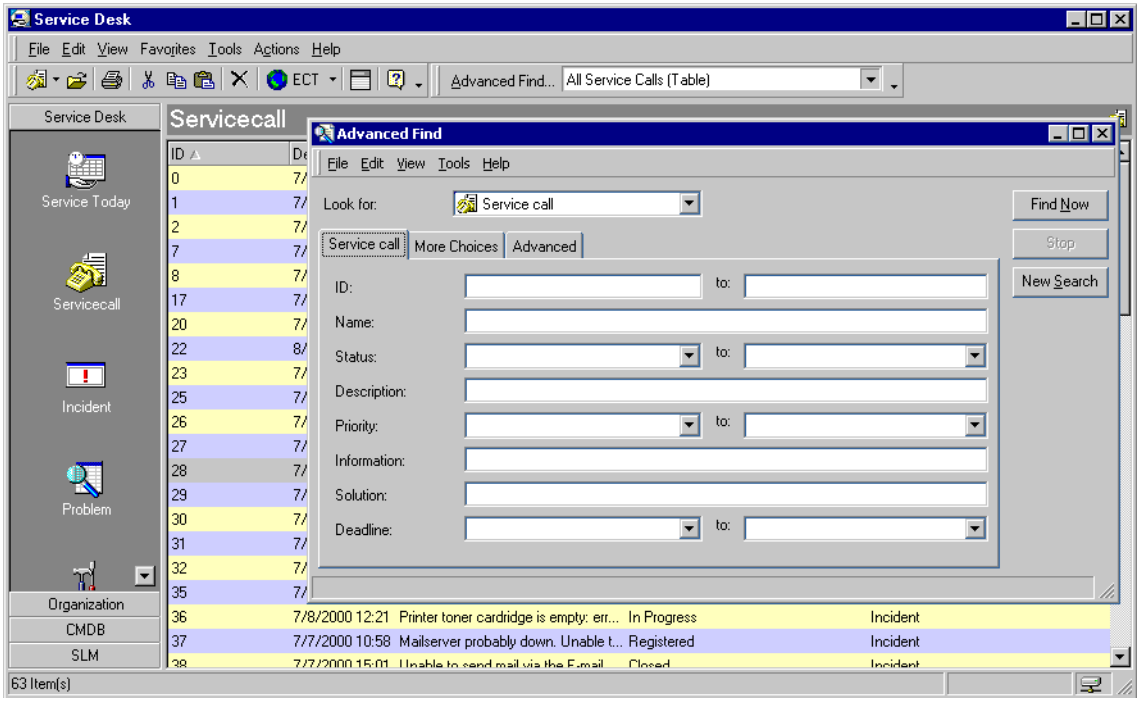
Figure 4-7 Service Call View: Actions Menu



Using Advanced Find

With Advanced Find you can specify complex search criteria to find items stored in Service Desk. Figure 4-8 shows the Advanced Find dialog box opened ready to enter search criteria for service calls.

Figure 4-8 Service Call View: Advanced Find



You can open the Advanced Find dialog box in several ways:

- Choose Advanced Find from the Tools menu.
- Click Advanced Find in the toolbar.
- In a form, choose Advanced Find from the menu of any lookup item button to find an item that can be referred to in the field of the lookup item button.
- From any text field in a form, choose Advanced Find from the Tools menu to find items containing similar phrases and key words.

- Click Advanced Find in the dialog box containing an Advanced Find button to find items that are in the list or can be added to the list you are working with.
- Press **F2**.

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 Self-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 however, Sarah chooses to use her HTML browser to access 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

Your ultimate goal is to receive prompt resolution of your IT infrastructure issues. You can quickly report issues in a variety of ways:

- e-mail
- HTML browser (Service Pages)
- phone
- fax

Registering Service Calls

The basic function of a help desk is to resolve the IT infrastructure needs of customers. In order to meet your help desk requirements, basic information must be communicated before help desk personnel can perform effectively.

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

- caller's name
- affected configuration item
- exact description of problem
- 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). The solutions to reported service calls can also be viewed when completed.

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 call 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 has a relation with two templates work orders for both the facilities and IT departments. The work order for facilities includes placing a desk as well as a computer. The work order for the IT department includes 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.

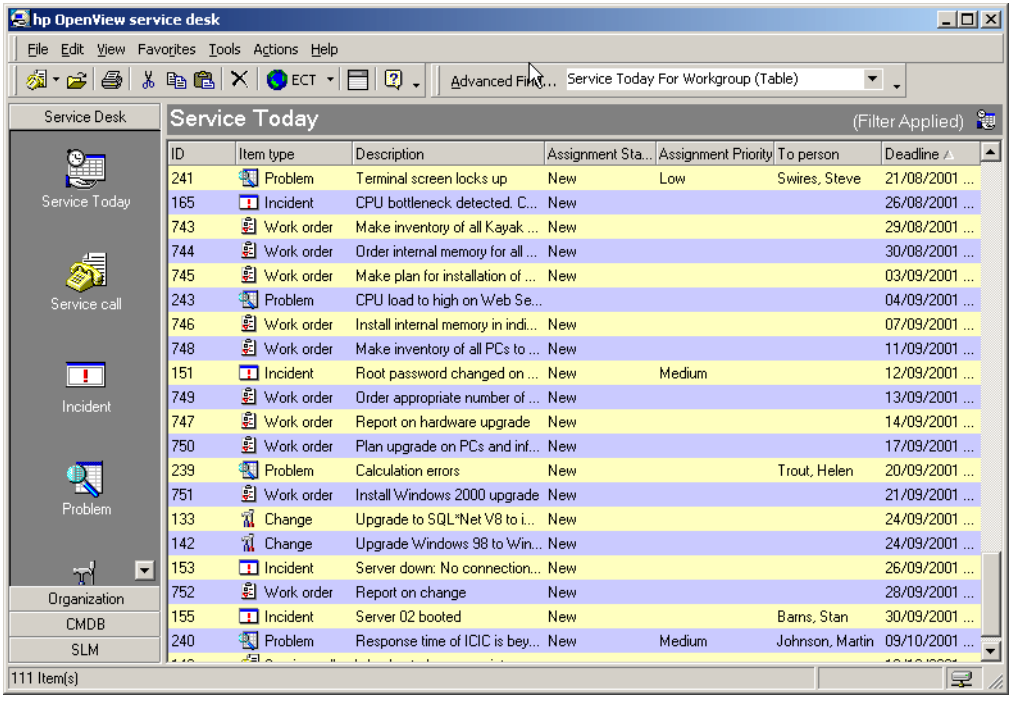
By using Service Desk, all processes required for Sam to begin his responsibilities are automated after the help desk operator has been contacted.

Overview of Help Desk Operator Tasks

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

As a help desk operator, you monitor the status of a CI using predefined views, troubleshoot problems using the appropriate filters and resolve service calls using 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 Contact Person Console View



Administering Service Calls

Service calls are registered requests from customers that can evolve into:

- a request to solve an incident;
- a request for a change, or;
- a request for information.

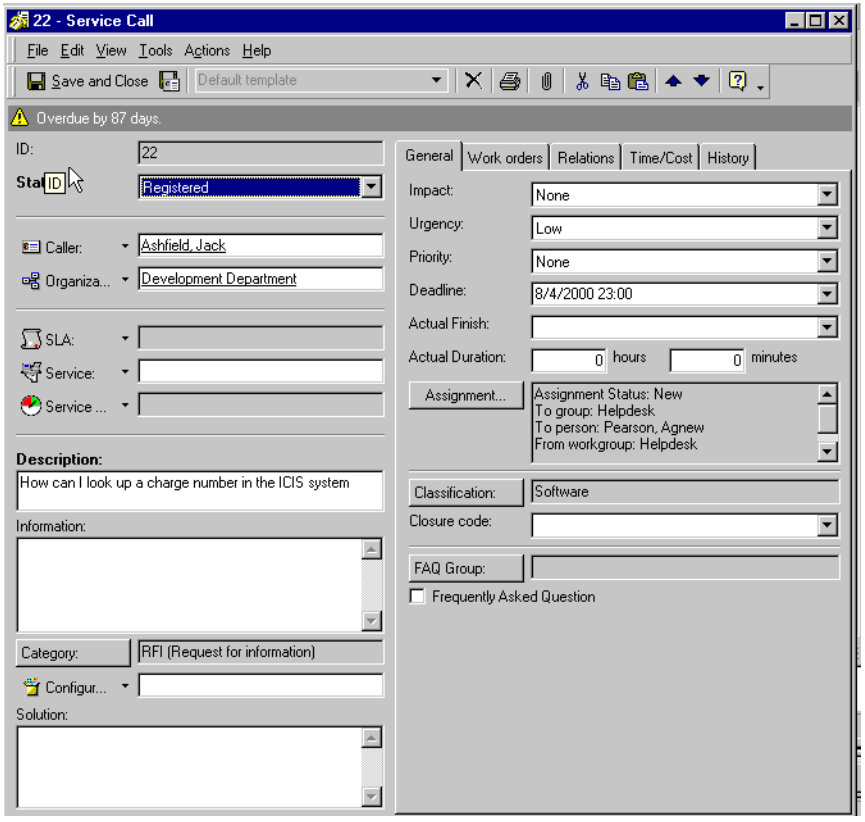
Registering Service Calls

When registering a service call, gathering essential information is crucial to resolution. The information you, as a help desk operator, 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 84) are a convenient way of gathering information from the caller.

The Service Call form is used for entering service calls. See the following Figure 6-2 as an example of a Service Call form. Your IT infrastructure management may decide to use this template or create a similar template with dedicated requirements for your organization. A general description of each required field follows.

NOTE You can also register, monitor and update service calls by using your HTML browser. By using your HTML browser, you can also work offline.

Figure 6-2 **New Service Call**



The mandatory fields are:

- 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

You can also identify mandatory fields requiring data by:

1. Selecting `Options` from the `Tools` menu.
2. Select the `Required Fields Font` check box.
3. Click `Font` and select the required font properties.

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 copied into the service call so that specialists can view the information.

Viewing Service Calls

Service calls can be accessed and viewed for additional information from 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`.

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, or
- recording your attempts to resolve the 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 on subcontract service calls, 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. For example, if 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 manners:

- 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. Figure 6-3 displays an example service call record 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. Figure 6-4 displays an example service call closure.

Figure 6-3 Service Call Deletion

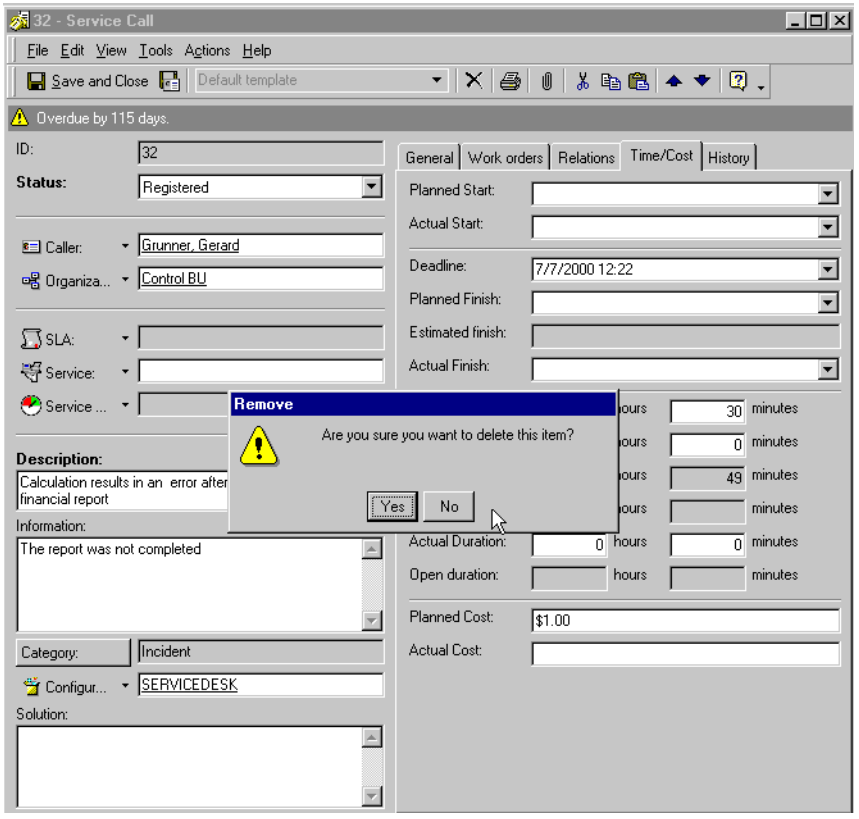
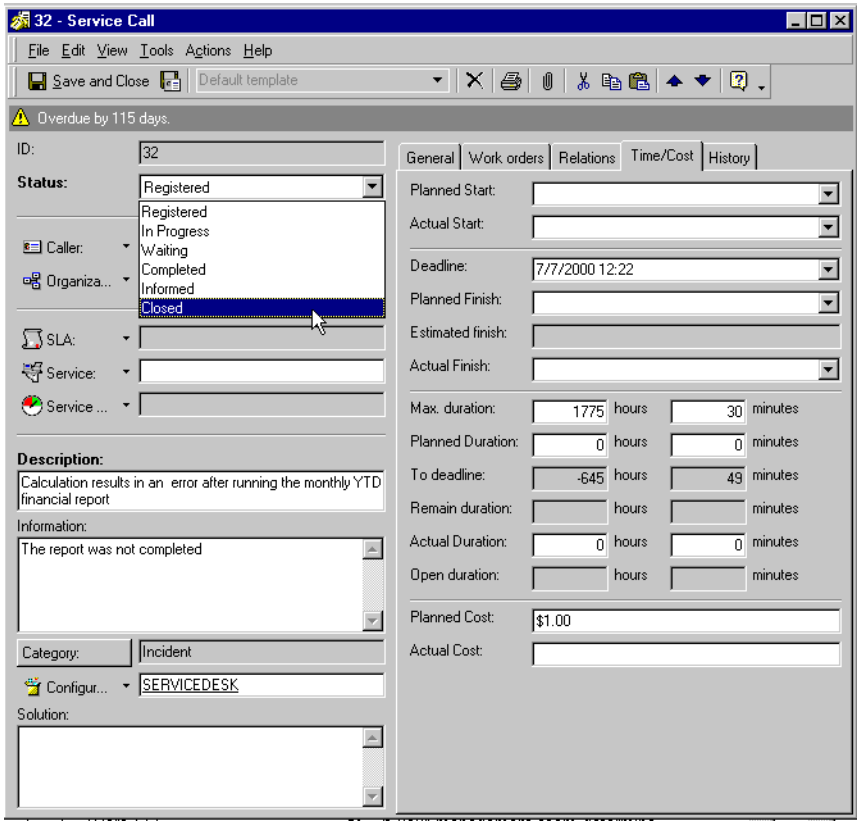


Figure 6-4 Service Call Closure



Identifying Related Service Desk Roles

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

- 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.

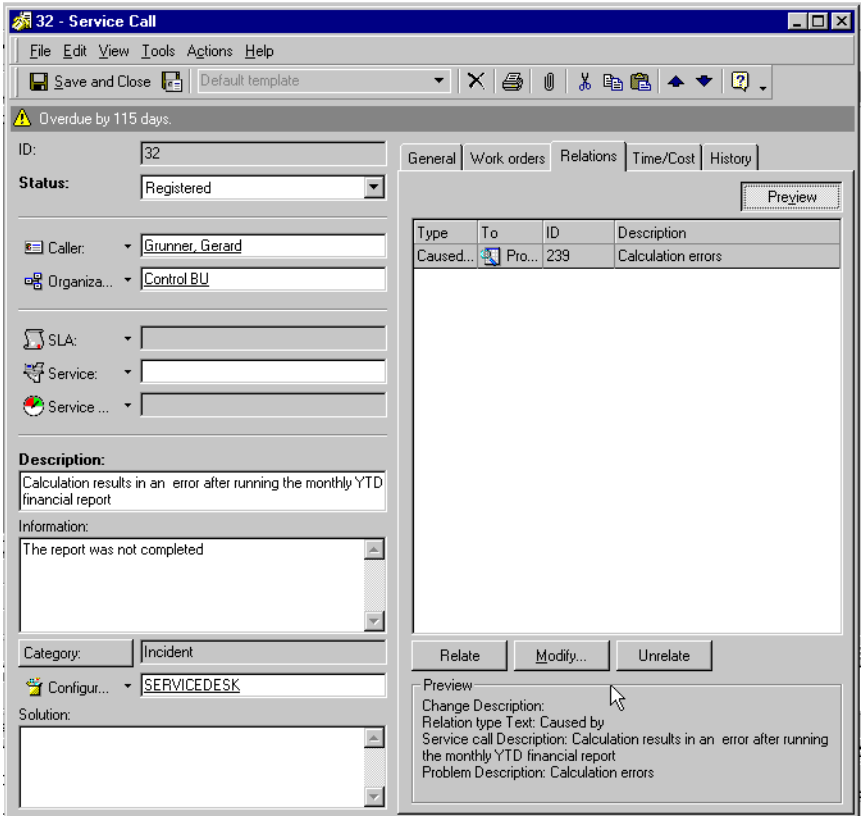
Your tasks as the primary contact person are critical to receive maximum benefit to Service Desk implementation. Without your accurate identification of service call issues and consistent entry of call registration data, the appropriate specialists cannot properly assist end-users in resolving IT infrastructure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

Relating Service Desk Processes

By indicating that service calls are related to problems and changes, your specialists can proactively 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 6-5 **Service Call Relation**



7 Configuration Manager Tasks

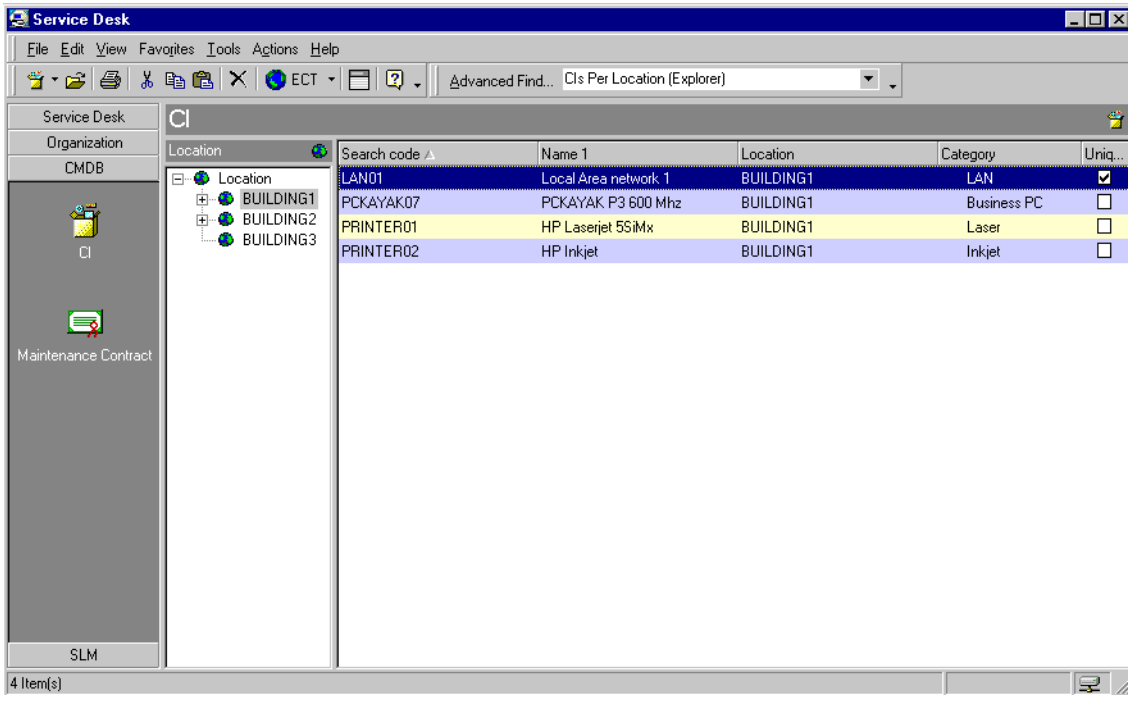
This chapter describes the general approach a configuration manager may take when implementing Service Desk. The process of managing Configuration Items is also provided.

Administering Configuration Items

Configuration management is a key element of Service Desk. Management of all configuration items includes 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 mousepads 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

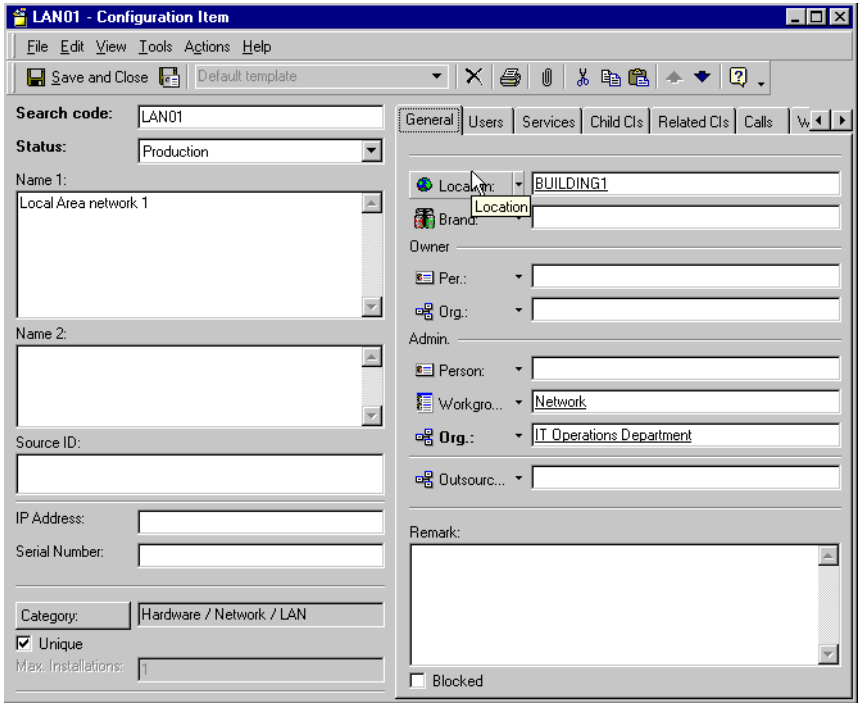
You can register configuration items in the following ways:

- 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 shows a typical New Configuration Item form. A general description of each required field follows.

Figure 7-2 **New Configuration Item**



When creating CIs, you will notice three mandatory fields. The mandatory fields are marked by bold typeface on the new CI console. The

mandatory fields are:

- `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 statuses 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.

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.

Viewing Configuration Items

If you have created a search code naming system which has been consistently used by other Service Desk users, viewing CIs should be completed easily.

Configuration Items can be accessed and viewed for additional information from within the Service Desk Console. By using the toolbar, you can view information by:

- Choosing commands on the `Action` menu
- Choosing `Advanced Find`

For additional information on using the `Action` menu or `Advanced Find`, please refer to *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

Deleting Configuration Items

Deleting Configuration Items is relatively simple however, 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 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 identification creates a hierarchy between CIs.

NOTE A parent-child hierarchy should mirror how configuration items are connected in practice to one another.

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.

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 use the CIs to register service calls. Help desk operators use the ID codes for each CI in registering and resolving service calls.

- Specialists

  Specialists use the CIs to identify service calls requiring resolution.

- Change managers

  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

  CIs which 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 actual 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:

- 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;
- modifying 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 will be displayed. You can click the box at the top of the display to sort the open service calls in either ascending or descending order.

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

NOTE You can also register, monitor and respond to service calls by using your HTML browser. By using your HTML browser, you can also work offline.

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, there remains basic information which must record the work you're accomplishing.

Describing your work serves three purposes:

- solutions are supplied directly to the customer;
- solutions may be re-used;
- solutions may be used for preventative action.

The fields which must be completed on a service call you resolve may have varying mandatory fields as determined by your IT infrastructure management in cooperation with the Service Desk system administrator. A general description of each required field follows:

- `ID`

  The service call ID number

- `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`.

- `Caller`

  The individual who reported the service call. The caller can be a customer or another IT infrastructure colleague.

- `Description`

  This field provides an overview of the IT infrastructure issue.

- `SLA`

  This field indicates the service level agreement applicable to the CI.

- `Service`

  This field indicates the level of service you agreed to provide to the customer.

- `Category`

  This field indicates the type of service call.

- `CI`

  This field indicates the unique CI code related to the service call.

- `Solution`

  You will provide the solution to the service call in this field.

- ID

  The service call ID number.

- Tab pages

  Five tab pages appear as default. The tab pages provide information on exact details relevant to the service call. Additional tab pages may be defined by the Service Desk system administrator. The default tab pages are: general, work orders, relations, time/cost and history.

NOTE

You can identify mandatory fields requiring data by:

1. Selecting Modify Tools from the File menu.
2. Select Options.
3. Select Required Fields Font.

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 process, please refer to the *Service Desk Online Help*.

In general, when responding to a Service Desk process, 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 on Self-Service Pages of their HTML browsers, customers can solve common problems themselves and you can focus your specializations on unresolved incidents.

Closing Service Calls

When you have resolved a service call or discovered a workaround, you need to close the service call. 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 completely. 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 indicating that performance indicators for a database instance exceed the warning threshold. The help desk may already have linked several customer calls to this incident.

The database management workgroup finds that the database settings are fine, but also that a UNIX administrator has changed system parameters of the UNIX server on which the instance is running. They implement a temporary solution for the customers by changing database parameters. The help desk can close the customer calls and set the database incident to 'handled', but the incident is not closed at this stage.

The database management workgroup creates a subcontract service call to the workgroup responsible for managing the server. The subcontract service call requests that the UNIX system parameter changes be undone.

When the database workgroup is notified that the system parameter changes have been undone they reset their own 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.

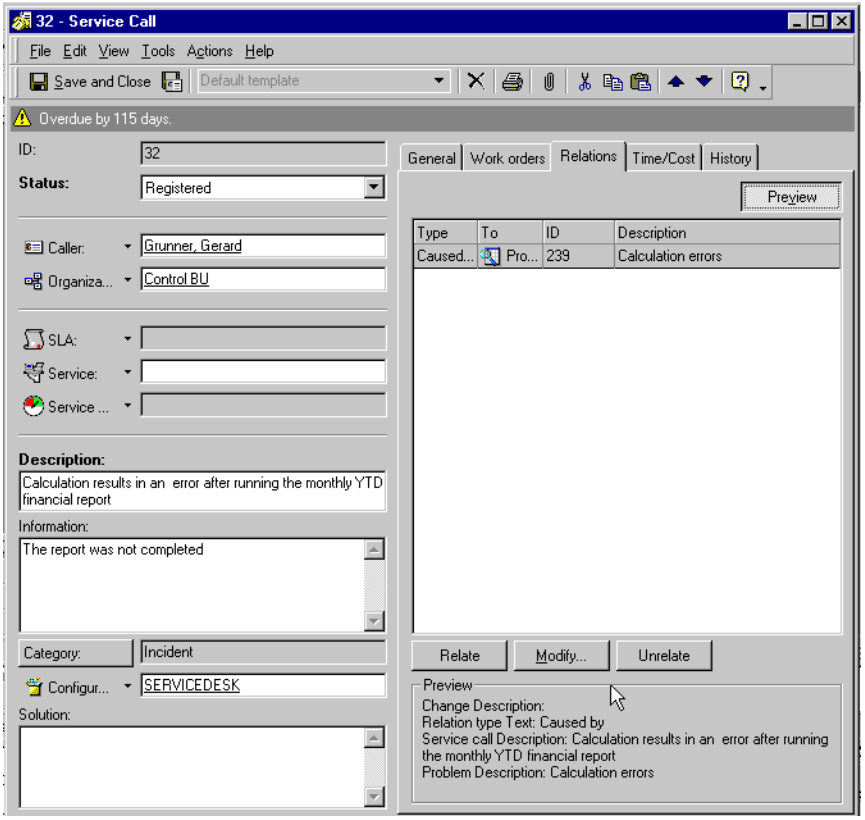
From the incident, a subcontract service call is created to the provider of the backbone access service requesting restoration of capacity on the Internet connection service.

Relating Service Desk Processes

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

If the related Service Desk process 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, changes, projects or problems, you can greatly reduce your time expenditure. The following screen in Figure 8-1 depicts a service call relation:

Figure 8-1 **Service Call Relation Tab**



Identifying Related Service Desk Roles

Your tasks as specialist are critical to providing quality service and maximum benefit to Service Desk implementation. Your role as specialist interacts with two Service Desk roles frequently.

- Change manager

  The change manager may create change request that you will implement. By creating change request, there will be work orders associated with the request requiring your action.

  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 must incorporate your resources and response time into creating realistic SLA. Your response time on all Service Desk processes will support the service level manager's negotiated agreements with end-users.

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9 Change Manager Tasks

Change management is used to describe the management of scheduled changes in your IT infrastructure. This includes scheduling changes, providing detailed information about scheduled changes, and deleting changes.

This chapter will describe the role of the change manager within Service Desk involving:

- Calculating the window of opportunity
- Outage planning
- Automatically updating the CMDB in accordance with work orders
- Specifying change manager
- Checking the configuration item within another work order

Scenario: A Customer Profile

Steve, a senior help desk administrator, is using Service Desk to centrally manage the help desk. Before implementing Service Desk, it was difficult to know who was making changes to the help desk and when. Since Steve's company has used Service Desk, he has used the change management facility to give him an overview of all the configuration changes made within his help desk.

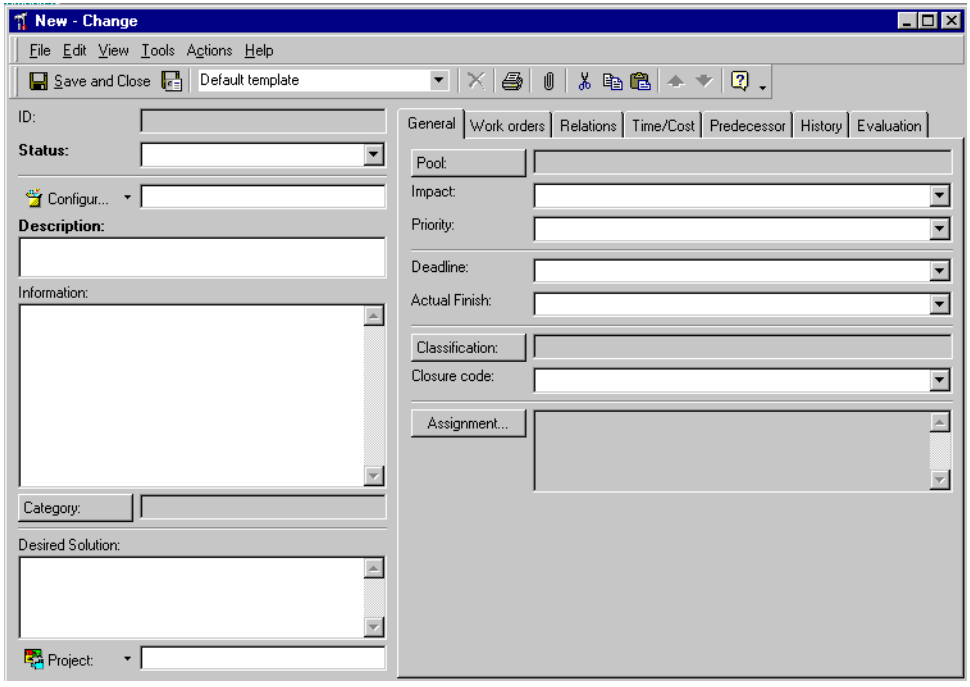
The customer service department has fifteen new employees starting at the beginning of next month. The human resources manager, Jeff, will be on holiday then. He wants to create their e-mail accounts and have their PCs ready when the new workers begin next month.

Jeff has created a template for new employees which includes work orders for e-mail accounts, PCs, and training. The work orders are forwarded to the specialist work groups for immediate processing.

Administering Changes

You can identify changes in Service Desk from the main console. When you wish to add a change, a template such as the default change template may be used. You can use the default template for immediate change management capabilities or create templates with fields required for your organization's IT infrastructure. Regardless of which template you choose, you must complete two required fields: `status` and `description`. Figure 9-1 depicts a default change template:

Figure 9-1 New Change Template



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 provide 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.

Viewing Changes

The change manager can display an overview of all scheduled changes in Service Desk. By using the toolbar, you can view information by:

- choosing the `Action` menu item;
- choosing `Advanced Find`.

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

Updating Changes

When a CI is prepared and is ready for implementation, the change manager can still:

- change the description;
- reschedule or delete scheduled changes before they are implemented;
- get information about who, when, and why objects were changed.

While viewing CIs, you can update the appropriate CI to reflect actions taken by you or specialists. For further details on updating CIs, please refer to the *Service Desk Online Help*.

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

  If your management team decides that the status must be changed to `Closed`, selecting `Cancelled` from the `Closure Code` field would be one possibility, but it would be advisable to ask your Service Desk system administrator to create a closure code titled `Duplicate` to identify such calls. 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

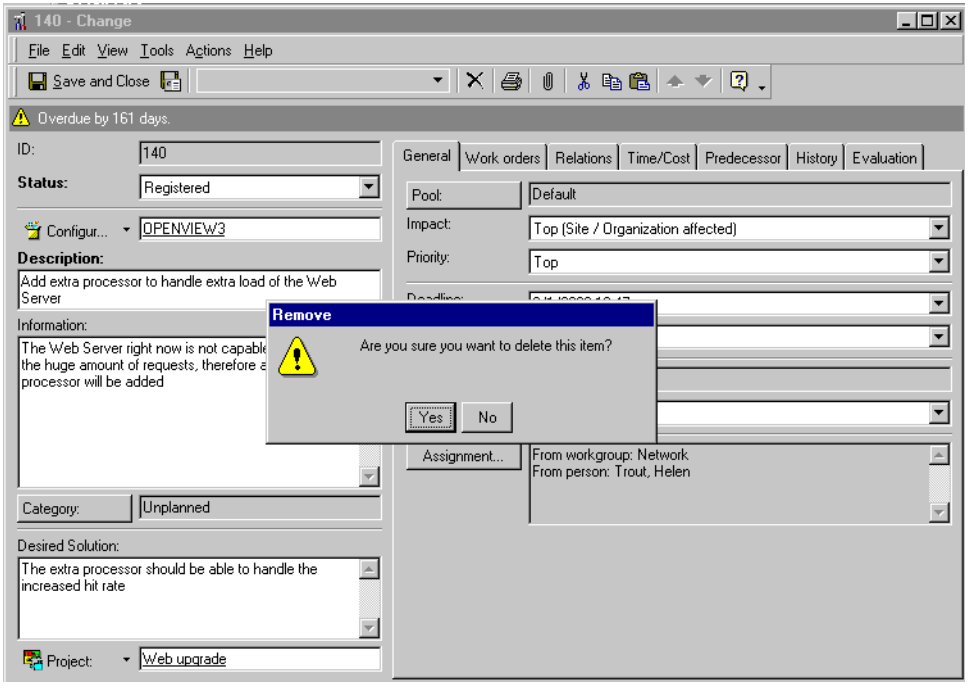
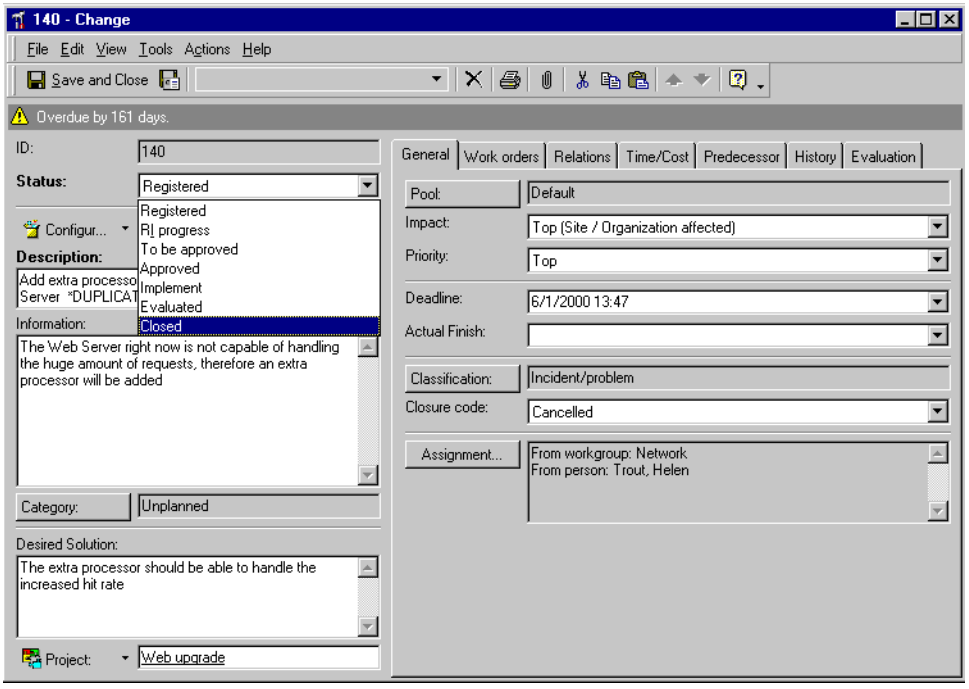


Figure 9-3 Change Request: Duplicate Closure



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.

Outage Planning

It is possible to specify planned outages for activities which require a shut down of a node for a period of time which results in outage of a particular CI or service.

There are two main categories of outages; occasional (incidental) and periodic (recurring). These can be specified as follows, for example:

- An occasional outage for a set of CIs belongs to a work order.
- A periodic outage for a CI has a recurring nature and belongs to a CI.

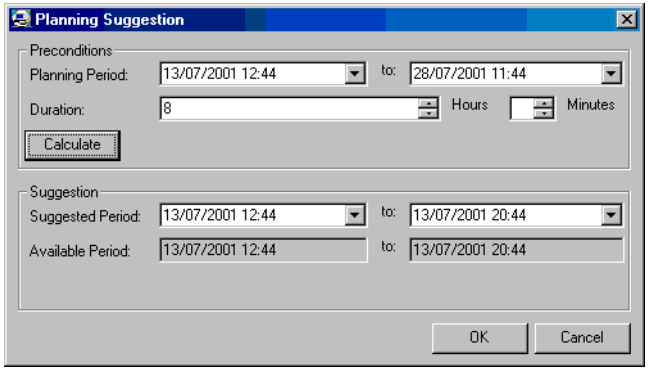
If you have to plan an outage that affects one or more CIs you can use the 'window of opportunity' calculation feature that will calculate and suggest a time period when the impact on Services will be minimal.

In Service Desk, the planned outages feature could be used when a service call is registered during a planned outage of a CI or an underlying CI.

NOTE Service Desk can be configured so that information can be sent to reconfigure Vantage Point in relation to new data being available within outage planning.

When a planning suggestion has been accepted for a particular work order it is possible to specify which of the CIs within the work order are affected by the outage.

Figure 9-4 Planning Suggestion



Calculating the Window of Opportunity

The procedure of calculating a window of opportunity allows the administrator to plan an outage in a way that is acceptable to their users.

This calculation is based on support hours. Once the calculation has been completed a time period when outage of the CI has the least impact on supported services will be displayed and is then shown to the user concerned, who is able to edit the proposed time period and add it as a time condition in the planned outage screen.

Updating the CMDB according to Work Orders

This supports the planning of changes to CIs. These changes are related to:

- Physical moves of CIs
- CI ownership
- CI administration responsibility

CI selection

The attribute changes can be specified for all, some or one of the CIs related in a work order.

In the configuration items (set) list of the work orders, one or more CIs can be selected (subset) related to the work order.

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

Attribute specification for simple attributes

When two work orders plan an update for the same CI the values can be specified separately and these attribute changes stored separately for each work order. This allows them to be changed for each CI individually.

This is done by applying planned changes of CI attribute values at the level of 'Relations to configuration items' as with the work order entity.

Attribute update specification takes place in the attribute update specification window. The attribute update specification window shows three columns; the first column lists the attribute names, the second column shows the current attribute value, and the third column shows the planned attribute value.

The planned attribute changes can be specified and viewed for one CI at a time.

NOTE The UI displays current and planned values and attribute changes.

The planned attribute changes within a work order can be specified and viewed for more than one CI when changes were already specified for one or more of the selected CIs, this is shown by presenting a warning: “!!!”

Current and planned values of a particular attribute for all CIs can be shown in a planned values window when saving changes.</comment>

```
<object id="hhctrl" type="application/x-oleobject"
classid="clsid:adb880a6-d8ff-11cf-9377-00aa003b7a11" code-
base="hhctrl.ocx#Version=4,74,8793,0" width="76" height="21">
  <param name="Command" value="ALink, MENU">
  <param name="Button" value="Text:Related topics">
  <param name="Flags" value=",,1">
  <param name="Item1" value="main.chm">
  <param name="Item2" value="a_approval">
</object>
</p>
<hr/>
<center>© <i>Copyright 1999 - 2001 Hewlett-Packard Com-
pany</i></center>
<p><center>© <i>Copyright 1999 - 2001 Hewlett-Packard Com-
pany</i></center>
<hr/>


</body>
```

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.

Check if the CI is in another WO

A list stating all the work orders that contain the CI is available by selecting it in the ‘Relations to configuration items’ page.

Identifying Related Service Desk Roles

Without an accurate identification of Service Calls requiring changes, the appropriate specialists cannot properly assist customers in resolving IT infrastructure issues. Your role ensures that agreed upon service levels are consistently met.

Your role 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 proactively and reactively 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.

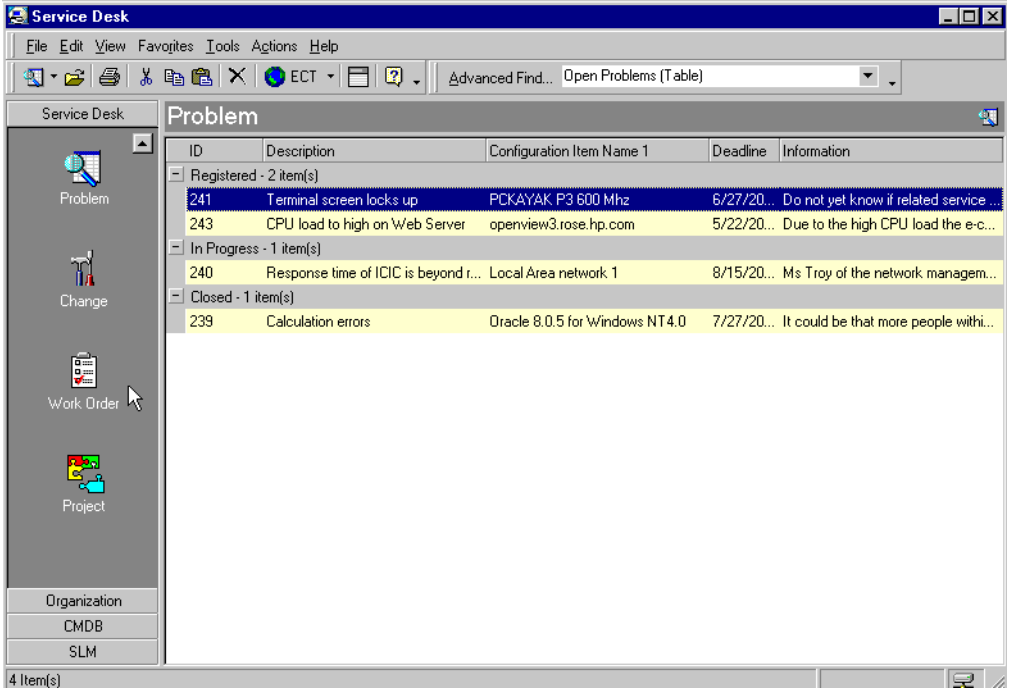
Administering Problem Manager Tasks

To operate in an efficient manner, a problem manager must handle problems effectively. A good problem manager will resolve problems in an IT infrastructure, supporting your organization's IT service quality goals.

Reducing the quantity of incidents is crucial in problem management. Many incidents can be resolved efficiently and effectively without requiring the intervention of a specialist. A problem manager should ensure the reduction in the number and severity of problems and known errors.

Problem managers will also need to interact closely with the change manager. The problem manager is the initiator of many change requests.

Figure 10-1 Problem Manager Console



Problem manager tasks is not simply a matter of responding to recurring

incidents. You can also identify issues requiring changes proactively. 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.

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 final solution can be investigated and implementing. 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.

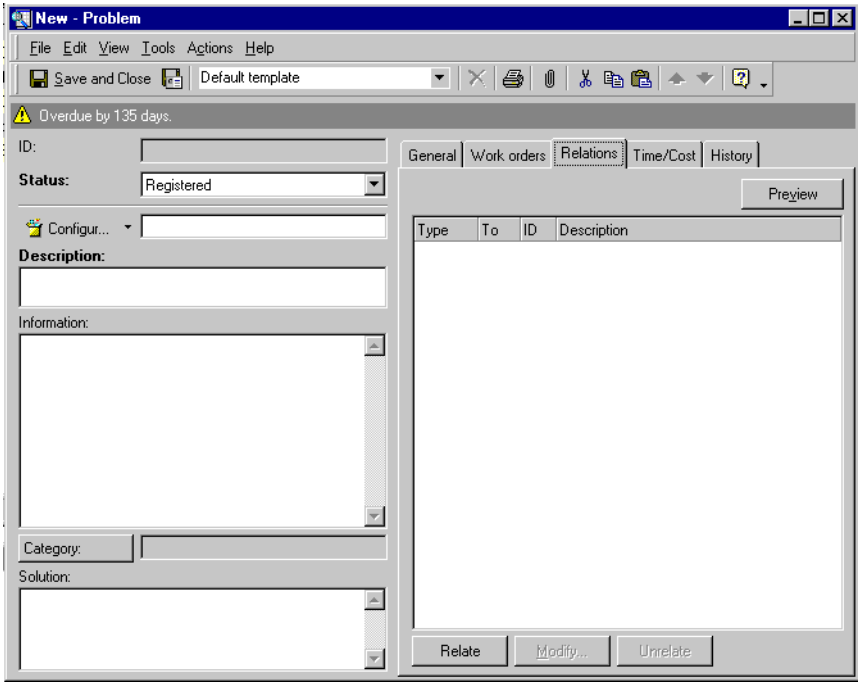
Viewing all reported service calls is vital to your role. You need to review the service calls to identify trends which can be mitigated through change manager intervention. For further information on viewing open service calls, refer to “Viewing Service Calls” on page 84 in Chapter 6 , “Help Desk Personnel 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 will be used by the change manager to identify appropriate modifications in the IT infrastructure.

When you register a new problem, a form similar to the one in Figure 10-2 is displayed. Your may decide to use this template or create a similar template with additional mandatory fields for your organization. A general description of each required field follows.

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



When registering a problem, you can identify mandatory fields by the bold typeface. The mandatory fields are:

- `Description`

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

- `Status`

  Clicking the arrow next to the Status field displays a list of statuses that can be applied to the new 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

You can identify mandatory fields requiring data by:

1. Selecting `Options` from the `Tools` menu.
2. Select the `Required Fields Font` check box.

3. Click Font and select the required font properties.

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

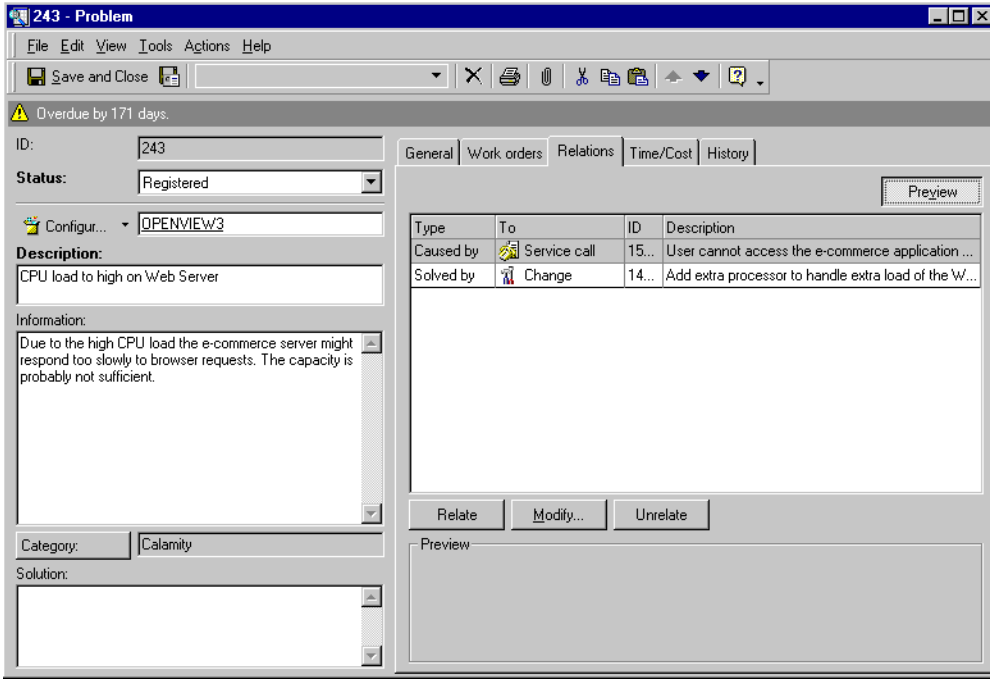
Relating Service Desk Processes

By indicating the service calls that are related to problems you identify, your change manager can proactively resolve IT infrastructure issues. The change manager can view the connection between related service calls as in Figure 10-3.

Relating Service Desk processes also records your investigation into known errors. All Service Desk roles can view the information and take appropriate action. For example, suppose you relate a problem call to several open and closed service calls. A specialist is currently working on an open service call and has discovered 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*.

Figure 10-3 Problem Request: Service Call Relations



Identifying Related Service Desk Roles

Without your accurate identification of recurring problems, the change manager cannot properly assist end-users in resolving IT infrastructure issues. Your role ensures that negotiated service levels are consistently met by providing high-quality proactive and reactive service.

Your role interacts with the following Service Desk roles:

- Configuration Manager

  Your tasks as problem manager are critical to configuration managers. Without your accurate identification of recurring service call issues, the change 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 specialists work in your problem investigations, you can identify know errors. The specialists, as the IT infrastructure personnel in the field also reports recurring issues. The specialist will need to interact closely with you to detail when work-arounds 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 in configuration items or in lower level service;
- 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

Many best practice models distinguish between different types of service. Doing so enables the identification of different types of relation 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 and for an agreed cost, and lower level services that are not necessarily offered to customers, and which 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 relation, 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
Business Service	Uses, Parent			Uses
Operations Management Service		Parent	Underpinned by	Manages
Underpinning Service		Underpins		Supports
Configuration Item	Used by	Managed by	Supported by	Uses, Parent

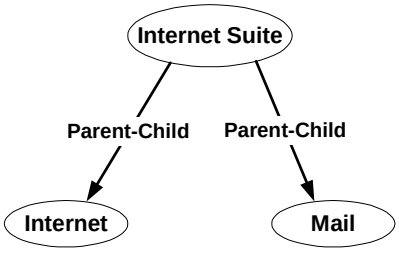
Scenario: Establishing a Service Structure

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: email 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

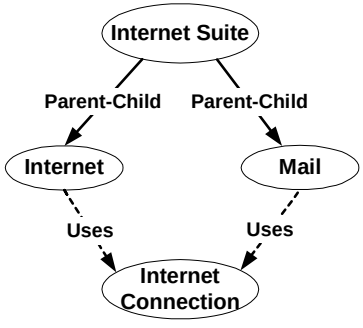
support seven days per week. Figure 11-1 on page 136 illustrates the composition of the business services.

Figure 11-1 Business Service Composition



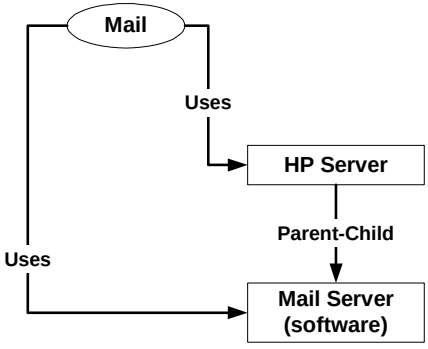
Each business service depends on an Internet connection service, and this relation is illustrated in Figure 11-2 on page 136. The Internet connection service is provided by an external company. Although this service is not supplied to Edwin's customers directly, its unavailability would have an impact on the Internet and mail services.

Figure 11-2 Service Usage Relations



Edwin now considers the configuration items used by the business services. In reality, email service provision would use a number of mail servers, with email software installed on each server. In this simplified scenario, we assume that the email service uses two configuration items: a mail server and email 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. Figure 11-4 on page 137 illustrates these relations.

Figure 11-4 Operations Management and Underpinning Service Relations

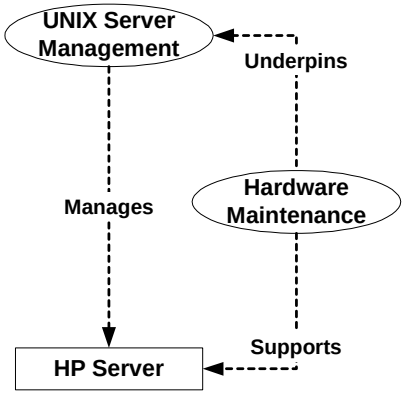
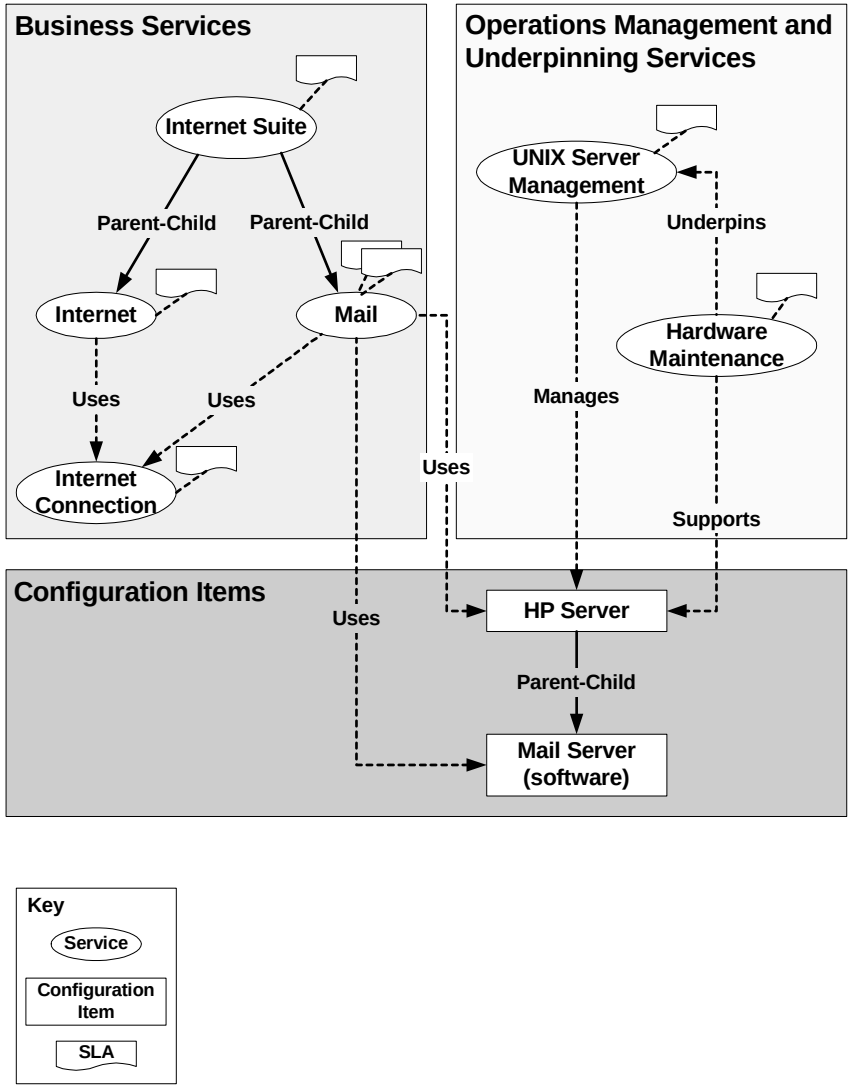


Figure 11-5 on page 138 illustrates all the above relations between business services, configuration items, operations management services, and underpinning services.

Figure 11-5 The Complete Service Structure

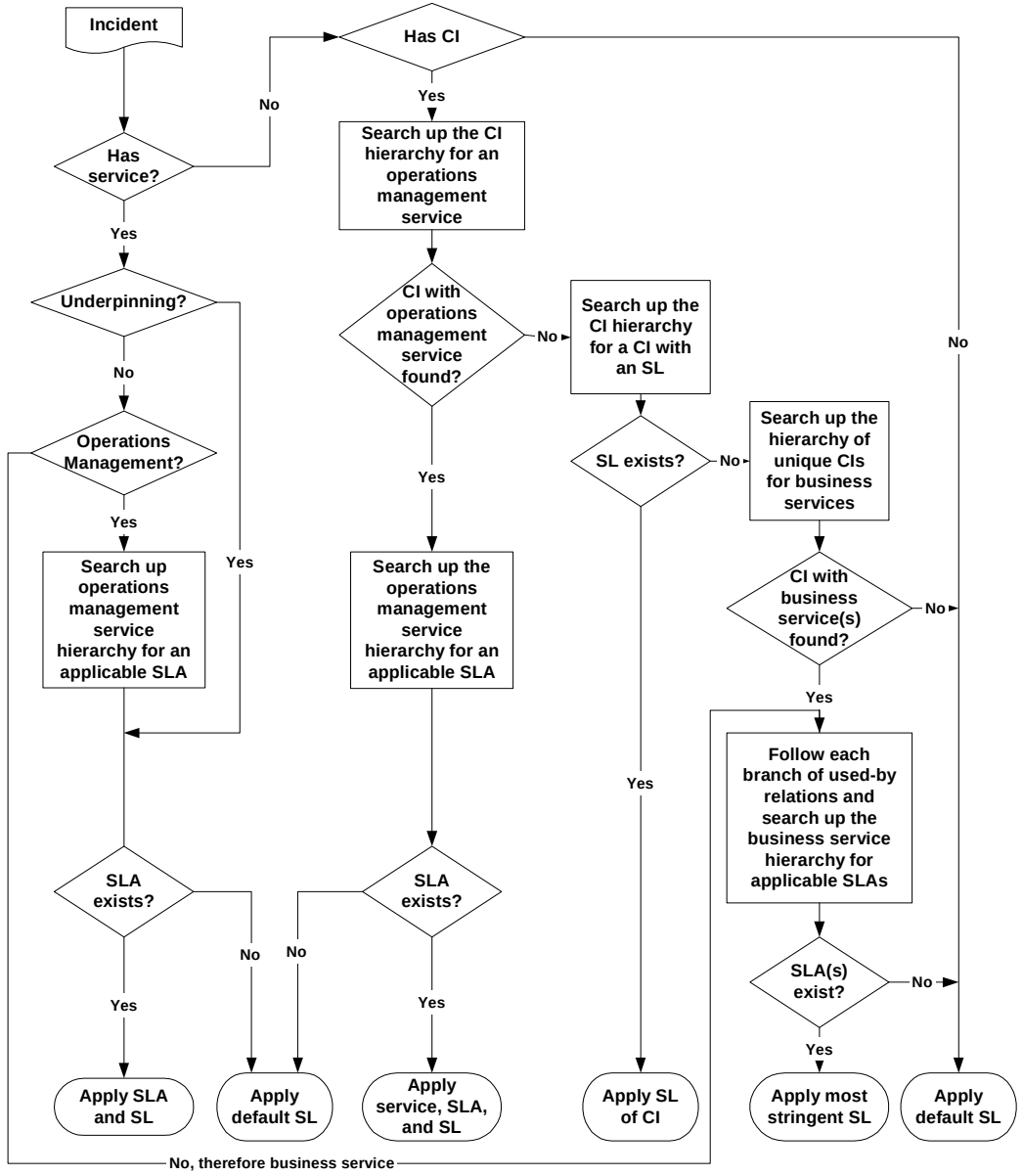


Automatic Retrieval of Service Levels into Incidents

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 140 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 141 and “Incidents Related to a Configuration Item” on page 141 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 shortlist of candidate SLAs, identifies the SLA with the most stringent service level, and retrieves that service level. If only one SLA is shortlisted, 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 shortlist 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.

Deciding Whether to Include 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

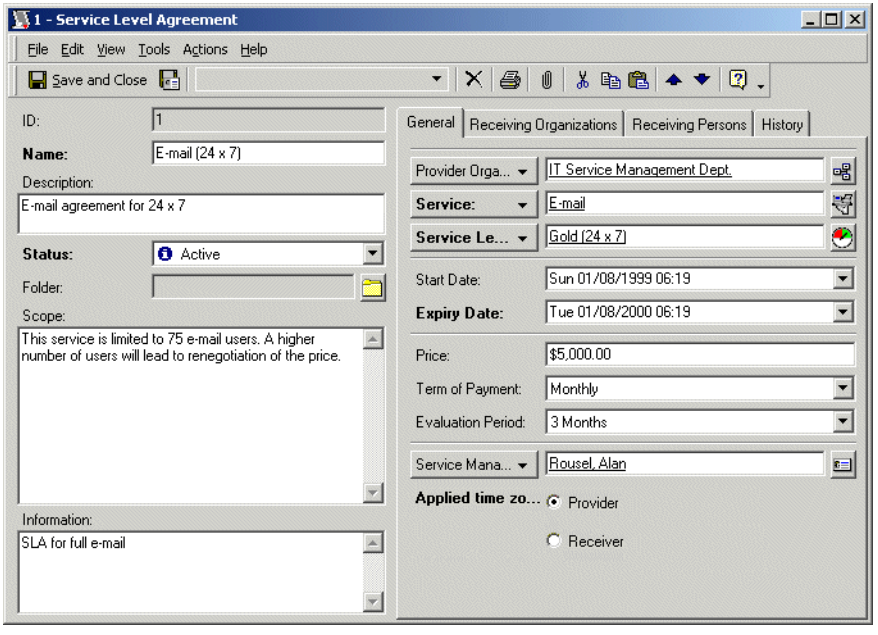
A service level agreement (SLA) specifies the contents of an agreement by which an IT service provider delivers a service to a customer. Although applying SLAs is a feature of Service Desk, you can also implement Service Desk without detailing service level management processes.

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.

Figure 11-7 shows how a simple SLA is used to define when e-mail service is available for a customer:

Figure 11-7 Service Level Agreement

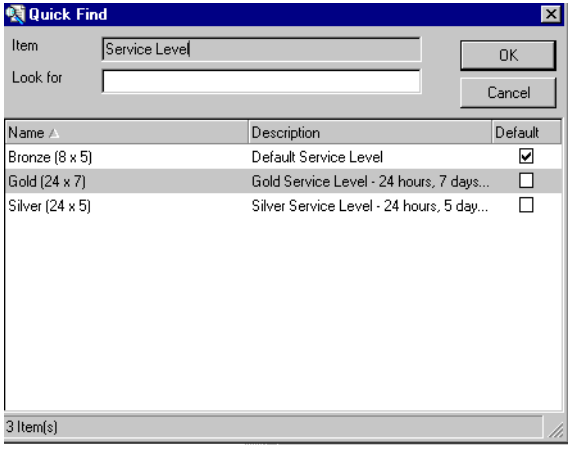


Defining Hours for Service Level Agreements

Your organization may offer different levels of service based on hours of service availability. For example, in Figure 11-8, 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.

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.

Figure 11-8 **Hours of Service**



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 casualty of poor service. IT staff unable to meet customer demands see their jobs as war rather than rewarding. Trained and experienced staff burn out and leave the company. Lack of service will result 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`

  The statement of intent will describe how the SLA will be used by your organization and your end-users.

- `description`

  A description of the CIs to be covered by the SLA.

- `user environment`

  A description should be given about who will use the CIs and how they will use it.

- `CI status notification`

  Try to describe how the status of the CI 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 end-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 CI service calls.

You must be committed to maintaining a review cycle. The focus of continual improvement to your SLAs is critical to receiving the full value of Service Desk. SLA reporting provides both your organization and your end-users quantifiable feedback on the success of your IT's service commitment level. The reports can also be used by the problem and change managers to identify trends towards future incidents and service calls that can be proactively eliminated. With these measurable facts, you can identify actions for improvement, allocated resources, and justify costs.

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

Testing Service Level Agreements and Policies

Help desk policies and service level agreements (SLAs) are similar in structure, the main difference is in how they are applied within Service Desk. It is possible to use the similarities between service level agreements and policies to save time when defining policies. Remember, SLAs are designed to get specific help desk policies into the real world. An SLA functions like a “filter” that authorizes service in specific instances. Policies impose “rules” that your service level needs to satisfy for both the customer and the IT service provider. Requests for service that do not satisfy these “rules” cannot be added. Requests for service which your help desk does not respond to within the specifications set in the SLA do not meet customer expectations.

It is not so easy to test help desk policies upon which the SLAs are based. It is not possible to test a policy without actually adding or modifying instances of the impacted CIs. You can, of course, “test” a policy in a simulated mode or a test database, but this would still require you to first define the policy, and then ensure that the required conditions exits.

However, due to the similarities between the policy and the corresponding SLA upon which it is based, you can often “test” a policy by first defining and running a corresponding SLA. If the SLA is then applied on a suitable CI and returns results that match the rules of the planned policy, you have the definition information for the policy.

Identifying Related Service Desk Roles

Your role as service level manager directly affects the work of other Service Desk roles.

- Configuration Manager

  Your agreements determine the level of service on the CIs managed by the configuration manager.

- Help Desk Personnel

  When creating service calls, Service Desk notifies the help desk operator of the level of service available for a particular CI. The first-line level of support that a help desk operator provides will need to be inline with your SLA.

- Change Managers

  The change manager will need to develop modifications to IT infrastructures within the boundaries of the SLAs you have developed.

- Problem Managers

  While monitoring service calls and Incidents, the problem manager will need to keep in mind the boundaries of the SLAs you have developed.

- System Administrator

  The SLAs you have created will need to be applied to the Service Desk system settings. The application of the SLAs will automate implementation of your agreed upon service level.

12 Persons and Organization Administrator Tasks

Before your help desk can assist IT infrastructure users, basic information must be entered on the people using the CIs and the people

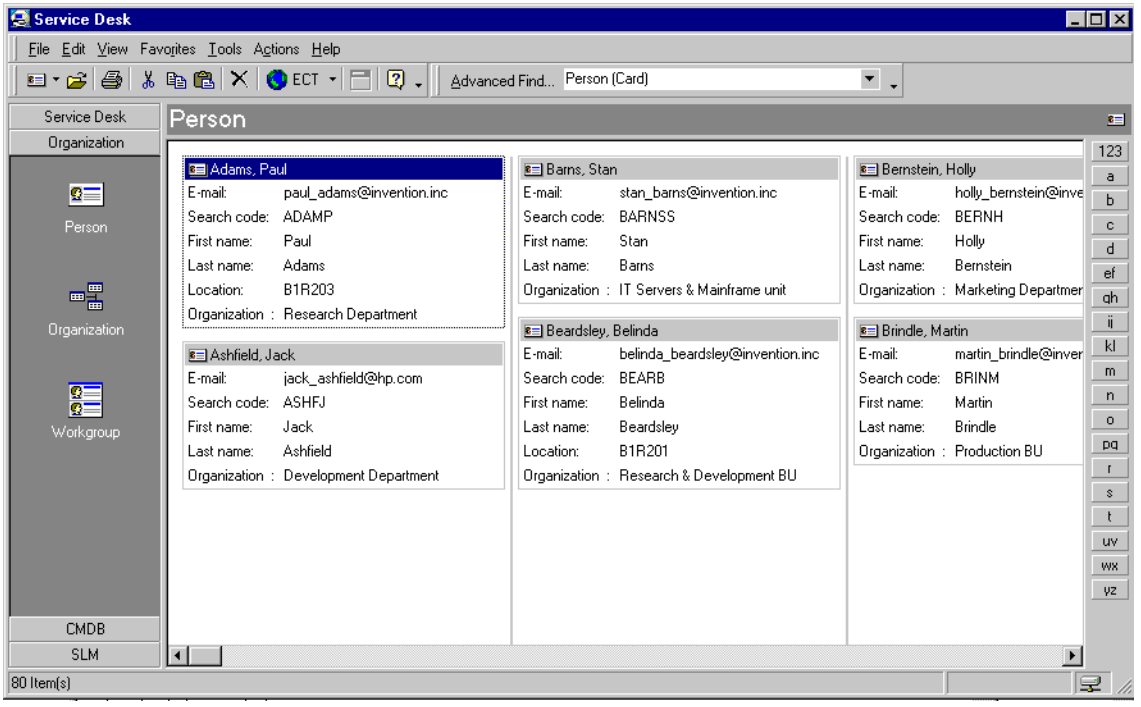
behind the IT support. The basic data on the people and organizations connects the CIs within the IT infrastructure. This chapter includes information on creating, modifying and viewing information on people and organizations.

Administering Persons and Organizations

The organization group on the Service Desk console is the persons and organization manager's workspace as displayed in Figure 12-1. The Organization group provides access to three types of organization entries:

- Person
- Organization
- Work group.

Figure 12-1 Organization Group View



In Service Desk, the concept of persons is used in two different ways. For internal employees, you can create person entries for your help desk personnel. For your customers, each person you create should be associated with a configuration item (CI). Your internal employees, may or may not be associated with a configuration item (CI).

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.

NOTE You should create organizations and departments before you create person entries.

Categorizing Persons and Organization Entries

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

You will also need to determine which Service Desk roles you authorize to create and update organizational data. Advise your system administrator which roles are authorized. The authorization should be dependent on the tasks and informational needs of each role.

Before implementation, you will also need to consider a consistent nomenclature system for organization search codes. A well chosen search code that is consistently used for all entries makes it easy to lookup organizations when Service Desk is used.

After you have considered your organization entries, you can proceed with defining required data for person entries. When creating relations between person entries and organization entries which are external, you should define a policy for private information, such as telephone and e-mail addresses, which is consistent with the legal statues 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 person entries. For example, you can identify contractors separately from employees and create a general contact category for your customers.

Registering Persons and Organizations

Creating employees in addition to customers for CIs 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.

NOTE 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, Figure 12-2 appears on your console. A general description of each required field follows.

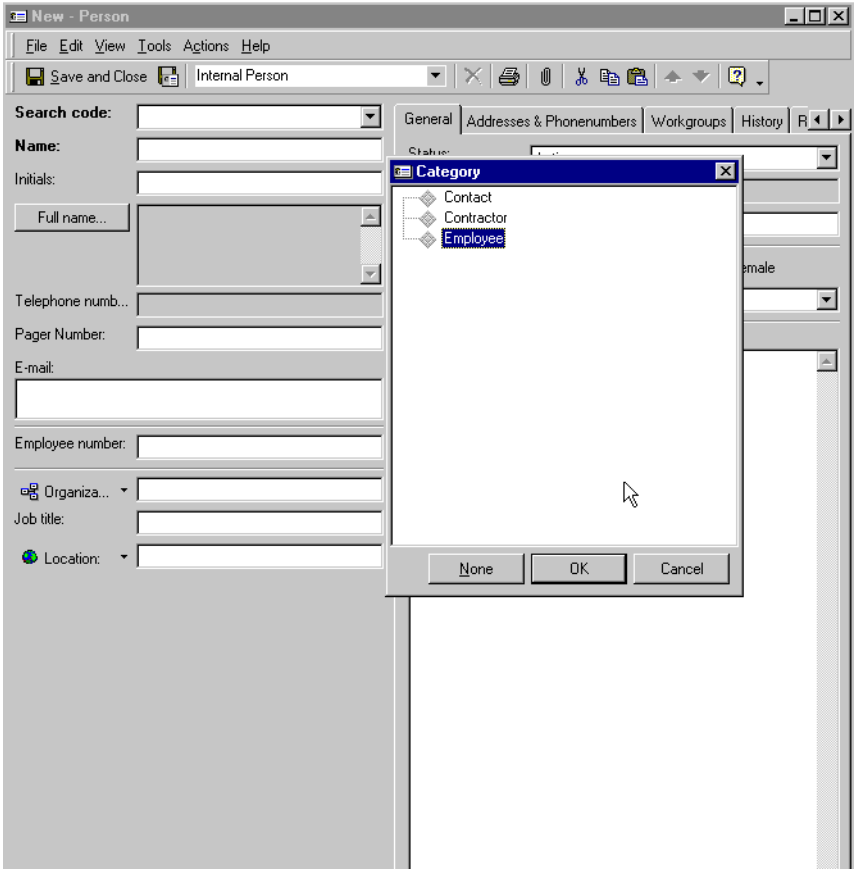
- `Search Code`

  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.

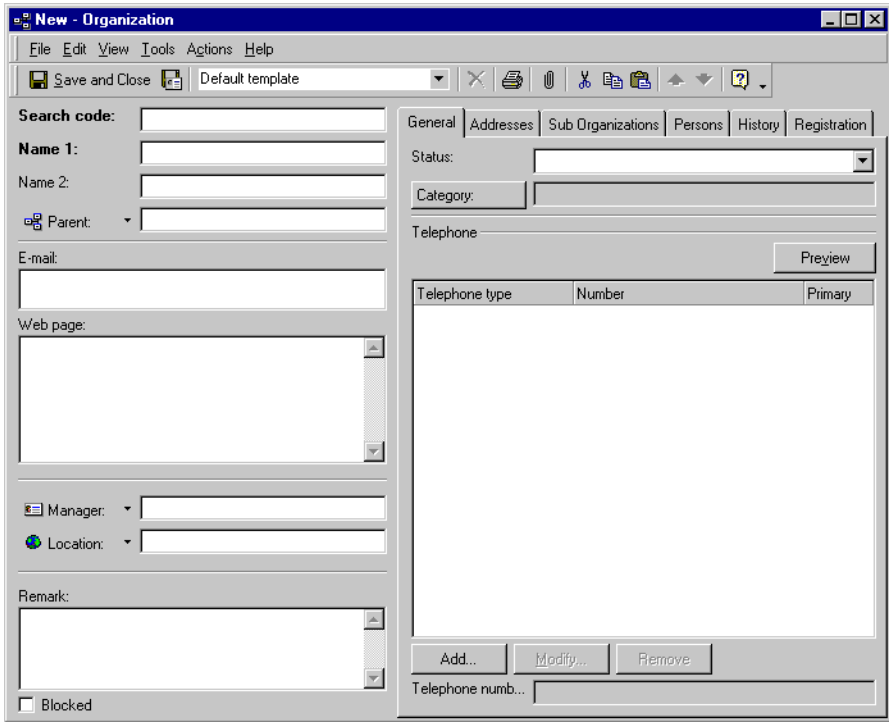
Figure 12-2 **New Person Entry**



Creating Organization Entries

When you create an Organization entry, Figure 12-3 appears on your console.

Figure 12-3 **New Organization Entry**



Creating Work Group Entries

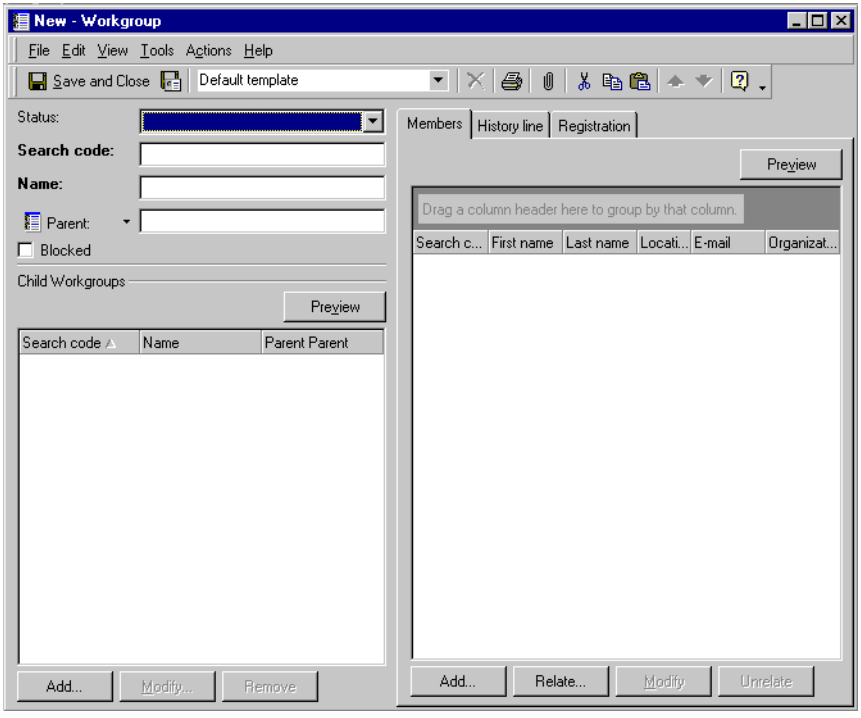
Work groups are an organizational category that group your IT specialists into functional groups. When assigning a Service Call to a specialist, a work group may be used. The details of the work group contains the names of the individual person entries for the members who can provide service. Each member is capable of performing the same tasks.

When defining workgroups, you may create a naming system which defines the shared specialization. For example, you may decide to name a work group Help Desk and another work group Network Technicians.

Since persons in your IT infrastructure may have multiple or cross-specializations, specialists can be members of many different work groups. Specialists can also be members of workgroups which cross geographical locations. A work group may also include contractors from external organizations as well as internal organizations.

When you wish to create a Work Group entry, Figure 12-4 appears on your console.

Figure 12-4 New Workgroup



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 entries for all Service Desk users based on their person entry.

First, the system administrator must create a logon name. The login name for the users could be the same as their person entry search code but this is not a requirement. The system administrator must also create a password for the user to initially log in to Service Desk or SP.

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 *Service Desk System Administrator Guide*.

Determining Service Desk Roles Privileges

For each configured Service Desk user, the system administrator can determine their specific role. In defining roles, each Service Desk user should have clearly defined responsibilities that do not overlap. For example, a help desk operator should not be provided rights to create change requests. This prevents other Service Desk roles from accessing each others work and manipulating entries without the process owner's knowledge. 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

To create templates and actions, the system administrator will need to discuss the settings with the appropriate process owners. Within this context, the system administrator can enter the defaults. For example, if IT infrastructure management would like a separate new employee template for contractors and permanent employees, the system administrator would consult with management to determine their exact specifications and create the proposed templates. The system manager should not create the template without consulting the process owners. A template should be created with the intended users' input or a template without value will be created.

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.

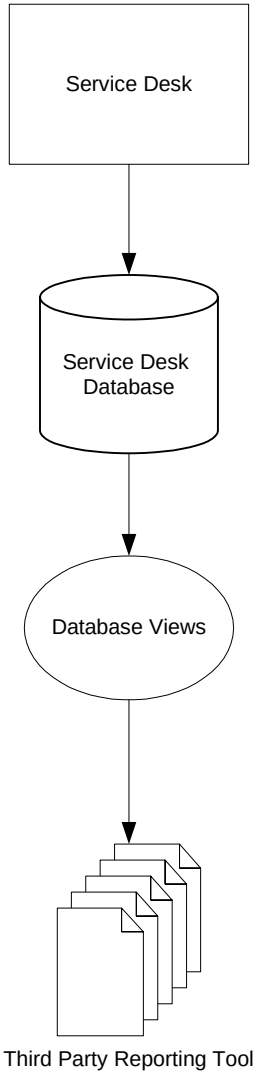
Using Service Desk, you can create reports that provide an effective method of managing your IT management processes.

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.

Figure 13-1 Reporting Process



Scenario: A Customer Profile

An organization with a distributed computing environment has recently deployed Service Desk. The organization has five offices. The system administrator, Steven, manages all of the systems and application administration duties for the entire organization. Service Desk allows him the flexibility to set up and customize Service Desk according to his business organization needs for every location.

He assigns different responsibilities and roles to IT specialists. Each of the five offices has an IT manager that Steven provides rights to all Service Desk roles, although Steven retains overall responsibility.

To simplify configuration management, Steven was provided guidelines for defining CI codes and asked to modify the standard New Configuration Item template to add a text field indicating the guidelines for CI codes.

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