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# HP NGOSS Software



## **Incident & Problem Management Extension Intervention Management User Guide**

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# Preface

This guide describes how to use intervention module of the value package.

## Intended Audience

Prior knowledge of Service Manager and related knowledge is required..

## Software Versions

The software versions referred to in this document are as follows:

IPM	Operation system
1.0	Server: Windows2003/2008 Client: Windows XP, Vista, Windows 7

Service Manager version:7.11/9.20

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# Chapter 1

## Intervention Overview

### 1.1 Purpose

The intervention management process is used to manage simultaneously tasks performed by different support team which can reduce the resolution time for the incident.

Intervention is created from a recording incident.

The goals of the intervention management process are:

- Create Interventions from an incident
- Assign interventions to the correct work groups either manually or automatically for execution
- Track and Manage progress of the intervention
- Track the historic activities of the intervention
- Manage the intervention queue

Objective	Allows you to assign tasks to different heads in order to resolve as quickly as possible a particular incident, to minimize the negative impact on current operations.
Functions	Complements the process of resolution of incident management. Allows management activities directly connected to the module incident. Allows optimum use of the management function Reminders. Provides appropriate notifications (email, pages) agreements service level
Advantages	Reduces time to resolution. Allows non-sequential, simultaneous analysis of incidents

# Chapter 2

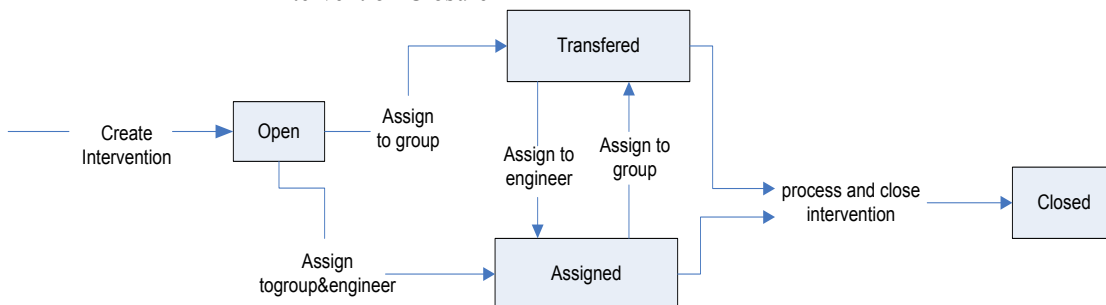
## Intervention Workflows

### 2.1 Process Introduction

The Intervention Management process logs, investigates, diagnoses, and resolves interventions. Interventions can be created from an incident or through Intervention Creation Wizard. The process includes all necessary steps to log and resolve an intervention, including any transfer or reassignments.

The Intervention Management process consists of the following processes, which can be described by the intervention workflow chart:

- Intervention Creation
- Intervention Assignment
- Intervention Process(Diagnosis and Recovery)
- Intervention Closure



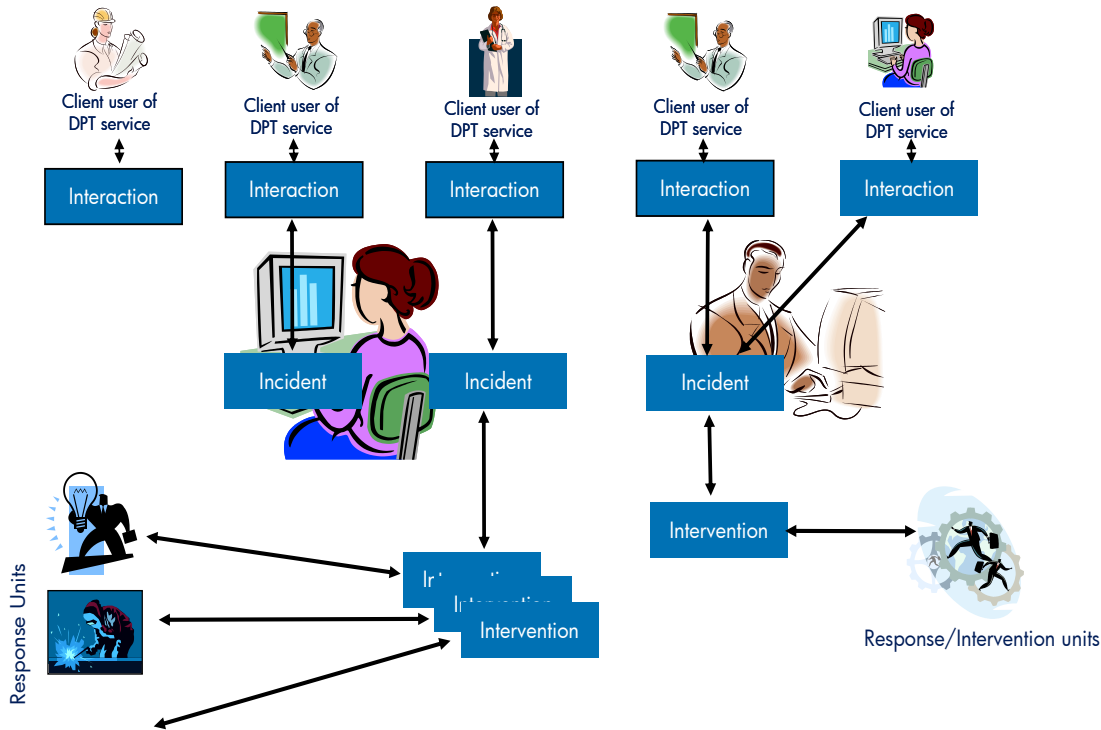
The key activities in the intervention management process are:

- Create intervention in the system: The system will provide support for managing intervention tasks in addition to managing incidents
- Assign to the correct group or person: Send the intervention to the correct work group or person that needs to execute the tasks.
- Evaluate and diagnostic intervention: The assignee can acquire necessary information through Service Manager system to evaluate intervention Tasks
- Perform intervention tasks: At the scheduled time, execute the tasks outlined in the intervention
- Record intervention results: Record the results from executing the intervention in the system so that the results can be provided to the originator
- Review and Close Intervention: Review the results of the intervention and close it.

## 2.2 Relationship with other objects

### 2.2.1 Relationship between Interaction / Incident / Intervention

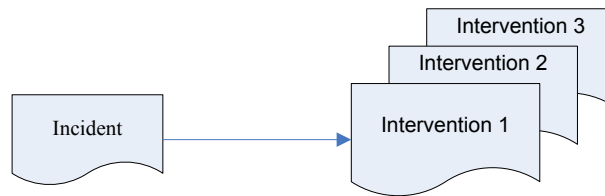
This diagram shows the relationships between objects Interaction / Incident / Intervention



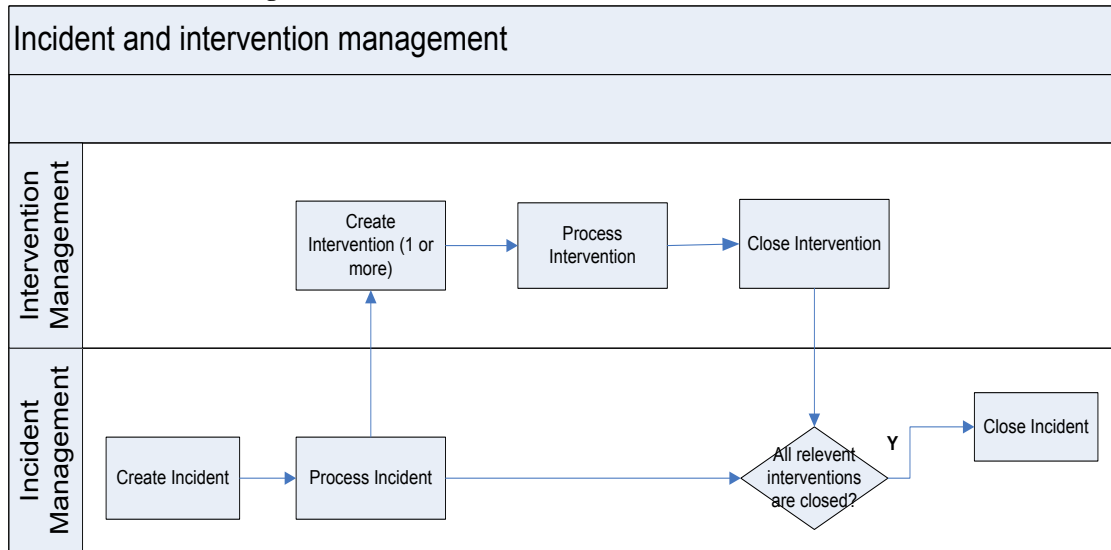
- Client user calls Service Desk to report a service request.
- Service Desk record the Contains contact information, recipient of the service, relevant articles and call details (title and description, category, urgency, impact and priority). An interaction is created.
- If the Service Desk decides whether an incident needs to be created or linked. He can directly close the interaction or link it to an incident. Multiple interactions can link to one incident.
- The support team decides whether interventions need to be created. Several interventions can be active simultaneously for the same incident.

### 2.2.2 Relationship between Incident and Intervention

The Intervention Management process is used to support incident management process. It can be created from an incident or through Intervention Creation Wizard. An incident can create multiple intervention tasks. Only when all intervention tasks are closed can the incident be closed.



The chart shows the relationship between incident management system and intervention Management module.





## Chapter 3

# Intervention Management

### 3.1 Create an Intervention

Interventions can be created from incident management module. All relevant information relating to an incident such as ID, Category, Priority, Affected Service, Affected CI, Location etc, must be logged so that future assigned support group personnel can be better able to perform intervention tasks.

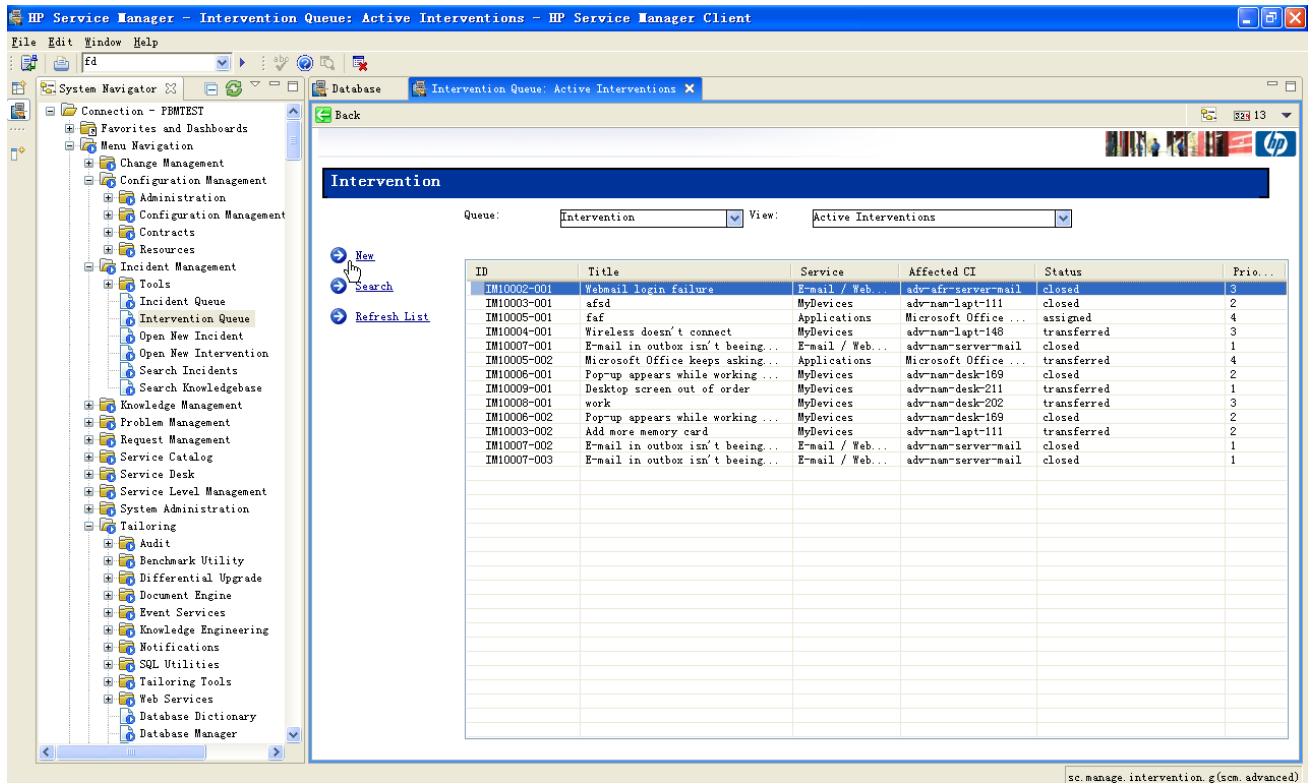
Operator investigates an incident to determine if it needs to create an intervention or multiple interventions to expedite the incident's resolution. Operators can open an Intervention tasks through the two ways:

- Create new intervention through Intervention Creation Wizard
- Create new intervention from an Incident button

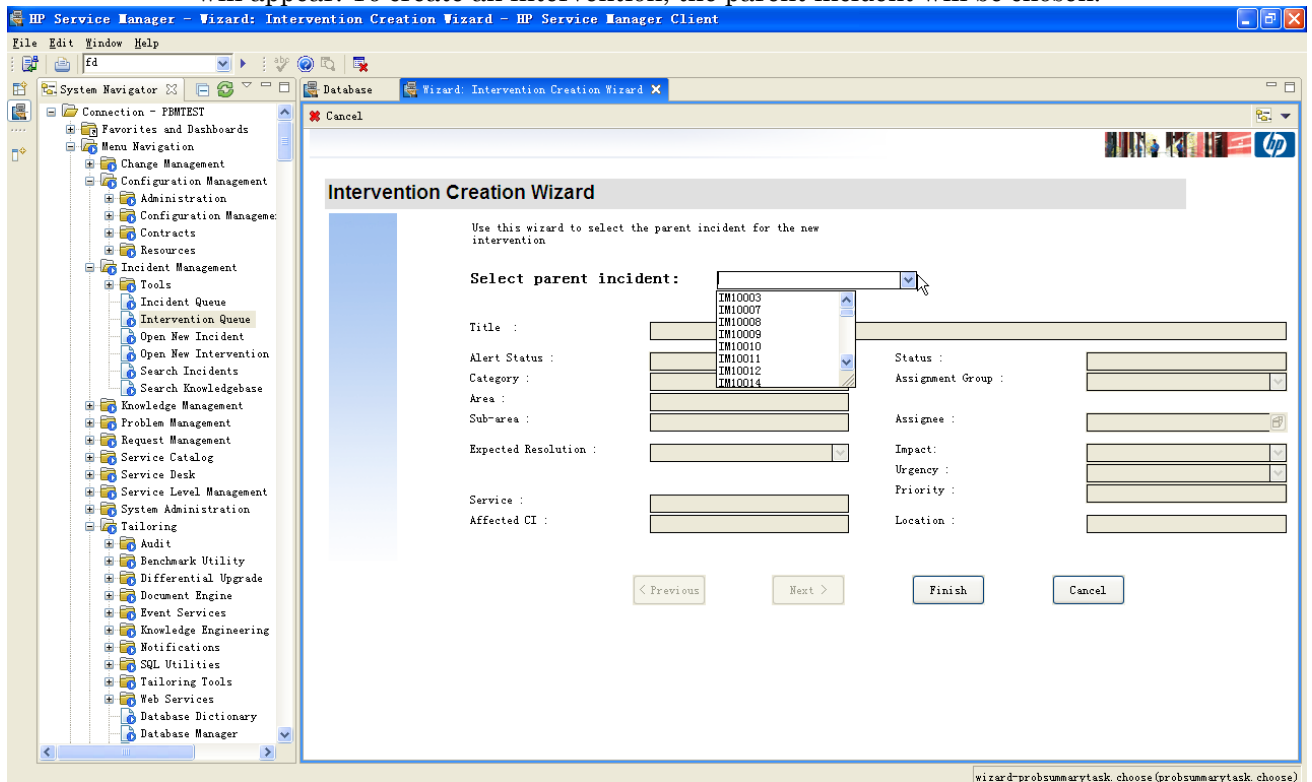
#### 3.1.1 Intervention Creation Wizard

After successfully installing the package of intervention module, you will see to menus in the menu bar:

- Intervention Queue
- Open New Intervention



Click 'Open New Interventions', the 'Intervention Creation Wizard' form will appear. To create an intervention, the parent incident will be chosen.



Here we choose IM10003 for an example; the incident information will be automatically filled in.

**Error! Use the Home tab to apply Chapter to the text that you want to appear here.**

HP Service Manager - Wizard: Intervention Creation Wizard - HP Service Manager Client

File Edit Window Help

System Navigator

Database Wizard: Intervention Creation Wizard

Cancel

### Intervention Creation Wizard

Use this wizard to select the parent incident for the new intervention

Select parent incident:

Title :

Alert Status :  Status :

Category :  Assignment Group :

Area :  Assignee :

Sub-area :  Impact :

Expected Resolution :  Urgency :

Service :  Priority :

Affected CI :  Location :

< Previous Next > Finish Cancel

wizard-probsummarytask.choose (probsummarytask.choose)

Click 'Next', you will see the intervention detail form. The fields marked with gray are information from parent incidents and could not be modified. You can fill in some instruction in 'Description and Instruction' field.

HP Service Manager - New Intervention from Parent Incident: IM10003 - HP Service Manager Client

File Edit Window Help

System Navigator

Database Wizard: Intervention Creation Wizard New Intervention from Parent Incident: IM10003

Cancel Find Fill Submit

### New Intervention from Parent Incident: IM10003

ID Intervention :  Status :

Assignment

Assignment Group :

Assignee :

Affected Item

Service :  Affected CI :

Description and Instruction

Add more memory card

Incident Description

System crash with message not enough memory while opening multiple applications

Intervention Detail

Open Time :  Close time :  Expiration Time :

Work Duration (j hh:mm:ss) :  Transportation Duration (j hh:mm:ss) :

Owner :  Nature intervention :

Incident Information

Parent Incident :

Category :  Area :  Sub-area :

Impact :  Urgency :  Priority :

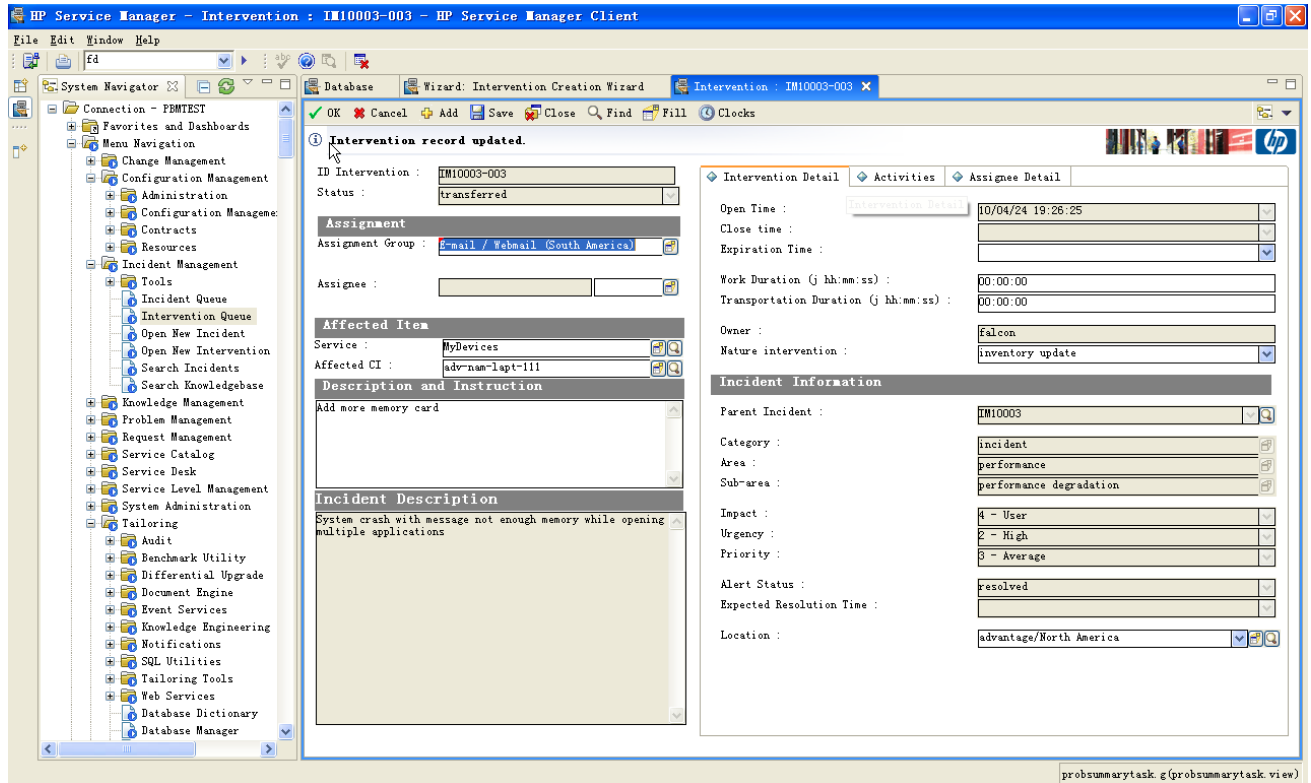
Alert Status :  Expected Resolution Time :

Location :

probsummarytask.g (probsummarytask.view)

Before submitting the intervention, an assignment group must be chosen.

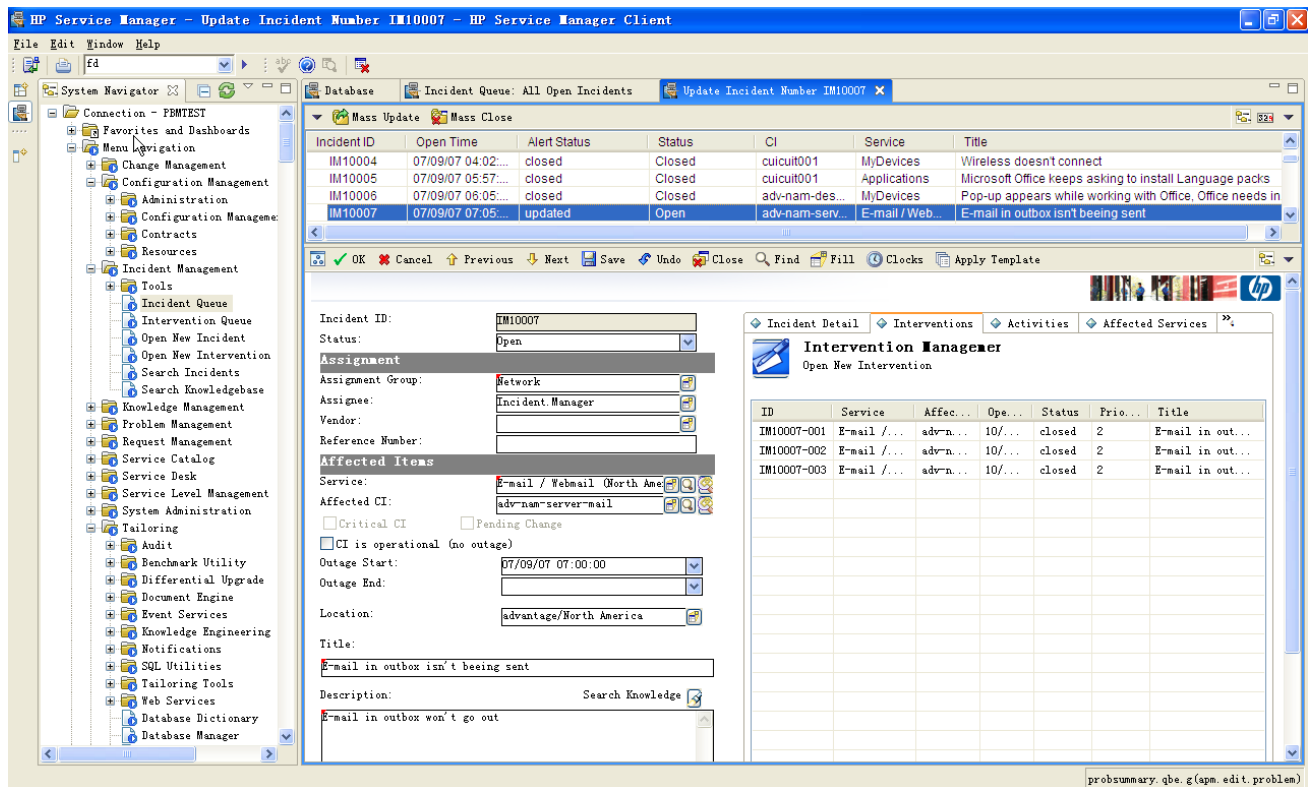
Select a group and click 'Submit', the Intervention ID is automatically generated. The status is changed to 'transferred'. Click 'OK' to save the intervention. You can go to the 'Intervention Queue' to view the intervention.



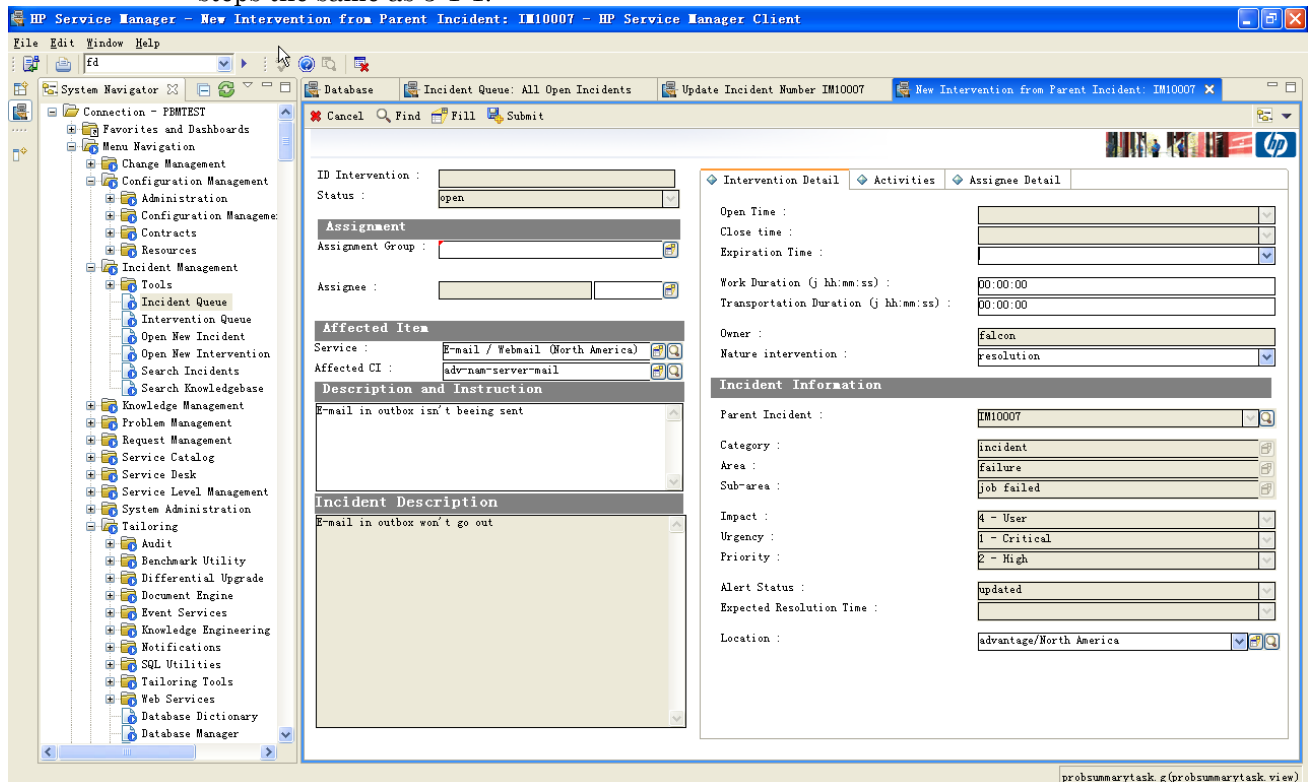
### 3.1.2 Create intervention from an Incident button

Open an incident which status is not 'closed'. After successfully installing the package, you will see the 'Open New Intervention' button.

Error! Use the Home tab to apply Chapter to the text that you want to appear here.



Click the button, the intervention detail will be shown. You can follow the steps the same as 3-1-1.



After click 'OK", you will return to the incident form. Click 'OK' to save the intervention.

HP Service Manager - Intervention : IM10007-004 - HP Service Manager Client

File Edit Window Help

System Navigator

Database Incident Queue: All Open Incidents Update Incident Number IM10007 Intervention : IM10007-004

Intervention record updated.

ID Intervention : IM10007-004

Status : transferred

Assignment

Assignment Group : Field Support (Asia)

Assignee : Falcon

Affected Item

Service : E-mail / Webmail (North America)

Affected CI : adv-nam-server-mail

Description and Instruction

E-mail in outbox isn't being sent

Incident Description

E-mail in outbox won't go out

Intervention Detail

Open Time : 10/04/24 19:31:13

Close time : 00:00:00

Expiration Time : 00:00:00

Work Duration (j hh:mm:ss) : 00:00:00

Transportation Duration (j hh:mm:ss) : 00:00:00

Owner : Falcon

Nature intervention : resolution

Incident Information

Parent Incident : IM10007

Category : Incident

Area : Failure

Sub-area : Job failed

Impact : 4 - User

Urgency : 1 - Critical

Priority : 2 - High

Alert Status : updated

Expected Resolution Time : 00:00:00

Location : advantage/North America

probsumarytask.g(probsumarytask.view)

From an incident, multiple interventions can be created. Here we can see four interventions are related with incident IM10007.

HP Service Manager - Update Incident Number IM10007 - HP Service Manager Client

File Edit Window Help

System Navigator

Database Incident Queue: All Open Incidents Update Incident Number IM10007

Mass Update Mass Close

Incident ID	Open Time	Alert Status	Status	CI	Service	Title
IM10004	07/09/07 04:02...	closed	Closed	cuicuit001	MyDevices	Wireless doesn't connect
IM10005	07/09/07 05:57...	closed	Closed	cuicuit001	Applications	Microsoft Office keeps asking to install Language packs
IM10006	07/09/07 06:05...	closed	Closed	adv-nam-des...	MyDevices	Pop-up appears while working with Office, Office needs in
IM10007	07/09/07 07:05...	updated	Open	adv-nam-serv...	E-mail / Web...	E-mail in outbox isn't being sent

Intervention Manager

Open New Intervention

Incident ID : IM10007

Status : Open

Assignment : Network

Assignee : Incident Manager

Reference Number :

Affected Items

Service : E-mail / Webmail (North America)

Affected CI : adv-nam-server-mail

Outage Start : 07/09/07 07:00:00

Outage End :

Location : advantage/North America

Title : E-mail in outbox isn't being sent

Description : E-mail in outbox won't go out

IM.update.incident(spm.edit.problem)

**Error! Use the Home tab to apply Chapter to the text that you want to appear here.**

### 3.1.3 Batch creates interventions

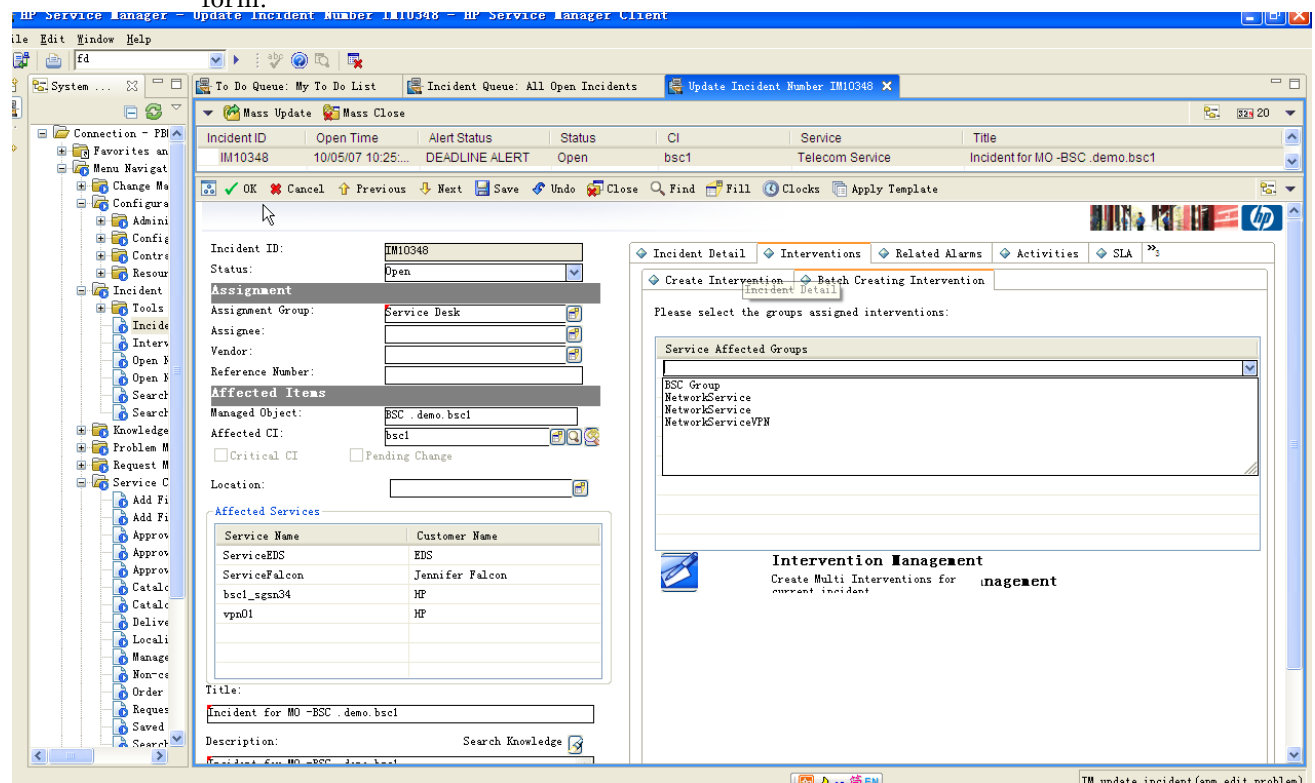
Note: This function is visible only when the incident is created from TeMIP.

Multiple interventions can be created automatically from an incident form. The following conditions must to be met:

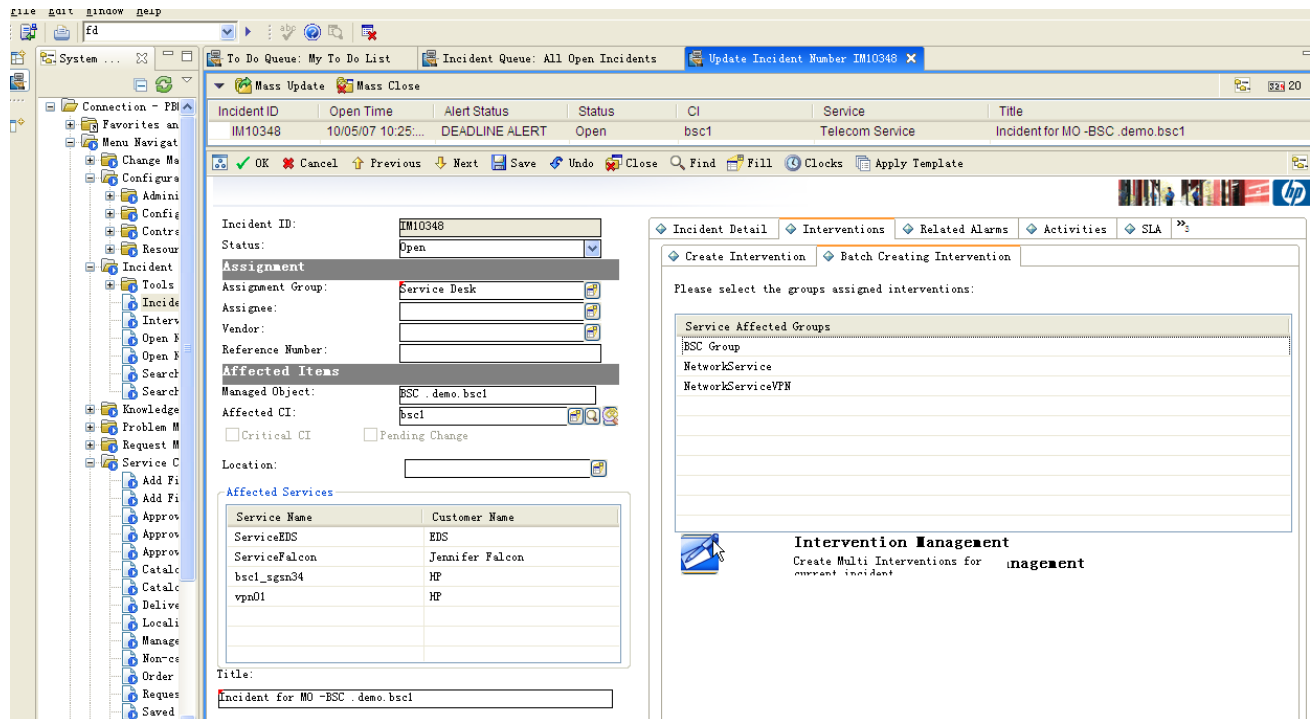
1. The incident will affect multiple CI. Typically, the incident is created from TeMIP and will affect resource, service, and customer.
2. Each CI must be configured one admin group in SM. If multiple is belong to one admin group, only one intervention will be created.

Here are the steps.

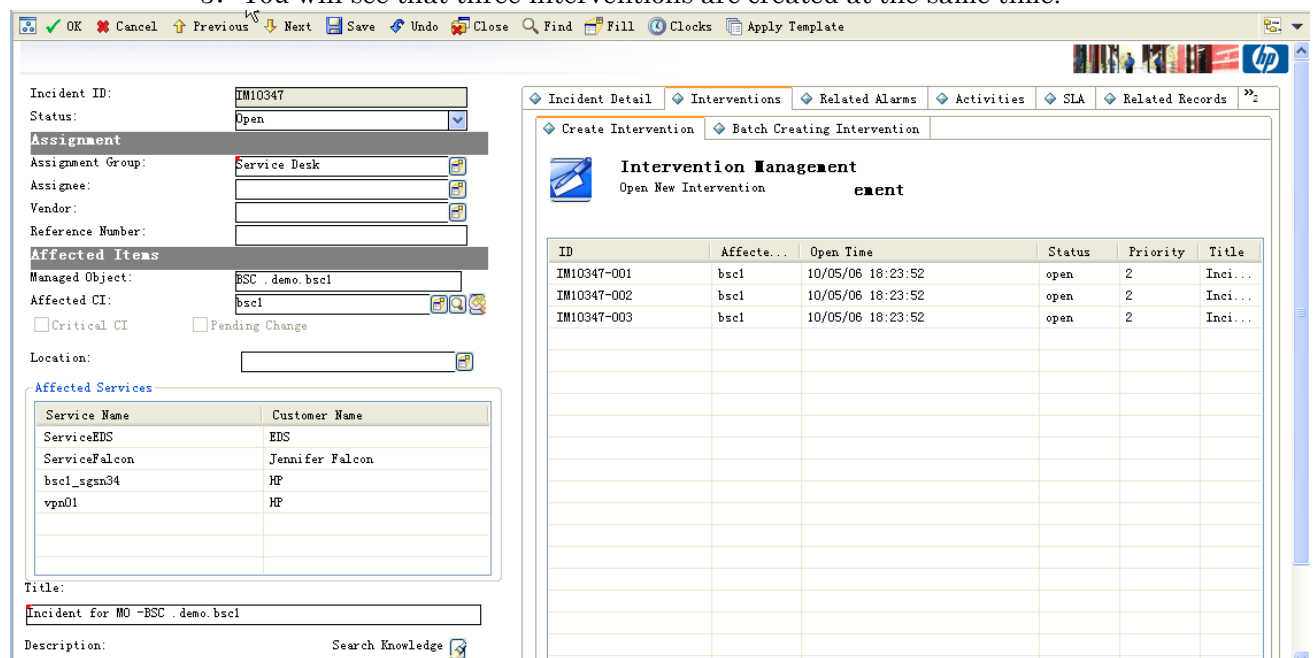
1. Open an incident which status is not 'closed'. After successfully installing the package, you will see the 'Batch creating Interventions' sub-form.



2. From Service Affected Groups, choose the group to whom you want to assign the intervention. Here we choose BSC Group, NetworkService, NetworkServiceVPN group, then click "Create Multi Interventions for current incident" button.



3. You will see that three interventions are created at the same time.



## 3.2 Search Interventions

Interventions management enables the operator to search for incident ticket records. Intervention Management displays the records in an intervention list. The search form fields enable you to narrow the search parameters. From the general search page, some familiar information can be input as the search condition. What's more, more conditions can be set



**Error! Use the Home tab to apply Chapter to the text that you want to appear here.**

through advanced filter. After you create a query that generates a list, you can save the query as a view.

From the main menu, click 'Intervention Queue' and click 'Search'.

HP Service Manager - Intervention Queue: Active Interventions - HP Service Manager Client

File Edit Window Help

System Navigator

Connection - FPMTEST

Database Intervention Queue: Active Interventions

Back

Intervention

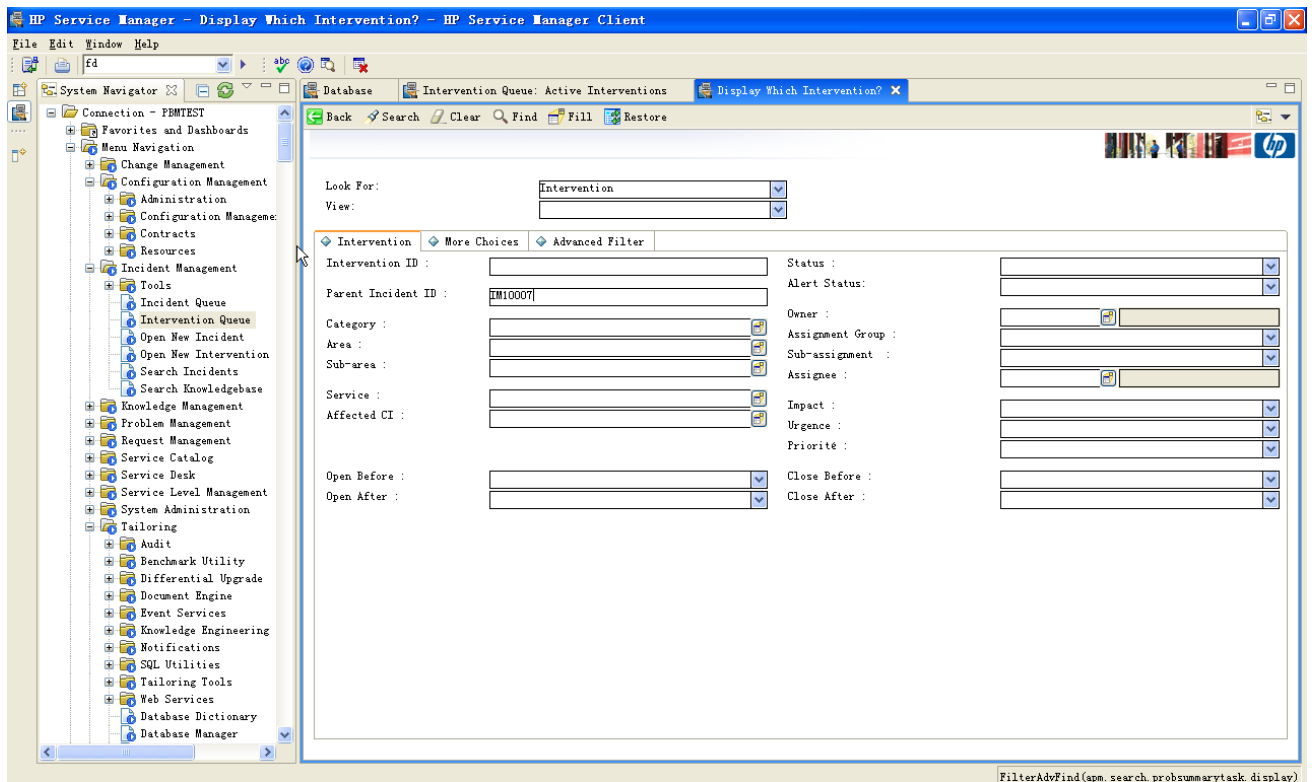
Queue: Intervention View: Active Interventions

New Search Refresh List

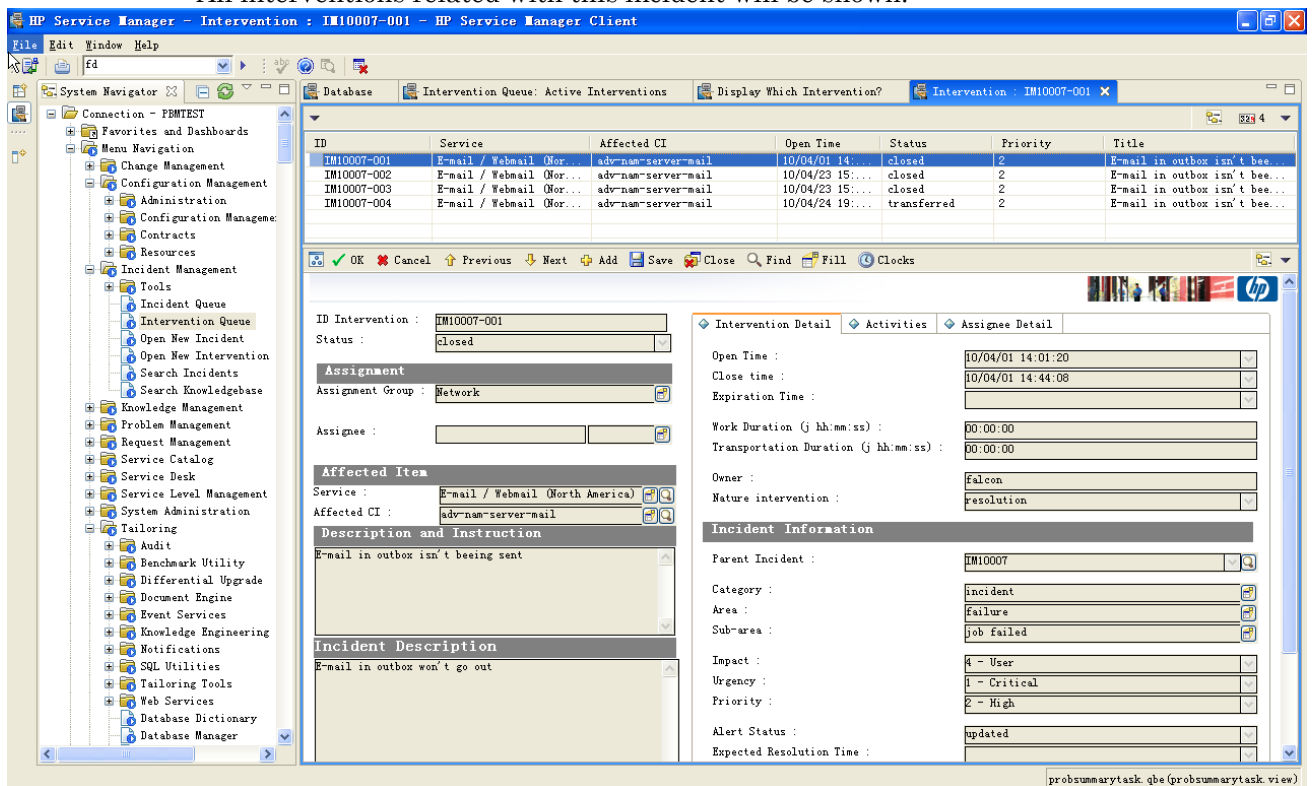
ID	Title	Service	Affected CI	Status	Priority
IM10002-001	Webmail login failure	E-mail / Web...	adv-afr-server-mail	closed	3
IM10003-001	afsd	MyDevices	adv-nam-lapt-111	closed	2
IM10005-001	faf	Applications	Microsoft Office ...	assigned	4
IM10004-001	Wireless doesn't connect	MyDevices	adv-nam-lapt-148	transferred	3
IM10007-001	E-mail in outbox isn't beeing ...	E-mail / Web...	adv-nam-server-mail	closed	1
IM10005-002	Microsoft Office keeps asking ...	Applications	Microsoft Office ...	transferred	4
IM10006-001	Pop-up appears while working w...	MyDevices	adv-nam-desk-169	closed	2
IM10009-001	Desktop screen out of order	MyDevices	adv-nam-desk-211	transferred	1
IM10008-001	work	MyDevices	adv-nam-desk-202	transferred	3
IM10006-002	Pop-up appears while working w...	MyDevices	adv-nam-desk-169	closed	2
IM10003-002	Add more memory card	MyDevices	adv-nam-lapt-111	transferred	2
IM10007-002	E-mail in outbox isn't beeing ...	E-mail / Web...	adv-nam-server-mail	closed	1
IM10007-003	E-mail in outbox isn't beeing ...	E-mail / Web...	adv-nam-server-mail	closed	1
IM10003-003	Add more memory card	MyDevices	adv-nam-lapt-111	transferred	2
IM10007-004	E-mail in outbox isn't beeing ...	E-mail / Web...	adv-nam-server-mail	transferred	1

sc.manage.intervention.g(scm.advanced)

You can go to the search form and input some search conditions in the fields. We input 'IM10007' in Parent Incident ID field.



All interventions related with this incident will be shown.



**Error! Use the Home tab to apply Chapter to the text that you want to appear here.**

## 3.3 Update Interventions

Intervention can be updated in service manager system. A full historical record can be logged by maintaining accurate and complete intervention tasks.

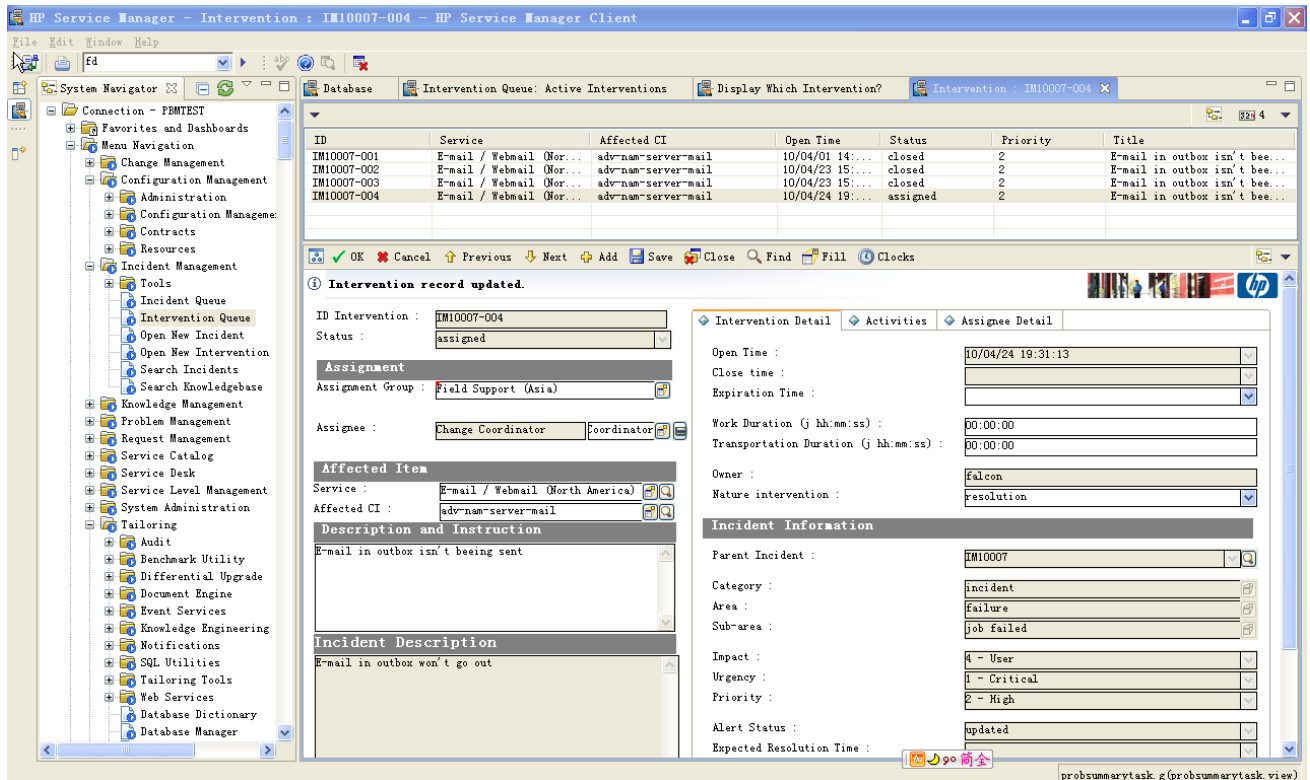
The assignee can log his activities into the system. Intervention journal is automatically updated by service manager system.

The incident information is read only in intervention form and could not be updated.

Open an intervention, “Activities’----‘Update”. In the ‘Update’ filed, you can input some information about your activities, such as analysis result, restore service action etc. Click ‘Save’ to save the intervention. You can see the historical update from the ‘Journal Updates’ form.

ID	Service	Affected CI	Open Time	Status	Priority	Title
IM10007-001	E-mail / Webmail (Nor...	adv-nam-server-mail	10/04/01 14:...	closed	2	E-mail in outbox isn't bee...
IM10007-002	E-mail / Webmail (Nor...	adv-nam-server-mail	10/04/23 15:...	closed	2	E-mail in outbox isn't bee...
IM10007-003	E-mail / Webmail (Nor...	adv-nam-server-mail	10/04/23 15:...	closed	2	E-mail in outbox isn't bee...
IM10007-004	E-mail / Webmail (Nor...	adv-nam-server-mail	10/04/24 19:...	transferred	2	E-mail in outbox isn't bee...

You can also assign the intervention to another group or person. If the ‘Assignee’ fields are not null, the intervention status will be changed to ‘assigned’.



## 3.4 Close Interventions

After a solution is implemented for an intervention, the solution must be verified, typically by the group that implemented the solution. If necessary, the user can be contacted to verify the solution. The resolving group closes the incident and notifies the Incident Coordinator to close the related incident.

When closing an intervention, the activity must be updated. Typically it is the solution to the intervention or other useful information.

Open an intervention and click 'Close'. It will notify you 'Provide an activity update'. Before you close an intervention, you must input the solution to it.

**Error! Use the Home tab to apply Chapter to the text that you want to appear here.**

HP Service Manager - Intervention : IM10007-004 - HP Service Manager Client

File Edit Window Help

System Navigator Database Intervention Queue: Acti... Intervention Queue: Acti... Display Which Intervention? Intervention : IM10007-004

ID	Service	Affected CI	Open Time	Status	Priority	Title
IM10003-003	MyDevices	adv-nam-lapt-111	10/04/24 19:31:13	transferred	3	Add more memory card
IM10007-004	E-mail / Webmail (North America)	adv-nam-server-mail	10/04/24 19:31:13	assigned	2	E-mail in outbox isn't b...

OK Cancel Previous Next Add Save Close Find Fill Clocks

**Provide an activity update**

ID Intervention : IM10007-004  
Status : closed

**Assignment**  
Assignment Group : Field Support (Asia)

Assignee : Change Coordinator Change Coord

**Affected Item**  
Service : E-mail / Webmail (North America)  
Affected CI : adv-nam-server-mail

**Description and Instruction**  
E-mail in outbox isn't being sent

**Incident Description**  
E-mail in outbox won't go out

**Intervention Detail**  
Open Time : 10/04/24 19:31:13  
Close time : 10/04/24 19:38:24  
Expiration Time :  
Work Duration (j hh:mm:ss) : 00:00:00  
Transportation Duration (j hh:mm:ss) : 00:00:00  
Owner : falcon  
Nature intervention : resolution

**Incident Information**  
Parent Incident : IM10007  
Category : incident  
Area : failure  
Sub-area : job failed  
Impact : 4 - User  
Urgency : 1 - Critical  
Priority : 2 - High  
Alert Status : updated  
Expected Resolution Time :  
Location : advantage/North America

probsummarytask.g(probsummarytask.view)

After input some update and click 'Save', the intervention status is changed to 'closed'. All fields are gray and become read-only.

HP Service Manager - Intervention : IM10007-004 - HP Service Manager Client

File Edit Window Help

System Navigator Database Intervention Queue: Acti... Intervention Queue: Acti... Display Which Intervention? Intervention : IM10007-004

ID	Service	Affected CI	Open Time	Status	Priority	Title
IM10007-004	E-mail / Webmail (North America)	adv-nam-server-mail	10/04/24 19:31:13	closed	2	E-mail in outbox isn't b...

OK Cancel Previous Next Add Save Close Find Fill Clocks

**Intervention record updated.**

ID Intervention : IM10007-004  
Status : closed

**Assignment**  
Assignment Group : Field Support (Asia)

Assignee : Change Coordinator Change Coord

**Affected Item**  
Service : E-mail / Webmail (North America)  
Affected CI : adv-nam-server-mail

**Description and Instruction**  
E-mail in outbox isn't being sent

**Incident Description**  
E-mail in outbox won't go out

**Intervention Detail**  
Open Time : 10/04/24 19:31:13  
Close time : 10/04/24 19:39:29  
Expiration Time :  
Work Duration (j hh:mm:ss) : 00:00:00  
Transportation Duration (j hh:mm:ss) : 00:00:00  
Owner : falcon  
Nature intervention : resolution

**Incident Information**  
Parent Incident : IM10007  
Category : incident  
Area : failure  
Sub-area : job failed  
Impact : 4 - User  
Urgency : 1 - Critical  
Priority : 2 - High  
Alert Status : updated  
Expected Resolution Time :  
Location : advantage/North America

probsummarytask.g(probsummarytask.view)

Note: You must close all related interventions before closing an incident.  
Or it will pop up an notification. Shown as below

The screenshot shows the HP Service Manager interface with an incident form. A warning dialog box is displayed in the center, preventing the incident from being closed due to open interventions.

**Incident Form Fields:**

- Incident ID: IM10007
- Status: Open
- Assignment Group: Network
- Assignee: Incident Manager
- Vendor:
- Reference Number:
- Affected Item: Service
- Affected CI: ☐ Critical CI, ☐ CI is operational
- Outage Start:
- Outage End:
- Location: advantage/North America
- Title: E-mail in outbox isn't beeing sent
- Description: E-mail in outbox won't go out

**Incident Detail Panel:**

- Category: Incident
- Area: failure
- Sub-area: job failed
- Priority: 4 - User, 1 - Critical, 2 - High
- Problem Management Candidate: ☐ Candidate for Knowledge DB
- Closure Code:
- Solution:

**Warning Dialog Box:**

Information icon: Attention! You could not close this incident unless all related interventions are closed. Button: 确定 (OK).

After an incident is closed, all related interventions will be shown in 'Related Records' form.

The screenshot shows the HP Service Manager interface with the 'Related Records' form for a closed incident. The incident is now closed, and the related interventions are listed in the 'Related Records' panel.

**Incident Form Fields:**

- Incident ID: IM10006
- Status: Closed
- Assignment Group: Service Desk
- Assignee: Incident Coordinator
- Vendor:
- Reference Number:
- Affected Item: MyDevices
- Affected CI: adv-nam-desk-169
- Outage Start: 07/09/07 06:00:00
- Outage End: 10/04/12 14:00:18
- Location: advantage/North America
- Title: Pop-up appears while working with Office, Office needs installation o
- Description: Everyday around lunch time my PC starts rebooting for no apparent rea

**Related Records Panel:**

ID	Service	Affe...	Op...	Status	Pri...	Title
IM10006-001	MyDevices	adv...	10/...	closed	3	Pop...
IM10006-002	MyDevices	adv...	10/...	closed	3	Pop...

## 3.5 Intervention Queue

Intervention queue is used to manage all intervention tasks. In the intervention queue, customized views can be defined to have a quick access to intervention list. Through intervention queue form, intervention can also be created and searched by related button.

Two default views are defined for interventions. 'Active Interventions' and 'My Active Interventions'. You can view that from the intervention queue. You can also create customized view for this queue.