

ITSM Module User Guide

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Incident and Service Request Management

1. Urgency and Impact

The Urgency and Impact lookup fields are added to the page.

- *Impact* is the potential influence that unresolved request has on the company's ability to perform effectively its operations or provide services. For example, the failure of a server that supports a large number of customers can be considered as having a *High* impact on the business.
- *Urgency* stands for the time considered sufficient to resolve the request. For example, there may be a low urgency if a temporary correction or a workaround is available.

The screenshot displays a service request management interface for Case #SR_203. The case title is "The customer cannot create an account on the site." The interface includes a sidebar with navigation icons, a top bar with "SAVE", "CANCEL", "ACTIONS", and "RESOLVE" buttons, and a search bar. The main content area shows the case details, including a resolution time of 1/10/2018 at 5:00 PM. A red box highlights the "Urgency" and "Level of Impact" fields, which are set to "01 - High" and "02 - Medium" respectively. The "Priority" field is set to "High". The "Contact" field is "Travis Barker". The "Account" field is "Gateway". The "SLA" field is "1 - Default service contract". The "Category" field is "Service request". The "Service" field is "Web-site usage". The "Next Steps" section shows two tasks: "Discuss additional ways to solve case SR_203" and "Propose resolution options for the case SR_203". The "History" section shows a message from a supervisor dated 10/25/2017 at 11:30 AM via Feed, stating: "Dear colleagues, I am not able to find the 'How to create an account on the site' article. Could someone help me and provide me with this information?"

After the service group agent fills in the **Impact** and **Urgency** fields in the request record, the Priority field is populated automatically based on the values of the priority matrix. The priority values for requests help to determine the order in which the requests will be processed.

Lookups			What can I do for you?
NEW CLOSE ACTIONS			
Dependence of case priority on urgency and impact level			
Filter			
Urgency	Level of impact	Case priority	
01 - High	03 - Low	Medium	
02 - Medium	02 - Medium	Medium	
03 - Low	01 - High	Medium	
01 - High	02 - Medium	High	
03 - Low	02 - Medium	Low	
03 - Low	03 - Low	Low	
01 - High	01 - High	Critical	
02 - Medium	03 - Low	Low	
02 - Medium	01 - High	High	

The priority matrix is based on the ITIL (Information Technology Infrastructure Library) concept, which states the paramount importance of the Impact and Urgency in determining the relative Priority, according to which elements of the sequence, such as service group requests, should be processed.

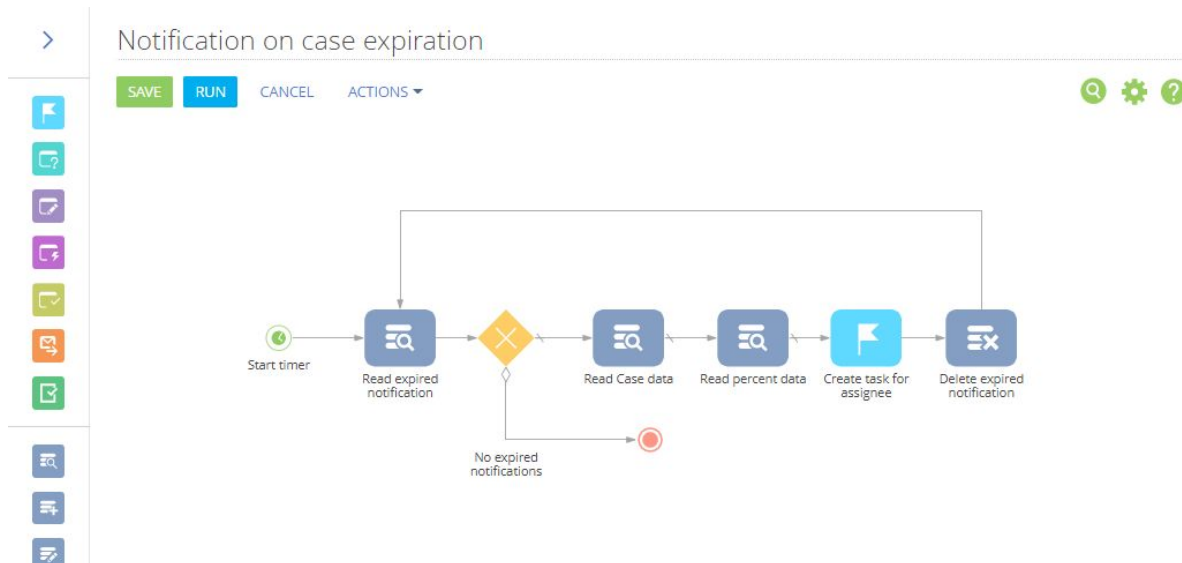
2. Calculation of the percent of time passed from the reaction and resolution term. Notifications about the upcoming deadline for Cases response and/or resolution

This mechanism is used if the action should be performed when, for example, 50% of the total reaction and / or resolution time has passed. The normative values of response / resolution terms (percentage of total term) are specified in the lookup called "List of percents of the time passed for reminders".

Lookups		What can I do for you?
NEW CLOSE ACTIONS		
List of percents of the time passed for reminders		
Filter		
Name	Percent Value	
90 %	90	
75 %	75	
50 %	50	
1 %	1	

Every time the term of the request response or resolution is recalculated, the system fixes the normative percent values. In case of deviation from the standard, the system can create a notification to the responsible person or the supervisor of the

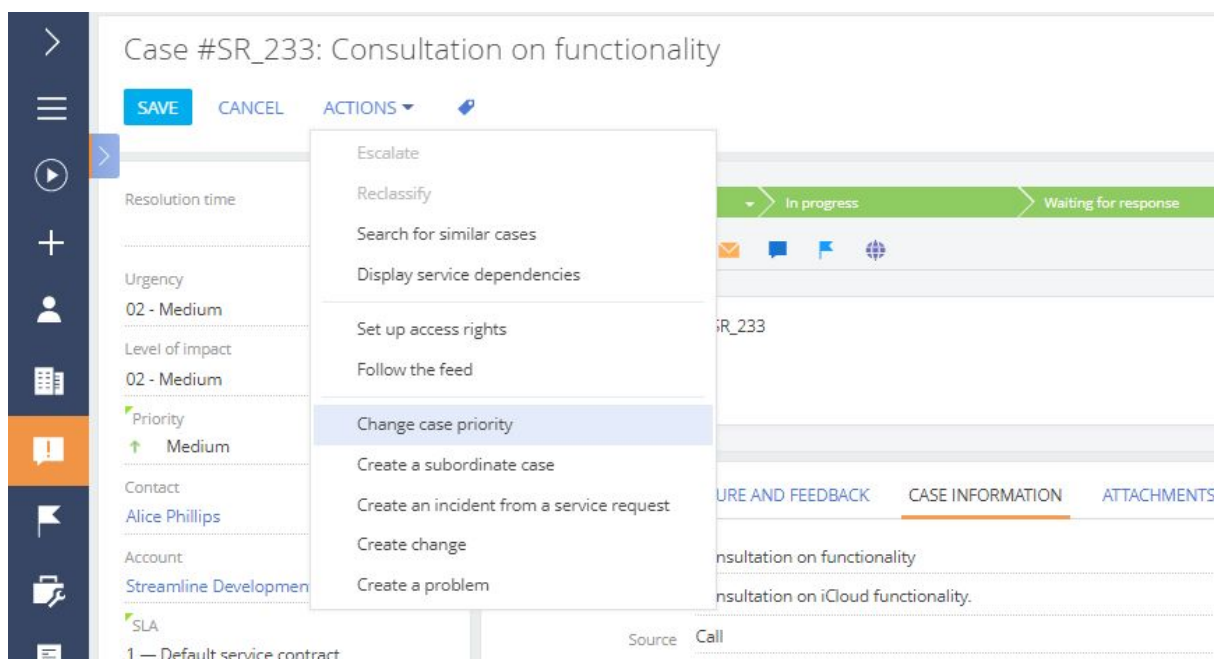
responsible person. This functionality is carried out through the process called "Notification on case expiration"



3. Indication of reasons for changing the priority

When processing a request, the responsible employee can use the process to change the priority.

The process is run through the "Actions" button.



The user specifies the priority value and the reason for changing the priority of the request.

> Change case priority

SAVE CANCEL CLOSE

Priority Low

Reason of change of priority The problem of this case is the cause of system failures

4. Use the solution from the Knowledge Base article

When processing a request, responsible employee can use the knowledge base article as a solution to the request. To do this, the user needs to attach the article to the request and click "Use as Solution".

Case #SR_205: It is necessary to restore access to remote desktop

What can I do for you?

CLOSE ACTIONS RESOLVE RUN PROCESS

Assign to me

Support level: 3rd-line support
Created: 9/5/2016 at 10:21 AM

Problems + : No data

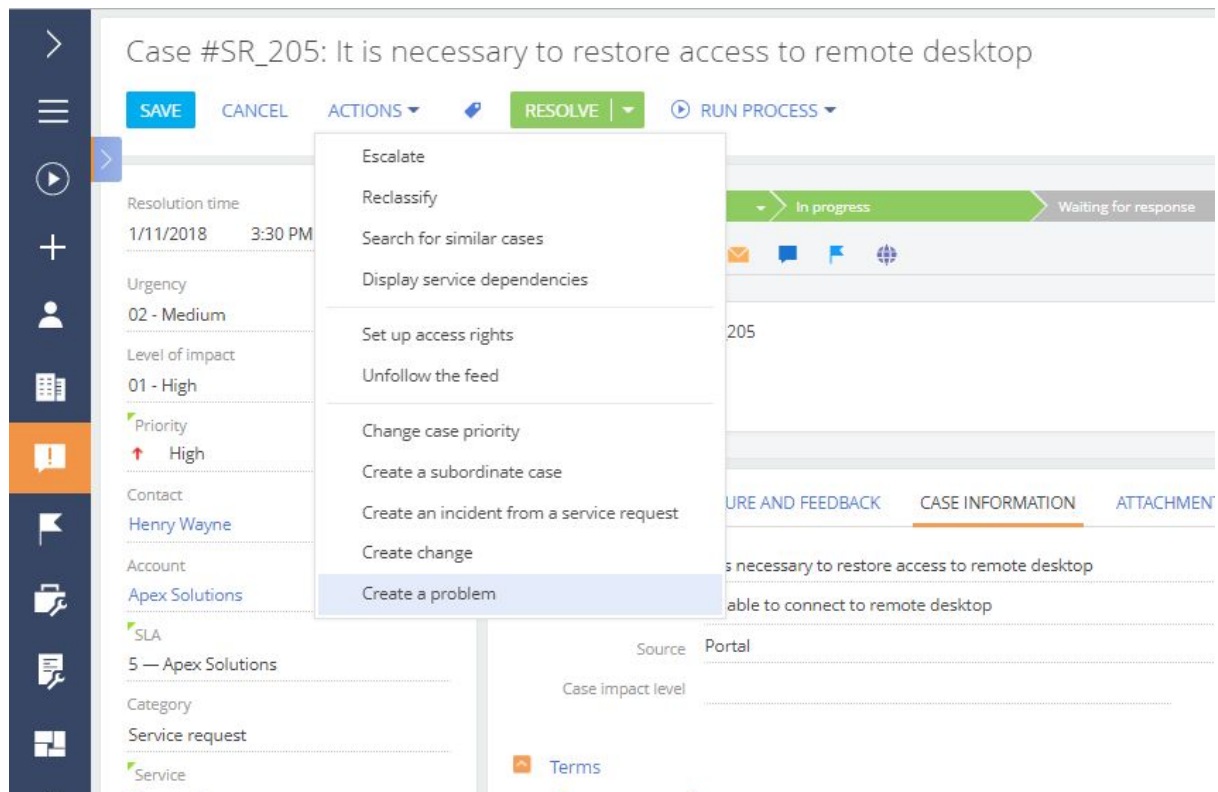
Knowledge base articles + : ⌕

Name	Type	Code
What to do when your laptop's touchpad stops working	FAQ	11
Field sales presentation	Rules and regulations	197-54

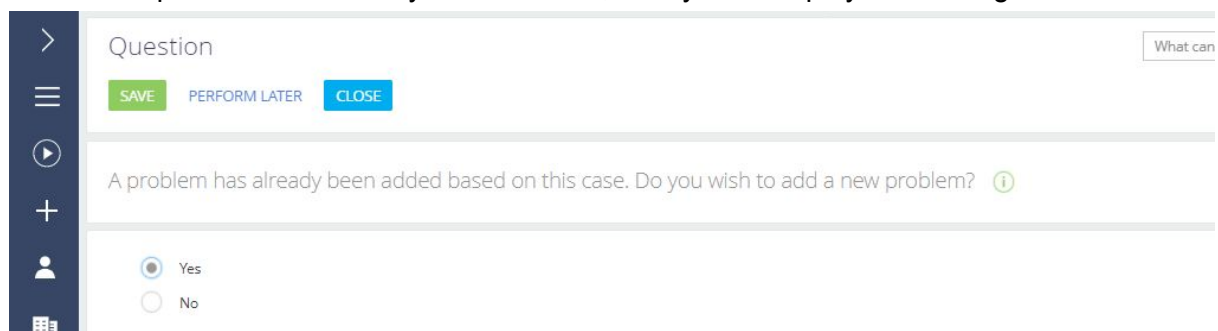
Use as a resolution

5. Fast creation of the Problem from the Case

The system allows you to quickly create a Problem from the case automatically duplicating the main fields (subject, description, service) values and links (configuration units, requests).

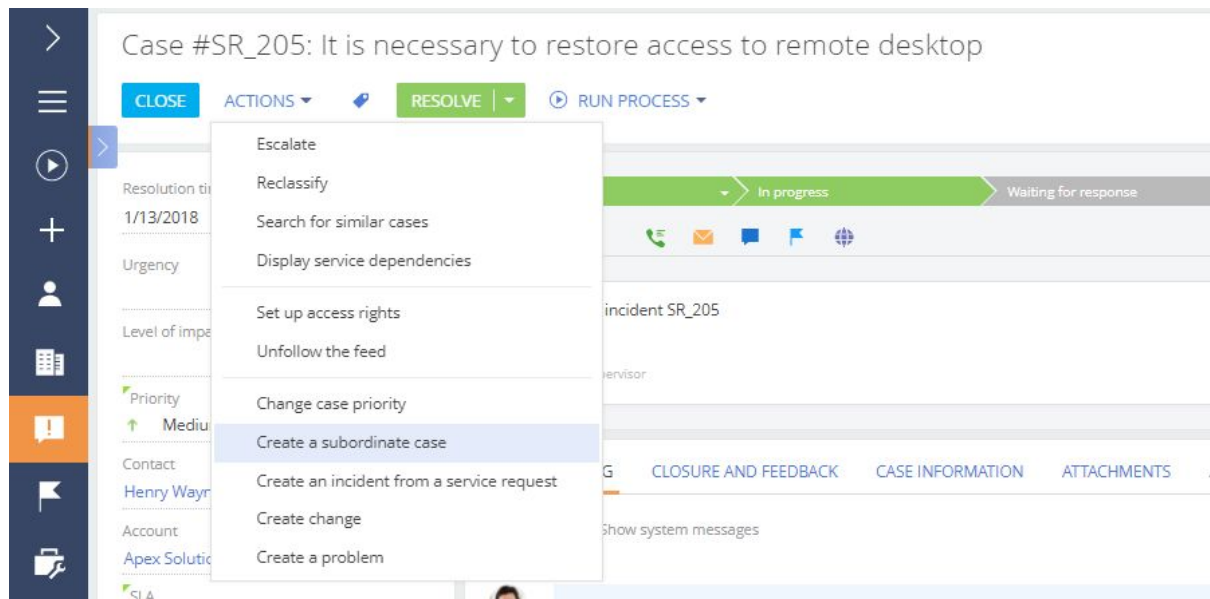


In case the problem has already been created, the system displays a warning.



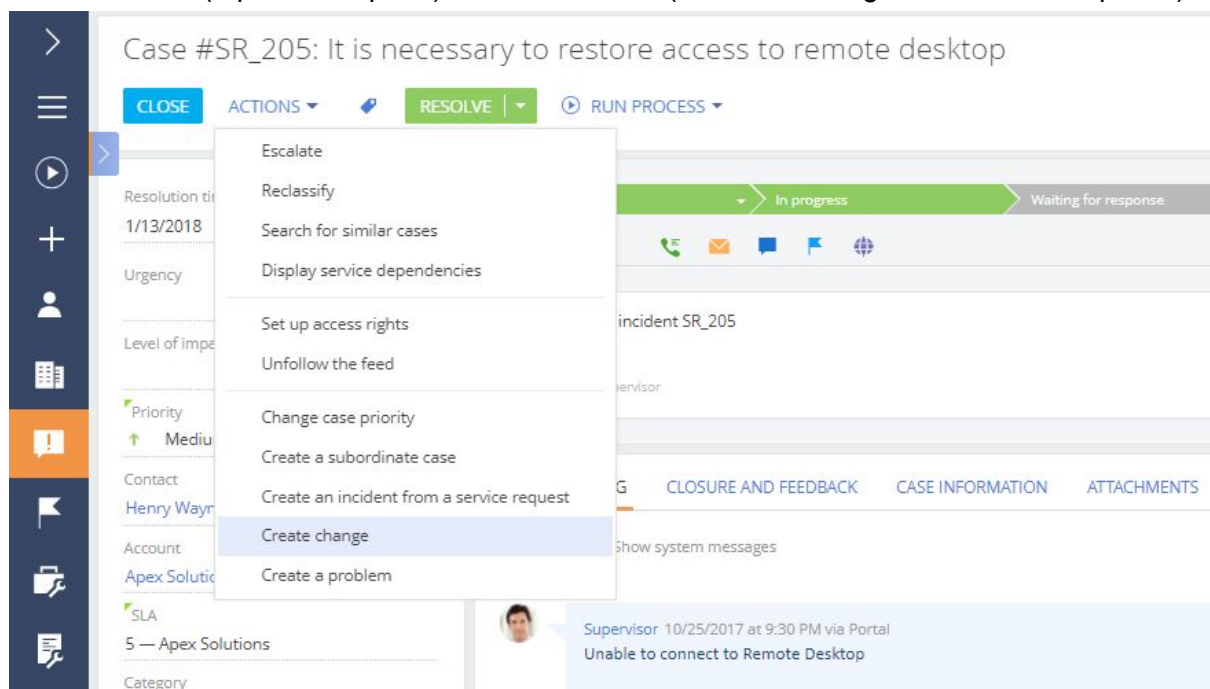
6. Fast creation of subordinate case from the parent case

The system allows you to quickly create a subordinate case, automatically duplicating the main fields (subject, description, category) values and establishing links with the subordinate case.



7. Fast creation of a Change from a case

The system allows you to quickly create changes from the case, automatically duplicating the main fields (topic, description) values and links (services, configuration items, requests).

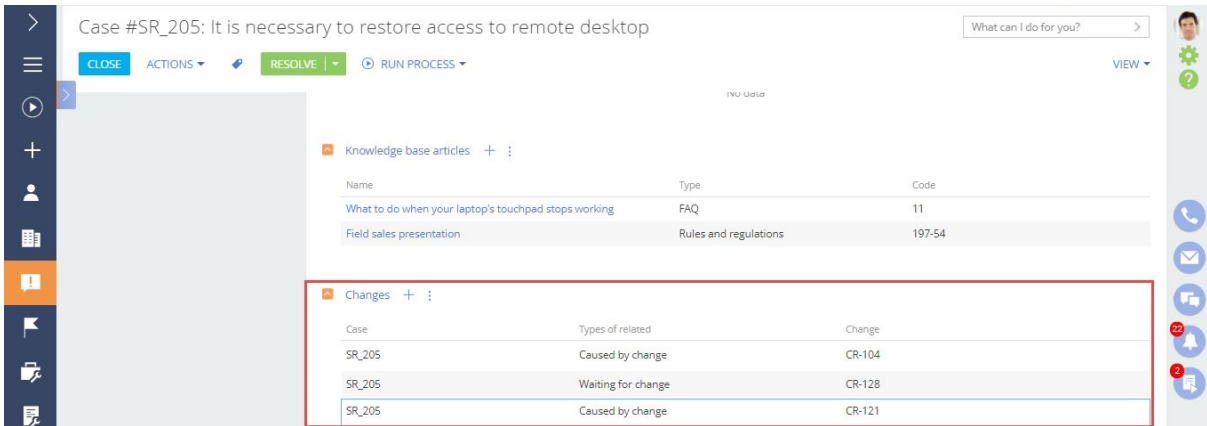


8. Different types of links between Request and Change

The system allows you to configure different types of links between Requests and Changes in order to track the following types of Cases:

- Waiting for changes - requests due to which the Change was initiated or, which should be resolved as a result of the Change resolution

- Caused by a change - requests that occurred as a result of the implementation of the Change



Case #SR_205: It is necessary to restore access to remote desktop

What can I do for you?

CLOSE ACTIONS RESOLVE RUN PROCESS VIEW

Knowledge base articles

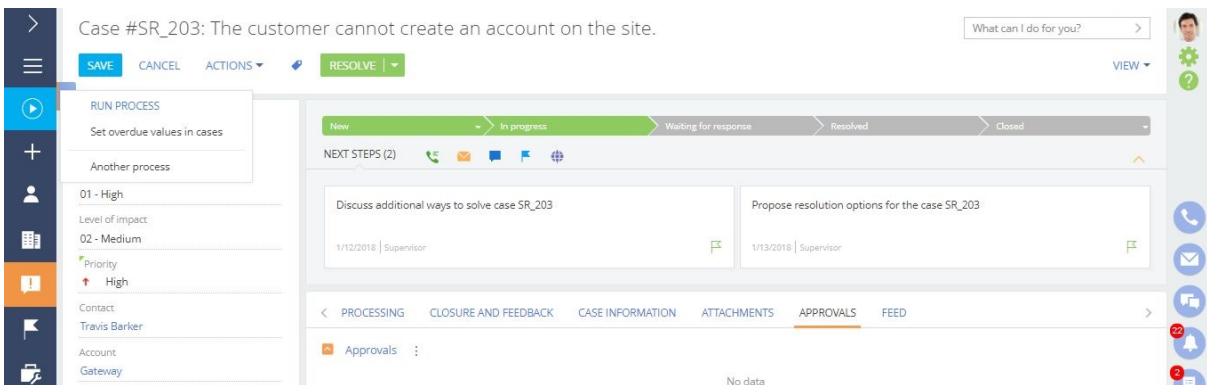
Name	Type	Code
What to do when your laptop's touchpad stops working	FAQ	11
Field sales presentation	Rules and regulations	197-54

Changes

Case	Types of related	Change
SR_205	Caused by change	CR-104
SR_205	Waiting for change	CR-128
SR_205	Caused by change	CR-121

9. Approval of requests

Ability to route different types of cases to different approval procedures using the activated basic approval functionality



Case #SR_203: The customer cannot create an account on the site.

What can I do for you?

SAVE CANCEL ACTIONS RESOLVE VIEW

RUN PROCESS

Set overdue values in cases

Another process

01 - High

Level of impact

02 - Medium

Priority

High

Contact

Travis Barker

Account

Gateway

Next Steps (2)

Discuss additional ways to solve case SR_203

Propose resolution options for the case SR_203

1/12/2018 | Supervisor

1/13/2018 | Supervisor

PROCESSING CLOSURE AND FEEDBACK CASE INFORMATION ATTACHMENTS APPROVALS FEED

Approvals

No data

Problem Management

1. Root cause

In the Root cause field, user can specify the origin of the problem.

The screenshot displays the 'Problem Management' interface for a specific problem, PR_186. The interface includes a sidebar with navigation icons and a main form area. The form contains the following fields:

- Subject**: An error in the report generation process.
- Description**: The report contains incomplete data.
- Root cause**: A dropdown menu is open, showing a list of options: Call, Chat, Email, Forum, Internal, Personal visit, Portal, Site, and Social networks.
- Source**: Call
- Priority**: Call
- Status**: Chat

Below the form, there is a section titled 'PROBLEM PROFILE' with the following fields:

- Type**
- Category**: Personal visit
- Subcategory**: Portal
- Service**: Site

At the bottom of the interface, there is a 'Cases' section with a plus sign and a list of cases.

2. Link between Problem and Configuration items

The link to multiple configuration items can be specified in the Problem page.

PR_186

SAVE CANCEL ACTIONS

PROBLEM PROFILE RESOLUTION FILES APPROVALS FEED

Type: Known error

Category: Hardware malfunction

Subcategory: Main hardware malfunction

Service: Reports generation

Known error: ☐

Reporter: Supervisor

Registration date: 6/24/2017

Scheduled resolution time:

Target date:

Cases + :

No data

Configuration items + :

Configuration item	Category	Status
Switchboard Cisco SB SF100D-16-EU	IT infrastructure	Active
Personal computer Everest Home & Office 1030	Equipment	Active

3. Automatic assignment of the responsible employees basing upon the category of the problem

After the user has selected the category of the problem, the system will automatically place the appropriate group of people in charge. This group is selected from the "Categories of the problem" lookup.

Lookups

NEW CLOSE ACTIONS

Problem category

Filter

Name	Description
Hardware malfunction	System administrators
Software error	2nd-line support
Network problem	3rd-line support

4. Impact and Urgency

The lookup fields of Urgency and Impact are added to the page.

- Impact** is the potential influence that unresolved request has on the company's ability to effectively perform its operations or provide services. For example, the failure of a server that supports a large number of customers can be considered as having a *High* impact on the business.

- **Urgency** stands for the time considered sufficient to resolve the request. For example, there may be a low urgency if a temporary correction or a workaround is available.

PR_177

What can I do for you?

SAVE CANCEL ACTIONS

Subject: Unexpected restarts of virtual machines Number: PR_177

Description: Unexpected restarts of all virtual machines in the department (with different time intervals) several times a day.

Root cause:

Source: Call Assignee: Symon Clarke

Priority: Medium Problem impact level: 01 - High

Status: In progress Assigned team: All employees

Urgency: 03 - Low

PROBLEM PROFILE RESOLUTION FILES APPROVALS FEED

After the service group agent fills in the **Impact** and **Urgency** fields in the request record, the Priority field is populated automatically based on the values of the priority matrix. The priority values for requests help to determine the order in which the requests will be processed.

Lookups

What can I do for you?

NEW CLOSE ACTIONS

Dependence of problem priority on urgency and impact level

Filter

Priority	Urgency	Level of impact
High	01 - High	02 - Medium
Critical	01 - High	01 - High
Medium	01 - High	03 - Low
Low	03 - Low	03 - Low
High	02 - Medium	01 - High
Medium	02 - Medium	02 - Medium
Low	02 - Medium	03 - Low
Medium	03 - Low	01 - High
Low	03 - Low	02 - Medium

5. Workaround

The workaround could be specified in the Workaround field. The workaround is a temporary solution to reduce or eliminate the Impact of the incident or problem, if the complete resolution is not available at the moment. For example, it could be restarting the failed configuration item.

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PR_177

SAVE

CANCEL

ACTIONS ▾

🔖

Subject *

Unexpected restarts of virtual machines

Description

Unexpected restarts of all virtual machines in the department (with differen

Root cause

Source

Priority *

Medium

Status *

In progress

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PROBLEM PROFILE

RESOLUTION

FILES

APPROVALS

FEED

Closure reason

Bpmonline Open Sans

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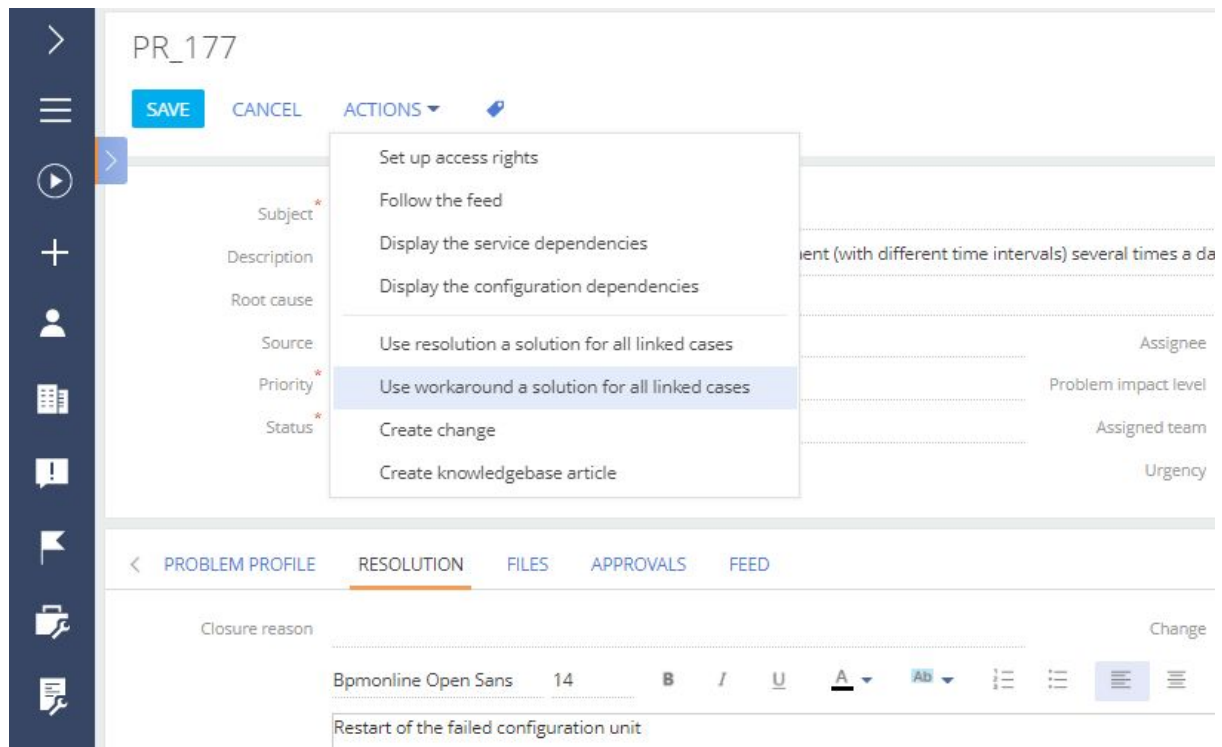
A ▾

A

Restart of the failed configuration unit

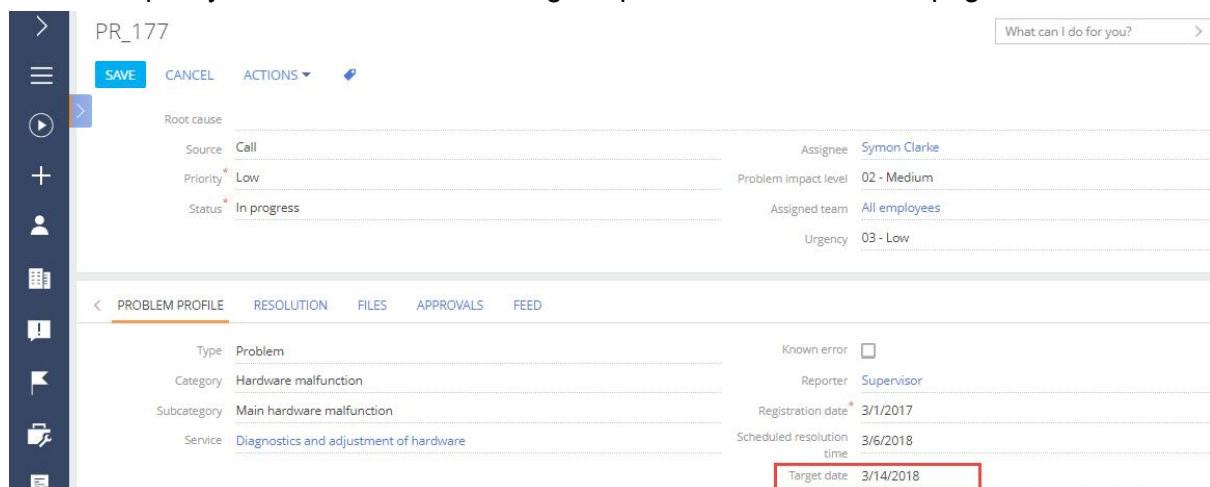
Workaround

The workaround can be automatically applied to all subordinate unresolved requests using the Actions menu => Use workaround for subordinate requests



6. Escalating the problem

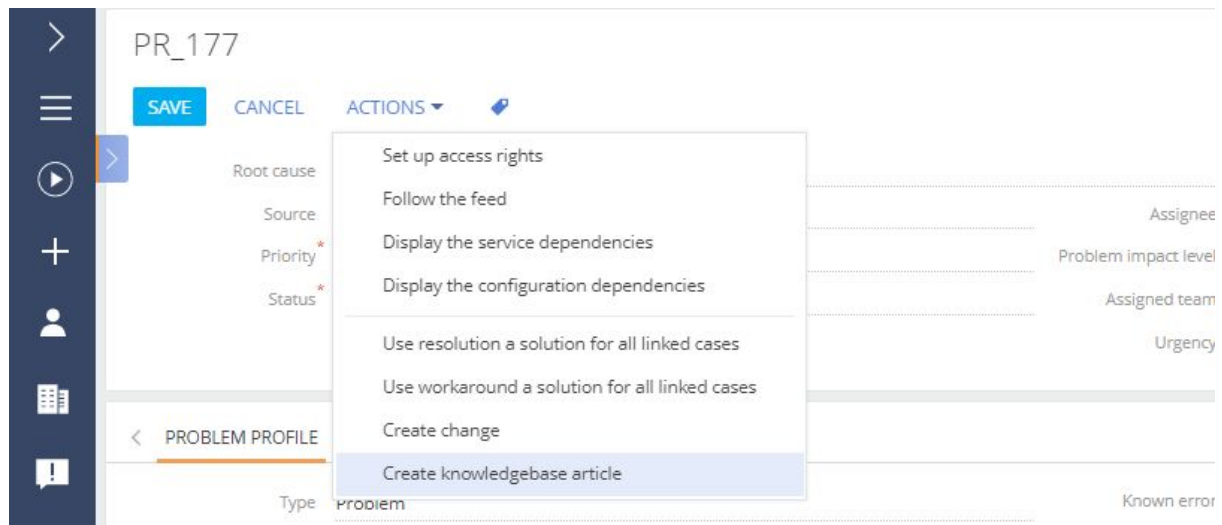
User can specify the Deadline for resolving the problem in the Problem page.



In case of deadline violation, the system automatically escalates to the supervisor of the responsible employee.

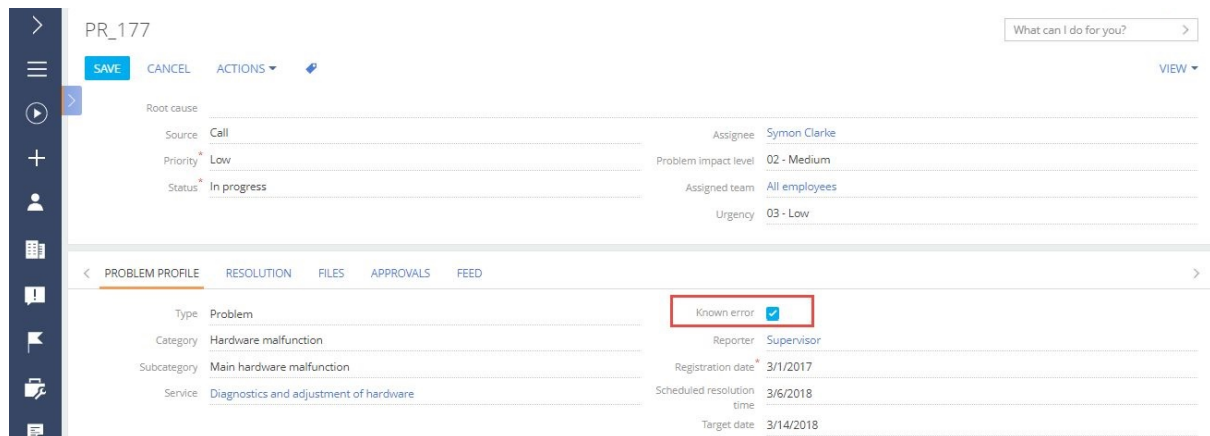
7. Quick creation of an article from the workaround

From the Problem page, user can quickly create a Knowledge Base article using solutions from the Workaround field. To do this, click Actions => Create Article



8. Known Error Attribute

When the root cause and the workaround are identified and set for the Problem, the problem is considered a Known error. To activate this feature, user should activate the "Known bug" attribute.



9. Reason for closing the problem

The Reason for closing field was added to the Problem's page in order to collect statistics on the reasons for closing problems.

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PR_2

SAVE

CANCEL

ACTIONS ▾

🔖

Subject* Unexpected restarts of virtual machines

Description Unexpected restarts of all virtual machines in the department (with different time intervals) several

Root cause

Source

Status* New

Problem impact level 01 - High

Priority* Critical

Assign

< PROBLEM PROFILE

RESOLUTION

FILES

APPROVALS

FEED

Closure reason Known error

Enhancement Request

Known error

Solution database

Unresolvable

Workaround

10. Categories and subcategories of the problems

The related Category and Subcategory lookups have been added to the Problem page to perform the correct problem categorization.

PR_177

SAVE CANCEL ACTIONS

Subject * Unexpected restarts of virtual machines

Description Unexpected restarts of all virtual machines in the department (with different time intervals) several times a day.

Root cause

Source Call Assignee Symon Clarke

Priority * Low Problem impact level 02 - Medium

Status * In progress Assigned team All employees

Urgency 03 - Low

< PROBLEM PROFILE RESOLUTION FILES APPROVALS FEED

Type Problem

Category Hardware malfunction

Subcategory Main hardware malfunction

Service Diagnostics and adjustment of hardware

Known error ☒

Reporter Supervisor

Registration date * 3/1/2017

Scheduled resolution time 3/6/2018

Target date 3/14/2018

Cases + :

11. Critical problem Analysis

Upon the Critical Priority problem resolution it is necessary to analyze this problem with the objectives to assess:

- what has been done well,
- what has been done wrong,
- what could have been done better,
- what could be done to avoid the recurrence.

The system will automatically create a task for the supervisor of the responsible employee to carry out the analysis.

PR_9

CLOSE ACTIONS RUN PROCESS

What can I do for you? >

VIEW

Resolution

Actual resolution time Closed on

Activities + :

Title	Start	Status
Analysis of the critical problem	3/14/2018 6:29 PM	Completed

12. Quick creation of the change from the problem

The system allows you to quickly create changes from a problem, automatically duplicating the main fields (topic, description) values, links (services, configuration items) and establishing a link between the Change and Problem.

The screenshot shows the 'PR_177' problem profile page. The 'ACTIONS' menu is open, displaying several options. The 'Create change' option is highlighted. The page also shows the problem details and a sidebar with navigation icons.

Field	Value
Subject	
Description	
Root cause	
Source	
Priority	
Status	
Assignee	Symon Clarke
Problem impact level	02 - Medium
Assigned team	All employees
Urgency	03 - Low
Type	Problem
Category	Hardware malfunction
Subcategory	Main hardware malfunction
Service	Diagnostics and adjustment of hardware
Known error	<input checked="" type="checkbox"/>
Reporter	Supervisor
Registration date	3/1/2017
Scheduled resolution time	3/6/2018
Target date	3/14/2018

In case the Change has already been created, the system displays a warning.

The screenshot shows a 'Question' dialog box with the following text: 'A change based on this problem has already been added. Do you wish to add a new change?'. There are two radio buttons for 'Yes' and 'No'. The 'Yes' option is selected.

What can I do for you

SAVE PERFORM LATER CLOSE

A change based on this problem has already been added. Do you wish to add a new change?

☒ Yes
☐ No

13. Quick creation of a problem from the configuration item

The system allows you to quickly create a Problem from the Configuration item, automatically populating the Topic and establishing a link between the configuration item and the problem.

> Switchboard Cisco SB SF100D-16-EU

SAVE CANCEL ACTIONS

Follow the feed
Display dependencies
Create problem

Name * EU

Category *

Type Switchboard

Model

Status * Active

Inventory number 1000202

Serial number

14. Link with Knowledge base

User can see the knowledge base articles that can be useful in solving the problem in the Problem page.

> PR_183

SAVE CANCEL ACTIONS

Type Problem

Category Hardware malfunction

Subcategory Main hardware malfunction

Service Consultations on the company's products

Known error ☐

Reporter Supervisor

Registration date * 12/15/2017

Scheduled resolution time

Target date

Cases + :

No data

Configuration items + :

No data

Knowledgebase articles + :

Knowledge base article	Type
New Presentation Style	Advertising materials
Magazine Advertising	Advertising materials