ITSM Module User Guide

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.

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 d

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
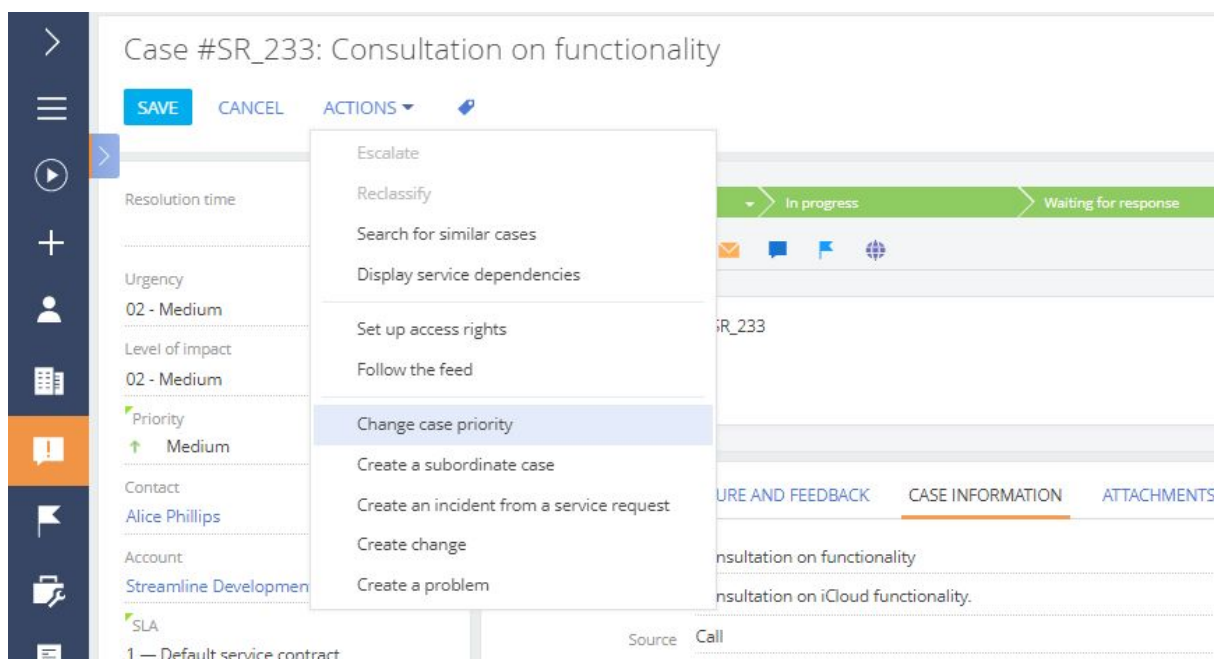
responsible person. This functionality is carried out through the process called "Notification on case expiration"
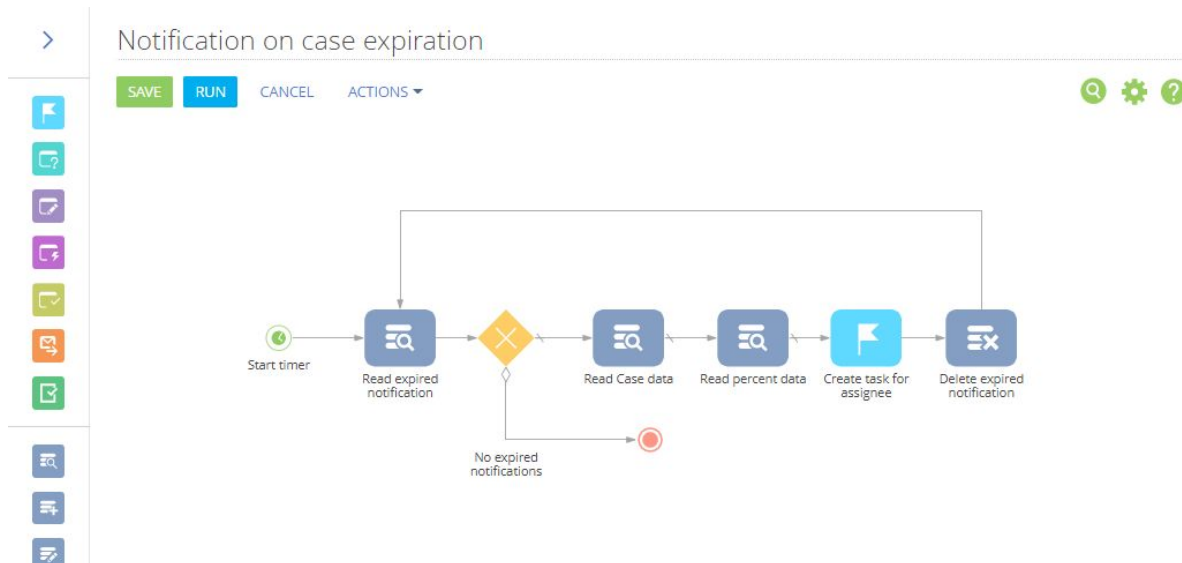
3. Indication of reasons for changing the priority

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.

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".
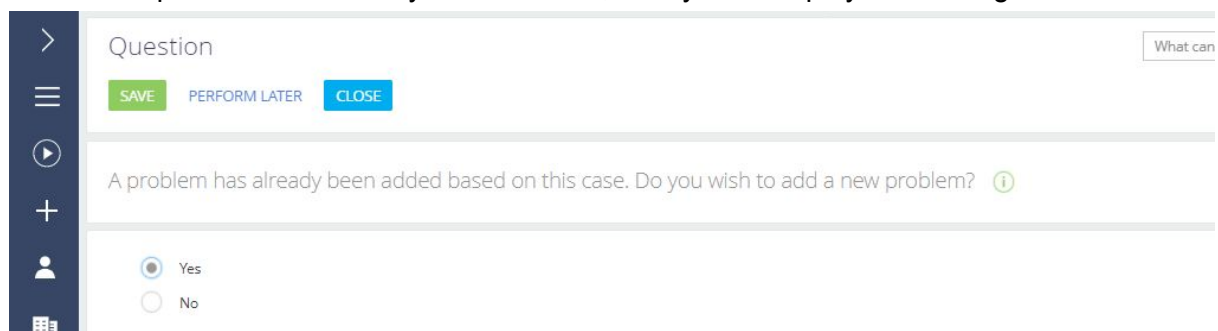

5. Fast creation of the Problem from the Case

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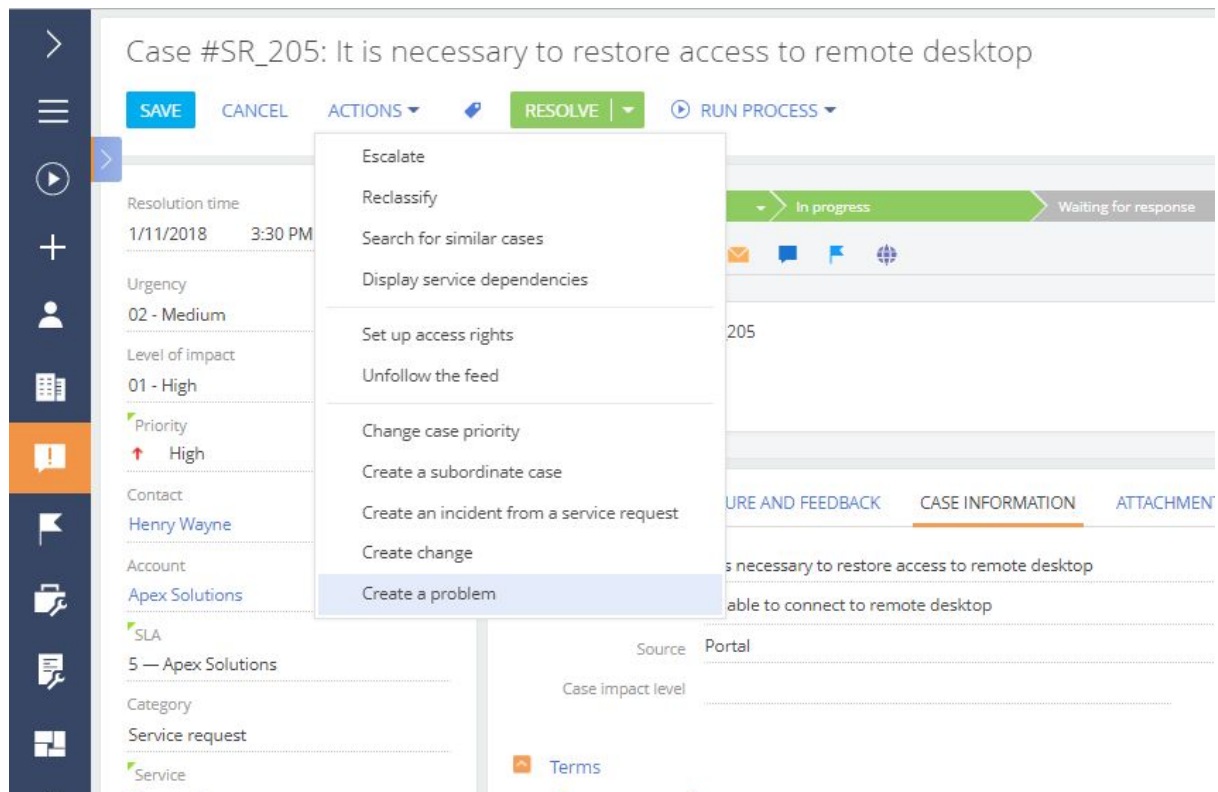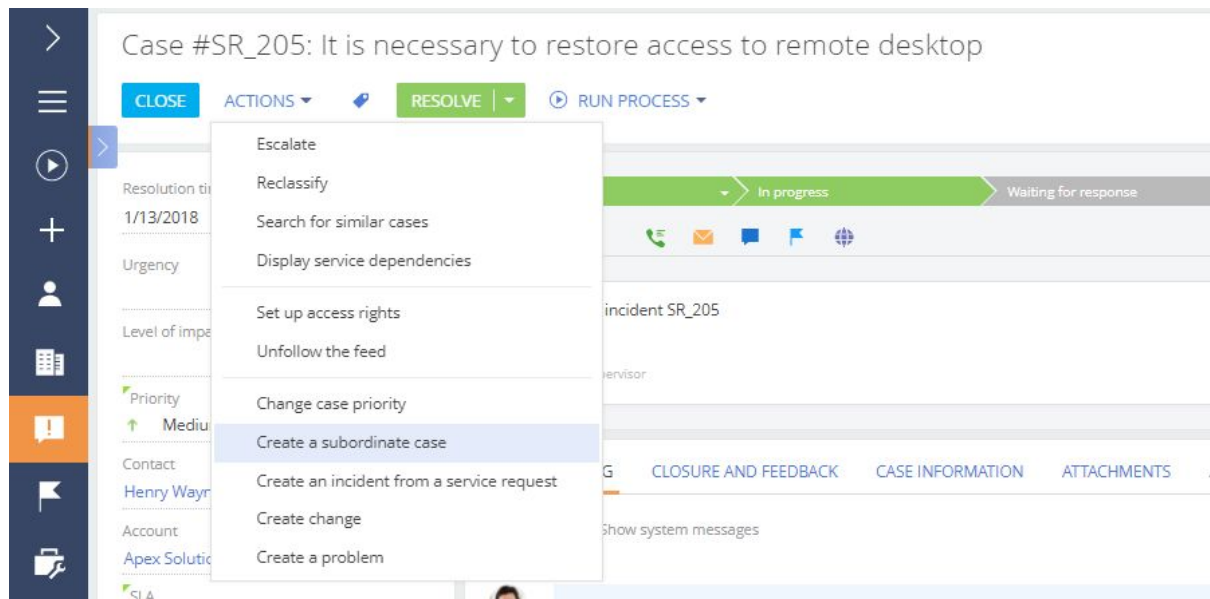
In case the problem has already been created, the system displays a warning.

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).
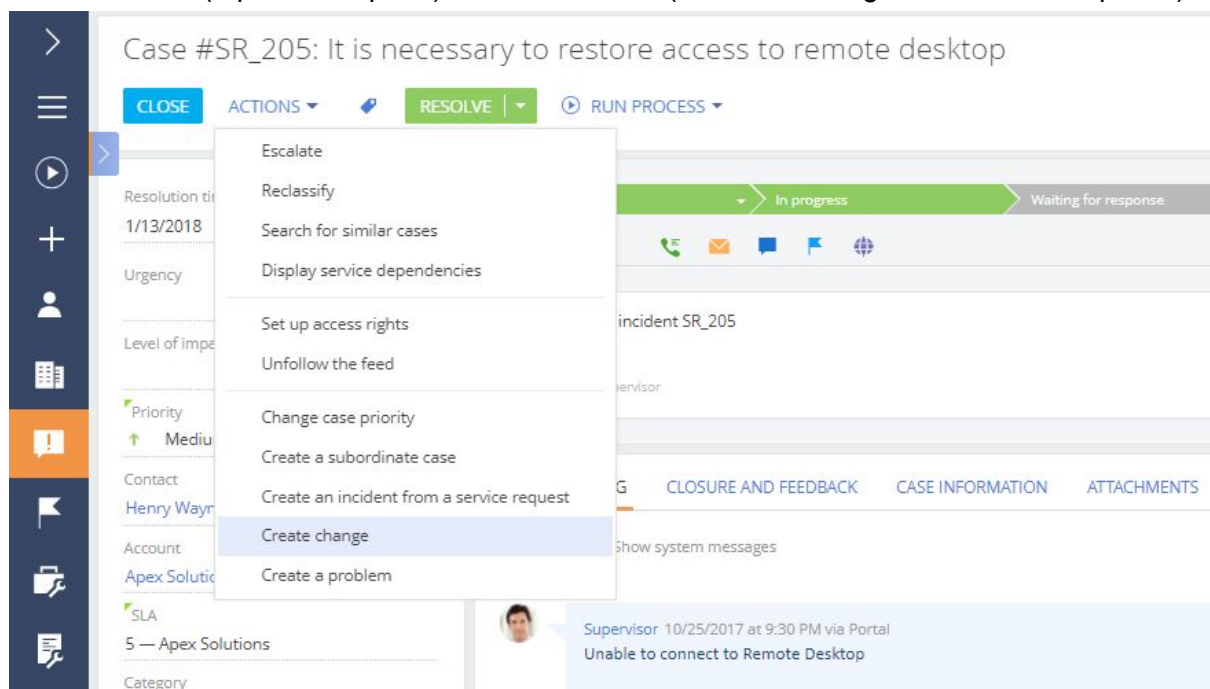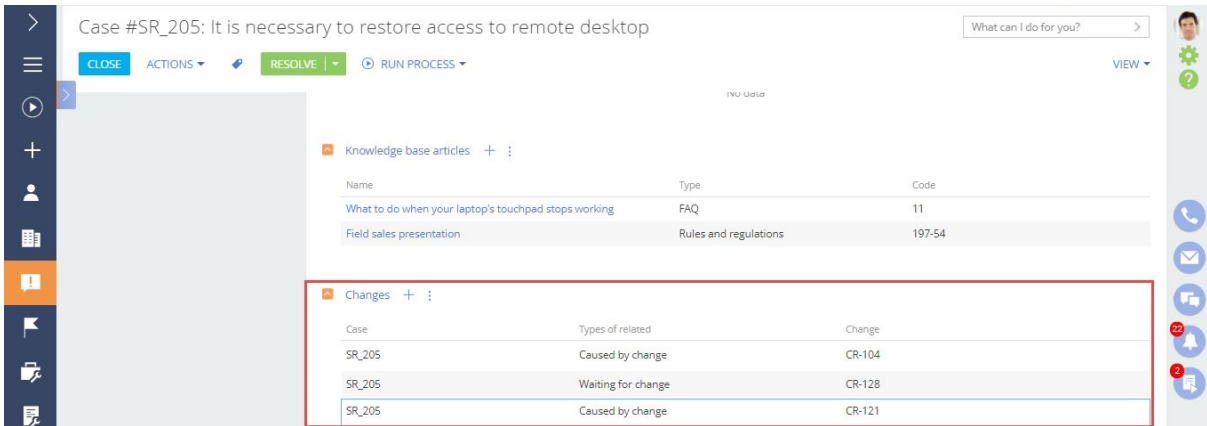
8. Different types of links between Request and Change

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
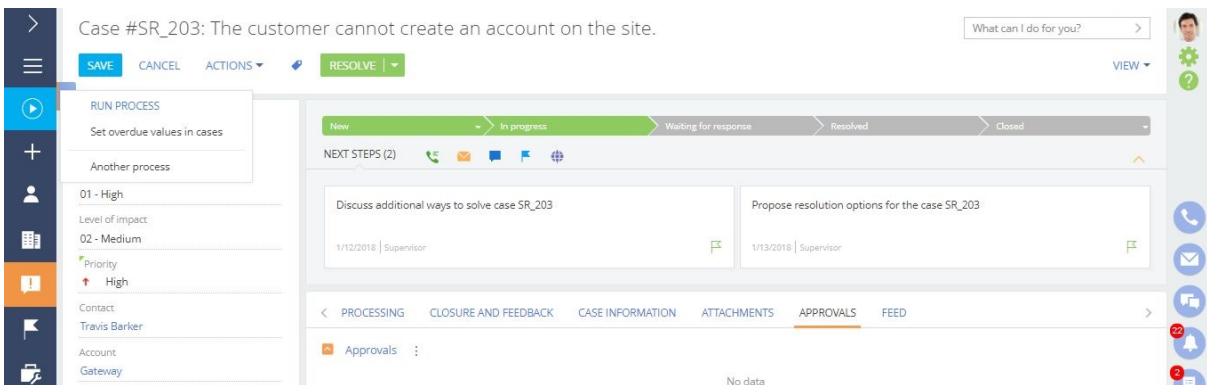
9. Approval of requests

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

Problem Management

1. Root cause

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

2. Link between Problem and Configuration items

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

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.

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.

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.

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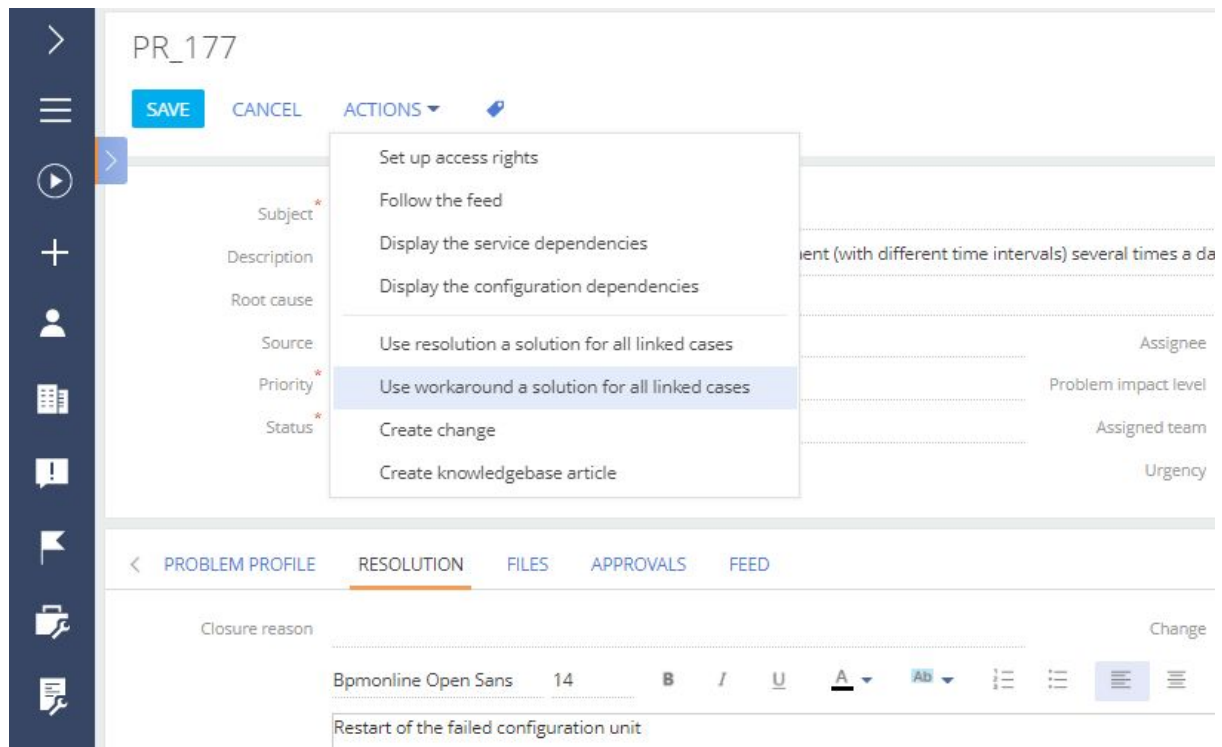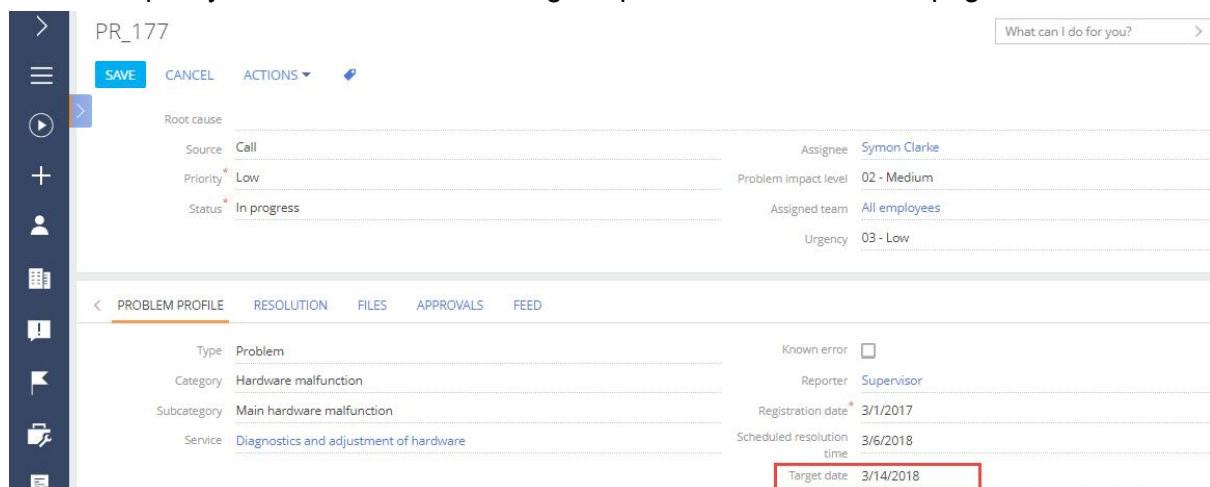
The workaround can be automatically applied to all subordinate unresolved requests using the Actions menu => Use workaround for subordinate requests

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
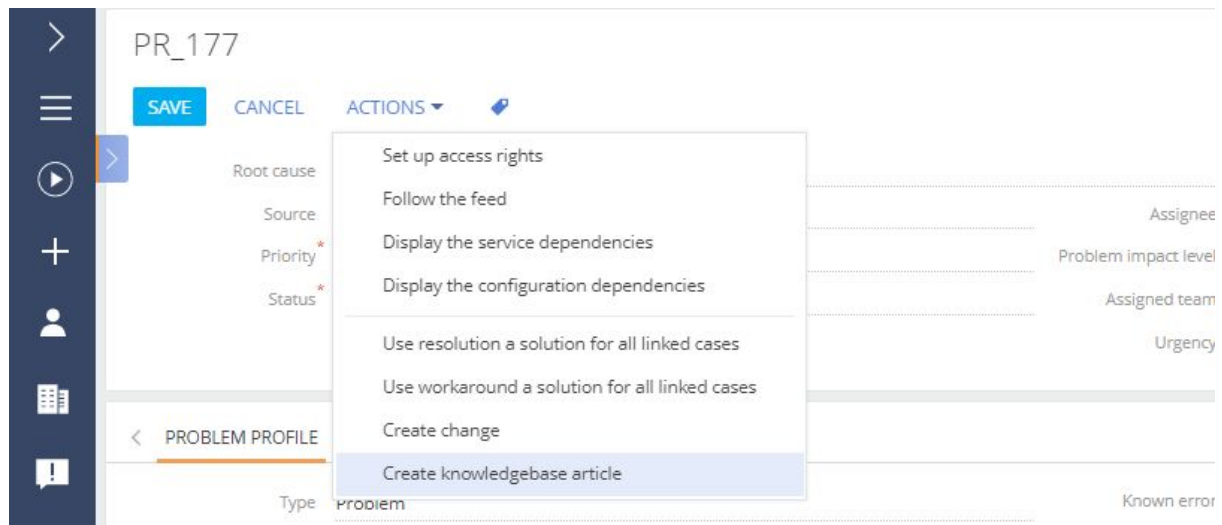
8. Known Error Attribute

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.
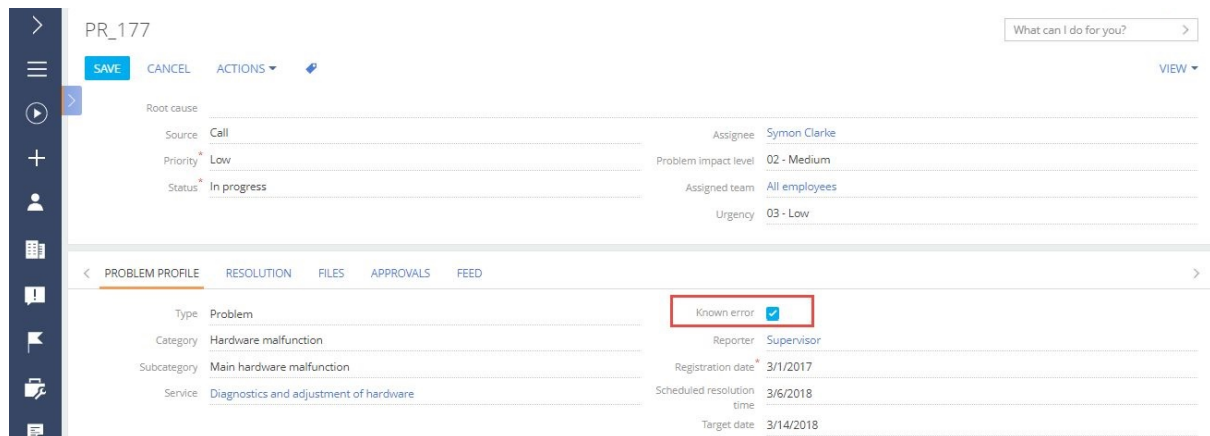
9. Reason for closing the problem

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

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.

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.

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.

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

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.

14. Link with Knowledge base

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